

Standard Operating Procedure Provisions – Account Management Portal

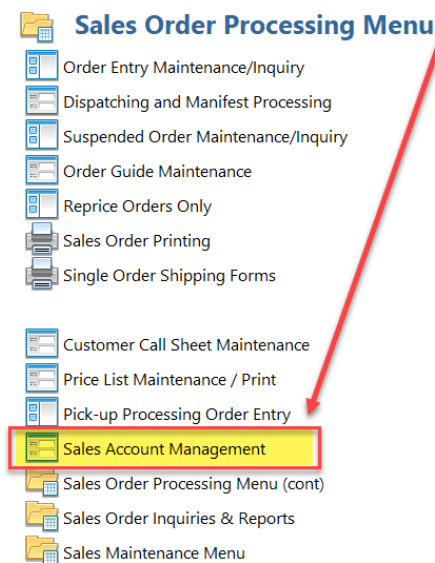
Dole & Bailey, Inc.

Implementation Date: 7/27/23

PURPOSE: Inform Sales on the techniques and tools possible with Sales Account Management Portal

Portal within Sales Order Processing Menu that allows Sales to quickly see all Open Orders in system for their Territory, Access and Edit those order by Customer and process NOTES by Customer if helpful.

- Access the Sales Order Processing Menu and locate Sales Account Management



- Contact Management Screen will come up and you will want to locate and populate the Salesperson Code box with your Salesrep Number or the individual you are supporting.

The image shows a screenshot of the "Contact Management" software interface. At the top, there are tabs for "Prospects", "Customers" (which is selected), and "Suppliers". Below the tabs, there are search fields for "Salesperson Code", "Buyer Code", "Broker Code", and "Account Mgr. Code". A "Keyword:" field is also present. Below these fields is a table with columns: Code, Customer Name, Telephone, Last Sale, Open Order \$, Last Pmt., Open A/R \$, and Status. The table contains 20 rows of data, including customer names like "Use for Testing", "MICHAEL DIMAMBIRO", "CERABONE ROY", "NATALIA ABRAM", "JASON HOLT", "ACOSTA, PAMELA", "L-7 WINTER GRILLE", "KATIE NOTARTOMASO", "EATON, MELANIE", "75 HAYDON - EDWINGTON", "C-743 KITCHEN - CLIFTON PARK", "7A FOODS", "7A FOODS - BILLING", "761 BEACON - NEWTON CENTER", "L-1 OAK ON ELM - MANCHESTER", "ALVAREZ, CARLOS", "10 CENTER STREET RESTAURANT", "10 PRIME STEAK & SUSHI", "ARCE, RAFAEL", "10 VEN - HAWTHORPE", "ALESSE, MATTHEW", "11 CIRCUT - OAK BLUFFS", and "100 CONGRESS".

Code	Customer Name	Telephone	Last Sale	Open Order \$	Last Pmt.	Open A/R \$	Status
1000	Use for Testing		05/20/21	.00		.00	I
10000	45 STRAWBERRY HILL "RTL"	978-263-3325	04/20/07	.00		.00	A
10001	MICHAEL DIMAMBIRO		09/03/20	.00		.00	I
10006	CERABONE ROY		12/22/22	.00		.00	A
10007	NATALIA ABRAM	617-913-2725	08/18/22	.00		.00	A
10008	JASON HOLT		05/05/22	.00		.00	I
1001	ACOSTA, PAMELA	978-807-2826	04/28/20	.00		.00	I
10010	L-7 WINTER GRILLE	415-443-4516	03/27/15	.00		.00	G
10011	KATIE NOTARTOMASO	603-557-6909	07/20/23	.00	07/21/23	.00	A
10012	EATON, MELANIE	617-901-2599	05/13/21	.00		.00	I
10013	75 HAYDON - EDWINGTON	508-472-9504	04/25/23	.00	05/03/23	.00	A
10014	C-743 KITCHEN - CLIFTON PARK	518-375-2307	03/17/23	.00		.00	A
10015	7A FOODS	508-939-1710	07/25/23	1,232.75		.00	A
10016	7A FOODS - BILLING	508-693-4636	07/25/23	1,232.75	07/13/23	5,708.98	A
10017	761 BEACON - NEWTON CENTER	774-563-0128	06/18/19	.00		.00	A
10018	L-1 OAK ON ELM - MANCHESTER	603-206-5599	02/25/16	.00		.00	G
1002	ALVAREZ, CARLOS	978-305-5175	02/07/18	.00		.00	A
10020	10 CENTER STREET RESTAURANT	978-462-6652	06/12/14	.00		.00	I
10025	10 PRIME STEAK & SUSHI		03/17/23	.00		.00	A
1003	ARCE, RAFAEL		03/17/23	.00		.00	A
10030	10 VEN - HAWTHORPE	774-722-2833	12/27/19	.00		.00	A
1004	ALESSE, MATTHEW		06/11/22	.00		.00	I
10040	11 CIRCUT - OAK BLUFFS	508-687-9283	07/14/23	.00		716.15	A
10050	100 CONGRESS	207-775-7772	03/17/23	.00		.00	A

- When hitting ENTER the total Account List for this rep will come up in numerical order. Already here this brings you to some fantastic info. Account Name / Phone Number(make sure its up to date!) / Date last Sale / Open Orders / Last Payment Date / Total AR and then whether they are ACTIVE or ON HOLD

Code	Customer Name	Telephone	Last Sale	Open Order \$	Last Pmt.	Open A/R \$	Status
24774	GILLETTE CROSS CATERING	508-543-0350	12/29/21	.00	07/26/23	38,476.82	A
24775	GILLETTE CATERING	508-543-0350	07/27/23	.00	07/26/23	6,658.97	A
24776	GILLETTE REVOLUTION	508-543-0350	07/26/23	.00	07/26/23	38,476.82	A
24777	GILLETTE PLAYER DINING	508-543-0350	07/27/23	3,889.41	07/26/23	57,879.13	A
24778	GILLETTE KRAFT FAMILY	508-543-0350	07/25/23	.00	07/26/23	4,266.23	A
24779	GILLETTE SUITES	508-543-0350	07/27/23	5,370.00	07/26/23	9,163.36	A
24780	GILLETTE SEA	508-543-0350	03/28/23	.00	07/26/23	392.95	A
24781	GILLETTE PUTNAM	508-543-0350	12/30/22	.00	.01	.01	A
24782	GILLETTE OPTUM	508-543-0350	12/30/21	.00	.00	.00	A
24800	GILLETTE CONCESSIONS	508-549-0429	07/24/23	183.84	07/26/23	6,406.78	A

- At this point CLICK on the OPEN ORDER header twice and it will bring all of your OPEN ORDER to the TOP of the list. So you can see who's got orders in. GREAT tool here is to then look at those just under here, last order date and use as a guide for who you must call to PUSH into an order.

Code	Customer Name	Telephone	Last Sale	Open Order \$	Last Pmt.	Open A/R \$	Status
24779	GILLETTE SUITES	508-543-0350	07/27/23	5,370.00	07/26/23	9,163.36	A
24777	GILLETTE PLAYER DINING	508-543-0350	07/27/23	3,889.41	07/26/23	57,879.13	A
24800	GILLETTE CONCESSIONS	508-549-0429	07/24/23	183.84	07/26/23	6,406.78	A
24774	GILLETTE CROSS CATERING	508-543-0350	12/29/21	.00	.00	.00	A
24775	GILLETTE CATERING	508-543-0350	07/27/23	.00	07/26/23	38,476.82	A
24776	GILLETTE REVOLUTION	508-543-0350	07/26/23	.00	07/26/23	6,658.97	A
24778	GILLETTE KRAFT FAMILY	508-543-0350	07/25/23	.00	07/26/23	4,266.23	A
24780	GILLETTE SEA	508-543-0350	03/28/23	.00	.00	392.95	A
24781	GILLETTE PUTNAM	508-543-0350	12/30/22	.00	.01	.01	A
24782	GILLETTE OPTUM	508-543-0350	12/30/21	.00	.00	.00	A

- To explore ALL activity of a given account click on it to highlight it BLUE. When you do this you will see that the menu in the left column will expand to Include: ORDERS, QUOTES, NOTES, PROFILE, OPPORTUNITIES and CONTACTS

Code	Customer Name	Telephone	Last Sale	Open Order \$	Last Pmt.	Open A/R \$	Status
24779	GILLETTE SUITES	508-543-0350	07/27/23	5,370.00	07/26/23	9,163.36	A
24777	GILLETTE PLAYER DINING	508-543-0350	07/27/23	3,889.41	07/26/23	57,879.13	A
24800	GILLETTE CONCESSIONS	508-549-0429	07/24/23	183.84	07/26/23	6,406.78	A
24774	GILLETTE CROSS CATERING	508-543-0350	12/29/21	.00	.00	.00	A
24775	GILLETTE CATERING	508-543-0350	07/27/23	.00	07/26/23	38,476.82	A
24776	GILLETTE REVOLUTION	508-543-0350	07/26/23	.00	07/26/23	6,658.97	A
24778	GILLETTE KRAFT FAMILY	508-543-0350	07/25/23	.00	07/26/23	4,266.23	A
24780	GILLETTE SEA	508-543-0350	03/28/23	.00	.00	392.95	A
24781	GILLETTE PUTNAM	508-543-0350	12/30/22	.00	.01	.01	A
24782	GILLETTE OPTUM	508-543-0350	12/30/21	.00	.00	.00	A

- Click on ORDERS:

Contact Management

Exit Clear Inquiries Calendar

Prospects Customers Suppliers

Salesperson Code: 14 KRAFT LLC Code: 24779 GILLETTE SUITES

Buyer Code: Primary Contact: BRAD OZERDEM

Broker Code: Telephone: (508) 543-0350

Account Mgr. Code: E-Mail Address: BRAD@GILLETTESTADIUM.COM

Keyword:

Code	Customer Name	Telephone	Last Sale	Open Order \$	Last Post	Open A/R \$	Status
24779	GILLETTE SUITES	508-543-0350	07/27/23	5,370.00	07/26/23	9,143.36	A
24777	GILLETTE PLANTER OWNERS	508-543-0350	07/16/23	3,869.41	07/16/23	97,899.15	A
24800	GILLETTE CONCESSIONS	508-549-0429	07/24/23	183.84	07/26/23	6,406.78	A
24774	GILLETTE CROSS CATERING	508-543-0350	12/29/21	.00	.00	.00	A
24775	GILLETTE CATERING	508-543-0350	07/27/23	.00	07/26/23	38,476.82	A
24776	GILLETTE REVOLUTION	508-543-0350	07/26/23	.00	07/26/23	6,658.97	A
24778	GILLETTE KRAFT FAMILY	508-543-0350	07/25/23	.00	07/26/23	4,266.23	A
24780	GILLETTE SEA	508-543-0350	03/28/23	.00	.00	392.95	A
24781	GILLETTE PUTNAM	508-543-0350	12/30/22	.00	.00	.01	A
24782	GILLETTE OPTUM	508-543-0350	12/30/21	.00	.00	.00	A

Orders Quotes Notes Profile Opportunities Contacts Inventory Literature

- This will open a FULL list of all orders in the system for this account and allow you to double click a specific order which will open it in EDIT mode and you can edit and add to that order quickly and easily.

Sales Orders

Exit New Document

Totals: 4 \$5,370.00

Doc #	Ship Date	Doc Date	Name	PO Number	Value	Cost
121480	07/26/23	07/26/23	GILLETTE SUITES	18915	456.00	605.28
121482	07/26/23	07/26/23	GILLETTE SUITES	18912	901.34	1,379.54
121484	07/26/23	07/26/23	GILLETTE SUITES	18919	344.83	413.98
121584	07/27/23	07/27/23	GILLETTE SUITES	18942	2,784.00	2,971.20