App Updates 2025

Resources

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MENARDS®

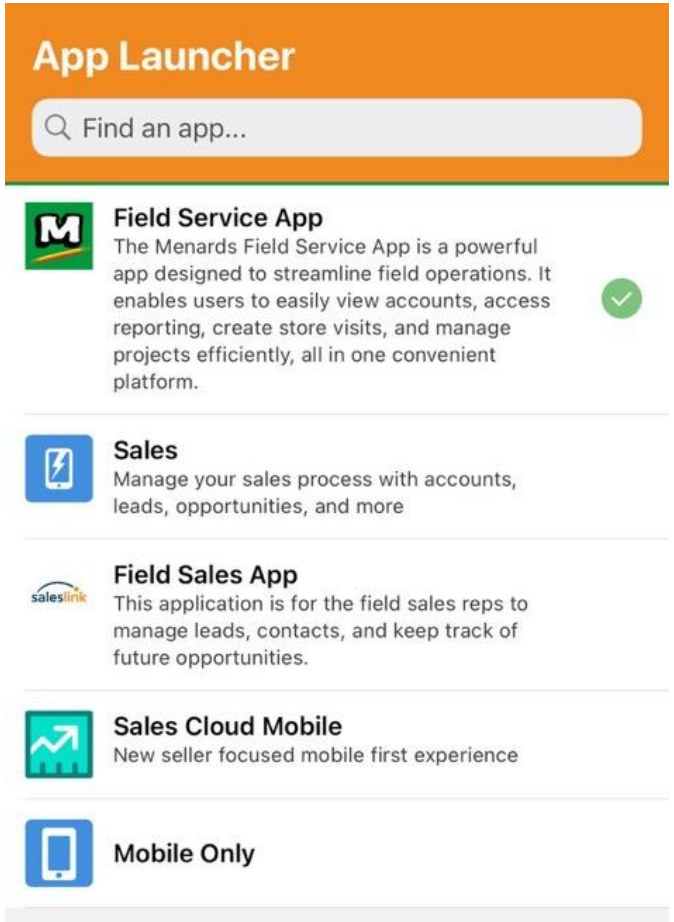
Step-by-Step Guide

Field Service App

We've created a Menards Field Service app specifically for the Menards team. This app allows us to build custom form layouts and gives hybrid reps the flexibility to switch between the Field Service app and the Field Sales app as needed.

Everyone should have access to this app by default. If you don't see it, follow these steps:

- Click the **tab button** at the top left of your screen
- Select **Menu**
- Then click on the first option: **App Launcher**
- Look for the **Field Service App** logo and click on it to open the app.



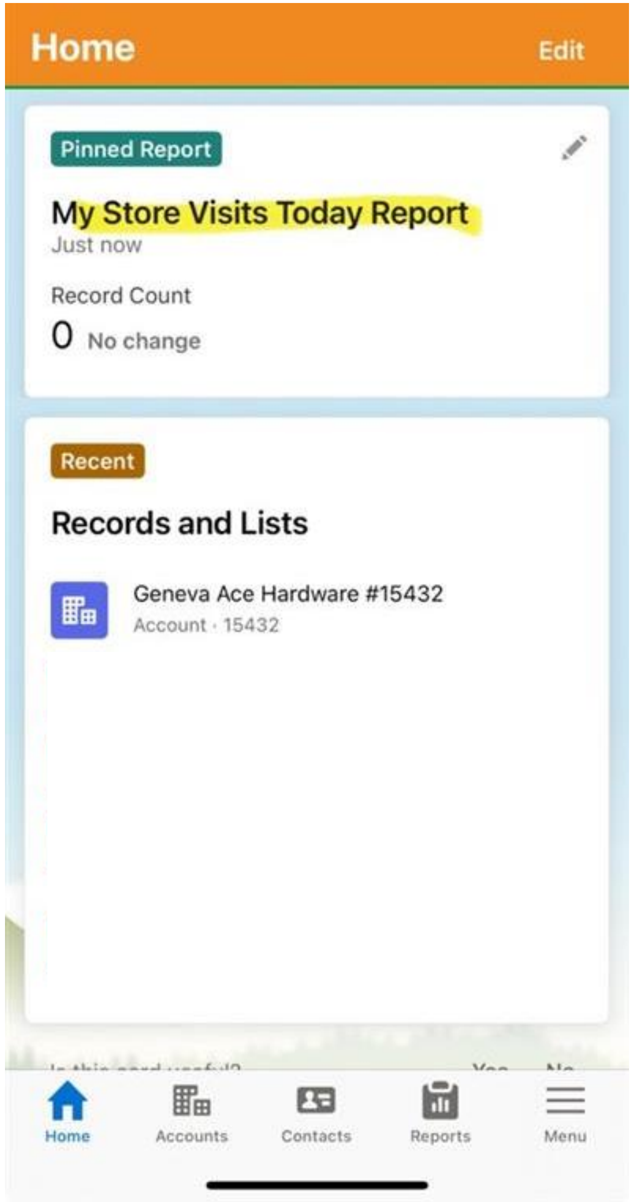
Store Visit Pin Report

The Salesforce Home page is customizable based on your preferences. We'll pin the **'My Store Visit Today Report'** so you can see the store visits you've completed right at the top of your Home page.

Follow these steps:

1. Click the **Edit** button in the top right corner of your Home page.
2. Select **Add Card**.
3. Choose **Pinned Report**.
4. In the search bar, type **My Store Visit Today**.
5. Select the report, then click **Save**.

The report is now pinned and will appear on your app's Home page



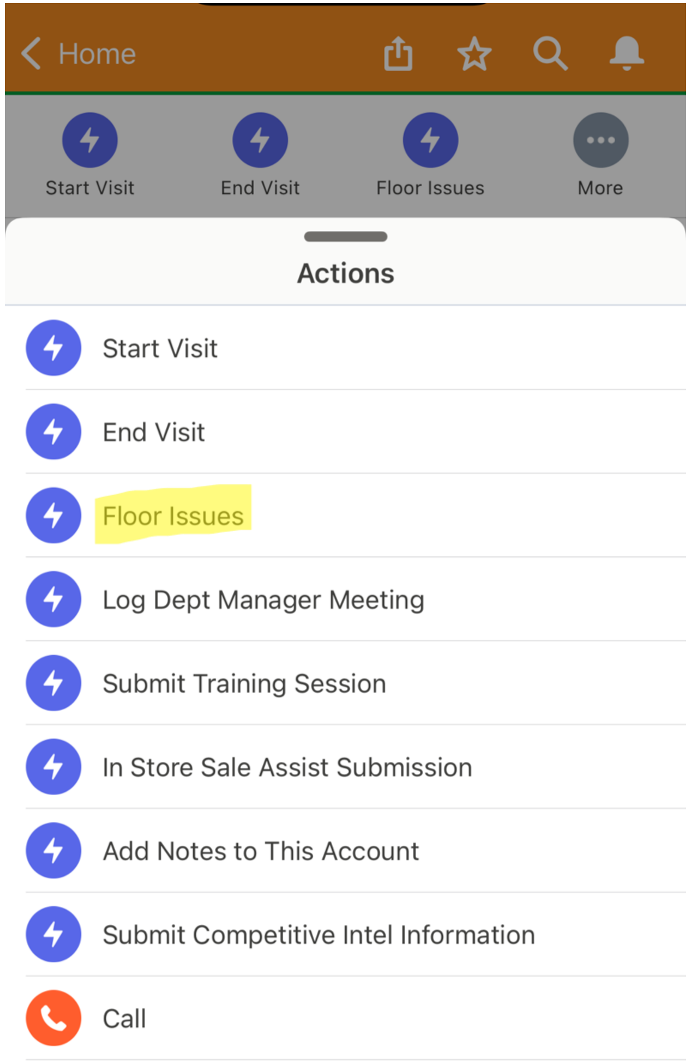
Starting My Store Visit And Floor Issues

Start Visit & Floor Issues

1. Select the Issue Type
   Choose the issue (e.g. Outage, Damaged Item). Only submit one issue at a time.
2. Enter Product Info
   Add the SKU or model number and any helpful comments.
3. Choose Action Taken
   Select how you handled the issue:
   - Completed – No Action Taken, Replaced/Fixed
   - Follow-Up Needed – Order, Store Orders, Vendor Direct, or Follow-Up Next Visit
4. If You Select "Order"
   - A task is sent to Sue Nelson to place the order.
   - Be sure to include full details and the store number in the "Attention To" field when ending the visit.
5. Task & Email Notification
   - Sue completes the task and marks it Completed.
   - You'll get an email confirmation once the order is placed.

Need Help? Scan the QR Code for a Quick How-To Guide

Demo



Home
Start Visit
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Log Dept Manager Meeting
Submit Training Session
In Store Sale Assist Submission
Add Notes to This Account
Submit Competitive Intel Information
Call

Logging Department Manager Meetings

Recording Dept Manager Meetings

1. Search for the Account
   Use the search bar to find the store. Click **"More"** under Related Quick Links.
2. Click "Log Dept. Manager Meeting"
   This will open a form to record your meeting.
3. Fill Out the Form
   - Select Department
   - Enter Manager's Name
   - Write a Short Summary (Max 255 characters)

     All fields are required.
4. Select the Vendor
   Choose one of the 4 listed vendors or select **"Other."**
   If you choose "Other," contact **Dan** to add that vendor to the list.
5. Submit the Meeting
   Click **Next** to complete and save the meeting as a touchpoint.

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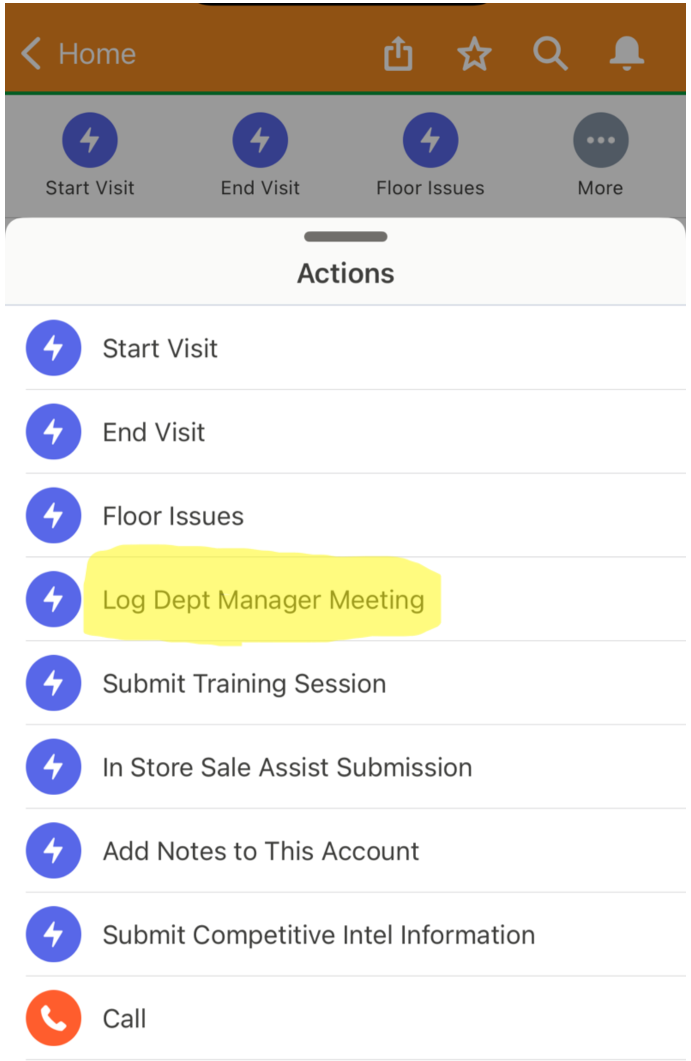
Demo



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Training Sessions

Submit A Training Session

1. **Search for the Account**
   Use the search bar and go to the store's page. Click **"More"** under Related Quick Links.
2. **Click "Submit Training Session"**
3. **Fill Out the Training Form:**
   - **Vendor** (e.g. Delta, Kraus, etc.)
   - **Training Category** (based on vendor)
   - **# of Associates Trained** (1–10)
   - **Type of Training** (New Product, Refresher, etc.)
   - **Who You Trained With**
   - **Training Summary** (Max 255 characters)
4. **Click "Next" to Submit**
   Your training is now recorded and stored as a touchpoint.

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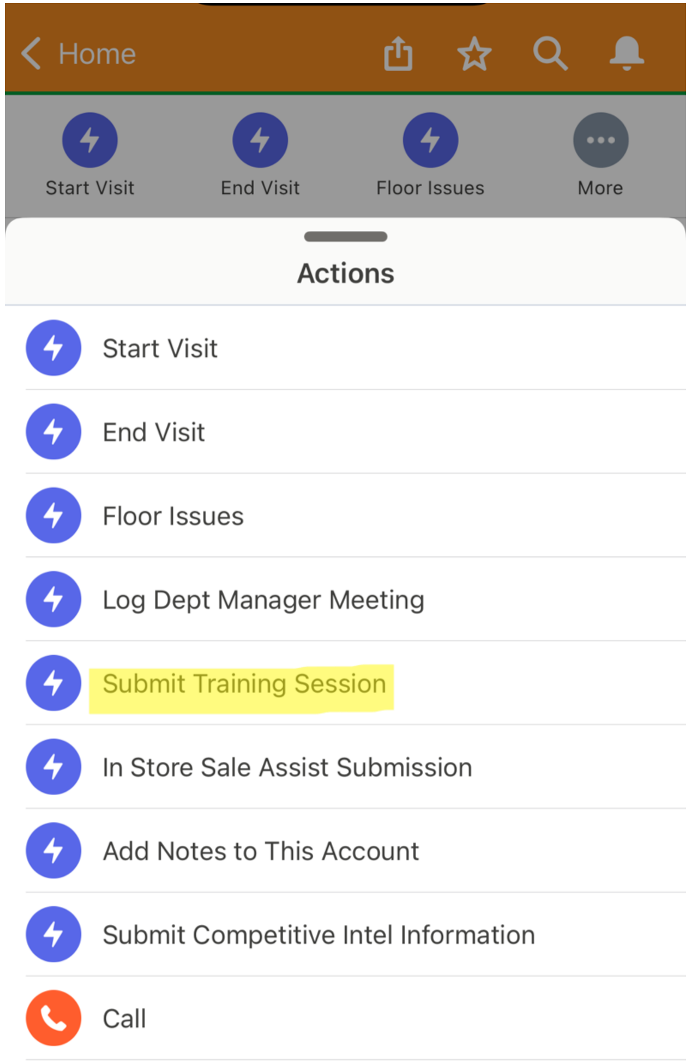
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In Store Sale Assist

Submit An Instore Sale Assist

1. **Find the Account**
   Search for the store and click **“More”** under Related Quick Links.
2. **Click “In-Store Sales Assist Submission”**
3. **Fill Out the Form:**
   - **Search for the SKU** of the item you helped with
   - **Enter Quantity** (defaults to 1, update if needed)
   - **Write a Short Description** of what you assisted with
4. **Click “Next”**
   Review your entry.
5. **Click “Finish”**
   Your Sales Assist is now logged and recorded.

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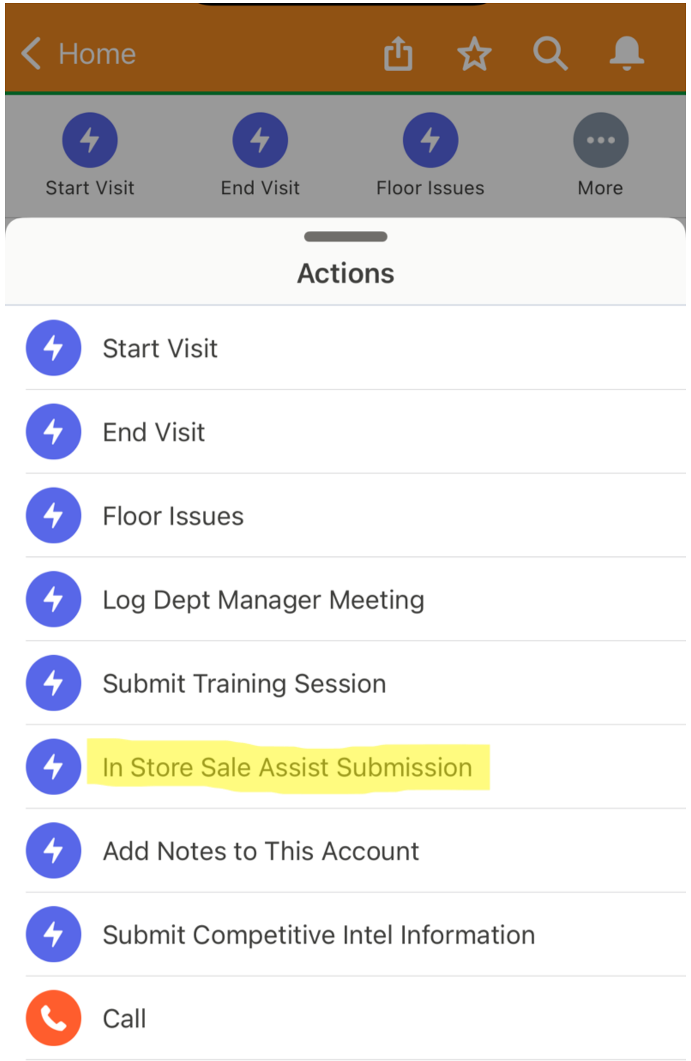
Demo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Store Visit Notes

Submit Store Notes

1. Find the Store Account
   Use the search bar and click **“More”** under Related Quick Links.
2. Click “Add a Note to this Account”
3. *Note: These are for personal use only and do not count as touchpoints.*
4. Write Your Note
   - Add a **Note Title**
   - Type your **comments or observations**
5. Click “Next” to Save
6. To View or Edit Your Notes:
   - Go to **Related Quick Links**
   - Click **“Notes & Attachments”**
   - Select your note, then click **“Edit”** to update

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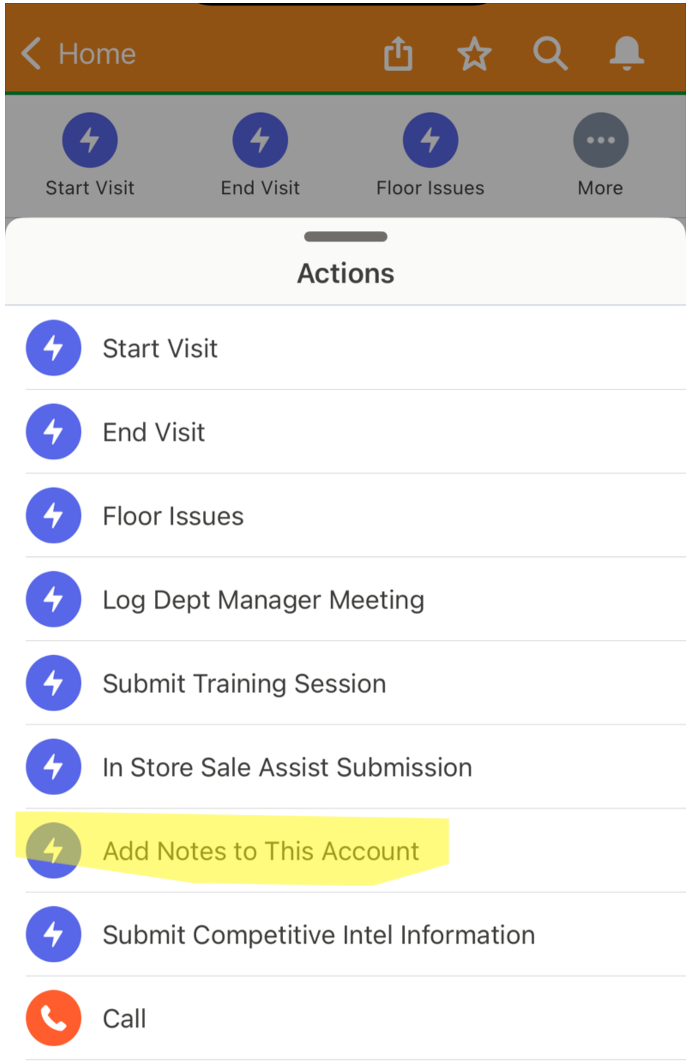
Demo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Share Competitive Intel

Submit An Instore Sale Assist

1. Find the Store Account
   Search for the account and click **“More”** under Related Quick Links.
2. Click “Submit Competitive Intel Information”
3. Fill Out the Intel Form:
   - **Manufacturer** the intel is related to
   - **Competitor** involved
   - **Source** of the intel
   - **Reason** the intel matters
   - **Date** it occurred (estimated)
   - **Comments** for extra context (if needed)
4. Click “Next” to Submit
   Dan will receive an email with your submission and follow up if needed.

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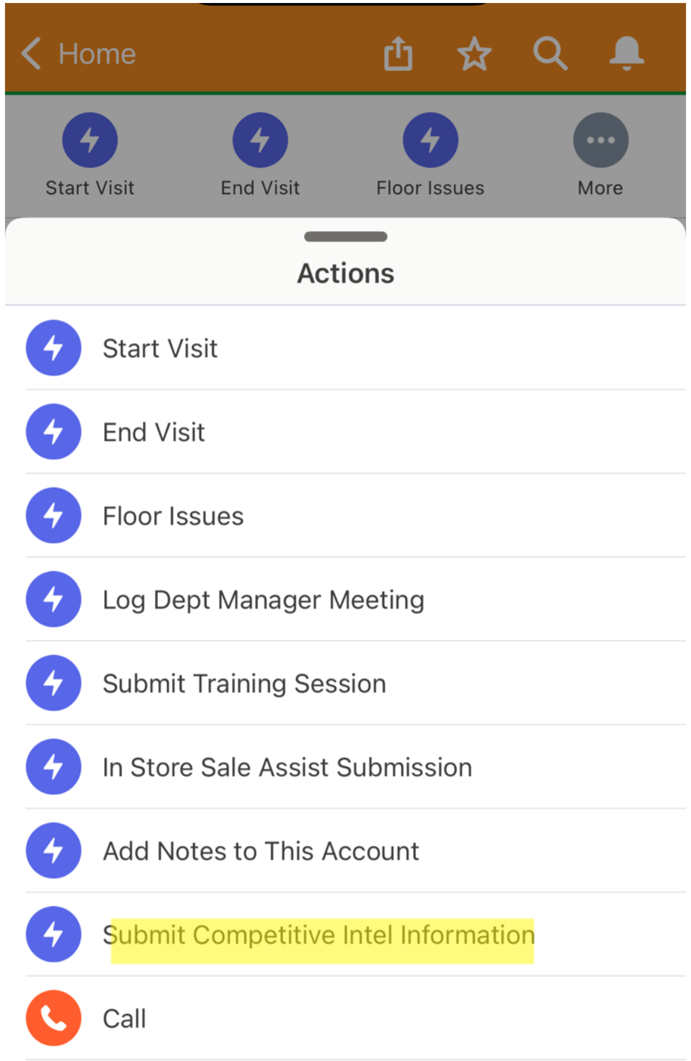

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Reports & Dashboards

Dashboards

The dashboard summarizes key activities and performance metrics related to store visits and sales efforts for your Menards Stores. It provides insights into your engagement, task completion, and sales performance, helping drive accountability and identify follow-up needs.

Key Sections Covered:

- **Store Visit Activity**: Total visits, store issues, outages, trainings, department manager meetings, and sales assists completed.
- **Follow-Up Tracking**: Highlights open issues and outage details that require further action.
- **Sales Performance**: Displays sales by manufacturer, sales volume by store, and year-over-year growth in both % and dollars.
- **Intel Sharing**: Tracks how many competitive insights have been submitted to the team.
- **Quick Access Reports**: Includes links to detailed sales data by item and location for each manufacturer.

Thank You!