
Boardwalktech – Collaborative Planning Applications

Does your company use EXCEL as a strategic tool?

If yes, how do you merge the individual spreadsheets in order to obtain reliable figures and plan your business effectively?

Is this procedure in your organization clearly structured and efficient, or rather laborious and time-consuming?

Smooth and consolidating planning processes are crucial in today's business world since they increasingly become the focus in the optimization of business operations and significantly affect revenues and margins. However, many companies are faced with the challenge that SAP, Oracle, and other ERP applications do not effectively support comprehensive planning.

A typical employee does not work as a member of a larger team or configuration and frequently operates in "isolation", on his local desktop, working with his own spreadsheets. This type of work habit spreads throughout the company and branches. Does this sound familiar to you and do you want to fix it?

Then use Boardwalktech to optimize your business processes!

- Boardwalktech gives your Excel processes multi-user capabilities and makes it collaborative with enterprise quality.
- Boardwalktech software allows several users to work on the same spreadsheet data at the same time with only selected rows and columns using access control and server-side change management.
- The patented technology of Boardwalktech fixes the issues that often exist in the connection and the scaling of spreadsheets to databases.
- Boardwalktech can easily be integrated into various known Enterprise Resource Planning (ERP) Systems.
- Boardwalktech uses and extends your existing investments in SAP, Oracle, Microsoft Dynamics, and Excel and fills in the gaps in existing processes.
- Boardwalktech gives Excel a "Third Dimension" by adding a user and time change history to all cells.
- Boardwalktech solves existing business problems with tools that are already familiar to the employees.
- Boardwalktech supports cell-level change management, providing a comprehensive audit trail of all changes by all users.
- Boardwalktech can use the public or private cloud for storing the data.
- Boardwalktech is for Enterprises as well as for Service Providers.

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These companies are already benefiting from the Boardwalktech software:



An example for collaborative planning with Boardwalktech: Coca Cola and Target

Multiple SKUs are managed using familiar navigation

Refresh Workbook Submit Workbook Forecast View

- ✓ Missing margin and revenue targets
- ✓ Moved planning from monthly to weekly (4x)
- ✓ Increased margins 6% /revenue \$24M with Target
- ✓ Deployments with Target, Safeway, Kroger

Familiar drag & drop, copy/paste functionality for editing planning data

Planning horizon can be rolled without sending out new spreadsheets to all users

Class	Descriptive	Bottle	Subclass/MIC	Type	Measure	Yearly Total	2010-05-03 WK1	2010-05-10 WK2	2010-05-17 WK3	2010-05-24 WK4	May Total	2010-05-31 WK1	2010-06-07 WK2	2010-06-14 WK3	2010-06-21 WK4	21
18	DASANI	CCEC	203-CL70 ALL THE REST OI	Annual Plan	Promo Retail	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
19	DASANI	CCEC	203-CL70 ALL THE REST OI	Annual Plan	Reg Sales \$	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
20	DASANI	CCEC	203-CL70 ALL THE REST OI	Annual Plan	Promo Sales \$	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
21	DASANI	CCEC	203-CL70 ALL THE REST OI	Annual Plan	Total Sales \$	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
37	DASANI	CCEC	203-CL70 ALL THE REST OI	Forecast	Aid Comments			good uplift here								
38	DASANI	CCEC	203-CL70 ALL THE REST OI	Forecast	Reg Sales Units	4,580	500	560	580	650	2,290	500	560	580	650	
					Casecost	\$ 8	\$ 8	\$ 8	\$ 8	\$ 8	\$ 8	\$ 8	\$ 8	\$ 8	\$ 8	\$ 8
					Casepack	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24	\$ 24
					Unit Cost	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34	\$ 0.34
					Total Cost	\$ 1,569	\$ 171	\$ 192	\$ 199	\$ 223	\$ 784	\$ 171	\$ 192	\$ 199	\$ 223	\$ 223
					Store Base PMU %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
					Chal MD %	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
53	DASANI	CCEC	203-CL70 ALL THE REST OI	Forecast	Reg Sales Units	1,010	480	530	0	650	1,010	500	560	580	650	
62	DASANI	CCEC	203-CL70 ALL THE REST OI	Weekly Actuals	Promo Sales Units	2,500	750	800	950	0	2,500	0	0	0	0	
63	DASANI	CCEC	203-CL70 ALL THE REST OI	Weekly Actuals	Total Sales Units	3,510	1,230	1,330	950	0	3,510	0	0	0	0	
64	DASANI	CCEC	203-CL70 ALL THE REST OI	Weekly Actuals	Reg Retail	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
83	DASANI	CCEC	203-CL70 ALL THE REST OI	Forecast + Actuals	Reg Sales Units	4,010	480	530	0	650	1,010	500	560	580	650	
84	DASANI	CCEC	203-CL70 ALL THE REST OI	Forecast + Actuals	Promo Sales Units	2,500	750	800	950	0	2,500	0	0	0	0	
85	DASANI	CCEC	203-CL70 ALL THE REST OI	Forecast + Actuals	Total Sales Units	3,510	1,230	1,330	950	0	3,510	0	0	0	0	
86	DASANI	CCEC	203-CL70 ALL THE REST OI	Forecast + Actuals	Reg Retail	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
87	DASANI	CCEC	203-CL70 ALL THE REST OI	Forecast + Actuals	Promo Retail	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
104	DASANI	CCEC	203-CL70 ALL THE REST OI	History	Reg Sales Units	0	56	88	97	0	0	0	0	0	0	0
105	DASANI	CCEC	203-CL70 ALL THE REST OI	History	Promo Sales Units	0	0	0	0	0	0	0	0	0	0	0
106	DASANI	CCEC	203-CL70 ALL THE REST OI	History	Total Sales Units	0	0	0	0	0	0	0	0	0	0	0

Changes are shown at the cell level. All changes are captured so you have a complete audit trail of changes

Boardwalk: value changed from 2,250 to 2,500

Each bottler only sees their data. Roll up is done automatically across data dimensions

Filters are used to focus in on planning measures of interest

Access control means users can only change what they're supposed to