

# STAPLES®



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## **Helios Training Guide for Dotcom Sales**

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## Lesson 1 – Helios Overview

The Helios tool provides insight into customer purchasing habits and trends, as well as browsing history done on Staples.com. It provides an intuitive 'Call List,' similar to Hawkeye, which allows associates to determine which customers to call next based on priority. These customers are prioritized based on numerous criteria including likelihood to churn, declining/propensity to purchase in a certain category, off cadence, abandoned cart, and low contact coverage. Having more insight into customers' purchasing habits allows associates to tailor their conversations towards the customers' specific business needs and ultimately drive more sales!

Helios enables associates to be a true business consultant by providing data science driven insight on the customers who must be contacted on a daily basis through the 'To Do List'.

### Helios provides the following insight for associates:

- ✓ 360° customer view
- ✓ Cross/up-sell opportunities
- ✓ Prior spending patterns and online activity across Retail and Staples.com sales business units

## Helios Workflow Overview

**Login Page** – The Login Page is the first page which displays when the Helios site is opened.

**To Do List** – The To Do List replicates the current Hawkeye list. It is a list of all the Customers / Accounts assigned to an associate, their book of business (BOB). It is inclusive of the customers' associated customer number and customer contract type, as well as other details.

**Dashboard** – The Dashboard is the main activity area providing a 360 degree view of the customer with access to additional sections and features of the Helios site.

**Users** – The Users section shows all the contacts associated with the customer account along with their Staples.com activity

**Orders** – The Orders section contains the customer's current and last previous year of order history. This is where the associate has the ability to filter and view orders and order details.

**Ship To** – The Ship To section provides the details of customer delivery locations and order information.

**Recommendations** – The Recommendations Section provides purchase history and offers suggested products based on customer buying trends.

**Stores Near By** – The Stores Near By Section displays up to 10 Staples store locations within a 10 mile radius of the customer's Master account number.

**On SFDC** – This area opens Salesforce.com for capturing a new opportunity or task.

## Lesson 2 – Login Process

When using Helios for the first time or when a new Helios release is deployed it is recommended that all cookies and browsing history on the computer, workstation or iPad, be cleared in order to ensure successful login and use.

### Clear Cache

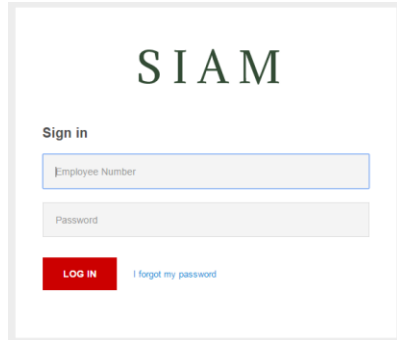
Clearing cache essentially clears browsing history/cookies and will only need to be done once prior to initially accessing the sign on screen. Complete the steps below to clear cache from your Windows Desktop or iPad system.

- **Windows desktop:**
  - Press **control+shift+delete**
  - Under the "Obliterate the following items from" dropdown, select **"The beginning of time"**
  - Select **Clear Browsing Data**

## Logging in

- Open Google Chrome and log in to <http://helios.staples.com/> to access Helios.

**Note:** *Chrome is the preferred browser; using another browser may not be successful.*

The image shows a login interface for SIAM. At the top, the letters "SIAM" are displayed in a large, serif font. Below this, the text "Sign in" is centered. There are two input fields: the first is labeled "Employee Number" and the second is labeled "Password". Below the "Password" field is a red button with the text "LOG IN" in white. To the right of the "LOG IN" button is a link that says "I forgot my password" in a smaller, blue font.

- Enter your 7-digit associate ID in the **Employee Number** field and the your LAN password in the **Password** field; click the **Log In** button
- If the password is forgotten and you are unable to log into Helios, click on **I forgot my password**. You will receive prompts to have your password reset.
- Helios can only be accessed through the Staples network; therefore users must be on the Staples network or VPN to log in.

If you are having difficulty logging in and have already done the outlined troubleshooting; please contact the Helios Help Desk, [helios\\_dotcom\\_appsupt@Staples.com](mailto:helios_dotcom_appsupt@Staples.com)

**NOTE:** *Once logged in, if the screen is blank and you are unable to view any data on the To Do list, refresh the page and content will be displayed.*

## TM Log in

Sales Leaders have the ability to view their direct reports' corresponding Book of Businesses. The To Do List displays ALL accounts within the manager's team

## Logging Out

Since Helios is a read-only system for 360 degree customer insight, information cannot be edited or updated and there is not a logout button. To log out of the system, simply close the Chrome browser window.

## Lesson 3 - To Do List

The **To Do List** displays a prioritized list of all of the Customers / Accounts assigned to the associate, their book of business (BOB), as well as an overview of each account.

STAPLES Business Advantage

You logged in as **Steve Bigenho**

STAPLES.COM

FAQ

Show **10** entries Filter:

Customer Master Rewards#	Master Rewards Tier	Call Order	Company Name	Reason For the Call	Category	Last Contacted Date	Time Zone	Contact Info
4243100767	P15	1	Eric J Brahin Md Plc	Off Cadence		07/15/2016	CST	Eric Brahin Ph: (215) 266-4076
281726729	P15	2	Anesthesia Associates	Off Cadence		01/01/2005	EST	Deidre Okenwall   deidreo@anesthesiah.com Ph: (440) 350-0832
80805583	PG5	3	Ideal Collection Services	Off Cadence		05/11/2016	EST	Shelly Fougerousse   shellyideal@aol.com Ph: (813) 920-0141
2005117367	PG5	4	Collins Butler & Co	Off Cadence		06/02/2016	CST	Sandra Jones   frontdesk@cbco-cpa.com Ph: (580) 233-1144
2220526103	G10	5	Midwest Contracting Inc	Off Cadence		08/17/2016	CST	Colleen Brown   colleen@sigecom.net Ph: (812) 428-2661
3475388108	G10	6	Carl Black	Off Cadence		06/30/2016	CST	Melony Wilson   melonywilson@comcast.net Ph: (615) 662-2384
4257217895	G10	7	Shamrock Foods	Off Cadence		11/21/2016	MST	Michelle Castro   michelle_castro@shamrockfoods.com Ph: (602) 605-3204
4223717333	G10	8	Farmacias Del Pueblo 2	Off Cadence		11/10/2016	EST	Maria Olmos   delpueblo2@msn.com Ph: (973) 523-2070
3023237484	PR7	9	Heritage Family Market	High Propensity to Purchase	Technology	12/19/2016	EST	Paul Beiler   hfm@heritagefamilymarket.com Ph: (540) 473-2917
240752709	P15	10	Mieco Inc.	Abandoned Cart	Ink	06/09/2016	EST	Nancy Schoenhoffer   nschoenhoffer@mieco.com Ph: (973) 733-2771

Showing 1 to 10 of 873 entries

Previous 1 2 3 4 5 ... 88 Next

## Customer Information

The **To Do List** provides important high level information about the account in call order priority.

STAPLES.COM

FAQ

Show **10** entries Filter:

Customer Master Rewards#	Master Rewards Tier	Call Order	Company Name	Reason For the Call	Category	Last Contacted Date	Time Zone	Contact Info
--------------------------	---------------------	------------	--------------	---------------------	----------	---------------------	-----------	--------------

Diagram illustrating the call order priority for the first 10 entries in the To Do List:

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9

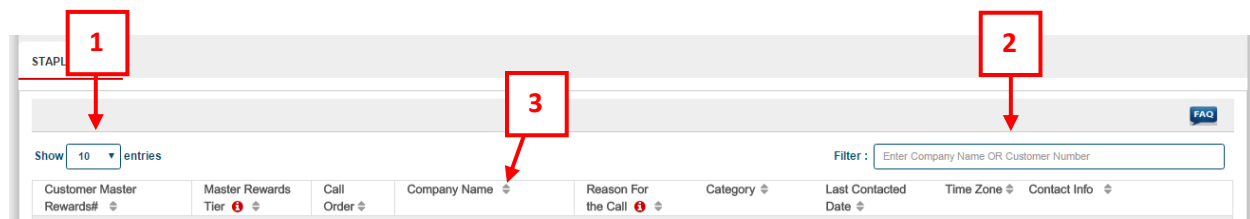
#	Category	Description
1	Customer Master Rewards#	This is the master or parent Rewards membership customer number for this account.
2	Master Rewards Tier	The Staples Rewards program level for this customer. To view Rewards details, select ⓘ and a window with information for each level will popup.
3	Call Order	Prioritized ranking based on data science driven algorithm.
4	Company Name	The name on the master account.
5	Reason for the Call	<p>A Reason Code will display the goal of the call to a rep:</p> <ul style="list-style-type: none"> <li>• High Propensity to Purchase: Browsed but not bought in the last 30 days</li> <li>• Off Cadence: Recent revenue and/or purchase frequency is lower than the customer's average over the past year</li> <li>• Decliner: Customer revenue shows a declining trend over the past 6 months</li> <li>• High Likelihood of Churn: High likelihood that the customer will no longer be active in the next 6 months</li> <li>• Abandoned Cart: SKU added to cart within the last 30 days but not purchased</li> <li>• Low Contact Coverage: 60 or more days since last contact</li> </ul> <p>These details are also provided when the ⓘ is clicked</p>
6	Category	This column represents the category, if applicable, associated with the reason for the call.
7	Last Contacted Date	This column displays the most recent date, as noted in Salesforce.com, the customer was contacted.
8	Time Zone	Provides the account's time zone such as EST, CST, MST, etc.






9	Contact Info	<p>The person's name, email address and phone number of the contact representing this account.</p> <p>Clicking on the email address will open an Outlook email with the contact's email address prepopulated.</p> <div> <p>Joseph Ciechanowicz   <a href="mailto:joecl@optonline.net">joecl@optonline.net</a>  Ph: (631) 427-3363</p> </div> <p>Note: <i>Click-to-call functionality is not available.</i></p>
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## Filter Feature & Sort

Various filter and search features are available on the **To Do List** which provide the ability to narrow down the displayed accounts based on desired categories.



#	Category	Description
1	Show Entries	<ul style="list-style-type: none"> <li>The <b>Show Entries</b> drop-down, by default, shows 10 customers per page with the option to browse additional pages</li> <li>The numbers of entries may be adjusted to 10, 25, 50 or All entries per page by using the <b>Show Entries</b> drop-down</li> </ul>
2	Search	<ul style="list-style-type: none"> <li>Accounts can be quickly located by leveraging the <b>Filter</b> within the To Do List. This can be especially useful with large customer lists because you can easily retrieve the one customer you need.</li> <li>The associate may search by company name or customer number</li> <li>This <b>Search</b> box is a smart search feature that provides search results based on even partial entries  <i>For example: If the associate does not remember the full name of a company, Main Street Vet, the information remembered, Vet, can be entered and the system will provide search results based on the closest matches</i></li> <li>If the associate enters wrong information or information for another associate's customer, a warning message will display and the associate will be unable to access the customer account</li> </ul>

3	Sort	Click the sort icon  on any of the columns to organize the rows in either ascending or descending order. Once selected the icon changes,  or  , to show the order being displayed.
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## Lesson 4 - Customer Dashboard

### Accessing the Dashboard

Once you've reviewed the **To Do List** and determined which customer account to view, access the **Customer Dashboard** by clicking on the applicable **Customer Number** on the left side of the **To Do List**, as shown below:

Show <input type="text" value="10"/> entries				
Customer Master Rewards#	Ma Re Tier		any Name	
3838164808	G10	1	Clc Development Corp	
4098141973	G10	2	East Valley School Dist No 361	

## Dashboard Components

The **Customer Dashboard** provides a complete overview of the respective customer account and their spending history.


The screenshot shows the Staples Business Advantage Customer Dashboard. Red boxes with numbers 1 through 4 highlight specific components:

- 1**: Search bar at the top right.
- 2**: Left sidebar navigation menu.
- 3**: 'On SFDC' section in the left sidebar.
- 4**: 'Sub Rewards' button in the top right corner.

The dashboard content includes:


- CUSTOMER PROFILE >**
  - [Harborview Animal Hospital](#)
  - Master Rewards #: 4024137459
  - Phone: (419) 734-5493
  - Contact Person: Theresa Taylor | tat\_harborview@yahoo.com
  - Enroll date: 09/05/2006
  - Address: 2360 EAST HARBOR RD, PORT CLINTON, OH 43452
  - Tier: G10
  - Industry group: Veterinary Services for Animal Specialties
- Select Fiscal Year To See Report: 2016 Customer Segment: G10 - Premier Gold Rewards Last Contacted Date: 09/26/2016
- 2016 YEARLY SPEND PER CATEGORY > (Pie chart showing a large orange segment and a smaller teal segment)
- Reward Savings (Coming soon!)
- Category Savings

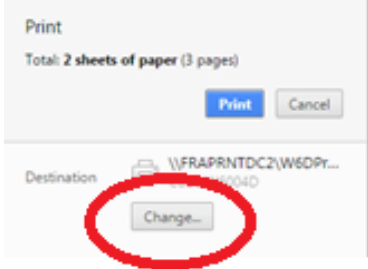
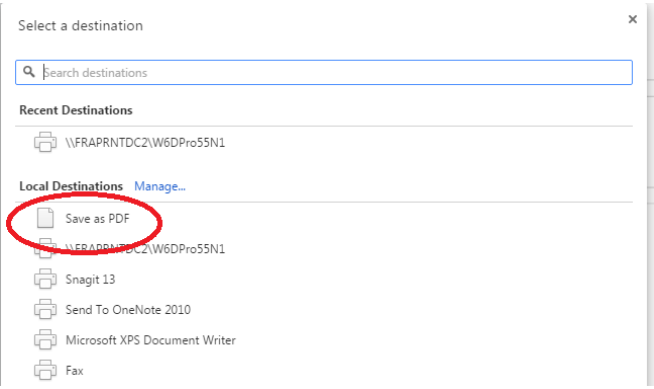
#	Category	Description
1	Dashboard Sections	<p>The <b>Dashboard</b> contains the following sections on the main area which provide a 360 degree view of the account and purchasing history for the last 3 years:</p> <ul style="list-style-type: none"> <li>Customer Profile</li> <li>Yearly Spend Per Category</li> <li>Rewards Savings (coming soon)</li> <li>Category Savings</li> <li>Hawkeye Details</li> <li>Rewards</li> <li>Yearly Spend Per Month</li> <li>Monthly Spend Analysis</li> </ul>
2	Dashboard Tab Sections	<ul style="list-style-type: none"> <li>The Dashboard has <b>Dashboard Tab Sections</b> that access and open up additional sections of the Dashboard screen.</li> <li>These <b>Dashboard Tab Sections</b> highlight additional customer purchasing information categories and will be covered in more depth later in the following lessons of this training guide: <ul style="list-style-type: none"> <li><u>"Users Section"</u></li> <li><u>"Orders Section"</u></li> <li><u>"Ship To Section"</u></li> <li><u>"Recommendations Section"</u></li> <li><u>"Stores Near By Section"</u></li> </ul> </li> </ul>

3	On SFDC	<p>The <b>On SFDC</b> provides quick links to punch-out to Salesforce.com.</p> <ul style="list-style-type: none"> <li>• Create New Opp – opens Salesforce.com login or if already logged on, opens directly to the New Opportunity Page</li> <li>• Log A Task - opens Salesforce.com login or if already logged on, opens directly to the Task Record Type page</li> </ul>
4	 Collapse/Expand Arrows	Each section provides an arrow to collapse or close the section

## Dashboard Navigation

The Dashboard offers several ways for navigation, either by searching or returning to the **To Do List**.

		
#	Category	Description
1	Search Box	<ul style="list-style-type: none"> <li>• Accounts can be quickly located by leveraging the <b>Search</b> box, which is especially useful with large customer lists</li> <li>• The associate may search for existing customers via the <b>Search Box</b> using either a customer number or full customer name.</li> </ul> <p><b>NOTE:</b> When using this <b>Search Box</b> (only the <b>Dashboard</b> Search):</p> <ul style="list-style-type: none"> <li>○ <b>Customer Number</b> – must consist of numbers only, no letters</li> <li>○ <b>Customer Name</b> – must be the exact name; the <b>Search Box</b> within the <b>Dashboard</b> does not provide automatic search suggestions</li> </ul> <ul style="list-style-type: none"> <li>• If the associate enters wrong information or information for another associate's customer, a warning message will display and the associate will be unable to access the customer account</li> </ul>

2	Print or Save as PDF	<p>The Print button allows the associate to print the information displayed on the account Dashboard</p> <p>To save the Dashboard view as a PDF file, select <b>Print</b> and then click the <b>Change</b></p>  <p>button on the print preview page.</p> <p><b>Save as PDF</b> is listed under the <b>Location Destinations</b>.</p> 
3	FAQ	<p>This icon gives you access to Help, FAQ and Training information for the Helios Platform.</p>
4	Home	<p>This icon allows you to return to the <b>To Do List</b> from the <b>Dashboard</b>; click the <b>Back to To Do List</b> button located at the top right of the Dashboard screen.</p>
5	Sliding Door	<p>The small red icon located at the top right corner of the dashboard, <b>Sliding Door</b>, displays a snapshot of the <b>To Do List</b> in call priority order; another way to switch to a different account.</p>

## Lesson 5 - Dashboard Sections

When accessing the Dashboard, the user is presented with six sections on the main dashboard area that provide a 360 degree view of the account and purchasing history. These initial six sections display a snapshot of the last 3 years of purchasing data inclusive of key customer, order, and spend information. The six sections are:

- Customer Profile
- Yearly Spend Per Category
- Rewards Savings (coming soon)
- Category Savings
- Hawkeye Details
- Rewards
- Yearly Spend Per Month
- Monthly Spend Analysis

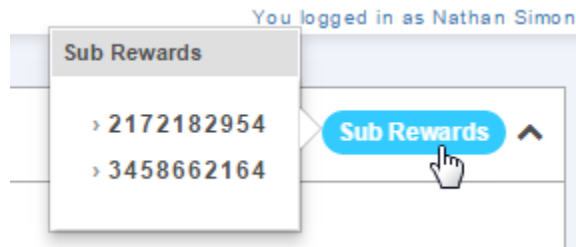
### Customer Profile

The Customer Profile section provides pertinent details about the customer including company name, Rewards number, tier level, enrollment date, address and phone, customer segment and industry.

The screenshot shows the 'CUSTOMER PROFILE' section. At the top left is a header 'CUSTOMER PROFILE »'. At the top right is a button 'Sub Rewards' with an upward arrow. Below the header, the company name 'Harborview Animal Hospital' is a blue hyperlink, with a red box and arrow labeled '1' pointing to it. Below the company name are three columns of information: 'Master Rewards #: 4024137459', 'Enroll date: 06/16/2016', and 'Tier: G10' (with a red box and arrow labeled '2' pointing to it); 'Phone: (419) 734-5493' and 'Address: 2360 EAST HARBOR RD, PORT CLINTON, OH 43450' (with a red box and arrow labeled '3' pointing to the address); and 'Contact Person: Theresa Taylor | tat\_harborview@yahoo.com' and 'Industry group: Veterinary Services / Animal Specialties' (with a red box and arrow labeled '4' pointing to the industry group). At the bottom, there is a row of three items: 'Select Fiscal Year To See Report: 2016' (with a red box and arrow labeled '2' pointing to the dropdown), 'Customer Segment: G10 - Premier Gold Rewards' (with a red box and arrow labeled '3' pointing to the segment name), and 'Last Contacted Date: 09/26/2016' (with a red box and arrow labeled '4' pointing to the date). A red box and arrow labeled '5' points to the 'Sub Rewards' button.

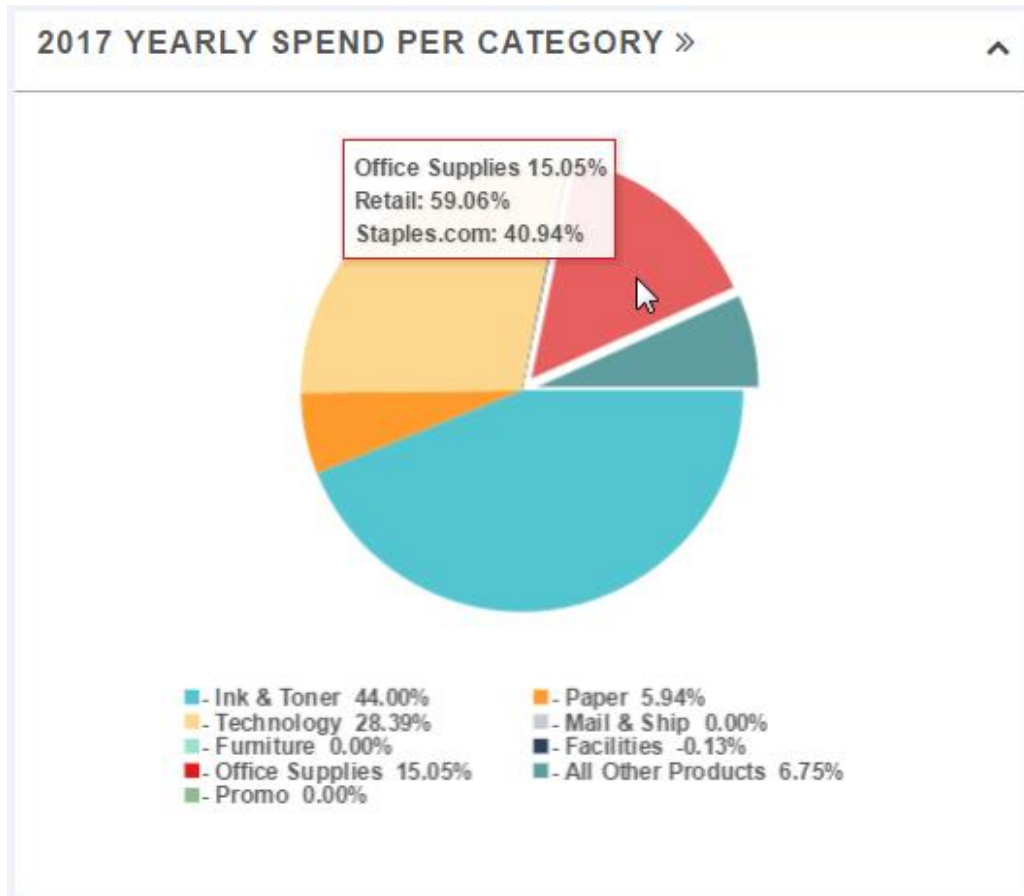
1. Clicking the hyperlink on the Company Name opens the Salesforce.com login page and the Account page. Note: *If you are already logged into Salesforce, the Account page will open directly.*
2. The dropdown in **Select Fiscal Year To See Report** allows you to change the year summarized in the **Dashboard** reports:
  - Yearly Spend Per Category
  - Yearly Spend Per Month
  - Monthly Spend Analysis
3. Click the customer segment to see details on the Rewards benefits for this level.
4. Last Contacted Date is the most recent date, as noted in Salesforce.com, that the customer was contacted.

5. When an account has sub Rewards members the Sub Rewards button appears. Click the button to see the full list of sub Rewards account numbers.



## Yearly Spend Per Category

The **Yearly Spend Per Category** section provides spend analysis for the selected year. Clicking on a specific “piece of the pie” highlights the specific category.



The chart provides the spend percentage per category based on the overall spend for the year in the following nine product categories:

- Ink & Toner
- Paper
- Technology
- Mail and Ship
- Furniture
- Facilities
- Office Supplies
- All Other Products
- Promo



## Rewards Savings

This area will display the savings the customer has received based on their program level.

Reward Savings
Coming soon!

## Category Savings

The year-to-date savings are displayed for each product category along with the benefit program.

Category Savings			
Benefit	Category	Sales Amount	Saving Amount
Platinum 15% Off	Ink	\$384.69	\$67.89
Platinum 15% Off	Toner	\$2183.56	\$385.33
Platinum 15% Off	Paper	\$934.30	\$164.88

## Hawkeye Details

**Hawkeye Details** Refreshed: 10-MAR-17 08:40 ET ^

**Summary**

Potential value  
\$3,156.34

Likelihood to Churn  
Low

High Purchase Category  
Cleaning, Paper

Declining Purchase Category  
Office Essentials, Paper

**Hawkeye Schedule Data**

**PURCHASES**  
Frequency: every 20 days  
Last Purchase: 4 days ago

**BROWSES**  
Frequency: every 11 days  
Last Browse: 4 days ago

**SPENDS** (last 30 days)  
Typical Spend: \$719.00  
Spent: \$58.00

**Staples.com Activity**

SKU#	Browse Date	Unit Price	Activity
202580	03/02/2017	\$4.49	Abandoned
649692	02/16/2017	\$299.99	Abandoned
1386170	02/16/2017	\$249.99	Abandoned
890785	02/16/2017	\$199.99	Abandoned
683059	02/16/2017	\$199.99	Abandoned
586026	02/16/2017	\$69.99	Abandoned

Category data

1. Clicking on the SKU number will open Staples.com to the product's page
2. Click on the product information button to display the product description and category

02/14/2017	\$210.99	Abandoned
<div> <div>Staples 1/2" x 1 3/4", Inkjet/Laser Return Address Labels, White, 2,000/Box (18053/SIWJ090)</div> <div>Category: Office Supplies</div> </div>		
02/09/2017	\$7.59	Abandoned

3. Click on Category data and the area refreshes with the category Hawkeye details:

**Hawkeye Details** Refreshed: 06-MAR-17 11:55 ET ^

**Category data**

Category	Status	Value of contact	Purchased category
Office Essentials	High Propensity to Purchase	\$25	Yes
Paper	Abandoned Cart	\$134	Yes
Toner	Abandoned Cart	\$68	Yes
Technology	High Propensity to Purchase	\$3112	Yes
Toner	High Propensity to Purchase	\$334	Yes
Mail Ship	Abandoned Cart	\$55	No

Hawkeye details

4. Click Hawkeye details to refresh the area back to the main Hawkeye factors

## Rewards

Two years of Rewards statement details are provided:

Rewards »

▼

Show 5 entries

Filter:

Period From	Period To	Statement Amount	Used	Tier Id	Statement Code	Redeemed Member No.	Expiration Date
01/01/2017	01/31/2017	\$10.00	<a href="#">Y</a>	PP5	32*****0263		03/31/2017
01/01/2017	01/31/2017	\$5.00	<a href="#">Y</a>	PP5	31*****2929		03/31/2017
12/01/2016	12/31/2016	\$20.00	<a href="#">Y</a>	PP5	4451910298487550	2957698356	02/28/2017
12/01/2016	12/31/2016	\$25.00	<a href="#">Y</a>	PP5	7856611423774854	2957698356	02/28/2017
11/01/2016	11/30/2016	\$90.00	<a href="#">Y</a>	PP5	6684805809351218	2957698356	01/31/2017

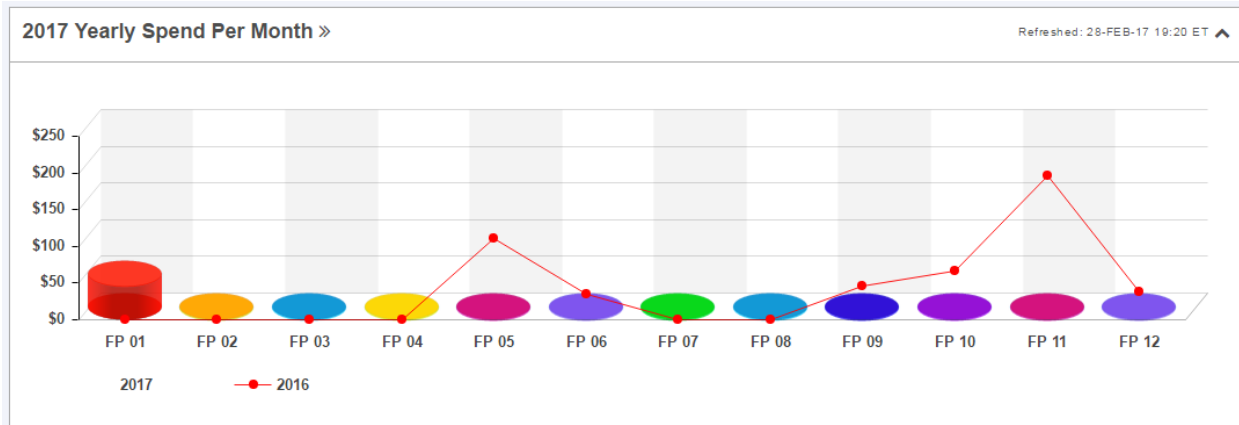
Showing 1 to 5 of 37 entries

Previous12345...8Next

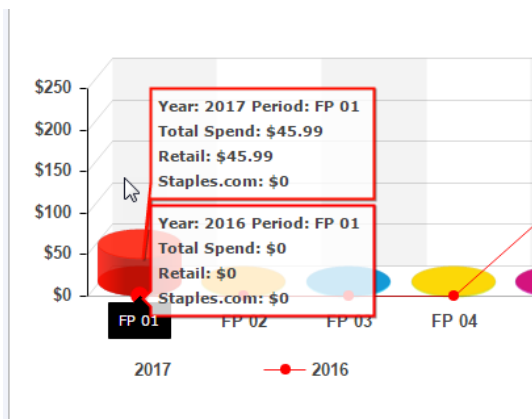
Note: As a Staples security measure, the Statement Code value is masked if it is unused and not expired.

## Yearly Spend Per Month

The **Yearly Spend Per Month** section provides period-over-period spend trend analysis based on each fiscal period (FP) for the account's most recent two years.



- The cylinders show the current year's year-to-date spend per fiscal period and the line presents the previous year's spend per fiscal period
- The associate can toggle any of the years on and off by clicking on the applicable year listed below the graph (i.e. 2017, 2016)
- Hovering the cursor over each cylinder will display the details for that fiscal period:



## Monthly Spend Analysis

The **Monthly Spend Analysis** displays product category level spending analysis for each fiscal period based on the year selected.

2016 Monthly Spend Analysis »										
										Refreshed: 08-MAR-17 13:22 ET ^
										<a href="#">See Retail and Staples.com Sales</a>
Month	Tech	Promo	Print	Paper	Office Supplies	Ink & Toner	Furniture	Facilities	All Other Products	Total
FP 01	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 02	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 03	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 04	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 05	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 06	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 07	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$251.62	\$0.00	\$0.00	\$0.00	\$251.62
FP 08	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$45.99	\$0.00	\$0.00	\$51.73	\$97.72
FP 09	\$0.00	\$0.00	\$0.00	\$95.86	\$21.39	\$0.00	\$0.00	\$0.00	\$0.00	\$117.25
FP 10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 11	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 12	\$0.00	\$0.00	\$0.00	\$64.18	\$0.00	\$170.33	\$0.00	\$0.00	\$0.00	\$234.51
Total	\$0.00	\$0.00	\$0.00	\$160.04	\$21.39	\$467.94	\$0.00	\$0.00	\$51.73	\$701.10

Sales are summarized into nine product categories:

- Tech
- Promo
- Print
- Paper
- Office Supplies
- Ink & Toner
- Furniture
- Facilities
- All Other Products

Similar to the **Yearly Spend Per Month** section, the **Monthly Spend Analysis** section displays each fiscal period thus far in the year selected, along with the purchasing spend per category, as well as total spend for that fiscal period.

1. Select [See Retail and Staples.com Sales](#) to display a breakdown of the customer's spend for each channel, category and fiscal period

1

2017 Monthly Spend Analysis »

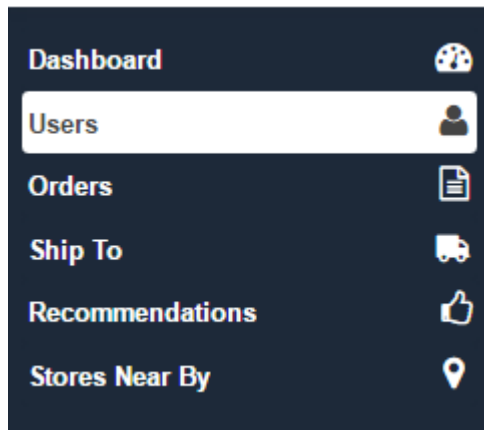
Refreshed: 08-MAR-17 14:23 ET ^

RetailStaples.com

☒ See Retail and Staples.com Sales

Month	Tech	Promo	Print	Paper	Office Supplies	Ink & Toner	Furniture	Facilities	All Other Products	Total
FP 01	\$127.49	\$0.00	\$0.00	\$0.00	\$0.00	\$488.94	\$0.00	\$0.00	\$0.00	\$616.43
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$127.49	\$0.00	\$0.00	\$0.00	\$0.00	\$488.94	\$0.00	\$0.00	\$0.00	\$616.43
FP 02	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 03	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 04	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
FP 05	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

## Lesson 6 – Users Section

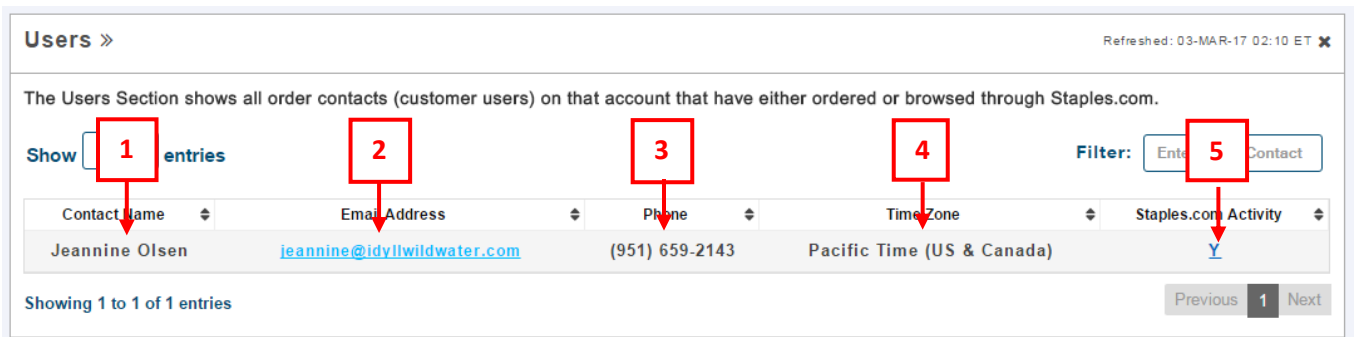


Clicking the **Users** tab on the left side of the Dashboard will allow associates to access the **Users Section** directly on the main **Dashboard** page.

The **Users Section** shows the contacts (customer users) associated with the program.

### Users Information

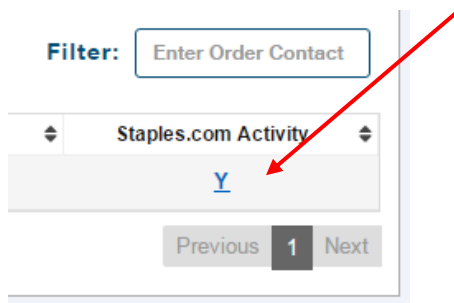
The **Users Section** contains the following information for each contact:



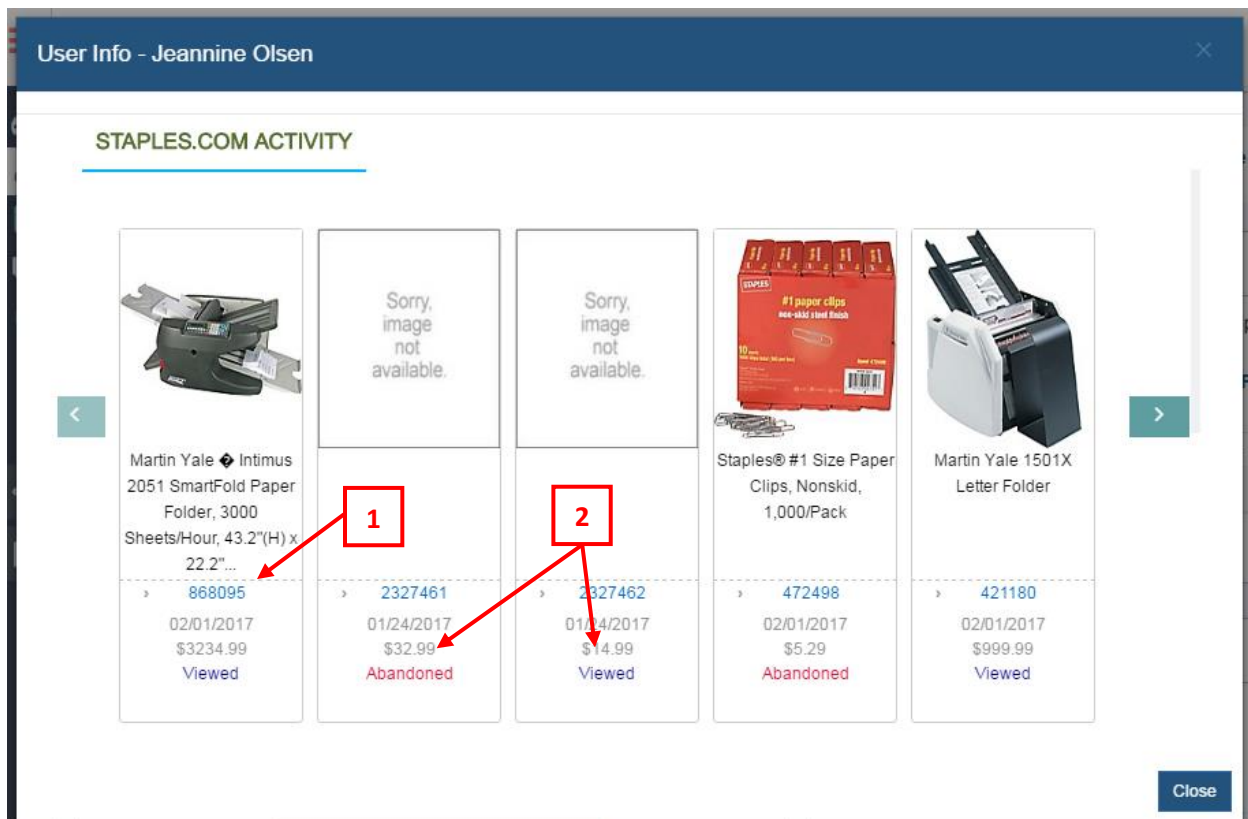
	Category	Description
1	Contact Name	The name of the customer user or order contact.
2	Email Address	The email address for this user. Click on the address and an Outlook email opens addressed to this contact.
3	Phone	The contact's telephone number
4	Time Zone	The geographic area for this contact.

5	Staples.com Activity	<ul style="list-style-type: none"><li>This column will display a Yes(Y) or No(N) showing if the user has been accessing and purchasing products on Staples.com</li><li>If there has been customer activity, clicking on the <b>Y</b> hyperlink within the <b>Staples.com Activity</b> column will access the <b>User Info Search String</b> pop-up window</li><li>Refer to the <a href="#">User Info</a> details on the Staples.com <b>window</b></li></ul>
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## User Info -Staples.com Activity



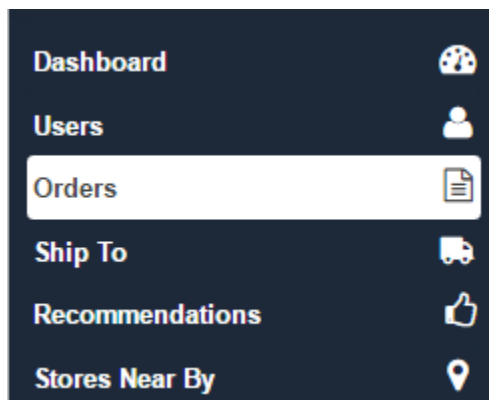
The **User Info** window will appear when a user clicks on “Y”





	Category	Description
1	Product Details	Select the SKU to open the item's page on Staples.com
2	Staples.com Activity	The <b>Staples.com Activity</b> window lists product SKU's that were <ul style="list-style-type: none"><li>• Viewed</li><li>• Abandoned</li></ul>

## Lesson 7 - Orders Section



Clicking the **Orders tab** on the left side of the Dashboard displays the **Orders Section** directly on the main **Dashboard** page.

## Order Details Information

The **Orders Section** provides information regarding the customers' orders, including Order Number, Order Date, Number of Items and Order Total.

ORDER DETAILS » Refreshed: 08-MAR-17 14:55 ET ✕

This section contains a customer's last 2 years of order history.

View: Oct / 2016 Filter By: All Purchases Predefined Filters: All Days

Show: 1 entries

Reward #	Order No.	Order Date	No. Of Items	Order Total	Discounts	Coupons	Order Contact
2001058409 M	<a href="#">POS_640_2_35431</a>	10/26/2016	1	\$345.30	\$275.00	\$0.00	DANIEL WAMSLEY
2001058409 M	<a href="#">9745165680</a>	10/13/2016	1	\$86.04	\$0.00	\$0.00	DANIEL WAMSLEY

Showing 1 to 2 of 2 entries Previous 1 Next

	Category	Description
1	Rewards Number	<ul style="list-style-type: none"> <li>The Rewards # column displays the member number used in the sales transaction. The letter after the number signifies M for Master number and S for Sub-member number used.</li> </ul>
2	Order No.	<ul style="list-style-type: none"> <li>The <b>Order Number</b> column provides the associated order number for orders/sales transactions placed on the account</li> <li>Clicking on the <b>Order No.</b> hyperlink will access an <b>Order Details</b> pop up window that displays information pertaining to that order inclusive of: <ul style="list-style-type: none"> <li>Item or product Numbers</li> <li>Item Descriptions</li> <li>Quantities</li> <li>Discount Amounts</li> <li>Coupon Amounts</li> <li>Total Spend</li> <li>Status of Order – this will be blank for retail transactions</li> </ul> </li> <li>The <b>Order Details</b> pop up window also features a Search option that allows the associate to look up specific product types within orders to determine whether or not the customer has purchased those specific items or not.</li> </ul> <p>Note: If there is a return associated with the order (R) is displayed</p>
3	Order Date	The <b>Order Date</b> column displays the date that the respective order was placed
4	No. of Items	The <b>No. of Items</b> column displays the number of items purchased in the specific order

5	Order Total	The <b>Order Total</b> column displays the total spend amount of the corresponding order
6	Discounts	This column provides the total amount of any discounts, including BPD, special pricing, etc. applied to the purchase
7	Coupons	This column displays the total amount of any coupons applied to the purchase
8	Order Contact	The name displayed in this column is the person who placed the order or, for Retail transactions, is identified with the Master account.
9	Store Number	The store number for POS transactions is displayed in red within the Order No. For example, POS. <b>640</b> .2.35431 where 640 is the Staples store number.

## Orders Details – Filter Options

The **Orders Details** section has several additional features for filtering, searching and navigation.

The screenshot shows the 'ORDERS DETAILS' section with the following features highlighted by numbered callouts:

- 1**: 'ORDER DETAILS' header with a refresh icon.
- 2**: 'This section contains a customer's last 2 years of order history.' text.
- 3**: 'Refreshed: 08-MAR-17 14:55 ET' status.
- 4**: 'View' dropdown menu set to 'Oct / 2016'.
- 5**: 'Filter By' dropdown menu set to 'All Purchases'.
- 6**: 'Predefined Filters' dropdown menu set to 'All Days'.

Below the filters, there is a 'Show 5 entries' dropdown and a 'Filter:' search box with the placeholder text 'Enter Order No. OR Item No. OR Item Desc'.

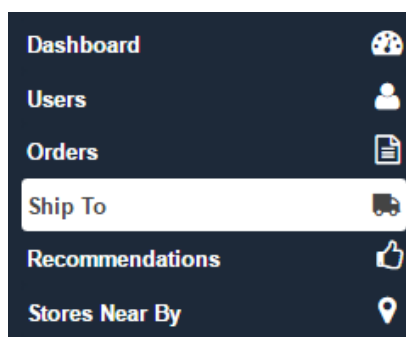
Reward #	Order No.	Order Date	No. Of Items	Order Total	Discounts	Coupons	Order Contact
2001058409 M	<a href="#">9745661834</a>	10/26/2016	1	\$345.30	\$275.00	\$0.00	DANIEL WAMSLEY
2001058409 M	<a href="#">9745165680</a>	10/13/2016	1	\$86.04	\$0.00	\$0.00	DANIEL WAMSLEY

Showing 1 to 2 of 2 entries

Navigation: Previous 1 Next

	Category	Description
1	View	The <b>View</b> drop-down menu provides the ability to refine order detail search by month, year or desired time spans.
2	Filter By	The <b>Filter By</b> drop-down menu allows associates to filter orders by product categories
3	Predefined Filters	The <b>Predefined Filters</b> drop-down menu provides the option to filter by preset time periods of 30, 60 and 90 days
4	Show Entries	The <b>Show Entries</b> drop-down menu allows associates to set the Order Details page to display 5, 10, 30, 40 or all order entries per page
5	Filter	<p>The <b>Filter</b> field allows associates to refine the displayed order list by Order No. OR Item Description.</p> <ul style="list-style-type: none"> <li>For example: If the associate wanted to uncover if (or when) the customer purchased paper products, they could enter 'paper' into the Search field and the order list will display all purchases that included paper.</li> </ul>
6	Navigation	The <b>Navigation</b> bar located at the bottom right of the <b>Order Details</b> screen allows associates to go to next, last, or selected page from the order list.

## Lesson 8 - Ship To Section



Clicking the **Ship To tab** on the left side of the Dashboard will display the **Ship To section** directly on the main **Dashboard** page.

## Ship To

The Ship To Section provides details on the customers' Ship to Address or Addresses.

SHIP TO » Refreshed: 03-MAR-17 10:29 ET ✕

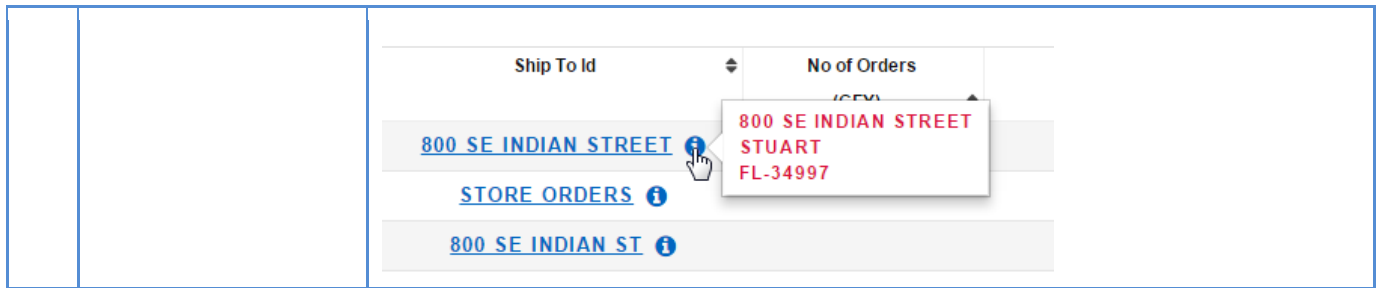
This section provides details of customer orders and shipping information

Show **5** entries Filter:

Ship To Id	No of Orders (CFY)	\$ Spent (CFY)	No of Orders (LFY)	\$ Spent (LFY)	YOY % Change
<a href="#">2650 GALVIN DR.</a> <i>i</i>					
<a href="#">1610 WILSHIRE BOULEVARD</a> <i>i</i>			2	\$95.38	-100
<a href="#">EMPTY LOCATION</a> <i>i</i>			2		
<a href="#">225 ARIZONA AVE.</a> <i>i</i>			5	\$1,046.95	-100
<a href="#">225 ARIZONA AVE</a> <i>i</i>	5	\$889.98	38	\$3,807.99	-76

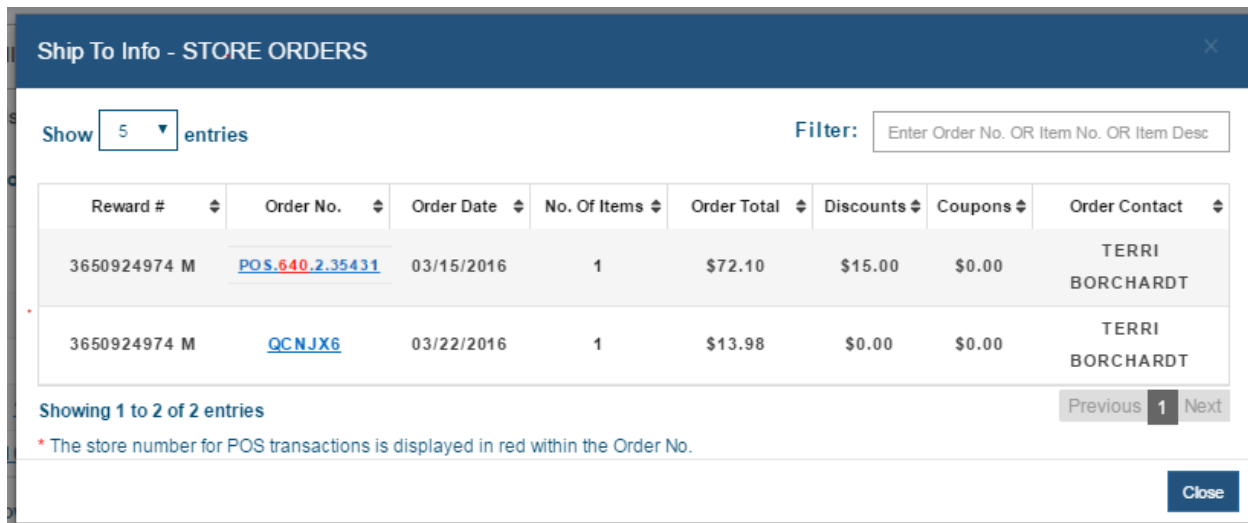
Showing 1 to 5 of 7 entries Previous 1 2 Next

	Category	Description
1	Ship To ID	The <b>Ship To ID</b> provides the name of the shipping contact for that order on Staples.com. Click the ID hyperlink opens the <a href="#">Ship To Info</a> page containing the orders for this location.
2	No. of Orders (CFY)	<b>No. of Orders (CFY)</b> displays the <b>Number of Orders</b> placed by the respective Ship To Id within the current fiscal year
3	\$ Spent (CFY)	<b>\$ Spent (CFY)</b> provides the Ship To Id's total spend amount from all orders within the current fiscal year
4	No. of Orders (LFY)	<b>No. of Orders (LFY)</b> lists the number of orders placed by the respective Ship To Id within the last fiscal year
5	\$ Spent (LFY)	<b>\$ Spent (LFY)</b> displays the Ship To Id's spend amount from all orders thus far within the last fiscal year
6	YOY % Change	<b>YOY % Change</b> compares Last Fiscal Year sales with Current Fiscal Year sales (To Date). The values will range from -100 to +100%.. <i>The data pertaining to last year vs. this year's order history is a great talking point for customers that have had a decline in purchases made by the Ship To Id.</i>
7	<i>i</i> Ship To ID info icon	The <b>Information</b> icon displays the shipping address for the selected ID

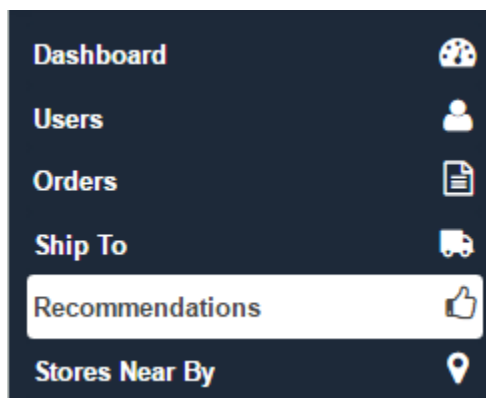


## Ship To Info

The Ship To Info lists the order detail information for the particular shipping location. Click on the Order No. to view the details of each order.



## Lesson 9 - Recommendations Section



The **Recommendations** tab on the left side of the Dashboard allows associates to access the **Recommendations** section directly on the main **Dashboard** page.

The **Recommendations** section provides three sub-sections – **Up-Sell**, **Cross-Sell** and **Reorder** recommendations, which are detailed below.

## Accessing the Recommendations Section

- Unlike all of the other **Dashboard** sections, the **Recommendations** section does not get added to the currently active Dashboard sections; it “closes” them when it is accessed
- To view any of the other **Dashboard** or **Tab Sections** after opening the **Recommendations** section, click the desired Tab(s) on the sidebar to re-access them
- Selecting/clicking on any of the other three sidebar tabs, **Users / Orders / Ship To**, will open those sections along with the **Recommendations** section
- Selecting/clicking on the Dashboard tab will close all sections that are currently open


Note: To view the product on Staples.com, click the SKU number. Click the left or right arrows to page through the recommendations. ➤

## Up-Sell

The Up-Sell pane displays up to 15 products the customer has viewed, abandoned or purchased with up to three recommendations with up-sell potential.

UP-SELL

Refreshed: 17-APR-17 10:54 ET




➤ 503068

DotCom NOW: 4.59

Tier Price: 4.59

BAND-AID Brand TOUGH-STRIPS Adhesive Bandages, 1" x 3-1/4", 20 Count/Box (Model: 4408)

Viewed




➤ 802137

DotCom NOW: 4.79

Tier Price: 4.79

Band-Aid® Brand Flexible Fabric Extra Large Adhesive Bandages 1-1/4" x 4"

Sell




➤ 556241

DotCom NOW: 10.79

Tier Price: 10.79

BAND-AID® Brand Flexible Fabric Adhesive Bandages, 100 Count/Box (Model: 4444)

Sell



➤ 507516

DotCom NOW: 6.59

Tier Price: 6.59


BAND-AID Brand Adhesive Bandages Plus Antibiotic, Assorted Sizes, 20 Count/Box (Model: 5570)

Sell


## Cross-Sell

The Cross-Sell pane displays up to 15 products the customer has purchased, abandoned or viewed with up to three recommendations that complement the product.


**CROSS-SELL** Refreshed: 17-APR-17 10:56 ET




> 478405  
DotCom NOW: 6.296.29  
Tier Price: 6.29  
Dixie PerfectTouch 12 oz. Hot Cups  
50/Pack  
**Abandoned**



> 821596  
DotCom NOW: 3.99  
Tier Price: 3.99  
Dixie Dome Drink-Thru Lid for 10-16oz PerfectTouch Hot Cups and 12-20oz Dixie Paper Hot Cups, 50/Pack (9542500DX)  
**Sell**



> 470743  
DotCom NOW: 6.99  
Tier Price: 6.99  
Nestlé® Coffee-mate® Liquid Coffee Creamer Singles, Original, 50/Box  
**Sell**




> 328423  
DotCom NOW: 13.29  
Tier Price: 13.29  
Dixie Pathways™ Medium Weight Paper Plates, 8 1/2", 125/Pack  
**Sell**


## Reorder Pane

The Reorder Pane provides associates with the opportunity to suggest additional products based on the customer's purchasing trends.


**REORDER** Refreshed: 17-APR-17 10:56 ET



> 180483  
DotCom NOW: 21.49  
Tier Price: 21.49  
Zebra Z-Grip Max Retractable Ballpoint Pens with Pink Ribbon Imprint, 1.2mm, Black, 24/Pack  
**Sell**



> 811534  
DotCom NOW: 16.99  
Tier Price: 16.99  
SOLO® Trophy® Bistro™ Foam Hot Cups with Lids, 12 oz., 50/Pack  
**Sell**

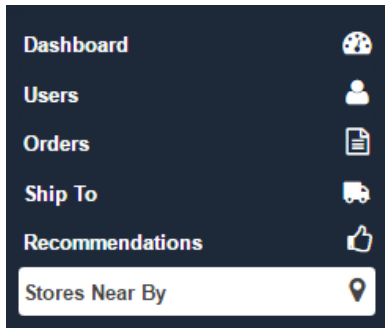


> 228452  
DotCom NOW: 16.29  
Tier Price: 16.29  
Paper Mate® Flair® Felt-Tip Pens, Medium Point, Black, 12/pk (8430152)  
**Sell**

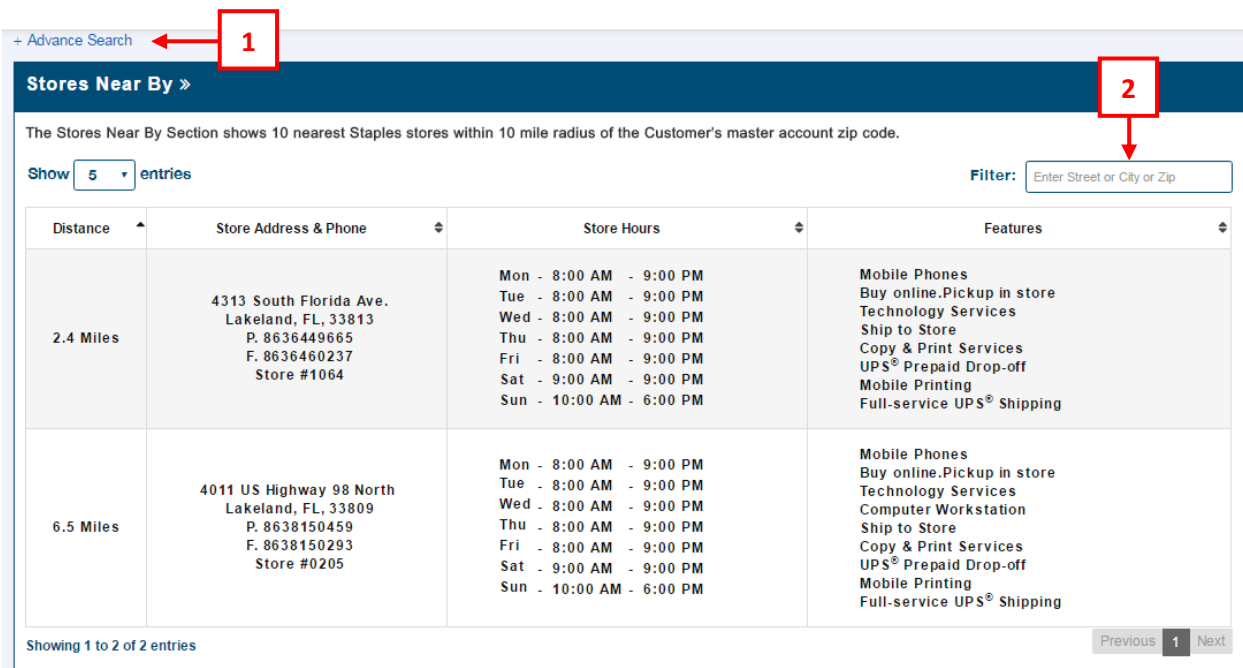
- The **Reorder Pane** displays products that customer has purchased in the past and is most likely to reorder soon
- The products are listed by the date that the customer is most likely to purchase, in descending order starting with the most recent product to be purchased



## Lesson 10 – Stores Near By Section



The **Stores Near By** tab on the left side of the Dashboard displays the **Stores Near By** section on the main Dashboard page.



The Stores Near By Section shows 10 nearest Staples stores within 10 mile radius of the Customer's master account zip code.

Show **5** entries

Filter:

Distance	Store Address & Phone	Store Hours	Features
2.4 Miles	4313 South Florida Ave. Lakeland, FL, 33813 P. 8636449665 F. 8636460237 Store #1064	Mon - 8:00 AM - 9:00 PM Tue - 8:00 AM - 9:00 PM Wed - 8:00 AM - 9:00 PM Thu - 8:00 AM - 9:00 PM Fri - 8:00 AM - 9:00 PM Sat - 9:00 AM - 9:00 PM Sun - 10:00 AM - 6:00 PM	Mobile Phones Buy online.Pickup in store Technology Services Ship to Store Copy & Print Services UPS® Prepaid Drop-off Mobile Printing Full-service UPS® Shipping
6.5 Miles	4011 US Highway 98 North Lakeland, FL, 33809 P. 8638150459 F. 8638150293 Store #0205	Mon - 8:00 AM - 9:00 PM Tue - 8:00 AM - 9:00 PM Wed - 8:00 AM - 9:00 PM Thu - 8:00 AM - 9:00 PM Fri - 8:00 AM - 9:00 PM Sat - 9:00 AM - 9:00 PM Sun - 10:00 AM - 6:00 PM	Mobile Phones Buy online.Pickup in store Technology Services Computer Workstation Ship to Store Copy & Print Services UPS® Prepaid Drop-off Mobile Printing Full-service UPS® Shipping

Showing 1 to 2 of 2 entries

Previous **1** Next

The **Stores Near By** grid displays up to 10 Staples Stores located within 10 miles of the Master account's zip code.

**NOTE:** *If there are no stores located within radius or if Helios has no Master account zip code, Helios will display message "No stores within 10 miles of master account's zip code"*

1. To search for Staples Stores in other locations, click **"+Advance Search"** to expand; continue to search by entering Address, State, Zip.
2. To narrow the search results, enter Street, City or Zip into the **"Filter"** box.