MYBUSINESS-ACTION ITEMS

FEATURE SUMMARY:

My Business Principal Distributors will now be able to message their location operator employees in the MyBusiness App. This feature is an excellent way for principal distributors to choose to communicate with a location operator about a specific store they sell to in their business.

There are 3 categories of messages/action items. When an action item is created by the principal, it will go into the "Active" folder. When the LO completes a task and replies back to the principal, the action items is classified as "Unread." When the principal reads the response, the item will move to the "Completed" folder. Store Action Item workflow is detailed below, however, process is identical to the Order Action Item. The main difference is that instead of selecting a store to apply the action item to, a principal can select a specific order night or "All Future Orders." If they select "All Future Orders" the action items will show up when viewing any current or future order. If the Location Operator responds to the action item on one of the orders, it will be removed from all of the orders.

From the home screen, tap "Principal." Then tap "Action Items." Tap a location to message.

54100 Home		e Principal	_8	📲 Sprint 🗢	9:19 AM	1 92% 🔳
				Principal	Action Items	=
Sales Transaction		Action Items		Location		Unread
Sales Setup		Custom Location Cost		54100		1 >
Inventory		Location Alerts		54211		0 >
Orders		Permissions		64210		0 >
Paparte	\exists \vdash	Fermissions		64212		0 >
	_ L	Insurance				
News		Store Mover				
Financials		Warehouse Inspection				
Lumper						
Principal	7					
	-					

1. To begin, tap "New Action Item." Select the type of message and then tap "Next.

Sprint 🗢 4:09 PM	⋪ 26% 💭	12:38 🕫	ati lite 🔳
Action Items Action Items	=	Action Items Select Typ	e Nov
Active	^		
Sunbelt VALMART SUP 4166	>	Store	S
nread Responses	^	Order	0
unbelt /ALMART SUP 4166	>		
Now Action Itom			



2. The principal can then tap the store to send an action item for that specific store and then tap "Next." Enter a title and then a message, then tap "Save."

🛯 Sprint 🗢	4:23 PM	♥ 20%	••I Sprint 🗢 9:22 AM 🕫 92% 🗖
Select Type	Select Store	Next	Select Store Action Item Details
O ALLENS 7-1 Vonore Rd, Swe	1 etwater, TN 37874	$\overline{}$	* Title
O BELLAMY'S 314 Bennett Str	eet, Sweetwater, TN 37874		Out of code
CIRCLE K 36 410 E North Str	524 eet, Sweetwater, TN 37874		* Message
O CIRCLE K 36 1157 Hwy 68, S	026 weetwater, TN 37874		Store manager says remove out of code product.
O CIRCLE K 36 708 South Main	527 St, Sweetwater, TN 37874		
OOLLAR GE 789 Hwy 68, Sv	N 113 veetwater, TN 37874		
O DOLLAR GE 113 Glenlock Rd	N 16314 , Sweetwater, TN 37874		
C EXPRESSW/ 243 Hwy 68, Sv	AY MART veetwater, TN 37874		I I'm The
O FUEL STOP 203 New Hwy 6	8, Sweetwater, TN 37874		1 2 3 4 5 6 7 8 9 0

3. The location operator will see the message initially as a blue bar at the top of the store information page. When the blue bar is tapped, the action item will open. Tap the right-facing chevron, and a response box is opened to reply back to the message. Tap "Done" to submit a response to the principal.

📲 Sprint 🗢 4:11 PM	A 25% 💽	ull Sprint 중 4:11 PM	A 25% 💽	🖬 Sprint 🗢	4:12 PM	\$ 24%
Select Store Store Info	≡	Select Store Store Info	=	Store Info	Action Item	Done
		Out of code	0			
DOLLAR GEN 113 789 Hwy 68, Sweetwater, TN	\$	Store manager says remove out of code product.	0	Title Out of code		
Central Billing Store		DOLLAR GEN 113 789 Hwy 68, Sweetwater, TN	\$	Message Store manager	says remove out of code p	product.
View Sales History	>	Central Billing Store		Your Respons	e	
Store Messages		View Sales History	>	Done!		
No recent messages.		Store Messages				
Special Pricing		No recent messages.				
None		Special Pricing				
Change Special Pricing		None			l'm	The
Promotions		Change Special Pricing				

4. The principal distributor will be able to view any communication in the Action Items menu option under unread messages or completed.

🖬 Sprint 🗢	4:34 PM	19% 🚺
Action Items	Action Item	=
Title		
Out of code		
Message		
Store manager s	ays remove out of code	e product.
When Completed		
03/03/2021 04:1	2 pm	
Response		
Done!		