USER MANUAL FOR MANUFACTURERS

1199 Euclid Avenue ● Atlanta, GA 30307 ● TEL: 404-214-9474 ● 888-254-0033
specpath@mafsi.org ● www.specpath.org ● @MAFSIAssoc

TABLE OF CONTENTS

specpath®
POWERED BY MAFSI

SPECPATH® GLOSSARY OF TERMS

11 40 00 Specification: 11 40 00 Specifications (commonly referred to as 11-400, or 11-4000 specs) are the written requirements for the foodservice facility portion for a proposed construction project, like a hospital, school or university. For architectural projects, the 11 40 00 specifications are part of the Contract Documents included with the bidding and construction requirements and the drawings. The 11 40 00 specification, identifies the particular equipment and items related to the foodservice aspects of the operation that will be needed to carry out the project. The 11 40 00 specification typically includes a comprehensive item-by-item listing of the equipment needed, the manufacturer or brand of the equipment, the quantity, and the model number. These 11 40 00 specifications are then forwarded to members as PDF's, and those PDF's are uploaded into SpecPath®.

NOTE: Only Equipment is included in a 11 40 00 specification, NOT Smallwares/Supplies, Tabletop and Furniture.

- **Single-Source (or Proprietary) 11 40 00 Specification:** A specification that is written for a project that names one manufacturer by brand name to be included in foodservice facility design as designated by owner or foodservice design consultant.
- **"Pick-Two" or "Pick-Three" (Alternate or Equal) 11 40 00 Specification:** In North America, federal, state, and most local governments, have established competitive bid laws for public projects in an effort to maintain an equitable business climate. The intent is to eliminate price fixing/gouging by equalizing the competition at the level of the contractor (the firm directly contracted by the government or client) by requiring bids from a minimum of three or more manufacturers. Correspondingly, most business and not-for-profit organizations have mandated similar competitive bid procedures. Often the 11 40 00 specification will include the Prime, Equal and Alternate manufacturer brand names.

Click on link for an example of an 11 40 00 Specification Single Source Spec.

Click on link for an example of an 11 40 00 Specification Pick 3 Spec.

Alternate: A term in the 11 40 00 specification which specifies when two or more manufacturers produce comparable quality and function products, with little or no utility, installation or performance modifications required. Often included and/or required in public bids.

Commission: Payment to a manufacturers' representatives for selling equipment, supplies, table top, furniture or services to any authorized outlet of that product. In the case of 11 40 00 specifications, commission is usually divided into three portions: specification, origination, and destination.

Commission Split: The proportional division of total commission to each deserving manufacturers' sales representative when the specification, origination and/or demonstration falls in more than one MAFSI region. The dollar value of these "splits" are individually determined by each manufacturer.

Demonstration: The specific act of a trained professional showing the operator and/owner how to use a particular piece of foodservice equipment. This demonstration should include operations, application as well as cleaning and maintenance. All actions within the demonstration should be referenced in the operator manual as prepared by the manufacturer of said piece of equipment.

Destination: Destination is where the project is located or being constructed.

Destination Credit: Destination credit (commission) is usually awarded to the manufacturers' agent whose territory the piece of equipment is actually being installed in. This "destination credit" is where the project is located and will typically compensate a manufactures' agent for the demonstration or any other installation related questions that may occur in the normal course of business. Destination credit is also recognition of a reps “end user” work and follow up in a territory.

Equal: A term which specifies that other manufacturers listed in 11 40 00 conform to all specific features of the prime manufacturer in the 11 40 00 specification. Often included and/or required in public bids.

Origination: Origination refers to the location of the dealer on the project.

Origination Credit: The portion of commission awarded to the manufacturers' agent whose territory the actual order originated from or where the dealer is located. Due to dealers and chains having multiple offices, sales credit doesn't necessarily go to the "rep" territory where the purchase order is simply generated. Sales credit is usually awarded to the territory responsible for "handling" the order process.

Primary (or Prime): A term which specifies that only one manufacturer is listed as the only manufacturer of a certain piece of equipment in a single-source (or proprietary) 11 40 00 specification or is designated by the term "Prime" as the number one choice in a Pick-Two or Pick Three 11 40 00 Specification.

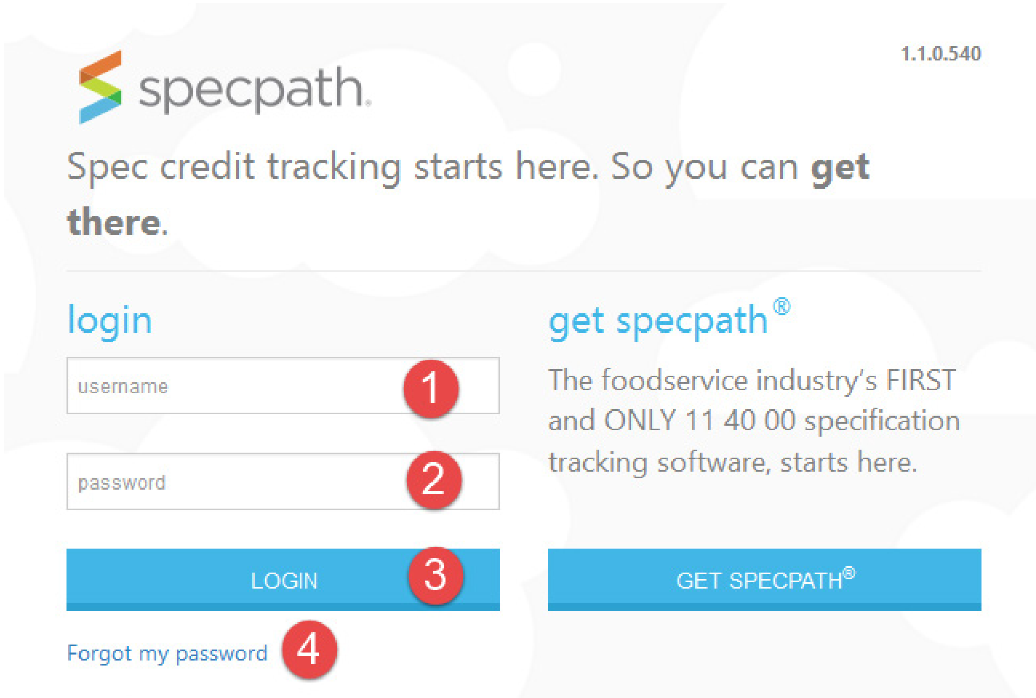
Specification: Specification is generally the location where the consultant or specifier is located.

Specification Credit: The portion of commission awarded to the manufacturers' agent who had specific responsibility for the consultant, dealer, chain or operator choosing a particular brand and/or model of equipment. This credit is generally given to the rep based in the same geographic area where the consultant’s office is located.

Logging Into SpecPath®

Please go to www.specpath.org

You will want to bookmark this page – naming it SpecPath in your browser so you may find it easily each day.



Type in your user name and password.

1. **USERNAME:** Your email address registered with MAFSI.
2. **PASSWORD:** The password provided to you in the new user email you received from MAFSI.
3. You must click the LOGIN button to complete the login task. Pushing the ENTER/RETURN key will not activate login.

   The first time you log into your account, the system will redirect you to the End User License Agreement, and will instruct you to choose a new password and type it in twice for verification. The new password will be the password you will use henceforth to log in to the SpecPath® system.

Please safeguard this password and keep it secure.

4. **FORGOT MY PASSWORD**

Click on the link to access the password retrieval system and type in a new password to use in the SpecPath® system. Please safeguard this password and keep it secure.

Navigation Ribbon

You can click on any link and you will be taken to the SpecPath® webpage that contains the information pertinent to the link title.

1. **My Dashboard:** A quick overview of your top three reps, consultants, dealers and market segments.

2. **My Projects:** On this page you can see an overview of your projects as well as navigate to the individual project pages.

3. **My Rep Firms:** The page lists the corresponding reps firms for hour projects by items, as well as project.

4. **My Consultants:** This page give you a list of consultants that specify your project, and the number of items and projects for your brand.

5. **My Dealers:** This page gives you a list of dealers bidding on projects that include your brand, and the number of origination items and projects for your brand.

6. **My Market Segments:** On this page you will find a list of the market segments, and the number of items, and projects for your brand.

7. **My Mini Specs:** On this page, you will find the CSV export files for your items on each project.

8. **Rep Finder:** This page enables you to find the correct rep for a project, by simply inputting a region, city, or zip code.

9. **About SpecPath:** This page explains the history and need for SpecPath.

10. **Contact Us:** This page is self-explanatory. We would love to hear your thoughts!

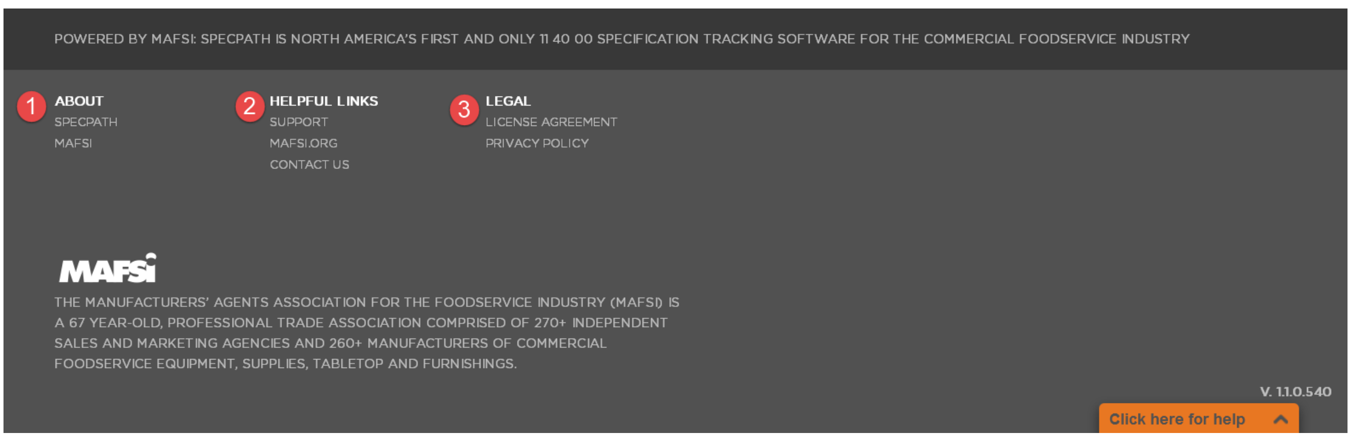
Bottom Banner

The bottom banner contains useful links to information about SpecPath®.

1. **ABOUT**
   - SPECPATH – An overview of the SpecPath system and why it is needed
   - MAFSI – An overview of MAFSI is provided

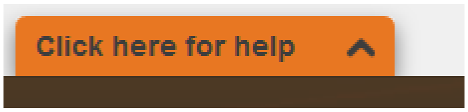
2. **HELPFUL LINKS**
   - SUPPORT – Links to the SpecPath Help Desk
   - MAFSI.ORG – Links to the MAFSI website
   - CONTACT US – Links to a page of relevant contact information

3. **LEGAL**
   - LEGAL DISCLAIMER– Links to our Legal Disclaimer regarding data in SpecPath.
   - PRIVACY POLICY – Links to a copy of MAFSI's SpecPath Privacy Policy



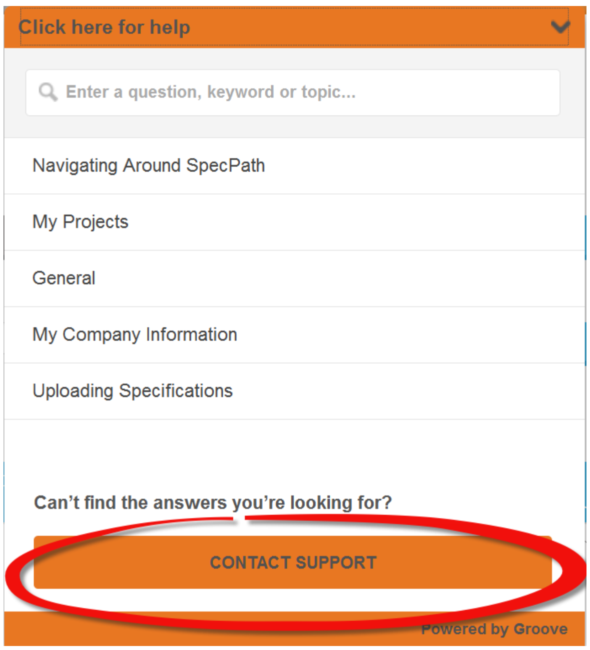
Help Desk and Contract Administrator

This pop up appears on every page in SpecPath® in the bottom right corner of the page. You may click on it to access the help desk for assistance. You can ask a question, report a problem, or suggest an improvement. A pop up will then appear for you to complete and a ticket will be generated in our help desk for an administrator to assist you.



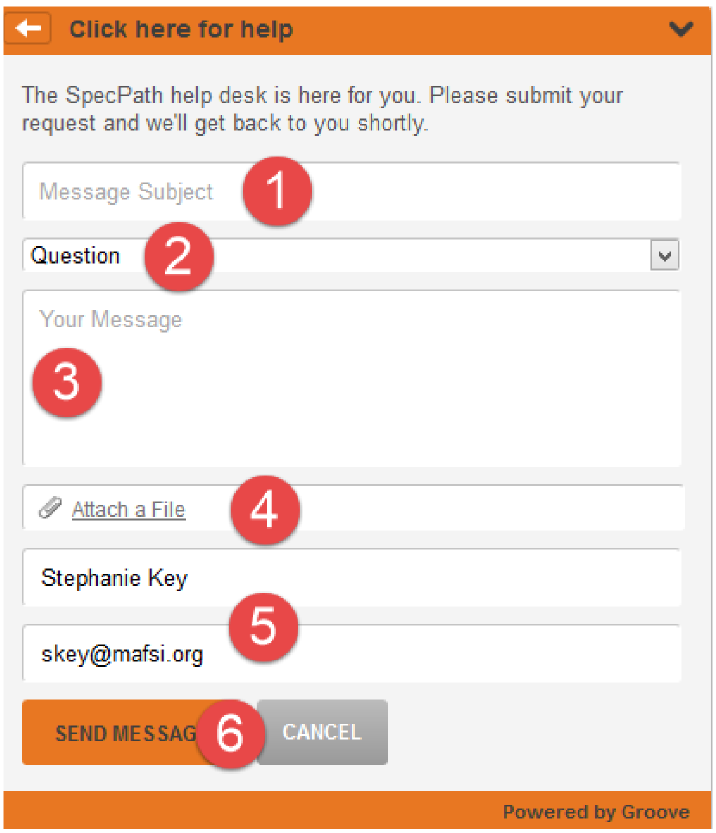
The first screen you see will have the Help Articles.

Please click on the Contact Support button to send us a message.

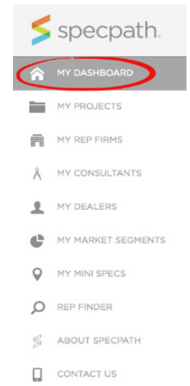


In the boxes, please complete the following:

1. Message Subject – Type a short explanation of your need
2. Choose a category from the drop down box to direct your ticket to the proper response team. The choices are a) Question b) Suggestion c) Problem.
3. Message Box - Type the reason for your request for assistance in the message box.
4. Attach a file or screen shot to help explain your issue if you choose.
5. Fill in your Name and E-mail.
6. Click send and help will be on its way!



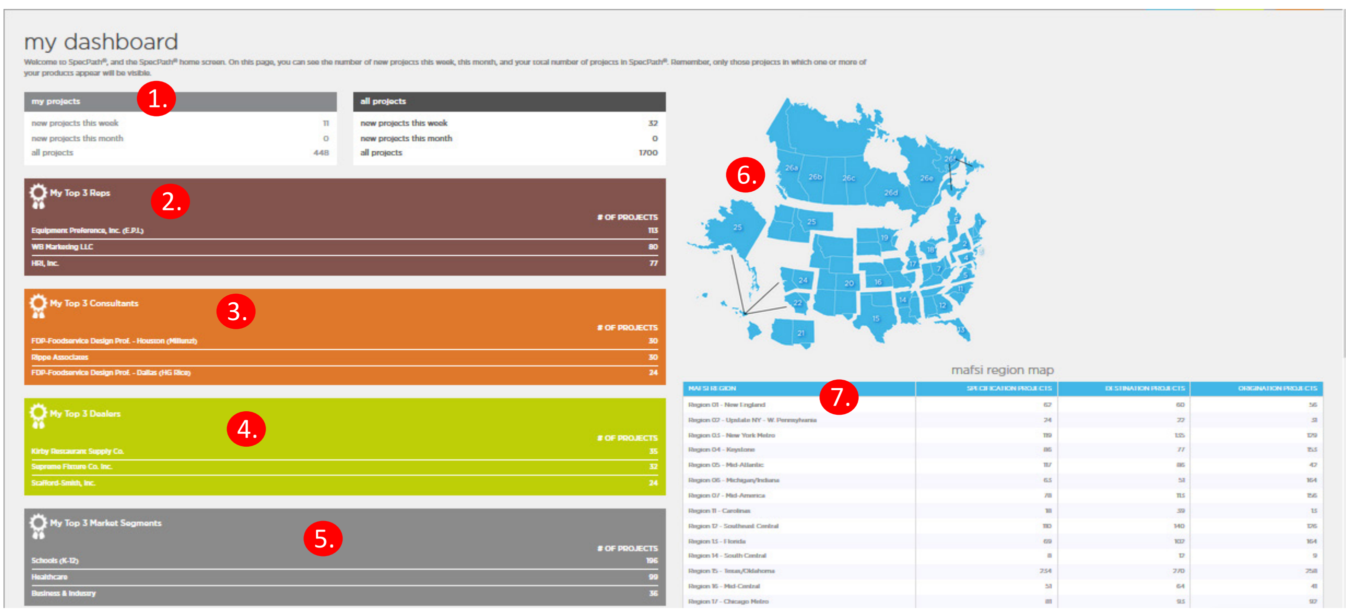
My Dashboard



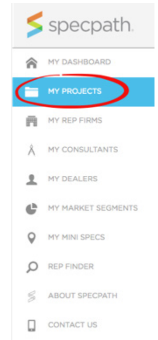
This is your homepage and shows a summary of information from the My Projects, My Rep Firms, My Consultants, My Dealers, and My Market Segments webpages.

In the each of the boxes you will find the following:

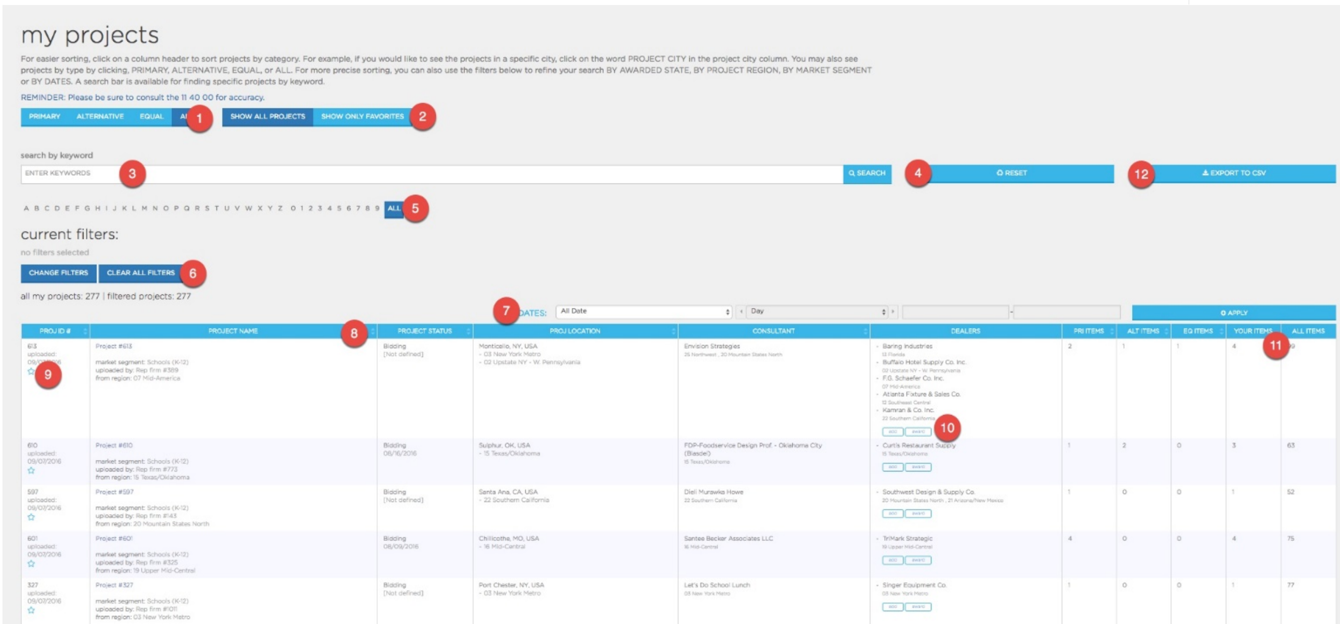
1. Metrics showing information on YOUR PROJECTS vs. ALL PROJECTS in the SYSTEM.
2. Your TOP 3 REP FIRMS by # of PROJECTS
3. Your TOP 3 CONSULTANTS by # of PROJECTS
4. Your TOP 3 DEALERS by # of PROJECTS
5. Your TOP 3 MARKET SEGMENTS by # of PROJECTS
6. A map of all the regions MAFSI serves
7. A table VERBIAGE



My Projects



This page shows all your projects in SpecPath®, along with a system-generated project ID, project name, project location – city, state and country, MAFSI Region, consultant associated with the project, market segment, number of items in the spec for which your brand is associated, the project's status, bidding and awarded dates, and the date of the original upload to SpecPath®.



You may search for a specific project or group of projects in various ways:

1. **By the Project Button Ribbon** – To use this function, click on any of the four buttons and it will darken and the results table will return information based on the buttons descriptions:
    a. Primary - will show only those projects in which your brand is the primary specification.
    b. Alternative - will show only those projects in which your brand is the alternative specification.
    c. Equal – will show only those projects in which your brand is the equal specification.
    d. All My Projects – will show all projects in which you are specified, regardless of spec type.

2. To see only your favorite projects (see item 9), click "SHOW ONLY FAVORITES."

3. **Search for projects by keyword** – to use this function, simply type in a keyword that is contained in your table click "Search" and the table will return the results containing your keyword.

4. Click to **reset** all sorting options.

5. **Sort projects by alpha numeric character** - to use this function, simply click on the Letter or Number of your choice and the table will populate with all Projects starting with that letter or number.

6. Click **CHANGE FILTERS** to filter your projects (see below for instructions on using filters.) Click **CLEAR ALL FILTERS** to see all projects.

7. To sort by upload date, estimated bid date, or awarded date, choose an item from the drop down menu, input your dates accordingly, and click APPLY.

8. To sort by a column header, (PROJECT NAME, LOCATION, CONSULTANT, etc.) simply click the arrows at the top of the column.

9. To favorite an item, simply click the star next to the project. When it is a solid blue, it has been favorited. To remove, simply click again.

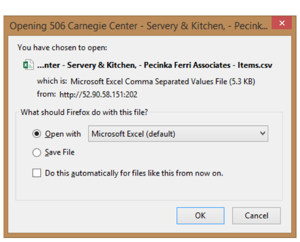
10. This is a count of your items in the spec (prime, alt, equal) as compared to the total count of items in the spec.

11. You will notice under the DEALER column, there is a complete list of bidding dealers for each project. To add a dealer, simply click ADD. (see below instructions for adding a dealer.) If you're certain a dealer has been awarded the project, click AWARD. A confirmation screen will appear, and you will need to press AWARD again. To cancel, click CANCEL.

12. **For additional sorting,** - to work with your data in an outside software tool (Excel, Word, etc.) or print the table information, you can export the table that is displayed based on your search (or no search at all), click on the Export to CSV button, and all the information in your results table will be exported to a file that you can save.

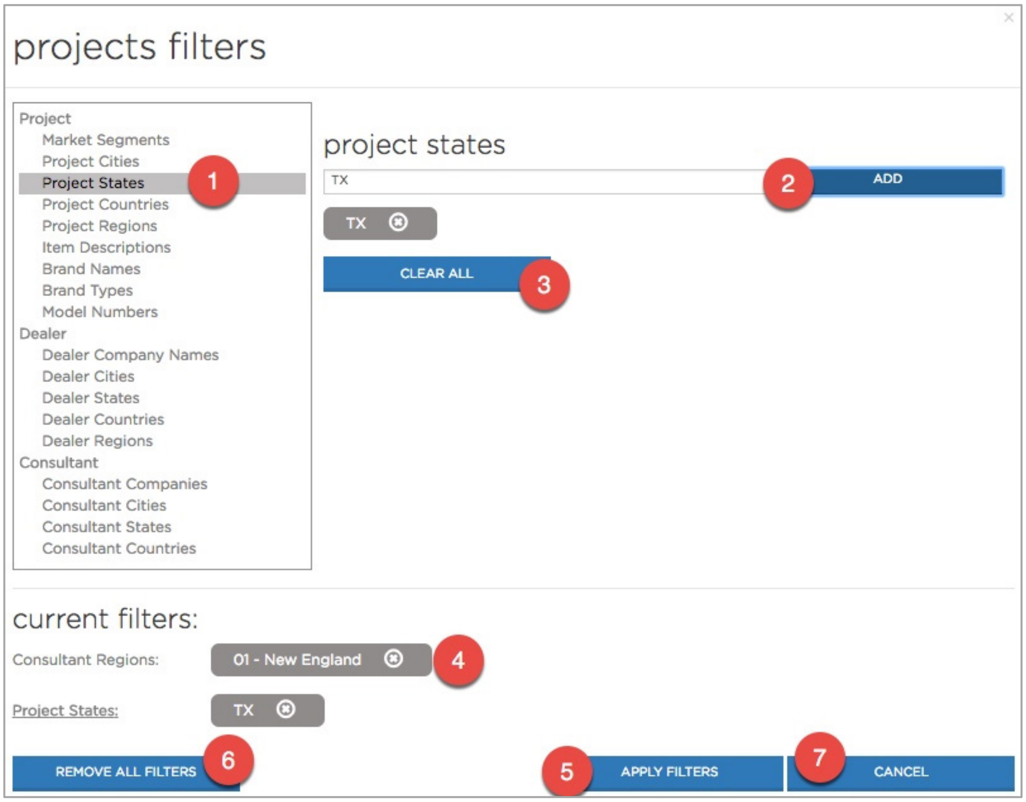
    To export your data, you can either open the file with Microsoft Excel or another program or you can save the file to your computer or laptop. The file is saved as a comma separated file (CSV) through the download function in your browser.

13. **Navigating the Projects Table** - To navigate the results table, you can use the scroll bar on the right side of the table or the paginator located at the bottom of the webpage. You may also sort the table using the up and down arrows located on many of the columns. Clicking on the project name in the Projects table will hyperlink you to the My Project details page where you can see more in depth information about that specific project.
    TIP: Be sure to click on the Project Links to open up the Project Details Page.



Using Filters

Finding exactly what you're looking for makes life a lot easier. Using filters does just that. Apply a filter to search for specific dealers, cities, consultants and a whole lot more.



1. Choose your desired filter. Please note, you may choose as many as you would like.

2. Input your desired field, and click ADD. To remove, simply click the X in the filter label.

3. To **clear** all desired filters, click CLEAR ALL.

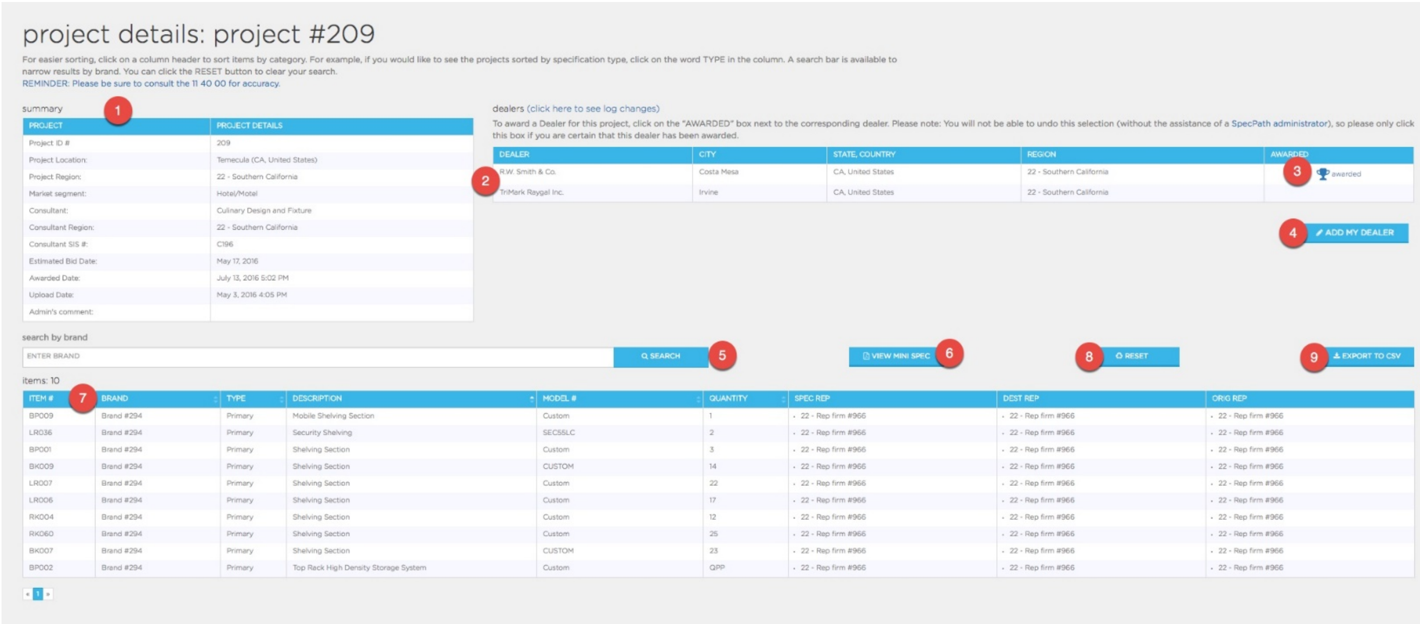
4. This is a list of your **current desired filters**. To remove, click the X in the filter label.

5. To **view** your projects with the desired filters, click APPLY FILTERS.

6. To **remove** all filter selections and start over, click REMOVE ALL FILTERS.

7. To **leave** the filter selection menu, click CANCEL.

My Projects Detail



1. A **summary** table of relevant project information.

2. **Dealers** that are actively bidding, or have been awarded the project.

3. If they project has been awarded, you will see this **trophy icon**.

4. **If they project has not been awarded,** and you would like to add a bidding dealer to an existing project, click ADD MY DEALER.

5. **Search** for your brands in the project by entering a brand name.

6. **To see a mini-spec, or automated “take-off”** of the project click “VIEW MINI SPEC.” This will give you an itemized list of the items in the project you represent.

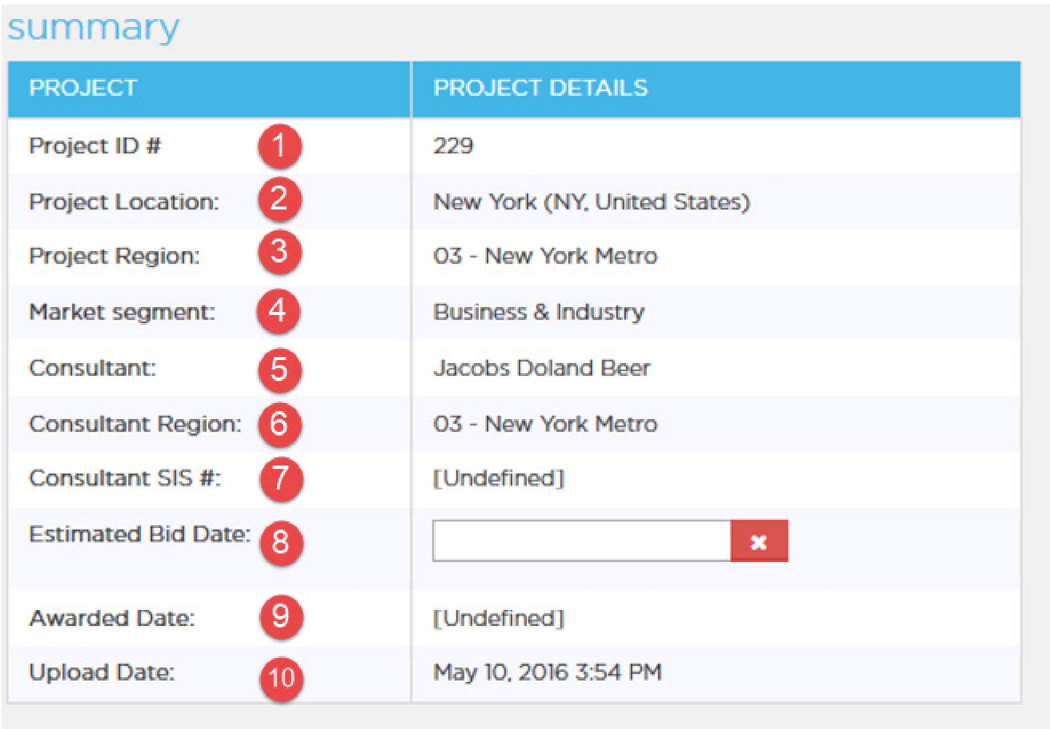
7. You may sort by any **column header** with an up and down arrow. For instance, to sort by MODEL #, click the up and down arrows in the MODEL # column.

8. To **reset** any sorting options, click RESET.

9. **For additional sorting**, simply click export to CSV on the right-hand side, and a comma separated values file, or CSV, will download into your browser. Simply open the file in a data management program like Excel, and you can manipulate the data however you like.

Project Summary Section

The Summary section includes information about the project including the Project ID, Project Location, Project Region, Market Segment, Consultant, Consultant Region, Consultant SIS#, Estimated Bid Date, Awarded Date, and Upload Date.



summary

PROJECT	PROJECT DETAILS
Project ID # 1	229
Project Location: 2	New York (NY, United States)
Project Region: 3	03 - New York Metro
Market segment: 4	Business & Industry
Consultant: 5	Jacobs Doland Beer
Consultant Region: 6	03 - New York Metro
Consultant SIS #: 7	[Undefined]
Estimated Bid Date: 8	
Awarded Date: 9	[Undefined]
Upload Date: 10	May 10, 2016 3:54 PM

1. **Project ID** – the unique identifier number assigned to the specification by SpecPath®.
2. **Project Location** – the location where the project is located.
3. **Project Region** – the MAFSI region in which the project is located.
4. **Market Segment** – the market segment that best represents this project.
5. **Consultant** – the consultant that wrote the specification. If it is empty, and you know the consultant, please add them to the project.
6. **Consultant Region** – the region where the consultant is located.
7. **Consultant SIS#** - the SIS# for the consultant (if known).
8. **Estimated Bid Date** – the date the project is due for bidding. You may enter a date here if it has not already been input, but you cannot change nor delete the date without the assistance of a SpecPath® administrator. Please use the help desk widget to notify the SpecPath® administrator if you need to modify an estimated bid date.
9. **Awarded Date** – the date the project is awarded. This field will auto populate when a dealer is awarded the project.
10. **Upload Date** – the date the project was uploaded into SpecPath®.

Navigating the Project Dealer Section

The dealer section shows you a list of all dealers that are bidding on one of your projects, including their company name, their location and region, and whether a dealer has been awarded for the project.

1. To award a Dealer for this project, click on the awarded box next to the corresponding dealer. Please note: You will not be able to undo this selection (without the assistance of a SpecPath® administrator), **so please only click this box if you are certain that this dealer has been awarded.**

2. You can also click on the (click here to see log changes) hyperlink which will take you to the log changes page where you can see all changes made to the dealer awards.

dealers (click here to see log changes)

To award a Dealer for this project, click on the "AWARDED" box next to the corresponding dealer. Please note: You will not be able to undo this selection (without the assistance of a SpecPath administrator), so please only click this box if you are certain that this dealer has been awarded.

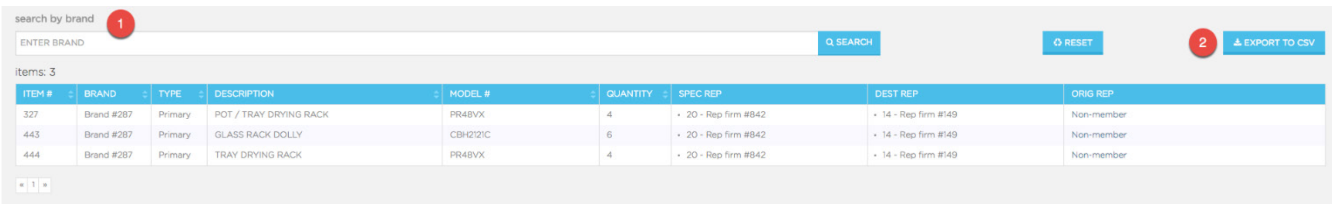
DEALER	CITY	STATE, COUNTRY	REGION	AWARDED
Adams Burch Inc.	Landover	MD, United States	05 - Mid-Atlantic	☐
Atlanta Fixture & Sales Co.	Atlanta	GA, United States	12 - Southeast Central	☐
Kirby Restaurant Supply Co.	Longview	TX, United States	15 - Texas/Oklahoma	☐
Oswalt Restaurant Supply	Oklahoma City	OK, United States	15 - Texas/Oklahoma	☐
Supreme Fixture Co. Inc.	Dallas	TX, United States	15 - Texas/Oklahoma	☐

Navigating the Project Items Section

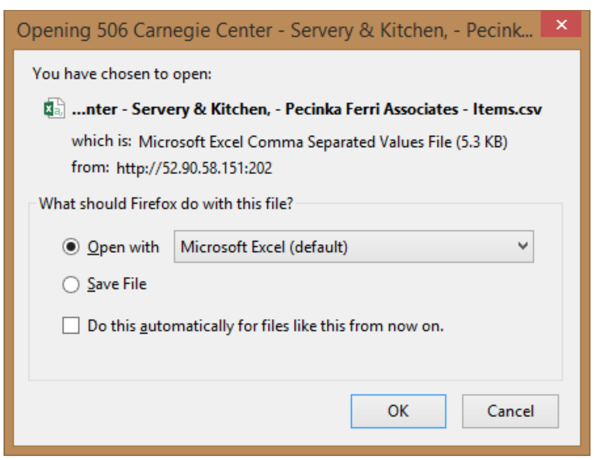
This section shows the detailed item information for your items on the project including Project ID, Brand, Item Type, Description, Model #, Quantity and the Specification, Destination and Originating Rep.

1. You can search the items table by Brand by typing the Brand name in the search box. To cancel the search, click the reset button.

2. If you wish to work with your data in an outside software tool (Excel, Word, etc.) or print the table information, you can export the table that is displayed based on your search (or no search at all) click on the Export to CSV button and all the information in your results table will be exported to a file that you can save.

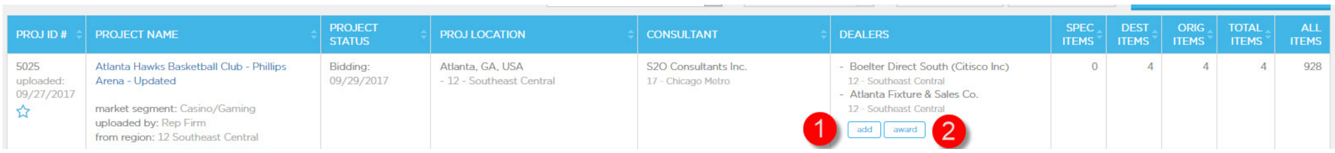


3. To export your data, you can either open the file with Microsoft Excel or another program or you can save the file to your computer or laptop. The file is saved as a comma separated file through the download function in your browser.

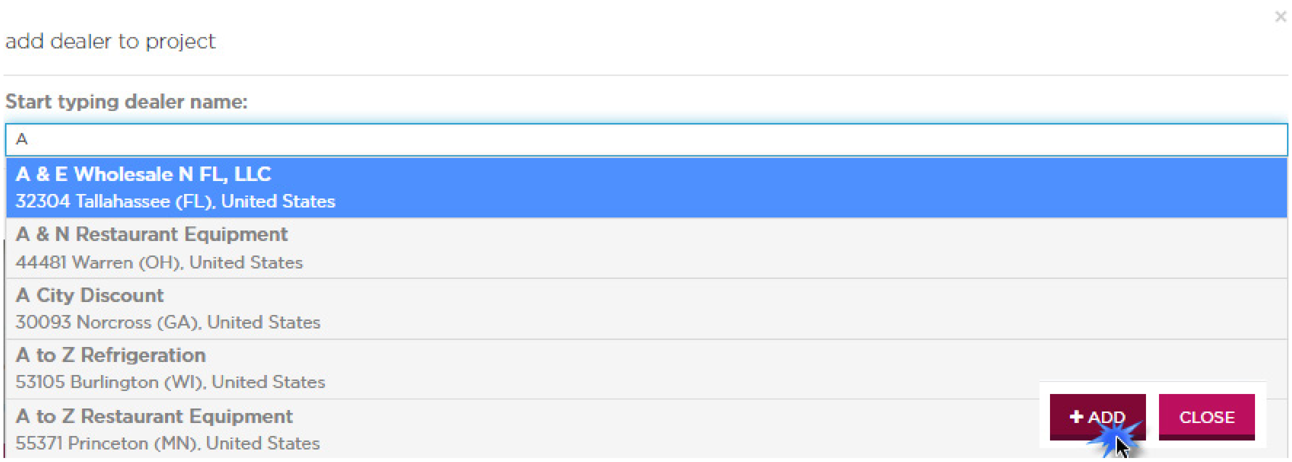


How to Add or Award a Dealer to an Existing Project

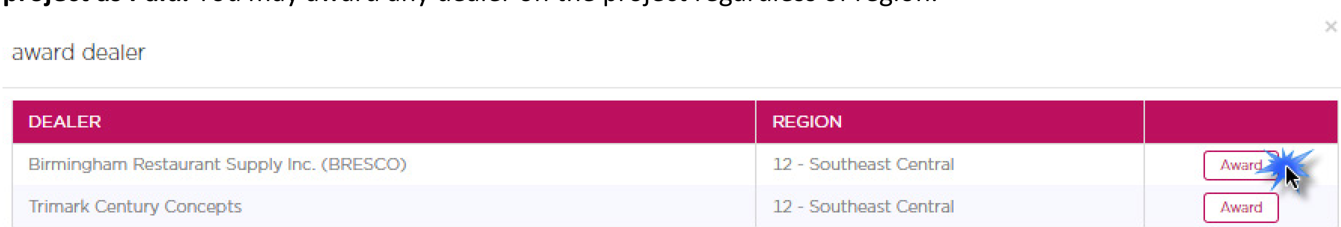
To add a dealer on a project, you need to click Add or Award in the Dealers column on the My Projects screen. Navigating to My Projects and then find the project, where you would like to Add or Award the dealer.



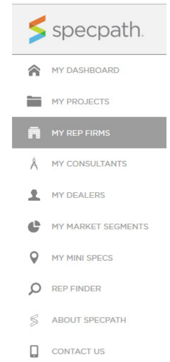
1. **ADD DEALER BUTTON** – The **Add Dealer Button** allows you to add a dealer to this project. **Note:** You may **add a Dealer from ANY region to the project.** When you click Add the following screen will appear. Start typing the name of the dealer and then **click "Add"** to add them to the project.



2. **AWARD DEALER BUTTON** – The **Award Button Button** allows you to award the dealer on the project. Note: **You must award a Dealer** to the project **before you can enter in a PO#, ACK, INV# or mark the project as Paid.** You may award any dealer on the project regardless of region.

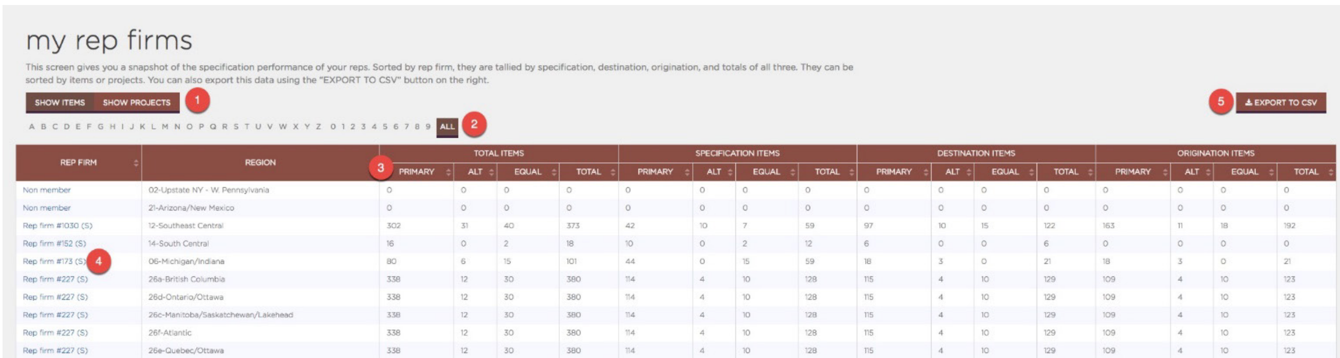


My Rep Firms



This screen gives you a great snapshot of the specification performance of your reps. If you are looking to push spec credit incentives for your reps, this is an ideal screen to track it. You will see all specs by rep firm, and they are tallied by specification, destination, origination, and totals of all three.

You can also export this data using the “EXPORT TO CSV” button on the right.



You may view a specific consultant or group of consultants in various ways:

1. **View** rep firms by items, or by projects.

2. **Sort** firms by alpha numeric characters.

3. View by **total items, or by specification, destination, or origination credits**. Simply click the top of each column to sort by spec type.

4. **You will also notice all firm names are in blue.** This indicates these are active links. Click on the firm, or anywhere within the row, and you will immediately see more detailed information for that firm below.

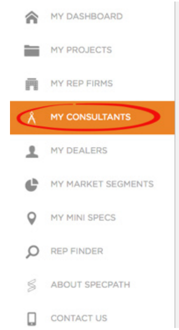
5. **For additional sorting,** simply click export to CSV on the right-hand side, and a comma separated values file, or CSV, will download into your browser. Simply open the file in a data management program like Excel, and you can manipulate the data however you like.

6. If an individual firm has been selected, a details table will appear at the bottom of the page. The detailed information below is contingent on which firm you clicked on, your current view (items/projects) and in which part of the row. For instance, if you have chosen Rep #767, and are viewing under ITEMS, and click under SPECIFICATION, the detailed data below will show you the total number of all item specification types you currently have for your projects for that rep, including primary, alternative, and equal. And if you scroll to the right, you will also see a total count of all items. To drill down further, simply click on the brand name, and an expanded list of projects for that firm will appear.

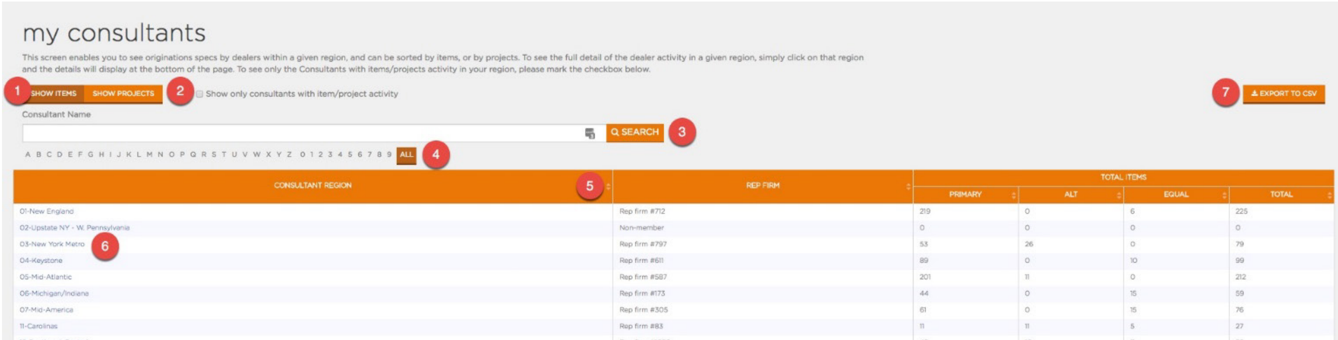
Rep firm #767 (S) 6	15-Texas/Oklahoma	1258	57	49	1364	344	19	3	366	470	18	27	515	444	20	19	483
Rep firm #797 (S)	03-New York Metro	256	75	3	334	53	26	0	79	134	26	1	161	69	23	2	94
Rep firm #83 (S)	11-Carolinas	112	33	15	160	11	11	5	27	56	11	5	72	45	11	5	61
Rep firm #839 (S)	25-Northwest	72	1	2	75	40	1	1	42	22	0	1	23	10	0	0	10
Rep firm #840 (S)	20-Mountain States North	288	2	25	315	211	1	23	235	35	1	1	37	42	0	1	43
Rep firm #966 (S)	22-Southern California	306	2	1	309	88	1	0	89	100	0	0	100	118	1	1	120
TOTAL COUNTS		6981	342	492	7815	2290	108	173	2571	2363	115	168	2646	2328	119	151	2598

BRAND	REP FIRM	REGION	TOTAL ITEMS			
			PRIMARY	ALT	EQUAL	TOTAL
Brand #294	Rep firm #767	15-Texas/Oklahoma	1258	57	49	1364
TOTAL COUNTS			1258	57	49	1364

My Consultants



This screen enables you to track specification items by consultant, and can be sorted by items, or by projects. Dealers are categorized by region. To see the consultant activity within that region, simply click on the region name. You can also export this data using the EXPORT TO CSV button on the right.



TIP: Be sure to click on the Consultant rows to reveal more detail about your manufacturers.

You may view a specific consultant or group of consultants in various ways:

1. **Show Items Button** – will display your regional specification **items** designated as primaries, alternates or equals on projects in SpecPath®.
2. To only see consultants in which your products have been specified, simply click the check box. To see all consultants, simply uncheck the box.
3. Search by consultant name.
4. Sort by alpha numeric characters. - After you have selected a region, filter the consultants in that region by selecting an alphanumeric option.
5. Sort by consultant, city, state, region, or specification type. Simply click on the arrows on the top of each column.
6. You will also notice all consultant names are in blue. This indicates these are active links. Click the consultant, or anywhere within the row, and you will immediately see more detailed information for that consultant below.
7. For additional sorting, - If you wish to work with your data in an outside software tool (Excel, Word, etc.) or print the table information, you can export the table that is displayed based on your search (or no search at all) click on the Export to CSV button and all the information in your results table will be exported to a file that you can save.

   To export your data, you can either open the file with Microsoft Excel, or another program, or you can save the file directly to your computer or laptop. The file is saved as a comma separated file through the download function in your browser.

26a-British Columbia

CONSULTANT	CITY	STATE	REGION	REP FIRM	TOTAL ITEMS		
					PRIMARY	ALT	EQUAL
Designed Food Facilities Inc.	Langley	BC	26a-British Columbia	Rep firm #227	0	0	0
DGA Design 8	Richmond	BC	26a-British Columbia	Rep firm #227	1	0	0
Food Systems Consulting Inc.	New Westminster	BC	26a-British Columbia	Rep firm #227	0	0	0
Goodbrand GalleyWorks Inc.	Langley	BC	26a-British Columbia	Rep firm #227	0	0	0
Grant Thornton	Victoria	BC	26a-British Columbia	Rep firm #227	0	0	0
Joey Restaurant Group	Vancouver	BC	26a-British Columbia	Rep firm #227	0	0	0
Lisa Bell & Associates	Surrey	BC	26a-British Columbia	Rep firm #227	0	0	0
Nomis Management Inc.	Burnaby	BC	26a-British Columbia	Rep firm #227	0	0	0
PATRN Productions Ltd	Port Moody	BC	26a-British Columbia	Rep firm #227	0	0	0
SmartDesign Group	Vancouver	BC	26a-British Columbia	Rep firm #227	0	0	0
W. Goodbrand & Associates	Langley	BC	26a-British Columbia	Rep firm #227	0	0	0
WHG Design Ltd.	Burnaby	BC	26a-British Columbia	Rep firm #227	0	0	0
TOTAL COUNTS					1	0	0

26a-British Columbia → DGA Design

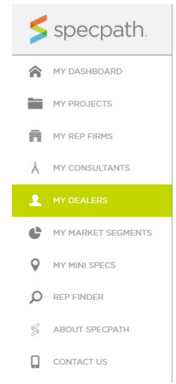
BRAND	REGION	REP FIRM	TOTAL ITEMS		
			PRIMARY	ALT	EQUAL
Brand #294	26a-British Columbia	Rep firm #227	1	0	0
TOTAL COUNTS			1	0	0

26a-British Columbia → DGA Design → Brand #294

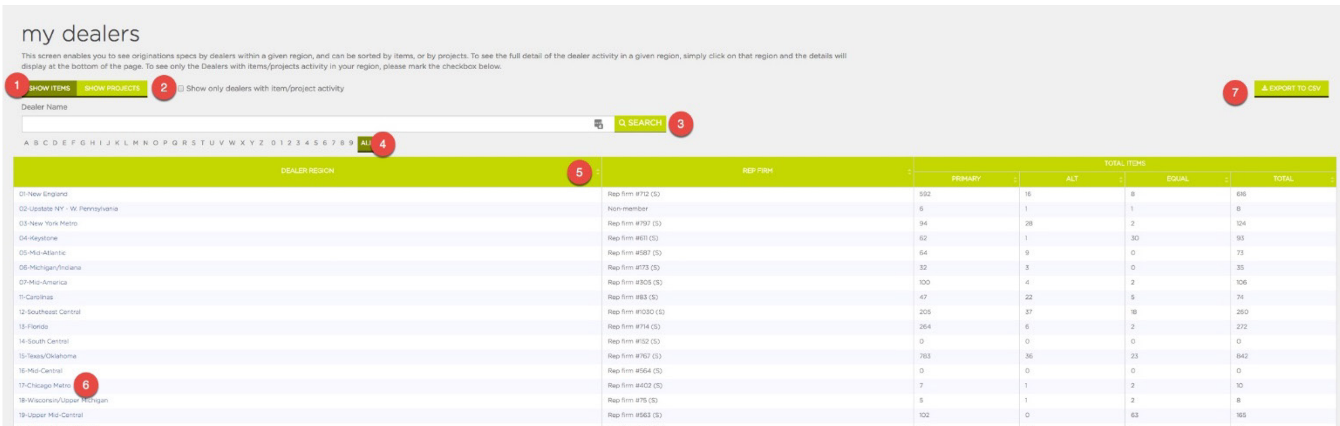
PROJECT	ITEM	REGION	REP FIRM	TOTAL ITEMS		
				PRIMARY	ALT	EQUAL
Project #381	SHELVING	26a-British Columbia	Rep firm #227	1	0	0
Project #381	CLEAN SHELVING	26a-British Columbia	Rep firm #227	1	0	0
TOTAL COUNTS				2	0	0

8. If a consultant has been selected, a details table will appear at the bottom of the page. The detailed information is a breakdown of brand specification by items, or by project. For instance, if you have chosen Consultant X, and are viewing under ITEMS, the detailed data below will show you the total number of all item specification types you currently have for your brands with that consultant, including primary, alternative, and equal. And if you scroll to the right, you will also see a total count of all items. To drill down further, simply click on the brand name, and an expanded list of projects for that consultant will appear.

My Dealers



This screen enables you to track origination items by dealer, and can be sorted by items, or by projects. Dealers are categorized by region. To see the dealer activity within that region, simply click on the region name. You can also export this data using the EXPORT TO CSV button on the right.



TIP: <u>Be sure to click on the Dealer rows to reveal more detail about your manufacturers.</u>

You may view your brand's origination specifications in various ways:

1. **Show Items Button** – will display your regional origination **items** designated as primaries, alternates or equals on projects in SpecPath®.

2. **To only see dealers bidding on projects** in which your products have been specified, click the check box. To see all dealers, simply uncheck the box.

3. Search by dealer **keyword**.

4. **By the Alphanumeric selectors** – After you have selected a region, filter the dealers in that region by selecting an alphanumeric option.

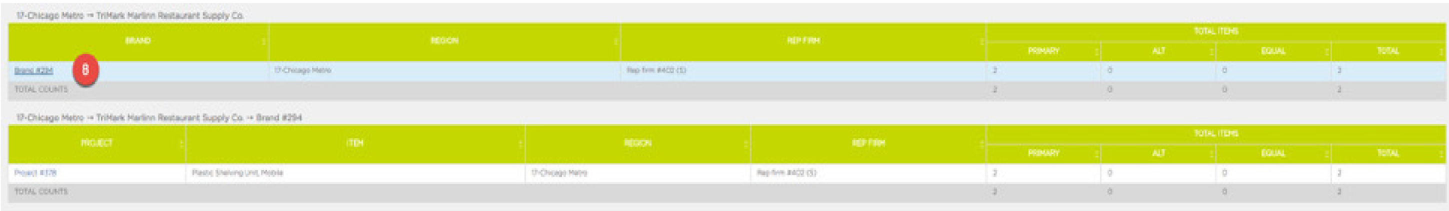
5. **Sort** by dealer, city, state, region, or specification type. Simply click on the arrows on the top of each column.

6. **You will also notice all region names are in blue**. This indicates these are active links. Click the region, or anywhere within the row, and you will immediately see more detailed information for the dealer activity in that region below.

7. **Export to CSV Button** - If you wish to work with your data in an outside software tool (Excel, Word, etc.) or print the table information, you can export the table that is displayed based on your search (or no

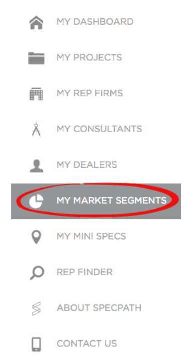
search at all) click on the Export to CSV button and all the information in your results table will be exported to a file that you can save.

To export your data, you can either open the file with Microsoft Excel, or another program, or you can save the file directly to your computer or laptop. The file is saved as a comma separated file through the download function in your browser.

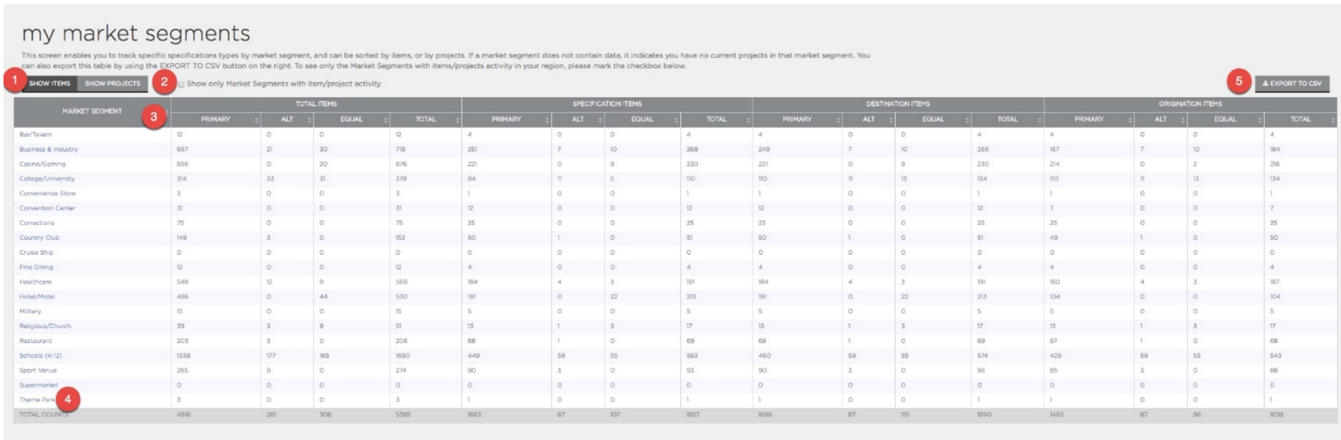


8. If a region has been selected, a details table will appear at the bottom of the page. The detailed information is a breakdown of dealer activity by items, or by project. For instance, if you have chosen region 17, and are viewing under ITEMS, the detailed data below will show you the total number of all item specification types you currently have with dealers in that region, including primary, alternative, and equal. And if you scroll to the right, you will also see a total count of all items with your chosen dealer. To drill down further, simply click on the dealer name, and an expanded list of items for that product will appear. Click your brand, and the associated projects will appear.

My Market Segments



This screen enables you to track specific specifications types by market segment, and can be sorted by items, or by projects. You can also export this data using the "EXPORT TO CSV" button on the right.



TIP: **Be sure to click on the Market Segment rows to reveal more detail about your manufacturers.**

You may view a specific market segment in various ways:

1. **Show Items Button** – will display the Market Segment and the number of items that are designated as primaries, alternates or equals on projects in SpecPath®.

2. **To only see market segments** in which your products have been specified, click the check box. To see all dealers, simply uncheck the box.

3. **Sort by market segment,** or specification type. Simply click on the arrows on the top of each column.

4. **You will also notice all market segments are in blue**. This indicates these are active links. Click the segment, or anywhere within the row, and you will immediately see more detailed information for that dealer below.

5. **For additional sorting** to work with your data in an outside software tool (Excel, Word, etc.) or print the table information, you can export the table that is displayed based on your search (or no search at all) click on the Export to CSV button and all the information in your results table will be exported to a file that you can save.

To export your data, you can either open the file with Microsoft Excel or another program or you can save the file to your computer or laptop. The file is saved as a comma separated file through the download function in your browser.

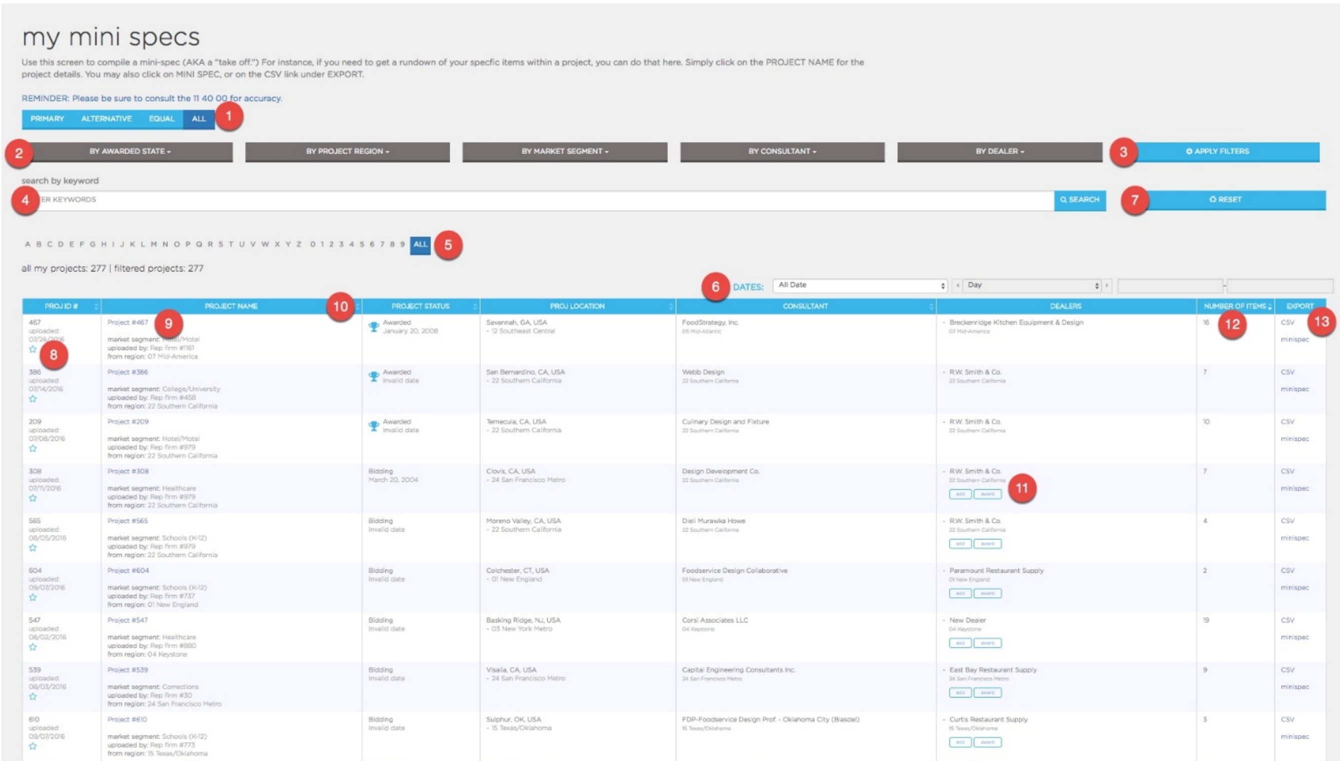
BRAND	TOTAL ITEMS			
	PRIMARY	ALT	EQUAL	TOTAL
Brand #294 6	3	0	0	3
TOTAL COUNTS	3	0	0	3

BRAND NAME	PROJECT	PRIMARY ITEMS	ALT ITEMS	EQUAL ITEMS	TOTAL ITEMS
Brand #294	Project #368	3	0	0	3
TOTAL COUNTS		3	0	0	3

6. If a segment has been selected, a details table will appear at the bottom of the page. The detailed information is a breakdown of brand specification by items, or by project. For instance, if you have chosen corrections as your market segment, and are viewing under ITEMS, the detailed data below will show you the total number of all item specification types you currently have for your brands within that segment, including primary, alternative, and equal. And if you scroll to the right, you will also see a total count of all items. To drill down further, simply click on the brand name, and an expanded list of projects in that segment product will appear.

My Mini Specs

Use this screen to compile a mini-spec (AKA a "take off.") For instance, if you need to see a rundown of all your items in a specific project, you can do that here. Simply click on the CSV link under EXPORT. If you would like to quickly see the entire project, click on the project name.



You may search for a specific Project or group of Projects in various ways:

1. **Sort** your PRIMARY, ALTERNATIVE, and EQUAL specifications. To see all projects, simply click, ALL MY PROJECTS.

2. **Filter** your projects by any combination of: awarded state, project region, market segment, consultant, or dealer.

3. To **apply** your chosen filters, click APPLY FILTERS.

4. Search for projects by **keyword**.

5. Sort projects by **alpha numeric character**.

6. To sort by **upload date, estimated bid date, or awarded date**, choose from the drop down menu, input your dates accordingly, and click APPLY FILTERS.

7. Click to **reset** any filters or sorting options.

8. **To favorite an item**, simply click the star next to the project. When it is a solid blue, it has been favorited. To remove, simply click again.

9. **You will notice the project names are in blue.** This indicates they are active links. Click on them, and you will be taken to the mini spec for that project.

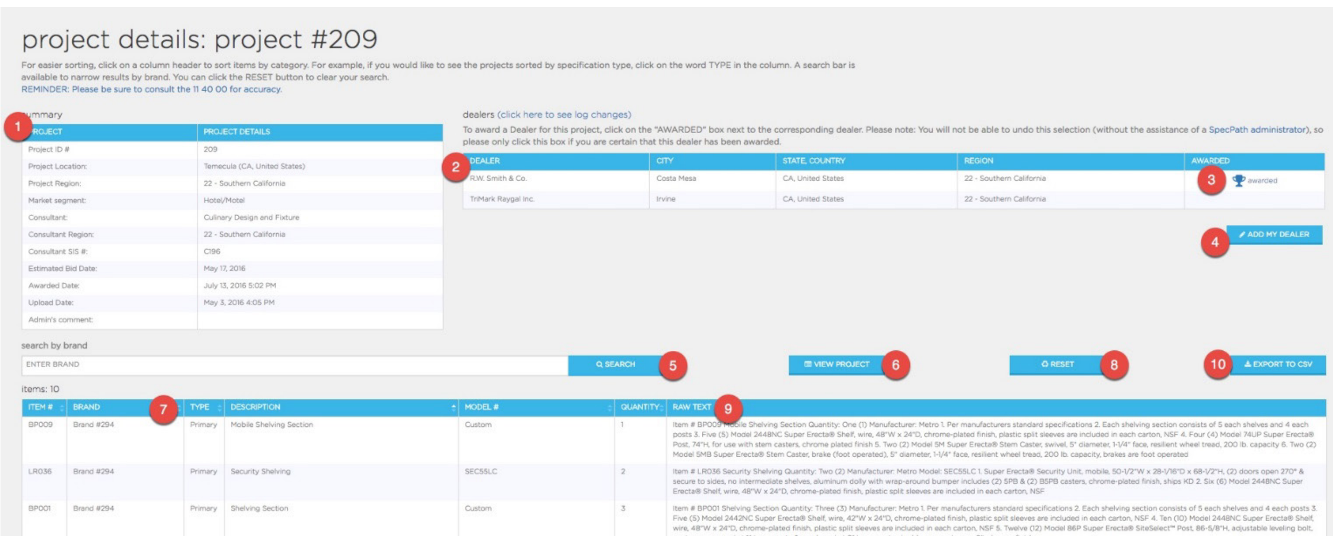
10. To sort by a **column header**, (PROJECT NAME, LOCATION, CONSULTANT, etc.) simply click the arrows at the top of the column.

11. You will notice under the **DEALER column**, there is a complete list of bidding dealers for each project. To add a dealer, simply click ADD. (see below instructions for adding a dealer.) If you're certain a dealer has been awarded the project, click AWARD. A confirmation screen will appear, and you will need to press AWARD again. To cancel, click CANCEL.

12. This is a **count** of your specified items in the project.

13**. For additional sorting,** simply click export to CSV on the right-hand side, and a comma separated values file, or CSV of your minispec for that project will download into your browser. Simply open the file in a data management program like Excel, and you can manipulate the data however you like. You may also click "minispec" to be taken to the minispec for that project.

Project Details for Mini Spec



1. A **summary** table of relevant project information.

2. Dealers that are **actively bidding**, or have been awarded the project.

3. If the project has been awarded, you will see this **trophy icon.**

4. **If they project has not been awarded**, and you would like to add a bidding dealer to an existing project, click ADD MY DEALER.

5. Search my brand **keyword**.

6. **To see the full project details page,** click VIEW PROJECT.

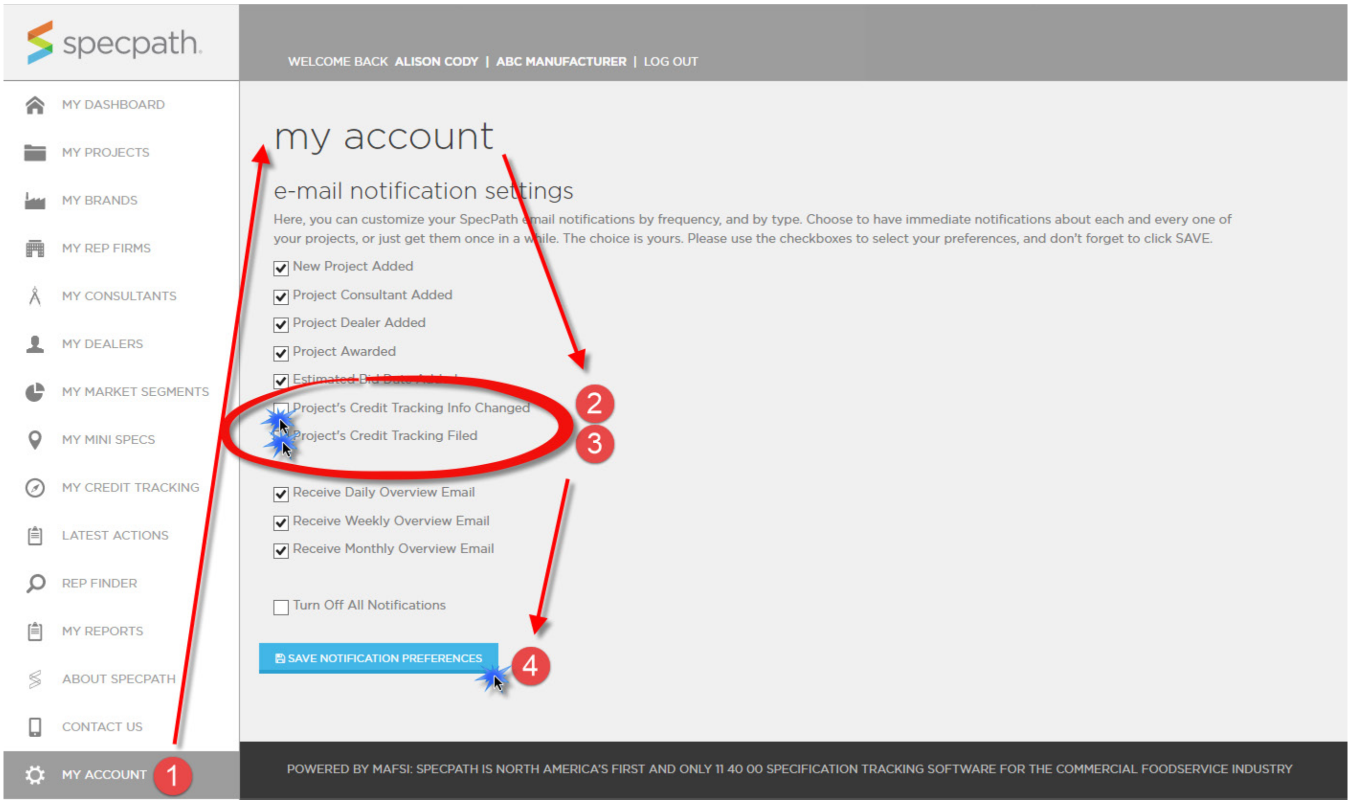
7. To sort by a **column header**, (BRAND, TYPE, etc.) simply click the arrows at the top of the column.

8. Click to **reset** any filters or sorting options.

9. **For additional sorting**, simply click export to CSV on the right-hand side, and a comma separated values file, or CSV of the mini spec will download into your browser. Simply open the file in a data management program like Excel, and you can manipulate the data however you like.

My Credit Tracking

First Step for MCT – Go to My Account and click the following boxes to receive Credit Tracking notifications.



1. **MY ACCOUNT** – Click this sidebar tab to open the **My Account module**. This is the module which contains **your e-mail preferences**.

2. **PROJECT'S CREDIT TRACKING INFO CHANGED** – The **Project's Credit Tracking Info Changed** checkbox will trigger instant e-mails for you, **every time a rep or someone from your company adds any sort of tracking information**, such as a **PO#, ACK# of INV#** to your projects.

   Note: If you choose **Daily, Weekly or Month Overview Emails**, the **Project's Credit Tracking Info Changed** information **will be included automatically on these emails.**

3. **PROJECT'S CREDIT TRACKING FILED** - The **Project's Credit Tracking Filed** checkbox will trigger instant e-mails to you, every time one of your rep files a SpecPath Credit Request Form for one of your brands.

   Click on the link to see the [sample SpecPath Credit Request Form]() that is sent to the factory by the rep, by e-mail. **The rep that that files the SpecPath Credit Request Form will be copied on the e-mail.**

   Note: If you choose **Daily, Weekly or Month Overview Emails,** the **Project's Credit Tracking** information **will be included automatically on these emails.**

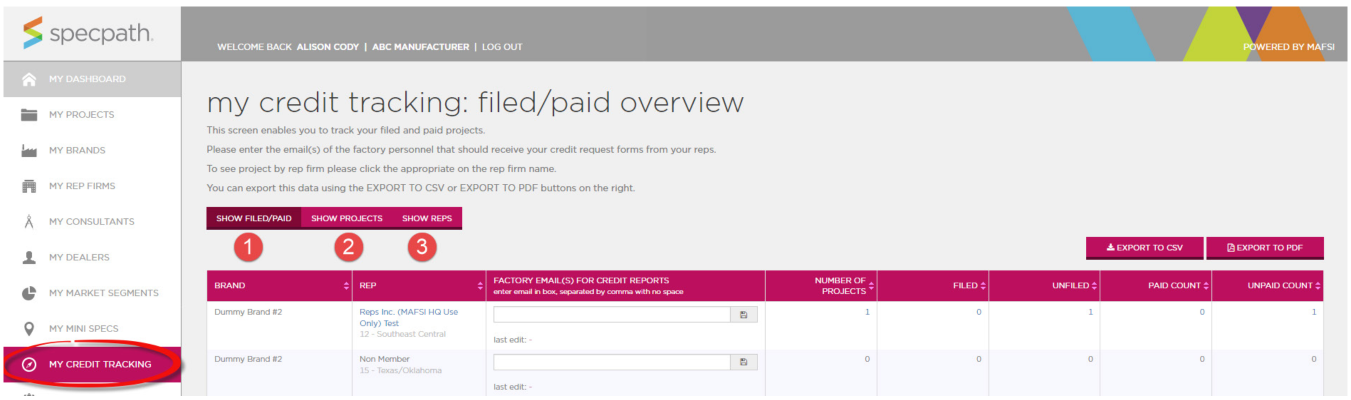
4. **SAVE NOTIFICATION PREFERENCES –** Click **Save Notification Preferences** to save your selections.

My Credit Tracking Modules

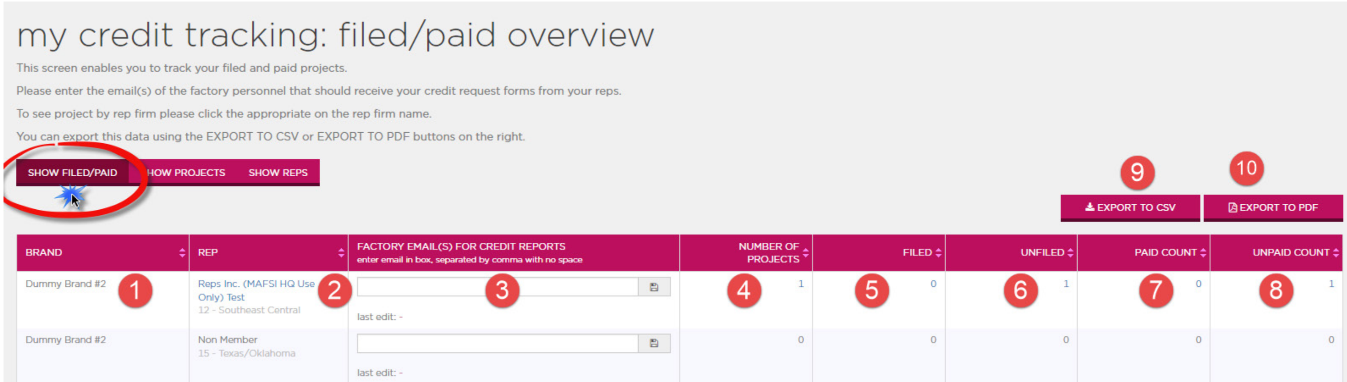
The My Credit Tracking module allows you to track the specification, destination and origination credits for your rep groups. This module has three distinct sections.

They are:

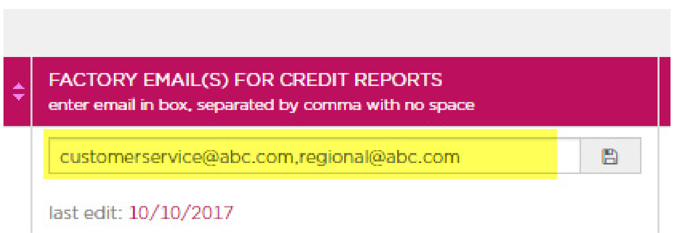
1. **Show Filed/Paid –** On this screen, you will enter the email(s) of the factory personnel that should receive your credit forms from the reps.
2. **Show Projects -** This screen enables you to track your projects' specification, destination and origination credits in an overview format.
3. **Show Reps -** This screen enables you to track specification, destination and origination credits in an overview format or by rep firm or project.



Show Filed/Paid



1. **BRANDS** – The **Brand Column** lists your brands, and is sortable, if you have more than one brand.
2. **REP** – The **Rep Column** lists your rep firms and their region, and is sortable by rep firm name. If you have more than one brand, there is a rep listed for each brand.
3. **FACTORY EMAIL(S) FOR CREDIT REPORTS** – Enter in the email or emails (separated by comma with no space) for all contacts, at the factory, who should receive your credit filings. Click on the link to see the sample SpecPath Credit Request Form that is sent to the factory by the rep, by e-mail. **The rep that that files the SpecPath Credit Request Form will be copied on the e-mail.**

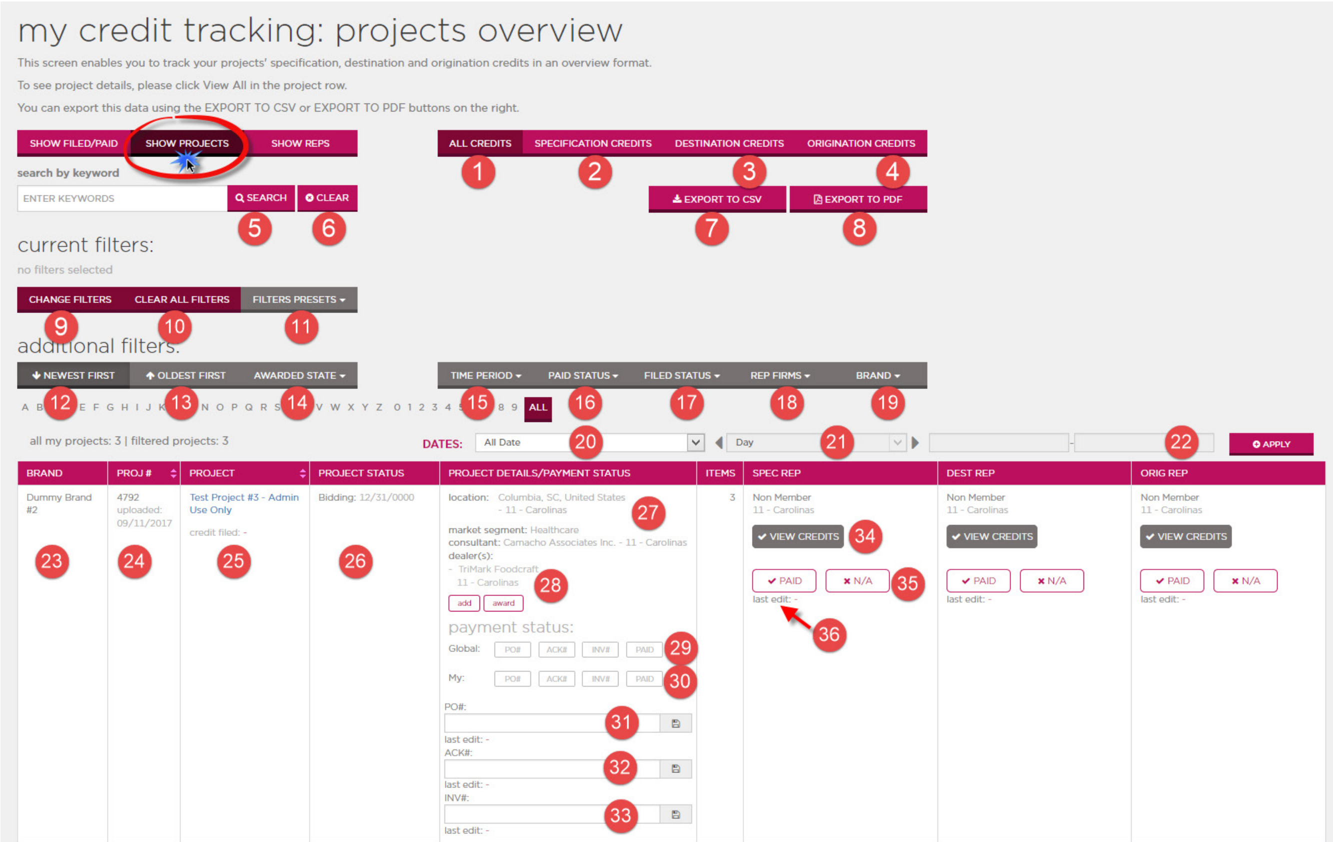
   

   HELPFUL HINT: You could enter the name of the Customer Service personnel, but also the Regional Sales managers for each of the reps.

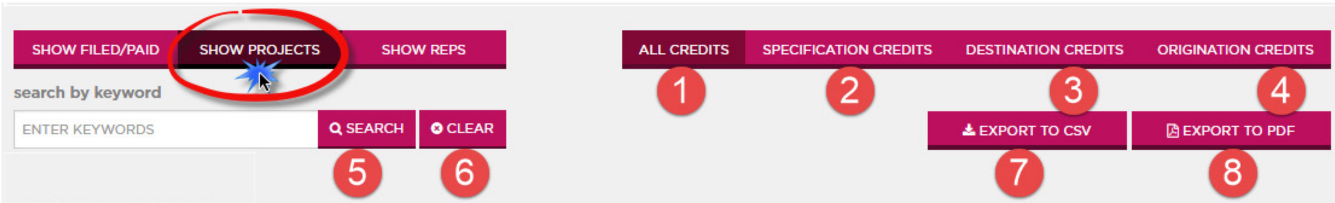
4. **NUMBER OF PROJECTS** - The **Number of Projects Column** lists the **total number of projects** for each of your rep firms by brand, and is sortable.
5. **FILED** - This column lists the number of **Filed Projects** for each of your rep firms by brand, and is sortable.
6. **UNFILED** - This column lists the number of **Unfiled Projects** for each of your rep firms by brand, and is sortable.
7. **PAID COUNT** - This column lists the number of **Paid Projects** for each of your rep firms by brand, and is sortable.
8. **UNPAID COUNT** - This column lists the number of **Unpaid Projects** for each of your rep firms by brand, and is sortable.
9. **EXPORT TO CSV** – This button exports the **Show Filed/Paid** table to a **CSV file**.
10. **EXPORT TO PDF** – This button exports the **Show Filed/Paid** table to a **PDF file**.

Show Projects

The Show Projects screen enables you to track your projects' specification, destination and origination credits for your rep firms, in an overview format.



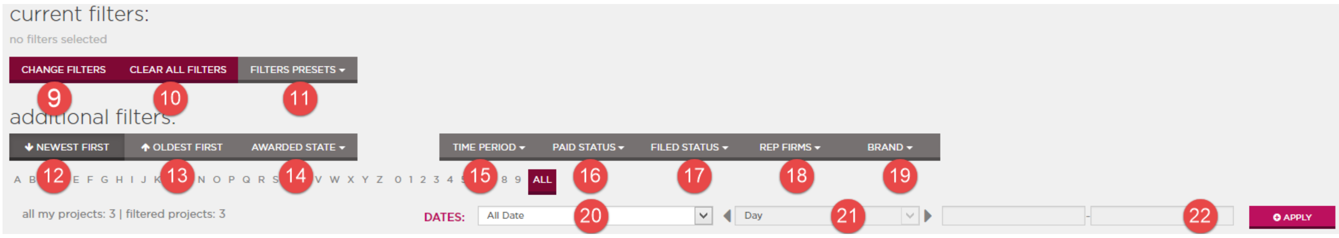
Show Projects – Buttons – Top of Page



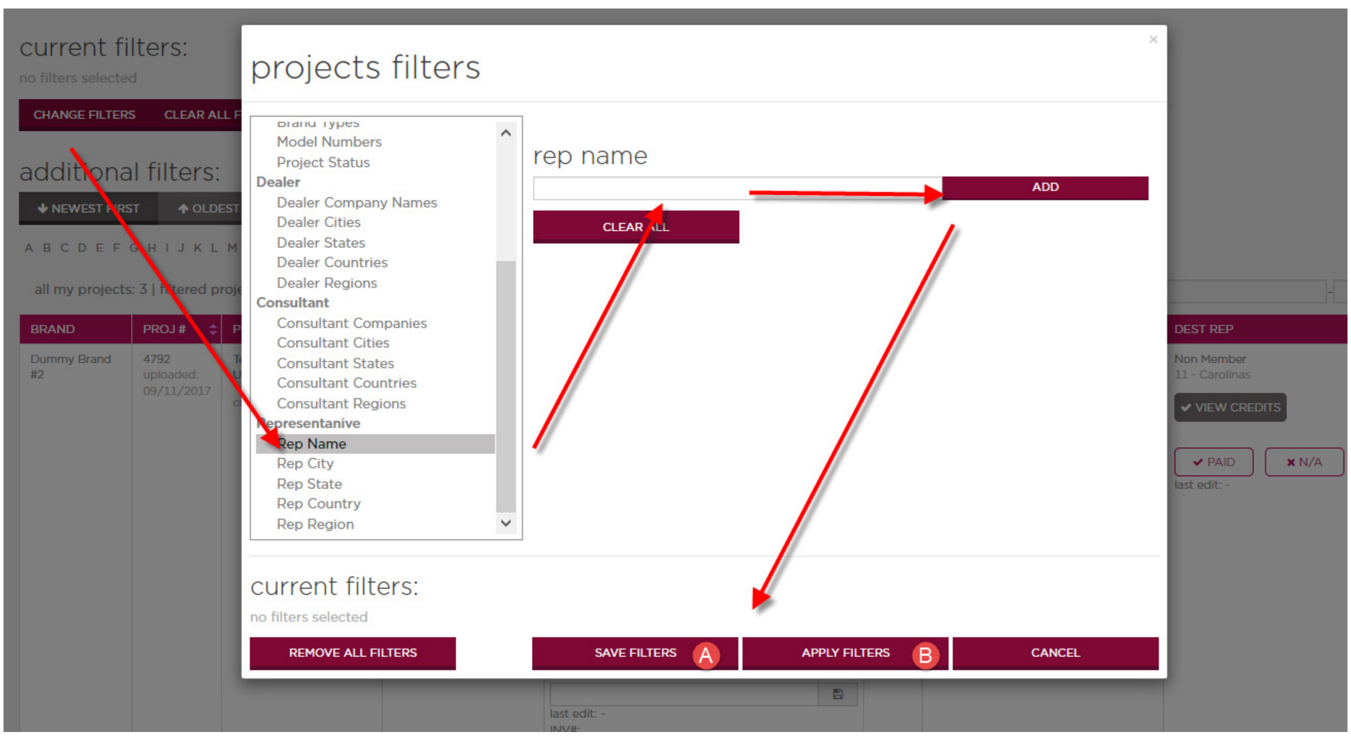
1. **ALL CREDITS** - This button will show you all your projects where your rep firms are eligible for one (or a combination) of the following credits: Specification, Destination and/or Origination.
2. **SPECIFICATION CREDITS** – Clicking this button will show you all your projects where your rep firms are eligible for **Specification (Consultant Location) Credits**.
3. **DESTINATION CREDITS** – Clicking this button will show you all your projects where your rep firms are eligible for **Destination (Project Location) Credits**.
4. **ORIGINATION CREDITS** – Clicking this button will show you all your projects where your rep firms are eligible for **Origination (Dealer Location) Credits**.
5. **KEYWORD SEARCH** – Enter in a keyword for the project (project name, consultant, dealer, city, market segment, etc.) and click Search.

   NOTE: This keyword search DOES NOT work on brand. Please use the BRAND drop down filter (#19) to perform a brand search.
6. **CLEAR –** This box is used to Clear any search results or any other filters you may have chosen on the page, such as Paid Status (#16), Filed Status (#17), etc.
7. **EXPORT TO CSV** – This button exports the **Show Projects** table to a **CSV file**.
8. **EXPORT TO PDF** – This button exports the **Show Projects** table to a **PDF file**.

Show Projects – Filter Buttons – Middle of Page

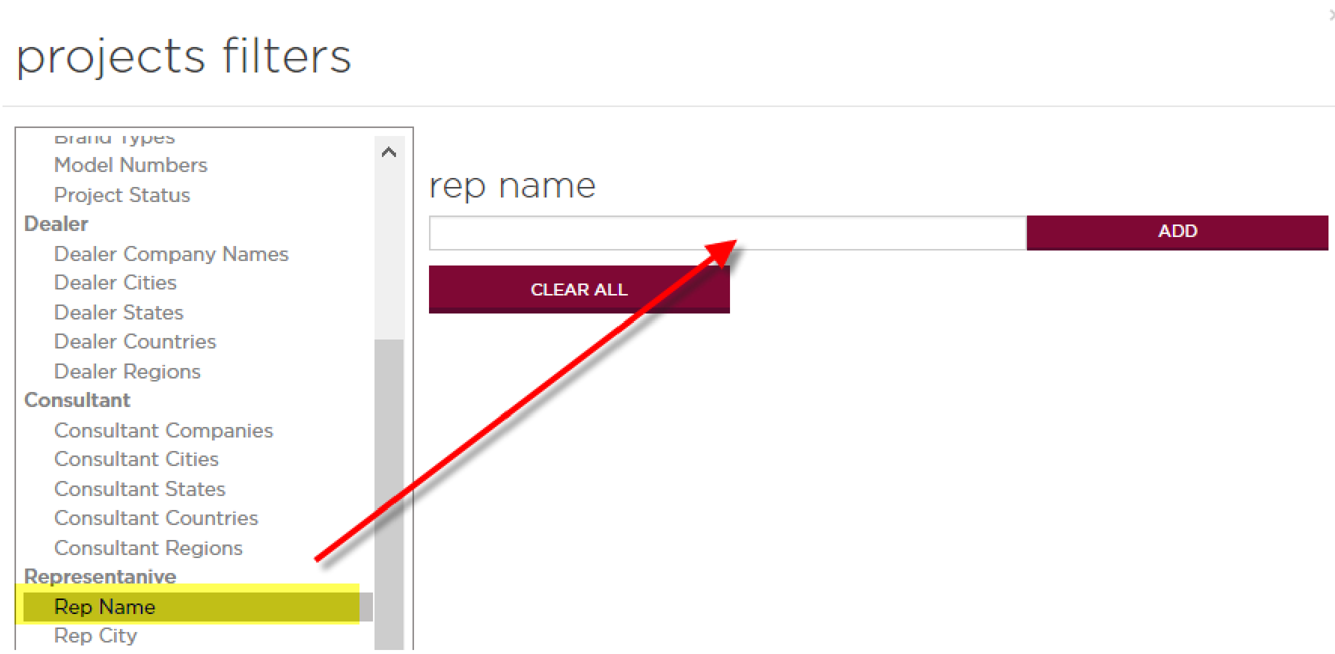


9. **CHANGE FILTERS** - These **Filters** narrow the projects in the search results in the Show Projects table. For instance, to build a filter for a few of your rep groups combined, Click the Change Filters button and follow the arrows below. Don't forget to click the "Add" button after each selection.
    a. **Save Filters** – Clicking this button will allow you to **name this filter and save for future use.** You will see this filter under #11 – Filter Presets. Note: You must refresh your browser page for this filter to show under Filter Presets.
    b. **Apply Filters** – Clicking this button will allow you to **apply this filter for one time use only.**

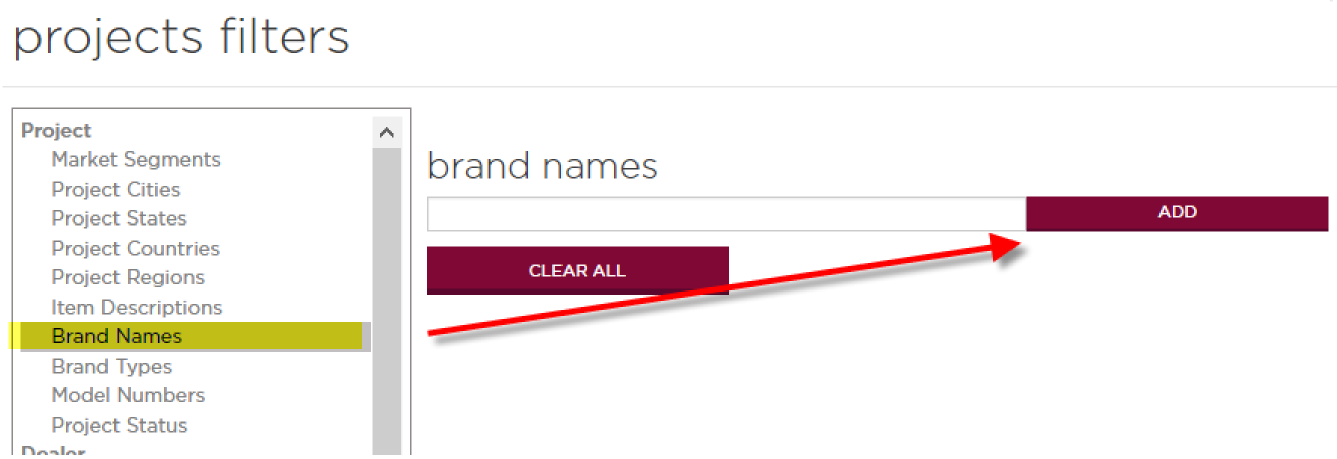


10. **CLEAR ALL FILTERS** - This button **Clears All Filters** that have been applied to the search results in the Show Projects table.
11. **FILTER PRESETS** - This **Filter Preset** dropdown button shows you all the **Saved Filters** that you have created under **Change Filters** and then clicked **Save Filters.** To delete a Filter Preset, please click the "X" next to the name of the saved Filter.

12. **NEWEST FIRST** - The **Newest First Filter** sorts the projects in the search results with the newest project on top in the Show Projects table. Default sort order is Project Number, which is usually in line with the newest to oldest project dates, but this option exists, just in case.
13. **OLDEST FIRST** - The **Oldest First Filter** sorts the projects in the search results with the oldest project on top in the Show Projects table. Default sort order is Project Number, which is usually in line with the newest to oldest project dates, but this option exists, just in case.
14. **AWARDED STATE** – The **Awarded State Filter** is a quick way to drill down to Bidding or Awarded projects. By default, the program shows all projects in the Show Projects table.
15. **TIME PERIOD** – The **Time Period Filter** is a quick way to drill down to projects for **Upload Date only** for a certain time period. Quick filter choices include: **This week; This month; This quarter and This year.**
16. **PAID STATUS** – The **Paid Status Filter** is a quick way to drill down to projects with a specific paid status. Quick filter choices include: **Show only Paid and Show only Unpaid.**
17. **FILED STATUS** – The **Filed Status Filter** is a quick way to drill down to projects with a specific filed status. Quick filter choices include: Show only Filed and Show only Unfiled.
18. **REP FIRM** – The **Rep Firm Filter** is a quick way to drill down to projects for one of your rep firms. Quick filter choices include all your brands. **Note:** *If you would like to build a filter for more than one of your Rep Firms, please use Change Filters (see #9 above) and choose Project – Rep Name.*

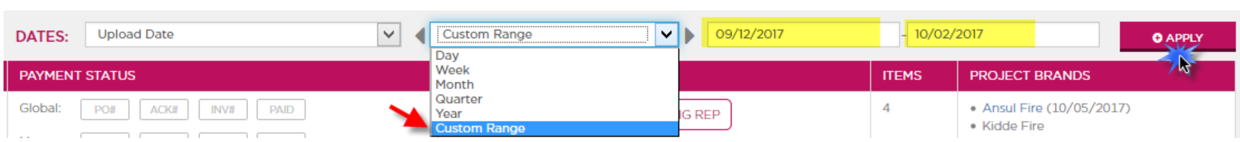


19. **BRAND** – The **Brand Filter** is a quick way to drill down to projects for one of your brands. Quick filter choices include **all your brands and each brand separately (if applicable). Note:** *If you would like to build a filter for more than one of your Brands, please use Change Filters (see #9 above) and choose Project – Brand Names.*



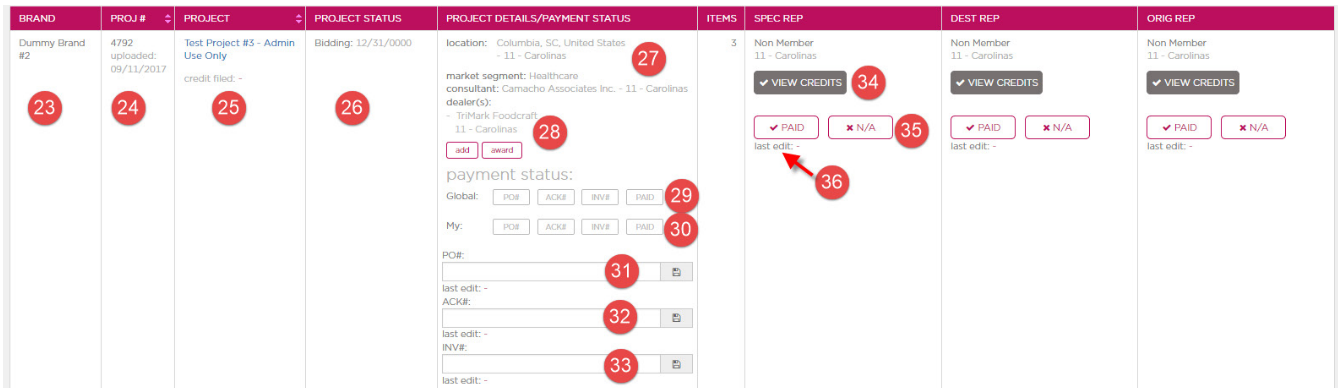
20. **DATES** – The **Dates** dropdown filter lets you narrow projects by date category including: Upload **Date; Estimated Bid Date** and **Awarded Date.**

21. **DATE PERIOD DROPDOWN** – The **Date Period Dropdown** lets you narrow the Date selection in #19 Dates by: **Day; Week; Month; Quarter; Year or Custom Range**. Use the Arrows on either side of your selection to move from week to week, month to month, etc. **Note:** To build a **Custom Range**, you must click Custom Range in the dropdown, choose your dates and click apply.

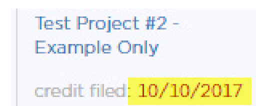


22. **DATE FIELDS** – The **Date Fields** show you which dates you are searching for. If you choose Custom, please click on Date Fields to set the custom range. See # 20 above. Note: Please click Apply to the left of the Date Fields to activate search.

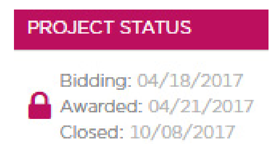
Show Projects – Projects Table



23. **BRAND** – The **Brand Column** includes your brand name for this project.
24. **PROJ #** – The **Proj # Column** includes the unique **Project Number** and **Upload Date** for the Project.
25. **PROJECT** – The **Project Column** includes the **Project Name** and the **Credit Filed Date**. The Credit Filed Date indicates the date you filed the first credit for one of you brands on the project.

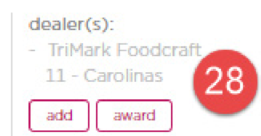


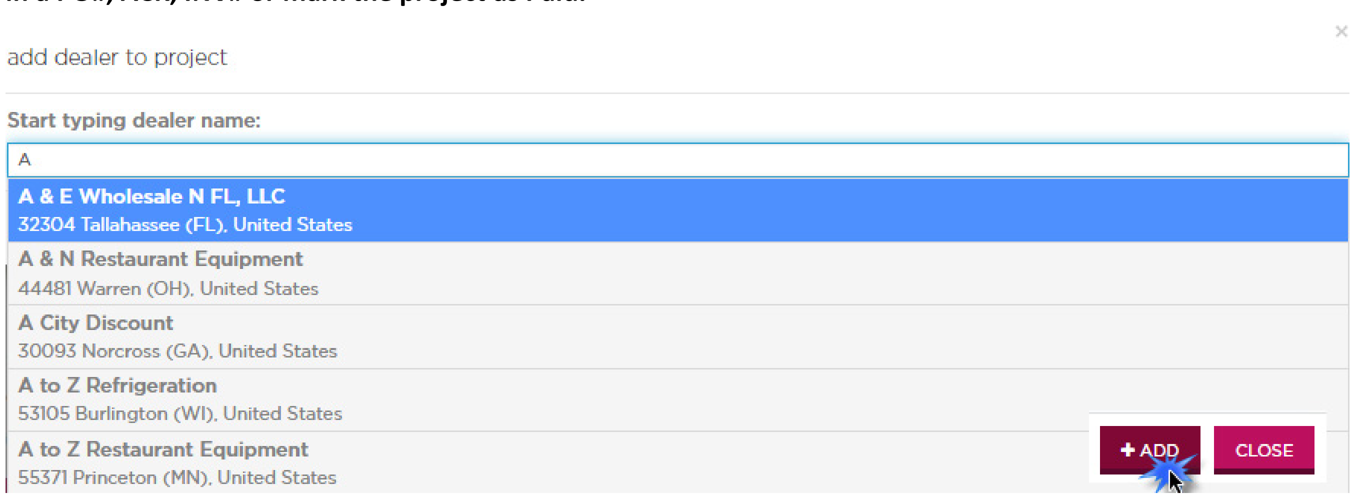
26. **PROJECT STATUS** – The **Project Status Column** includes the **Project Status (bidding or awarded)** as well as the **Bid Date (if known)**, the **Awarded Date** and the Closed Date.



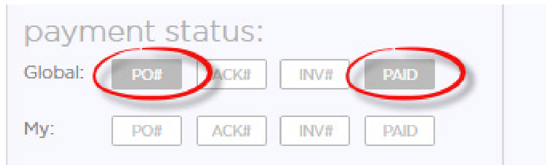
27. **PROJECT DETAILS** – The **Project Details** include the **Location, Market Segment, Consultant, and Dealer(s)** for this project.

ADD & AWARD DEALER BUTTON – The **Add Dealer Button** allows you to add a dealer to this project. **Note:** When you click Add the following screen will appear. Start typing the name of the dealer and then **click "Add"** to add them to the project. The **Award Button Button** allows you to award the dealer on the project. Note: **You must award a Dealer** to the project **before you can enter in a PO#, ACK, INV# or mark the project as Paid.**



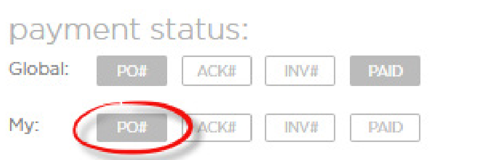


28. **GLOBAL PAYMENT STATUS** – The **Global Payment Status Boxes** show you if **your company or any rep firm on the project** has entered an **PO#, ACK#, INV#** and/or has marked the project as **PAID**. These boxes will turn gray when one of these events occur. **The purpose of these Global Payment Status buttons** is just to inform you, in a visual manner, that activity has been reported by other users on this project.



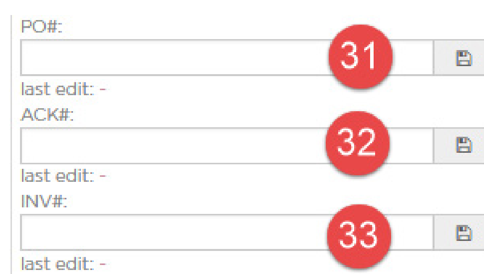
Why are Global Payment Boxes Important? These boxes are important because they let your company stay on top of the payment status of the project. E.g. If others have received a PO# for this project, but your company has not received a PO, you may want to follow up with the dealer to see why you have not received one.

29. **MY PAYMENT STATUS** – The **My Payment Status Boxes** show you if **any rep firm you have on this project** has entered an **PO#, ACK#, INV#** or has marked the project as **PAID**. These boxes will turn gray when one of these events occur. **The purpose of these My Status button**s is just to inform your company, in a visual manner, that activity has been reported by users on this project that you share product lines with.



Why are My Payment Boxes Important? These boxes are important because they let your company stay on top of the payment status of the project. E.g. If one or your reps enters a PO# for this project, you will be able to see activity on this project. Therefore, if the rep in the origination position marks this project as paid or enters in a PO#, and the spec rep and destination rep will be able to see it. Or if you, as the manufacturer, marks you as paid the reps will be able to see this. **More sharing of information means less phone calls!**

30. **PO#** – The **PO # Entry Box** allows you to enter in the **PO# once the project has been awarded**. Please click the Save button after you enter the number. **Note: You will also be able to see the PO#'s that your reps enter.**

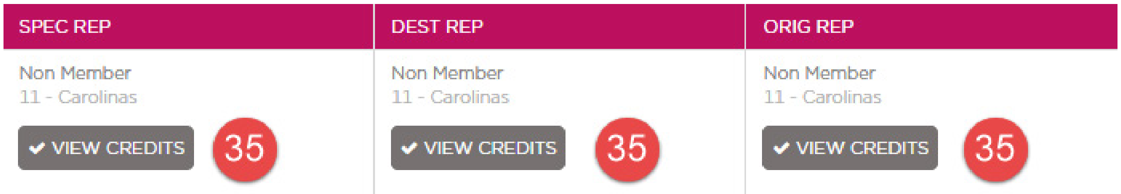


31. **ACK#** – The **ACK # Entry Box** allows you to enter in the **ACK# once the project has been awarded**. Please click the Save button after you enter the number. **Note: You will also be able to see the ACK#'s that your reps enter.**

32. **INV#** – The **INV # Entry Box** allows you to enter in the **INV# once the project has been awarded**. Please click the Save button after you enter the number. **Note: You will also be able to see the INV#'s that your reps enter.**

33. **ITEMS** – The **Items Column** shows you how many items you have on this project for all your brands combined.

34. **VIEW CREDITS** – The **View Credits Buttons** allows you to easily see the SpecPath Credit Request Form**, that are assigned to the Spec, Dest and Orig rep.** Click on the link to see the sample SpecPath Credit Request Form.

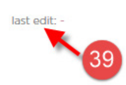


35. **SPEC REP PAID-N/A** – The **Spec Rep Column** allows you to see the spec rep on the project while the Paid and N/A buttons allow you to **mark the Item Paid or N/A**. The **Paid or N/A** buttons allows you to mark the spec rep, dest rep and orig rep on the project as Paid and N/A buttons. **If the rep marks the item as Paid or N/A, you will also be able to see that as well.**

36. **DEST REP PAID-N/A** – The **Dest Rep Column** allows you to see the Dest Rep on the project while the Paid and N/A buttons allow you to **mark the Item Paid or N/A**. The **Paid or N/A** buttons allows you to mark the spec rep, dest rep and orig rep on the project as Paid and N/A buttons. **If the rep marks the item as Paid or N/A, you will also be able to see that as well.**

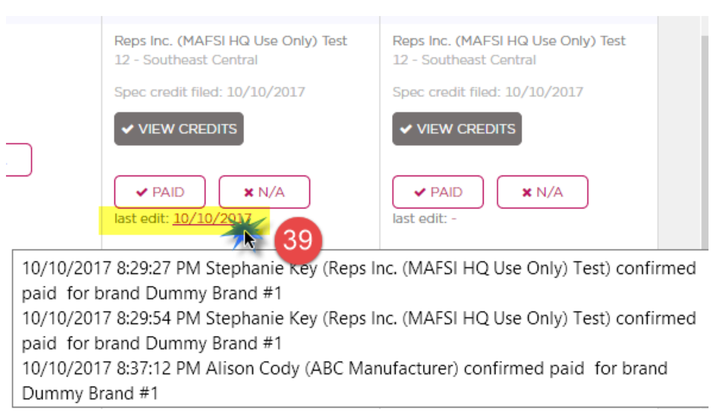
37. **ORIG REP PAID-N/A** – The **Orig Rep Column** allows you to see the Orig Rep on the project while the Paid and N/A buttons allow you to **mark the Item Paid or N/A**. The **Paid or N/A** buttons allows you to mark the spec rep, dest rep and orig rep on the project as Paid and N/A buttons. **If the rep marks the item as Paid or N/A, you will also be able to see that as well.**

38. **LAST EDIT** – The **Last Edit** hyperlink, under the **Paid and N/A Button**, will allow you to see who last edited this field. This could be one of the three reps or someone at your company.



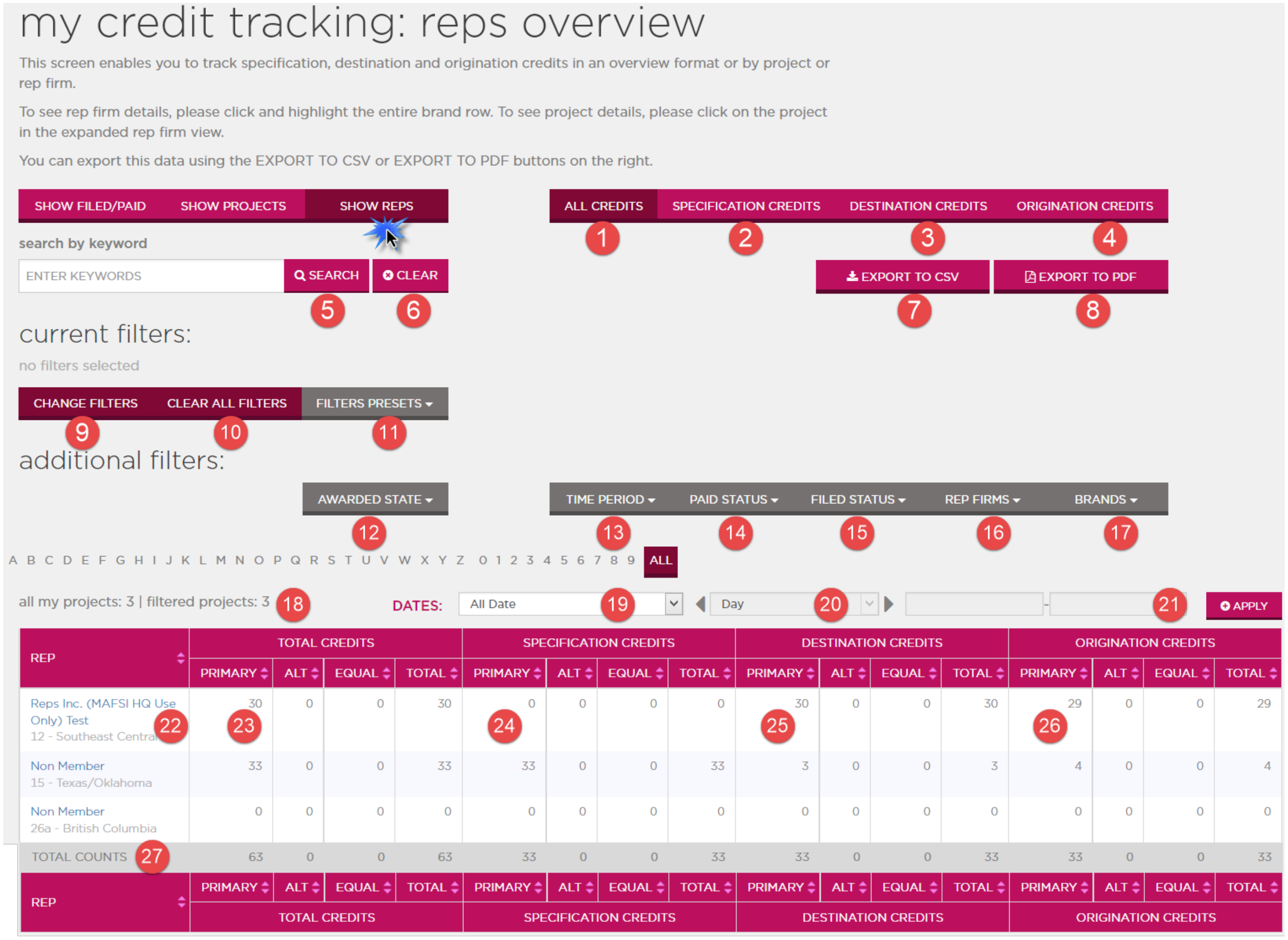
HOW TO QUICKLY SHOW THE HISTORY OF WHO FILLING IN THE VALUES OF THE FIELDS ON THIS PAGE

HELPFUL HINT: You can easily tell who is populated the fields or clicking the buttons on these pages by hovering over the date with your mouse. Please not all time is GMT.

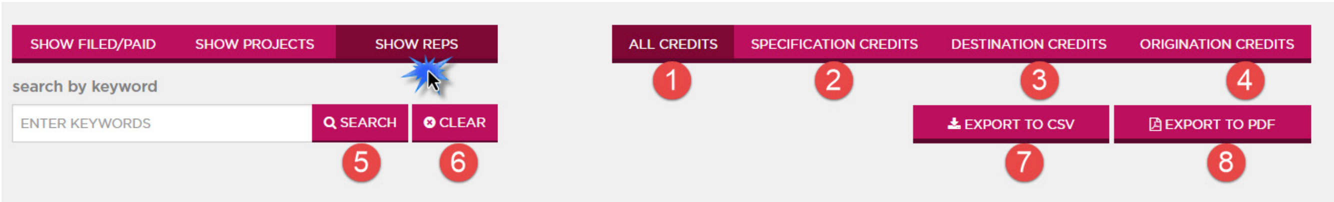


Show Reps

The Show Brands screen enables you to track specification, destination and origination credits in an overview format or by rep firm, brand or project.



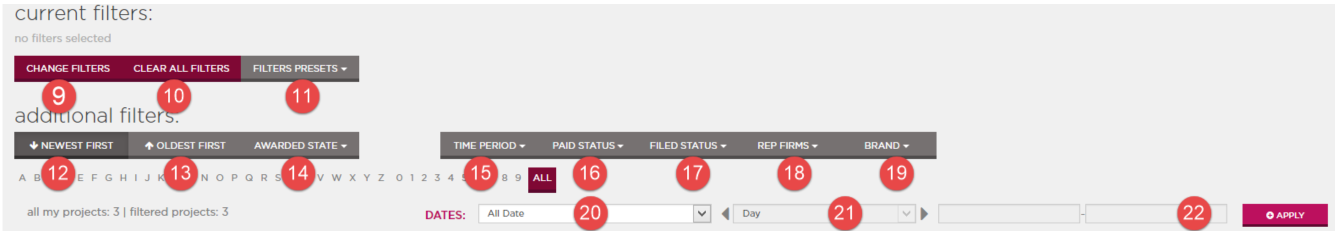
Show Projects – Buttons – Top of Page



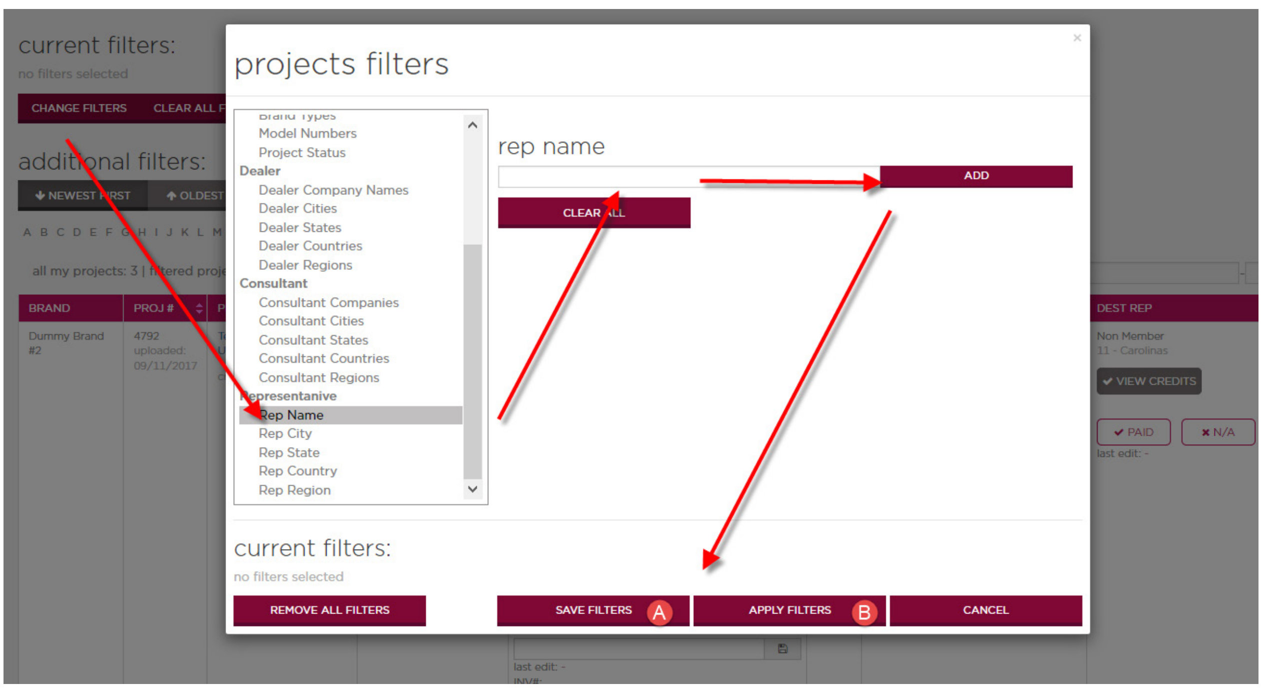
1. **ALL CREDITS** - This button will show you all your projects where your rep firms are eligible for one (or a combination) of the following credits: Specification, Destination and/or Origination.
2. **SPECIFICATION CREDITS** – Clicking this button will show you all your projects where your rep firms are eligible for **Specification (Consultant Location) Credits**.
3. **DESTINATION CREDITS** – Clicking this button will show you all your projects where your rep firms are eligible for **Destination (Project Location) Credits**.
4. **ORIGINATION CREDITS** – Clicking this button will show you all your projects where your rep firms are eligible for **Origination (Dealer Location) Credits**.
5. **KEYWORD SEARCH** – Enter in a keyword for the project (project name, consultant, dealer, city, market segment, etc.) and click Search.

   NOTE: This keyword search DOES NOT work on brand. Please use the BRAND drop down filter (#19) to perform a brand search.
6. **CLEAR –** This box is used to Clear any search results or any other filters you may have chosen on the page, such as Paid Status (#16), Filed Status (#17), etc.
7. **EXPORT TO CSV** – This button exports the **Show Projects** table to a **CSV file**.
8. **EXPORT TO PDF** – This button exports the **Show Projects** table to a **PDF file**.

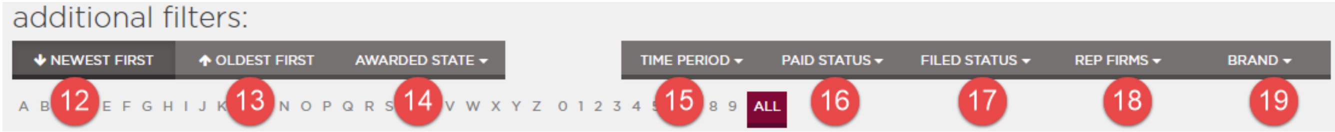
Show Projects – Filter Buttons – Middle of Page



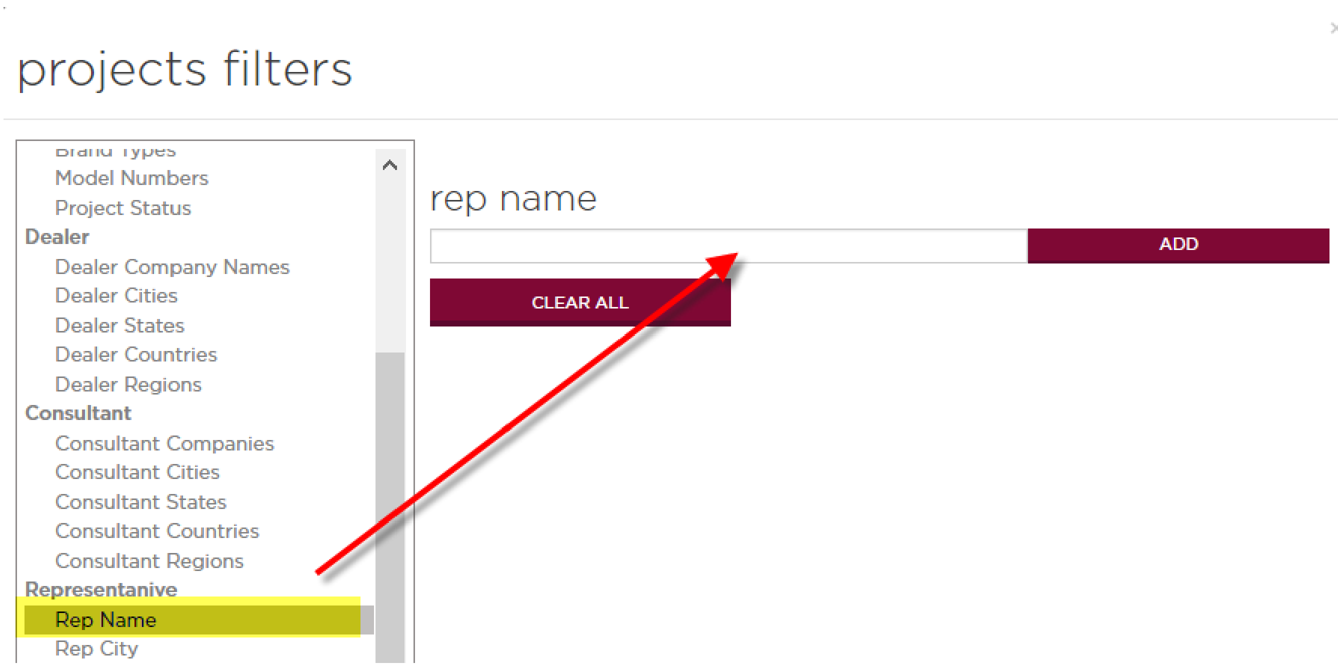
9. **CHANGE FILTERS** - These **Filters** narrow the projects in the search results in the Show Projects table. For instance, to build a filter for a few of your rep groups combined, Click the Change Filters button and follow the arrows below. Don't forget to click the "Add" button after each selection.
    a. **Save Filters** – Clicking this button will allow you to **name this filter and save for future use.** You will see this filter under #11 – Filter Presets. Note: You must refresh your browser page for this filter to show under Filter Presets.
    b. **Apply Filters** – Clicking this button will allow you to **apply this filter for one time use only.**



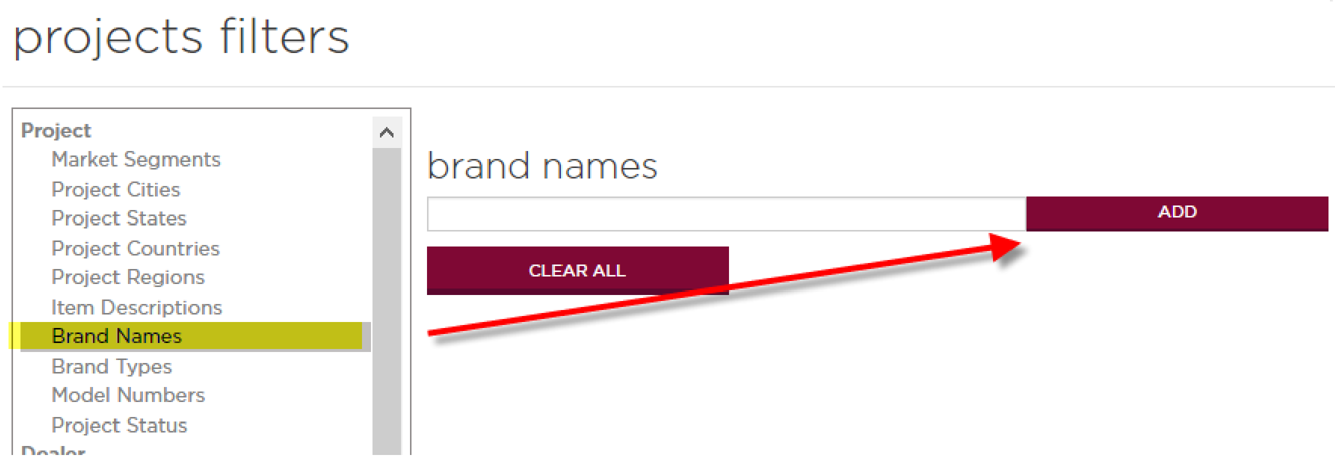
10. **CLEAR ALL FILTERS** - This button **Clears All Filters** that have been applied to the search results in the Show Projects table.
11. **FILTER PRESETS** - This **Filter Preset** dropdown button shows you all the **Saved Filters** that you have created under **Change Filters** and then clicked **Save Filters.** To delete a Filter Preset, please click the "X" next to the name of the saved Filter.



12. **NEWEST FIRST** - The **Newest First Filter** sorts the projects in the search results with the newest project on top in the Show Projects table. Default sort order is Project Number, which is usually in line with the newest to oldest project dates, but this option exists, just in case.
13. **OLDEST FIRST** - The **Oldest First Filter** sorts the projects in the search results with the oldest project on top in the Show Projects table. Default sort order is Project Number, which is usually in line with the newest to oldest project dates, but this option exists, just in case.
14. **AWARDED STATE** – The **Awarded State Filter** is a quick way to drill down to Bidding or Awarded projects. By default, the program shows all projects in the Show Projects table.
15. **TIME PERIOD** – The **Time Period Filter** is a quick way to drill down to projects for **Upload Date only** for a certain time period. Quick filter choices include: **This week; This month; This quarter and This year.**
16. **PAID STATUS** – The **Paid Status Filter** is a quick way to drill down to projects with a specific paid status. Quick filter choices include: **Show only Paid and Show only Unpaid.**
17. **FILED STATUS** – The **Filed Status Filter** is a quick way to drill down to projects with a specific filed status. Quick filter choices include: Show only Filed and Show only Unfiled.
18. **REP FIRM** – The **Rep Firm Filter** is a quick way to drill down to projects for one of your rep firms. Quick filter choices include all your brands. **Note:** *If you would like to build a filter for more than one of your Rep Firms, please use Change Filters (see #9 above) and choose Project – Rep Name.*

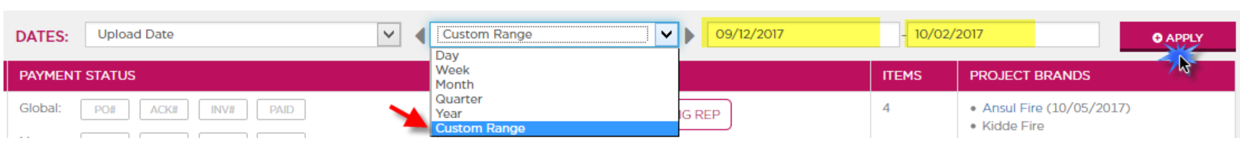


19. **BRANDS** – The **Brands Filter** is a quick way to drill down to projects for one of your brands. Quick filter choices include **all your brands and each brand separately (if applicable). Note:** *If you would like to build a filter for more than one of your Brands, please use Change Filters (see #9 above) and choose Project – Brand Names.*



20. **DATES** – The **Dates** dropdown filter lets you narrow projects by date category including: Upload **Date; Estimated Bid Date** and **Awarded Date.**

21. **DATE PERIOD DROPDOWN** – The **Date Period Dropdown** lets you narrow the Date selection in #19 Dates by: **Day; Week; Month; Quarter; Year or Custom Range**. Use the Arrows on either side of your selection to move from week to week, month to month, etc. **Note:** To build a **Custom Range**, you must click Custom Range in the dropdown, choose your dates and click apply.



22. **DATE FIELDS** – The **Date Fields** show you which dates you are searching for. If you choose Custom, please click on Date Fields to set the custom range. See # 20 above. Note: Please click Apply to the left of the Date Fields to activate search.

Show Reps– Credits Table

REP	TOTAL CREDITS				SPECIFICATION CREDITS				DESTINATION CREDITS				ORIGINATION CREDITS			
	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL
Reps Inc. (MAFSI HQ Use Only) Test 12 - Southeast Central 22	30 23	0	0	30	0 24	0	0	0	30 25	0	0	30	29 26	0	0	29
Non Member 15 - Texas/Oklahoma	33	0	0	33	33	0	0	33	3	0	0	3	4	0	0	4
Non Member 26a - British Columbia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL COUNTS 27	63	0	0	63	33	0	0	33	33	0	0	33	33	0	0	33
REP	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL
	TOTAL CREDITS				SPECIFICATION CREDITS				DESTINATION CREDITS				ORIGINATION CREDITS			

22. **REP** – The **Rep Column** shows a list of your rep firms and is sortable by clicking the header.
23. **TOTAL CREDITS** – The **Total Credits Column** shows you the **total number of credits** each rep firm has in the system listed for all of your brands, and shows them **for Primary, Alt, Equal and Total. Note:** If you apply Filters, these numbers will change accordingly.
24. **SPECIFICATION CREDITS** – The **Specification Credits Column** shows you the **number of specification credits** each rep firm has in the system listed for all of your brands, and shows them **for Primary, Alt, Equal and Total. Note:** If you apply Filters, these numbers will change accordingly.
25. **DESTINATION CREDITS** – The **Specification Credits Column** shows you the **number of destination credits** each rep firm has in the system listed for all of your brands, and shows them **for Primary, Alt, Equal and Total. Note:** If you apply Filters, these numbers will change accordingly.
26. **ORIGINATION CREDITS** – The **Origination Credits Column** shows you the **number of origination credits** each rep firm has in the system listed for all of your brands, and shows them **for Primary, Alt, Equal and Total. Note:** If you apply Filters, these numbers will change accordingly.
27. **TOTAL COUNTS** – The **Total Counts** row shows the totals for columns 23 – 26 listed above.

Show Reps – Expanded Table

REP	TOTAL CREDITS				SPECIFICATION CREDITS				DESTINATION CREDITS				ORIGINATION CREDITS			
	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL
Reps Inc. (MAFSI HQ Use Only) Test 12 - Southeast Central	30	0	0	30	0	0	0	0	30	0	0	30	29	0	0	29
Non Member 15 - Texas/Oklahoma	33	0	0	33	33	0	0	33	3	0	0	3	4	0	0	4
Non Member 26a - British Columbia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL COUNTS	63	0	0	63	33	0	0	33	33	0	0	33	33	0	0	33
REP	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL
	TOTAL CREDITS				SPECIFICATION CREDITS				DESTINATION CREDITS				ORIGINATION CREDITS			

Reps Inc. (MAFSI HQ Use Only) Test - 12 - Southeast Central

REP	BRAND	SPEC CREDITS	DEST CREDITS	ORIG CREDITS	TOTAL CREDITS
Reps Inc. (MAFSI HQ Use Only) Test	Dummy Brand #2 1	2 0	3 21	4 21	5 21
Reps Inc. (MAFSI HQ Use Only) Test	Dummy Brand #1	0	9	8	9
TOTAL COUNTS		0	30	29	30
REP	BRAND	SPEC CREDITS	DEST CREDITS	ORIG CREDITS	TOTAL CREDITS

Reps Inc. (MAFSI HQ Use Only) Test - 12 - Southeast Central - Dummy Brand #2

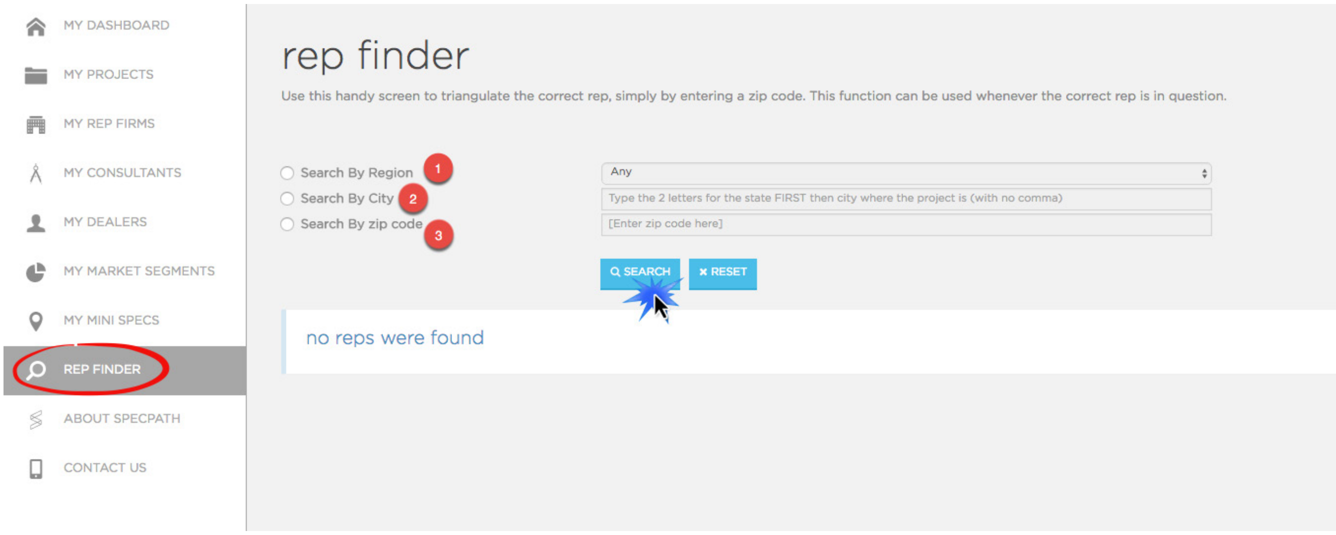
BRAND NAME 6	PROJECT 7	8 UPLOADED	9 AWARDED	10 FILED	11 PAID	12 SPEC CREDITS	13 DEST CREDITS	14 ORIG CREDITS	15 TOTAL CREDITS
Dummy Brand #2	4681 - Test Project #2 - Example Only	08/30/2017	10/10/2017	10/10/2017	10/10/2017	0	21	21	21
TOTAL COUNTS	16	1	1	1	1	0	21	21	21
BRAND NAME	PROJECT	UPLOADED	AWARDED	FILED	PAID	SPEC CREDITS	DEST CREDITS	ORIG CREDITS	TOTAL CREDITS

1. **EXPANDED TABLE BY REP FIRM** - Clicking on the **Rep Firm Name** in the main table will open the Expanded Table, which gives you more detail for the Brand.
2. **SPECIFICATION CREDITS** – The **Specification Credits Column** shows you the **number of specification credits** each rep firm has in the system listed for each of your brands, and shows them **for Primary, Alt, Equal and Total. Note:** If you apply Filters, these numbers will change accordingly.
3. **DESTINATION CREDITS** – The **Specification Credits Column** shows you the **number of destination credits** each rep firm has in the system listed for each of your brands, and shows them **for Primary, Alt, Equal and Total. Note:** If you apply Filters, these numbers will change accordingly.
4. **ORIGINATION CREDITS** – The **Origination Credits Column** shows you the **number of origination credits** each rep firm has in the system listed for each of your brands, and shows them **for Primary, Alt, Equal and Total. Note:** If you apply Filters, these numbers will change accordingly.
5. **TOTAL CREDITS** – The **Total Credits Column** shows you the **total number of credits** each rep firm has in the system listed for each of your brands, and shows them **for Primary, Alt, Equal and Total. Note:** If you apply Filters, these numbers will change accordingly.
6. **BRAND** – The **Brand Column** shows a list of your brands and is sortable by clicking the header.
7. **PROJECT COLUMN** – The **Project Column** shows you the Projects for the Brand, which are sorted by Project Number. Clicking on the **Project Name** will open up the **Individual Project Credit Tracking** page for this project.
8. **UPLOADED COLUMN** – The **Uploaded Column** shows you the Uploaded Date, and is sortable by clicking the header.
9. **AWARDED COLUMN** – The **Awarded Column** shows you the Awarded Date for the Project, and is sortable by clicking the header.

10. **FILED COLUMN** – The **Filed Column** shows you the **Filed Date** for the Project, and is sortable by clicking the header.
11. **PAID COLUMN** – The **Paid Column** shows you the **Paid Date** for the Project, and is sortable by clicking the header.
12. **SPEC CREDITS** – The **Spec Credits Column** shows your number of **Spec Credits** for the Project, and is sortable by clicking the header.
13. **DEST CREDITS** – The **Dest Credits Column** shows your number of **Dest Credits** for the Project, and is sortable by clicking the header.
14. **ORIG CREDITS** – The **Orig Credits Column** shows your number of **Orig Credits** for the Project, and is sortable by clicking the header.
15. **TOTAL CREDITS** – The **Total Credits Column** shows your number of **Total Credits** for the Project, and is sortable by clicking the header.
16. **TOTAL COUNTS** – The **Total Counts** row shows the totals for columns 8 – 15 listed above.

Rep Finder

If you need to find a specific rep associated with a project, this is the page to do it.



You may search for a specific rep in three ways:

1. **By MAFSI Region** – To use this function, select the "Search By Region" option and it will activate the drop down menu next to it. Select the desired MAFSI region, and click SEARCH.

2. **By City** - To use this function, select the "Search By City" option and it will activate the input field. Begin typing the first two letters of the state FIRST, then the city where the project is located. Do not use a comma.

3. **By Zip Code** - To use this function, select the "Search By Zip Code" option and it will activate the input field. Input the desired zip code, and click SEARCH.

TIP: If the correct rep does not appear, you may need to update your MAFSI profile. To do so, please visit https://mafsi.memberclicks.net/manufacturer-profile.

My Account

SpecPath® Email Notifications: You can choose to receive updates from SpecPath.

SpecPath® will keep you notified about your projects every step of the way. Never miss an update on a project again. For example: find out when a dealer is added to a project, when a project has been awarded and more.

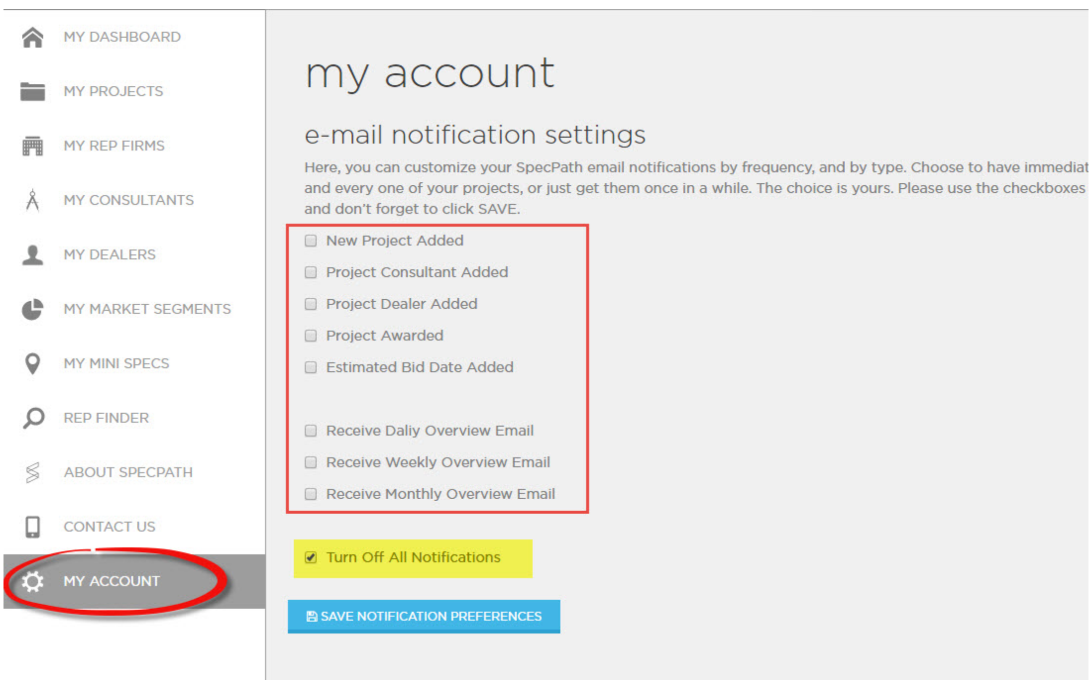
You will have to TURN ON the notifications you would like to receive on your My Account Page in SpecPath®.

Your profile defaults to "Turn Off All Notifications". To turn on the notifications, please go to the My Account Page in SpecPath® and select the emails you wish to receive.

SpecPath® My Account Page

Here you can customize your SpecPath® email notifications by frequency, and by type.

Use the checkboxes on your My Account Page to have immediate notifications about each and every one of your projects, or just get them every once in a while. Remember to click **"SAVE"**. Change your mind about how often you're notified? No problem. You can update your preferences as often as you like.



Immediately
This option will allow you to receive instant notifications.

Daily Overview Email

You will receive an update at the end of each day with a recap of updates relevant to your company.

Weekly Overview Email
A weekly email will be sent to you with a recap of updates relevant to your company.

Monthly Overview Email
You will receive an email monthly with a recap of updates relevant to your company.

SpecPath® Notification Emails: Below are the types email notifications SpecPath® will send to you.

New Project Notification
Notifies you whenever a new project appears on your My Projects page.

Project Consultant Added Notification
Updates you when a consultant has been added to one of your projects.

Project Dealer Added Notification
Alerts you when a new dealer is added to any of your projects.

Project Awarded Notification
Will let you know which dealer the project was awarded to, and when it was awarded.

Estimated Bid Date Added Notification
Informs you when a project has been updated with an estimated bid date.

You will be able to select and manage your email preferences from the **My Account Page.**

REMEMBER TO CLICK SAVE!