



# QSCC Trading Partner Website User Manual

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## What is the QSCC Supplier Technology Program

The QSCC Supplier Technology Program allows suppliers to access information that can help our partners manage their products within the Wendy's system. Our reporting portal, the QSCC Trading Partner website provides access to just some of the following:

- Distribution center On Hand Inventory
- Distribution center Open Purchase Orders placed back to the supplier
- Distribution center sales to Wendy's restaurants
- Market Pillar information for both US and Canada
- Access to the Wendy's Pricing System

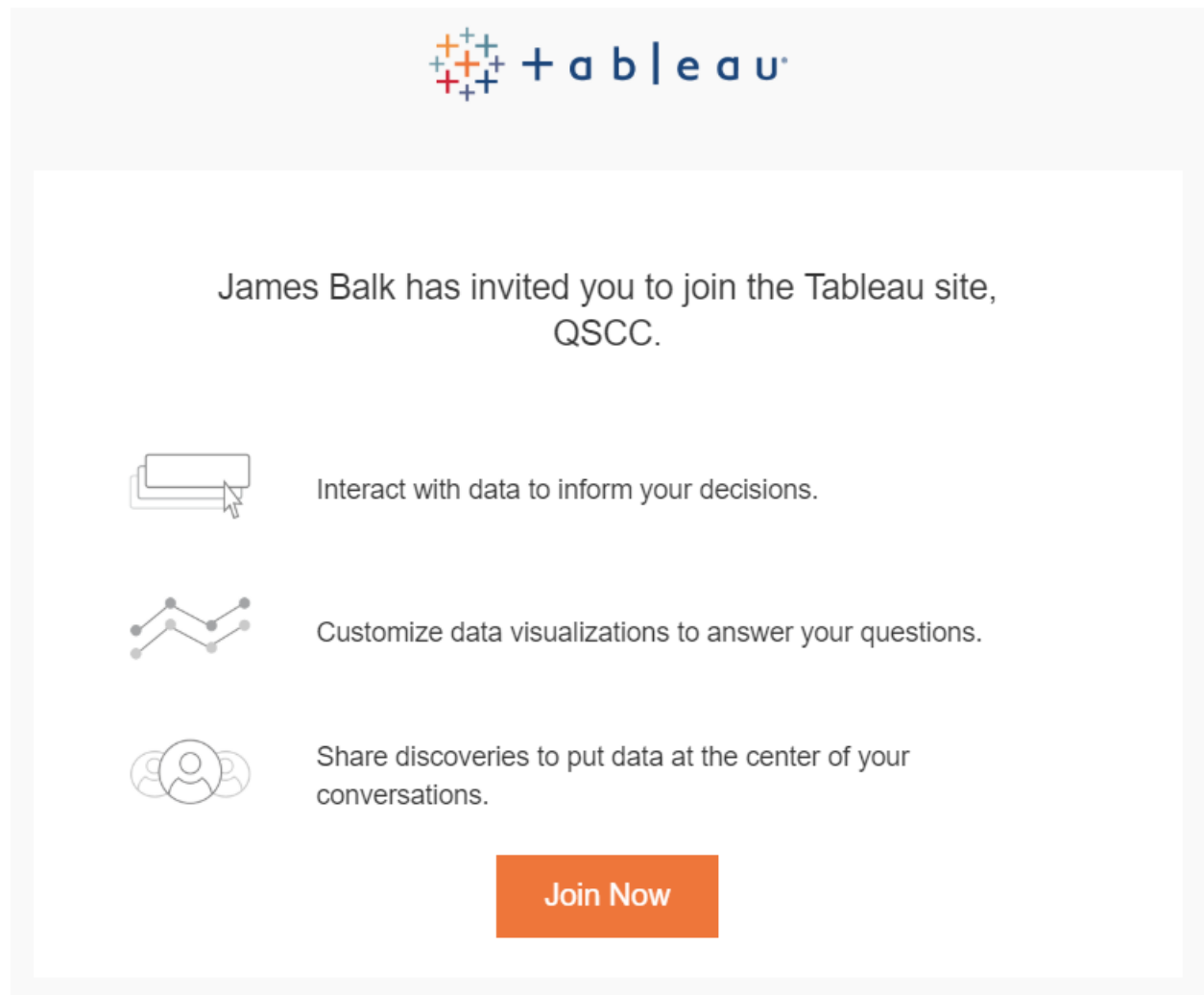
The QSCC Trading Partner website offers rich visualization and customization features that allow our suppliers to filter, save, and subscribe to the reporting they need.

Each supplier receives two user subscriptions for accessing the information through the QSCC Trading Partner website. After a user has been setup, orientation and training are provided by QSCC IT to allow the user to ask questions and provide feedback.

## Getting Started

### QSCC Trading Partner Website – Quick Start Guide

**You're Invited!** You'll receive an email requesting you to "Join Now". Click on the "Join Now" button to get started. Be sure to check your spam and junk mail folders as it is possible that the email did not make it to your inbox. If you still can't find the email invite, please ask your IT Department for help. Let them know that the email comes from [reghelp@online.tableau.com](mailto:reghelp@online.tableau.com) and looks like the image below.



After clicking “Join Now” you are taking to page where you will create your account. Enter your first and last name and then choose a password. Confirm the password and then click “Let’s Go”.

# Create Your Account

## Your Email



## Enter Your Name

First

Last

## Choose a Password

Password

Must be a minimum of 8 characters. At least one letter and number required. Case sensitive. Symbols and spaces are ok.

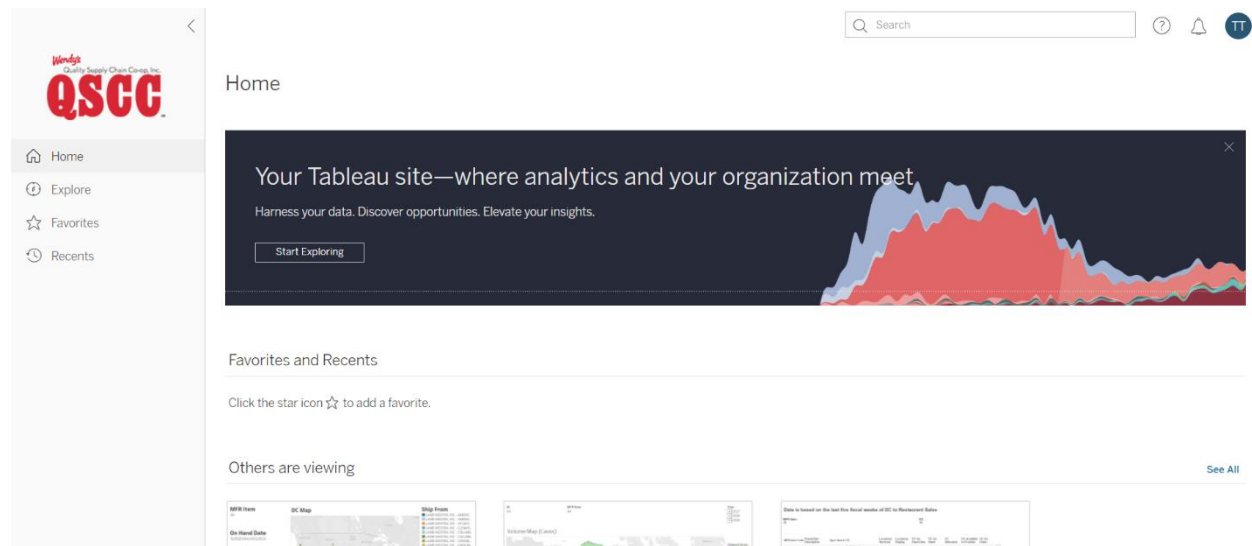
Confirm

[Need Help?](#)

Let's Go

## QSCC Trading Partner Website – User Manual

Next, two things will happen. First you will be taken directly into the QSCC Trading Partner Website. See image below. This is a great time to bookmark the page to make it easy to return to the site later.



Second, you will receive a confirmation email that you have successfully joined Tableau Online. This email will have a “Sign In” button that will take you directly the QSCC Trading Partner Website.

You've Successfully Joined Tableau Online ➤ Inbox x

**Tableau Online** <reghelp@onlinemail.tableau.com>  
to me ▾



You've joined QSCC

[Sign In](#)

[Check out our video tutorials.](#)

### Something didn't work right

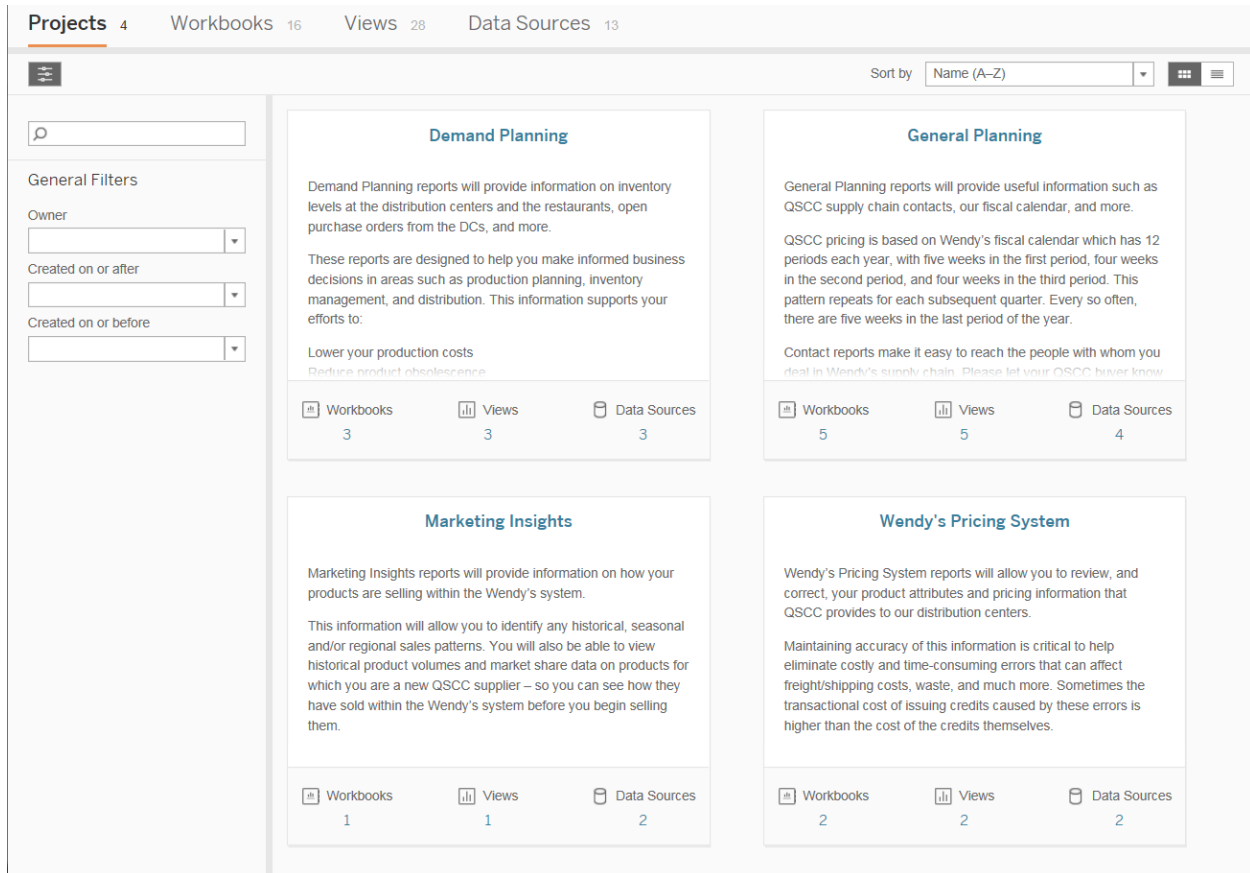
If you're still not getting access to the site, you can get a hold of us in two ways.

Email: [trading.partner@wqsc.com](mailto:trading.partner@wqsc.com) or by Phone: 844-900-RPTS (844-900-7787)

## Getting to Know the QSCC Trading Partner Website

Now that you're set up with a subscription to access QSCC's reporting site, let's get familiar with how to navigate the site. Please make a note, all screen shots and interface directions are PC based. While Tablet & Phone functionality is supported it may look different.

Here's what the home screen looks like:



From the home screen you can see the main report areas that include:

- Demand Planning
- General Planning
- Marketing Insights
- Wendy's Pricing System

### Demand Planning

Demand Planning reports will provide information on inventory levels at the distribution centers, open purchase orders from the DCs, show trends, and more.

These reports are designed to help you make informed business decisions in areas such as production planning, inventory management, and distribution.

### General Planning

General Planning reports will provide useful information such as QSCC supply chain contacts, our fiscal calendar, GS1-128 supplier compliance scorecard, and more.

### Marketing Insights

Marketing Insights reports will provide information on how your products are selling within the Wendy's system. This information will allow you to identify any historical, seasonal and/or regional sales patterns. You will also be able to view historical product volumes and market share data on products for which you are a new QSCC supplier – so you can see how they have sold within the Wendy's system before you begin selling them.

### Wendy's Pricing System

Wendy's Pricing System reports will allow you to review your product attributes and pricing information that QSCC provides to our distribution centers.

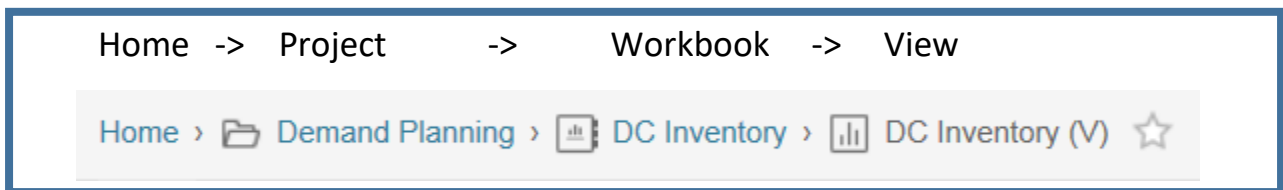
Maintaining accuracy of this information is critical to help eliminate costly and time-consuming errors that can affect freight/shipping costs, waste, and much more. Sometimes the transactional cost of issuing credits caused by these errors is higher than the cost of the credits themselves.



## Report Organization

In the QSCC Trading Partner website, reports are organized under the following report hierarchy:

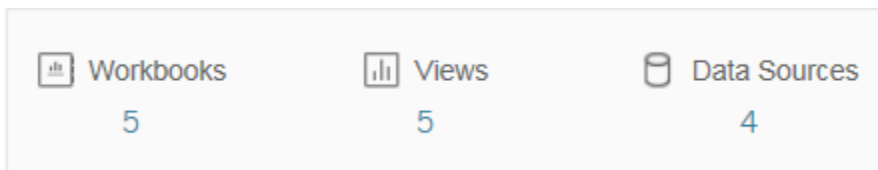
- Projects – a project is a defined Reporting Area, that currently includes Demand Planning, General Planning, Marketing Insights, and Wendy’s Pricing System
- Workbooks – a Workbook is like a folder grouping similar reports that are contained within a Project
- Views – are the actual viewable reports in the system contained within a Workbook



So following the pathway seen above; **Home** is where we started, **Demand Planning** is a Project, **DC Inventory** is one of the Workbooks, and **DC Inventory (V)** is one of the views of the Workbook it belongs to.

Notice that as you navigate from Home toward a report, a trail is left behind showing the pathway. So if you want to back out, you can click along that pathway to ascend back to a higher level.

Now that you know about Worksheets and Views, you probably noticed each of the report areas (or Projects) has a summary of contents. So in the example below, there are 5 Workbooks and 5 Views within this Project.



You don’t need to worry about Data Sources. That’s a listing of what tables the information is pulling from.

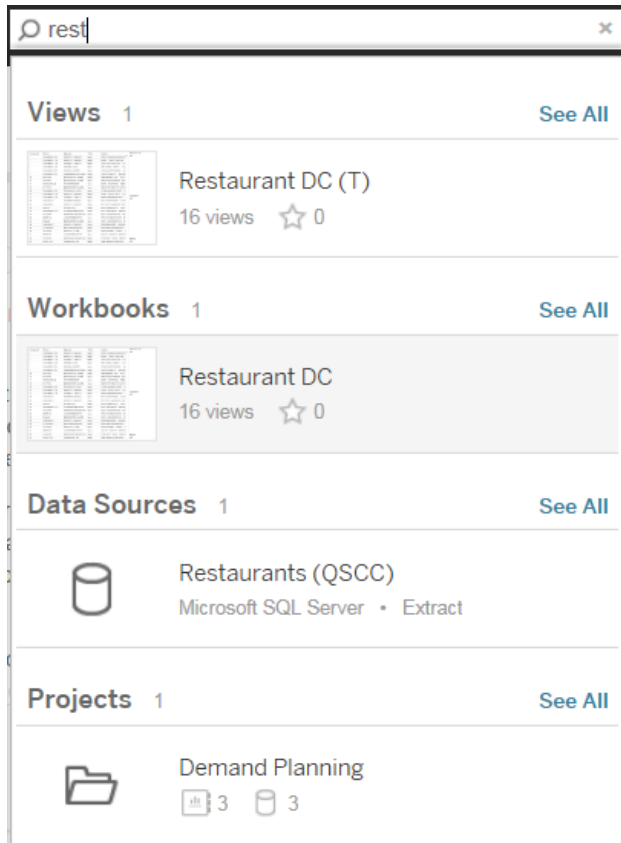
## Searching for a Report

What if you want to look for a report, but are unsure where it may be located...

What if you know the report has something about “restaurant” in the title...

### Global Search

Located at the top of the website, is a search box with a magnifying glass that will search for the text you typed across **all** Projects. The Global search provides immediate search results as you type.



### Project Search

Located at the left of the website, is a search box with a magnifying glass that will search for the text you typed across the **current** Project. The Project search provides results when you press Enter.

## Report Interaction

Many of the reports in QSCC Trading Partner website can be filtered by the user. Some reports come with search boxes, drop-down boxes, radio buttons, slide controls, and more. Other reports can be filtered by clicking directly on the report information. The QSCC Trading Partner website is designed to be tablet-friendly, and therefore does not support right-clicking.

### Hover, Left Click, Hover

The best way to interact with the information is to **Hover, Left Click, Hover**.

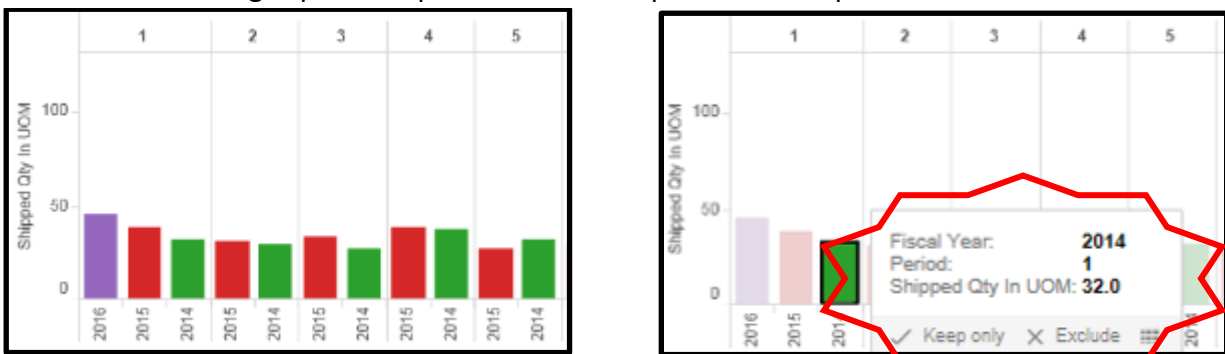
Try hovering over a part of a report to see if more options appear. If an option to sort or filter is available, options will reveal themselves. To select an option, simply Left Click.

The picture on the left is part of a graph. Hovering over it makes this filtering tool appear!



Try Left Clicking on a piece of information. All other information will filter out, and if you continue to hover over the selected piece of information, more options for drilling into that information will reveal itself. If you want to back out, Left Click on that selected information a second time and all other information will fade back in. Alternatively, left clicking in an open area of the report will allow all other information to fade back in.

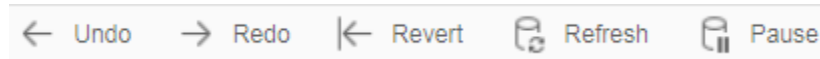
The picture on the left are bars of a chart. Clicking on one of the bars highlights it. Continuing to hover over it brings up more options to dive deeper into that specific information!



Here's a tip: Hold down Ctrl while clicking to select/unselect an additional row of information. Also, holding down Shift while clicking two records will select all information between the two records.

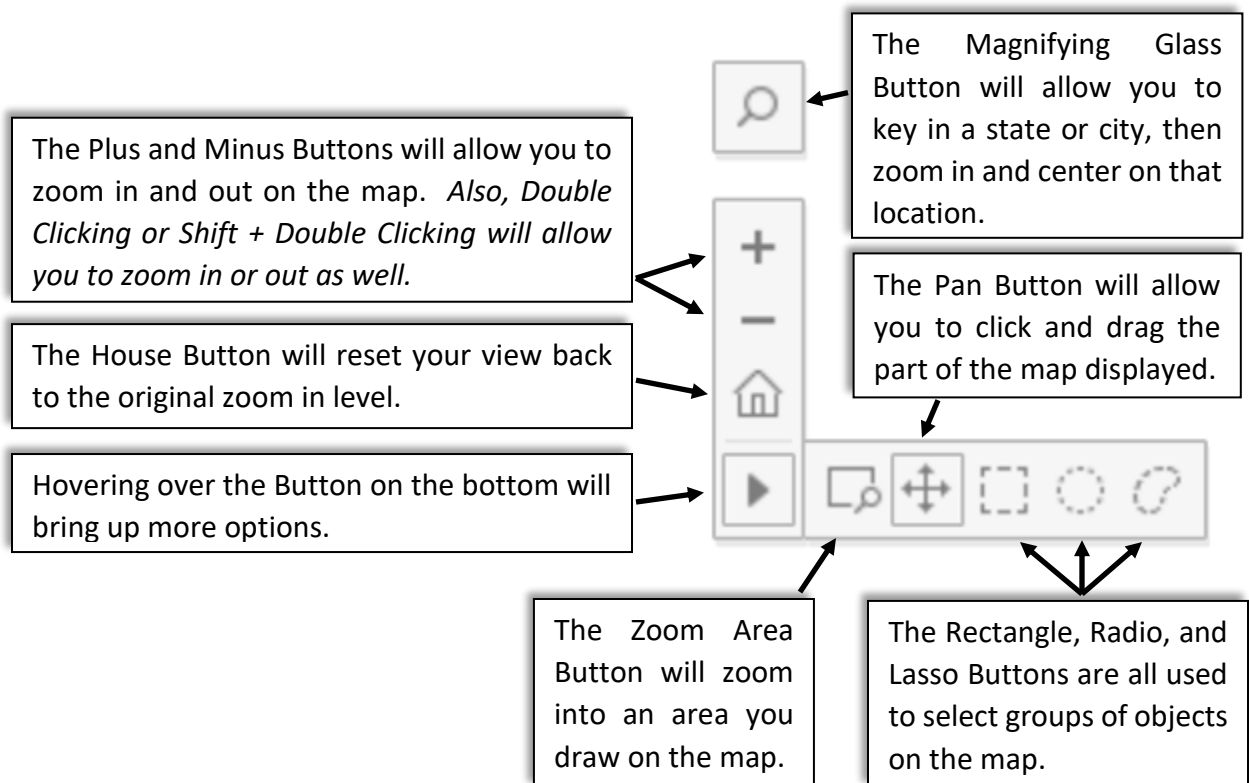
## Removing Report Filters or Selections

Located at the top of the report are controls to allow the end user to easily remove report filters and selections. 'Undo' goes back one step, 'Revert' takes you back to the full set of information the report started with. Refresh and Pause options are currently not applicable in the QSCC Trading Partner website.



## Navigating the Map (Visual Reports)

If you are viewing a Visual report with a map, you'll see the image below in the upper left-hand corner of the map. Review these buttons for an explanation on how to interact with the map.



Here's a tip: Remember how Holding down Ctrl while clicking on records in a tabular report allowed you to choose multiple records? It's the same with interacting with the map on Visual reports too.

## Different Types of Reports

There are three different reports on the Website. They are:

(S) – Static

(T) – Tabular

(V) – Visual

We will use the (S), (T), (V) suffix on the end of all report names to help you identify what kind of report you're dealing with when browsing through the content of the Workbooks.

**Static reports** contain information that is fixed. You can't manipulate the information, but it is an easy way for us to communicate commonly sought information, such as business calendars.

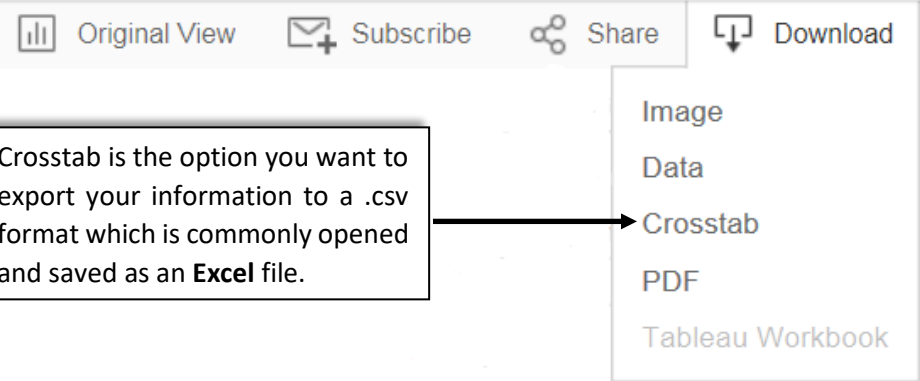
**Tabular reports** contain rows and columns of information that you can interact with. Often these reports best support a supplier's need to export information for import into their own reporting models. Earlier we discussed how some reports come with filters and the ability to 'hover, left click, hover' in order to view more information.

**Visual reports** employ interactive graphs, charts, and maps to represent key relationships in information. The data visualization capabilities of the QSCC Trading Partner website, allow for complex relationships to be modeled and understood. Visual reports come with the ability to select and filter the information to drill-down further into relationships for understanding. Visual reports provide the ability for the end user to extract the actual visualization image to address supplier reporting needs.

## Exporting Information to Excel (Tabular and Visual)

Visually representing the information is great, but what if you just want raw information?

Some reports allow you to pull raw information from the entire report by clicking on the 'Download' button in the upper right-hand part of the screen.



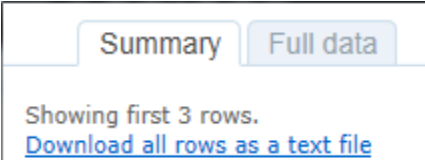
Crosstab is the option you want to export your information to a .csv format which is commonly opened and saved as an **Excel** file.

The screenshot shows a toolbar with buttons for 'Original View', 'Subscribe', 'Share', and 'Download'. The 'Download' dropdown menu is open, showing options: 'Image', 'Data', 'Crosstab', 'PDF', and 'Tableau Workbook'. An arrow points from the text box to the 'Crosstab' option.

Other reports will allow you to drill down and export filtered pieces of information. In the case of the screen shot below, three records were selected, the records were hovered over, and the option to view their information became visible with the icon at the right.

Brand Item Description	Pack Qty	Pack Size	Pack Size UOM	Supplier Item #
CL HANDS FREE HAND SOAP	8	1.0000	EACH	1112079
CL HAND SOAP FOAM	6	1.0000	EACH	1111723
CL HAND SOAP LIQU				
CL HAND SOAP LIQU				
CL HAND SOAP FOAM NAM	4	32.0000	OUNCE	1110294
CL HAND SOAP FOAM NAM	4	32.0000	OUNCE	1110209

The screenshot shows a table with several rows. Three rows are highlighted in blue. A context menu is open over the highlighted rows, showing options: 'Keep only', 'Exclude', and 'View Data'. A yellow circle highlights the 'View Data' icon.



Clicking on 'View Data' will open a new window where you'll see a summary of the highlighted information and this image in the upper left-hand corner. Clicking on 'Download all rows as a text file', will export these records of the report as a .csv format which is commonly opened and saved as an **Excel** file.

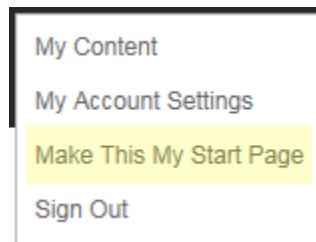
The screenshot shows a toolbar with buttons for 'Summary' and 'Full data'. Below the buttons, it says 'Showing first 3 rows.' and there is a link for 'Download all rows as a text file'.

## Leveraging Tableau to Work FOR You

There are tools within Tableau that allow you to customize and automate reports. Try to leverage these features whenever possible and save yourself a lot of time.

### Setting a Start Page


The first thing you will see when logging into the QSCC Trading Partner Website is a list of all Views. This may be a good place for you to start every time you log in however, if you have a more ideal place you'd like to start you can easily set a new Start Page. Just navigate to the page you'd rather see when first logging in and click on the User's name in the upper right corner of the website.



Click on 'Make This My Start Page' and the website will always start you on this page.

## Modifying and Saving Views to Default

Often, you may find a report in its original state is overly broad and gives you too much information. You can filter the information down, then save those applied filters as your own custom view named however you choose. Now, when you want to recall your version of the report, it's ready to run. Or, even better, if it's been set as the default report, it's the first one you see every time. All these options are available to you by clicking on the 'Original View' Button while you're in a report.

 Original View

---

Make it my default     Make it public


---

**My Views**


*Nothing saved yet*

---

**Other Views**

 Original View (default)	<i>James Balk</i>
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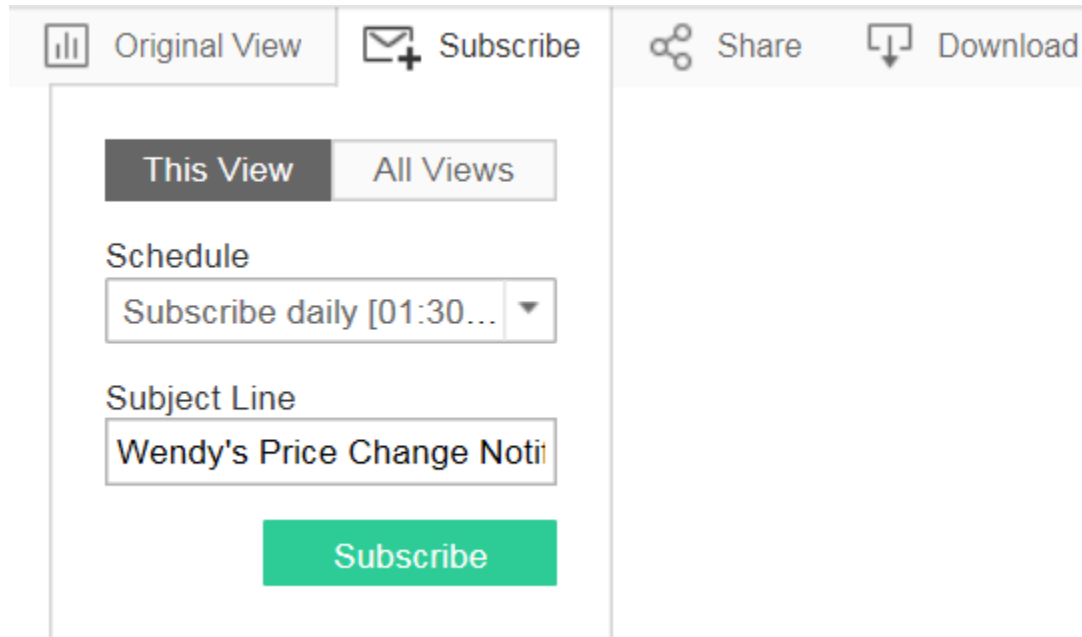
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 Manage



## Subscriptions

Is there a report you need to see daily or at some regular interval? Try setting up a subscription to have the report automatically emailed to you. To set this up, run the report you're interested in and click on the Subscribe Icon. Select the report and frequency you would like. The Subject Line of the email can be edited too, if you find that helpful.

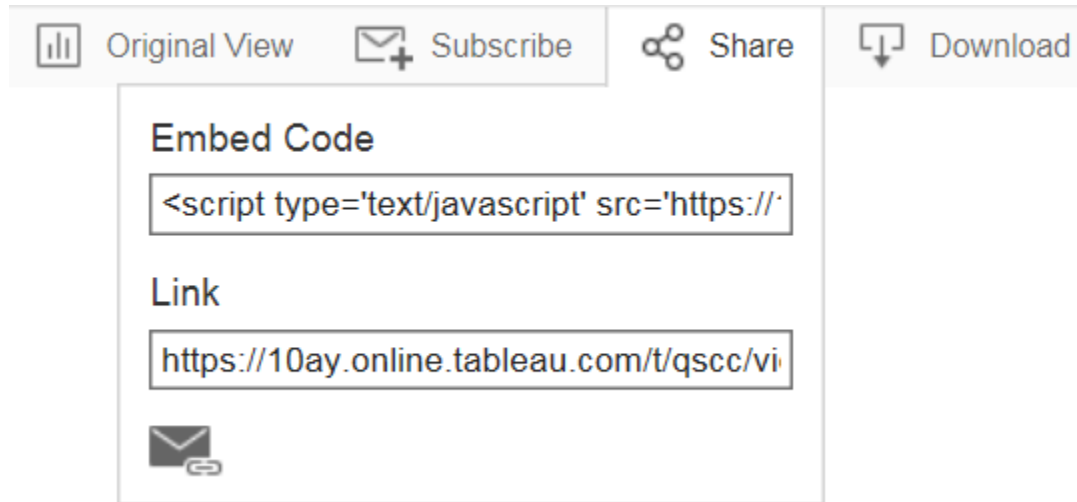


The screenshot shows a user interface for setting up a subscription. At the top, there are four buttons: 'Original View' (with a bar chart icon), 'Subscribe' (with an envelope icon), 'Share' (with a share icon), and 'Download' (with a download icon). Below these, there are two tabs: 'This View' (selected) and 'All Views'. Under the 'This View' tab, there is a 'Schedule' section with a dropdown menu set to 'Subscribe daily [01:30...'. Below that is a 'Subject Line' section with a text input field containing 'Wendy's Price Change Noti'. At the bottom of the form is a green 'Subscribe' button.

Here's a tip: Did you set up the wrong interval or maybe the report no longer needs to be automated? Click on your name in the upper right-hand corner. Click on 'My Content' and then Subscriptions. From here, you can find the subscription and make changes or delete the subscription altogether.

## Sharing

Did you customize a report that you want to share with someone else? By clicking on the Share Icon, you are shown a link to that report and can pass it along to another **Tableau User** to view. What's really interesting about this feature is that you're not emailing the other User a screen shot. You're sending the actual report view, filters and all, to them.



If you want to send the report to **someone who doesn't have a Tableau login**, you'll have to capture and email a screen shot. Under the Download icon at the top of the website are options for exporting your report as an 'Image' or 'PDF'. By exporting a report in either of these ways, you can attach the image or PDF to an email and share it with someone.

As an additional alternative, many computers have a Print Screen or "PrntScrn" key that will allow you to capture whatever is on your screen as an image and save it to a clipboard. From there, you can paste the image into an email or other document.

## Favorites

Have you found that you're regularly running a handful of reports while ignoring most others? You may want to add the most often used reports to your Favorites list. Wherever you see an empty star by a reports name (☆), click on it to add it to your list of favorites.

This report not one of your favorites anymore? Just click the gold star (★) by the Report's name to toggle the favorite designation off.

You can view and search all your favorite reports by Clicking on the Star located along the top of the screen by your name.

## A Note about Tablet Versions

All the images captured and interactive directions in this User Manual are from the perspective of someone using a PC. It is important to note the QSCC Trading Partner Website supports mobile devices. While all the reports will be available on a mobile device, they may look slightly different on your screen. Interacting with reports will also be possible, though much of the 'hover, left click, hover' methods of filtering and drilling down into the data will be replaced with simply tapping on the screen and responding to any options that are available.