New Client Setup

Preparation Sheets

I've checked that I can include each of the following:

- ☐ Financial Balance Sheet - Cash position, assets & liabilities
- ☐ Financial Profit & Loss - Income, cost of goods & operating expenses
- ☐ Profit Potential Worksheet - Potential return on investment for Client
- ☐ Break-Even Analysis - Financial analysis
- ☐ 24 Months Data History

Affiliate Work Pages

Date Submitted to Management One™:

Lead or Sole Affiliate:

Service Type Count Information

Service Type Descriptions:

- **Total Planned Parent Classes (Billable):**
- **Total Planned No Open to Buy Classes (PNOTB – Billable):**
- **Total No Open to Buy Classes (NOTB - Billable):**
- **Total Child Classes (Non-Billable):**
- **Total History Classes (Non-Billable):**
- **Total Distress Classes (Non-Billable):**

Total Management One™ Set-up Fee: $

Total Management One™ Monthly Class Rate: $

Total Monthly Associate Marketing Fee, such as a WhizBang referral*: $

Total Monthly Fee - Management One™ Rate plus Associate Marketing Fee: $

***Is this client acquired via The Associate Marketing Referral Program, such as being a WhizBang referral? Please highlight one:** Yes or No. If yes, please indicate the appropriate fee above.

Setup payment due upon receipt of setup

Client Profile

Client Code (Retail Orbit® will auto-assign)

Name of the store or business:

Legal Name:

Primary address

Address 1:

Address 2:

City:

State:

Zip Code:

Province:

Country:

Primary Contact Details. (**The planners use the website, Twitter and Facebook to get a better understanding of the store, merchandise and location.)**

Legal Name:

Email (primary user role email):

Phone:

Mobile:

Fax:

Skype:

Website:

Twitter:

Facebook:

Instagram:

Associate Marketer:

Point of Sale System:

Fiscal Year Type:

☐ Calendar

☐ 4-5-4 (List months which are 5 weeks)**:**

Fiscal Year End (Month)**:**

Default IMU:

Has Cash Flow Issues (Checked = Yes)**:**

☐ ☑

Has Plan on Demand (Checked = Yes)**:**

☐ ☑

Has Foreign Currency (Checked = Yes)**:**

☐ ☑

Year Founded or if not started by client, takeover year:

Acquisition

Referred By (please select one): Client Referral, Cold Calls, Industry or Business Meeting, Management One™ Recruiting and Selling, Networking, Retail Pro, RICS, Runit, Website, Management One™ Associate Marketing Referral Program (if Other, please specify)

Notes ***(This is very important … your responses to the areas below will help the planners build the most effective starting plans for your client!)***

General Notes. **Give an overview of the business, issues to overcome, and opportunities. Describe initial plans or thinking to address issues or exploit opportunities. Other Notes:** Include IMU range, if receiving history is not provided; price ranges; sale months; major events that impact business; point of view. Observations of the financial status of the company and how this will impact operations in the short term.

Competition Notes. **Summarize the competition from local independents, big box and ecommerce. Is this competition increasing and is it impacting the business?**

Classifications

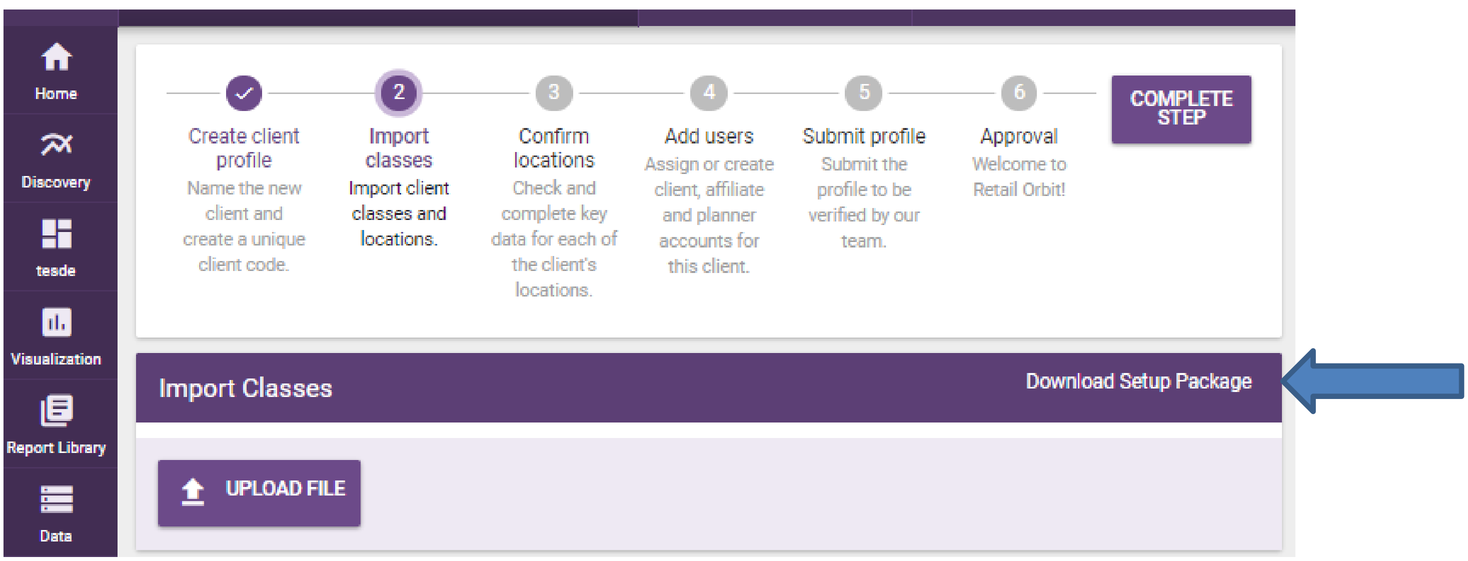
Each Parent Class must be linked to a Category, even if there is only one Category per location. Child classes will be linked to a Category via their respective parent classes.

A Parent Class can be a planned or non-planned class. It may have child classes associated with it, but this is not required. We recommend using child classes with the intent to grow them into parent classes.

Each class must have a unique alpha numeric class code and a unique class name.

Import Classes

Client Location and Class import template can be found on setup step #2, Import Classes. Click on "Download Setup Package" to download to your computer.



It can also be found here: [Client Import Template]

The Client Import Template provides a convenient, fast way for affiliates to create a complete class structure for a new client in Retail Orbit. The client import template is an Excel spreadsheet with nine columns, as shown below:

Action	Client Code	Location Code	Location Name	Service Type	Class Code	Class Name	Class Category	Parent Class Code
A	PW201	01	Shoe Store					
A	PW201	01	Shoe Store	OTB	101	Boys Accessory	Boys	

The column names need to be “Action”, “Client Code”, “Location Code”, “Location Name”, “Service Type”, “Class Code”, “Class Name”, “Class Category”, and “Parent Class Code”.

Each row in the spreadsheet refers to a single location or class which is to be created.

The spreadsheet should have **at least one location record**, and one or more class records.

Every location referenced in a class record must correspond to an existing location or to a location created in the same template file.

Upload the completed worksheet by clicking the “Upload File” button.

Estimated Class Volumes:

If there is incomplete sales history or a new location opening, then please provide estimated class volumes. This provides a baseline to understand the expected strength of each class.

This document can be found here: Class Volume Worksheet

Complete Location Profiles

Number of locations:

A separate profile must be created for each location.

	First Location	Second Location
Code: If this is an electronic upload, this code must be an exact match with POS system. If the POS code is 01, this code must be 01, and not 1:		
Breakeven Volume		
Complete rest of table if different from Client Profile		
Name (how client wishes it to appear on reports, such as "Anytown" or "Main Store")		
Address		
Address		
City		
State		
Zip Code		
Province		
Country		
Phone		
Fax		
POS System (please specify if different than on client profile)		
Fiscal Year Type (please specify if different than on client profile, either calendar or 4-5-4)		
If 4-5-4, list 5 week months		
Fiscal Year End (change if not December)	December	December
Active Date: Admin purposes only		
Setup Billed Date: Admin purposes only		
If Seasonal, list months the store is open		

Store Profile: A separate Store Profile is required for each location.

Circle or highlight all that apply

- Classic
- Contemporary
- E-commerce
- Lifestyle/Active/ Performance
- Luxury
- Outlet/Clearance
- Resale
- Rural
- Seasonal
- Vertical
- License
- Warehouse
- Other (*please describe*)

Store Type: A separate Store Type is required for each location.

Circle or highlight all that apply

- Adult
- Art Gallery
- Bicycle
- Children's
- Equestrian
- Gift and Home Furnishings
- Juniors
- Kitchen
- Men's
- Outdoor/Recreational
- Pet
- Quilt/Fabric
- Shoes
- Ski
- Surf and Skate
- Toys/Hobby
- Uniform
- Women's
- Western
- Other (*please describe*)

Location Type: A separate Location Type is required for each location.

Circle or highlight all that apply

- Downtown
- Kiosk
- Lifestyle Center
- Neighborhood
- Regional Mall
- Resort
- Seasonal Stores – Pop-Up locations
- Stand Alone
- Store Within a Store
- Strip Center
- University
- Warehouse
- Other (*please describe*)

Geographic Area: A separate Geographic Area is required for each location.

Circle or highlight one

- Eastern Canada
- Western Canada
- Urban N.E. - NYC, Boston, Philadelphia
- New England - Maine, VT., NH, NY State, MA., CT., RI, Eastern Pa.
- Mid-Atlantic - NJ, MD, VA, DC, NC
- South East - SC, WV, GA, MS, AL, N.E. Florida, Panhandle, Mobile, Biloxi
- Florida - Everything but the Panhandle
- Mid-South - KY, TN, LA, AR
- Mid-West - Western PA, OH, IN, MI, IL, WI, IA, MO
- Plains - NE, KS, ND, SD, OK
- Texas
- Mountains - WY, CO, UT, ID, MT
- Southwest - AZ, NV, NM
- Northwest - N. CA. OR, WA
- So. California
- Alaska
- Hawaii
- Caribbean
- Central America
- South America
- Europe
- Southeast Asia
- Australia
- New Zealand

Add Users

(Assign or create client and affiliate accounts) **Complete a column for each user in the client's organization such as client, manager or buyer, inputting all data that differs from the Primary User, such as email and password. Copy the table as required.**

	Primary User	User 2
Email		
Initial password (must be at least 6 characters & CAP Sensitive)		
Company name		
First Name:		
Last Name:		
Phone:		
Mobile:		
Fax:		
Twitter:		
Facebook https:		
Skype:		
Address:		
Address:		
City:		
State:		
Zip Code:		
Province:		
Country:		
Billing Address: complete below, if different from above		
Address:		
Address:		
City:		
State:		
Zip Code:		
Province:		
Country:		
Indicate 1 role: Client, Buyer, Manager or Other (specify)		

Key Vendors:

Listing the key vendors give the planners a better understanding of the store and the target customer. Prepare a separate table for each location, if different.

The worksheet can be found here: Key Vendors Worksheet

History Load

History provided. Please highlight one: Yes or No

Shuttle Upload: Yes or No

Affiliate Upload: Yes or No

Please use this upload document for all manual entry uploads: Data Upload Document

Complete Setup

Please review your billing, locations, and classes to make sure everything looks correct.

You will still need to include the following:

- 24 months Data History
- Financial Statement
- Breakeven
- PPW
- Do you need the plans this month?

If everything is ready you can now submit your setup for approval.

Submission

Please send all supplemental setup documents to:

support@management-one.com

support@retailorbit.com

For Support Call: 520-612-2001