



Initial Training Schedule (4 Recommended)

First Training Appointment – Introduction to Balance to Buy (Inventory Maintenance)

- How we collect data
- Balance to Buy landing page & main menu options
- Report generation – Vendor Version Sum-Det Rpts
 - Retailers
 - Styles
- Dashboard tour
- Data/report review
 - Dynamic headers
 - Turn calculation options
- Detail column functionality
 - Stores
- Export options
- Image functionality*
- Saved Reports
- Learning Center

Second Training Appointment – Retailer Engagement (IF APPLICABLE)**

- Custom vendor page
- Retailer Engagement conversation
 - Function
 - Outlining Benefits
 - Addressing Concerns
- Permission process
- Toolkit
 - Vendor page link
 - Vendor permission link
 - Email template
 - Vendor Presentation
 - BIG Vendor Matrix
 - Permission postcard with QR Code
 - Leave-behind literature with QR Code

Third Training Appointment – Strategic Balance to Buy Usage (Business Review)

- User questions
- Period Trend reports
 - Year-over-year
 - Year-to-date

- Detail column usage
 - Price points
 - Sub-category (if applicable*)
 - Ownership
 - Transaction Type
 - Parent model (if applicable*)
- Show Rows with 0 Sales option
- Age Column options

Fourth Training Appointment – User-Guided Review

- User questions
- Additional Saved Reports

*Applicable if vendor item catalog is being pursued

**Applicable if user role is retailer-facing

If you have any questions or concerns, please don't hesitate to reach out to The BIG Network Team:

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