

Planning Advantage: User Guide

Bryan Equipment Sales, Inc.

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Welcome

Welcome to Planning Advantage.

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Need Help?

As always, if you encounter issues contact your Bryan Equipment Territory Manager or, for technical assistance, contact our IT team (513) 248-2000 Ext 555

Save your Order Often!

One of the biggest concerns each year is when orders seem to disappear. As with most web sites, for security reasons it will “time out” when there has been no activity for an extended time.

Please save your order regularly, at minimum every 10 minutes to avoid problems

Browser Compatibility

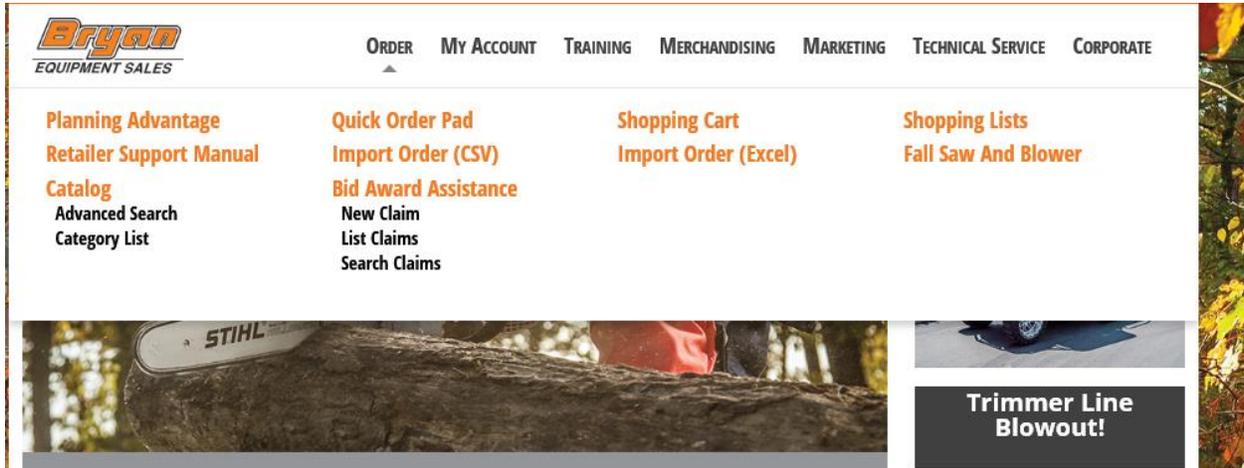
Each year Microsoft, Google and others release new and “improved” browsers. As with every company with an Internet presence we strive to keep up with the ever-changing environment but some browsers, due to age or obscurity, are not supported. We recommend Google Chrome as it is most reliable.

Please save your order regularly, at minimum every 10 minutes to avoid problems

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Getting Started

Choose Planning Advantage under **Order** menu option



When you first open the PA Web page you will see the **promotions tab**. The promotions tab will have information explaining the different promotions and special items within the PA Application.

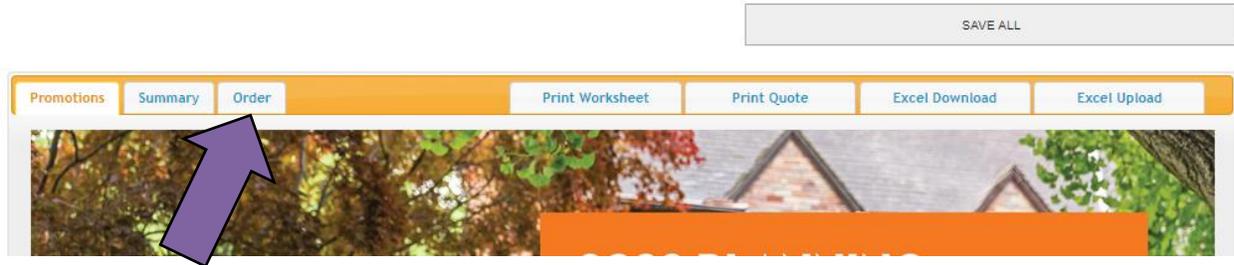
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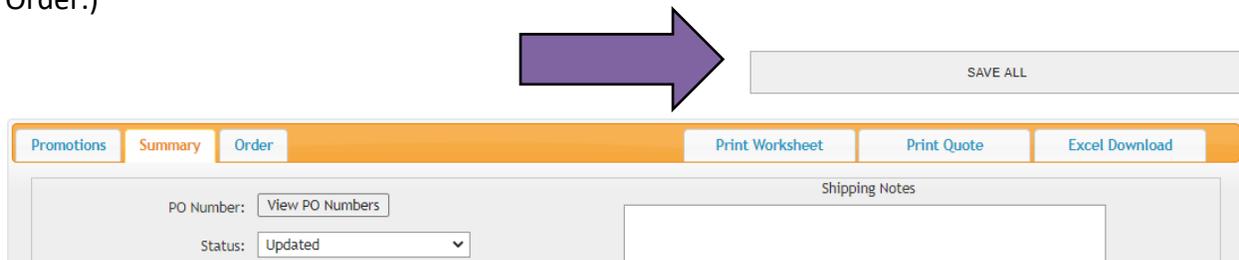
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Once you have looked at the summary of promotions and are ready to update your Planning Advantage order, click on the **Order** Tab at the top left

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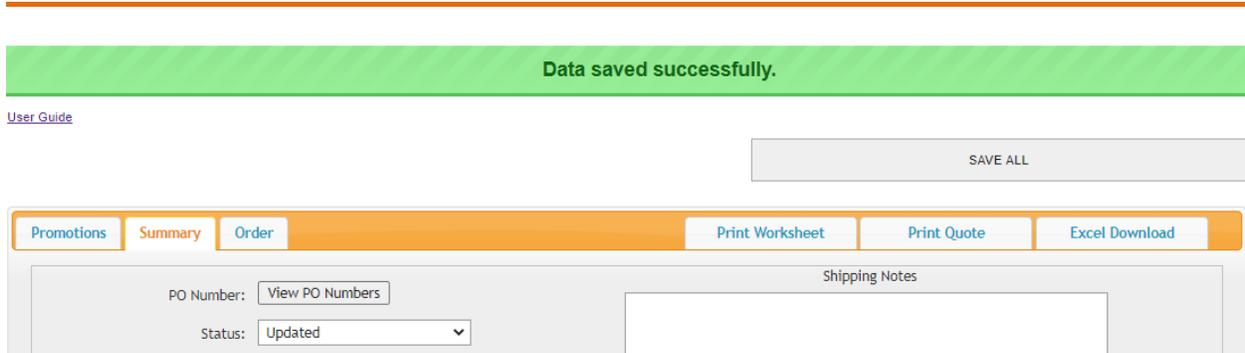


SAVE! – First, the most important button in the Planning Advantage (PA) Web page application is the **Save Button**. You can make all the changes you want, but if the page is closed without clicking the Save All button all of your changes will be lost! (The Save All button is visible and available no matter which of the 3 tabs you might be on: Promotions, Summary, or Order.)



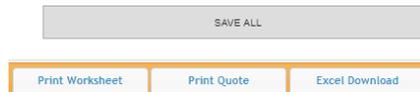
When Save All is clicked, it will also let you know that your changes were saved successfully by giving you the message at the top of the screen as shown below.

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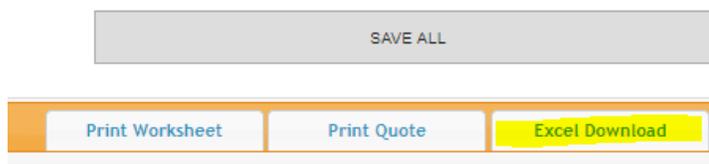
Automatic Saving of Order

We know you are busy and often get interrupted during the process of entering an order. To reduce the likelihood that information is lost, your order will automatically be saved every 5 minutes. You may experience a moment when you cannot enter new information as the data is saved. Please continue to use the SAVE ALL button in a regular basis as insurance that your information is retained.



Excel Download

- Click the Excel Download tab



- Your order will be downloaded to the default download location on your computer. Often this is a folder called Downloads

	A	B	C	D	E	F	G	H	I
1	PA Excel Download								
2	Product Group	Item Number	Description	Status	Sugg Qty	Qty S1	Qty S2	Price	
3	Trimmer Accessories	0000 710 9001	Advance X-TREEm Harness		1	1	0	104.97	
4	Trimmer Accessories	0000 790 4400	RTS CARRIER SYSTEM		2	2	0	97.49	
5	Blower Accessories	0000 790 7700	BR Chest Strap		0	0	0	7.49	
6	Trimmer Accessories	0000 881 8204	Trimmer Line Cutter		120	120	0	142.5	
7	Stihl Precision Tools	0000 882 0710	SHEATH FOR PRUNERS (PP10-PP70)		11	11	0	8.97	

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Excel Upload

The Excel upload uses the file produced by the Excel download. The format of the file must match the original file exactly for the file to be uploaded.



Summary Tab

Here are the different functionalities and their locations on the Summary Tab. (The number after each description corresponds to the number on the image for that item's location.)

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- Click this button to enter your purchase order numbers. 1
- You can enter any order notes here. 2
- This is also the area where you will set the Order Status. 3
 - **There are 2 different type of Order Status:** Updated and Retailer Completed.
 - **Updated:** Each PA order begins with a status of New. Once you make any changes and save the order, the status will be Updated.
 - **Retailer Completed:** When a Retailer Changes the Status to Retailer Completed this will Lock the editing/changing of an order by the Retailer. It will also generate and send an Email to the Territory Manager that the Retailer has Submitted the order.

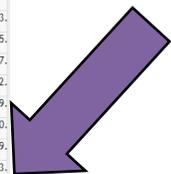
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- Your current tier is displayed here. [4]
- Your corporate order totals are displayed here. 5
- **Remember to SAVE after making any changes to this screen!**

Lastly on the Summary Tab is the **Order Summary**.

- The Order Summary shows each Product Category, Items in Shipment 1 and Shipment 2, and the Extended Price.
- The Order Summary also lists totals and grand totals of Items and Dollar Amount.
- As shown the Grand Total line is highlighted in Green, this indicates that this is a qualifying order. If the order does not qualify the Grand Total line for Units would be highlighted in Red instead.

Product Category	S1	S2	Extended Price
Battery Chainsaws (HISA)	13	0	\$3,543.
Edgers (FC)	43	0	\$13,304.
Trimmers (FS)	497	0	\$125,766.
Electric Trimmers (FSE)	0	0	\$0.
Battery Trimmers (FSA)	34	0	\$5,887.
Kombi Units (KA)	56	0	\$15,184.
Yard Boss (MA)	13	0	\$4,232.
Battery Kombi Units (KMA)	1	0	\$287.
Battery Cutquik (TSA)	3	0	\$1,079.
Handheld Blowers (BG)	178	0	\$26,994.
Electric Handheld Blowers (BGE)	8	0	\$671.
Backpack Blowers (BR)	212	0	\$73,823.
Shredders (SH)	11	0	\$2,199.
Sprayers (SR)	11	0	\$4,237.
Battery Blowers (BGA)	34	0	\$5,663.
Hedge trimmers (HS)	82	0	\$25,975.
Electric Hedge trimmers (HSE)	5	0	\$631.
Extended Hedge trimmers (HL)	43	0	\$16,254.
Battery Hedge trimmers (HSA)	42	0	\$5,903.
Battery Hedge trimmers (HLA)	4	0	\$1,439.
Pole Pruners (HT)	48	0	\$20,063.
Battery Pole Pruner (HTA)	2	0	\$735.
Battery Pruners (GTA)	21	0	\$2,687.
Battery Mower (RMA)	17	0	\$8,142.
Augers and Drills (BT)	8	0	\$3,769.
Vacuums (SE)	0	0	\$0.
Pressure Washers (RB)	24	0	\$16,119.
Electric Pressure Washers (RE)	8	0	\$1,423.
Subtotal:	1418	0	\$386,036.



Order Tab

Here are the different functionalities and their locations on the Order Tab. (The number after each description corresponds to the number on the image for that item's location.)

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Current Yr Jan-July Lawn & Garden Purchases: \$ 59.00

Required Split Value: \$ 108.00

Tier Qualifying Value: \$557,115.00

Actual Order Value: \$552,962.63

Split 4

Zero 5

Pricing shown is based on retailers current tier. Actual pricing will be based on the pricing tier earned in the current year. [Click here for current sales information](#)

"Zero" will set all values to zero.

Category	Item	Description	History	Shipment		Units Per		Skid	Price	Extended Pri
				1	2	Box				
Trimmers (FS)										
Trimmers (FS)	FS 38	FS 38 TRIMMER	8	2	0	2	32		\$111.99	
Trimmers (FS)	FS 40 C-E	FS 40 C-E EASY2START TRIMMER	16	0	0	2	32		\$135.99	\$2175.84
Trimmers (FS)	FS 50 C-E	FS 50 C-E EASY2START TRIMMER	0	0	0	2	32		\$155.39	
Trimmers (FS)	FS 56 RC-E	FS 56 RC-E EASY2START TRIMMER	74	74	0	2	24		\$162.79	\$11949.56
Trimmers (FS)	FS 56 C-E	FS 56 C-E BIKE HANDLE EASY2START TRIMMER	0	0	0	2	32		\$184.99	
Trimmers (FS)	FS 70 R	FS 70 R TRIMMER W/AUTOCUT	8	8	0	2	24		\$199.79	\$1598.32
Trimmers (FS)	FS 91 R	FS 91 R TRIMMER	78	78	0	2	24		\$221.99	\$17311.22
Trimmers (FS)	FS 91	FS 91 TRIMMER	6	6	0	2	32		\$266.39	\$1598.14
Trimmers (FS)	FS 94 R	FS 94 R TRIMMER	118	118	0	2	24		\$258.99	\$30560.82
Trimmers (FS)	FS 111 R	FS 111 R TRIMMER	86	86	0	2	24		\$295.99	\$25455.14
Trimmers (FS)	FS 111 RX	FS 111 RX TRIMMER	52	52	0	2	24		\$281.19	\$14622.88
Trimmers (FS)	FS 111	FS 111 TRIMMER	0	1	6	2	32		\$318.19	
Trimmers (FS)	FS 131 R	FS 131 R TRIMMER	28	28	0	2	24		\$318.19	\$8911.32
Trimmers (FS)	FS 131	FS 131 TRIMMER	8	8	0	2	32		\$340.39	\$2723.12
Trimmers (FS)	FS 240 R	FS 240 R TRIMMER W/AUTOCUT 25-2	6	6	0	2	24		\$466.19	\$2797.14

- The first item to notice is the totals for this order. This is shown at the top right of the page and will update as you edit the order. 1
- **Edit The Order:** The Order Tab is also where you edit or change the order and quantities. This is a very simple process. You just click your mouse in the Shipment 1 (S1) or Shipment 2 (S2) quantity of whichever item you want to edit. 2
 - For example, let us take item BGA 85 36VOLT BGA85 BLOWER. If you just click into the Shipment 1 quantity which is a 2 right now and change it to a 3 it will update the extended price, and Actual Order Value as soon as you get out of that field. Getting out of the field after you edit it is very easy. You have several options: you can click out with your mouse, hit the Enter key on your keyboard, or hit the Tab key on your keyboard; you can even use the Arrow keys on the keyboard.
- **The highlighted rows:** The rows that you see highlighted on the Order Tab are **special items**. These items are highlighted to let users know they are a special

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item and that more information can be viewed about that item on the Promotions Tab. [3]

- Lastly on the Order Tab are 2 buttons: **Split, and Zero**. **WARNING! These buttons will change all the work you have done to date so use them carefully! The action cannot be reversed!**

- Split will divide the order into 2 separate shipments. [4] This function only splits the Units; it will not split any other items.
- Zero will zero out all quantities for the order. [5] A box will pop up asking you to confirm the action.
- When entering item quantities if the quantity entered is not a valid box quantity that quantity box will be highlighted in Red [6]



Be sure to click the SAVE ALL button often as you enter information to protect your work.

Print Worksheet, Print Quote, Excel Download

To the right on the header you will see buttons labeled **Print Worksheet, Print Quote, Excel Download**

Print Worksheet

The Print Worksheet Button [1] will open a PDF file for the Order that can be Printed and filled out by hand if desired. Here is an example of that PDF. [2]

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Planning Advantage

2

0102: Lithium Chainsaws (MSA)

Status	Item ID	Item Desc	Units Sold			Pallet Qty	Order Qty	Price
			Pr Yr	Curr Yr	Proposed			
	MSA160CB 12	MSA160CB W/12in BAR & CHAIN	0	0		16		
NEW	MSA160T 12	MSA160T W/12in BAR & CHAIN	0	0		16		
	MSA200CBQ 14	MSA200CBQ W/14in BAR & CHAIN	0	0		16		
			0	0				

0110: Edgers (FC)

Status	Item ID	Item Desc	Units Sold			Pallet Qty	Order Qty	Price
			Pr Yr	Curr Yr	Proposed			
	FC110	FC110 STRAIGHT SHAFT EDGER	0	0		16		
	FC56CE	FC56 EASY2START EDGER	2	0		16		
	FC70	FC70 EDGER	2	0		16		
	FC90	FC90 EDGER	0	0		16		
	FC95	FC95 EDGER	2	0		16		
			6	0				

Print Quote

The Print Quote Button 3 is like the Print Worksheet except it will be a PDF of what the order currently looks like. It will have the quantities and dollar amounts for the order as entered. 4

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SAVE ALL

Promotions

Summary

Order

Print Worksheet

Print Quote

Excel Download

3

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The spreadsheet will have the columns you see below. DO NOT alter the format of the Excel file. Altering the format will result in a failed upload. Only change the values in the Qty S1 and Qty S2 columns.

PA Excel Download

Product Group	Item Number	Description	Status	Sugg Qty	Qty S1	Qty S2	Price
Trimmer Accessories	0000 710 9001	Advance X-TREEm Harness		0	0	0	104.97
Trimmer Accessories	0000 790 4400	RTS CARRIER SYSTEM		0	0	0	97.49
Blower Accessories	0000 790 7700	BR Chest Strap		0	0	0	7.49
Trimmer Accessories	0000 881 8204	Trimmer Line Cutter		150	150	0	0.95

End