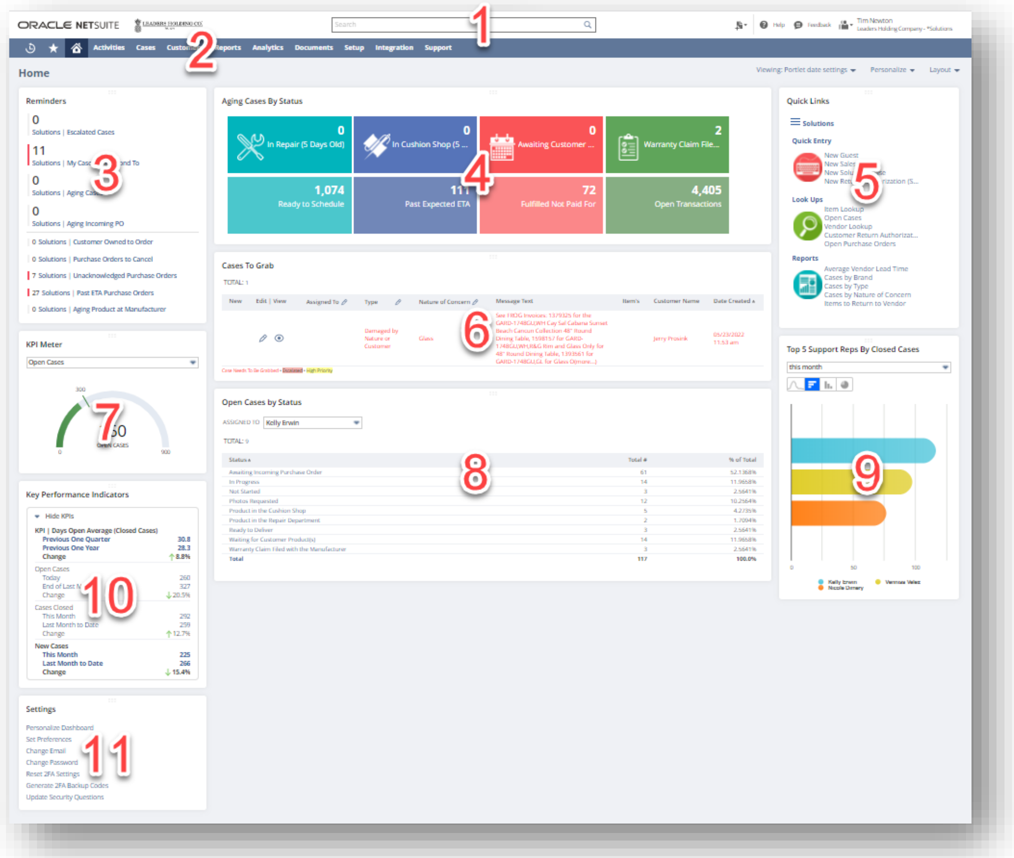
LEADERS HOLDING CO.™
Est. 1971

Solutions Center Dashboard and KPIs

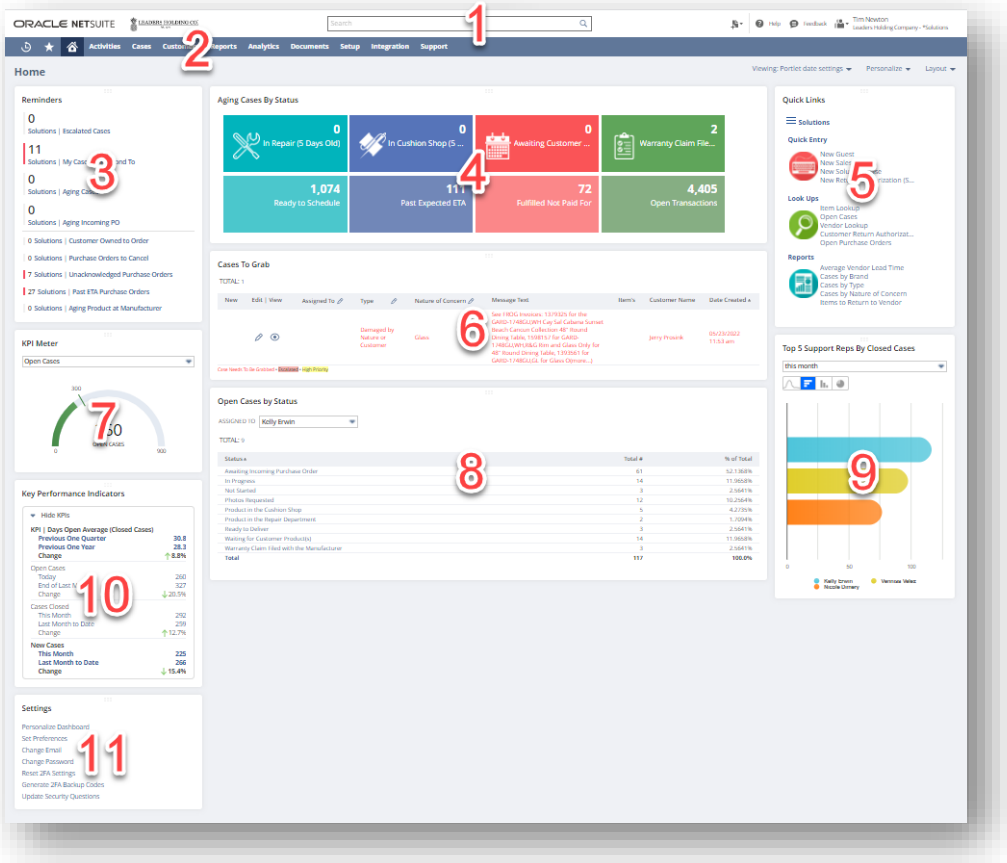
The Solutions Team has a specialized NetSuite Dashboard. If a Solutions team member trusts and works the dashboard, they will efficiently give guests a high-level experience.

Table of Contents

Dashboard Overview



#	What?	Why?	How?
1	Global Search	Searches all of NetSuite for easy referencing	Tutorial documents and videos can be found on the internet by searching “NetSuite Global Search Tips & Tricks.”
2	Tabs	Additional pages with focused information on each topic.	Click the tab name to access each focused tab
3	Reminders	Fundamental reports to successfully manage open cases.	Click on each visible reminder to see the cases that need work. If a reminder has zero items in the report, the report may not show in the reminders if you have it set not to show zero.
4	Aging Cases By Status	These tiles show active cases assigned to you that have aged beyond acceptable thresholds and need attention. Supervisors will see their cases and the team’s cases.	Click on each tile to review the case and take action.



#	What?	Why?	How?
5	Quick Links	These tiles show	Shortcuts to common tasks
6	Cases To Grab	List of new cases that need to be assigned to a solutions agent	Click on a line to start working the case
7	KPI Meter	Number of open solutions cases	Count of total open cases
8	Open Cases by Status	Number of open cases by status	Click on each status to see a detailed list of each case under each status
9	Closed Cases by Rep	Number of cases closed by each solutions agent over a defined time	You can adjust the timeframe for the report .
10	Key Performance Indicator	Solutions Center metrics regarding Open, Closed, & New Cases and the average time a case is open.	
11	Settings	NetSuite specific settings	

Reminders

All team members should set this list to not show a reminder with Zero results. Setting reminders this way makes it a "to-do list," alerting agents of tasks they need to complete. Please ask for help if your reminders list is showing Zeros.

Reminders on the reminders list show a Solutions Team member exactly which case needs attention and why. The reminders list will direct the Solutions Team through the most efficient day possible.

Solutions | Escalated Cases

Criteria:

Case(s) with Escalated Priority, regardless of who the case is assigned to.

Goal:

Alert the entire team of an escalated case so that any available solutions team member can take more immediate action.

Solutions | My Cases to Respond To

Criteria:

Case(s) assigned to the user in which the system shows no response to an incoming customer or store inquiry about the case.

Goal:

Alert the assigned team member that an inquiry has been made on one of their cases and we need to reply. If we do not reply directly to the customer through NetSuite, when we add notes to the case, uncheck the 'Internal Only' box so that the system knows we have had external communication regarding the case with the guest.

Solutions | Aging Cases

Criteria:

Open Case(s) assigned to the user and subordinates without activity for seven calendar days or more. Cases with a status of Awaiting Incoming Purchase Order, Product at the Manufacturer, On Hold, Product in Repair, Product in Cushion Shop, Waiting on Customer Product or Warranty Claimed with Manufacturer are not included since these statuses are addressed in alternate portions of the dashboard.

Goal:

Review the case to determine what action needs to be taken in order to progress.

Solutions | Aging Incoming PO

Criteria:

Open Case(s) assigned to the user where the purchase order ETA date is before today. The purchase order is late.

Goal:

Communicate with the vendor that the Purchase order is on track for the expected receipt date and provide an update to the customer that things are on track or if any changes to the eta date of occurred.

Solutions | customer Owned to Order

Criteria:

Open Sales Orders for Customer Owned Goods that need a Purchase Order processed in order to have the incoming product received.

Goal:

Create a purchase order for incoming Customer Owned Goods.

Solutions | Purchase Orders to Cancel

Criteria:

Purchase Orders that are no longer needed for an open sales order.

Goal:

Determine if product is still needed. If good are no longer needed cancel with the manufacturer. Once confirmation is received from the manufacturer of the cancellation, cancel the purchase order in NetSuite.

Solutions | Unacknowledged Purchase Orders

Criteria:

Purchase Orders marked as 'Notify Solutions' three days ago or more that do not have an acknowledgment number from the manufacturer.

Goal:

Confirm we have received an acknowledgment from the Manufacturer for the Purchase Order and enter the acknowledgment number into the NetSuite PO. If we have not received, inquire for an update from the manufacturer.

Solutions | Past ETA Purchase Order

Criteria:

Open Purchase Orders marked as 'Notify Solutions' that are past their expected receipt date.

Goal:

Inquire with the manufacturer for an update on the purchase order. Log any updates on the purchasae order and communicate the appropriate information to the guest.

Solutions| Aging Product at the manufacturer

Criteria:

Open Case(s) assigned to the with a Status of ‘Product at the Manufacturer’ without activity for 2 weeks or longer.

Goal:

Inquire with the manufacturer for an update. Update the case, purchase order and the customer.

Solutions | Cases on Hold

Criteria:

Case(s) on hold regardless of who they are assigned.

Goal:

This report is for awareness. Close any case after significant amount of time on hold.

Aging Cases By Status Tiles

The Aging Cases by Status tiles show cases that need attention. Statuses on a case are fluid and should be changed based on the phase a case is in.

Case Statuses

Status	What?	When?
Not Started	The case has not been assigned and no action has been taken	A case will have this status when it has just been entered.
In Progress	Immediately after the case is assigned	The case is assigned to an agent and they are working to discover a solution
Photos Requested	Waiting to receive photos from the customer of the concern	Assign after the photo request template has been emailed to the customer
Waiting for Customer Product(s)	Waiting to receive product relating to the case from the customer	Assign this status after a Return Authorization has bee written and scheduled.
Awaiting Incoming Purchase Order	Waiting for product or parts to come from the factory	Assign status after a resolution has been agreed to by the factory and the purchase order for parts has been entered in NetSuite
Warranty Claim Filed with the Manufacturer	A warranty claim has been emailed to the factory using the claim email template	Assign status after a warranty claim request has been sent to the factory.
Product in the Repair Department	Customer-owned product relating to the case is in the repair department	Assign status after the customer's product has been received and it has been moved to the repair department
Product in the Cushion Shop	Customer-owned product relating to the case is in the cushion shop	Assign status after the customer's product has been received and it has been moved to the cushion shop
Product at the Manufacturer	Customer-owned product has left the Leaders Distribution center and is in the custody of the manufacturer	Assign status after the product has left the Leaders Distribution Center
Ready to Deliver	All of the customer's repaired products are ready to be fulfilled back to the customer	Assign this status when “Ready to Deliver” is true on the sales order.
Re-Opened	When a case is closed a customer may contact us again for the same concern.	Assign this status when re-opening a previously closed case.
Do Not Use	This is a default filed we cannot remove. Do not use it please	

Click on each tile and work each case listed in the report.

Tile Description

Tile	When?	Report	Criteria
In Repair (5 Days)	Review and work daily	Solutions | Product in Repair (Aging)	✓ Case is open and not on hold ✓ Product is in the Repair Department longer than 5 days ✓ The case is assigned to me
In Cushion Shop…	Review and work daily	Solutions | Product in Cushion Shop (Aging)	✓ Case is open and not on hold ✓ Product is in the Cushion Shop longer than 5 days ✓ The case is assigned to me
Awaiting Customer Reply	Review and work daily	Solutions | Awaiting Customer Product (Aging)	✓ Case is open and not on hold ✓ We are waiting more than 7 days for product to arrive for the guest. ✓ Cases assigned to me or not assigned to anyone
Warranty Claim	Review and work daily	Solutions | Warranty Claim Filed (Aging)	✓ Case is open and not on hold ✓ The Status is Warranty Claim Filed with the manufacturer more than three days ago ✓ Cases assigned to me or not assigned to anyone
Ready to Schedule	Review and work daily	Solutions | Ready to Schedule (Mine & My Team)	✓ Is a Sales Order or Return Authorization ✓ Is ready to deliver ✓ I am the sales rep
Past Expected ETA	Review and work daily	Solutions | Past Expected ETA	✓ Is a Sales Order or Return Authorization ✓ The “Estimated Ready Date” is before today ✓ I am the sales rep
Fulfilled Not Paid For	Review and work daily	Solutions | Fulfilled & Not Paid For (Mine & My Team)	✓ Is an invoice with an open balance for good delivered before today ✓ The method of payment is not financing ✓ I am the sales rep
Open Transactions	N/A	Solutions | Open Transactions (Mine & My Team	✓ Is an open Return Authorization or a Sales Order ✓ I am the sales rep

Successful Day Check List

There are many variables in a day. If you can work through this checklist each day while managing things that come up you will be successful.

Live customer communication and fast responses are a top priority. We should obsess on phone calls, voicemail and email.

Task	Complete
Start the day	
Voicemail	
Email	
My Cases to Respond to	
Reminders with results greater than zero	
Aging Cases By Status (Top Row)	
Repeat throughout the day	
Voicemail	
E-mail	
My Cases to Respond to	
Open Cases By Status – Not Started	
Open Cases By Status – Ready to Deliver	
Work any orders in repair or cushion shop	
Before end of day	
My Cases to Respond to	
Communicate with supervisor for special projects	
Voicemail	
E-mail	