Dimensional INSIGHT®

◤ Diver Platform®

Why upgrade to Program Advisor 4.0?

Turbocharge Your Sales by Using Data to Make Better Decisions

Program Advisor is quickly becoming Dimensional Insight's most popular product for the beverage alcohol industry. By getting a handle on what is going on with programs throughout the enterprise at any given moment, users find Program Advisor to be mission-critical to achieving company goals.

Here are some frequently asked questions about Program Advisor.

➤ What is Program Advisor?

Program Advisor is an enterprise-wide sales application. Individuals in every part of the company can have access to crucial role-based information. This role-based information helps individuals improve their sales process, which leads to efficiencies, time-savings, and increased profitability.

➤ Why should I upgrade?

The #1 reason to upgrade is speed. Built on Diver Platform 7.1, version 4.0 of Program Advisor leverages Spectre, the columnar database that returns queries at a lightning-fast speed.

There are also numerous other improvements that we list on the backside of this document.

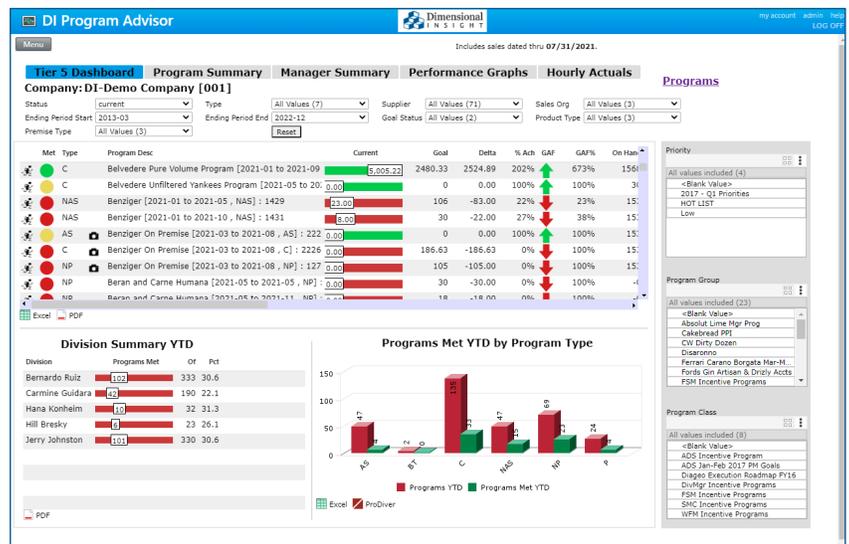### ➤ What types of programs are handled by Program Advisor?

Program Advisor assists with goals, promotions, incentives, and blitzes.

➤ What types of users can use Program Advisor?

Employees use Program Advisor at every level of the company: support staff, sales reps, and managers. Everyone works with centralized information about all of their programs for decisions based on current information.

➤ On which devices can I use Program Advisor?

Program Advisor is available on desktop computers, laptops, and Apple iOS tablets and phones. Now you can check your program results at any time of the day, inside and outside the office.

Enhancements included in the 4.0 Release

General:

1. The entire application has been converted to run using the Diver Platform version 7.1 and Spectre. This conversion brings a significant improvement in speed and functionality across many areas of the application.

2. Program Advisor results are now available on both the iPad and the iPhone. Now you can check your program results at any time of the day, inside and outside the office.

3. Survey Advisor has been integrated with Program Advisor. You can now make programs dependent on required photography uploaded to a survey completed within Survey Advisor.

4. For any programs that have ended but have not yet been archived, our back-end processing has been enhanced so that the currently responsible sales rep and associated customer/product responsibility will remain as they were at month-end. Sales and product organization changes that occur after month-end will no longer impact programs that have ended but have not yet been archived.

5. You can now control top to bottom scrolling on windows via the wheel on the mouse. Using the mouse wheel dramatically improves the speed of scrolling and is helpful when looking through a large amount of information.

Edit Programs Browse Screen

1. A new option has been added so that you can make multiple copies of a program simultaneously (up to 10). In earlier versions of Program Advisor, you could only make one copy of a program at a time.

2. A camera image has been added to the edit program listing. This image appears next to any program that has survey picture requirements from Survey Advisor.

Program Header/Setup Screen

1. The Edit Programs page now has a new look and feel. There is a new design for the Edit Programs Form and the program filter buttons.

2. A new option has been added to the Program Minimum screen. You can now specify that specific labels, sizes, brands, or items are mandatory and required for the program. If the account doesn't purchase the needed products, then none of the sales to that account will count towards the program.

3. A new Program Limits option has been added to the current Brand Limits screen to designate limits for the entire program. The current Brand Limits option only allows limits by brand. This new

option will enable you to place overall limits for the whole program as well as by brand. The Brand Limits button is now called Program Limits.

4. We have added the ability to do Placements by Program Group.

5. A new entry field has been added to the Program Header screen to enter the program's estimated program costs. These estimates will be used in future reporting to show actual versus estimated costs (split by On-Premise / Off-Premise).

6. A new option has been added to the Combo selection to include only combo sales and exclude regular sales. This option will allow you to track only the sales completed as part of a combo.

7. A new Survey Filter button will allow you to connect a program to a set of Survey Advisor questions and responses. Initially, this will be for survey pictures. In the future, we will support all survey responses. Accounts omitted from survey results do not contribute to program sales for that account.

   a. On the Dashboard, a camera icon appears next to programs with picture requirements.

   b. On "Show Customers," an indicator appears next to each account with program pictures completed.

8. A new option has been added to the program filters (products, basis products, sales reps, and customers) so that the end-user can now upload filter files from their PC directly into the application.

➤ Program Payouts

1. The Payout Per selection option on the payout screen has been expanded to include Per SKU and Per Size. Now you can do payouts based on the number of SKUs sold and the number of sizes sold.

2. The Sell Units option on the payout screen now includes Invoices.

3. Identifying a program update in progress is easier now that the Program Description, Program ID, and Segment ID appear at the top of the Payout Screen.

4. We have added the ability to filter products on the payout screen. You can now define a payout based on a subset of the products included in the overall program. For example, a program could be tracking all products for supplier 123, but you only want to pay out $5 per case for just the 50ml products or just $3 per case for brand X.

5. The "into the same account" section now offers an option to limit payouts to only qualified sales. You might use this option if you are tracking placements and you want to pay out for additional cases sold only as part of that placement.

DiveTab — □ ✕

Program Listing | **Menu**   Program Desc: Benziger On Premise [2021-03 to 2021...

Program Desc	salesrep_tier_5	Segment ID
Benziger On Premise [2021-03 to 2021-08 , C] : 2226	DI-Demo Company [001]	2226

Program ID	118	Customers	3,270	Created By	mbrockway		
Program Period	2021-03 to 2021-08	Chains	49	Created At	2020-09-10		
Goal Period	2020-03 to 2020-08	Brands	1	Last Updated By	DSabio		
Buy Period	N/A to N/A	Products	64	Last Updated At	2020-10-01		
No-Buy Period	2020-01 to 2020-12	Sales Reps	105	Goal Specs:			
Program Specs:		Program Report		Goal Type	Percentage Increase		
On Premise: Min.	2 Cases	Program Analyzer		Goal Value	10		
Off Premise: Min.	Cases	Customer Prod Detail		Minimum Goal	5		
Min. Criteria	By Account	Salesrep Prod Detail		Entire House Indicator	N		
Case Definition	9L Cases	Free Goods & Samples	remove	Min. Tier	Tier 1		
Returns	include	Cases Only	All	Program Priority	N/A		
Initial Order Only	N	Placement Level	Item	Program Group	N/A		
		Combo Definition	Detail only				

ID	Product Filter
111	include product_supplier=THE WINE GROUP [057],product_brand=BENZIGER [06069]

ID	Customer Filter
13	include customer_premise=On Premise

➤ Dashboards

1. The Entire House Indicator and the Program ID are now part of the Show Program Info screen.

2. The current Manager Summary tab on Tier 5, Tier 4, Tier 3, and Tier 2 dashboards has been replaced with a new Manager Summary report. Now the manager can see all of their programs across all of their direct reports simultaneously on one report.

   a. The new report is a program cross-tab report for the manager, showing programs going down and each of the manager's direct reports going across.

   b. The Goal, Current Sales, and Delta now show for each program/direct report.

3. The product on-hand, on-order, and last order date are on dashboards. The Show Products screen displays On Hand Amount, On Order Amount, and On Order Date next to each item in the program.

4. The last updated sales date has been added to most dashboard screens so that users will know the most recent date for sales included in Program Advisor.

5. Dashboards have a new Show Sales Rep Product Details report. It is similar to the Show Customer Product Details report, except that it shows Sales Reps going down the left side of the report and Products going across.

6. 6. The Program Detail Report now shows the total number of sales reps that are ranked. This way, a rep can see the total number of reps against which he ranked.

7. 7. A camera image has been added to the dashboard program listing. This image displays next to any program that has survey picture requirements from Survey Advisor.

➤ Edit Goals

1. The performance has been dramatically improved on the main Edit Goals screen. Now the Edit Goals screen displays in a matter of seconds.

2. A new option has been added to the import goal overrides so that the end-user can now upload the goal override files from their PC directly into the application.

➤ Security

A new option has been added to the security processing so that the system administrator can control whether users need to change their password during their first log-in into the application.