



**POLANER**  
SELECTIONS  
OPEN YOUR MIND & TASTE

November 14, 2011

## **POLANER SELECTIONS**

### **COMPANY PROCEDURES AND SALES STAFF GUIDELINES**

#### **I. COMMUNICATION**

##### **a. Interoffice Communication**

Our primary method of communication is e-mail. Polaner Selections requires that all salespeople check their email regularly throughout the day. Polaner Selections uses Microsoft Exchange as the operating software to access e-mail.

All salespeople must have a cell phone. The office should be able to contact all salespeople throughout the day. Please return messages from the office promptly.

##### **b. Computer Requirements**

Polaner Selections will provide all salespeople with a NetBook computer with internet access and Windows compatible versions of Word, Excel and Outlook. Adobe Acrobat Reader will be available to open .pdf formatted files. Employees may not download or make changes to their NetBook computers unless authorized to do so by the IT Department.

#### **II. ORDER ENTRY**

##### **a. Placing Orders**

We recommend that new orders for next day delivery be placed using your NetBook computers. However, all add-ons must be phoned in to the order department.

##### **b. Order Deadline**

All sales orders via NetBook computer must be sent by 3:40PM for next day delivery. All orders after 3:40 must be called in to the order board. Cutoff is 3:45 for all orders shipping the next day. Same Day Picks and Late orders are subject to approval by the Operations Manager and may be assessed a \$10 fee.



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**c. Order Minimums**

Due to delivery costs related to each order, Polaner Selections has established a 3cs or \$300/order minimum. A \$15 ship charge will be added to invoices for orders that do not meet these minimums.

**d. Split Case Charge**

There is no bottle fee to split a case.

**e. Inventory Clearance Sales**

Items on any clearance list are on a first come, first served basis. These items *cannot* be put on retail or restaurant hold. These sales are final and cannot be returned or credited.

**f. Restaurant and Retail Holds**

All hold requests must first be reviewed by your manager and submitted via Indigo Olive as a master order. A Brand Manager will review and if approved, the order will remain in the system. If denied, you will be notified.

**III. SAMPLE POLICY**

**a. Sample Orders**

All sample orders must be e-mailed on a sample order form, which includes the delivery location, ship date, quantities, item codes, vintages, and item descriptions. **You must select one day a week to receive your sample order. The request must be approved by the sales manager by 9:30am and submitted to the order board by 11:30am for the following delivery day. Exceptions are reviewed by Customer Service.** All sample requests must be sent to [orders@polanerselections.com](mailto:orders@polanerselections.com) with a copy to the sales manager for approval. **Please try and order samples in full case increments to minimize cost.**

**b. Sample Usage**

When samples are taken out in the market place, each bottle must have a sticker adhered to it that reads, "Samples for analysis, not for resale." These stickers are available at the office and can be sent to you once depleted.

Sample orders will be deducted from sample budgets. Monthly sample statements will be distributed to all salespeople.



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**c. Samples for In-store Tastings**

Polaner Selections will support 1 bottle per item for each store tasting unless quality is an issue. Polaner Selections will support a maximum of 6 wines per tasting with the exception of tastings where a supplier is present. Samples pulled for in-store and restaurant tastings will be debited from sample budgets.

**d. Replacing Bottles for Retail/Restaurant Tastings**

Polaner Selections will not issue credits for bottles used for in store tastings. The same applies for staff tastings for restaurants. These sample bottles must be provided by the salesperson who must be present at the time of the tasting. The retailer may be provided with two unopened bottles of wine which they have not purchased within the prior twelve months. This is for the retailer to “taste staff members and acquaint them with the taste and quality of a product”.

**e. Charity tastings**

Polaner Selections will on occasion, donate to a bon-a-fide charitable group that benefits specifically children’s organizations. These charitable donations are to be submitted via email to Tina Fischer with the proper paperwork from the charitable organization and include the DPS Salesman Wine Donation Request form located in the *Living Room*. The request will be reviewed by Tina Fischer and you will be notified of the decision and the instructions on how to proceed if approved.

**IV. EXPENSES**

**a. Monthly Expense Reimbursement**

To be reimbursed for monthly expenses, employees must fill out and sign an expense reimbursement form. Receipts for all expenses except mileage must be attached to the form. Expenses will not be processed if the reimbursement form is not used.

Expense forms must be submitted by the 10<sup>th</sup> of the following month in order to be reimbursed for the previous month. All expense forms *received after the 10<sup>th</sup>* will not be reimbursed the following month but the month after. If an expense form is two months late, those expenses will not be reimbursed.

**b. Expense Categories**

**i. Meals & Entertainment**



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These are to be listed in detail on the Explanation of Entertainment Expense Form, including the name, association and business purpose of the meeting. Example: *Lunch with xyz, wine buyer at 21 Club, discussed wine list.*

Polaner Selections does not reimburse meal and entertainment expenses for employee meetings with each other. Personal meals are not reimbursable. Any meal and entertainment expense exceeding \$250 must be approved *in advance* by management.

### **ii. Samples**

Polaner Selections does not reimburse for the purchase of samples.

### **iii. Telephone**

Polaner Selections does not reimburse for a home telephone line.

### **iv. Cell Phone**

The IRS allows a reimbursement of 100% for cell phone use. The total monthly cell phone bill cannot exceed \$200.00

### **v. Mileage Reimbursement**

The IRS requires that written records be maintained to document the business use of vehicles. For each month, please provide the beginning and ending mileage on your car odometer. Estimate the business use of miles driven for that month. Follow the rest of the calculation on the expense form to compute the amount you are eligible to be reimbursed for mileage for that month. Polaner Selections requires employees requesting reimbursement for mileage sign an Employee Representation Regarding Use of Company Vehicle Form.

## **V. CUSTOMER CREDITS**

As per the NY SLA & NJ ABC, credits for breakage, damaged and spoiled wine can only be issued within the credit cycle of purchase (14 days in NY, 30 days in NJ). Salesmen must go to the account and view the spoiled bottle of wine. If the account does not have the bottle of wine, we cannot issue a credit. If the wholesale value of the bottle of wine is over \$25, we require that the salesman physically bring the bottle to the office to process the credit. All credits are subject to approval by the office.

Credits for pricing errors will be processed within 2 business days.

Credits for unsalables will be processed within a 2 week period unless there is an issue.

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All credits will be emailed to the customer and the rep will be copied on the email. A hard copy will be mailed if we do not have an email address.

## **VI. CUSTOMER PICK UPS**

Order entry errors, mis-picks and delivery errors must be reported immediately to the Customer Service team. This allows Polaner Selections to take immediate action to correct the issue. Customers should check their shipments thoroughly upon receipt for accuracy and the condition of the wine. If there is an issue, they may refuse the wine stating the problem and simply return it with the driver.

If an error is noticed after delivery it is the responsibility of the customer to notify the salesperson or the office immediately. Polaner Selections does not take responsibility for damaged or missing wine that is noticed more than a week from the delivery date.

Credits for delivery issues and pick ups will be processed as quickly as possible once the wine is inbound to FDL, generally 1 week (2 weeks for DNT returns) unless there is an issue.

## **VII. NEW ACCOUNTS**

Every new account must fill out a new account application and resale certificate. The completed form must be sent to the office with a copy of a valid license/permit. Polaner Selections requires **2 business days** to process a credit check on any new account. Credit terms and credit limit are subject to review and approval by the credit department. The maximum credit terms a customer can receive is Net 30.

## **VIII. COLLECTION**

### **a. Aging Reports**

All sales representatives will receive daily aging reports which detailed past due activity on their accounts. Periodically, Polaner Selections will request your help in collecting payment from an account. Such requests will be noted on the collections report and asked via telephone or email. Your help in notifying management of any financial difficulties with an account is greatly appreciated.



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**It is management's discretion to hold an order if they are past due in payment or have exceeded their credit limit.**

**b. Reversal of Commission on Past Due Accounts**

Once an account is listed as delinquent with the state, we send reminder letters to past due customers of their delinquencies at 30-60-90 day intervals. After 90 days, Polaner Selections will reverse the salesperson's commission on invoices that are still past due and then we will send to collections. If Polaner Selections is subsequently paid, commissions will not be re-instated.

**IX. CONDUCT AT TASTINGS AND SALES MEETINGS**

**a. Company Tastings**

i. Polaner Selections employees will be asked to assist in setting up and managing tables at Tastings. When assigned to a table, it is the employee's responsibility to keep the table clean and orderly. At no time are bottles to be taken from the table and brought to customers.

ii. Please pour customers "tastes" of wine, a ½ oz pour. There is a limited number of bottles at the tastings.

**b. Sales Meetings**

i. Attendance is mandatory at all Polaner Selections Sales Meetings; requests for exceptions must be submitted in writing to the sales manager. Unless otherwise noted, sales meetings will be held at our office in Mount Kisco, NY. Polaner Selections Salespeople are required to arrive at least 10 minute before the sales meeting is to begin.

ii. Cell phones are to be *turned off* for the duration of all Polaner Selections' Sales Meetings.

**X. SUPPLIER CORRESPONDANCE**

**a. Supplier Contact**

Polaner Selections requests that salespeople do not call, fax or e-mail our suppliers regarding company-related issues. All supplier correspondence must be directed through the Polaner Selections' office.

**b. Winery Visits**

Please e-mail the Brand Coordinator regarding winery visits. They need a minimum of 2 weeks notice to coordinate any visit and the following information must be provided

1. name of person(s) requesting visit and the account they represent

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2. preferred time of visit
3. the name and number of the hotel where they will be staying in during their visit

Not all wineries accept visitors. Please inform your customers that Polaner Selections will confirm all requests as soon as possible. Winery visits will not be scheduled for consumers or during harvest, usually September through November.