

Smart & Final Vendor Training Guide

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Partnership with Smart & Final

Smart & Final 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.

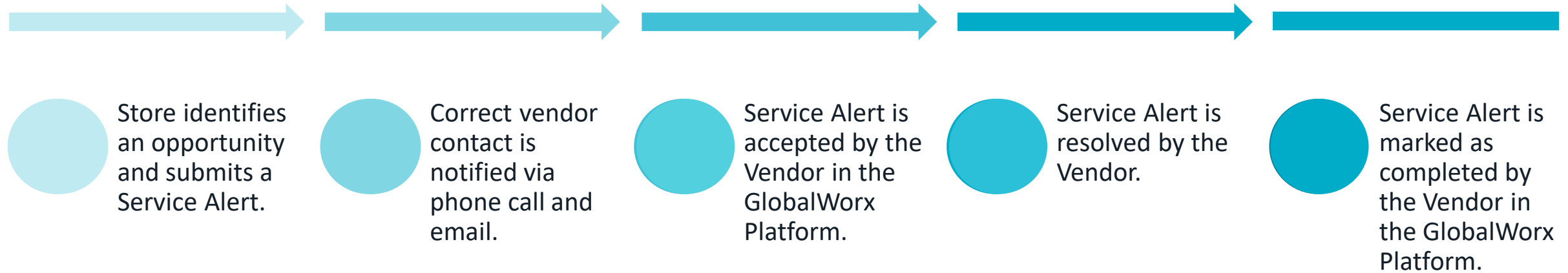


Data Collection and Reporting

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.

AUTOMATED SERVICE ALERTS

- Automated Service Alerts are auto-generated based on business-defined criteria from scanned out-of-stock data provided by Smart & Final.

MANUAL SERVICE ALERTS

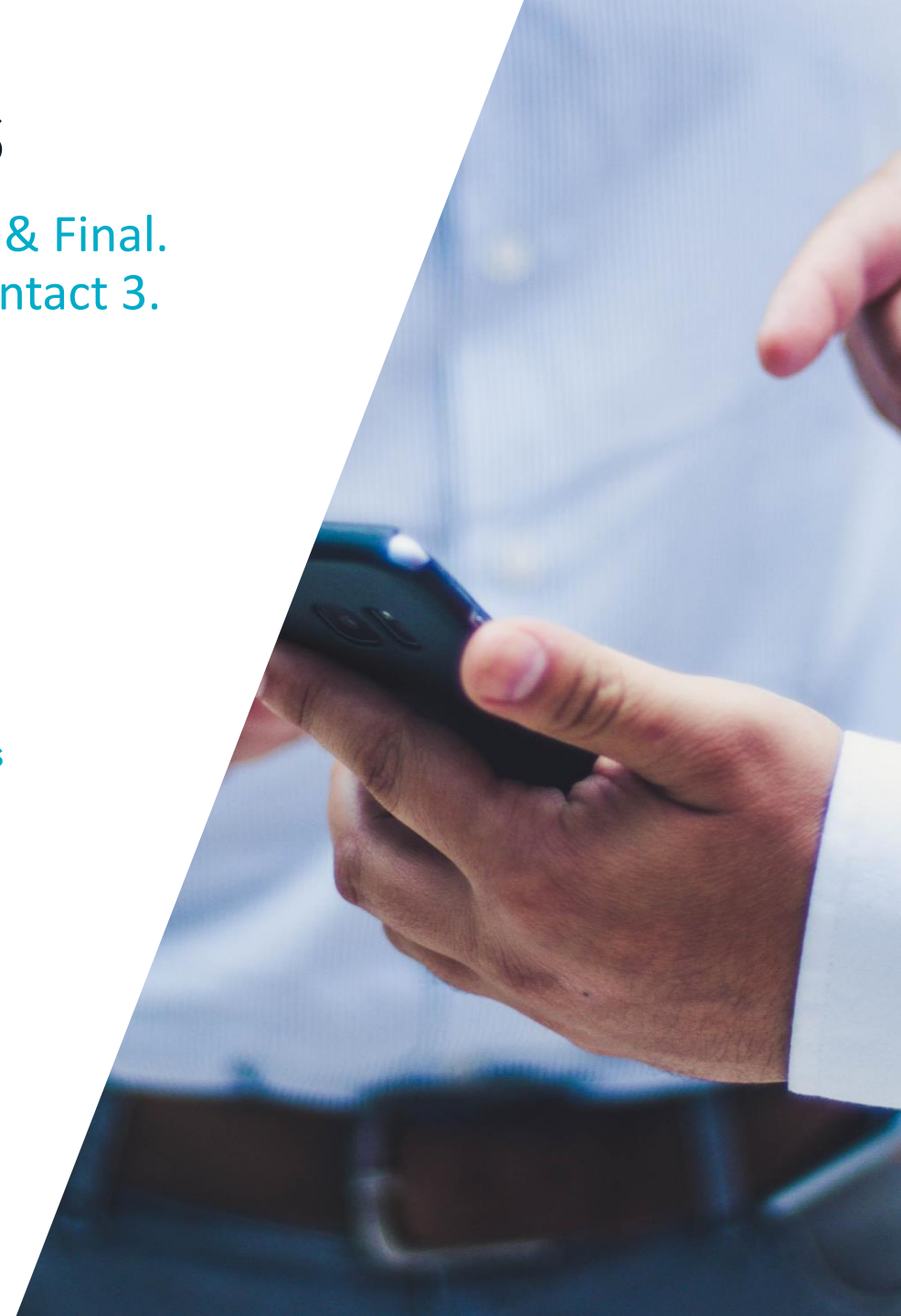
- Manual Service Alerts are manually submitted by Smart & Final Team Members to communicate specific opportunities in the store.

Automated Service Alerts

Auto-generated based on out-of-stock data provided by Smart & Final.
Follow a direct escalation path of Contact 1 → Contact 2 → Contact 3.

Automated Alert Criteria (PI Out of Stocks):

- Five or more **ad items** out of stock
- Five or more **priority items** out of stock
- Twenty or more items out of stock
- Five or more items out of stock for **seven or more consecutive days**



Manual Service Alerts

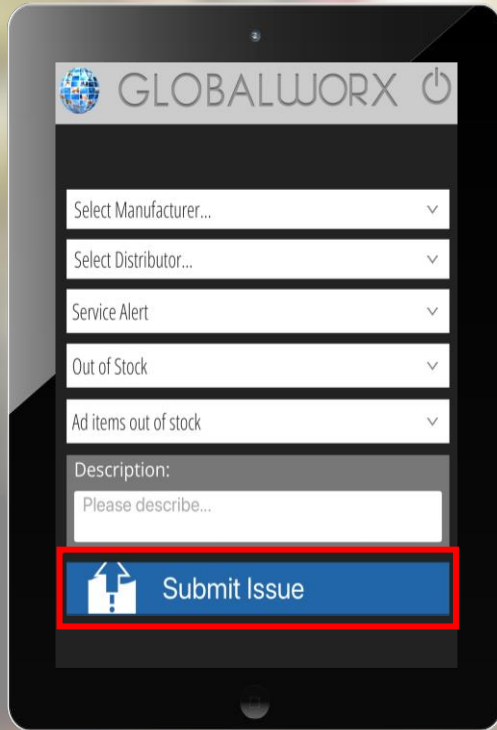
Manual Service Alerts are created by Store Team Members when they see an opportunity in the store and follow a direct escalation path of **Contact 1 → Contact 2 → Contact 3**.

Manual Service Alerts

- **Out of Stock**
 - Ad Items out of stock
 - Priority Items out of stock
 - Excessive out of stock in one section
- **Out of Date**
 - Excessive product for returns
 - Out of date product on shelf
- **Inventory**
 - Excessive inventory in backroom
- **Need Merchandising**
 - Shelf low, product in backroom
 - Display low, product in backroom
 - Product on display, shelf low
 - Order in backroom, excessive time
- **Missed Service**
 - Missed Delivery
 - Missed Merchandising
 - Missed Delivery/Merchandising

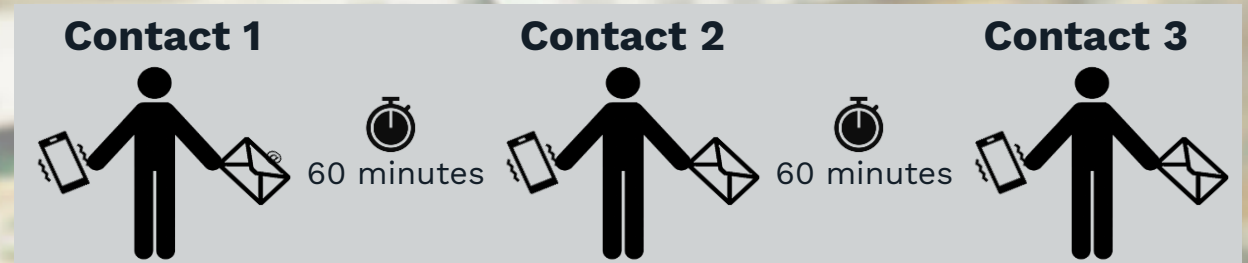
Service Alerts

Service Alerts follow a direct escalation path of **Contact 1 → Contact 2 → Contact 3**. 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. At the top, there's a header with the GlobalWorx logo and a power icon. Below the header, there are several dropdown menus: 'Select Manufacturer...', 'Select Distributor...', 'Service Alert', 'Out of Stock', and 'Ad items out of stock'. Below these is a 'Description:' section with a text input field labeled 'Please describe...'. At the bottom, there is a blue button with a white icon of a person holding a phone and a document, labeled 'Submit Issue'. This button is highlighted with a red rectangular border.

Retailer View



Escalated Service Alerts

All 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
- Need Merchandising
- Out of Date
- Inventory
- Missed Service

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

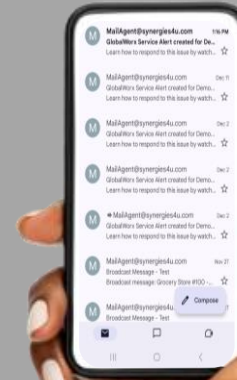
[Click here to respond to this issue *](#)

Receiving Service Alerts

Vendor Contacts are notified of a Service Alert via:



Interactive Voice Response
phone call



Email from
MailAgent@Synergies4U.com

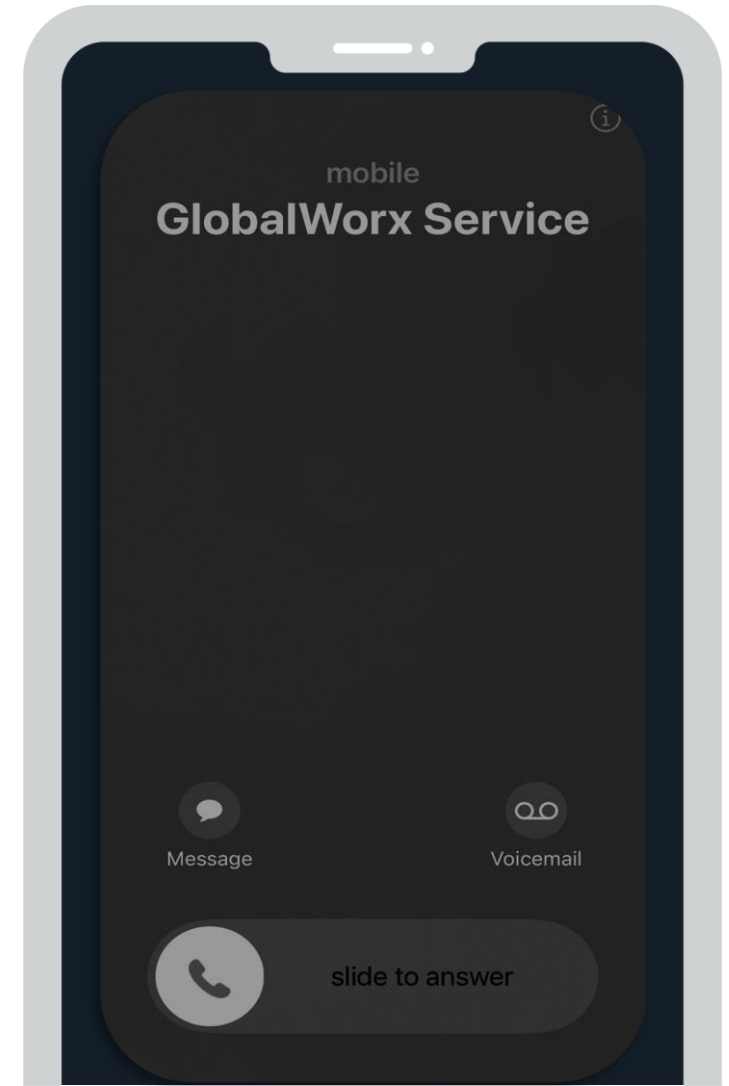
Receiving Service Alerts

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.

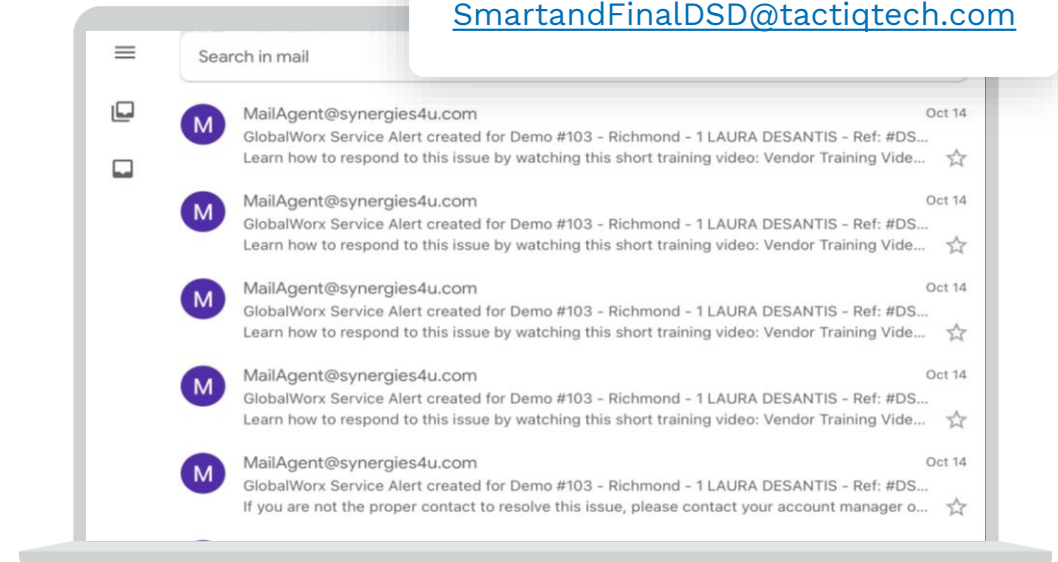
- All Service Alert emails will come from

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.

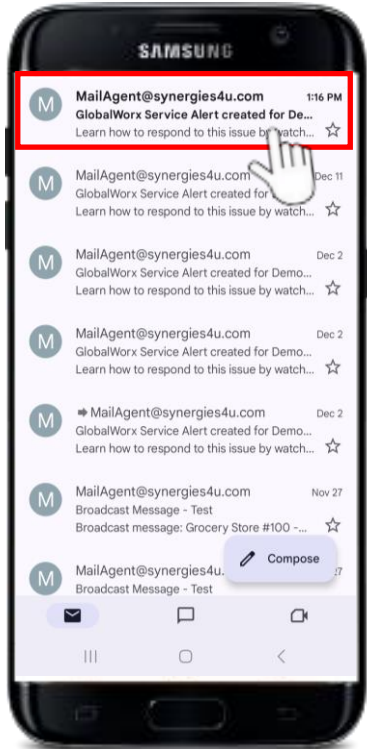
Need to update your contacts?

Please reach out to our Account Services team at SmartandFinalDSD@tactiqtech.com

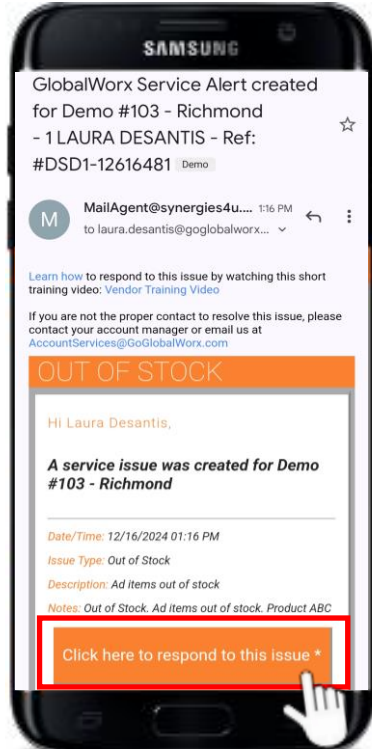


Accepting Service Alerts

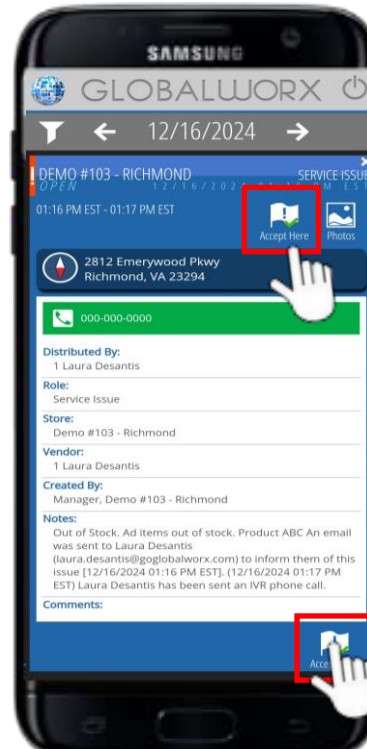
Follow the steps below to **accept** a Service Alert:



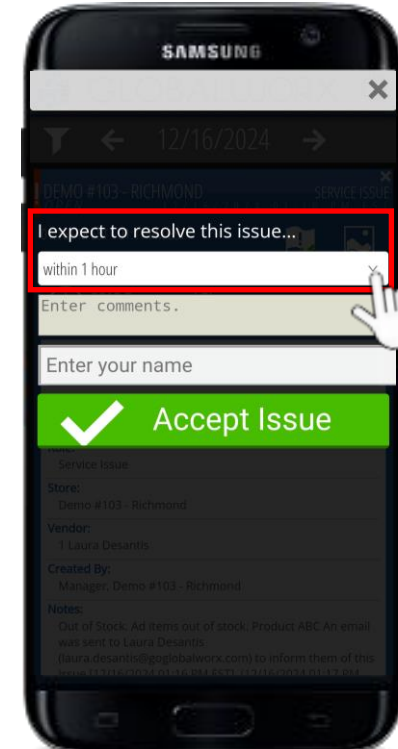
Find the **service alert email**



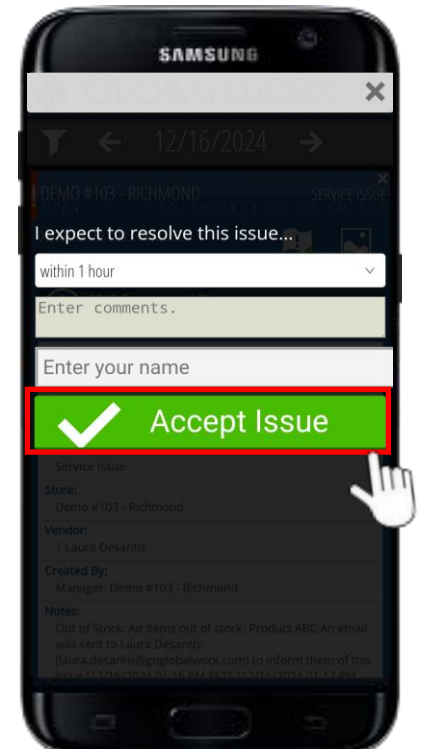
Select **"Click here to respond to this Issue"**



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



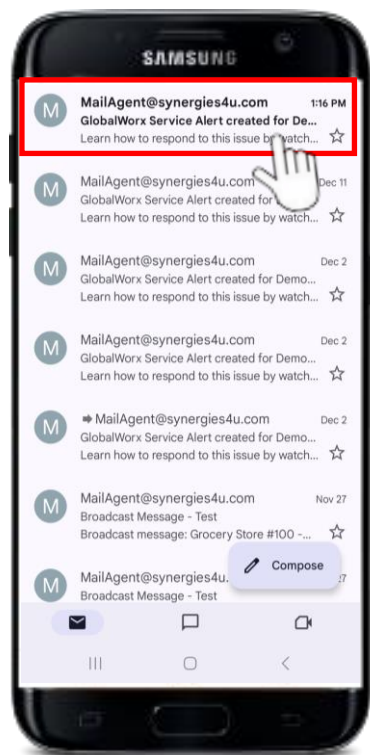
Select the **time frame** you will resolve the Service Alert



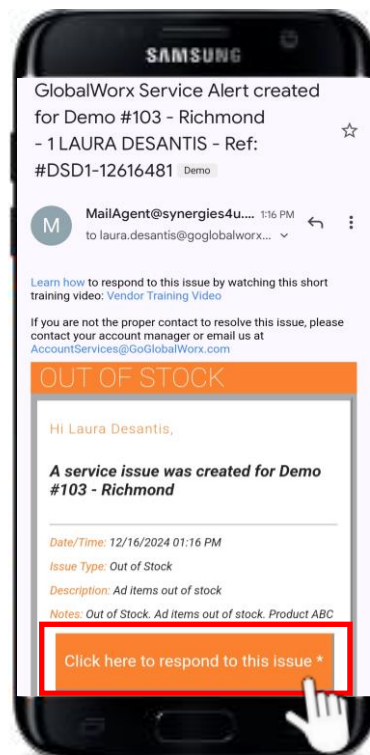
Enter your name and select **"Accept Issue"**

Completing Service Alerts

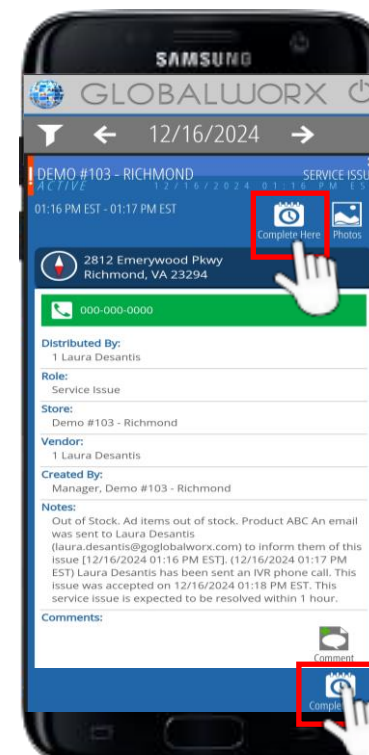
Follow the steps below to **complete** a Service Alert:



Find the **service alert email**



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



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

Completing Service Alerts

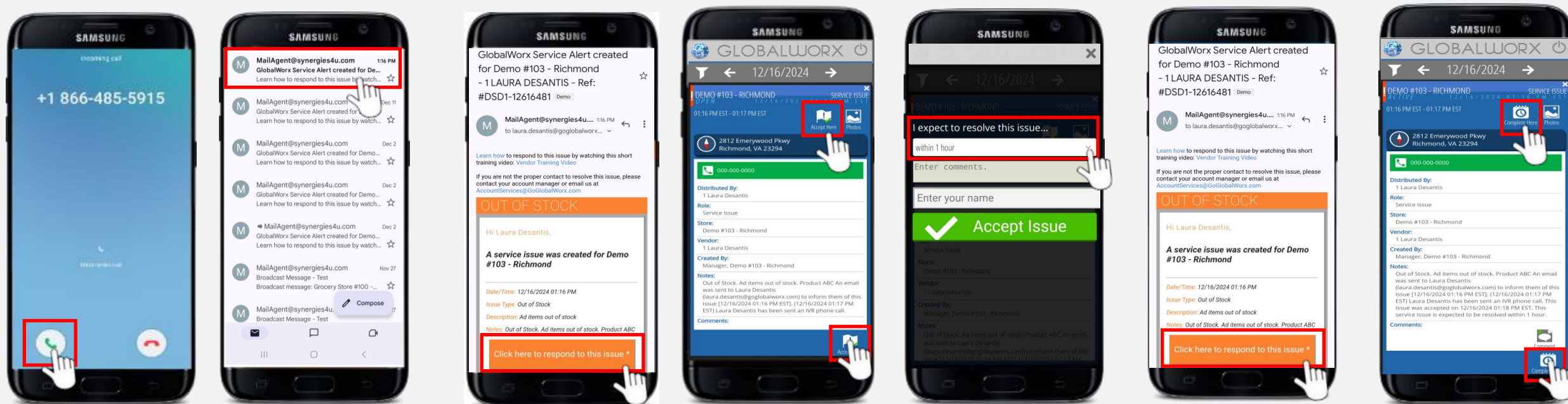
Once an escalated alert is created, you will have **48 hours** to complete the alert in the GlobalWorx Platform. **If an alert is not completed within 48 hours, it will be marked as a Missed Alert.**



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

Smart & Final Service Alert Guide

Step-by-Step Guide To Accepting & Completing Service Alerts



RECEIVING AN ALERT

IVR Phone call: (866) 485-5915

- Description of the service alert
- Verbally prompted steps on how to ACCEPT Service Alerts

Email: MailAgent@Synergies4U.com

- Additional service alert details
- ACCEPT AND COMPLETE Service 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 Service 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 SmartandFinalDSD@tactiqtech.com.*

COMPLETING AN ALERT

Click the link to open the Service Alert from the original email. Select one of the "Complete Here" icons.

Note: 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

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		
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) 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]

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) 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) 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 *

Contact Us

Account Services:

SmartandFinalDSD@tactiqtech.com

Account Manager: **Jackie Orellana**

Jackie@tactiqtech.com