



POLANER
SELECTIONS
OPEN YOUR MIND & TASTE

5.2023

POLANER SELECTIONS

PROCEDURES AND SALES STAFF GUIDELINES

1. ORDER ENTRY

a. Placing Orders

- All orders for customers can be placed into the Polaner system through the sales portal.
- There are 3 order types – sales orders/master orders/backorders.
- Sales orders ship as normal and cannot be held beyond 30 days of the original date.
- Backorders are holds on incoming goods (held for 1 weeks at time of receipt).

b. Master Order (MO) Hold Requests

- Wine can be held for customers using a Master Order (held for 1 week – exceptions made for BTG, contact Brand Manager).
- All Master Orders can be placed into the Polaner system through the sales portal.
- Any Master Orders for 10 or more cases must have Brand Management approval prior to processing the MO through the sales portal.
- All Master Orders are subject to approval by the brand management team.

c. Request for available inventory

- Please contact your sales manager or appropriate brand manager for requests for inventory that is being held.

d. Order Deadline

- Cutoff is 4:10PM for next day deliveries (we submit orders for processing at 12pm, 2pm & 4:20pm)
- Same Day Picks and Late orders are subject to approval by the Operations Manager and may be assessed a \$25fee. FDL does not accept orders after 5pm FIRM!

e. There is no split case fee, however there is a \$15 minimum for orders under 3cs or \$300 (4cs and \$400 upstate). Anything under 1cs or \$100 will be assessed a \$30 fee.



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2. SAMPLE POLICY

a. Sample Orders – Cutoff is at 1pm

- All sample orders must be processed through the portal and should list the account tasting.
- The management team will review and suggest any changes/substitutions.
- Your samples requests should be balanced between:
 - a) wines that your customers have specifically requested to taste.
 - b) wines that you think your customers will be interested in tasting.
 - c) wines the brand management team needs you to focus on to achieve the company goals.

b. Sample Usage

- All samples must have sample stickers adhered to them when working in the market.
- Sample stickers are available from the office.
- The sample sticker template is available in the living room.

c. Samples for In-store Tastings

- Polaner Selections supports 1 bottle per item per tasting.
- Polaner Selections supports a maximum of 6 wines per tasting.

d. Replacing Bottles for Retail/Restaurant Tastings

- All wines for in-store tastings or staff tastings should be pulled as normal samples.

e. Charity tastings

- Polaner Selections charitable giving policy is to donate to groups that benefit children's organizations.
- Please discuss all charity requests with your manager before submitting to Tina Fischer for final approval
- All donation requests must be submitted via email using the charitable donation request form found in the living room.



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3. EXPENSES

a. Monthly Expense Reimbursement (Sales Representatives)

- In order to be reimbursed for monthly expenses, you must fill out an expense report through the Expense Point App and include receipts for all expenses except mileage.
- Expense reports must be submitted through the App by the 5th of the month in order to be reimbursed for the previous month.
- All expense reports *received after the 5th* will not be reimbursed until the following month.
- Expense reports that are late two consecutive months in a row will not be reimbursed.

b. Expense Categories

- **Samples** - Polaner Selections does not reimburse for the purchase of samples.
- **Telephone** - Polaner Selections does not reimburse for a home telephone line.
- **Cell Phone** - The IRS allows a reimbursement of 100% for cell phone use. *Polaner has capped this reimbursement at \$100.*
- **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.

4. CUSTOMER CREDITS

- Credits for breakage, damaged and spoiled wine must be submitted via the portal.
- We will provide credits for pick-ups and unsalable wine within a reasonable time frame.
- Contact the brand manager if there is a consistent issue with a wine that might need evaluation for quality.

5. NEW ACCOUNTS

- All new accounts are required to fill out a new account application and resale certificate.
- These are available on Provi/Seven Fifty or we can send to the customer via DocuSign (contact Customer Service with the prospective client's email address).
- Credit terms and credit limits are subject to review and approval by the credit department.
- The maximum credit terms a customer can receive is Net 30.



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6. COLLECTION

a. Aging Reports

- All sales representatives will receive daily aging reports which detail past due activity on their accounts.
- Polaner Selections will request your help in collecting payment from an account periodically.
- Your help in notifying management of any financial difficulties with an account is greatly appreciated.

b. Reversal of Commission on Past Due Accounts

- Delinquent accounts are emailed regarding past dues by the Credit Department.
- If the company has not been paid after 90 days, the salesperson's commission is reversed on invoices that are over 90 days past due.
- If an account closes with a balance on the account, commissions may be reversed before 90 days if the account cannot pay.

7. SUPPLIER CORRESPONDANCE

- Polaner Selections requests that all supplier correspondence be directed through the brand management team or owners.