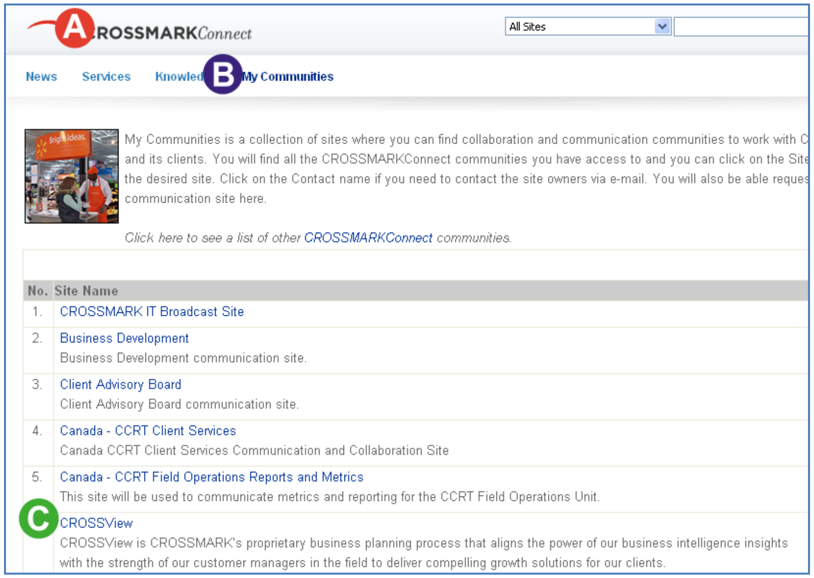
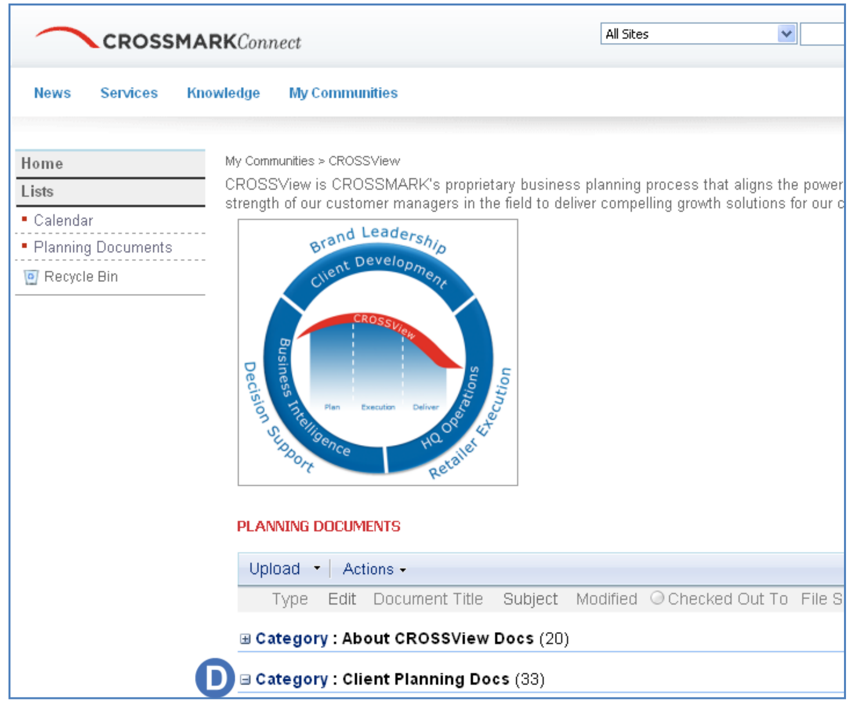
Planner Template File

The template for your specific planner will be located on **CROSSMARKConnect** on the My Communities page.





A Make sure you are in the CROSSMark*Connect* website.

B Click the **MyCommunities** menu option.

C Click CROSSView from the list of community websites.

D Once you are in the CROSSView website, click the **Client Planning Docs** category and find your specific client files.

Your Manager will inform you of the location of your file(s.)

Worksheets Contained in the Planner

A **Title Sheet** – Contains information pulled from Q1 sheet and Codes sheet.

B **Budget Summary** – Is auto populated with data from the BudgetSummaryInput sheet.

C **Q1, Q2, Q3, Q4** – Contains the quarterly planned promotions for the client. Some data must be entered on this sheet. Some data flows from the eXchange Bridge sheet. Drop-down box data flows from the Codes sheet.

D **Promotional Calendar** – Contains data from the Q1, Q2, Q3, Q4 sheets and is setup for sorting and printing.

E **ExchangeBridgeInput** –Contains data that has been imported from eXchange Bridge regarding your specific client. The data in the sheet flows to the Q sheets and the Codes sheet. **You do not need to enter any data on this sheet**.

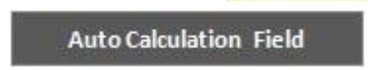
F **BudgetSummaryInput** –Contains budget information provided by the client and entered by the Account Executive. This data flows to the Budget Summary page.

G **Codes** –Contains various codes that flow to other sheets within the planner. **You do not need to enter or change any data on this sheet**.

Color Coded Fields

Yellow Field Headers – Enter your data in the columns with yellow headers.

Gray Field Headers – Columns with gray headers contain automatically calculated fields.

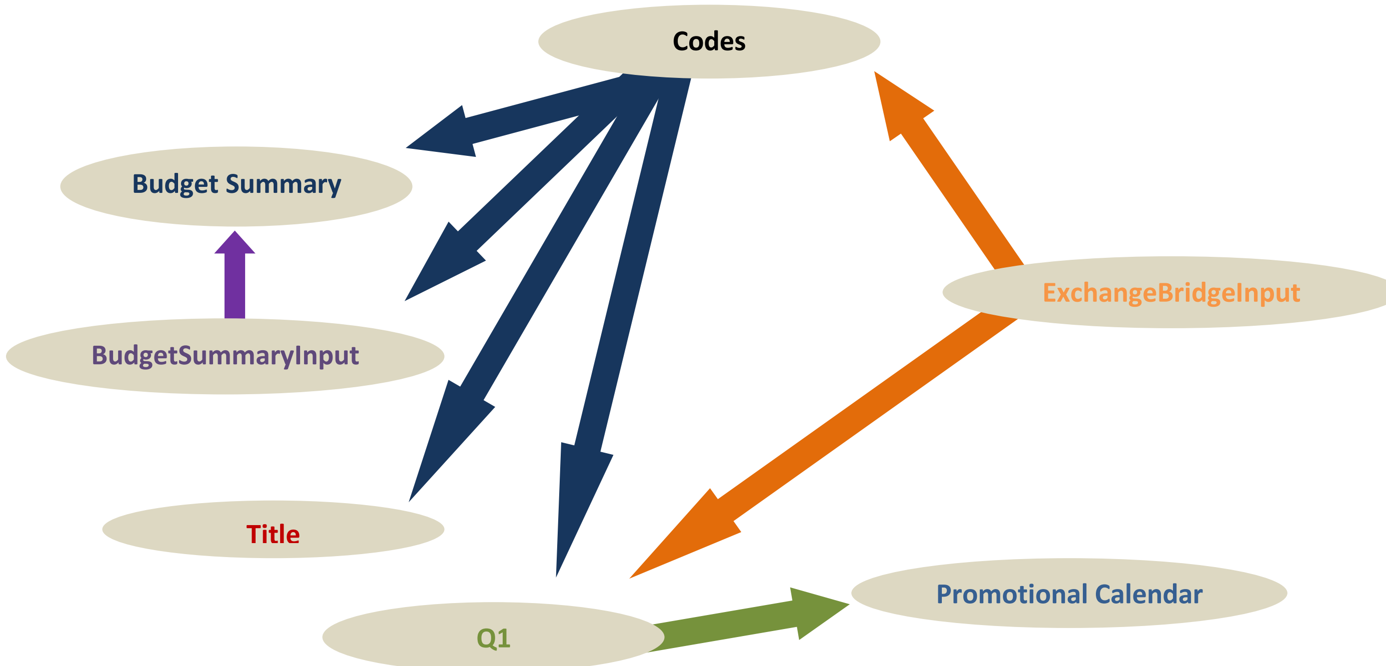


Checklist

- Download the file and make a copy with an appropriate name for each of your clients.
- Populate the Quarterly Sheets with client data.
- Enter data for BudgetSummaryInput sheet.
- Select your options for the Promo Calendar to print for clients and management.
- Print Budget Summary page for clients and management.

Data Flow

The diagram below shows the data flow from each of the sheets in the Planner.



eXchange Bridge Data

Data in the ExchangeBridgeInput sheet is added to the Planner file before you receive it. The data is determined by your Managing Director and is different for each client and region.

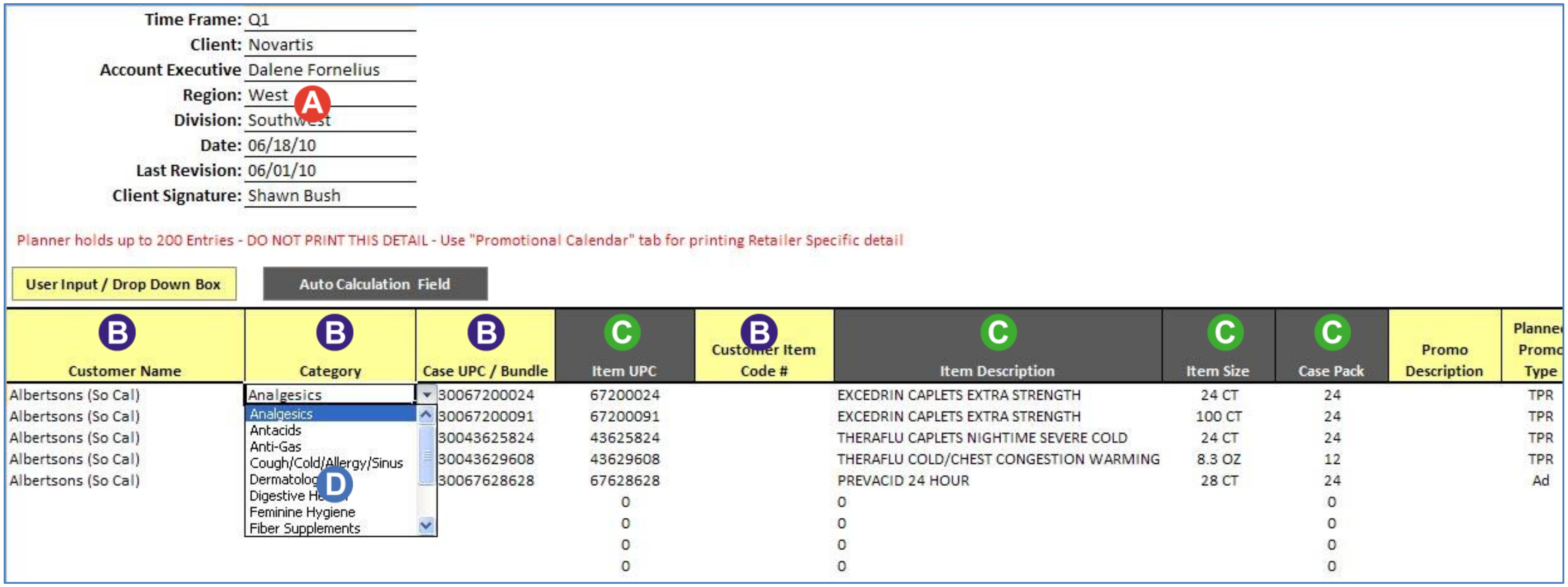
Instructions for Managing Directors to have their data populated into the sheet:

Provide a list of your bundles and categories along with the client name and date that you need the planner. Send the list to Debbie Aday at debbie.aday@exchangebridge.com. She will extract your data from eXchange Bridge and populate the Planner, then email the file back to you. Don't forget to include the CLIENT NAME and a date that you would like to have the populated file returned.

Details of Fields that Contain Data Flow

Worksheet	**Flows to Worksheet**	**Flows to Fields on Worksheet**
Title Sheet	Budget Summary	Region
		Division
		Plan Development Date
Q1	Title Sheet	Client Name
		Region
		Division
		Plan Development Date
		Revision Date
	Promotional Calendar	All data on the sheet
ExchangeBridgeInput	Q1	Item Description
		Item UPC
		Item Size
		Case Pack
	Codes	Category List
		Retailer List
BudgetSummaryInput	Budget Summary (for category fields)	Plan Sales
		Actual Sales
		Spending Budget
		Year to Date Sales
		Year to Date Spend
		Plan Spend
		Actual Spend
Codes	Title Sheet	Retailers
	Budget Summary	Retailer List
	Q1	All of the drop-down lists
	BudgetSummaryInput	Retailer Selection Box

Adding Data to the Q1, Q2, Q3, Q4 Tabs



Customer Name	Category	Case UPC / Bundle	Item UPC	Customer Item Code #	Item Description	Item Size	Case Pack	Promo Description	Planned Promo Type
Albertsons (So Cal)	Analgesics	30067200024	67200024		EXCEDRIN CAPLETS EXTRA STRENGTH	24 CT	24		TPR
Albertsons (So Cal)		30067200091	67200091		EXCEDRIN CAPLETS EXTRA STRENGTH	100 CT	24		TPR
Albertsons (So Cal)		30043625824	43625824		THERAFLU CAPLETS NIGHTIME SEVERE COLD	24 CT	24		TPR
Albertsons (So Cal)		30043629608	43629608		THERAFLU COLD/CHEST CONGESTION WARMING	8.3 OZ	12		TPR
Albertsons (So Cal)		30067628628	67628628		PREVACID 24 HOUR	28 CT	24		Ad
			0		0		0		
			0		0		0		
			0		0		0		
			0		0		0		

A Enter your account information at the top of the page.

B Input fields are shown in yellow.

C Calculated fields are shown in gray.

D Enter all of your promotional product data for all retailers for the specific client in the yellow fields. Click the **drop-downs** to select your options. The data in the drop-down lists flows to the **Quarterly** sheets from the **Codes** page. The gray auto-populated fields flow from the eXchange Bridge data. There are some yellow fields that do not have drop-down lists that you will need to provide data for, such as the Customer Item Code # field. When you select an option from the yellow fields, data is automatically updated in the gray fields.

After you have entered all of your data, **Save** your file and continue to the next "**Q**" tab if your specific client is planning for those quarters as well.

Entering Data in the BudgetSummaryInput Tab

Client:	Novartis
Region:	West
Division:	Southwest
Plan Development Date:	06/18/10

SELECT A RETAILER FOR INPUT			
Albertsons (So Cal)	Albertsons LLC	Retailer 11	Retailer 16
Jewel	Other	Retailer 12	Retailer 17
Shaws	Retailer 8	Retailer 13	Retailer 18
Acme	Retailer 9	Retailer 14	Retailer 19
Albertsons IMW	Retailer 10	Retailer 15	Retailer 20
			Top of Sheet

A

User Input

Auto Calculation Field

Albertsons (So Cal) 1

Analgesics

Period		1	Plan Sales	Actual Sales	Year to Date Sales	Year to Date Spend	Spending Plan	Actual Spending
1Q	1-1-1Q	1-1	$200,000	$225,000				$16,760
2Q	1-1-2Q	1-1						$0
3Q	1-1-3Q	1-1						$0
4Q	1-1-4Q	1-1						$0
Total								$16,760

B

Antacids

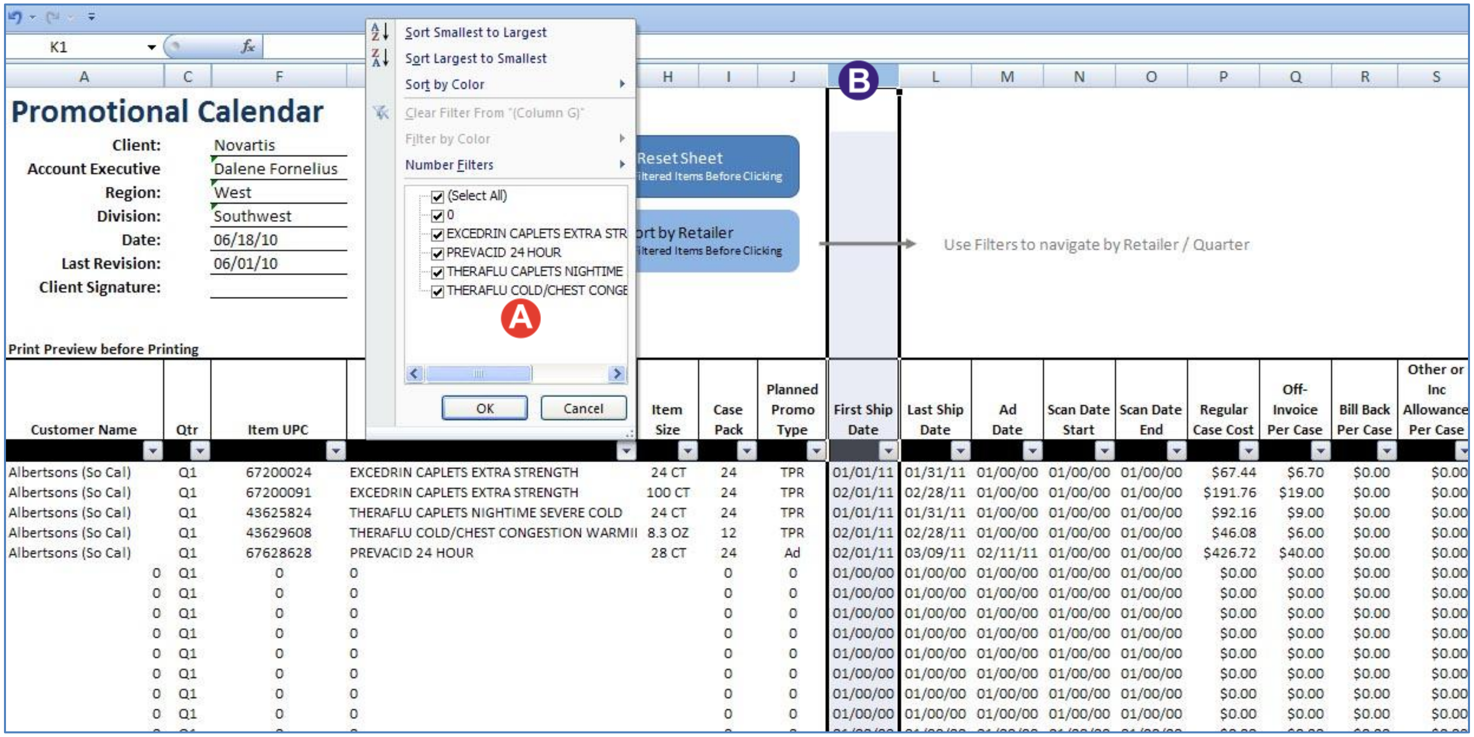
					Year to Date	Year to Date	Spending	

A Click a Retailer name from the SELECT A RETAILER FOR INPUT box at the top of the page to jump to a specific retailer to enter their data. Or simply start entering from the top in the yellow fields.

B Once again you will notice that there are yellow user input fields and gray auto calculated fields.

Enter the **Plan Sales**, **Actual Sales, Year to Date Sales, Year to Date Spend and Spending Plan** in the yellow fields.

Sorting and Printing the Promotional Calendar



The Promotional Calendar has sorting options for each column. Sort by **Customer Name**, **Item** or **Promotional Type**, etc.

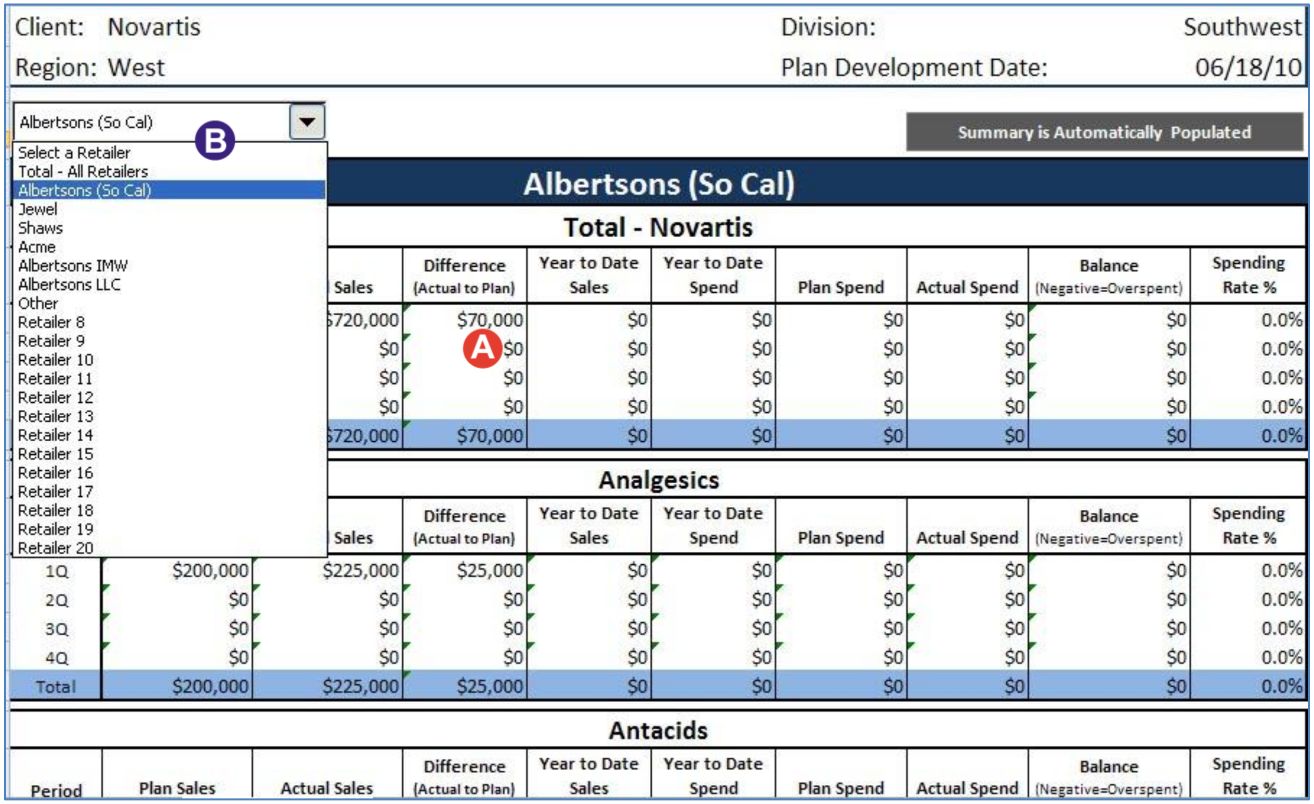
To sort a column, click the **column header** and select the desired options from the list.

Before you print the data for your client, you might want to hide a few of the columns, depending on what you want to discuss with the client. To hide a column, simply click on the top of the column to select it. Right click and select **Hide**.

To go back and unhide the columns, select the cells next to the hidden cell, right click and select **Unhide**.

Once you have your sheet setup, select **Print Preview**. After you have the proper print options selected, click **Print**.

Sorting and Printing the Budget Summary


Client: Novartis
Division: Southwest
Region: West
Plan Development Date: 06/18/10

Albertsons (So Cal)
Select a Retailer
Total - All Retailers
Albertsons (So Cal)
Jewel
Shaws
Acme
Albertsons IMW
Albertsons LLC
Other
Retailer 8
Retailer 9
Retailer 10
Retailer 11
Retailer 12
Retailer 13
Retailer 14
Retailer 15
Retailer 16
Retailer 17
Retailer 18
Retailer 19
Retailer 20

Summary is Automatically Populated

Albertsons (So Cal)

Total - Novartis

Sales	Difference (Actual to Plan)	Year to Date Sales	Year to Date Spend	Plan Spend	Actual Spend	Balance (Negative=Overspent)	Spending Rate %
$720,000	$70,000	$0	$0	$0	$0	$0	0.0%
$0	$0	$0	$0	$0	$0	$0	0.0%
$0	$0	$0	$0	$0	$0	$0	0.0%
$0	$0	$0	$0	$0	$0	$0	0.0%
$720,000	$70,000	$0	$0	$0	$0	$0	0.0%

Analgesics

Period	Plan Sales	Actual Sales	Difference (Actual to Plan)	Year to Date Sales	Year to Date Spend	Plan Spend	Actual Spend	Balance (Negative=Overspent)	Spending Rate %
1Q	$200,000	$225,000	$25,000	$0	$0	$0	$0	$0	0.0%
2Q	$0	$0	$0	$0	$0	$0	$0	$0	0.0%
3Q	$0	$0	$0	$0	$0	$0	$0	$0	0.0%
4Q	$0	$0	$0	$0	$0	$0	$0	$0	0.0%
Total	$200,000	$225,000	$25,000	$0	$0	$0	$0	$0	0.0%

Antacids

Period	Plan Sales	Actual Sales	Difference (Actual to Plan)	Year to Date Sales	Year to Date Spend	Plan Spend	Actual Spend	Balance (Negative=Overspent)	Spending Rate %

A Your columns should be populated with data if you have entered your information on the BudgetSummaryInput tab.

B You can sort by Retailer including sorting by "All Retailers."

After selecting the retailer(s), select **Print Preview** and set your print options. After you have the proper print options selected, click **Print**.