ProFITS – Program for Integration, Testing and Sourcing

User Guide
Revised February 6, 2007

The ProFITS application contains two roles that distributorships can use to submit sourcing and assembly requests.

Role Defintions:

- **ProFITS Dist. Submitter** - Distributor personnel create requests and submit to Distributor queue
    - All request are forwarded to the Distr. Approver queue for review and approval

- **ProFITS Dist. Approver** - Distributor creates and/or reviews submittals from personnel and then submits to Marketing.
    - All Distributor approver submittals are automatically routed to the applicable RD and BDM for review.

Important Notes

- Data entries are required for fields marked with an *****asterisk
- SAVE OFTEN while working within a request and prior to submitting
- Roles are assigned by distributor through the Tube Securities section in DIA

Navigation Bar

- **Search for Request** – Screen that displays field options for locating a request
- **Submit New Request** – Screen that allows for new request entries

Search and Summary Screen View

Displays requests by:

- ISSRL Code
- Company Name
- Request Type
- Focus Market
- Date Submitted
- Status
- Service Category

Application Buttons

- **Go Back** – Returns one to the previous screen (SAVE before choosing this button)
- **Cancel Request** – Deletes from application

- **Save Draft** – Saves an unfinished request an places it in the queue that displays all requests
- **Print View** – Enables user to print a request
- **Submit** – Sends request to Marketing or the ProFITS distr. Approver for review and release
- **Print View** – returns one to the previous page for selecting “print” from the browser
- **Copy Request** – Use this button to create a re-approval of an existing approved request. When selecting an approved request that is in the queue, the copy butt on copies or duplicates the request and attaches a link to the original request.

Creating a New Request:

1. Enter ProFITS application via the Tube through assigned role
2. Click [Submit New Request]
    - Input data
    - Choose applicable options
3. Attach supporting documentation if applicable
4. Submit requests directly to:
    - Marketing
      OR
    - Distr. Approver for review and submission to Marketing

Creating a New Request DRAFT

1. Enter ProFITS application via the Tube through assigned role
2. Click [Submit New Request]
3. Input a portion of data
4. Click on “Save Draft”
    a. Draft is saved in the queue

Retrieving a New Request Saved DRAFT

1. Enter ProFITS application via the Tube through assigned role
2. Click Search for Request
3. Click on request for customer that you saved as a draft request
4. Open
5. Input data
6. Click submit

Creating a Re-approval or Auto-Approved Requests

1. Enter ProFITS application via the Tube through assigned role
2. Locate original approved request
3. Click copy request button
    a. This action places the auto- approved request into the application
    b. Request automatically approved (within the 90 day timeframe)
    c. Copy of auto-approval indicated in application
        - Link to original request attached to auto-approved request

- Submitter and RD/BDM automatically notified by email

Adding Vendor Information in Outsourced Products Section

1. Enter ProFITS application via the Tube through assigned role
2. Scroll to “Outsourced Products” section of request
3. Enter vendor, description and model information in the boxes
4. Click “Add” button to complete the action of adding vendor information into a request
   NOTE: Add button must be clicked even when only one vendor line item is added.

Adding Attachments

1. Enter ProFITS application via the Tube through assigned role
2. Scroll to “Attachments” section of request
3. Click “Browse” button to locate file for attaching to request
   a. Window will pop up asking you to search for file
      i. Once file is located, click open
      ii. Click insert
      iii. Click “Add Attachment” button
         NOTE: Add attachment must be clicked in order for file to be inserted and saved into a request

Review of Requests Submitted in Past

1. Enter ProFITS application via the Tube through assigned role
2. Click on “search for request”
3. Select request you want to view

Request More Information

Regional Directors now have the ability to request additional information from the person who submitted the request, through the ProFITS application.

If a regional director has chosen this option, they will enter comments as to what addition information is necessary in order for them to reach a decision, and return request to the person who originally submitted.

The person who receives the request for more information is to review, comment and submit request back to the regional director.

Request Acknowledgements

All acknowledgements are processed electronically. The person who submitted a request will be automatically notified via email of a request acknowledgement (Approved, Rejected and etc.).

The email containing the acknowledgment will contain both an attachment of the request and a live link into the ProFITS application.

Routing of Requests

Submitted requests are automatically routed to the applicable regional director (RD) and business development manager (BDM).

View Request Status

1. Enter ProFITS application via the Tube through assigned role
2. Click “search for request”
3. Scroll to the “status” column on right of screen
    a. Status options are:
        i. Distributor Review
        ii. Awaiting RD review
        iii. Awaiting VP Review
        iv. Awaiting CEO Review
        v. Rejected
        vi. Approved