Helios Training Guide

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 StaplesAdvantage.com and Staples.com. It provides an intuitive 'Call List' that allows associates to determine which customers to call next based on priority. These customers are prioritized based on the maximum likelihood of placing an order, which includes online activity, number of SA.com visits, order history, frequency of orders, last contacted date, and the Account Qualification Score. 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/upsell opportunities
- ✓ Intelligent and context based conversations with customers
- ✓ Prior spending patterns and online activity across the Staples Business Advantage and Staples.com sales business units

Helios Workflow Overview

The diagram below outlines the standard Helios 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.

To Do List – The To Do List is a list of all the Customers / Companies 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 users associated with the customer account, along with the sales order contact (e.g. company cart) and provides order summaries.

Orders –The Orders section contains the customer's last 2 years of order history, as well as the current year. 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.

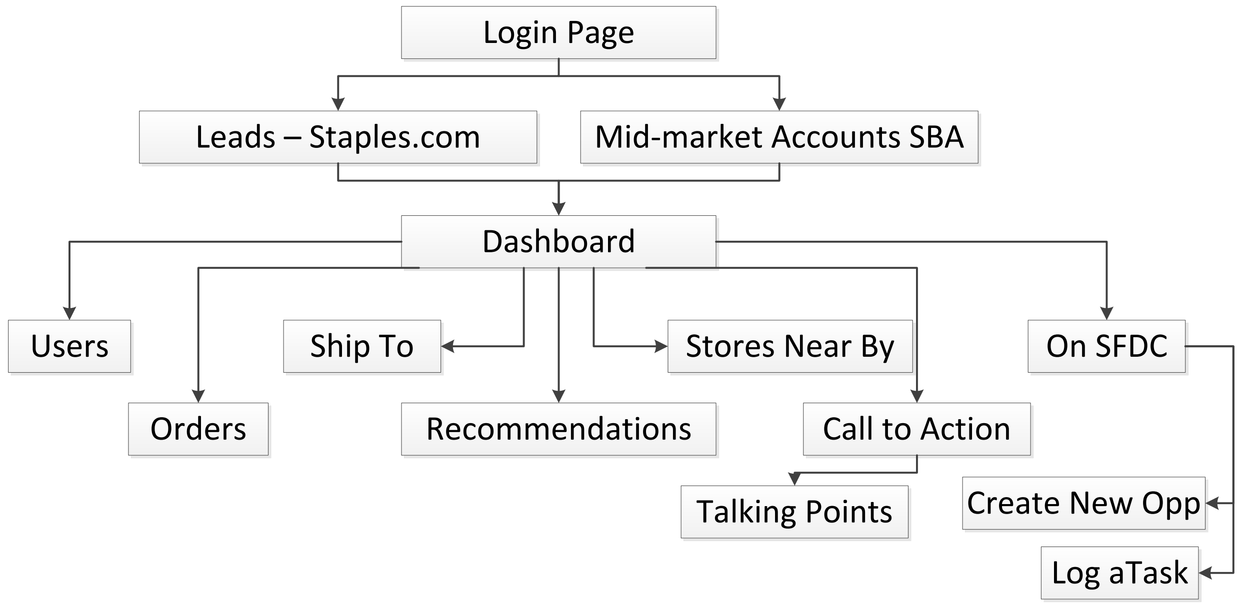
Recommendations – The Recommendations Section provides purchase history and offers suggested products based on customer buying trends.

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

Call to Action – Highlights the sales tactics to be used for this account.

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

Other – Workplace Insights Review provides specific customer buying details and alerts to help better engage with the customer.



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

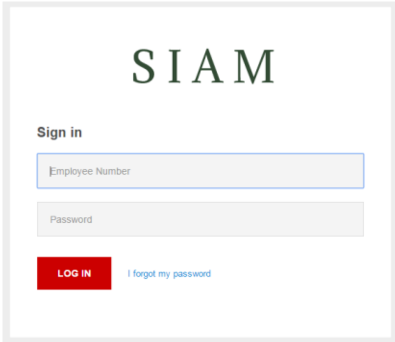
Clearing cache essentially clears browsing history/cookies and will only need to be done once prior to initially accessing the sign on screen. Complete the steps below to clear cache from your Windows Desktop or iPad system.

- **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

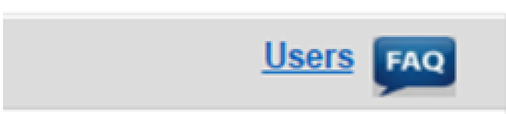
NOTE: *If Account Consultants (ACs) or Account Managers (AMs) are not using the Staples network, they must install the Cisco AnyConnect app as described below, to access Helios.*

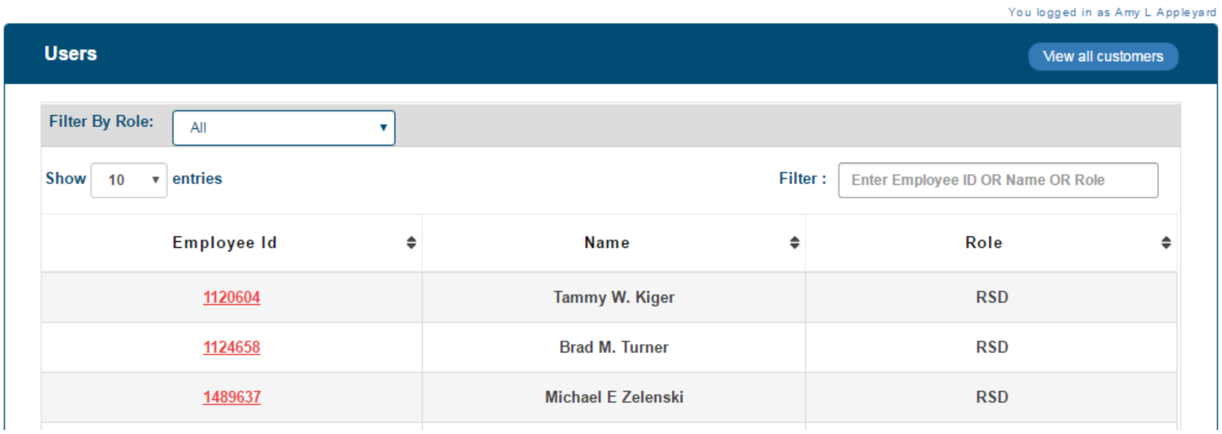
NOTE: *Once logged in, if the screen is blank and you are unable to view any data on the To Do list, refresh the page and content will be displayed.*

ASM/RSD/VP Log in

Sales Leaders have the ability to view their direct reports and corresponding Book of Businesses.

- Default user will view ALL accounts rolling to direct reports
- To Do List may also include a Leads - Staples.com tab; for more information regarding the Lead tab see Appendix - Lead Training Guide
- After clicking "Users" (Upper right-hand corner of platform), all direct reports will be listed in the grid





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

Helios requires users to be on the Staples network; however as long as users 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**

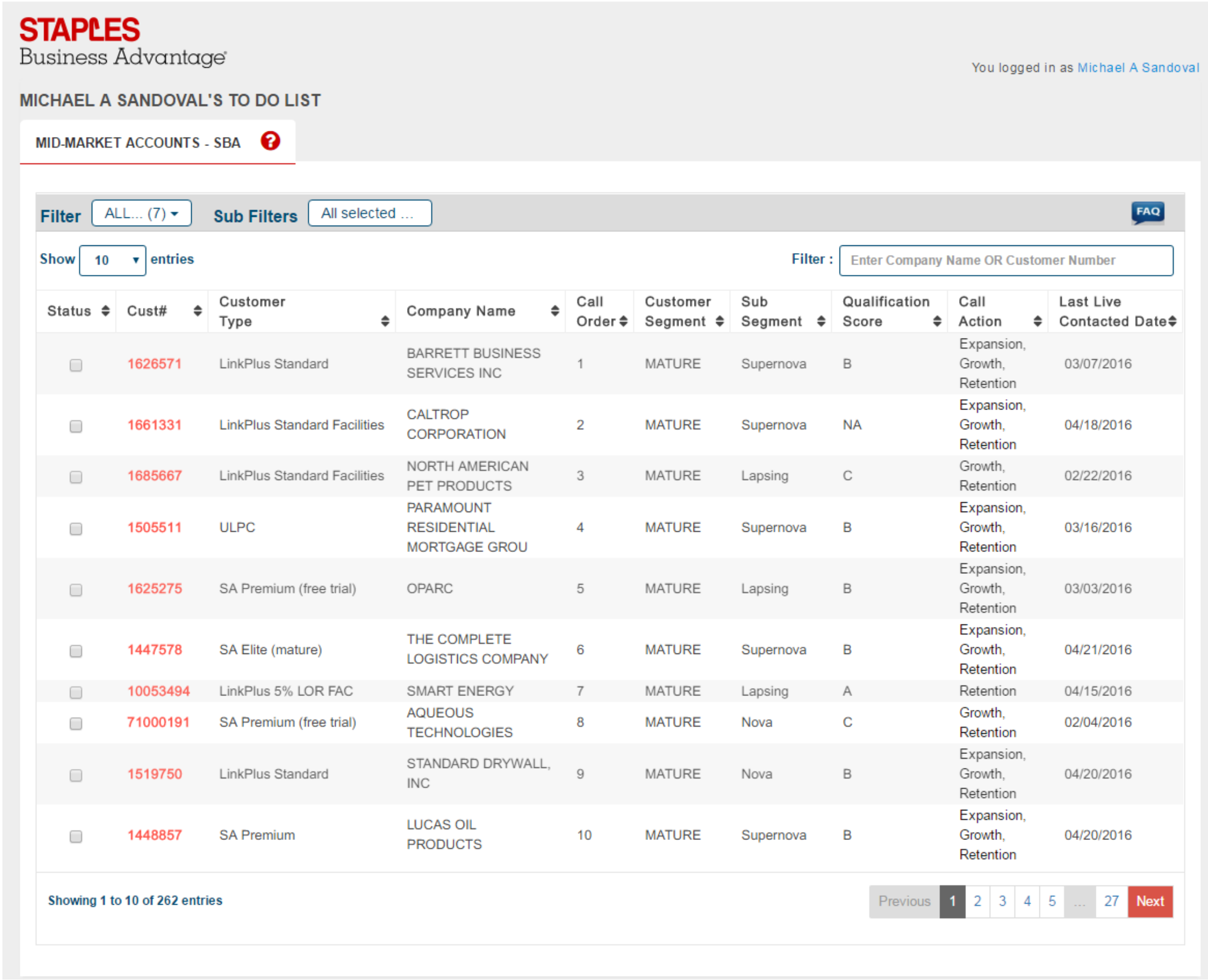
Logging Out

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 the Chrome browser window.

Lesson 3 - To Do List

The **To Do List** displays a prioritized list of all of the Customers / Companies assigned to the associate, their book of business (BOB), as well as an overview of each account. This list is prioritized based on the likelihood of the customer placing an order using the following criteria:

1. **User Online Activity:** Number of sessions on StaplesAdvantage.com in a given time period and the last active date
2. **Order History:** Frequency of orders and the last order date
3. **Last Live Contacted Date:** Number of days since an associate last directly contacted the customer
4. **Account Qualification Score:** Weighting on existing frequency based on account growth potential
5. **Dotcom Activity:** Browsing/purchasing activity on Staples.com
6. **Monetary Value:** Previous purchasing history/spend


STAPLES Business Advantage

You logged in as Michael A Sandoval

MICHAEL A SANDOVAL'S TO DO LIST

MID-MARKET ACCOUNTS - SBA

Filter ALL... (7) Sub Filters All selected ... FAQ

Show 10 entries Filter : Enter Company Name OR Customer Number

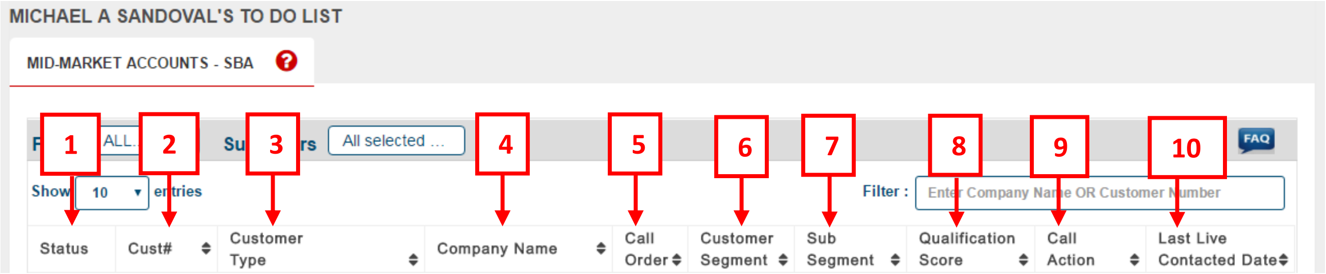
Status	Cust#	Customer Type	Company Name	Call Order	Customer Segment	Sub Segment	Qualification Score	Call Action	Last Live Contacted Date
	1626571	LinkPlus Standard	BARRETT BUSINESS SERVICES INC	1	MATURE	Supernova	B	Expansion, Growth, Retention	03/07/2016
	1661331	LinkPlus Standard Facilities	CALTROP CORPORATION	2	MATURE	Supernova	NA	Expansion, Growth, Retention	04/18/2016
	1685667	LinkPlus Standard Facilities	NORTH AMERICAN PET PRODUCTS	3	MATURE	Lapsing	C	Growth, Retention	02/22/2016
	1505511	ULPC	PARAMOUNT RESIDENTIAL MORTGAGE GROU	4	MATURE	Supernova	B	Expansion, Growth, Retention	03/16/2016
	1625275	SA Premium (free trial)	OPARC	5	MATURE	Lapsing	B	Expansion, Growth, Retention	03/03/2016
	1447578	SA Elite (mature)	THE COMPLETE LOGISTICS COMPANY	6	MATURE	Supernova	B	Expansion, Growth, Retention	04/21/2016
	10053494	LinkPlus 5% LOR FAC	SMART ENERGY	7	MATURE	Lapsing	A	Retention	04/15/2016
	71000191	SA Premium (free trial)	AQUEOUS TECHNOLOGIES	8	MATURE	Nova	C	Growth, Retention	02/04/2016
	1519750	LinkPlus Standard	STANDARD DRYWALL, INC	9	MATURE	Nova	B	Expansion, Growth, Retention	04/20/2016
	1448857	SA Premium	LUCAS OIL PRODUCTS	10	MATURE	Supernova	B	Expansion, Growth, Retention	04/20/2016

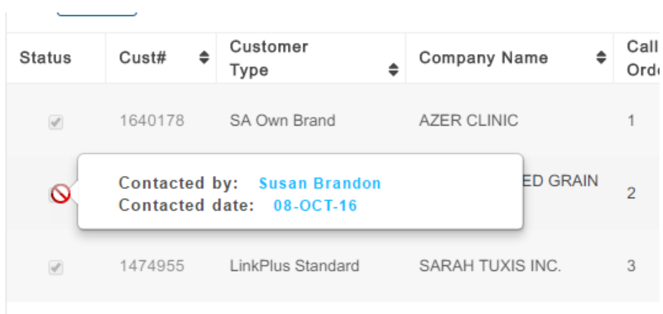
Showing 1 to 10 of 262 entries

Previous 1 2 3 4 5 ... 27 Next

Customer Information

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



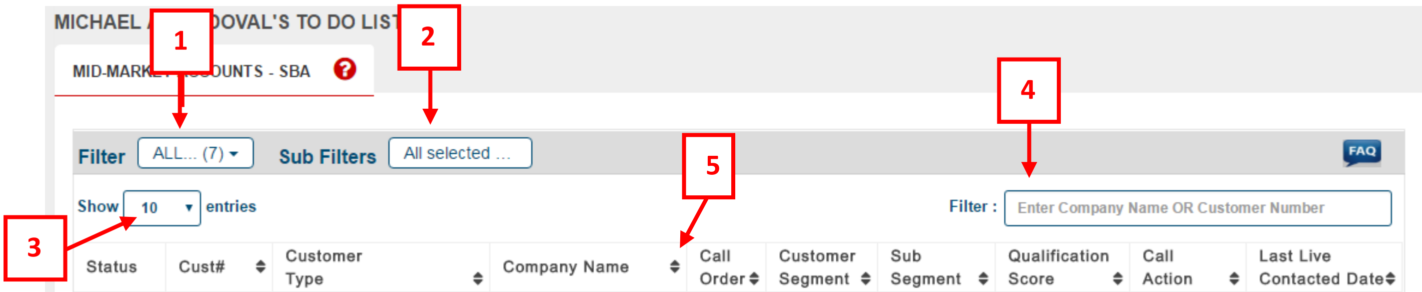
#	Category	Description
1	Status	The Status checkbox allows the user to check the customer when they've been contacted to diminish visibility on the To Do List. After checking the box, the Cust # column text color changes and it is grayed out; it remains in this state for 30 days. Although once checked the record cannot be unchecked by the user, the user may select and view the account's dashboard information. If the customer is checked, hover-over the Status checkbox displays who contacted the customer and the date contacted.  Selecting the sort button on this column will move those checked to the very bottom or top of the To Do List while maintaining the Call Order priorities for those not contacted.
2	Customer #	The Staples customer number associated to this account **NOTE:** Click on to sort each column in either ascending or descending order.
3	Customer Type	The name of the Staples Advantage contract that the customer is a part of
4	Company Name	The name of the Company
5	Call Order	The priority of customers likelihood they will place an order, which is based on spend amount, last live contacted date, purchase and account activity
6	Customer Segment	The maturity segment in which the customer belongs to. There are 3 segments: • **Mature: 13+ Months** • **Transitioning: 7-12 Months** • **Young : 0-6 Months** See Lesson 12 for detailed information regarding customer segments/sub-segments.

7	Sub Segment	There are 9 sub segments that fall into each of the 3 customer segments (Mature, Transitioning, Young): **Mature:** • Defector: Less active, “Value shoppers”, that need to be reminded about the overall value SA delivers • Lapsing: Valuable customers with growth potential; at risk of leaving SA • Nova: Sticky cross-category buyers; high growth potential • Supernova: Our most valuable customers with large spend across almost all core and BOSS categories; make frequent purchases **Transitioning:** • Star Potential: Firm believer in SA; great prospects for more complex products and services • Stars: Moderate core and BOSS spend • Late Adopter: Still need a reason to believe in SA **Young:** • Rising Stars: High initial office and BOSS spend; good growth potential. • Slow Starter: Moderate core and BOSS spend. • Not Engaging: Still need a reason to believe in SA. See Lesson 12 for detailed information regarding customer segments/sub-segments.
8	Qualification Score	The expected value rating assigned to the account: • **A**: Potential for at least $15K annual growth • **B**: Potential for at least $8K annual growth • **C**: Potential for at least $3K annual growth • **D**: DEAD Account • **E**: No Growth
9	Call To Action	A **Call To Action** is identified as areas of growth opportunity. The associate should call the customer to discuss these areas with an effort to increase sales. There are 3 major Play Segments: • **Retention** - Designates there has been a decline in the customer’s purchasing indicating that we need to speak with the customer in an effort to retain their business • **Growth** – Based on product and purchase history there is an opportunity to sell additional categories of products • **Expansion** – Indicates that there is opportunity for customer expansion *For example: If the customer has purchased products which were part of a promotional activity, this signifies that there could be potential expansion within the account.* If a customer does not belong to any of these play segments, then the **Call To Action** column will be blank.

10	Last Live Contacted Date	This column displays the most recent date, as noted in Salesforce.com, the customer was contacted.

Filter, Search Features & 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	Filter	The **To Do List** can be filtered via **Call to Action** categories by using **the Filter by Action** drop-down at the top left of the **To Do List** screen. The four **Call to Action** categories: • ALL • Play Segment: Growth, Retention, Expansion, Customer Segment: Mature, Young , Transitioning • Qualification Score
2	Sub Filters	• **Sub filters** work in conjunction with the **Filter** drop-down; They provide the option to further narrow the **To Do List** by defining additional filter parameters • Sub-filters are available for each **Play Segment, Customer Segment, and Qualification Score** • Filter options are only displayed for **Call to Actions** which have been selected in the **Filter by Action** drop-down. Any **Call to Actions** which have not been selected will be greyed out/unavailable • When proceeding to the **Dashboard**, the selected **Call To Action** will be displayed on the left sidebar column in the **Call to Action** section
3	Show Entries	• The **Show Entries** drop-down, by default, shows 10 customers 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

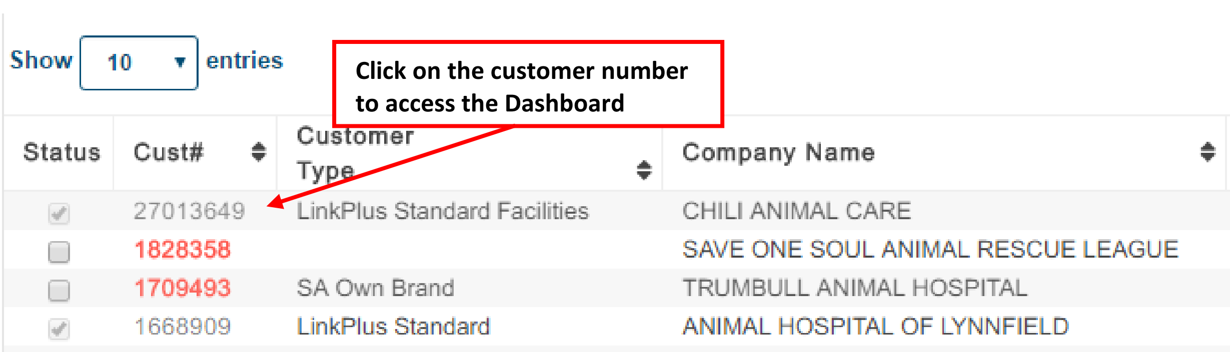
4	Search	• Accounts can be quickly located by leveraging the **Filter** within the To Do List. This can be especially useful with large customer lists because you can easily retrieve the one customer you need. • The associate may search by company name or customer number • This **Search** box is a smart 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
5	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.

NOTE: *Filters and/or Sub Filters used on the To Do list will also be used for the display on the dashboard sliding door* .

Lesson 4 - Customer Dashboard

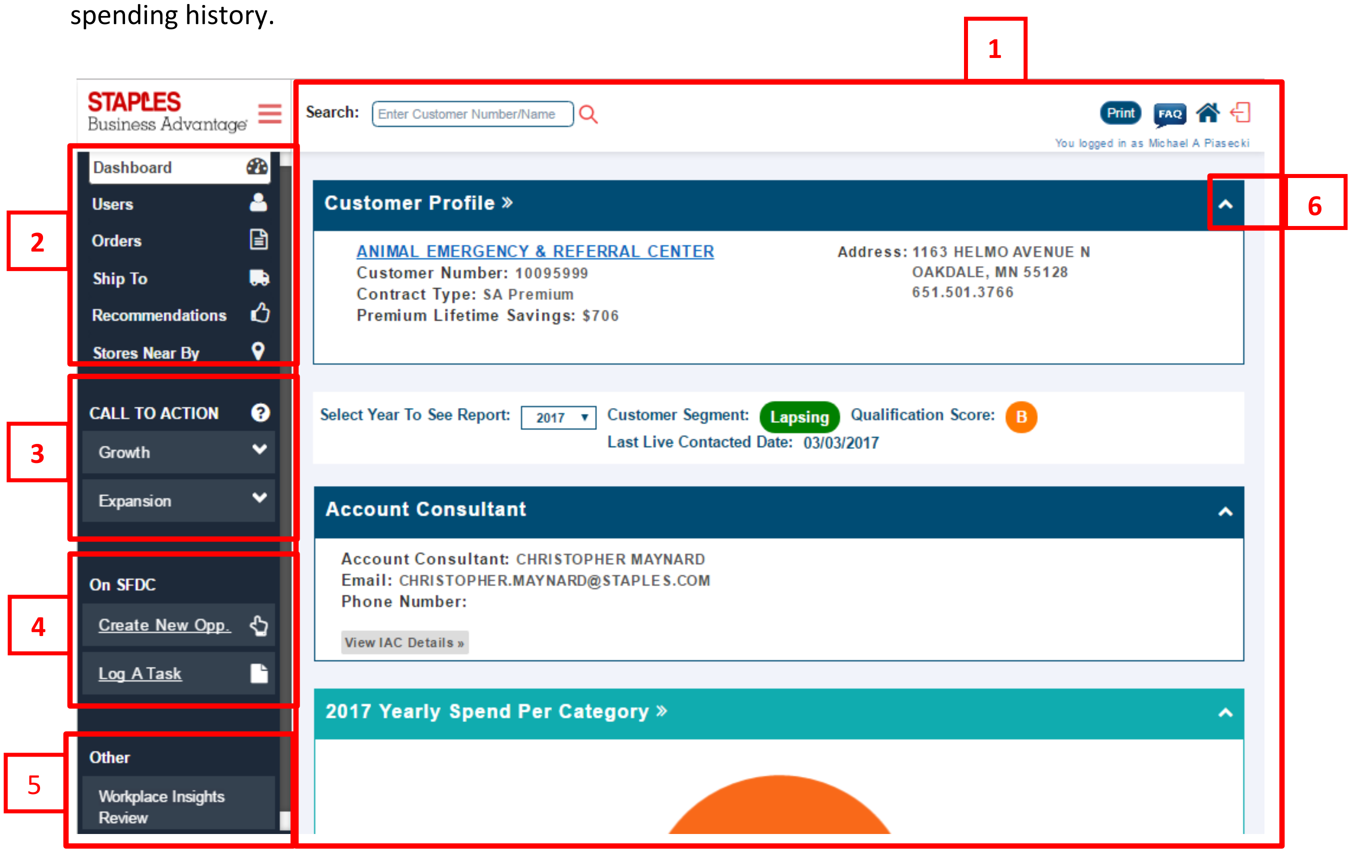
Accessing the Dashboard

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.



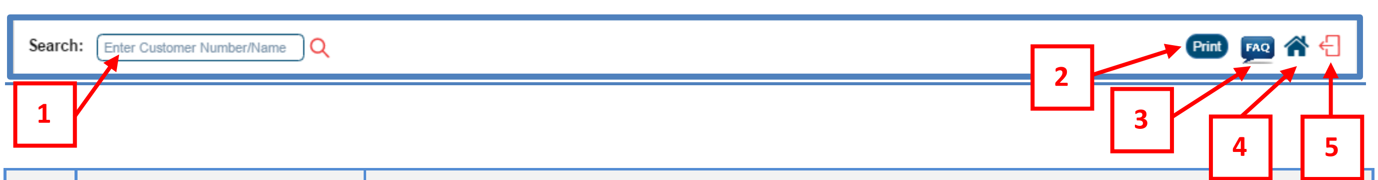
#	Category	Description
1	Dashboard Sections	The **Dashboard** contains the following sections on the main area which provide a 360 degree view of the account and purchasing history for the last 3 years: • Customer Profile • Account Manager • Year to Date Spend Per Category • SA.com Differentiators • Yearly Summary • Year to Date Spend Per Month • Monthly Spend Analysis

2	Dashboard Tab Sections	• The Dashboard has **Dashboard Tab Sections** that access and 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:
		    ▪ “Users Section”
		    ▪ “Orders Section”

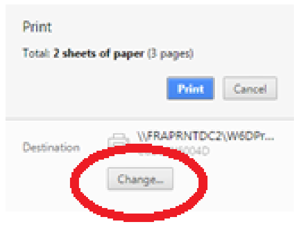
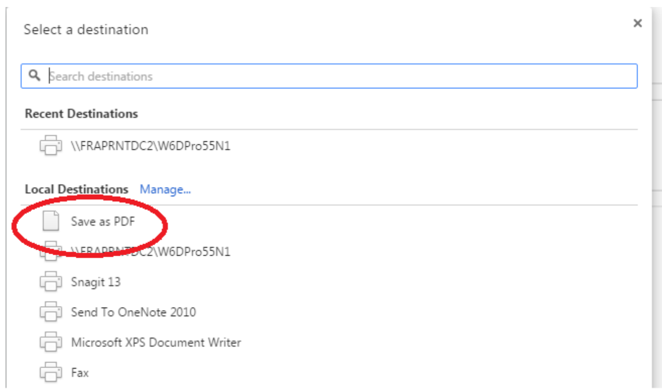
		▪ "Ship To Section" ▪ "Recommendations Section" ▪ "Stores Near By Section"
3	Call to Action	The Dashboard lists the following **Call to Action** categories for the customer based on that customer's eligibility. This is covered in more depth in the "Call to Action Section" of this training guide: ▪ Growth ▪ Retention ▪ Expansion
4	On SFDC	The **On SFDC** provides quick links to punch-out to Salesforce.com. • Create New Opp – opens Salesforce.com login or if already logged on, opens directly to the New Opportunity Page • Log A Task - opens Salesforce.com login or if already logged on, opens directly to the SBA IAM Task Record Type page
5	Other	Other currently contains Workplace Insights Review which opens a new dashboard with specific analysis on the customer behavior
6	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 • 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 **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. ***NOTE:*** *The Sliding Door will use the Filters and/or Sub Filters set on the To Do List.*

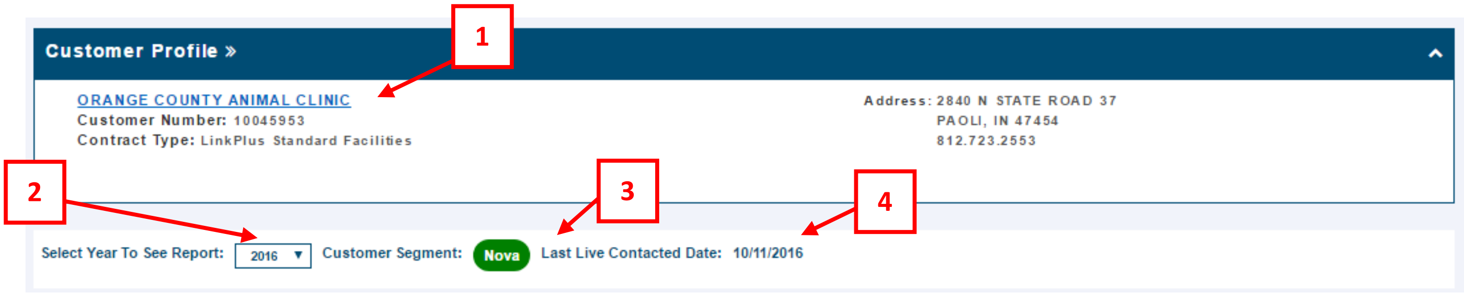
Lesson 5 - Dashboard Sections

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
- Account Consultant
- SA.com Differentiators
- Yearly Spend Per Category
- Yearly Summary
- Yearly Spend Per Month
- Monthly Spend Analysis

Customer Profile

The Customer Profile section provides pertinent details about the customer including company name, customer number, address, Staples Business Advantage contract type, Premium Lifetime Savings (if applicable), customer segment and qualification score.



1. Clicking the hyperlink on the Company Name opens the Salesforce.com login page and the Account page.
2. The dropdown in **Select 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 this particular segment and definitions for the others.
4. Last Live Contacted Date is the most recent date, as noted in Salesforce.com, that the customer was contacted.

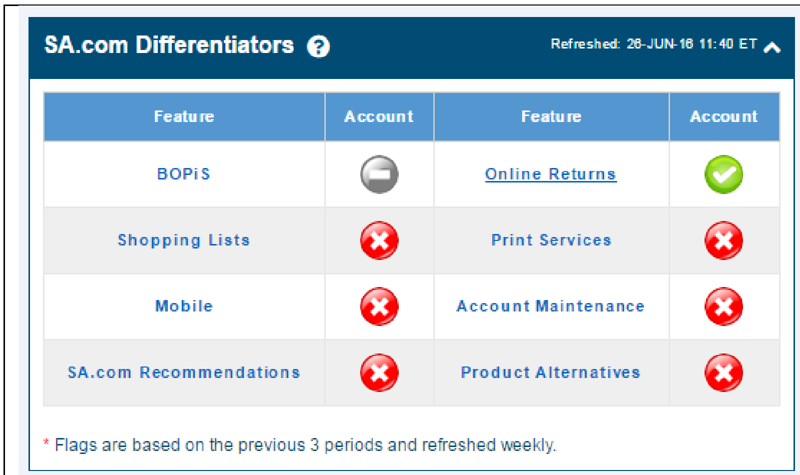
Account Consultant

The Account Manager section displays the name of the Account Manager that owns the account (i.e. CAM, IAM or AC and IAC), the email address of the Account Manager and their work phone number.

1. Since IAC/AC accounts are co-managed, information for both can be seen by clicking View IAC Details / View AC Details.

SA.com Differentiators

This grid displays the SA.com features used by the customer in the last 3 periods; the values are refreshed weekly.



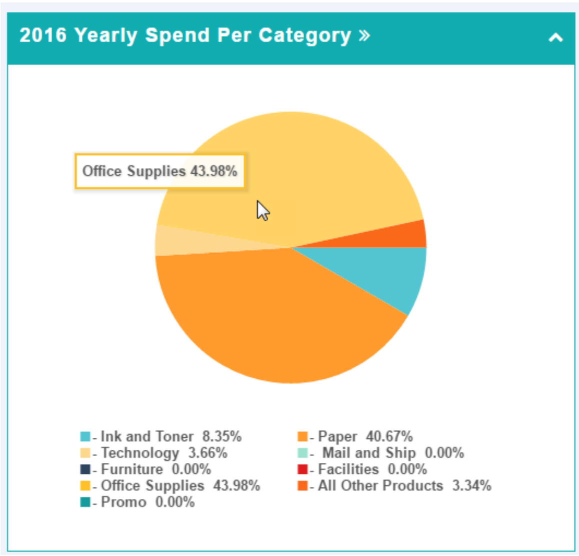
- GREY dash - Customer is not enabled to use the feature. Applicable only to BOPiS and Print Services
- GREEN check - Customer has used the feature
- RED cross - Customer is not using the feature

If the customer has used Online Returns, clicking the hyperlink will open the Orders area to display the latest orders with returns. **NOTE:** *This will display any orders with returns regardless of the return method used.*

Select ? to open the SA.com Features Guide. This outlines questions and feature details for each option to help promote the benefits to the customer.

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 their overall spend for the year in the following nine product categories:

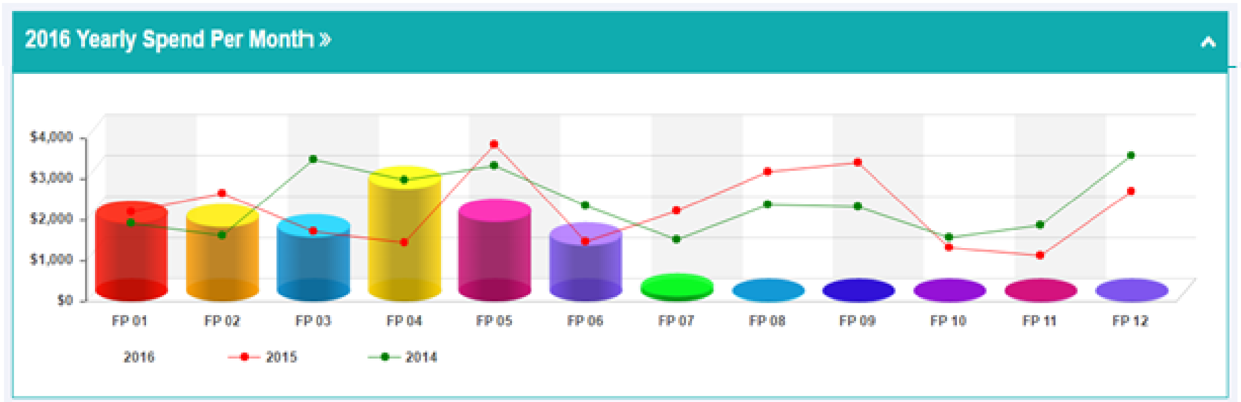
- Ink & Toner
- Paper
- Technology
- Mail and Ship
- Furniture
- Facilities
- Office Supplies
- All Other Products
- Promo

Yearly Summary

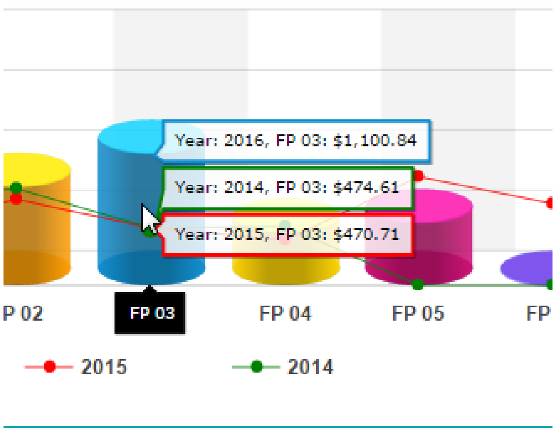
The **Yearly Summary** section provides a snapshot of the three most recent year's total spend activity, inclusive of the current and prior two.

Yearly Spend Per Month

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



- The cylinders show the current year's year-to-date spend per fiscal period and the different color lines each present the previous two 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. 2016, 2015, and 2014)
- 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 »

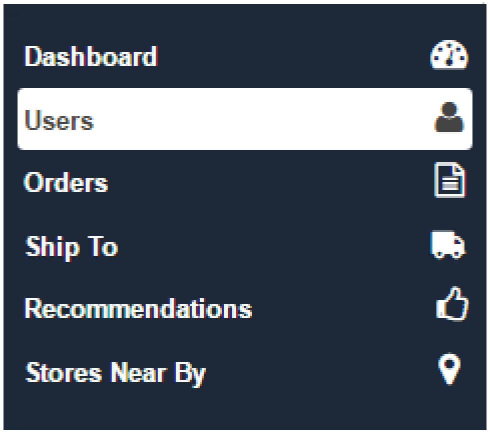
Month	Ink & Toner	Paper	Tech	Mail & Ship	Furniture	Facilities	Office Supplies	All Other Products	Print/Promo	Total
FP 01	$791.96	$429.89	$229.90	$0.00	$101.53	$912.30	$919.67	$237.01	$0.00	$3,622.26
FP 02	$1,613.80	$149.89	$750.03	$0.00	$0.00	$842.39	$574.25	$98.27	$0.00	$4,028.63
FP 03	$1,507.91	$304.35	$217.48	$0.00	$0.00	$3,107.13	$415.95	$58.77	$0.00	$5,611.59
FP 04	$0.00	$179.95	$44.85	$0.00	$668.33	$814.43	$670.83	$127.69	$0.00	$2,506.08
FP 05	$2,941.90	$491.91	$997.49	$0.00	$8.09	$1,412.05	$815.74	$192.31	$0.00	$6,859.49
FP 06	$0.00	$148.10	$335.16	$0.00	$0.00	$227.49	$306.01	$0.00	$0.00	$1,016.76
FP 07	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total	$6,855.57	$1,704.09	$2,574.91	$0.00	$777.95	$7,315.79	$3,702.45	$714.05	$0.00	$23,644.81

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 thus far in the year selected, along with the purchasing spend per category, as well as total spend for that fiscal period

Lesson 6 – Users Section



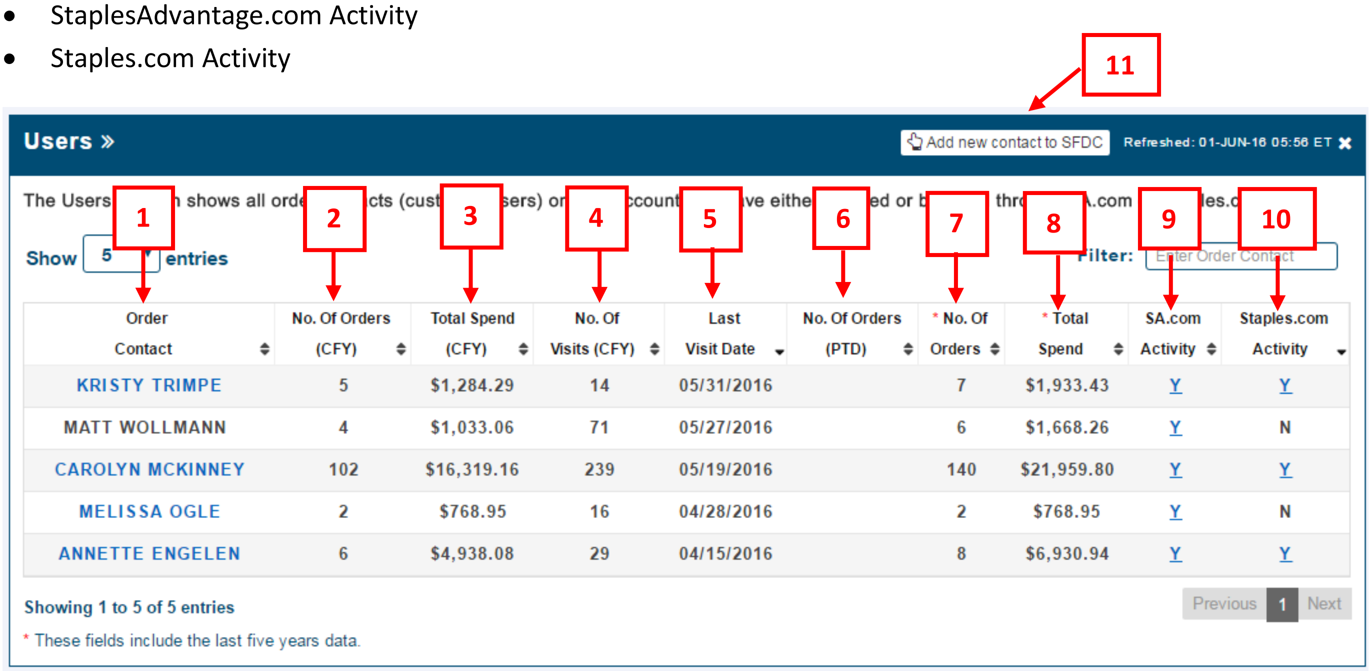
Clicking the **Users tab** on the left side of the Dashboard will allow associates to access the **Users Section** directly on the main **Dashboard** page.

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

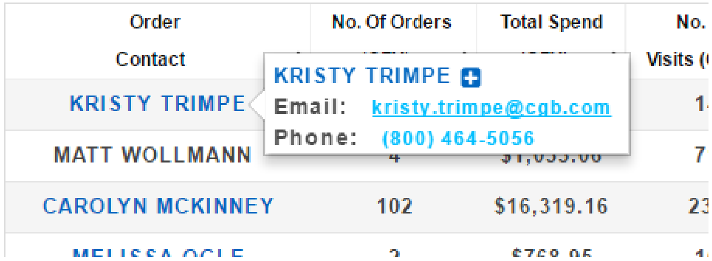
Users Information

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

- Order Contact
- Number of Orders (CFY)
- Total Spend (CFY)
- Number of visits (CFY)
- Last Visit Date
- Number of Orders (PTD)
- Number of Orders
- Total Spend
- StaplesAdvantage.com Activity
- Staples.com Activity

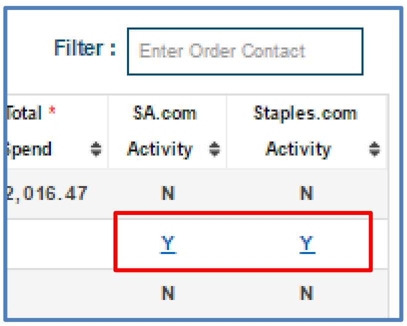


Order Contact	No. Of Orders (CFY)	Total Spend (CFY)	No. Of Visits (CFY)	Last Visit Date	No. Of Orders (PTD)	* No. Of Orders	* Total Spend	SA.com Activity	Staples.com Activity
KRISTY TRIMPE	5	$1,284.29	14	05/31/2016		7	$1,933.43	Y	Y
MATT WOLLMANN	4	$1,033.06	71	05/27/2016		6	$1,668.26	Y	N
CAROLYN MCKINNEY	102	$16,319.16	239	05/19/2016		140	$21,959.80	Y	Y
MELISSA OGLE	2	$768.95	16	04/28/2016		2	$768.95	Y	N
ANNETTE ENGELEN	6	$4,938.08	29	04/15/2016		8	$6,930.94	Y	Y

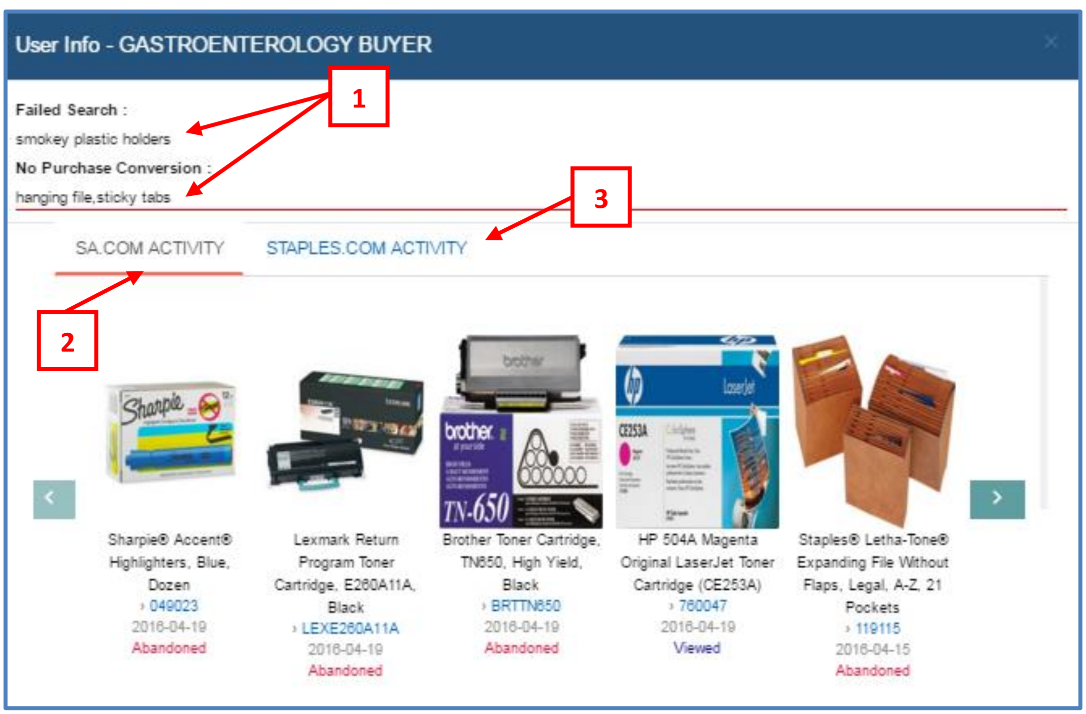
	Category	Description
1	Order Contact	Name of the contact placing orders for the account. When the Order Contact is in blue, hover over and click provides customer contact details. To add this contact to Salesforce, click the When the Email address link is clicked, an Outlook email for this contact will open.  *Note: The name is in Black print if* *contact details are not available or* *this is not an active contact or* *this name is not used to order via their login on SA.com site.*
2	No. of Orders (CFY)	Number of orders placed within the current fiscal year
3	Total Spend (CFY)	Total account spend within the current fiscal year
4	No. of Visits (CFY)	Total number of visits on StaplesAdvantage.com within the current fiscal year
5	Last Visit Date	Last date the customer visited StaplesAdvantage.com
6	No. of Orders (PTD)	Total number of orders placed the period to-date.
7	No. of Orders	Total number of orders placed within the past 5 years
8	Total Spend	Total account spend within the past 5 years
9	SA.com Activity	• This column displays a Yes(Y) or No(N) showing if the current user has been accessing and purchasing products on StaplesAdvantage.com • If there has been customer activity, clicking on the **Y** hyperlink within the **SA.com Activity** column will open the **User Info** -StaplesAdvantage.com window • Refer to the User Info details on the StaplesAdvantage.com activity window
10	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

		• 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 • Refer to the User Info details on the Staples.com **window**
11	Add new contact to SFDC	Selecting this option opens the New Contact form where the contact for this account to be added on Salesforce.com

User Info - StaplesAdvantage.com & Staples.com

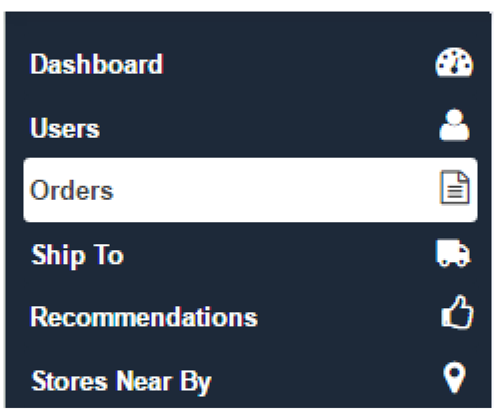


The **User Info** window will populate when a user clicks on "Y" if the customer has SA.com or Staples.com activity. This activity includes, Failed Searches, No Purchase Conversions, SA.com Activity and Staples.com Activity (Including if viewed or abandoned).



	Category	Description
1	Failed Search & No Purchase Conversion	The **Failed Search** lists products that customers browsed for but did not have a matching search result. The **No Purchase Conversion** displays products the customer viewed but did not purchase.
2	SA.com Activity	• The **SA.com** window lists products that were viewed or added to the StaplesAdvantage.com shopping cart, but not purchased. • It displays an image of each product, along with its item number and date the product was viewed • Clicking on the item number will bring the associate to the product page on Staples.com. Please note that the associate will be directed to view the product information on Staples.com, as a contract login is needed for StaplesAdvantage.com. If product information does not display, it could mean that the product is not sold on Staples.com. **NOTE:** *From time to time, the following message may display instead of the product image, "Sorry image not available". In this instance, the associate should still try accessing the product link, however it could mean that the product is not a SKU on Staples.com*
3	Staples.com Activity	The **Staples.com Activity** window lists product SKU's that were • Viewed • Abandoned • Purchased

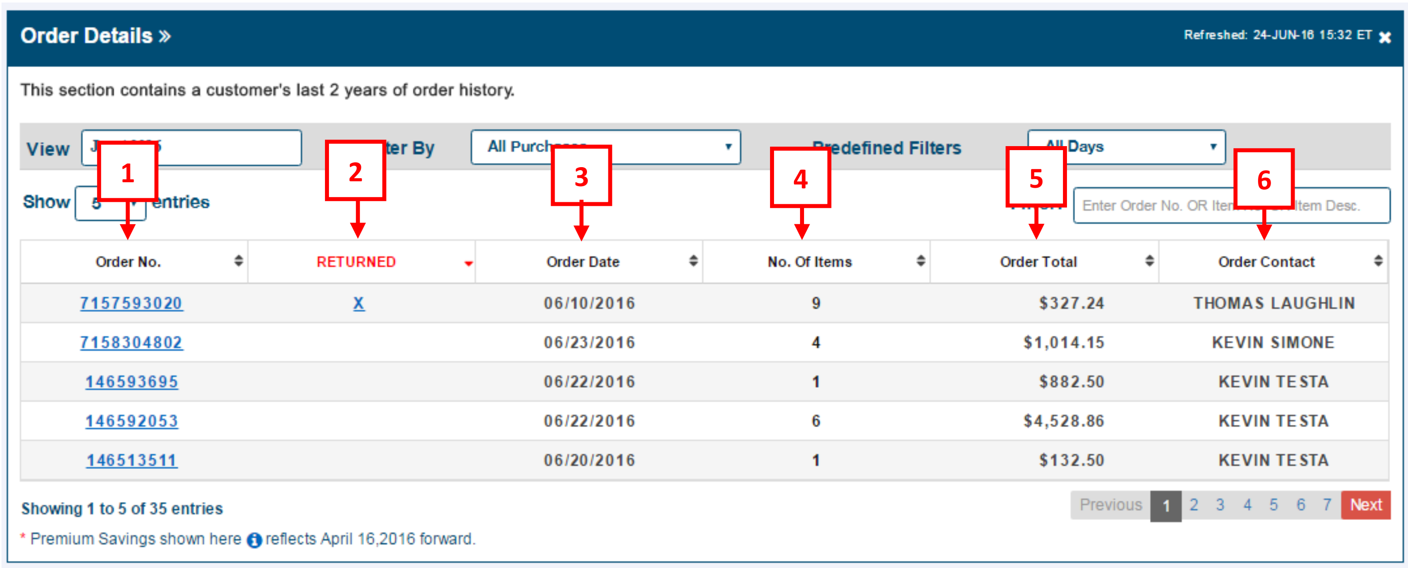
Lesson 7 - Orders Section



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.



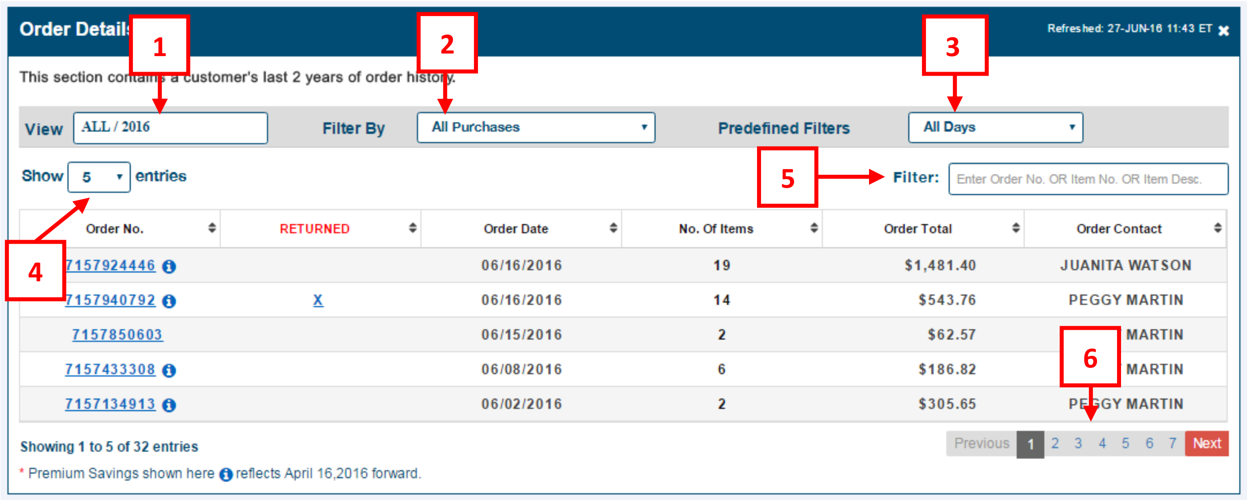
	Category	Description

1	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	Returned	The **Returned** column displays an X if one or all items in an order were returned. View the returns by clicking the X. See Returned Information for details.
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 on the specific order
5	Order Total	The **Order Total** column displays the total spend amount of the corresponding order
6	Order Contact	The **Order Contact** column

Orders Details – Filter Options

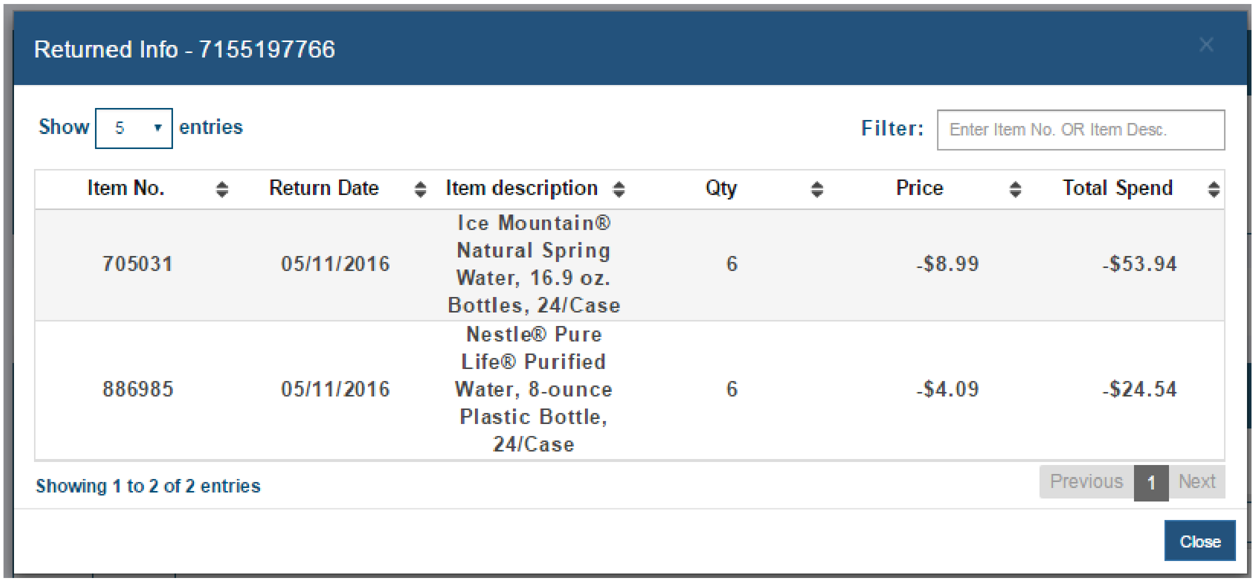
The **Orders Details** section has several additional features for filtering, searching and navigation.



	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	Premium Savings Info Icon	Icon displays when a Premium Account purchased an item or items contributing to cost savings as a result of their Premium Membership. Hover-over text box will display a breakdown of which item(s) contributed to their savings.
6	Filter	The **Filter** field allows associates to refine the displayed order list by Order No. OR Item 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.*
7	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.

Returned Information

The **Returned Info** page displays after clicking the X on the **Order Details** page. Returned Info displays the details associated with any returned items from the selected order:



Returned Info - 7155197766

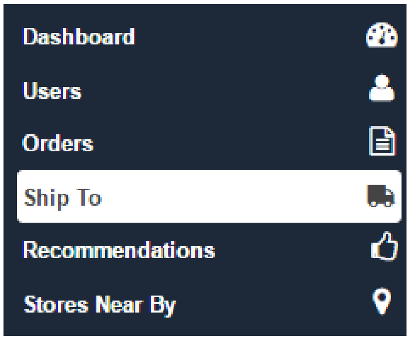
Show 5 entries Filter: Enter Item No. OR Item Desc.

Item No.	Return Date	Item description	Qty	Price	Total Spend
705031	05/11/2016	Ice Mountain® Natural Spring Water, 16.9 oz. Bottles, 24/Case	6	-$8.99	-$53.94
886985	05/11/2016	Nestle® Pure Life® Purified Water, 8-ounce Plastic Bottle, 24/Case	6	-$4.09	-$24.54

Showing 1 to 2 of 2 entries Previous 1 Next

Close

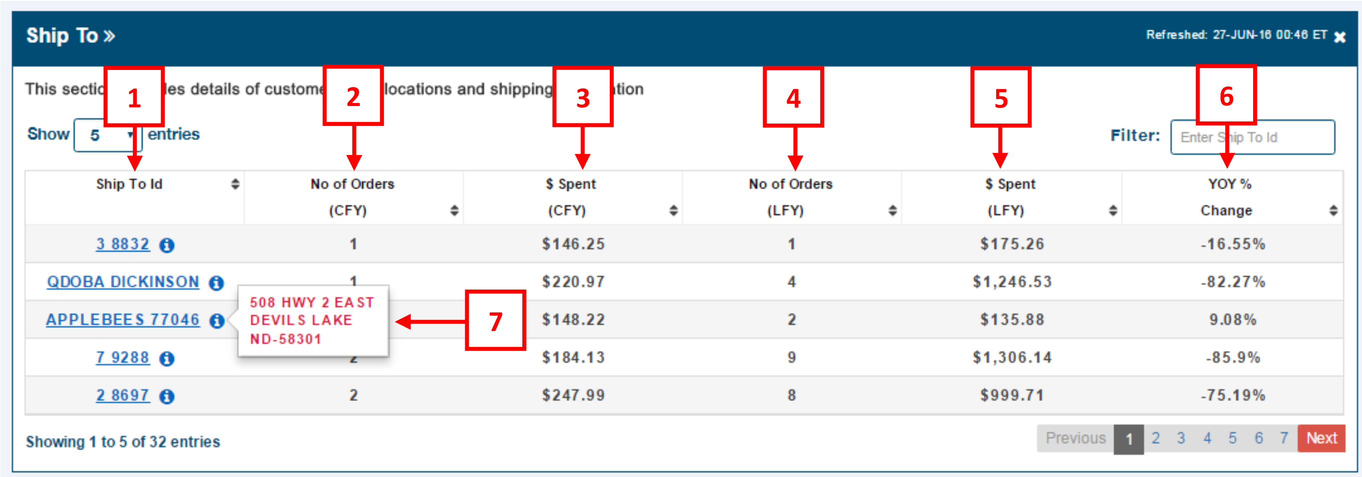
Lesson 8 - Ship To Section



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

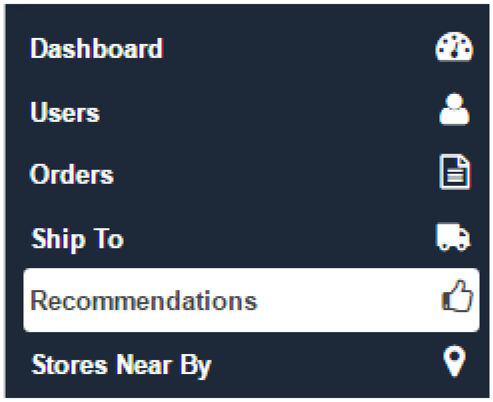
Ship To Information

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 StaplesAdvantage.com; Hovering over the hyperlink will display ship to details
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

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.

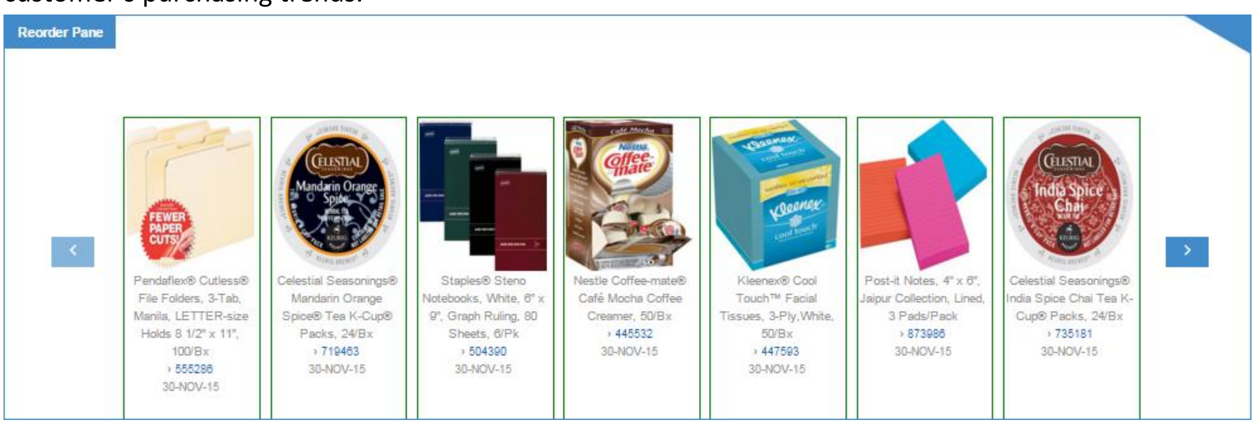
The **Recommendations** section provides two sub-sections – the **Reorder Pane** and the **Bought Also Bought** recommendations, which are detailed below.

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

Reorder Pane

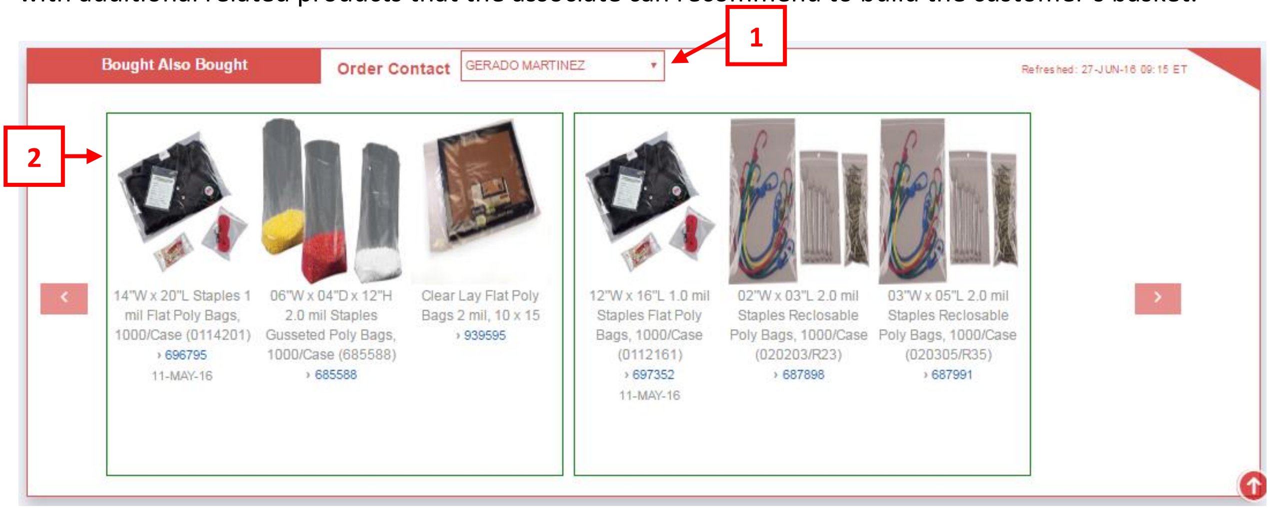
The Reorder Pane provides associates with the opportunity to suggest additional products based on the customer's purchasing trends.



- 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 most recent product to be purchased

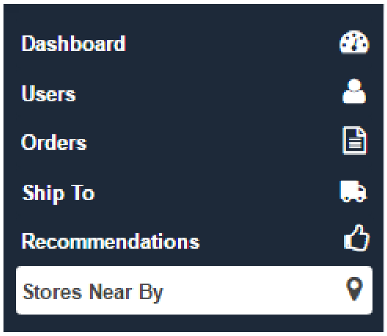
Bought Also Bought

The **Bought Also Bought** section displays products that the customer has previously purchased along with additional related products that the associate can recommend to build the customer's basket.

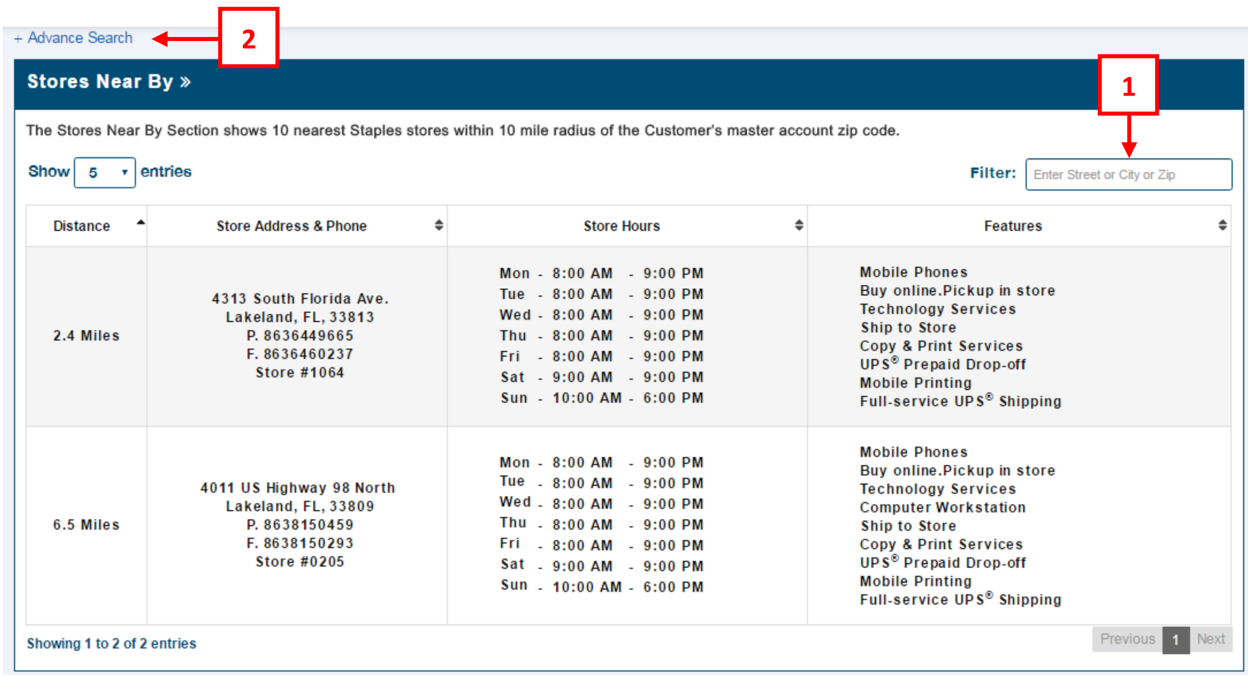


1. **Order Contact**
    - The **Order Contact** drop-down menu will display multiple order contacts if there are various contacts that make purchases on the account
    - If there are multiple order contact on an account, the one who has made the most recent purchase is displayed by default
2. **Product Recommendations**
    - Each **Product Recommendations** section displays a product the currently selected **Order Contact** has purchased on the left, along with recommended product(s) to the right they may be likely to purchase or should purchase as they are related to the original product.
    - Purchases, along with their recommended related products, are listed in separate sections by date in descending order, starting with the most recent purchased product
    - Clicking on the order number of products displayed will route to that SKUs product information screen on Staples.com
    - Some of the products will not be displayed or available to view if they are currently unavailable on Staples.com. While the system may want to suggest certain products which may be available on StaplesAdvantage.com, this feature currently only points to Staples.com products.

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 Parent 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 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, Zip.

Lesson 11 – Call to Action

The **Call to Action** tabs located on the left sidebar column of the **Dashboard** provides suggested sales tactics for the Account Manager to leverage with the goal of retaining and growing accounts. The three **Call to Action Segments** are:

- **Growth**
- **Retention**
- **Expansion**

Each of the three **Call to Action Segments** feature **Play Types** that are populated based on the customer's defined **Call to Action Segment** and growth opportunity. To view the applicable Play Types for the customer, click For detailed information regarding each active Call To Action, click .

Examples of Play Types

Expansion:

- Monthly: Purchased K-cup SKUs during promo launch period
- Weekly: Customer has abandoned carts, check Users section

Retention:

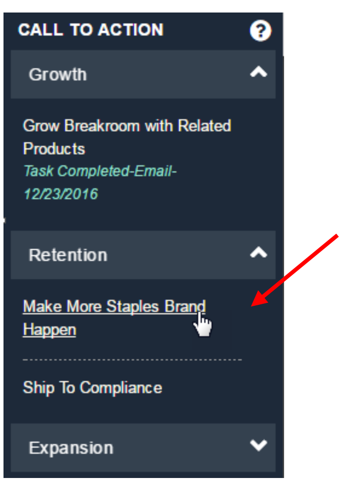
- Monthly: Sell Staples Brand SKUs to this large account, buying < 25% Staples Brand
- Monthly: Declining Facilities Spend - Orders are down > 50% last 3 periods for Facilities

Growth:

- Monthly: Account is Financial or Retail; Sell Furniture category - likely to purchase
- Monthly: Sell Office Products to account; Already buying Ink/Toner & Paper

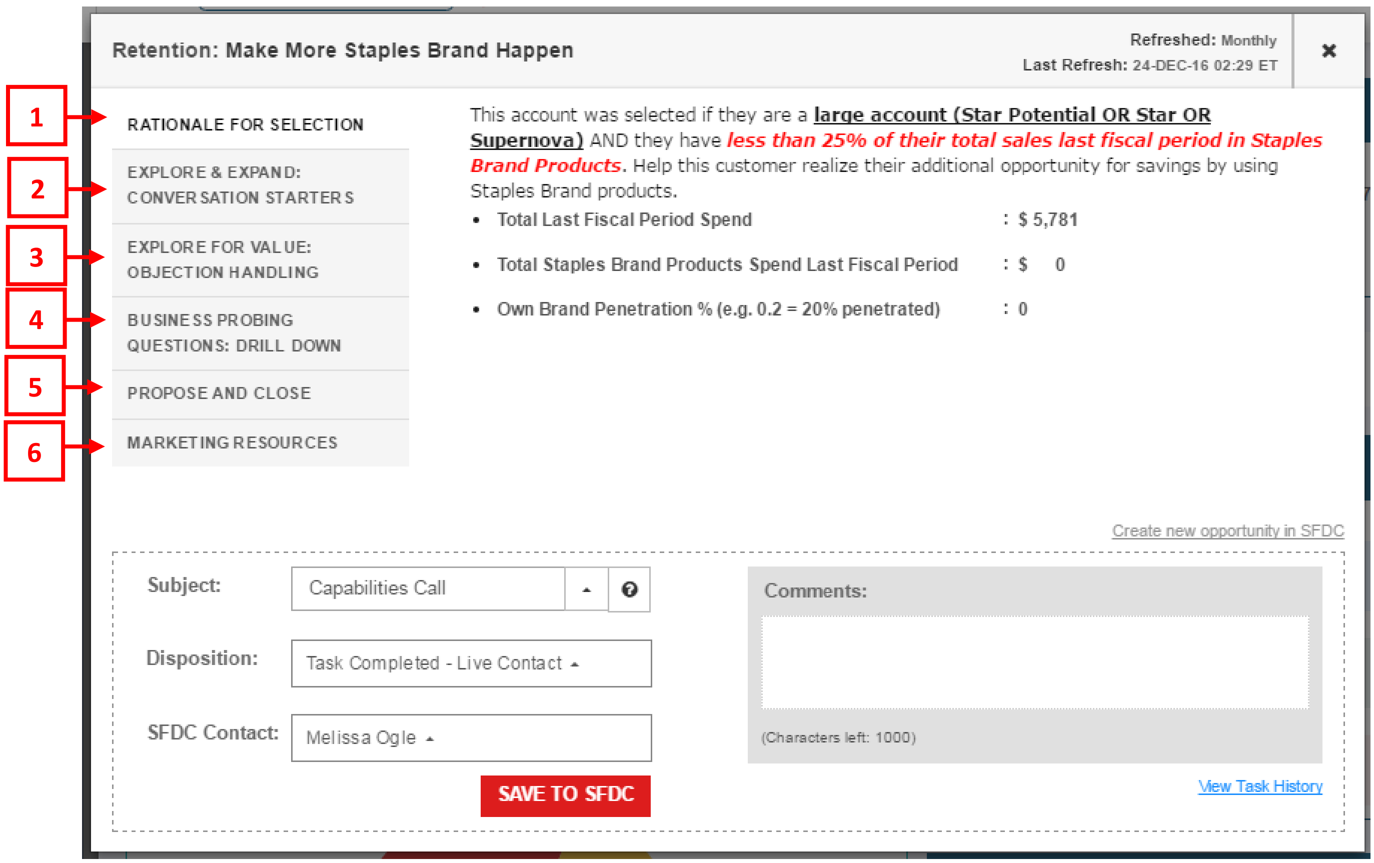
Talking Points

Each Call to Action provides the user with Talking Points to help engage with the customer and close the deal. To open the Talking Points, click on the Call to Action:



The Talking Points include one or many of the following:

1. The rationale for the selection in this alert
2. Conversations starters
3. How to handle objections
4. Tips on how to drill for the order
5. Propose and close the order
6. Links to Marketing resources that provide more product details



Within the Talking Points users can log action taken or create an opportunity.

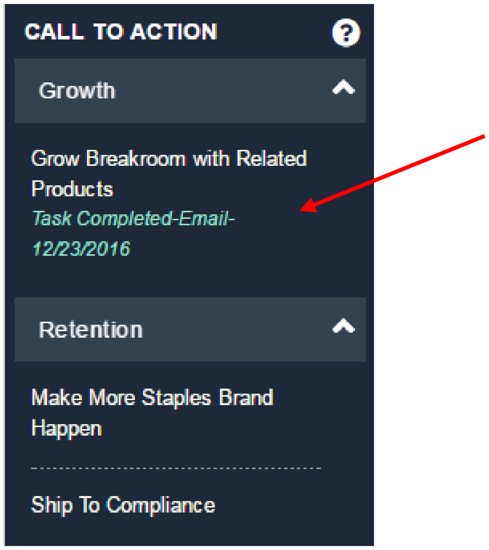
Create a SFDC task:

1. Select the appropriate Subject from the dropdown ▲ or enter free-hand text.
   Note: There is an 80 character limit in the Subject area.
2. Select the appropriate disposition from the drop-down Not Started ▲ and click SAVE TO SFDC
3. Remarks can be captured in the **Comments** section; this is optional.

4. The SFDC Contact button displays all the customer's SFDC contacts and when a contact is selected, the SFDC task will include this name; this is optional.

   Note: If the name desired is not in the list, return to the dashboard and Add new contact to SFDC. Allow 24 hours for the new contact to appear in Helios.

After a Task is saved to SFDC, the Call to Action is updated on the dashboard displaying the most recent disposition:

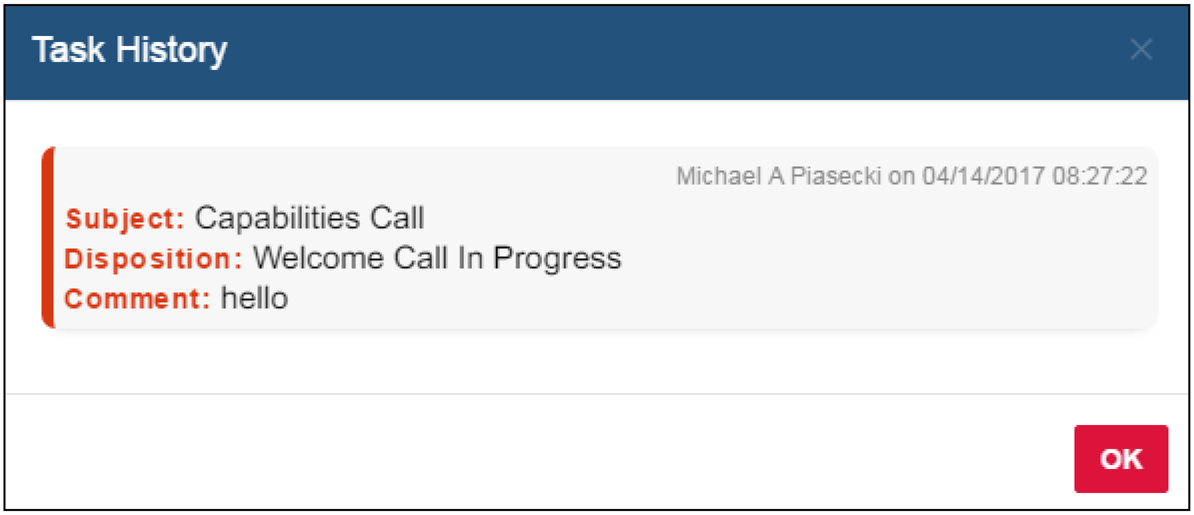


Create a SFDC opportunity:

1. Select Create new opportunity in SFDC
   a. SFDC will open and display the Opportunity page in SFDC. Note: If not already logged in to SFDC, the login page will appear first

View comment/task/disposition history:

1. Select View Task History will display the Comment, Disposition, and the name of the person, date and time the Task was created.
   Note: Task History is cleared each time the Call to Action is refreshed; for example, a monthly Call to Action will display no history after the first of the month.


Task History
Michael A Piasecki on 04/14/2017 08:27:22
Subject: Capabilities Call
Disposition: Welcome Call In Progress
Comment: hello
OK

Lesson 12 – Customer Segment

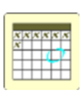
Customer Segment

Customer Segment is based on the "Value – Attrition – Potential" (VAP) of an account and is a predictive model that segments customer behavior. It provides a lifecycle and value-based segmentation framework that allows associates to focus on nurturing and engaging customers that will optimize customer value. Through customer segmentation, Midmarket accounts with the highest potential value and greatest risk of attrition, are identified. Leveraging this information will help associates establish stronger customer connections and drive desired customer purchasing behavior.

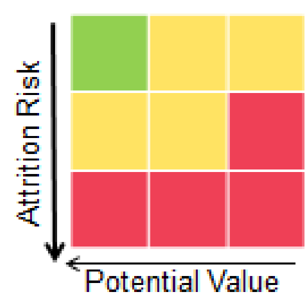
Customer Segmentation

There are three foundations to Customer Segmentation: Tenure, ordering behaviors and risk of attrition or defection and potential value. These Customer Segmentations help to maximize customer's potential with Staples. Outlined below are descriptions of each:.

Tenure		
0-6 Months YOUNG	**7-12 Months** TRANSITIONING	**13+ Months** MATURE

Ordering **behaviors** and key metrics	
	Revenue
	Average Order Size
	Average Order Interval
	# of Categories including paper, ink and toner

Within each tenure group, **risk of attrition (defection)** and **potential value** further segments accounts



Ten Segments

Within the three foundations of Customer Segmentation, there are ten Customer Segments within, which are outlined below.

YOUNG 0-6 Months			TRANSITIONING 7-12 Months			MATURE 13+ Months			
Rising Stars	Slow Starter	Not Engaging	Stars	Star Potential	Late Adopter	Super Nova	Nova	Lapsing	Defect or

Young – 0 to 6 Months

- Rising Stars – High initial office and BO$$ spend, show good growth potential
- Slow Starter – Has moderate core and BO$$ spend
- Not Engaging – Still needs a 'reason to believe in Staples Advantage'

Transitioning – 7 to 12 Months

- Stars – Firm believers in Staples Advantage, great prospects for more complex products and services
- Star Potential – Has moderate core and BO$$ spend
- Late Adopter – Still needs a 'reason to believe in Staples Advantage'

Mature – 13+ Months

- Supernova – Our most valuable customers with large spend across almost all core and BO$$ categories; these customers make frequent purchases
- Nova – Sticky cross-category buyers with high growth potential
- Lapsing – Valuable customers with growth potential, however are at risk of leaving Staples Advantage
- Defector – Less active, 'value shoppers', that need to be reminded about the overall value that Staples Advantage delivers

High Potential Segments

Typically these are our favorite accounts and with proper positioning and the right contact, these could become profitable accounts. Therefore, we need to recognize this and further educate these customers. Please note the following points below to help you do so.

Recognize and Educate			
0-6 Months	**7-12 Months**	**13+ Months**	
Rising Stars	**Stars**	**Super Novas**	**Novas**
1. Receptive to all aspects (products and services) of SA 2. Likely to be purchasing breakroom, light cleaning products 3. Receptive to placing orders for furniture and installation 4. Highest percentage of BO$$ spend	1. May be good candidates for qualification of BO$$ specialist engagement 2. Would value their Staples team continually understanding the changing needs of their more complex organization 3. Receptive to calls and communications from Staples	1. Feels aligned with the Staples brand, enjoys being a loyal customer 2. Brand advocate — may be willing to recommend Staples to colleagues 3. Receptive to calls and communications from Staples 4. Has a sense of trust in his/her Account Manager	1. Feels positive about Staples and their relationship with us 2. Not immune to advances from other companies 3. Likely to already be selectively purchasing BO$$

The customers that are a part of the high potential segment tend to be:

Blend of mid-sized and large accounts	**Receptive to all aspects of Staples Advantage**	**Likely good prospects for large spend**	**Need to be told that they are Staples' best**

Share with these customers: "You are among my best customers, I'd like to help you get even more value out of Staples Advantage!"

Good Potential Segments

The key for these accounts is to uncover good decision makers, however they may be harder to find. Leveraging the back door capture can help associates uncover all, as well as additional decision makers. We need to connect with these customers more frequently and enhance their Staples Advantage shopping experience. Please note the following points below to help do so.

Connect & Enhance		
0-6 Months	**7-12 Months**	**13+ Months**
Slow Starter	**Star Potential**	**Lapsing**
1. Needs continued assurance of their program to grow as customers 2. Need to be convinced of the value of buying BO$$ 3. May need a reminder to repurchase	1. May benefit from specials and offers to take advantage of those unique office needs 2. Demonstration of loyalty to Staples 3. Could be entertained by competitive offers as their smaller program could move quickly	1. Probably requires a compelling reason to order from Staples 2. May be indifferent to communications from us 3. Needs re-energizing, possibly from Account Manager contact 4. May be enticed by promotional offers

The customers that are a part of the good potential segment tend to be:

Blend of small and larger accounts	**Slowly declining spend**	**May be hard to change buying habits**	**Tend to have strong repurchase rate**
Share with these customers: “We appreciate you counting on us and I’d like to be sure we’re addressing all your business needs. “			

At Risk Segments

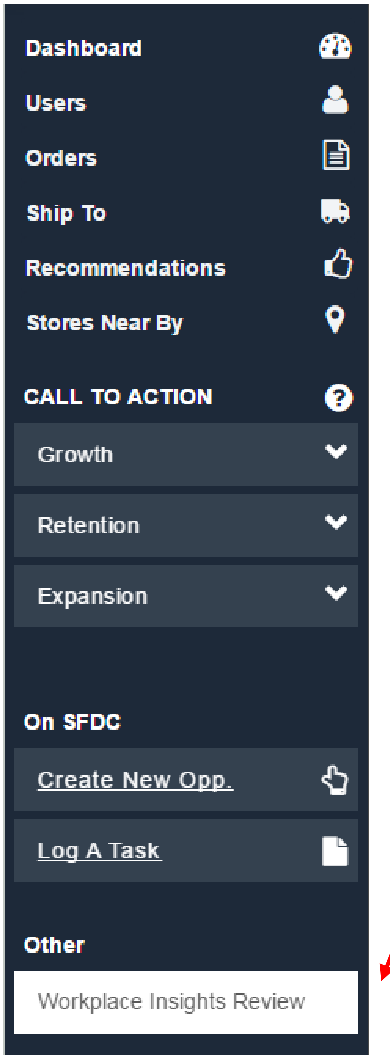
These accounts are typically hard to reach and are the ones that we are striving to retain. We need to optimize the spending potential of these accounts and strive to retain them as Staples Advantage customers. Please note the following points below to help do so.

Optimize & Retain		
0-6 Months	**7-12 Months**	**13+ Months**
Not Engaging	**Late Adopter**	**Defector**
1. May have lack of engagement with his/her Account Manager 2. May be unsure of Staples price and service 3. May need an incentive to repurchase 4. Needs to be convinced of the value of buying BO$$ from Staples	1. Likely ordering from other suppliers 2. May need a reminder to repurchase 3. Would benefit from BO$$ education 4. Not convinced of Staples value to their company	1. Requires a compelling reason to order from Staples 2. Needs to be convinced about the value of our BO$$ offering 3. Likely to be enticed by promotional offers 4. Likely to prefer low cost, value-based products

The customers that are a part of the low potential segment tend to be:

Relatively smaller accounts	May be price comparison shoppers	Buy in fewer BOSS categories	May need a reminder to purchase
Share with these customers: "If we're not the lowest priced on a particular item, check back because we're always at work to deliver the best overall value!"			

Lesson 13 – Workplace Insights Review



To access the Workplace Insights Review dashboard, use the left navigation bar. Workplace Insights Review is in the Other section, below the On SFDC options.

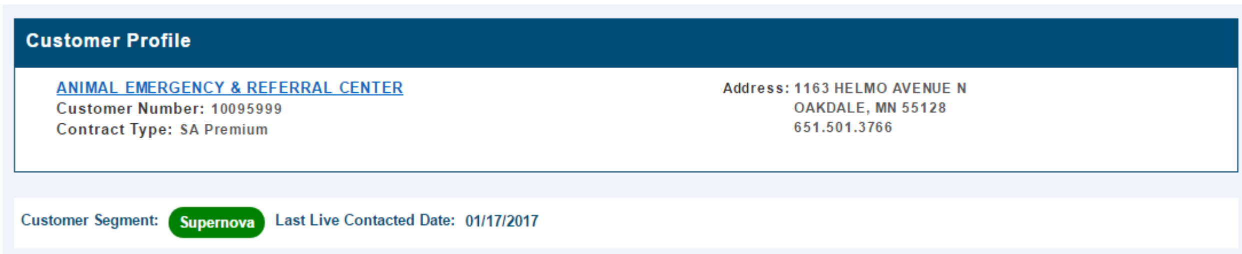
Workplace Insights Review is only available for Mature accounts. Young and Transitioning accounts will be suppressed.

Dashboard

Selecting Workplace Insights Review opens the new dashboard which consists of 4 different areas.

Customer Profile

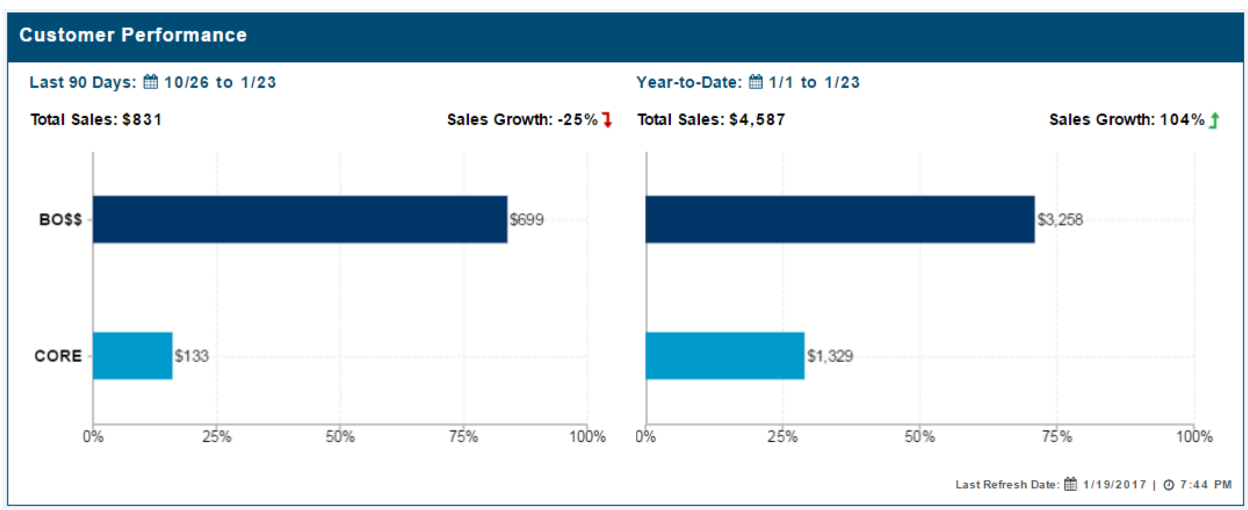
This is the same profile information displayed on the main dashboard. The Customer Profile section provides pertinent details about the customer including company name, customer number, address, Staples Business Advantage contract type, Premium Lifetime Savings (if applicable) and customer segment.



Customer Performance

Displays BO$$ and CORE results for the last 90 days and the year-to-date.

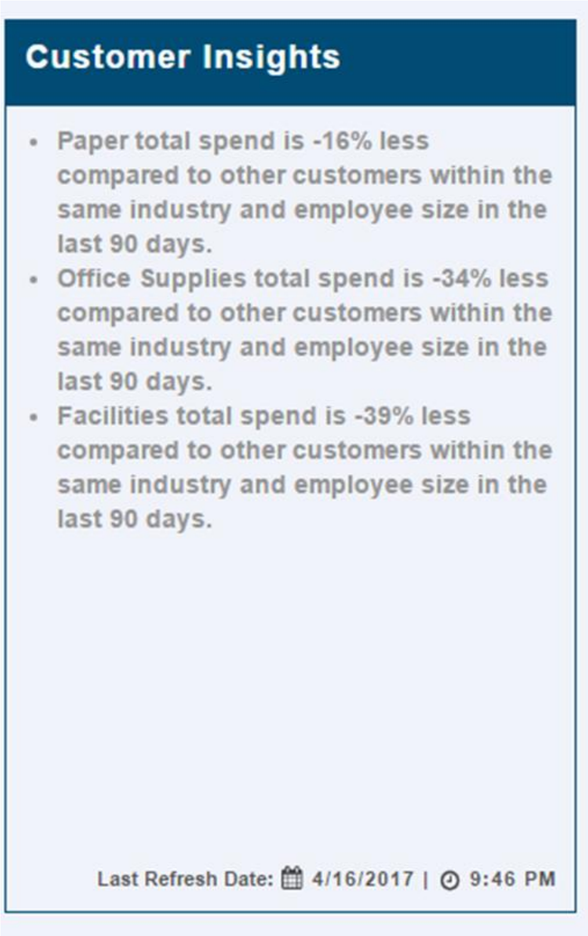
Note: Products that fall under the All Other Products category are included in Total Sales but do not fall within BO$$ or CORE. Summing sales for BO$$ and CORE, therefore, will not equal the Total Sales amount.



Customer Insights

This section highlights any year-over year sales decline for each category. The rate dynamically based on the factors such as industry vertical, company size, product category, etc.

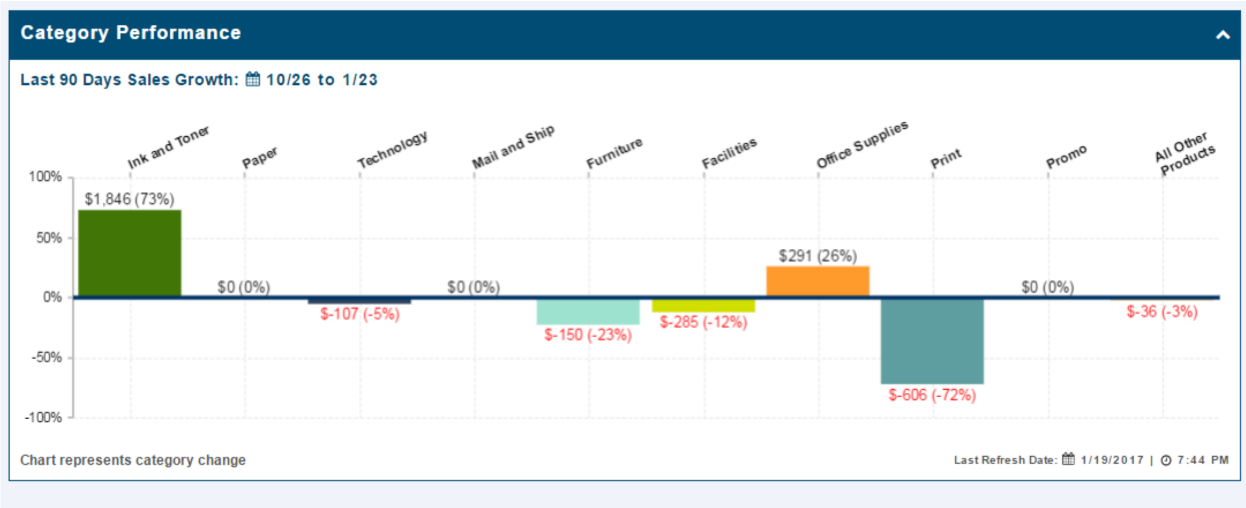
Note: If the customer does not qualify for any Insights, this area will not be displayed. If the customer qualifies for many Insights, a scroll bar is presented on the right side.

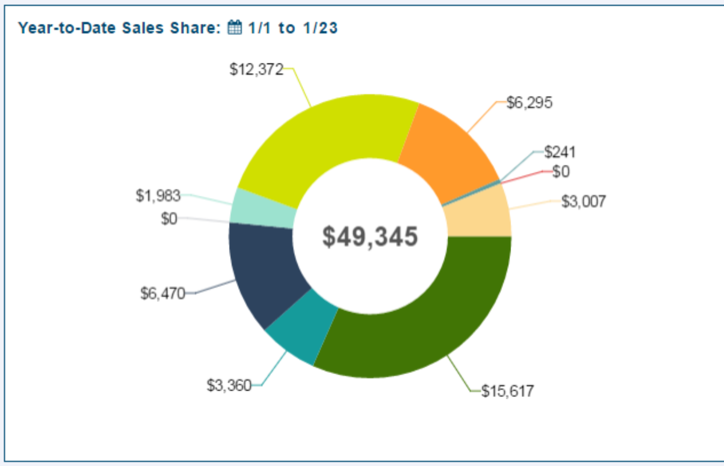


Category Performance

This area provides category details for the Last 90 Days and Year-to-date.

Note: The Last 90 Days chart displays how sales have changed for each category.



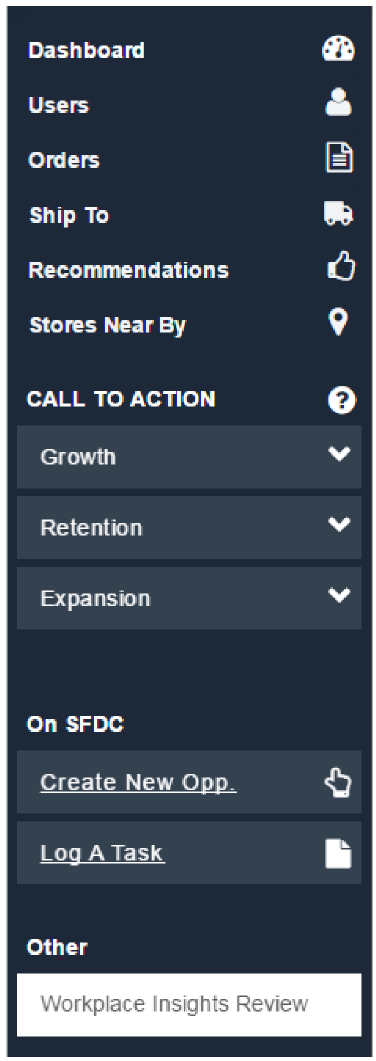


Category	Sales Share
Ink and Toner	32%
Paper	7%
Technology	13%
Mail and Ship	0%
Furniture	4%
Facilities	25%
Office Supplies	13%
Print	0%
Promo	0%
All Other Products	6%

Navigation

The Workplace Insights Review dashboard works similarly to the main Helios dashboard. When switching customers the screen is refreshed and the main dashboard displays for the new customer selected.

- Dashboard – screen refreshes with the main Helios dashboard
- Users, Orders, and Ship To - are each displayed above the Workplace Insights Review dashboard
- Ship To and Recommendations – refresh the screen for each of these areas
- Call to Action – Talking Points display in a window over Workplace Insights Review
- On SFCD – opens a SFDC session



Appendix – Lead Training Guide

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 converting customers 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.

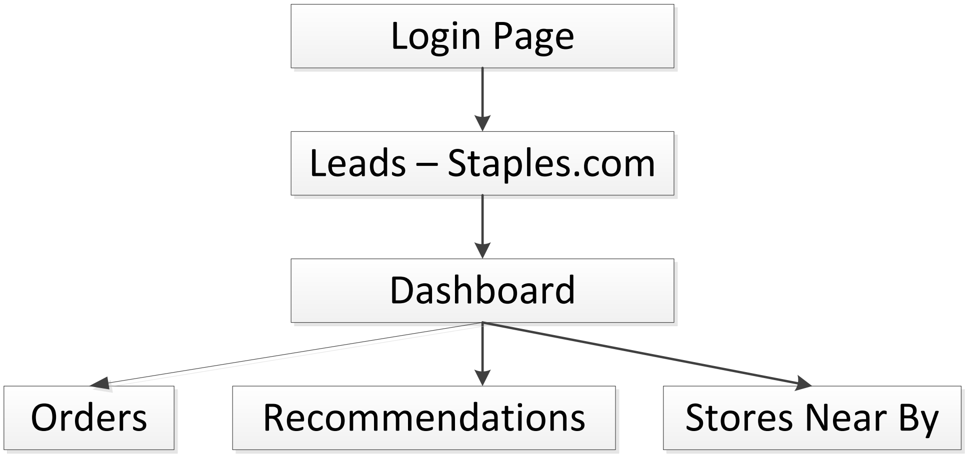
Leads – Staples.com – This page displays the associate's list of the Customers / Companies currently managed by Staples.com that are viable for SBA. Information includes the customer's associated Rewards customer number, tier, contact information, as well as other details.

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.

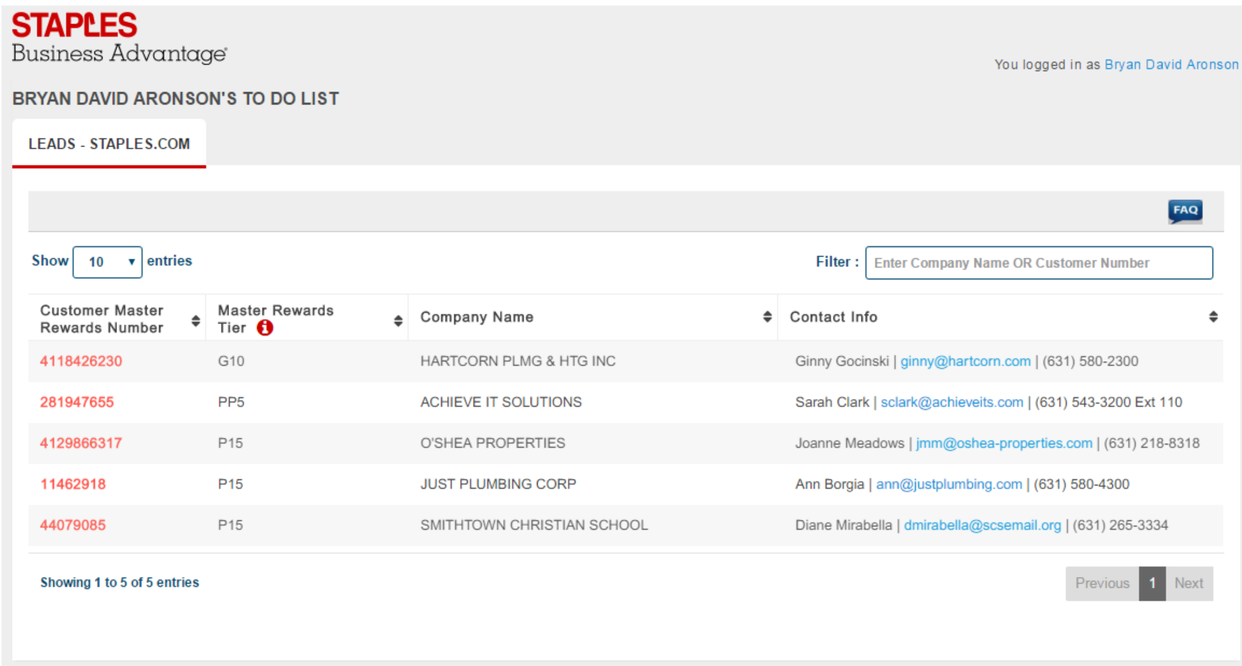


Lesson 2 – Login

See [Login Process](#)

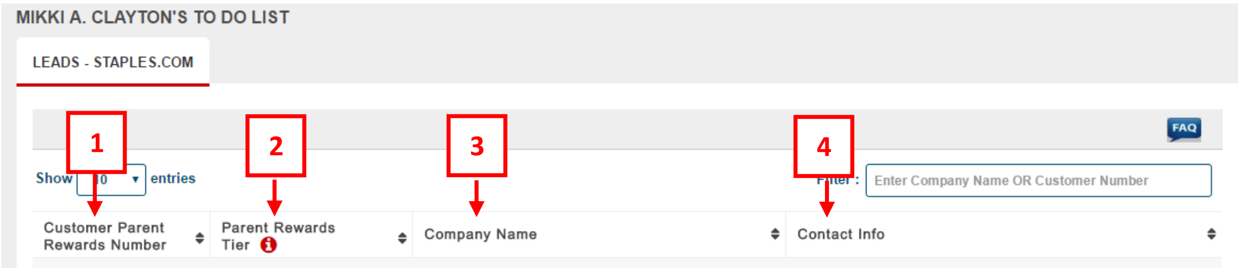
Lesson 3 – Leads - Staples.com

Leads – Staples.com displays a list of the Staples.com customers that qualify for SBA.



Customer Information

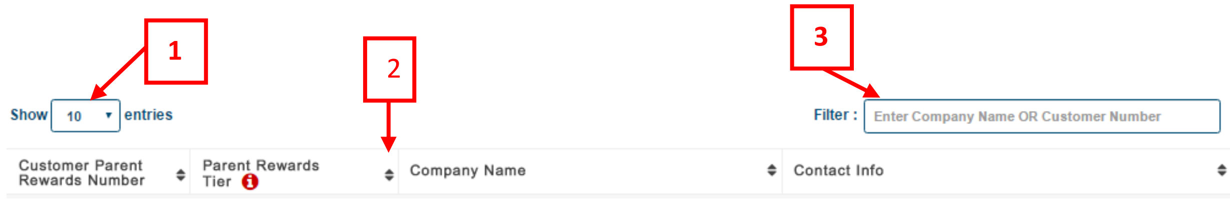
The **To Do List** provides important high level information about the account in call order priority.



#	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.

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.

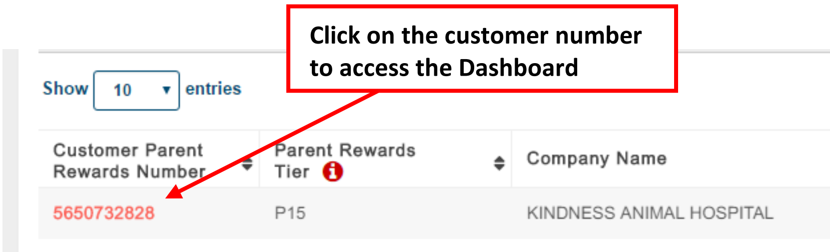


#	Category	Description
1	Show Entries	• The **Show Entries** drop-down, by default, shows 10 leads per page with the option to browse additional pages • The numbers of entries may be adjusted to 10, 25, 50, 100 or All entries per page by using the **Show Entries** drop-down
2	Sort	Click the sort icon 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

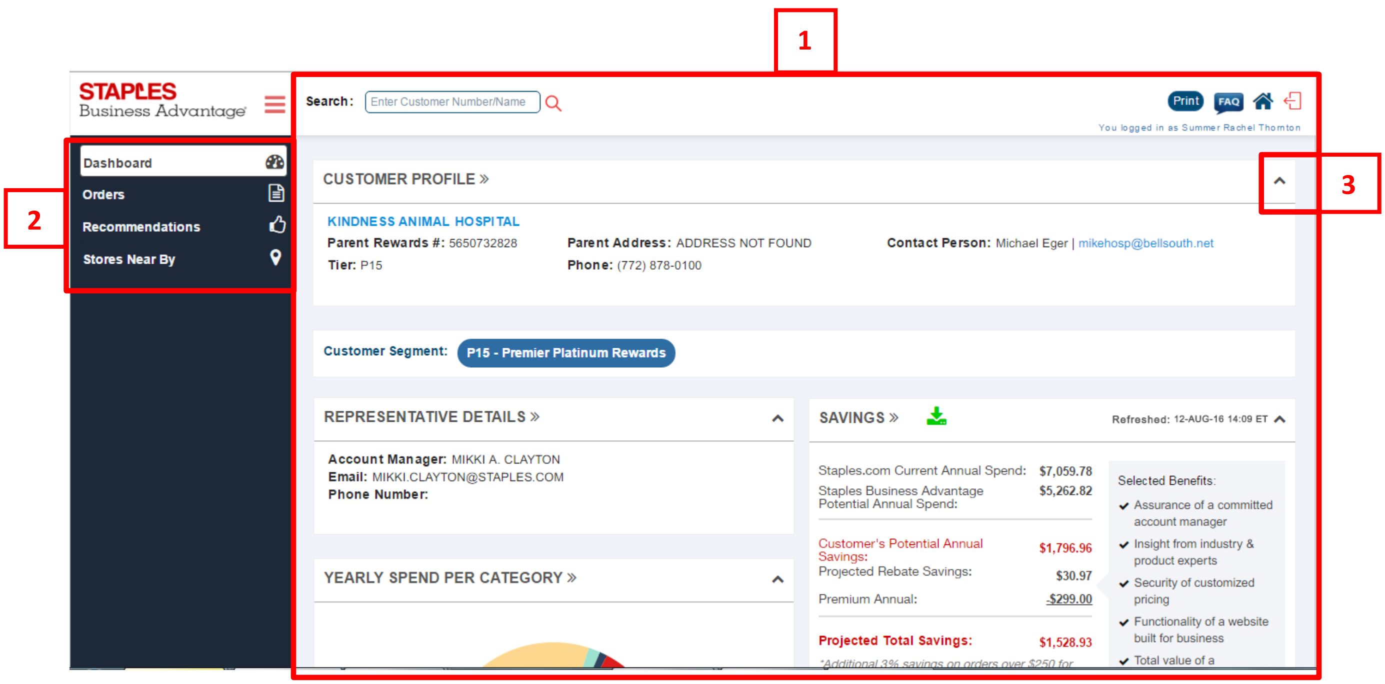
Accessing the Dashboard

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.

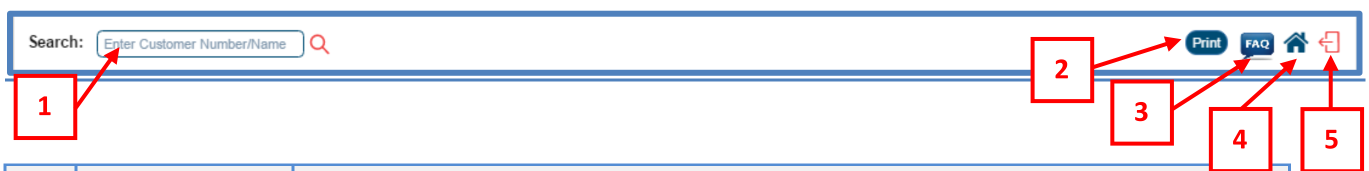


#	Category	Description
1	Dashboard Sections	The **Dashboard** contains the following sections on the main area which provide a 360 degree view of the account and purchasing history for the last 3 years: • Customer Profile • Representative Details

		• 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: ▪ "Orders Section" ▪ "Recommendations Section" ▪ "Stores Near By Section"
3	Collapse/ Expand Arrows	Each section provides an arrow to collapse or close the section

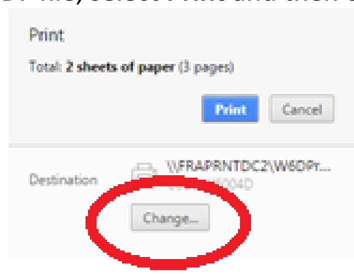
Dashboard Navigation

The Dashboard offers several ways for navigation, either by searching or returning to the **Leads – Staples.com** list.



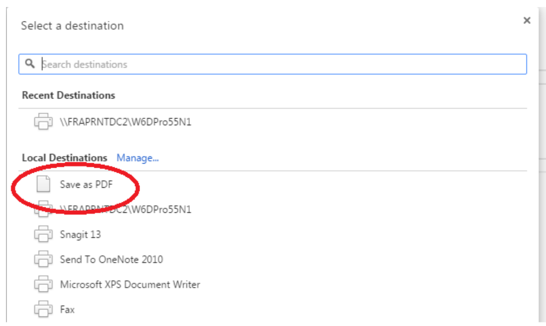
#	Category	Description
1	Search Box	• Accounts can be quickly located by leveraging the **Search** box, which is especially useful with large customer lists • The associate may search for existing customers via the **Search Box** using either a customer number or full customer name. Note: When using 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

<table>
<tr><td></td><td></td><td>
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.



</td></tr>
<tr><td>3</td><td>FAQ</td><td>This icon gives you access to Help, FAQ and Training information for the Helios Platform.</td></tr>
<tr><td>4</td><td>Home</td><td>This icon allows you to return to the Leads list from the Dashboard; click the To Do List/Home button located at the top right of the Dashboard screen.</td></tr>
<tr><td>5</td><td>Sliding Door</td><td>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.</td></tr>
</table>

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

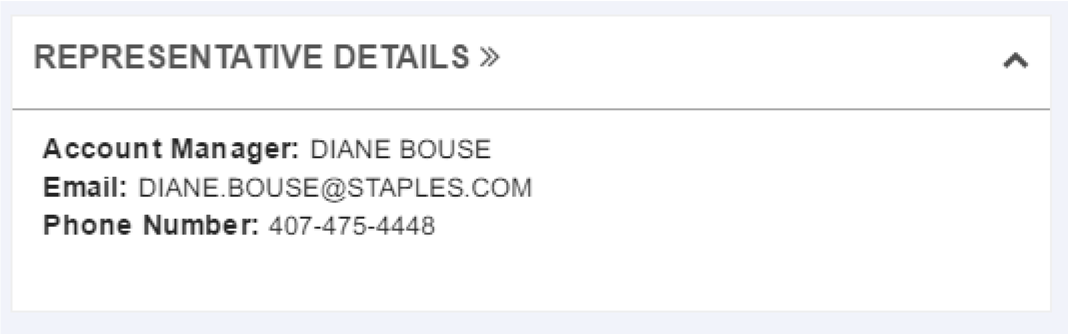
Customer Profile

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.

5. Clicking the hyperlink on the Company Name opens the Salesforce.com login page and the Account page.
6. 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.
7. 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. Master Customer Number – main Staples Rewards member number
    b. Sub Customer Number – the customer number associated with the Master
    c. Order Date – the day the transaction was placed
    d. Order Number – the unique identifier for the transaction
    e. SKU Number – product the customer purchased
    f. Quantity – the number of the purchased SKU
    g. Unit Price – the dollar amount per each SKU
    h. Product Description
    i. Channel – where the customer purchased the product; D= Staples.com, R = retail store
    j. Amount Spent – how much the customer actually paid for the product
    k. Program Price – what the customer would have paid if an SBA customer
    l. Projected Rebate – displays the appropriate amount if the product qualifies for a rebate
    m. 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		✔

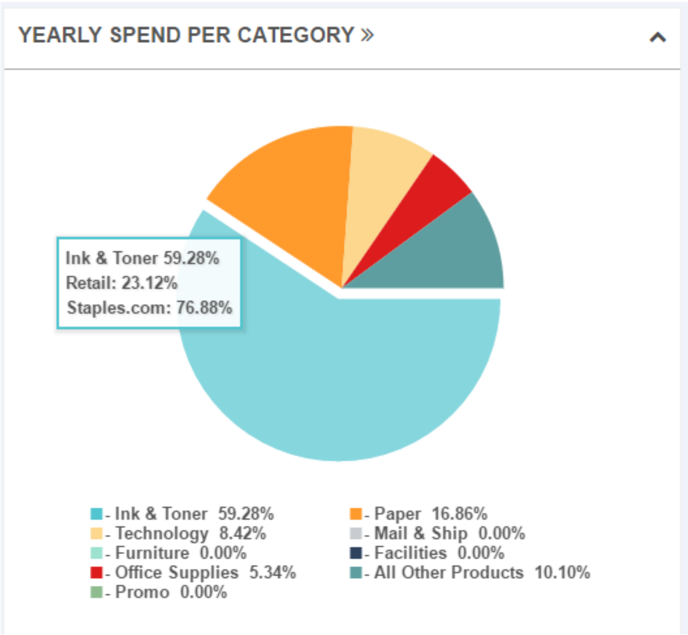
Yearly Spend Per Category

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.

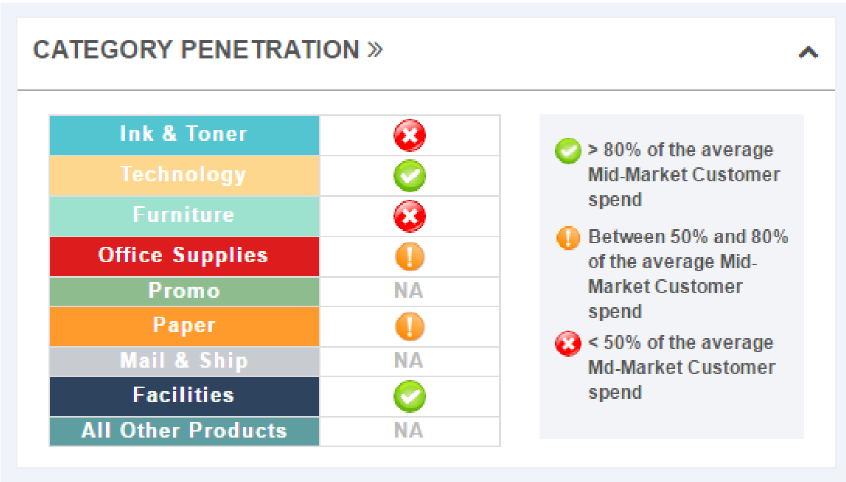
For example, this customer's purchases are 47.99% in Ink & Toner with 59.32% of Ink & Toner purchases via Retail and 40.68% via Staples.com.



Category Penetration

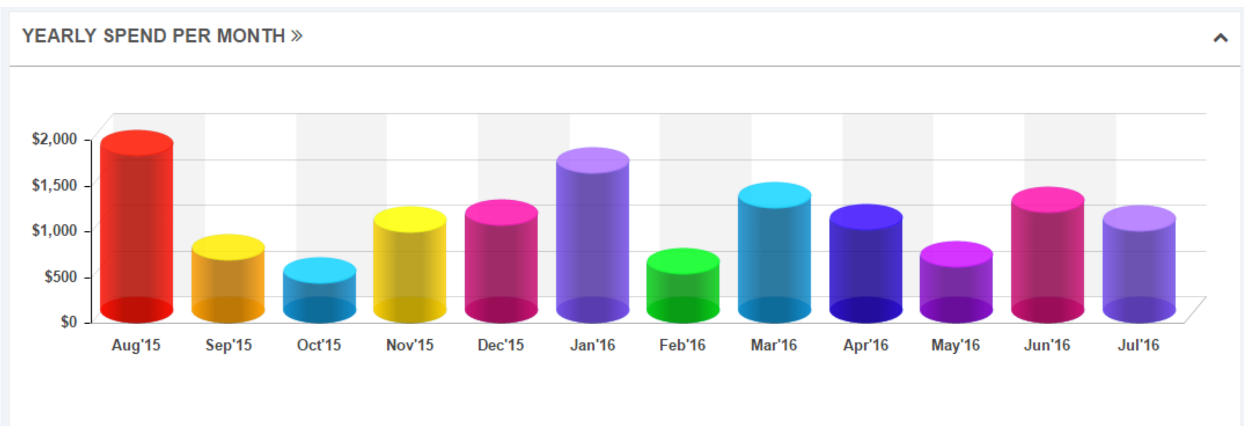
The **Category Penetration** section outlines how the customer's category buying pattern compares against the average Mid-market customer.

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.*



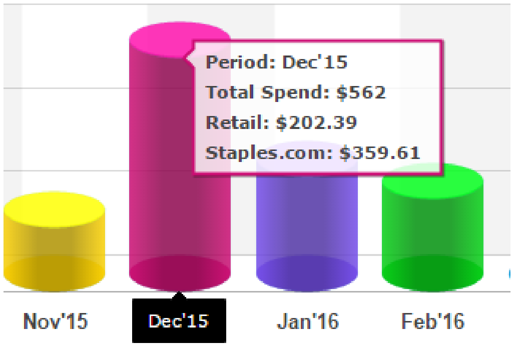
Yearly Spend Per Month

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 »

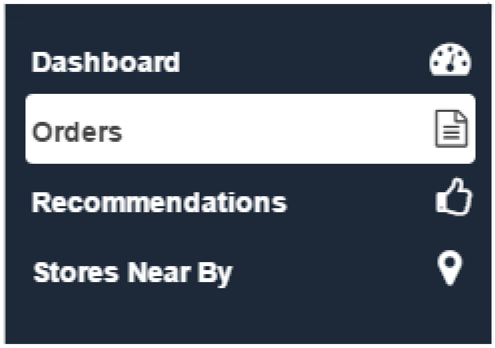
1

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

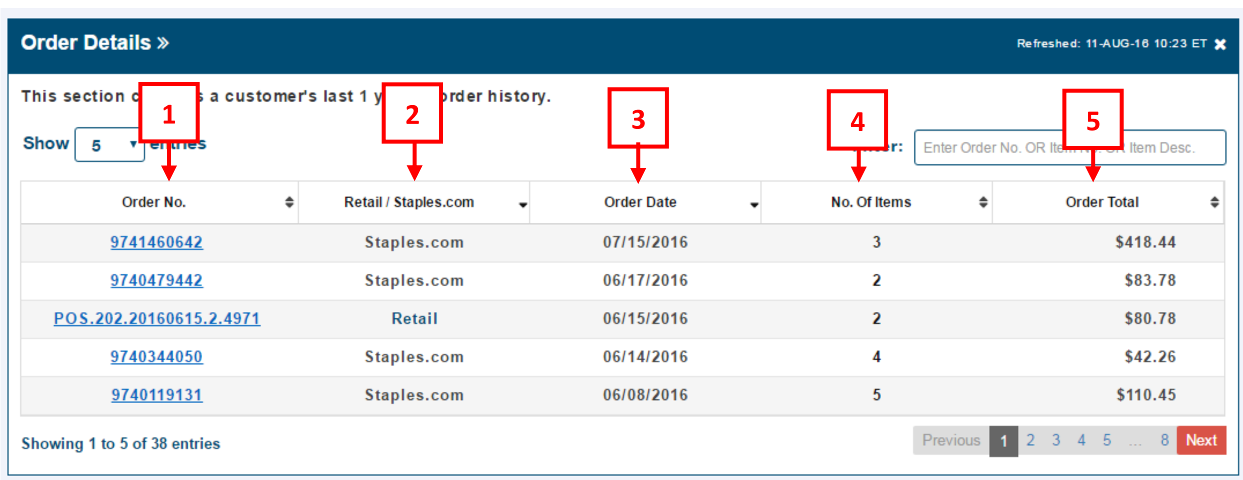
Lesson 6 - Orders Section



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.

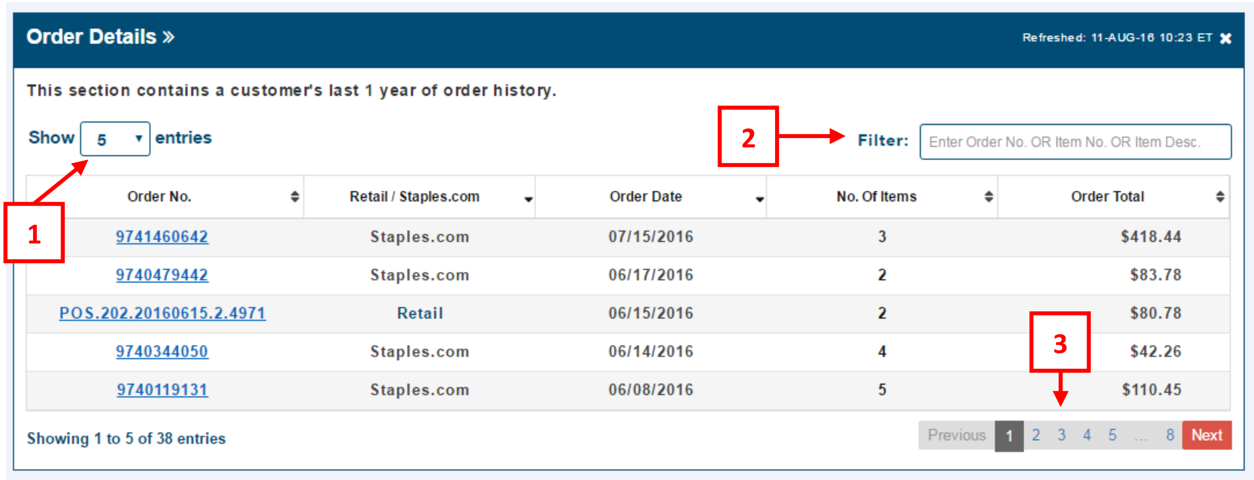


	Category	Description
1	Order No.	• The **Order Number** column provides the associated order number for orders placed on the account • Clicking on the **Order No**. hyperlink will access an **Order Details** pop up window that displays information pertaining to that order inclusive of: ○ Item Numbers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

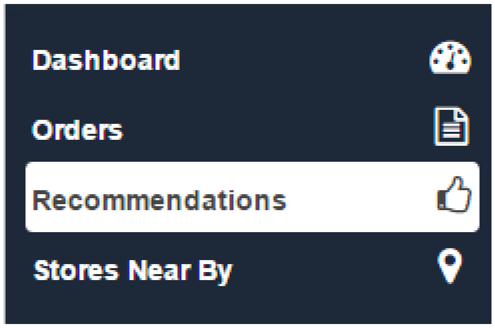
Orders Details – Filter Options

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

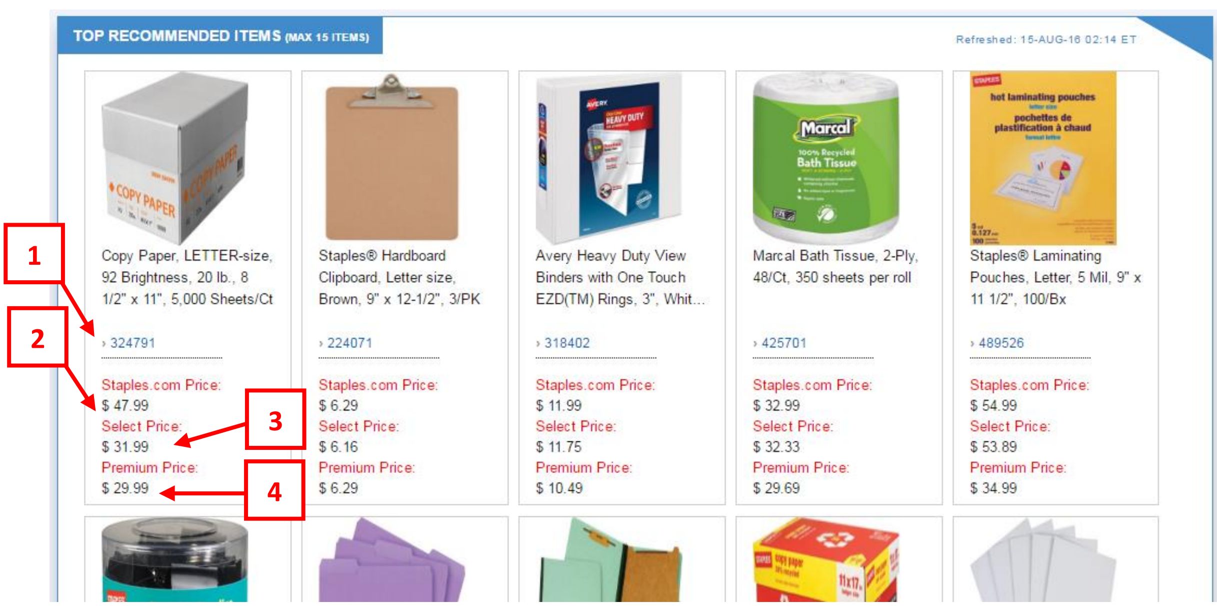


The **Recommendations** tab on the left side of the Dashboard allows access to the **Recommendations** section directly on the main **Dashboard** page.

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

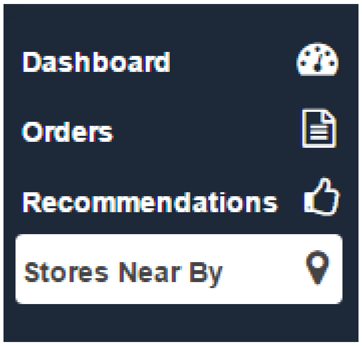
- The **Recommendations** refreshes the **Dashboard** to display the products. Click **Dashboard** to return to the full Dashboard display.
- Selecting Print at the top of the page provides a printout of the Customer Profile information followed by the top 15 recommendations.



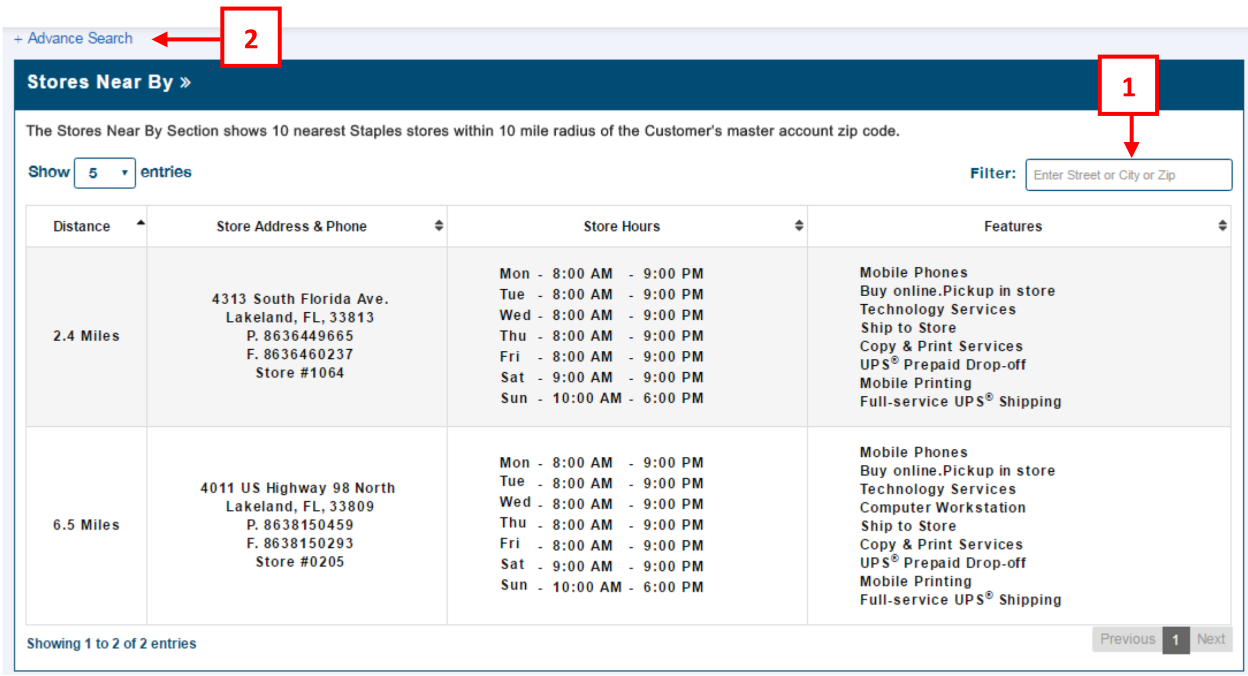
#	Category	Description
1	Item's SKU Number	Clicking on the item number will open the product page on StaplesAdvantage.com
2	Staples.com Price	**Staples.com Price** is the amount the customer will pay if they purchase via Staples.com
3	Select Price	**Select Price** is amount the customer will pay if enrolled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

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