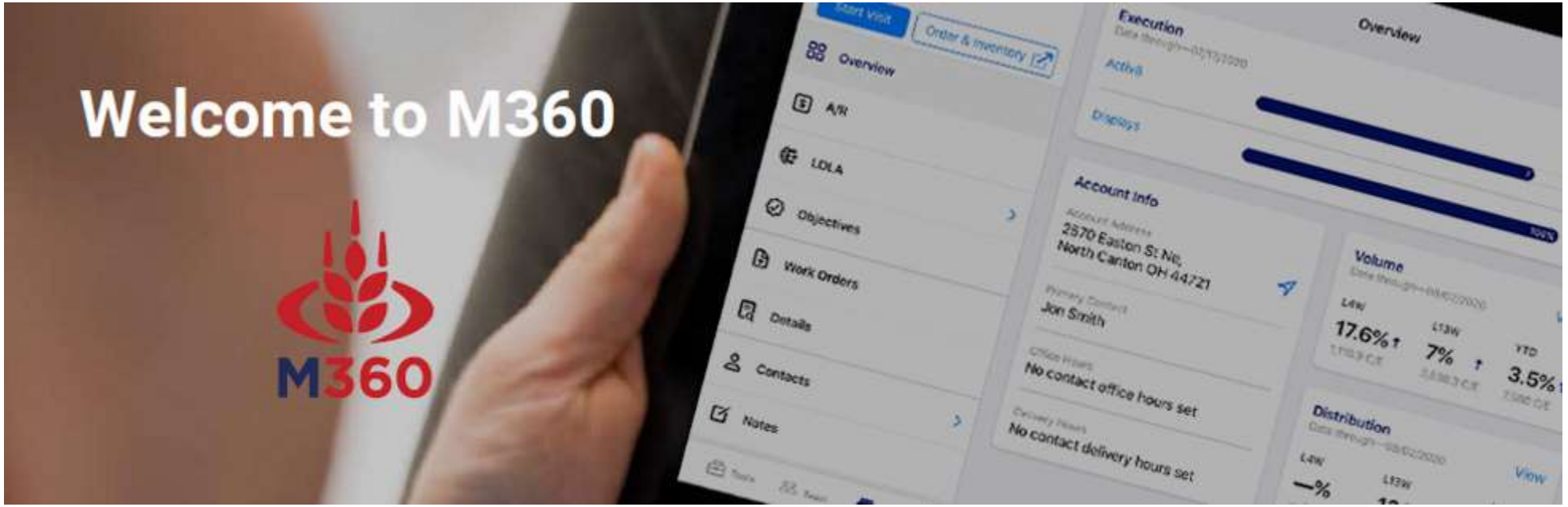



# Migrating to M360 in unison with Encompass

# PLATFORM FEATURES

- SRI, Volume, and WJBP information updated at least 3x/week
- Visibility into incentives so you have the information to achieve your goals

- Wholesaler and chain planogram visibility via SPP/PMT and KAM
- Markup and share planograms to quickly close gaps

- 13% average increase in re-buy rate with LOLA recommendations.
- YTD in 2020, LOLA re-buys have resulted in $3.5MM in incremental revenue for active M360 Wholesalers!

- Personal KPI visibility for Team Leads
- Quick navigation between team member routes
- Aggregated team data

- Seamless integration with ordering and inventory through VIP
- Live warehouse inventory
- Customizable view and set-up
- Edit BEES orders

- Sell sheets, UPCs, brand, regional, and content all in one place
- Private wholesaler folder, ability to set up automatic sync agent

- Collect and customize contact information and notes for accounts
- TLs can add notes for teams
- Great for relief reps reference

Azure

enables single sign-on between

M360

and

ENCOMPASS

- Log out of Encompass.
- Enter username and password.
  - Do NOT press the Login button.
  - Be sure you know your credentials
- Press the Azure logo to complete the login process.

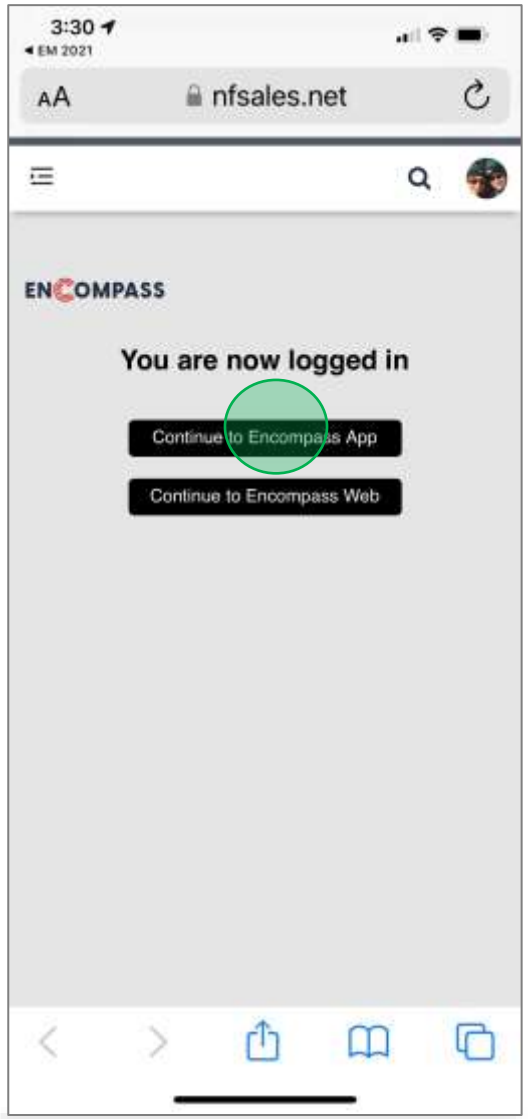
Azure

enables single sign-on between

M360

and

ENCOMPASS




SELECT:

- Continue to Encompass App

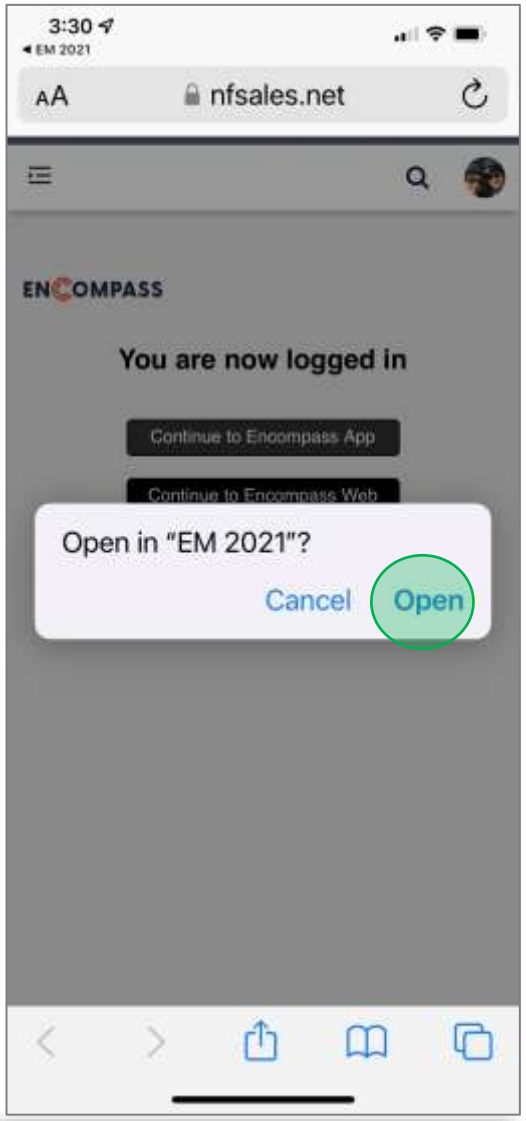
Azure

enables single sign-on between

M360

and

ENCOMPASS




- Click: Open

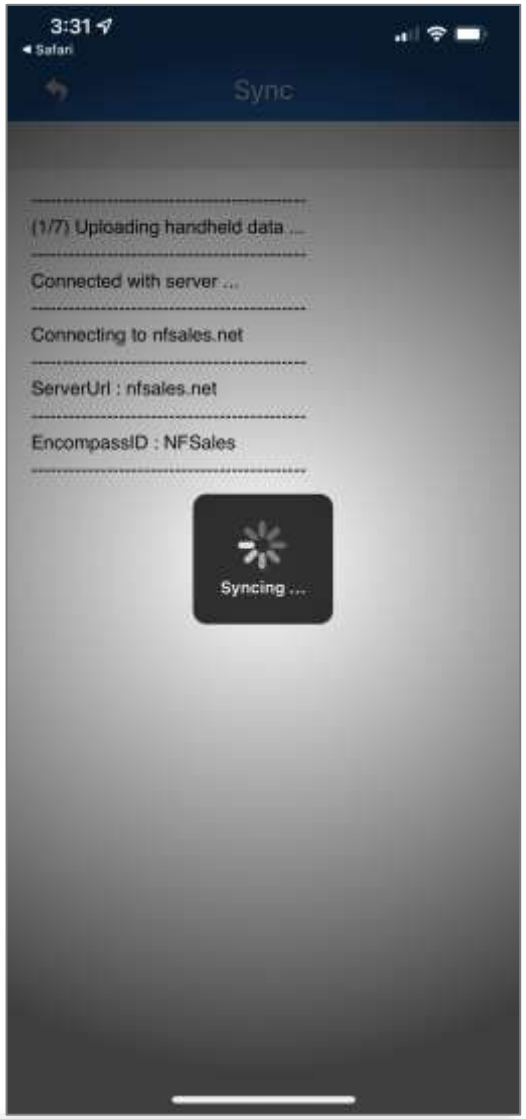
Azure

enables single sign-on between

M360

and

ENCOMPASS




- Your mobile device will automatically start syncing.

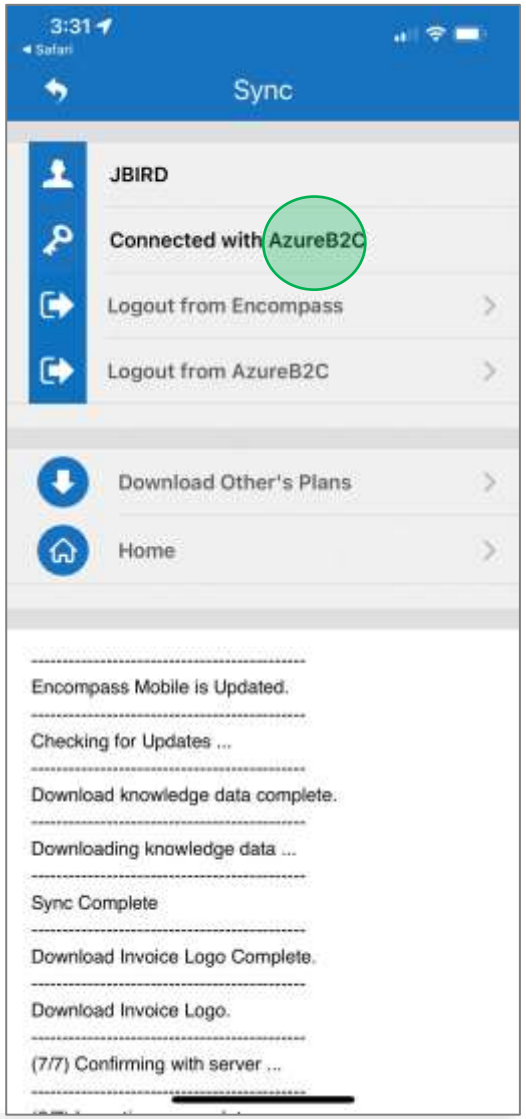
Azure

enables single sign-on between

M360

and

ENCOMPASS




- This indicates you are logged into Encompass via Azure.

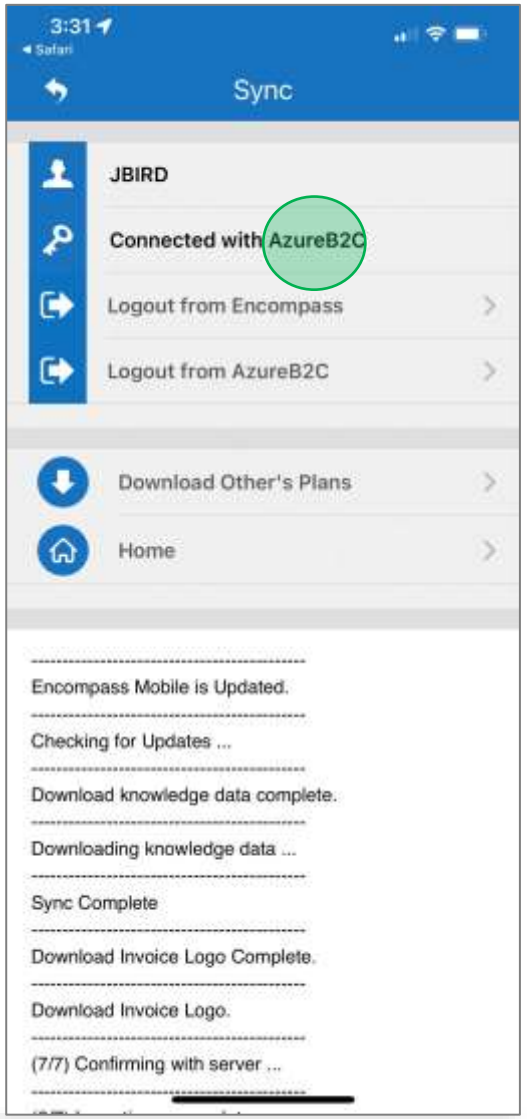
Azure

enables single sign-on between

M360

and

ENCOMPASS




- This indicates you are logged into Encompass via Azure.
- Close the Encompass app after it has finished syncing.

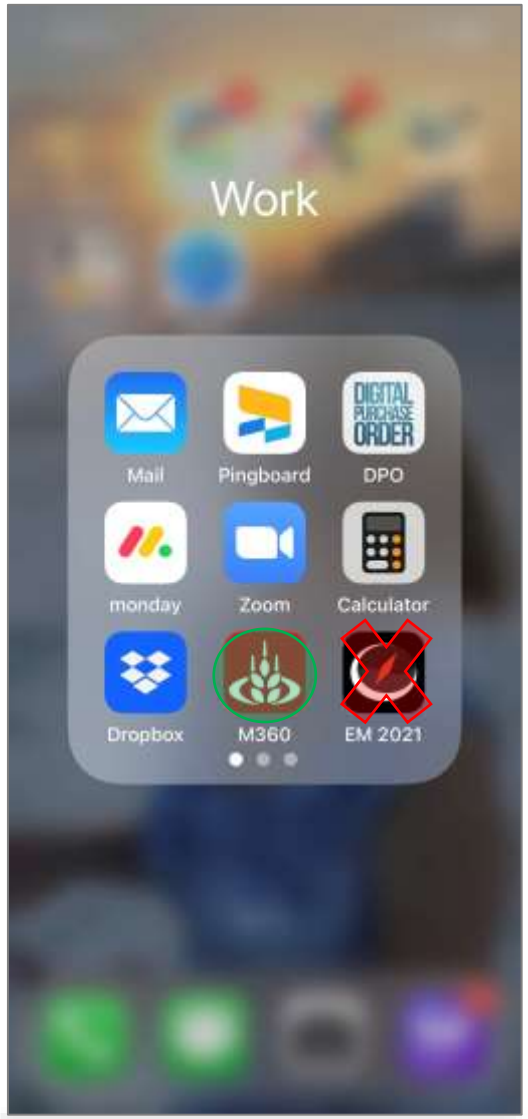
Azure

enables single sign-on between

M360

and

ENCOMPASS




- Open the M360 app.

- The Encompass mobile app should be closed.

Azure

enables single sign-on between

M360

and

ENCOMPASS

- Open the M360 app and click to Login

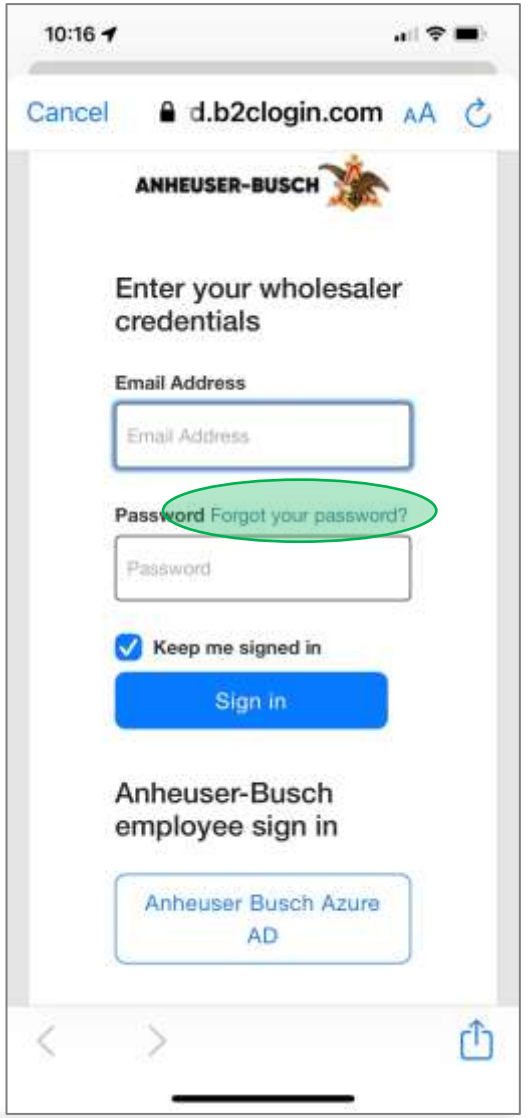
Azure

enables single sign-on between

M360

and

ENCOMPASS




- Enter your credentials.
  - Username = email
- Use the ‘Forgot password’ link if you do not have it available.
- ‘Forgot your password’ will prompt a reset password link being emailed to you.

Azure

enables single sign-on between

M360

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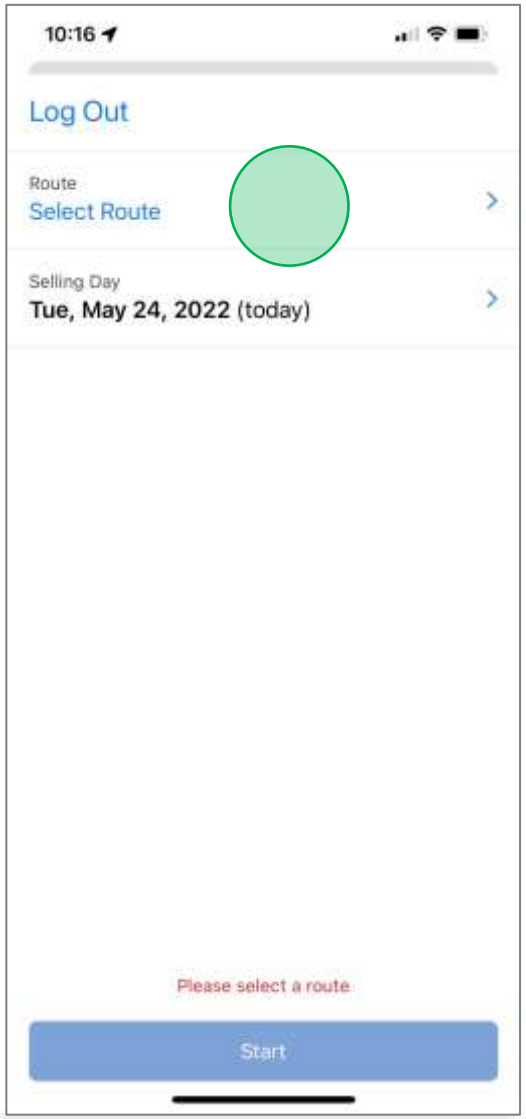
ENCOMPASS




After a successful login:

- Click to Select Route.

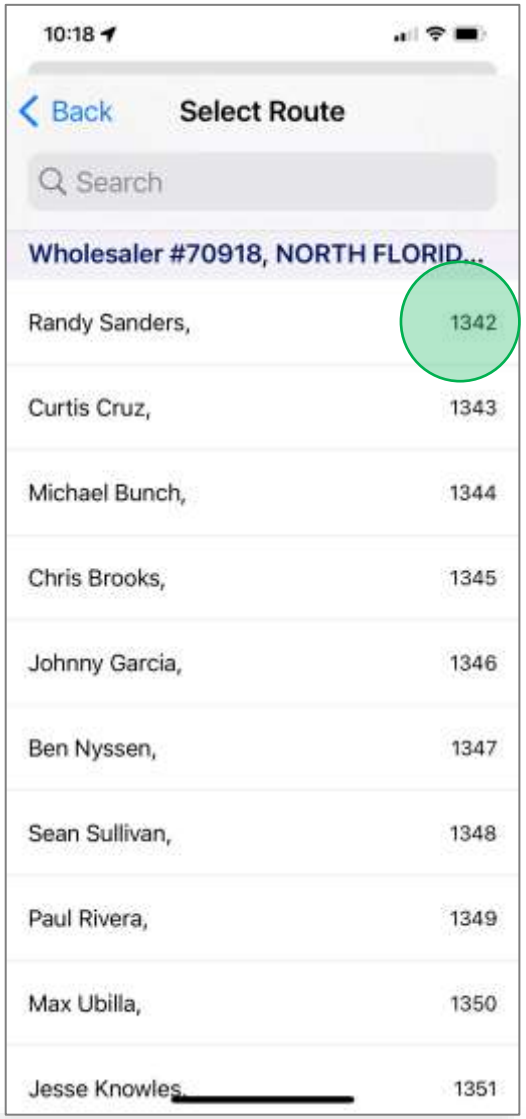
Azure

enables single sign-on between

M360

and

ENCOMPASS




- Select Route.
  - Demo = 1342

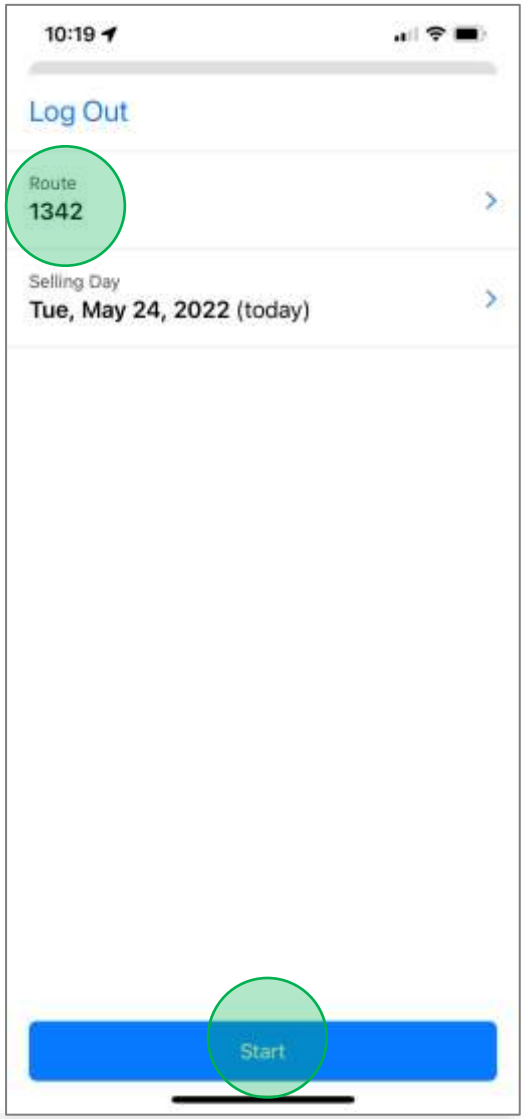
Azure

enables single sign-on between

M360

and

ENCOMPASS




- Demo = 1342.
  - Verify correct route number.
- Click Start

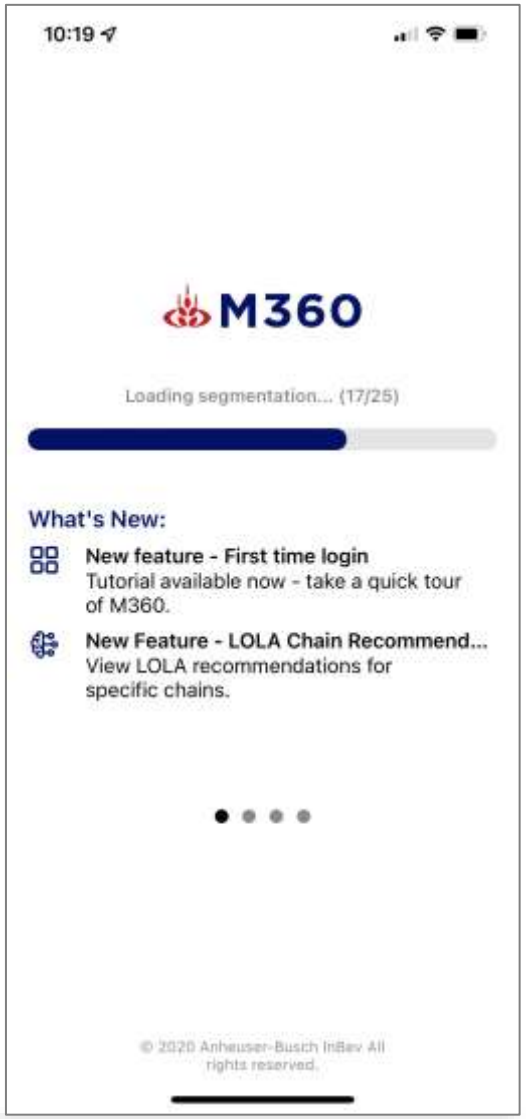
Azure

enables single sign-on between

M360

and

ENCOMPASS




- M360 will download information pertaining to your login and route number.

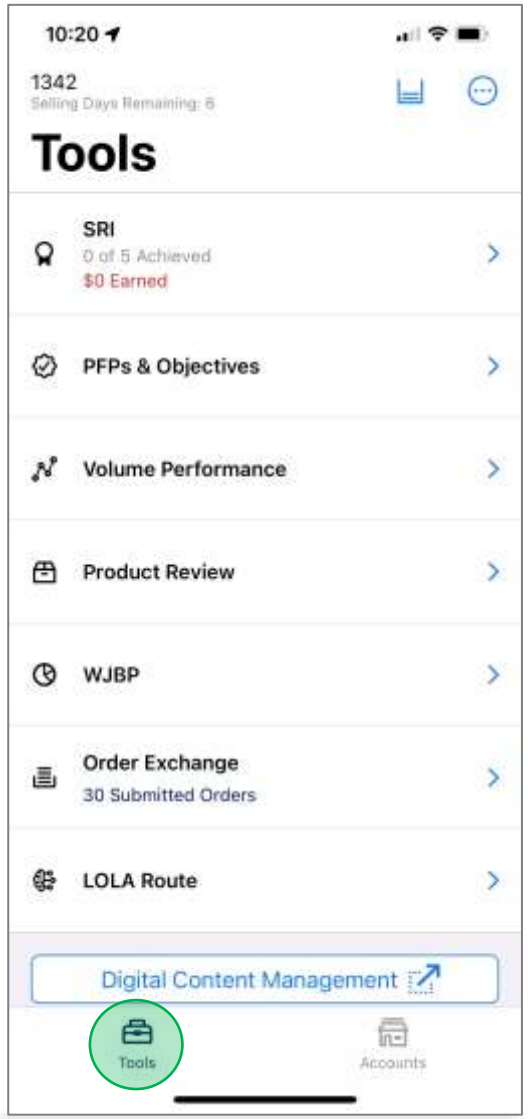
Azure

enables single sign-on between

M360

and

ENCOMPASS




- The tools menu is accessed via the Tools icon at the bottom of your screen.

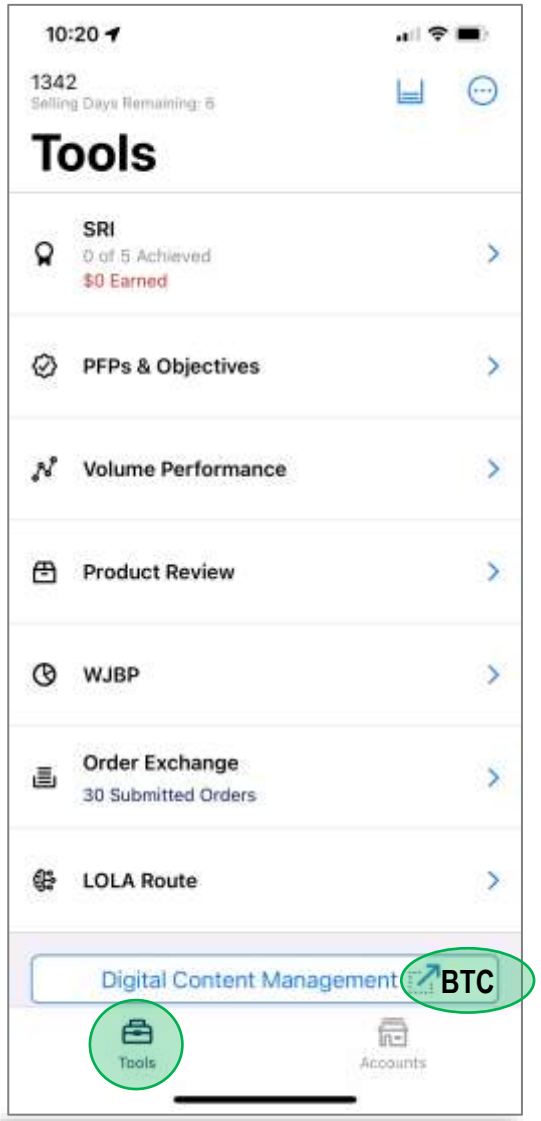
Azure

enables single sign-on between

M360

and

ENCOMPASS




- The tools menu is accessed via the Tools icon at the bottom of your screen.
- The Digital Content Management button takes you to Big Tin Can (BTC).

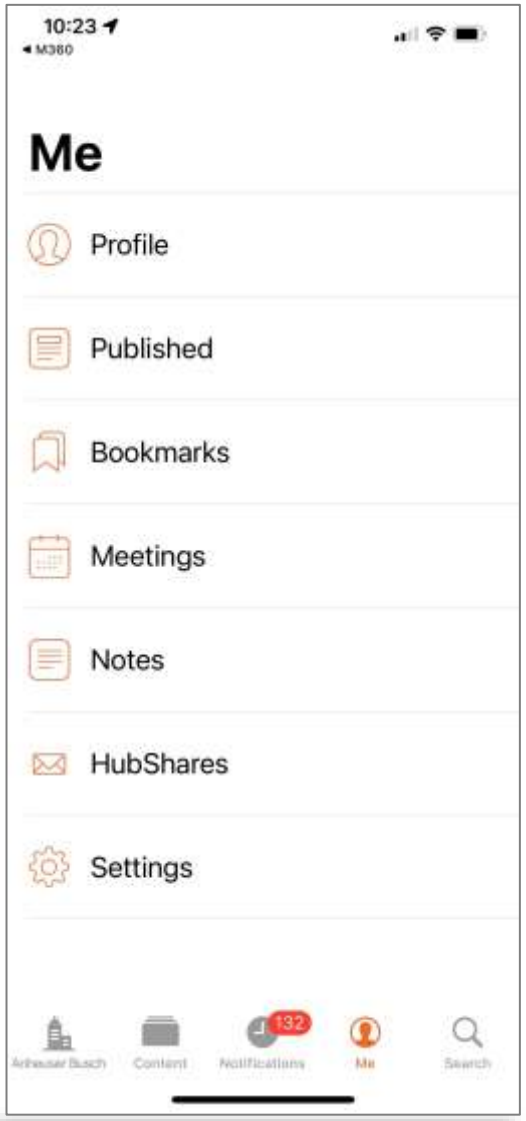
Azure

enables single sign-on between

M360

and

ENCOMPASS




- BTC provides access to tons of content.
- Content includes:
  - Training videos.
  - Sell in sheets.
  - And an immeasurable amount of other information.

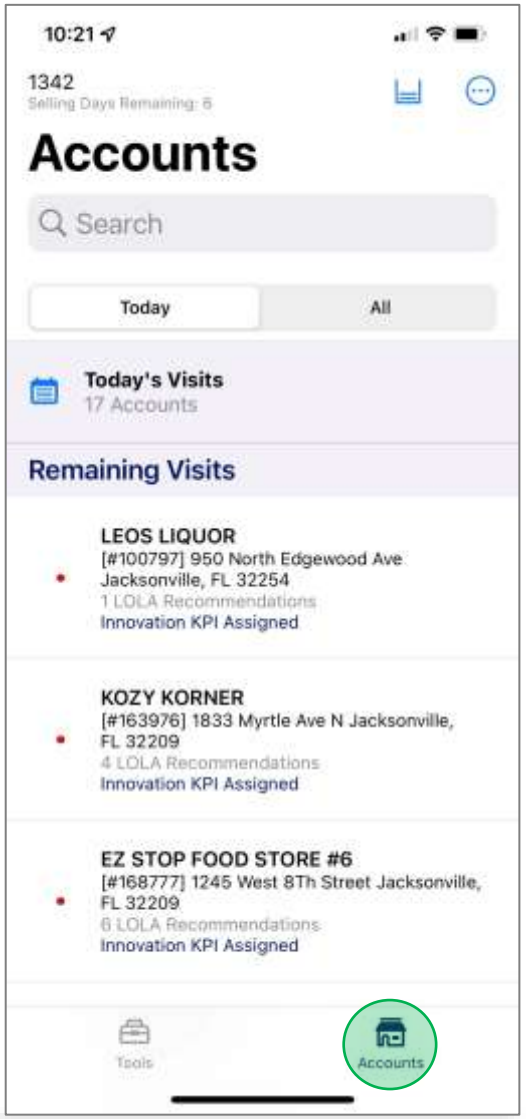
Azure

enables single sign-on between

M360

and

ENCOMPASS




- Accounts can be accessed by the Accounts icon on the bottom of your screen.
- Demo = Leos Liquor

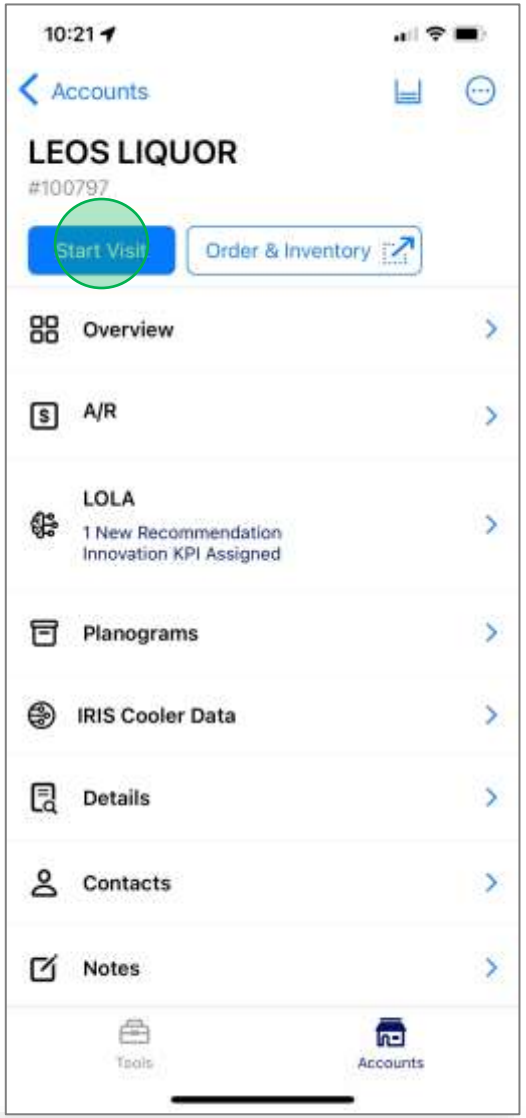
Azure

enables single sign-on between

M360

and

ENCOMPASS




- After selecting the account in M360, click Start Visit.

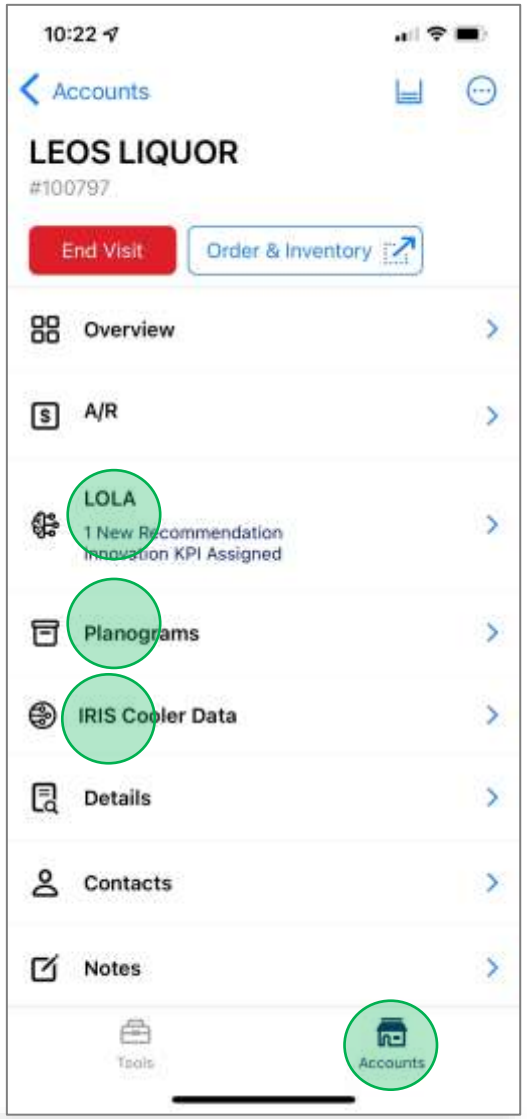
Azure

enables single sign-on between

M360

and

ENCOMPASS




- After starting the visit there are various account data at your fingertips.
  - LOLA is a great tool that will function better the more you use it.
  - Planograms will no longer need to be housed in Encompass. Saving everyone time during syncs.
  - IRIS is ‘coming soon’. You will use it to update shelf sets once it is rolled out.

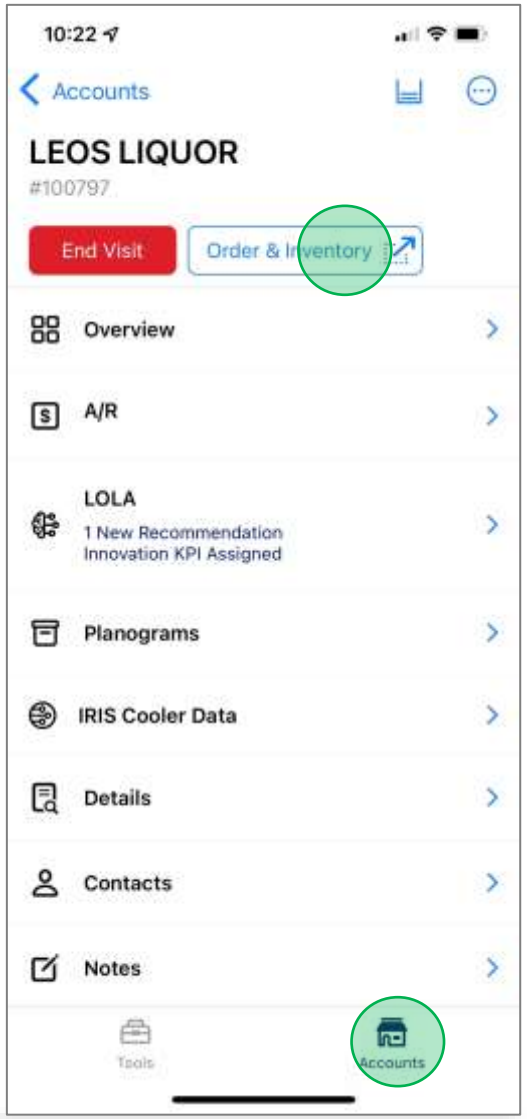
Azure

enables single sign-on between

M360

and

ENCOMPASS




- Click the Order & Inventory button to begin your order generating process.

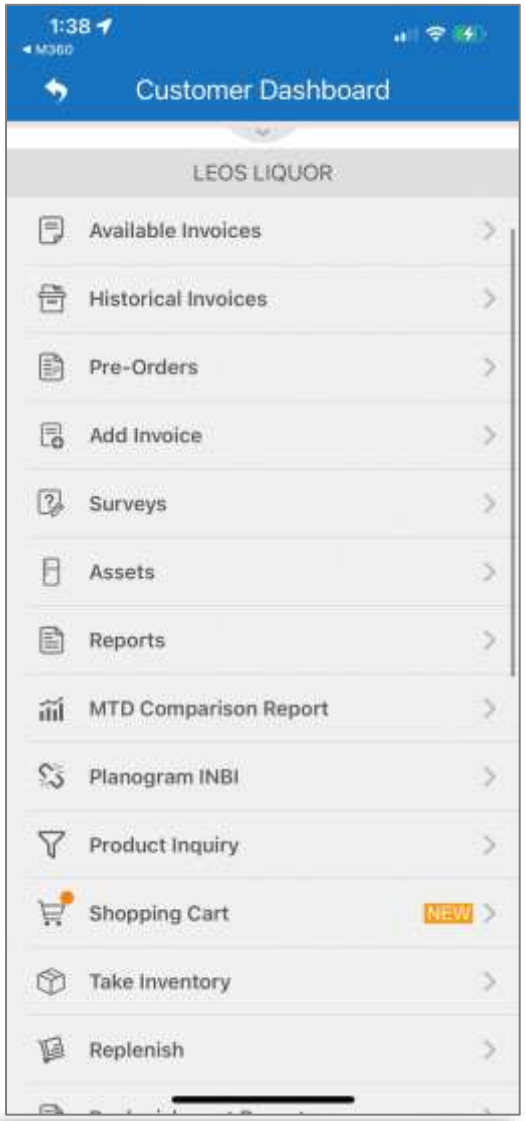
Azure

enables single sign-on between

M360

and

ENCOMPASS




- This screen should look very familiar.
- It is through the single sign-on process (using Azure) that M360 opens your Encompass app on your inventory and ordering page.

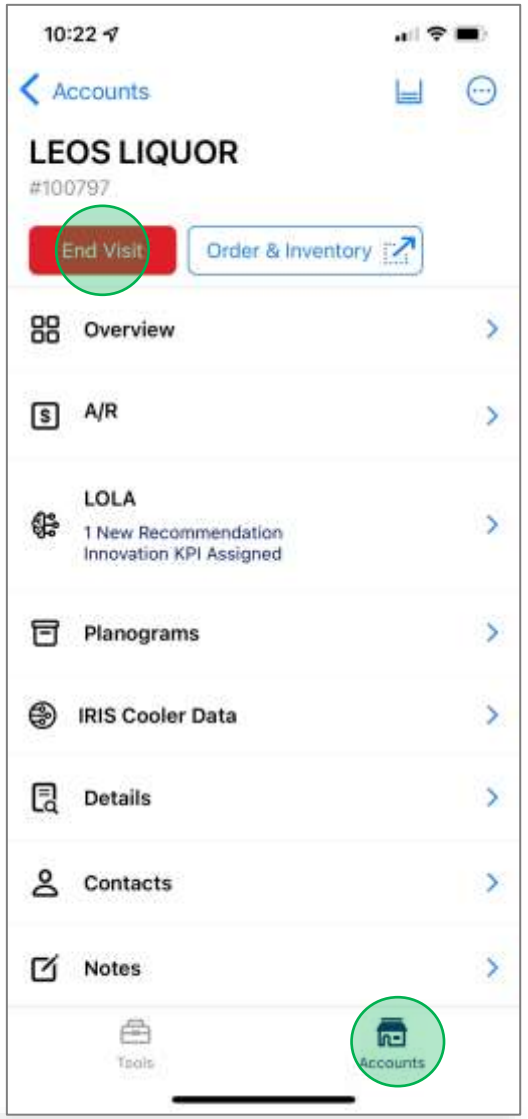
Azure

enables single sign-on between

M360

and

ENCOMPASS




- Be sure you click to End Visit before you leave the account.