



M360 Best Practices

Anheuser-Busch

Agenda

1. Support
2. M360 Overview
3. Call Frequency
4. M360 Power Usage & AOE
5. M360 Power Feature Breakdown
6. Team Lead Work With Survey
7. Best Practices
8. Top 3 Support Tickets



Support

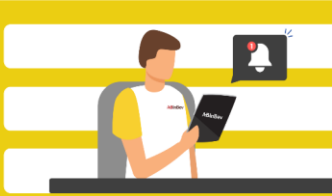


Support Center: Salestechsupport.com

Sign in

Welcome to the

WSLR Tech Help Center



How can we help?

AB Analytics	Brewbox360	M360
ABWP	EDGE	M360 Light
AOE	Incentives	Master Account List
BEES	IRIS	OnePortal
Shelf IQ		

Support Documentation

[How to Submit & Manage Tickets](#)

[OnePortal Walkthroughs, Guides, FAQs, Tutorial Videos, and Feature Voting](#)

[Shelf IQ Walkthroughs & Guides](#)

[IRIS Training](#)

[Survey Training](#)

[M360 Walkthroughs & Guides](#)

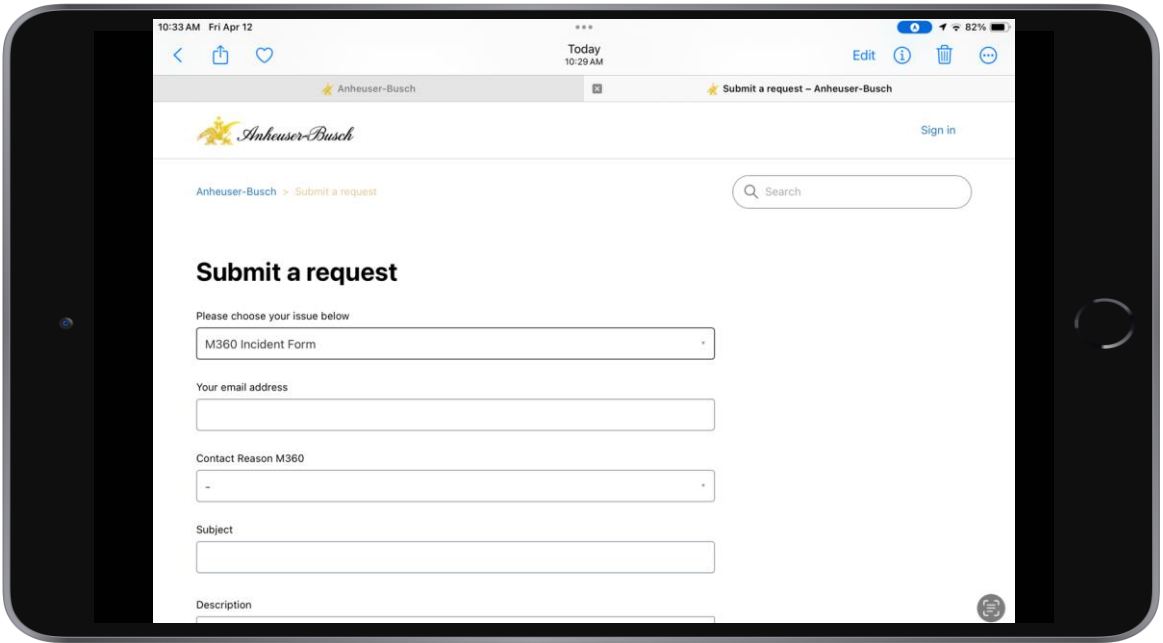
AOE Support Pages

For AOE Support, [2024 AOE Book, Recorded Trainings, AOE Dashboard](#)

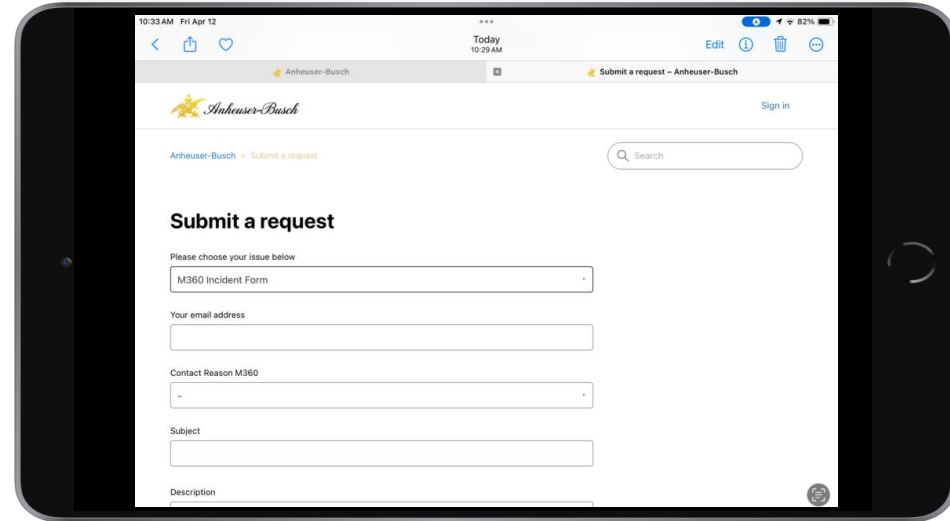
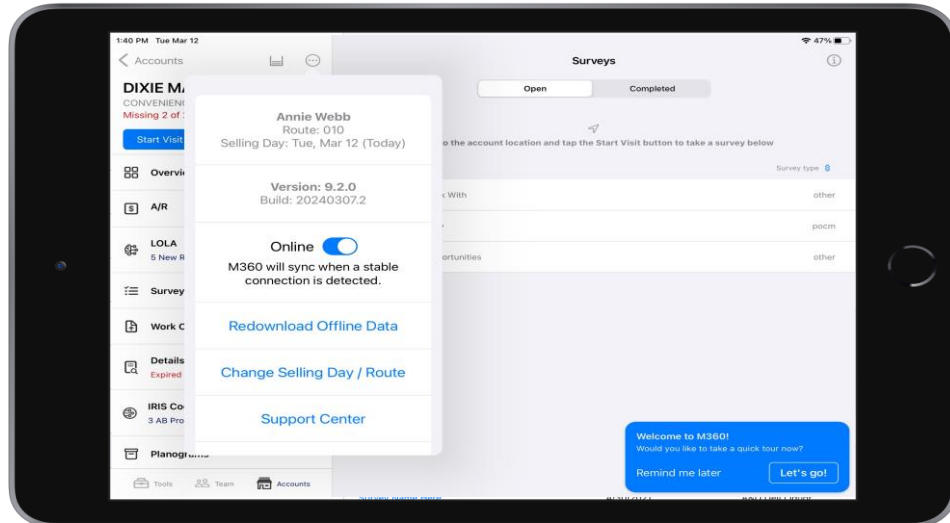
Support Hours

7AM to 7PM EST
Monday - Friday

11AM to 8PM EST
Holidays/Weekends



Support Center is found under the App Menu Icon



Use the App Menu icon in the top right (circle with 3 dots) to:

- 1. View your route information, version and build numbers**
- 2. Manually place the app into offline mode if you are in an area of bad connectivity**
- 3. Start a redownload of offline data via the “Redownload Offline data” button**
- 4. Change Selling Day / Route (which also will download again)**
- 5. Report any issues or suggestions you have via the “Support Center” button**

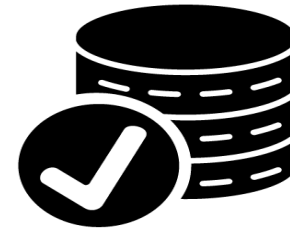
M360 Overview



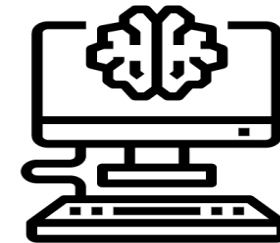
M360 is focused on evolving our Sales Reps to Business Consultants

Mission:

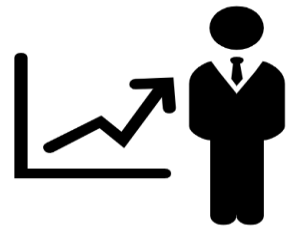
M360 will evolve into a BDR Tech Ecosystem providing our users with accurate and actionable **insights to make informed decisions** at retail and navigate the Digital Sales Evolution



Ensure M360
Stability



Dynamic
Tasking



Sales Rep to
BDR Evolution



ABWP

MAL
Master Account List

Call Frequency

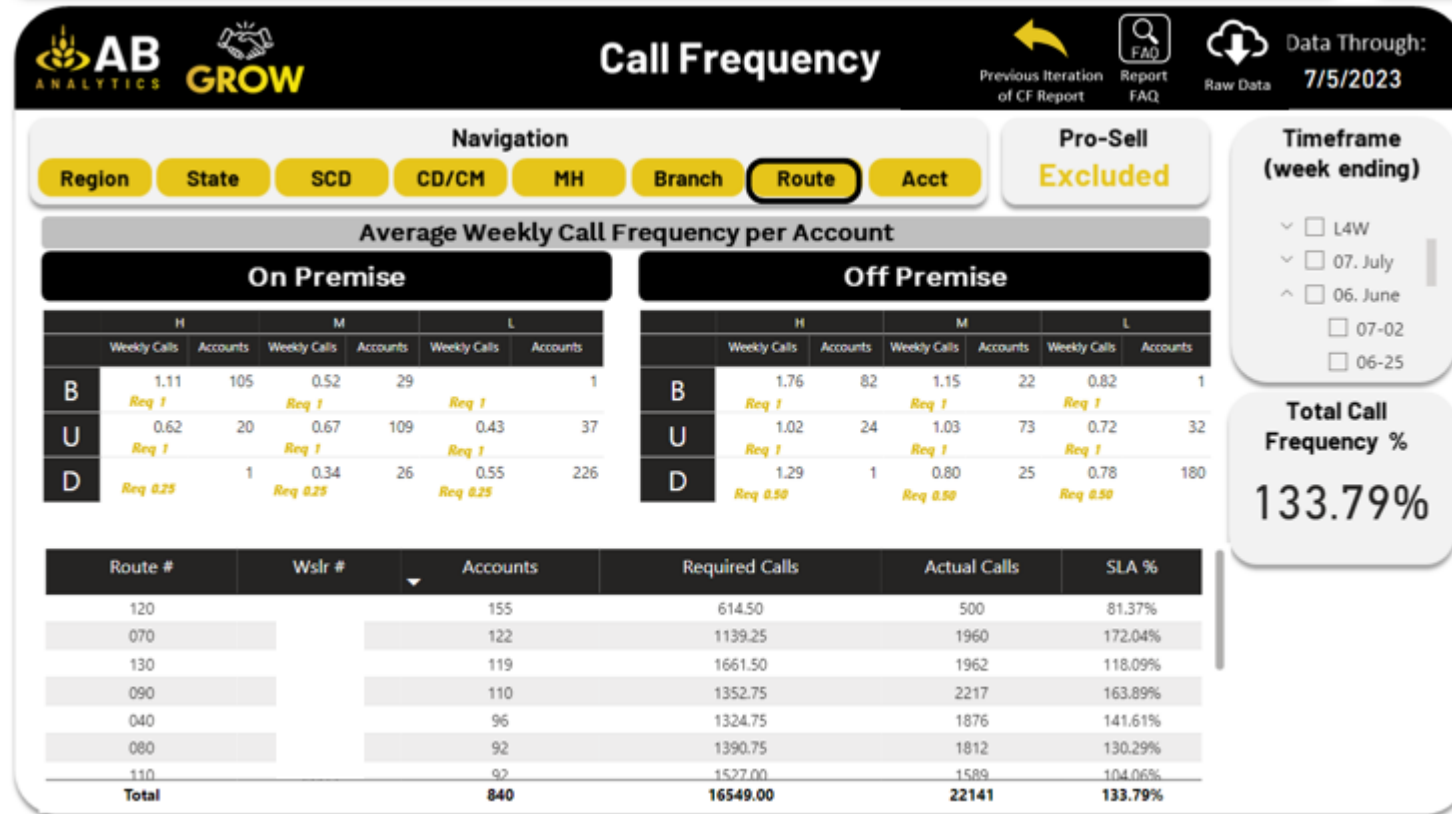


Call Frequency

Location: Acct Segm & Sales Process → Call Frequency

Date Added: Jan 1, 2023

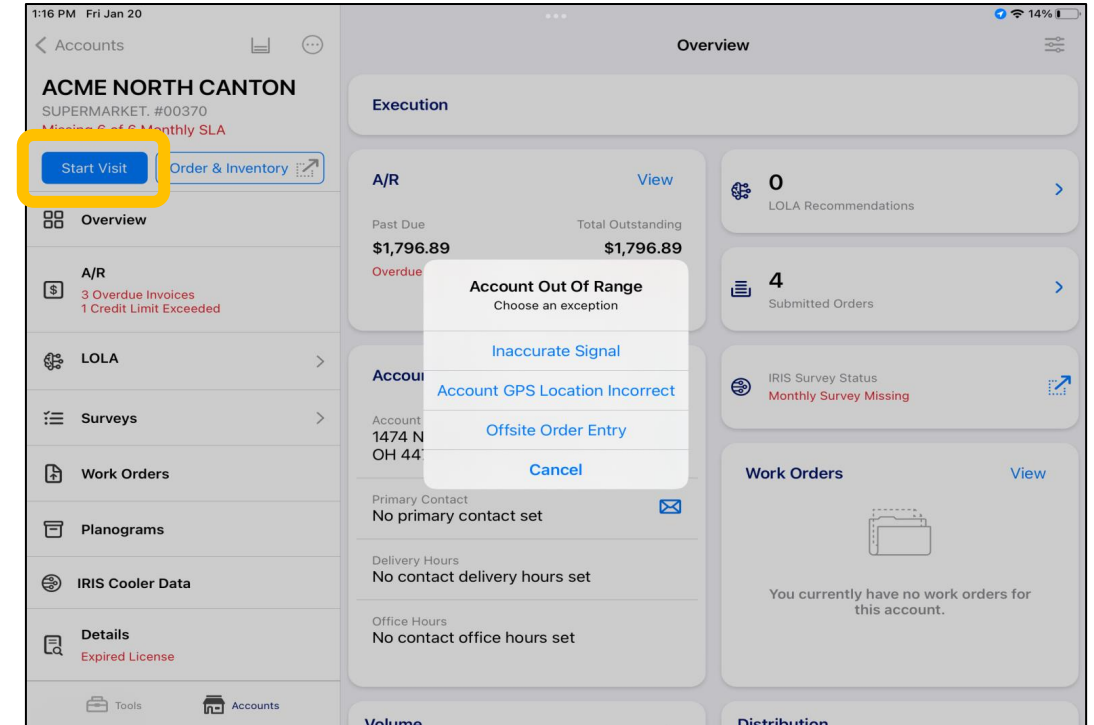
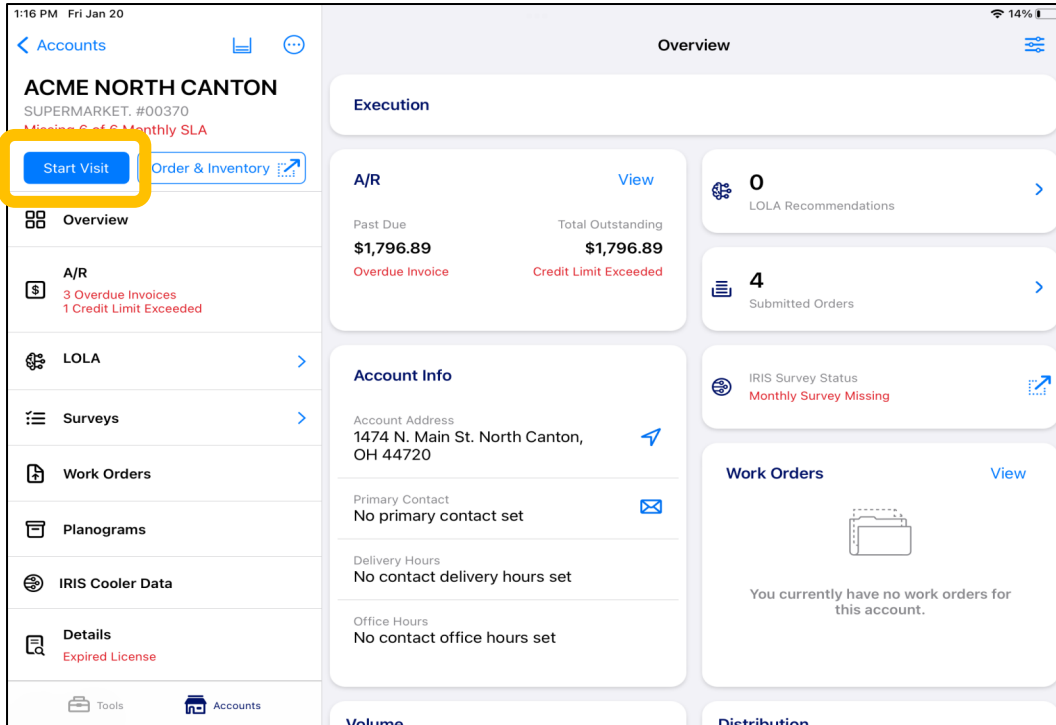
Data Source: M360



Report Overview

Review M360 start stop data to track weekly standard call frequency requirements for BUD accounts. View the required visits by call type along side the number of accounts that fall into each breakdown.

Start Visit: “In Range” vs. “Out of Range”



Successful “Start Visit” (in range) will change the blue “Start Visit” to a red “End Visit”

Because the user is out of GPS range (>1000m) when hitting “Start Visit”, they must choose an exception.

Start Visit: In Range

1:16 PM Fri Jan 20

[Accounts](#)

ACME NORTH CANTON

SUPERMARKET. #00370

Missing 6 of 6 Monthly SLA

1

Start Visit

Order & Inventory

Overview

A/R

3 Overdue Invoices

1 Credit Limit Exceeded

LOLA

Surveys

Work Orders

Planograms

IRIS Cooler Data

Details

Expired License

Tools

Accounts

Overview

Execution

A/R

Past Due

\$1,796.89

Overdue Invoice

Total Outstanding

\$1,796.89

Credit Limit Exceeded

View

0

LOLA Recommendations

4

Submitted Orders

IRIS Survey Status

Monthly Survey Missing

Work Orders

View

You currently have no work orders for this account.

Account Info

Account Address

1474 N. Main St. North Canton, OH 44720

Primary Contact

No primary contact set

Delivery Hours

No contact delivery hours set

Office Hours

No contact office hours set

Volume

Distribution

M360 Process

1 Click the “Start Visit” button.

Successful “Start Visit” will change the blue “Start Visit” to a red “End Visit”

End Visit: In Range

1:16 PM Fri Jan 20
< Accounts

ACME NORTH CANTON
SUPERMARKET. #00370
Missing 6 of 6 Monthly SLA

2

End Visit

Order & Inventory

Overview

A/R

3 Overdue Invoices
1 Credit Limit Exceeded

LOLA

Surveys

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IRIS Cooler Data

Details

Expired License

Tools
Accounts

Overview

Execution

A/R

Past Due
\$1,796.89
Overdue Invoice

Total Outstanding
\$1,796.89
Credit Limit Exceeded

View

0

LOLA Recommendations

4

Submitted Orders

Account Info

Account Address
1474 N. Main St. North Canton,
OH 44720

Primary Contact
No primary contact set

Delivery Hours
No contact delivery hours set

Office Hours
No contact office hours set

IRIS Survey Status
Monthly Survey Missing

Work Orders

View

You currently have no work orders for this account.

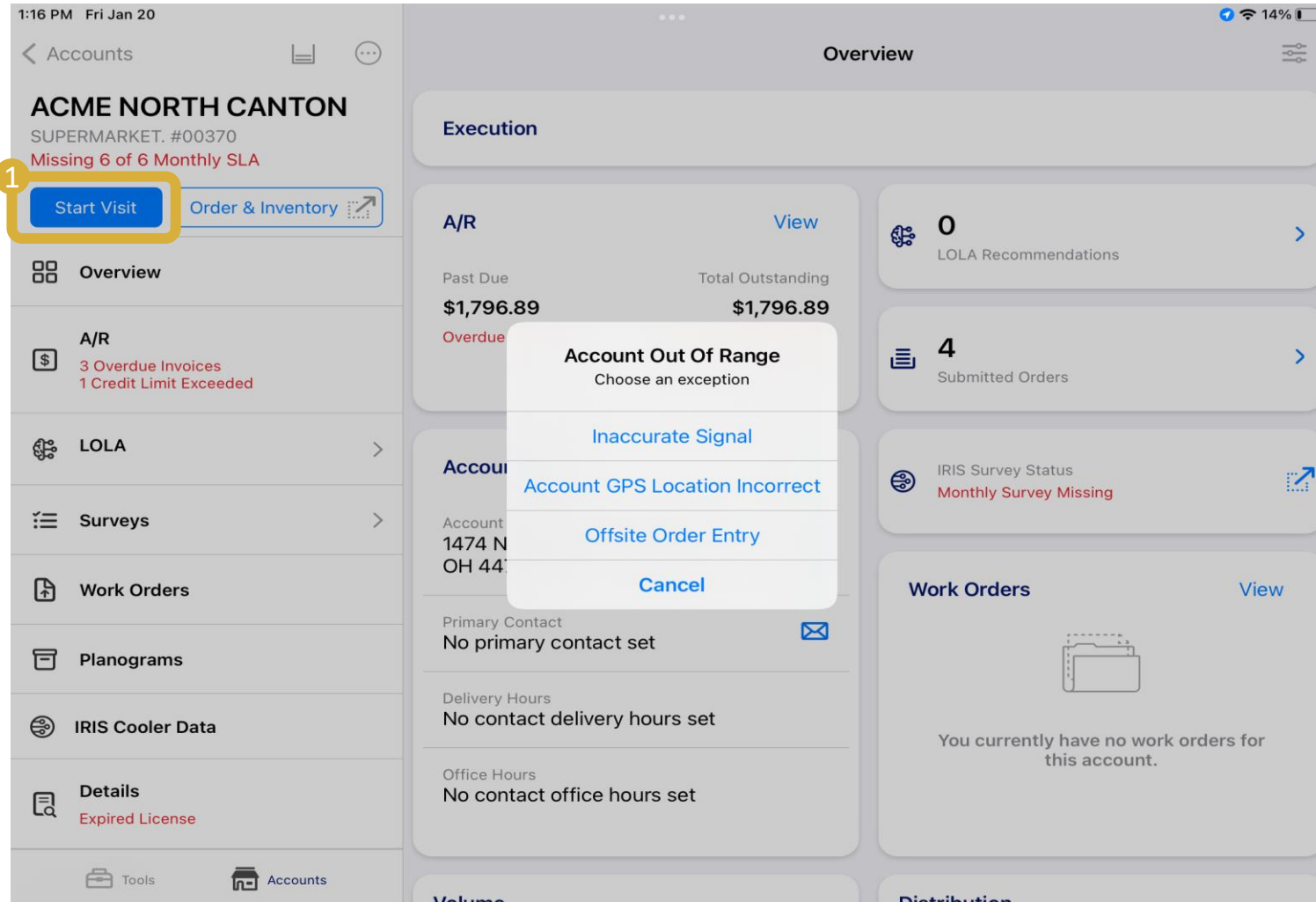
Volume

Distribution

M360 Process

- Click the "Start Visit" button.
Successful check in will change the blue "Start Visit" to a red "End Visit"
- Click the "End Visit" button.
Successful check out will change the red "End Visit" to a dark blue "Edit Visit"

Start Visit: Out of Range



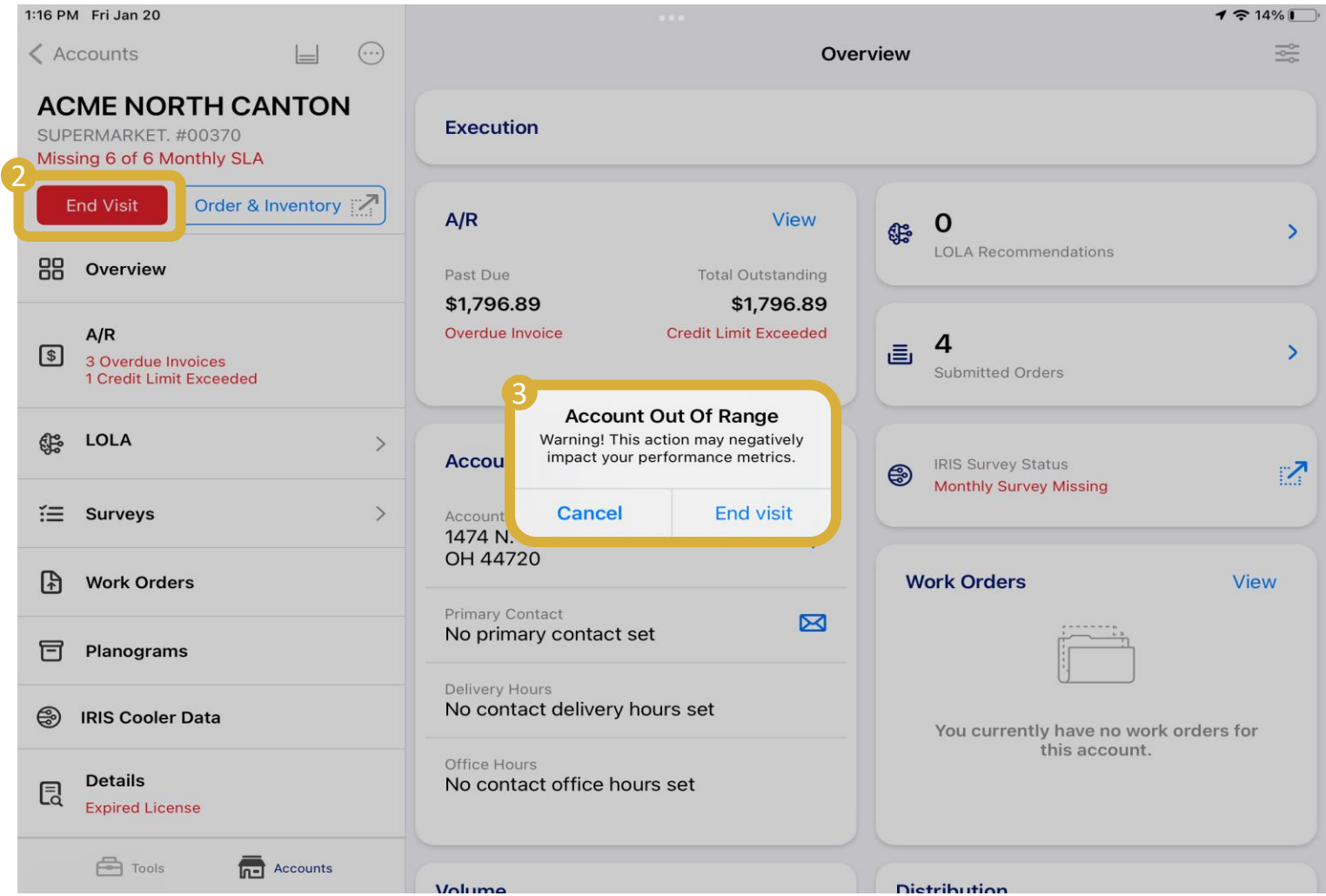
M360 Process

- 1 Click the "Start Visit" button.

Because the user is out of GPS range (>1000m) the user must choose an exception.

- ☐ Inaccurate Signal
- ☐ Account GPS Location Incorrect
- ☐ Offsite Order Entry

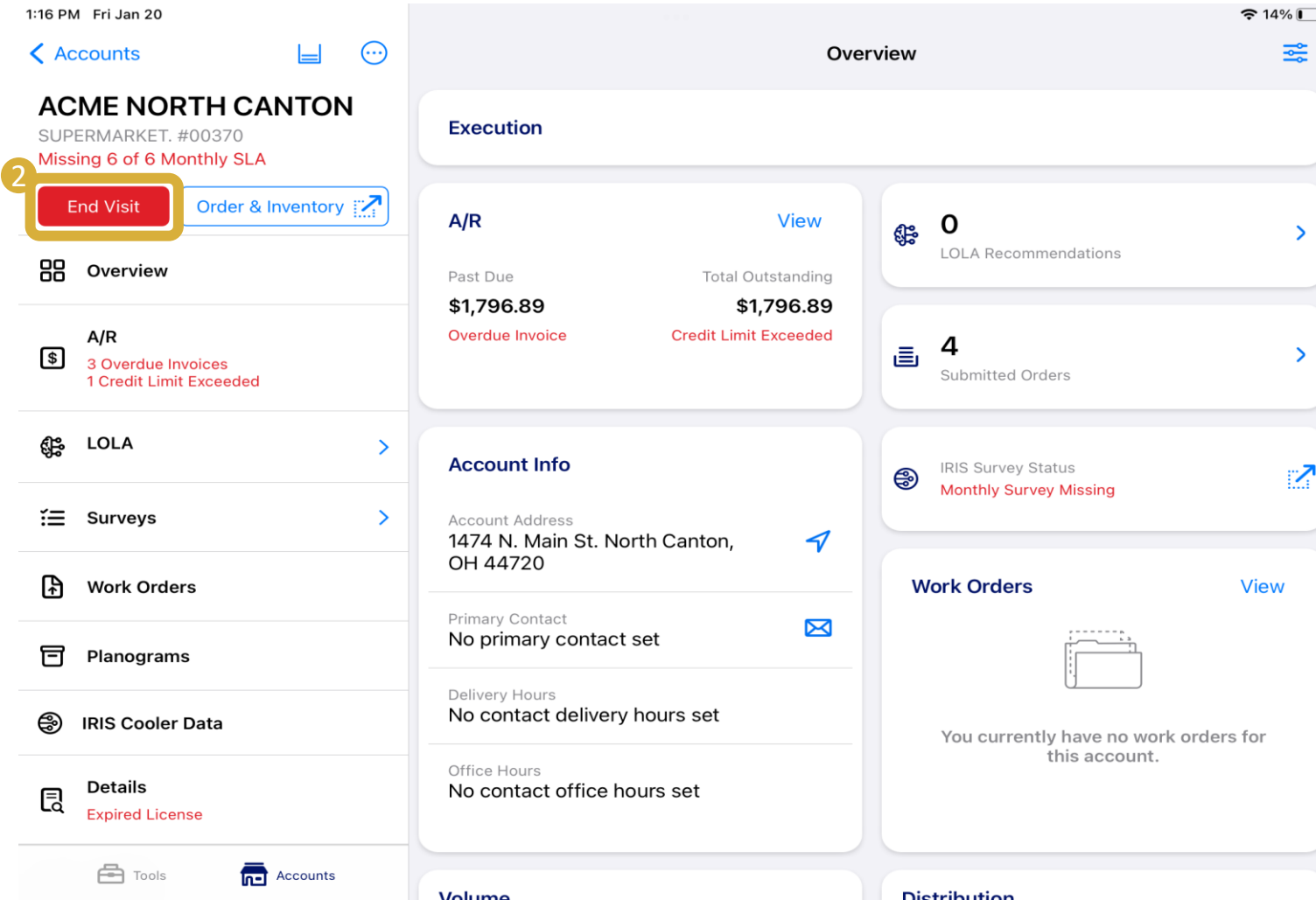
End Visit: Out of Range



M360 Process

- 1 Click the “Start Visit” button.
Because the user is out of GPS range (>1000m) they must choose an exception.
-  Inaccurate Signal
 -  Account GPS Location Incorrect
 -  Offsite Order Entry
- 2 Click the “End Visit” button.
- 3 If the user is **STILL OUT OF RANGE**, they will receive this error message.

End Visit: In Range (After out of range Start Visit)



The screenshot shows the M360 mobile app interface for an account named 'ACME NORTH CANTON'. The account is marked as 'Missing 6 of 6 Monthly SLA'. The 'End Visit' button is highlighted with a yellow box and a red '2' in a circle. The interface includes a sidebar with navigation options: Overview, A/R, LOLA, Surveys, Work Orders, Planograms, IRIS Cooler Data, and Details. The main content area shows an 'Overview' screen with sections for Execution, Account Info, and Work Orders. The 'Execution' section displays 'A/R' with 'Past Due' and 'Total Outstanding' amounts of \$1,796.89, and 'Submitted Orders' of 4. The 'Account Info' section shows the account address and contact information. The 'Work Orders' section indicates that there are no work orders for this account.

M360 Process

1 Click the “Start Visit” button.

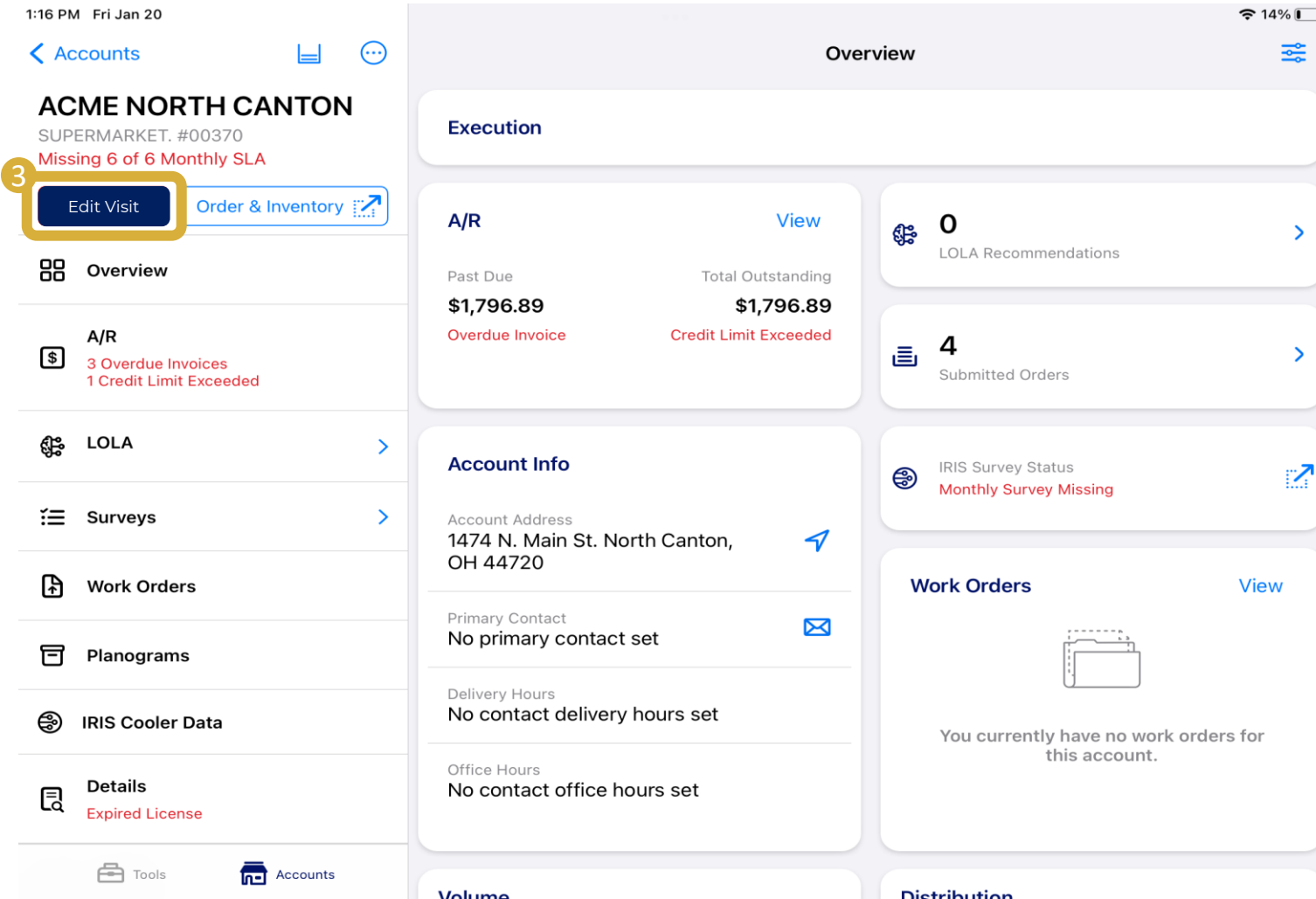
Because the user is out of GPS range (>1000m) they must choose an exception.

-  Inaccurate Signal
-  Account GPS Location Incorrect
-  Offsite Order Entry

2 Click the “End Visit” button.

3 If the user is **IN RANGE** during check out, there will be **no pop-up** message and the red “End Visit” will change to a dark blue “Edit Visit”

End Visit: In Range (After out of range Start Visit)



1:16 PM Fri Jan 20

< Accounts

ACME NORTH CANTON
SUPERMARKET. #00370
Missing 6 of 6 Monthly SLA

3 Edit Visit Order & Inventory

Overview

A/R
3 Overdue Invoices
1 Credit Limit Exceeded

LOLA

Surveys

Work Orders

Planograms

IRIS Cooler Data

Details
Expired License

Tools Accounts

Overview

Execution

A/R View
Past Due \$1,796.89 Overdue Invoice
Total Outstanding \$1,796.89 Credit Limit Exceeded

0 LOLA Recommendations

4 Submitted Orders

IRIS Survey Status
Monthly Survey Missing

Work Orders View
You currently have no work orders for this account.

Account Info
Account Address
1474 N. Main St. North Canton, OH 44720
Primary Contact
No primary contact set
Delivery Hours
No contact delivery hours set
Office Hours
No contact office hours set

Volume Distribution

M360 Process

1 Click the “Start Visit” button.

Because the user is out of GPS range (>1000m) they must choose an exception.

-  Inaccurate Signal
-  Account GPS Location Incorrect
-  Offsite Order Entry

2 Click the “End Visit” button.

3 If the user is **IN RANGE** during check out, there will be no pop-up message and the red “End Visit” will change to a **dark blue “Edit Visit”**

Out of Range Scenarios

-  **Inaccurate Signal:** Cellular connectivity on the iPad is either out of service or in a low service area. GPS location looks wrong, but it is likely correct.
-  **Account GPS Location Incorrect:** User is getting accurate signal and is physically at the account, but the GPS coordinates that M360 has for the account are inaccurate and need to be updated.
-  **Offsite Order Entry:** Sales rep is admitting that they are not physically at the account. They are either putting in an order from scratch or could be adjusting something using their RAS Sales Platform.

When do you receive credit for a physical sales call?

Start Visit	End Visit	SLA Credit	Scenario Description
In Range	In Range	YES	Standard visit, sales rep starts and ends visit while in range.
In Range	Out of Range	YES	Sales rep starts visit in range but ends visit out of range – i.e. rep knows account is out of range, so starts visit a few minutes early.
Out of Range: Inaccurate Signal	In Range	YES	Sales rep starts visit out of range but ends visit in range – i.e. rep has inaccurate signal at account, but ends visit once they get back into service.
Out of Range: GPS Location	In Range	YES	Sales rep starts visit out of range but ends visit in range – i.e. M360 has wrong GPS location for account, but ends visit once within range (unlikely event).
Out of Range: Offsite Order Entry	In Range	YES	Sales rep starts visit out of range but ends visit in range – i.e. rep needs to punch in an order out of range, but then gets to the account and closes out their visit.
Out of Range: Inaccurate Signal	Out of Range	YES	Sales rep starts visit out of range AND ends visit out of range due to inaccurate signal at the account – i.e. rep has inaccurate signal at account and starts and ends visit.
Out of Range: GPS Location	Out of Range	YES	Sales rep starts visit out of range AND ends visit out of range due to inaccurate GPS Location for the account in M360 – i.e. GPS location is off and rep starts and ends visit.
Out of Range: Offsite Order Entry	Out of Range	NO	Sales rep starts visit out of range AND ends visit out range due to necessity of submitting an order – i.e. Sales rep starts and ends visit to submit order without visiting the account.

M360 Power Feature Breakdown



M360 – PFP & Objectives

What is PFP & Objectives?

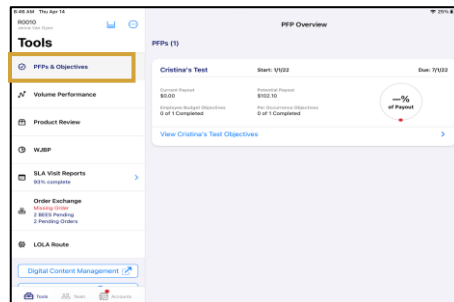
The Pay For Performance (PFP) Overview screen displays wholesaler sales objectives. Sales reps can earn money if they meet specific targets.

Why is it useful?

- Ability to **view Current Payout, Potential Payout, and Total Objective Count**
- Tracking for **budget percentage** and per occurrence objectives
- Ability to view specific **sales rep objective details**
- Automatic **daily updates** to Sales KPIs

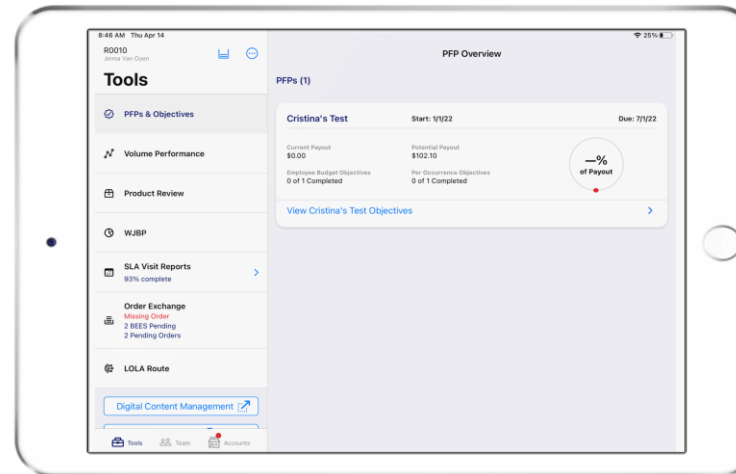
How do I access it?

- 1 M360 home screen
- 2 PFP & Objectives

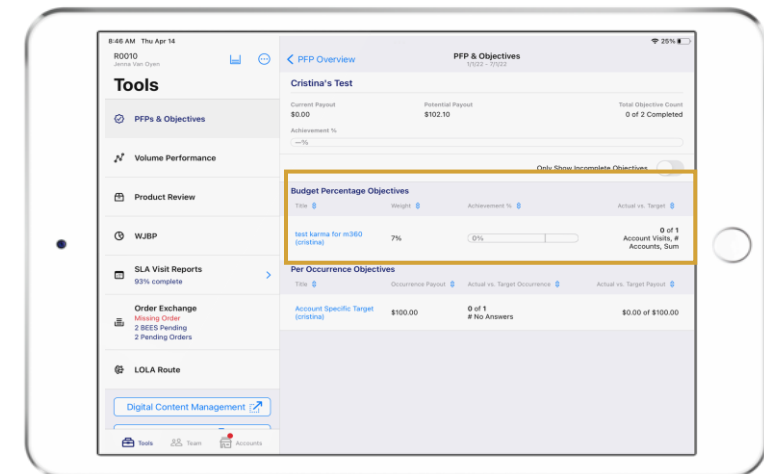


What does it look like?

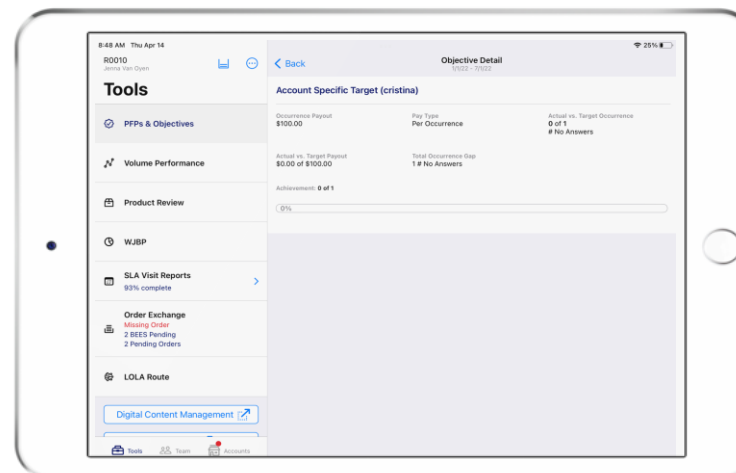
PFP Overview– updated daily



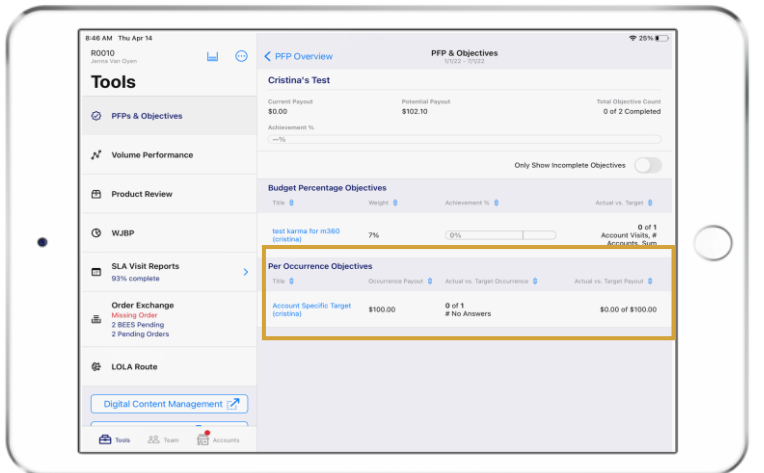
PFP & Objectives– view PFP details by budget percentage



PFP Details



PFP & Objectives– view PFP details by per occurrence



M360 – Order Exchange

What is Order Exchange?

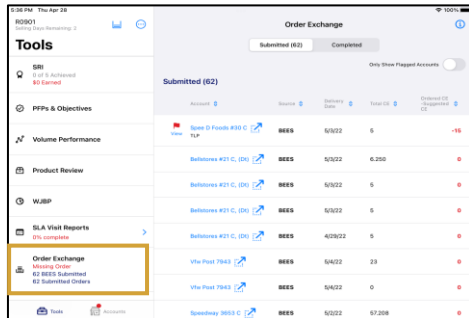
Ability to **view all open orders** across a sales route, regardless of order source. All **open** and editable orders can be found in the **submitted tab** and all recently **delivered orders** can be found in the **completed tab**.

Why is it useful?

- Link directly into the account in your RAS ordering and inventory
- View the source of the order
- View submitted and pending orders with dates and C/Es
- View Flagged items that are Out of Stock or Top Line Protection

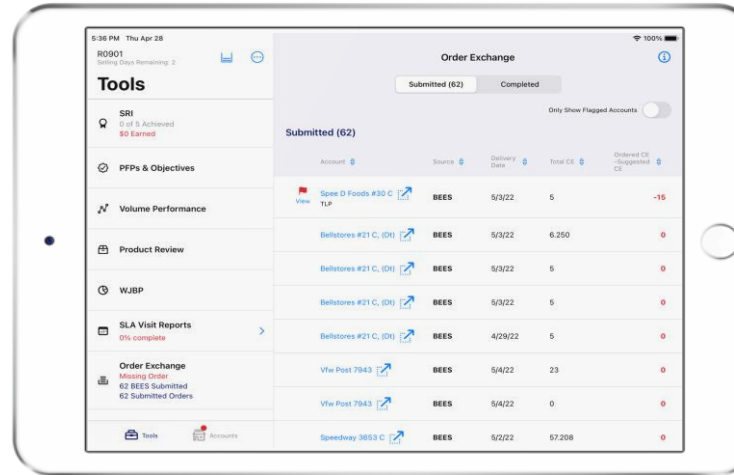
How do I access it?

- 1 M360 home screen
- 2 Order Exchange

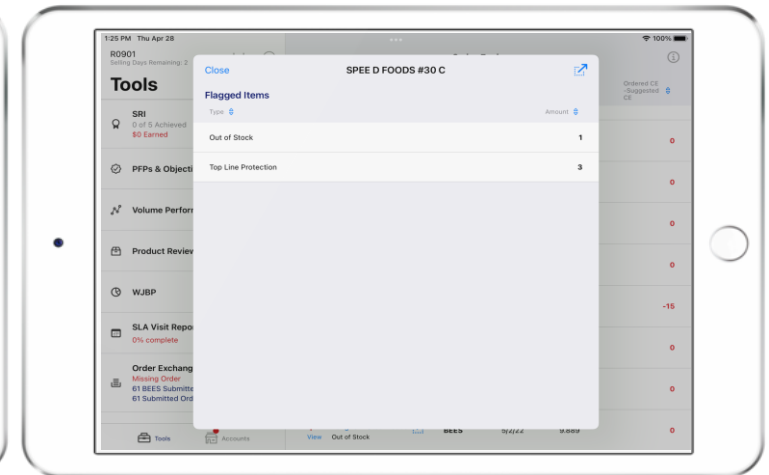


What does it look like?

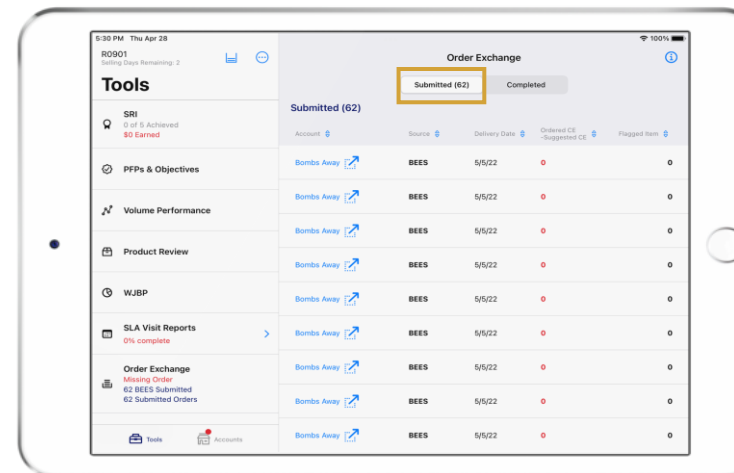
Order Exchange Overview Screen



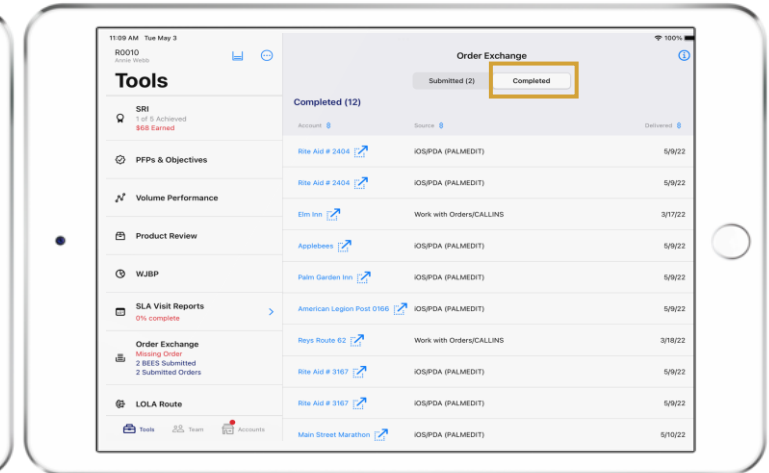
Flagged Items (Out of Stock and TLP)



View submitted orders



View completed orders



M360 – Account Execution (EDGE)

What is Account Execution (EDGE)?

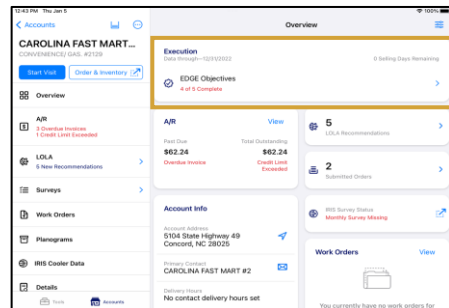
The EDGE objectives will display a list of an account's monthly EDGE objectives along with the status of each objective.

Why is it useful?

- Progress bar for all monthly objectives
- Ability to review all monthly objectives along with their status
- Deep link to survey tool for objective execution
- Ability to challenge an objective and complete surveys

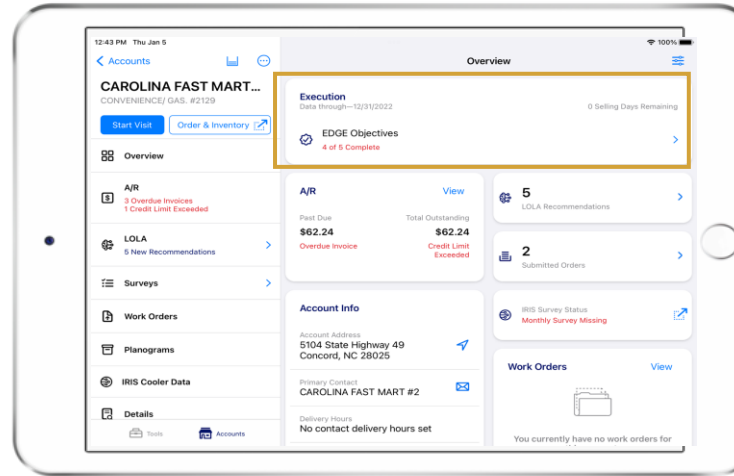
How do I access it?

- 1 M360 home screen
- 2 Account Screen
- 3 Overview/Execution

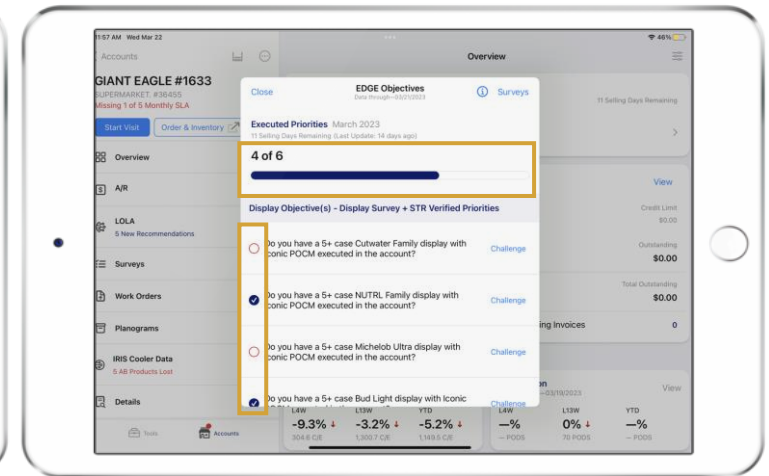


What does it look like?

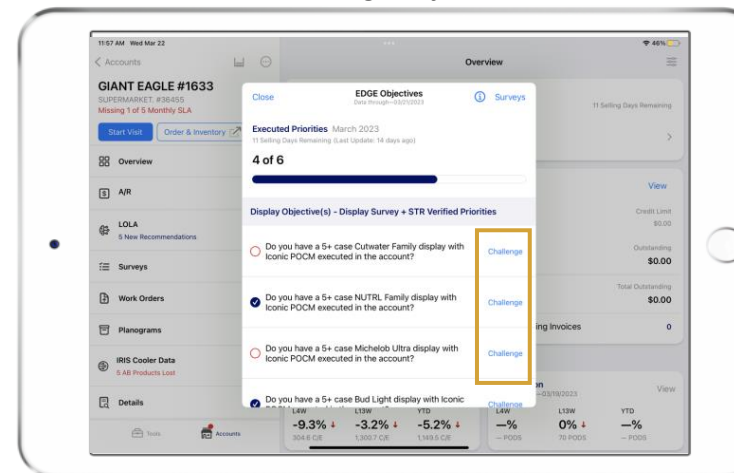
EDGE Objectives Overview Card- Objective completion status



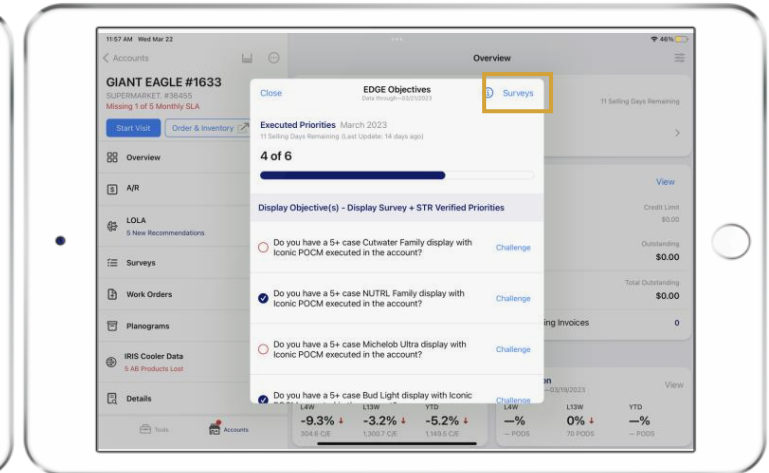
Execution Status- Progress bar, Check marks



Challenge Objectives



EDGE completion surveys



M360 – Account Performance (Volume & Distribution)

What is Account Performance?

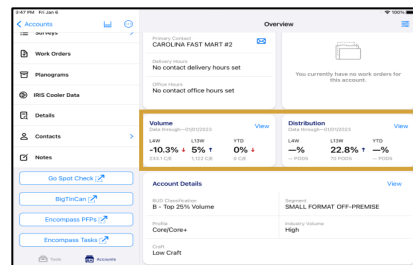
Visibility into **volume** and **distribution** at an account broken down by brand partition, brand, and SKU across multiple time frames.

Why is it useful?

- Incorporates all necessary account volume and distribution data in one place
- Ability to view by Last 4 weeks, Last 13 weeks, and Year to date
- Ability to view by brand partition, brand family, brand, or package
- Ability to see summary information on Account Overview Page
- Enables tracking of an account's volume and distribution trend

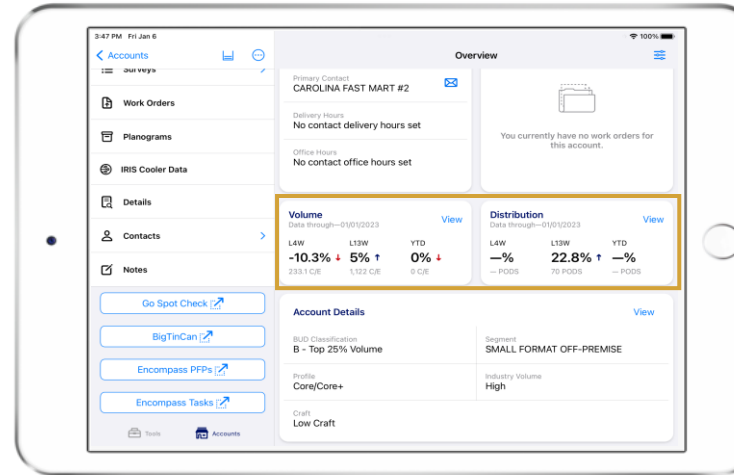
How do I access it?

- 1 M360 home screen
 - 2 Account Screen (located at bottom of screen)
 - 3 Volume or Distribution
- 

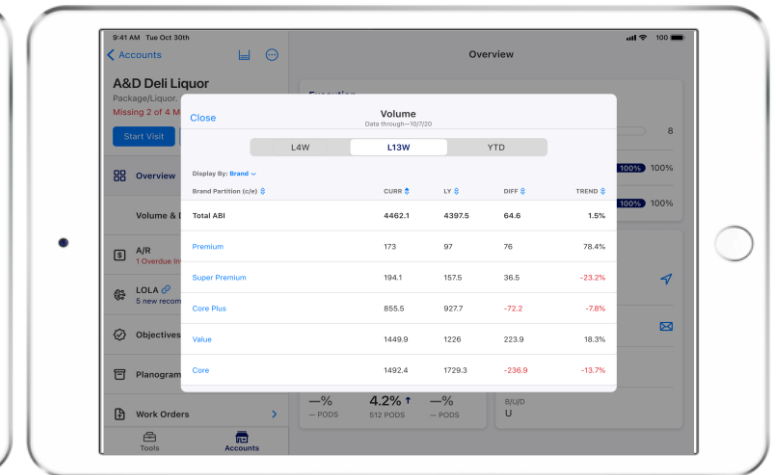


What does it look like?

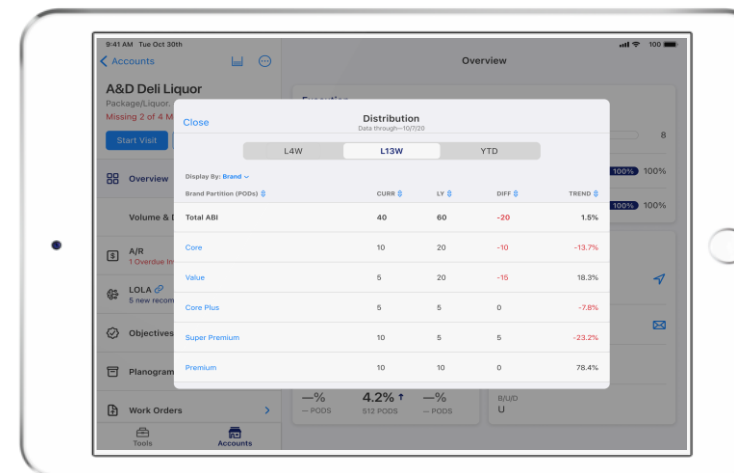
Volume & Distribution – L4W, L13W, YTD



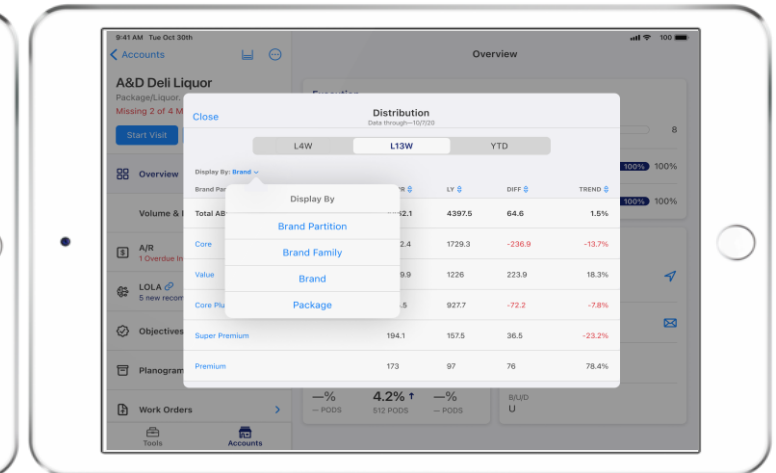
Volume Details – CURR, LY, DIFF, Trend



Distribution Details – CURR, LY, DIFF, Trend



Display By – Brand Partition, Brand Family, Brand, Package



M360 – IRIS Cooler Data

What is IRIS?

Image Recognition software used to generate data and insights from captures of an account's **cooler doors**.

Why is it useful?

- Provides **summary of cooler door data** on IRIS Overview screen
- Ability to view previous IRIS survey submissions
- Ability to drill down into IRIS data by Brand, SKU, and WAMP
- Ability to directly compare IRIS surveys and view product count, share change, etc.
- Ability to only show AB brands

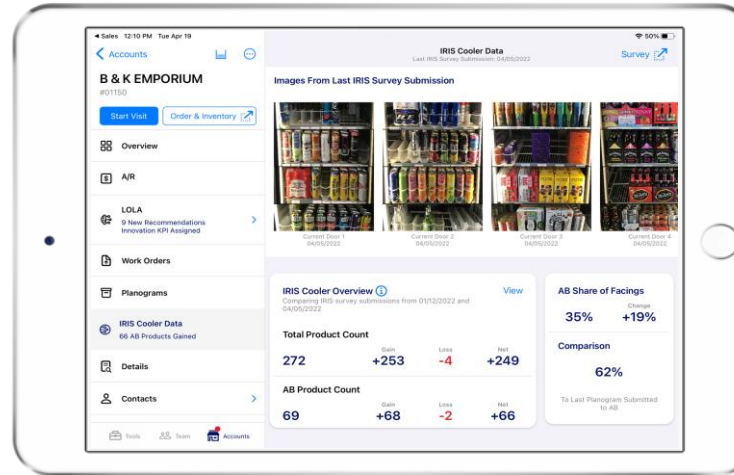
How do I access it?

- 1 M360 home screen
- 2 Account Screen
- 3 IRIS Cooler Data

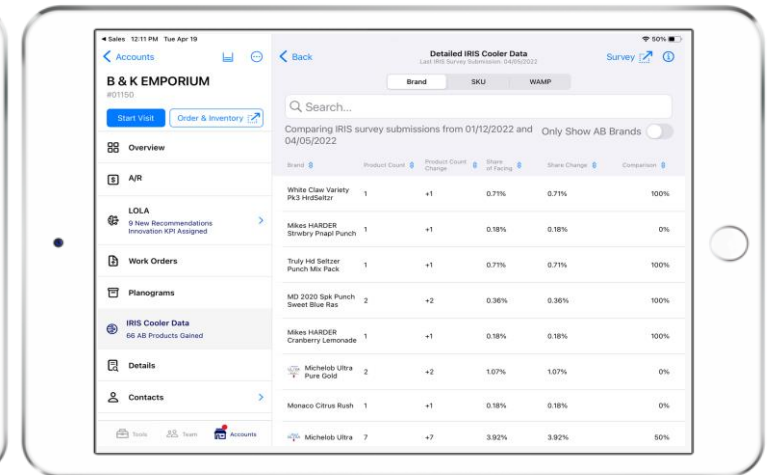


What does it look like?

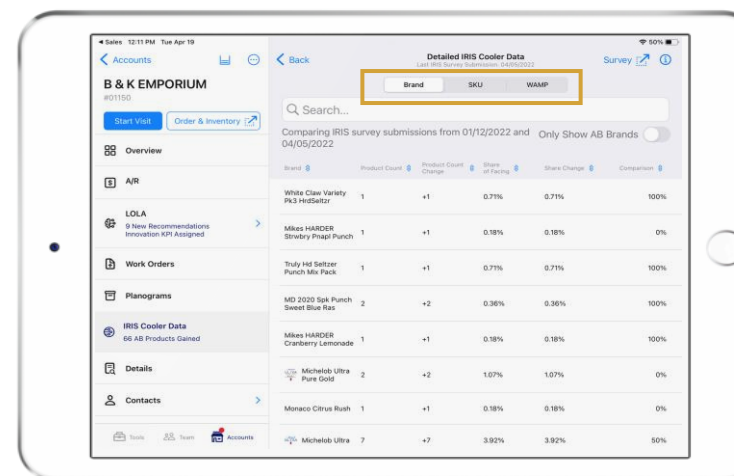
IRIS Cooler Overview- submissions, product statistics, AB Share



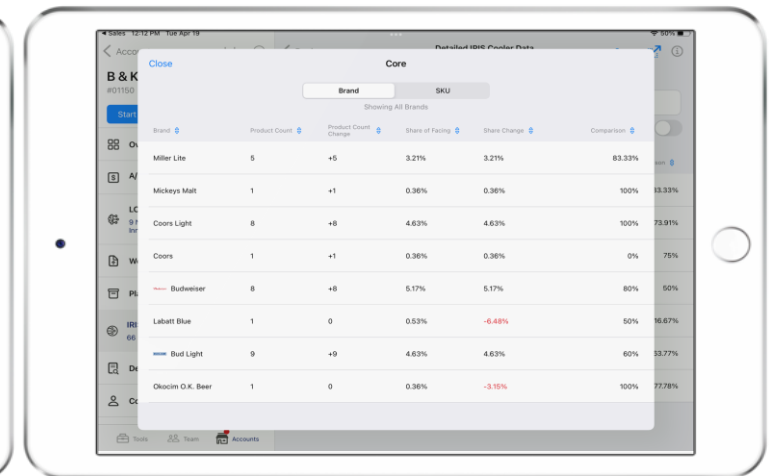
IRIS Cooler Overview Details



IRIS Cooler Overview Details- Brand, SKU, and WAMP



IRIS Cooler WAMP Details



M360 – Planogram Visibility

What is it?

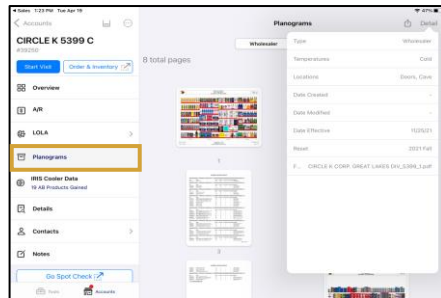
Visibility into wholesaler submitted and chain planograms.

Why is it useful?

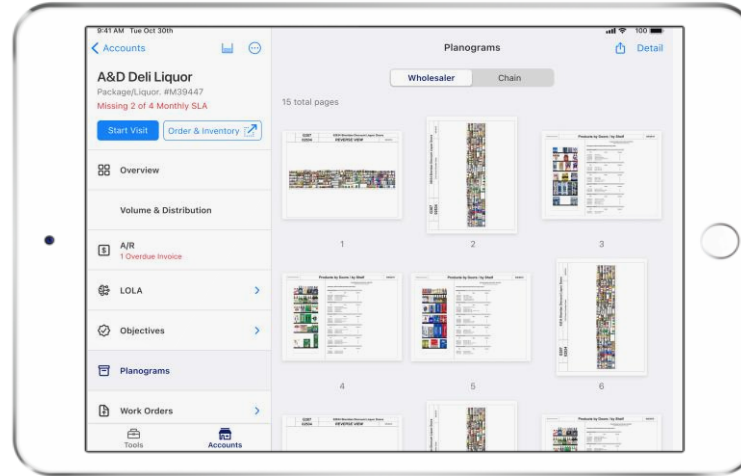
- The ability to compare submitted planograms to what's in the store and identify gaps
- Markup feature which allows you to make notes on the actual planogram
- **Sending markups to the wholesaler space teams and retailers**
- Saves time for space teams, they can build and adjust the planograms from sales rep notes

How do I access it?

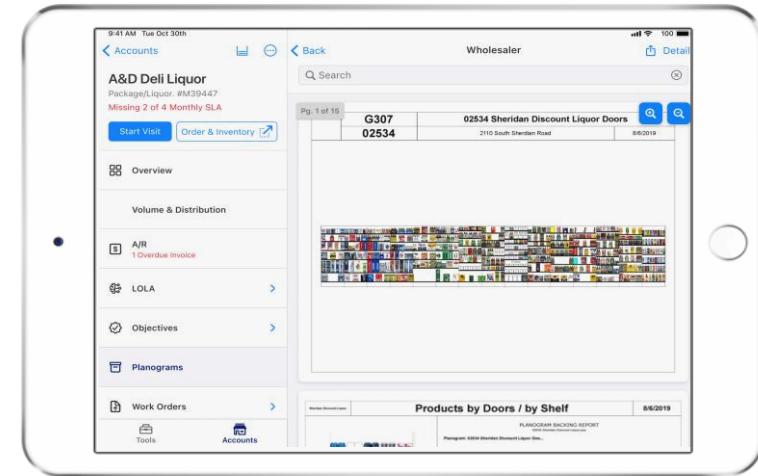
- 1 M360 home screen
- 2 Account Screen
- 3 Planograms Tab



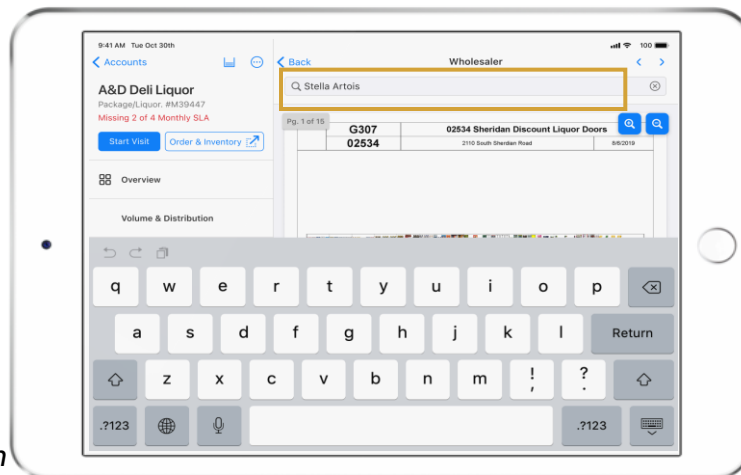
View wholesaler-submitted and chain-authorized planograms



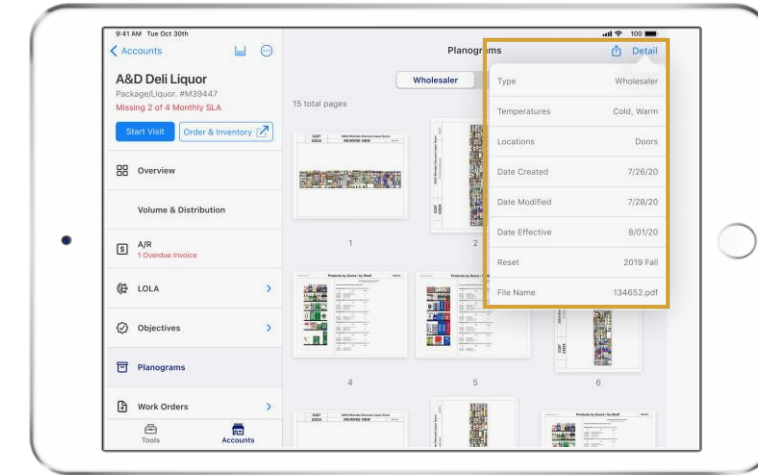
View planogram



Planogram search



View planogram Details



**If no Planogram is available, please reach out to your space team*

M360 – Lead By Style

What is Lead By Style?

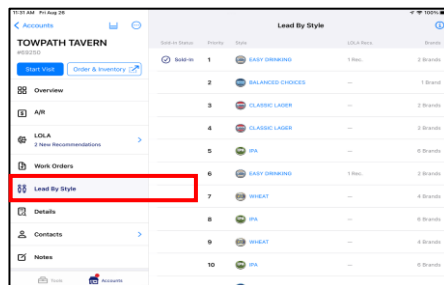
Tracking of draught styles at an on-premise account.

Why is it useful?

- Incorporates all necessary tap information into one place
- Ability to view priority and number of brands for each style
- Ability to view by sold-in status
- Integrated LOLA SKU Recommendations

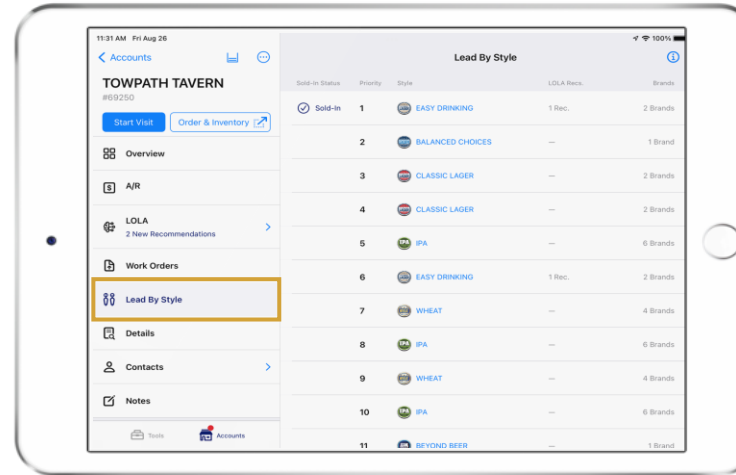
How do I access it?

- 1 M360 home screen
- 2 Account Screen
- 3 Lead By Style

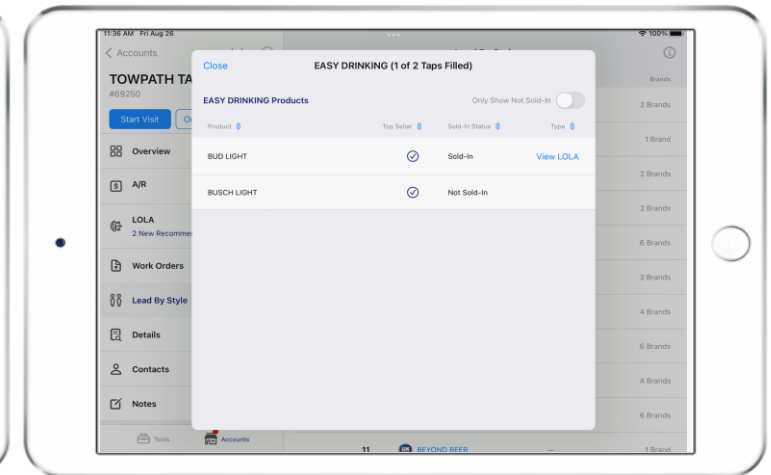


What does it look like?

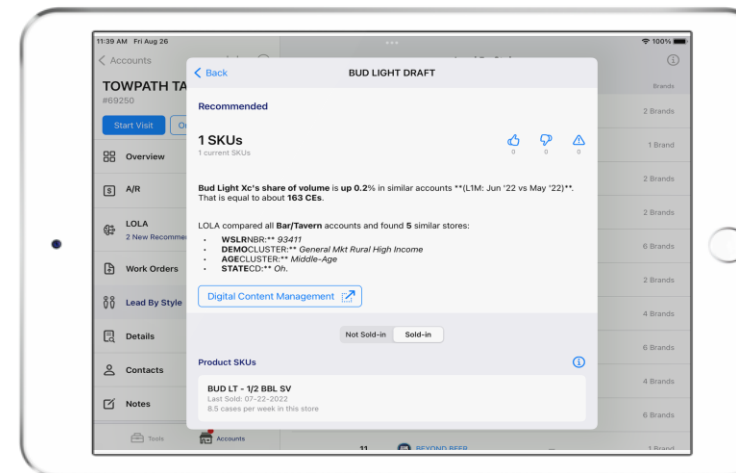
Overview-Status, Priority, Style, LOLA, Brands



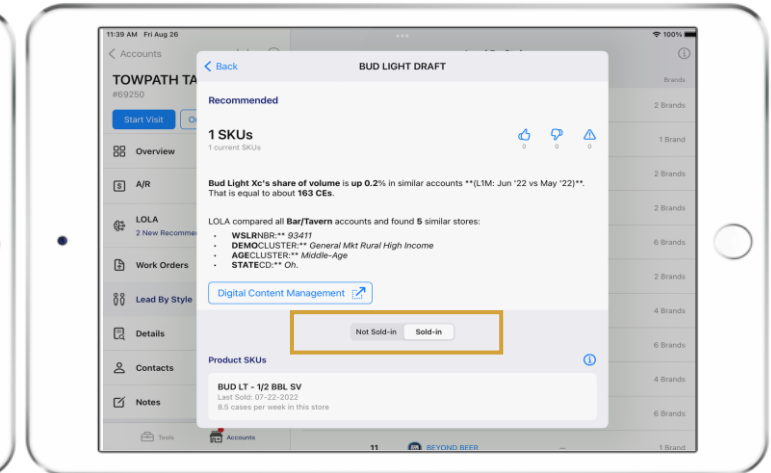
Detailed View



LOLA Recommendation



Product SKU Sold-in status



M360 – LOLA



What is LOLA?

Account-level brand distribution recommendations based on machine learning, which considers local factors such as market demographics, STRs, rate-of-sale, & more.

Why is it useful?

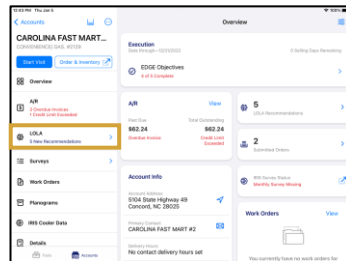
- Simple **distribution recos** that have been proven to deliver STR & revenue performance lift
- Selling stories to provide reasons to believe
- SKUs sold-in & ROS info from that account
- SKUs not-sold-in & ROS info from relevant wholesaler/channel
- Ability to provide feedback to data model so the recommendations consistently improve
- Competitive advantage unique to AB

How do I access it?

1 M360 home screen

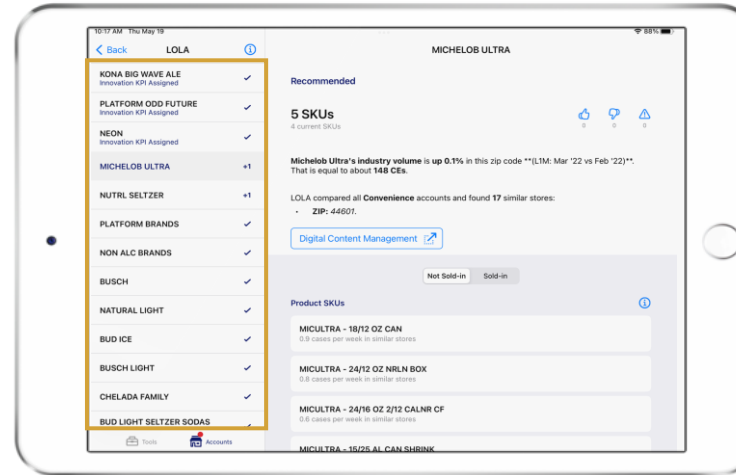
2 Account Screen

3 LOLA tab
Anheuser-Busch

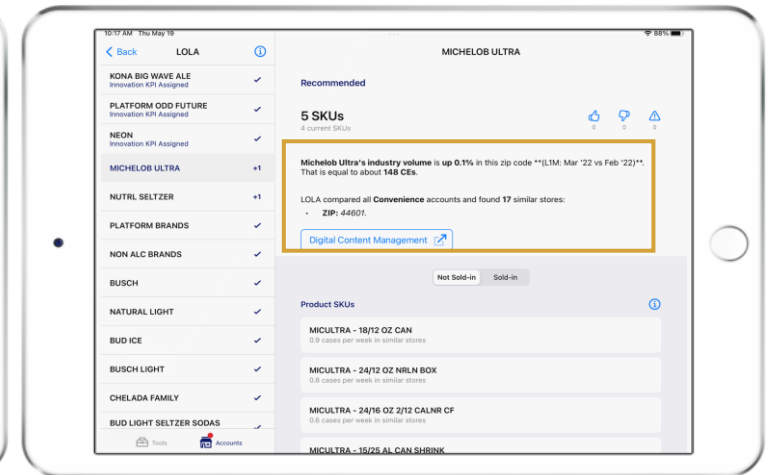


What does it look like?

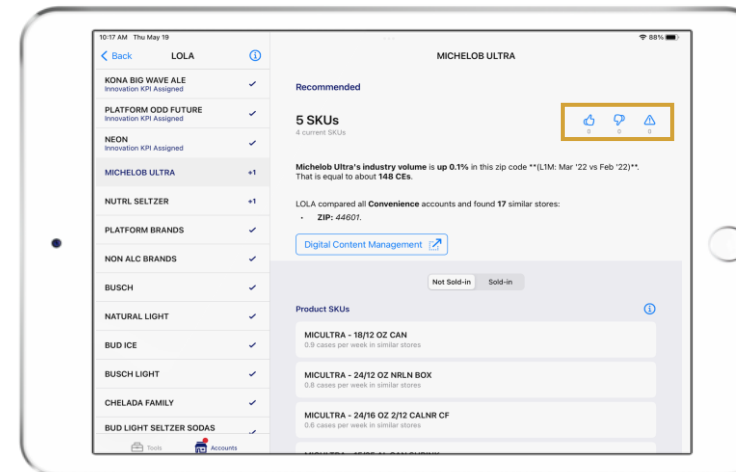
Recos to either increase or maintain current POD count



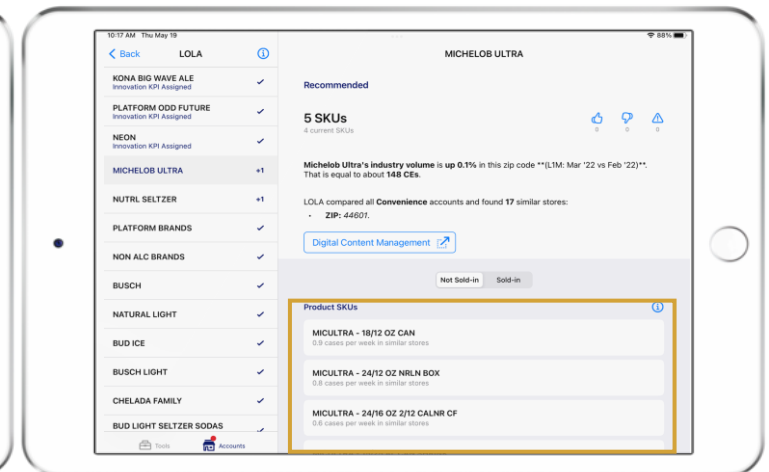
Custom selling stories to explain reco context



Provide feedback on recommendation



SKUs sold in/not sold in with Rate of Sale info



M360 – Bigtincan

What is Bigtincan?

One stop shop platform that provides direct access to all AB content* in an easy-to-use fully integrated platform.

**Local content also available per wholesaler management preference*

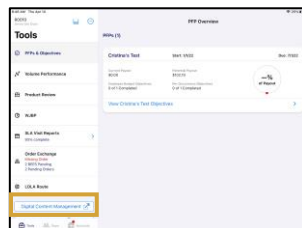
Why is it useful?

- One place for both AB and local content
- Compatible Offline/Online
- Bookmark important content
- Annotate national material to incorporate local information
- Share content with retailers/colleagues
- Combine relevant material into one document using Quick Stack
- Find all your custom content within My Channel

How do I access it?

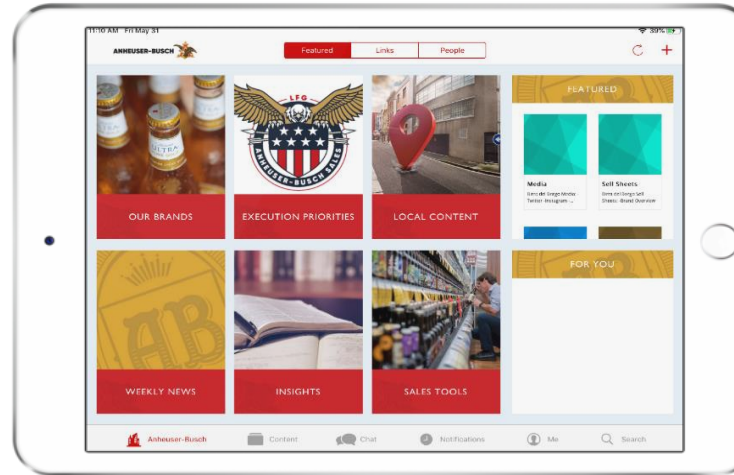
1 M360 home screen

2 Digital Content Mgt
(Also accessible from Account Screen)

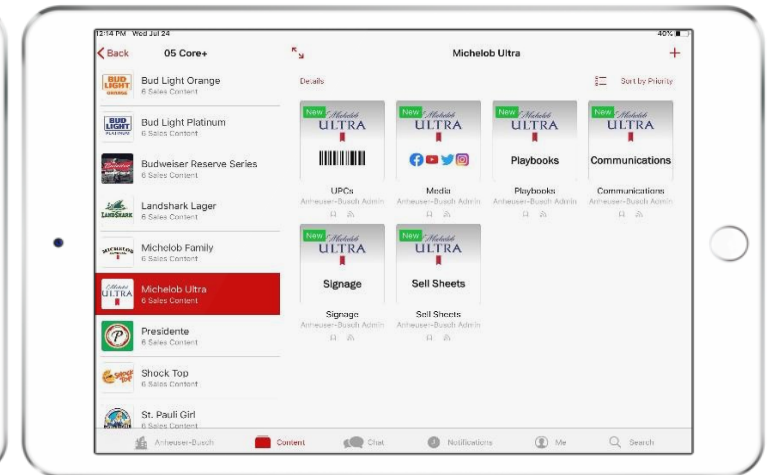


What does it look like?

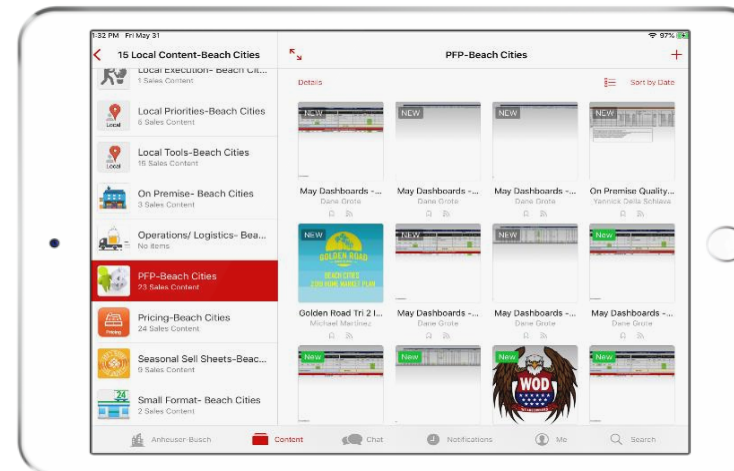
Home Screen – Brand Content, Local Content, etc.



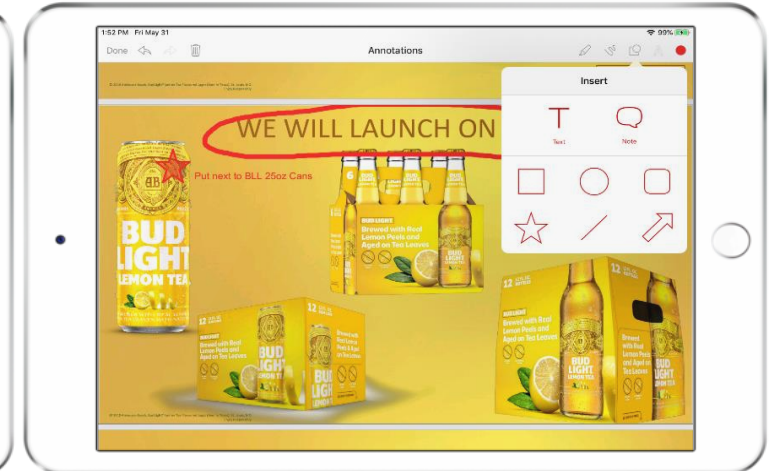
National Content – Brand Sell-sheets, UPCs etc.



Local Content – Share & Organize Local Priorities



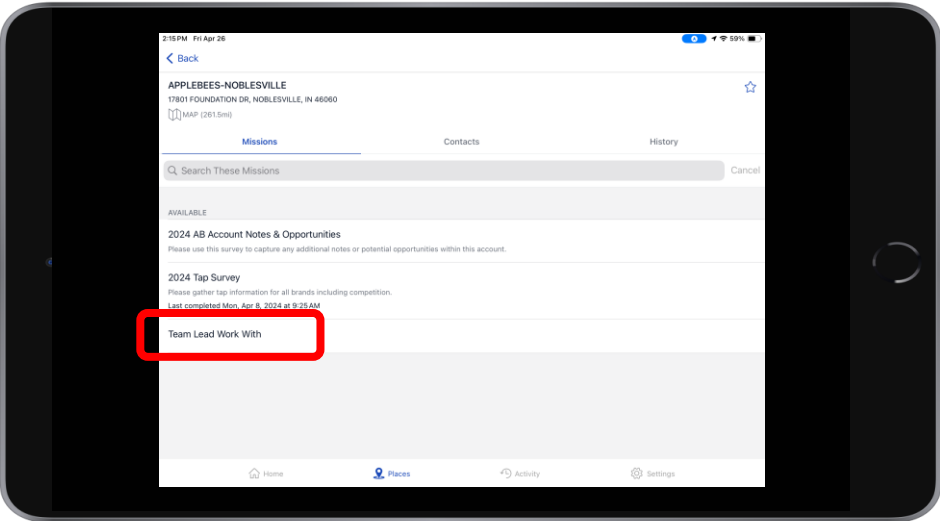
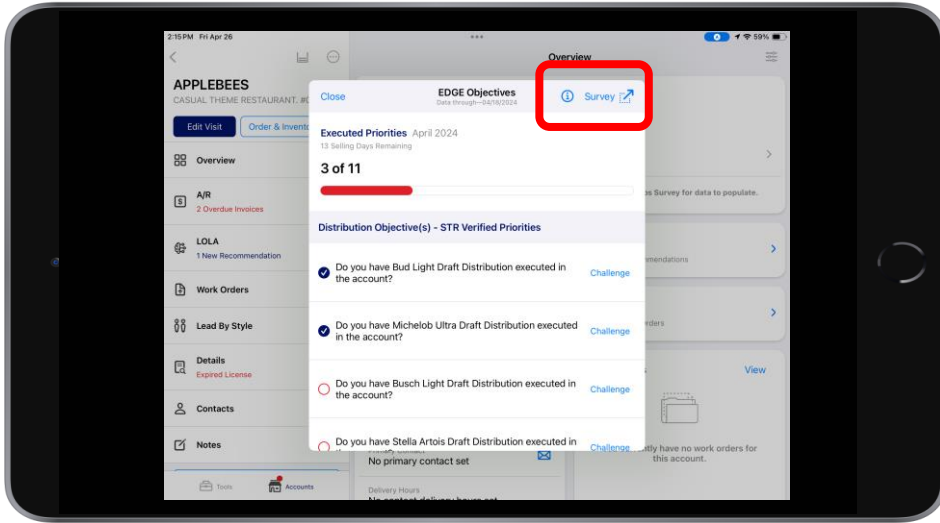
Content – Customize, Save, Share, Give Feedback.



Team Lead Work With Survey



Team Lead Work With Survey



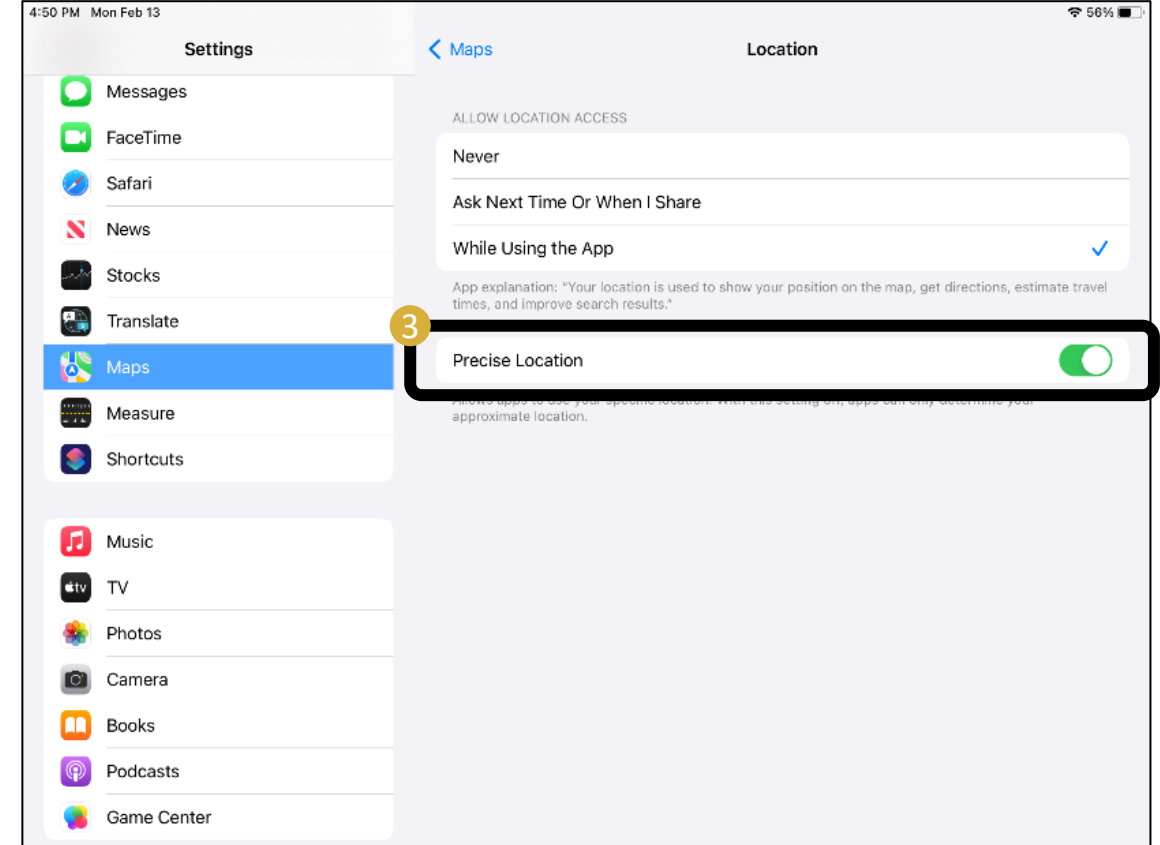
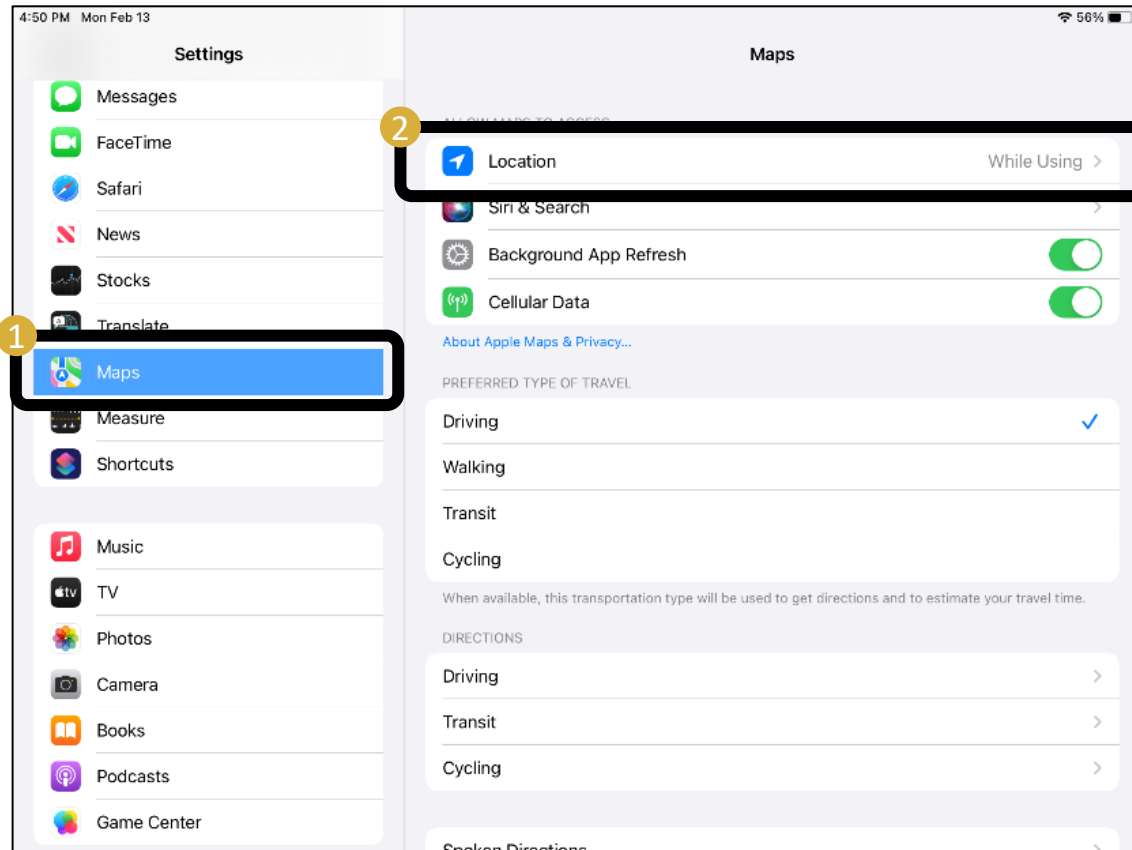
You can get to the Team Lead Work With survey in GSC from the Account tab:

- 1. Click on Account from the Accounts tab**
- 2. Click on Overview once you are in the Account you select**
- 3. Click on Execution under Overview**
- 4. Click on Survey in the top right corner of the EDGE Objectives screen**
- 5. You will be brought into GSC**
- 6. You will see a list of surveys for that account**
- 7. Click on the Team Lead Work With survey in GSC**

Best Practices & Tips for Issues



Best Practice #1: Open Settings on iPad & enable Precise Location on the Maps tab in Settings. This helps address receiving “Account out of range” when in front of the location of the account being serviced.

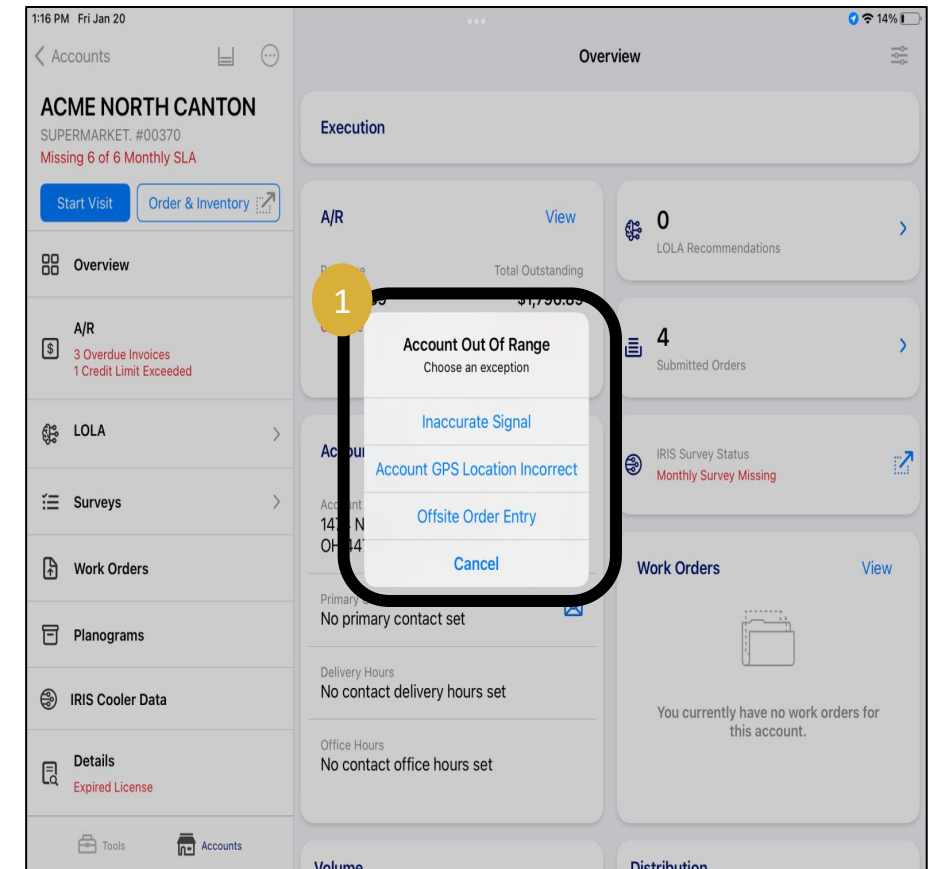


*****MOST IMPORTANT: Open Maps on the iPad to manually refresh the most up to date location you are at in market**

Best Practice #2: Follow the steps below if you find yourself receiving “Account Out of Range” prompt checking into the account in M360:

✓ **When receiving the “Account Out of Range” pop up with 3 exception reasons but you are outside the account**

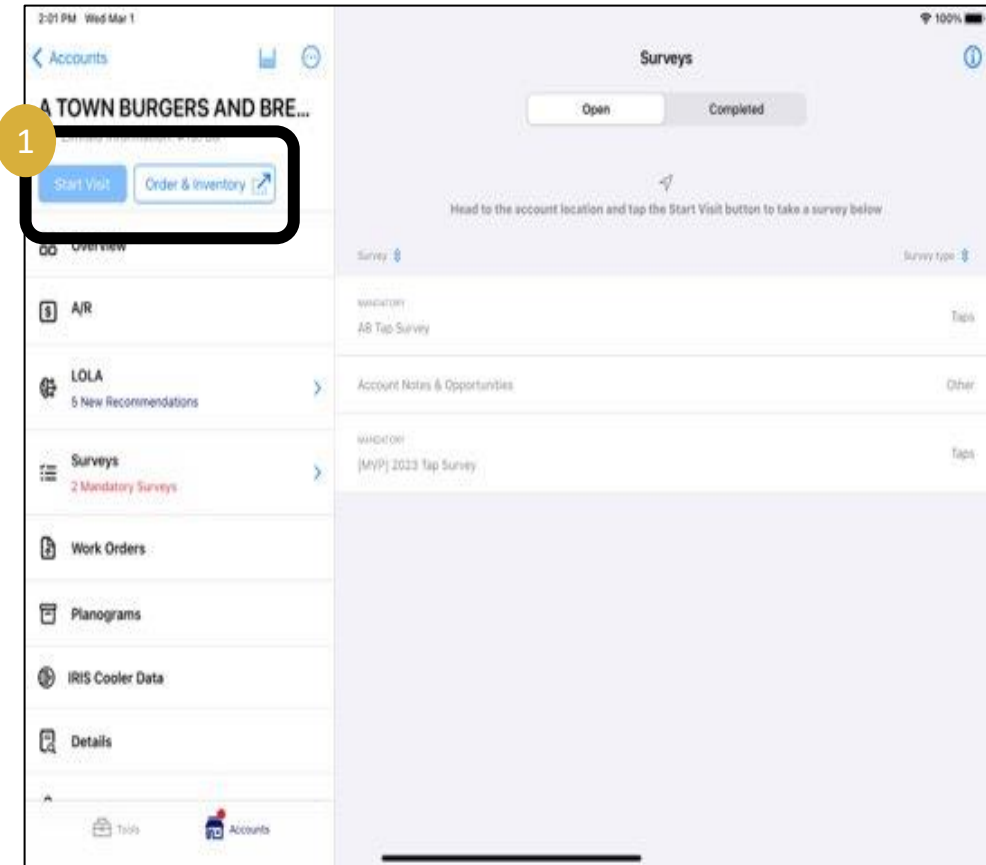
- 1) Take a screenshot of the error message, compile the account name & number, and fill in a ticket at [Salestechsupport.com](https://salestechsupport.com) to resolve the issue.
 - The typical error is caused by the address/GPS coordinates being incorrect.
 - This is a quick fix by our Support team and should be resolved within the day of creating the ticket but will take 24-48 hours to process



Best Practice #3: Follow the steps below if you find yourself in a situation where you cannot check into the account in M360:

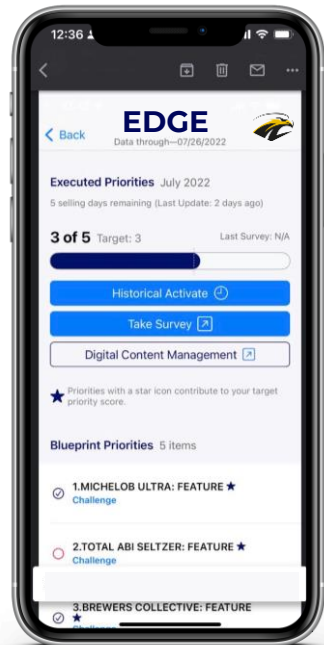
✓ **When you can't begin a visit because the account says Limited Account Information and the "Start Visit" option is greyed out**

- 1) Take a screenshot of the error message, compile the account name & number, and fill in a ticket at [Salestechsupport.com](https://salestechsupport.com) to resolve the issue.
 - The typical error is caused by a mismatch of the VIPID's between the RAS & Master Account List.
 - This is a fix by our Support team and should be resolved within 48 hours of processing the ticket and update.



EDGE Completion Process

**View EDGE
Account Objectives in M360**



**Complete Assigned
EDGE Surveys**



Display

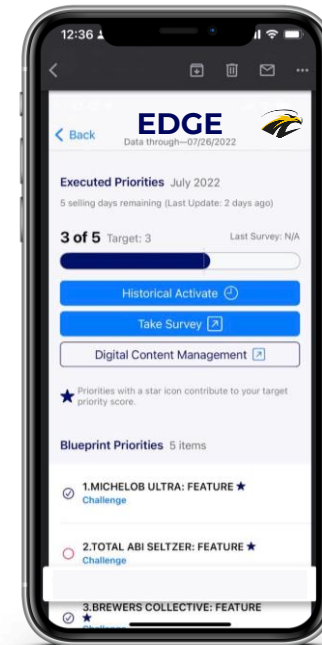


Merch/POCM



Taps

**Review Execution
in M360 & AB Analytics**



*****ATTENTION: Do not always challenge Objectives in M360.
Please have your Sales team complete EDGE surveys for credit 1st**

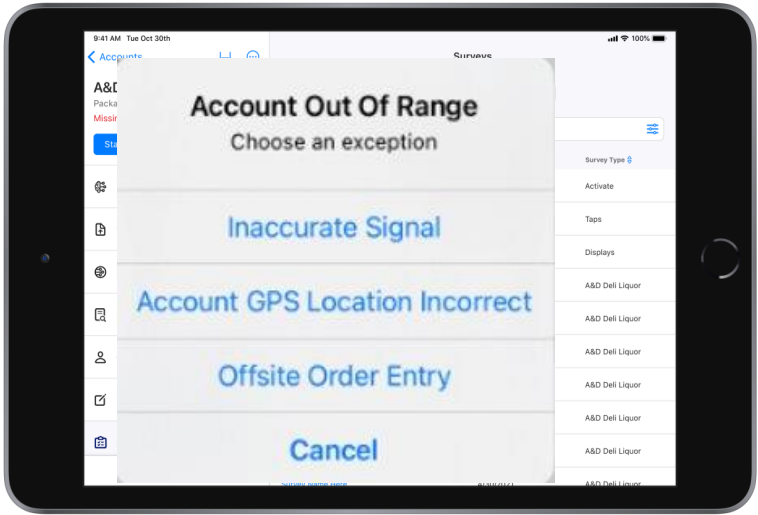
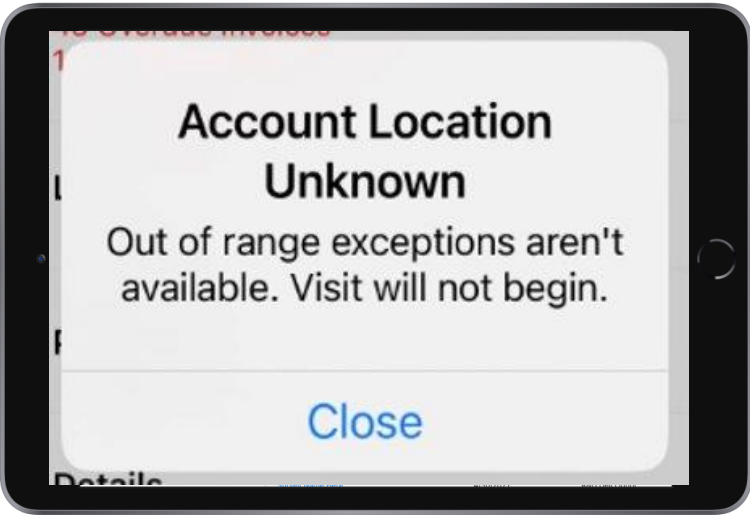
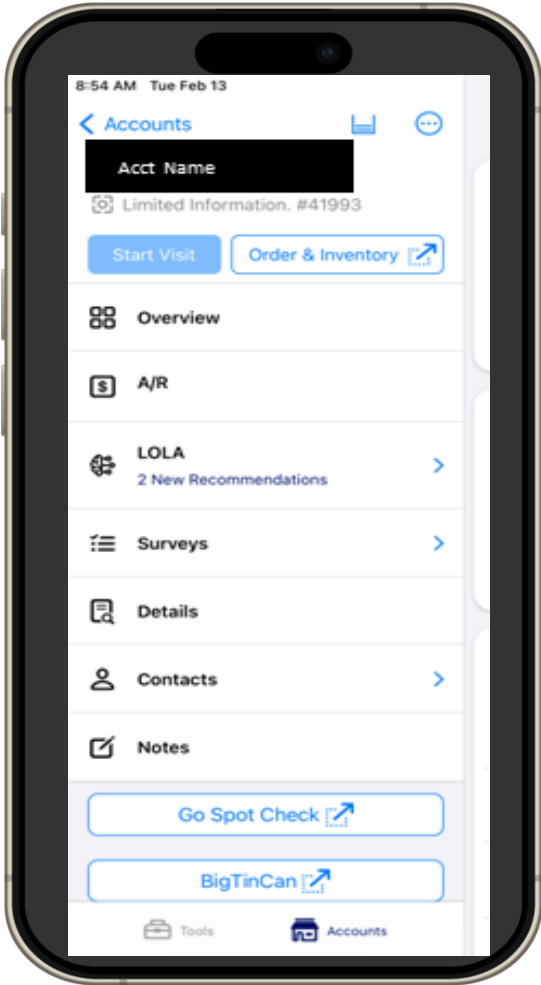
Top 3 Support Tickets



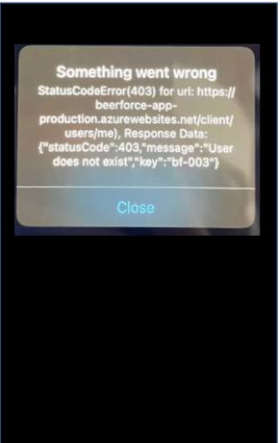
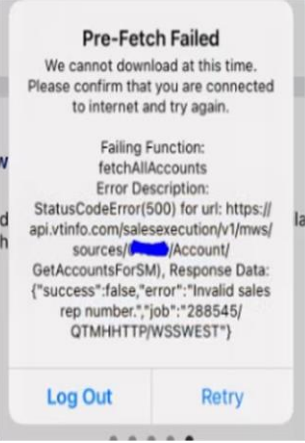
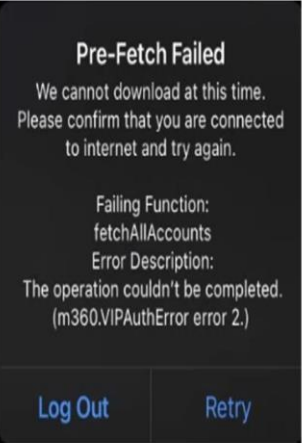
Top 3 Support Tickets

GPS

Limited Information



Pre-fetch Errors



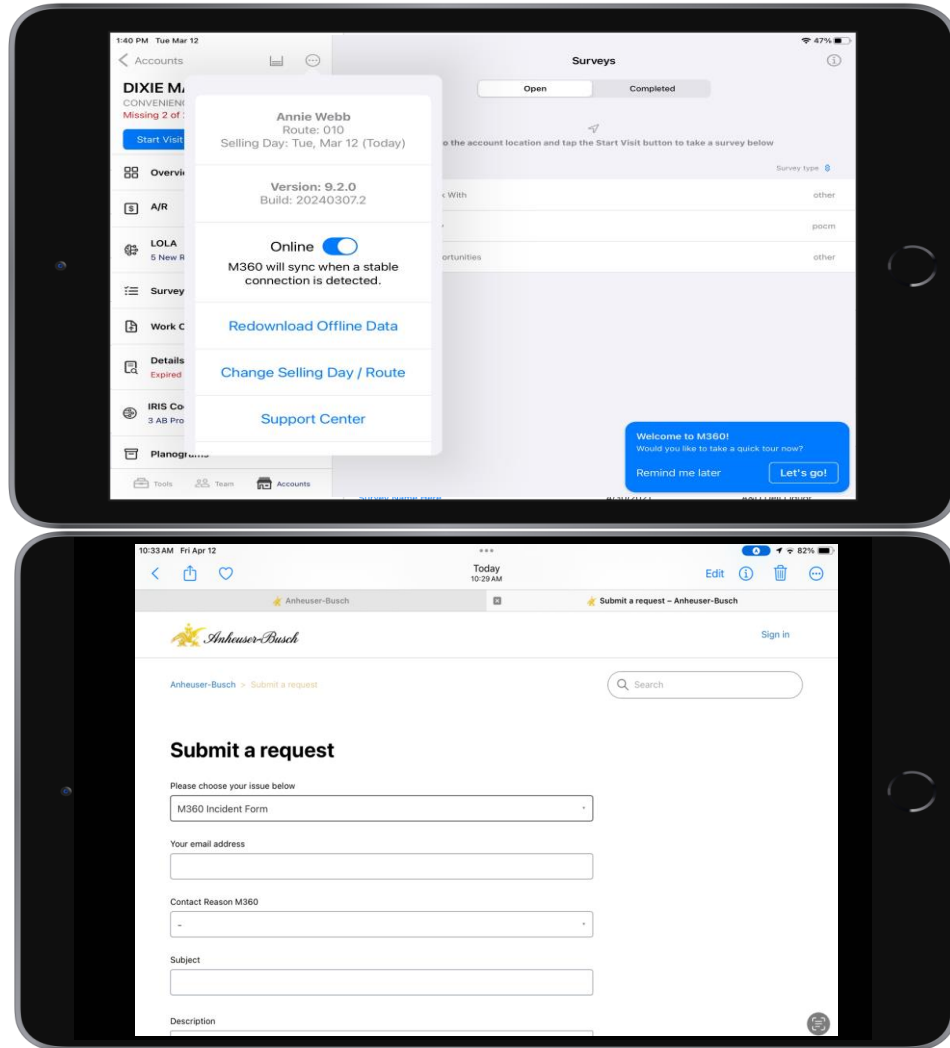
O-Auth Token Expired (401 Error) - Encompass Users

VIP Auth Error - VIP Users

FetchAllAccounts Failing Function (500 Error)

User Does Not Exist (403)

Support Center is found under the App Menu Icon



Use the App Menu icon in the top (circle with 3 dots) to:

- 1. View your route information, version and build numbers**
- 2. Manually place the app into offline mode if you are in an area of bad connectivity**
- 3. Start a redownload of offline data via the “Redownload Offline data” button**
- 4. Change Selling Day / Route (which also will download again)**
- 5. Report any issues or suggestions you have via the “Support Center” button**

Key M360 Takeaways

01

Ensure you start and end visit for every account visit

02

Become a M360 Power User by interacting with key Power Features at least 5 distinct days in the last 30 days

03

Utilize salestechsupport.com or Support Center within M360 for your M360 support/feedback

Thank you.
Cheers!



Anheuser-Busch