

Helios Release Notes v4.0

STAPLES®
Business Advantage

Learning and Development

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1. Helios Release 1 Notes

Search box enhancements - Accounts can be quickly located by leveraging the Search box feature (Top of the dashboard screen), which is especially useful with large customer lists.

Data Refresh timestamp – almost all the grids on Helios dashboard now have a Date & Time timestamp – states when the data was last refreshed.

User's grid enhancements – The new fields on the grid are “Period to Date”, “No of Orders”, “and Total Spend” for the last 5 years. “Failed searches” and “No Purchase Conversion” are added as part of SA search terms. Additionally, products viewed, abandoned and purchased (in case of Staples.com) are listed for Customer Users. Clicking on SKU URL link opens the exact SKU page on Staples Advantage or Staples.com grid.

Training documents - Training doc links are now available on both Call Order and Dashboard screens. Click  icon to download the documents.

Ship to Grid enhancements - Clicking Ship to tab on the left side of the Dashboard allows associates to access the Ship To details of the customer with 2 years of order and order line sales info.

2. Helios Release 2 Notes

Stores Near By – By default Helios lists out 10 nearest stores within a 10 mile radius. This is shown based on the Customer's Master account zip code. An **advance search** option has been added to facilitate ad-hoc requests. The sales rep can provide an address or zip code (based on Customer ShipTo location zip or Customer's request on the call etc.) to see the 10 nearest stores within a 10 mile radius.

UX Refresh – almost all the pages of Helios application have been refreshed with better visuals and icons. Search feature on top of the dashboard has been enhanced for ASM and hierarchy above. If the Customer is part of your report's BOBs, then you can view the dashboard without switching to the To Do List screen.

Search Enhancements – Blocked & Failed searches has been added as part of this release and showed in alphabetical order. It has been enabled and available for SA customer's user under SA.com Activity even if the SA customer user does not have abandoned cart / viewed SKUs.

Ship To Grid Enhancements – Shows “Order Contact” field which provides the Customer contact who placed the order. The grid has improved search option and allows rep to search Item/SKU # at Ship To Info order header grid level.

Roles Feature - Helios for ASM (Area Sales Manager) and hierarchy (RSD, RVP, VP) above have an additional feature to view their direct reports and corresponding Book of Businesses. By default user will view all accounts rolling into direct reports. After clicking Users link, all direct reports up to sales rep level will be listed.

3. Helios Release 3 Notes

To Do List Screen Enhancements – 3 new fields added to the table. The fields are Customer Segment, Sub Segment and Qualification Score. Associate can select ALL or choose specific categories on the main/sub filters to focus on specific customers.

Minor Enhancements – Customer Profile grid with Master account's address, Gross sales summary for 3 years, Stores nearby, Help section, Call to Action list, Roles feature & Ship To grid enhancements with YOY comparison.









Premium Sales info – Displays Life Time Savings information of Premium customers and category level savings at Order level in both Order and Ship To grids.

User Grid Enhancements – Price and Quantity of cross-shopped SKUs at Staples.com are show for both Purchased and Abandoned products.

4. SBA Differentiators

This grid displays the features used by the customer in last 3 periods and the values are refreshed weekly. For example: If a customer has not used the BOPiS feature, then a RED 'X' mark is shown indicating that the customer has not used the feature within last 3 periods.

- GREY dash shown if Customer is not enabled to use the feature. Applicable only to BOPiS and Print Services
- GREEN check shown if customer used the feature
- RED cross shown if customer not using the feature

SA.com Differentiators ?			
Refreshed: 06-JUN-16 05:27 ET ^			
Feature	Account	Feature	Account
BOPiS		Online Returns	
Shopping Lists		Print Services	
Mobile		Account Maintenance	
SA.com Recommendations		Product Alternatives	

* Flags are based on the previous 3 periods and refreshed weekly.

5. Customer Profile – SFDC Integration

With this release, associate can punch out to SFDC from Helios. By clicking the hyperlink on Customer Name, a new tab opens up showing the account page for this customer in SFDC.

Hyperlink will not be displayed if this customer is not found in SFDC.

Customer Profile »

[WILLIAM L STARK & COMPANY](#)
Customer Number : 1814551
Contract Type : ULPC

Address : PO BOX 911 704 S GARNETT ST
HENDERSON, NC 27536
P. 252.492.0008

6. Users Grid – SFDC Integration

Associates can add new contacts found in the Helios Users grid to SFDC. By clicking “Add new contact to SFDC”, associate is routed to “New Contact Page” in SFDC for that customer. This option appears on the top right of the Users grid. The option will not be shown if no customer match is found in SFDC.

Users »

Add new contact to SFDC

Refreshed: 12-MAY-16 08:30 ET

The Users Section shows all order contacts (customer users) on that account that have either ordered or browsed through SA.com or Staples.com.

Show entries

Filter:

Order Contact	No. Of Orders	Total Spend	No. Of	Last	No. Of Orders	* No. Of	* Total	SA.com	Staples.com
			ts (CFY)	Visit Date	(PTD)	Orders	Spend	Activity	Activity
TRACY MATTHEWS Email: tracy@wstarkco.com Phone: (252) 492-0008	78			2016-05-04	3	20	\$2,695.86	Y	Y

Showing 1 to 1 of 1 entries

* These fields include the last five years data.

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Additionally, when clicking on the User (instead of hover over) the customer user’s contact details are displayed. When the Email address is clicked, an Outlook “New Email” window opens with the user’s email address entered. When user details are available the Contact name appears in blue.

7. “On SFDC” Enhancements

Associate can “Create New Opportunity” and “Log A Task” via Helios. The hyperlinks are shown if the customer is found on SFDC.

When selecting one of these options, the associate is routed to the “New Opportunity Page” or “SBA IAM Task Record Type” page in SFDC for that customer.



8. Returns added to Orders / Ship To Grids

Order Return details have been added to Helios. A new column “RETURNED” displays a cross mark with hyperlink on it if there was a return associated with the order. When clicking the hyperlink, the return item details are shown.

Order Details »						Refreshed: 28-MAY-16 12:15 ET ✕
This section contains a customer's last 2 years of order history.						
View	May / 2016	Filter By	All Purchases	Predefined Filters	All Days	
Show	5	entries	Filter : Enter Order No. OR Item No. OR Item Desc.			
Order No.	RETURNED	Order Date	No. Of Items	Order Total	Order Contact	
7156405414	X	05/18/2016	5	\$79.21	TRACY MATTHEWS	

On click of 'X', return details shown.

Item No.	Return Date	Item description	Qty	Price	Total Spend
900897	05/19/2016	uni-ball Impact Gel Refill, Bold 1.0mm, Black, 2/Pack	1	-\$4.89	-\$4.89

Showing 1 to 1 of 1 entries

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