



# USER MANUAL FOR MANUFACTURERS

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## SPEC PATH® 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 manufacturer's 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 rep's "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](http://www.specpath.org)

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

The screenshot shows the SpecPath login interface. At the top left is the SpecPath logo, and at the top right is the version number 1.1.0.540. Below the logo is the text "Spec credit tracking starts here. So you can **get there.**". The page is divided into two main sections: "login" on the left and "get specpath®" on the right. The "login" section contains a "username" input field (callout 1), a "password" input field (callout 2), a blue "LOGIN" button (callout 3), and a "Forgot my password" link (callout 4). The "get specpath®" section contains the text "The foodservice industry's FIRST and ONLY 11 40 00 specification tracking software, starts here." and a blue "GET SPECPATH®" button.

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

POWERED BY MAFSI SPECPath IS NORTH AMERICA'S FIRST AND ONLY 11 40 00 SPECIFICATION TRACKING SOFTWARE FOR THE COMMERCIAL FOODSERVICE INDUSTRY

<b>1</b> ABOUT SPECPath MAFSI	<b>2</b> HELPFUL LINKS SUPPORT MAFSI.ORG CONTACT US	<b>3</b> LEGAL LICENSE AGREEMENT PRIVACY POLICY
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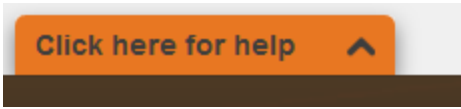
**MAFSI**  
THE MANUFACTURERS' AGENTS ASSOCIATION FOR THE FOODSERVICE INDUSTRY (MAFSI) IS A 67 YEAR-OLD, PROFESSIONAL TRADE ASSOCIATION COMPRISED OF 270+ INDEPENDENT SALES AND MARKETING AGENCIES AND 260+ MANUFACTURERS OF COMMERCIAL FOODSERVICE EQUIPMENT, SUPPLIES, TABLETOP AND FURNISHINGS.

V. 11.0.540

[Click here for help](#) 

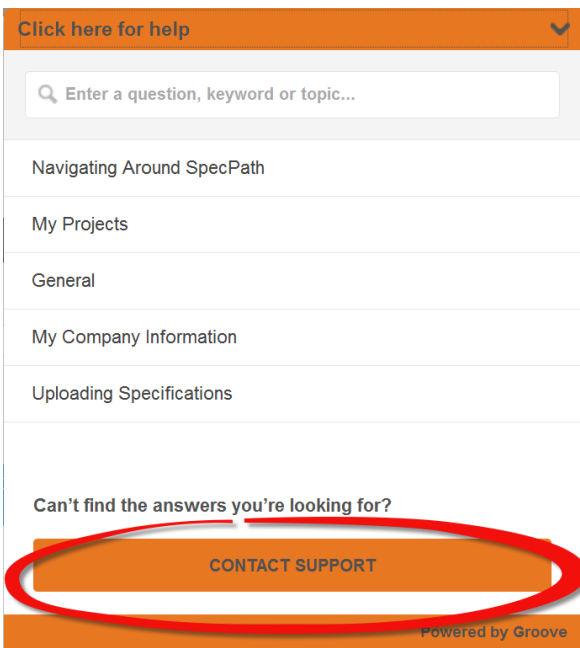
## Help Desk and Contract Administrator

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:

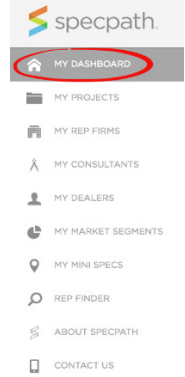
1. Message Subject – Type a short explanation of your need
2. Choose a category from the drop down box to direct your ticket to the proper response team. The choices are a) Question b) Suggestion c) Problem.
3. Message Box - Type the reason for your request for assistance in the message box.
4. Attach 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!

The image shows a screenshot of a web-based help desk form. At the top, there is an orange header bar with a back arrow, the text "Click here for help", and a dropdown arrow. Below the header, a grey box contains the text: "The SpecPath help desk is here for you. Please submit your request and we'll get back to you shortly." The form fields are as follows:
 

- 1**: A text input field labeled "Message Subject".
- 2**: A dropdown menu labeled "Question" with a downward arrow.
- 3**: A large text area labeled "Your Message".
- 4**: A button with a paperclip icon and the text "Attach a File".
- 5**: A text input field containing "Stephanie Key".
- 5**: A text input field containing "skey@mafsi.org".
- 6**: Two buttons at the bottom: "SEND MESSAGE" (orange) and "CANCEL" (grey).

 At the bottom of the form, there is an orange bar with the text "Powered by Groove".

## 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 dashboard

Welcome to SpeckPath®, and the SpeckPath® home screen. On this page, you can see the number of new projects this week, this month, and your total number of projects in SpeckPath®. Remember, only those projects in which one or more of your products appear will be visible.

**my projects** 1.

new projects this week	11
new projects this month	0
all projects	448

**all projects**

new projects this week	32
new projects this month	0
all projects	1700

**My Top 3 Reps** 2.

REP FIRM	# OF PROJECTS
Equipment Preference, Inc. (EPI)	13
W&B Marketing LLC	80
H&L, Inc.	77

**My Top 3 Consultants** 3.

CONSULTANT	# OF PROJECTS
FBI - Foodservice Design Prod. - Houston (H&B)	30
Reps Associates	30
FBI - Foodservice Design Prod. - Dallas (H&B)	24

**My Top 3 Dealers** 4.

DEALER	# OF PROJECTS
K&H Restaurant Supply Co.	35
Supremo Plastics Co., Inc.	32
Stafford Smith, Inc.	24

**My Top 3 Market Segments** 5.

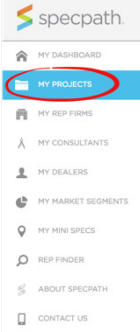
MARKET SEGMENT	# OF PROJECTS
Schools (K-12)	195
Healthcare	99
Business & Industry	35

mafsi region map

MAFSI REGION	SPECK PATH PROJECTS	DISBURMENT PROJECTS	ORDINATION PROJECTS
Region 01 - New England	67	80	56
Region 02 - Florida-FL - W. Pennsylvania	24	22	31
Region 03 - New York Metro	189	125	129
Region 04 - Philadelphia	86	77	105
Region 05 - Mid Atlantic	107	86	47
Region 06 - Michigan/Indiana	65	58	164
Region 07 - Mid America	78	115	106
Region 08 - Carolina	38	39	15
Region 09 - Southeast Central	180	140	126
Region 10 - Florida	69	107	164
Region 11 - South Central	9	17	9
Region 12 - Texas/Oklahoma	234	210	208
Region 13 - Mid Central	51	64	41
Region 14 - Chicago Metro	81	93	97

## 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®.



my projects

For easier sorting, click on a column header to sort projects by category. For example, if you would like to see the projects in a specific city, click on the word PROJECT CITY in the project city column. You may also see projects by type by clicking PRIMARY, ALTERNATIVE, EQUAL, or ALL. For more precise sorting, you can also use the filters below to refine your search BY AWARDED STATE, BY PROJECT REGION, BY MARKET SEGMENT or BY DATES. A search bar is available for finding specific projects by keyword.

REMEMBER: Please be sure to consult the 8:40:00 for accuracy.

PRIMARY ALTERNATIVE EQUAL ALL SHOW ALL PROJECTS SHOW ONLY FAVORITES

search by keyword  
ENTER KEYWORDS SEARCH RESET EXPORT TO CSV

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 ALL

current filters:  
no filters selected  
CHANGE FILTERS CLEAR ALL FILTERS

all my projects: 277 | filtered projects: 277

PROJ ID #	PROJECT NAME	PROJECT STATUS	DATES	PROJ LOCATION	CONSULTANT	DEALERS	#RE ITEMS	ALL ITEMS	EQ ITEMS	YOUR ITEMS	ALL ITEMS
63 upload: 09/07/2016	Project #63 market segment: Schools (K-12) uploaded by: Rep. Firm #393 from region: 07 Mid-Atlantic	Bidding (Not defined)		Monticello, NY, USA - 03 New York Metro - 02 Unassn NY - W. Pennsylvania	Envision Strategies 25 Hartwood - 20 Mountain States North	- Baring Industries - Buffalo Hotel Supply Co. Inc. - F.O. Schaefer Co. Inc. - Kasper's Furniture & Sales Co. - Kasper's Co. Inc. - Southern California	2	1	1	4	11
60 upload: 09/07/2016	Project #60 market segment: Schools (K-12) uploaded by: Rep. Firm #172 from region: 07 Texas/Oklahoma	Bidding 09/16/2016		Supina, OK, USA - 07 Texas/Oklahoma	FDP-FirstService Design Prof - Oklahoma City (Baker) 16 Texas/Oklahoma	- Carls Restaurant Supply - Houston States North - 21 Arizona/New Mexico	1	2	0	3	63
597 upload: 09/07/2016	Project #597 market segment: Schools (K-12) uploaded by: Rep. Firm #143 from region: 22 Mountain States North	Bidding (Not defined)		Santa Ana, CA, USA - 22 Southern California	Diel-Murawski Howe 22 Southern California	- Southwest Design & Supply Co. - Trunk Strategic - Upper Mid Central	1	0	0	1	82
601 upload: 09/07/2016	Project #601 market segment: Schools (K-12) uploaded by: Rep. Firm #325 from region: 18 Upper Mid Central	Bidding 09/09/2016		Chicothee, MD, USA - 18 Mid-Central	Santee Becker Associates LLC 18 Mid-Central	- Trunk Strategic - Upper Mid Central	4	0	0	4	75
337 upload: 09/07/2016	Project #337 market segment: Schools (K-12) uploaded by: Rep. Firm #101 from region: 03 New York Metro	Bidding (Not defined)		Port Chester, NY, USA - 03 New York Metro	Let's Do School Lunch 03 New York Metro	- Single Equipment Co.	1	0	0	1	77

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

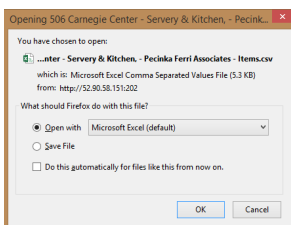
- By the Project Button Ribbon** – To use this function, click on any of the four buttons and it will darken and the results table will return information based on the buttons descriptions:
  - Primary - will show only those projects in which your brand is the primary specification.
  - Alternative - will show only those projects in which your brand is the alternative specification.
  - Equal – will show only those projects in which your brand is the equal specification.
  - All My Projects – will show all projects in which you are specified, regardless of spec type.
- To see only your favorite projects (see item 9), click “SHOW ONLY FAVORITES.”
- 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.
- Click to **reset** all sorting options.
- 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.

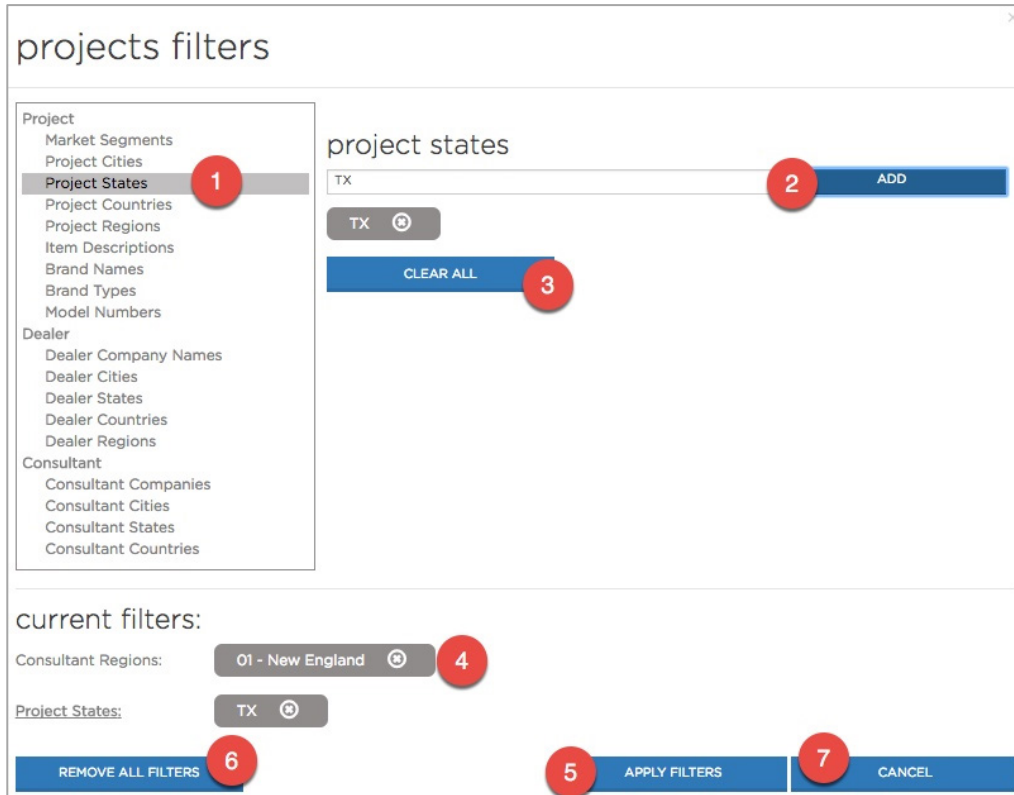
13. **Navigating the Projects Table** - To navigate the results table, you can use the scroll bar on the right side of the table or the paginator located at the bottom of the webpage. You may also sort the table using the up and down arrows located on many of the columns. Clicking on the project name 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

project details: project #209


For easier sorting, click on a column header to sort items by category. For example, if you would like to see the projects sorted by specification type, click on the word TYPE in the column. A search bar is available to narrow results by brand. You can click the RESET button to clear your search.  
 REMINDER: Please be sure to consult the 11:40:00 for accuracy.

Summary 1

PROJECT	PROJECT DETAILS
Project ID #	209
Project Location:	Temecula (CA, United States)
Project Region:	22 - Southern California
Market segment:	Hotel/Motel
Consultant:	Culinary Design and Fixture
Consultant Region:	22 - Southern California
Consultant SIS #:	C196
Estimated Bid Date:	May 17, 2016
Awarded Date:	July 13, 2016 5:02 PM
Upload Date:	May 3, 2016 4:05 PM
Admin's comment:	

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
WV Smith & Co.	Costa Mesa	CA, United States	22 - Southern California	<span>3</span>  awarded
TriMark Raygal Inc.	Irvine	CA, United States	22 - Southern California	<span>4</span> <a href="#">ADD MY DEALER</a>

search by brand

ENTER BRAND  5 [Q SEARCH](#) 6 [VIEW MINI SPEC](#) 8 [RESET](#) 9 [EXPORT TO CSV](#)

ITEM #	BRAND	TYPE	DESCRIPTION	MODEL #	QUANTITY	SPEC REP	DEST REP	ORIG REP
BP009	Brand #294	Primary	Mobile Shelving Section	Custom	1	- 22 - Rep firm #966	- 22 - Rep firm #966	- 22 - Rep firm #966
LR036	Brand #294	Primary	Security Shelving	SECSGLC	2	- 22 - Rep firm #966	- 22 - Rep firm #966	- 22 - Rep firm #966
BP001	Brand #294	Primary	Shelving Section	Custom	3	- 22 - Rep firm #966	- 22 - Rep firm #966	- 22 - Rep firm #966
BK009	Brand #294	Primary	Shelving Section	CUSTOM	14	- 22 - Rep firm #966	- 22 - Rep firm #966	- 22 - Rep firm #966
LR007	Brand #294	Primary	Shelving Section	Custom	22	- 22 - Rep firm #966	- 22 - Rep firm #966	- 22 - Rep firm #966
LR006	Brand #294	Primary	Shelving Section	Custom	17	- 22 - Rep firm #966	- 22 - Rep firm #966	- 22 - Rep firm #966
RK004	Brand #294	Primary	Shelving Section	Custom	12	- 22 - Rep firm #966	- 22 - Rep firm #966	- 22 - Rep firm #966
RK060	Brand #294	Primary	Shelving Section	Custom	25	- 22 - Rep firm #966	- 22 - Rep firm #966	- 22 - Rep firm #966
BK007	Brand #294	Primary	Shelving Section	CUSTOM	23	- 22 - Rep firm #966	- 22 - Rep firm #966	- 22 - Rep firm #966
BP002	Brand #294	Primary	Top Rack High Density Storage System	Custom	QRP	- 22 - Rep firm #966	- 22 - Rep firm #966	- 22 - Rep firm #966

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 # <b>1</b>	229
Project Location: <b>2</b>	New York (NY, United States)
Project Region: <b>3</b>	03 - New York Metro
Market segment: <b>4</b>	Business & Industry
Consultant: <b>5</b>	Jacobs Doland Beer
Consultant Region: <b>6</b>	03 - New York Metro
Consultant SIS #: <b>7</b>	[Undefined]
Estimated Bid Date: <b>8</b>	<input type="text"/> <b>x</b>
Awarded Date: <b>9</b>	[Undefined]
Upload Date: <b>10</b>	May 10, 2016 3:54 PM

- Project ID** – the unique identifier number assigned to the specification by SpecPath®.
- Project Location** – the location where the project is located.
- Project Region** – the MAFSI region in which the project is located.
- Market Segment** – the market segment that best represents this project.
- Consultant** – the consultant that wrote the specification. If it is empty, and you know the consultant, please add them to the project.
- Consultant Region** – the region where the consultant is located.
- Consultant SIS#** - the SIS# for the consultant (if known).
- 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.
- Awarded Date** – the date the project is awarded. This field will auto populate when a dealer is awarded the project.
- 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) **2**

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.

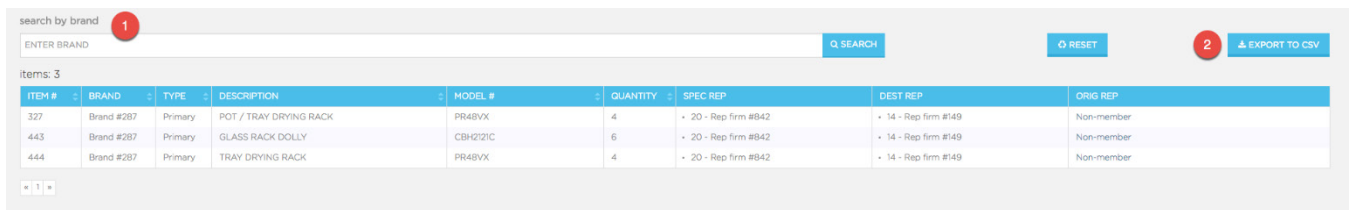
DEALER	CITY	STATE, COUNTRY	REGION	AWARDED
Adams Burch Inc.	Landover	MD, United States	05 - Mid-Atlantic	<input type="checkbox"/>
Atlanta Fixture & Sales Co.	Atlanta	GA, United States	12 - Southeast Central	<input type="checkbox"/>
Kirby Restaurant Supply Co.	Longview	TX, United States	15 - Texas/Oklahoma	<input type="checkbox"/> <b>1</b>
Oswalt Restaurant Supply	Oklahoma City	OK, United States	15 - Texas/Oklahoma	<input type="checkbox"/>
Supreme Fixture Co. Inc.	Dallas	TX, United States	15 - Texas/Oklahoma	<input type="checkbox"/>



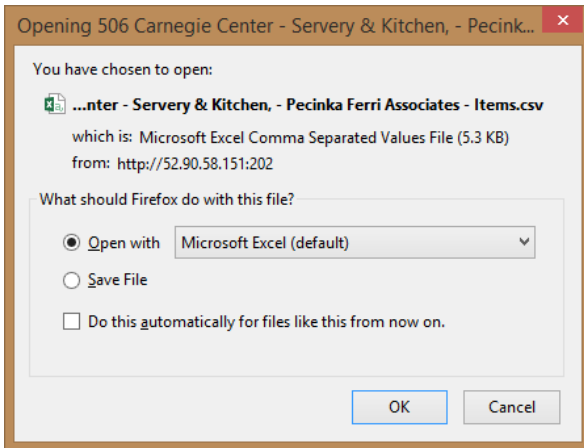
### Navigating the Project Items Section

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.

PROJ ID #	PROJECT NAME	PROJECT STATUS	PROJ LOCATION	CONSULTANT	DEALERS	SPEC ITEMS	DEST ITEMS	ORIG ITEMS	TOTAL ITEMS	ALL ITEMS
5025 uploaded: 09/27/2017	Atlanta Hawks Basketball Club - Phillips Arena - Updated  market segment: Casino/Gaming uploaded by: Rep Firm from region: 12 Southeast Central	Bidding: 09/29/2017	Atlanta, GA, USA - 12 - Southeast Central	S2O Consultants Inc. 17 - Chicago Metro	- Boelter Direct South (Citisco Inc) 12 - Southeast Central - Atlanta Fixture & Sales Co. 12 - Southeast Central	0	4	4	4	928

- 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.

add dealer to project

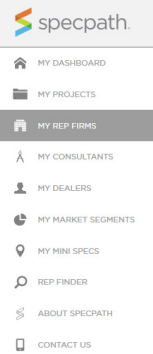
Start typing dealer name:

A	<b>+ ADD</b>	<b>CLOSE</b>
<b>A &amp; E Wholesale N FL, LLC</b> 32304 Tallahassee (FL), United States		
<b>A &amp; N Restaurant Equipment</b> 44481 Warren (OH), United States		
<b>A City Discount</b> 30093 Norcross (GA), United States		
<b>A to Z Refrigeration</b> 53105 Burlington (WI), United States		
<b>A to Z Restaurant Equipment</b> 55371 Princeton (MN), United States		

- 2. AWARD DEALER BUTTON** – The **Award 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.

award dealer

DEALER	REGION	
Birmingham Restaurant Supply Inc. (BRESKO)	12 - Southeast Central	<b>Award</b>
Trimark Century Concepts	12 - Southeast Central	<b>Award</b>



## 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.

my rep firms

This screen gives you a snapshot of the specification performance of your reps. Sorted by rep firm, they are tallied by specification, destination, origination, and totals of all three. They can be sorted by items or projects. You can also export this data using the “EXPORT TO CSV” button on the right.

SHOW ITEMS SHOW PROJECTS 1

ABCDEF GHIJKL MNO PQRST UVWXYZ 0123456789 ALL 2

5 EXPORT TO CSV

REP FIRM	REGION	TOTAL ITEMS				SPECIFICATION ITEMS				DESTINATION ITEMS				ORIGINATION ITEMS			
		PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL
Non member	02-Uppstate NY - W. Pennsylvania	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Non member	21-Arizona/New Mexico	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rep firm #1030 (S)	12-Southeast Central	302	31	40	373	42	10	7	59	97	10	15	122	183	11	18	192
Rep firm #182 (S)	14-South Central	16	0	2	18	10	0	2	12	6	0	0	6	0	0	0	0
Rep firm #173 (S)	06-Michigan/Indiana	80	6	15	101	44	0	15	59	18	3	0	21	18	3	0	21
Rep firm #227 (S)	26a-British Columbia	338	12	30	380	14	4	10	128	115	4	10	129	109	4	10	123
Rep firm #227 (S)	26d-Ontario/Ottawa	338	12	30	380	14	4	10	128	115	4	10	129	109	4	10	123
Rep firm #227 (S)	26c-Manitoba/Saskatchewan/Lakehead	338	12	30	380	14	4	10	128	115	4	10	129	109	4	10	123
Rep firm #227 (S)	26f-Atlantic	338	12	30	380	14	4	10	128	115	4	10	129	109	4	10	123
Rep firm #227 (S)	26e-Quebec/Ottawa	338	12	30	380	14	4	10	128	115	4	10	129	109	4	10	123

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)	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 #939 (S)	25-Northwest	72	1	2	75	40	1	1	42	22	0	1	23	10	0	0	10
Rep firm #940 (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	18	1	1	100
TOTAL COUNTS		6961	342	492	7815	2290	108	173	2571	2363	115	168	2646	2328	119	161	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.

- MY DASHBOARD
- MY PROJECTS
- MY REP FIRMS
- MY CONSULTANTS**
- MY DEALERS
- MY MARKET SEGMENTS
- MY MINI SPECS
- REP FINDER
- ABOUT SPECPATH
- CONTACT US

**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.

# SPECPATH USER MANUAL

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	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 SaleyWorks Inc.	Langley	BC	26a-British Columbia	Rep firm #227	0	0	0		
Grant Thomson	Victoria	BC	26a-British Columbia	Rep firm #227	0	0	0		
Joby 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		
Norma Management Inc.	Burnaby	BC	26a-British Columbia	Rep firm #227	0	0	0		
PATRIN 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			

- 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



- [MY DASHBOARD](#)
- [MY PROJECTS](#)
- [MY REP FIRMS](#)
- [MY CONSULTANTS](#)
- [MY DEALERS](#)
- [MY MARKET SEGMENTS](#)
- [MY MINI SPECS](#)
- [REP FINDER](#)
- [ABOUT SPEC PATH](#)
- [CONTACT US](#)

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.

my dealers

This screen enables you to see originations specs by dealers within a given region, and can be sorted by items, or by projects. To see the full detail of the dealer activity in a given region, simply click on that region and the details will display at the bottom of the page. To see only the Dealers with items/projects activity in your region, please mark the checkbox below.

1 SHOW ITEMS    2 SHOW PROJECTS    3 Show only dealers with items/projects activity    7 EXPORT TO CSV

Dealer Name:  Q SEARCH

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 Alt

DEALER REGION	REP FIRM	TOTAL ITEMS				TOTAL
		PRIMARY	ALT	EQUAL	TOTAL	
01-New England	Rep firm #712 (S)	552	16	8	576	
02-Upstate NY - W. Pennsylvania	Non-member	6	1	1	8	
03-New York Metro	Rep firm #757 (S)	94	28	2	124	
04-Charlotte	Rep firm #811 (S)	62	1	30	93	
05-Mid-Atlantic	Rep firm #887 (S)	54	8	0	62	
06-Michigan/Indiana	Rep firm #775 (S)	32	3	0	35	
07-Mid-America	Rep firm #305 (S)	100	4	2	106	
08-Central	Rep firm #883 (S)	47	22	5	74	
09-Southeast Central	Rep firm #703 (S)	205	27	18	250	
10-Florida	Rep firm #714 (S)	264	6	2	272	
11-South Central	Rep firm #752 (S)	0	0	0	0	
12-Texas/Oklahoma	Rep firm #762 (S)	763	36	23	842	
13-Mid-Central	Rep firm #864 (S)	0	0	0	0	
14-Chicago Metro	Rep firm #432 (S)	7	1	2	10	
15-Wisconsin/Upper Michigan	Rep firm #776 (S)	5	1	2	8	
16-Upper Mid-Central	Rep firm #563 (S)	102	0	63	165	
17-Mountain States North	Rep firm #840 (S)	42	0	1	43	

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

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.

17-Chicago Metro - TriMark Marine Restaurant Supply Co.

BRAND	REGION	REP FIRM	TOTAL ITEMS			
			PRIMARY	ALT	EQUAL	TOTAL
Brand #254	17-Chicago Metro	Rep firm #432 (3)	2	0	0	2
TOTAL COUNTS			2	0	0	2

17-Chicago Metro - TriMark Marine Restaurant Supply Co. - Brand #254

PROJECT	ITEM	REGION	REP FIRM	TOTAL ITEMS			
				PRIMARY	ALT	EQUAL	TOTAL
Project #258	Plastic Drinking Unit, Mobile	17-Chicago Metro	Rep firm #432 (3)	2	0	0	2
TOTAL COUNTS			2	0	0	2	

- 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.

- MY DASHBOARD
- MY PROJECTS
- MY REP FIRMS
- MY CONSULTANTS
- MY DEALERS
- MY MARKET SEGMENTS**
- MY MINI SPECS
- REP FINDER
- ABOUT SPECPATH
- CONTACT US

my market segments

This screen enables you to track specific specifications types by market segment, and can be sorted by items, or by projects. If a market segment does not contain data, it indicates you have no current projects in that market segment. You can also export this table by using the “EXPORT TO CSV” button on the right. To see only the Market Segments with item/projects activity in your region, please mark the checkbox below.

1 SHOW ITEMS    2 SHOW PROJECTS    3 Show only Market Segments with item/project activity    5 EXPORT TO CSV

MARKET SEGMENT	TOTAL ITEMS				SPECIFICATION ITEMS				DESTINATION ITEMS				ORIGINATOR ITEMS			
	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL	PRIMARY	ALT	EQUAL	TOTAL
Bar/ Tavern	12	0	0	12	4	0	0	4	4	0	0	4	4	0	0	4
Business & Industry	667	21	30	718	251	7	10	268	249	7	10	266	167	7	10	184
Casino/Gaming	656	0	20	676	221	0	9	230	221	0	9	230	214	0	2	216
College/University	314	33	38	385	94	8	5	107	93	8	13	114	93	8	13	114
Convenience Store	3	0	0	3	1	0	0	1	1	0	0	1	1	0	0	1
Convention Center	31	0	0	31	12	0	0	12	12	0	0	12	7	0	0	7
Connections	75	0	0	75	25	0	0	25	25	0	0	25	25	0	0	25
Country Club	149	3	0	152	30	1	0	31	30	1	0	31	49	1	0	50
Cruise Ship	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Fine Dining	12	0	0	12	4	0	0	4	4	0	0	4	4	0	0	4
Healthcare	548	12	9	569	184	4	3	191	184	4	3	191	180	4	3	187
Hotel/Hotel	486	0	44	530	191	0	22	213	191	0	22	213	104	0	0	104
Military	15	0	0	15	5	0	0	5	5	0	0	5	5	0	0	5
Religious/Church	39	3	9	51	13	1	3	17	13	1	3	17	13	1	3	17
Restaurant	203	3	0	206	68	1	0	69	68	1	0	69	67	1	0	68
Schools (K-12)	1338	177	365	1880	449	39	55	543	480	39	55	574	429	39	55	543
Sport Venue	265	9	0	274	90	3	0	93	90	3	0	93	85	3	0	88
Supermarket	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Theme Park	1	0	0	1	1	0	0	1	1	0	0	1	1	0	0	1
TOTAL COUNT	4316	201	308	5385	1641	87	107	1835	1638	87	105	1830	1465	87	96	1638

**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 #224	3	0	0	3	
TOTAL COUNTS	3	0	0	3	

BRAND NAME	PROJECT	PRIMARY ITEMS	ALT ITEMS	EQUAL ITEMS	TOTAL ITEMS
Brand #234	Project #308	3	0	0	3
TOTAL COUNTS		3	0	0	3

- 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.

my mini specs

Use this screen to compile a mini-spec (AKA a “take off.”) For instance, if you need to get a rundown of your specific items within a project, you can do that here. Simply click on the PROJECT NAME for the project details. You may also click on MINI SPEC, or on the CSV link under EXPORT.

REMINDER: Please be sure to consult the T-40 CO for accuracy.

PRIMARY ALTERNATIVE EQUAL ALL 1

2 BY AWARDED STATE - BY PROJECT REGION - BY MARKET SEGMENT - BY CONSULTANT - BY DEALER - 3 APPLY FILTERS

4 search by keyword

5 ALL

6 DATES: All Date Day

7 SEARCH RESET

all my projects: 277 | filtered projects: 277

PROJECT #	PROJECT NAME	PROJECT STATUS	PRJG LOCATION	CONSULTANT	DEALERS	NUMBER OF ITEMS	EXPORT
487 uploaded 07/04/2016 ★	Project #487 market segment: Hotel/Hotel uploaded by Rep firm #183 from region: 07 Mid-America	Awarded January 23, 2008	Savannah, GA, USA - 12 Southeast Central	FoodStrategy, Inc. 06 Mid-Atlantic	- Brockmeyer Kitchen Equipment & Design 07 Mid-America	16	CSV minispec
388 uploaded 07/04/2016 ★	Project #388 market segment: College/University uploaded by Rep firm #458 from region: 22 Southern California	Awarded Invalid date	San Berneritos, CA, USA - 22 Southern California	Webb Design 22 Southern California	- RW Smith & Co. 22 Southern California	7	CSV minispec
209 uploaded 07/08/2016 ★	Project #209 market segment: Hotel/Hotel uploaded by Rep firm #979 from region: 22 Southern California	Awarded Invalid date	Temecua, CA, USA - 22 Southern California	Culinary Design and Future 22 Southern California	- RW Smith & Co. 22 Southern California	10	CSV minispec
308 uploaded 07/11/2016 ★	Project #308 market segment: Healthcare uploaded by Rep firm #979 from region: 22 Southern California	Bidding March 23, 2004	Clovis, CA, USA - 24 San Francisco Metro	Design Development Co. 22 Southern California	- RW Smith & Co. 22 Southern California	7	CSV minispec
565 uploaded 08/05/2016 ★	Project #565 market segment: Schools (K-12) uploaded by Rep firm #979 from region: 22 Southern California	Bidding Invalid date	Moreno Valley, CA, USA - 22 Southern California	Diall Murawski Howe 22 Southern California	- RW Smith & Co. 22 Southern California	4	CSV minispec
604 uploaded 08/03/2016 ★	Project #604 market segment: Schools (K-12) uploaded by Rep firm #131 from region: 01 New England	Bidding Invalid date	Coxhaster, CT, USA - 01 New England	Foodservice Design Collaborative 01 New England	- Paramount Restaurant Supply 01 New England	2	CSV minispec
547 uploaded 08/02/2016 ★	Project #547 market segment: Healthcare uploaded by Rep firm #950 from region: 04 Northeast	Bidding Invalid date	Basking Ridge, NJ, USA - 03 New York Metro	Cori Associates LLC 04 Northeast	- New Dealer 04 Northeast	19	CSV minispec
539 uploaded 08/02/2016 ★	Project #539 market segment: Corrections uploaded by Rep firm #30 from region: 24 San Francisco Metro	Bidding Invalid date	Visalia, CA, USA - 24 San Francisco Metro	Capital Engineering Consultants Inc. 24 San Francisco Metro	- East Bay Restaurant Supply 24 San Francisco Metro	9	CSV minispec
610 uploaded 08/02/2016 ★	Project #610 market segment: Schools (K-12) uploaded by Rep firm #773 from region: 15 Texas/Oklahoma	Bidding Invalid date	Suburb, OK, USA - 15 Texas/Oklahoma	FDP-Foodservice Design Prof - Oklahoma City (Basco)	- Curly's Restaurant Supply 15 Texas/Oklahoma	3	CSV minispec

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

project details: project #209

For easier sorting, click on a column header to sort items by category. For example, if you would like to see the projects sorted by specification type, click on the word TYPE in the column. A search bar is available to narrow results by brand. You can click the RESET button to clear your search.  
 REMINDER: Please be sure to consult the 11:40:00 for accuracy.

summary

PROJECT	PROJECT DETAILS
Project ID #	209
Project Location:	Temecula (CA, United States)
Project Region:	22 - Southern California
Market segment:	Hotels/Motel
Consultant:	Culinary Design and Fixture
Consultant Region:	22 - Southern California
Consultant SIS #:	C196
Estimated Bid Date:	May 11, 2016
Awarded Date:	July 13, 2016 5:02 PM
Updated Date:	May 3, 2016 4:05 PM
Admin's comment:	

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
R.W. Smith & Co.	Costa Mesa	CA, United States	22 - Southern California	<input type="checkbox"/>
TriMark Raygal Inc.	Irvine	CA, United States	22 - Southern California	<input checked="" type="checkbox"/>

search by brand

ENTER BRAND

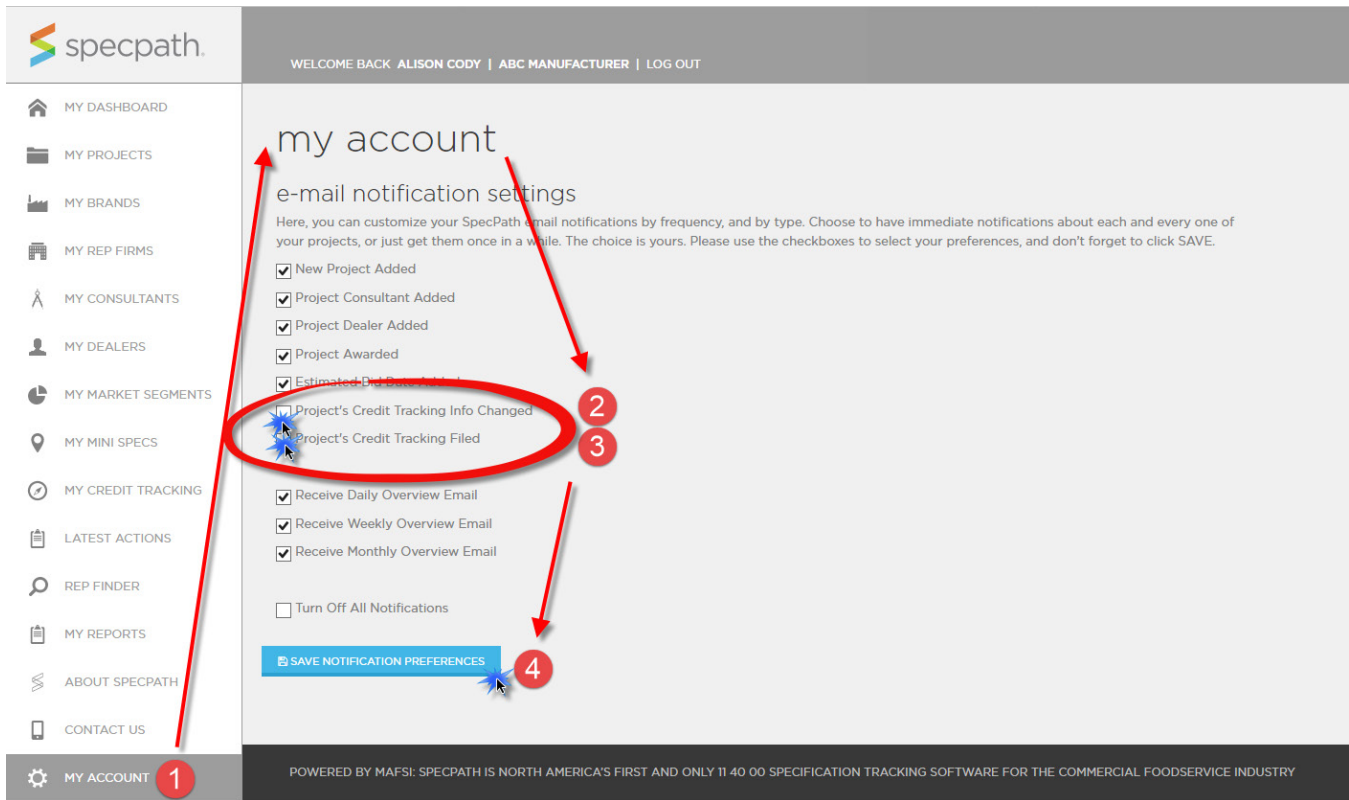
ITEM #	BRAND	TYPE	DESCRIPTION	MODEL #	QUANTITY	RAW TEXT
BP009	Brand #254	Primary	Mobile Shelving Section	Custom	1	Item # BP009 Mobile Shelving Section Quantity: One (1) Manufacturer: Metro 1. Per manufacturers standard specifications 2. Each shelving section consists of 5 each shelves and 4 each posts 3. Five (5) Model 2448NC Super Erecta® Shelf, wire, 48"W x 24"D, chrome-plated finish, plastic split sleeves are included in each carton, NSF 4. Four (4) Model 761JP Super Erecta® Post, 7/8" for use with stem casters, chrome plated finish 5. Two (2) Model 04 Super Erecta® Stem Caster swivel, 5" diameter, 1-1/4" face, resilient wheel tread, 200 lb. capacity 6. Two (2) Model 5MB Super Erecta® Stem Caster, brake (foot operated), 5" diameter, 1-1/4" face, resilient wheel tread, 200 lb. capacity, brakes are foot operated
LR036	Brand #254	Primary	Security Shelving	SEC5SLC	2	Item # LR036 Security Shelving Quantity: Two (2) Manufacturer: Metro Model: SEC5SLC 1. Super Erecta® Security Unit, mobile, 50-1/2"W x 28-1/8"D x 68-1/2"H, (2) doors open 270° & secure to sides, no intermediate shelves, aluminum dolly with wrap-around bumper includes (2) SPB & (2) BSPD casters, chrome-plated finish, ships KD 2. Six (6) Model 2448NC Super Erecta® Shelf, wire, 48"W x 24"D, chrome-plated finish, plastic split sleeves are included in each carton, NSF
BP001	Brand #254	Primary	Shelving Section	Custom	3	Item # BP001 Shelving Section Quantity: Three (3) Manufacturer: Metro 1. Per manufacturers standard specifications 2. Each shelving section consists of 5 each shelves and 4 each posts 3. Five (3) Model 2442NC Super Erecta® Shelf, wire, 42"W x 24"D, chrome-plated finish, plastic split sleeves are included in each carton, NSF 4. Ten (10) Model 2448NC Super Erecta® Shelf, wire, 48"W x 24"D, chrome-plated finish, plastic split sleeves are included in each carton, NSF 5. Twelve (12) Model 86P Super Erecta® Stabilizer™ Post, 86-5/8"H, adjustable leveling bolt, posts are grooved at 2" increments & numbered at 1" increments, double grooved every 8", chrome finish

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.

WELCOME BACK ALISON ODDY | ABC MANUFACTURER | LOG OUT

POWERED BY MAFSI

my credit tracking: filed/paid overview

This screen enables you to track your filed and paid projects.  
Please enter the email(s) of the factory personnel that should receive your credit request forms from your reps.  
To see project by rep firm please click the appropriate on the rep firm name.  
You can export this data using the EXPORT TO CSV or EXPORT TO PDF buttons on the right.

SHOW FILED/PAID SHOW PROJECTS SHOW REPS

EXPORT TO CSV EXPORT TO PDF

BRAND	REP	FACTORY EMAIL(S) FOR CREDIT REPORTS <small>enter email in box, separated by comma with no space</small>	NUMBER OF PROJECTS	FILED	UNFILED	PAID COUNT	UNPAID COUNT
Dummy Brand #2	Reps Inc. (MAFSI HQ Use Only) Test 12 - Southeast Central	<input type="text"/> last edit: -	1	0	1	0	1
Dummy Brand #2	Non Member 15 - Texas/Oklahoma	<input type="text"/> last edit: -	0	0	0	0	0

Show Filed/Paid

my credit tracking: filed/paid overview

This screen enables you to track your filed and paid projects.  
 Please enter the email(s) of the factory personnel that should receive your credit request forms from your reps.  
 To see project by rep firm please click the appropriate on the rep firm name.  
 You can export this data using the EXPORT TO CSV or EXPORT TO PDF buttons on the right.

SHOW FILED/PAID    SHOW PROJECTS    SHOW REPS

EXPORT TO CSV    EXPORT TO PDF

BRAND	REP	FACTORY EMAIL(S) FOR CREDIT REPORTS <small>enter email in box, separated by comma with no space</small>	NUMBER OF PROJECTS	FILED	UNFILED	PAID COUNT	UNPAID COUNT
Dummy Brand #2	Reps Inc. (MAFSI HQ Use Only) Test 12 - Southeast Central	<input type="text" value=""/>	1	0	1	0	1
Dummy Brand #2	Non Member 15 - Texas/Oklahoma	<input type="text" value=""/>	0	0	0	0	0

- BRANDS** – The **Brand Column** lists your brands, and is sortable, if you have more than one brand.
- 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.
- 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.

- 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.
- FILED** - This column lists the number of **Filed Projects** for each of your rep firms by brand, and is sortable.
- UNFILED** - This column lists the number of **Unfiled Projects** for each of your rep firms by brand, and is sortable.
- PAID COUNT** - This column lists the number of **Paid Projects** for each of your rep firms by brand, and is sortable.
- UNPAID COUNT** - This column lists the number of **Unpaid Projects** for each of your rep firms by brand, and is sortable.
- EXPORT TO CSV** – This button exports the **Show Filed/Paid** table to a **CSV file**.
- 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.

my credit tracking: projects overview

This screen enables you to track your projects' specification, destination and origination credits in an overview format. To see project details, please click View All in the project row. You can export this data using the EXPORT TO CSV or EXPORT TO PDF buttons on the right.

SHOW FILED/PAID **SHOW PROJECTS** SHOW REPS

search by keyword  
 ENTER KEYWORDS

current filters:  
 no filters selected

CHANGE FILTERS CLEAR ALL FILTERS FILTERS PRESETS

additional filters:  
 NEWEST FIRST OLDEST FIRST AWARDED STATE

TIME PERIOD PAID STATUS FILED STATUS REP FIRMS BRAND

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 ALL

all my projects: 3 | filtered projects: 3 DATES: All Date Day

BRAND	PROJ #	PROJECT	PROJECT STATUS	PROJECT DETAILS/PAYMENT STATUS	ITEMS	SPEC REP	DEST REP	ORIG REP
Dummy Brand #2	4792 uploaded: 09/11/2017	Test Project #5 - Admin Use Only credit filed: -	Bidding: 12/31/0000	location: Columbia, SC, United States - 11 - Carolinas market segment: Healthcare consultant: Camacho Associates Inc. - 11 - Carolinas dealer(s): - TriMark Foodcraft - 11 - Carolinas add award	3	Non Member 11 - Carolinas VIEW CREDITS PAID N/A last edit: -	Non Member 11 - Carolinas VIEW CREDITS PAID N/A last edit: -	Non Member 11 - Carolinas VIEW CREDITS PAID N/A last edit: -

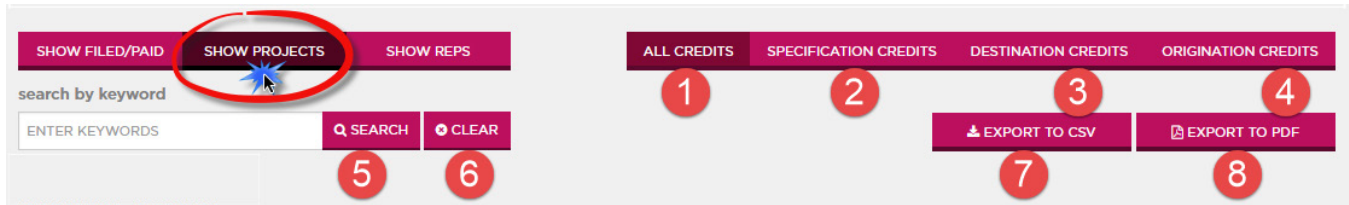
payment status:  
 Global: POB ACKR INVR PAID  
 Myr: POB ACKR INVR PAID  
 POB:

last edit: -  
 ACKR:

last edit: -  
 INVR:

last edit: -

## Show Projects – Buttons – Top of Page

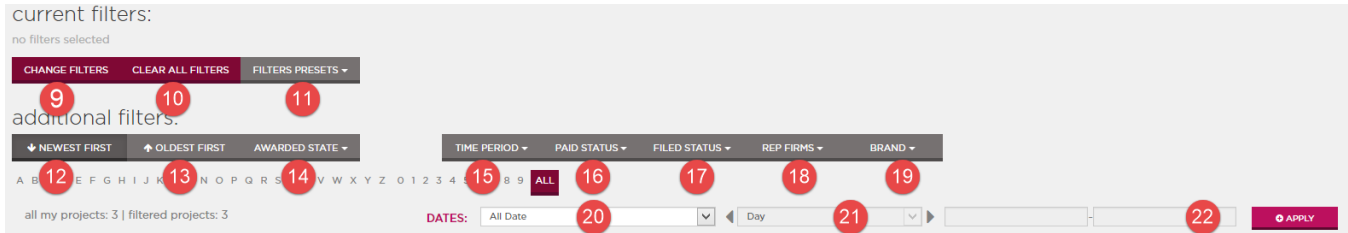


1. **ALL CREDITS** - This button will show you all your projects where your rep firms are eligible for one (or a combination) of the following credits: Specification, Destination and/or Origination.
2. **SPECIFICATION CREDITS** – Clicking this button will show you all your projects where your rep firms 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.

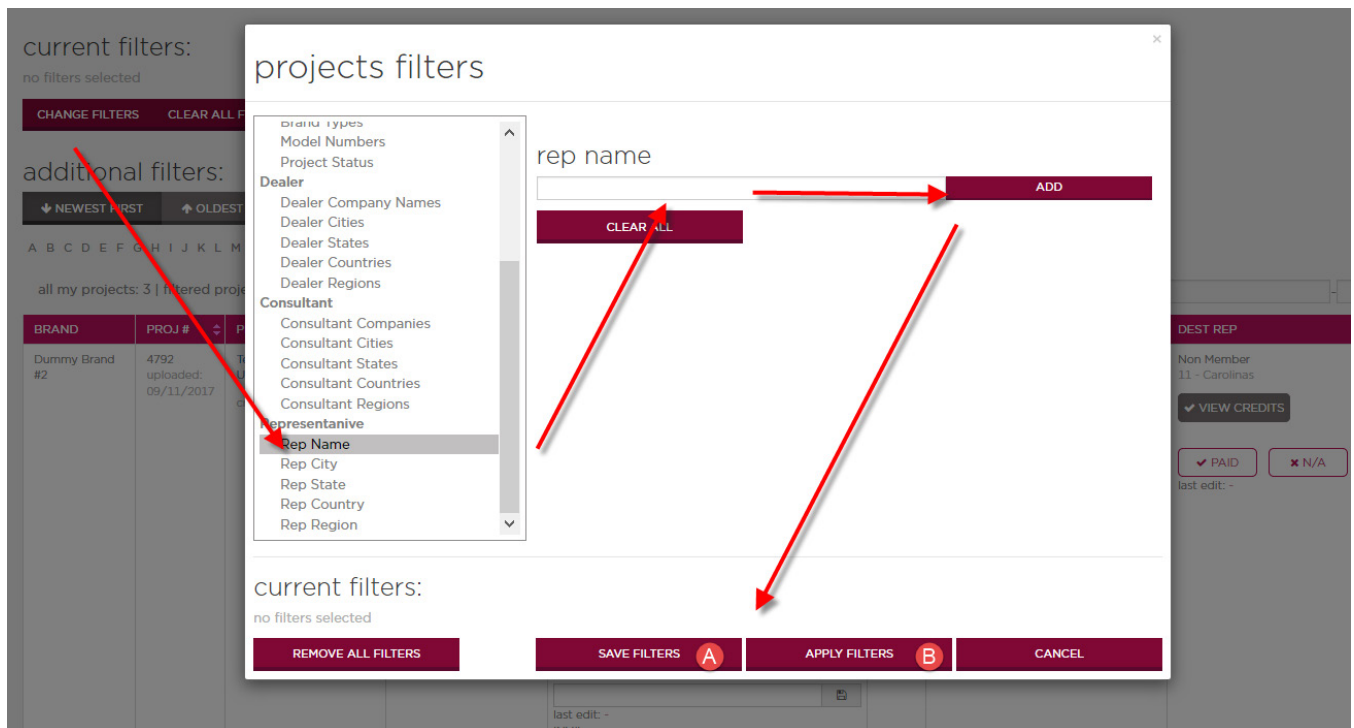
**NOTE:** This keyword search DOES NOT work on brand. Please use the BRAND drop down filter (#19) to perform a brand search.

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



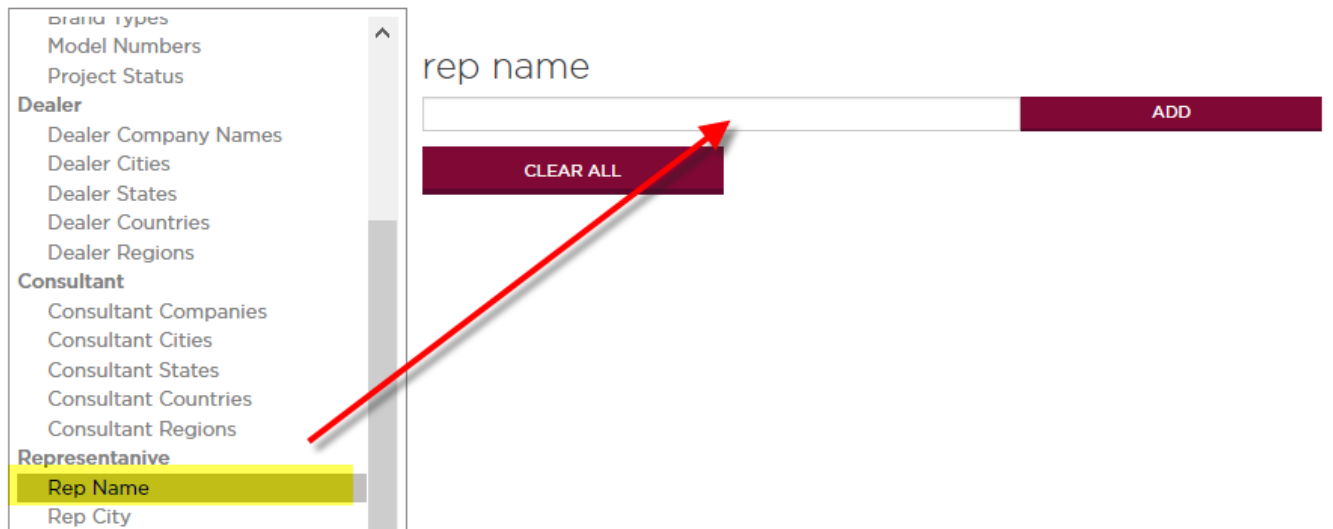
9. **CHANGE FILTERS** - These **Filters** narrow the projects in the search results in the Show Projects table. For instance, to build a filter for a few of your rep groups combined, Click the Change Filters button and follow the arrows below. Don't forget to click the "Add" button after each selection.
  - 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.

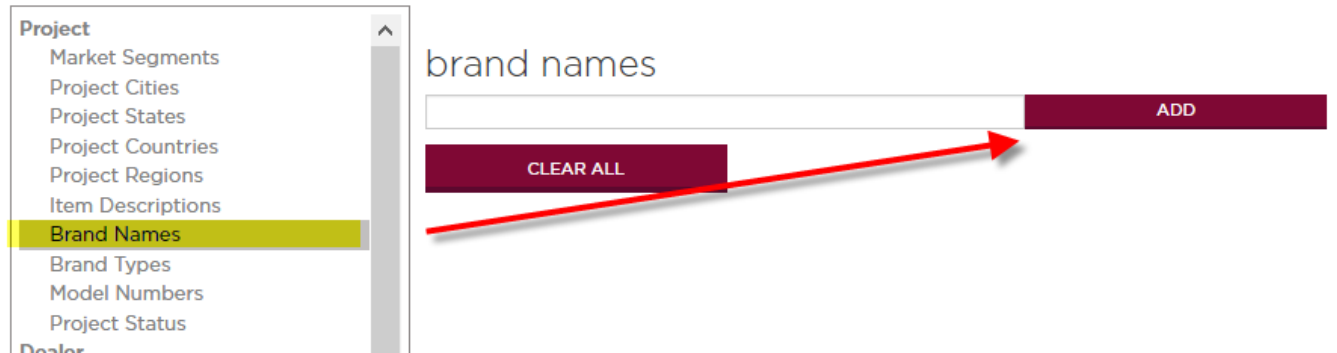
12. **NEWEST FIRST** - The **Newest First Filter** sorts the projects in the search results with the newest project on top in the Show Projects table. Default sort order is Project Number, which is usually in line with the newest to oldest project dates, but this option exists, just in case.
13. **OLDEST 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.*

## projects filters



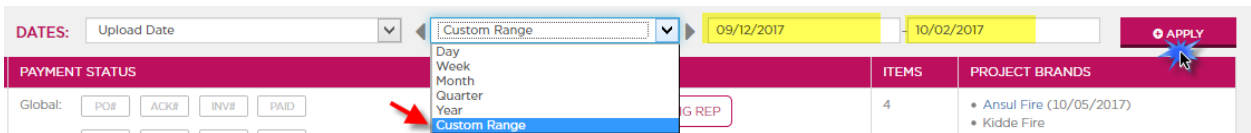
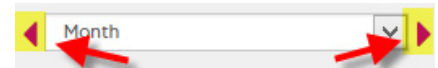
19. **BRAND** – The **Brand Filter** is a quick way to drill down to projects for one of your brands. Quick filter choices include **all your brands and each brand separately (if applicable)**. **Note:** *If you would like to build a filter for more than one of your Brands, please use Change Filters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

## projects filters



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

BRAND	PROJ #	PROJECT	PROJECT STATUS	PROJECT DETAILS/PAYMENT STATUS	ITEMS	SPEC REP	DEST REP	ORIG REP
Dummy Brand #2	4792 uploaded: 09/11/2017	Test Project #5 - Admin Use Only credit filed: -	Bidding: 12/31/0000	location: Columbia, SC, United States - 11 - Carolinas market segment: Healthcare consultant: Camacho Associates Inc. - 11 - Carolinas dealer(s): - TriMark Foodcraft 11 - Carolinas add award payment status: Global: PO# ACK# INV# PAD My: PO# ACK# INV# PAD PO#: last edit: - ACK#: last edit: - INV#: last edit: -	3	Non Member 11 - Carolinas VIEW CREDITS PAID N/A last edit: -	Non Member 11 - Carolinas VIEW CREDITS PAID N/A last edit: -	Non Member 11 - Carolinas VIEW CREDITS PAID N/A last edit: -

- 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.

Test Project #2 - Example Only  
credit filed: 10/10/2017

**PROJECT STATUS**  
Bidding: 04/18/2017  
Awarded: 04/21/2017  
Closed: 10/08/2017

**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** 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.**

dealer(s):  
- TriMark Foodcraft  
11 - Carolinas  
add award

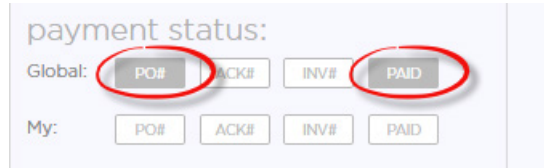
add dealer to project

Start typing dealer name:

A
<b>A &amp; E Wholesale N FL, LLC</b> 32304 Tallahassee (FL), United States
A & N Restaurant Equipment 44481 Warren (OH), United States
A City Discount 30093 Norcross (GA), United States
A to Z Refrigeration 53105 Burlington (WI), United States
A to Z Restaurant Equipment 55371 Princeton (MN), United States

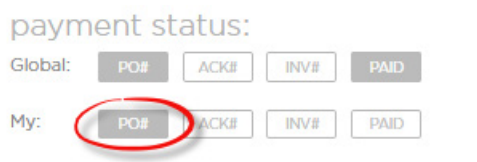
+ ADD CLOSE

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 buttons** 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.

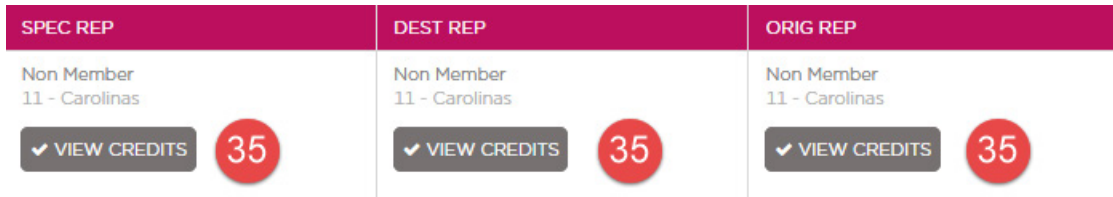


**Why are My Payment Boxes Important?** These boxes are important because they let your company stay on top of the payment status of the project. E.g. If one or your reps enters a PO# for this project, you will be able to see activity on this project. Therefore, if the rep in the origination position 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](#).



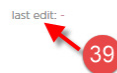
35. **SPEC REP PAID-N/A** – The **Spec Rep Column** allows you to see the spec rep on the project while the Paid and N/A buttons allow you to **mark the Item Paid or N/A**. The **Paid or N/A** buttons allows you to mark the spec rep, dest rep and orig rep on the project as Paid and N/A buttons. **If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

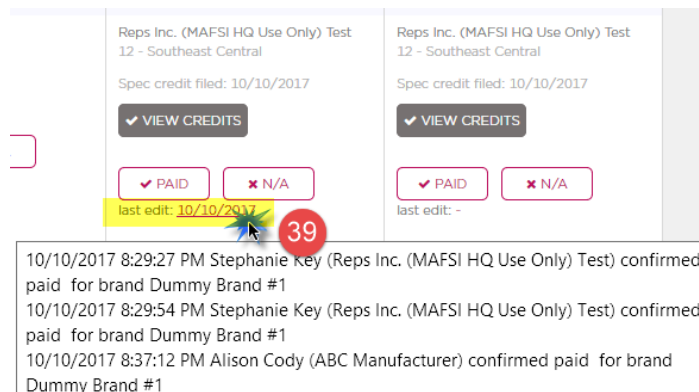


38. **LAST EDIT** – The **Last Edit** hyperlink, under the **Paid and N/A Button**, will allow you to see who last edited this field. This could be one of the three reps or someone at your company.



**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 Repts

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

### my credit tracking: reps overview

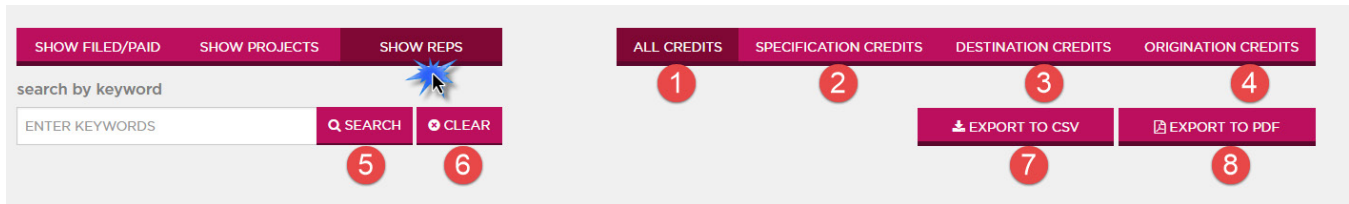
This screen enables you to track specification, destination and origination credits in an overview format or by project or rep firm.

To see rep firm details, please click and highlight the entire brand row. To see project details, please click on the project in the expanded rep firm view.

You can export this data using the EXPORT TO CSV or EXPORT TO PDF buttons on the right.

The screenshot shows the 'my credit tracking: reps overview' interface. At the top, there are navigation buttons: 'SHOW FILED/PAID', 'SHOW PROJECTS', and 'SHOW REPS' (highlighted with callout 6). Below these are search filters: 'search by keyword' with an input field 'ENTER KEYWORDS', 'SEARCH' (callout 5), and 'CLEAR' (callout 6) buttons. On the right, there are tabs for 'ALL CREDITS' (callout 1), 'SPECIFICATION CREDITS' (callout 2), 'DESTINATION CREDITS' (callout 3), and 'ORIGINATION CREDITS' (callout 4). Below the tabs are 'EXPORT TO CSV' (callout 7) and 'EXPORT TO PDF' (callout 8) buttons. Under 'current filters:', it says 'no filters selected'. Below that are 'CHANGE FILTERS' (callout 9), 'CLEAR ALL FILTERS' (callout 10), and 'FILTERS PRESETS' (callout 11) buttons. Under 'additional filters:', there are several dropdown menus: 'AWARDED STATE' (callout 12), 'TIME PERIOD' (callout 13), 'PAID STATUS' (callout 14), 'FILED STATUS' (callout 15), 'REP FIRMS' (callout 16), and 'BRANDS' (callout 17). Below the filters is an alphabetical index 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 ALL' with 'ALL' highlighted (callout 18). Below the index is a 'DATES:' section with 'All Date' (callout 19) and 'Day' (callout 20) dropdowns, and an 'APPLY' button (callout 21). The main data table has columns for 'REP', 'TOTAL CREDITS', 'SPECIFICATION CREDITS', 'DESTINATION CREDITS', and 'ORIGINATION CREDITS'. Each of these categories has sub-columns for 'PRIMARY', 'ALT', 'EQUAL', and 'TOTAL'. The first row of data is for 'Reps Inc. (MAFSI HQ Use Only) Test 12 - Southeast Central' (callout 22), with values: Primary Total 30 (callout 23), Spec Total 0 (callout 24), Dest Total 30 (callout 25), and Orig Total 29 (callout 26). The second row is for 'Non Member 15 - Texas/Oklahoma' with values: Primary Total 33, Spec Total 33, Dest Total 3, and Orig Total 4. The third row is for 'Non Member 26a - British Columbia' with values: Primary Total 0, Spec Total 0, Dest Total 0, and Orig Total 0. The 'TOTAL COUNTS' row (callout 27) shows: Primary Total 63, Spec Total 33, Dest Total 33, and Orig Total 33. Below the table is a second table with the same structure but with empty data rows.

## Show Projects – Buttons – Top of Page

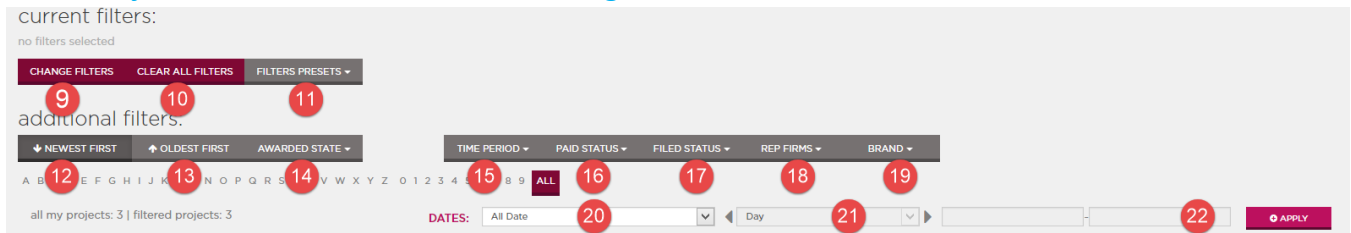


1. **ALL CREDITS** - This button will show you all your projects where your rep firms are eligible for one (or a combination) of the following credits: Specification, Destination and/or Origination.
2. **SPECIFICATION CREDITS** – Clicking this button will show you all your projects where your rep firms 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.

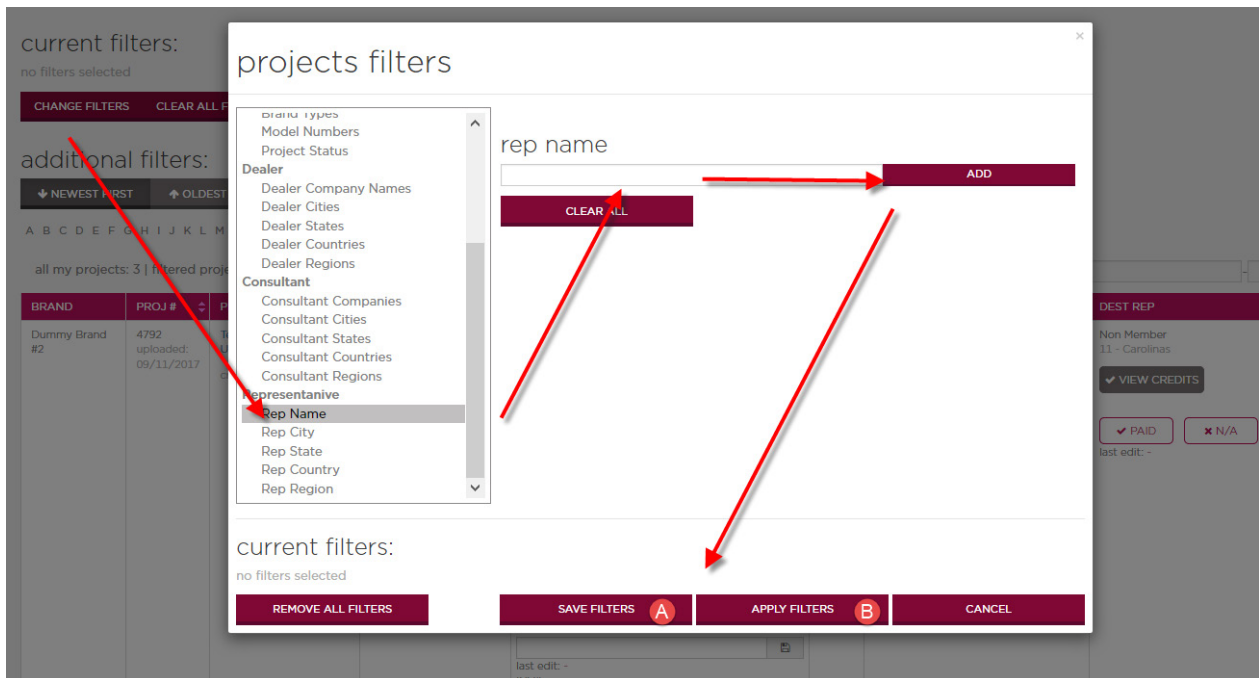
**NOTE:** This keyword search DOES NOT work on brand. Please use the BRAND drop down filter (#19) to perform a brand search.

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

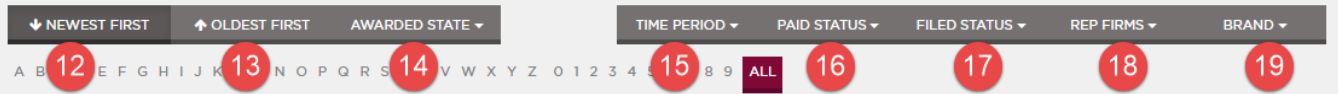


9. **CHANGE FILTERS** - These **Filters** narrow the projects in the search results in the Show Projects table. For instance, to build a filter for a few of your rep groups combined, Click the Change Filters button and follow the arrows below. Don't forget to click the "Add" button after each selection.
  - 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**.



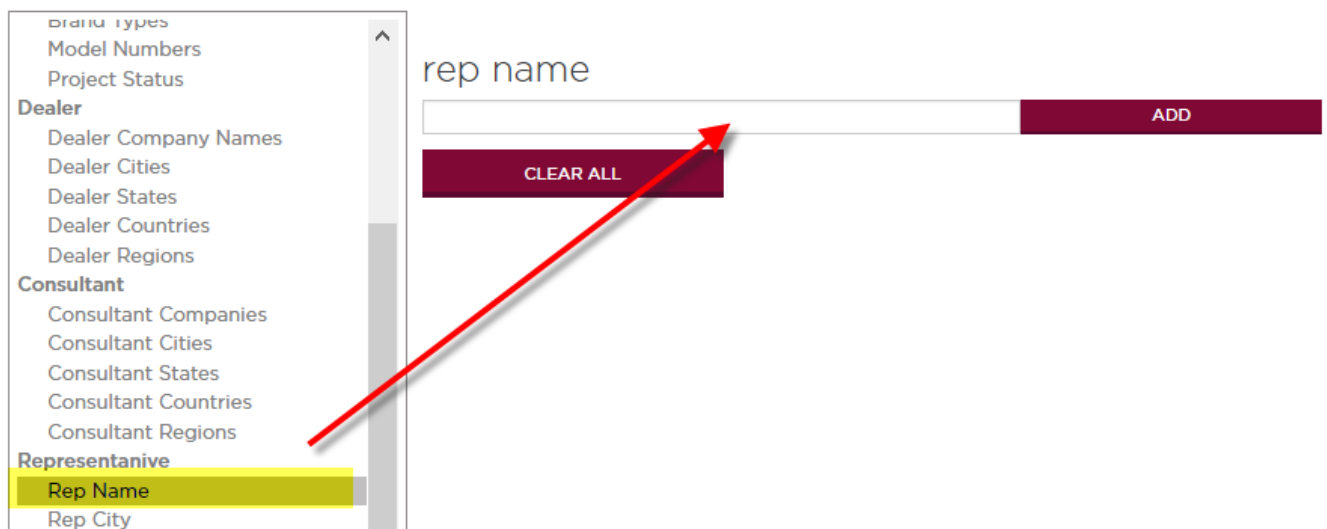
10. **CLEAR ALL FILTERS** - This button **Clears All Filters** that have been applied to the search results in the Show Projects table.
11. **FILTER PRESETS** - This **Filter Preset** dropdown button shows you all the **Saved Filters** that you have created under **Change Filters** and then clicked **Save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

additional filters:



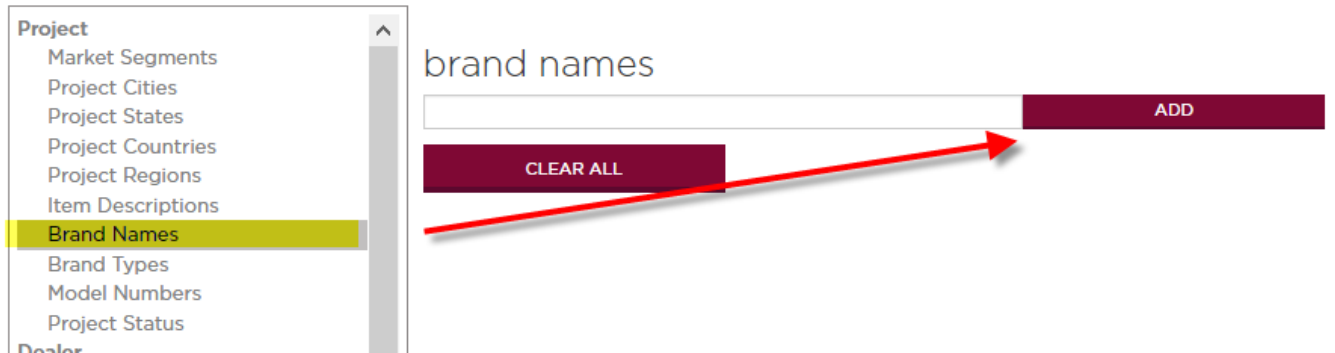
12. **NEWEST FIRST** - The **Newest First Filter** sorts the projects in the search results with the newest project on top in the Show Projects table. Default sort order is Project Number, which is usually in line with the newest to oldest project dates, but this option exists, just in case.
13. **OLDEST 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.*

## projects filters



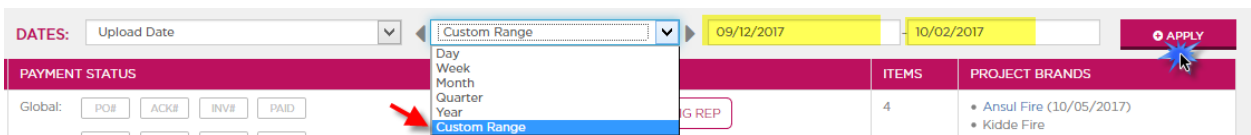
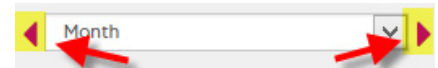
19. **BRANDS** – The **Brands Filter** is a quick way to drill down to projects for one of your brands. Quick filter choices include **all your brands and each brand separately (if applicable)**. **Note:** *If you would like to build a filter for more than one of your Brands, please use Change Filters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

## projects filters



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	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

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

BRAND NAME	PROJECT	UPLOADED	AWARDED	FILED	PAID	SPEC CREDITS	DEST CREDITS	ORIG CREDITS	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		1	1	1	1	0	21	21	21

- 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.
- 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.
- 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.
- 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.
- 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.
- BRAND** – The **Brand Column** shows a list of your brands and is sortable by clicking the header.
- 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.
- UPLOADED COLUMN** – The **Uploaded Column** shows you the Uploaded Date, and is sortable by clicking the header.
- 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/manufacturing-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.

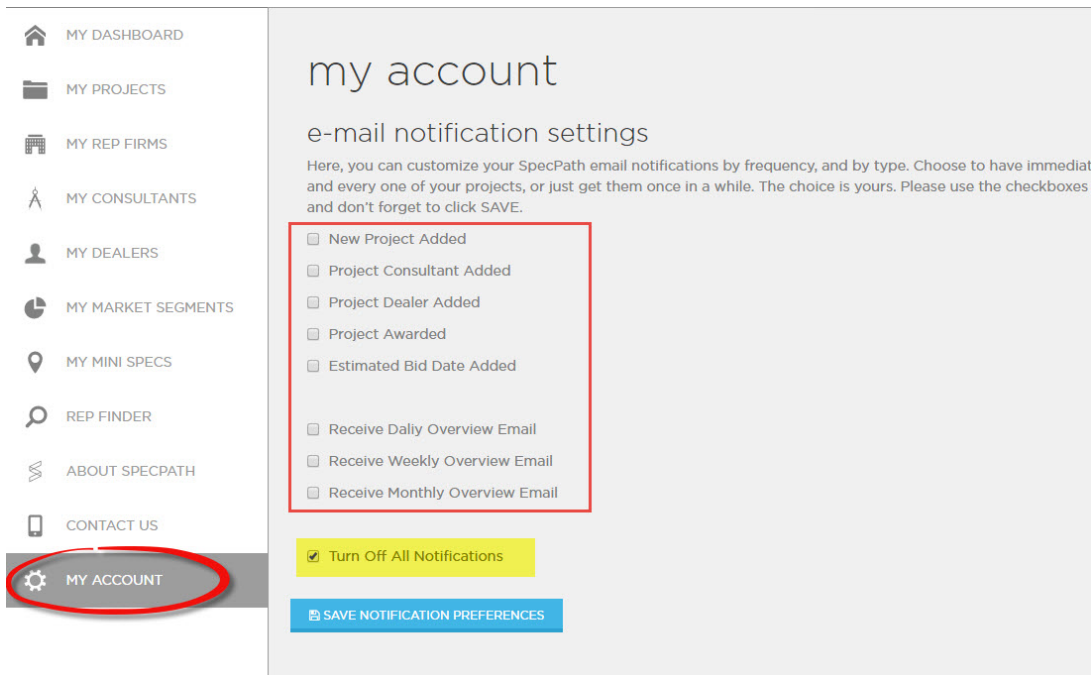
You will have to **TURN ON** the notifications you would like to receive on your [My Account Page](#) in SpecPath®.

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!**