FIELD SERVICE REPRESENTATIVE USER GUIDE FOR NATURAL INSIGHT
Updated March 2015

<table>
<thead>
<tr>
<th>TABLE OF CONTENTS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SIGNING INTO NATURAL INSIGHT WEBSITE</td>
<td>PAGES 3-4</td>
</tr>
<tr>
<td>NAVIGATING HOME PAGE</td>
<td>PAGES 4-8</td>
</tr>
<tr>
<td>PROFILE POD</td>
<td>PAGE 5</td>
</tr>
<tr>
<td>WORK POD</td>
<td>PAGES 6-7</td>
</tr>
<tr>
<td>FLEX CALLS</td>
<td>PAGE 7</td>
</tr>
<tr>
<td>MESSAGES</td>
<td>PAGES 7</td>
</tr>
<tr>
<td>OPPORTUNITIES POD</td>
<td>PAGES 8-9</td>
</tr>
<tr>
<td>RESCHEDULING A SERVICE CALL</td>
<td>PAGES 9-10</td>
</tr>
<tr>
<td>COMPLETING A SURVEY</td>
<td>PAGES 10-11</td>
</tr>
<tr>
<td>SIGNING OUT OF NATURAL INSIGHT WEBSITE</td>
<td>PAGE 11</td>
</tr>
<tr>
<td>FREQUENCY ASKED QUESTIONS (FAQ)</td>
<td>PAGE 12</td>
</tr>
</tbody>
</table>
Signing into Natural Insight Website

- Go to https://my.naturalinsight.com.

- Enter the username and password provided to you via email after LMS received your New Hire Paperwork.
- The first time you login you will be required to walk through an acknowledgement created by Natural Insight.
Tips:

Passwords are case sensitive, which means that “MaryContrary96” and “marycontrary96” are not treated the same.

If you received an e-mail with your sign-in information, try copying the information from the e-mail and pasting it into the Sign-in screen.

Navigating Home Page

At the top right hand side of your Home page you have the options for Home, Resources, Profile, Help, and Sign Off as seen below. You also have the option to click on “See how this page works” to view an 11 minute Video on how to navigate Natural Insight.

- You can click on the Home option to return to the Home page.
- The Resources option will provide you important links to project documents, employment documents, web site links, and training videos.
- The Profile option will lead you to your profile and allow you to add a profile picture and change your password.
- The Help option may answer your questions if are having trouble navigating through Natural Insight.
- The Sign Off option will sign you out of your Natural Insight session.

The Home page is made up of several areas that will provide information vital to your work.
1. **Profile Pod**

You can personalize Natural Insight by uploading a picture of yourself. When you click on the photo area you will be taken to the Staff Edit screen where you can upload or edit your photo.

Click on the calendar icon to view a calendar display of all your work with links to enter the data for the project, view Project Materials or reschedule the project. You can view the calls scheduled to you for the day, the week, or the entire month.

Click the Opportunities button to view a list of potential jobs for you. There is also a separate Opportunities Pod where you can view all the opportunities available to you. You can see the number of opportunities in the small box attached to the Opportunities button. Because these are opportunities you can either Accept the call or Decline the call.

2. **Work Pod**

In this section you can see all the calls that are scheduled for the current week. You can click on to view additional calls scheduled.
Note: Most projects will be scheduled to you at 8AM on the start date of the project. You are responsible for rescheduling each a call assigned to you for the date and time that you intend to complete the call. This is done by clicking on the Reschedule button described below.

<table>
<thead>
<tr>
<th>Schedule</th>
<th>Project</th>
<th>Enter Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday, August 15</td>
<td>5478 - Target/D215 Jewelry/August wk2 visit 2 (2594557)</td>
<td></td>
</tr>
<tr>
<td>Monday, August 16</td>
<td>5485 - Target/D90 Sunglasses/August wk3 visit 1 (2598743)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5489 - Target/D90 Sunglasses/August wk3 visit 1 (2601557)</td>
<td></td>
</tr>
<tr>
<td>8:00 AM - 9:55 AM</td>
<td>5483 - Target/D215 Jewelry/August wk3 visit 1 (2598744)</td>
<td></td>
</tr>
<tr>
<td>8:00 AM - 9:55 AM</td>
<td>5488 - Target/D215 Jewelry/August wk3 visit 2 (2598843)</td>
<td></td>
</tr>
</tbody>
</table>

You can click on the Project Name/hyperlink to see the details of the listed project. This will take you a pop up window which includes links to the project materials, project descriptions, entering the data for the project, and rescheduling the project. By clicking on More... you will be taken to the Call to Complete page shown below.
3. **Flex Calls**
The Flex Calls section will display for you the Rep Phone/Email/Other Time Reporting call. If you make a phone call/email to our office that you cannot attribute to a project, such as a request for time off, question about payroll, etc., you should report your time on a phone/email flex call that is scheduled to you in Natural Insight. You will be paid $10.00 per hour for these types of calls. Other calls similar to this may display in this section as well and you will be notified about when to use these calls.

4. **Messages**
The Messages section will provide companywide updates on projects.

5. **Opportunities Pod**

Accepting/Declining an Opportunity
If you have an opportunity deployed on Natural Insight, you should follow the steps below to accept or decline the Opportunity. Please review the outline below summarizing the opportunity scheduling process that LMS typically follows. **If you do not see an Opportunity when you log into Natural Insight, it has been accepted by another Service Representative and is no longer available.**

**Opportunity Scheduling Process**

1. All opportunities will be sent at the same time every day. We encourage reps to login to Natural Insight (NI) **every day at 4pm Central Time** to view any new opportunities that may have been sent.

2. All Project Work (**Including Target Project Work**):
   - **Target Project Work:** Opportunities sent to default representatives
     - Remaining open calls - opportunities sent to representatives within 50 miles
   - **Non Target Project Work:** Opportunities sent to representatives within 50 miles

3. Continuity Work and Projects with Multiple Cycles (**Excluding Jewelry and Sunglasses**):
   - **Day 1**
     - Opportunities sent to default representatives
     - Remaining open calls - opportunities sent to representatives with previous experience within 50 miles
   - **Day 2**
     - Opportunities sent to all representatives with experience within 50 miles
   - **Day 3**
     - Schedule to default representatives. If no default rep, scheduled to rep that did the last service/cycle.
     - Operations – Work remaining open calls

**To accept or decline an Opportunity:**

1. Log onto Natural Insight. Click on the Opportunities button within the Profile Pod or click on the project name in the Opportunities Pod.
2. Click either Accept/Schedule or Decline for each opportunity.

Rescheduling a Service Call

Most projects will be scheduled to you at 8AM on the start date of the project. You are responsible for rescheduling each a call assigned to you for the date and time that you intend to complete the call.

1. Once logged in to Natural Insight, identify the call that you wish to reschedule from your homepage by either clicking on the call in the My Calls this Week section, or by entering into the View Call Calendar.

2. Click on the call you need to reschedule and then click on the Reschedule button.
3. You will be promoted to enter a new date and time you plan to complete the call. One you have entered the date and time that you will performing the service click on the Schedule button and your call will be rescheduled.

Completing a Survey

Upon completing a visit you will need to log into Natural Insight and complete a survey about the visit. On the left side of the screen you will see your visits for the week. Please locate call that corresponds with your completed visit. When you find the correct call click on the white clipboard.
Click on the white clipboard to enter survey data.

Clicking on the icon will bring you into the survey. Once in the survey you will be prompted to answer the first question. When you have answered the question accordingly click the “continue” button at the bottom of the page. Continue with this process until you have completed all required questions and you arrive at the “Survey Response Review” page. Here you will be able to check your answers and have an opportunity to go back and change any information. Once you have verified that all of your data is correct click on the “Submit Survey” button at the bottom of the page.

After your survey has been submitted you will be brought to the “Survey Close” page which will provide you with a confirmation number to verify that you completed the survey. Once you have copied down your confirmation number click on the “Continue” button and you will be brought back to your Home page.

**Signing Out of Natural Insight Website**

- Click on the “Sign Off” button on the top toolbar.
• A “Goodbye” Message will appear.
• You can click on the “Sign in” button if you wish to sign in again.

For questions regarding your schedule, concerns with calls assigned to you, calls that are missing, or any payroll related questions please contact Lawrence Merchandising at 800-328-3967.

For issues navigating or operating the Natural Insight site, please contact Natural Insight at 800-961-5203 (hours are Monday-Friday from 8:00AM-5:00PM Eastern Standard Time), or visit www.naturalinsight.com and click on the Support tab where you will be able to get answers to questions or submit an issue via email.

NATURAL INSIGHT FREQUENTLY ASKED QUESTIONS (FAQ’s)

1. **Question:** Why do I have to log into Natural Insight and provide a scheduled service date in advance of the project?
   **Answer:** Providing LMS with a scheduled service date in advance means that we will no longer contact you with reminders that a due date for a project is approaching. This will also allow us to have a faster reaction time to stores that may not have been serviced yet. This scheduling feature will also help to keep you organized and aide you in planning out your week.

2. **Question:** What do I do if I am able to complete a service earlier in the week than I had initially planned?
   **Answer:** You can always complete a service earlier in the week than scheduled without having to contact your FSC (NOTE: You can do this as long as you are still servicing within the project window for the call). You will not have to reschedule the call in order to report it. You will need to reschedule if you had a service scheduled for a specific date and need to service it later than scheduled. The best thing to do is when you report your last service for the current week, go in and schedule your services for the
following week. Please remember, if you are unable to reschedule it yourself you must contact your the LMS office for assistance and approval for a new service date.

3. **Question:** What do I do if I cannot complete a service the day I planned to complete it?
   **Answer:** You will need to reschedule your service and contact the LMS office via email immediately to inform us of this change if the service is past-due. In your email you should include the following information: First and Last Name, Retailer (store name and number), Project Name, New Planned Service Date/Time. We will be unable to change your scheduled date without this information and the service will be counted as late. If the new date you provide is outside the service window for the project please include a reason as to why the service needs to be completed late.

4. **Question:** How do I know how much I am being paid for a service?
   **Answer:** Log into Natural Insight. From your home page click on the individual call you would like to check the pay on. Click on View Project Description. This will tell you the pay for that call.

5. **Question:** How do I know which calls I’m being paid for on my paycheck?
   **Answer:** Log into Natural Insight. On the left hand side of the page click on Reporting and then click on LMS Reports. On the next page click on Rep Earnings Report. Next to Timekeeping Period use the drop down arrow to select the pay period you want to review. Click on Run Report. The report results will be displayed below. It will show you each service you were paid for during that pay period along with hours reported and pay amount per project. In addition, LMS emails you a Wage Statement on each paydate that will provide this detail to you as well.