



**Buyer Portal
User Manual**

Table of Contents

INTRODUCTION 3

 ACCESSING THE BUYER PORTAL..... 3

DASHBOARD 4

 DASHBOARD FEATURES..... 4

 7 Day Calendar View..... 4

 Create a Work Order Button..... 4

 My Overview - Pending and Scheduled Work Orders: 4

 Today’s Events..... 4

 Completed Work Orders 4

 Spend Overview..... 4

ADDING ITEMS/PRODUCTS 5

 VIEW, EDIT, OR COPY ITEM..... 6

VIEW PROFILE 7

 ADDING TEAM MEMBERS/CONTACTS 7

 VIEW/EDIT CONTACTS..... 7

CALENDAR 8

 LIST VIEW 8

 CALENDAR VIEW 8

 Calendar Event Details..... 9

 VIEWING DID NOT RUN DETAILS IN THE CALENDAR..... 10

 DESCRIPTIONS OF THE REASONS UNPERFORMED..... 11

 REASON CODE NOTATIONS YOU MAY SEE 11

 Status of Not Started with the Rescheduled Reason Code note of DNR (Did Not Run)..... 11

 Status of “In Progress” (Event Has Started) with the Reason Code and the Original Scheduled Date..... 12

 Status of “Completed” (Event Was Executed) with the Reason Code and the Executed Date 12

SCHEDULING WORK ORDERS 13

 ADD WORK ORDER 13

 EDIT WORK ORDER 17

REPORTS 19

 BILLED BUDGET REPORT..... 19

 CAPACITY REPORT 19

 COMMITMENT REPORT 20

 DEPARTMENT SCHEDULE REPORT 20

 EVENT STATUS REPORT..... 21

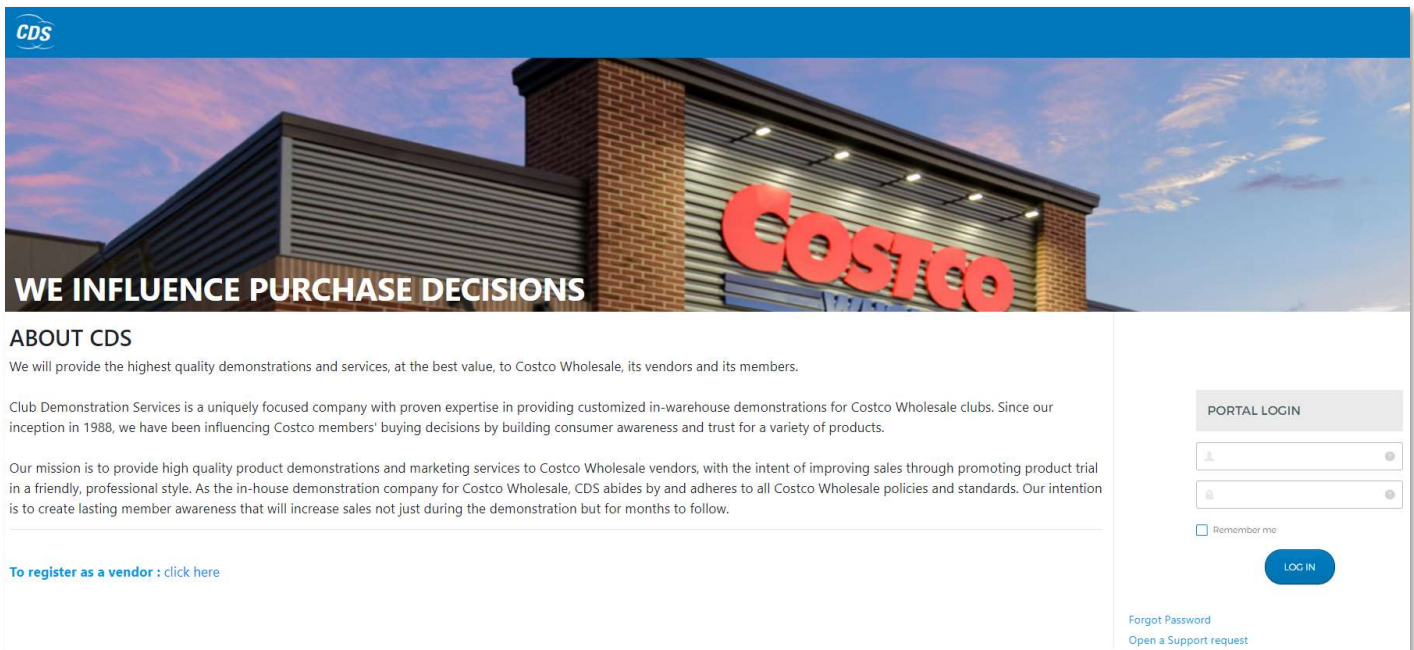
Introduction

The purpose of this manual is to provide you with a basic overview of the Buyer Portal. The manual gives you step-by-step instructions on how to add, edit and view information. Your ability to edit information is determined by the type of permissions you have. If at any time you have questions concerning the Buyer Portal, please contact our support team at **1-888-900-4276**. They will be more than willing to walk you through features or help you navigate to features you cannot find.

Accessing the Buyer Portal

1. Open Google Chrome
2. Go to <https://portal-cdsus.demosystem.net>
3. Login with your email address and password

Browser Requirements: Google Chrome



CDS

WE INFLUENCE PURCHASE DECISIONS

ABOUT CDS

We will provide the highest quality demonstrations and services, at the best value, to Costco Wholesale, its vendors and its members.

Club Demonstration Services is a uniquely focused company with proven expertise in providing customized in-warehouse demonstrations for Costco Wholesale clubs. Since our inception in 1988, we have been influencing Costco members' buying decisions by building consumer awareness and trust for a variety of products.

Our mission is to provide high quality product demonstrations and marketing services to Costco Wholesale vendors, with the intent of improving sales through promoting product trial in a friendly, professional style. As the in-house demonstration company for Costco Wholesale, CDS abides by and adheres to all Costco Wholesale policies and standards. Our intention is to create lasting member awareness that will increase sales not just during the demonstration but for months to follow.

[To register as a vendor : click here](#)

PORTAL LOGIN

Remember me

LOG IN

[Forgot Password](#)
[Open a Support request](#)

Dashboard

Upon Logging in, you will see the **Dashboard** page with a 7 day calendar across the top filter by your region/department.

The dashboard interface includes a top navigation bar with 'CDS', 'DASHBOARD', 'ITEMS', 'CALENDAR', 'REPORTING', and 'USERS' tabs. A user profile for 'Costco Corporate Kirkland Signature Buyer Portal' is visible in the top right. Below the navigation is a 'SCHEDULED' and 'REQUESTED' filter bar, with the current date 'Sep 19 - 25, 2022' and a 'SUBMIT EVENT REQUEST' button.

The main section is a 7-day calendar grid. Each day's events are listed with product names and counts. For example, Monday (09/19/2022) shows 'Collagen Peptides Unflavored' (330) and 'Organic Dark Chocolate Keto N' (317). A legend below the calendar identifies event types: Merchandising (yellow), Product Demonstration (blue), Roadshow (brown), WGE (dark blue), Special Event (orange), Training (light blue), Vendor Performed (purple), Combo (green), and Split (red).

MY OVERVIEW

Events	
Pending	5
Scheduled	35

COMPLETED WORK ORDERS

Work Order #	Event	Total WHS	Total Events	Start Date	End Date
1243784		17	17	01/31/2020	01/31/2020
1243786		6	6	02/01/2020	02/01/2020
1243790		1	2	02/02/2020	02/03/2020
1243790		1	2	02/02/2020	02/03/2020
1248660		35	35	02/10/2020	02/10/2020
1297724		5	24	05/13/2021	05/25/2021
1300359		5	10	06/01/2021	06/02/2021

TODAY'S EVENTS

Status	Count
Not Started	2734
In Progress	1916
Completed	3
Did Not Run	884

SPEND OVERVIEW

Department Number: (Multiple values) | Costco Region: (Multiple values) | Date Range: Fiscal YTD

Buyer Spend Overview

Spend Breakdown:

- Total Spend: \$467,599,234
- KS: \$44,072,551 (9.43%)
- Non-KS: \$423,526,683 (90.57%)

Event Distribution

Day	Percentage
Sun	13.0%
Mon	12.2%
Tue	13.8%
Wed	14.4%
Thu	14.8%
Fri	16.1%
Sat	15.6%

Dashboard Features

A quick view of your 7 day event calendar, your pending and scheduled work orders, today's events, completed work orders and your spend overview (KS vs Non-KS) appear in the dashboard. You can also create a Work Order from the dashboard page.

7 Day Calendar View: Displays a 7 day view of the events in your region/department from the current date and 6 days forward.

Create a Work Order Button: This button takes you to the create work order page to schedule event requests.

My Overview - Pending and Scheduled Work Orders: Allows you to view your pending requests and find/edit Scheduled Events.

Today's Events: Today's Events displays the events for the current day only. The status of each event shows as Not Started, In Progress, Completed and Did Not Run.

Completed Work Orders: The Completed Work Orders displays consolidated event information. Clicking on the detail of an event will show the detailed results of each event.

Spend Overview: The spend overview shows your event spend year to date. It breaks down your spend by KS vs Non-KS spend.

Adding Items/Products

This function allows you to add a New Item to your account to Schedule events.

1. Click on the Items menu
2. Click on the Add New Item button
3. Enter the Item information
4. Click on the Create Item button. The Item will be sent for review/approval by our scheduling team and will be available to schedule once approved.

The screenshot shows the 'Add New Item' form in the Buyer Portal. The form is divided into several sections:

- Item Description:** A text input field for the item name.
- Item #:** A text input field for the item number.
- Department:** A dropdown menu with the option 'Select A Department'.
- Sell Unit:** A text input field.
- Serving Size:** A text input field.
- Sample Per Unit Sell:** A text input field with the note 'only numbers'.
- Method Of Cooking:** A text input field.
- Enhancements:** A dropdown menu with the option 'Select'.
- Others:** A text input field with a plus sign icon.
- Allergens:** A dropdown menu with the option 'None' and a checkbox.
- Peanut Allergy Sign:** Radio buttons for 'Yes' and 'No'.
- Preparation Instructions:** A large text area for providing instructions.
- Selling Points:** A large text area for providing selling points.
- Product Packing Photo:** A section for uploading a photo, with a note: 'Primary Product Packing Photo (Include the front and back of the label showcasing the product ingredients (ingredient deck)). Attachment Required.' It includes a 'DRAG YOUR FILES HERE' area and a 'CLICK HERE TO BROWSE' link.
- Other Attachments:** A section for uploading other files, with a 'DRAG YOUR FILES HERE' area and a 'CLICK HERE TO BROWSE' link.

On the right side of the form, there are two buttons: 'CANCEL' and 'CREATE ITEM'. Below the buttons, a note states: 'All fields marked with an asterisk (*) are required.'

View, Edit, or Copy Item: View, Edit, or Copy item information.

1. Click on the Item menu
2. Click on Item to view the product detail.
3. To Edit, click on the Edit button and change the desired Item information and click on Save.
4. To Copy, click on the Copy button and change the desired Item information and click on Save

Note: For both Edit and Copy Item changes, the Item will be sent for review/approval by our scheduling team and will be available to schedule once approved.

Item #	Item Description	Vendor Name	Department	Item Status	Date Added	Last Updated	Copy Item
1193306	The Extreme Bean Hot & Spicy	1426828 ONT INC O/A Mitt & Steve's Tasty Beverage	13-Food	Active	Jul 23, 2019	Feb 3, 2022	COPY
683785	Bunny Bars Granola Bar Variety Pack	18 Rabbits	12-Candy	Active	Jul 23, 2019	Apr 1, 2020	COPY
1263285	Chocolate Banana Bar	18 Rabbits	12-Candy	Active	Jul 23, 2019	Apr 1, 2020	COPY
824986	18 Rabbits Granola Bars Variety Pack...	18 Rabbits	12-Candy	Inactive	Jul 23, 2019	Apr 1, 2020	COPY
967861	Cherry, Dark Chocolate Almond Bars ...	18 Rabbits	12-Candy	Inactive	Jul 23, 2019	Mar 23, 2020	COPY
856350	Boulder Clean Liquid Dish Soap	1908 Brands, Inc.	14-Sundries	Active	Jul 23, 2019		COPY

ITEM DETAILS ✕

[EDIT](#)
[COPY](#)

Item Description **Item #**

Seasoned Pork Loin Chops 26386

Department

61-Meat

Sell Unit

Serving Size

See Prep Instructions

Sample Per Unit Sell

40

Yield Per Hour

0

Method Of Cooking

Sautéed

Enhancements

Allergens

Peanut Allergy Sign

No

Preparation Instructions

1. Note: This item is RAW - must be cooked thoroughly and follow Food Safety Guidelines and Procedures

2. * A food thermometer must be calibrated and used to confirm internal temperature reaches 155 degrees for pork/beef, 165 degrees for poultry and 145 degrees for fish/seafood.

3. * Raw product must be maintained in a separate container and on ice. Samples should be maintained at 41 degrees or less.

View Profile

Adding Team Members/Contacts: Adding new contacts can be done on the Profile page.

1. Click on the Profile menu
2. Click on the Contacts tab
3. Click on the Add New Contact button
4. Enter the Contact information and check mark the region for each contact type.
5. Click on Save button.

ADD CONTACT
✕

Existing contact
Add new contact

First Name (*)

Last Name (*)

Email (*)

Country (*)
United States

Address (*)

City (*)

State (*)
Select

Zip Code(*)

Phone (*)

Fax

This is my billing address

Address

City

State
Select

Zip Code

Contact Type (*)

Billing (Contact responsible for Invoices) SELECT ALL DESELECT ALL

Bay Area

Los Angeles

Midwest

Northeast

Northwest

San Diego

Southeast

Texas

Broker (Broker Contact for Vendor) SELECT ALL DESELECT ALL

Bay Area

Los Angeles

Midwest

Northeast

Northwest

San Diego

Southeast

Texas

Scheduling (Contact responsible for Scheduling Events) SELECT ALL DESELECT ALL

Bay Area

Los Angeles

Midwest

Northeast

Northwest

San Diego

Southeast

Texas

CANCEL SAVE

View/Edit Contacts

1. Click on the Profile menu
2. Click on the Contacts tab
3. Click on the Contact Name to open Contact Detail page
4. To Edit, change the desired Contact information, add or remove a region, and click on Save.

Calendar

The List view displays a seven day view and the Calendar view displays a 30 day view in a calendar format. This calendar view allows you to view your events in a list or 30 day calendar view.

List View

The screenshot shows the 'List View' of the Buyer Portal. The interface includes a top navigation bar with 'CDS', 'DASHBOARD', 'ITEMS', 'CALENDAR', 'REPORTING', 'USERS', and 'HELP'. A user profile icon is in the top right. Below the navigation is a sidebar with filters: 'Start Date' (02-28-22), 'Departments' (All Departments), 'Vendor' (Search), 'Item# / Description' (Search), 'Service Type' (Merchandising, Product Demonstration, Roadshow, Special Event, Training, Vendor Performed), and 'Kirkland Signature' (KS Branded Item, Non-KS Item). The main area shows a table with columns: WORK ORDER, VENDOR, ITEM NO., DESCRIPTION, DEPARTMENT, # WHS, SERVICE TYPE, REGION, and PO#. The table is filtered for 'Feb 28, 2022' and shows items scheduled for Saturday, Sunday, and Monday.

WORK ORDER	VENDOR	ITEM NO.	DESCRIPTION	DEPARTMENT	# WHS	SERVICE TYPE	REGION	PO#
SATURDAY FEBRUARY 26, 2022								
1348536	Love Beets USA LLC	612743	Love Beets Pick 3 8oz	19-Deli	1	Product Demonstration	Texas	
SUNDAY FEBRUARY 27, 2022								
1348503	Frontera Foods	1191240	Stonefire Naan Dippers	19-Deli	1	Product Demonstration	Midwest	99999
1341684	Nutrawise - HL-RX	1221450	Youtheory Turmeric	93-Pharmacy	1	Product Demonstration	Northwest	Feb 2022
		1557746	Youtheory Daily Fat Burner	93-Pharmacy				
MONDAY FEBRUARY 28, 2022								
1321018	Orgain Inc.	1571175	Collagen Plus Superfoods	20-Health & Beauty	543	Product Demonstration	8 Regions	
1336069	General Mills Snacks	1269005	Autumns Gold Grain Free Granola Bar	12-Candy	41	Product Demonstration	Texas	genmills
1339922	Nestle Dept 13 17	693620	Abuelita Mexican Chocolate	13-Food	22	Product Demonstration	Bay Area	
1348569	Wild Planet Foods, Inc	7553	Tuna Wild Skipjack	13-Food	6	Product Demonstration	Texas	
1344933	Vita Food Products	134557	Budweiser Original BBQ Sauce 77oz	13-Food	5	Product Demonstration	Bay Area	
1347758	Costco Corporate Kirkland Signature	14370	KS Spinach Salad	63-Service Deli	4	Roadshow	Bay Area	12
1347525	Costco Corporate Kirkland Signature	89901	Cameo Apples	65-Produce	4	Roadshow	Bay Area	2345
1335618	Bitchin' Sauce	1617855	Heat, Cilantro, Pesto Almond Sauce Pack	19-Deli	4	Roadshow	San Diego	N/A
	Milton's Baking Co	1617886	Bombay, Pepita, Original Almond Sauce Pack	19-Deli				
		878663	Gluten Free Crispy Sea Salt Baked Crackers	12-Candy				
1337367	Bitchin' Sauce	1238273	Chipotle Organic Almond Dip	19-Deli	4	Roadshow	Midwest	
		1332258	3 Pack Green Onion, Spinach Artichoke & Cre...	19-Deli				
		1403521	Bitchin' Sauce 3 Pack (Original, Pesto, Cilantro)	19-Deli				
1348060	Costco Corporate Kirkland Signature	24585	White Grapefruit	65-Produce	3	Product Demonstration	Bay Area	12111
1347825	General Mills Dept 18	948400	KS Vanilla Ice Cream	18-Frozen	3	Product Demonstration	Midwest	99999
1347993	United General Bakery Upper Crust	413806	Apple Brown Betty	13-Food	2	Product Demonstration	Midwest	
1349083	General Mills Dept 18	759072	Eggo Homestyle Waffles	18-Frozen	2	Product Demonstration	Midwest	99999

Calendar View

The screenshot shows the 'Calendar View' of the Buyer Portal. The interface is similar to the List View but displays items in a 7-day grid. The top navigation bar and sidebar are the same. The main area shows a calendar starting on Monday, 02/28/2022. Each day's column contains a list of items with their work order numbers, descriptions, and counts. For example, Monday 02/28/2022 shows items like 'Collagen Plus Superfoods' (544), 'Bush Baked Beans' (16), and 'Mix & Match Potstic...' (3). The calendar view allows for a quick overview of items scheduled over a period of time.

Calendar Event Details

1. Clicking on the Date, above the listing of events in the calendar, will open a pop-up with the events happening on that day.

Sep 27, 2019

12489 | KS Yogurt 94

4164501 | KS Sparkling E... 64

440493 | KS Cashew Clus... 57

DATE DETAILS: SEP 30, 2019 ✕

Vendor	Item/Event name	# of Events	Event Type
Corporate	14562 - Whole Mushrooms	67	Product Demonstration
Corporate	17767 - KS 100% Colombian Supremo ...	2	Product Demonstration
Corporate	19454 - KS Wheat Bread	2	Product Demonstration
Corporate	17767 - KS 100% Colombian Supremo ... 50003 - KS 12 inch Cherry Pie	1	Product Demonstration

CLOSE

2. Clicking on the event in the grid of the calendar will open a pop-up showing the status of the events in each warehouse. This status will show if the event has Started, Completed or Not Started. If the event was canceled, it will display a cancelation reason in the Reason column. Clicking on the EDIT link will allow you to edit the work order.

Sep 27, 2019

12489 | KS Yogurt 94

4164501 | KS Sparkling E... 64

440493 | KS Cashew Clus... 57

EVENT DETAILS ✕

Event Date: Sep 25, 2019 Event Names: KS English Pub Style Fish & Chips 2.5lbs Request Number: 25058 [EDIT](#)

Service Type: Product Demonstration

Event Requested By:

Location#	Location Name	Status	Reason
021	BA-Danville, CA	Not Started	
025	BA-Reno, NV	Not Started	
029	BA-Roseville, CA	Not Started	
031	BA-Fresno, CA	Not Started	

Viewing Did Not Run Details in the Calendar

1. Click on the Calendar Menu
2. Filter for or find the date you're looking for in the List or Calendar view
3. Click on the specific demo to check the details of the Work Order.

SCHEDULED		REQUESTED		STARTING Feb 28, 2022		CALENDAR		LIST	
Monday 02/28/2022	Tuesday 03/01/2022	Wednesday 03/02/2022	Thursday 03/03/2022	Friday 03/04/2022	Saturday 03/05/2022	Sunday 03/06/2022			
1571175 Collagen Plus... 544	745680 Bush Baked Be... 6	112537 Mix & Match P... 5	1360484 Three Bridges 101	31801 Marinated Wild ... 96	1267379 Hydration Mul... 350 1390499 Energy Multipl... 1468944 Hydration Mul... 1471444 Hydration Mul...	1623665 From The Gro... 96			
1269005 Autumn's Gold... 41	1119713 Pasta Prima M... 6	510131 Chicken Fried R... 5	31801 Marinated Wild ... 96	1348521 Veggie Crisps 73		13702 Irish Stew 41			
693620 Abuelita Mexic... 22	229570 KS Daskalides ... 5	Galia Melon 5	1623665 From The Gro... 96	985695 Annie's Organic... 57		693620 Abuelita Mexica... 22			
7553 Tuna Wild Skipjack 6	112537 Mix & Match P... 5	KS Spinach Salad 4	1507061 Organic Authe... 53	938534 Sara Lee Soft & ... 45		13702 Irish Stew 132			
134557 Budweiser Orig... 5	510131 Chicken Fried R... 5	Cameo Apples 4	87628 KS 18 gallon Tras... 5	846156 Nature Valley O... 41		835795 BioAstin 12mg 112			
+11 More	+19 More	+10 More	+13 More	+14 More		31801 Marinated Wild ... 96			
						985695 Annie's Organic... 70			+5 More
						+12 More			

EVENT DETAILS ✕

Event Date: Mar 1, 2022	Vendor: Bush Brothers & Co	Event Items: 745680 - Bush Baked Beans Original	Request Number: 1349183
Service Type: Product Demonstration			
Event Requested By: Christi Eslyn(CEslyn@daymon.com)			

SNAPSHOT	DPIS	
Location#	Location Name	Status
489	TX-Fort Worth, TX	Not Started
636	TX-Duncanville, TX	Not Started
641	TX-S Austin, TX	Not Started
664	TX-E Plano, TX	Not Started

Reason Unperformed

	LS DNR
	NSX DNR

Descriptions of the Reasons Unperformed

Code	Description
CBM	Cancelled by Warehouse Manager
CBO	Cancelled by Office
CDW	Cancelled due to weather conditions
CNP	Cancelled Due To No Product
CPD	Cancelled Pending Delete
LS	Low stock and no product
NCW	Not Carried In Location
NDK	No Demo Kit Received
NPP	No Product Purchased
NSX	No Staff. All other staff issues
SPU	Split Product Was Unavailable

Reason Code Notations You May See

The Reason Code for Unperformed events will display different reason codes based on the Rescheduled reason and will display a status of DNR (Did Not Run), the Original Demo Date (if the event has started) or an Executed Date (if the event was completed). See below for the three different notes that may appear in the Reason Unperformed column in the Calendar Event Details pop-up

Status of Not Started with the Rescheduled Reason Code note of DNR (Did Not Run)

EVENT DETAILS
✕

Event Date: Feb 28, 2022	Vendor: Orgain Inc.	Event Items: 2247 - Orgain Inc.	Request Number: 1321018
Service Type: Product Demonstration			
Event Requested By: Carrie Congine(ccongine@clubdemo.com)			

Location#	Location Name	Status	Reason Unperformed
001	NW-Seattle, WA	Not Started	NSX DNR
002	NW-Portland, OR	Not Started	
006	NW-Tukwila, WA	Not Started	

Status of "In Progress" (Event Has Started) with the Reason Code and the Original Scheduled Date

EVENT DETAILS ✕

Event Date: Mar 1, 2022	Vendor: Valley Fine Foods Co	Event Items: 832565 - Pasta Prima Organic Five Cheese Ravioli	Request Number: 1349283
Service Type: Product Demonstration			
Event Requested By: Sue Watkins(SueWatkins@Clubdemo.com)			

SNAPSHOT	DPIS
----------	------

Location#	Location Name	Status	Reason Unperformed
002	NW-Portland, OR	In Progress	NSX Orig. 02/27/2022

Status of "Completed" (Event Was Executed) with the Reason Code and the Executed Date

EVENT DETAILS ✕

Event Date: Feb 28, 2022	Vendor: Orgain Inc.	Event Items: 2247 - Orgain Inc.	Request Number: 1321018
Service Type: Product Demonstration			
Event Requested By: Carrie Congine(ccongine@clubdemo.com)			

782	BA-Turlock, CA	Not Started	
783	MW-Eden Prairie, MN	Not Started	
784	MW-Grand Rapids, MI	Completed	LS Exec. 03/01/2022
785	NE-Riverhead, NY	Not Started	
786	MW-Green Oak Township, MI	Not Started	
788	MW-West Des Moines, IA	Not Started	

Scheduling Work Orders

Add Work Order

1. From the Dashboard, click on the Create a Work Order button.
2. Select the Service for the event you're scheduling and click on Next

← Back to Dashboard
Work Order Request
 (Product Demonstration)

SELECT A SERVICE SELECT DATES SELECT LOCATIONS SELECT ITEMS SERVICE INFORMATION

Merchandising
 Coordination of merchandising projects for restickering, labeling, audits and more

Product Demonstration
 Product sampling and demonstration events, typically 6 hours in length with one Sales Advisor

Roadshow
 Events that promote various items (not generally carried as inline items in Costco) and run multiple consecutive dates in select warehouses, generally Thursday - Sunday, open to close with multiple Sales Advisors

Training
 Training only LOB

Vendor Performed
 Buyer approved events where vendor provides their own W-2 employees, tables, equipment and supplies; CDS ensures vendor compliance with Costco's food handling and safety requirements

[Next](#)

3. Select the Dates for the event in the Calendar and click on Next.

← Back to Dashboard
Work Order Request
 (Product Demonstration)

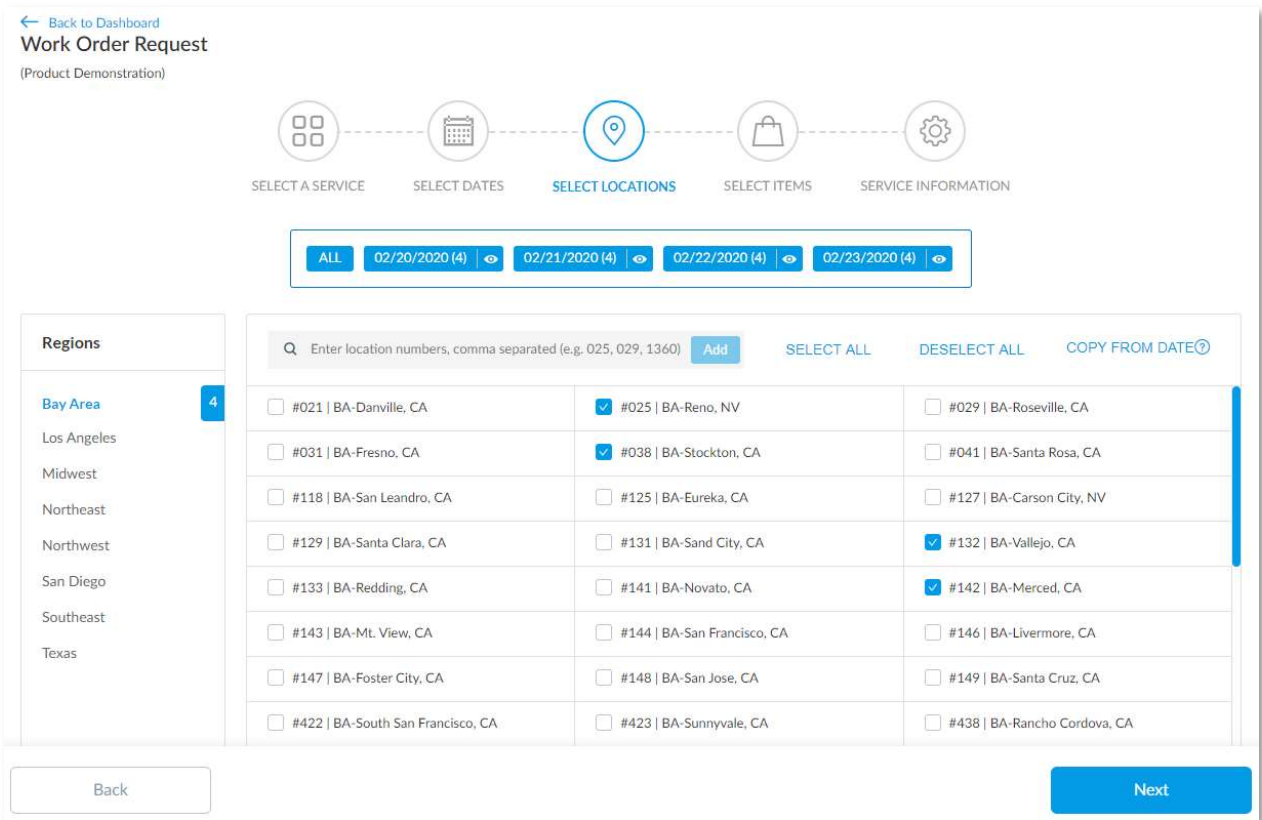
SELECT A SERVICE **SELECT DATES** SELECT LOCATIONS SELECT ITEMS SERVICE INFORMATION

< January 2020 February 2020 > Selected **4 days**

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4	26	27	28	29	30	31	1
5	6	7	8	9	10	11	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22
26	27	28	29	30	31	1	23	24	25	26	27	28	29
							1	2	3	4	5	6	7

[Back](#)
[Next](#)

- Select your Locations for each Date. All is selected by default, but you can click on individual dates at the top to select specific warehouses for those dates.



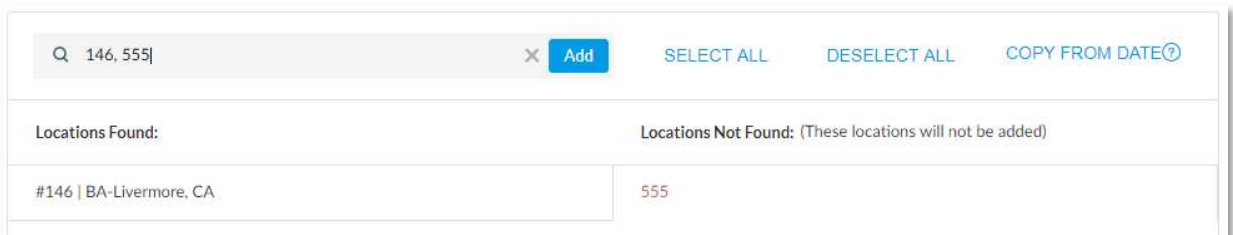
- To copy the locations from one date to another, click on the date where no locations have been selected, click on the Copy from Date button, select the date you want to copy from, then click on Add.

You can copy your location selections from a previously entered date, and apply them to your current selection.

- 20 February 2020 (3)
- 21 February 2020 (4)
- 22 February 2020 (3)
- 23 February 2020 (3)
- Apply to all dates

CANCEL REPLACE ADD

- You can also type in or copy and paste a comma separated warehouse number list into the “Enter location numbers...” field. This will show you all the location found and invalid locations so you can correct your number.



5. Select your Items by click on the + to the right of the item or double clicking on the item in the grid.
 - a. You can search for your items by number, name or department in the Search field
 - b. Added items will appear in the right-side grid
 - c. Add the substitute item in the right-side grid by clicking on the Substitute Item link
 - d. Remove an item by clicking on the Trash Can icon in either grid.
6. To add a Split Partner and their items, click on the Add Split Partner link.

← Back to Dashboard
Work Order Request
 (Product Demonstration)

SELECT A SERVICE SELECT DATES SELECT LOCATIONS **SELECT ITEMS** SERVICE INFORMATION

Valley Fine Foods Co

Q Search

Item Number	Item Name	Department	Yield Per Hour	
229644	Pasta Prima Spinach and Mozzarella Ravioli	18-Frozen	129	
21368	Pasta Prima Grilled Chicken & Mozzarella Ravioli	19-Deli	0	+
391980	Artichoke Olive and Basil Ravioli	19-Deli	0	+
446487	Valley Fine Pasta Project	17-Cooler/Refrig	0	+
807070	Pasta Prima Organic Spinach Lasagna 36oz	19-Deli	0	+
832565	Pasta Prima Organic Five Cheese Ravioli	18-Frozen	0	
833055	Organic Superfood Ravioli	19-Deli	0	+
1184321	Organic Butternut Squash Ravioli	19-Deli	0	+

SELECTED ITEMS 🔄 CLEAR

832565	Pasta Prima Organic Five Cheese Ravioli	Substitute Item	
229644	Pasta Prima Spinach and Mozzarella Ravioli	Substitute Item	

+ ADD SPLIT PARTNER ?

Back Next

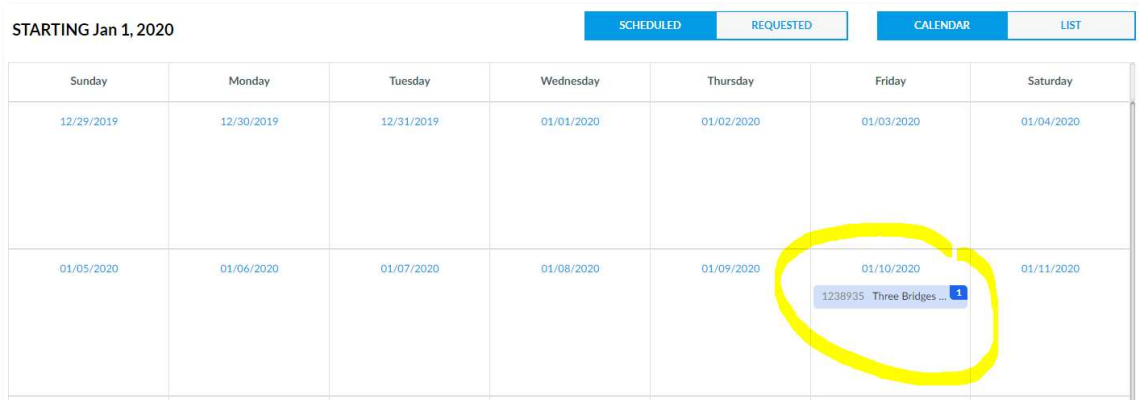
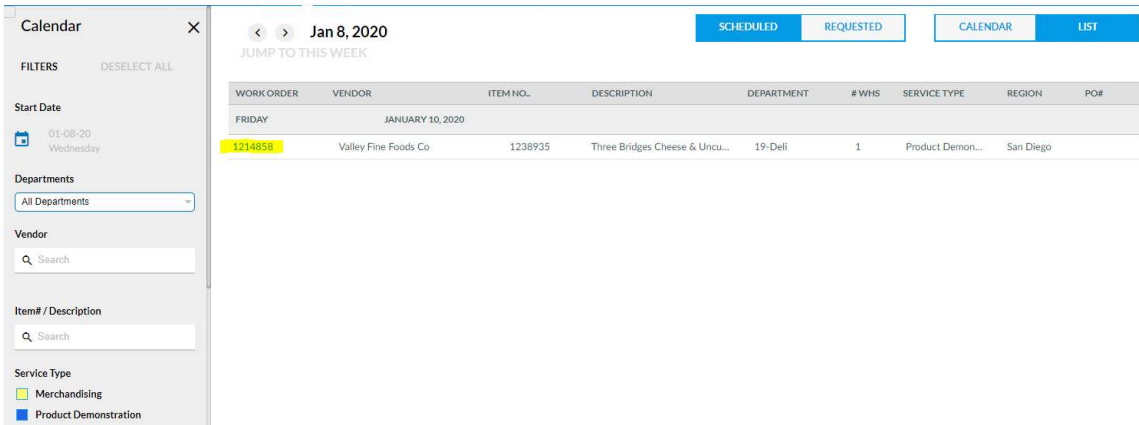
7. Finish your request by completing the Service Information and click on Submit
 - a. Add your PO number
 - b. Add your Demo Kit Items
 - c. Add your Attachments for the event
 - d. Add your Work Order Notes

The screenshot shows the 'Work Order Request' form for a 'Product Demonstration'. At the top left, there is a 'Back to Dashboard' link. The form title is 'Work Order Request (Product Demonstration)'. A progress bar at the top indicates five steps: 'SELECT A SERVICE', 'SELECT DATES', 'SELECT LOCATIONS', 'SELECT ITEMS', and 'SERVICE INFORMATION', with the last step being the active one. The form fields include: 'PO#' with a dropdown menu showing '(Valley Fine Foods Co)'; 'DEMO KIT ITEMS' with checkboxes for 'Branded hat and/or apron', 'Branded tablecloth', 'Other', 'POP material', 'Training script/FAQs', 'Samples', and 'Recipe Cards'; 'ATTACHED MATERIALS' with a drag-and-drop area and a 'CLICK HERE TO BROWSE' link; and 'WORK ORDER NOTES' with a text input field. At the bottom, there are 'Back' and 'Submit' buttons.

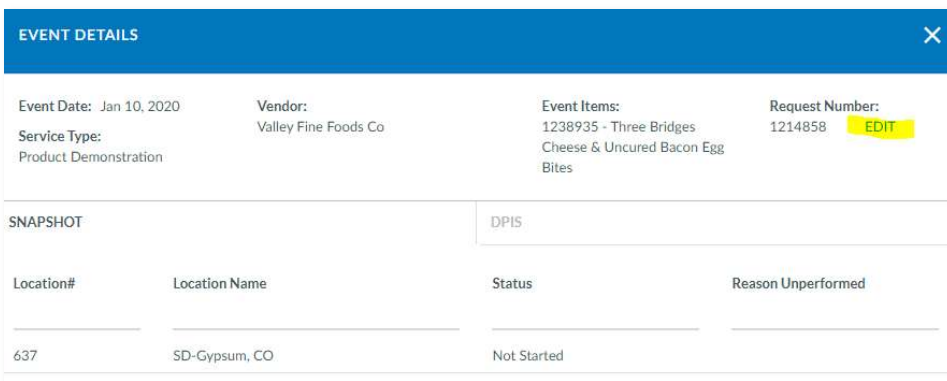
Note: The request is sent to the Scheduling team and an email is sent to you confirming the Work Order Request was submitted. Once the event is approved, another confirmation email will be sent to you with the event details.

Edit Work Order

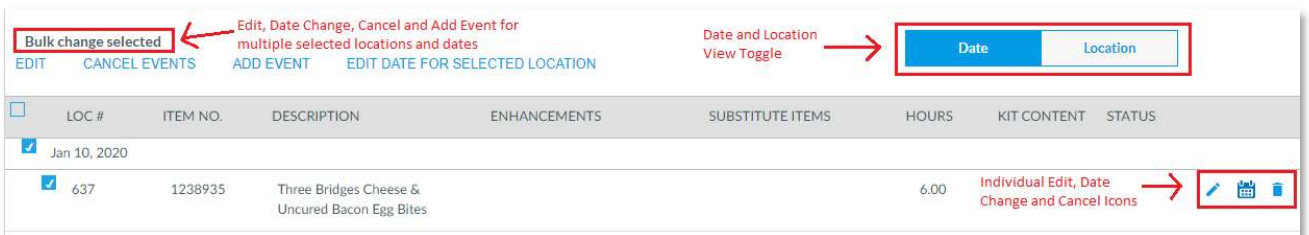
1. From the Calendar list or calendar view, find the work order you want to edit.
2. Click on the Request Number from the list view or click on the event in the calendar view.



3. When the Event Details pop-up appears, click on the Edit link



4. Select the Dates and Locations you need to edit



- a. You can individually edit, change a date or cancel an event with the icons to the right of the one location and date.

- b. You can change all selected locations and dates by using the Bulk Change links at the top.
 - c. You can toggle between grouping the events by Date or by Location by using the Date and Location buttons on the top right of the page.
5. To **Add an Event**, click on the Add Event link at the top of the page. Select a date & location and click on Save.
6. To **Change the Date of an event**, check mark the date and location where you want to change the date, click on the Calendar icon to the right of the individual event or click on the “Edit Date for Selected Locations” link at the top. Select a new date from the calendar and click Save.
7. To **Change the Location of an event**, click on the Locations button, check mark the date and location where you want to change the location, click on the “Edit Location for Selected Dates” link at the top. Type in a new location and click Save
8. To **Cancel Events**, check mark the dates and locations where you want to cancel events, click on the Trash Can icon to the right of the individual event or click on the Cancel Events link at the top of the page to cancel all events selected.
9. To **Edit the Details of an Event**, check mark the dates and locations where you want to edit events, click on the Pencil icon to the right of the individual event or click on the Edit link at the top of the page to edit all events selected. You can edit the Substitute Item, Demo Kit, PO Number, Attachments, Notes, Method of Cooking, Enhancements and Preparation Instructions. Once you’ve made your changes, click on Save.

Edit Events

DISCARD CHANGES
SAVE

REQUEST NUMBER : 1214858

ITEMS

Three Bridges Cheese & Uncured Bacon Egg Bites SUBSTITUTE AVAILABLE

SERVICE INFO

Demo Kit Items

Select ▾

PO# *

Attached Materials

DRAG YOUR FILES HERE

OR CLICK HERE TO BROWSE

Notes/Special Instructions

DPIS

Method Of Cooking

Microwaved ▾

Enhancements

Select Enhancements ▾

Preparation Instructions

1. Peel back film and remove paper tray outer packaging.
2. Place 2 paper egg bite trays in microwave and cook on HIGH for approximately 2 to 3 minutes until internal temperature reaches 165°F.
3. While egg bites are cooking, prepare sample tray with 8 to 10 baking cups.
4. Remove heated egg bites microwave and transfer to holding container. Let stand for 1 minute. Start the next batch.
5. Cut each egg bite into 4 equal pieces by making a cross cut.
6. Fill each backing cup with 1/4 piece of egg bite and serve to member. Provide utensils for members' use
7. Maintain cooking and tray rotation.

Note: All changes are sent to the Scheduling team and an email is sent to you confirming the Work Order Change Request was submitted. Once the changes are approved, another confirmation email will be sent to you with the event details.

Reports

We offer five different reports. We offer the Billed Budget Report, Capacity Report, Commitment Report, Department Schedule Report and the Event Status Report.

Billed Budget Report

The Billed Budget Report displays billed event information by summary, detail, fiscal year or state.

1. Click on the Billed Budget Report link.
2. Once the report opens you can change the filters on the left-hand side of the report.
3. To export the report to Excel, click on the on the **Export to Excel** link, click on Download on the pop-up and then click on the Excel report that appears on the bottom of the page.

[EXPORT TO EXCEL](#)

Billed Budget Item Report - From Dec 01, 2019 to Dec 31, 2019
 Region(s): All
 Report Period: Dec 01, 2019 to Dec 31, 2019 Data Last Updated: 1/14/2020 11:51:31 AM EST

The highlighted filters must be selected before data will show

Start Date	Dec 01, 2019
End Date	Dec 31, 2019
Costco Region	(All)
Department Number	(All)
Line Of Business	(All)
State	(All)
Vendor	
Item Name	(All)

WH#	Event Date	Region #	State	Vendor	Department	Item #	Item Name	Split Department	Split Item	Line Of Business	Labor Charge + Tax	Product Charge + Tax	Enhancement Charge	Coupon Charge	Suppl +
2	12/10/2019	Northwest	OR	Corporate	18-Frozen	26968	lasagna			Product Demonstration	\$125.00	\$103.92	\$0.00	(\$24.00)	
6	12/11/2019	Northwest	WA	Corporate	18-Frozen	26968	lasagna			Product Demonstration	\$125.00	\$77.94	\$0.00	(\$18.00)	
28	12/1/2019	Los Angeles	CA	Corporate	13-Food	17767	100% colombian supreme coffee			Product Demonstration	\$0.00	\$0.00	\$0.00	\$0.00	
					18-Frozen	88744	cooked italian style meatballs			Product Demonstration	\$0.00	\$0.00	\$0.00	\$0.00	
	12/4/2019	Los Angeles	CA	Corporate	13-Food	17767	100% colombian supreme coffee			Product Demonstration	\$0.00	\$0.00	\$0.00	\$0.00	
	12/8/2019	Los Angeles	CA	Corporate	13-Food	17767	100% colombian supreme coffee			Product Demonstration	\$0.00	\$0.00	\$0.00	\$0.00	
	12/9/2019	Los Angeles	CA	Corporate	13-Food	17767	100% colombian supreme coffee			Product Demonstration	\$0.00	\$0.00	\$0.00	\$0.00	

Capacity Report

The Capacity Report displays the event capacity by day.

1. Click on the Capacity Report link.
2. Once the report opens you can change the filters on the left-hand side of the report.
3. To export the report to Excel, click on the on the **Export to Excel** link, click on Download on the pop-up and then click on the Excel report that appears on the bottom of the page.

[EXPORT TO EXCEL](#)

Event Capacity | Event Capacity Weekly | Region Schedule Detail | Detail - Region Schedule Daily | Excel - Region Schedule Daily | Info

Region Schedule Report: Event Capacity
 Region: Bay Area & Los Angeles

Subtotal By: List

Start Date: Jan 01, 2020
 End Date: Jan 31, 2020

Line of Business: Product Demo

Costco Region: (All)

Department Number: (All)

Vendor Name:

Click on Warehouse to Drilldown to Detail

[CLICK HERE to View Weekly Rollup](#)

Total Events Scheduled
 Product Demos: 2,684 | Road Show: 50
 RED is underutilized

Warehouse	Total Capacity	Tuesday			Wednesday			Thursday		
		Product Demo	Roadshow	Total	Product Demo	Roadshow	Total	Product Demo	Roadshow	Total
117 - LA-Westlake, CA	15				14	0	14	15	1	16
118 - BA-San Leandro, CA	14				1	0	1			
119 - LA-Maui, HI	15	1	0	1	13	0	13	15	1	16
120 - LA-Hawaii Kai, HI	15				14	0	14	13	0	13
122 - LA-Tustin, CA	20				12	0	12	14	0	14
126 - LA-Garden Grove, ...	20				14	0	14	12	0	12
128 - LA-Simi Valley, CA	20				14	0	14	14	0	14
130 - LA-Los Feliz, CA	20				17	0	17	15	1	16
140 - LA-Kona, HI	12				11	0	11	8	0	8
410 - LA-Norwalk, CA	20				13	0	13	12	0	12
411 - LA-Fountain Valle...	20				14	1	15	12	1	13
412 - LA-Azusa, CA	20				14	0	14	11	1	12
418 - LA-Fullerton, CA	20				14	0	14	14	0	14
420 - LA-Oxnard, CA	20				16	0	16	12	0	12
424 - LA-Signal Hill, CA	20				14	0	14	12	1	13
428 - LA-Alhambra, CA	20				14	0	14	14	0	14
432 - LA-Corona, CA	20				13	0	13	14	0	14
437 - LA-Northridge, CA	20				15	0	15	15	0	15
441 - LA-Coachella Valle...	20				14	0	14	15	0	15

Commitment Report

The Commitment Report displays event information for one month or up to 1 year for each month of the year.

1. Click on the Commitment Report link.
2. Once the report opens you can change the filters on the left-hand side of the report.
3. To export the report to Excel, click on the on the **Export to Excel** link, click on Download on the pop-up and then click on the Excel report that appears on the bottom of the page.

EXPORT TO EXCEL

Commitment Report by Dept
 From Jan 01, 2020 to Jan 31, 2020 Region(s): Midwest, Northeast, San Diego and 2 more
 Report Run Date: Jan 14, 2020 - Data Last Updated: Jan 14, 2020 7:49 AM EST

Subtotal By Dept												January 2020			
Costco Region	Dept. Name	Costco Vendor #	Vendor Name	Line of Business	Item Number	Item Name	Events Scheduled	Events Billed	Dollars Billed	Total Scheduled	Total Billed	Total Dollars Billed	Total Scheduled		
12-Candy	Midwest	12-Candy	98	Corporate	Product Demo	4809 Protein Bars Chocolate Chip and Bro...	20.0	27.8	\$8,052.95						
						4865 Protein Bar Variety Pack	20.0	27.8	\$8,016.55						
						2369 Almonds Pouch	1.0	3.0	\$654.81						
						7671 Caramel Macadamia Clusters	6.0	30.8	\$12,791.71						
						Total	47.0	89.5	\$29,516.01						
	Midwest	13-Food	98	Corporate	Product Demo	1793 Organic Strawberry Spread	0.0	1.0	\$195.44						
						3499 Sunsweet Dried Plums 56oz	31.0	62.2	\$10,476.42						
						2373 Organic Almond Milk	1.0	1.0	\$149.88						
						8502 Organic Roasted Seaweed Snack	0.0	1.0	\$142.99						
						7213 Organic Dried Mangoes	17.0	74.4	\$14,406.74						
						1070 Chicken Breast	12.5	128.3	\$28,085.47						
						9855 Japanese Green Tea 100 tea bags	12.0	37.0	\$5,720.92						
						9131 Organic Maple Syrup	2.0	31.2	\$6,071.27						
						1793 Organic Strawberry Spread	1.5	1.5	\$299.90						
						3733 Organic 100% Juice Variety Pack	16.0	59.2	\$10,624.84						
						0057 Organic Greens Juice	0.0	1.0	\$203.40						
						Total	93.0	397.8	\$76,377.25						
	Midwest	14-Sundries	98	Corporate	Product Demo	9200 VitaRain Zero - Vitamin Enhanced W...	27.0	66.0	\$10,104.81						
						5934 Alkaline Water	1.0	3.0	\$486.87						
						Total	28.0	69.0	\$10,591.68						
	Midwest	17-Cooler/Refr.	98	Corporate	Product Demo	5240 Organic Hard-Boiled Eggs	14.0	47.0	\$9,571.49						
						2508 Cheese, Fruit and Nut Packs	1.0	0.0							
						3287 Kombucha Ginger Lemonade	20.0	70.7	\$14,114.81						
						8072 Organic Greek Yogurt	0.0	1.0	\$183.23						
						5284 Shredded 4 Cheese Mexican Blend	1.0	0.5	\$92.94						
						Total	36.0	119.2	\$23,962.47						
	Midwest	19-Deli	98	Corporate	Product Demo	7878 Sausage	13.0	23.7	\$5,090.87						

Department Schedule Report

The Department Schedule Report displays the event schedule by department.

1. Click on the Department Schedule Report link.
2. Once the report opens you can change the filters on the left-hand side of the report.
3. To export the report to Excel, click on the on the **Export to Excel** link, click on Download on the pop-up and then click on the Excel report that appears on the bottom of the page.

EXPORT TO EXCEL

Department Schedule Report -
 Region(s): All
 Warehouse(s): All
 From Jan 20, 2020 to Jan 26, 2020 - Data Last Updated: Jan 14, 2020 7:49 AM EST


Costco Region	Event Date	Reschedule Date	Schedule On Date	Department	PO #	Line Of Business	Event Type	Vendor Name	Item #	Item Name	Split Department	Split Vendor	Split Item	Focused Event	Warehouse #
Bay Area	01/20/2020	01/20/2020	01/13/2020	93-Pharmacy		Vendor Performed	Regular	Zipfizz Corporation	1245830	Roadshow zipfizz limited edition flavors				771	
	01/21/2020	01/21/2020	01/13/2020	93-Pharmacy		Vendor Performed	Regular	Betty Lou's, Inc	1174166	Stabilize bar variety pack				471, 661	
						Vendor Performed	Regular	Zipfizz Corporation	1245830	Roadshow zipfizz limited edition flavors				771	
	01/22/2020	01/22/2020	01/13/2020	13-Food		Vendor Performed	Regular	Kermanig Bakery	128331	Focaccia combo variety pack 2pk/16oz				118, 146, 422, 1042	
				93-Pharmacy		Vendor Performed	Regular	Betty Lou's, Inc	1174166	Stabilize bar variety pack				661, 1011	
						Vendor Performed	Regular	Zipfizz Corporation	1245830	Roadshow zipfizz limited edition flavors				771	
	01/23/2020	01/23/2020	01/13/2020	13-Food		Vendor Performed	Regular	Kermanig Bakery	128331	Focaccia combo variety pack 2pk/16oz				118, 146, 422, 1042	
				19-Deli	PRG-1080858	Vendor Performed	Regular	Aidells Sausage Co	106173	Abf chicken apple sausage				025, 029, 132, 143, 482, 663	

Event Status Report

The Event Status Report displays scheduled and billed event information. You can run this report for each type of work order (e.g. product demonstration, special event, roadshow, etc).

1. Click on the Event Status Report link.
2. Once the report opens you can change the filters on the left-hand side of the report.
3. Click on the Cancelled tab on the top left to view the Cancelled demos report.
4. To export the report to Excel, click on the on the **Export to Excel** link, click on Download on the pop-up and then click on the Excel report that appears on the bottom of the page.

EXPORT TO EXCEL
Billed and Scheduled Summary | Billed and Scheduled by Wareh... | Cancelled Summary | Cancelled by Warehouse



The highlighted filters must be selected before data will show

Subtotal By
Dept

Start Date
1/1/2020

End Date
1/31/2020

Line Of Business
(All)

Costco Region
(Multiple values)

Department Class
(All)

Department Number
(All)

CDS or Vendor Performed
CDS Performed

Vendor Name

Item
(All)

Event Status Report - Billed and Scheduled Summary by Dept - From Jan 01, 2020 to Jan 31, 2020
 Region(s): Midwest, Northeast, San Diego and 2 more
 Report Run Date: Jan 14, 2020 - Data Last Updated: Jan 14, 2020 7:49AM EST

Vendor Name	Costco Region	Status	Event Type	Request #	Dept. Name	PO #	Item #	Item Name	Event Count	Labor Charge + Tax	Product Charge + Tax	Supply Charge + Tax	Service Charge + Tax						
Corporate	Midwest	BILLED	Combo	1207648	12-Candy	601223	4809	Protein Bars Chocolate Chip a	27.8	\$3,481.91	\$4,334.31	\$236.72	\$0.00						
		SCHEDULED					4865	Protein Bar Variety Pack	27.8	\$3,481.91	\$4,297.91	\$236.72	\$0.00						
		SCHEDULED	Combo	1207648	12-Candy	601223	4809	Protein Bars Chocolate Chip a											
							4865	Protein Bar Variety Pack											
		SCHEDULED						4809	Protein Bars Chocolate Chip a										
								4865	Protein Bar Variety Pack										
		SCHEDULED						1212918	12-Candy	12129									
								4809	Protein Bars Chocolate Chip a										
		SCHEDULED						1226645	12-Candy	600103									
								4865	Protein Bar Variety Pack										
Southeast	BILLED	Regular	Regular	1237009	12-Candy	350010	2369	Almonds Pouch	3.0	\$375.00	\$254.31	\$25.50	\$0.00						
							2369	Almonds Pouch											
Texas	BILLED	Regular	Regular	1236737	12-Candy	696010	7671	Caramel Macadamia Clusters	30.8	\$3,849.28	\$8,680.78	\$261.65	\$0.00						
							7671	Caramel Macadamia Clusters											
12-Candy									89.5	\$11,188.10	\$17,567.31	\$760.60	\$0.00						
Corporate	Midwest	BILLED	Regular	1212965	13-Food	12129	2373	Organic Almond Milk	1.0	\$125.00	\$16.38	\$8.50	\$0.00						
							1225627	13-Food	601122	8502	Organic Roasted Seaweed Sn.	1.0	\$125.00	\$9.49	\$8.50	\$0.00			
							1230587	13-Food	12305	3499	Sunsweet Dried Plums 56oz	62.2	\$7,776.93	\$2,170.94	\$528.55	\$0.00			
							1231378	13-Food	600103	1793	Organic Strawberry Spread	1.0	\$145.00	\$41.94	\$8.50	\$0.00			
							1232949	13-Food	12329	7213	Organic Dried Mangoes	74.4	\$9,297.42	\$4,477.26	\$632.05	\$0.00			
							1212965	13-Food	12129	2373	Organic Almond Milk								
							1230587	13-Food	12305	3499	Sunsweet Dried Plums 56oz								
							1232949	13-Food	12329	7213	Organic Dried Mangoes								
							Northeast	BILLED	Regular	1228816	13-Food	200112	1070	Chicken Breast	128.3	\$18,559.90	\$8,460.32	\$1,087.75	\$0.00
							San Diego	BILLED	Regular	Regular	1235835	13-Food	9798	9855	Japanese Green Tea 100 tea...	37.0	\$4,625.00	\$770.59	\$314.50