Helios Leads Training Guide

STAPLES Advantage Learning and Development

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Lesson 1 – Helios Overview

The Helios tool provides insight into customer purchasing habits and trends. Having more insight into customers' purchasing habits allows associates to tailor their conversations towards the customers' specific business needs and ultimately drive more sales!

The Helios Lead module provides the associate with key background information to support customer conversion to Staples Business Advantage.

Helios Workflow Overview

The diagram below outlines the standard Helios SBA leads workflow process, indicating the order in which the associate would commonly navigate the site. Included below are brief descriptions of each of these sections, which will be explored in greater detail through this guide.

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

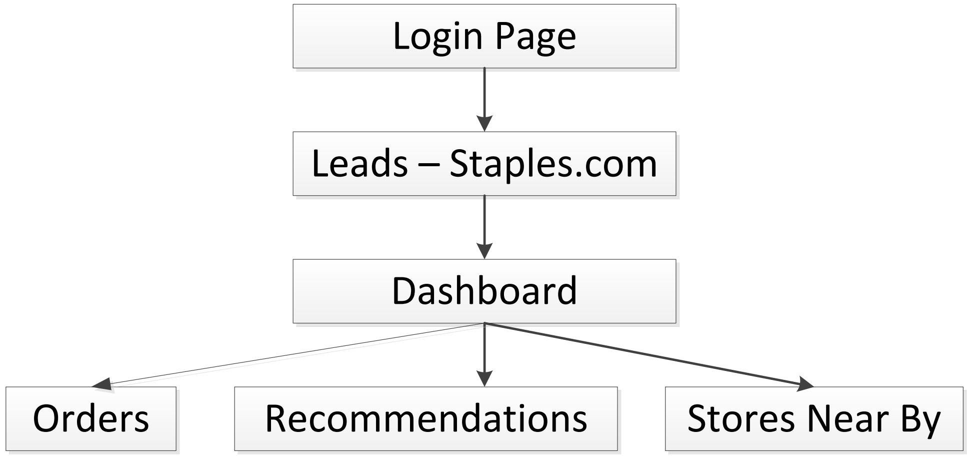
Leads – Staples.com – This page displays the associate's list of the Customers / Companies currently managed by Staples.com that are viable for SBA. Information includes the customer's associated Rewards customer number, tier, contact information, as well as other details.

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

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

Recommendations – The Recommendations Section provides a list of up to the top 15 products purchased with the Select and Premium pricing information.

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



Lesson 2 – Login Process

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

Clear Cache

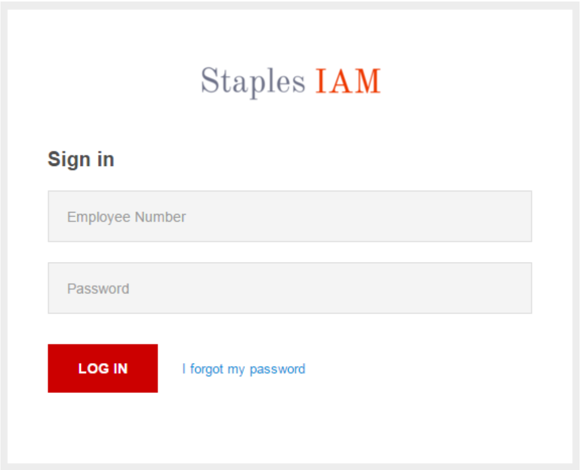
Clearing cache essentially clears browsing history/cookies and will only need to be done once prior to initially accessing the sign on screen. Complete the steps below to clear cache from your Windows Desktop or iPad system.

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

- **iPad:**
    - In the Chrome app, tap on the **Menu** button (which looks like three horizontal lines)
    - Select **Settings**
    - Tap on **Privacy**
    - The option to "Clear Cookies, Clear Cache, Clear Browsing History, or Clear All" will display
    - Select **Clear All**

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 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_sa_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.*

Installing Cisco AnyConnect *(for ACs and AMs only)*

Helios requires users to be on the Staples network; however as long as ACs install the **Cisco AnyConnect app** on their iPads, they'll be able to access it anytime and anywhere as long as WIFI is available and the user is connected to VPN.

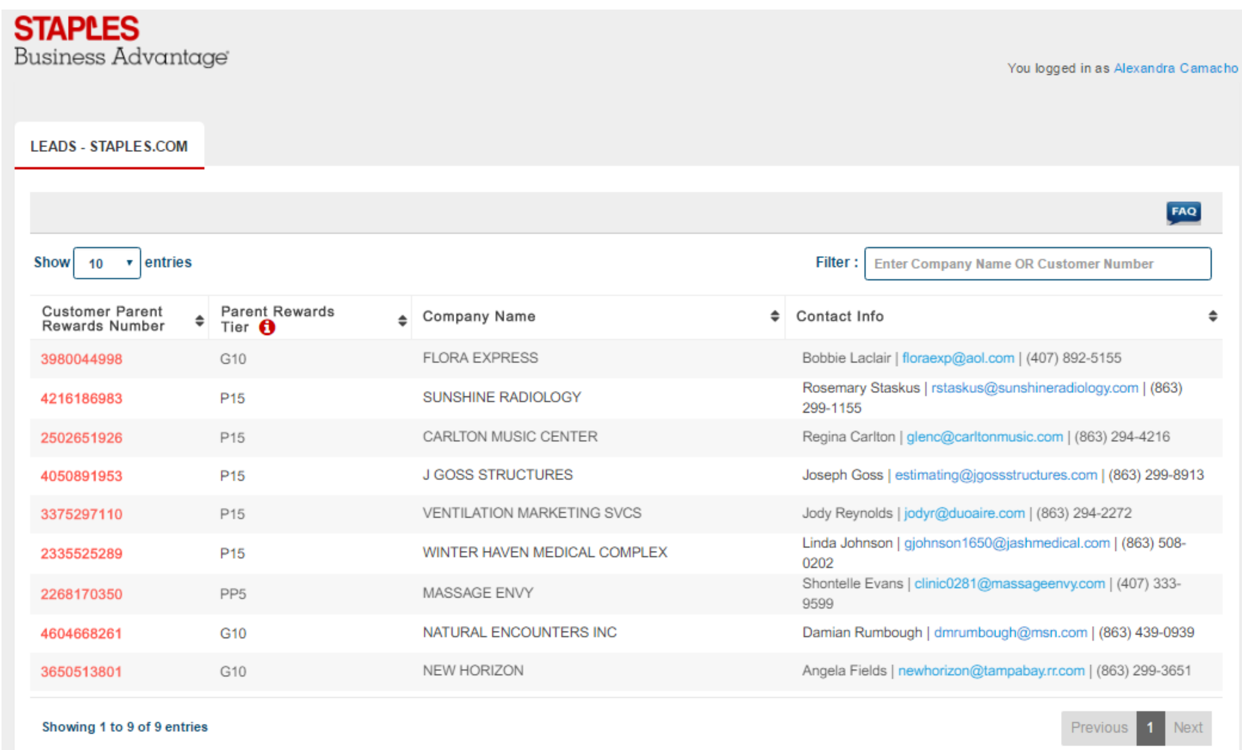
For steps on how to install the Cisco AnyConnect app, click on this guide **Cisco AnyConnect Guide**

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 Chrome.

Lesson 3 – Leads - Staples.com

Leads – Staples.com displays a list of the Staples.com customers that have been selected and qualify for Staples Business Advantage.

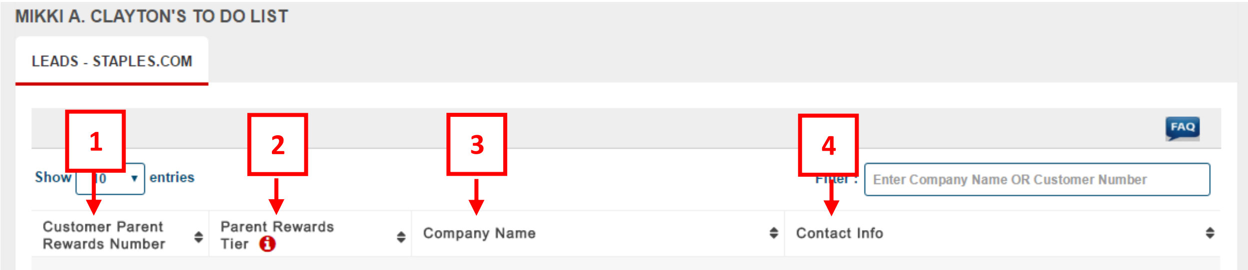

STAPLES
Business Advantage
You logged in as Alexandra Camacho
LEADS - STAPLES.COM
FAQ
Show 10 entries
Filter : Enter Company Name OR Customer Number

Customer Parent Rewards Number	Parent Rewards Tier	Company Name	Contact Info
3980044998	G10	FLORA EXPRESS	Bobbie Laclair | floraexp@aol.com | (407) 892-5155
4216186983	P15	SUNSHINE RADIOLOGY	Rosemary Staskus | rstaskus@sunshineradiology.com | (863) 299-1155
2502651926	P15	CARLTON MUSIC CENTER	Regina Carlton | glenc@carltonmusic.com | (863) 294-4216
4050891953	P15	J GOSS STRUCTURES	Joseph Goss | estimating@jgossstructures.com | (863) 299-8913
3375297110	P15	VENTILATION MARKETING SVCS	Jody Reynolds | jodyr@duoaire.com | (863) 294-2272
2335525289	P15	WINTER HAVEN MEDICAL COMPLEX	Linda Johnson | gjohnson1650@jashmedical.com | (863) 508-0202
2268170350	PP5	MASSAGE ENVY	Shontelle Evans | clinic0281@massageenvy.com | (407) 333-9599
4604668261	G10	NATURAL ENCOUNTERS INC	Damian Rumbough | dmrumbough@msn.com | (863) 439-0939
3650513801	G10	NEW HORIZON	Angela Fields | newhorizon@tampabay.rr.com | (863) 299-3651

Showing 1 to 9 of 9 entries
Previous 1 Next

Customer Information

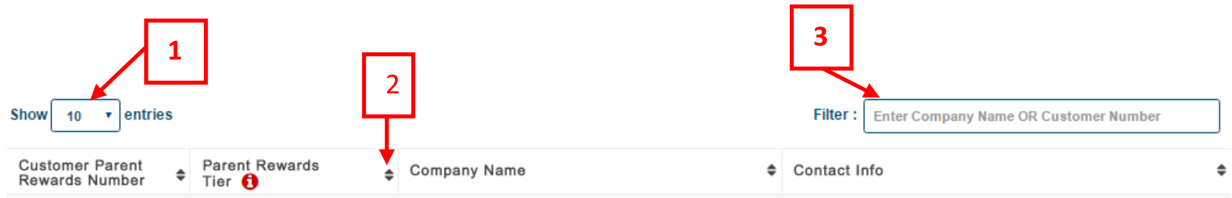
The **To Do List** provides important high level information about the account in call order priority.



#	Category	Description
1	Customer Parent Rewards Number	This is the Rewards member number assigned to the **Parent**. The customer may have other Rewards member numbers, child member numbers, which roll up to the **Parent**. Note: Click on to sort each column in either ascending or descending order.
2	Parent Rewards Tier	The Rewards program in which the customer is currently enrolled. Select the information button to view and/or print the different SAM Rewards benefit details.
3	Company Name	The business name for this customer.
4	Contact Info	The person's name, email address and phone number of the contact representing this account. Click on the email address to open a pre-addressed Outlook email.

Filter, Search Features & Sort

Various filter and search features are available on the **Leads – Staples.com** which provide the ability to narrow down the displayed accounts.

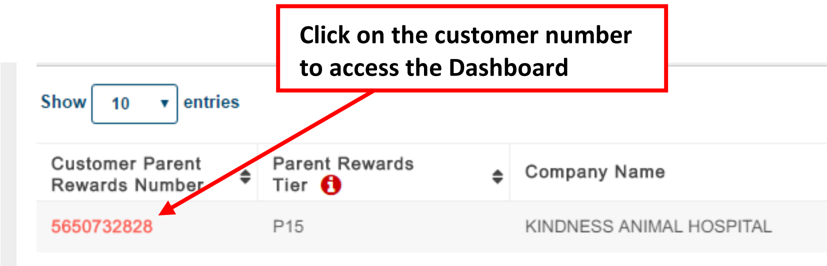


#	Category	Description
1	Show Entries	• The **Show Entries** drop-down, by default, shows 10 leads per page with the option to browse additional pages • The numbers of entries may be adjusted to 10, 25, 50, 100 or All entries per page by using the **Show Entries** drop-down
2	Sort	Click the sort icon 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.
3	Search	• Accounts can be quickly located by leveraging the **Filter** within the Leads – Staples.com list. This can be especially useful with large customer lists because you can easily retrieve the one customer you need. • The associate may search by company name or customer number • This **Search** box is a smart search feature that provides search results based on even partial entries *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* • 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

Lesson 4 - Customer Dashboard

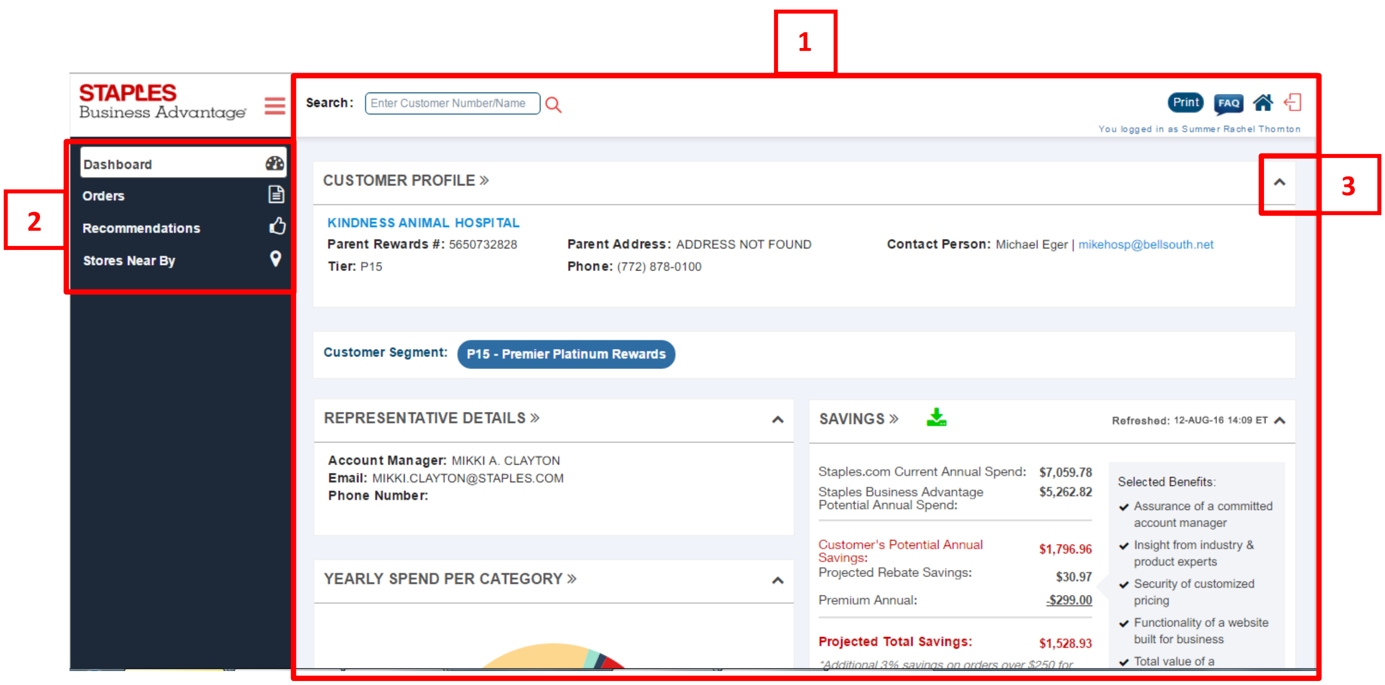
Accessing the Dashboard

Once you've reviewed the **Leads – Staples.com list** and determined which customer account to view, access the **Customer Dashboard** by clicking on the applicable **Customer Parent Rewards Number** on the left side of the **Leads – Staples.com list**, as shown below:



Dashboard Components

The **Customer Dashboard** provides an overview of the SBA lead and their spending history.

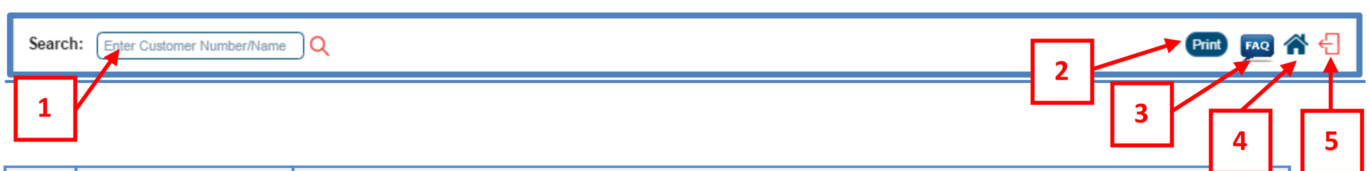


#	Category	Description
1	Dashboard Sections	The **Dashboard** contains the following sections on the main area which provide a 360 degree view of the account and purchasing history for the last 3 years: • Customer Profile • Representative Details • Savings • Yearly Spend Per Category

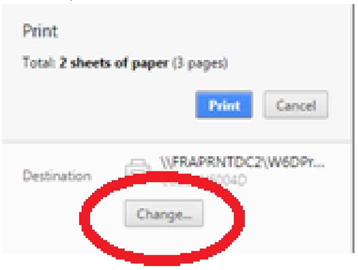
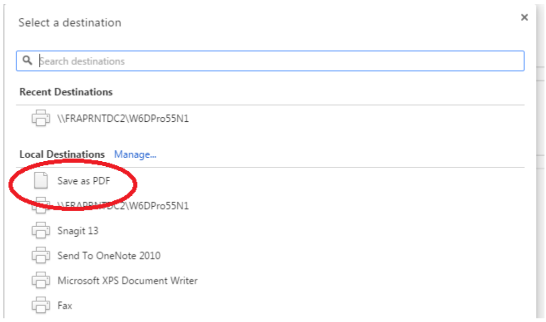
		• Category Penetration • Yearly Spend Per Month • Monthly Spend Analysis
2	Dashboard Tab Sections	• The Dashboard has **Dashboard Tab Sections** that open up additional sections of the Dashboard screen. • These **Dashboard Tab Sections** highlight additional customer purchasing information categories and will be covered in more depth later in the following lessons of this training guide: ▪ <u>"Orders Section"</u> ▪ <u>"Recommendations Section"</u> ▪ <u>"Stores Near By Section"</u>
3	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 **Leads – Staples.com** list.



#	Category	Description
1	Search Box	• Accounts can be quickly located by leveraging the **Search** box, which is especially useful with large customer lists • The associate may search for existing customers via the **Search Box** using either a customer number or full customer name. Note: When using this **Search Box (**only the **Dashboard** Search): ○ **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 • 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 Save as PDF	The Print button allows the associate to print the information displayed on the account Dashboard

		To save the Dashboard view as a PDF file, select **Print** and then click the **Change**  button on the print preview page. **Save as PDF** is listed under the **Location Destinations**. 
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 **Leads** list from the **Dashboard;** click the **Back to To Do List/Home** 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 Door,** displays a snapshot of the **Leads** list in call priority order; this is another way to switch to a different account.

Lesson 5 - Dashboard Sections

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

- Customer Profile
- Representative Details
- Savings
- Yearly Spend Per Category
- Category Penetration
- Yearly Spend Per Month
- Monthly Spend Analysis

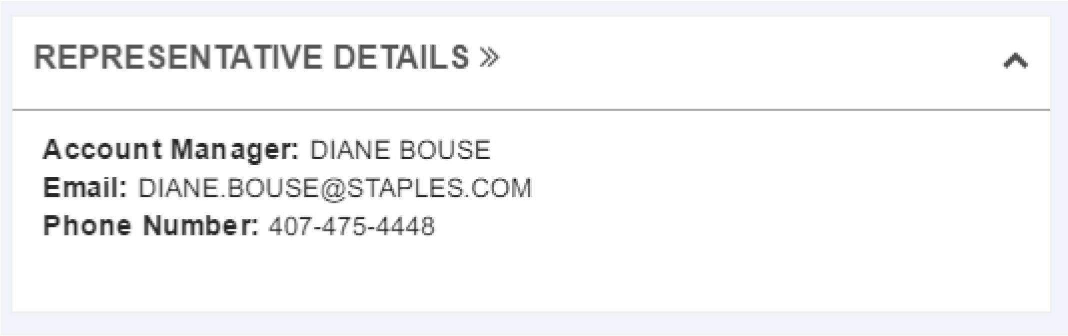
Customer Profile

The Customer Profile section provides pertinent details about the customer including company name, the parent Rewards customer number and tier, main address, contact name, the email and phone.

1. Clicking the hyperlink on the Company Name opens the Salesforce.com login page and the Account page.
2. If there is an email address, clicking the hyperlink on the contact's email address will open a blank, pre-addressed, Outlook email message to this Contact.
3. Clicking the Customer Segment tier will display the Rewards Description for the customer's Rewards tier.

Representative Details

The Representative Details section displays the name of the sales associate, their email and contact phone number.



Savings

The **Savings** section provides an annual summary of the customer's current spend and the potential savings if they had been a Premium customer.

Note: The dollars listed here include only products purchased by the customer that are available on StaplesAdvantage.com.

1. Click the download icon to generate an Excel report with the details used to calculate the customer's savings. Details include:
   a. Parent Customer Number – main Staples Rewards member number
   b. SKU Number – product the customer purchased
   c. Product Description
   d. Channel – where the customer purchased the product; D= Staples.com, R = retail store
   e. Amount Spent – how much the customer actually paid for the product
   f. Program Price – what the customer would have paid if an SBA customer
   g. Projected Rebate – displays the appropriate amount if the product qualifies for a rebate
   h. Program Savings – value the customer would have saved if an SBA customer

2. Select Show benefits comparison to display a breakdown of the shopping benefits between Staples and Staples Business Advantage:

	STAPLES	STAPLES BUSINESS ADVANTAGE
Dependability of fast, free delivery	✓	✓
Convenience of a single monthly invoice	✓	✓
Flexibility of buying online, in-store or on your phone	✓	✓
Efficiency of one single source for all your products	✓	✓
Assurance of a committed account manager		✓
Insight from industry & product experts		✓
Security of customized pricing		✓
Functionality of a website built for business		✓
Savings of up to 20% off		✓
Total value of a personalized business supply program		✓

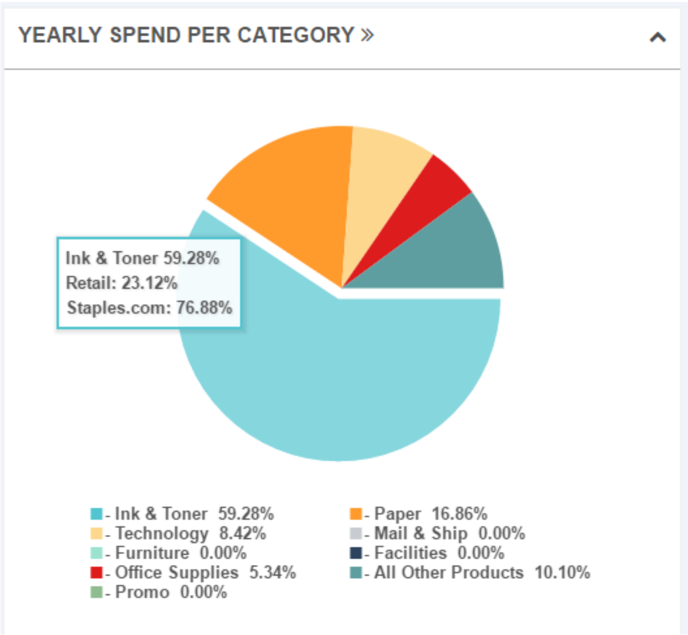
Yearly Spend Per Category

The **Yearly Spend Per Category** section provides spend analysis for the selected year for 9 product groupings:

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

Clicking on a specific "piece of the pie" highlights the specific category with the retail/Staples.com breakdown. The display shows the category percentage for the year and the retail and Staples.com percentage within that category.

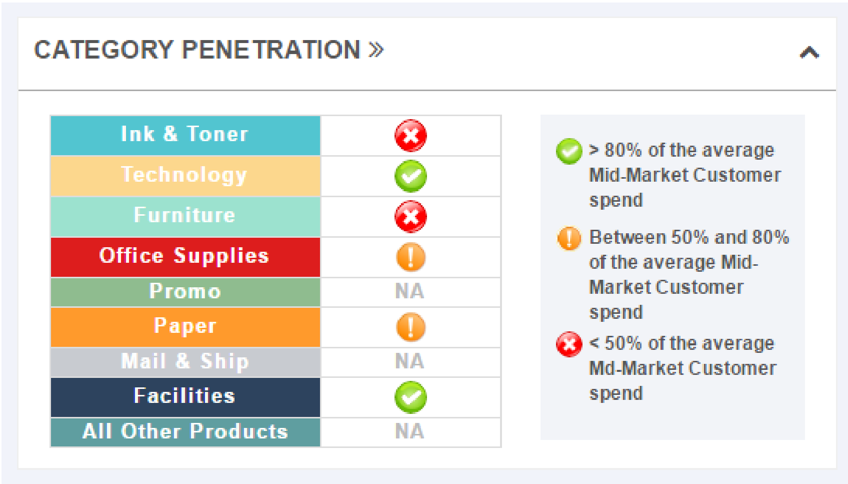
For example, this customer's purchases are 47.99% in Ink & Toner with 59.32% of Ink & Toner purchases via Retail and 40.68% via Staples.com.



Category Penetration

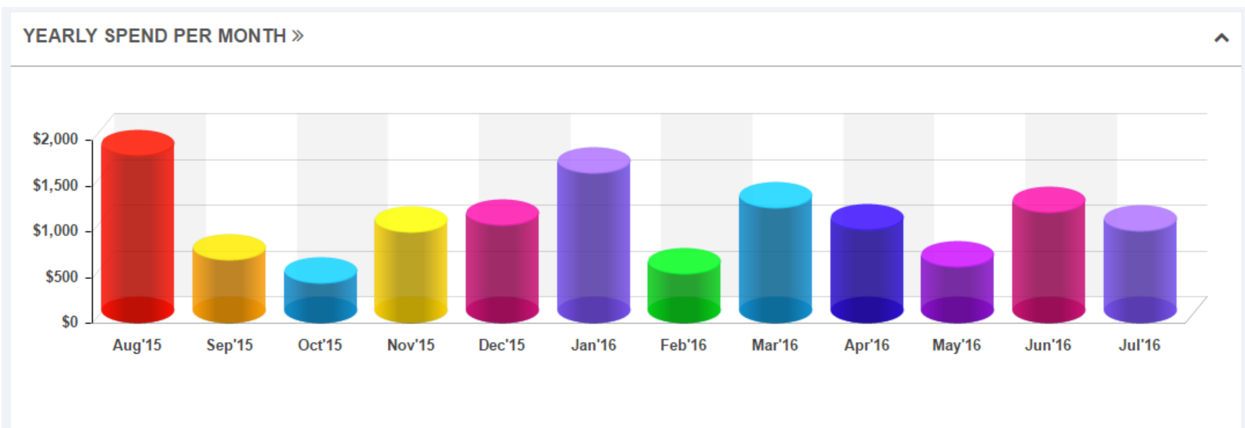
The **Category Penetration** section outlines how the customer's category buying pattern compares against the average Mid-market customer.

Note: *NA is shown when the customer has not made a purchase in the last 12 periods in this category within the mid-market product assortment.*



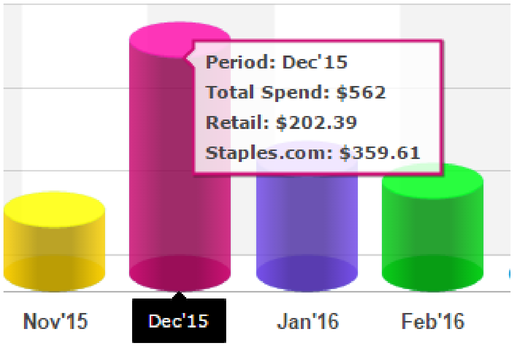
Yearly Spend Per Month

The **Yearly Spend Per Month** section provides month-over-month spending trend analysis based on each fiscal period (FP) for the previous 12 periods.



Note: *Month names are used rather than fiscal period to make it more user-friendly if the chart is shared with the customer.*

- Hovering the cursor over each cylinder will display the details, Total, Retail, Staples.com, for that fiscal period:



Monthly Spend Analysis

The **Monthly Spend Analysis** provides product category level spending analysis for each fiscal period.

Note: *Month names are used rather than the fiscal period to make it more user-friendly if the chart is shared with the customer.*

MONTHLY SPEND ANALYSIS »

See Retail and Staples.com Sales

Month	Ink & Toner	Paper	Tech	Mail & Ship	Furniture	Facilities	Office Supplies	All Other Products	Print/Promo	Total
Aug'15	$63.99	$262.87	$28.79	$0.00	$0.00	$0.00	$71.48	$28.99	$0.00	$456.12
Sep'15	$55.48	$93.61	$0.00	$0.00	$0.00	$0.00	$13.86	$0.00	$0.00	$162.95
Oct'15	$108.78	$383.33	$13.52	$0.00	$0.00	$0.00	$70.97	$355.48	$0.00	$932.08
Nov'15	$0.00	$172.94	$0.00	$0.00	$0.00	$0.00	$258.54	$0.00	$0.00	$431.48
Dec'15	$42.44	$87.96	$0.00	$0.00	$0.00	$0.00	$9.69	$31.72	$0.00	$171.81
Jan'16	$141.08	$47.28	$0.00	$0.00	$0.00	$0.00	$198.18	$52.08	$0.00	$438.62
Feb'16	$171.57	$78.10	$145.93	$0.00	$0.00	$3.99	$44.17	$91.47	$0.00	$535.23
Mar'16	$0.00	$166.63	$0.00	$0.00	$0.00	$0.00	$105.23	$118.93	$0.00	$390.79
Apr'16	$0.00	$283.89	$19.98	$0.00	$0.00	$0.00	$161.14	$67.45	$0.00	$532.46
May'16	$126.07	$119.96	$57.58	$0.00	$0.00	$0.00	$234.74	$16.29	$0.00	$554.64
Jun'16	$340.58	$361.34	$0.00	$0.00	$0.00	$0.00	$363.72	$45.15	$0.00	$1,110.79
Jul'16	$246.65	$167.74	$0.00	$0.00	$0.00	$0.00	$100.16	$15.97	$0.00	$530.52
Total	$1,296.64	$2,225.65	$265.80	$0.00	$0.00	$3.99	$1,631.88	$823.53	$0.00	$6,247.49

- Sales are summarized into nine product categories:
  - Ink & Toner
  - Paper
  - Technology
  - Mail & Shipping
  - Furniture
  - Facilities
  - Office Supplies
  - All Other Products
  - Print & Promo

- Similar to the **Yearly Spend Per Month** section, the **Monthly Spend Analysis** section displays each fiscal period for the last 12 month, 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

MONTHLY SPEND ANALYSIS »

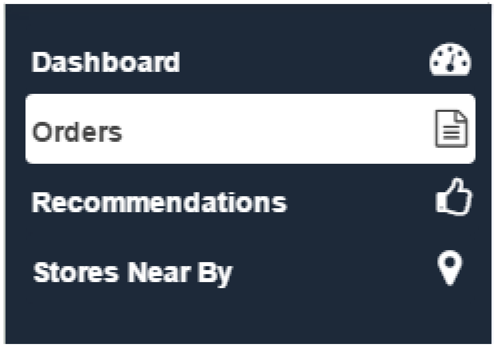
1

Retail Staples.com

See Retail and Staples.com Sales

Month	Ink & Toner	Paper	Tech	Mail & Ship	Furniture	Facilities	Office Supplies	All Other Products	Print/Promo	Total
Aug'15	$0.00	$76.12	$13.86	$0.00	$33.46	$0.00	$56.41	$111.70	$0.00	$291.55
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$0.00	$76.12	$13.86	$0.00	$33.46	$0.00	$56.41	$111.70	$0.00	$291.55
Sep'15	$130.81	$85.11	$69.54	$0.00	$0.00	$0.00	$202.04	$436.32	$0.00	$923.82
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$130.81	$85.11	$69.54	$0.00	$0.00	$0.00	$202.04	$436.32	$0.00	$923.82
Oct'15	$0.00	$68.46	$32.09	$0.00	$0.00	$0.00	$90.77	$71.54	$0.00	$262.86
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$0.00	$68.46	$32.09	$0.00	$0.00	$0.00	$90.77	$71.54	$0.00	$262.86
Nov'15	$47.23	$0.00	$32.09	$0.00	$0.00	$0.00	$62.38	$8.12	$0.00	$149.82
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$47.23	$0.00	$32.09	$0.00	$0.00	$0.00	$62.38	$8.12	$0.00	$149.82
Dec'15	$130.81	$41.78	$27.06	$0.00	$0.00	$0.00	$100.84	$10.05	$0.00	$310.54
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$130.81	$41.78	$27.06	$0.00	$0.00	$0.00	$100.84	$10.05	$0.00	$310.54
Jan'16	$108.09	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$32.09	$0.00	$140.18
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$108.09	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$32.09	$0.00	$140.18
Feb'16	$0.00	$116.70	$79.72	$0.00	$0.00	$0.00	$131.46	$23.88	$0.00	$351.76
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$0.00	$116.70	$79.72	$0.00	$0.00	$0.00	$131.46	$23.88	$0.00	$351.76
Mar'16	$223.22	$72.32	$106.02	$0.00	$0.00	$0.00	$525.45	$32.81	$0.00	$959.82
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$223.22	$72.32	$106.02	$0.00	$0.00	$0.00	$525.45	$32.81	$0.00	$959.82
Apr'16	$83.57	$163.79	$0.00	$0.00	$0.00	$0.00	$5.87	$40.11	$0.00	$293.34
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$83.57	$163.79	$0.00	$0.00	$0.00	$0.00	$5.87	$40.11	$0.00	$293.34
May'16	$482.94	$189.51	$28.12	$0.00	$0.00	$166.81	$222.64	$0.00	$0.00	$1,090.02
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$482.94	$189.51	$28.12	$0.00	$0.00	$166.81	$222.64	$0.00	$0.00	$1,090.02
Jun'16	$0.00	$0.00	$35.83	$0.00	$0.00	$0.00	$0.00	$9.62	$0.00	$45.45
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$0.00	$0.00	$35.83	$0.00	$0.00	$0.00	$0.00	$9.62	$0.00	$45.45
Jul'16	$0.00	$0.00	$19.44	$0.00	$0.00	$0.00	$20.28	$0.00	$0.00	$39.72
	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
	$0.00	$0.00	$19.44	$0.00	$0.00	$0.00	$20.28	$0.00	$0.00	$39.72
Total	$1,206.67	$813.79	$443.77	$0.00	$33.46	$166.81	$1,418.14	$776.24	$0.00	$4,858.88

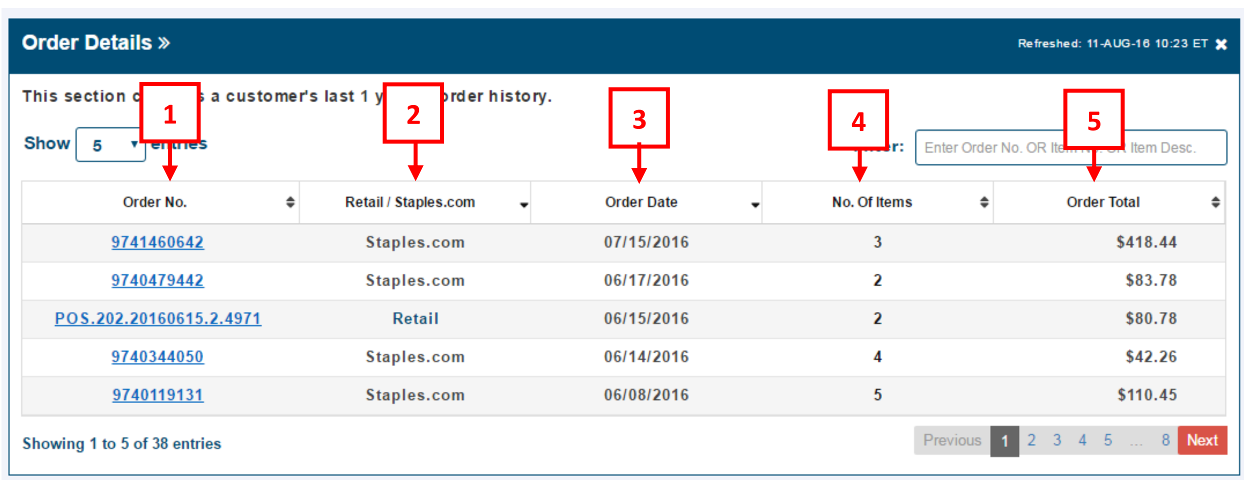
Lesson 6 - Orders Section



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 the order number, the sales channel, date of purchase, quantity of items, and amount.



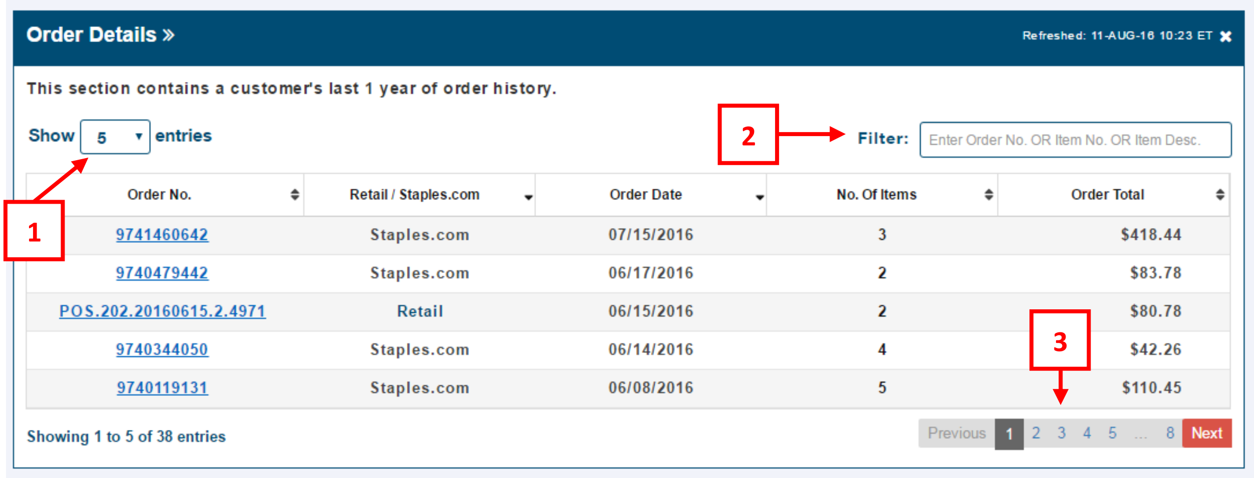
	Category	Description

1	Order No.	• The **Order Number** column provides the associated order number for orders placed on the account
		• Clicking on the **Order No**. hyperlink will access an **Order Details** pop up window that displays information pertaining to that order inclusive of:
		    ○ Item Numbers
		    ○ Item Descriptions
		    ○ Quantities
		    ○ Prices
		    ○ Total Spend
		• 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.

2	Retail/Staples.com	The **Retail/Staples.com** column displays "Retail" if the purchase was made in a store and "Staples.com" if the purchase was made online or phone
3	Order Date	The **Order Date** column displays the date that the respective transaction was completed
4	No. of Items	The **No. of Items** column displays the number of products purchased on the specific transaction
5	Order Total	The **Order Total** column displays the total spend amount of the corresponding transaction

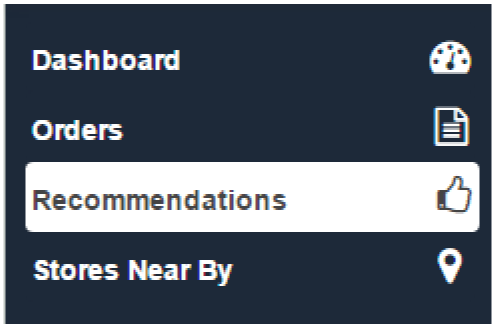
Orders Details – Filter Options

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



#	Category	Description
1	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
2	**Filter**	The **Filter** field allows associates to refine the displayed order list by the order number or the SKU number or the product description. *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.*
3	**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 7 - Recommendations Section

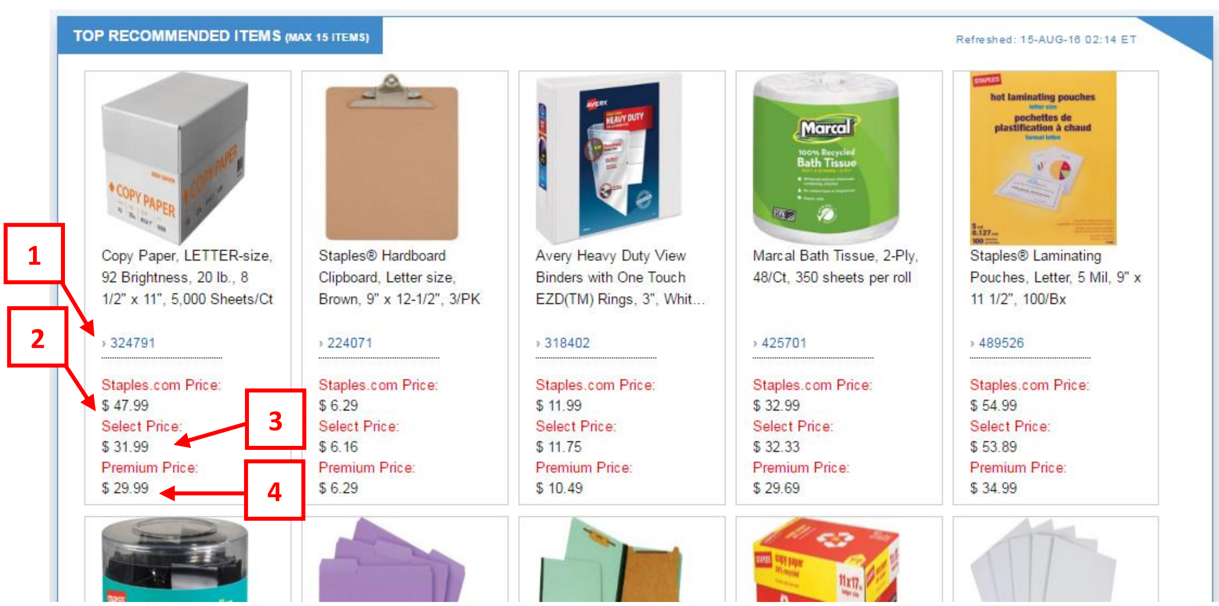


The **Recommendations** tab on the left side of the Dashboard allows access to the **Recommendations** section directly on the main **Dashboard** page.

This section displays at least the top 15 products the customer has purchased over the past year. These are items that are within the mid-market product assortment excluding non-discountable.

Accessing the Recommendations Section

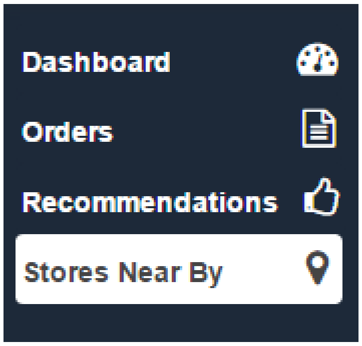
- The **Recommendations** refreshes the **Dashboard** to display the products. Click **Dashboard** to return to the full Dashboard display.
- Selecting Print at the top of the page provides a printout of the Customer Profile information followed by the top 15 recommendations.



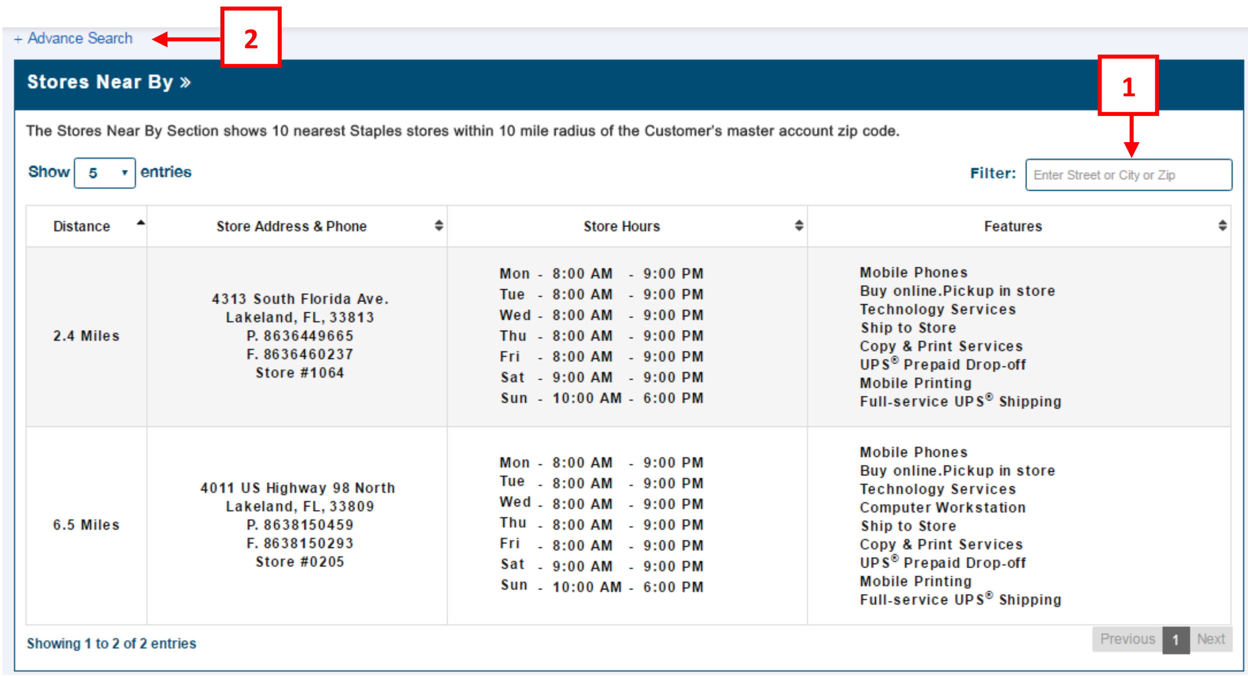
	Category	Description
1	Item's SKU Number	Clicking on the item number will open the product page on StaplesAdvantage.com
2	Staples.com Price	**Staples.com Price** is the amount the customer will pay if they purchase via Staples.com
3	Select Price	**Select Price** is amount the customer will pay if enrolled in the Select program

4	Premium Price	**Premium Price** is the amount the customer will pay if enrolled in the Premium Program

Lesson 8 – 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 Parent account's zip code.

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

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