

**ROUSES MARKETS**

# **Rouses Vendor Training Guide**

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*\*Select Rouses Stores*

# Partnership with Rouses

Rouses utilizes Tactiq's Globalworx Platform to enhance communication, grow sales, and improve the customer experience.



## **Streamlined Communication**

GlobalWorx eliminates inefficient communication methods between Stores and Vendors and provides transparent service issue tracking for both parties.



## **Immediate Notification**

Vendors are instantly alerted to in-store product and service opportunities via phone call and email.

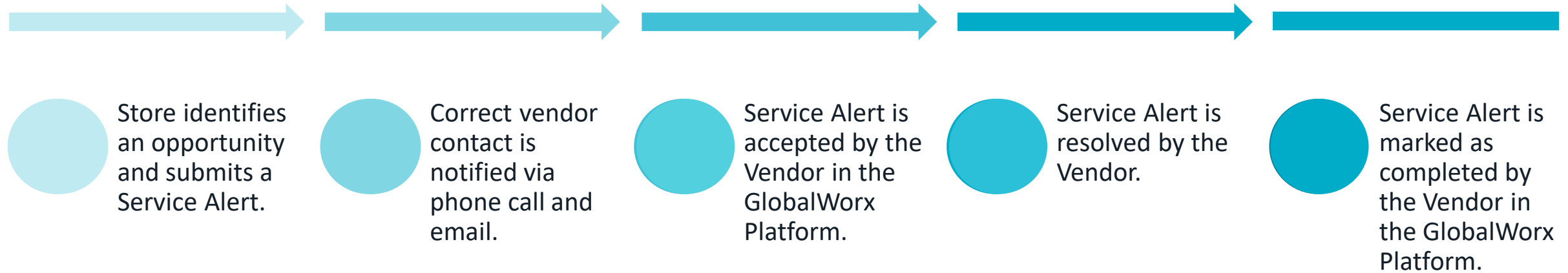


## **Data Collection and Reporting**

GlobalWorx aggregates service and product opportunity data into actionable reporting, providing Vendors with real-time insights.

# GlobalWorx Service Alert Process

Users can submit Service Alerts and track the alert through the alert lifecycle of acceptance and completion.



# Service Alerts

# Service Alerts

Service Alerts are submitted to notify the Vendor of any opportunities in the store.

## Manual Service Alerts

- Manual Service Alerts are manually submitted by Rouses Team Members to communicate specific opportunities in the store.



# Manual Service Alerts

Manual Service Alerts are created by Store Team Members when they see an opportunity in the store and follow pre-configured escalation paths based on alert type.

## Manual Service Alerts

- **Out of Stock**  
*Escalates Contact 1 → Contact 2 → Contact 3*
- **Out of Date**  
*Escalates Contact 1 → Contact 2 → Contact 3*
- **Needs Merchandising**  
*Escalates Contact 1 → Contact 2 → Contact 3*
- **Missed Service**  
*Escalates Contact 1 → Contact 2 → Contact 3*
- **Display Discrepancies**  
*Escalates Contact 1 → Contact 2 → Contact 3*
- **Tag Removal**  
*Escalates directly to Contact 3, no Vendor response required*
- **Late Delivery**  
*Escalates directly to Contact 3, no Vendor response required*
- **Backstock/Overstock**  
*Escalates Contact 2 → Contact 3*
- **Housekeeping**  
*Escalates Contact 1 → Contact 3*
- **Fire Lane Violation**  
*Escalates directly to Contact 3, no Vendor response required*
- **Using Customer Parking**  
*Escalates directly to Contact 3, no Vendor response required*
- **Missing Invoice**  
*Escalates Contact 2 → Contact 3*
- **Failure to Check Out**  
*Reporting only, no notification sent to Vendor*
- **Failure Processing Credits**  
*Escalates Contact 1 → Contact 3*
- **Positive Comment**  
*Reporting only, no notification sent to Vendor*
- **Unprofessional Conduct**  
*Escalates directly to Contact 3, no Vendor response required*
- **Unauthorized Equipment Usage**  
*Reporting only, no notification sent to Vendor*
- **Other**  
*Escalates Contact 1 → Contact 2 → Contact 3*

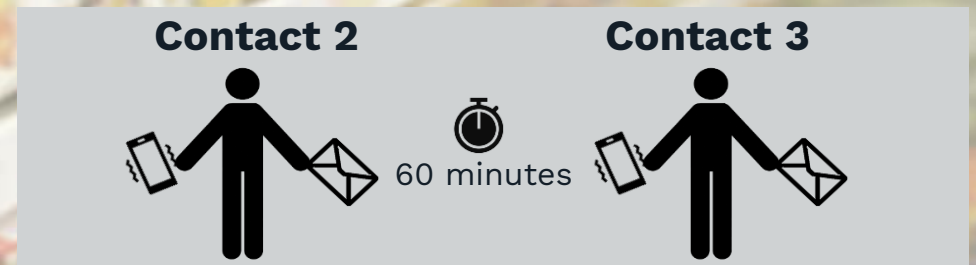
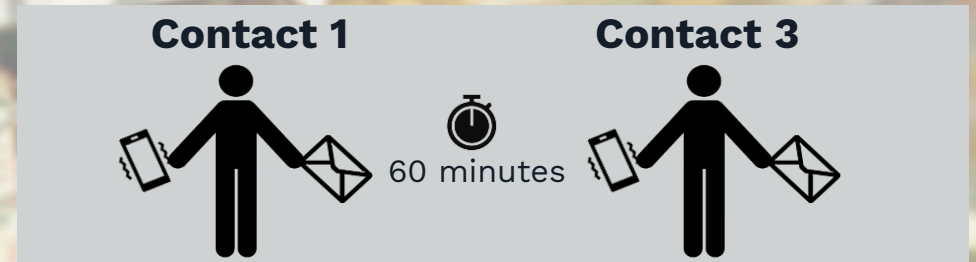


# Escalated Service Alerts

Escalated Service Alerts follow a pre-configured escalation path based on alert type. Each contact will have **60 minutes** to accept the request before it is escalated to the next contact.

The screenshot shows the GLOBALWORX mobile app interface. It features a header with the GLOBALWORX logo and a power icon. Below the header are several dropdown menus: 'Select Manufacturer...', 'Select Distributor...', 'Service Alert', 'Out of Stock', and 'Ad items out of stock'. A 'Description:' section with a text input field 'Please describe...' is also visible. At the bottom, a blue button with a white icon of a person and a document is labeled 'Submit Issue'. This button is highlighted with a red rectangular border.

Retailer View





# Escalated Service Alerts

The following alerts follow an escalation path and require acceptance and completion by the Vendor.

## Alerts that follow the direct escalation path of Contact 1 → 2 → 3:

- Out of Stock
- Delivery Discrepancies
- Need Merchandising
- Out of Date
- Missed Service
- Other

## Alerts that follow a pre-configured escalation path:

- |                              |               |
|------------------------------|---------------|
| ▪ Housekeeping               | Contact 1 → 3 |
| ▪ Backstock/Overstock        | Contact 2 → 3 |
| ▪ Missing Invoice            | Contact 2 → 3 |
| ▪ Failure Processing Credits | Contact 2 → 3 |

## OUT OF STOCK

Hi Laura Desantis,

**A service issue was created for Demo #103 - Richmond**

*Date/Time:* 10/14/2024 03:22 PM

*Issue Type:* Out of Stock

*Description:* Ad items out of stock

*Notes:* Out of Stock. Ad items out of stock. Product ABC Out of Stock

[Click here to respond to this issue \\*](#)

# Non-Escalated Service Alerts

The following alerts DO NOT follow an escalation path and DO NOT require acceptance and completion.

**Alerts that escalate directly to Contact 3 and will send a “Communicated” notification that does not require a response:**

- Unprofessional Conduct
- Fire Lane Violation
- Using Customer Parking
- Tag Removal
- Late Delivery

**Alerts that are for reporting only and will not send a notification:**

- Positive Comment
- Unauthorized Equipment Usage
- Failure to Check Out

## LATE DELIVERY

Hi Laura Desantis 3,

***A violation was created for Demo #103 - Richmond.  
No immediate response required.***

Date/Time: 12/20/2024 01:10 PM

Issue Type: Late delivery

Notes: Late delivery.

Created By: Manager, Demo #103 - Richmond

Reason: Receiving closing time: 3:00 PM

Time of arrival: 7:45 PM

Days: Monday, Thursday, Saturday

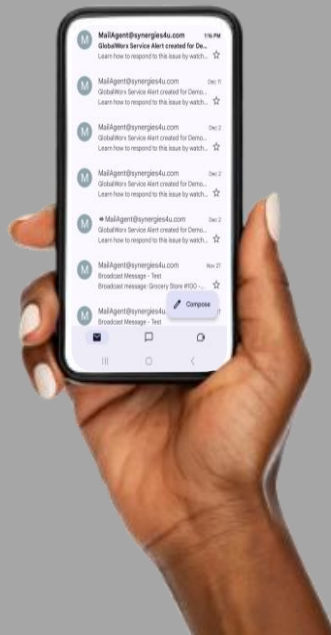
[Please click here to communicate back to the store \\*](#)

# Receiving Service Alerts

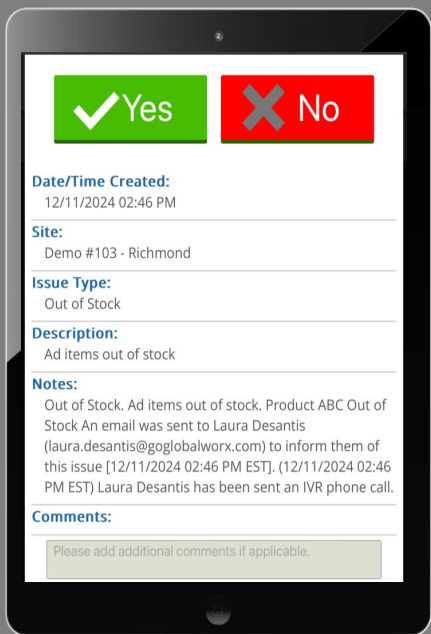
Vendor Contacts are notified of a Service Alert via:



Interactive Voice Response  
phone call



Email from  
MailAgent@Synergies4U.com



The backroom tablet  
*\*Available at select Rouses stores*

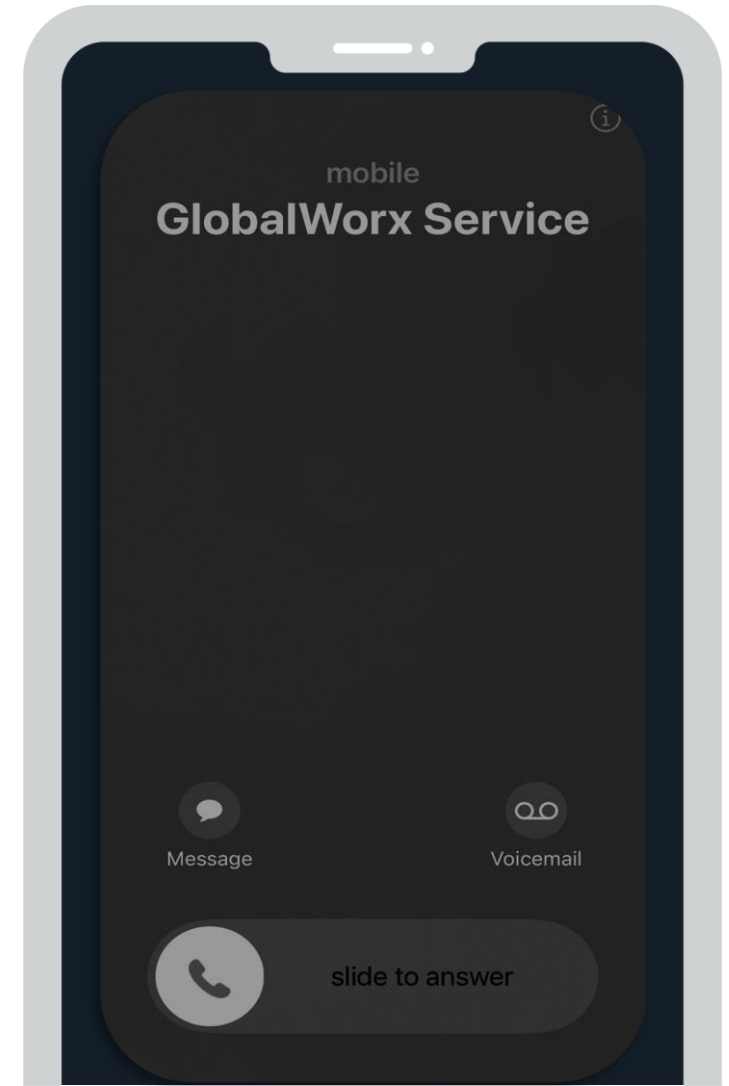
# Receiving Service Alerts

Service Alerts can be accepted through the Interactive Voice Response (IVR) phone call.

- Answer the IVR phone call from

**1-(866)485-5915**

- Say “Hello” to activate the IVR call, otherwise, the call will go to voicemail.
- Select an option after reviewing the description and response options.
- The Service Alert phone call will come from the same phone number every time.
- We suggest you save this number to your phone contacts.



# Receiving Service Alerts

Service Alerts can be accepted and completed through the email notification.

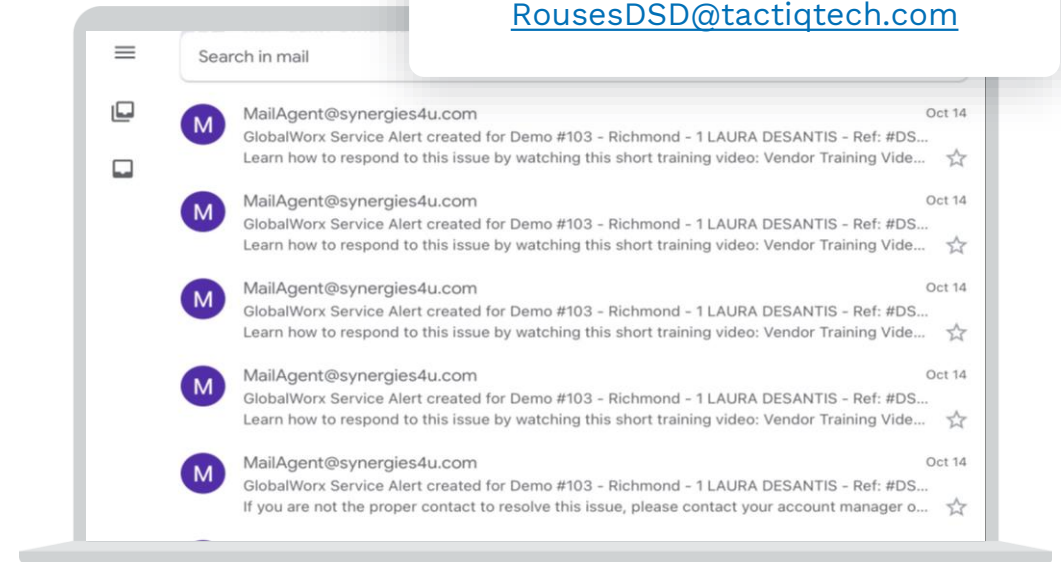
- All Service Alert emails will come from

**MailAgent@Synergies4U.com**

- If you are not receiving Service Alert emails, please check your spam folder.
- We suggest you save this email address to your contact list to ensure Service Alerts go directly to your inbox.

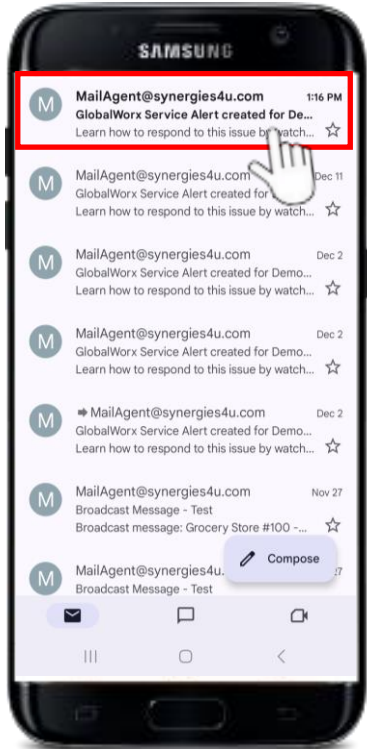
## Need to update your contacts?

Please reach out to our Account Services team at [RousesDSD@tactiqtech.com](mailto:RousesDSD@tactiqtech.com)

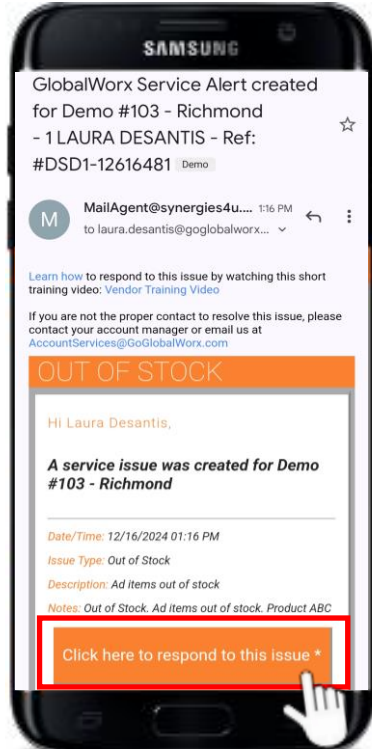


# Accepting Service Alerts

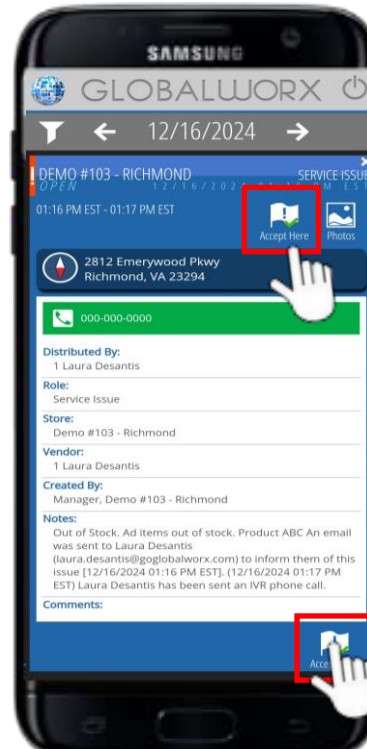
Follow the steps below to **accept** a Service Alert:



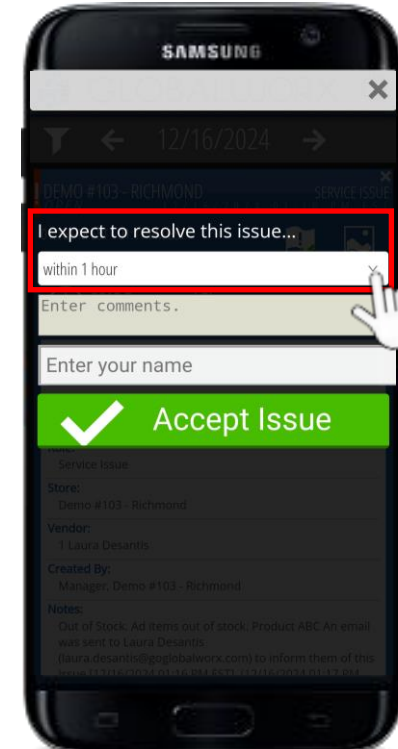
Find the **service alert email**



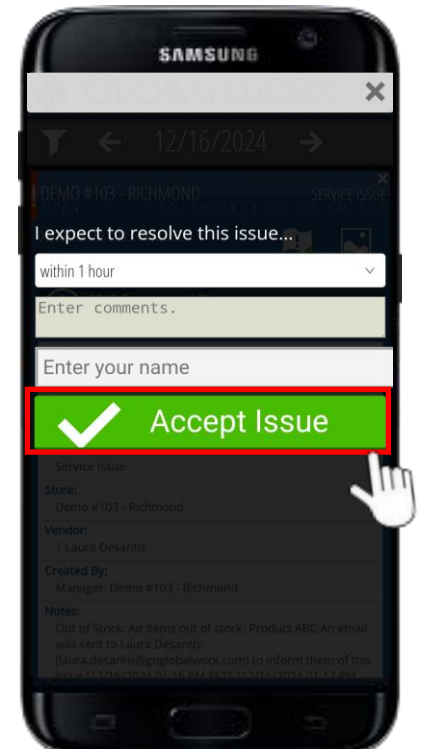
Select **"Click here to respond to this Issue"**



Select one of the **"Accept Here"** icons



Select the **time frame** you will resolve the Service Alert

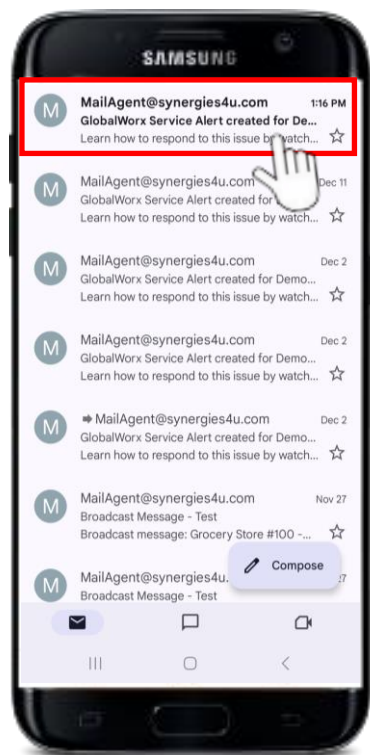


Enter your name and select **"Accept Issue"**

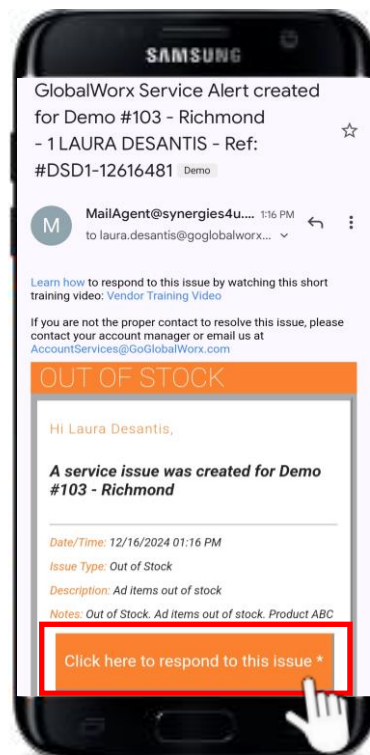


# Completing Service Alerts

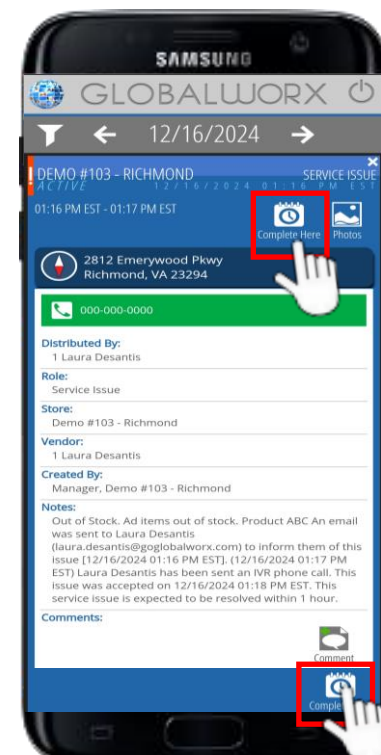
Follow the steps below to **complete** a Service Alert:



Find the **service alert email**



Select **“Click here to respond to this Issue”**



Select one of the **“Complete Here”** icons



# Completing Service Alerts

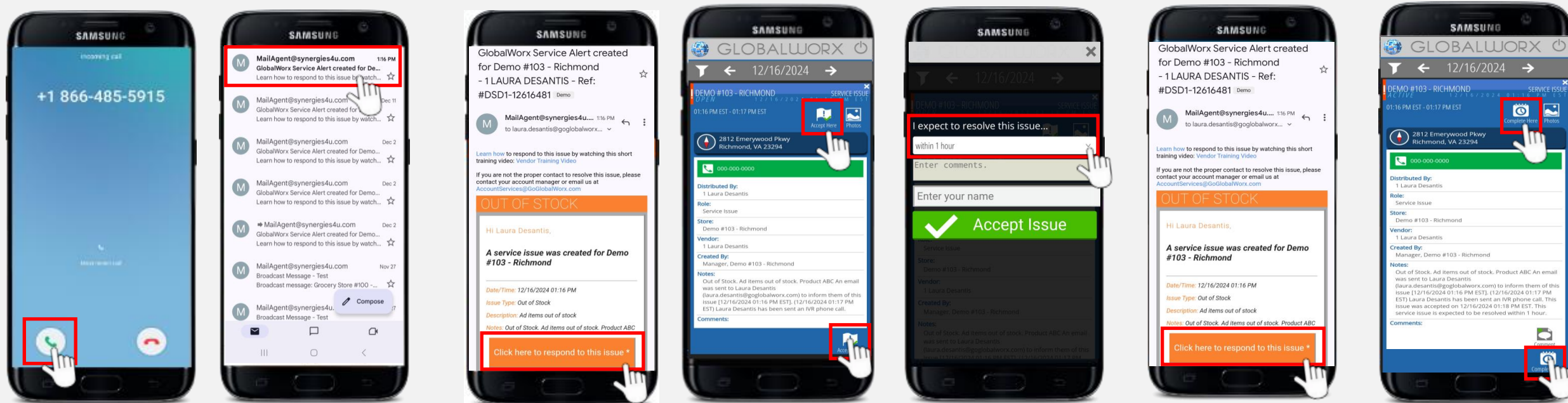
Once an escalated alert is created, you will have **48 hours** to complete the alert in the GlobalWorx Platform. **If an alert is not completed within 48 hours, it will be marked as a Missed Alert.**



In the GlobalWorx Platform, use the arrows at the top of the screen to toggle to previous days to ensure all alerts are completed.

# Rouses Escalated Alert Guide

## Step-by-Step Guide To Accepting & Completing Escalated Alerts



### RECEIVING AN ALERT

#### **IVR Phone call: (866) 485-5915**

- Description of the service alert
- Verbally prompted steps on how to ACCEPT escalated alerts

#### **Email: MailAgent@Synergies4U.com**

- Additional service alert details
- ACCEPT AND COMPLETE escalated alerts through platform
- Provide additional comments

### ACCEPTING AN ALERT

#### **STEP 1**

Open the email and select the "click here to respond to this issue" button.

#### **STEP 2**

Once you are ready to accept the alert, select one of the "Accept Here" icons.

#### **STEP 3**

Select the timeframe when you intend to resolve the opportunity. Enter in your name. Then select "Accept Issue".

Accepting the Escalated Alert provides instant feedback to the store that you are aware of the alert and when you anticipate the opportunity will be resolved. To view alerts created on a previous day, use the white arrows at the top of the screen.

*\*Please direct any inquiries to [RousesDSD@tactiqtech.com](mailto:RousesDSD@tactiqtech.com).*

### COMPLETING AN ALERT

Click the link to open the escalated alert from the original email. Select one of the "Complete Here" icons. Alerts can also be completed at the tablet in select Rouses stores.

*Note: Escalated Alert cannot be completed through the phone call*



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# Alert Status

Once in the GlobalWorx platform, Vendors can track a Service Alert through its lifecycle by the status.

- **Open** – Alert is not yet accepted
- **Active** – Alert is accepted
- **Completed** – Alert is completed
- **Verified** – Alert is completed and verified as satisfactory or unsatisfactory
- **Communicated** – Notification was sent to the 3rd-level contact. No acceptance or completion is required.

| GLOBALWORX              |                |         |        |
|-------------------------|----------------|---------|--------|
| 10/07/2024 - 10/14/2024 |                |         |        |
| 1 LAURA DESANTIS        | SERVICE ISSUE  |         |        |
| COMPLETED               | 10 / 14 / 2024 | 10 : 20 | AM EST |
| 1 LAURA DESANTIS        | SERVICE ISSUE  |         |        |
| COMMUNICATED            | 10 / 14 / 2024 | 10 : 19 | AM EST |
| 1 LAURA DESANTIS        | SERVICE ISSUE  |         |        |
| OPEN                    | 10 / 14 / 2024 | 10 : 17 | AM EST |
| 1 LAURA DESANTIS        | SERVICE ISSUE  |         |        |
| ACTIVE                  | 10 / 14 / 2024 | 10 : 16 | AM EST |
| 1 LAURA DESANTIS        | SERVICE ISSUE  |         |        |
| VERIFIED                | 10 / 14 / 2024 | 10 : 07 | AM EST |

# Deleted Alerts

Stores can **Delete** an alert if an error was made during creation.

- Stores have the **Delete Alert** action available after submitting an alert.
- When the Store deletes an alert, all Vendors that were notified of the alert will receive an email notification letting them know that no further action is required.

## DELETED

Hi Laura Desantis,

*The service issue for Demo #103 - Richmond has been deleted. No further action is required.*

---

*Date/Time:* 10/14/2024 03:22 PM

*Issue Type:* Out of Stock

*Description:* Ad items out of stock

*Notes:* Out of Stock. Ad items out of stock. Product ABC Out of Stock An email was sent to Laura Desantis ([laura.desantis@goglobalworx.com](mailto:laura.desantis@goglobalworx.com)) to inform them of this issue [10/14/2024 03:22 PM EST]. (10/14/2024 03:23 PM EST) GlobalWorx called Laura Desantis and left a voicemail.

*Comments:* Incorrect Vendor [10/14/2024 03:23 PM EST]

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# Re-Escalated Alerts

Stores can **Re-Escalate** an alert to bring the alert to the attention of the Vendor.

Stores can **Re-Escalate** an alert for the following reasons:

- **Not accepted in reasonable time period:** Alert escalated through all contact levels without being accepted
- **Resolution time is unacceptable:** Responded resolution time is deemed unacceptable by the store
- **Did not mitigate in expected time period:** Vendor did not resolve the Service Alert in the response time provided when accepting the alert

The **3rd Level Contact** will receive an email notifying them that the store escalated the alert



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## ATTENTION REQUIRED

Hi Laura Desantis 3,

*The service issue for Demo #103 - Richmond has been escalated by the store. Please check notes for details.*

---

*Date/Time:* 10/14/2024 03:26 PM

*Issue Type:* Out of Stock

*Description:* Ad items out of stock

*Notes:* Out of Stock. Ad items out of stock. Product ABC An email was sent to Laura Desantis ([laura.desantis@goglobalworx.com](mailto:laura.desantis@goglobalworx.com)) to inform them of this issue [10/14/2024 03:26 PM EST]. (10/14/2024 03:26 PM EST) Laura Desantis has been sent an IVR phone call. This issue was accepted on 10/14/2024 03:27 PM EST. This service issue is expected to be resolved within 3 hours. The store has escalated this service alert for the following reason: Did not mitigate in expected time period. Alert accepted with a 3 hour response time, but store was not serviced within 3 hours. [10/14/2024 03:28 PM]

*Comments:*

Click here to respond to this issue \*

# Verified Alerts

Stores can **Verify** whether a completed alert has been resolved to their satisfaction.

If the alert is marked as **Satisfactory**:

- Store was satisfied with the resolution of the Service Alert
- It is marked in reporting and no further action is necessary for the Vendor

If the alert is marked as **Unsatisfactory**:

- Store was not satisfied with the resolution of the Service Alert
- **Not reopened:**
  - 3rd Level Contact is notified via email
  - Marked for reporting and no further action is necessary for the Vendor
- **Reopened:**
  - 3rd Level Contact is notified via email
  - Alert is reopened and must be accepted and completed

## REOPENED

Hi Laura Desantis 3,

*The service issue for Demo #103 - Richmond has been verified as unsatisfactory by the store. This issue has been reopened and requires immediate action. Please see comments below for more information.*

*Date/Time: 10/14/2024 03:32 PM*

*Issue Type: Out of Stock*

*Description: Ad items out of stock*

*Notes: Out of Stock. Ad items out of stock. Product ABC An email was sent to Laura Desantis ([laura.desantis@goglobalworx.com](mailto:laura.desantis@goglobalworx.com)) to inform them of this issue [10/14/2024 03:25 PM EST]. (10/14/2024 03:25 PM EST) Laura Desantis has been sent an IVR phone call. Service Issue reopened after unsatisfactory verification.*

*Comments: Service issue was unsatisfactory. Supplier marked issue as complete, but did not resolve the issue. [10/14/2024 03:32 PM]*

[Click here to respond to this issue \\*](#)

# Digital Check-In & Out

*\*Available in select Rouses stores*




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# Logging In to the Tablet

All Vendors are required to check in and out on the tablet located in the backroom.



GLOBALWORX  
the next generation activities management system

Select to login as

**DSD  
SERVICER**

Demo #103 - Richmond

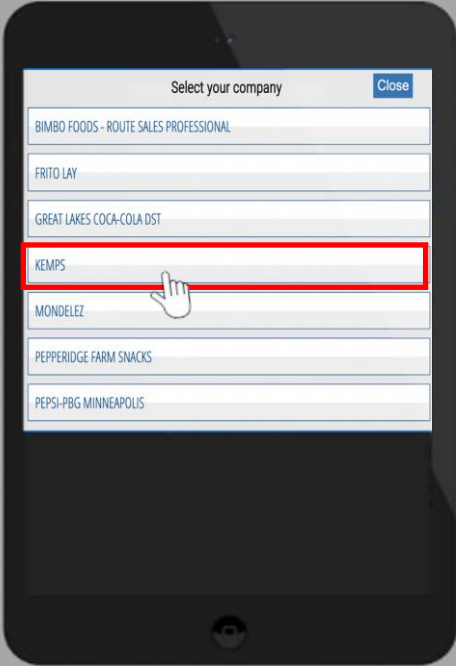
[Click here to login as store](#)

Having trouble?  
Call 1-855-451-1535

Click the link to learn:  
[How To Check In](#)

Click the link to learn:  
[How To Check Out](#)

Select **DSD Servicer**



Select your company

BIMBO FOODS - ROUTE SALES PROFESSIONAL

FRITO LAY

GREAT LAKES COCA-COLA DST

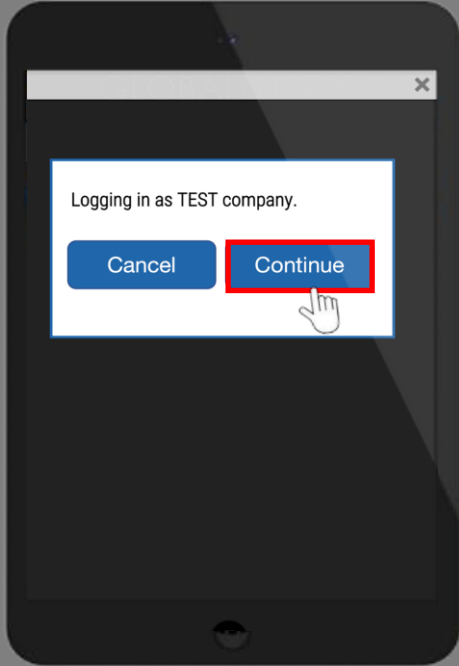
**KEMPS**

MONDELEZ

PEPPERIDGE FARM SNACKS

PEPSI-PBG MINNEAPOLIS

Select your **Vendor Company**



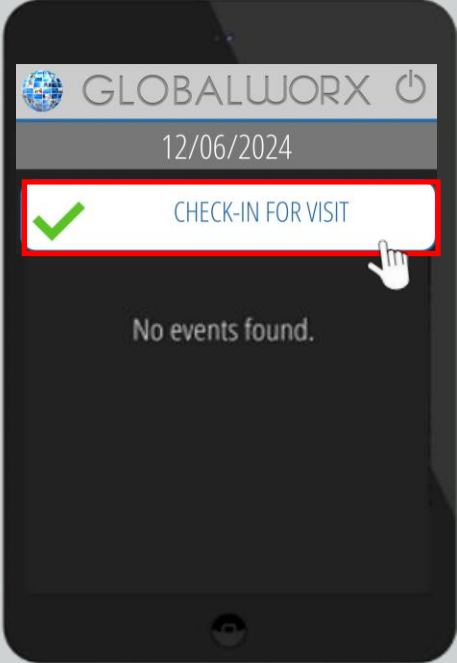
Logging in as TEST company.

Cancel **Continue**

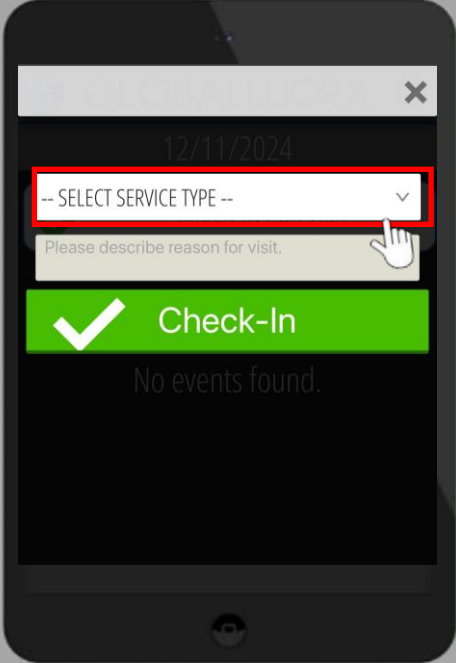
Select **Continue**

# Checking In for Service

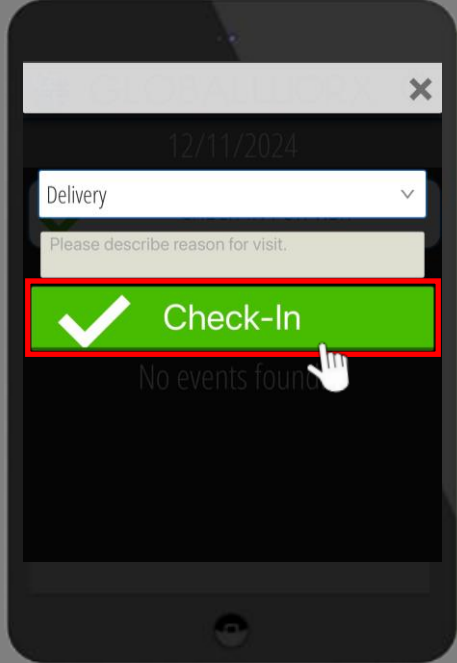
All Vendors are required to check in and out on the tablet located in the backroom.



Select **Check-In For Visit**



Select your **Service Type**

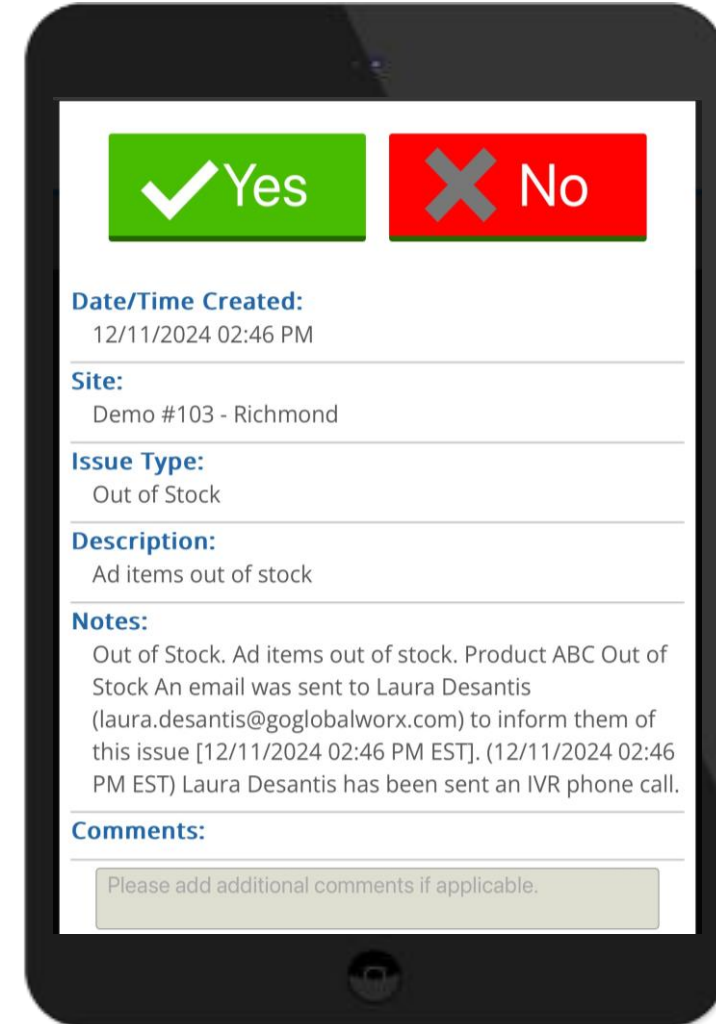


Select **Check-In**

# Completing Alerts from the Tablet

Vendors will be notified of any Open or Active Service Alerts upon checking in or out.

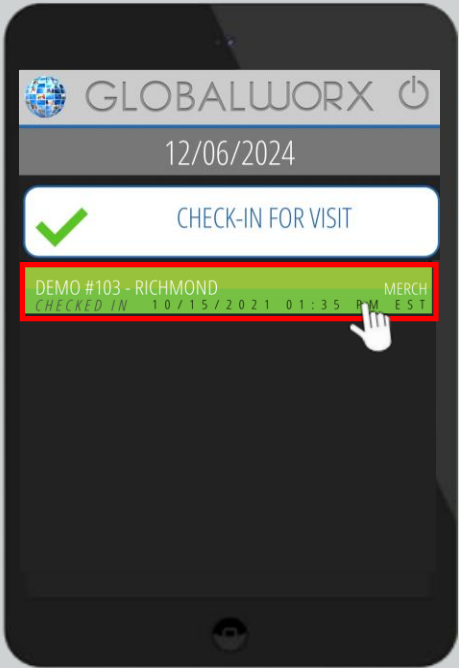
- If the Vendor is able to resolve the Service Alert during their store visit, the Vendor can select **Yes** and the Service Alert will be marked as **complete**.
- If the Vendor is not able to resolve the Service Alert during their store visit, the Vendor can select **No** and the Service Alert will remain in its **open** or **active** status.
- Comments can also be added to the Service Alert in the **Comments** section at the bottom of the prompt.



The image shows a tablet screen with a service alert form. At the top, there are two large buttons: a green button with a white checkmark and the word "Yes", and a red button with a white 'X' and the word "No". Below these buttons, the form contains several sections: "Date/Time Created:" with the value "12/11/2024 02:46 PM", "Site:" with the value "Demo #103 - Richmond", "Issue Type:" with the value "Out of Stock", "Description:" with the value "Ad items out of stock", "Notes:" with a detailed text entry, and "Comments:" with a text input field. The text input field has a placeholder that says "Please add additional comments if applicable."

# Checking Out After Service

All Vendors are required to check in and out on the tablet located in the backroom.



Select your previously **checked-in event**, highlighted in green



Select **Check Out**

# Tablet Assistance

If a tablet is down, please follow the steps below:

- Please notify a store employee if the tablet is not working properly.
- To check in and out if the tablet is not working, call:

**(855) 451-1535**

- When calling to check in and out, leave the following information when prompted:
  - Name of the Vendor you represent
  - Retailer Store # you are servicing
  - Service being performed (Delivery, Merchandising, etc.)



# Rouses DSD Servicer Program Expectations

## Step-by-Step Guide To Digital Check-In & Out

### Logging In

All DSD Servicers must log in via the tablet.

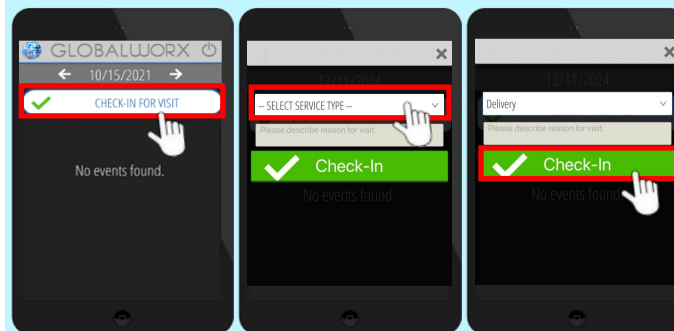
1. Select the “DSD SERVICER” button.
2. Select your company name from the list of vendors who service the store.
3. Select “Continue” to log in.



### Checking In

All DSD Servicers are **required** to Check In on the tablet before service.

1. Log in to the tablet. Refer to – *Logging In*.
2. Select “Check In For Visit”.
3. Select your service role.
4. Select “Check In”.



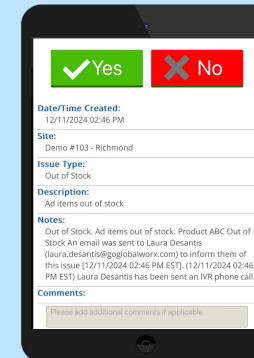
### Service Alerts

After checking in, you will be prompted with any open service requests.

Select “**Yes**” to complete the request during your visit

Select “**No**” to keep the request open

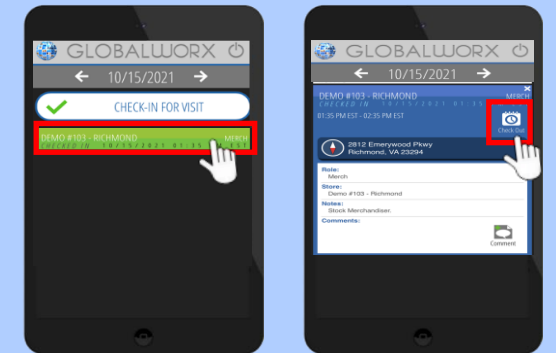
*\*Note: You can add comments to the service alert in the “Comments:” section at the bottom of the notification.*



### Checking Out

All DSD Servicers are **required** to Check Out on the tablet after service.

1. Log in to the tablet. Refer to – *Logging In*.
2. Select your previously checked in event.
3. Select “Check Out”.



### Vendor Assistance:

1. Review video tutorials on the tablet for help with how to check in and check out.
2. Vendors can check in and out if the tablet is not working by calling: **1-855-451-1535**.

# Contact Us

Account Services:

[RousesDSD@tactiqtech.com](mailto:RousesDSD@tactiqtech.com)

Account Manager: **Justin Calabrese**

[Justin.Calabrese@tactiqtech.com](mailto:Justin.Calabrese@tactiqtech.com)