# Helios Training Guide

# for Dotcom Sales

Learning and Development

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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.

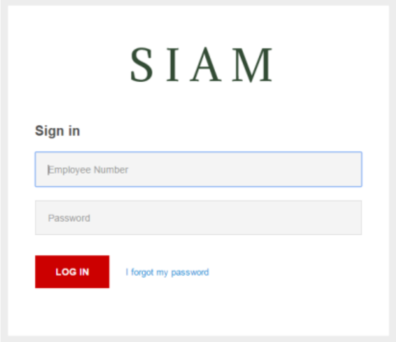
## Clear Cache

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.*




- 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

**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

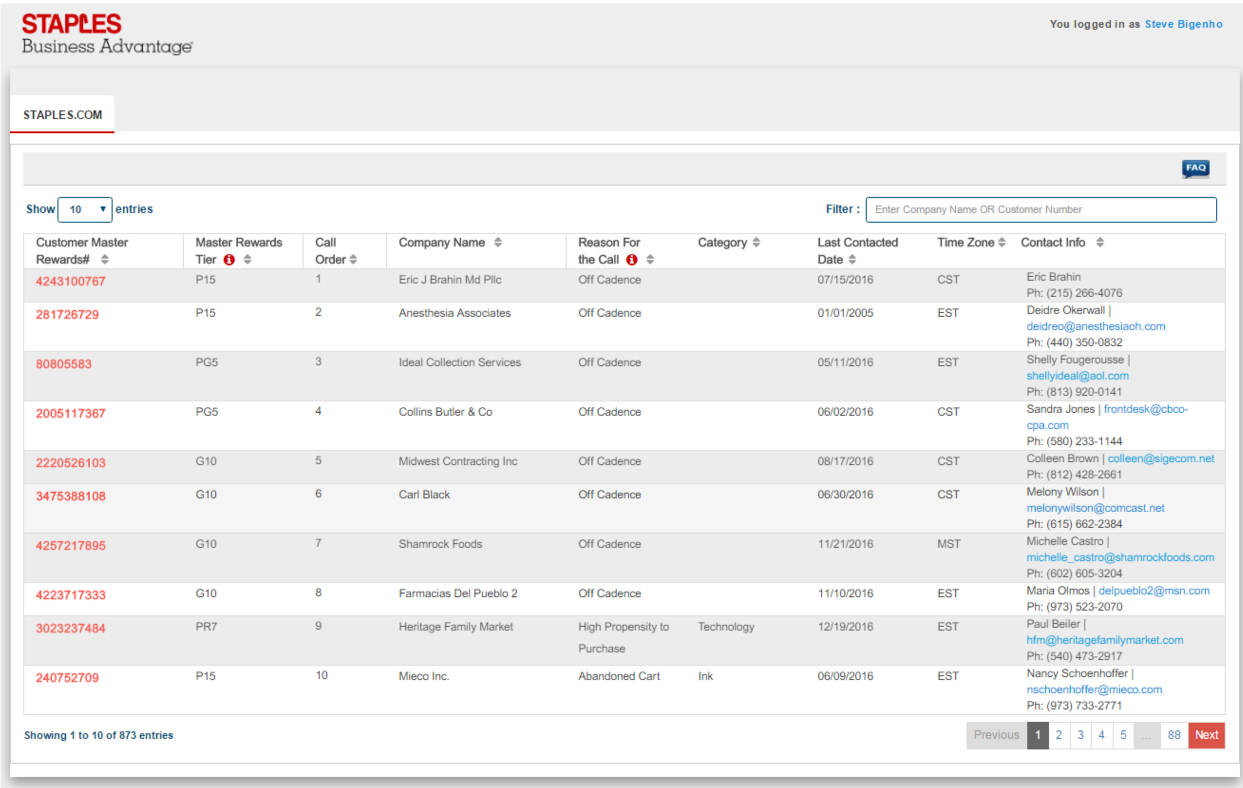
Sales Leaders have the ability to view their direct reports' corresponding Book of Businesses. The To Do List displays ALL accounts within the manager's team

## 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

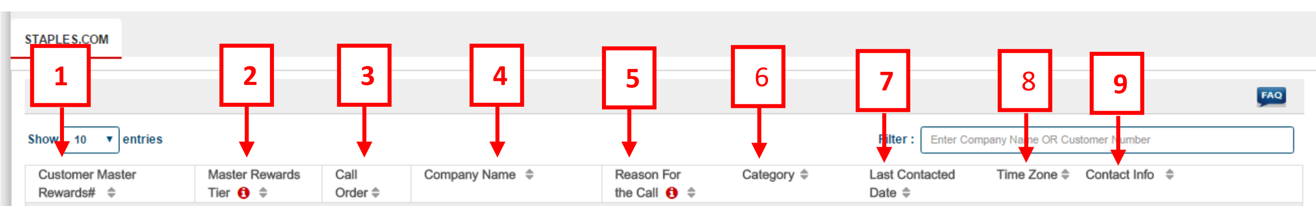
The **To Do List** displays a prioritized list of all of the Customers / Accounts assigned to the associate, their book of business (BOB), as well as an overview of each account.



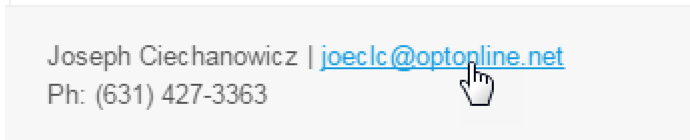

| Customer Master Rewards# | Master Rewards Tier | Call Order | Company Name | Reason For the Call | Category | Last Contacted Date | Time Zone | Contact Info |
|---|---|---|---|---|---|---|---|---|
| 4243100767 | P15 | 1 | Eric J Brahin Md Pllc | Off Cadence | | 07/15/2016 | CST | Eric Brahin Ph: (215) 266-4076 |
| 281726729 | P15 | 2 | Anesthesia Associates | Off Cadence | | 01/01/2005 | EST | Deidre Okerwall \| deidreo@anesthesiaoh.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 |

## Customer Information

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



| # | 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 ℹ 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 | A Reason Code will display the goal of the call to a rep:<br>• High Propensity to Purchase: Browsed but not bought in the last 30 days<br>• Off Cadence: Recent revenue and/or purchase frequency is lower than the customer's average over the past year<br>• Decliner: Customer revenue shows a declining trend over the past 6 months<br>• High Likelihood of Churn: High likelihood that the customer will no longer be active in the next 6 months<br>• Abandoned Cart: SKU added to cart within the last 30 days but not purchased<br>• Low Contact Coverage: 60 or more days since last contact<br>These details are also provided when the ℹ is clicked |
| **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 | The person's name, email address and phone number of the contact representing this account.<br>Clicking on the email address will open an Outlook email with the contact's email address prepopulated.<br><br>Note: *Click-to-call functionality is not available.* |

## 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.

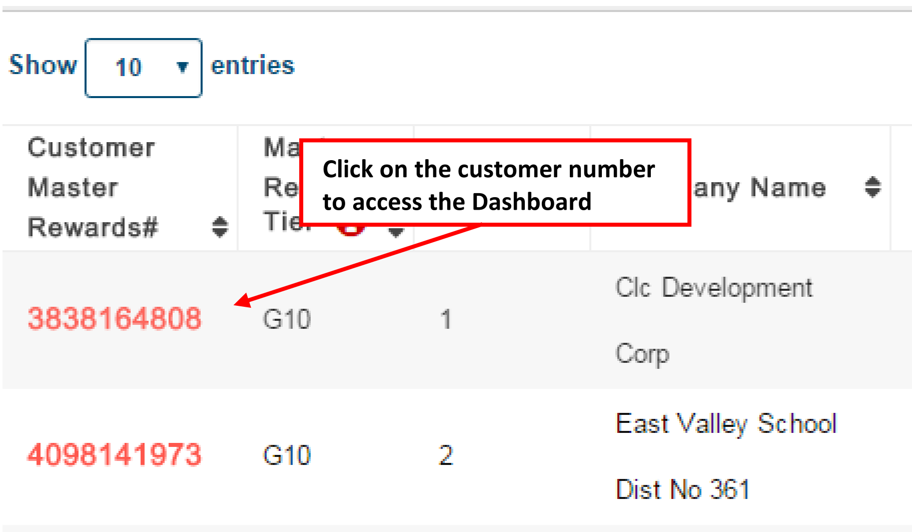

| # | Category | Description |
|---|---|---|
| **1** | Show Entries | • The **Show Entries** drop-down, by default, shows 10 customers per page with the option to browse additional pages<br>• The numbers of entries may be adjusted to 10, 25, 50 or All entries per page by using the **Show Entries** drop-down |
| **2** | Search | • Accounts can be quickly located by leveraging the **Filter** within the To Do List. This can be especially useful with large customer lists because you can easily retrieve the one customer you need.<br>• The associate may search by company name or customer number<br>• This **Search** box is a smart search feature that provides search results based on even partial entries<br>*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*<br>• 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 |

| | | |
|---|---|---|
| **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. |

## Lesson 4 - Customer Dashboard

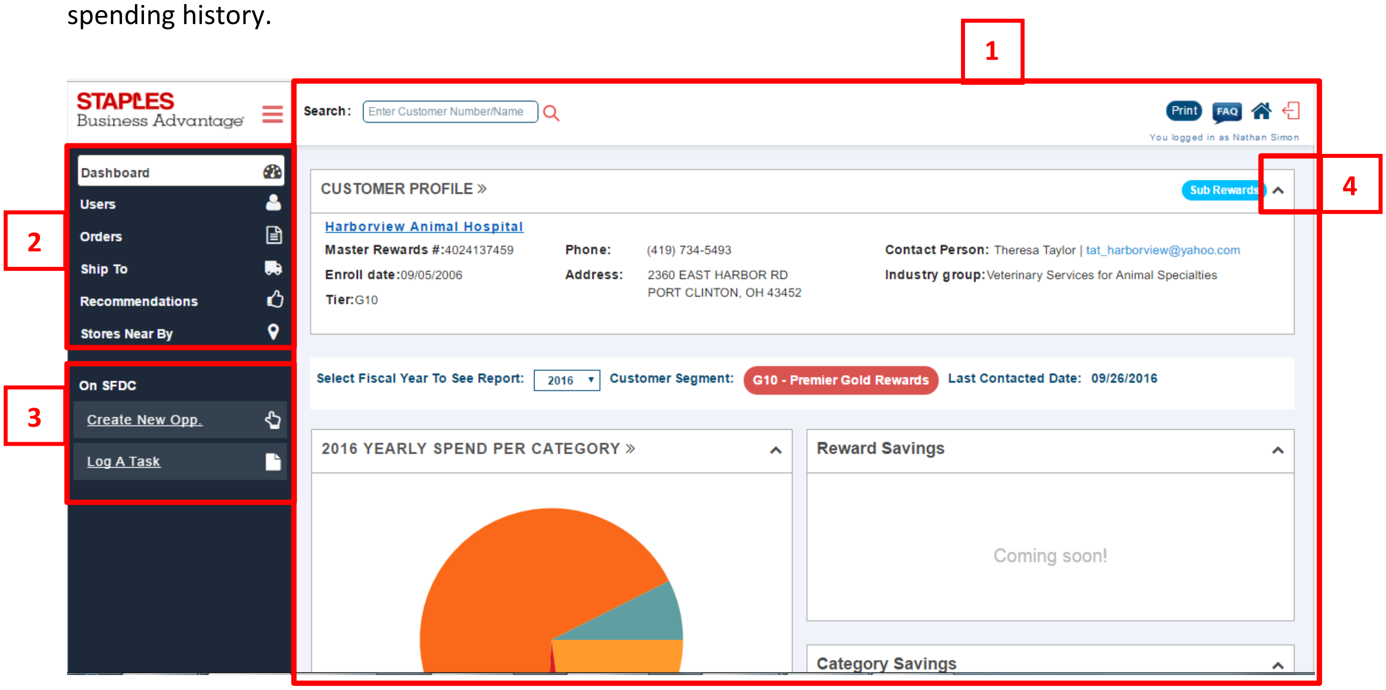
### Accessing the Dashboard

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:



## Dashboard Components

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

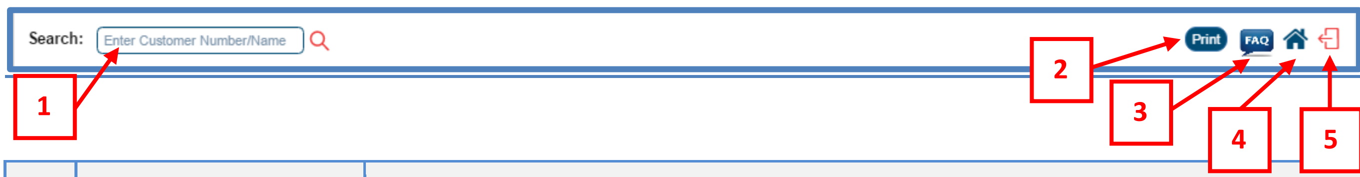



| # | Category | Description |
|---|---|---|
| **1** | Dashboard Sections | The **Dashboard** contains the following sections on the main area which provide a 360 degree view of the account and purchasing history for the last 3 years:<br>▪ Customer Profile<br>▪ Yearly Spend Per Category<br>▪ Rewards Savings (coming soon)<br>▪ Category Savings<br>▪ Hawkeye Details<br>▪ Rewards<br>▪ Yearly Spend Per Month<br>▪ Monthly Spend Analysis |
| **2** | Dashboard Tab Sections | • The Dashboard has **Dashboard Tab Sections** that access and open up additional sections of the Dashboard screen.<br>• These **Dashboard Tab Sections** highlight additional customer purchasing information categories and will be covered in more depth later in the following lessons of this training guide:<br>▪ “Users Section”<br>▪ “Orders Section”<br>▪ “Ship To Section”<br>▪ “Recommendations Section”<br>▪ “Stores Near By Section” |

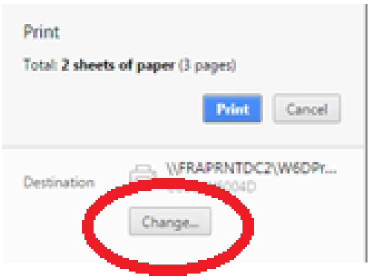
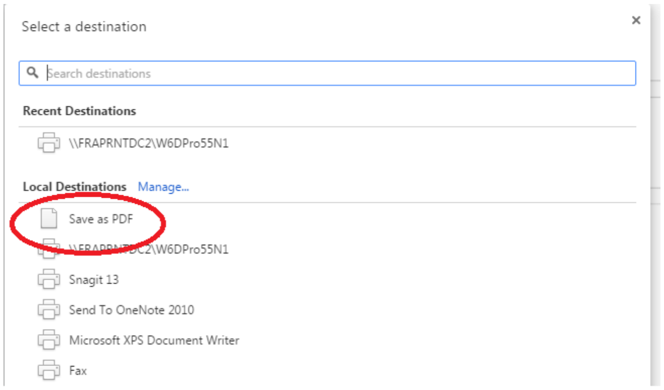
| | | |
|---|---|---|
| **3** | On SFDC | The **On SFDC** provides quick links to punch-out to Salesforce.com.<br>• Create New Opp – opens Salesforce.com login or if already logged on, opens directly to the New Opportunity Page<br>• Log A Task - opens Salesforce.com login or if already logged on, opens directly to the Task Record Type page |
| **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 | • Accounts can be quickly located by leveraging the **Search** box, which is especially useful with large customer lists<br>• The associate may search for existing customers via the **Search Box** using either a customer number or full customer name.<br>**Note**: When using this **Search Box (**only the **Dashboard** Search):<br>○ **Customer Number** – must consist of numbers only, no letters **Customer Name** – must be the exact name; the **Search Box** within the **Dashboard** does not provide automatic search suggestions<br>• 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 |

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

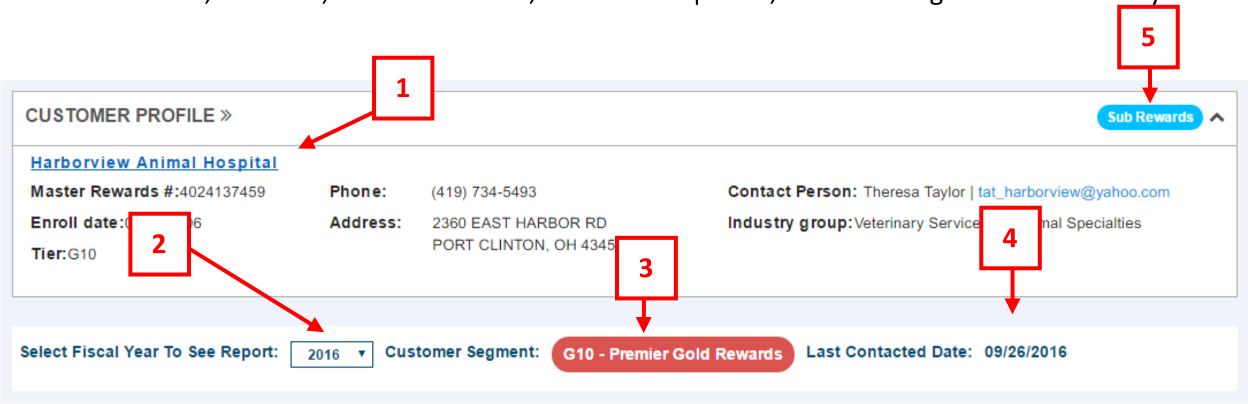
## Lesson 5 - Dashboard Sections

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

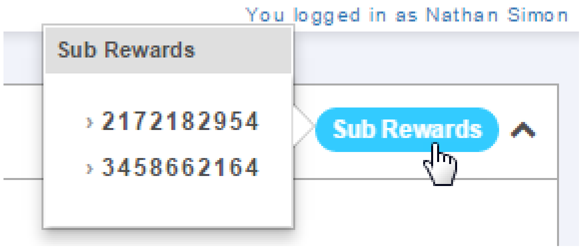
### Customer Profile

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.



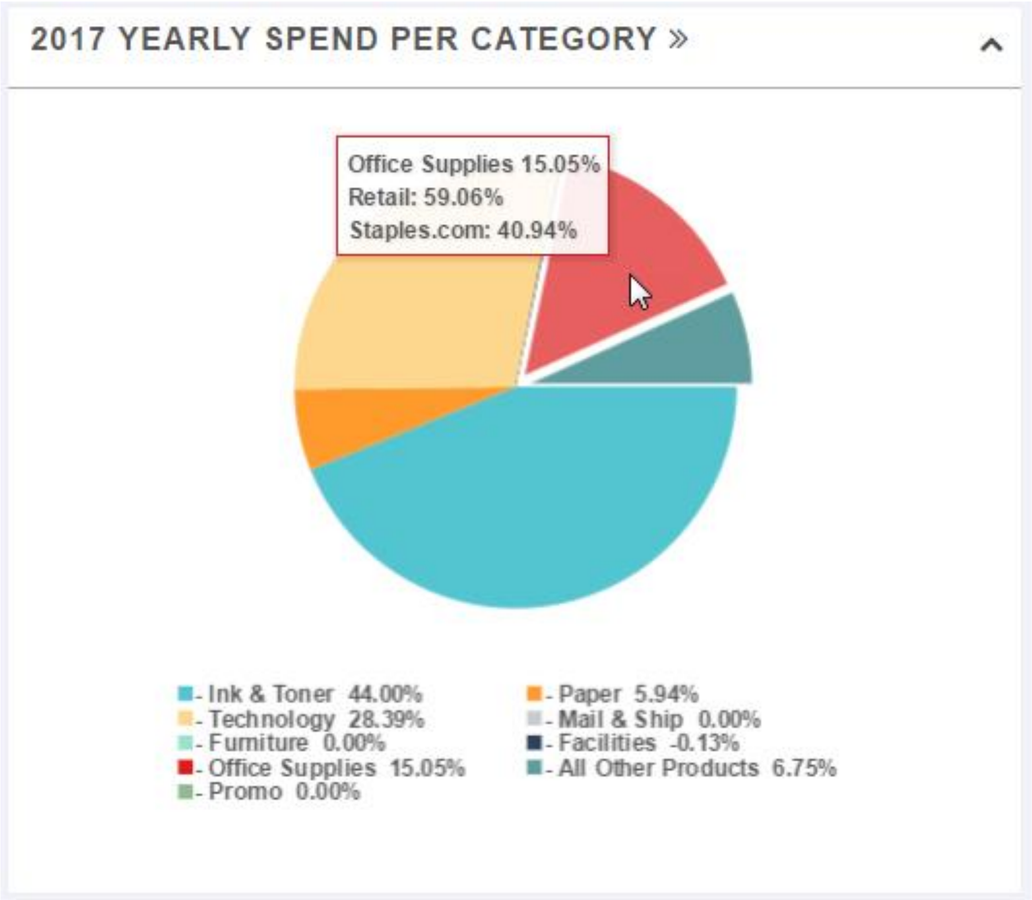

1. Clicking the hyperlink on the Company Name opens the Salesforce.com login page and the Account page. Note: *If you are already logged into Salesforce, the Account page will open directly.*
2. The dropdown in **Select Fiscal Year To See Report** allows you to change the year summarized in the **Dashboard** 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.

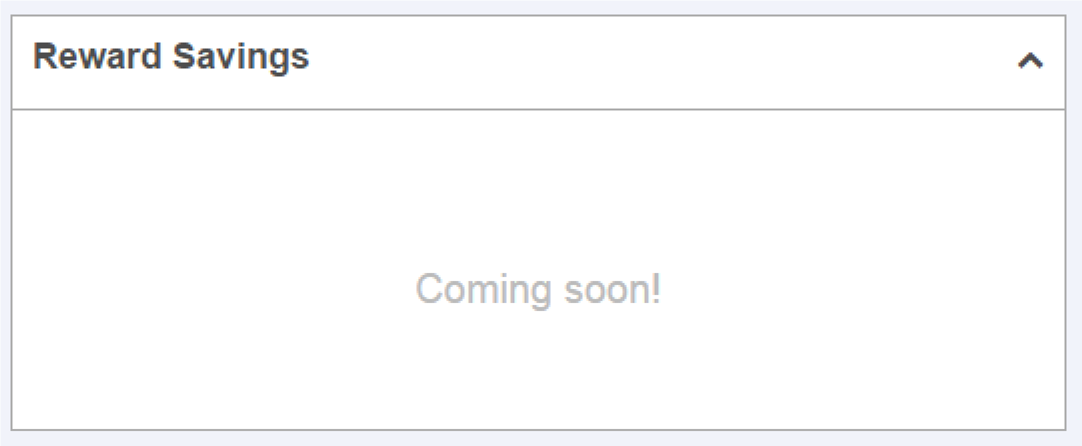



The chart provides the spend percentage per category based on the overall spend for the year in the following nine product categories:

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

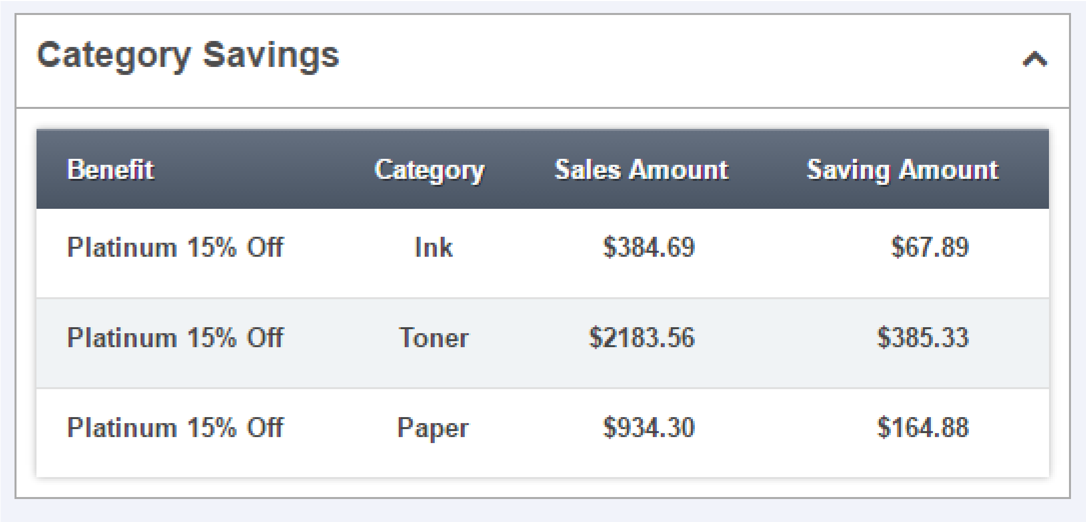
### Rewards Savings

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



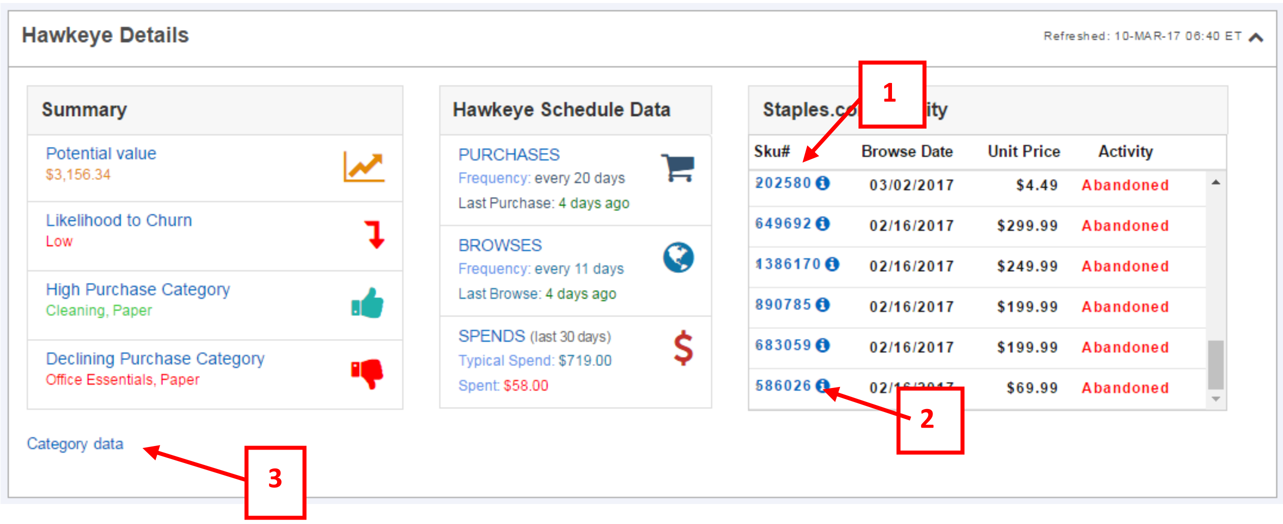

### Category Savings

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

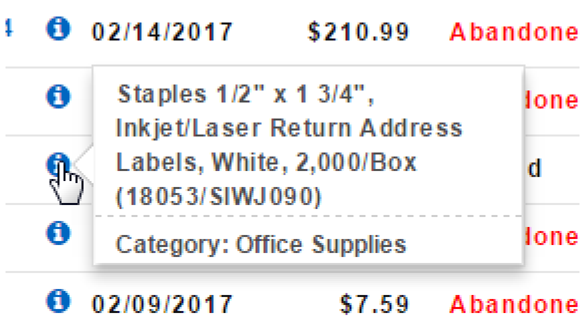

Category Savings

| 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 |

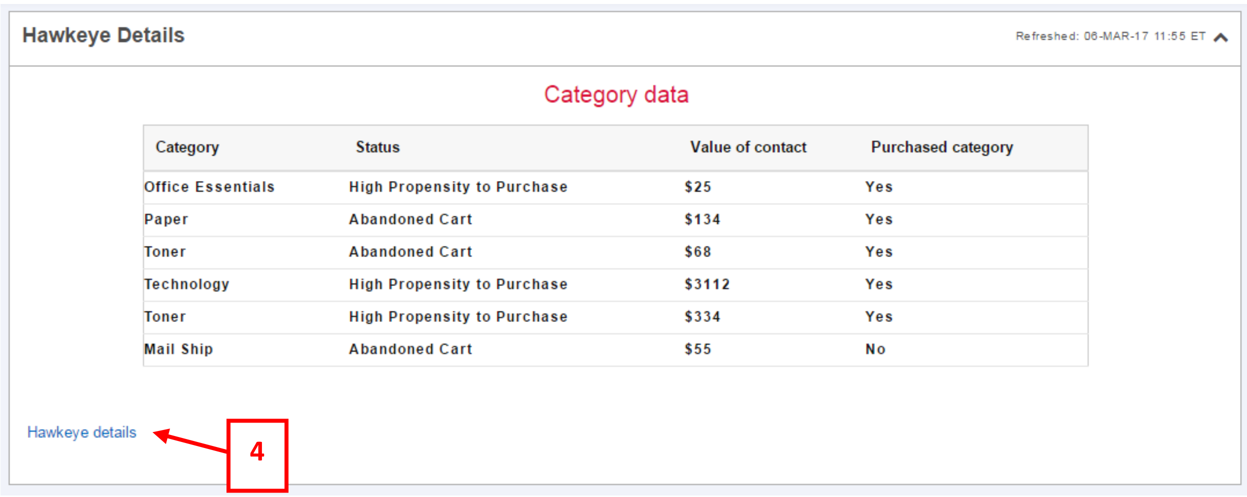
## Hawkeye Details




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




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




| 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 |



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: Search

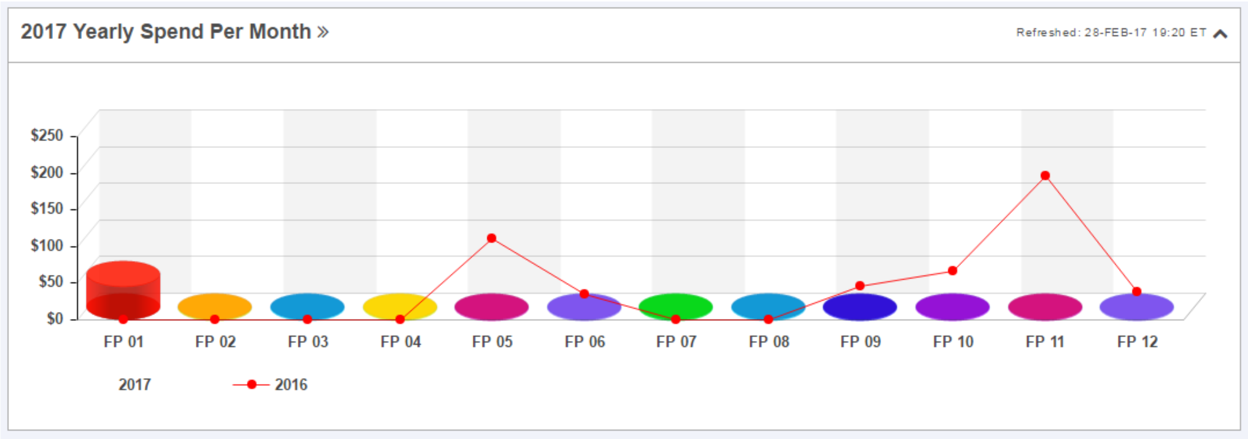
| Period From | Period To | Statement Amount | Used | Tier Id | Statement Code | Redeemed Member No. | Expiration Date |
|---|---|---|---|---|---|---|---|
| 01/01/2017 | 01/31/2017 | $10.00 | Y | PP5 | 32**********0263 | | 03/31/2017 |
| 01/01/2017 | 01/31/2017 | $5.00 | Y | PP5 | 31**********2929 |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

Showing 1 to 5 of 37 entries                                        Previous 1 2 3 4 5 … 8 Next

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

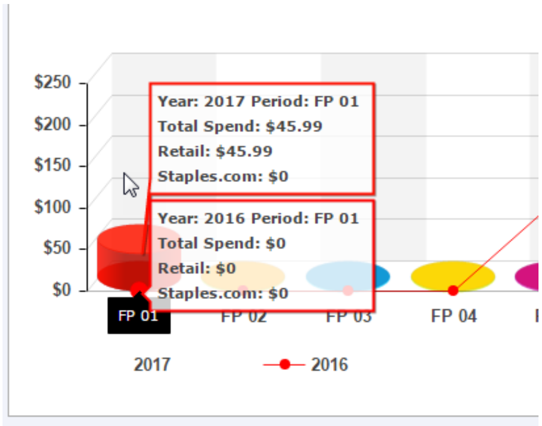
## Yearly Spend Per Month

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

See Retail and Staples.com Sales

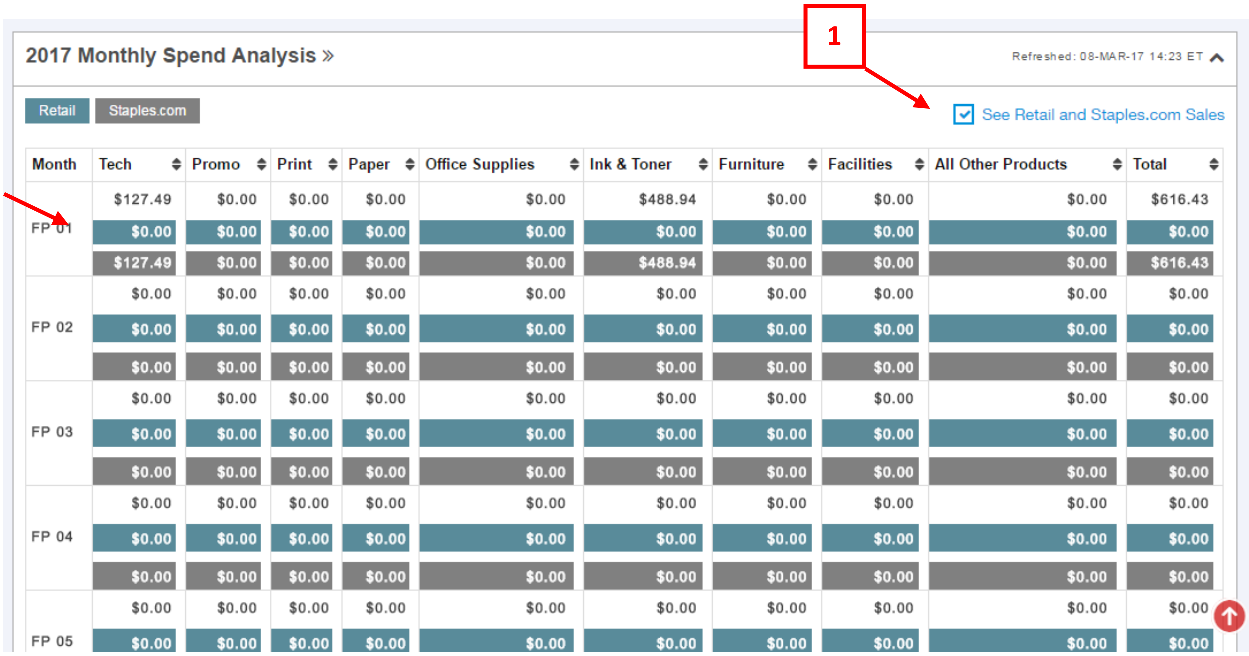
| Month | Tech | Promo | Print | Paper | Office Supplies | Ink & Toner | Furniture | Facilities | All Other Products | Total |
|---|---|---|---|---|---|---|---|---|---|---|
| FP 01 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| FP 02 | $0.00 | $0.00 | $0.00 | $0.00 | $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

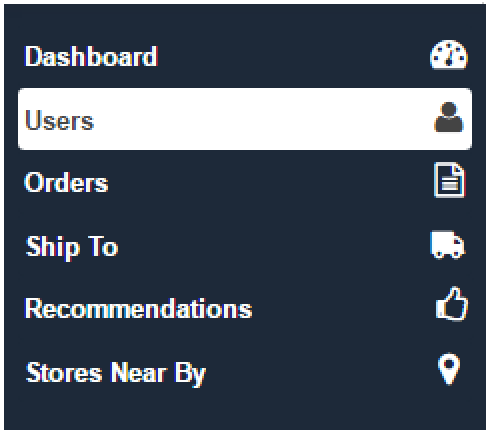
Similar to the **Yearly Spend Per Month** section, the **Monthly Spend Analysis** section displays each fiscal period thus far in the year selected, along with the purchasing spend per category, as well as total spend for that fiscal period.

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




| 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 |

## 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.

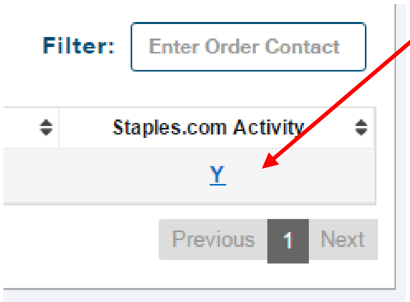
### Users Information

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

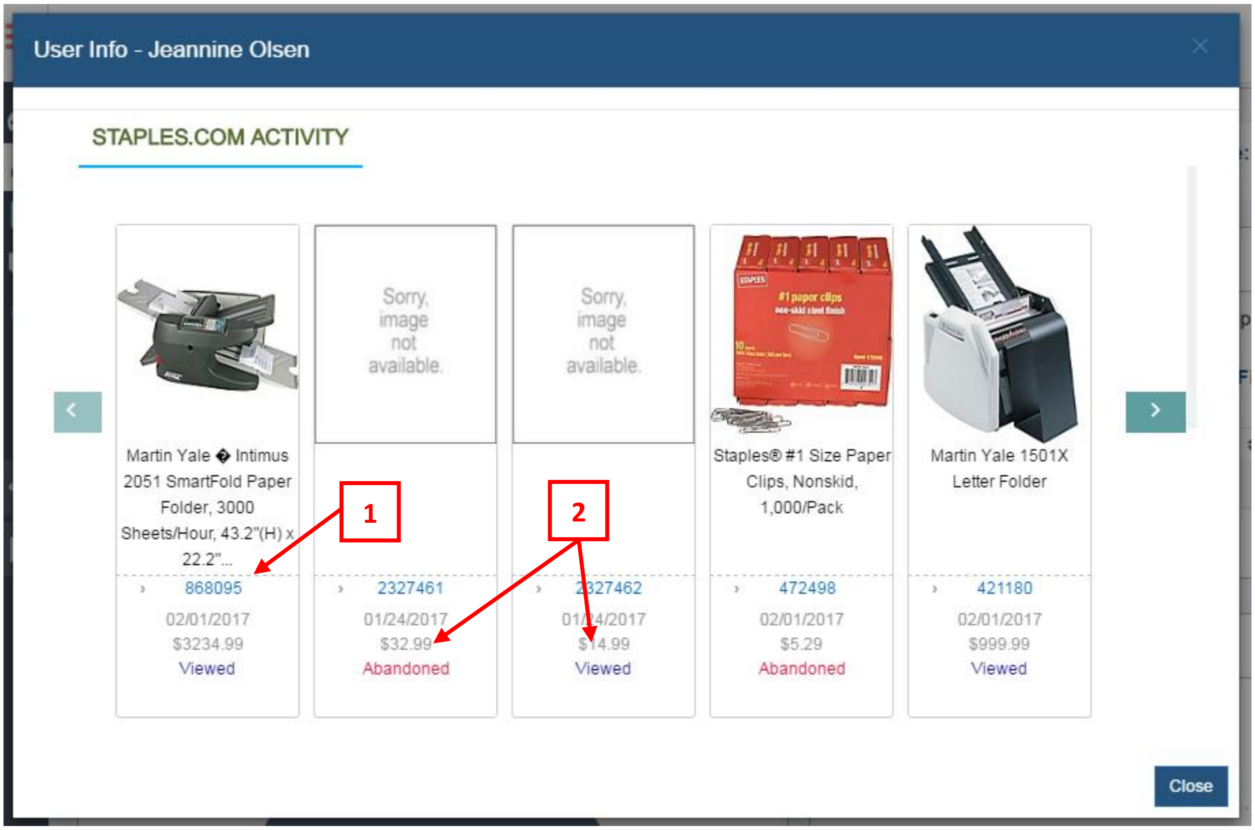

| | Category | Description |
|---|---|---|
| **1** | Contact Name | The name of the customer user or order contact. |
| **2** | Email Address | The email address for this user. Click on the address and an Outlook email opens addressed to this contact. |
| **3** | Phone | The contact's telephone number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

| | | |
|---|---|---|
| **5** | Staples.com Activity | • This column will display a Yes(Y) or No(N) showing if the user has been accessing and purchasing products on Staples.com<br>• If there has been customer activity, clicking on the **Y** hyperlink within the **Staples.com Activity** column will access the **User Info Search String** pop-up window<br>• Refer to the User Info details on the Staples.com **window** |

## User Info -Staples.com Activity

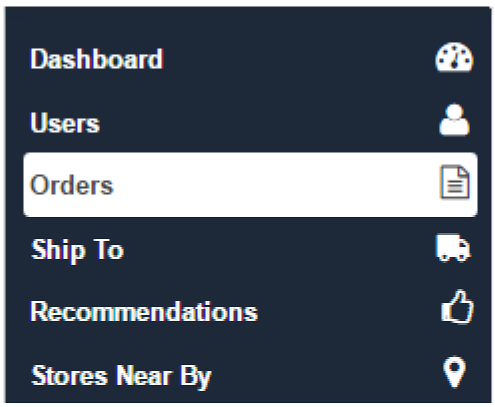



The **User Info** window will appear when a user clicks on “Y”



| | Category | Description |
|---|---|---|
| **1** | Product Details | Select the SKU to open the item’s page on Staples.com |
| **2** | Staples.com Activity | The **Staples.com Activity** window lists product SKU's that were<br>• Viewed<br>• Abandoned |

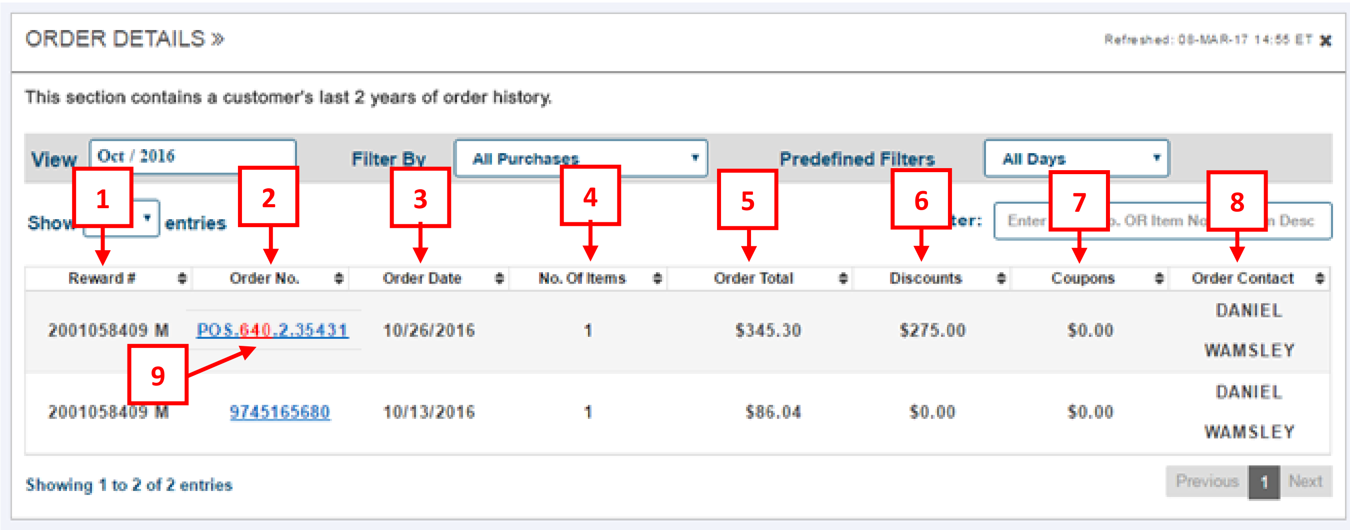
## Lesson 7 - Orders Section




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.

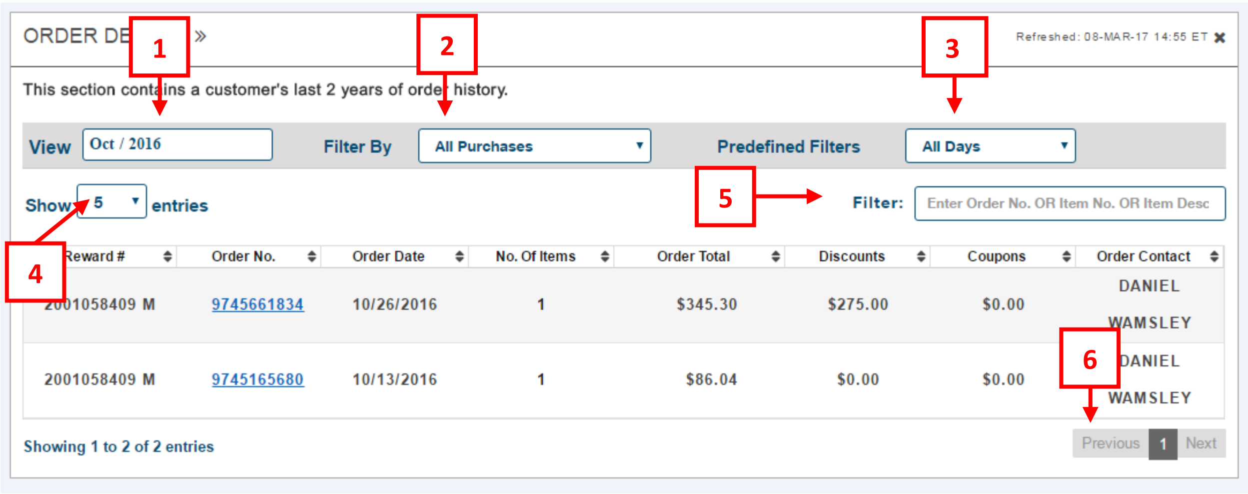



| | Category | Description |
|---|---|---|
| **1** | Rewards Number | • The Rewards # column displays the member number used in the sales transaction. The letter after the number signifies M for Master number and S for Sub-member number used. |
| **2** | Order No. | • The **Order Number** column provides the associated order number for orders/sales transactions placed on the account<br>• Clicking on the **Order No**. hyperlink will access an **Order Details** pop up window that displays information pertaining to that order inclusive of:<br>▪ Item or product Numbers<br>▪ Item Descriptions<br>▪ Quantities<br>▪ Discount Amounts<br>▪ Coupon Amounts<br>▪ Total Spend<br>▪ Status of Order – this will be blank for retail transactions<br>• The **Order Details** 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.<br><br>Note: *If there is a return associated with the order* (R) *is displayed* |
| **3** | Order Date | The **Order Date** column displays the date that the respective order was placed |
| **4** | No. of Items | The **No. of Items** column displays the number of items purchased in the specific order |

| | | |
|---|---|---|
| **5** | Order Total | The **Order Total** 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.640.2.35431 where 640 is the Staples store number. |

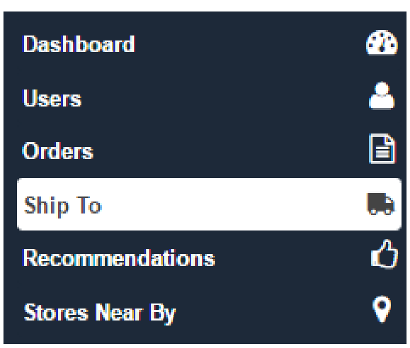
## Orders Details – Filter Options

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



| | Category | Description |
|---|---|---|
| **1** | View | The **View** drop-down menu provides the ability to refine order detail search by month, year or desired time spans. |
| **2** | Filter By | The **Filter By** drop-down menu allows associates to filter orders by product categories |
| **3** | Predefined Filters | The **Predefined Filters** drop-down menu provides the option to filter by preset time periods of 30, 60 and 90 days |
| **4** | Show Entries | The **Show Entries** 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 | The **Filter** field allows associates to refine the displayed order list by Order No. OR Item Description.<br>• *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.* |
| **6** | Navigation | The **Navigation** bar located at the bottom right of the **Order Details** screen allows associates to go to next, last, or selected page from the order list. |

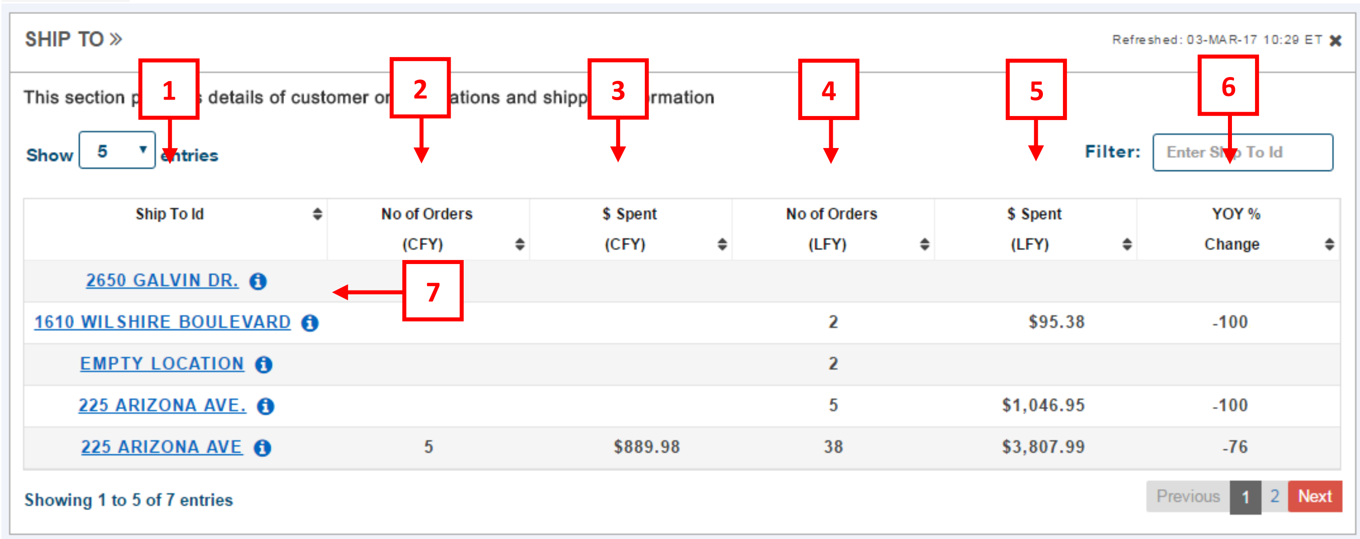
## Lesson 8 - Ship To Section



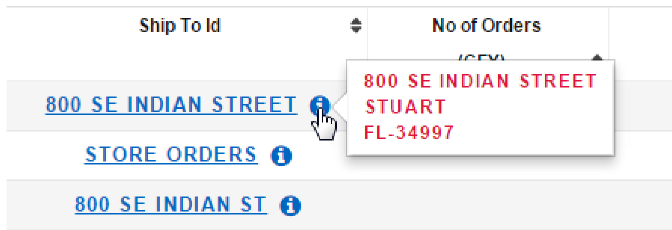

Clicking the **Ship To tab** on the left side of the Dashboard will display the **Ship To section** directly on the main **Dashboard** page.

## Ship To

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

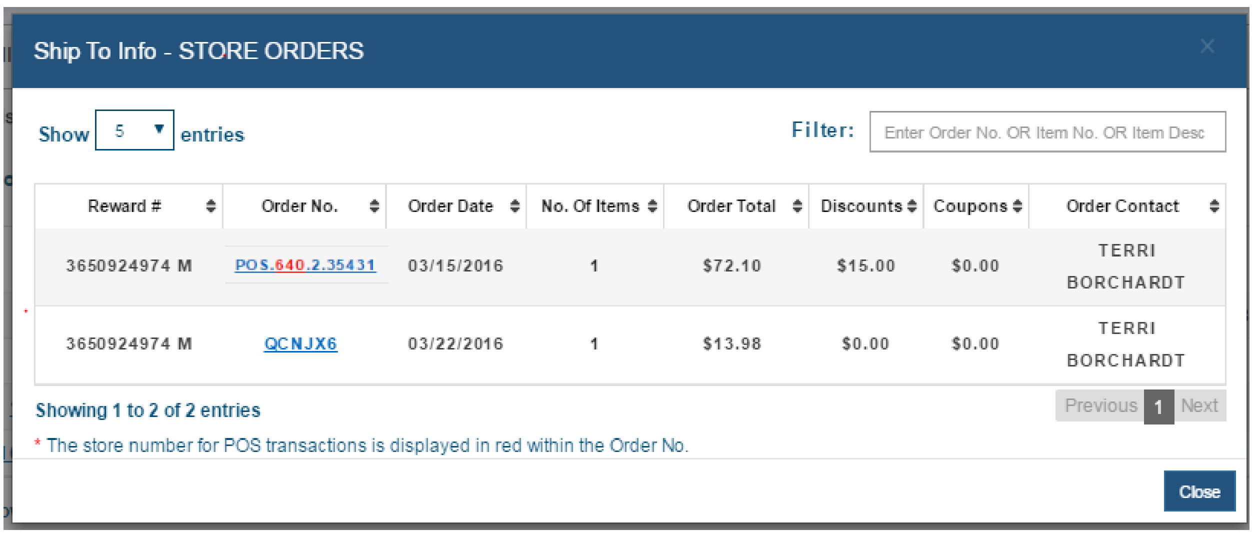



| | Category | Description |
|---|---|---|
| 1 | Ship To ID | The **Ship To ID** provides the name of the shipping contact for that order on Staples.com. Click the ID hyperlink opens the Ship To Info page containing the orders for this location. |
| 2 | No. of Orders (CFY) | **No. of Orders (CFY)** displays the **Number of Orders** placed by the respective Ship To Id within the current fiscal year |
| 3 | $ Spent (CFY) | **$ Spent (CFY)** provides the Ship To Id's total spend amount from all orders within the current fiscal year |
| 4 | No. of Orders (LFY) | **No. of Orders (LFY)** lists the number of orders placed by the respective Ship To Id within the last fiscal year |
| 5 | $ Spent (LFY) | **$ Spent (LFY)** displays the Ship To Id's spend amount from all orders thus far within the last fiscal year |
| 6 | YOY % Change | **YOY % Change** compares Last Fiscal Year sales with Current Fiscal Year sales (To Date). The values will range from -100 to +100%.. *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.* |
| 7 | Ship To ID info icon | The **Information** icon displays the shipping address for the selected ID |

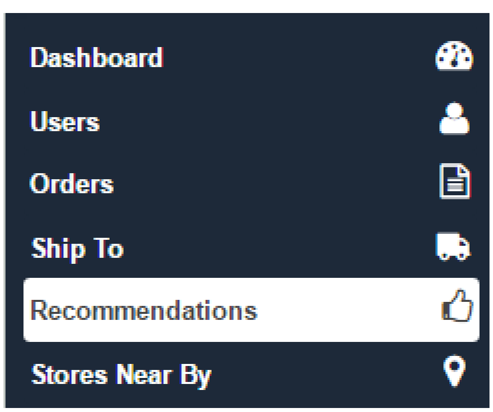



## Ship To Info

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.

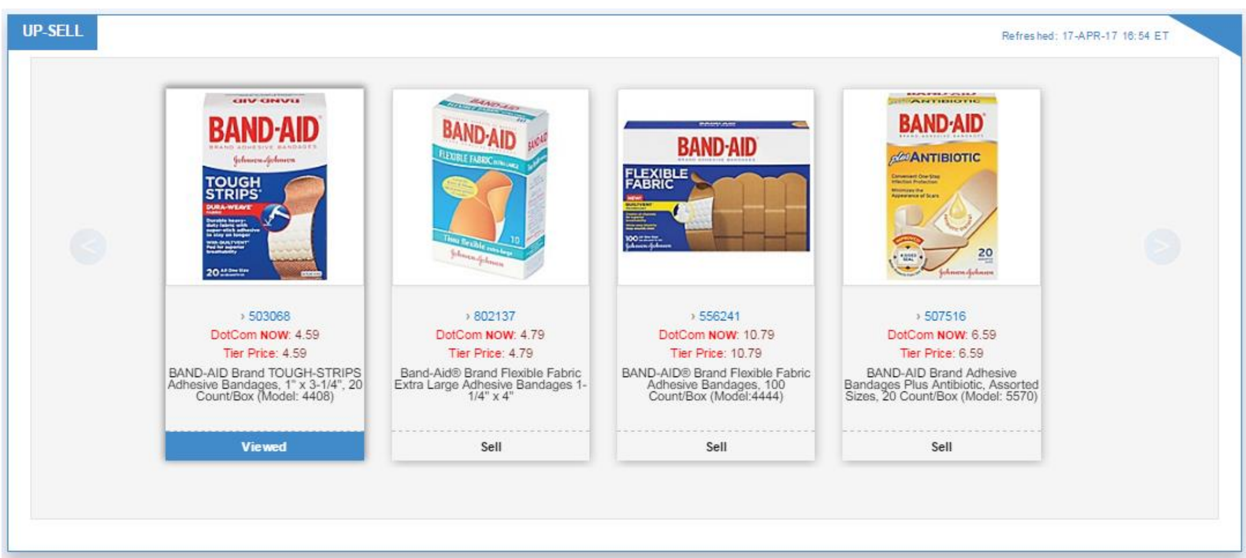
## Accessing the Recommendations Section

- 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.*

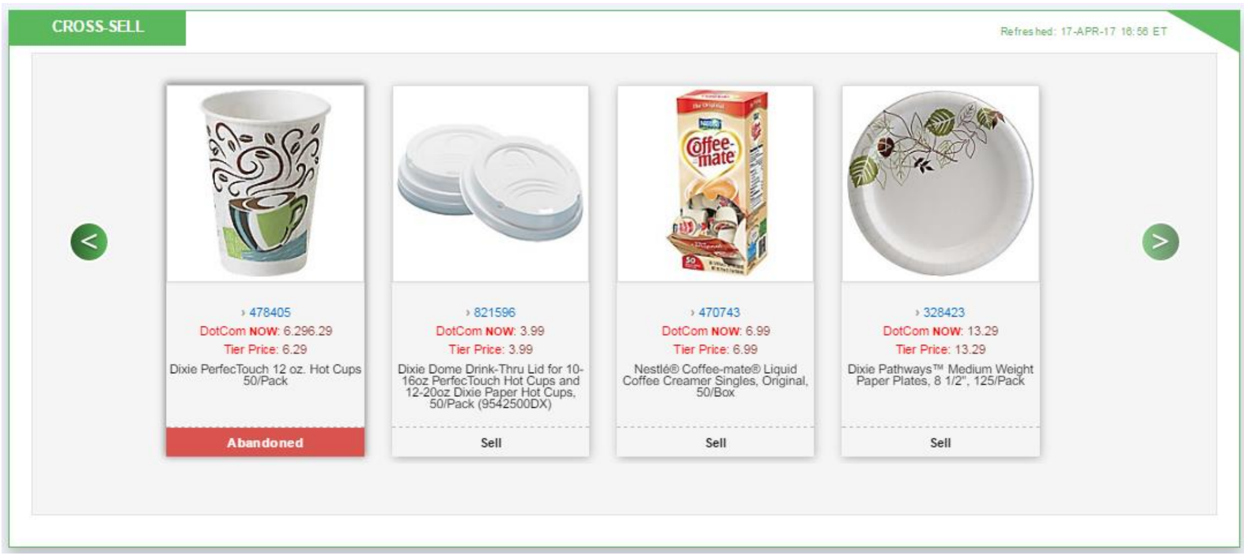
## Up-Sell

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.



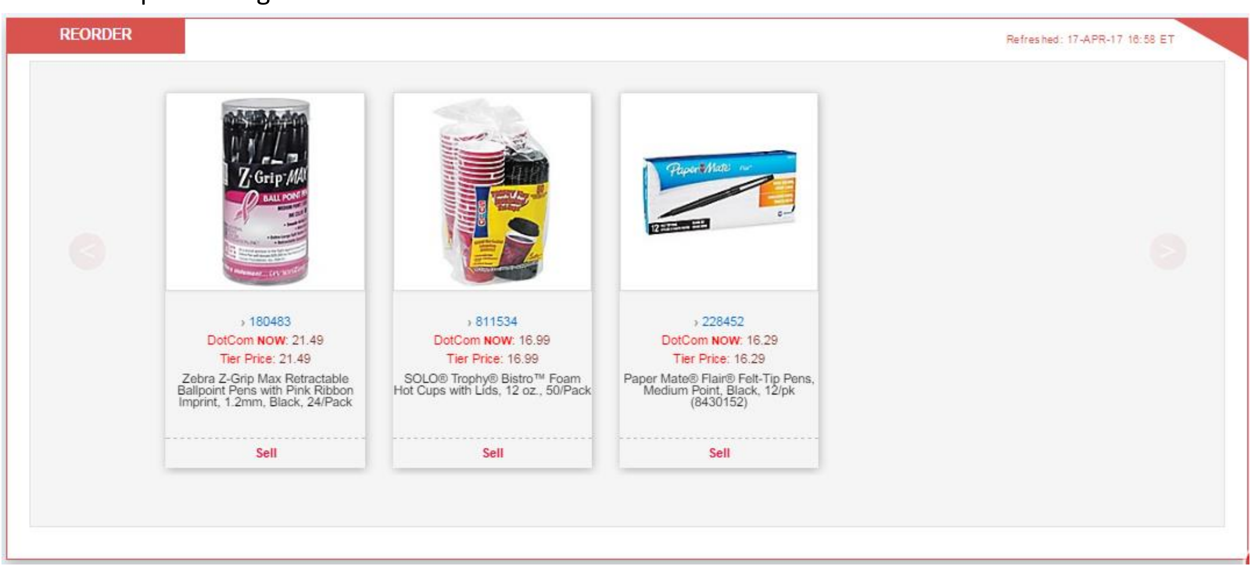
## Cross- Sell

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.



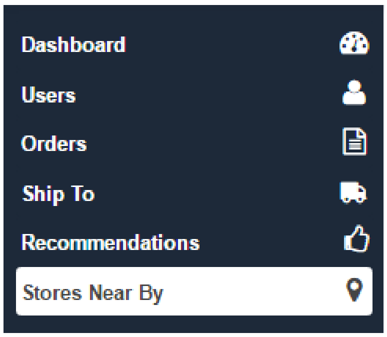

## Reorder Pane

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

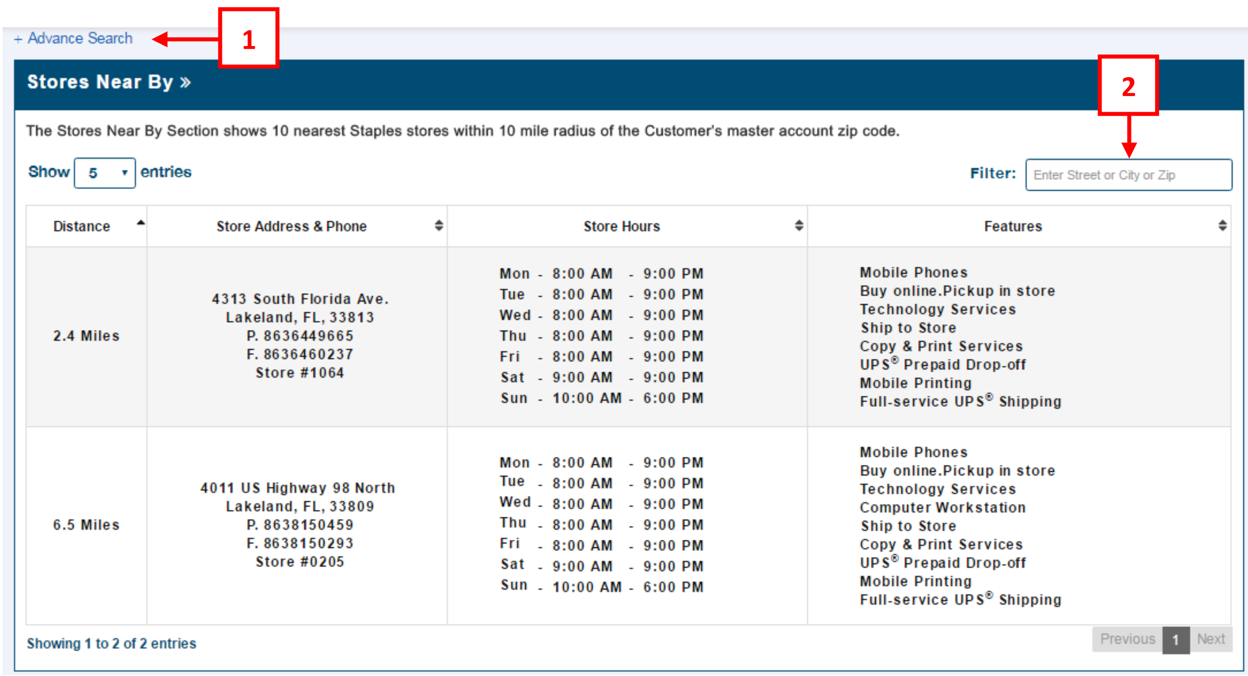



- The **Reorder Pane** displays products that customer has purchased in the past and is most likely to reorder soon
- The products are listed by the date that the customer is most likely to purchase, in descending order starting with the most recent product to be purchased

## 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** 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.