A-Line Atlantic Inc.
43 Maple Valley Rd.
Corner Brook, NL A2H 6T3
Tel: 1-800-790-1280 Fax: 1-800-771-7633
Email: customerservice@ALineGreetings.com
Website: www.ALineGreetings.com

Entering new customers online

When you log in to the CRM form, select new customer wizard

- Here is a link to the CRM form: http://crm.aline.ca/
- To begin your process, choose the new customer button, a temporary customer number will be assigned to that customer's file – you should record this number in case your entry is interrupted

Please note that this will not be their Aline customer # in our database once the account has been completed.

Any where that you see a box with a drop down arrow (see below)showing you have to select the down arrow and choose from one of the menu options. You should not be typing information into these fields as it will cause an error when the account is merged into our live database.

Please use all caps when entering new customer information

Customer Trade Name is the actual name of the store.

Legal or billing name is sometimes different from the trade name. If it's the same then you can copy and paste the trade name into the legal name field. This information will be located on their completed NCIF form.

Parent Company – be especially careful with this one as this will determine who the account is affiliated with. If you are ensure what to pick it's better to leave this field blank rather than "guess" at it. There is a selection further in the wizard which allows you to enter existing accounts for this owner.

Parent Store Number - do not enter a number sign in this field, just numbers only.

Customer Category – categorizes what type of store we are opening, (i.e. dollar store, pharmacy etc).

Address and Billing information
Address 1 – this should be used for actual street location.
Address 2 – this is where additional information like "west side mall" or PO Box should be entered.
If the store only has PO Box # and no exact street address then the PO Box info should be entered in the Address 1 field.
Town/City, Postal/Zip - should be standard.

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Country - we have you select the country before the province or state as this will define what provinces or states will be available from the drop down menu on the next field.

Billing Address Same? If the store is being billed directly select "yes". This will grey out all other fields so that information cannot be entered.

If the store is being billed through HO location please enter that information into this section.

Telephone Numbers:
It is very important that we collect and input as much contact information as possible including contact names and email addresses.

Sales information:
Ship location - stores that are shipped from the US should have Port Huron selected. Stores located from QC to BC and French speaking NB should have Brantford selected. All other stores should have Corner Brook selected.
PST Exemption- enter only if the customer is located in BC.
Tax Number – GST/HST number should be entered here.
IRS # - For US customers only, also called Federal Tax Id on the NCIF.
# of invoices – This will determine how many invoices are put in the box when each order ships
# of packing slips – this will determine how many packing slips are put in the box when the orders ships.

Please note if nothing is entered in the # of invoices or # of packing slips the customer will not receive any documentation included with their orders.

NCIF submitted – You are still required to fax or email a copy of the customer's NCIF to the office along with a Credit Card authorization is applicable and the new "REVISED" display fixture order form.
Present Supplier – Present supplier is a field that we use to track where new stores are coming from, it shows possible areas that competitors might be having problems in.

Opening order Credit – needs to be noted if we are doing , free fills, 50% off opening order for ED product, $100/ft. Max Buyback of $1000, etc.
Contract Required – A contract is required if an opening order credit is being completed. The only time that this will not be accurate is if the customer is part of a large chain and the credit is covered by the Head Office agreement.

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Rebate – The box to the left needs to be selected to show what product is receiving the rebate, the percentage needs to be entered in the box before quarterly. Then the frequency of rebate needs to be entered (quarterly, annually or rebate schedule).

Here is a copy of our standard rebate schedule:

$ 5,000 to $9,999	**2%**
$10,000 to $14,999	**4%**
$15,000 to $19,999	**6%**
$20,000 to $24,999	**8%**
$ 25,000 plus	**10%**

Rebate schedules are paid out within 45 days of the end of the calendar year.

Please note that there is a selection for self-service rebate, this should be kept to a 4% minimum.

Product Type / Pricing – Choose the correct selection for what the new store is selling (MB, RD or RG), ***we do not want pricing entered for RD or RD Gold if the store is only taking MB product and vice versa. You don't need to enter a $ in front of the pricing.***

Planogram requirements – Select product type from the drop down list, select type of product from the secondary list, next enter number of feet and tiers when you press "TAB" the number of pockets will update. Then select the add button to move it to the gird below. At any time you can choose a record and select remove to take it from your list.

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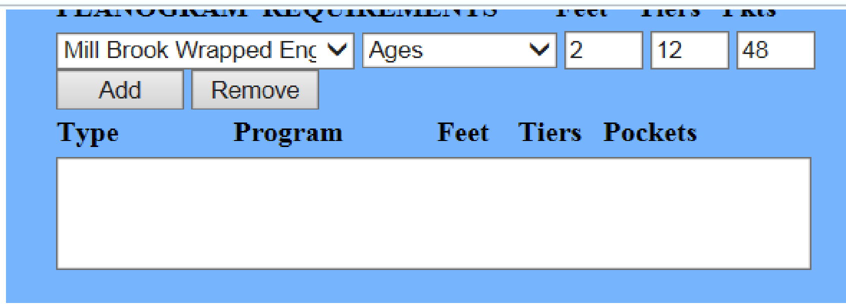

This section is not only for Everyday and Theme product, this is also for seasonal. There is an additional notes section at the end of the wizard if you want to include notes regarding the planograms like, with ages, without ages etc. This additional notes/specific planogram requirements section can also be used for extra information regarding the seasonal section.

After the planograms are entered you should select either:
Order 1 pack per pkt
Ship the difference
No product required. – Additional notes should be entered to explain this further.

When entering seasonal for integrated sections the seasonal needs to be broken down by card type. For example, a store taking $1 & $2 integrated the section is normally 50% MB and 50% Rosedale. If the seasonal section was 4', the under Mill Brook Wrapped English you would select seasonal in the second drop down window entering 2' and the number of tiers and then you would select Rosedale Unwrapped English and enter 2' for footage and the correct number of tiers.

For stores taking Easy as 1,2,3 program they would follow the same format as the integrated stores when entering their seasonal.

Set up -
To be completed by: this is not a date field, this should advise the person who's completing the set up in store.
Ship to Arrive: when product and/or racks should arrive in the store, this should be a max of 2-3 days before the actual set up date.
Suggested Set up Date: Time for the set up to be completed in the store.

Fixtures:

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Select fixtures from the drop down menu, enter the qty and select add. At any time you can choose a record and select the remove button to take a rack from the list.

Fixture Agreement: choose from one of the four selections

Signage Requirements: choose the retail from the drop down menu. In the box below you can write any additional notes required for signage (i.e. if you require extra signage or specific signs being requested).

Additional Requirements: select if you require divider clips, copies of planograms or scan labels.

Additional Notes/Specific Planogram requirements: this should house any notes that you were not able to enter anywhere else on the wizard, planogram requirements, note regarding seasonal, etc.

Save Customer: Selecting this button will save the customer information so that you can still access it to add more information or complete the requirement. This will not send the information to the Field Operations department that there is a new customer. You can gain access to this customer once the screen is closed by using the Temporary Customer number that you received at the beginning of the set up.

Please note that you must select save customer before you select customer complete. If you do not hit save customer first, the information that has been entered will not save to the database.

Customer Complete: Selecting this button will automatically send an email to the Field operations department that a new account has been entered. It will lock the account from being edited on your end. You can no longer access this account by using the Temporary Customer number.

Once the information is reviewed and the customer is merged into the Aline database, a 5 digit Aline customer number will be assigned to that customer.

Documents to be submitted to the office: Once you have completed the customer and the email is generated, you will now need to email or fax the following documents to the office to have the paperwork processed: New Store Floorplan Layout (this is required for every account regardless of whether they have a planogram or not), New Customer Information Form, Fixture Loan Agreement(if applicable) and Credit Card Authorization.

To find a customer already started and saved:

Enter the Temporary Customer # and select the find button, any information already entered will be displayed.