

OMNIA PARTNERS | CONNECT

USER GUIDE: PUBLIC SECTOR SUPPLIER PARTNERS

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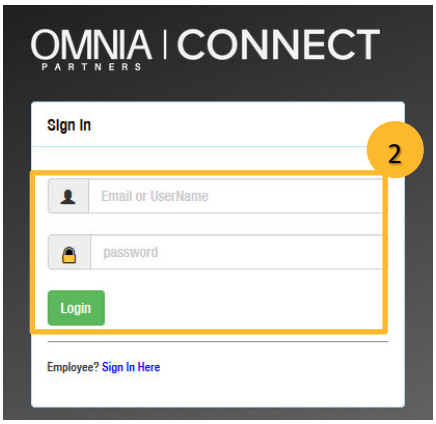
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Accessing OMNIA Partners Connect

Overview

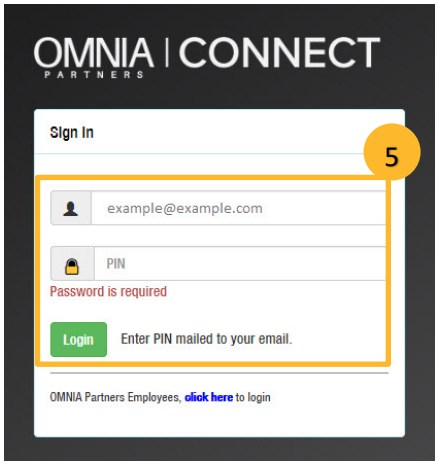
OMNIA Partners Connect is a reporting tool intended to enhance your path to sales by providing OMNIA Partners data and reports relating to program sales for your contract(s) and information on prospective customers. Users are will login with either Password Access or PIN Access.

Login



Password Access

1. **Go to https://omniaconnect.omniapartners.com/**
2. On the login screen **enter your user name and password** and **click LOGIN**.



PIN Access

1. **Go to https://omniaconnect.omniapartners.com/**
2. On the login screen **enter your user name.**
3. An email will be sent to you with your PIN.
4. A new option will appear for you to enter a PIN.
5. **Enter your PIN** and **click LOGIN.**

Questions

If you do not have an account, **contact your designated Partner Administrator** to have one created for you. If you do not know your Partner Administrator, contact connectsupport@omniapartners.com.

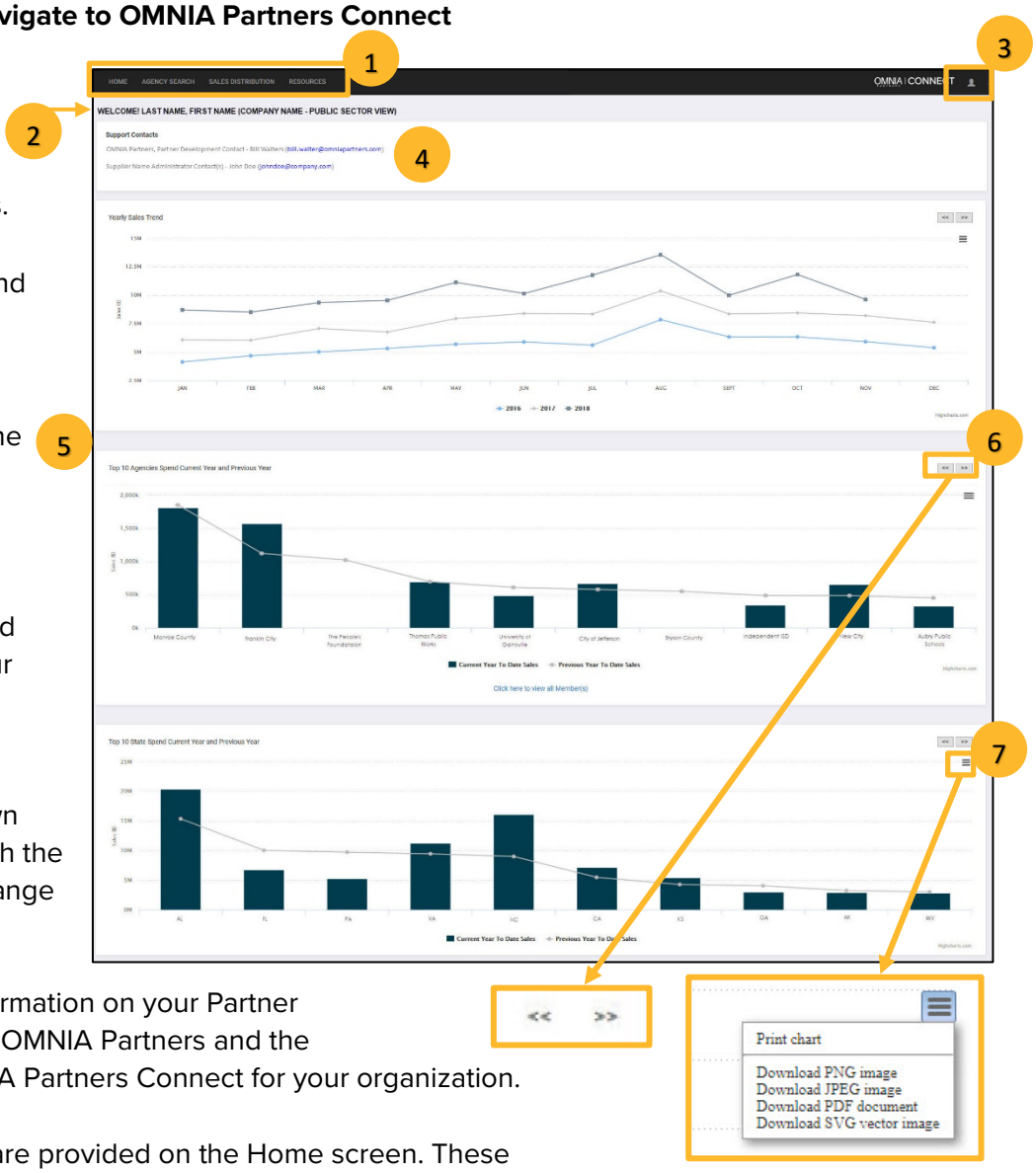
If you have any questions regarding OMNIA Partners Connect, please contact connectsupport@omniapartners.com or your Partner Administrator.

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Home and Menu

Note: Depending on your user profile, the information, data, and reports displayed may vary from the screenshots shown in this User Guide. If you would like to update your user profile, please contact your Partner Administrator.

1. **Use the top menu to navigate to OMNIA Partners Connect**
   - **Agency Search** – Search for **agencies** who are using your contract(s) and/or prospective customers.
   - **Sales Distribution** – View YTD agency spend by state, by agency type, and by individual agencies.
   - **Resources** – Access the user guide.
   - **Log Out**



2. A welcome message is included on all pages and provides your name, your organization's name and your view access level.

3. **User Setting** – Dropdown menu provides users with the ability to Edit Profile, Change Password, and Log Out.

4. **Support Contacts** – Information on your Partner Development contact at OMNIA Partners and the administrator(s) of OMNIA Partners Connect for your organization.

5. Three standard reports are provided on the Home screen. These reports provide overall sales information for your contract(s).

6. In each report **click the Scroll Buttons** to change between a graph and chart view.

7. To download or print a report from the Home screen **click the Download and Print button.**

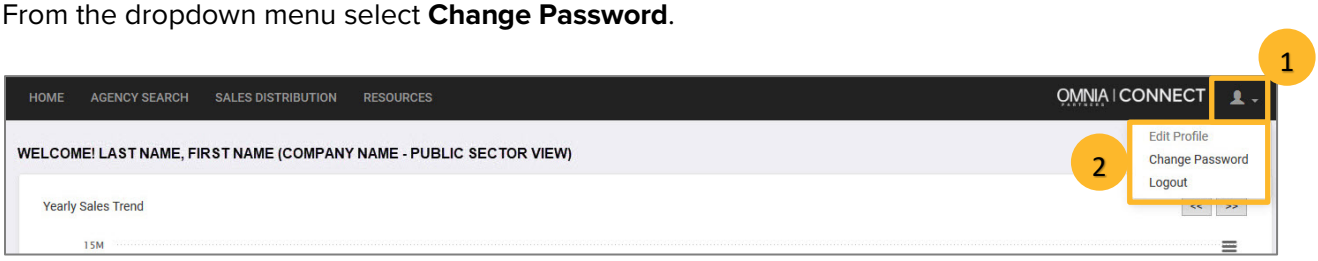
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Change Password

Users can set their own password.

1. From the top menu navigation **click on the user image**. This will open a dropdown menu.

2. From the dropdown menu select **Change Password**.

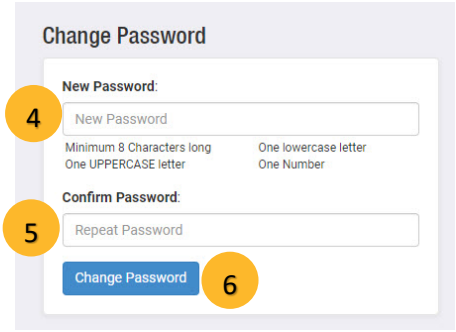


3. A new window will open.

4. **Enter your new password**. Passwords must follow these requirements:
    a. Minimum 8 Characters Long
    b. One UPPERCASE Letter
    c. One lowercase letter
    d. One Number

5. **Reenter your new password**.

6. **Click Change Password**.

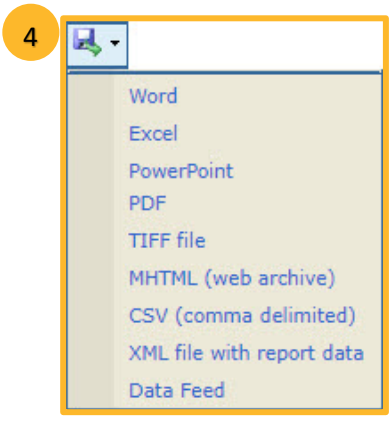


Report Navigation & Exporting Tools

At the top each report, you will see a navigation bar with various helpful tools.



1. **Page Scroll** allows you to scroll through all pages in a report.
2. **Back** takes you back to the previous screen.
3. **Search** allows you to search for keywords in a report.
4. **Export** provides a menu of export options for a report.
5. **Refresh** allows you to refresh the information in real time with the OMNIA Partners database.



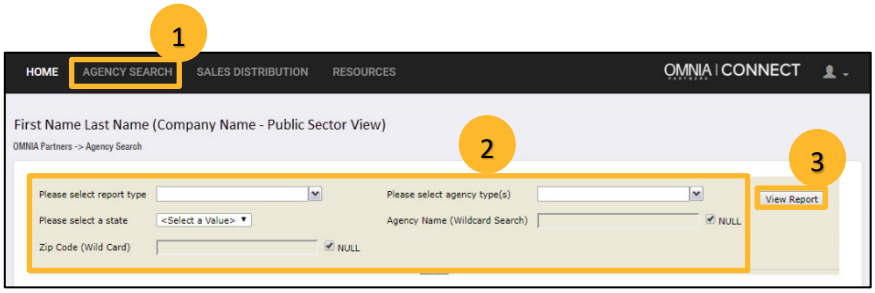
Tip: *Do not click the back button in your browser. This will take you to the home screen. To go back to a previous screen, click the back button in the Report Navigation & Exporting Tools.*

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Agency Search

OMNIA Partners Connect allows you to search for agencies based on state, agency type, and name. When you use this search function, you have the option to see a list of agencies that have sales associated with your contract(s) and/or prospects that have access to your contract(s), but no associated sales. Information provided is specific to your organization and will vary depending on your user profile.

Search Dashboard

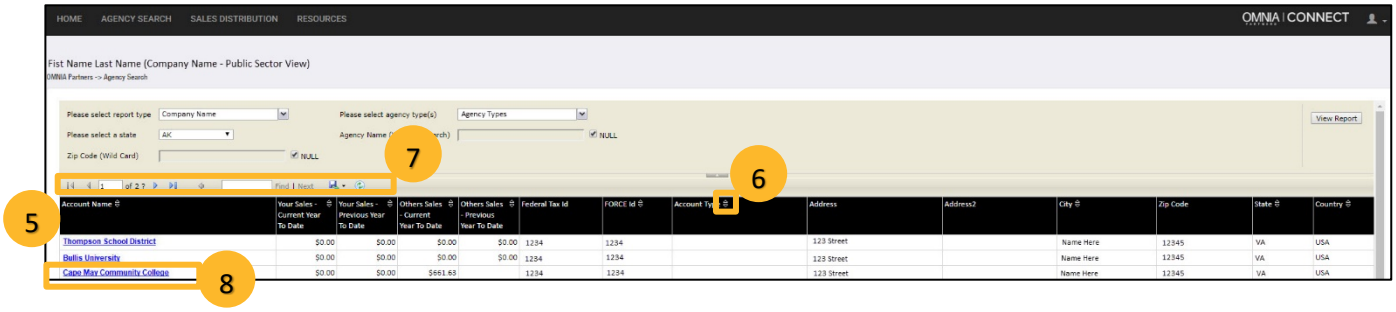


1. From Home, **select Agency Search.**

2. **Select Report Type, State, and Agency Type(s)**. Unselect the NULL checkbox next to the Wildcard Search for Agency Name and/or Zip Code to include specific criteria on agency name and/or zip code in your search.

3. **Click View Report.**

4. Agency Search Results



5. Report View Includes:
   - **Agency Name**
   - **FORCE ID**
   - **City**
   - **Sales Data**
   - **Account Type**
   - **State**
   - **Federal Tax ID**
   - **Address**
   - **Zip Code**

6.  **Click the sort button** at the top of a column to sort the values in ascending or descending order according to that column.

7. Tools for navigating and exporting the report. See, Report Navigation & Exporting Tools.

8. **Click the agency name** to see the Agency Dashboard that provides additional information on that agency.

Tip: *When performing a search where you use Agency Wildcard place a % in front of each word to widen your search results.*

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Agency Dashboard

When you click on an agency's name from any report within OMNIA Partners Connect, you will see an overview of the agency, which highlights their spend with your organization and with OMNIA Partners as a whole.



1. Year to Date Sales for Supplier, Others and Total Program Sales. The column heading labeled with Others provides sales amounts for all other contracts the agency has used through the OMNIA Partners program and does not include dollars spent under your contract(s). The column heading labeled with your company name includes all sales for the agency through your contract(s).

2. Annual Sales shows month by month spend for your contracts and Others (OMNIA Partners Contracts).

3. Agency sales distribution trend over the last three years.

4. Contacts for the agency.

5. Gauge of total agency spend year-to-date. The total range provides the dollar amount for overall program sales, and the black arrow points to the dollar amount for sales under your organization's contract(s).

6. Supplier Engagement shows the total number of OMNIA Partners suppliers the agency has purchased from during the previous and current year.

7. Tools for navigating and exporting the report. See, Report Navigation & Exporting Tools.

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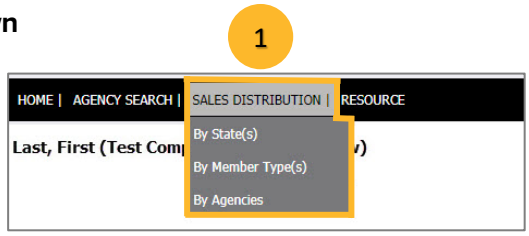
Sales Distribution

Search sales distribution based on state(s), agency type(s) or individual participants. Information provided is specific to your organization and will vary depending on your user profile.

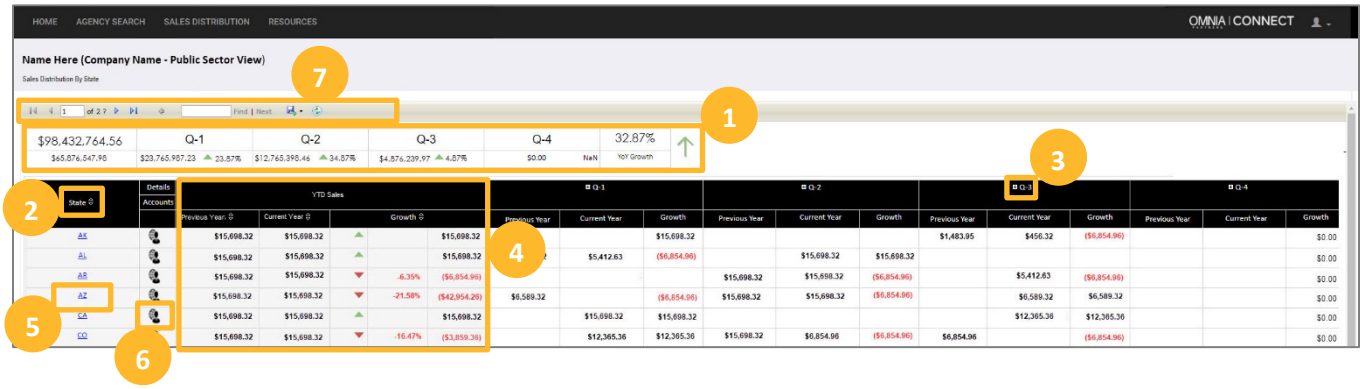
By State(s) Search

This view allows you to see current and previous year-to-date sales by State for your contract(s).

1. From Home, **click the Sales Distribution dropdown** and **select By State(s).**



By State(s) Search Results



1. Current YTD sales vs previous YTD sales, along with growth by amount and by percent for each quarter and YoY (Year-over-Year) growth.

2. **Click the sort button** at the top of a column to sort the table by ascending or descending order according to that column.

3. **Click the + button** to expand any quarter to see sales by month for that quarter.

4. YTD Sales provides information on PY (Previous Year) Sales, CY (Current Year) Sales, and the growth percentage and dollar amount.

5. **Click State Hyperlinks** for an overview of sales by agency types within each state. See, View Agency Types via State Search Results.

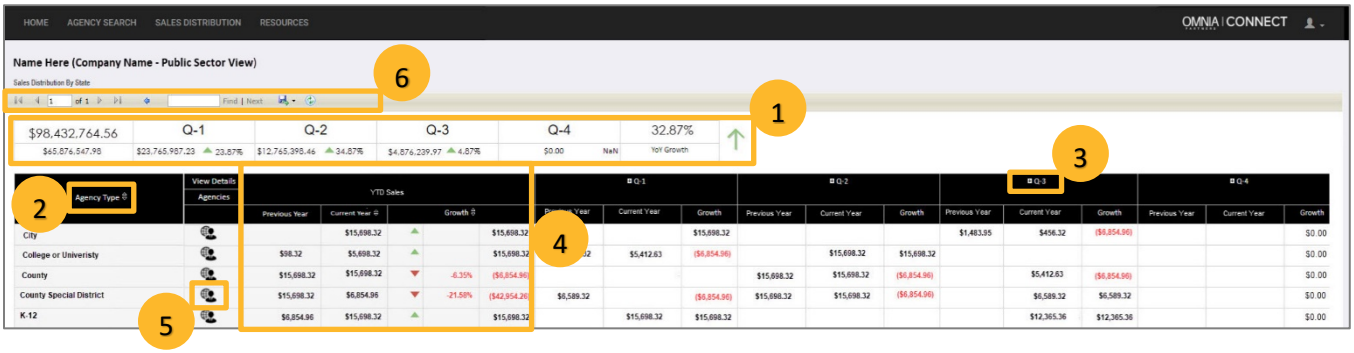
6. **Click Details Accounts** for any state to view sales for all agencies in that state. See, View Agencies via State Search Results.

7. Tools for navigating and exporting the report. See, Report Navigation and Exporting Tools.

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View Agency Types via State Search Results

When you click the hyperlink on any state from By State Search Results, a new screen will open displaying sales data for all agency types purchasing from your contract(s) in that state.



1. Current YTD (Year-to-Date) sales vs previous YTD sales, growth by dollar amount and by percentage per quarter, and YoY (Year-over-Year) growth.

2. **Click the sort button** at the top of a column to sort the table by ascending or descending order according to that column.

3. **Click the + button** to expand any quarter to see sales by month for that quarter.

4. YTD Sales provides information on PY (Previous Year) Sales, CY (Current Year) Sales, and the growth by dollar amount and by percentage.

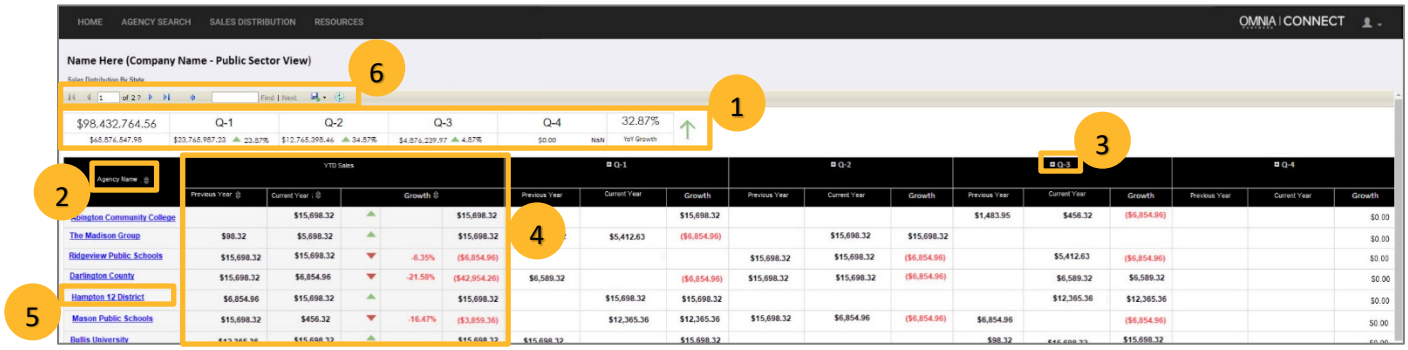
5. **Click View Details** for any agency type to view sales for all agencies in that state for that agency type. See, View Agencies via State Search Results.

6. Tools for navigating and exporting the report. See, Report Navigation and Exporting Tools.

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View Agencies via State Search Results

When you click view details for any state from By State(s) Search Results a new screen will open displaying sales data for all agencies purchasing from your contract(s) in that state.



1. Current YTD (Year-to-Date) sales vs previous YTD sales, growth by dollar amount and by percentage per quarter, and YoY (Year-over-Year) growth.

2. **Click the sort button** at the top of a column to sort the table by ascending or descending order according to that column.

3. **Click the + button** to expand any quarter to see sales by month for that quarter.

4. YTD Sales provides information on PY (Previous Year) Sales, CY (Current Year) Sales, and the growth by dollar amount and by percentage.

5. **Click any agency name hyperlink** to obtain an overview of that agency. For additional details see, Agency Dashboard.

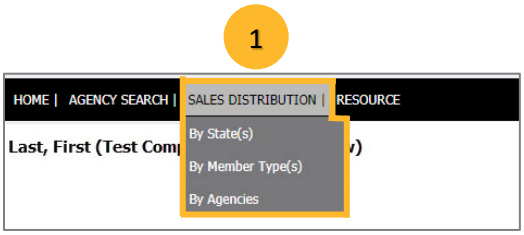
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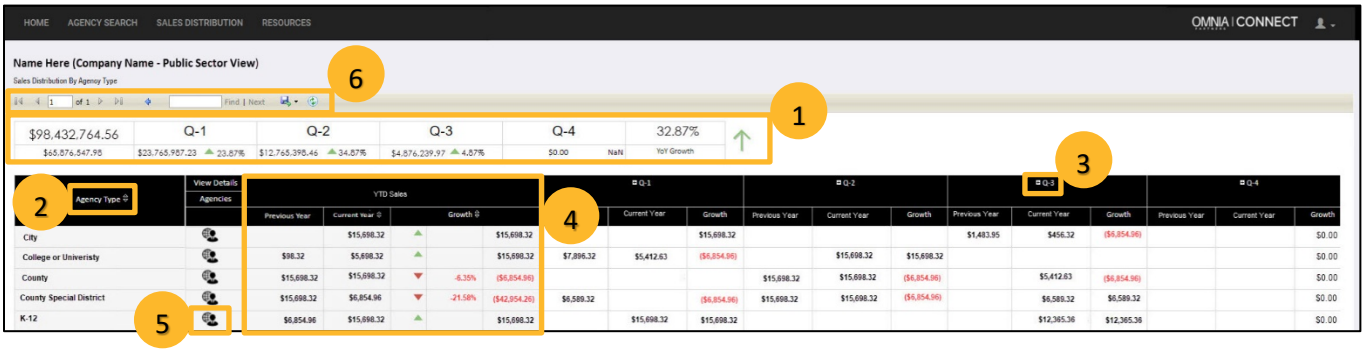
By Member Type(s) Search

This view displays sales data for all agency types purchasing from your contract(s).

1. From Home, **click the Sales Distribution dropdown** and **select By Member Type(s)**



By Member Type(s) Search Results



1. Current YTD sales vs previous YTD sales, along with growth by amount and by percent for each quarter and YoY (Year-over-Year) growth.

2. **Click the sort button** at the top of a column to sort the table by ascending or descending order according to that column.

3. **Click the + button** to expand any quarter to see sales by month for that quarter.

4. YTD (Year-to-Date) Total provides information on PY (Previous Year) Sales, CY (Current Year) Sales, and the growth percentage and dollar amount.

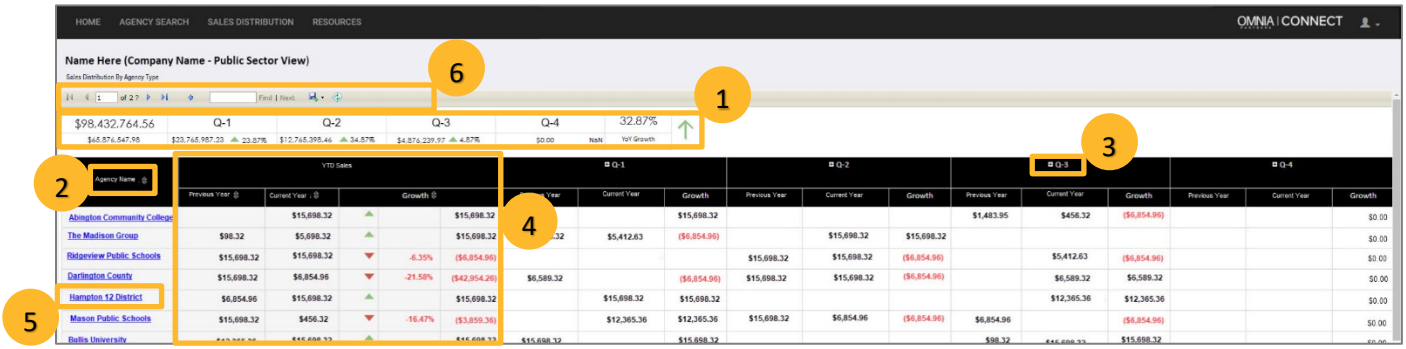
5. **Click View Details** for any agency type for an overview of sales for that Agency Type. See, View Agencies via Member Type(s) Search.

6. Tools for navigating and exporting the report. See, Report Navigation and Exporting Tools.

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View Agencies via Member Type(s) Search

When you click view details for any agency type from By Member Type(s) Search Results a new screen will open displaying sales data for all agencies purchasing from your contract(s) for that agency type.



1. Current YTD sales vs previous YTD sales, along with growth by amount and by percent for each quarter and YoY (Year-over-Year) growth.

2. **Click the sort button** at the top of a column to sort the table by ascending or descending order according to that column.

3. **Click the + button** to expand any quarter to see sales by month for that quarter.

4. YTD (Year-to-Date) Total provides information on PY (Previous Year) Sales, CY (Current Year) Sales, and the growth percentage and dollar amount.

5. **Click any agency name hyperlink** to obtain an overview of that agency. For additional details see, Agency Dashboard.

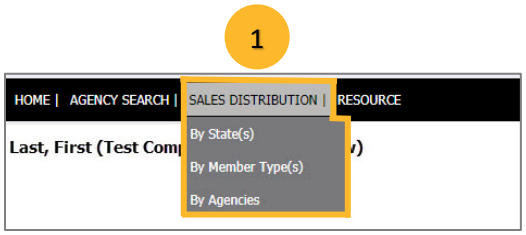
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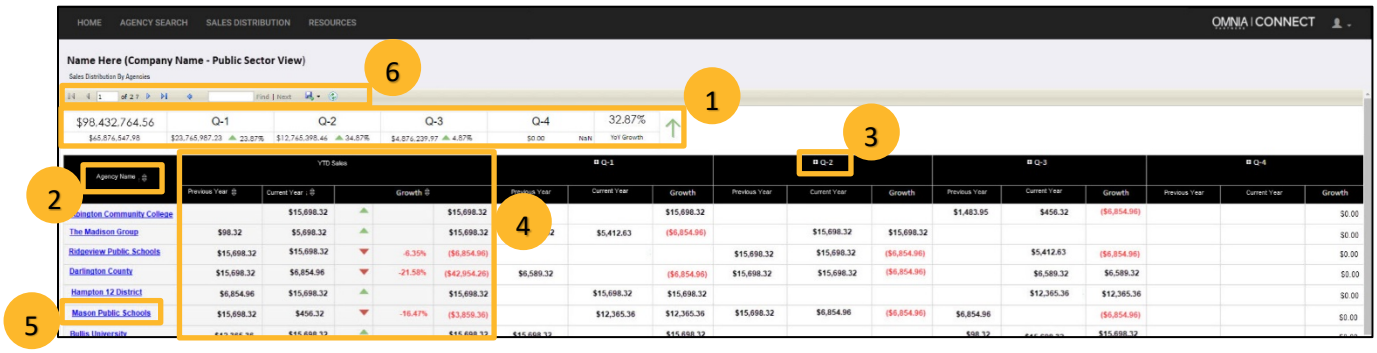
By Agencies Search

This view displays sales data for all agencies purchasing from your contract(s).

1. From Home, **click the Sales Distribution dropdown** and **select By Agencies.**



By Agencies Search Results



1. Current YTD sales vs previous YTD sales, along with growth by amount and by percent for each quarter and YoY (Year-over-Year) growth.

2. **Click the sort button** at the top of a column to sort the table by ascending or descending order according to that column.

3. **Click the + button** to expand any quarter to see sales by month for that quarter.

4. YTD (Year-to-Date) Total provides information on PY (Previous Year) Sales, CY (Current Year) Sales, and the growth percentage and dollar amount.

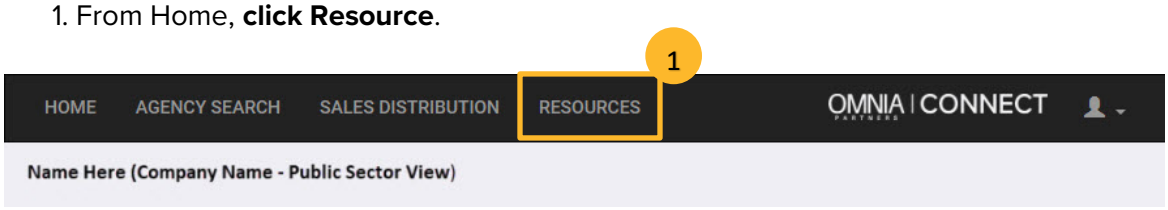
5. **Click any agency name hyperlink** to obtain an overview of that agency. For additional details see, Agency Dashboard.

6. Tools for navigating and exporting the report. See, Report Navigation and Exporting Tools.

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Resource

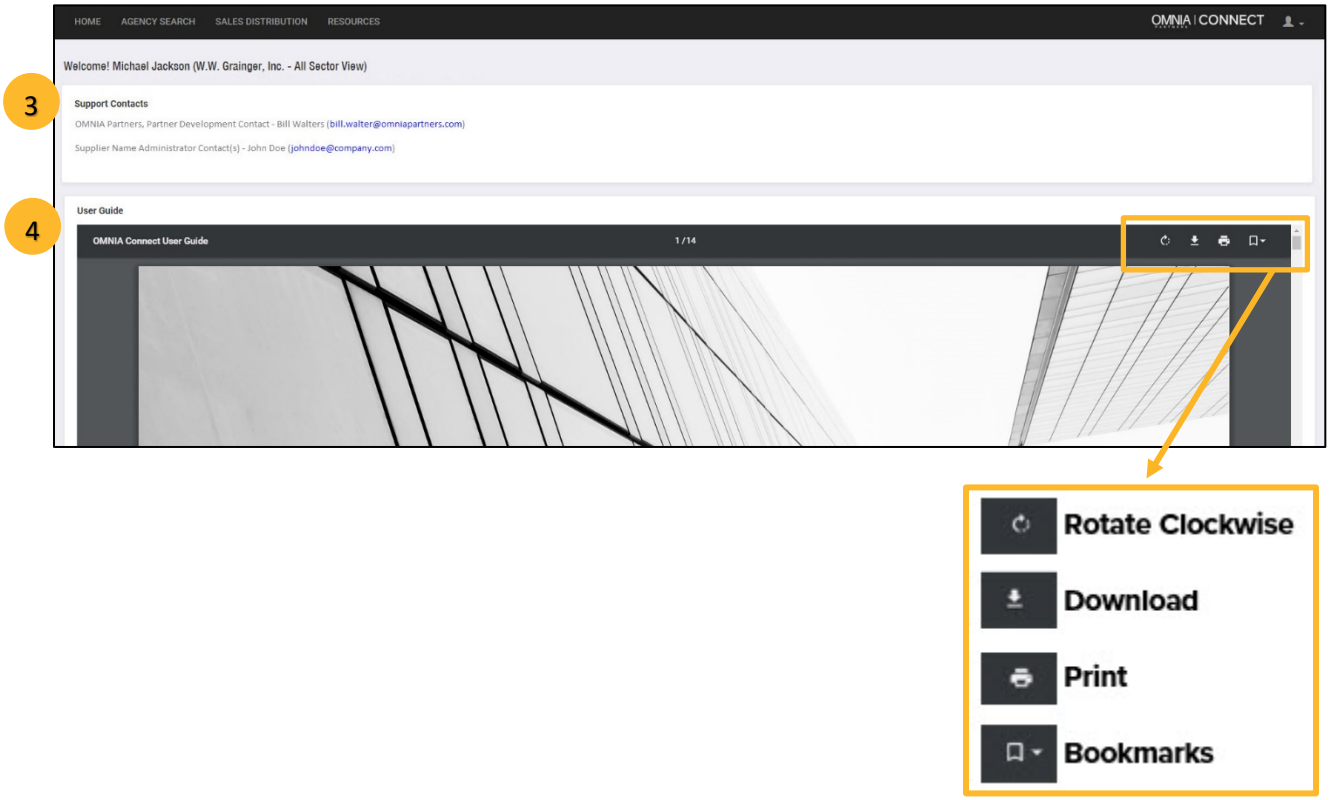
1. From Home, **click Resource**.



2. A new page will open displaying available OMNIA Partners Connect resources

3. **Support Contacts** – Information on your Partner Development contact at OMNIA Partners and the administrator(s) of OMNIA Partners Connect for your organization.

4. **User Guide** along with guide tools.



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