Sales Team NetSuite Dashboard & Tabs Overview

The Retail Sales Rep and Retail Store Manager NetSuite Dashboard & Tabs have all of the information necessary to successfully manage your customer relationships, open orders, measure your success against your peers, and manage a retail location's inventory and hiring needs. A complete understanding of your dashboard & tabs will help you be informed, give the best customer experience, and maximize your income potential.

The Dashboard is intuitive and easy to learn. Do not try to learn it all at once. Explore and discover a new section every day.

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Beginner, Intermediate, Advanced
Learning the entire NetSuite Dashboard at once can be overwhelming. Continuous improvement is the key. Learn a new area each day.

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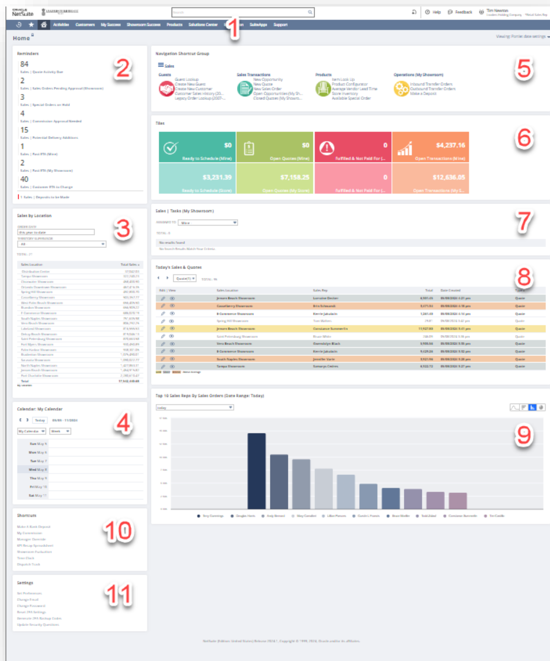
Dashboard Layout

There are 11 areas of the Homne Screen Dashboard to learn about and tabs. Each area holds different information.



This is an overview of each area of the dashboard. We will go into detail for each section later in this document.

	What?	Why?
1	Tabs & Global Search	The tabs allow a more narrow focus on important topics like your open Solutions Cases, Product, or where you rank among the sales team. Global Search allows you to quickly find and navigate to information without going through menues. For additional information: R:\0 About Leader's Holding Company Essentials\0.12 Symbols & Shortcuts
2	Reminders	Important information about managing your opportunities and open orders. Should be reviewed daily.
3	Sales By Location	Quickly reference where you rank for the day. This report must be refreshed manually for the most up to date information.
4	Calendar	If you are using your calendar and tasks, your “to do” list will show up here. This is a great way to stay organized and give the most professional guest experience.
5	Navigation Shortcut	Quick links to commonly referenced information
6	Tiles	Up-to-date critical information on your and your store's open transactions.
7	Today's Sales & Quotes	The sales and quotes written throughout the company today day.
8	Top Sales Rep	Top sales reps for a given time period. Default is “Today.”
9	Settings	Links to set up your instance of NetSuite
10	Navigation Shortcuts	Links to frequently used forms and information in NetSuite
11	Settings	Menue where you can change particulars about your NetSuite account

1 Tabs, Global Search & Change Roles

Tabs

The tabs allow a narrow focus on important topics like your open Solutions Cases, Products, or where you rank among the sales team.

Global Search

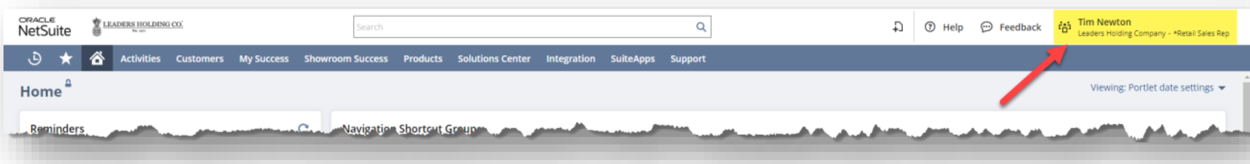
Allows you to quickly find and navigate to information without going through menus

Change Roles

To change roles, hover over your name in the top right of the NetSuite window.

You can access:

- ✓ Employee Center
- ✓ Retail Sales Rep
- ✓ Retail Sales Rep Sandbox
    - R:\0 About Leader's Holding Company Essentials\0.17 Sandbox Training Environment



2 Reminders

Reminder	What?
Sales | Quote Activity Due	If you properly set your "Next Activity" dates on your open quotes, this reminder will tell you which quotes must be followed up on and are past the "Next Activity" date.
Sales | Sales Orders Pending Approval (Showroom)	Sales Orders must have a deposit to be approved. Sales Orders will not reserve merchandise if they are not approved. Work with your territory Leader to correct anything in the report.
Sales | Special Orders on Hold	A special order is placed on hold when the purchasing department does not have enough information to process it. The purchasing department will email you with questions. Please respond to the purchasing team immediately to prevent further delay.
Sales | Commissions Approval Needed	Sales Orders with pricing errors or repetitive mistakes made by the same sales associate that cause the company unnecessary expenses will show up in this search. A sales order in this search will not pay a commission when fulfilled. Resolve them with your territory Leader.
Sales | Potential Delivery Additions	Multiple trips to a guest's home cause more inconvenience. This report gives you sales orders that you can combine with existing fulfilments, reducing trips and increasing guest satisfaction.
Sales | Past ETA (Mine)	Your orders that are past the ETA date and not fulfilled
Sales | Past ETA (My Showroom)	Your store orders that are past the ETA date and not fulfilled
Sales | Customer ETA Change	Your orders where the ETA date on a line item has changed from what it originally was. Review the order and communicate with the guest.
Sales | Deposits to be Made	Daily deposits for your location that have not been brought to the bank.

3 Sales By Location


Sales by Location

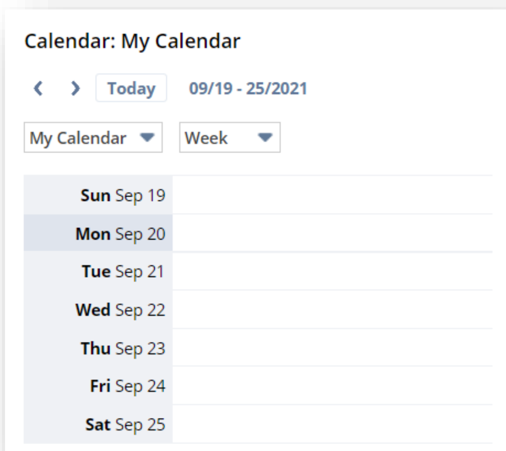
Sales Location ▲	Total Sales
Bradenton Showroom	20,649.73
Brandon Showroom	23,068.99
Casselberry Showroom	5,122.98
Clearwater Showroom	6,886.95
Delray Beach Showroom	3,107.56
Fort Myers Showroom	22,089.70
Jensen Beach Showroom	21,149.78
Lakeland Showroom	15,721.78
North Naples Showroom	1,862.97
Orlando Downtown Showroom	19,399.85
Palm Harbor Showroom	14,309.80
Port Charlotte Showroom	22,479.30
Saint Petersburg Showroom	9,958.94
Sarasota Showroom	15,812.86
South Naples Showroom	283.49
Spring Hill Showroom	405.98
Tampa Showroom	6,038.95
Vero Beach Showroom	3,506.95
West Palm Beach Showroom	29,967.83
Total	**241,824.39**

My Location

Quickly see where your team ranks for the day. You must manually refresh the report for the most up-to-date information

4 Calendar

The Calendar is an underutilized tool. It can organize your time, help you remember tasks and follow up with guests, and coordinate you and your team on regularly occurring tasks. This is the best way to stay organized and give the best customer experience.



5 Navigation Shortcut Group

The navigation Shortcut Group contains all the quick links to information that you need to have a successful day. There is more than one set of shortcuts, which are subdivided by category.

Change The Short Cut Group

To change the shortcut group and what is displayed, hover over the 3 bars in the top left of the shortcut group and select the shortcut group you would like to see. Once you select, scroll your mouse into an open area on the screen to save your selection. You can choose between:

- ✓ **Sales**
  All of the everyday items you need to manage guests and inventory
- ✓ **Forms & References**
  Information is used to reference vendors, keep the showroom fresh, communicate within the company, and tag your floor.
- ✓ **Showroom Manager** (Only if you have showroom manager permission)
  Tools to keep inventory up to date in a showroom, hire, and keep track of showroom key performance indicators to share on the weekly manager call.

Sales

Guest

Shortcut	What?
Guest Lookup	Look up guests who have ordered in the past to reference their accounts. R:\3 About Customers and Orders
Create New Customer	Create a new customer record R:\3 About Customers and Orders
Customer Sales History (2019 – Present)	Look up past customers by what they purchased so you can communicate promotions and follow up on the relationship.
Legacy Order Lookup (2007 – 2019)	Reference old accounts from the Legacy system we had before NetSuite. If you still do not find what you want, contact the Solutions Center or Purchasing, who can research back to 1994.

Sales Transactions

Shortcut	What?
New Opportunity	Record a guest interaction with minimal information about the guest. R:\0 About Leader's Holding Company Essentials\ 0.13 Stages of a Customer, CRM Pipeline
New Quote	Create a new Quote from a guest interaction to follow up with
New Sales Order	Create a new sales order. R:\3 About Customers and Orders
Opportuintes (My Showroom)	Review open opportunities for your showroom to best place your efforts for the day.
Close Quotes (My Showroom)	You can search this list to let a guest from the past know about a sale. Review past quotes that have been closed for reference and to look for selling opportunities.

Products

Shortcut	What?
Item Look Up	Filter through the active stock inventory to look for an item.
Product Configurator	Quickly and easily configure special order items without being on a quote or sales order.
Average Vendor Lead Time	See the performance of all vendors over the last three months and the Leaders recommended lead time for new orders.
Store Inventory	See all of the store inventory by location, by brand, by category.
Available Special Order	Have fun reviewing canceled special order items to find your guest a deal. The information can be sorted in many different ways to find what you need.

Operations (My Showroom)

Shortcut	What?
Inbound Transfer Orders	Review the inventory that is scheduled to come to your location.
Outbound Transfer Orders	Review the inventory that is scheduled to leave your location.
Make a Deposit	Review the collected and undeposited cash and checks from your location to create a bank deposit. This report will not work if you have not followed the set-up instructions. 0.16 Standard NetSuite Configuration Set Preferences

Forms & References

Product Request Forms

Shortcut	What?
Sample Request Form	Print to audit and request fabric samples
Floor Model Markdown Request	Follow the instructions on the form to request price markdowns for showroom samples.
Tag Request Form	Use this form to request point-of-sale tags
Tear Sheer Request Form	Request product information tear sheets

Main Vendor Shortcuts

Click the shortcut to go to the vendor record. Here you will find:

- ✓ Catalog
- ✓ Pricelist
- ✓ Ownership Packets
- ✓ Contact information for company representatives

Reference Lists

Shortcut	What?
Corporate Extension List	Directory of Leaders Holding Co contact information
Shipping Rates	Shipping Rates by Zone for the United States
Showroom Listing	Listing of the managers and team members for each retail location
Shuttle & Delivery Schedule	Overview of the in-home fulfillment options and the days that in-home fulfillment and transfers happen.
Stocking Fabric Quick Reference	A quick reference and summary of what fabrics are stocked on each collection.

Point of Sale

Shortcut	What?
Ad Notes – Current	Notes and knowledge for the current promotions
Price Tag - Accessory	A fillable and printable tag for accessories
Price Tag – Indoor	A fillable and printable tag for indoor product
Price Tag – Outdoor	A fillable and printable tag for outdoor product
Showroom Merchandise Priority	The order clearance merchandise should be reserved and removed from retail locations.

Printable Forms

Shortcut	What?
Daily Balance Sheet	Paper form to reconcile the cash drawer nightly
Open & Closing Checklist	A team checklist to successfully open and close a showroom
Cleaning Checklist	Check list of expectations for the cleaning crew. This must be signed by the cleaning crew and emailed to accounts payable for the cleaning team to get paid.
Landscaping Checklist	Check list of expectations for the Landscaping crew. Please report any deficiencies to your territory leader.
Window Cleaning Checklist	Check list of expectations for the window cleaning crew. This must be signed by the window cleaning crew and emailed to accounts payable for the window team to get paid.

Operations Forms

Shortcut	What?
Mileage & Reimbursement Form	Follow the instructions on the form and submit to Accounts Payable for reimbursement
Supply Request Form	Complete and submit the form to keep your location stocked with basic needs.
Community Matters – Donations	Complete and submit the form to donate to a local charity

Human Resources Forms

Shortcut	What?
Emergency Closing	Emergency / Tropical Weather Policy
Incident Report	Incident reporting and documentation from
Performance Improvement Plan	
Corrective Action Form	

Showroom Manager

Showroom Inventory

Shortcut	What?
Replenish Stock	Review store inventory levels and request items to match your stores preferred stock level
Create Transfer Order	Manual enter and request items to transfer to your location
Under Stock Report	Quickly identify items your location is below Preferred Stock levels on
My Store Sales History	Review the transactions by date range that have happened at your location.

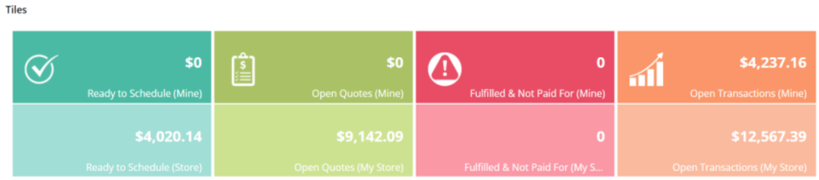
Hiring

Shortcut	What?
Open Positions	
Hiring & Timeline	Complete knowledge base on hiring for a retail location
Interview Guide	An organized worksheet of standard interview questions to give consistency between candidates and allow a retail store manager to share feedback in a consistent way with their territory leader.
Onboarding Checklist	A checklist to make sure all task were completed to onboard a new team member
Status Change Form	Fill out and send to Human Relations to keep a team member record up to date.

Showroom Manager

Shortcut	What?
Time Clock Plus	Log in to the link for our time clock.
KPI Recap Spreadsheet	Key Performance Indicators by store to be used for each Tuesday manager call
Showroom Evaluation	Overview of key points to a successful retail location. This score is used to calculate the showroom manager's bonus.
Manager Override	Report that shows managers their override pay by date range.

6 Tiles



The tiles are open transactions listed by type for you and your store. They should be looked at every morning to give guests the fastest and best experience possible.

The top row, "Mine," will only show your transactions. The bottom row, "Store," will show the transaction for all of the team members assigned to the location.
Please note that if you cover at a different location and write a sale at a different location, the sale will show in the "Mine" tiles and not in the "Store" tiles because the sale was written for a different location.

7 Sales | Tasks (My Showroom)

Top performing showroom teams use Tasks to:

- ✓ Work together to keep a fully recovered showroom
  - Assing projects on the manager's off days
- ✓ To remind each other of important tasks
  - Tagging for a sale
  - Review an incoming transfer
- ✓ To remember to follow up with a guest or supplier

8 Today's Sales & Quotes

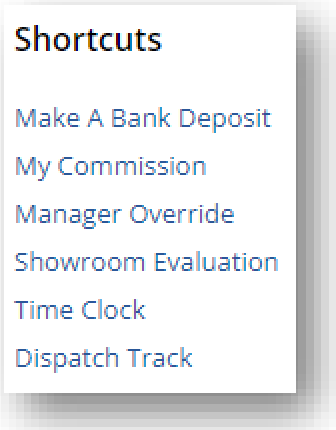
This portlet is an overview of the action around the retail locations for the day. It gives a quick look at what other stores are doing to satisfy curiosity and to help spur competitive spirit.

9 Top 10 Sales Reps By Sales Order (Today)

Daily top 10 list of sales associates by approved sales orders. A quick look of who is on top for the day. Feel free to congratulate them and ask them how they had such a great day.

10 Shortcuts

Shortcuts can be accessed by clicking the at the top of the screen or the link in the Shortcuts portlet on the dashboard home screen.



Shortcut	What?
Make A Bank Deposit	Deposits for cash or checks that have not been brought to the bank.
My Commission	View your commission report for any defined time period.
Manager Override	Accessible to store managers only. See the value of override income for any defined time period.
Showroom Evaluation	Worksheet to measure the success and aptitude of managing a retail showroom.
Time Clock	Shortcut to the time tracking and time off software we use R:\1 About Benefits, Pay and Human Resources\1.4 Time Clock
Dispatch Track	Delivery tracking software where you can review the particulars of each stop including completion and images of the furniture in the delivered space. R:\6 About Delivery, Shipping and Transfers\6.15 Dispatch Track

11 Settings

Please be careful in the Settings menu. You can lock yourself out of NetSuite and even change the way your system works so your experience is less efficient and not the same as your colleagues.

Set Preferences	Leaders recommends that you do not adjust preferences other than the color of your sandbox. Changing your preferences will change your NetSuite experience, and your system may not look or perform like your colleagues'.
Change Email	Do Not Change Your Email Address Here. It will affect your login. Please ask the Human Resources team to update your employee record.
Change Password	Change your password
Reset 2FA	Not Used
Generate 2FA Backup Codes	Not Used
Update Security Questions	Update your security questions that are used to recover a lost password.

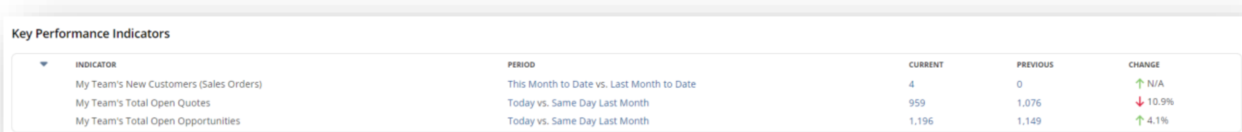
Activities Tab

The activities tab has many helpful tools for advanced users.

- ✓ Calendar
  - An overview of Events, Calls, and Tasks
- ✓ Event
  - Event records reserve time on your calendar for appointments and meetings. When you create an event, you are the owner. If you are invited to an event and accept, you are an attendee. You can click on an event displayed on your calendar to see more information about it, such as the location and a list of invited people.
- ✓ Call
  - Schedule or plan a call to follow up with an opportunity, guest, vendor, or any other phone communication. In a call record, you can take notes and track the date and time of the communication.
- ✓ Task
  - Tasks are activities that need to be completed. Use the task record to add new tasks for individuals, companies, or contacts.

Customers Tab

A quick glance to review summarized information about your team's number of new Sales Orders, Open Quotes, and Open Opportunities against the same time period last month.

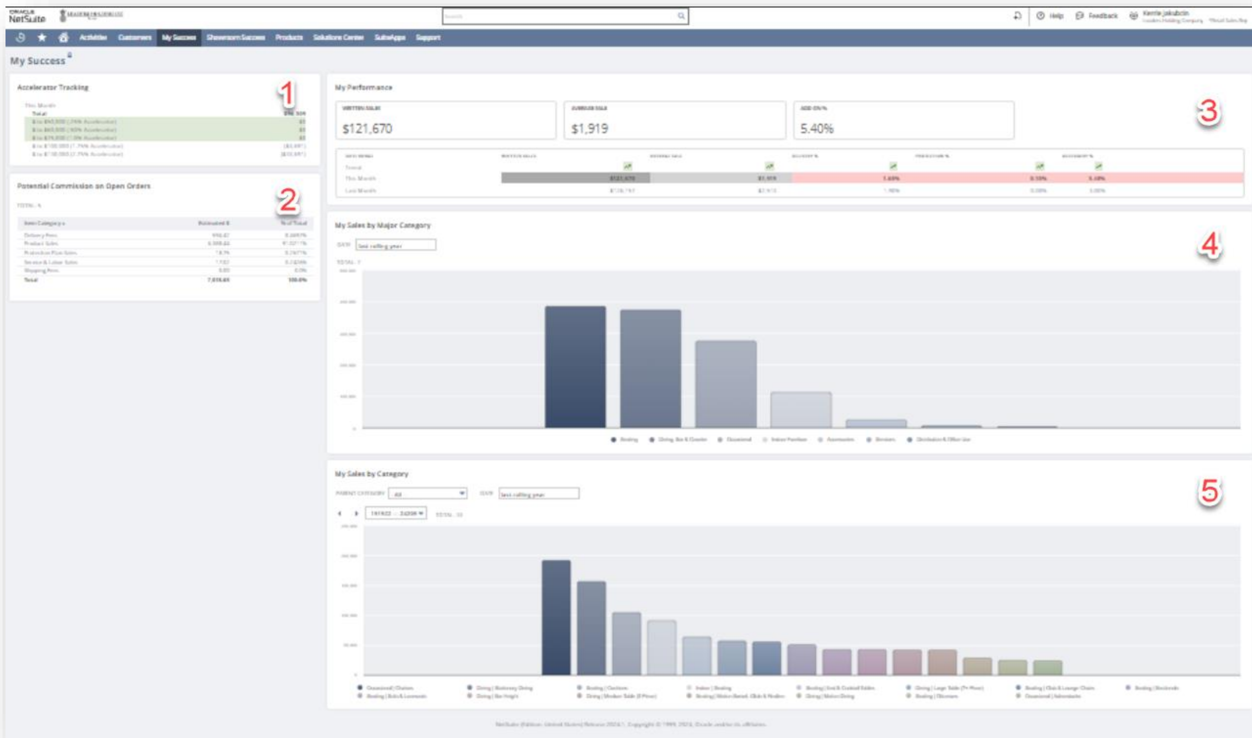


Key Performance Indicators

INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
My Team's New Customers (Sales Orders)	This Month to Date vs. Last Month to Date	4	0	↑ N/A
My Team's Total Open Quotes	Today vs. Same Day Last Month	959	1,076	↓ 10.9%
My Team's Total Open Opportunities	Today vs. Same Day Last Month	1,196	1,149	↑ 4.1%

My Success Tab

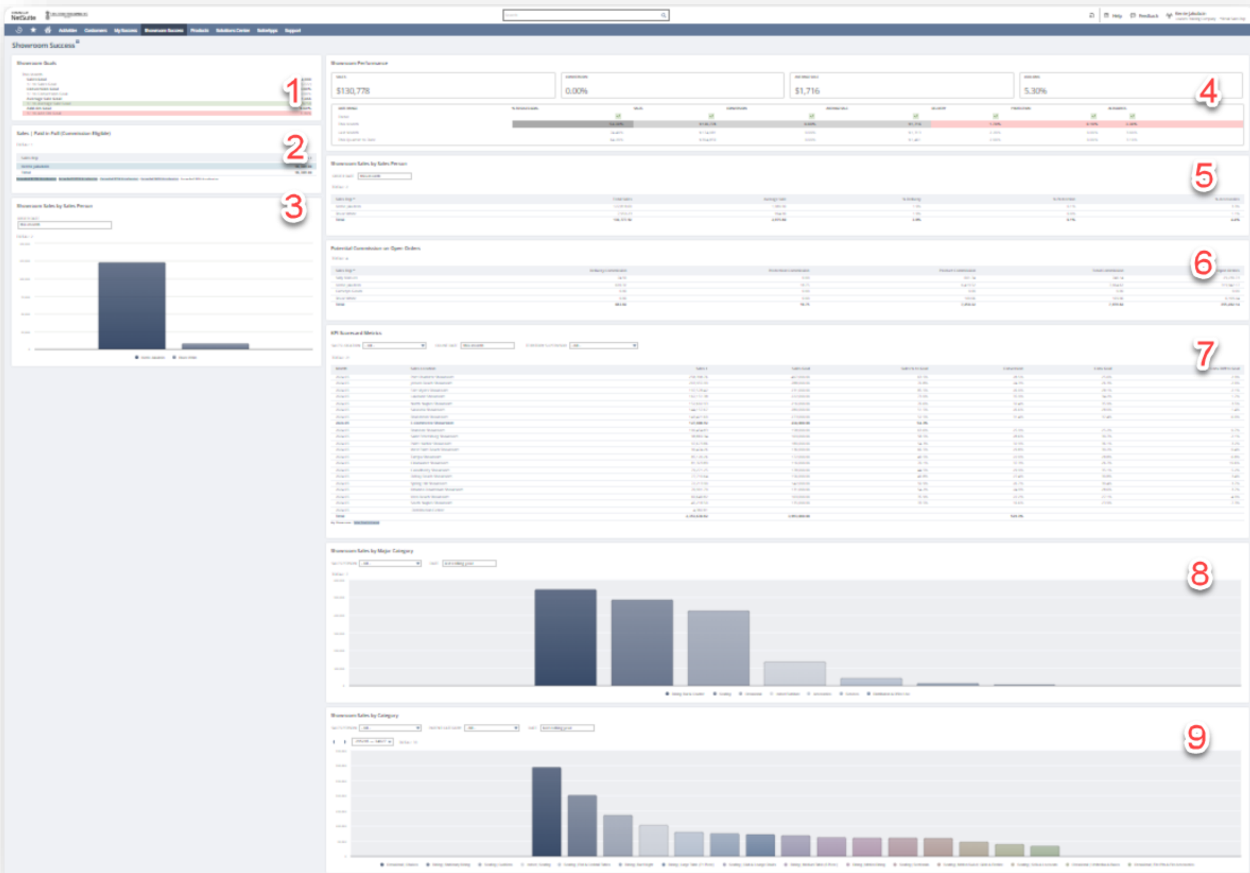
This tab shows your personal success in different categories and helps you identify where you are strong and areas to improve.



	Portlet	What?
1	Accelerator Tracking	A quick reference to the Accelerator Tracking
2	Potential Commission on Open Orders	A forward-looking view of unearned commission on unfulfilled sales orders in your open order report. Leaders pays commission on fulfilled, paid in full sales orders.
3	My Performance	A snapshot of your volume for the month and how your volume this month compares to last month
4	My Sales by Major Category	Your sales by major category. This will help you identify your strengths and areas for improvement.
5	My Sales by Category	Your sales by broken down category. This will help you identify your strengths and areas for improvement.

Showroom Success Tab

The Showroom Success Tab is an overview of your showroom's performance. The default settings are metrics for this month. You can open each report and filter for a different date range.



	Portlet	What?
1	Showroom Goals	Displays where your team is positioned month to date against the showroom's goals
2	Sales | Paid in Full	Total fulfilled volume for the year that counts toward the Presidents Club
3	Showroom Sales by Salesperson	Show who is on top in written sales in your showroom. Sales written while covering at another location will not show in this field.
4	Showroom Performance	Your showroom performance for the month vs last month and the quarter to show your showroom trend
5	Showroom Sales by Sales Person	Shows the written volume by salesperson by showroom.
6	Potential Commission on Open Order	The amount of unfulfilled sales in each team member's open order.
7	KPI Scorecard Metrics	Your showroom's key performance indicators compared to goal
8	Showroom Sales by Major Category	Shows what your showroom is good at selling and clarifies where you can improve.
9	Showroom Sales by Category	Shows what your showroom is good at selling and clarifies where you can improve.

Products Tab

This tab helps you see our stock of fabric. More advanced users like to keep track of our fabric stock to make sure there is enough fabric for their order. This is not necessary; however, we have provided the data. It is very rare that we are out of a fabric.

Fabric Inventory

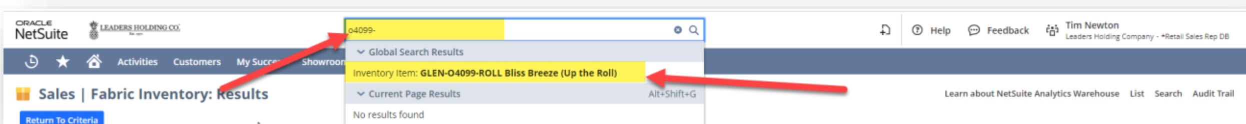
- ✓ Shows the estimated yards we have on hand of each fabric

Central | Open Orders By Yard

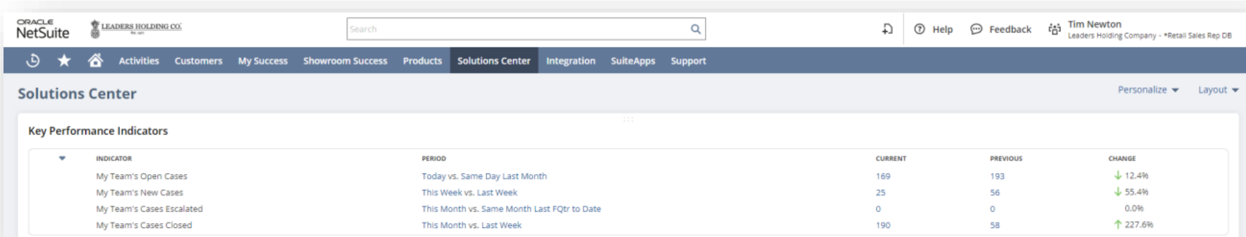
- ✓ This is a report that can be searched by fabric name or number to see how many yards are needed to produce unmade orders.

If the Central | Open Orders by Yard is greater than the Fabric Inventory Yards on Hand (Estimated) amount, we may run out of fabric for your order. You can drill down further by looking up the incoming purchase order of the fabric you are researching.

Type the fabric number you are looking for in the global search at the top of the window, followed by a "-". For example: o4099-



Solutions Center Tab



The Solutions Center Tab gives a quick overview of your team's open case. You can click on any of the lines on the screen to see a summary of your location's open cases, the case status, the last time the case was looked at and who is assigned to the case.