

# mySalesChain® Platinum User Manual

Revision 3.0

[www.SalesChain.com](http://www.SalesChain.com)

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# Version History & Disclaimer

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# About SalesChain

SalesChain is a software and services company founded in 2002. We are proud to serve office technology resellers and manufacturers by providing purpose-built cloud-based technology solutions that provide business workflow automation. Our company is based in Waterbury, Connecticut with our primary data center housed at Cyrus One Wappingers Falls, New York.

In the beginning, our focus was to empower sales teams with information, organization, and automation with a specific focus on managing lease portfolio turns. We have expanded our value proposition to include support for the entire enterprise, including proposal pricing, documentation, order fulfillment workflow, service pricing, commissions, delivery workflow automation, and document management.

Along with our expanded functionality, we've developed integrations to some of the industry's most respected companies, including a bi-directional integration to e-Automate, the BTA channel's ERP system of choice.

We are proud to support dealers across North America, with dealers in 46 states and 3 Canadian provinces. The most telling fact about SalesChain, is that many of our customers, like the Gordon Flesch Company, have been with us for over 14 years!

**Learn More at [www.SalesChain.com/about](http://www.SalesChain.com/about)**

# Support

Would you rather speak to a person or get email support?

**Contact our manned help desk using the information below:**

Support@SalesChain.com

(203) 262-1611

[www.SalesChain.com/support](http://www.SalesChain.com/support)

Hours: 9am-5pm EST Monday-Friday



1

# SalesChain Basics:

Basic navigation, login  
instructions, and customization of  
user preferences



**Logging into the SalesChain system should feel familiar for any digital native!**

To log into SalesChain:

1. Navigate to [www.mysaleschain.com](http://www.mysaleschain.com)
2. Enter your email address, company ID and user ID
3. Optional: Check the *Remember me* box if you are on a trusted computer
4. Click *Sign In*

[View a tutorial video here](#)

**Quick Tips:**

- If you're logging in for the first time, the system will prompt you to change your password for future log ins.
- We support Google Chrome, Mozilla Firefox, Microsoft Edge, Internet Explorer and Safari internet browsers

The screenshot shows the mySalesChain login interface. A red box labeled '1' encompasses the entire login form area. A red box labeled '2' highlights the input fields for 'Company ID', 'User ID', and 'Password'. A red box labeled '3' highlights the 'Sign in' button. A red box labeled '4' highlights the 'Remember me' checkbox and the 'Forgot your password?' link.

## How to: Reset a Forgotten Password

It is possible to reset your SalesChain account password if you lost or have forgotten it.

To reset a forgotten password:

1. Navigate to [www.mysaleschain.com](http://www.mysaleschain.com)
2. Click on *Forgot your password?* On the login screen:
3. Enter your company ID, user ID and email address
4. Click *Send Reminder*
5. Password change instructions will be emailed to you. *Note: If you don't see this email, be sure to check your junk or spam folder!*

[View a tutorial video here](#)

The diagram illustrates the process of resetting a forgotten password on the mySalesChain login page. It consists of two screenshots of the login interface, connected by a red line indicating a transition.

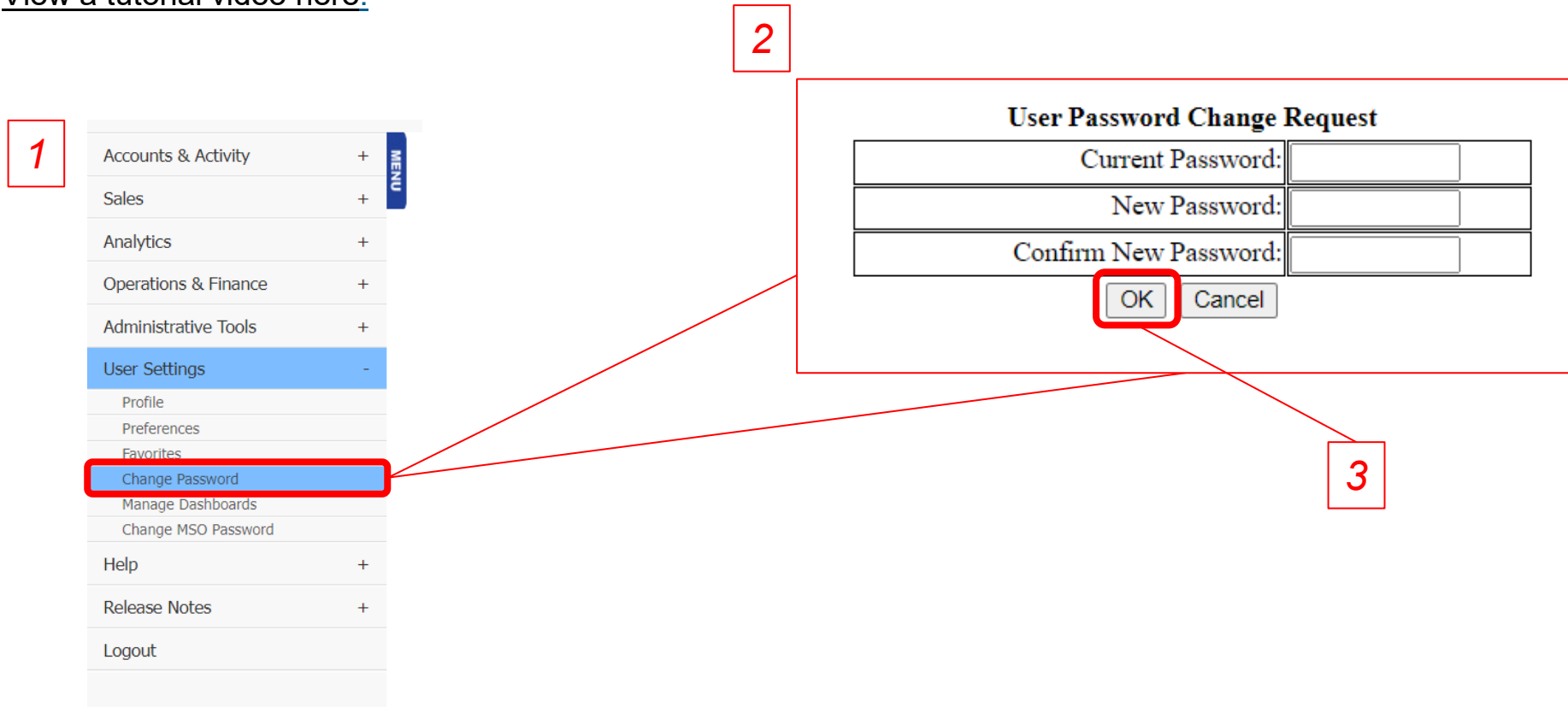
**Left Screenshot (Step 1 and 2):** Shows the mySalesChain login page. A red box labeled '1' highlights the entire page. A red box labeled '2' highlights the 'Forgot your password?' link located below the 'Sign in' button. The login form includes fields for 'Company ID', 'User ID', and 'Password', a 'Remember me' checkbox, and a 'Sign in' button.

**Right Screenshot (Steps 3 and 4):** Shows the 'Forgot your password?' page. A red box labeled '3' highlights the input fields for 'Company ID', 'User ID', and 'Email Address'. A red box labeled '4' highlights the 'Send Reminder' button.

**To change your SalesChain Account Password:**

1. Navigate to: *Menu Sidebar > User Settings > Change Password*
2. Enter your Current and desired new password
3. Click “Ok”

[View a tutorial video here.](#)



The software navigation tools will be accessible from all screens.

- **Important:** Don't use your browser's navigation buttons to navigate within the software. This can cause an error.
- [View a tutorial Video Here](#)

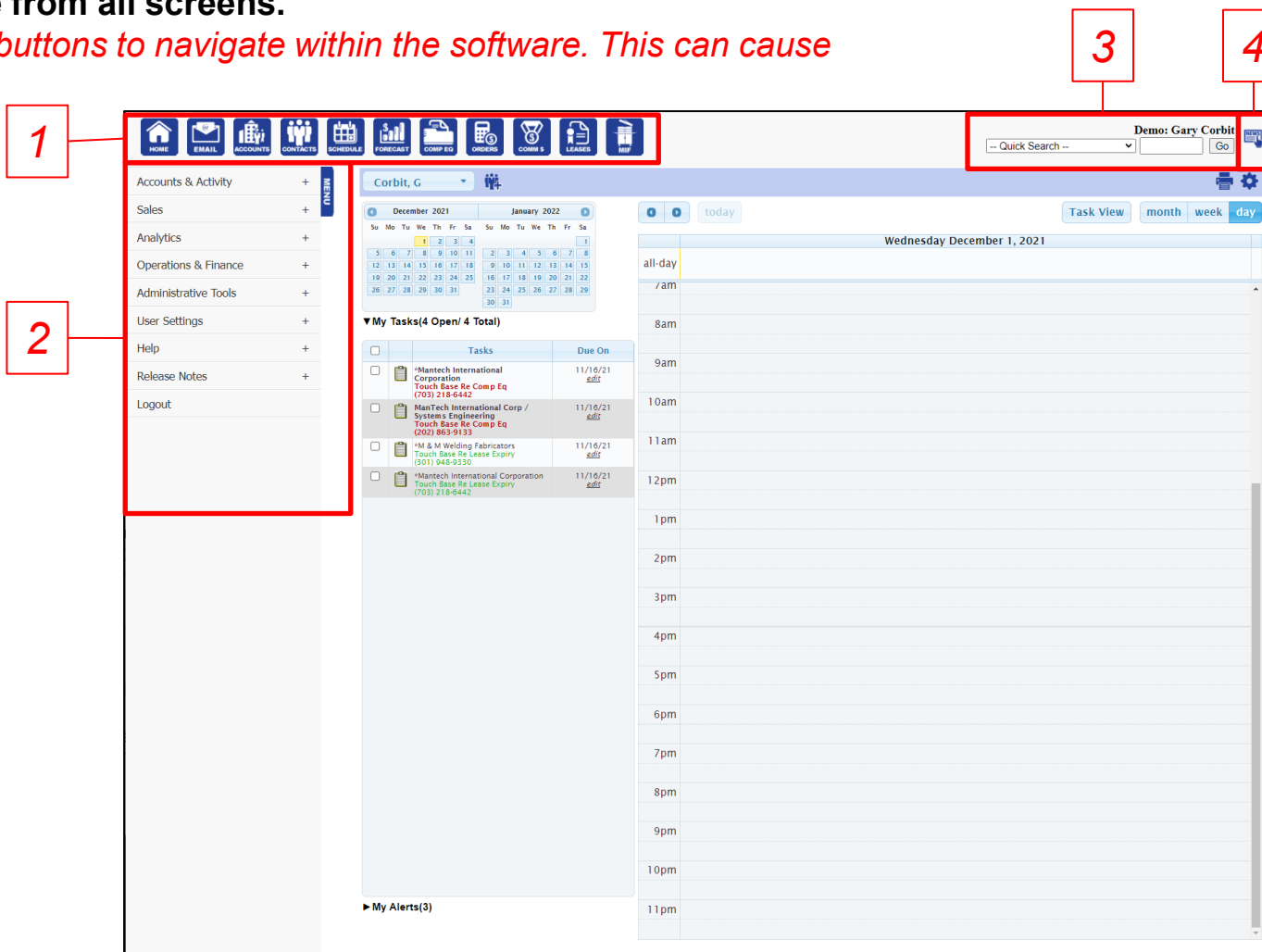
### Key:

- 1) Favorites Buttons.** Serve as shortcuts to their shown functions
- 2) Menu Sidebar.** Lists all available pages
- 3) Quick Search.** Quickly search the database for several user, account and order related keywords. See [page 18](#)
- 4) News button.** Displays recent SalesChain announcements

### Quick Tip:

The Home Icon returns to the top level of the currently used tool.

To show/hide the menu bar, click the Menu icon. A (+) indicates that the header has a sub-menu.



## How To: Customize Your Favorites Bar

**To choose which icons show up in your favorites bar:**

1. Navigate to: *Menu Sidebar > User Settings > Favorites.*
2. Check the box next to the items you wish to have in your favorites bar (or un-check those which you do not want to see).
3. Click "Save".

The screenshot illustrates the steps to customize the favorites bar. On the left, a menu sidebar (callout 1) shows 'User Settings' expanded, with 'Favorites' selected. The main area, titled 'User Favorites', lists various icons and their corresponding names. A red box (callout 2) highlights the checkboxes for each item, showing that most are checked. At the top right of this section, the 'Save' button is highlighted with a red box (callout 3), and a 'Cancel' button is also visible.

Icon	Name	Checked
EMAIL	Email	<input checked="" type="checkbox"/>
ACCOUNTS	Accounts	<input checked="" type="checkbox"/>
CONTACTS	Contacts	<input checked="" type="checkbox"/>
SCHEDULE	Schedule	<input checked="" type="checkbox"/>
FORECAST	Forecast	<input checked="" type="checkbox"/>
COMP EQ	Comp EQ Desk	<input checked="" type="checkbox"/>
CHARTS	Charts	<input type="checkbox"/>
ORDERS	Order Desk	<input checked="" type="checkbox"/>
DELIVERY	Delivery Desk	<input type="checkbox"/>

## How To: Change User Preferences

You're able to change your user settings in the system to better suit your needs.

*Note: Changing some user preferences can result in major changes to the login or order screens. If you are not sure what a setting does, call the SalesChain help desk before making changes!*

To change your user preferences:

1. Navigate to: *Menu Sidebar > User Settings > Preferences*
2. Make sure the "Use System Default" box is unchecked
3. Make the desired changes to your user settings
4. Click "Save"

[View a tutorial Video Here](#)

### Quick Tip:

You must log out and log back in for any changes to take effect.

The screenshot shows the 'USER DEFAULT CONFIGURATION' page. A red box labeled '1' highlights the 'Preferences' option in the left-hand menu. A red box labeled '2' highlights the 'Use System Default' checkbox, which is currently unchecked. A red box labeled '3' highlights the 'Save' button in the top right corner. The main content area is divided into sections: HOME PAGE, SCHEDULE, CONTACTS, and ACCOUNTS, each with various configuration options like Default View, Appointment Interval, and filters.

## How To: Perform a Quick Search

### To perform a quick search:

1. Choose your Quick Search criterion from the drop-down menu
2. Type the appropriate name or number in the next field
3. Click “Go”
4. Browse Results

**1**

**2**

**3**

Demo: Gary Corbit

8. ALL Account By Name (Substring) church

Go

1. Account By Name (Substring)

2. Account By SalesChain ID#

3. Account By eAutomate#

4. Account By Phone

5. OBD by OBD#

6. Contact by First Name

7. Contact by Last Name

8. ALL Account By Name (Substring)

9. ALL Account By Phone

10. ALL Account By Dnb#

11. ALL Account By Address

Asset By Asset Tag

Asset By Serial Nbr

Asset By Model

Asset By Install Date

Lease by Lease Nbr

Lead By SalesChain ID#

Comp EQ By Serial Number

Comp-Eq By SalesChain ID#

month week day

**4**

ALL Account By Name (Substring) {like church}

View 1 - 50 of 1,464

Page 1 of 30

CustID	Name	Addr	Rep	Customer
88410	1st Baptist Church-vienna Fcu	450 Orchard St Nw Vienna, VA 22180	Doe, J	No
98523	4 Mile Creek Baptist Church	2950 New Market Rd Henrico, VA 23231	Bastin, T	No
42768	Abundant Life Baptist Church - Woodbridge	4912 Lanyard Lane Woodbridge, VA 22192	Bastin, T	No
97692	Abundant Life Church	700 Aylor Rd Stephens City, VA 22655	Bastin, T	No
91065	Abundant Life Church Of Christ	3300 Neale St Richmond, VA 23223	Bastin, T	No
101414	Abyssinia Baptist Church	2816 Colley Ave Norfolk, VA 23508	Bastin, T	No
70404	Adams Grove Baptist Church	24463 Adams Grove Rd Emporia, VA 23847	Bastin, T	No
83738	Advent Lutheran Church Elca	2222 S Arlington Ridge Rd Arlington, VA 22202	Bastin, T	No
97691	Agape Christian Church	199 Agape Way Stephens City, VA 22655	Bastin, T	No
101557	Albemarle Baptist Church	1685 Roslyn Ridge Rd Charlottesville, VA 22901	Bastin, T	No
38185	Alexandria Christian Center / Love International Church	6621-G Electronic Drive Springfield, VA 22310	Bastin, T	No
61955	Alexandria Church Of Christ	111 E Braddock Rd Alexandria, VA 22301	Bastin, T	No
83742	Alexandria Presbyterian Church	2405 Russell Rd Alexandria, VA 22301	Bastin, T	No
42579	Alfred Street Baptist Church	301 South Alfred Street Alexandria, VA 22314	Bastin, T	No
45580	All Nations Baptist Church	2001 North Capitol St, NE Washington, DC 20002	Corbit, G	No


2

# Accounts and Contacts

CRM functions within the SalesChain system including activity tracking and account management.



**The accounts screen displays all company records that are accessible by a user.**

- To open the accounts desk if you have it set as a favorite, click on the Accounts icon 
- OR navigate to: *Menu Sidebar > Accounts and Activity > Accounts*

**Key:**

- 1) Create a new account
- 2) Print report (*permission pending*)
- 3) Advanced profile viewer
- 4) Shows/hides search toolbar
- 5) Column chooser
- 6) Save search criteria as default
- 7) Actions drop down
- 8) Advanced search fields
- 9) Basic search any column header
- 10) Click on any account to view its details

## Columns In the Accounts Desk

Column	Description
C	C stands for <i>Customer</i> and indicates the account is a customer.
L	L stands for <i>Lead</i> and indicates the account has an active lead.
H	H stands for <i>HubSpot</i> and indicates the account is syncing with HubSpot.
ID	Displays the account's SalesChain ID number which is assigned upon account creation. This number helps SalesChain support staff identify the account.
Cust#	Cust# is short for <i>Customer Number</i> . This column displays the account's e-Automate number if a record of this account exists in e-Automate.
Sales Rep	Displays the primary sales rep user who is assigned to this account.
Name	Displays the name of the company which this account record represents.
LL	LL is short for <i>Lease Legal</i> and displays the Legal name of the company which this account record represents.
DBA	DBA is short for <i>Doing Business As</i> and displays the formal DBA name of the company which this account record represents.
Address	Displays the street address of this company record.
City	Displays the city in which this company record is listed.
State	Displays the state code in which this company record is listed.
Zip	Displays the zip code in which this company record is listed.
Phone	Displays the business phone number associated with this account.
URL	Displays the URL of the website associated with this account record.
Model	Displays the model of machine if you are performing a search with an asset filter.
Class	Class is short for <i>Classification</i> and is highly customizable based on configuration. It displays profile targeting by size, product type, and customer status.
VClass	VClass is short for <i>Vertical Class</i> and displays this account records vertical class association.

Clicking on any account will bring you to the corresponding **Account View**.

*\*See Page 23 for more information regarding the icons & page 24 for more information regarding the tabs in the account view.*

## Key:





















- 1) Action and Activity Icons
- 2) Basic Account Information
- 3) Profile targeting and Segmentation Icons (if enabled)
- 4) Save Button (turns blue when there are unsaved changes)
- 5) Navigation Arrows
- 6) Switch View Layout
- 7) Profile Targeting Selections
- 8) Strategy Box
- 9) Quick Entry Utility
- 10) Next Call Date Utility
- 11) Detailed Information Tabs

The screenshot shows the 'ACCOUNT' view for a customer named 'FEDERALRESERVE'. The interface includes a top navigation bar with icons (1), a main form area with various fields (2), a right sidebar with profile targeting options (3, 4, 6, 7), a bottom section with strategy and quick entry utilities (8, 9, 10), and a bottom tab bar with various tabs (11). The 'Save' button (4) is highlighted in blue. The 'Profile' dropdown (6) is also visible.

## Quick Tip:

The default Account view is the Profiling View (shown above). You can change your default view via **Menu Sidebar > User Settings > Preferences**

## Action Icons in the Account View

Icon	Associated Action
	Print the contents of this report. (Permission Pending)
	Attach a document to the account.
	Generate document(s) for the account.
	Create a lead for the account.
	Compose a note for the account.
	Schedule a task for the account.
	Schedule an appointment for the account.
	Compose a new email for the account.
	Add a new contact to the account.
	Add competitor equipment information to the account.
	Edit the strategy development opportunity values.
	Create a new lease for the account.
	Create a new agreement for the account.
	Merge to customer account.
	Create a new proposal for the account.
	Create a new order for the account.
	View the Google map to locate this account.
	View the detailed profile entry form for the account.
	View the quick view entry form for the account.
	View the combined entry form for the account.

## Information Tabs in the Account View

Tab	Description
Contacts	Lists contacts for the account.
Book	Lists assets, agreements, and leases, for this account.
Activity	Lists emails, notes, tasks, appointments, and documents (attached and generated) for the account only or for all associated records.
TCO Analysis	TCO is short for total cost of ownership. It shows operating expenses for the customer's current machine fleet and proposes changes or additions to that fleet.
Sales	Lists leads, proposals, orders, and possibly competitor equipment for the account.
Marketing	Lists Dun & Bradstreet profile and marketing profile.
CompEQ	CompEQ is short for <i>competitive equipment</i> .
Groups	Lists groups that the account is assigned to and allows you to change group assignments.
Workflow	Lists workflow processes.
SRA	SRA is short for <i>sales rep assignment</i> .
All	Lists all items in the tabs.

Contacts

Book

Activity

TCO Analysis

Sales

Marketing

CompEQ

Groups

WorkFlow

SRA

ALL

Priority Contacts

Decision Maker

IT Contact

Finance

MPS

Legal

- Select -

- Select -

- Select -

- Select -

- Select -

Contacts


NAME/TITLE	PHONE	EMAIL
Smith, Mr. Tim CFO	O: (555) 555-5555	support@saleschain.com

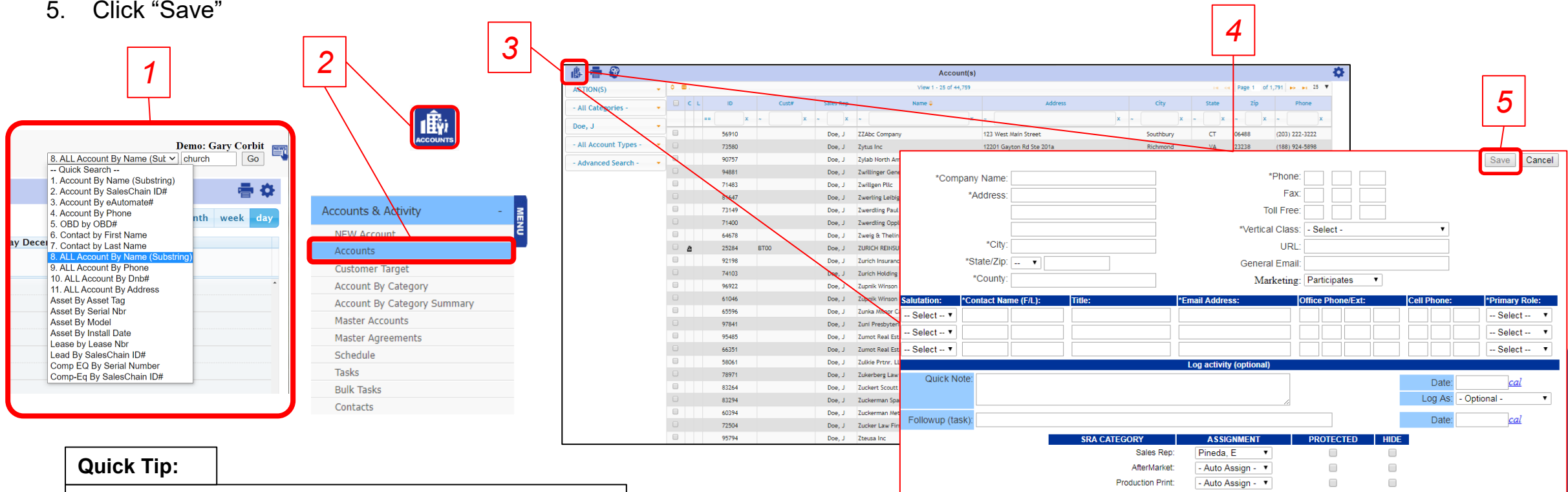
Pending Activity

TYPE	OBJECT	ON DATE	ACTIVITY	USER
	Lead #2698	12/02/2016	RE: Lead Assignment Followup 12/02/2016 Johnson, T	Johnson, T
	Account	06/10/2014 1:00AM	RE: test 2 03/30/2015 SCAdmin 03/30/2015 SCAdmin test	SCAdmin

## How To: Create a New Account

You can create a new account to add new companies to your SalesChain database. [View a tutorial Video Here](#)

1. **Due Diligence: Perform quick search #8 "All Account By Name (Substring)" to make sure the account does not yet exist.**
2. Navigate to the accounts screen by clicking on the Accounts icon OR navigate to: *Menu Sidebar > Accounts and Activity*
3. Click on the new account icon 
4. Enter account information including basic information, up to three contacts, a note, a follow-up task, and SRA Details.
5. Click "Save"



The screenshot shows the SalesChain Accounts interface. Red boxes and numbers 1 through 5 indicate the steps for creating a new account:

- 1:** A search dropdown menu is open, showing various search criteria. Option 8, "ALL Account By Name (Substring)", is highlighted.
- 2:** The "ACCOUNTS" icon in the top navigation bar is highlighted.
- 3:** The "NEW Account" button in the "Accounts & Activity" sidebar is highlighted.
- 4:** The "New Account" form is shown, containing fields for Company Name, Address, City, State/Zip, Phone, Fax, Toll Free, Vertical Class, URL, General Email, Marketing, and a table for contacts with columns for Salutation, Contact Name (F/I/L), Title, Email Address, Office Phone/Ext, Cell Phone, and Primary Role.
- 5:** The "Save" button at the bottom right of the form is highlighted.

**Quick Tip:**

You can also create a new account by navigating to *Menu Sidebar > Accounts and Activity > NEW account*

1. Type in your desired search and hit the *enter* key on your keyboard\*
2. Browse the results for the desired account record

[View a tutorial Video Here](#)

\*The icon to the left of each header search bar changes the search operation. If you need to search in a different way (contains vs. begins with) or if you are not seeing the information you expect, try changing the operation.

The X button next to each column header clears that column's active search

## How To: Search For an Account With the Drop-Downs

To perform basic account searches, you can use the column headers or the drop-down menus on the left-hand side of the accounts desk.

1. Select the specific criteria you're looking for from the drop downs shown
2. Browse the results for the desired account record

*For information on using the advanced search drop down, see pages [28 - 34](#).*

[View a tutorial Video Here](#)

1

ACTION(S)

- All Categories -

Doe, J

- All Account Types -

- Advanced Search -

	C	L	ID	Cust#	Sales Rep	Name	Address	City	State	Zip	Phone
<input type="checkbox"/>			56910		Doe, J	ZZAbc Company	123 West Main Street	Southbury	CT	06488	(203) 222-3222
<input type="checkbox"/>			73580		Doe, J	Zytus Inc	12201 Gayton Rd Ste 201a	Richmond	VA	23238	(188) 924-5898
<input type="checkbox"/>			90757		Doe, J	Zylab North America Llc	7918 Jones Branch Dr Ste 350	Mc Lean	VA	22102	(434) 704-5898
<input type="checkbox"/>			94881		Doe, J	Zwillinger Genetski	1705 N St Nw	Washington	DC	20036	(490) 324-5898
<input type="checkbox"/>			71483		Doe, J	Zwillgen Pllc	1900 M St Nw Ste 250	Washington	DC	20036	(161) 354-5898
<input type="checkbox"/>			81647		Doe, J	Zwerling Leibig & Moseley P C	108 N Alfred St Fl 1	Alexandria	VA	22314	(300) 914-5898
<input type="checkbox"/>			73149		Doe, J	Zwerdting Paul Kahn & Wolly	1025 Connecticut Ave Nw Ste 712	Washington	DC	20036	(183) 554-5898
<input type="checkbox"/>			71400		Doe, J	Zwerdting Opplerman & Adams	5020 Monument Ave Fl 1	Richmond	VA	23230	(160) 004-5898
<input type="checkbox"/>			64678		Doe, J	Zweig & Thelin Pc	8567 Sudley Rd Ste D	Manassas	VA	20110	(678) 945-8986
<input type="checkbox"/>			25284	BT00	Doe, J	ZURICH REINSURANCE	1 CANTERBURY GREEN	STAMFORD	CT	06901	(203) 262-1611
<input type="checkbox"/>			92198		Doe, J	Zurich Insurance	3951 Westerre Pkwy Ste 160	Henrico	VA	23233	(454) 274-5898
<input type="checkbox"/>			74103		Doe, J	Zurich Holding Co Of America	600 Red Brook Blvd Ste 350	Owings Mills	MD	21117	(196) 734-5898
<input type="checkbox"/>			96922		Doe, J	Zupnik Winson & Chen	9131 Piscataway Rd Ste 720	Clinton	MD	20735	(517) 964-5898
<input type="checkbox"/>			61046		Doe, J	Zupnik Winson & Chen	8218 Wisconsin Ave Ste 203	Bethesda	MD	20814	(182) 845-8986
<input type="checkbox"/>			65596		Doe, J	Zunka Milnor Carter & Inigo	414 Park St	Charlottesville	VA	22902	(805) 345-8986
<input type="checkbox"/>			97841		Doe, J	Zuni Presbyterian Homes Office	5279 Homegrown Ln	Zuni	VA	23898	(532) 454-5898
<input type="checkbox"/>			95485		Doe, J	Zumot Real Estate Management	1356 Beverly Rd Ste 250	Mc Lean	VA	22101	(498) 114-5898
<input type="checkbox"/>			66351		Doe, J	Zumot Real Estate	206 N Washington St	Alexandria	VA	22314	(909) 845-8986
<input type="checkbox"/>			58061		Doe, J	Zulkie Prtnr. LLC	135 S La Salle St Ste 3425	Chicago	IL	60603	(312) 419-1967
<input type="checkbox"/>			78971		Doe, J	Zukerberg Law Ctr Pllc	1790 Lanier Pl Nw	Washington	DC	20009	(262) 334-5898
<input type="checkbox"/>			83264		Doe, J	Zuckert Scoutt & Rasenberger	888 17th St Nw Ste 700	Washington	DC	20006	(324) 734-5898
<input type="checkbox"/>			83294		Doe, J	Zuckerman Spaeder Llp	1800 M St Nw Ste 1000	Washington	DC	20036	(325) 864-5898
<input type="checkbox"/>			60394		Doe, J	Zuckerman Metals Inc	221 E 5th St	Front Royal	VA	22630	(834) 458-9865
<input type="checkbox"/>			72504		Doe, J	Zucker Law Firm Llc	3809 Whitman Rd	Annandale	VA	22003	(174) 704-5898
<input type="checkbox"/>			95794		Doe, J	Zteusa Inc	607 Herndon Pkwy Ste 101	Herndon	VA	20170	(501) 994-5898

**Quick Tip:**

The drop downs shown may differ depending on system configuration or user permission level.

2

## How To: Perform an Advanced Search for Accounts

To search for more detailed account information than is offered in the column headers or drop-downs, you can perform **advanced searches**.

1. Click on the advanced search drop down
2. Select the category of criteria you would like to search by, account activity in this example. See pages [29 - 34](#) for more detailed criteria information
3. Enter your desired search in the pop-up window
4. Click "Search"
5. Browse the results

[View a tutorial Video Here](#)

**1** - Advanced Search -

**2** - Activity

**3** - Activity

**4** - Search

**5** - Results

ACTION(S)	C	L	H	ID	Cust#	Name	Address	City	State	Zip	Phone
- All Categories -											
- All Next Call Dates -											
- All Sales Reps -											
- All Account Types -											
- Advanced Search -											
				28871	*Loaner	*Loaner Equipment	4601 Eisenhower street	Alexandria	WY	22304	(703) 461-8195
				78584		1722 Eye Street Assoc	1722 I St Nw	Washington	DC	20006	(256) 194-5898
				26375	DOD/Airforce	1EEUROPE	255 WARREN STREET #1104	JERSEY CITY	NJ	07302	(203) 262-1611
				81571		1st Advantage Federal Cu	1207 Fenwick Dr	Lynchburg	VA	24502	(299) 754-5898
				58714		1st Capital Surety & Trust Co.	230 W Wells St Ste 402	Milwaukee	WI	53203	(414) 276-1200
				58504		1st Capital Surety & Trust Co.	644 N. Bedford Rd	Brookfield	WI	53045	(262) 797-7100
								Madison	WI	53718	(608) 443-2200
								WINDSOR	CT	06095	(203) 262-1611
								Waterbury	CT	06488	(203) 333-3333
								Southbury	CT	06488	(203) 262-1611

## Advanced Account Searching: *Activity*

The advanced search allows you to search for recent user activity on accounts. You can search for the below criteria:

- *Life Cycle*: Search for the date the account was created or last edited
- *Note Contains*: Search notes for certain pieces of text with a keyword search
- *Last Activity*: Search for accounts with past activity within a certain timeframe
- *Next Activity*: Search for accounts with pending activity scheduled within a certain timeframe
- *Next Call Objective*: Search for the activity type of the next call date activity

**Activity** [X]

Life Cycle: -Select- [ ]

Note Contains: [ ]

Last Activity: Within the last 7 days [v]

Next Activity: -Scheduled In- [v]

Next Call Objective: - Optional - [v]

[Search]

*Note: These are the default fields. Additional fields may appear in this pop up depending on your system configuration.*

### Quick Tip:

When searching for next or last activity, use the *category* basic search drop-down to determine which relative rep or reps' activity you're searching for. If none is selected, you will be searching for all activity, regardless of what user performed that activity.

For example: use *sales rep* to search for activity by the account's relative sales rep only.

ACTION(S) [v]

- All Categories - [v]

- All Categories -

AfterMarket

Production Print

Sales Rep

Support Rep

- Advanced Search - [v]

The advanced search allows you to search for detailed account information. You can search for the below criteria or click on *more* for additional fields:

- *Group*: Narrow your search to display only accounts which are members of a certain group.
- *Vertical Class*: Search for accounts which are members of a certain vertical class.
- *Classification*: *Search for accounts which are members of a certain classification, such as churches or corporations.*
- *Marketing*: Search for only accounts which are flagged as participants in marketing campaigns, for those which are omitted, or those that participate only via phone or email.
- *Has Email Address*: Search for accounts which have an email address, whether at the company level or with an associated contact.
- *eAuto#*: Search for accounts by their e-Automate Number.
- *HubSpot Sync*: For users of our HubSpot integration. Search for accounts which do or do not sync with HubSpot.

*Note: These are the default fields. Additional fields may appear in this pop up depending on your system configuration.*

#### Quick Tip:

Click *More* to expand the *Account Info* advanced search and search for more detailed marketing information which may have come in from EDA data leads, manual entry, or elsewhere including revenue, number of employees and more.

## Advanced Account Searching: Account Info

**Account Info**

☐ Group: - All Groups - ☐ Not a Member

Vertical Class: -Vertical Class- ☐ Not in V-Class

Classification: -Classification- ☐ Not w/Class

Marketing: -Select-

Has Email Address: -Select-

eAuto#:

HubSpot Sync: -Select-

**More**

**Search**

---

**Account Info (Expanded)**

DnB#:

Location: -All Values-

Ownership: -All Values-

# Employees as Location:  (>= And <=)

Sq/Ft Location:  (>= And <=)

Is Subsidiary: -Select-

Dnb Cleansed: -Select-

Industry: -Select a Major Group-

SIC Code: -All SICCode2-

SIC Code: -Select-

# Employees:  (>= And <=)

# MFPs:  (>= And <=)

# Printers:  (>= And <=)

# PCs:  (>= And <=)

# Servers:  (>= And <=)

Est Copy Volume:  (>= And <=)

Est Print Volume:  (>= And <=)

Assoc w/WF: -Select- ☐ Not Assoc w/WF

**Search**

The advanced search allows you to search for accounts based upon their geographical information. You can search for the below criteria:

- *Street*: Search for one or many street addresses
- *City*: Search for one or many city names
- *State Code*: Search for one or many state codes
- *Zip Code*: Search for one or many zip codes
- *County*: Select a county from the drop-down to search for accounts in that county. Drop-down options are made available based upon information in your SalesChain database, meaning you will only be able to chose from those counties which exist in the system and to which accounts are assigned.

*Note: These are the default fields. Additional fields may appear in this pop up depending on your system configuration.*

## Advanced Account Searching: Geography

**Geography** [X]

Street:

City:

State Code:

Zip Code: 22304, 22033

County: -County- ▼

Search

### Quick Tip:

Advanced Search fields allow you to search for multiple values by creating comma separated lists (such as the example in the screenshot top right). This is particularly helpful when searching for accounts in several zip codes for either blitzing campaigns or initial sales rep assignment.

## Advanced Account Searching: Rep Assignment

The advanced search allows you to modify the basic drop-down searches for rep assignment and category (see figure 1). You can alter the below criteria:

- *Not Associated w/Selected Rep*: Check this box to invert the *Sales Rep* basic search drop-down's operation, and view accounts not associated with that rep
- *Show Hidden*: Show accounts which otherwise have a hidden status (permission pending)
- *Protected*: Search for accounts which do or do not have a protected status. This status prevents accounts from falling into the automatic assignment rules based on zip code or other territory assignments.

*Note: These are the default fields. Additional fields may appear in this pop up depending on your system configuration.*

### Quick Tip:

The rep assignment advanced searches are intended to modify basic searches for Sales Rep and Sales Rep Category, which are performed using the basic search drop-downs. See [page 20](#) for more information and the images to the right for reference.

figure 1: Basic searches for sales rep and sales rep category

## Advanced Account Searching: *Competitive Equipment*

The advanced search allows you to search for accounts based upon associated competitive equipment records. You can search for the below criteria:

- *Comp Manufacturer*: Narrow your search to accounts with competitive equipment records for a specific manufacturer. Drop-down options are made available based upon information in your SalesChain database, meaning you will only be able to chose from those manufacturers for which competitive equipment records exist in the system. Check the *Not w/Manufacturer* box to invert the search.
- *Comp Model*: Search for accounts with competitive equipment records which have a specific model name or number.
- *Comp Lease*: Search for accounts with competitive leases expiring within a certain time frame or based on competitive lease status.



**Competitive EQ** [X]

Comp Manufacturer: -Manufacturer- [v] ☐ Not w/Manufacturer

Comp Model: [Text Input]

Comp Lease: -Select- [v]

[Search]

*Note: These are the default fields. Additional fields may appear in this pop up depending on your system configuration.*

**Quick Tip:**

For a comprehensive view of competitive equipment records themselves, try the Comp Eq Desk. See page 77

## Advanced Account Searching: Asset/Contract/Lease

The advanced search allows you to search asset, contract, and lease information from your ERP system right inside of SalesChain. You can search for the below criteria:

- **Lease:** Search for accounts with leases expiring within a certain time frame, not within a certain time frame, or based on lease status.
- **Service:** Search for accounts with service contracts expiring within a certain time frame, not within a certain time frame, or based on contract status.
- **Service Priority:** Search for contracts with different service priority statuses.
- **Service Calls:** Search for accounts based upon a certain volume of service calls within a time period. For this search, select both a time period and enter a numeric value.
- **Contract Type:** Search for accounts that have certain types of contracts.
- **# Machines:** Search for contracts with a certain number of machines on them with distinct equipment ID's. You can enter a greater than or equal to value, less than or equal to value, or both.
- **Has Manufacturer:** Search for accounts that have a certain manufacturer's equipment. Check the *Not w/Manufacturer* box to invert this search.
- **Has EA Category:** Search for accounts who have equipment of a certain EA Category.
- **Has Model:** Search for accounts that have a specific model name or number.
- **Install Date:** Search for accounts with install dates within a certain time frame or not within a certain time frame.
- **Average Usage:** Search for accounts generating a certain amount of a certain type of meter read within a certain period. For this search, select both a time period and enter a numeric value and choose a meter type if you would like. If you do not choose a meter type, the search will display results for all meter types.

Asset/Contract/Lease

Lease: -Select-

Service: -Select-

Service Priority: -Select-

Service Calls: -Time- >

Contract Type: -Contract Type-

# Machines: (>= Distinct Equipment ID's <=)

Has Manufacturer: -Manufacturer- ☐ Not w/Manufacturer

Has EA Category: -Category-

Has Model:

Install Date: -Select-

Equipment ID:

Average Usage: - All Meter Types - -Time- >

Search

*Note: These are the default fields. Additional fields may appear in this pop up depending on your system configuration.*

## How To: Create a Group of Accounts

It is possible to create a group of accounts for easy reference across the SalesChain system.

[View a tutorial Video Here](#)

To create a group of accounts:

1. Navigate to the accounts desk
2. Search for the accounts you would like to add to a new group
3. Select the accounts you would like to add to this group using the check boxes
4. Open the *Actions* drop-down and click *Create Group*
5. In the dialogue box, type a name for your new group.
6. Click *Save*

The screenshot illustrates the steps to create a group of accounts in the SalesChain system. The interface shows the 'Account(s)' desk with a table of accounts. The 'ACTION(S)' dropdown menu is open, and the 'Create Group' option is selected. The 'Create Group' dialog box is displayed, showing the group name 'CT Churches' and the 'Public' checkbox checked. The 'Save' button is also visible.

ID	Sales Rep	Name	Address
42350	Szczygiel, T	Christchurch Office Products Depot	6 Bath St
38554	Szczygiel, T	Church Office Equipment(owned by	630 Forest Avenue

### Quick Tip:

Check the box next to *Public* in order to make your group visible to other users of SalesChain at your company. Other users may see the group, but not accounts within it that they would not otherwise have access to.

## How To: Add or Remove Accounts From An Existing Group

It is possible to add accounts into or remove them from an existing group in bulk from the accounts desk.

[View a tutorial Video Here](#)

To add/remove a group of accounts:

1. Navigate to the accounts desk
2. Search for the accounts you would like to add to/remove from an existing group
3. Select the accounts you would like to add to/remove from this group using the check boxes
4. Open the *Actions* drop-down and click *Group Assign*
5. Select the group to which you would like to add or remove these accounts.
6. Click *Associate* or *Disassociate*

The screenshot displays the 'Account(s)' desk interface. A table lists accounts with columns for ID, Cust#, Name, and Address. Two accounts are highlighted in yellow: '1st Baptist Church-vienna Fcu' and '4 Mile Creek Baptist Church'. The 'Actions' menu is open on the left, with 'Group Assign' selected. A 'Group Assign' modal is open on the right, showing a dropdown menu with 'Churches (Common)' selected and 'Include Private Groups' unchecked. The 'Associate' and 'Disassociate' buttons are visible at the bottom of the modal.

ID	Cust#	Name	Address
88410		1st Baptist Church-vienna Fcu	450 Orchard St Nw
98523		4 Mile Creek Baptist Church	2950 New Market Rd
61955		Alexandria Church Of Christ	111 E Braddock Rd
83742		Alexandria Presbyterian Church	2405 Russell Rd
42579		Alfred Street Baptist Church	301 South Alfred Street
45580		All Nations Baptist Church	2001 North Capitol St, NE

### Quick Tips:

- You can also associate or disassociate an account from a group using the *groups* tab in the account view itself. See page [24](#)
- The *Include Private Groups* check box will add user specific groups to the drop down rather than only showing public groups.

## How To: Add or Remove Accounts From An Existing Group in the Account View

It is possible to add or remove accounts to or from groups within the account view.

[View a tutorial Video Here](#)

a) To add an account to or remove it from an existing group:

1. Navigate to the account you would like to add or remove from a group and select the *Groups* or *All* tab to view group associations
2. Select the group you would like to add this account to using the *groups* drop-down below the table.
3. Click *Assign*

b) To remove an account from an existing group:

1. Click *unassign* next to the group that you would like to remove this account from

The screenshot shows the SalesChain interface with the 'Groups' tab selected. The 'Associated to Group(s)' table lists several groups with their names, descriptions, and actions. Red callouts highlight the following elements:

- 1a**: Points to the 'Groups' tab in the top navigation bar.
- 2a**: Points to the 'Customer (Common)' dropdown menu in the 'Group(s):' section.
- 3a**: Points to the 'Assign' button in the 'Group(s):' section.
- 1b**: Points to the 'unassign' link in the 'ACTION' column of the table.

NAME	DESCRIPTION	ACTION
Alyssa_Test_Group	Alyssa's test group	<a href="#">unassign</a>
Eric Accounts	-	<a href="#">unassign</a>
InfoUSA_2017_01_05	Imported group (InfoUSA_2017_01_05)	<a href="#">unassign</a>
InfoUSAImportDupes_20170105	Imported group (InfoUSAImportDupes_20170105)	<a href="#">unassign</a>
Test	-	<a href="#">unassign</a>
Top_Accounts	Top accounts for reps to add in	<a href="#">unassign</a>

Group(s): Customer (Common) Assign

## How To: Assign an Account to a Different Rep

It is possible to change an account's sales rep assignment from the account view.

To change an account's rep assignment:

1. Navigate to the account you would like to add or remove from a group and select the *SRA* or *All* tab to view sales rep assignments
2. Using the drop-downs next to the desired rep category, select the user to whom you would like to assign this account. (In this example, we are assigning Bennet, Tony as the Sales Rep)
3. Click *Save* at the top right of the account view

The screenshot shows the SalesChain interface with the following elements:

- Top Navigation Bar:** Contains icons for settings, help, and a **Save** button (highlighted with a red box and number 3).
- Account View:** Displays "Sales Rep: Bennet, Tony" and a "Profiling" dropdown.
- Account Tabs:** Includes Contacts, Book, Activity, TCO Analysis, Sales, Marketing, CompEQ, Groups, WorkFlow, **SRA** (highlighted with a red box and number 1), and **ALL** (highlighted with a red box and number 1).
- Sales Rep Assignments Table:**

CATEGORY	SALES REP	PROTECTED	HIDE
Sales Rep	Bennet, Tony (highlighted with a red box and number 2)	<input type="checkbox"/>	<input type="checkbox"/>
AfterMarket	Smith, Frank	<input type="checkbox"/>	<input type="checkbox"/>
Production Print	O'Mara, Jennifer	<input type="checkbox"/>	<input type="checkbox"/>
Support Rep	Administrator, Saleschain	<input type="checkbox"/>	<input type="checkbox"/>

### Quick Tip:

It is possible to reassign accounts to a different rep in bulk using the accounts desk. [See page 62](#)

The Customer Profile View is geared towards combining basic account searches and industry information with size-oriented searches like revenue and number of employees for specific and detailed account profiling.

## Key:

- 1) Go to the account desk (see page 20)
- 2) Shows/hides search toolbar
- 3) Column chooser
- 4) Save the contents of this report as your default
- 5) Actions drop-down
- 6) Basic search drop-downs
- 7) Select which profile to view (ex: Sales Rep, Production Print)
- 8) Toggle relationship and activity information
- 9) Basic search any column header
- 10) Click on any account to view its details

The screenshot shows the Customer Profile Viewer interface. The left sidebar contains a list of filters and actions, and the main area displays a table of account profiles. Red boxes and numbers 1 through 10 highlight specific features:

- 1: User profile icon in the top left.
- 2: Search toolbar icon in the top left.
- 3: Column chooser icon in the top left.
- 4: Settings gear icon in the top right.
- 5: 'ACTION(S)' dropdown menu in the left sidebar.
- 6: Basic search drop-downs in the left sidebar.
- 7: 'VIEW PROFILE' dropdown menu in the left sidebar.
- 8: 'Show Relationships' and 'Show Activities' checkboxes in the left sidebar.
- 9: Search filters in the table header.
- 10: A specific account profile row in the table.

	C	Sales Rep	Name	Created	Target	SIC Code	Industry	#Emp	\$Rev	Class	EDA
<input type="checkbox"/>		Corbit, G	*Loaner Equipment 4601 Eisenhower street Alexandria, WY 22304 (703) 461-8195					0			
<input type="checkbox"/>		Corbit, G	*M & M Welding Fabricators 8100 Cessna Avenue Gaithersburg, MD 20879 (301) 948-9330					0	\$34,567,000		
<input type="checkbox"/>		Corbit, G	*Mantech International Corporation 12015 Lee Jackson Highway Fairfax, VA 22033 (703) 218-6442					0			
<input type="checkbox"/>		O'Mara, J	*Millennium Capital / First Trust National Mortgage 8521 Leesburg Pike Vienna, VA 22182 (203) 910-7165					0			
<input type="checkbox"/>		O'Mara, J	*Mitre Corporation 7515 Colshire Drive Mc Lean, VA 22102 (703) 983-7493					0			
<input type="checkbox"/>		Corbit, G	*NOVA-Northern Virginia Community Hospital 601 Carlin Springs Road Arlington, VA 22204 (703) 578-2241					0			
<input type="checkbox"/>		Bastin, T	*R & B Impressions, Inc.					0			


## Quick Tip:

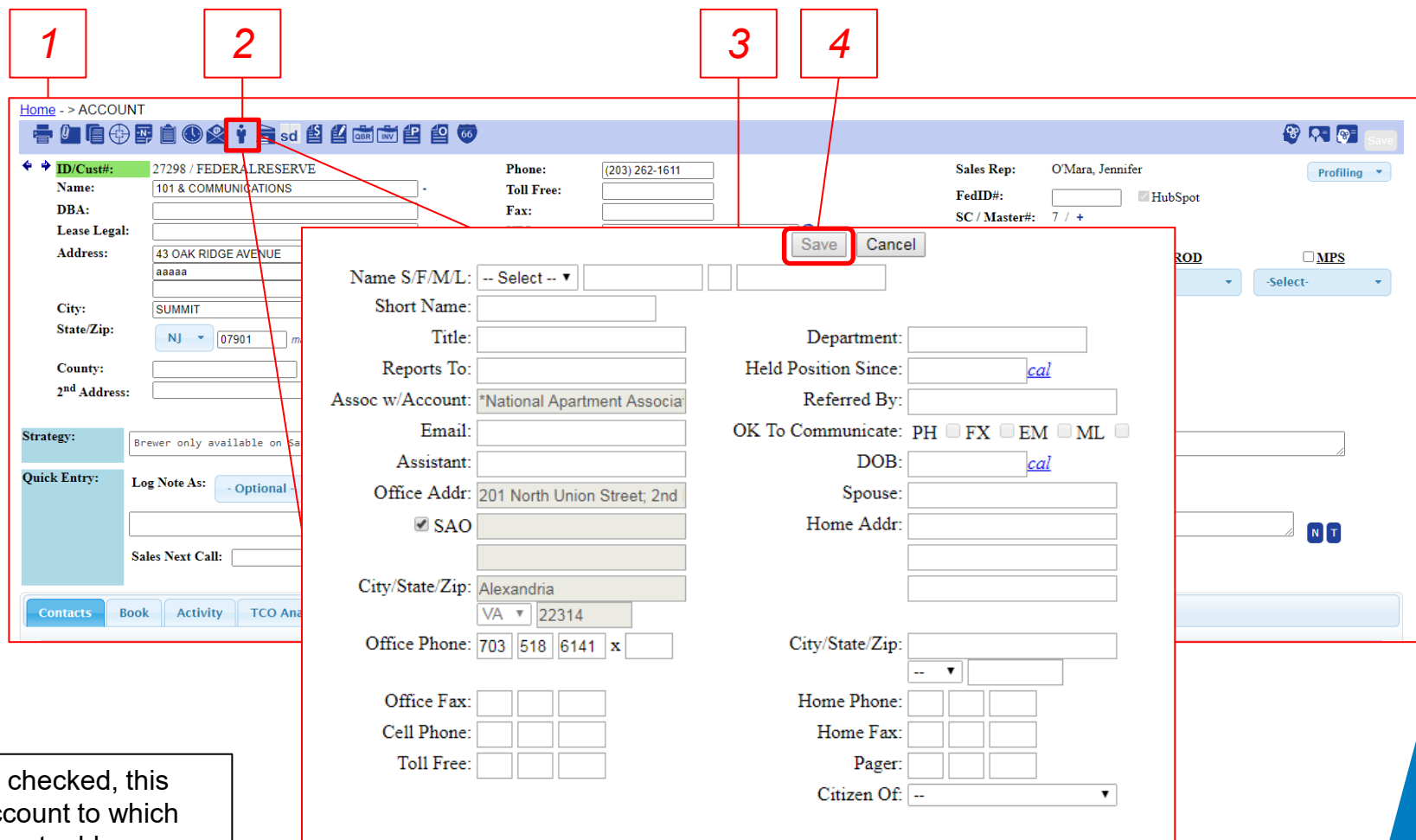
Basic searching via drop-downs and column headers is performed in the same manner as the account desk. See pages 26 and 27 for instructions.

## How To: Add a Contact To an Account

After you have created an account, it is possible to add additional contacts to it. Accounts can have as many contacts as needed.

To add a new contact:

1. View the desired account
2. Click the *new contact* icon 
3. Enter contact's information
4. Click Save



The screenshot shows the 'ACCOUNT' page for ID/Cust# 27298 / FEDERAL RESERVE. The account name is '101 & COMMUNICATIONS'. The address is '43 OAK RIDGE AVENUE, SUMMIT, NJ 07901'. The contact information for the account is: Phone: (203) 262-1611, Toll Free: , Fax: . The sales representative is O'Mara, Jennifer. The account has a HubSpot integration and a SC / Master# of 7 / +.

The 'new contact' icon is highlighted with a red box and the number 2. The modal form for adding a new contact is open, with the 'Save' button highlighted with a red box and the number 4. The form contains the following fields:

- Name S/F/M/L: -- Select --
- Short Name:
- Title:
- Reports To:
- Assoc w/Account: \*National Apartment Associa
- Email:
- Assistant:
- Office Addr: 201 North Union Street, 2nd
- ☒ SAO
- City/State/Zip: Alexandria VA 22314
- Office Phone: 703 518 6141 x
- Office Fax:
- Cell Phone:
- Toll Free:
- Department:
- Held Position Since: cal
- Referred By:
- OK To Communicate: PH ☐ FX ☐ EM ☐ ML ☐
- DOB: cal
- Spouse:
- Home Addr:
- City/State/Zip:
- Home Phone:
- Home Fax:
- Pager:
- Citizen Of: --


### Quick Tip:

SAO is short for *Same Address as Office*. When checked, this makes the contact's address the same as the account to which they are associated. If you prefer to enter a different address, uncheck the SAO box.

It is possible to merge two accounts in the SalesChain system. Merging accounts is a permission granted to certain user types, defined by the customer as part of the onboarding process.

*Important: A merge of two accounts cannot be reversed. You will also need to be assigned as the sales rep for both accounts unless you have admin permissions. For instructions on changing sales rep assignment, see page 38.*

To merge accounts:

1. Obtain the SalesChain ID or e-Automate number of the **target** account (see quick tip)
2. View the **source** account (The account you wish to merge into the **target**) and click on the merge account icon 
3. Enter either the SalesChain ID or e-Automate number of the **target** account *Note: DO NOT enter both an e-Automate number and a SalesChain ID.*
4. Click Next>>
5. Review and confirm the information and Click Merge >>

[View a tutorial Video Here](#)

### Quick Tip:

The **target** account is the account you are merging into. Therefore, its information will remain after the merge. This includes name, address, and phone number.

## How To: Merge Accounts

Home - > ACCOUNT

1. ID/Cust#: 59810 /

Name: 1st Weber Grp. Inc. -

DBA:

Lease Legal:

Address: 5250 E Terrace Dr Ste I +

City: Madison

State/Zip: WI 53718 map

Home - > ACCOUNT

2. ID/Cust#: 58504 /

Name: 1st Weber Grp. Inc. -

DBA:

Lease Legal:

Address: 611 N Barker Rd +

City: Brookfield

3. Merge Account

Enter eAuto Number:

Enter SalesChain ID: 59810

4. Next >> Cancel

5. Merge Account

SOURCE ACCOUNT >>>		>>> TARGET ACCOUNT	
Name:	1st Weber Grp. Inc.	Name:	1st Weber Grp. Inc.
Address:	611 N Barker Rd Brookfield, WI 53045	Address:	5250 E Terrace Dr Ste I Madison, WI 53718
Phone#:	(262) 797-7100	Phone#:	(608) 443-2200
Primary Rep:	Doe, J	Primary Rep:	Doe, J
SalesChain ID:	58504	SalesChain ID:	59810
eAuto#:		eAuto#:	

☒ Delete Source After Merge

☒ Update Customer Fields

Back Merge >> Cancel

The contacts screen displays all contact records that are accessible by a user and their account associations where applicable.

- To open the contacts desk if you have it set as a favorite, click on the Contacts icon
- OR navigate to: *Menu Sidebar > Accounts and Activity > Contacts*



## Key:

- 1) Create a new contact (see page 45)
- 2) Download this contact list (permission pending)
- 3) Schedule this report to be emailed to yourself or others
- 4) Shows/hides search toolbar
- 5) Save the contents of this report as your default
- 6) Actions drop-down
- 7) Basic search drop-downs
- 8) Basic search any column header
- 9) Click on any contact to view their details. (see page 43)
- 10) Click on any account to view its details. (see page 22)

## Quick Tip:

Basic searching via drop-downs and column headers is performed in the same manner as the account desk. See pages 26 & 27 for instructions.

The screenshot shows the 'Contacts' screen in the SalesChain application. The interface includes a top toolbar with icons for creating, downloading, and scheduling reports. Below the toolbar is an 'ACTION(S)' drop-down menu. The main area is a table of contact records with columns for First, Last, Title, Company, Email, Office, Cell, and Fax. A search toolbar is located above the table. The interface is annotated with numbered callouts: 1 points to the 'Create New Contact' icon; 2 points to the 'Download Contact List' icon; 3 points to the 'Schedule Report' icon; 4 points to the search toolbar; 5 points to the settings gear icon; 6 points to the 'ACTION(S)' drop-down menu; 7 points to the search drop-downs; 8 points to a column header; 9 points to a contact record; and 10 points to an account record.

	First	Last	Title	Company	Email	Office	Cell	Fax
<input type="checkbox"/>	Ace	Custodio	Copy Room Manager	Plexus Scientific 4501 Ford Avenue Suite 1200 Alexandria, VA 22302	support@saleschain.com	7038458492		
<input type="checkbox"/>	Ada	DiMichele		Chevy Chase Club 6100 Connecticut Avenue Chevy Chase, MD 20815	support@saleschain.com	3016524100		
<input type="checkbox"/>	Adair	Hocking		Charles County Government P.O. Box 2150 La Plata, MD 20646	support@saleschain.com	3016450546		
<input type="checkbox"/>	Adam			Interface Media Group 1233 20th Street, NW Washington, DC 20036	support@saleschain.com	2028610500		2027855372
<input type="checkbox"/>	Adam	Antol	CFO	Walgreen Co.		(847) 940-2500		
<input type="checkbox"/>	Adam	Babok	CTO	Firestone Bldg. Prods Inc. 250 W 96th St Ste 150 PO Box 547 Indianapolis, IN 46260		(317) 575-7000		
<input type="checkbox"/>	Adam	Cho	IT Manager	The Staubach Co. - Northeast Inc. 8484 Westpark Drive; Suite 150 Mc Lean, VA 22102	support@saleschain.com	2026394522		7034486685
<input type="checkbox"/>	Adam	Damili	PRTNR	Adams Street Prtnr. LLC		(312) 578-0415		
<input type="checkbox"/>	Adam	Greenburg		Restaurants Zone (Potomac Pizza) 10220 River Road Potomac, MD 20854	support@saleschain.com	3019839700		
<input type="checkbox"/>	Adam	Grinde	CFO	Fremont Sch. Dist. 79 Ed Fndtn		(847) 566-0169		
<input type="checkbox"/>	Adam	Huang		Caliber Collision Ctr Chantilly, VA 20151	support@saleschain.com	(410) 987-4321		
<input type="checkbox"/>	Adam	Lombardo	OWNER	Lombardo Law Office		(414) 543-3328		
<input type="checkbox"/>	Adam	Moore		Spangler Jennings & Dougherty		(219) 769-2323		
<input type="checkbox"/>	Adam	Portant		Madison Community Coop		(608) 251-2667		
<input type="checkbox"/>	Adam	Sanders		Cherrydale Baptist Church 3910 Lorcom Ln Arlington, VA 22207	support@saleschain.com	(703) 525-8210		
<input type="checkbox"/>	Adam	Smith	Administrative Assistant	Core States Engineering 731 Eldon Street Herndon, VA 20170	support@saleschain.com	7037960700		7037963538
<input type="checkbox"/>	Adam	Tenner	Executive Director	Metro TeenAids 651 Pennsylvania Avenue SE Washington, DC 20003	support@saleschain.com	2025439355		2025433343

Clicking on any contact will bring you to the corresponding contact view.

*\*See Page 44 for more information regarding the icons in the contact view.*

## Key:

- 1) Navigation tree
- 2) Action and Activity Icons
- 3) HubSpot Sync indicator and link to corresponding HubSpot contact
- 4) General contact information
- 5) Quick entry dialogue
- 6) Action and activity history

Home > Account -> CONTACT

HubSpot(YES)

Name: **Adam Wyse** (Hubspot)

Department: SalesChain ID: **7601**

Title: **Supply Buyer** Held Since:

Reports To: Ref By:

Account Name: **Grantham Education Corporation (formerly Level Playing Field)** eAuto#: **Grantham/Arlington**

eMail: [support@saleschain.com](mailto:support@saleschain.com) Birthday:

Office Phone#: **(703) 778-8500 ext:521** Home Phone:

Toll Free#: OK To: PH ☐ FX ☐ EM ☐ ML ☐

Office Fax#: Home Fax:

Office Addr: **2101 Wilson Boulevard Suite 110 Arlington, VA 22201** [map](#) Home Addr:

Mobile#: Pager#:













Assistant: Spouse:

Date Created: Last Modified:

Quick Entry:  [cal](#) [zoom](#)

Hist		Grp	WF	ALL
ALL	Notes	Appointments	Tasks	Email Documents System
TYPE	OBJECT	ON-DATE	ACTIVITY	USER
	Adam Wyse	12/08/2021 2:40PM	Note: Not avail on Fridays	Corbit, G
	Adam Wyse	12/08/2021	RE: Follow up re: Demo	Corbit, G



## Action Icons in the Contact View

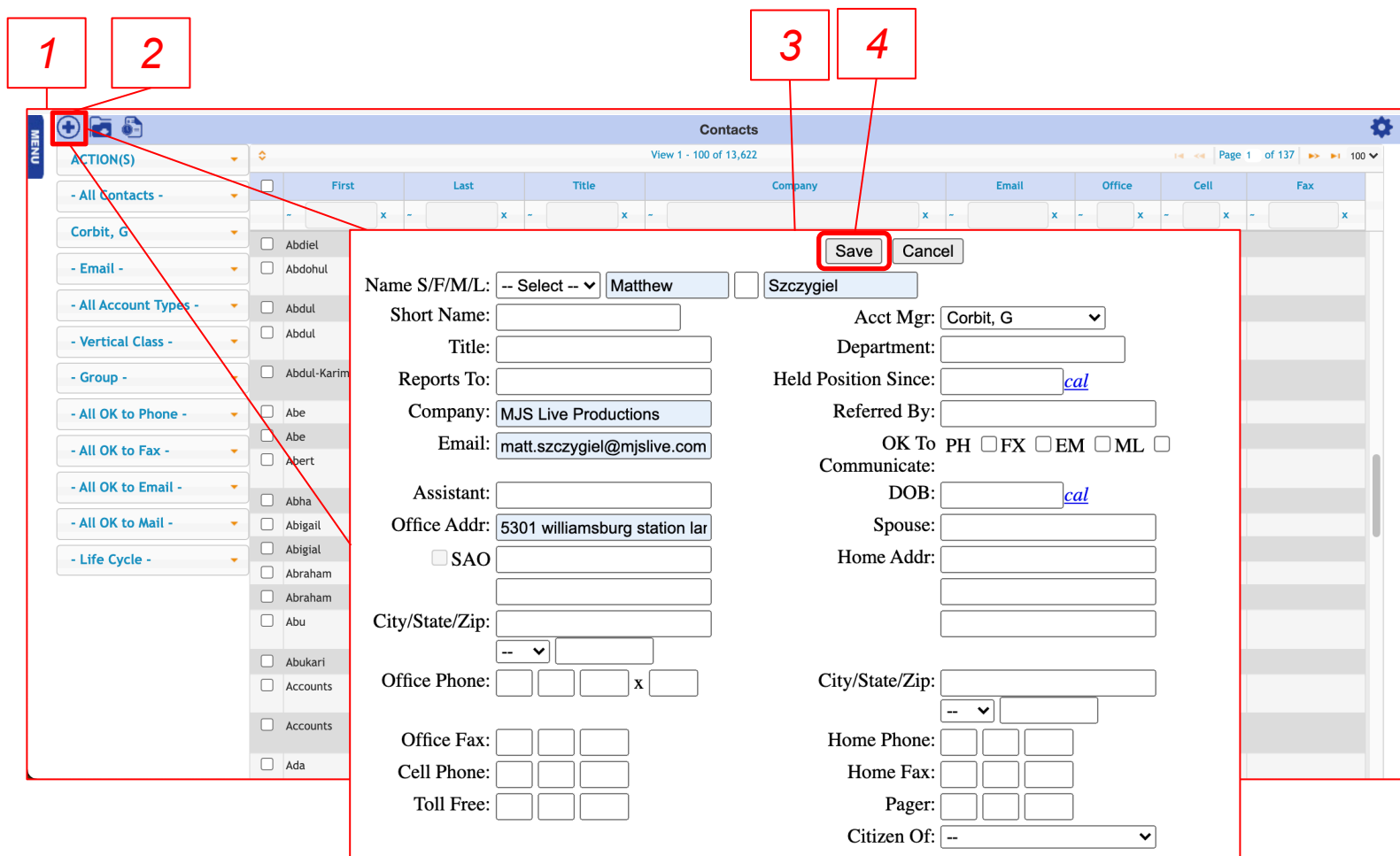
Icon	Associated Action
	Edit this contact
	Clone this contact
	Delete this contact (permission pending)
	Attach a document to this contact
	Generate a document for this contact
	Add a new note to this contact
	Add a task to this contact
	Schedule an appointment with this contact
	Send an email to this contact
	Create a new contact at this contact's account
	Change this contact's account association
	Merge this contact into another

## How To: Create a New Contact

It is possible to create contacts with no account association.

To add a new contact:

1. Navigate to the Contacts Desk by clicking on the contacts icon  OR via *Menu Sidebar > Accounts and Activity > Contacts*
2. Click on the *New Contact* Icon 
3. Enter your new contact's information
4. Click Save



The screenshot shows the 'Contacts' desk interface. On the left is a menu sidebar with various filters. The main area displays a table of contacts. A modal form for creating a new contact is open, with fields for personal and professional information. Red boxes and numbers 1-4 highlight the steps: 1. New Contact icon, 2. Menu sidebar, 3. Save button, 4. Cancel button.

**1** **2** **3** **4**

**Contacts**  
View 1 - 100 of 13,622

Page 1 of 137

**Save** **Cancel**

Name S/F/M/L: -- Select -- Matthew Szczygiel

Short Name:

Title:

Reports To:

Company: MJS Live Productions

Email: matt.szczygiel@mjslive.com

Assistant:

Office Addr: 5301 williamsburg station lar

☐ SAO

City/State/Zip:

Office Phone:    x

Office Fax:

Cell Phone:

Toll Free:

Acct Mgr: Corbit, G

Department:

Held Position Since:  cal

Referred By:

OK To PH ☐ FX ☐ EM ☐ ML ☐

Communicate:

DOB:  cal

Spouse:

Home Addr:

City/State/Zip:

Home Phone:

Home Fax:

Pager:



Citizen Of: --

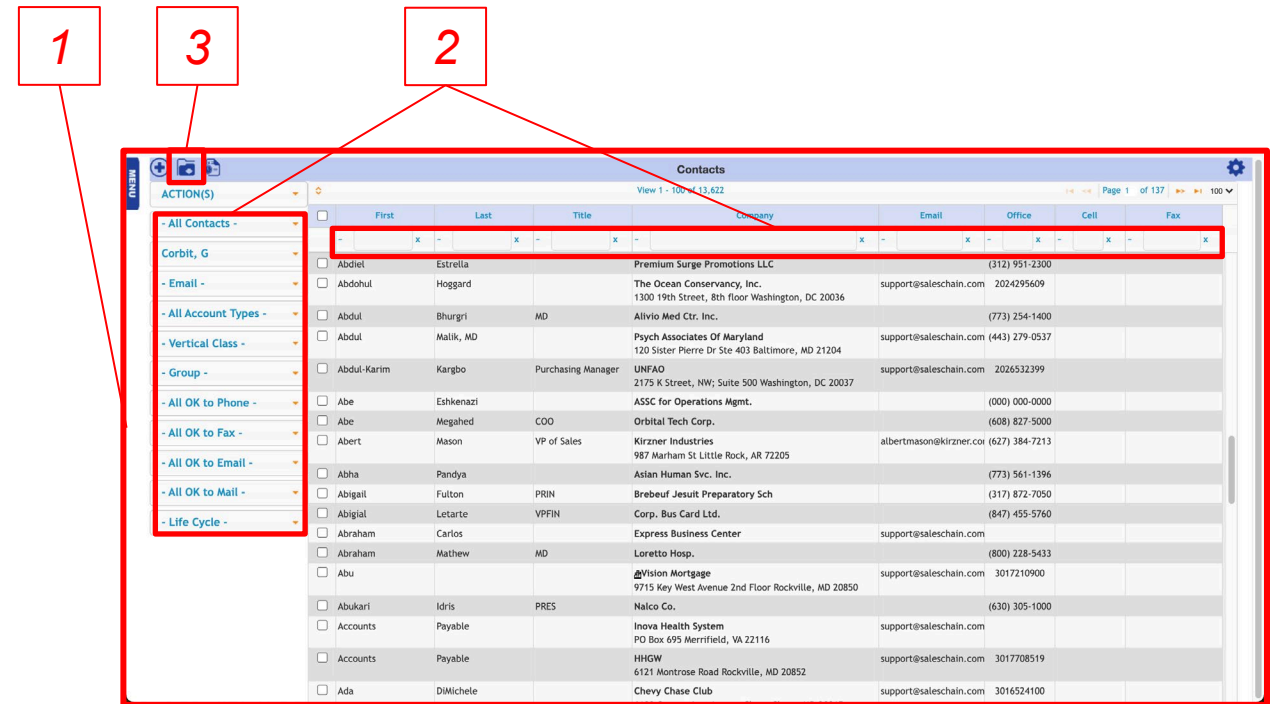
## How To: Export a List of Contacts

It is possible for certain users to export a list of contacts in a .csv format. The list of contacts that is exported will match your search criteria at the time of export.

*NOTE: This action is only permission pending, and only available to users who have been provided with the permission to export data.*


To export a list of contacts:

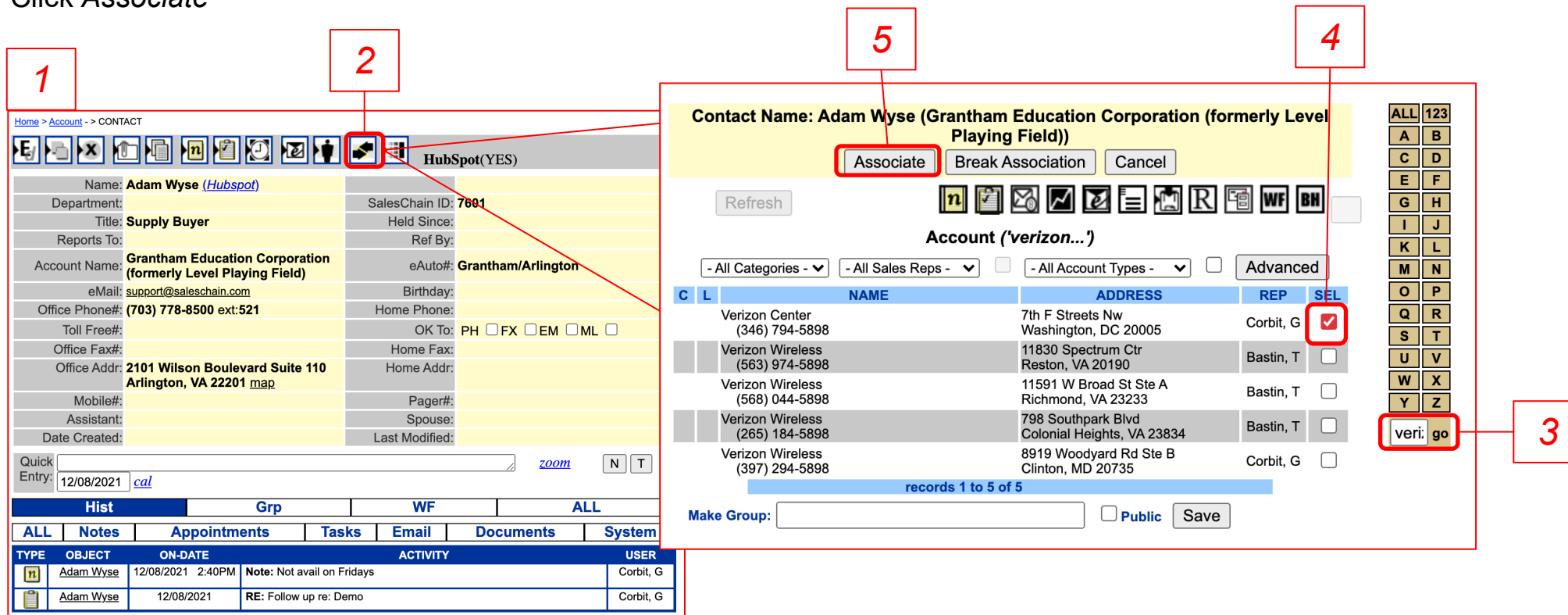
1. Navigate to the Contacts Desk by clicking on the contacts icon  OR via: *Menu Sidebar > Accounts and Activity > Contacts*
2. Perform a contact search using your desired criteria.
3. Click on the *export* icon 



## How To: Move a Contact From One Account to Another

If a contact moves from one known account to another, it is possible to change their account association in SalesChain.

1. Navigate to the contact whose association you would like to modify.
2. Click on the *Change Association* Icon 
3. Search for the account you would like to associate this contact with.
4. Check the box next to the account you would like to associate this contact with.
5. Click *Associate*



**1**

Home > Account -> CONTACT

HubSpot(YES)

Name: Adam Wyse (HubSpot)

Department: Supply Buyer

Account Name: Grantham Education Corporation (formerly Level Playing Field)

eMail: support@saleschain.com

Office Phone#: (703) 778-8500 ext:521

Office Fax#: 2101 Wilson Boulevard Suite 110 Arlington, VA 22201 map

Mobile#:

Assistant:

Date Created: 12/08/2021

Quick Entry: 12/08/2021 cal

**2**

**5**

Contact Name: Adam Wyse (Grantham Education Corporation (formerly Level Playing Field))

Associate Break Association Cancel

Refresh

Account ('verizon...')

- All Categories - - All Sales Reps - - All Account Types - Advanced

C	L	NAME	ADDRESS	REP	SEL
		Verizon Center (346) 794-5898	7th F Streets Nw Washington, DC 20005	Corbit, G	<input checked="" type="checkbox"/>
		Verizon Wireless (563) 974-5898	11830 Spectrum Ctr Reston, VA 20190	Bastin, T	<input type="checkbox"/>
		Verizon Wireless (568) 044-5898	11591 W Broad St Ste A Richmond, VA 23233	Bastin, T	<input type="checkbox"/>
		Verizon Wireless (265) 184-5898	798 Southpark Blvd Colonial Heights, VA 23834	Bastin, T	<input type="checkbox"/>
		Verizon Wireless (397) 294-5898	8919 Woodyard Rd Ste B Clinton, MD 20735	Corbit, G	<input type="checkbox"/>

records 1 to 5 of 5

Make Group: Public Save

**3**

ALL 123

A B

C D

E F

G H

I J

K L

M N

O P

Q R

S T

U V

W X

Y Z

veri: go


**4**

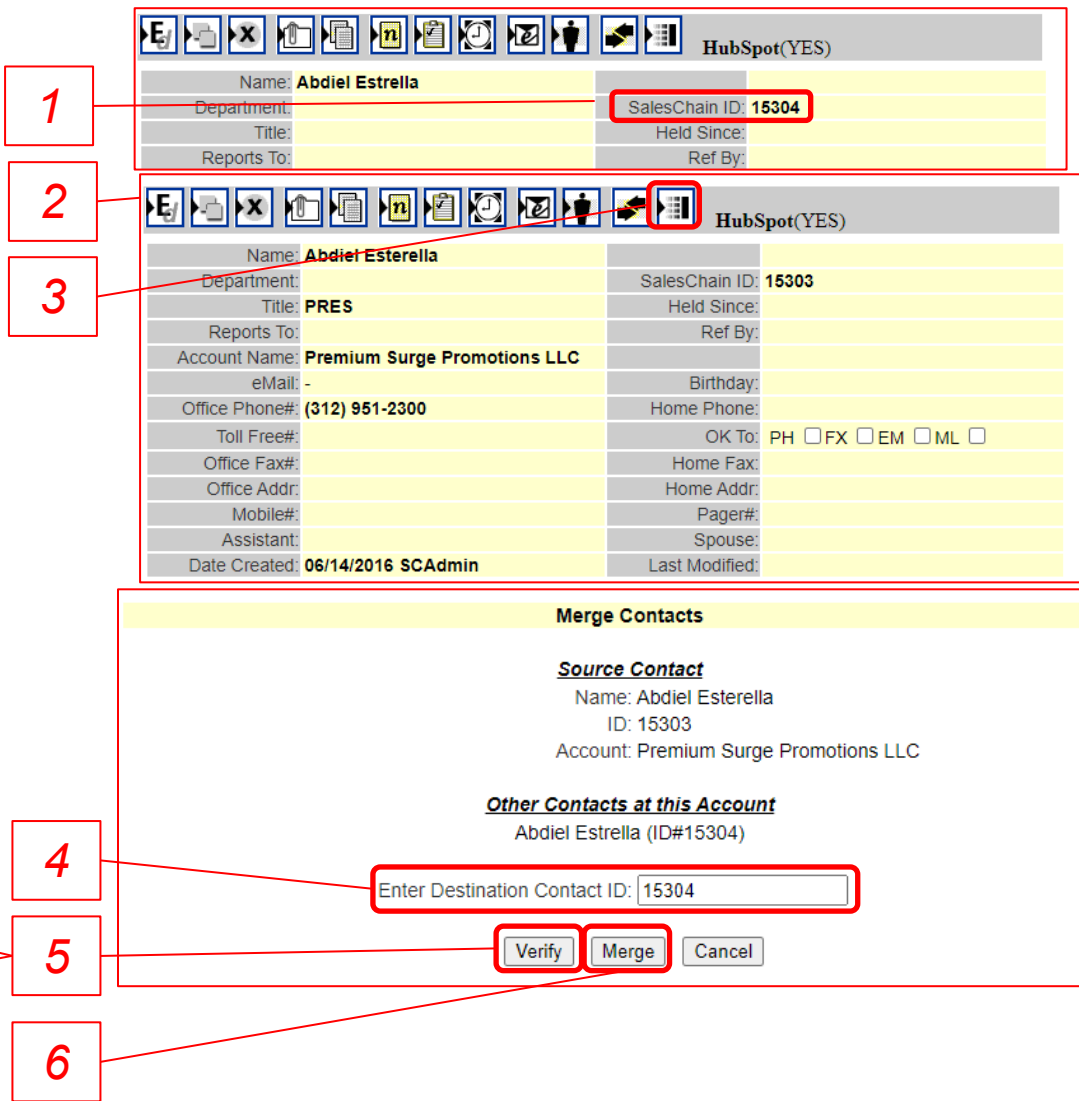
TYPE	OBJECT	ON-DATE	ACTIVITY	USER
11	Adam Wyse	12/08/2021 2:40PM	Note: Not avail on Fridays	Corbit, G
11	Adam Wyse	12/08/2021	RE: Follow up re: Demo	Corbit, G

## How To: Merge Contacts

It is possible to merge contacts together in SalesChain if duplicates exist or information needs to be aggregated.

To merge Contacts:

1. Acquire the SalesChain ID from the **target** contact
2. Navigate to the **source** contact
3. Click on the *merge contacts* icon 
4. Enter the **target** contact's SalesChain ID
5. Recommended: Click *Verify* & ensure the name that pops up is the target contact you expect.
6. Click *Merge*



**1** Target Contact Details:

HubSpot(YES)	
Name: Abdiel Estrella	SalesChain ID: 15304
Department:	Held Since:
Title:	Ref By:
Reports To:	

**2** Source Contact Details:

HubSpot(YES)	
Name: Abdiel Esterella	SalesChain ID: 15303
Department:	Held Since:
Title: PRES	Ref By:
Reports To:	
Account Name: Premium Surge Promotions LLC	Birthday:
eMail: -	Home Phone:
Office Phone#: (312) 951-2300	OK To: PH <input type="checkbox"/> FX <input type="checkbox"/> EM <input type="checkbox"/> ML <input type="checkbox"/>
Toll Free#:	Home Fax:
Office Fax#:	Home Addr:
Office Addr:	Pager#:
Mobile#:	Spouse:
Assistant:	Last Modified:
Date Created: 06/14/2016 SCAAdmin	

**3** Merge Contacts

**4** Enter Destination Contact ID: 15304

**5** Verify

**6** Merge

www.mysaleschain.com says  
Abdiel Estrella

OK

3

## Actions, Activities and Appointments:

Tracking activities, maintaining schedules, and taking user actions within the SalesChain system.



The schedule desk can be used to create, track and manage your appointments. Your schedule can sync with Microsoft Outlook 365. The schedule desk is the default screen that opens when you log into the SalesChain system.

To view the schedule desk:

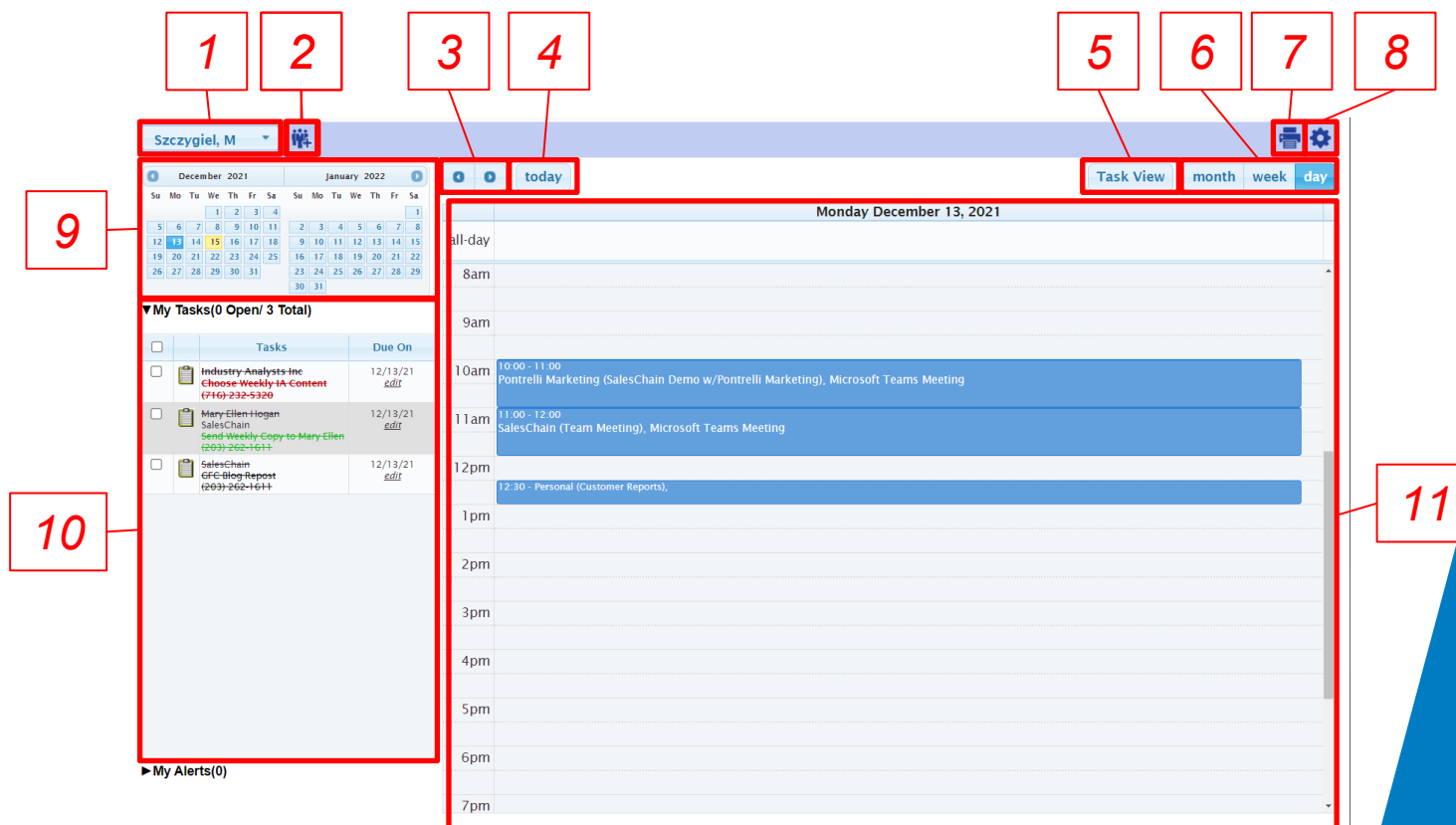
- Click on the schedule icon 
- OR Navigate to: *Menu Sidebar > Accounts and Activity > Schedule*

## Key:

- 1) User selection for whose schedule you're viewing
- 2) Add another user's schedule to the current view
- 3) Navigate forward or backward
- 4) Jump back to the current date
- 5) Go to the task view (See page 52)
- 6) Select daily weekly or monthly view
- 7) Print this report
- 8) Save the current view as your default (daily, weekly or monthly)
- 9) Date selection. *Note: Today shows up in yellow, the selected day shows up in dark blue*
- 10) Task sidebar (See Page 51)
- 11) Main schedule view

## Quick Tip:

If you're in the week or month view and wish to take a closer look at a specific day, double click on that day.



The screenshot shows the SalesChain Schedule Desk interface. The top bar includes a user selection dropdown (1), a plus icon to add users (2), navigation arrows (3), a 'today' button (4), and view toggles for Task View (5), month (6), week (7), and day (8). Below the top bar is a calendar grid (9) showing December 2021 and January 2022. The main area displays a detailed view for Monday, December 13, 2021, with a time slot from 8am to 7pm. The task sidebar (10) on the left lists tasks with checkboxes and due dates. The main schedule view (11) shows appointments as blue bars with details like 'Pontrelli Marketing (SalesChain Demo w/ Pontrelli Marketing), Microsoft Teams Meeting'.

## Schedule Desk: The Task Sidebar

The task sidebar allows you to view, edit and act on tasks individually or in bulk right from the schedule desk.

*Note: The task sidebar displays tasks only for the selected day and for days previous, in other words: your outstanding tasks. To see tasks for days in the future, navigate forward to those days.*

[View a tutorial Video Here](#)

### Key:

- 1) Select multiple tasks for bulk actions. When you select a task, the action drop-down (#4) will appear)
- 2) Click on any icon next to a task to begin a task action (See Page 63-64)
- 3) Task Summary. Click on the name of the associated account to be taken to its account view (See Page 22)
- 4) The action drop down allows you to take bulk action on the selected tasks including reassigning them, changing their due date, and changing their completion status
- 5) Click *edit* next to any task to make changes to its assignment, instructions, activity type and more.

The screenshot shows the 'My Tasks' sidebar with the following components highlighted by numbered callouts:

- 1**: A red box highlights the first column containing checkboxes for selecting tasks.
- 2**: A red box highlights the second column containing icons (document, 3D) for task actions.
- 3**: A red box highlights the third column containing task details and account names.
- 4**: A red box highlights the top right corner containing a dropdown menu labeled '-Select -'.
- 5**: A red box highlights the 'edit' link next to the first task's due date.

Tasks	Due On
*M & M Welding Fabricators Touch Base Re Lease Expiry (301) 948-9330	11/16/21 <a href="#">edit</a>
*Mantech International Corporation Touch Base Re Lease Expiry (703) 218-6442	11/16/21 <a href="#">edit</a>
*Loaner Equipment edafghndfg	12/16/21 <a href="#">edit</a>
1722 Eye Street Assoc No answer time for a visit (256) 194 5898	12/16/21 <a href="#">edit</a>

## Schedule Desk: Task View

The task view displays a comprehensive list of all tasks that you have access to within the system.

To see the task view:

- Click on *task view* in the Schedule Desk (Shown Right)
- OR Navigate to: *Menu Sidebar > Accounts and Activity > Tasks*

### Key:

- 1) Create a new task (See Pages 53-55)
- 2) Refresh your search for tasks
- 3) Show and hide task details
- 4) Show and hide overdue tasks
- 5) Click on any task's icon to begin a task action
- 6) Click on any task's associated account to jump to its account view (See Page 22)
- 7) Filter the tasks displayed
- 8) Sort tasks by any category in the column headers using the up and down arrows.

The screenshot shows the 'Tasks and Schedule Activities' interface. At the top right, a 'Task View' button is highlighted with a red box and callout 1. Below it, a date filter 'Wednesday July 12, 2017' is shown. The main table has columns: SUBJECT, PRI, REGARDING, CREATOR, OWNER, DUE, and STATUS. Callout 2 points to a 'New' button, callout 3 to a 'Refresh' button, callout 4 to a '+D' button, and callout 5 to a task icon. Callout 6 points to a task's associated account 'Saleschain Llc'. Callout 7 points to a filter dropdown, and callout 8 points to a column header sort arrow.


SUBJECT	PRI	REGARDING	CREATOR	OWNER	DUE	STATUS
*Loaner Equipment	L	sdfghsdg	Corbit, G	Corbit, G	12/16/21	Complete
1722 Eye Street Assoc (256) 194-5898	L	No answer time for a visit	Corbit, G	Corbit, G	12/16/21	Complete
Adam Wyse Grantham Education Corporation (formerly Level Playing Field) (703) 778-8500	L	Follow up re: Demo	Corbit, G	Corbit, G	12/08/21	Complete
Saleschain Llc (203) 262-1611	L	Need to do more research	Davis, M	Davis, M	11/25/21	Open
Gold's Gym (123) 665-4821	H	Set Demo date with matt	Corbit, G	Corbit, G	11/19/21	Complete
Gold's Gym (123) 665-4821	L	Call Matt Re: Demo	Corbit, G	Corbit, G	11/17/21	Complete
Mantech Aegis Research Corp (703) 610-9294	H	Touch Base Re Comp Eq	Corbit, G	Bastin, T	11/16/21	Open
*Mantech International Corporation (703) 218-6442	H	Touch Base Re Comp Eq	Corbit, G	Corbit, G	11/16/21	Complete
ManTech International Corp / Systems Engineering (202) 863-9133	H	Touch Base Re Comp Eq	Corbit, G	Corbit, G	11/16/21	Complete
*Mitre Corporation (703) 983-7493	M	Touch Base Re Lease Expiry	Corbit, G	O'Mara, J	11/16/21	Open
*Millennium Capital / First Trust National Mortgage (203) 910-7165	M	Touch Base Re Lease Expiry	Corbit, G	O'Mara, J	11/16/21	Open
*Mantech International Corporation (703) 218-6442	M	Touch Base Re Lease Expiry	Corbit, G	Corbit, G	11/16/21	Open
*M & M Welding Fabricators (301) 948-9330	M	Touch Base Re Lease Expiry	Corbit, G	Corbit, G	11/16/21	Open
MJS Live Productions (555) 555-5555	L	Call matt set up demo	Corbit, G	Corbit, G	11/15/21	Complete
Matt Sijel Gold's Gym (123) 665-4821	L	Send Brochure to Matt	Corbit, G	Corbit, G	11/15/21	Complete

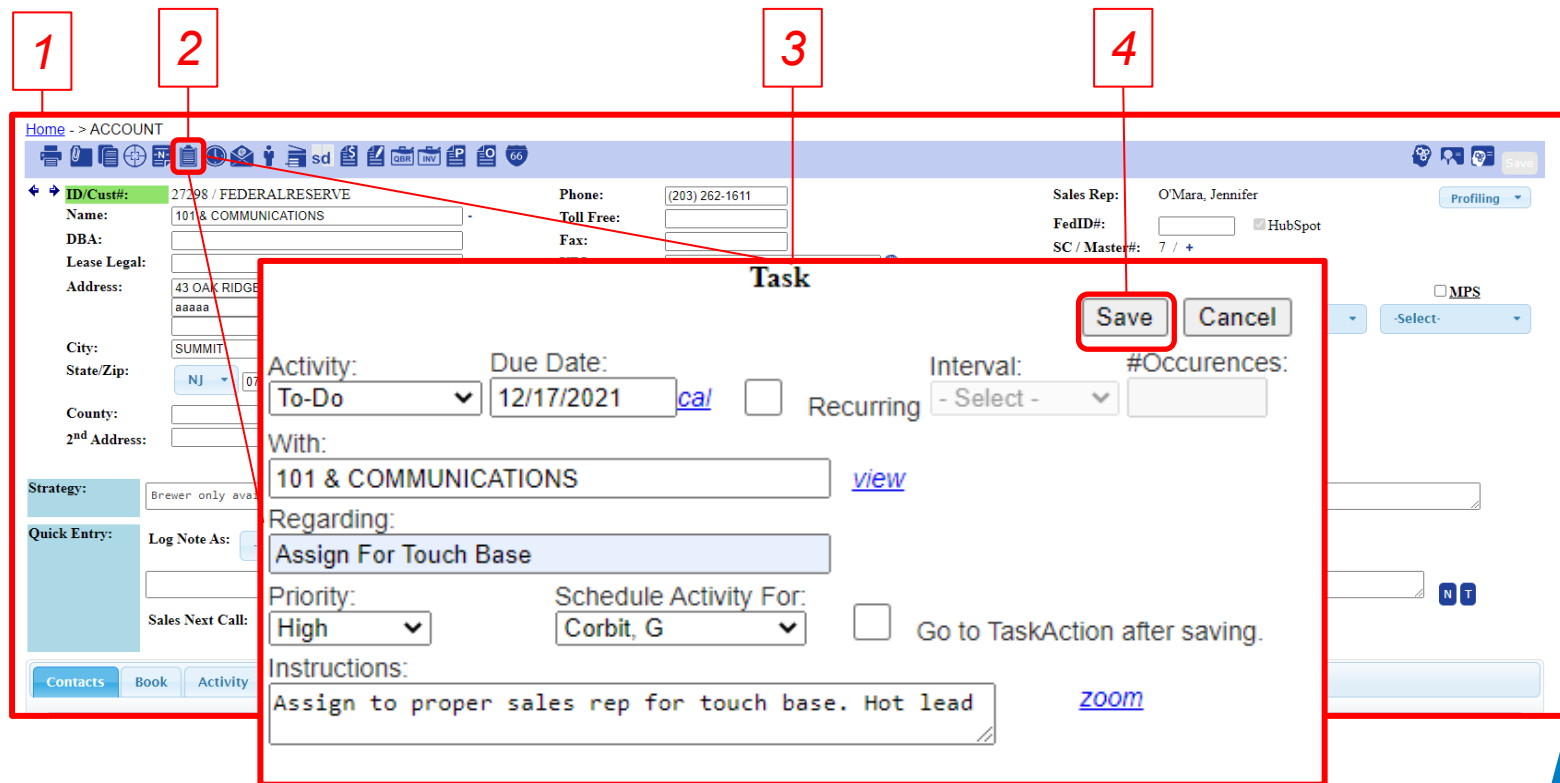
## How To: Create a New Task From the Account View

It is possible to create tasks related to accounts directly from the account view.

[View a video tutorial](#)

To Create a Task:

1. Navigate to the account to which you would like to add an activity (See Page 22)
2. Click on the *new task* icon 
3. Enter task information
4. Click Save



The screenshot shows the 'ACCOUNT' view for '101 & COMMUNICATIONS'. A 'Task' modal is open, allowing the user to create a new task. The modal includes fields for Activity (To-Do), Due Date (12/17/2021), Interval (Select), and #Occurrences. The 'With' field is set to '101 & COMMUNICATIONS'. The 'Regarding' field is set to 'Assign For Touch Base'. The 'Priority' is set to 'High' and 'Schedule Activity For' is set to 'Corbit, G'. The 'Instructions' field contains 'Assign to proper sales rep for touch base. Hot lead'. The 'Save' button is highlighted with a red box and the number 4.

### Quick Tip:

Check the box next to *Go To Task Action after saving* to jump directly to completing this task.

## How To: Create a New Task From the Task View

It is possible to create tasks with no account association from the task view.

[View a video tutorial](#)

To Create a Task:

1. Navigate to the task view ([See Page 52](#))
2. Click on the *New* button
3. Enter task information
4. Click Save

The screenshot shows the 'Task View' interface. On the left is a sidebar menu with 'Tasks' highlighted. The main area is titled 'Tasks and Schedule Activities' and contains a 'New' button. Below this is a table of tasks. A modal form titled 'Task' is open, showing fields for Activity, Due Date, Interval, #Occurrences, With, Regarding, Priority, Schedule Activity For, and Instructions. The 'Save' button is at the bottom right of the modal.

SUBJECT	PRI	REGARDING	CREATOR	OWNER	DUE	STATUS
Leaser Equipment	L	sdaighsdfg	Corbit, G	Corbit, G	12/16/21	Complete

SUBJECT	PRI	REGARDING	CREATOR	OWNER	DUE	STATUS
*M & M Welding Fabricators (301) 948-9330	M	Touch Base Re Lease Expiry	Corbit, G	Corbit, G	11/16/21	Open
MJS Live Productions (555) 555-5555	L	Call matt set up demo	Corbit, G	Corbit, G	11/15/21	Complete
Matt Sijel Gold's Gym (123) 665-4821	L	Send Brochure to Matt	Corbit, G	Corbit, G	11/15/21	Complete

### Quick Tip:

Tasks created from the task view will be created without an account association.

## How To: Create a Recurring Task

It is possible to create tasks with a recurrence from any of the places in SalesChain where you might create a task.

To create a recurring task:


1. Begin creating a task using steps 1-3 outlined on [page 54](#)
2. Check the box next to *Recurring*
3. Select an interval of time and the number of occurrences
4. Click Save

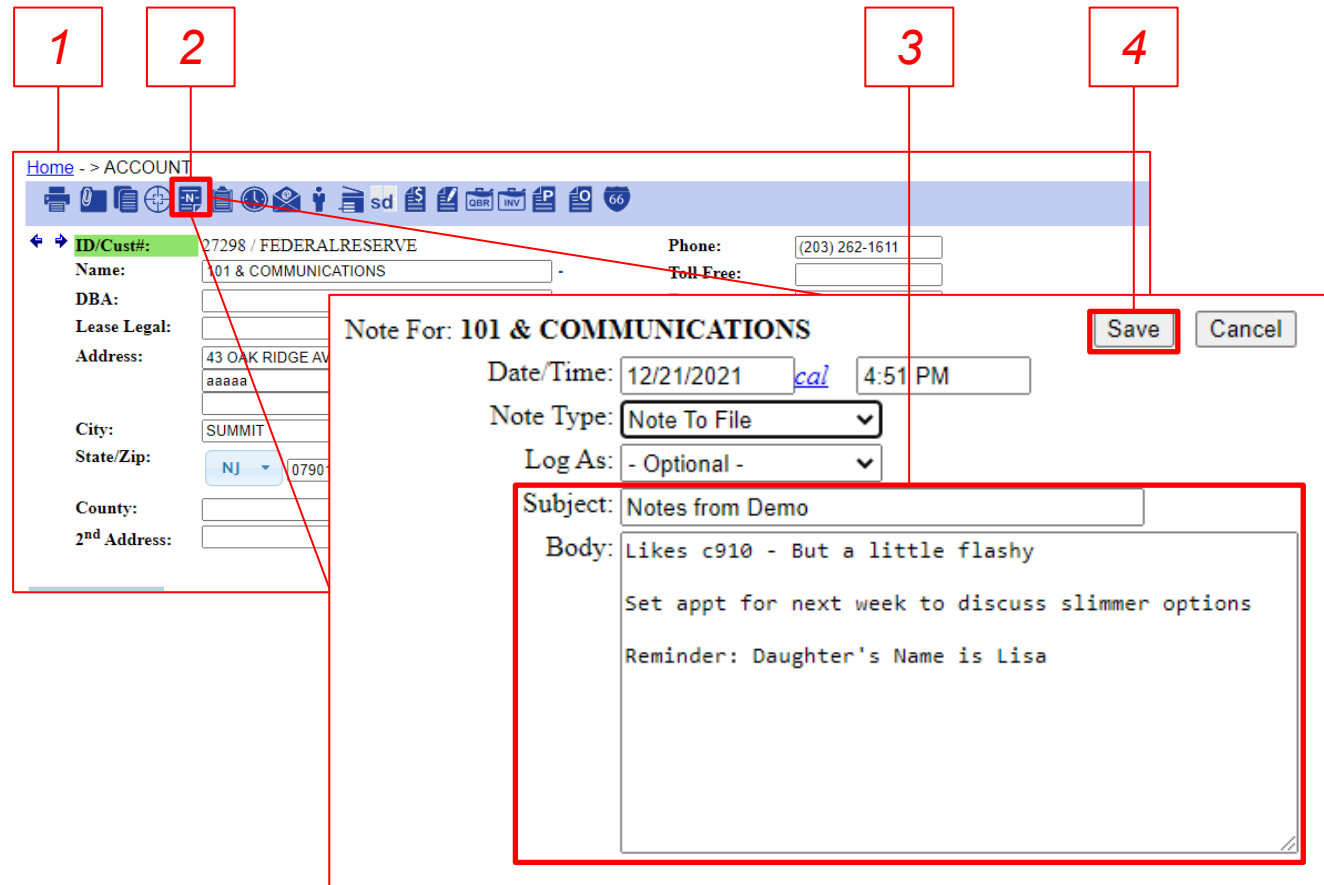
The screenshot shows the 'Tasks and Schedule Activities' interface. A 'Task' modal is open, and a red box highlights the recurrence settings. The modal includes fields for 'Activity' (To-Do), 'Due Date' (12/21/2021), 'With' (101 & COMMUNICATIONS), 'Regarding' (Quarterly Touch-Base), 'Priority' (Low), and 'Schedule Activity For' (Corbit, G). The 'Recurring' checkbox is checked. The 'Interval' dropdown is open, showing options: - Select -, Day(M-F), Week, -Monday, -Tuesday, -Wednesday, -Thursday, -Friday, Month, Bi-Monthly, **Quarter**, 4-Months, Semi-Annual, and Year. The '#Occurrences' field is set to 12. The 'Save' button is highlighted with a red box. The background shows a list of tasks and a sidebar with user avatars.

## How To: Add a Note to An Account

It is possible to create notes associated with any account within the SalesChain system. Notes are text records for reference by you and other users.

To add a note to an account:

1. Navigate to the account to which you would like to add a note
2. Click on the *new note* icon 
3. Enter the contents of your note using the *Subject* and *Body* fields
4. Click *Save*



The screenshot shows the SalesChain interface. On the left, the 'ACCOUNT' page displays details for '101 & COMMUNICATIONS'. On the right, the 'Note For: 101 & COMMUNICATIONS' form is open. The form includes fields for Date/Time (12/21/2021 4:51 PM), Note Type (Note To File), Log As (- Optional -), Subject (Notes from Demo), and Body (Likes c910 - But a little flashy, Set appt for next week to discuss slimmer options, Reminder: Daughter's Name is Lisa). A 'Save' button is highlighted with a red box and the number 4.

### Quick Tip:

Notes can be viewed and edited under the *Activity* tab of any account.

## How To: Create Quick Tasks and Quick Notes

The **Quick Entry** box in the profiling account view makes it possible to quickly add notes and tasks to that account without clicking on the icons in the top bar.

[View a tutorial video here.](#)

To use the quick entry dialogue:

1. Navigate to the account to which you would like to add a note or task.
2. Enter the Task or Note information including action type under the *log note as* drop down
3. Click *N* to save this as a note or *T* to save this as a task

The screenshot shows the SalesChain account profiling interface. On the left, a sidebar lists accounts. The main area displays account details for '27298 / FEDERA'. A 'Quick Entry' box is overlaid on the account details. This box contains a 'Log Note As' dropdown menu (set to 'Follow Up'), a 'Quick Text' dropdown menu (set to 'Need to follow up'), an 'On' date field (set to '12/22/2021'), and a 'Contact' dropdown menu (set to '- Select -'). Below these fields is a text input area containing 'Need to follow up'. At the bottom right of the 'Quick Entry' box are two buttons labeled 'N' and 'T'. Red boxes and numbers 1, 2, and 3 are used as annotations: 1 points to the account list, 2 points to the 'Quick Entry' box, and 3 points to the 'N' and 'T' buttons.

### Quick Tip:

Use the **Quick Text** drop down to quickly add note or task text that is commonly used for repetitive tasks or notes.

## How To: Add A Sales Next Call Date

The **Quick Entry** section in the profiling account view also includes the sales next call date dialogue. It is possible to have a dedicated task involving the next call date which stands out amongst other tasks and is a searchable field within the system.

To add a sales next call task:

1. Navigate to the account to which you would like to add a note or task.
2. Enter the sales next call task information including a date, details in the *RE:* box, and an objective using the drop-down.
3. Click **C** to save this next call date task.

The screenshot displays the SalesChain system interface. On the left, a sidebar shows account details for '27298 / FEDERALRESERVE'. The main content area features a calendar for February 2022, with the 18th highlighted. Below the calendar, there are tabs for 'Contacts', 'Book', and 'Activity'. The 'Contacts' tab is active, showing a list of contacts with columns for 'Name', 'Phone', 'Fax', 'URL', 'Email', 'SIC Code', 'Vertical', 'Classification', 'Company Type', and 'Sales Contact'. The 'Quick Entry' section at the bottom is highlighted with a red box and labeled '1'. It contains fields for 'Sales Next Call:', 'RE:', and 'Next Call Objective:'. The 'RE:' field is populated with 'First Contact'. The 'Next Call Objective:' dropdown is set to 'Cold Call'. A red box labeled '2' highlights the 'Sales Next Call:' field, which is currently empty. A red box labeled '3' highlights the 'C' button next to the 'Next Call Objective:' dropdown, which is used to save the task.

## How To: Insert Tasks in Bulk

It is possible to add the same task to many accounts at once.

[View a tutorial Video Here](#)

To add tasks in bulk:

1. Navigate to the accounts desk
2. Search for the accounts you would like to add a task to
3. Select the accounts you would like to add this task to using the check boxes
4. Open the *Actions* drop-down and click on *Insert A Task*
5. Enter the desired task information (See Page 53)
6. Click Save

The screenshot shows the 'Accounts' desk interface. A table lists accounts with columns for ID, Cust#, and Name. The 'Actions' dropdown menu is open, showing 'Insert a Task' as the selected option. The 'Task' creation form is displayed, showing '5 Account(s) selected' and various fields for task configuration.

ID	Cust#	Name
27298	FEDERALRESERVE	101 & COMMUNICATIONS
61986		101 North Ripley Apartments
75161		Co 101
29101	Marriott/70.101	Marriott Intl/Dept 70.101.01

**Task Creation Form:**

**CREATE BULK TASKS: 5 Account(s) selected**

Assign Tasks to: Corbit, G

**OR...**

- Select an SRA Category -

Activity: To-Do Due Date: 12/27/2021 Interval: - Select - #Occurrences: -

With: <set to the relative record name>

Regarding: Touch Base

Priority: Low Schedule Activity For: Corbit, G Go to TaskAction after saving.

Instructions: See How Doing [zoom](#)

**Save** **Cancel**

### Quick Tip:

You can assign bulk tasks to the rep assigned to an account rather than assigning them to a specific user. Use the drop down below the word **or** to select which relative user you would like to assign this task to.

Assign Tasks to: - Select A Specific User -

**OR...**

- Select an SRA Category -

Sales Rep

AfterMarket

Production Print

Sales Rep

Support Rep

## How To: Insert Notes in Bulk

It is possible to add the same note to many accounts at once.

[View a tutorial Video Here](#)

To add notes in bulk:

1. Navigate to the accounts desk
2. Search for the accounts you would like to add a note to
3. Select the accounts you would like to add this note to using the check boxes
4. Open the *Actions* drop-down and click on *Insert A Note*
5. Enter the desired note information ([See Page 56](#))
6. Click *Save*

The screenshot shows the Accounts desk interface with a table of accounts. The **ACTION(S)** dropdown is open, and **Insert a Note** is selected. The table has columns for **ID**, **Cust#**, and **Name**. Five accounts are selected, indicated by blue checkmarks in the selection column.

ID	Cust#	Name
27298	FEDERALRESERVE	101 & COMMUNICATIONS
61986		101 North Ripley Apartments
75161		Co 101
29101	Marriott/70.101	Marriott Intl/Dept 70.101.01

The **INSERT NOTE: 5 Account(s) selected** form is displayed with the following fields:

- Date/Time: 12/28/2021 10:39 AM
- Note Type: Note To File
- Log As: - Optional -
- Subject: Target for 2022 Campaign
- Body: This account is a good target for our 2022 Campaign

The **Save** button is highlighted in the bottom right corner of the form.

## How To: Assign A Vertical Class to Accounts in Bulk

It is possible to assign the same vertical class to many accounts at once.

To assign vertical class in bulk:

1. Navigate to the accounts desk
2. Search for the accounts you would like to assign a vertical class to
3. Select the accounts you would like to assign this vertical class to using the check boxes
4. Open the *Actions* drop-down and click on *Vertical Class Assign*
5. Open the –*Vertical Class*- drop-down and select the vertical class you would like to assign to these accounts
6. Click *Assign*

The screenshot shows the Accounts desk interface. A table lists accounts with columns for ID, Cust#, and Name. Several accounts are selected, indicated by blue checkmarks in the first column. A red box highlights the 'Vertical Class Assign' option in the Actions dropdown menu. Another red box highlights the 'Assign' button in the 'Vertical Class Assign' dialog box. The dialog box also shows a dropdown menu for selecting a vertical class, with 'Manufacturing' selected.

ACTION(S)	ID	Cust#	Name
Insert a Note			101
Insert a Task	27298	FEDERALRESERVE	101 & COMMUNICATIONS
Create an Email Campaign	61986		101 North Ripley Apartments
Create a Campaign	75161		Co 101
Download Email Addresses	29101	Marriott/70.101	Marriott Intl/Dept 70.101.01
Download Mailing Labels	33997	Vornado/2101	Vornado/Charles F Smith/2101

### Quick Tip:

Clicking on *Clear* instead of *Assign* in step #6 will remove the vertical class assignments from the selected accounts without assigning them a new one.

## How To: Reassign Accounts To A Different Rep in Bulk

It is possible to assign many accounts to a different sales rep at once.

To assign accounts to a different rep in bulk:

1. Navigate to the accounts desk
2. Search for the accounts you would like to reassign to a different user
3. Select the accounts you would like to reassign to a different user using the check boxes
4. Open the *Actions* drop-down and click on *Reassign Accounts*
5. Using the drop-downs, select the user to whom you would like to reassign these accounts to AND an SRA category
6. (Optional) Check any of these boxes to reassign open leads, tasks or appointments to this new user or to send the assignee an email, a lead or a task to notify them of this assignment
7. Click *Save*

### Quick Tips:

- Checking the *Mark as protected assignments* box prevents these accounts from falling into the automatic assignment rules based on zip code or other territory assignments.

**Account(s)** View 1 - 5 of 5

ACTION(S)	C	L	T	ID	Cust#	Name	
Insert a Note	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	==	x	~ 101	x
Insert a Task	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Create an Email Campaign	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	27298	FEDERALRESERVE	101 & COMMUNICATIONS	43 OAH
Create a Campaign	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	61986		101 North Ripley Apartments	101 N
Download Email Addresses	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Download Mailing Labels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Export Data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
<b>ReAssign Accounts</b>							
Generate Mailing Labels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Assign WorkFlow	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Hide/Unhide	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Create Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Group Assign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Vertical Class Assign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Classification Assign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Master View	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

**Manual Account Reassignment**  
You are about to re-assign 5 account(s).

Reassign Accounts From: *Relative assignment*

**To User:** Doe, John  
**SRA Category:** Sales Rep

☐ Mark as protected assignments

**NOTE:** Selecting reassign leads/tasks/appointments will reassign ALL records on the account - regardless of the previous owner

☐ Reassign Open Leads  
☐ Reassign Open Tasks  
☐ Reassign Future Appointments  
☐ Send Account Assignee a Task  
☐ Send Lead Assignee an Email  
☐ Send Lead Assignee a Task

**Save** **Cancel**

## How To: Complete a Task

To mark a task as completed within the SalesChain system we will perform a **Task Action**.

[View a tutorial Video Here](#)

To complete a task:

1. Click on the icon next to the task you would like to complete. *Note: Icons will vary based upon action type.*
2. Enter Task information including what kind of action you are taking using the Log As drop-down to indicate and any notes
3. Use the **Status** drop-down to mark the task as "complete"
4. Click **Save**


### Quick Tips:

- Task Actions can be started from any screen in which tasks and their respective icons are displayed.
- Use the **Result** Drop down to populate the **Notes** box with quick text suggestions.

▼ My Tasks(3 Open/ 3 Total)

	Tasks	Due On
<input type="checkbox"/>	*US Dept of State Send Brochure (202) 736-7470	12/22/21 <a href="#">edit</a>
<input type="checkbox"/>	*M & M Welding Fabricators Touch Base Re Lease Expiry (301) 948-9330	11/16/21 <a href="#">edit</a>
<input type="checkbox"/>	*Mantech International Corporation Touch Base Re Lease Expiry (703) 218-6442	11/16/21 <a href="#">edit</a>

**Task Action**

**1**  \*US Dept of State (202) 736-7470  
RE: Send Brochure  
BY: Gary Corbit

Due For: 12/22/21

[Instructions:](#)

☐ Create Followup Task after saving.  
☐ Create Followup Appointment after saving.

**2** Log As: Follow Up Result: - Optional -

Taken On: 12/22/2021 [cal](#) Time: 1 : 08 : PM

**3** Status: Complete ☐ Make next attempt on: 12/29/2021 [cal](#)

Notes: Sent c910 Brochure [zoom](#)

☐ Defer To User: - Select User -

**4** [Save](#) [Close](#)

## How To: Complete Tasks in Bulk

It is possible to complete many tasks at once.

[View a tutorial Video Here](#)

To complete tasks in bulk:

1. Navigate to the schedule desk
2. In the task sidebar ([see page 51](#)), select the tasks you would like to complete using the check boxes
3. Open the –Select- drop-down and click on *Change Status*
4. Open second –Select- drop-down and click on *Complete*
5. Click *Save*
6. Click *Ok* in the confirmation dialogue box

The screenshot illustrates the process of completing tasks in bulk. It shows a sidebar titled '▼ My Tasks(4 Open/ 4 Total)' with a list of tasks. Each task has a checkbox in the first column. The second column contains a '-Select-' dropdown menu. The third column contains a 'Complete' dropdown menu. The fourth column contains a 'Save' button. A confirmation dialog box is shown at the bottom right, asking 'Are you sure you want to perform this action?' with 'OK' and 'Cancel' buttons.

Numbered callouts indicate the steps:

1. Checkboxes for task selection.
2. '-Select-' dropdown menu.
3. 'Change Status' option in the first dropdown.
4. 'Complete' option in the second dropdown.
5. 'Save' button.
6. 'OK' button in the confirmation dialog.

### Quick Tip:

You can use this method to change the status of various tasks to *open*, *cancelled* or *hold* as well.

## How To: Reassign Tasks in Bulk

It is possible to reassign multiple tasks to a different user at once.

To reassign tasks in bulk:

1. Navigate to the schedule desk
2. In the task sidebar (see page 51), select the tasks you would like to complete using the check boxes
3. Open the –Select- drop-down and click on *Reassign*
4. Open second –Select- drop-down and select the user to whom you would like to reassign these tasks
5. Click *Save*
6. Click *Ok* In the confirmation dialogue box

The screenshot illustrates the process of bulk reassigning tasks in the SalesChain interface. The task sidebar is titled '▼ My Tasks(4 Open/ 4 Total)'. It contains a list of tasks, each with a checkbox and a description. The tasks are:

- Send Brochure (202) 736-7470
- \*M & M Welding Fab Touch Base Re Lease (301) 948-9330
- \*Mantech International Corporation Touch Base Re Lease (703) 218-6442

The interface shows the following steps:

1. The task sidebar is open.
2. The checkboxes for the tasks are selected.
3. The 'Reassign' button is clicked in the task sidebar.
4. The 'Reassign' dropdown menu is open, showing a list of users. 'Doe, J' is selected.
5. The 'Save' button is clicked.
6. A confirmation dialog box appears, asking 'Are you sure you want to perform this action?'. The 'OK' button is highlighted.

## How To: Change The Due Date of Tasks In Bulk

It is possible to change the due dates of multiple tasks at once.

To change the dates of tasks in bulk:

1. Navigate to the schedule desk
2. In the task sidebar (see page 51), select the tasks you would like to change the due date of using the check boxes
3. Open the –Select– drop-down and click on *Move Date*
4. Click into the text box and select a date from the calendar to which you would like to reassign these tasks
5. Click *Save*
6. Click *Ok* In the confirmation dialogue box

The screenshot displays the 'My Tasks' section with 4 open tasks. The tasks are:

- 1722 Eye Street Assoc Get an appt (256) 194-5898
- \*US Dept of State Send Brochure (202) 736-7470
- \*M & M Welding Fabricators Touch Base Re Lease Expiry (301) 948-9330
- \*Mantech International Corporation Touch Base Re Lease Expiry (703) 218-6442

The interface shows a 'Move Date' dropdown menu, a date input field set to 01/14/2022, and a 'Save' button. A calendar for January 2022 is open, showing the date 14 selected. A confirmation dialog box is displayed at the bottom right, asking 'Are you sure you want to perform this action?' with 'OK' and 'Cancel' buttons.

## How To: Edit a Task From the Schedule Desk

It is possible to make changes to an existing task right from the schedule screen's task sidebar.

[View a tutorial Video Here](#)

To complete a task:

1. Navigate to the schedule desk
2. Click *edit* next to the task you would like to make changes to in the task sidebar ([see page 51](#))
3. Make the desired changes to this task in the task dialogue
4. Click Save

**▼ My Tasks(3 Open/ 3 Total)**

	Tasks	Due On
<input type="checkbox"/>	*US Dept of State Send Brochure (202) 736-7470	12/22/21 <a href="#">edit</a>
<input type="checkbox"/>	*M & M Welding Fabricators Touch Base Re Lease Expiry (301) 948-9330	11/16/21 <a href="#">edit</a>
<input type="checkbox"/>	*Mantech International Corporation Touch Base Re Lease Expiry (703) 218-6442	11/16/21 <a href="#">edit</a>

**Task**

[Save](#) [Cancel](#) [Remove](#)

Activity: Follow-Up Due Date: 12/22/2021 [cal](#) ☐ Recurring Interval: - Select - #Occurrences:

With: \*US Dept of State [view](#)

Regarding: Send Brochure

Priority: Low Schedule Activity For: Corbit, G ☐ Go to TaskAction after saving.

Instructions:  [zoom](#)

Created: 12/22/21 01:06 PM by Corbit, G

### Quick Tips:

To reassign tasks in bulk, [see page 65](#)

## How To: Make a New Appointment From the Account View

It is possible to schedule an appointment with an account right from the account view.

To schedule a new appointment:

1. View the desired account
2. Click the *new appointment* icon. You will be taken to the schedule desk
3. Click and drag to the desired time on the desired day
4. Click the *Schedule Appt* Button
5. Enter appointment details *Note: Be sure to add "Available Contacts" and "Internal Users" on the right if you want to send a notification of this appointment to certain contacts.*
6. Click Save

### Quick Tip:

If you're using Microsoft Outlook 365 Integration, This appointment will sync down into your outlook calendar. See pages 69 – 72.

The screenshot illustrates the process of scheduling an appointment from the account view. The interface is divided into several sections:

- Top Navigation Bar:** Contains icons for various functions. A red box labeled '1' highlights the 'ACCOUNT' icon.
- Account View:** Displays account details for '101 & COMMUNICATIONS'. A red box labeled '2' highlights the 'new appointment' icon (a clock with a plus sign).
- Schedule Desk:** A calendar view for Tuesday, December 28, 2021. A red box labeled '3' highlights the time slot from 8:00 am to 10:00 am.
- Schedule Appt Button:** A red box labeled '4' highlights the 'Schedule Appt' button in the top right corner of the calendar view.
- Schedule an Appointment Modal:** A form for entering appointment details. A red box labeled '5' highlights the form fields. The fields include:
  - All Day:** ☐ **Private:** ☐
  - Start Date:** 12/28/2021 **Time:** 08:00 am
  - End Date:** 12/28/2021 **Time:** 10:00 am
  - With:** 101 & COMMUNICATIONS
  - Subject:** Demo c190
  - Location:** Our Office
  - Details:** Demo at Our office over coffee
  - Recurring:** ☐
  - Log As:** Demo/Presentation
  - Organizer:** Corbit, G
  - Available Contacts:** Smith, Mr. Tim
  - Additional Contacts:** (empty field)
  - Internal Users:** Doe, J
  - Check Availability:** (button)
  - Create Followup Task:** ☐
  - Save:** (button)
  - Cancel:** (button)
- Save Button:** A red box labeled '6' highlights the 'Save' button at the bottom right of the modal.



To begin syncing emails and appointments between SalesChain and Outlook 365, you will need to first enter your Outlook 365 credentials into SalesChain.

*Important: Once you are logged in, SalesChain and Outlook 365 will share appointments (calendar events) automatically. Instructions on pushing emails from Outlook into SalesChain are outlined in the following pages ([71](#) - [72](#))*

[View a Tutorial Video](#)

To Log Into Outlook 365 within SalesChain:

1. Navigate to [www.mysaleschain.com](http://www.mysaleschain.com)
2. If you are not already logged in, you will be prompted to enter your MS 365 credentials after entering your SalesChain login credentials (See [Page 12](#))
3. Click *Submit*

The screenshot shows a web form titled "MS 365 User Credentials" with the instruction: "You must enter your Microsoft Office email and password in order for your appointments to sync with Outlook". The form contains two input fields: "Email Address" (containing "matt.szczygiel@saleschain.com") and "Password" (empty). Below the fields are "Submit" and "Cancel" buttons. Three red callout boxes with numbers are present: Box 1 points to the top of the form; Box 2 points to the Email Address field; Box 3 points to the Submit button.



If your Outlook 365 password has changed, you will need to change it in SalesChain for active sync to continue.

*Note: If SalesChain detects that your Outlook password has changed, you will be prompted to login with the method outlined on [page 69](#).*

To change your Outlook 365 password in SalesChain:

1. Navigate to *Menu -> User Settings -> Change MSO Password*
2. Enter your new Outlook 365 credentials
3. Click *Submit*

The screenshot illustrates the process of changing an Outlook 365 password in SalesChain. It is divided into three numbered steps:

- Step 1:** A red box labeled '1' points to the 'Change MSO Password' option in the 'User Settings' menu. The menu is open, showing various settings like Profile, Preferences, and Favorites. 'Change MSO Password' is highlighted at the bottom.
- Step 2:** A red box labeled '2' points to the 'MS 365 User Credentials' form. The form contains fields for 'Email Address' (pre-filled with 'matt.szczygiel@saleschain.com') and 'Password'. A red box also highlights the 'Submit' and 'Cancel' buttons at the bottom of the form.
- Step 3:** A red box labeled '3' points to the 'Submit' button in the 'MS 365 User Credentials' form.

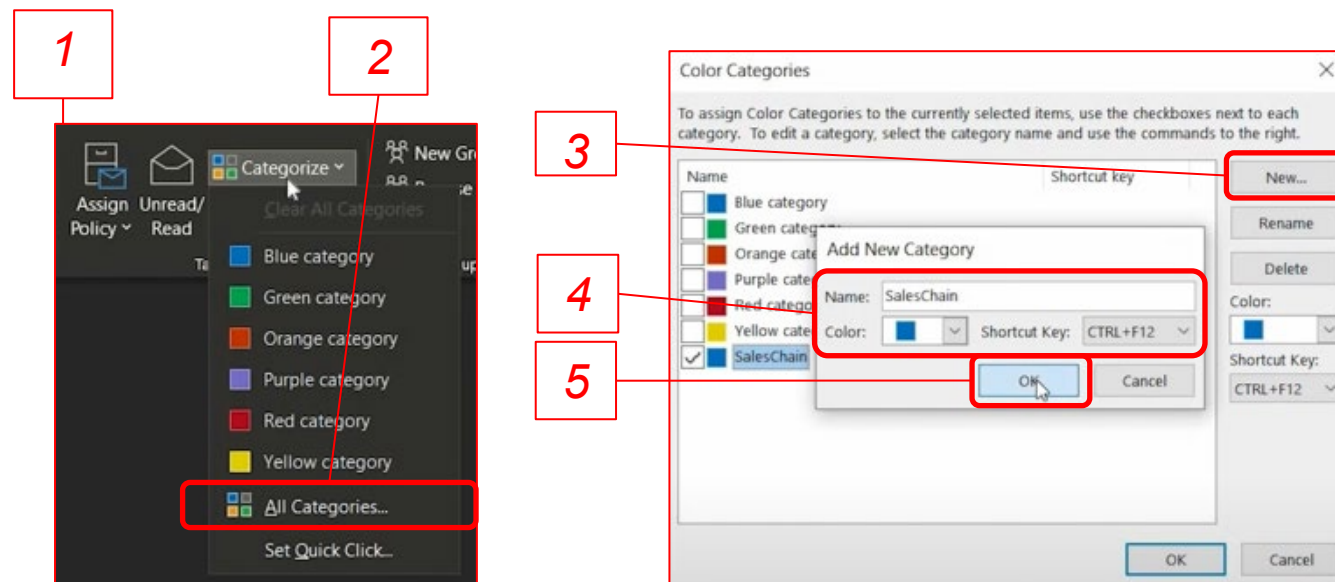


SalesChain pulls in only marked emails to make sure only pertinent information is in the system. You will need to set up a category called *SalesChain* in Outlook, so SalesChain knows what emails to pull in.

[View a Tutorial Video](#)

To set up the SalesChain category in Outlook 365:

1. Open your Outlook 365 desktop application and navigate to the *Home* tab
2. Under the categorize dropdown, select *All Categories...*
3. In the pop-up dialogue, click *New...*
4. Under *Name*, title your new category “*SalesChain*” and assign it a color of your choice (blue in this case) and assign it a shortcut Key (CTRL+f12 recommended)
5. Click *OK*



## Quick Tip:

Any email marked with this category will be brought into SalesChain under the appropriate account's *Activity* Tab assuming the contact to whom you sent it is listed in the SalesChain system. See [Page 72](#) for instructions.



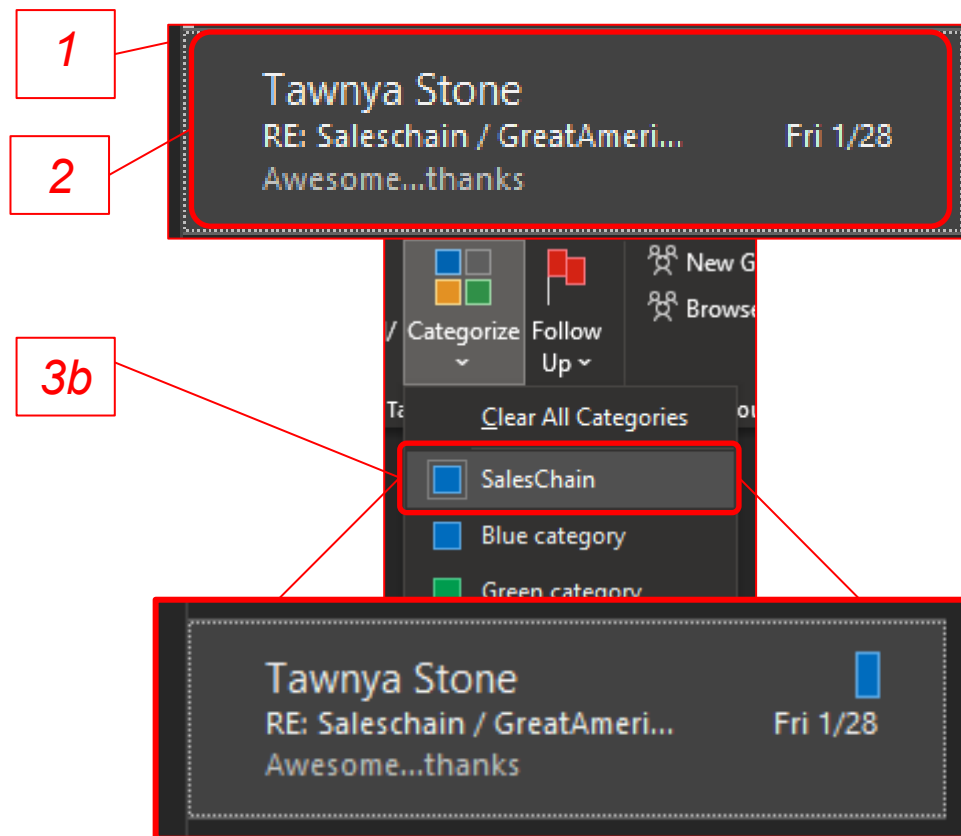
Not all Outlook emails are automatically pushed into the SalesChain system. You can choose which to push by marking them with a category in Outlook. When you do, they will automatically be associated with an account, with a contact within that account, and will be logged in your user activity.

[View a Tutorial Video](#)

To push emails from Outlook into SalesChain:


1. Open your Outlook 365 desktop or web application
2. Click on an email within Outlook 365 to select it.
3. a) Hit the shortcut key you set up in the manner instructed on [page 71](#) **OR** b) under the *Categorize* drop-down select the *SalesChain* category you created in the manner instructed on [page 71](#)

\*\* This email will be marked with the appropriately colored tag and will be pushed into SalesChain within 5 minutes \*\*



It is possible to send emails directly to your contacts from inside the SalesChain platform.

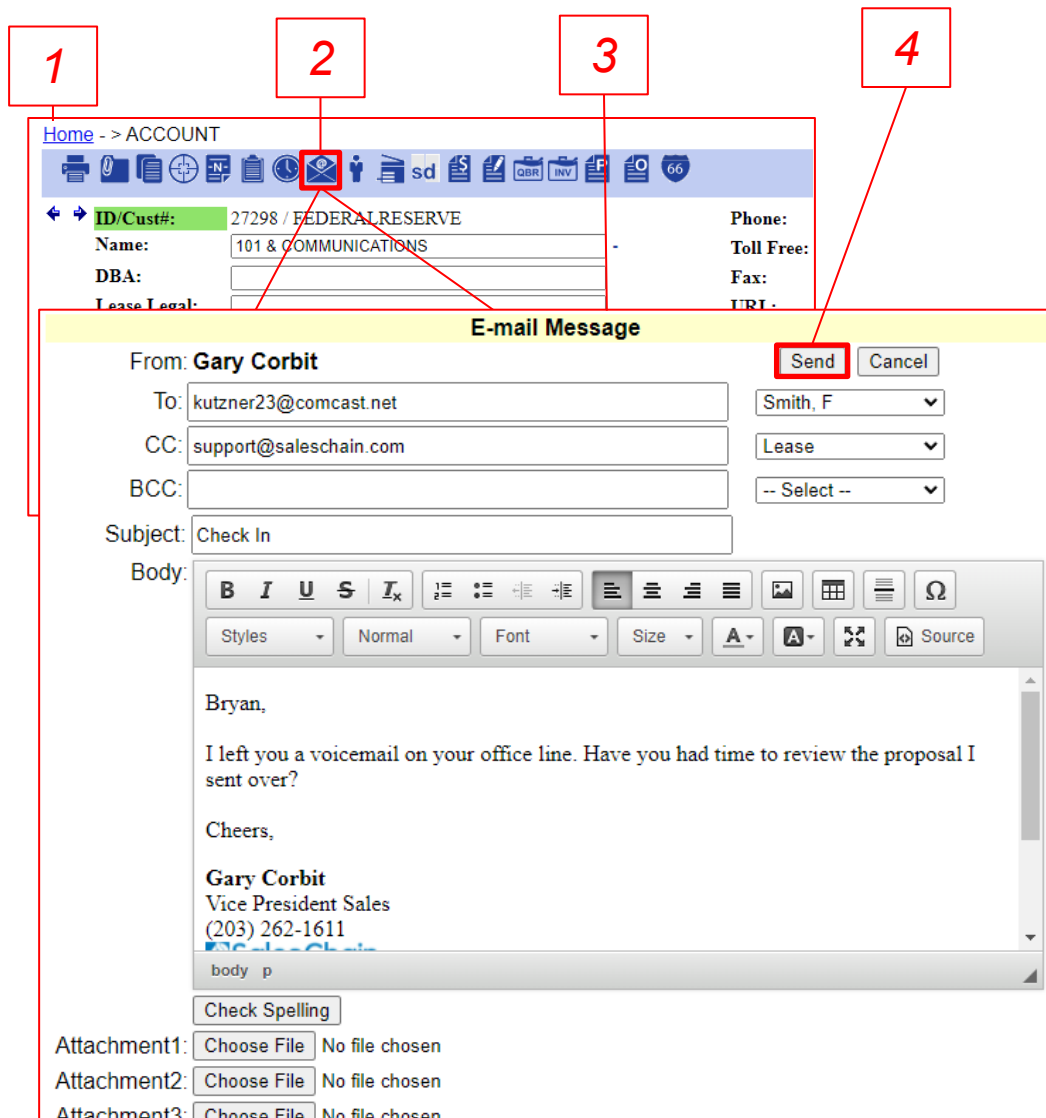
To send an email from SalesChain:

1. View the desired account
2. Click the *new email* icon 
3. Craft your email message *Note: Use the drop-downs on the right of each recipient box to quickly select recipients from this account or from your company. You may add as many recipients as you like.*
4. Click *Send*

**Quick Tip:**

Emails sent from the SalesChain system will be sent from our own internal email servers. Therefore, the first email in the chain (sent from you) will not appear in your email history. See [page 74](#) for how to track emails sent from SalesChain and [pages 69 - 72](#) if you intend to send emails from Outlook 365 instead (recommended).

## How To: Send an Email From the Account View



The screenshot shows the 'ACCOUNT' view in SalesChain. A red box labeled '1' highlights the 'ACCOUNT' breadcrumb. A red box labeled '2' highlights the 'new email' icon (envelope) in the top toolbar. A red box labeled '3' highlights the 'E-mail Message' form. A red box labeled '4' highlights the 'Send' button in the top right of the form.

**Account Information:**

- ID/Cust#: 27298 / FEDERAL RESERVE
- Name: 101 & COMMUNICATIONS
- DBA:
- Lease Legal:
- Phone:
- Toll Free:
- Fax:
- URI:

**E-mail Message Form:**

- From: Gary Corbit
- To: kutzner23@comcast.net (Dropdown: Smith, F)
- CC: support@saleschain.com (Dropdown: Lease)
- BCC: (Dropdown: -- Select --)
- Subject: Check In
- Body:
 


Bryan,

I left you a voicemail on your office line. Have you had time to review the proposal I sent over?

Cheers,

**Gary Corbit**  
Vice President Sales  
(203) 262-1611  
[SalesChain](#)
- Buttons: Send, Cancel
- Rich Text Editor: B, I, U, S, I<sub>x</sub>, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Table, Source
- Check Spelling
- Attachments: Attachment1: Choose File No file chosen; Attachment2: Choose File No file chosen; Attachment3: Choose File No file chosen

The email request log provides a history of all emails sent out of or staged to be sent out of the SalesChain system by the user as well as by the workflow system on behalf of the user.

To find the email desk, you can click on the email icon in your favorites bar  OR navigate to *Menu Sidebar > Accounts & Activity > Email*.

Key:	
1)	Email ID
2)	Email Information including subject, sender, recipient, and date and time sent
3)	Status of the email ( <i>sent</i> or <i>staged</i> )
4)	<i>Refresh</i> button allows you to see new emails or change search parameters
5)	The <i>Show</i> drop-down allows you to change how many emails are displayed
6)	The <i>-All Status-</i> drop-down allows you to sort by email status

## Quick Tip:


To track the process of e-Signed documents sent out of SalesChain, try the e-Sign Desk ([See Page 165](#))

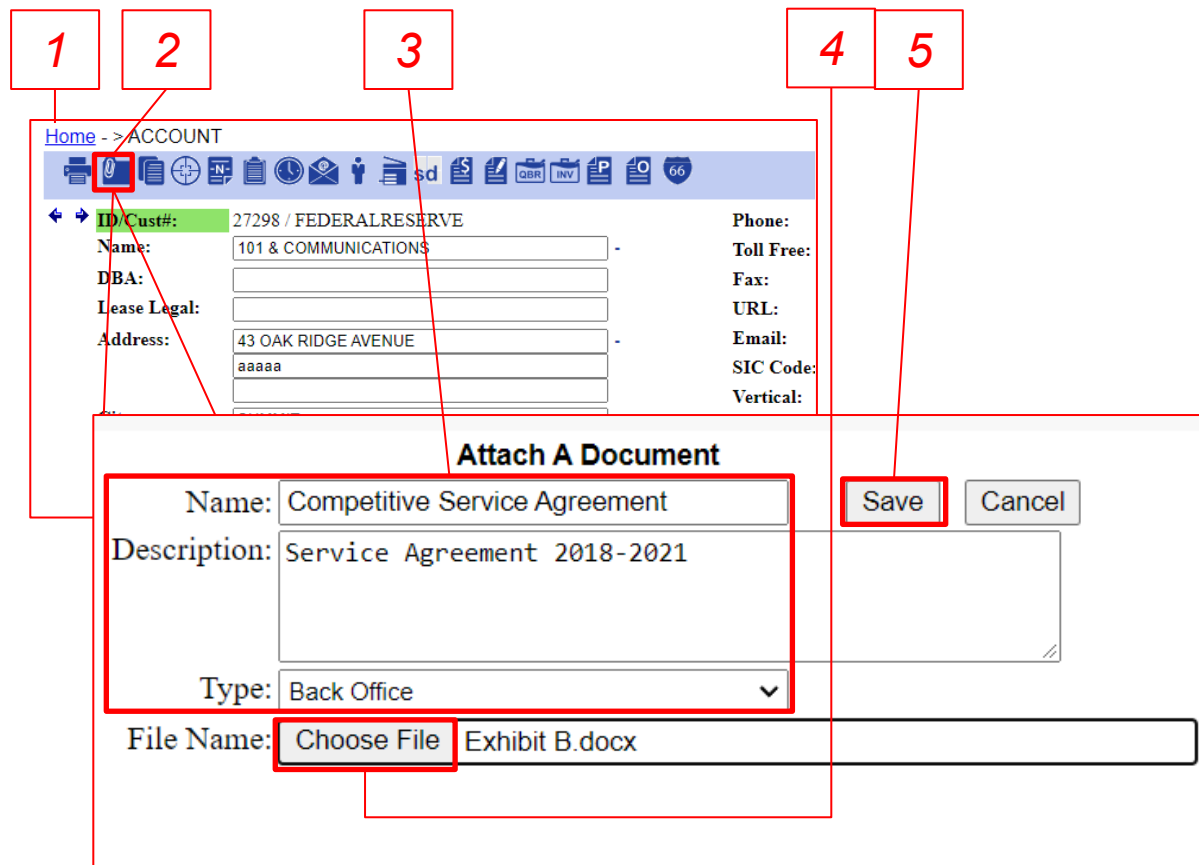
Email Request Log				
1 - 100 of 1832 - <a href="#">Next</a>			Show : 100	<a href="#">Refresh</a>
ID	SUMMARY	CREATED	- All Status -	
<a href="#">6099</a>	Document Signed Sender: support@saleschain.com Recipient: salesdemo@saleschain.com	12/16/2021 3:58 PM	Sent	
<a href="#">6100</a>	Signed Copy of Esign Document Package Sender: support@saleschain.com Recipient: 01234matthew@gmail.com	12/16/2021 3:58 PM	Sent	
<a href="#">6083</a>	Document Signed Sender: support@saleschain.com Recipient: salesdemo@saleschain.com	12/10/2021 2:10 PM	Sent	
<a href="#">6084</a>	Signed Copy of Esign Document Package Sender: support@saleschain.com Recipient: 01234matthew@gmail.com	12/10/2021 2:10 PM	Sent	
<a href="#">6080</a>	Document Signed Sender: support@saleschain.com Recipient: salesdemo@saleschain.com	12/07/2021 3:00 PM	Sent	
<a href="#">6081</a>	Signed Copy of Esign Document Package Sender: support@saleschain.com Recipient: 01234matthew@gmail.com	12/07/2021 3:00 PM	Sent	
<a href="#">6079</a>	Signed Copy of Esign Document Package Sender: support@saleschain.com Recipient: tim.szcztygiel@saleschain.com	12/03/2021 4:27 PM	Sent	
<a href="#">6078</a>	Document Signed Sender: support@saleschain.com Recipient: salesdemo@saleschain.com	12/03/2021 4:27 PM	Sent	
<a href="#">6076</a>	Document Signed Sender: support@saleschain.com Recipient: salesdemo@saleschain.com	12/03/2021 9:09 AM	Sent	
<a href="#">6077</a>	Signed Copy of Esign Document Package Sender: support@saleschain.com Recipient: tim.szcztygiel@saleschain.com	12/03/2021 9:09 AM	Sent	

## How To: Attach a File to An Account

It is possible to attach documents or other files to accounts in the account view.

To attach a file to an account:

1. View the desired account
2. Click the *attach a document* icon 
3. Enter a name for this document, enter a description if desired, and select a document type if desired
4. Click *Choose File* and browse your computer for the file that you would like to attach to this account
5. Click *Save*



Home - > ACCOUNT

ID/Cust#: 27298 / FEDERALRESERVE

Name: 101 & COMMUNICATIONS

DBA:

Lease Legal:

Address: 43 OAK RIDGE AVENUE

aaaaa

Phone:

Toll Free:

Fax:

URL:

Email:

SIC Code:

Vertical:

### Attach A Document

Name: Competitive Service Agreement


Description: Service Agreement 2018-2021


Type: Back Office

File Name: **Choose File** Exhibit B.docx

**Save** Cancel

### Quick Tips:


- Uploaded files can be viewed under an account's *activity* tab (see image to the right) Clicking on the  icon will download the file to your computer.
- It is possible to add most file types to accounts including images, documents, Excel files and more. Get creative and attach anything that might be relevant to an account or a sale!

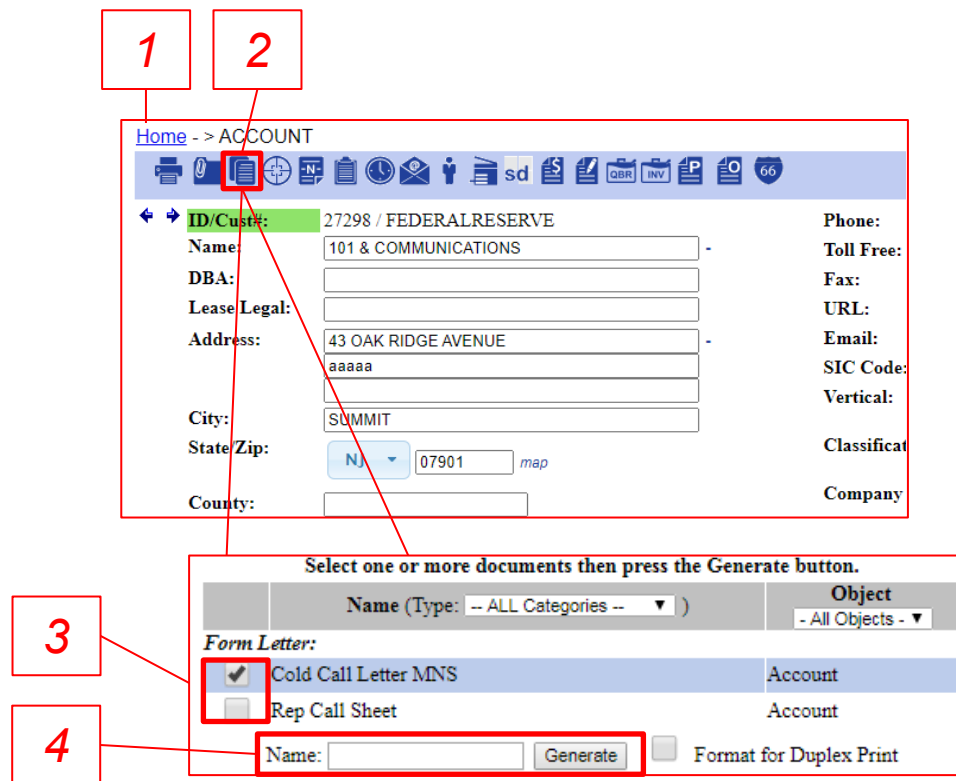
Activity Summary			
TYPE	OBJECT	ON-DATE	ACTIVITY
	Account	12/28/2021 5:24PM	<b>File:</b> Competitive Service Agreement <b>Description:</b> Service Agreement 2018-2021

## How To: Generate a Document From the Account View

It is possible to generate certain documents from the account view.

To generate certain documents:

1. View the desired account
2. Click the *Generate a Document* icon 
3. Select the documents you would like to generate using the check boxes
4. Enter a name for this document package and click *Generate*



Home - > ACCOUNT

ID/Cust#: 27298 / FEDERALRESERVE

Name: 101 & COMMUNICATIONS

DBA:

Lease Legal:

Address: 43 OAK RIDGE AVENUE

City: SUMMIT

State/Zip: NJ 07901

County:

Phone:

Toll Free:

Fax:

URL:

Email:

SIC Code:

Vertical:

Classification:

Company:

Select one or more documents then press the Generate button.

Name (Type: -- ALL Categories -- ) Object - All Objects -


Form Letter:

☒ Cold Call Letter MNS Account

☐ Rep Call Sheet Account

Name:   ☐ Format for Duplex Print

### Quick Tips:


- This is an archived method. We officially recommend that you generate most documents, including all order related and delivery documents, from the proposal and order system. (See Page 158)
- Document packages generated by this method will be accessible via the *Activity* tab in the account view. Clicking on the  icon will open the doc package in an online editor.

Activity Summary					
TYPE	OBJECT	ON-DATE	ACTIVITY	USER	
	Account	12/28/2021 5:24PM	File: Competitive Service Agreement Description: Service Agreement 2018-2021	Corbit, G	
	Order #3359	10/21/2021 1:35PM	Doc(s): Test	Corbit, G	

## How To: Add a Competitive Equipment Record

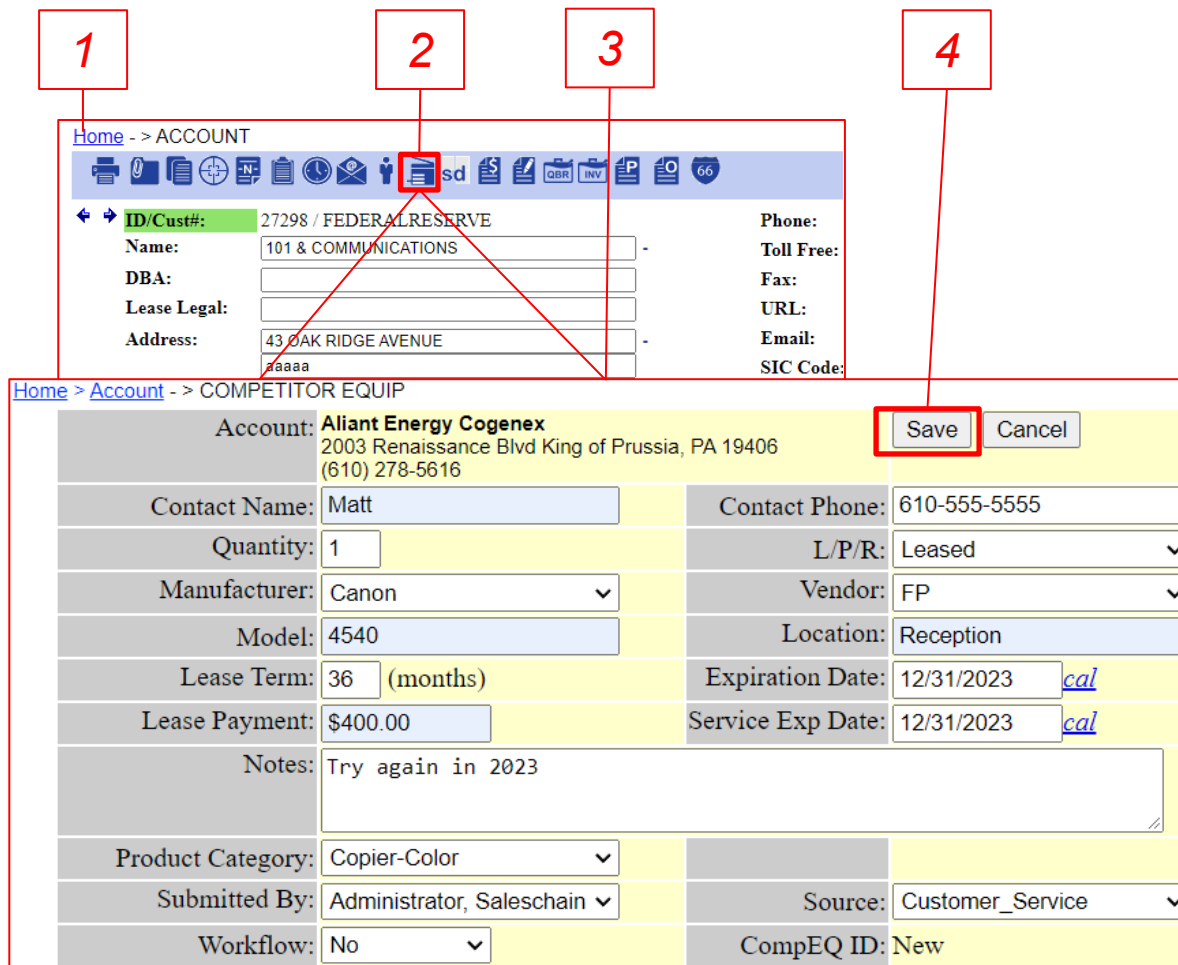
Competitive equipment records can be created from the account view to track competitive leases and help you target competitor's accounts.

To add a competitive equipment record to an account:

1. View the desired account
2. Click the *new competitive equipment record* icon 
3. Enter the details of this piece of competitive equipment including model name, competitive lease payment, competitive vendor, and **most importantly: Competitive Lease Expiration Date.**
4. Click Save

### Quick Tip:

By default, each competitive equipment record is associated with a workflow that provides the appropriate sales rep a notification at certain time intervals from the competitive lease expiration via email and a task created in SalesChain. That is why the competitive lease expiration date is so important – it determines the date that this workflow process will reference. **If no date is provided, the workflow notifications will not begin.**



The screenshot shows the 'ACCOUNT' view for 'FEDERAL RESERVE' (ID/Cust#: 27298). The 'COMPETITOR EQUIP' form is open, showing details for 'Aliant Energy Cogenex'. The 'Save' button is highlighted with a red box and number 4.

Account: Aliant Energy Cogenex 2003 Renaissance Blvd King of Prussia, PA 19406 (610) 278-5616		Save	Cancel
Contact Name:	Matt	Contact Phone:	610-555-5555
Quantity:	1	L/P/R:	Leased
Manufacturer:	Canon	Vendor:	FP
Model:	4540	Location:	Reception
Lease Term:	36 (months)	Expiration Date:	12/31/2023 <a href="#">cal</a>
Lease Payment:	\$400.00	Service Exp Date:	12/31/2023 <a href="#">cal</a>
Notes:	Try again in 2023		
Product Category:	Copier-Color		
Submitted By:	Administrator, Saleschain	Source:	Customer_Service
Workflow:	No	CompEQ ID:	New

4

# Deal Pricing

Pricing, Documenting, Delivering and  
Funding Processes Within  
SalesChain



Clicking on any contact will bring you to the corresponding contact view.

*\*See [page 80](#) for more information regarding the Action and Activity icons in the lead view.*

## Key:

- 1) Navigation tree
- 2) Action and Activity Icons
- 3) Link to the associated account
- 4) Lead status drop-down
- 5) General lead information
- 6) Expected close date
- 7) Quick note entry box

[Home](#) > [Account](#) -> LEAD

**Name:** 101 & COMMUNICATIONS (Account)  
**Address:** 43 OAK RIDGE AVENUE  
 aaaaa  
 SUMMIT, NJ 07901 [map](#)

**Sales Rep:** Gary Corbit

**Phone / Fax:** (203) 262-1611 /  
**Lead ID#** 4518

**Status:** New ▼ update

**Instructions:** Wants to print his own brochures  
**Date Created:** Corbit, G  
**Source:** Other

**Expected Delivery:**  
**Last Modified:**

**Submitted By:** Gary Corbit 12/29/2021  
**Classification:** Net-New Placement

**Original Submitter:** Gary Corbit 12/29/2021  
**InPlace Vendor:** The Local Copy Guys

Categorized Opportunity				
Category	Equipment	Revenue\$	GPS	Rep
Color Copier	c910	\$15,000.00	\$3,000.00	Corbit, G
<b>Total :</b>		\$15,000.00	\$3,000.00	

**\*\* Expected Close:** 01/07/2022















**% of Closure:** 80% = You have verified the DM is getting our dealership as a recommendation

**Next Step:**

**Quick Note:**  [zoom](#)

Save


## Action Icons in the Lead View

Icon	Associated Action
	Edit this lead
	Clone this lead
	Delete this lead (permission pending)
	Attach a document to this lead
	Generate a document for this lead
	Create a new lead
	Add a new note to this lead
	Add a task to this lead
	Schedule an appointment for this lead
	Send an email to contacts at this lead's account
	Create a new contact at this lead's account
	Add a competitive equipment record to this lead's account
	Create a proposal linked to this lead
	Create an order linked to this lead

## How To: Create a New Lead

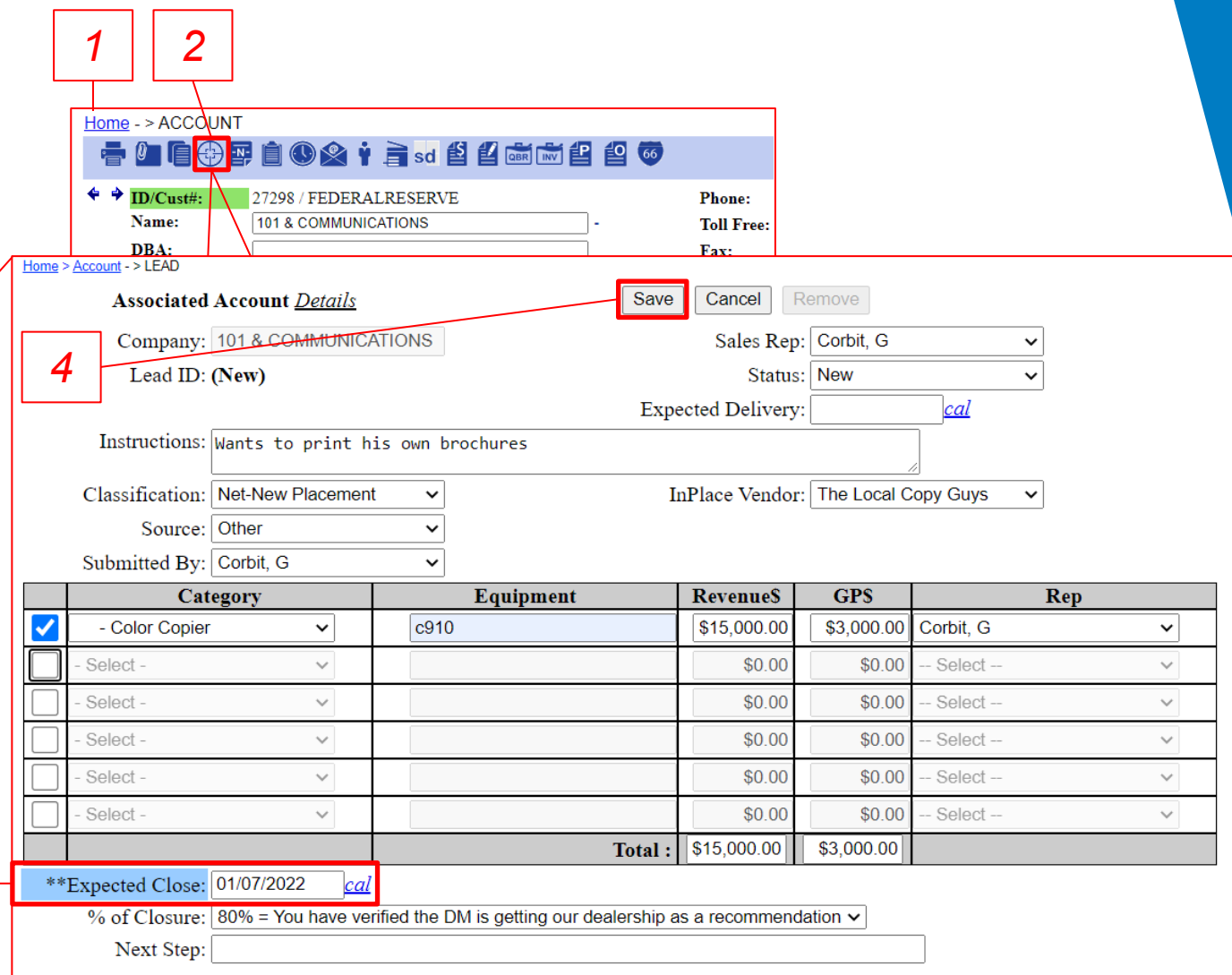
It is possible to manually create new leads from the account view.

To create a new lead:

1. View the desired account
2. Click the *new lead* icon 
3. Enter the details of the lead including the classification, instructions, model name, estimated revenue, and **most importantly: Expected Close Date**
4. Click Save

### Quick Tips:

- The expected close date is particularly important since, by default, each lead is placed on the forecast within the month of it's expected close date. **If no date is provided, the lead will not populate on the forecast.**
- Once a lead is created, you can view it under an account's *Sales* tab. One account can have many leads.



Home -> ACCOUNT

ID/Cust#: 27298 / FEDERALRESERVE  
Name: 101 & COMMUNICATIONS  
DBA:   
Phone:   
Toll Free:   
Fax:

Home > Account -> LEAD

**Associated Account Details**

Save Cancel Remove


Company: 101 & COMMUNICATIONS Sales Rep: Corbit, G  
Lead ID: (New) Status: New  
Expected Delivery:   
Instructions: Wants to print his own brochures  
Classification: Net-New Placement InPlace Vendor: The Local Copy Guys  
Source: Other  
Submitted By: Corbit, G

	Category	Equipment	Revenue\$	GPS	Rep
<input checked="" type="checkbox"/>	- Color Copier	c910	\$15,000.00	\$3,000.00	Corbit, G
<input type="checkbox"/>	- Select -		\$0.00	\$0.00	-- Select --
<input type="checkbox"/>	- Select -		\$0.00	\$0.00	-- Select --
<input type="checkbox"/>	- Select -		\$0.00	\$0.00	-- Select --
<input type="checkbox"/>	- Select -		\$0.00	\$0.00	-- Select --
<input type="checkbox"/>	- Select -		\$0.00	\$0.00	-- Select --
<b>Total :</b>			\$15,000.00	\$3,000.00	

**\*\*Expected Close:** 01/07/2022   
% of Closure: 80% = You have verified the DM is getting our dealership as a recommendation  
Next Step:

It is possible to make changes to a lead from the lead view.

To edit an existing lead:

1. Navigate to the desired lead
2. Click on the **Edit** icon 
3. Make the desired changes to the lead
4. Click **Save**

### Quick Tip:

To make changes to leads in bulk, you can use the forecasting tools.

1

2

Home > Account -> LEAD

Name: **101 & COMMUNICATIONS** (Account)

Address: **43 OAK RIDGE AVENUE**

3

Home > Account -> LEAD

**Associated Account Details**

Company: 101 & COMMUNICATIONS

Lead ID: (New)

Sales Rep: Corbit, G

Status: New

Expected Delivery:  cal

Instructions: Wants to print his own brochures

Classification: Net-New Placement

InPlace Vendor: The Local Copy Guys

Source: Other

Submitted By: Corbit, G

Save Cancel Remove

	Category	Equipment	Revenue\$	GPS	Rep
<input checked="" type="checkbox"/>	- Color Copier	c910	\$15,000.00	\$3,000.00	Corbit, G
<input type="checkbox"/>	- Select -		\$0.00	\$0.00	- Select -
<input type="checkbox"/>	- Select -		\$0.00	\$0.00	- Select -
<input type="checkbox"/>	- Select -		\$0.00	\$0.00	- Select -
<input type="checkbox"/>	- Select -		\$0.00	\$0.00	- Select -
<input type="checkbox"/>	- Select -		\$0.00	\$0.00	- Select -
	<b>Total :</b>		\$15,000.00	\$3,000.00	

\*\*Expected Close: 01/07/2022 cal

% of Closure: 80% = You have verified the DM is getting our dealership as a recommendation


Next Step:

4

## How To: Create a New Proposal From the Lead View

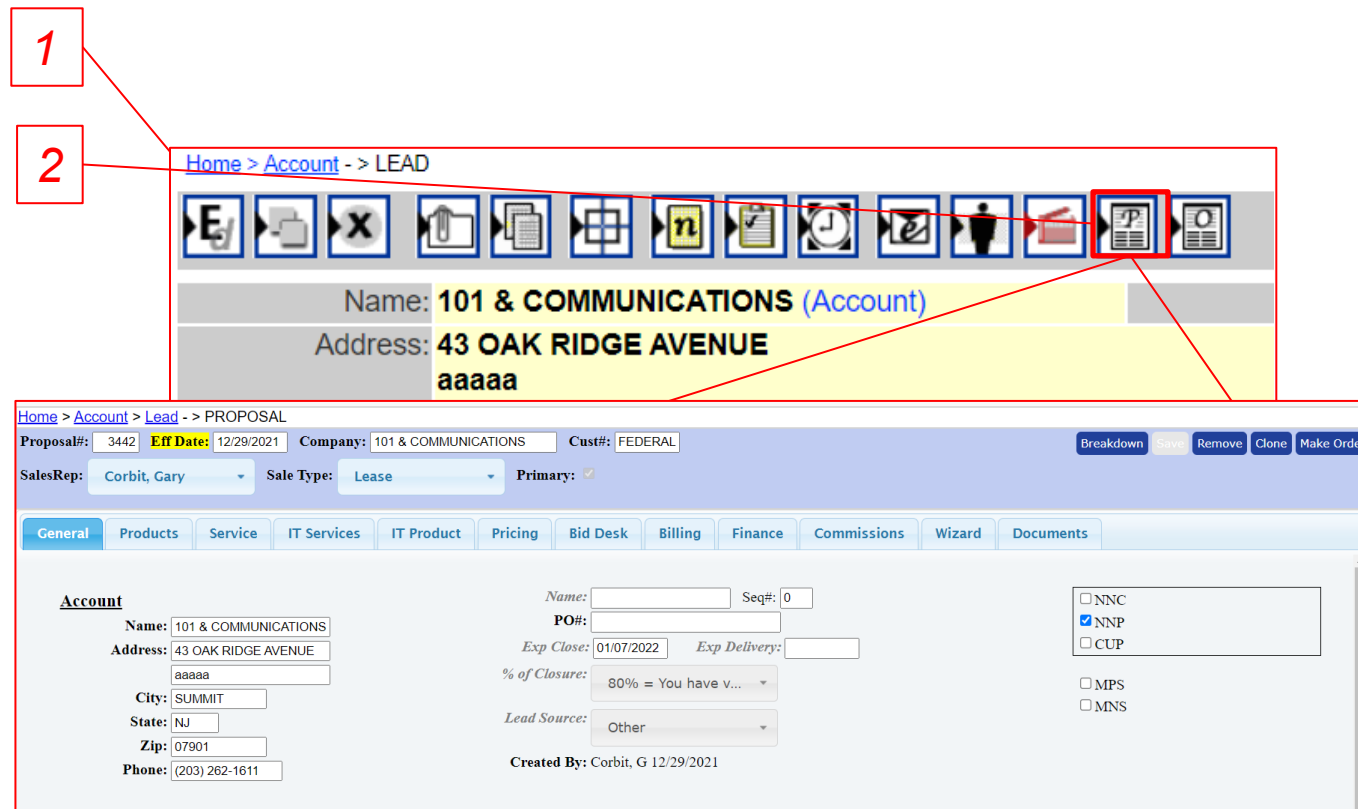
It is possible to save time and avoid potential duplicity by creating a proposal directly from a lead.

To create a proposal from a lead:

1. Navigate to the desired lead
2. Click on the *New Proposal* icon 
3. You will be taken to the order breakdown screen for this new proposal

### Quick Tips:

- Creating a proposal from the lead view will automatically associate that proposal with this lead record, ensuring that nothing is duplicated on your forecast.
- When you create a proposal from a lead, either through this method or the method outlined on [page 81](#), the information from this lead will populate in the *General* tab of the order breakdown.



**1**

**2**

Home > Account -> LEAD

Name: 101 & COMMUNICATIONS (Account)  
Address: 43 OAK RIDGE AVENUE  
aaaaa

Home > Account > Lead -> PROPOSAL

Proposal#: 3442 Edit Date: 12/29/2021 Company: 101 & COMMUNICATIONS Cust#: FEDERAL Breakdown Save Remove Clone Make Order

SalesRep: Corbit, Gary Sale Type: Lease Primary: ☒

General Products Service IT Services IT Product Pricing Bid Desk Billing Finance Commissions Wizard Documents

**Account**

Name: 101 & COMMUNICATIONS  
Address: 43 OAK RIDGE AVENUE  
aaaaa  
City: SUMMIT  
State: NJ  
Zip: 07901  
Phone: (203) 262-1611


Name: Seq#: 0  
PO#:   
Exp Close: 01/07/2022 Exp Delivery:   
% of Closure: 80% = You have v...  
Lead Source: Other  
Created By: Corbit, G 12/29/2021

☐ NNC  
☒ NNP  
☐ CUP  
☐ MPS  
☐ MNS

## How To: Create a New Proposal From the Account View

It is possible to create a proposal from the account view and either make a new lead or associate it with an existing lead.

To create a new proposal:

1. Navigate to the desired account
2. Click on the *new proposal* icon 
3. (Conditional) If existing active leads are associated with this account, you may associate this proposal with one of these leads by clicking the *Select* button next to that lead. To create a new lead, choose *Click here to create a new lead for your proposal*.
4. You will be taken to the order breakdown screen for this new proposal

### Quick Tips:

- Always give your proposals a name in the center column to be able to more easily identify them.
- It is possible to have many proposals associated with one lead. The *Primary* proposal will be the proposal whose value shows on your forecast. To clone a proposal, [see page 86](#), to make a proposal into an order, [see page 87](#).

1

2

Home -> ACCOUNT

ID/Cust#: 27298 / FEDERALRESERVE Phone: Toll Free: DBA: Fax: Lease Legal: URL:

Home > Account -> LEAD

The Account (101 & COMMUNICATIONS) has these existing leads, Please select one Lead below to associate the new proposal with.


LEAD#/ SALES REP	STATUS/ CATEGORY	ASSOCIATED WITH	PROPS/ GPS	SUBMIT ON/ EXP CLOSE	SOURCE/ CREATE DT	NEXT STEP
4518 Corbit, G	Working Sales Rep	Account 101 COMMUNICATIONS	-	12/29/2021 01/06/2022	Other 12/29/2021	Select
4231 Corbit, G	Working Sales Rep	Account 101 COMMUNICATIONS	-	06/08/2020 07/08/2020	Other 06/08/2020	Select
2423 Davis, M	Working Sales Rep	Account 101 COMMUNICATIONS	-	08/03/2015 -	Other 08/03/2015	Select
2395 Corbit, G	Working Sales Rep	Account 101 COMMUNICATIONS	-	05/29/2015 06/26/2015	Other 05/28/2015	Select
2238 Corbit, G	Working Sales Rep	Account 101 COMMUNICATIONS	-	09/06/2014 10/21/2014	Other 09/05/2014	Select

Click here to create a new lead for your proposal

4

Home > Account > Lead -> PROPOSAL

Proposal#: 3442 Edit Date: 12/29/2021 Company: 101 & COMMUNICATIONS Cust#: FEDERAL Breakdown Remove Clone Make Order

SalesRep: Corbit, Gary Sale Type: Lease Primary: 

General Products Service IT Services IT Product Pricing Bid Desk Billing Finance Commissions Wizard Documents

**Account**

Name: 101 & COMMUNICATIONS Seq#: 0

Address: 43 OAK RIDGE AVENUE


City: SUMMIT State: NJ Zip: 07901 Phone: (203) 262-1611

PO#: Exp Close: 01/07/2022 Exp Delivery: % of Closure: 80% = You have v... Lead Source: Other Created By: Corbit, G 12/29/2021

☐ NNC ☒ NNP ☐ CUP ☐ MPS ☐ MNS

It is possible to create an order from the account view and either make a new lead or associate it with an existing lead.

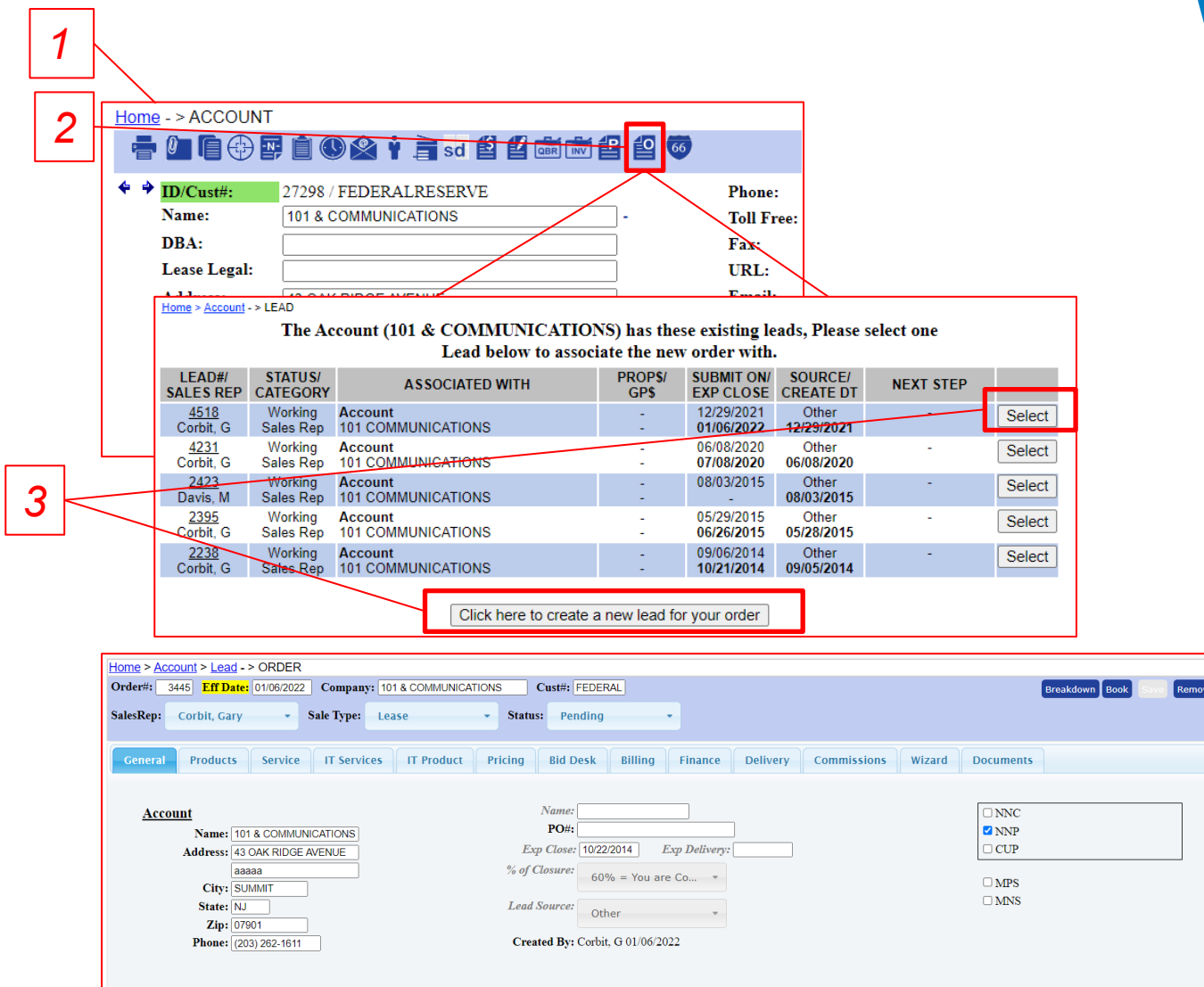
To create a new order:

1. Navigate to the desired account
2. Click on the *new order* icon 
3. (Conditional) If existing leads are associated with this account, you may associate this order with one of these leads by clicking the *Select* button next to that lead. To create a new lead, choose *Click here to create a new lead for your order* -- You will be taken to the order breakdown screen for this new order

#### Quick Tips:

- Always give your orders a name in the center column to be able to more easily identify them. This name will only be visible to system users.
- It is only possible to have one order associated with one lead. To offer a customer multiple options, use proposals instead. See pages 83-84

## How To: Create a New Order From the Account View



**1** Home -> ACCOUNT

**2** Click on the *new order* icon

**3** (Conditional) If existing leads are associated with this account, you may associate this order with one of these leads by clicking the *Select* button next to that lead. To create a new lead, choose *Click here to create a new lead for your order* -- You will be taken to the order breakdown screen for this new order

The Account (101 & COMMUNICATIONS) has these existing leads, Please select one Lead below to associate the new order with.

LEAD#/ SALES REP	STATUS/ CATEGORY	ASSOCIATED WITH	PROPS/ GPS	SUBMIT ON/ EXP CLOSE	SOURCE/ CREATE DT	NEXT STEP	
4518 Corbit, G	Working Sales Rep	Account 101 COMMUNICATIONS	-	12/29/2021 01/06/2022	Other 12/29/2021	-	Select
4231 Corbit, G	Working Sales Rep	Account 101 COMMUNICATIONS	-	06/08/2020 07/08/2020	Other 06/08/2020	-	Select
2423 Davis, M	Working Sales Rep	Account 101 COMMUNICATIONS	-	08/03/2015 -	Other 08/03/2015	-	Select
2395 Corbit, G	Working Sales Rep	Account 101 COMMUNICATIONS	-	05/29/2015 06/26/2015	Other 05/28/2015	-	Select
2238 Corbit, G	Working Sales Rep	Account 101 COMMUNICATIONS	-	09/06/2014 10/21/2014	Other 09/05/2014	-	Select

Click here to create a new lead for your order

Home > Account > Lead -> ORDER

Order#: 3445 Eff Date: 01/06/2022 Company: 101 & COMMUNICATIONS Cust#: FEDERAL Breakdown Book Save Remove

SalesRep: Corbit, Gary Sale Type: Lease Status: Pending

General Products Service IT Services IT Product Pricing Bid Desk Billing Finance Delivery Commissions Wizard Documents

**Account**

Name: 101 & COMMUNICATIONS  
Address: 43 OAK RIDGE AVENUE  
City: SUMMIT  
State: NJ  
Zip: 07901  
Phone: (203) 262-1611

Name:   
PO#:   
Exp Close: 10/22/2014 Exp Delivery:   
% of Closure: 60% = You are Co...  
Lead Source: Other

Created By: Corbit, G 01/06/2022

☐ NNC  
☒ NNP  
☐ CUP  
☐ MPS  
☐ MNS

## How To: Clone a Proposal

It is possible to clone proposals created in SalesChain to offer similar but slightly different options to potential clients.

To clone a proposal:

1. Navigate to the desired proposal
2. Click the *Clone* button - You will be taken to the order breakdown screen for this cloned proposal.
3. (Recommended) Give this cloned proposal a name for easy reference later
4. Click *Save*

The screenshot shows the SalesChain interface for cloning a proposal. Red boxes and numbers 1-4 highlight the steps:

- 1**: A red box highlights the top navigation bar containing the 'Clone' button.
- 2**: A red box highlights the 'Clone' button in the top navigation bar.
- 3**: A red box highlights the 'Name' field in the 'Account' section, which is currently set to 'Option Two'.
- 4**: A red box highlights the 'Save' button in the top right corner of the main form area.

The interface shows the following details:

- Company:** 101 & COMMUNICATIONS
- Cust#:** FEDERAL
- Type:** Lease
- Primary:** ☒
- Buttons:** Breakdown, Save, Remove, Clone, Make Order
- Proposal#:** 3449
- Eff Date:** 01/06/2022
- Company:** 5503 Lakeside Llc
- Cust#:**
- SalesRep:** Corbit, Gary
- Sale Type:** Lease
- Primary:** ☐
- Associated With Order#** 3450
- Account Name:** 5503 Lakeside Llc
- Address:** 5503 Lakeside Ave
- City:** Henrico
- State:** VA
- Zip:** 23228
- Phone:** (490) 854-5898
- Name:** Option Two
- Seq#:** 0
- PO#:**
- Exp Close:** 02/05/2022
- Exp Delivery:**
- % of Closure:** 60% = You are Co...
- Lead Source:** Other
- Created By:** Corbit, G 01/06/2022
- Options:** NNC, NNP, CUP, MPS, MNS

### Quick Tips:

- The cloned proposal will not be designated as the primary unless you check the Primary box
- Be sure to name your second proposal for easy reference later. This name will only be visible to system users.

## How To: Make a Proposal Into an Order

It is possible to convert proposals created in SalesChain into orders as deals progress

To change a proposal into an order:

1. Navigate to the desired proposal
2. If unchecked, check the box next to *Primary* to make this the primary proposal (See Page 88)
3. Click on the *Make Order* icon -- You will be taken to the order breakdown screen for this new order.

The screenshot shows the SalesChain interface with three numbered steps highlighted by red boxes:

- 1**: Points to the top navigation bar.
- 2**: Points to the **Primary:** checkbox, which is currently unchecked.
- 3**: Points to the **Make Order** button in the top right corner.

Below the navigation bar, the **ORDER** screen is visible. It includes fields for **Order#** (3445), **Eff Date** (01/06/2022), **Company** (101 & COMMUNICATIONS), and **Cust#** (FEDERAL). The **Sale Type** is set to **Lease** and the **Status** is **Pending**. The **Account** section shows details for **101 & COMMUNICATIONS**, including address, city, state, zip, and phone. The **% of Closure** is set to 60% and the **Lead Source** is **Other**. The **Created By** is Corbit, G on 01/06/2022. The **Documents** tab is selected, showing a list of documents with checkboxes for **NNC**, **NNP**, **CUP**, **MPS**, and **MNS**.

### Quick Tips:

- When you turn a proposal into an order, all the proposal details including pricing, billing, and financing information, as well as documents that have been generated, will be carried over.
- Only the primary proposal can be changed into an order

It is possible to have multiple proposals associated with a single lead. If you have more than one proposal, only one will be designated as the primary. It is possible to change which proposal is designated as the primary.

To change set a proposal as the primary:

1. Navigate to the desired proposal
2. If unchecked, check the box next to *Primary*
3. Click the red flashing Save button

**Quick Tip:**

If no orders are created associated with this lead, but there are multiple proposals only the primary proposal will be displayed on the forecast.

## How To: Set a Proposal as the Primary Proposal

1

The screenshot shows the 'PROPOSAL' form for Proposal # 3477. The 'Primary' checkbox is currently unchecked. A red box highlights the 'Primary' label and its checkbox. A red arrow points from the number '1' to this checkbox. Another red box highlights the 'Save' button in the bottom right corner, with a red arrow pointing from the number '3' to it. A third red box highlights the 'Primary' label and checkbox again, with a red arrow pointing from the number '2' to it.

Home > Account > Lead -> PROPOSAL  
 Proposal#: 3477 **EDIT** Date: 01/29/2022 Company: Southern Management Corp. Cust#: Southern  
 SalesRep: Corbit, Gary Sale Type: Lease Primary: ☐ Breakdown Remove Clone Make Order

General Products Service IT Services IT Product Pricing Bid Desk Billing Finance Commissions Wizard Documents

Equipment Adjustments

Pricing Details (NNP)  
 Price Level: House  
 Credit Level: - Optional -  
 Contract#:   
 Date Appr: 01/26/2022 Bid Desk Request

Financing Summary  
 SLevel: Standard  
 Company: DLL  
 Product: \$1 OUT  
 Term: 36  
 Level: 1,000 - 3,000.99  
 Factor: 0.037128  
☐ Override Factor  
 Financed\$: \$0.00  
 %MSRP: 0.00%  
 Eq Pymt\$: \$0.00  
 Soft Cost\$: \$0.00  
 Soft Cost%: 0.00%

Cost/Profit Summary  
 Total Buy\$: \$0.00  
 MFG Credit\$: \$0.00  
 Adj Buy\$: \$0.00  
 Total Sell\$: \$0.00  
 Base GPS: \$0.00  
 Adjusted GPS: \$0.00  
 Total MSRP\$: \$0.00  
 Split\$: \$0.00  
 Split\$: \$0.00  
 Bonus\$: \$0.00

Scenario Pricing  
☐ Lock Accessory Pricing  
☐ No Charge Accessories  
☐ Supplies at Cost\$  
 Scenario: SCENARIO  
 Target:   
 Calculate Scenario

Postage Summary  
 Meters/Mo: \$NaN  
 RSS/Yr: \$NaN

SUBTOTAL: \$0.00  
 Service Give Away(b): \$0.00  
 Supplies if no Base(b): \$0.00  
☒ Misc Deduction (b): \$0.00  
☒ Misc Credit (b): \$0.00  
 Service In Lease(t)(b): \$0.00  
 Service Not In Lease(t)(b): \$0.00  
 ITPS In Lease(t)(b): \$0.00  
 ITPS Not In Lease(t)(b): \$0.00  
 BOARD CREDIT: \$0.00  
 Delivery(f): \$0.00  
 Connectivity Fee(f): \$0.00  
☒ Lease Nbr / Buyout (f): \$0.00  
 Upfront Supplies(f): \$0.00  
☒ Misc Fees (f): \$0.00  
☒ Misc Test Adj (t)(f): \$0.00  
 GRAND TOTAL: \$0.00

Note:

2 Primary: ☒

3 Breakdown Book **Save** Remove

Not every deal will be leased. You can change the sale type of any given proposal or order.

*Important: some available fields in the proposal and order process – particularly those related to financing – will become unavailable if the sale type is changed away from Lease.*

To change a proposal or order's sale type:

1. Navigate to the desired proposal or order
2. Select the desired status using the *Sale Type* drop-down in the header.

## How To: Change a Proposal or Order's Sale Type

1

Home > Account > Lead -> ORDER  
 Order#: 3445 Eff Date: 01/06/2022 Company: 101 & COMMUNICATIONS Cust#: FEDERAL  
 SalesRep: Corbit, Gary Sale Type: Lease Status: Pending  
 Breakdown Book Save Remove

General Products Service IT Services IT Product Pricing Bid Desk Billing Finance Delivery Commissions Wizard Documents

**Account**  
 Name: 101 & COMMUNICATIONS  
 Address: 43 OAK RIDGE AVENUE  
 City: SUMMIT  
 State: NJ  
 Zip: 07901  
 Phone: (203) 262-1611

Name: PO#: Exp Close: 10/22/2014 Exp Delivery: % of Closure: 60% = You are Co...  
 Lead Source: Other Created By: Corbit, G 01/06/2022

☐ NNC  
☒ NNP  
☐ CUP  
☐ MPS  
☐ MNS

2

**Sale Type:** Lease

SALE TYPE

Cash Sale

Demo

Lease

Move

Rental

### Quick Tip:

Sale Type options are customized upon system configuration and may vary greatly.

## How To: Change an Order's Status

As orders move through the pricing and fulfillment process, you will need to change the order status to trigger workflow steps and send notifications to users within the system.

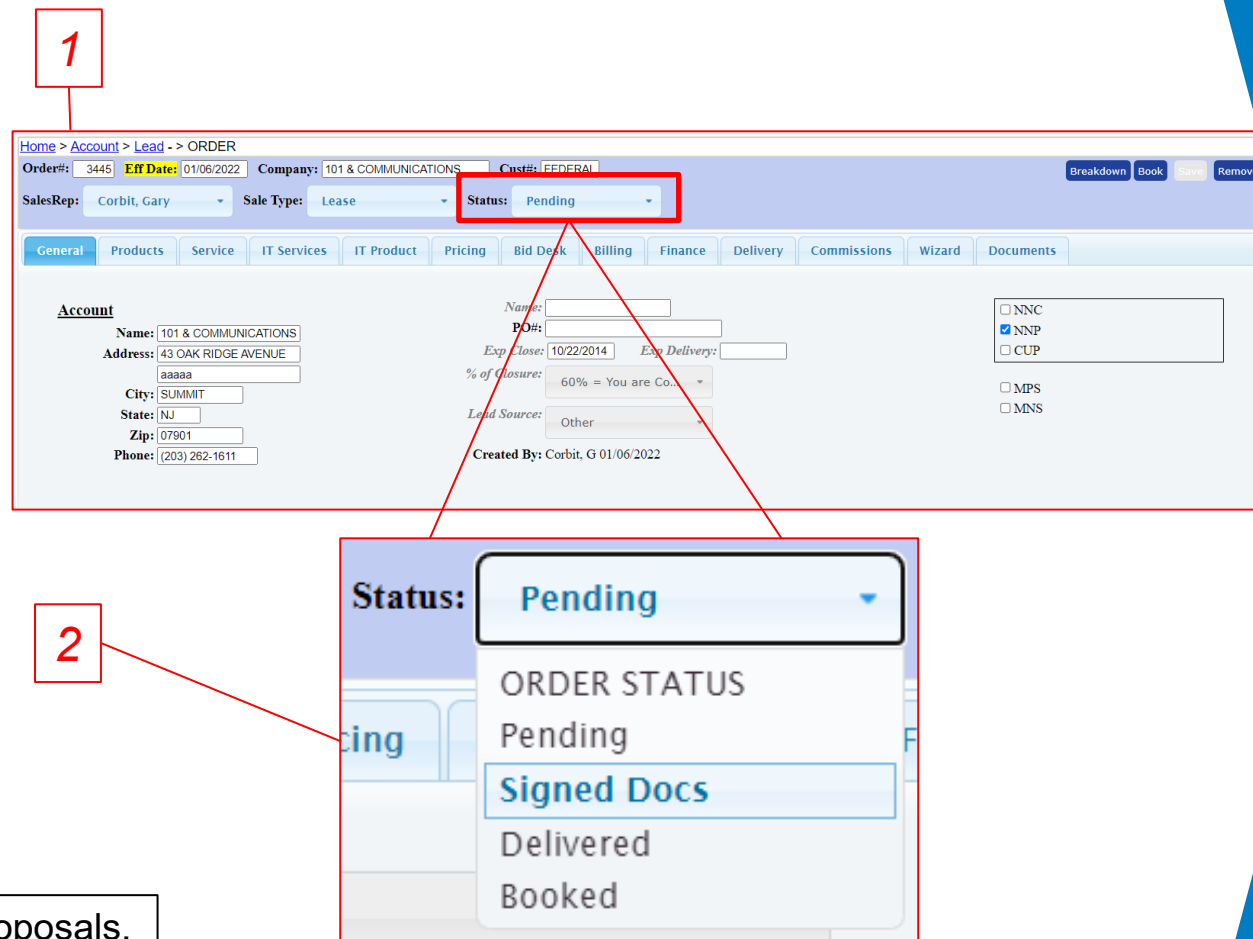
*Important: deals set to some statuses may be locked for editing to certain user types. For example: sales reps may not edit signed docs or delivered proposals and orders.*

To change a proposal or order's status:

1. Navigate to the desired proposal or order
2. Select the desired status using the *Status* drop-down in the header.

### Quick Tips:

- The Status drop-down will only be displayed on orders, not proposals.
- Order status options are customized upon system configuration and may vary greatly. Consult your system administrator if you're not sure which status to use at what point in the order process.



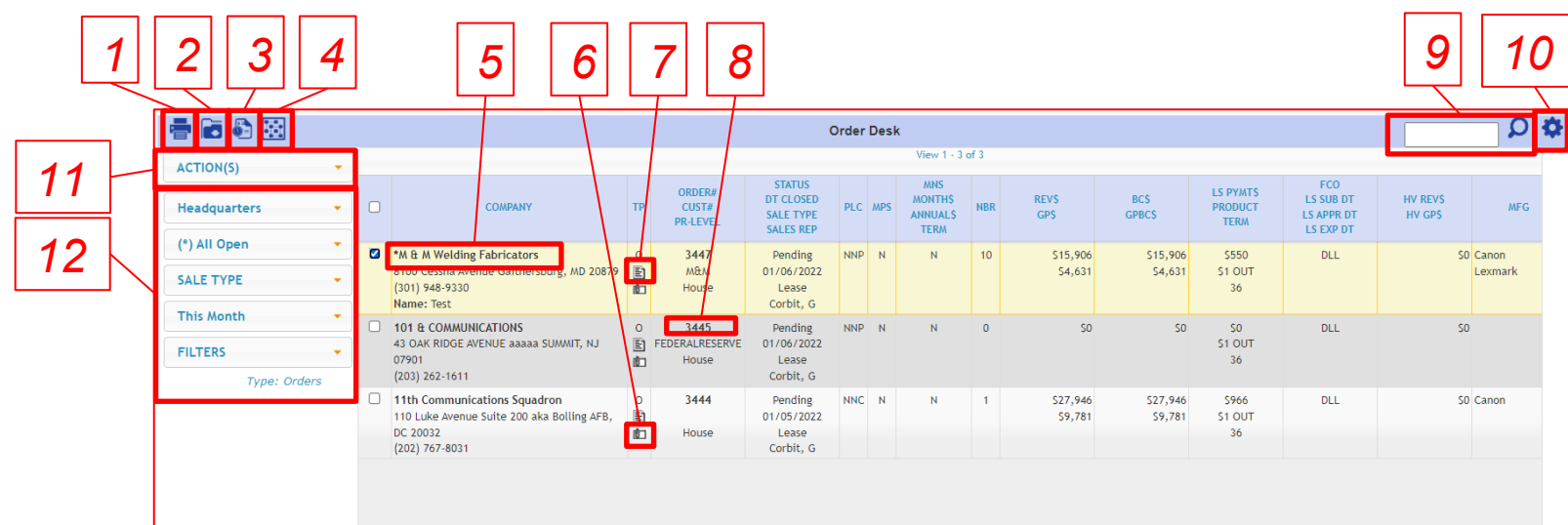
Existing proposals and orders in the SalesChain system can be viewed, searched, and edited in bulk in the order desk.

To view the order desk, click on the order icon in your favorites bar 

Or navigate to *Menu Sidebar > Sales > Order Desk*

## Key:

- 1) Print the contents of this report (permission pending)
- 2) Download the contents of this report (permission pending)
- 3) Schedule this report to be emailed to you or others on a regular basis (permission pending)
- 4) Show/hide branch, team, and sales rep grouping
- 5) Jump to the associated account
- 6) Attach a document to this proposal/order
- 7) Generate a document from this proposal/order
- 8) View this order
- 9) Keyword Search Box
- 10) Save your preferences for this screen



The screenshot shows the 'Order Desk' interface. At the top, there is a header bar with a search box (9) and a settings gear icon (10). Below the header, there is a table of orders. The table has columns for COMPANY, ORDER#, CUST#, PR-LEVEL, STATUS, DT CLOSED, SALE TYPE, PLC, MPS, MNS, MONTHS, ANNUALS, TERM, NBR, REVS, GP\$, BC\$, GPBC\$, LS PYMT\$, PRODUCT, TERM, FCO, LS SUB, DT, LS APPR, DT, LS EXP, DT, HV, REVS, HV, GP\$, and MFG. The first row is highlighted in yellow and contains the following data: COMPANY: \*M & M Welding Fabricators, ORDER#: 3447, CUST#: M&M, PR-LEVEL: House, STATUS: Pending, DT CLOSED: 01/06/2022, SALE TYPE: Lease, PLC: Corbit, G, MPS: NNP, MNS: N, MONTHS: 10, ANNUALS: 10, REVS: \$15,906, GP\$: \$4,631, BC\$: \$15,906, GPBC\$: \$4,631, LS PYMT\$: \$550, PRODUCT: S1 OUT, TERM: 36, FCO: DLL, LS SUB: 50, DT: 36, HV: 50, REVS: 36, MFG: Canon Lexmark. The second row is highlighted in grey and contains the following data: COMPANY: 101 & COMMUNICATIONS, ORDER#: 3445, CUST#: FEDERALRESERVE, PR-LEVEL: House, STATUS: Pending, DT CLOSED: 01/06/2022, SALE TYPE: Lease, PLC: Corbit, G, MPS: NNP, MNS: N, MONTHS: 0, ANNUALS: 0, REVS: \$0, GP\$: \$0, BC\$: \$0, GPBC\$: \$0, LS PYMT\$: \$0, PRODUCT: S1 OUT, TERM: 36, FCO: DLL, LS SUB: 50, DT: 36, HV: 50, REVS: 36, MFG: Canon. The third row is highlighted in grey and contains the following data: COMPANY: 11th Communications Squadron, ORDER#: 3444, CUST#: 110 Luke Avenue Suite 200 aka Bolling AFB, PR-LEVEL: DC 20032, STATUS: Pending, DT CLOSED: 01/05/2022, SALE TYPE: Lease, PLC: Corbit, G, MPS: NNC, MNS: N, MONTHS: 1, ANNUALS: 1, REVS: \$27,946, GP\$: \$9,781, BC\$: \$27,946, GPBC\$: \$9,781, LS PYMT\$: \$966, PRODUCT: S1 OUT, TERM: 36, FCO: DLL, LS SUB: 50, DT: 36, HV: 50, REVS: 36, MFG: Canon. On the left side of the table, there is a sidebar with a list of actions (11) and filters (12). The actions list includes: ACTION(S), Headquarters, (\* All Open), SALE TYPE, This Month, and FILTERS. The filters list includes: Type: Orders. The table is titled 'Order Desk' and shows 'View 1 - 3 of 3'.

Existing leads, proposals, and orders in the SalesChain system can be viewed in the account view's *Sales* tab.

## Key:

- 1) Existing Leads at this account
- 2) Existing Proposals at this account
- 3) Existing Orders at this account

1

2

3

Contacts					Activity	TCO Analysis	Sales	Marketing	CompEQ	Groups	Workflow	SRA	ALL
Leads													
LEAD#/ SALES REP		STATUS/ CATEGORY		ASSOCIATED WITH				PROPS/ GP\$		SUBMIT ON/ EXP CLOSE			
4521 Corbit		Working Sales Rep		Account 5503 Lakeside Llc				\$55,923.08 \$19,573.08		01/06/2022 02/05/2022			
Proposals													
PROPOSAL#		DATE SALES REP		LABEL ADDRESS				TOTAL \$ GP\$					
*3448		01/06/2022 Gary Corbit		Option One 5503 Lakeside Ave Henrico, VA 23228				\$55,923.08 \$19,573.08					
3449		01/06/2022 Gary Corbit		Option Two 5503 Lakeside Ave Henrico, VA 23228				\$39,230.77 \$13,730.77					
* Indicates primary proposal													
Orders													
ORDER# STATUS		DATE SALES REP		LABEL ADDRESS				TOTAL \$ GP\$					
3450 Pending		01/06/2022 Gary Corbit		Option One 5503 Lakeside Ave Henrico, VA 23228				\$55,923.08 \$19,573.08					

## Quick Tips:

- Primary proposals will be bolded and marked with a \*
- Click on any lead/proposal/order number to jump to that record

Home > Account -> LEAD

Name: 5503 Lakeside Llc (Account) Sales Rep: Gary Corbit

Address: 5503 Lakeside Ave  
Henrico, VA 23228 map

Phone / Fax: (480) 854-8898 / () -702 Status: Working update

Lead ID# 4521 Expected Delivery:

Instructions:

Date Created: 01/06/2022 Corbit, G Last Modified: 01/06/2022 Corbit, G

Source: Other

Submitted By: Gary Corbit 01/06/2022 Original Submitter: Gary Corbit 01/06/2022

Classification: Net-New Customer InPlace Vendor:

Category	Equipment	Revenue\$	GP\$	Rep
Copier-Color	imagePRESS C910 Series Main Engine Set	\$55,923.08	\$19,573.08	Corbit, G
<b>Total</b>		<b>\$55,923.08</b>	<b>\$19,573.08</b>	

\* Expected Close: 02/05/2022

\* Proposal # / \$ : 3448 / \$55,923.08 Option One

Proposal # / \$ : 3449 / \$39,230.77 Option Two

Order # / \$ : 3450 / \$55,923.08 Option One

% of Closure: 60% = You are Comfortable with the deal and its progression

Next Step:

Quick Note:

zoom Save

## Tabs in the Order Breakdown

Tab	Page Number	Description
General	<u>94</u>	Enter basic account and lead information
Products	<u>95</u>	Add, edit or remove product bundles
Service	<u>101</u>	Configure various service contract options
IT Services	<u>108</u>	Add, edit or remove IT services offerings
IT Product	<u>111</u>	Add, edit or remove any IT product bundles
Pricing	<u>112</u>	Adjust the financial aspects of the deal, configure pricing levels, and process scenario pricing.
Bid Desk*	<u>117</u>	View and process sales rep bid desk requests (*Permission pending)
Billing	<u>129</u>	Provides the account's ShipTo address
Finance	<u>132</u>	Displays configurable lease information
Delivery**	<u>137</u>	Lists delivery and tracking information (**Only Displayed on Orders)
Commissions	<u>148</u>	Displays commission related information
Documents	<u>152</u>	Lists various generatable documents

## Proposal and Order Pricing: The General Tab

The general tab of the order breakdown allows users to view, edit and verify basic account and lead information, name their proposals and orders for easy reference (Highly Recommended), designate this deal as a target within SalesChain's profile targeting and segmentation tools and more. Basic account and lead information will be automatically populated within this order if that information exists within that account and the associated lead record.

### Key:

- 1) Basic account information
- 2) Proposal/Order name entry box
- 3) PO# entry box
- 4) Basic lead information
- 5) Sale classification (Net New Customer (NNC), Net New Placement (NNP), or Customer Upgrade (CUP))
- 6) Target this account for specialty sales in SalesChain's profile targeting and segmentation suite

The screenshot shows the 'General' tab of the SalesChain interface. It features a top navigation bar with tabs: General, Products, Service, IT Services, IT Product, Pricing, Bid Desk, Billing, Finance, Delivery, Commissions, Wizard, and Documents. The main content area is divided into several sections:

- Account Section (Callout 1):** Contains fields for Name (5503 Lakeside Llc), Address (5503 Lakeside Ave), City (Henrico), State (VA), Zip (23228), and Phone ((480) 854-5898).
- Proposal/Order Name Entry (Callout 2):** A text box labeled 'Name:' containing 'Option One'.
- PO# Entry (Callout 3):** A text box labeled 'PO#:'.
- Basic Lead Information (Callout 4):** Includes 'Exp Close:' (02/05/2022), 'Exp Delivery:', '% of Closure:' (60% = You are Co...), 'Lead Source:' (Other), and 'Created By:' (Corbit, G 01/06/2022).
- Sale Classification (Callout 5):** A group of checkboxes for NNC (checked), NNP, CUP, MPS, and MNS.
- Targeting and Segmentation (Callout 6):** A section for targeting and segmentation, currently empty.

### Quick Tips:



- Information that is changed in this screen may need to be saved. If the save button flashes red (as in the image to the right) you have changes that are unsaved.
- The red save button serves to indicate that information being saved will make changes not only to this proposal/order but also to other records in the system like accounts or leads.



## Proposal and Order Pricing: The Products Tab

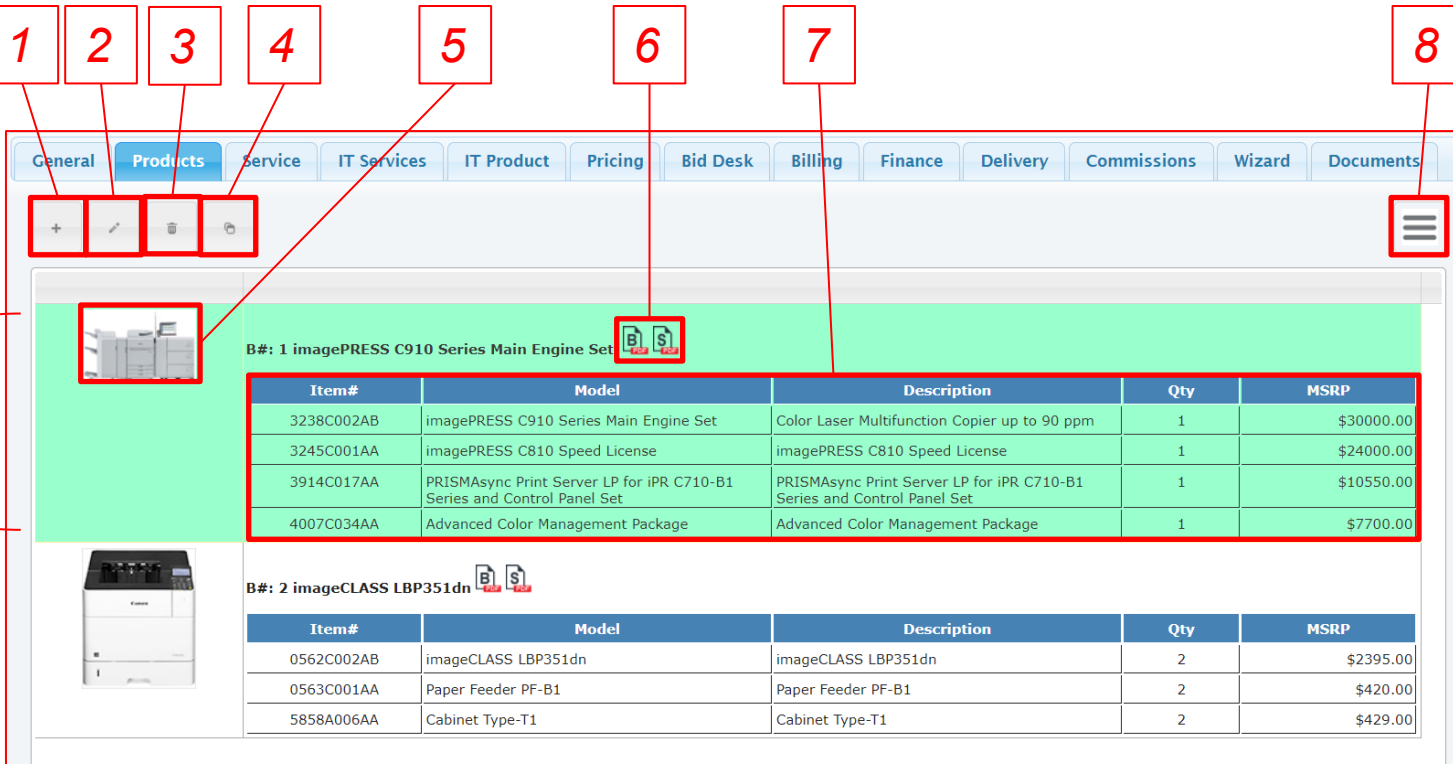
The products tab of the order breakdown allows users to view, add and edit equipment to this proposal or order from SalesChain's hardware catalog.

### Key:

- 1) Add a new bundle
- 2) Edit this bundle
- 3) Delete this bundle
- 4) Clone this bundle
- 5) Mainframe Image
- 6) Open the brochure  and spec sheet  for this mainframe
- 7) Bundle contents
- 8) View these products in the *line item view*. For a table-style breakdown of the equipment. (See [Page 96](#))
- 9) Click on a bundle to select it. Selected bundles will turn green (as shown).

### Quick Tip:

Each *bundle* represents a mainframe and its accessories. It is possible to have a quantity of more than one of this bundle, representing multiple machines with identical configurations.



The screenshot shows the 'Products' tab in the SalesChain interface. The top navigation bar includes tabs for General, Products, Service, IT Services, IT Product, Pricing, Bid Desk, Billing, Finance, Delivery, Commissions, Wizard, and Documents. Below the navigation bar is a toolbar with icons for adding, editing, deleting, and cloning bundles, as well as a mainframe image icon and a menu icon. The main content area displays two bundles, each with a table of items.

**B#: 1 imagePRESS C910 Series Main Engine Set**

Item#	Model	Description	Qty	MSRP
3238C002AB	imagePRESS C910 Series Main Engine Set	Color Laser Multifunction Copier up to 90 ppm	1	\$30000.00
3245C001AA	imagePRESS C810 Speed License	imagePRESS C810 Speed License	1	\$24000.00
3914C017AA	PRISMAsync Print Server LP for iPR C710-B1 Series and Control Panel Set	PRISMAsync Print Server LP for iPR C710-B1 Series and Control Panel Set	1	\$10550.00
4007C034AA	Advanced Color Management Package	Advanced Color Management Package	1	\$7700.00

**B#: 2 imageCLASS LBP351dn**

Item#	Model	Description	Qty	MSRP
0562C002AB	imageCLASS LBP351dn	imageCLASS LBP351dn	2	\$2395.00
0563C001AA	Paper Feeder PF-B1	Paper Feeder PF-B1	2	\$420.00
5858A006AA	Cabinet Type-T1	Cabinet Type-T1	2	\$429.00

## How To: Add a New Bundle From The Catalog

In the product tab of a proposal or order, you may add one or many bundles, each representing one mainframe and its accessories.

To add a bundle to a proposal or order:

1. Navigate to the *products* tab
2. Click the *new bundle* button
3. Search for and add a mainframe by **a)** using the drop-downs for category, manufacturer (MFG) and model or **b)** searching for the model name in the search box
4. Set the bundle quantity (how many machines of exactly this configuration you are selling. This defaults to 1)
5. Add a bundle name (Recommended)
6. Select the accessories to include in this bundle using the check boxes
7. Click *Save* to add this bundle to your proposal/order

### Quick Tips:

- The *Opt* column of checkboxes allows you to select optional accessories which can be priced at their incremental upgrade value using the wizard tab. See page 153 - 154 for how to include optional upgrades on your proposal.
- Use the < button at the top left to hide the sidebar and view more of the accessories table.

The screenshot shows the 'Products' tab in the SalesChain interface. A red box labeled '1' highlights the 'Products' tab. A red box labeled '2' highlights the '+ New Bundle' button. A red box labeled '3a' highlights the 'Category' dropdown menu. A red box labeled '3b' highlights the 'MFG' dropdown menu. A red box labeled '4' highlights the 'Model' dropdown menu. A red box labeled '5' highlights the 'Quantity' input field. A red box labeled '6' highlights the 'Search' input field. A red box labeled '7' highlights the 'Save' button at the bottom right of the 'Add Bundle' dialog.

The 'Add Bundle' dialog shows the following fields:

- Category: Printer-BW
- MFG: Canon
- Model: imageCLASS LBP351dn
- Package(s): Select
- Quantity: 2
- Search: lpb3
- Exclude From Service: ☐
- MANUAL ENTRY: ☐
- Bundle Name: Add On B&W Printers

The 'Add Bundle' dialog also displays a table of accessories with checkboxes for selection:

Category	Item#	Model	Opt	Description	MSRP
Printer-BW	_0562C002AB	imageCLASS LBP351dn	<input checked="" type="checkbox"/>	imageCLASS LBP351dn	\$2,395.00
Hardware Accessories	_0563C003AA	Envelope Feeder-A1	<input type="checkbox"/>	Envelope Feeder-A1	\$420.00
Hardware Accessories	_0563C005AA	Custom Media Cassette-A1	<input type="checkbox"/>	Custom Media Cassette-A1	\$420.00
Hardware Accessories	_0563C004AA	A5 Cassette-A1	<input type="checkbox"/>	A5 Cassette-A1	\$420.00
Hardware Accessories	_0563C001AA	Paper Feeder PF-B1	<input type="checkbox"/>	Paper Feeder PF-B1	\$420.00
Hardware Accessories	_0563C002AA	Paper Deck Unit-G1	<input type="checkbox"/>	Paper Deck Unit-G1	\$420.00
Hardware Accessories	_5858A006AA	Cabinet Type-T1	<input checked="" type="checkbox"/>	Cabinet Type-T1	\$429.00
Hardware Accessories	_5858A007AA	Stand Type-T	<input type="checkbox"/>	Stand Type-T	\$420.00
Hardware Accessories	_0563C008AA	User Maintenance KitA1	<input type="checkbox"/>	User Maintenance KitA1	\$420.00
System Connectivity Accessories	_0655A004AA	SD Card-C1	<input type="checkbox"/>	SD Card-C1	\$420.00
System Connectivity Accessories	_0660A018AA	Barcode Printing Kit-F1	<input checked="" type="checkbox"/>	Barcode Printing Kit-F1	\$420.00
Hardware Accessories	_0643A029AA	PCL Font Set-C1	<input type="checkbox"/>	PCL Font Set-C1	\$420.00
eCarePAK	_5707B090AA	eCarePAK Onsite 1-year (LBP351)	<input type="checkbox"/>	eCarePAK Onsite 1-year (LBP351)	\$420.00
eCarePAK	_5707B091AA	eCarePAK Onsite 2-year (LBP351)	<input type="checkbox"/>	eCarePAK Onsite 2-year (LBP351)	\$420.00
eCarePAK	_5707B092AA	eCarePAK Onsite 3-year (LBP351)	<input type="checkbox"/>	eCarePAK Onsite 3-year (LBP351)	\$420.00
eCarePAK	_5707B093AA	eCarePAK Onsite 4-year (LBP351)	<input type="checkbox"/>	eCarePAK Onsite 4-year (LBP351)	\$420.00
eCarePAK	_5707B094AA	eCarePAK Onsite 1-year (LBP352)	<input type="checkbox"/>	eCarePAK Onsite 1-year (LBP352)	\$420.00
eCarePAK	_5707B095AA	eCarePAK Onsite 2-year (LBP352)	<input type="checkbox"/>	eCarePAK Onsite 2-year (LBP352)	\$420.00
eCarePAK	_5707B096AA	eCarePAK Onsite 3-year (LBP352)	<input type="checkbox"/>	eCarePAK Onsite 3-year (LBP352)	\$420.00
eCarePAK	_5707B097AA	eCarePAK Onsite 4-year (LBP352)	<input type="checkbox"/>	eCarePAK Onsite 4-year (LBP352)	\$420.00

The 'Add Bundle' dialog also shows a 'Save' button at the bottom right.

The 'Products' tab shows a table of items:

Item#	Model	Description	Qty	MSRP
0562C002AB	imageCLASS LBP351dn	imageCLASS LBP351dn	2	\$2395.00
0563C001AA	Paper Feeder PF-B1	Paper Feeder PF-B1	2	\$420.00
5858A006AA	Cabinet Type-T1	Cabinet Type-T1	2	\$429.00

## How To: Manually Add a Bundle (No Catalog)

In the product tab of a proposal or order, you may add one or many bundles without using SalesChain's catalog, each representing one mainframe and its accessories.

To manually add a bundle:

1. Navigate to the *Products* tab
2. Click the *new bundle* button
3. Click *MANUAL ENTRY* in the new bundle dialogue box
4. Search for a machine with an equivalent service pricing value using drop-downs
5. Enter a quantity (How many machines of exactly this configuration you are selling. This defaults to 1)
6. Click *Add*
7. Enter the machine's item number, model number, MSRP, Rep Cost, sell value, a quantity per bundle and a brief description
8. Click *Save*
9. Click *Close* at the bottom right of the dialogue box

### Quick Tip:

Manual printers and copiers require the input of a service-equivalent machine. If this manual item does not require service (e.g., software) then check the box next to "exclude from service".

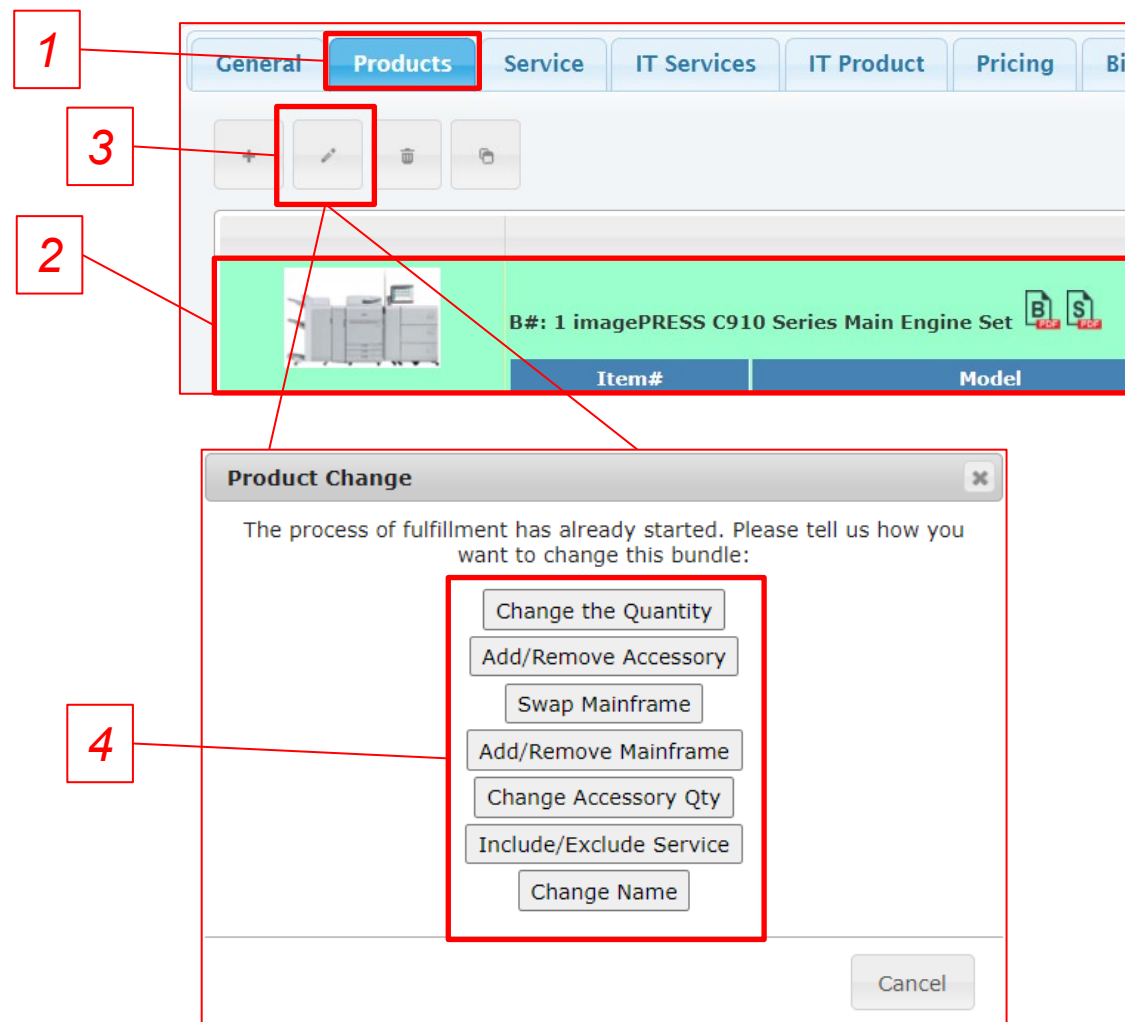
The first screenshot shows the 'Products' tab with a '+' button. The second screenshot shows the 'Add Bundle' dialog with 'MANUAL ENTRY' selected. The third screenshot shows the 'Add Bundle' dialog with a table of items to be added.

Pri	Item#	Model	Description	MSRP	RepCost\$	Sell	Qty Per Bundle	# Rep Units	# Rep Licenses
<input checked="" type="checkbox"/>	123456	987654321	Used c910 From Lease Return	15000	6000	10000	1	1	0

It is possible to edit bundles created in proposals and orders.

To edit a bundle:

1. Navigate to the *Products* tab
2. Select the bundle you would like to edit by clicking on it. The selected bundle will turn green.
3. Click the *edit bundle* button
4. Select the characteristic of the bundle you would like to edit and make your desired changes



It is possible to clone bundles created in proposals and orders.

To clone a bundle:

1. Navigate to the *Products* tab
2. Select the bundle you would like to clone by clicking on it. The selected bundle will turn green.
3. Click the *clone bundle* button
4. Make any desired changes to this cloned bundle
5. Click *Save*

**Clone Bundle**

Category: Copier-Color  
MFG: Canon  
Model: imagePRESS C910 Series Main Engine  
Package(s): Select  
Quantity: 1  
Search:   
Exclude From Service  
MANUAL ENTRY Save Cancel

Category	Item#	Model	Description	MSRP
Copier-Color	3238C002AB	imagePRESS C910 Series Main Engine Set	Color Laser Multifunction Copier up to 90 ppm	\$30,000.00
Speed License	3245C001AA	imagePRESS C810 Speed License	imagePRESS C810 Speed License	\$24,000.00
Accessory	3914C017AA	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	\$10,055.00
PRISMAsync Print Server LP Advanced Color Management Package	4007C034AA	Advanced Color Management Package	Advanced Color Management Package	\$7,700.00
Speed License	3245C001AA	imagePRESS C910 Speed License	imagePRESS C910 Speed License	\$24,000.00
PRISMAsync Print Server LP (Available on imagePRESS C)	3914C016AA	PRISMAsync Print Server for IPR C910-B1 Series and Control Panel Set	PRISMAsync Print Server for IPR C910-B1 Series and Control Panel Set	\$10,055.00
PRISMAsync Print Server (Available on imagePRESS C)	4007C030AA	IPR C910 PRISMAsync License Activation Set	IPR C910 PRISMAsync License Activation Set	\$15,000.00
PRISMAsync Print Server License Activation Kit and	3602C022AA	imagePRESS C910 License Kit + PRISMAsync V7 Software Licenses	imagePRESS C910 License Kit + PRISMAsync V7 Software Licenses	\$17,500.00
Accessory	4007C032AA	IPR C710 PRISMAsync LP License Activation Set	IPR C710 PRISMAsync LP License Activation Set	\$6,050.00
PRISMAsync Print Server LP Light Power Up Package	4007C033AA	PRISMAsync Light Power Up Package	PRISMAsync Light Power Up Package	\$4,800.00
Accessory	8002A005AB	X-Rite i1 PRO v2 (for imagePASS-B2 and ColorPASS-G4400)	X-Rite i1 PRO v2 (for imagePASS-B2 and ColorPASS-G4400)	\$1,300.00
PRISMAsync Print Server and PRISMAsync Print Service	4007C007AA	E-Shredding-H1	E-Shredding-H1	\$750.00
PRISMAsync Print Server and PRISMAsync Print Service	4007C011AA	DP Link-H1	DP Link-H1	\$3,000.00

Save Cancel

**B#: 1 imagePRESS C910 Series Main Engine Set**

Item#	Model	Description	Qty	MSRP
3238C002AB	imagePRESS C910 Series Main Engine Set	Color Laser Multifunction Copier up to 90 ppm	1	\$30000.00
3245C001AA	imagePRESS C810 Speed License	imagePRESS C810 Speed License	1	\$24000.00
3914C017AA	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	1	\$10550.00
4007C034AA	Advanced Color Management Package	Advanced Color Management Package	1	\$7700.00

**B#: 2 imagePRESS C910 Series Main Engine Set**

Item#	Model	Description	Qty	MSRP
3238C002AB	imagePRESS C910 Series Main Engine Set	Color Laser Multifunction Copier up to 90 ppm	1	\$30000.00
3245C001AA	imagePRESS C810 Speed License	imagePRESS C810 Speed License	1	\$24000.00
3914C017AA	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	1	\$10550.00
4007C034AA	Advanced Color Management Package	Advanced Color Management Package	1	\$7700.00

The line-item view provides a table style display of products on a proposal or order.

## Key:

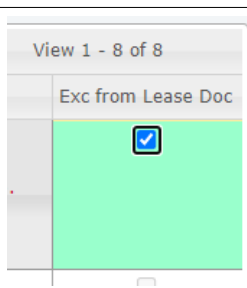
- 1) Add a new bundle
- 2) Select a bundle (show only items from the selected bundle)
- 3) Return to the *bundle view*.. (See Page 95)
- 4) Mainframes are displayed in yellow
- 5) Accessories are displayed in white below their mainframes

## Quick Tips:

It is possible to exclude certain bundles from lease documentation by scrolling to the right and checking the box in the *exclude from lease documents* column.

The screenshot shows the 'Products' tab selected in the top navigation bar. A red box labeled '1' highlights the '+ Bundle(s): Select' dropdown. A red box labeled '2' highlights the 'Bundle(s): Select' dropdown. A red box labeled '3' highlights the grid icon in the top right corner. A red box labeled '4' highlights the mainframe items (yellow background). A red box labeled '5' highlights the accessory items (white background) below the mainframes.

B#	Item#	Name	Bundle Qty	Qty Per Bundle	Total Qty	Model	Description	MSRP	Footnote
1	3238C002AB	Canon	1	1	1	ImagePRESS C910 Series Main Engine Set	Color Laser Multifunction Copier up to 90 ppm	\$30,000.00	1Ships standard with 550 sheets x 3 paper cassette Attachment Kit Envelope Attachment Kit Gradation Color Universal Send (not available with PRISMAsy You must add one of the printer controllers.; 2Req Finisher-W1 Booklet Finisher-W1 or High Capacity either Duplex Image Reader-M1 or Printer Cover-f
1	3245C001AA	Canon	1	1	1	ImagePRESS C810 Speed License	ImagePRESS C810 Speed License	\$24,000.00	
1	3914C017AA	Canon	1	1	1	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	\$10,550.00	1Includes PRISMAsync Controller Operator Panel C (Available for both C710 andamp; C810)X-Rite i1B not included but highly recommended.; 3IPR C710 Activation Set must be ordered
1	4007C034AA	Canon	1	1	1	Advanced Color Management Package	Advanced Color Management Package	\$7,700.00	1Requires PRISMAsync Print Server LP (3914C017 (8002A005AB). Includes Advanced Color Managen
2	3238C002AB	Canon	1	1	1	ImagePRESS C910 Series Main Engine Set	Color Laser Multifunction Copier up to 90 ppm	\$30,000.00	1Ships standard with 550 sheets x 3 paper cassette Attachment Kit Envelope Attachment Kit Gradation Color Universal Send (not available with PRISMAsy You must add one of the printer controllers.; 2Req Finisher-W1 Booklet Finisher-W1 or High Capacity either Duplex Image Reader-M1 or Printer Cover-f
2	3245C001AA	Canon	1	1	1	ImagePRESS C810 Speed License	ImagePRESS C810 Speed License	\$24,000.00	
2	3914C017AA	Canon	1	1	1	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	\$10,550.00	1Includes PRISMAsync Controller Operator Panel C (Available for both C710 andamp; C810)X-Rite i1B not included but highly recommended.; 3IPR C710 Activation Set must be ordered
2	4007C034AA	Canon	1	1	1	Advanced Color Management Package	Advanced Color Management Package	\$7,700.00	1Requires PRISMAsync Print Server LP (3914C017 (8002A005AB). Includes Advanced Color Managen



## Proposal and Order Pricing: The Service Tab

The service tab of the order breakdown allows users to comprehensively view, edit and alter service pricing details for this proposal or order.

### Key:

- 1) Select contract type and term
- 2) Jump to blended view ([See page 105](#))
- 3) Set service rate to different pricing tiers (value and number of tiers may vary by system configuration)
- 4) Switch to the audit view
- 5) Add a zero-cost service item ([See page 106](#))
- 6) Create a new service group
- 7) Service pricing method (Machine level or Blended) and group name (Standard is *Default*)
- 8) Mainframe name
- 9) Base rate commitment boxes
- 10) Service details
- 11) Estimated and Actual Payment value
- 12) Charge back and override value
- 13) Adjustments (may vary by system configuration)
- 14) Fixed pricing/escalation controls
- 15) Cost/profit summary

The screenshot shows the 'Service' tab of the order breakdown. The interface includes a top navigation bar with tabs: General, Products, Service, IT Services, IT Product, Pricing, Bid Desk, Billing, Finance, Delivery, Commissions, Wizard, and Documents. The 'Service' tab is active, displaying 'Service Details (NNC)'. The left sidebar contains sections for Contract Type, Term, Base Bill, Est Pymt, Act Pymt, PB Charge Back, Override CBS, Comments, Adjustment(s), Fixed Pricing, and Cost/Profit Summary. The main area shows a table of service items with columns: Meter, Rate, Allowance, Overage, Fixed Amount, Sell Rate, Total, and Owned By. The table lists items like '1-1-imagePRESS C910 Series Main Engine Set' and '3-1-imageCLASS LBP351dn'. Red boxes and numbers 1 through 15 highlight specific features and fields as defined in the key.

Meter	Rate	Allowance	Overage	Fixed Amount	Sell Rate	Total	Owned By
<b>Default (M-CPC)</b>							
<b>1-1-imagePRESS C910 Series Main Engine Set</b>							
Monochrome	0.00867	500	0.00867	\$0.00	0.00867	\$4.34	
Color	0.06988	5000	0.06988	\$0.00	0.06988	\$349.40	
<b>2-1-imagePRESS C910 Series Main Engine Set</b>							
Monochrome	0.00867	500	0.00867	\$0.00	0.00867	\$4.34	
Color	0.06988	5000	0.06988	\$0.00	0.06988	\$349.40	
<b>3-1-imageCLASS LBP351dn</b>							
Monochrome	0.00867	500	0.00867	\$0.00	0.00867	\$4.34	
<b>3-2-imageCLASS LBP351dn</b>							
Monochrome	0.00867	500	0.00867	\$0.00	0.00867	\$4.34	

Column	Description
Rate	The dollar value charged to the customer for each page printed by this machine. Color machines will display a black & white and a color rate.
Allowance	The number of prints from this machine allowed to a customer on a monthly Basis. Any prints over this value will be charged at the overage rate. Color machines will display a black & white and a color allowance.
Overage	The dollar value charged to the customer for each page printed in excess of the allowance. Color machines will display a black & white and a color overage.
Fixed Amount	A fixed value to be charged to the customer for this machine regardless of print volume.
Sell Rate	Additional fixed amount for service on a monthly basis that can be entered.
Total	The total value a customer is committing to pay on a monthly basis. This value is calculated as the Rate times the allowance. If this is a CPC contract, this will show as a \$0.00 value.
Owned By	Designates whether the machine is owned, leased or rented by the customer.

## How To: Change Your Service Contract Type

It is possible to have many service contract types configured within the SalesChain system. You may change the contract type of any proposal or order in the **Service** tab of the order breakdown.

To change your service contract type:

1. Navigate to the *Service* tab
2. Open the *Contract Type* drop-down and select the contract type you would like
3. Click *OK* in your browser to confirm this change

The screenshot shows the 'Service Details (NNC)' form in the SalesChain system. The 'Service' tab is selected, indicated by a red box and callout 1. The 'Contract Type' drop-down menu is open, showing options like 'Volume Commitment', '- Contract Type -', 'ProSource Service', and 'No Service'. A red box and callout 2 highlight this menu. At the bottom of the form, a confirmation dialog box is displayed with the text 'www.mysaleschain.com says Are you sure, this will reset service lines and grouping ?'. The 'OK' button in this dialog is highlighted with a red box and callout 3.

### Quick Tip:

You may see changes take effect across the service screen. For example, CPC contracts will un-check all the volume commitment boxes, *no service* will remove all line items entirely.

## How To: Change Service Rates, Allowances, and Overages

It is possible to change rates, allowances and overages in the service tab table. See page 102 for an explanation of service pricing terms.

To change basic values in the service tab's table:

1. Navigate to the *Service* tab
2. **Click on the number** of the value in the table you would like to edit (Color Allowance In this example)
3. Type the value you would like
4. Hit the *Enter* key on your keyboard to make the change take effect

### Quick Tip:

If you have blended your service rates between multiple machines, you will not be able to edit machine level allowances. See page 105 for how to blend and remove blending from your service contract.

1

General	Products	<b>Service</b>	IT Services
---------	----------	----------------	-------------

2

Meter		Rate	Allowance
Default (M-CPC)			
1-1-imagePRESS C910 Series Main Engine Set			
Monochrome	<input checked="" type="checkbox"/>	0.00867	500
Color	<input checked="" type="checkbox"/>	0.06988	5000

3

Meter		Rate	Allowance	
Default (M-CPC)				
1-1-imagePRESS C910 Series Main Engine Set				
Monochrome	<input checked="" type="checkbox"/>	0.00867	500	0.00867
Color	<input checked="" type="checkbox"/>	0.06988	4500	0.06988

4

Meter		Rate	Allowance	
Default (M-CPC)				
1-1-imagePRESS C910 Series Main Engine Set				
Monochrome	<input checked="" type="checkbox"/>	0.00867	500	0.00867
Color	<input checked="" type="checkbox"/>	0.06988	4500	0.06988
2-1-imagePRESS C910 Series Main Engine Set				

## How To: Price Blended Service

It is possible to price service with a shared allowance (click rates) across multiple machines.

To price blended service:

1. Navigate to the *Service* tab
2. Click the *blended view* button
3. Click on and change any value in the table
4. Hit *Enter* on your keyboard. The top will now display B-CPC instead of M-CPC

### Quick Tip:

- If you have blended your service rates between multiple machines, you will not be able to edit machine level allowances.
- To return to machine level pricing, click the *M-CPC* button.

M-CPC

1. **Service** tab selected

2. **Blended view** button (grid icon) selected

Meter	Rate	Allowance	Overage	Fixed Amount	Sell Rate	Total	Owned By
<b>Default (M-CPC)</b>							
<b>1-1-imagePRESS C910 Series Main Engine Set</b>							
Monochrome	0.00867	500	0.00867	\$0.00	0.00867	\$4.34	
Color	0.06988	5000	0.06988	\$0.00	0.06988	\$349.40	

3. **Blended view** button selected, **Default (M-CPC)** selected, **Color** row selected, **10000** entered in Allowance column

Meter	Rate	Allowance	Overage	Fixed Amount	Sell Rate	Total
<b>Default (M-CPC) X</b>						
Monochrome	0.00867	2000	0.00867	\$0.00	0.00867	\$17.34
Color	0.06988	10000	0.06988	\$0.00	0.06988	\$698.80

4. **Blended view** button selected, **Default (B-CPC)** selected, **12000** entered in Allowance column

Manager override occurred

Meter	Rate	Allowance	Overage	Fixed Amount	Sell Rate	Total
<b>Default (B-CPC) X</b>						
Monochrome	0.00867	2000	0.00867	\$0.00	0.00867	\$17.34
Color	0.06988	12000	0.06988	\$0.00	0.06988	\$838.56

## How To: Price a Service Takeover

It is possible to add a service contract without adding a machine to the deal (zero cost service) using the service tab in the order breakdown.

To add a service only item:

1. Navigate to the *Service* tab
2. Click the *add zero cost service* button
3. a) Search for the model of the machine (or a service equivalent machine) that you intend to take over service for. Use the drop-downs or search for the model in the search box. b) Alternatively, import an FMAudit or Printfleet meter read file.
4. Use the *Owned By* drop down to designate this as a dealer-owned or a customer-owned machine
5. Click *Save*

The screenshot shows the 'Service Takeover' form with the following elements highlighted by numbered callouts:

- 1:** The 'Service' tab in the top navigation bar.
- 2:** The '+ Add' button in the 'Products' section.
- 3a:** The 'Category' dropdown menu set to 'Copier-Color'.
- 3b:** The 'MFG' dropdown menu set to 'Canon' and the 'Model' dropdown menu set to 'ImageRUNNER ADVANCE C5560i'.
- 4:** The 'Owned By' dropdown menu set to 'Dealer'.
- 5:** The 'Save' button at the bottom right of the form.

The form also includes a search box, a table of items, and checkboxes for 'FMAudit' and 'PrintFleet'.

Product	Name	Item#	Model	Description
Copier	Copier-Color	_0602C003BB	ImageRUNNER ADVANCE C5560i	Color Laser Multifunction Copier Up To 60 ppm
Hard	Hardware Accessories	_0610C002AA	High Capacity Cassette Feeding Unit-A1 (Letter)	High Capacity Cassette Feeding Unit-A1 (Letter)
Hard	Hardware Accessories	_0609C002AA	Cassette Feeding Unit-A1	Cassette Feeding Unit-A1
Hard	Hardware Accessories	_0607C002AA	Paper Deck Unit-F1 (Letter)	Paper Deck Unit-F1 (Letter)
Hard	Hardware Accessories	_9611B001AA	Inner 2way Tray-J1	Inner 2way Tray-J1
Hard	Hardware Accessories	_0618C002AA	Inner Finisher 2/3 Hole Puncher-B1	Inner Finisher 2/3 Hole Puncher-B1
Hard	Hardware Accessories	_0613C002AA	Staple Finisher-Y1	Staple Finisher-Y1
Hard	Hardware Accessories	_0614C002AA	Booklet Finisher-Y1	Booklet Finisher-Y1
Hard	Hardware Accessories	_0619C002AA	Buffer Pass Unit-L1	Buffer Pass Unit-L1
Hard	Hardware Accessories related to Finisher	_0126C001AA	2/3 Hole Puncher Unit-A1 (for Staple Finisher-V2 or Booklet Finisher-V2)	2/3 Hole Puncher Unit-A1 (for Staple Finisher-V2 or Booklet Finisher-V2)

### Quick Tip:

Service Takeovers will be highlighted in yellow in the table and can be edited in the same way as other equipment in the deal. Click the blue X to remove this line item.

4-1-imageRUNNER ADVANCE C5560i X			
<input type="checkbox"/>	Monochrome	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Color	<input checked="" type="checkbox"/>	

## How To: Group Machines for Service

It is possible to group machines in the service tab so that you can create multiple bundles or group machines on generated service documents.

To create service groups:

1. Navigate to the **Service** tab
2. Click the **Group** button
3. In the *group service* dialogue box, click the **New Group** button
4. Enter a name for this new group
5. Select the machines that should be added to this new group
6. Click **Save & New**
7. Repeat steps 3-6 for as many groups as you would like to create.

The screenshot shows the 'Service' tab in the top navigation bar. Below it, the 'Group' button is highlighted. The 'Group Service' dialog box is open, showing the 'New Group' button. The 'Group Name' field is filled with 'B&W Printers'. The 'SeqNbr' is 2. The 'Select From' dropdown is set to 'All'. The table below shows the selection of machines:

	B#	M#	MFGName	Item#	Model
<input type="checkbox"/>	1	1	Canon	_3238C002AB	imagePRESS C910 Series Main Engine Set
<input type="checkbox"/>	2	1	Canon	_3238C002AB	imagePRESS C910 Series Main Engine Set
<input checked="" type="checkbox"/>	3	1	Canon	_0562C002AB	imageCLASS LBP351dn
<input checked="" type="checkbox"/>	3	2	Canon	_0562C002AB	imageCLASS LBP351dn

The 'Save & New' button is highlighted at the bottom right of the dialog box.

### Quick Tip:

Group names will be displayed in the *group service* dialogue, the service tab and will display on generated service documents.

<input type="checkbox"/>	B#	M#
<b>BnWPrinters</b>		
<input type="checkbox"/>	3	1
<input type="checkbox"/>	3	2
<b>Copiers</b>		
<input type="checkbox"/>	1	1
<input type="checkbox"/>	2	1

<b>Copiers (M-CPC)</b>	
<input type="checkbox"/> 1-1-imagePRESS C910 Series Main Engine Set	Monochrome <input checked="" type="checkbox"/>
	Color <input checked="" type="checkbox"/>
<input type="checkbox"/> 2-1-imagePRESS C910 Series Main Engine Set	Monochrome <input checked="" type="checkbox"/>
	Color <input checked="" type="checkbox"/>
<b>BnWPrinters (M-CPC)</b>	
<input type="checkbox"/> 3-1-imageCLASS LBP351dn	Monochrome <input checked="" type="checkbox"/>
<input type="checkbox"/> 3-2-imageCLASS LBP351dn	Monochrome <input checked="" type="checkbox"/>

## Proposal and Order Pricing: The IT Services Tab

The *IT Services* tab of the order breakdown allows users to add IT services to proposals and orders and target specific price points.

**Key:**

- 1) Add IT Services
- 2) Delete Selected IT Service
- 3) IT Services Details
- 4) Scenario Pricing Tool
- 5) Cost/profit summary

1 2 3

Model	SKU	Qty	Rep Cost	Sell Price	Total	GP\$
Cloud Desktop additional Storage GB	IT7	25	\$0.72	\$1.11	\$27.75	\$9.75
eFax Service Pro Plan	IT19	1	\$28.78	\$44.28	\$44.28	\$15.50
Hosted Exchange 50GB 36 Months	IT26	1	\$5.40	\$8.31	\$8.31	\$2.91

4 5

Scenario: SCENARIO  GO

# Users:

Cost Per User:

Contract Start Date:

Contract Term:

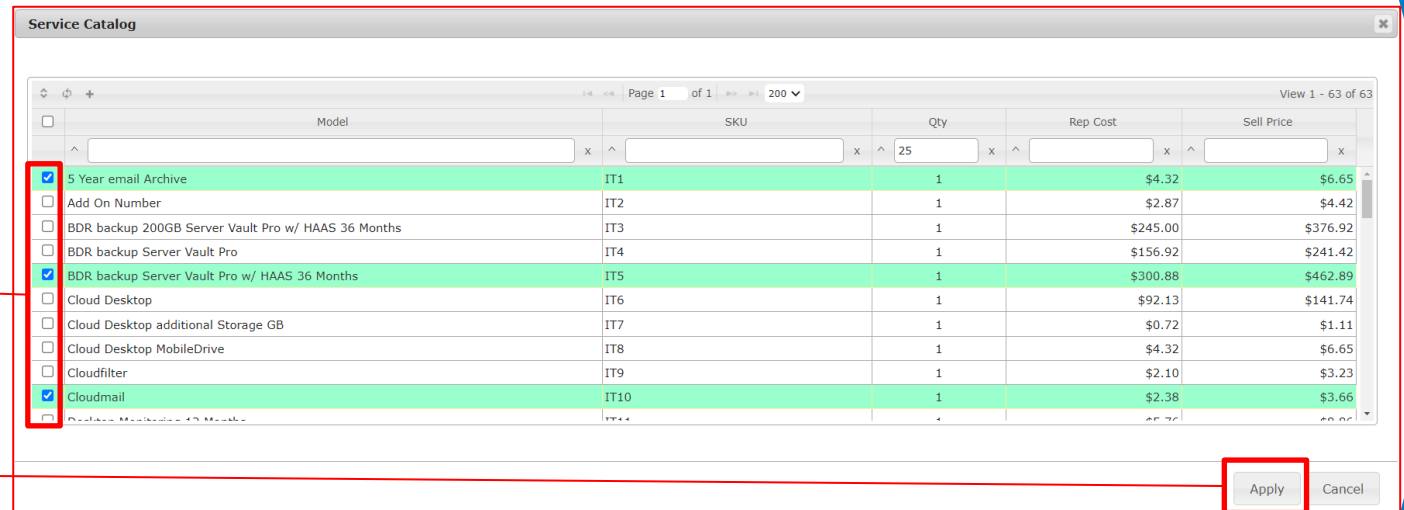
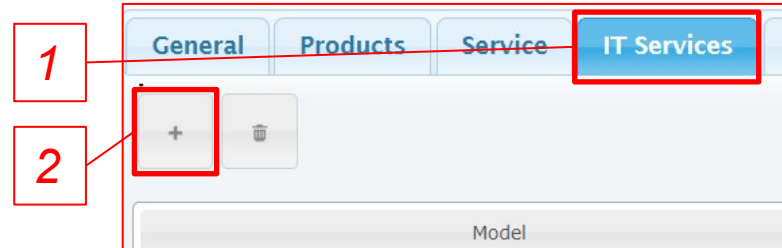
	Revenue	GP
Monthly Bill:	\$80.34	\$28.16
Annual Value:	\$964.08	\$337.92
Total Contract Value:	\$2,892.24	\$1,013.76

## How To: Add IT Services To A Proposal or Order

It is possible to add IT services to a proposal or an order by themselves or combine them with print hardware and IT product sales.

To add an IT service item:

1. Navigate to the *IT Services* Tab
2. Click the *Add IT Services* button
3. Select the services you would like to add using the check boxes
4. Click *Apply*



### Quick Tips:

- When adding products, you can use the column headers in the service catalog dialogue to search for products by name, SKU and more rather than scrolling alphabetically.
- (Right) To adjust quantities, click on the quantity number after adding this service.

Model	SKU	Qty	Rep Cost
5 Year email Archive	IT1	25	\$4.32
BDR backup Server Vault Pro w/ HAAS 36 Months	IT5	1	\$300.88
Cloudmail	IT10	1	\$2.38
Desktop Monitoring 36 Months	IT13	1	\$5.76

**It is possible to manipulate the costs of a series of IT services on a proposal to find round numbers or fit difficult pricing situations using the scenario pricing tool.**

To use the scenario pricing tool:

1. Navigate to the *IT Services* Tab
2. Select the scenario you would like to solve for from the *SCENARIO* drop-down.
3. If solving for *Cost Per User* add the number of users in the designated field.
4. Enter your target value (in this example 35 represents \$35/user/month.)
5. Click *GO*
6. Click the red *Save* button in the top right-hand corner.

## How To: Scenario Pricing in the IT Services Tab

The screenshot shows the 'IT Services' tab selected. A table lists services: 'BDR backup Server Vault Pro w/ HAAS 36 Months' (IT5), 'Cloudmail' (IT10), and 'Desktop Monitoring 36 M' (IT13). A 'SCENARIO' dropdown menu is open, showing options: 'Cost Per User' (selected), 'Gross Profit%', and 'Gross Profit\$'. Below the dropdown, the 'Scenario:' field is set to 'Cost Per User'. The '# Users:' field contains '25'. The 'Cost Per User:' field shows '\$37.69'. The 'Contract Start Date:' is '01/16/2022' and the 'Contract Term:' is '36'. A target value of '35' is entered in a field next to the 'GO' button. At the bottom, there are 'Back', 'Save' (highlighted with a red box), and 'Remove' buttons.

## Proposal and Order Pricing: The IT Products Tab

The *IT Products* tab of the order breakdown allows users to add IT products to proposals and orders and target specific price points.

**Key:**

- 1) Add IT Products Bundle
- 2) Import QuoteWerks Quote
- 3) Select Payment Terms
- 4) Enter Down Payment Value
- 5) Total and Total GP Values
- 6) Note Entry
- 7) Bundles of IT Products are displayed in the table.
- 8) Invoice Summary

The screenshot shows the IT Products tab interface. At the top, there are buttons for adding bundles (1) and importing quotes (2). Below these is a table of IT products (7) with columns for Item, Source Vendor, Bundle Qty, Qty Per Bundle, Total Qty, MSRP, Dealer Cost, Rep Cost, Sell Price, Total, and GP\$. The table lists several monitors and displays from vendors like TechData and NewEgg. Below the table, there are fields for Payment Terms (3) and Down Payment (4). To the right, there are fields for Total and Total GP (5). At the bottom right, there is a Note entry field (6). At the bottom left, there is an Invoice Summary table (8) with columns for Seq#, Amount, and Date.

Item	Source Vendor	Bundle Qty	Qty Per Bundle	Total Qty	MSRP	Dealer Cost	Rep Cost	Sell Price	Total	GP\$
1-Test edit X										
24" Monitor	TechData	25	1	25	\$169.00	\$131.26	\$175.01	\$194.46	\$4,861.50	\$486.25
23.6" Backlit Monitor	TechData	25	1	25	\$115.00	\$95.35	\$127.13	\$141.26	\$3,531.50	\$353.25
2-Test 2 edit X										
23.6" Monitor	TechData	1	1	1	\$115.00	\$96.50	\$128.67	\$142.97	\$142.97	\$14.30
22" Display	TechData	1	1	1	\$94.06	\$94.06	\$125.41	\$139.34	\$139.34	\$13.93
21.5" Monitor	NewEgg	1	1	1	\$160.00	\$130.00	\$173.33	\$192.59	\$192.59	\$19.26

Seq#	Amount	Date
1	\$8,867.90	1/21/2022

# Proposal & Order Pricing: Pricing Tab

The *Pricing Tab* serves as a subtotal page that provides details and summaries regarding the given contract.

## Key:

- 1) Equipment or Adjustments Summary Table
- 2) Select Equipment or Adjustments View
- 3) Pricing Details
- 4) Financing Summary
- 5) Scenario Pricing Tool
- 6) Cost/Profit Summary
- 7) Soft costs (entry and Summary)
- 8) Add a note to this deal (Internal Only)
- Scroll Down on Page ---
- 9) Service Summary
- 10) IT Services Summary
- 11) IT Products Summary

## Quick Tip:

Scroll down within the pricing tab to view items 9-11

General

Products

Service

IT Services

IT Product

Pricing

Bid Desk

Billing

Finance

Delivery

Commissions

Wizard

Documents

Page 1 of 0

500

View 1 - 11 of 12

B#	Model	MFGItem#	Description	Qty	MSRP	RepCost\$	Credit	Sell	Total\$	Level	Meters/Mo	RS\$/Yr
1	imagePRESS C910 Series Main Engine Set	_3238C002AB	Color Laser Multifunction Copier up to 90 ppm	1	\$30,000.00	\$14,000.00	\$0.00	\$23,333.32	\$23,333.32	House	\$0.00	\$
1	imagePRESS C810 Speed License	_3245C001AA	imagePRESS C810 Speed License	1	\$24,000.00	\$11,500.00	\$0.00	\$19,166.67	\$19,166.67	House	\$0.00	\$
1	PRISMAsync Print Server LP for iPR C710-B1 Series and Control Panel Set	_3914C017AA	PRISMAsync Print Server LP for iPR C710-B1 Series and Control Panel Set	1	\$10,550.00	\$6,250.00	\$0.00	\$10,416.67	\$10,416.67	House	\$0.00	\$
1	Advanced Color Management Package	_4007C034AA	Advanced Color Management Package	1	\$7,700.00	\$4,600.00	\$0.00	\$7,666.67	\$7,666.67	House	\$0.00	\$
2	imagePRESS C910 Series Main Engine Set	_3238C002AB	Color Laser Multifunction Copier up to 90 ppm	1	\$30,000.00	\$14,000.00	\$0.00	\$23,333.33	\$23,333.33	House	\$0.00	\$

Equipment

Adjustments

Pricing Details (NNC)

Price Level: House

Credit Level: - Optional -

Contract#:

Date Appr: 01/06/2022

Bid Desk Request

Financing Summary

SLevel: Standard

Company: DLL

Product: \$1 OUT

Term: 36

Level: 3,001 - 250,000

Factor: 0.034578

Override Factor

Financed\$: \$154,239.33

%MSRP: 82.22%

Eq Pymt\$: \$6,333.29

Soft Costs: \$0.00

Soft Cost%: 0.00%

Proposal Summary

24mo

36mo

48mo

60mo

\$7536

\$5333

\$4185

\$3603

Cost/Profit Summary

Total Buy\$: \$92,543.60

MFG Credit\$: \$0.00

Adj Buy\$: \$92,543.60

Total Sell\$: \$154,239.33

Base GPS: \$61,695.73

Adjusted GPS: \$61,695.73

Total MSRPs: \$187,590.00

Spiff1\$: \$0.00

Spiff2\$: \$0.00

Bonus\$: \$0.00

Scenario Pricing

Lock Accessory Pricing

No Charge Accessories

Supplies at Cost\$

Scenario: Gross Profit%

Target: 40

Calculate Scenario

Postage Summary

MetersS/Mo: \$0.00

RSS/Yr: \$0.00

SUBTOTAL: \$154,239.33

Service Give Away(b): \$0.00

Supplies if no BaseS(b): \$0.00

Misc Deduction (b): \$0.00

Misc Credit (b): \$0.00

Service In Lease(t)(f)(b): \$0.00

Service Not In Lease(t)(b): \$0.00

ITPS In Lease(t)(f)(b): \$0.00

ITPS Not In Lease(t)(b): \$0.00

BOARD CREDIT: \$154,239.33

Delivery(f): \$0.00

Connectivity Fee(f): \$0.00

Lease Nbr / Buyout (f): \$0.00

Upfront Supplies(f): \$0.00

Misc Fees (f): \$0.00

Misc Test Adj (t)(f): \$0.00

GRAND TOTAL: \$154,239.33

Note:

## How to: Change Values in the Equipment Subtab

The *Equipment* subtab provides information regarding equipment cost.

**Important:** Only users with designated permission can change certain values in this table.

To change values in the *Equipment* subtab:

1. Click on the Pricing tab
2. Select *Equipment* from tabs below the table
3. Click on the value you would like to change. **Note:** Be sure to click the number, not just the cell in the table
4. Enter the desired value
5. Hit enter on your keyboard to make the change take effect

### Quick Tip:

Edited fields which have a direct effect on profitability will be highlighted in yellow.

The screenshot shows the SalesChain interface with the Pricing tab selected. Below the main table, the Equipment subtab is active. The Equipment table lists various items with columns for Qty, MSRP, RepCost\$, and Credit. A callout box 1 points to the Pricing tab. Callout box 2 points to the Equipment subtab. Callout box 3 points to the RepCost\$ column in the Equipment table. Callout box 4 points to the RepCost\$ value of 12500.00, which is highlighted in yellow. Callout box 5 points to the RepCost\$ value of 12,500.00, which is also highlighted in yellow.

B#	Model	MFGItem#	Description	Qty	MSRP	RepCost\$	Credit	Sell	Total\$	Level	Meter\$/Mo
1	imagePRESS C910 Series Main Engine Set	_3238C002AB	Color Laser Multifunction Copier up to 90 ppm	1	\$30,000.00	\$14,000.00	\$0.00	\$23,333.32	\$23,333.32	House	\$0.00
1	imagePRESS C810 Speed License	_3245C001AA	imagePRESS C810 Speed License	1	\$24,000.00	\$11,500.00	\$0.00	\$19,166.67	\$19,166.67	House	\$0.00
1	PRISMAsync Print Server LP for iPR C710-B1 Series and Control Panel Set	_3914C017AA	PRISMAsync Print Server LP for iPR C710-B1 Series and Control Panel Set	1	\$10,550.00	\$6,250.00	\$0.00	\$10,416.67	\$10,416.67	House	\$0.00
1	Advanced Color Management Package	_4007C034AA	Advanced Color Management Package	1	\$7,700.00	\$4,600.00	\$0.00	\$7,666.67	\$7,666.67	House	\$0.00
2	imagePRESS C910 Series Main Engine Set	_3238C002AB	Color Laser Multifunction Copier up to 90 ppm	1	\$30,000.00	\$14,000.00	\$0.00	\$23,333.33	\$23,333.33	House	\$0.00

Qty	MSRP	RepCost\$	Credit
1	\$30,000.00	12500.00	\$0.00
1	\$24,000.00	\$11,500.00	\$0.00
1	\$10,550.00	\$6,250.00	\$0.00

Qty	MSRP	RepCost\$	Credit
1	\$30,000.00	\$12,500.00	\$0.00
1	\$24,000.00	\$11,500.00	\$0.00
1	\$10,550.00	\$6,250.00	\$0.00

SUBTOTAL: \$154,239.33

## How to: Change Values in the Adjustments Subtab

The *Adjustments* subtab provides information regarding any delivery and installation costs.

To change values in the *Adjustments* subtab:

1. Click on the Pricing tab
2. Select *Adjustments* from tabs below the table
3. Click on the value you would like to change (in this example, the connectivity fee) *Note: Be sure to click the number, not just the cell in the table*
4. Enter the desired value
5. Hit enter on your keyboard to make the change take effect

The screenshot shows the SalesChain interface with the Pricing tab selected. Below the main table, the Adjustments subtab is active. The Adjustments subtab contains a table with columns #RU, ABC, and CONN. The value 50 is entered in the CONN column for #RU 1.

**Step 1:** Click on the Pricing tab.

**Step 2:** Select Adjustments from tabs below the table.

**Step 3:** Click on the value you would like to change (in this example, the connectivity fee) *Note: Be sure to click the number, not just the cell in the table*.

**Step 4:** Enter the desired value.

**Step 5:** Hit enter on your keyboard to make the change take effect.

B#	Model	MFGItem#	Description	Qty	Meters/Mo	RSS/Yr	TotMtr\$/Mo	TotRSS/Yr	#RU	ABC	CONN
1	imagePRESS C910 Series Main Engine Set	_3238C002AB	Color Laser Multifunction Copier up to 90 ppm	1	\$10.00	\$0.00	\$10.00	\$0.00	1	\$0.00	\$0.00
1	imagePRESS C810 Speed License	_3245C001AA	imagePRESS C810 Speed License	1	\$0.00	\$0.00	\$0.00	\$0.00	0	\$0.00	\$0.00
1	PRISMAsync Print Server LP for iPR C710-B1 Series and Control Panel Set	_3914C017AA	PRISMAsync Print Server LP for iPR C710-B1 Series and Control Panel Set	1	\$0.00	\$0.00	\$0.00	\$0.00	0	\$0.00	\$0.00
1	Advanced Color Management Package	_4007C034AA	Advanced Color Management Package	1	\$0.00	\$0.00	\$0.00	\$0.00	0	\$0.00	\$0.00
2	imagePRESS C910 Series Main Engine Set	_3238C002AB	Color Laser Multifunction Copier up to 90 ppm	1	\$0.00	\$0.00	\$0.00	\$0.00	1	\$0.00	\$0.00

**Subtotal:** \$154,239.33  
Service Give Away(h): \$0.00

#RU	ABC	CONN
1	\$0.00	50
0	\$0.00	\$0.00

#RU	ABC	CONN
1	\$0.00	\$50.00
0	\$0.00	\$0.00

## How to: Change a Deal's Price Level

The *Pricing Details* section of the pricing tab allows you to change a proposal or order's price level.

*Important: If no pricing data for a selected pricing level exists for certain equipment on the deal, the price level might not change. Consult the Equipment subtab (per step 3 below) to see what price level machines are being priced at.*

To change a proposal or order's price level:

1. Click on the Pricing tab
2. In the *Pricing Details* Section, select the price level you would like from the *Price Level* drop down.
3. Reference the *Level* column in the *Equipment* subtab to be sure that the price level has changed for all your equipment (See important note above).

### Quick Tip:

Pricing levels can be permissioned so that only certain users have access to certain price levels, like manager discounts. Contact your system administrator if there is a price level that you are not seeing and should have access to or submit a bid desk request ([page 117](#)) if you need a deal priced at a level you do not have access to.

The screenshot shows the 'Pricing' tab selected in the top navigation bar. Below it, the 'Pricing Details (NNC)' section is visible. A dropdown menu for 'Price Level' is open, showing options: 'House', 'SELECT', 'Cost', 'House', and 'Maximus'. Below this, there are fields for 'Contract#:', 'Date Appr:', 'SLevel:', and 'Company:'. At the bottom, a table lists equipment items with columns: Qty, MSRP, RepCost\$, Credit, Sell, Total\$, and Level. The 'Level' column shows 'House' for all items.

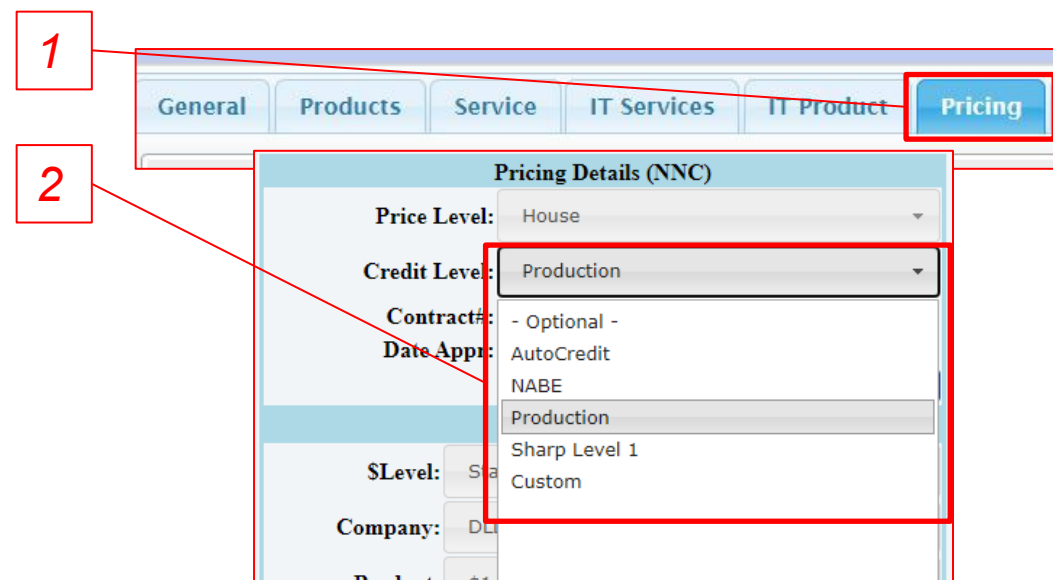
Qty	MSRP	RepCost\$	Credit	Sell	Total\$	Level
1	\$30,000.00	\$14,000.00	\$0.00	\$23,716.75	\$23,716.75	House
1	\$24,000.00	\$11,500.00	\$0.00	\$19,481.62	\$19,481.62	House
1	\$10,550.00	\$6,250.00	\$0.00	\$10,587.84	\$10,587.84	House
1	\$7,700.00	\$4,600.00	\$0.00	\$7,792.65	\$7,792.65	House
1	\$30,000.00	\$14,000.00	\$0.00	\$23,716.75	\$23,716.75	House

## How to: Change a Deal's Credit Level

The *Pricing Details* section of the pricing tab allows you to change a proposal or order's credit level.

To change a proposal or order's credit level:

1. Click on the Pricing tab
2. In the *Pricing Details* Section, select the price level you would like from the *Credit Level* drop down.



### Quick Tip:

Credit levels can be permissioned so that only certain users have access to certain price levels, like manager discounts. Contact your system administrator if there is a credit level that you are not seeing and should have access to or submit a bid desk request ([page 117](#)) if you need a deal priced at a level you do not have access to.

The *Pricing Details* section of the pricing tab allows sales reps to submit a bid desk request. A bid desk request allows sales reps to ask managers, admins or ownership for assistance in tricky pricing situations by sending them a message.

To submit a bid desk request:

1. Click on the Pricing tab
2. In the *Pricing Details* section, click on the *Big Desk Request* button
3. Enter a detailed description of the request you are making to your manager in the text box of the pop up
4. Click Save
5. Click OK in the confirmation pop-up

## How to: Submit a Bid Desk Request

The screenshot illustrates the process of submitting a bid desk request through the SalesChain system. The interface is divided into several sections:

- Step 1:** The **Pricing** tab is selected in the top navigation bar.
- Step 2:** In the **Pricing Details (NNC)** section, the **Bid Desk Request** button is clicked.
- Step 3:** A pop-up window titled **Bid Desk Request** appears. A text box contains the following note: "Note: Need to use Manager price level here. Can we make that work to win this bigger deal? We can boost service cost if that helps. |".
- Step 4:** The **Save** button is clicked in the pop-up window.
- Step 5:** A confirmation message appears at the bottom: "www.mysaleschain.com says Bid Desk request submitted." with an **OK** button.

## How to: Change a Deal's \$Level

The *Financing Summary* section of the pricing tab allows you to change the \$Level of a leased proposal or order.

*Important: If you change the \$Level, you will need to re-select the company, product, term, level and factor.*

To change a proposal or order's \$level:

1. Click on the Pricing tab
2. In the *Financing Summary* Section, select the \$Level you would like from the \$Level drop down
3. Re-Select your desired financing company (FCO), Product, Term, and Level

### Quick Tip:

If the sale type of this proposal or order is not set to *Lease* the *Financing Summary* will not be accessible. See [page 89](#) for how to change a deal's sale type.

The screenshot shows the 'Pricing' tab selected in the top navigation bar. Below it, the 'Financing Summary' section is visible. A red box labeled '1' points to the 'Pricing' tab. Another red box labeled '2' points to the '\$Level' dropdown menu, which is currently set to 'Standard'. A third red box labeled '3' points to the 'Company' dropdown menu, which is currently set to 'FCO'. Below the 'Financing Summary' section, there is a 'Proposal Summary' table showing terms and costs.

Proposal Summary			
24mo	36mo	48mo	60mo
\$7662	\$5423	\$4255	\$3663

The *Financing Summary* section of the pricing tab allows you to change the financing company (FCO) that you would like to work with on a leased proposal or order.

To change a deal's financing company:

1. Click on the Pricing tab
2. In the *Financing Summary* Section, select the financing company you would like from the *Company* drop down

**Quick Tip:**

If the sale type of this proposal or order is not set to *Lease* the *Financing Summary* will not be accessible. See [page 89](#) for how to change a deal's sale type.

## How to: Change a Deal's Financing Company

**1**

**2**

**Financing Summary**

SLevel: Preferred

Company: US\_Bank

Product: FCO

Term: Meridian

Level: US\_Bank

Factor:

Financed\$:

Eq Pymt\$: \$5,426.10

Soft Cost\$: \$0.00

Soft Cost%: 0.00%

**Proposal Summary**

24mo	36mo	48mo	60mo
\$7967	\$5426	\$4234	\$3529

The *Financing Summary* section of the pricing tab allows you to change the leasing product you would like to employ on a leased proposal or order.

To change a deal's lease product:

1. Click on the Pricing tab
2. In the *Financing Summary* Section, select the lease product you would like from the *Product* drop down

**Quick Tip:**

If the sale type of this proposal or order is not set to *Lease* the *Financing Summary* will not be accessible. See [page 89](#) for how to change a deal's sale type.

## How to: Change a Deal's Lease Product

The screenshot shows the SalesChain interface with the following elements:

- Navigation Bar:** Contains tabs for General, Products, Service, IT Services, IT Product, and Pricing. The Pricing tab is highlighted with a red box labeled '1'.
- Financing Summary Section:** Contains fields for SLevel (Preferred), Company (GreatAmerica), Product (\$1 OUT), Term (PRODUCT), Level (\$1 OUT-2), Factor (FMV-0 adv, FMV-2 adv), FinancedS, Eq Pymt\$, and Soft Cost\$. The Product dropdown menu is highlighted with a red box labeled '2'.
- Proposal Summary Table:**

Proposal Summary				
24mo	36mo	48mo	60mo	
\$7778	\$5254	\$4140	\$3372	

## How to: Change a Deal's Lease Term

The *Financing Summary* section of the pricing tab allows you to change the deal's lease term on a leased proposal or order.

*Note: the lease term which you select here will be used by the scenario pricing tool when you calculate monthly lease payment, and it will appear on proposals and other generated paperwork.*

To change a proposal or order's lease term:

1. Click on the Pricing tab
2. In the *Financing Summary* Section, select the lease term you would like from the *Term* drop down

### Quick Tips:

- If you're using the wizard tab to generate proposals and your lease term is **not** a perfect multiple of 12 (39 months for example), the selected lease term will always show up on the proposal.
- If the sale type of this proposal or order is not set to *Lease* the *Financing Summary* will not be accessible. See page 89 for how to change a deal's sale type.

The screenshot shows the SalesChain interface with the Pricing tab selected. The Financing Summary section is visible, showing fields for SLevel, Company, Product, Term, Level, Factor, Financed\$, Eq Pymt\$, and Soft Cost\$. The Term dropdown menu is open, showing options: 12, 24, 36, 39, 48, 60, and 63. A red box labeled '1' highlights the Pricing tab, and another red box labeled '2' highlights the Term dropdown menu.

Proposal Summary			
24mo	36mo	48mo	60mo
\$7778	\$5254	\$4140	\$3372

The *Financing Summary* section of the pricing tab allows you to view different lease levels.

*Important: This will override in the backend, so changing the lease level here will not have any effect. Simply select the leasing company and product and the appropriate level will be assigned to the deal.*

1

2

**Financing Summary**

SLevel: Preferred

Company: GreatAmerica

Product: \$1 OUT

Term: 36

Level: 100,000 - 3,999,999

Factor: FACTOR

FinancedS: 1,000 - 2,999

Eq PymtS: 3,000 - 14,999

Soft CostS: 15,000 - 24,999

24mo

\$7778	\$5254	\$4140	\$3372
--------	--------	--------	--------

## Quick Tip:

If the sale type of this proposal or order is not set to *Lease* the *Financing Summary* will not be accessible. See [page 89](#) for how to change a deal's sale type.

The *Financing Summary* section of the pricing tab allows you to override the lease rate factor and enter a custom one on a leased proposal or order.

To change a proposal or order's lease rate factor:

1. Click on the Pricing tab
2. In the *Financing Summary* Section, check the box next to *Override Factor*. The *factor* text box will turn yellow and become editable
3. Enter your desired factor in the *Factor* box and hit *Enter* on your keyboard
4. Enter your desired lease term in the *Term* drop-down

**Quick Tip:**

If the sale type of this proposal or order is not set to *Lease* the *Financing Summary* will not be accessible. See [page 89](#) for how to change a deal's sale type.

## How to: Override a Deal's Lease Rate Factor

The screenshot shows the 'Pricing' tab selected in the top navigation bar. The 'Financing Summary' section is visible, containing fields for SLevel, Company, Product, Term, Level, and Factor. A red box labeled '1' points to the 'Pricing' tab. A red box labeled '2' points to the 'Override Factor' checkbox. A red box labeled '3' points to the 'Factor' text box, which is highlighted in yellow. A red box labeled '4' points to the 'Term' dropdown menu.

**Financing Summary**

SLevel: Preferred  
 Company: GreatAmerica  
 Product: \$1 OUT  
 Term: 36  
 Level: 100,000 - 3,999,999  
 Factor: 0.0335  
☒ Override Factor

Financed\$: \$156,823.84  
 %MSRP: 83.60%  
 Eq Pymt\$: \$5,253.60  
 Soft Cost\$: \$0.00  
 Soft Cost%: 0.00%

**Proposal Summary:**

24mo	36mo	48mo	60mo
\$7778	\$5254	\$4140	\$3372

☒ Override Factor

Factor: 0.0335  
 Term: 36

Financed\$: \$156,823.84  
 %MSRP: 83.60%  
 Eq Pymt\$: \$5,253.60  
 Soft Cost\$: \$0.00  
 Soft Cost%: 0.00%

**Proposal Summary:**

24mo	36mo	48mo	60mo
\$7778	\$5254	\$4140	\$3372

## How to: Set a Deal's Service Billing Intervals

The *Service Summary* section of the pricing tab allows you to change how frequently your customer will be billed for service and for overages.

To change a deal's service billing interval:

1. Click on the Pricing tab
2. a) Select your desired billing interval from the *Base Bill* drop-down. (Pending a change in system configuration, this will default to *Monthly*). b) Select your desired overage billing interval from the *Overage Bill* drop-down.

**1**

General Products Service IT Services IT Product **Pricing**

**2a**

**Service Summary**

Contract Type: Volume Commitment

Base Bill: Monthly

Term: Billing Cycle

Base Mo Pymt\$: Annual

Total Value\$: In Lease

Overage Bill: Monthly

Fixed Amt\$: Pass Thru

Start Date: Quarterly

IT S

**2b**

Same as Base

Annual

Contract Type: In Lease

Base Bill: Monthly

Term: Pass Thru

Base Mo Pymt\$: Quarterly

Total Value\$: Semi-Annual

Overage Bill: Same as Base

Fixed Amt\$: \$0.00

Start Date:

**Service Summary**

Contract Type: Volume Commitment

Base Bill: Monthly

Term: 36

Base Mo Pymt\$: \$733.48

Total Value\$: \$26,405.28

Overage Bill: Quarterly

Fixed Amt\$: \$0.00

Start Date:

**Quick Tip:**

If you are pricing cost per copy (CPC) service, all service payments are considered overages

The *IT Services Summary* section of the pricing tab allows you to change how frequently your customer will be billed for IT Services.

To change a deal's IT service billing interval:

1. Click on the Pricing tab
2. Select your desired billing interval from the *Billing* drop-down. (Pending a change in system configuration, this will default to *Monthly*)

## How to: Set a Deal's IT Service Billing Interval

1

General Products Service IT Services IT Product **Pricing**

2

**IT Services Summary**

**Billing:** Monthly

**Monthly\$:** Billing Cycle

**Annual\$:** Annual

**Term:** In Lease

**IT Prod** Monthly

**Pymt Terms:** Sel Pass Thru

**Total:** Quarterly

Semi-Annual

**IT Services Summary**

**Billing:** Monthly

**Monthly\$:** \$185.52

**Annual\$:** \$2,226.24

**Term:** 36

## Cost/Profit Summary

The *Cost Profit Summary* section of the pricing tab displays a summary of the proposal or order that you are pricing.

Cost/Profit Summary	
<b>Total Buy\$:</b>	\$92,543.60
<b>MFG Credit\$:</b>	\$0.00
<b>Adj Buy\$:</b>	\$92,543.60
<b>Total Sell\$:</b>	\$156,773.84
<b>Base GPS:</b>	\$64,230.24
	40.97%
<b>Adjusted GPS:</b>	\$64,230.24
	40.97%
<b>Total MSRPS:</b>	\$187,590.00

Tab Fields	Description
Total Buy\$	Represents the total cost to rep before any credits.
MFG Credit\$	Represents the credits associated with the equipment.
Adj Buy\$	Total Buy\$ minus Total MFG Credit\$
Total Sell\$	Total retail price
Base GP\$	Base gross profit on the deal.
Adjusted GP\$	Gross profit on the deal after adjustments.
Total MSRP\$	Total manufacturer suggested retail price.

The *Scenario Pricing Tool* in the pricing tab allows you to target certain values to make a deal work for you or present your customer with nice round values. You may target lease payments, gross profit percentages and more.

To use the *Scenario Pricing* tool:

1. Click on the Pricing tab
2. (Optional) Check boxes to *Lock Accessory Pricing*, *No Charge Accessories*, or to price *Supplies at Cost*.
3. Choose the scenario you would like to target from the *Scenario* drop-down (In this example, lease payment dollar value).
4. Enter your target value
5. Click the *Calculate Scenario* button

**Quick Tip:**

If you are targeting a lease payment, the scenario pricing tool will use the lease term and rate factor that is selected in the *Financing Summary*. See page 121 for instructions on changing the lease term.

## How To: Use the Scenario Pricing Tool

The screenshot shows the 'Pricing' tab selected in the top navigation bar. The 'Scenario Pricing' section contains three checkboxes: 'Lock Accessory Pricing', 'No Charge Accessories', and 'Supplies at Cost'. Below these is a 'Scenario' drop-down menu with a list of options including 'SCENARIO', 'Adj-Gross Profit%', 'Adj-Gross Profit\$', 'Amt Financed\$', 'Gross Profit%', 'Gross Profit\$', 'Lease Payment\$', 'Markup%', 'Sell Price\$', 'Sell MSRP Discount%', and 'Select Sell MSRP Discount%'. The 'Target' field is set to '5000'. A 'Calculate Scenario' button is located at the bottom right of the pricing section. Below the pricing section is a 'Proposal Summary' table with columns for lease terms: 24mo, 36mo, 48mo, and 60mo. The values for each term are \$7403, \$5000, \$3940, and \$3209 respectively. The 36mo term is highlighted with a red box.

Proposal Summary			
24mo	36mo	48mo	60mo
\$7403	\$5000	\$3940	\$3209

The section of the pricing tab on the far right with green and red fields includes all the fees and soft costs that may be associated with the order.

*Note: This section is highly customizable. Fields that are shown here may vary depending on your configuration.*

**Key:**

1. a) Anything in red above the Amount Financed indicates a cost to the customer. Anything in green above Amount Financed is a credit to the customer. b) Anything in green below Amount Financed is a credit to the margin of the deal. Anything below Amount Financed is a debit to the margin of the deal.
2. Costs and fees are associated with these three categories: (b) – board credit (f) – financed (t) – taxable
3. Some fields are editable here while others are meant only for summary display. For example, the connectivity fee is set in the *Adjustments* subtab (See Page 114) and the total is displayed here, while the lease buyout value is actually entered here.

## Proposal and Order Pricing: Soft Costs and Margin Adjustments

<b>SUBTOTAL:</b>	\$31,815.11
Lease Buyout(t)(f):	\$638.50
<input type="checkbox"/> Competitive Lease Buyout (t)(f):	\$0.00
Lease Return Fee(t)(f):	\$0.00
ITT Fee(t)(f):	\$0.00
<input type="checkbox"/> Misc Fee (t)(f):	\$0.00
<input type="checkbox"/> Misc Credit (t)(f):	\$0.00
Freight(t)(f):	\$407.69
Connectivity(t)(f):	\$676.00
<b>Amount Financed:</b>	\$33,537.30
<input type="checkbox"/> Misc Rep Credit (b):	\$0.00
<input type="checkbox"/> Misc Rep Cost (b):	\$0.00
<input type="checkbox"/> Freight To Board Credit (b):	\$0.00
Connectivity To Board Credit(b):	\$0.00
Board Credit:	\$31,815.11
Sales Tax:	\$0.00
<b>GRAND TOTAL:</b>	\$33,537.30

**Note:**

## Proposal and Order Pricing: Billing Tab

The Billing Tab provides the given account's bill-to address and billing contact. This information will appear on all proposal and order pricing paperwork that is generated.

### Key:

- 1) Select Billing Address from Parent/Child account list
- 2) Select or create a contact at this account who will receive bills. (Leave blank to generate bills with only a business name)
- 3) Address entry dialogue

**Customer:** 5503 Lakeside Ave

**Contact:** New/Edit

**Customer Information:**

- Name: 5503 Lakeside Llc
- Customer#:
- Address: 5503 Lakeside Ave
- City: Henrico
- State: VA
- Zip: 23228
- Cust Type: - Select -
- Fed ID#:

**Contact Information:**

- Email:
- Phone:
- Cell:
- Fax:
- Dear:

## How To: Change a Proposal or Order's Billing Address

The Billing tab allows you to enter any given deal's billing address.

To change a deal's billing address:

- 1) Click on the *Billing* tab
- 2) Select the address you would like to send bills to using the Customer drop-down or select New entry and enter a new address
- 3) **IF** you have entered a new address, click the red Save button at the top right

The screenshot shows the 'Billing' tab selected in a navigation bar. Below the navigation bar, there is a form for entering billing information. The form includes a 'Customer' dropdown menu, a 'Name' field, a 'Customer#' field, an 'Address' field, and a 'City' field. A red box highlights the 'Customer' dropdown menu, which is currently set to '5503 Lakeside Ave'. Below the dropdown, the 'Name' field is set to 'New Entry', the 'Customer#' field is set to '5503 Lakeside Ave', the 'Address' field is set to '5503 Lakeside Ave', and the 'City' field is set to 'Henrico'. A red box highlights the 'Save' button in the bottom right corner of the form.

**Quick Tip:**

If you enter a new address, a new account will be created.

## How To: Select or Change a Proposal or Order's Billing Contact

The Billing tab allows you to enter any given deal's billing contact.

To change the billing contact for any given deal:

- 1) Click on the *Billing* tab
- 2) Click the *New/Edit* button
- 3) Select the contact you would like to send bills to using the drop-down. If the desired contact does not exist, select *\*New Entry* and enter contact details.
- 4) Click *Save*

### Quick Tip:

If you enter a new contact, a new contact will be created and associated with the existing account in SalesChain.

The screenshot shows the SalesChain interface with the following elements highlighted by numbered callouts:

- 1**: Points to the **Billing** tab in the top navigation bar, which is currently selected.
- 2**: Points to the **New/Edit** button located next to the **Contact:** label in the Billing section.
- 3**: Points to the contact selection dropdown menu in the **Edit Contact** dialog box. The dropdown shows *\*New Entry* as the selected option, with other visible options being *\*New Entry* and *Clarke, Donn*.
- 4**: Points to the **Save** button at the bottom right of the **Edit Contact** dialog box.

The **Edit Contact** dialog box also includes input fields for Email, Phone, Cell, Fax, and a Company dropdown menu showing *5503 Lakeside Ave*.

## Proposal and Order Pricing: Finance Tab

The Finance tab provides configurable information regarding a deal's lease. You may process lease upgrades, submit credit applications and change detailed billing information.

**Key:**

- 1) Lease Upgrade Lookup
- 2) Credit Application Summary & Submit Button
- 3) Billing Information Entry
- 4) Display of linked leases to be upgraded
- 5) Lease Buyout Value (Pulled from Pricing Tab - [See page 128](#))
- 6) Lease upgrade type selection
- 7) Attach a document

The screenshot displays the Finance tab interface with the following components highlighted by red boxes and numbers:

- 1**: Points to the "Upgrade" section header.
- 2**: Points to the "Credit App Summary" section.
- 3**: Points to the "Billing Info" section.
- 4**: Points to the "Lease Nbr:" field in the Upgrade section.
- 5**: Points to the "Buyout\$:" field in the Upgrade section.
- 6**: Points to the "Type:" dropdown menu in the Upgrade section.
- 7**: Points to the "Attachments" button in the Upgrade section.

The interface includes a top navigation bar with tabs: General, Products, Service, IT Services, IT Product, Pricing, Bid Desk, Billing, **Finance**, Delivery, Commissions, Wizard, and Documents.

The **Upgrade** section contains:

- FCO: FCO (dropdown) and Lookup button
- Lease Nbr: (text field)
- Buyout\$: \$0.00 (text field)
- Type: Upgrade Types (dropdown)
- Attachments (button)

The **Credit App Summary** section contains:

- Lease Legal Name: (text field)
- Credit App#: (text field)
- Submitted On: (text field)
- Approved On: (text field)
- Valid Thru: (text field)
- Condition: (text area)
- Buy Rate: 0 (text field)
- Amount Funded: \$0.00 (text field)
- Lease Income: \$0.00 (text field)
- Submit Application(s) (button)

The **Billing Info** section contains:

- Commence DT: (text field)
- First Pymt Due: (text field)
- Security Deposit: \$0.00 (text field)
- DCA: ☐
- Master Agreement#: (text field)
- Schedule#: (text field)
- ACH: ☐
- ACH Bank Route#: (text field)
- ACH Bank Acct#: (text field)
- Tax Exempt: ☐

It is possible to attach a document to an order via the Finance tab.

To attach a document to an order:

1. Navigate to the Finance tab
2. Click on *Attachments* under the upgrade section
3. Click on *New Attachment*
4. Fill out the form and choose an attachment from your computer
5. Click Save

## How To: Attach a Document to an Order

The screenshot illustrates the process of attaching a document to an order in the SalesChain system. The interface shows the Finance tab selected, and the Attachments section is visible. The 'New Attachment' button is clicked, leading to the 'Attach A Document' form. The form fields are filled out, and the 'Save' button is clicked.

1. Navigate to the Finance tab

2. Click on *Attachments* under the upgrade section

3. Click on *New Attachment*

4. Fill out the form and choose an attachment from your computer

5. Click Save

When you are pricing a deal for an existing customer, it is possible to associate this new deal with an existing lease as an upgrade.

To perform a lease lookup:

1. Navigate to the Finance tab
2. Click *Lookup*
3. Choose the appropriate existing lease(s) using the check box(es).
4. Click *Save*

## How To: Lookup a Lease for Upgrade

The screenshot illustrates the process of looking up a lease for an upgrade. It shows the 'Finance' tab selected in the top navigation bar. Below it, the 'Upgrade' section has 'FCO' set to 'FCO' and a 'Lookup' button. A 'Lease Nbr:' field is also present. The 'Lease lookup' window is open, displaying a table of existing leases. The first two rows are selected with checkboxes. The 'Save' button at the bottom right of the window is highlighted.

	FCO	Lease#	Payment	Term	Customer#	Customer Name	Address	Phone	Begin	End	Serials
<input checked="" type="checkbox"/>	CIT	900-0097790-000	\$138.35	36	Southern	Southern Management Corp	1950 Old Gallows Rd Ste 600 Vienna, VA 22182	(703) 902-2000	11/3/2007	11/20/2010	K8366740294, K8366740294
<input checked="" type="checkbox"/>	CIT	900-0097815-000	\$973.77	36	Southern	Southern Management Corp	1950 Old Gallows Rd Ste 600 Vienna, VA 22182	(703) 902-2000	11/3/2007	11/20/2010	K9365702394, K9365702413, K
<input type="checkbox"/>	CIT	900-0098525-000	\$249.51	36	Southern	Southern Management Corp	1950 Old Gallows Rd Ste 600 Vienna, VA 22182	(703) 902-2000	11/16/2020	11/20/2023	26619476, 27166766XST
<input type="checkbox"/>	CIT	900-0100121-000	\$951.51	36	Southern	Southern Management Corp	1950 Old Gallows Rd Ste 600 Vienna, VA 22182	(703) 902-2000	12/14/2007	12/20/2010	65LE03473
<input type="checkbox"/>	CIT	900-0102182-000	\$218.90	36	Southern	Southern Management Corp	1950 Old Gallows Rd Ste 600 Vienna, VA 22182	(703) 902-2000	1/17/2008	1/20/2011	M0966000439
<input type="checkbox"/>	CIT	900-0102183-000	\$328.84	36	Southern	Southern Management Corp	1950 Old Gallows Rd Ste 600 Vienna, VA 22182	(703) 902-2000	1/17/2008	1/20/2011	K9365901496
<input type="checkbox"/>	CIT	900-0102184-000	\$295.18	36	Southern	Southern Management Corp	1950 Old Gallows Rd Ste 600 Vienna, VA 22182	(703) 902-2000	1/17/2008	1/20/2011	M1065900201
<input type="checkbox"/>	CIT	900-0102185-000	\$149.19	36	Southern	Southern Management Corp	1950 Old Gallows Rd Ste 600 Vienna, VA 22182	(703) 902-2000	1/17/2008	1/20/2011	K8366741655

The 'Upgrade' section shows 'FCO' set to 'MULTIPLE' and the 'Lookup' button. The 'Lease Nbr:' field is populated with the selected lease numbers: '900-0097790-000, 900-0097815-000'.

## How To: Submit a Credit Application

When you are finished pricing a deal and have filled out the financing summary information in the *Pricing* tab (See page 112) it is possible to submit your credit application directly from the Order Breakdown.

*Note: This is a permissioned action, and only leasing coordinators are typically allowed to perform this action.*

To submit a credit app summary:

1. Navigate to the Finance tab
2. Fill out the blanks in the Credit App Summary box
3. Click *Submit Application(s)*

1

IT Product Pricing Bid Desk Billing **Finance** De

2

**Credit App Summary**

Lease Legal Name:

Credit App#:

Submitted On:

Approved On:

Valid Thru:

Condition:

Buy Rate:

Amount Funded:

Lease Income:

**Submit Application(s)**

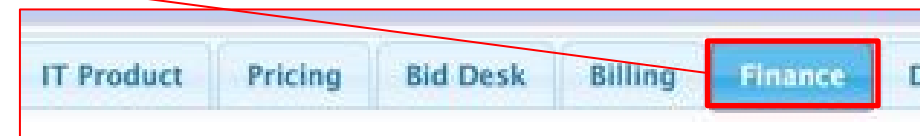
3

It is possible to add billing information for a customer account in any given order within the *Finance* tab.

To complete the billing information on an order:

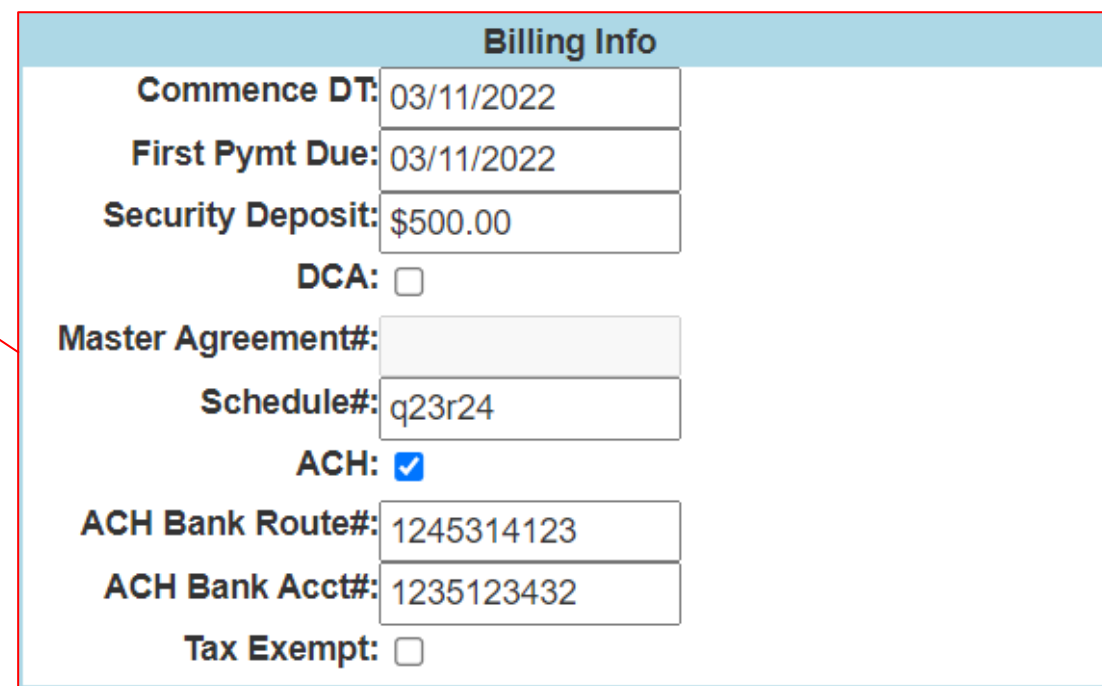
1. Navigate to the Finance tab
2. Fill out the blanks in the *Billing Info* box
3. Click the flashing red Save button

1



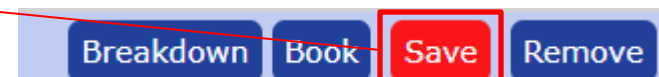
IT Product Pricing Bid Desk Billing **Finance** De

2



Billing Info	
Commence DT:	03/11/2022
First Pymt Due:	03/11/2022
Security Deposit:	\$500.00
DCA:	<input type="checkbox"/>
Master Agreement#:	
Schedule#:	q23r24
ACH:	<input checked="" type="checkbox"/>
ACH Bank Route#:	1245314123
ACH Bank Acct#:	1235123432
Tax Exempt:	<input type="checkbox"/>

3



Breakdown Book **Save** Remove

## Proposal and Order Pricing: Delivery Tab

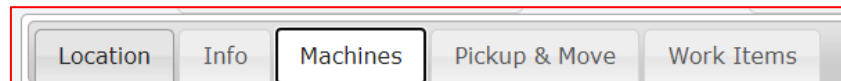
The *Delivery* tab contains the location, pickup and allocation information used to fulfill an order. There are several Subtabs used to organize and enter delivery information. The purposes and page numbers of each of these subtabs are listed in the table below.

Key:	
1)	Delivery job selection drop-down
2)	Total number of delivery jobs display
3)	Delivery job status drop-down
4)	Delivery job type drop-down
5)	Coordinator selection drop-down
6)	Add or remove delivery jobs
7)	Subtab Selection
8)	Information displayed in each subtab – in this case the <i>Location</i> subtab (See <a href="#">Page 139</a> )

The screenshot shows the 'Delivery' tab in the SalesChain application. The interface includes a top navigation bar with tabs: General, Products, Service, IT Services, IT Product, Pricing, Bid Desk, Billing, Finance, Delivery (selected), Commissions, Wizard, and Documents. Below the navigation bar is a summary section with fields: Delivery Job: 2 - Second Location, Total #: 2, Status: Pending, Type: Copier, Coordinator: SELECT, and buttons Add and Remove. Below this is a subtab selection bar with options: Location (selected), Info, Machines, Pickup & Move, and Work Items. The main content area is divided into two columns. The left column contains fields for DJ Location Name (Second Location), SHIP-TO (5503 Lakeside Ave), Company (5503 Lakeside Llc), Cust #, Address (5503 Lakeside Ave), City (Henrico), State (VA), and Zip (23228). The right column contains contact information for Primary Contact, IT Contact, and Meter Contact, all listed as Doe, John, with email, phone, and fax fields. Each contact section has a 'New/Edit' button. Red callout boxes with numbers 1 through 8 point to specific elements: 1 points to the Delivery Job dropdown, 2 points to the Total # display, 3 points to the Status dropdown, 4 points to the Type dropdown, 5 points to the Coordinator dropdown, 6 points to the Add/Remove buttons, 7 points to the subtab bar, and 8 points to the main information area.

## Delivery Tab Vocabulary

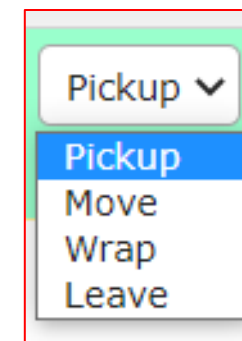
There are five subtabs within the delivery tab which allow you to view and edit delivery information. They are outlined in the table below.



Delivery Tab Subtabs		
Subtab	Page Number	Description
Location	<a href="#">139</a>	Enter address and contact information for each delivery job
Info	<a href="#">142</a>	Enter details about each delivery location and request delivery dates
Machines	<a href="#">144</a>	Allocate assets to each location to make sure they're headed to the right place in multi-location orders
Pickup & Move	<a href="#">145</a>	Enter information for assets to be picked up, designate which machines on this order will replace them, and more
Work Items	<a href="#">147</a>	Check boxes in this tab to keep track of progress as this order is fulfilled

There are three types of delivery jobs which you can choose from within the *Delivery* tab to give instructions to your delivery team. [See page 140](#) for how to add delivery jobs to an order. They are outlined in the table below:

Delivery Job Types	
Tab Fields	Description
Pickup	The delivery team is instructed to pickup an existing asset (whether it be yours, customer owned, or a competitors) and replace it with an asset priced on this order
Move	The delivery team is instructed to move an existing asset from one location to another (like between customer offices, buildings or back to your warehouse) without leaving an asset priced on this deal there. This job can also be used to generate move paperwork for relocation-only jobs.
Wrap	The delivery team is instructed to shrink wrap an asset for pickup by someone else.
Leave	The delivery team is instructed to leave a new asset where there has not been one before



## Proposal and Order Pricing: Delivery Tab - Location Subtab

The *Location* subtab allows you to confirm or enter address information for one or more locations on this order and change the contacts at said location(s).

### Key:

- 1) Delivery job nickname entry
- 2) Address selection/lookup drop-down
- 3) Enter or view address details
- 4) Contact selection/lookup for *Primary*, *IT*, and *Meter* contacts at this location.

The screenshot shows the 'Location' subtab interface. It features a tabbed menu at the top with 'Location', 'Info', 'Machines', 'Pickup & Move', and 'Work Items'. The 'Location' tab is active. The interface is divided into two main sections. The left section contains address and company information, while the right section contains contact information. Red boxes and numbers 1 through 4 are used to highlight specific features: 1 points to the 'DJ Location Name' field, 2 points to the 'SHIP-TO' dropdown, 3 points to the address details form, and 4 points to the contact information section.

**Location Subtab Interface:**

- Tabbed Menu:** Location, Info, Machines, Pickup & Move, Work Items
- Left Section (Address/Company Details):**
  - 1 DJ Location Name:** Second Location
  - 2 SHIP-TO:** 5503 Lakeside Ave (dropdown)
  - 3 Address Details:**
    - Company: 5503 Lakeside Llc
    - Cust #: [Field]
    - Address: 5503 Lakeside Ave
    - [Field]
    - City: Henrico
    - State: VA (dropdown)
    - Zip: 23228
- Right Section (Contact Information):**
  - Primary Contact:** Doe, John (New/Edit button)  
Email: JohnDoe@lakeside.com  
Phone: (123)456-7890 Cell: [Field]  
Fax: [Field]
  - IT Contact:** Doe, John (New/Edit button)  
Email: JohnDoe@lakeside.com  
Phone: (123)456-7890 Cell: [Field]  
Fax: [Field]
  - Meter Contact:** Doe, John (New/Edit button)  
Email: JohnDoe@lakeside.com  
Phone: (123)456-7890 Cell: [Field]  
Fax: [Field]

## How To: Add Additional Delivery Jobs to an Order

An order can have multiple delivery jobs if different equipment is to be delivered to different locations, or when a partial delivery is required. If all assets on an order are going to the bill-to location, you **don't** need multiple delivery jobs.

[View a Tutorial Video](#)

To add a new delivery location:

1. Navigate to the *Delivery* tab
2. Navigate to the *Location* subtab
3. Click the *Add* button
4. Select a location from the *Ship-To* dropdown menu. To add a new address, select *\*New Entry* and add address and contact information as needed.

\*\* Repeat steps 3-4 as needed \*\*

The screenshot shows the SalesChain software interface. The top navigation bar includes tabs: General, Products, Service, IT Services, IT Product, Pricing, Bid Desk, Billing, Finance, **Delivery** (highlighted with a red box and number 1), Commissions, Wizard, and Documents. Below the navigation bar, the Delivery Job details are shown: Delivery Job: 1 - 5503 Lakeside Ave, Total #: 1, Status: Pending, Type: Copier, Coordinator: SELECT. The Location subtab (highlighted with a red box and number 2) is active. The Location subtab has a subtab bar with Location (highlighted with a red box and number 2), Info, Machines, Pickup & Move, and Work Items. The Location subtab contains a form for adding a new location. The form has a subtab bar with DJ Location Name, SHIP-TO (highlighted with a red box and number 4), and a magnifying glass icon. The SHIP-TO dropdown menu is open, showing the option \*Same As Billing (highlighted with a red box and number 3). The form also includes fields for Company, Cust #, Address, City, State, and Zip. On the right side of the form, there are contact details for Primary Contact, IT Contact, and Meter Contact, each with a New/Edit button.

### Quick Tips:

- The list of ship-to addresses represents this account and other accounts associated to it.
- The first location (Delivery job #1) will default to the bill-to address "Same As Billing"
- If you create a new entry while adding a new ship-to location, a new account will be created in the system and associated to the original.

## How To: Remove Delivery Jobs From an Order

It is possible to remove delivery jobs that have been added to a proposal or order.

*Note: Machines allocated to this delivery job will no longer be assigned to ANY delivery job. If you delete a job with machines allocated to it, be sure to re-allocate those machines to a different delivery job.*

[View a Tutorial Video](#)

To remove a delivery job:

1. Navigate to the Delivery tab
2. Select the desired address from the *Delivery Job* drop-down
3. Click *Remove*
4. Click *Ok* in the pop-up window

\*\* Repeat steps 2-4 as needed \*\*

The screenshot shows the SalesChain interface with the 'Delivery' tab selected. The 'Delivery Job' dropdown is set to '2 - 5503 Lakeside Ave'. The 'Remove' button is highlighted. The interface also shows fields for 'SHIP-TO', 'Company', 'Cust #', 'Address', 'City', 'State', and 'Zip', as well as contact information for 'Primary Contact', 'IT Contact', and 'Meter Contact'.

The dialog box contains the following text: "www.mysaleschain.com says Removing this job will cause any equipment allocated to this job to no longer be assigned to any delivery job. Are you sure you want to continue?". The 'OK' button is highlighted.

## Proposal & Order Pricing: Delivery Tab - Info Subtab

The *Info* subtab allows you to enter delivery details for each location including information about accessibility and supplies. It also allows you to request a delivery date and specific driver and gives you the ability to designate a delivery contact.

*Important: Each delivery job will have its own info tab. This information must be completed for each delivery job independently.*

### Key:

- 1) Request a delivery date
- 2) Schedule a delivery date (permission pending)
- 3) Select a delivery truck or driver
- 4) Enter a sales order number (if applicable)
- 5) Enter accessibility information for this location
- 6) Designate whether this delivery comes with toner or not *Note: drop-downs here may vary by system configuration*
- 7) View/change/edit delivery contact information
- 8) Delivery job history (Displays changes made during the fulfillment process)

The screenshot shows the 'Info' subtab of the 'Delivery' section. The interface includes several tabs: Location, Info, Machines, Pickup & Move, and Work Items. The 'Info' tab is active. The form contains the following fields and sections:

- Requested Delivery Date:** 2/18/2022, Afternoon, 1:00pm, 5:00pm (Callout 1)
- Scheduled Delivery Date:** [Empty], TIME, BEGIN, END (Callout 2)
- Delivery Truck:** Martin (Callout 3)
- Sales Order #:** [Empty] (Callout 4)
- Accessibility Options:**
  - ☒ Stairs 12 ☐ Elevator
  - ☐ Freight Elevator Available ☐ Passenger Elevator Available
  - ☒ Receiving Dock Available ☐ Electric Checked
  - ☐ IT Project Requires Installation ☐ IT Equipment Only
- Delivery Method:** [Empty] (Callout 5)
- Toner:** YES (Callout 6)
- Delivery Contact:** Doe, John (New/Edit button)
  - Email: JohnDoe@lakeside.com
  - Phone: (123)456-7890
  - Cell: [Empty]
  - Fax: [Empty]
- History Table:** (Callout 8)
 

USER	DATE	CHANGE
Corbit, G	01/29/22 7:31AM	Delivery Truck changed to Martin

## How To: Request and Schedule a Delivery Date

It is possible for sales reps beginning the fulfillment process to request a delivery date and time window for an order.

*Note: This sends a message to the fulfillment or management staff to request this date and time while not actually locking the delivery staff into a committed date and time window.*

[View a Tutorial Video](#)

To request a delivery date:

1. Navigate to the *Delivery* tab
2. Navigate to the *Info* subtab
3. Click into the *Requested Delivery Date* text box to pop open a calendar which will allow you to select a date **OR** simply
4. Optional: Use the *TIME*, *BEGIN*, and *END* drop-downs to designate a time window on the desired date.

\*\* Repeat steps 2-4 for each delivery job\*\*

The screenshot shows the SalesChain interface with the following elements highlighted by red boxes and numbers:

- 1**: The **Delivery** tab in the top navigation bar.
- 2**: The **Info** subtab in the left sidebar.
- 3**: The **Requested Delivery Date** text box, which has a calendar pop-up showing February 2022. The date 2/18/2022 is selected.
- 4**: The **TIME**, **BEGIN**, and **END** drop-downs. The **TIME** dropdown is open, showing options: Morning, Afternoon, and Range. The **BEGIN** and **END** dropdowns are also visible.

Other visible fields include: Location, Machines, Pickup & Move, Work Items, Scheduled Delivery Date, Delivery Truck, Sales Order #, Stairs (checked), Freight Elevator Available, and Delivery Method.

If assets are going to different locations, you need to allocate the equipment to each location. However, if all assets are all going to a single location, you **don't** need to allocate equipment.

[View a Tutorial Video](#)

To allocate assets to delivery jobs:

1. Navigate to the Delivery Tab
2. Navigate to the *Machines* subtab
3. Click *Allocate*
4. Select the desired location from the *Assign to Location* dropdown menu
5. In the *Allocate Machines* dialogue, select the equipment you would like to allocate to this job using the check boxes
6. Click *Allocate*

**Quick Tip:**

By default, assets are always allocated to location #1 (the default delivery job). You're always allocating machines away from this location to begin with.

## How to: Allocate Assets to Delivery Jobs

The screenshot illustrates the steps to allocate assets to delivery jobs within the SalesChain software interface.

**Step 1:** The **Delivery** tab is selected in the top navigation bar.

**Step 2:** The **Machines** subtab is selected under the Delivery section.

**Step 3:** The **Allocate** button is clicked.

**Step 4:** The **Assign to Location** dropdown menu is set to **2 - Second Location**.

**Step 5:** In the **Allocate Machines** dialog, the following equipment is selected for allocation:

	B#	M#	Model
1 - Main office			
<input type="checkbox"/>	1-1		imagePRESS C910 Series Main Engine Set
<input checked="" type="checkbox"/>	2-1		imagePRESS C910 Series Main Engine Set
<input type="checkbox"/>	3-1		imageCLASS LBP351dn
<input checked="" type="checkbox"/>	3-2		imageCLASS LBP351dn
<input type="checkbox"/>	4-1		imageRUNNER ADVANCE C756Si III

**Step 6:** The **Allocate** button is clicked in the **Allocate Machines** dialog.

## How To: Add Pickup and Move Instructions to a Delivery Job

For every asset priced on this deal, you will need to add a pickup, move, or leave instruction within the delivery tab in order to generate accurate delivery paperwork.

[View a Tutorial Video](#)

To add pickup/move/leave instructions to a delivery job:

1. Navigate to the *Delivery* tab
2. Navigate to the *Pickup & Move* subtab
3. Click *Add*
4. Fill in the form with the details of this delivery job including a) the type of job this is b) details of any existing assets involved in this job c) (optional) text instructions for the delivery team d) the machine priced on this order which will replace the existing equipment
5. Click *Save*

The screenshot shows the SalesChain interface with the following elements highlighted:

- 1**: The **Delivery** tab in the top navigation bar.
- 2**: The **Pickup & Move** subtab in the left sidebar.
- 3**: The **Add** button in the subtab header.
- 4a**: The **Save** button in the top left of the form.
- 4b**: The **Type** dropdown menu.
- 4c**: The **Instructions** text area.
- 4d**: The **Machine** dropdown menu.
- 5**: The **Save** button in the bottom left of the form.

The form contains a table with the following data:

Type	Model	Serial	Eq ID	HDC	BC	DO	LsR	Lease#	Lease Co	Exp Date	Instructions	Machine	Complete	Completed On
Pickup	c5790	6716501983	153153	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	sc1001	GA	01/28/2022	Pick up old machine and bring to warehouse for resale	1-1 imagePRESS C910 Series	<input type="checkbox"/>	

Below the table is an **Add** button and a **Search** button.

### Quick Tips:

If existing assets are listed at this location, you can click the *Search* button to perform a lookup and automatically bring their information in, rather than typing it manually.

## How To: Edit Pickup and Move Instructions on a Delivery Job

It is possible to edit delivery jobs you have created to make corrections or adjustments.

To edit pickup/move/leave instructions to a delivery job:

1. Navigate to the *Delivery* tab
2. Navigate to the *Pickup & Move* subtab
3. Click on the desired delivery job to select it, it will be highlighted in green
4. Click *Edit*
5. Make the desired changes
6. Click *Save*

### Quick Tip:

To delete a delivery job rather than editing it, click *Remove* rather than *Edit* in step 4.

The screenshot illustrates the steps to edit a delivery job in the SalesChain system. The interface shows a navigation bar with tabs: Billing, Finance, **Delivery**, and Commissions. Below this is a subtab bar with: Location, Info, Machines, **Pickup & Move**, and W. The main area contains a table with columns: Type, Model, Serial, Eq ID, and HDC. A row for 'Pickup' is highlighted in green. Below the table are buttons: Add, **Edit**, Remove, and Search. At the bottom, there is a 'Save' button, a 'Cancel' button, and a 'Search' button. The bottom section shows a detailed table with columns: Type, Model, Serial, Eq ID, HDC, BC, DO, LsR, Lease#, and Lease Co. The 'Pickup' row is highlighted in green.

Type	Model	Serial	Eq ID	HDC
Pickup	c5790	6716501983	153153	<input checked="" type="checkbox"/>

Type	Model	Serial	Eq ID	HDC	BC	DO	LsR	Lease#	Lease Co
Pickup	c5790	6716501983	153153	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	sc1001	GA

## Proposal & Order Pricing: Delivery Tab – Work Items Subtab

You may track delivery work items as you and your team complete them in the *Work Items* subtab.

*Note: Items in this subtab are highly customizable. The work items here may not reflect your system configuration.*

### Key:

- 1) Check the box in this column to mark this work item as required
- 2) The name of the work item is displayed in the *Name* column
- 3) Click on the boxes in the *Assigned To* column and use the drop-down to assign work items to users within the system
- 4) The user to whom this work item is assigned can check the boxes in the *Completed* column to mark them as complete
- 5) The date these work items have been completed is noted in the *Completed On* column
- 6) When you click into a box in the *Completed* column the *Details for Work item* box will appear and allow you to make notes and leave instructions. *Note: be sure to hit Save before clicking away*

The screenshot shows the 'Work Items' subtab interface. It features a table with columns for 'Name', 'Assigned To', 'Completed', and 'Details for Work item'. A red box highlights the 'Check Inv' row, which is selected. A dropdown menu is open for the 'Assigned To' column of the 'Check Inv' row, showing a list of users: Bastin, Tess; Corbit, Gary; Glover, Danny; Houston, Mike; Leslie, Matt; McGraw, Garret. A 'Save' button is visible in the 'Details for Work item' box.

	Name	Assigned To	Completed	Details for Work item
<input checked="" type="checkbox"/>	Sales Order	Select	<input type="checkbox"/>	
<input type="checkbox"/>	Welcome Package	Select	<input type="checkbox"/>	
<input type="checkbox"/>	PO Create	Select	<input type="checkbox"/>	
<input type="checkbox"/>	PO Approved	Select	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Check Inv	Select	<input checked="" type="checkbox"/>	<p>Instructions: Make sure we're able to get this equipment.</p> <p>Notes: If not, I will have to offer alternatives.  </p> <p>Save</p>
<input checked="" type="checkbox"/>	EQ Ordered	Select	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	* Credit Approval	Select	<input type="checkbox"/>	
<input type="checkbox"/>	Pick and Stage	Select	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Schedule Delivery	Select	<input type="checkbox"/>	
<input type="checkbox"/>	Training	Select	<input type="checkbox"/>	
<input type="checkbox"/>	Pick/Move	Select	<input type="checkbox"/>	

## Proposal and Order Pricing: Commissions Tab

Commission details for an order can be adjusted in the *Commissions* tab.

*Important: Sales Commission Rate configuration is set by your company and a Sales Rep can choose from any available configured options. This whole tab can be permissioned to only be editable by certain users depending on your system configuration. Contact your system administrator with any questions about configuration or commission rates.*

**Key:**

- 1) Commission level selection
- 2) Split rep commission dialogue
- 3) Recurring commission status selection
- 4) Commission summary
- 5) Commission tracking
- 6) Internal note entry
- 7) Cost/Profit Summary (Continues below... See quick Note)

Commission Level: D Deal
1

**Commissions Summary (NNC)**

\$Serv Chargeback:	\$0.00
\$Manual Bonus:	\$0.00
\$Segment Bonus:	\$0.00
\$Service Comm:	\$0.00 0.00%
\$Accumulated Adj:	\$0.00

**Tracking**

Paid (Pri): ☐

Paid (Split): ☐

Sales Order:

Invoice#:

Invoice DT:

**Note:**

**Cost/Profit Summary**

Total Buy\$:	\$92,543.60
MFG Credit\$:	\$0.00
Adj Buy\$:	\$92,543.60

2

**Split Rep 1:** Bennet, Tony 5.00% \$1,492.04 0.2

**Split Rep 2:** SELECT 0.00% \$0.00

**Referral Fee:** SELECT \$0.00

**Production Print:** SELECT \$0.00

**IT Rep:** SELECT \$0.00

**Service Tech Referral:** SELECT \$0.00

**Percent of Rep Cost:** SELECT \$0.00

**Percent of Rep Cost:**  \$0.00

**Spiff 2:** SELECT \$0.00

**\$Total Comm:** \$29,840.75

3

**RECURRING COMMISSION**

**Status:** Active

**Sales Rep:** Corbit, Gary

**SRC Revenue:** \$5,000.00

**\* PCT:** 10.00%

**SRev Amt:** \$500.00

**SRC GP:** \$0.00

**\* PCT:** 0.00%

**SGP Amt:** \$0.00

**SManual:** \$0.00

**\$Total RC Amt:** \$500.00

**Begin Year:** 2022

**Month:** January

**#Payments:** 60

**Frequency:** Monthly

**Note:**  
Recurring Commission for Up-sale on Premiere Service Plan

### Quick Tips:

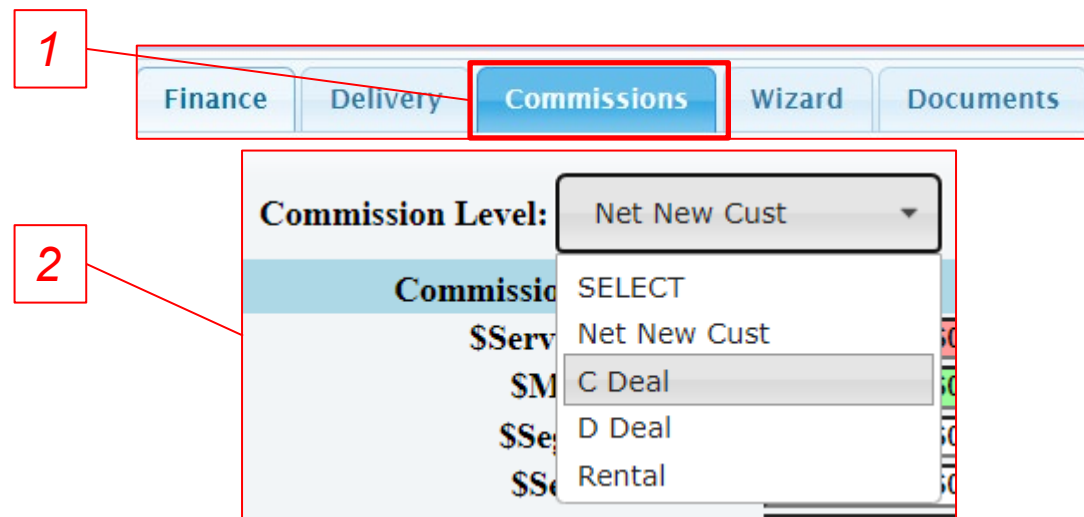
- Commission level and price level may exclude manufacturer credits and segment bonuses from a transaction. Consult your system administrator or sales manager if you have questions.
- Below the information displayed in this screenshot you will see a *Cost Profit Summary*, the same as in the *Pricing* tab. [See page 126](#) for a detailed description.

## How To: Change an Order's Commission Level

It is possible to have many different commission levels configured in the SalesChain system, and to select which is paid out for any order.

To change an order's commission level:

1. Navigate to the *Commissions* tab
2. Choose the desired commission level from the Commissions Level drop-down



### Quick Tip:

Your commissions percentage is represented by a multiple to the right of the Primary Rep Text Box. In the example to the right, the commission rate for the deal is 20%.

Primary Rep:  0.2

## How to: Set Up Split Rep Commissions

It is possible to process split rep commissions on cross sold, complex, or referral deals within the commission tab.

*Important: Split rep commission options are highly customizable, and your system configuration may display different drop-down menus here.*

To set up split rep commissions:

1. Navigate to the *Commissions* tab
2. Select the name of the rep who will receive this portion of commission using the *Split Rep* or other drop downs.
3. Enter a value in the text box to the right of the drop down for the appropriate percentage of commission for this user to receive

The screenshot shows the 'Commissions' tab in the SalesChain system. The interface includes a top navigation bar with tabs for Finance, Delivery, Commissions (highlighted), Wizard, and Documents. Below the navigation bar, the 'Split Rep 1' dropdown is set to 'Bennet, Tony' with a percentage of 5.00%. The 'Split Rep 2' dropdown is set to 'SELECT' with a percentage of 0.00%. Other fields include 'Referral Fee', 'Production Print', 'IT Rep', 'Service Tech Referral', 'Percent of Rep Cost', and 'Spiff 2', all set to 'SELECT' or '0.00%'. The 'Primary Rep' section shows a total of \$28,348.71 with a 0.2% commission. The 'STotal Comm' is calculated as \$29,840.75.

Field	Value	Percentage	Amount
Primary Rep	\$28,348.71	0.2	\$1,492.04
Split Rep 1	Bennet, Tony	5.00%	\$0.00
Split Rep 2	SELECT	0.00%	\$0.00
Referral Fee	SELECT		\$0.00
Production Print	SELECT		\$0.00
IT Rep	SELECT		\$0.00
Service Tech Referral	SELECT		\$0.00
Percent of Rep Cost	SELECT		\$0.00
Percent of Rep Cost	SELECT		\$0.00
Spiff 2	SELECT		\$0.00
STotal Comm			\$29,840.75

## How To: Set Up Recurring Commissions For An Order

It is possible to process recurring commissions for any order.

To activate recurring commissions:

1. Navigate to the Commissions tab
2. Select *Active* from the *Status* drop-down button *Note: the dialogue will expand to reveal more information*
3. Select the sales rep who is to receive recurring commission from the *Sales Rep* drop-down
4. Enter the revenue information for this recurring commission
5. Select a frequency and start date for this recurring commission payout

### Quick Tips:

- *Active* is an open status for split rep commissions, meaning your rep will continue to get paid out for this deal at the appropriate interval. *Complete* or *Cancelled* are closed statuses, which will cease payments.
- You may add an internal only note at the bottom of this dialogue

The screenshot shows the 'RECURRING COMMISSION' dialog box. The 'Commissions' tab is selected at the top (callout 1). The 'Status' dropdown is open, showing 'Active' as the selected option (callout 2). The 'Sales Rep' dropdown is set to 'Corbit, Gary' (callout 3). The revenue information section (callout 4) shows: SRC Revenue: \$5,000.00, \* PCT: 10.00%, SRev Amt: \$500.00, SRC GP: \$0.00, \* PCT: 0.00%, SGP Amt: \$0.00, SManual: \$0.00, and \$Total RC Amt: \$500.00. The 'Begin Year' is 2022, 'Month' is January, '#Payments' is 60, and 'Frequency' is Monthly (callout 5). A note at the bottom reads: 'Recurring Commission for Up-sale on Premiere Service Plan'.

## Proposal and Order Pricing: Wizard Tab

The Wizard Tab allows you to generate custom proposal documents. You can customize the information and pages that are included on proposal documents.

### Key:

- 1) Select the price level for optional accessories
- 2) Optional Accessory dialogue
- 3) Select what information is included on the proposal document and enter current monthly cost
- 4) Select which pages are included in the generated proposal document
- 5) Name and generate a proposal document
- 6) Document generation history

The screenshot shows the 'Wizard Tab' interface for generating proposal documents. It includes a table of items, a section for selecting lease terms and cash options, a list of proposal documents to include, and a table for document generation history.

**1** Price Options Only At: Order Price Level

**2** View 1 - 1 of 1

Item#	Model	Qty	RepCost\$	Credit	Sell	Total\$	Lease Pymt	24mo Pymt	36mo Pymt	48mo Pymt	60mo Pymt	Replaces
B#: 4 imageRUNNER ADVANCE C7565i III												
0100C002AA	Booklet Finisher-X1	1	\$5,040.00	\$0.00	\$8,126.41	\$8,126.41	\$272.23	\$403.07	\$272.23	\$214.54	\$174.72	Staple Finisher-X1

**3** Include Lease Term(s) on the proposal: ☐ 24mo ☒ 36mo ☒ 48mo ☐ 60mo  
 Show Cash Option on the proposal: ☒  
 Exclude Supplies on the proposal: ☒  
 Current Monthly Cost: \$7,500.00 ☒ Include on proposal

**4**

Name	Object
4. Proposal Docs	
<input type="checkbox"/> NEW SalesChain Proposal Cover Pages	Proposal
<input type="checkbox"/> NEW SalesChain Proposal DataSheet	Proposal
<input type="checkbox"/> NEW SalesChain Proposal Solution Sheet V2	Proposal
<input type="checkbox"/> NEW SalesChain Proposal The End Page	Proposal

Name:   
 Generate  
 #Copies: 1  
☐ Format for Duplex Print

Date	Name	By User	Action
Order ID# 3451 Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/25/22 4:47PM	asdfasd	Corbit, G	<a href="#">rename</a>
01/25/22 4:46PM	adsfasdf	Corbit, G	<a href="#">rename</a>
01/25/22 11:31AM	Main	Corbit, G	<a href="#">rename</a>
01/25/22 11:02AM	Test	Corbit, G	<a href="#">rename</a>

**5**

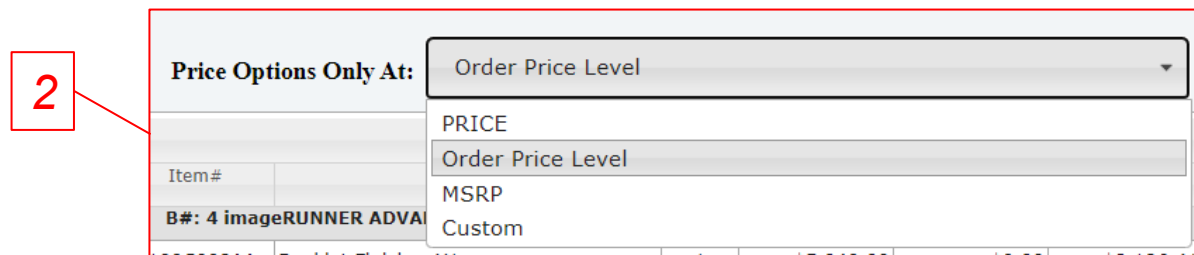
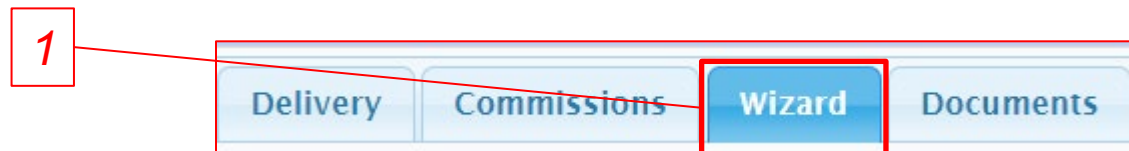
**6**

## How To: Change Pricing Levels for Optional Accessories

It is possible to price optional accessories at the same, or at a different value than the order's pricing rules dictate. This can help you make optional up-sales more appealing in some cases.

To change the optional accessory pricing level:

1. Navigate to the *Wizard* Tab
2. Select your desired price level from the *Accessory Price Level Drop Down*



### Quick Tip:

Selecting the *Custom* price level will allow you to edit the accessory values in the table (Right)

Price Options Only At:		Custom			
Item#	Model	Qty	RepCost\$	Credit	Sell
B#: 4 imageRUNNER ADVANCE C7565i III					
0100C002AA	Booklet Finisher-X1	1	\$5,040.00	\$0.00	8126.41

## How To: Associate Optional Accessories For Upgrade

If an optional accessory upgrade is meant to replace an accessory that is priced on the deal, you can associate the upgrade accessory in the Wizard tab to calculate and present the appropriate incremental upgrade cost on your proposal.

To associate an optional upgrade with a priced accessory:

1. Navigate to the Wizard tab
2. Select the accessory that this optional upgrade is meant to replace from the drop down in the *Replaces* column

1

Price Options Only At: Order Price Level

Item#	Model	Qty	RepCost\$	Credit	Sell	Total\$	Lease Pymt	24mo Pymt	36mo Pymt	48mo Pymt	60mo Pymt	Replaces
B#: 4 ImagerUNNER ADVANCE C7565I IIII												
_0100C002AA	Booklet Finisher-X1	1	\$5,040.00	\$0.00	\$8,126.41	\$8,126.41	\$272.23	\$403.07	\$272.23	\$214.54	\$174.23	2 Staple Finisher-X1

2

Replaces

Staple Finisher-X1 ▼

Select

Staple Finisher-X1

## How To: Customize the Information Shown on a Proposal

The proposal wizard makes it possible to customize what information is displayed or redacted from your proposal's *Solution Sheet*.

*Note: For instructions on generating a proposal after you have made these customizations, see page 156.*

To Change the information displayed on your proposal document's solution sheet:

1. Navigate to the Wizard tab
2. Use the check boxes below the optional accessories table to determine what information will be displayed
3. Click the red flashing Save button

### Quick Tip:

To include the monthly cost that your prospective customer is paying, you must enter a dollar value in the text box **AND** check the *Include on Proposal* box.

1

Delivery Commissions **Wizard** Documents

2

**Include Lease Term(s) on the proposal:** ☐ 24mo ☒ 36mo ☒ 48mo ☐ 60mo

**Show Cash Option on the proposal:** ☒

**Exclude Supplies on the proposal:** ☒

**Current Monthly Cost:** \$7,500.00 ☒ Include on proposal

3

Breakdown Book **Save** Remove

		<u>36 Month</u>	<u>48 Month</u>
Monthly Lease Investment		\$5,000.40	\$3,940.62
Service Agreement		\$733.48	\$733.48
Less Current Monthly Cost		<u>-\$7,500.00</u>	<u>-\$7,500.00</u>
Incremental Monthly Investment / Savings		\$-1,766.12	\$-2,825.90
<b>Optional Accessories</b>			
	<u>Purchase</u>		
imageRUNNER ADVANCE C7565i III			
Booklet Finisher-X1	\$2,539.50	\$85.07	\$67.04

## How To: Generate a Proposal

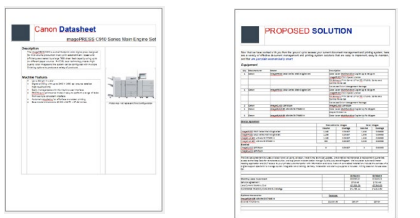
Once you have customized the information you want to display on your proposal ([see page 155](#)) you are able to generate a proposal document.

To generate a proposal:

1. Navigate to the Wizard tab
2. Select the pages you would like to include in your proposal document package. **Note: SalesChain imports your proposal document templates, so the available pages will vary, depending on system configuration**
3. Click the red flashing Save button
4. Give your proposal document package a name that is easy to remember
5. Click **Generate** **Note: this will open a new window with a document editor where you can view, download, edit or print your proposal document**

### Quick Tip:

The *Data Sheet* (Left) provides stats and pictures for each of the machines priced on your proposal. The *Solution Sheet* (Right) is the proposal's financial summary page.



1. Wizard tab

2. Proposal Docs table:

	Name	Object
<input checked="" type="checkbox"/>	NEW SalesChain Proposal Cover Pages	Proposal
<input checked="" type="checkbox"/>	NEW SalesChain Proposal DataSheet	Proposal
<input checked="" type="checkbox"/>	NEW SalesChain Proposal Solution Sheet V2	Proposal
<input checked="" type="checkbox"/>	NEW SalesChain Proposal The End Page	Proposal

3. Breakdown Book **Save** Remove

4. Name: Test

5. Generate

#Copies: 1

☐ Format for Duplex Print


## Proposal and Order Pricing: Documents Tab

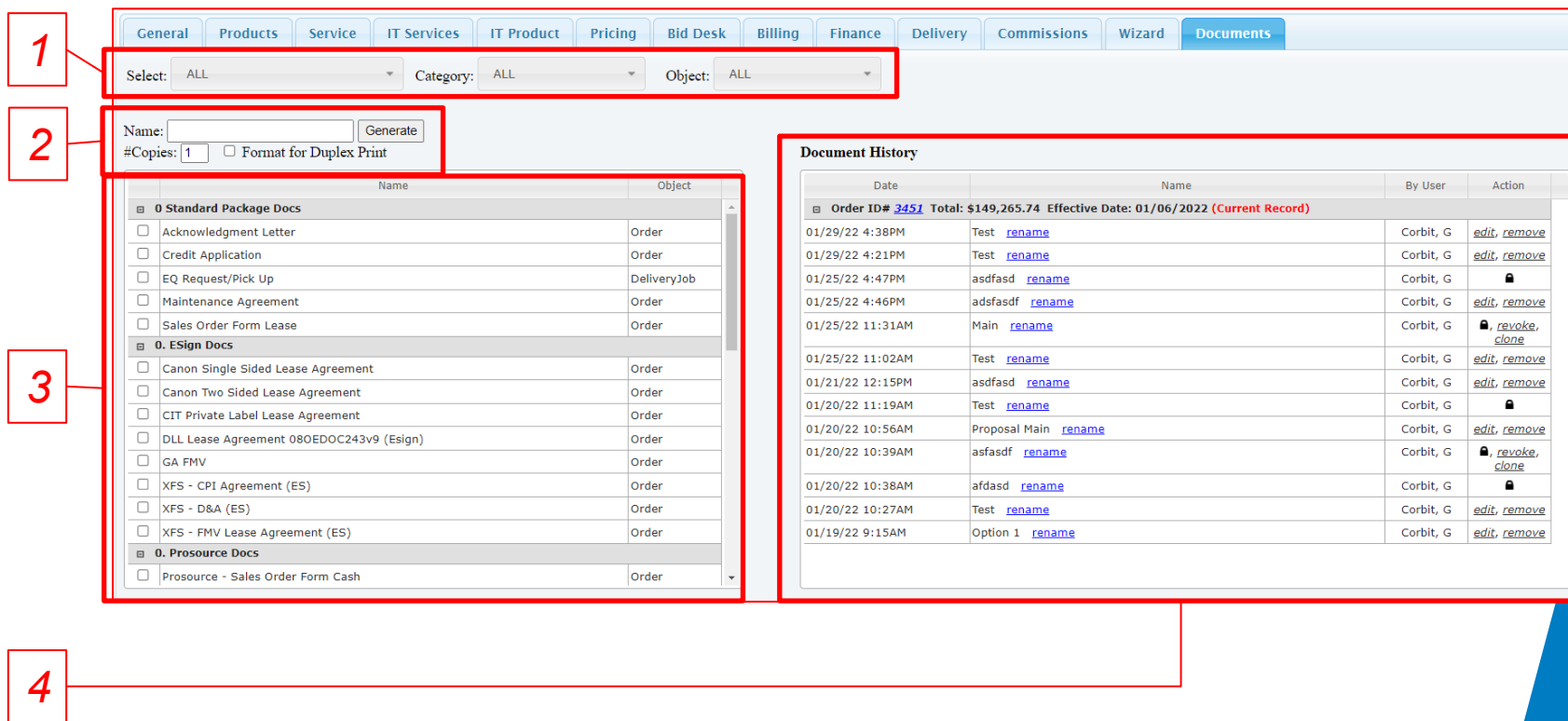
The Documents tab allows you to generate all relevant internal, delivery, and legal documents for this proposal or order.

### Key:






- 1) Filter documents shown in the selection box
- 2) Name and generate document packages
- 3) Select documents from this window to include them in a document package.
- 4) Document history, all generated documents generated related to this order will be displayed here. You can view, rename, edit, clone or revoke documents here (See pages 159 - 164)

### Quick Tips:

Documents sent for e-sign will be locked from editing and will display a lock icon  in the *Action* column.



The screenshot shows the 'Documents' tab in the SalesChain application. The interface includes a top navigation bar with tabs like General, Products, Service, IT Services, IT Product, Pricing, Bid Desk, Billing, Finance, Delivery, Commissions, Wizard, and Documents. Below the navigation bar, there are filters for 'Select', 'Category', and 'Object', all set to 'ALL'. A 'Name' field with a 'Generate' button and a '#Copies' field with a 'Format for Duplex Print' checkbox are also present. The main area is divided into two sections: '0 Standard Package Docs' and '0. ESign Docs'. The '0 Standard Package Docs' section contains a list of documents with checkboxes and 'Object' types. The '0. ESign Docs' section contains a list of documents with checkboxes and 'Object' types. A 'Document History' table is also visible, showing a list of documents with columns for Date, Name, By User, and Action. The table includes a summary row for 'Order ID# 3451' and a list of document entries with their respective dates, names, users, and actions.

Date	Name	By User	Action
Order ID# 3451 Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/29/22 4:38PM	Test	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/29/22 4:21PM	Test	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/25/22 4:47PM	asdfsad	Corbit, G	
01/25/22 4:46PM	adsfasdf	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/25/22 11:31AM	Main	Corbit, G	 , <a href="#">revoke</a> , <a href="#">clone</a>
01/25/22 11:02AM	Test	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/21/22 12:15PM	asdfsad	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/20/22 11:19AM	Test	Corbit, G	
01/20/22 10:56AM	Proposal Main	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/20/22 10:39AM	asfasdf	Corbit, G	 , <a href="#">revoke</a> , <a href="#">clone</a>
01/20/22 10:38AM	afdasd	Corbit, G	
01/20/22 10:27AM	Test	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/19/22 9:15AM	Option 1	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>

You are able to generate any documents related to this order from the Documents tab. You can generate single documents or create a package by selecting multiple documents.

To generate a document package:

1. Navigate to the *Documents* tab
2. Select the documents you would like to include in your document package. **Note: SalesChain imports your document templates, so the available documents will vary depending on system configuration**
3. Give your proposal document package a name that is easy to remember
4. Click **Generate** **Note: This will open a new window with a document editor where you can view, download, or print your document package**

## Quick Tips:

- While your specific documents may vary, there will usually be headers for both e-Sign and non e-Sign documents. Be sure to generate the e-Sign versions of documents if you would like to sign them electronically. **Important: you CANNOT mix and match e-sign and non e-sign documents**
- If your document package contains e-signable documents, the *Sign* button will appear. If your document package contains no e-signable documents, the *Sign* button will not appear.



## How To: Generate a Document Package

**1** Click the **Documents** tab.

**2** Select the documents you would like to include in your document package. **Note: SalesChain imports your document templates, so the available documents will vary depending on system configuration**

Name	Object
<b>Standard Package Docs</b>	
<input type="checkbox"/> Acknowledgment Letter	Order
<input checked="" type="checkbox"/> Credit Application	Order
<input type="checkbox"/> EQ Request/Pick Up	DeliveryJob
<input checked="" type="checkbox"/> Maintenance Agreement	Order
<input type="checkbox"/> Sales Order Form Lease	Order
<b>eSign Docs</b>	
<input type="checkbox"/> Canon Single Sided Lease Agreement	Order
<input type="checkbox"/> Canon Two Sided Lease Agreement	Order
<input type="checkbox"/> CIT Private Label Lease Agreement	Order
<input type="checkbox"/> DLL Lease Agreement 080EDOC243v9 (Esign)	Order
<input checked="" type="checkbox"/> GA FMV	Order

**3** Enter a name for the package: **Order 3451 Main Doc Package**

**4** Click **Generate**

#Copies: **1** ☐ Format for Duplex Print

The generated document is a **CREDIT APPLICATION** form. It includes sections for:

- BUYER'S INFORMATION:** Full Legal Name, Tax Identification Number, Company Name, Address, Phone Number, Email, Contact, Nature of Business, Years in Business, No. of Employees, Principal/Person Officer, Social Security No.
- EQUIPMENT INFORMATION:** Equipment Name, Payment, \$1 OUT, Prepaid, Plans Term, Upgrade, Lease Company, Lease Number.

You may rename any document packages you have generated for easy reference, even if they have been locked for e-Sign.

To rename a document package:

1. Navigate to the *Documents* tab
2. Click the blue *rename* link next to the document package for which you would like to change the name
3. In the pop-up dialogue, enter your new desired name in the *Name* text box
4. Click *Save*

## How To: Rename a Document Package

**1** Navigate to the *Documents* tab

**2** Click the blue *rename* link next to the document package for which you would like to change the name

**3** In the pop-up dialogue, enter your new desired name in the *Name* text box

**4** Click *Save*

Date	Name	By User	Action
Order ID# <a href="#">3451</a> Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/29/22 7:09PM	Order 3451 Main Doc Package <a href="#">rename</a>	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/25/22 4:47PM	DLL Lease <a href="#">rename</a>	Corbit, G	<a href="#">lock</a>
01/20/22 11:19AM	Delivery Documents <a href="#">rename</a>	Corbit, G	<a href="#">lock</a>
01/20/22 10:56AM	Proposal Main <a href="#">rename</a>	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>

**Modify Generated Document Name**

Name

## How To: View and Edit a Document Package

You may view any document packages you have generated and edit those which have not been locked for e-Sign. This will open the document package in a document editor. See [page 161 - 164](#) for further actions.

*Important: You are not able to edit documents which have been locked for e-Sign, but you are able to view them in the document editor. (Step 2b)*

To view or edit a document package:

1. Navigate to the *Documents* tab
2. a) If the document package is not locked, click the black *edit* link in the *Action* column of the document package you would like to view or edit  
b) If the document package is locked, click on the lock icon in the *Action* column 🔒

**1**

Commissions Wizard **Documents**

**2a**

**2b**

**Document History**

Date	Name	By User	Action
Order ID# <a href="#">3451</a> Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/29/22 7:09PM	Order 3451 Main Doc Package <a href="#">rename</a>	Corbit, G	<a href="#">edit</a> <a href="#">remove</a>
01/25/22 4:47PM	DLL Lease <a href="#">rename</a>	Corbit, G	
01/20/22 11:19AM	Delivery Documents <a href="#">rename</a>	Corbit, G	
01/20/22 10:56AM	Proposal Main <a href="#">rename</a>	Corbit, G	<a href="#">edit</a> <a href="#">remove</a>

FILE HOME INSERT PAGE LAYOUT VIEW PROOFING

E-Sign Use Local Clipboard Paste (Server) Cut Copy

Document Clipboard

Arial 6 A<sup>+</sup> A<sup>-</sup> B I U

Main Street Technologies  
CT  
Phone: (203) 262-1611 Fax:

**CREDIT APPLICATION**

**BUSINESS INFORMATION**

Full Legal Name Lakeside Properties LLC	Tax Identification Number
Billing Street Address 5503 Lakeside Ave	City/State/Zip Henrico, VA 23228
Phone Number (480) 854-5898	Fax Number (000) 000-0702
Contact Donn Clarke	Contact Phone Number (999) 333-8888
Nature of Business	Years in Business / No of Employees
Home Street Address	City/State/Zip
	Phone No.

☐ PROPRIETORSHIP ☐ GENERAL PARTNERSHIP ☐ LIMITED PARTNERSHIP ☐ NOT FOR PROFIT ☐ CORPORATION  
☐ LIMITED LIABILITY ☐ STATE OR LOCAL GOVT ☐ STATE OF INC. ☐ DATE OF INC.

**EQUIPMENT INFORMATION**

Supplier Name \_\_\_\_\_ Contact \_\_\_\_\_

Term (months)	Payment	Product	Pass Thru	Upgrade	Lease Company	Lease Number
36	\$5,000.40	\$1 OUT	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

SalesChain's internal electronic signature utility allows you to send documents to be signed via email.

*Important: Only documents configured for e-Sign can be sent for e-Sign. If you do not see the E-Sign button (Step 1) in the document editor, the documents in your package have not been configured for E-Sign.*

To request an electronic signature via email:

1. Open or generate the desired document package using the methods outlined on pages [158](#) and [160](#)
2. Click the *E-Sign* button. *Note: this will lock the document package and prevent you from editing it. Be sure to make any changes **before** clicking the E-Sign button.*
3. Click the *Request* button
4. In the pop-up dialogue you may either a) select the contact you would like to request a signature from using the *Select* dropdown **OR** b) click the + icon to add a new contact
5. Click *Send*
6. Make any desired changes to the signature request email for your contact
7. Click *Send*

#### Quick Tips:

- The *revoke* and *clone* link will both appear when a document has been sent for signature but has not yet been signed.
- You can view a document's e-Sign process using the Signature desk ([See page 165](#))

## How To: Send a Document for e-Sign

1. Click the **E-Sign** button in the top-left toolbar.

2. Click the **Request** button in the **Document** panel.

3. Click the **Sign** button in the **Document** panel.

4a. Select a contact from the dropdown menu (e.g., **Clarke, Donn** or **Doe, John**).

4b. Click the **+** icon to add a new contact.

5. Click the **Send** button.

6. In the **E-mail Message** dialog box, fill in the fields: **From** (Gary Corbit), **To** (JohnDoe@lakeside.com), **CC**, **BCC**, and **Subject** (Document Signature Request).

7. Click the **Send** button in the **E-mail Message** dialog box.

SalesChain's internal electronic signature utility allows you to sign documents on the spot with your client using a computer or tablet.

*Important: Only documents configured for e-Sign can be sent for e-Sign. If you do not see the E-Sign button (Step 1) in the document editor, the documents in your package have not been configured for E-Sign.*

To e-Sign a document on the spot:

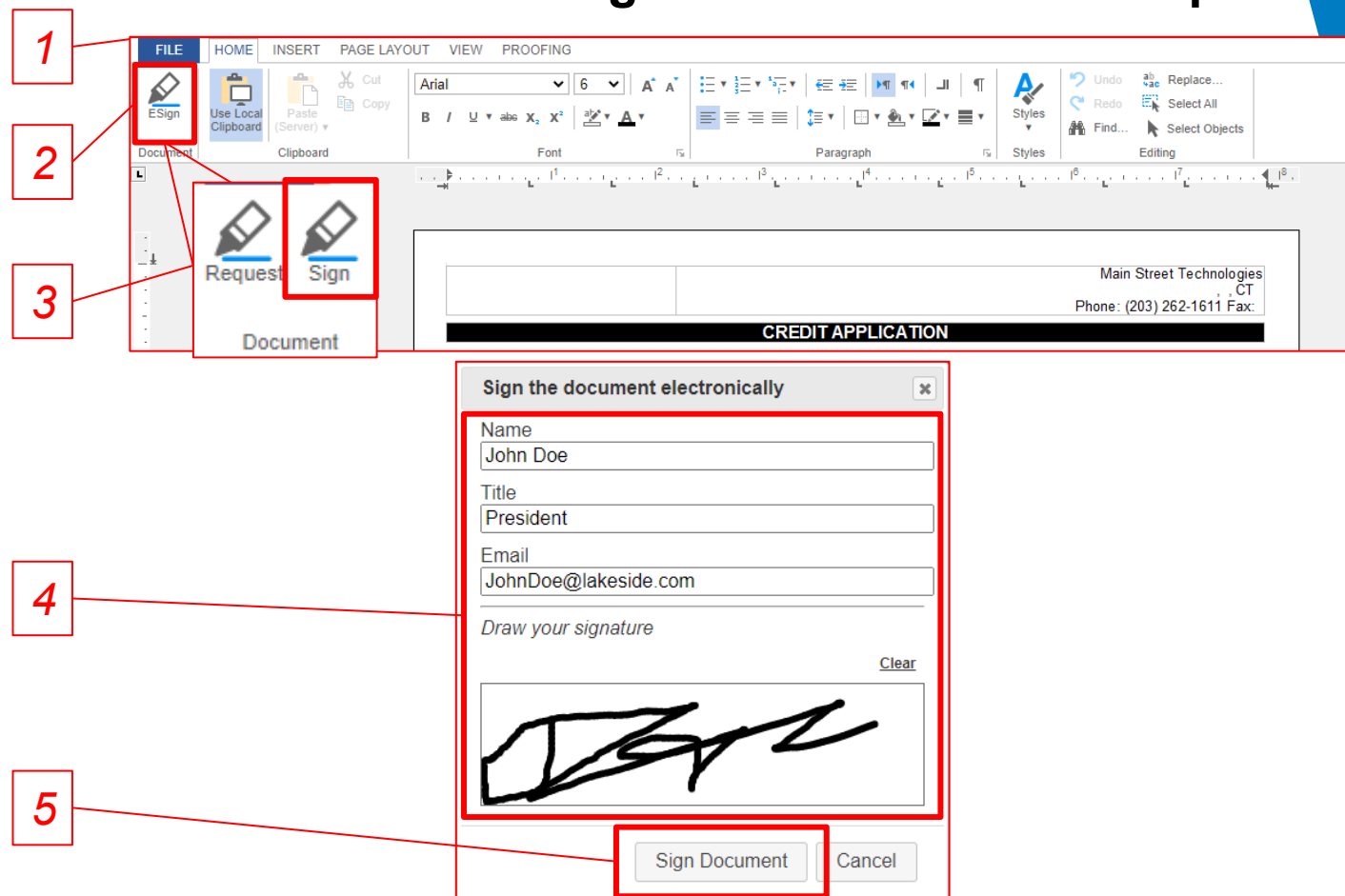
1. Open or generate the desired document package using the methods outlined on pages [158](#) and [160](#)
2. Click the *E-Sign* button. *Note: this will lock the document package and prevent you from editing it. Be sure to make any changes **before** clicking the E-Sign button.*
3. Click the *Sign* button
4. Have your contact enter their name, title, email and draw their signature in the dialogue box.
5. Have your contact click *Sign Document*

**\*\* Repeat step 5 for all signature locations required.\*\***

**Quick Tip:**

You can view a document's e-Sign process using the Signature desk ([See page 165](#))

## How To: e-Sign a Document on the Spot



## How To: Revoke a Signature Request

You are able to revoke a signature request if the person from whom you have requested an electronic signature has not signed the document package yet.

To revoke a document package that has been sent for e-Sign:

1. Navigate to the *Documents* tab
2. Click the black *revoke* link next to the document package you would like to revoke.
3. In the pop-up dialogue, click *OK*

### Quick Tips:

The *revoke* link will only appear in the specific circumstance that a document package has been sent but not yet signed. If the document package has already been signed, it will be fully locked and cannot be revoked.

**Document History**

Date	Name	By User	Action
Order ID# <a href="#">3451</a> Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/29/22 7:09PM	Order 3451 Main Doc Package <a href="#">rename</a>	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/25/22 4:47PM	DLL Lease <a href="#">rename</a>	Corbit, G	
01/20/22 11:19AM	Internal Delivery Docs <a href="#">rename</a>	Corbit, G	
01/20/22 10:56AM	Proposal Main <a href="#">rename</a>	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/20/22 10:39AM	Option 2 <a href="#">rename</a>	Corbit, G	<a href="#">revoke</a> , <a href="#">clone</a>
01/20/22 10:38AM	Maintenance Agreement <a href="#">rename</a>	Corbit, G	
01/20/22 10:27AM	Test <a href="#">rename</a>	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>
01/19/22 9:15AM	Option 1 <a href="#">rename</a>	Corbit, G	<a href="#">edit</a> , <a href="#">remove</a>

www.mysaleschain.com says

Are you sure that you want to revoke this signature request?

**OK** Cancel

## How To: Clone a Document Package

You are able to clone a document package which has been sent for e-Sign if the person from whom you have requested an electronic signature has not signed the document package yet.

To clone a document package:

1. Navigate to the *Documents* tab
2. **Important:** Enter a name for this cloned document package in the *Name* text box
3. Click the black *clone* link next to the document package which you would like to duplicate.

### Quick Tips:

- The *revoke* and *clone* link will both appear when a document has been sent for signature but has not yet been signed.
- The cloned document will no longer be locked from editing, this method is useful for making changes to e-Sign documents without re-creating the whole document package.

1. **Documents** tab selected

2. **Name:** 3451 Main Doc Package Cloned **Generate**  
 #Copies: 1 ☐ Format for Duplex Print

3. **Document History**

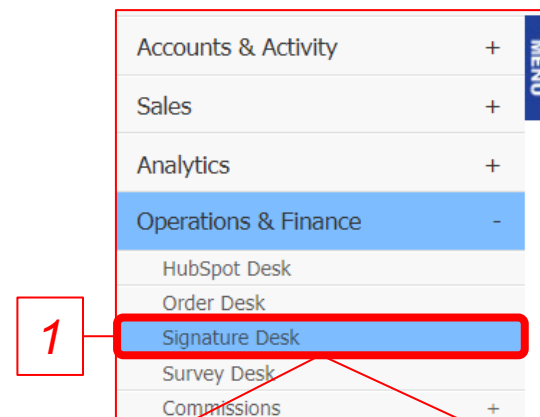
Date	Name	By User	Action
Order ID# 3451 Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/29/22 7:09PM	Order 3451 Main Doc Package <a href="#">rename</a>	Corbit, G	<a href="#">clone</a>
01/25/22 4:47PM	DLL Lease <a href="#">rename</a>	Corbit, G	<a href="#">clone</a>
01/20/22 11:19AM	Internal Delivery Docs <a href="#">rename</a>	Corbit, G	<a href="#">clone</a>
01/20/22 10:56AM	Proposal Main <a href="#">rename</a>	Corbit, G	<a href="#">edit, remove</a>
01/20/22 10:39AM	Option 2 <a href="#">rename</a>	Corbit, G	<a href="#">clone</a>
01/20/22 10:38AM	Maintenance Agreement <a href="#">rename</a>	Corbit, G	<a href="#">clone</a>
01/20/22 10:27AM	Test <a href="#">rename</a>	Corbit, G	<a href="#">edit, remove</a>
01/19/22 9:15AM	Option 1 <a href="#">rename</a>	Corbit, G	<a href="#">edit, remove</a>
01/29/22 7:09PM	Order 3451 Main Doc Package Cloned <a href="#">rename</a>	Corbit, G	<a href="#">edit, remove</a>
01/29/22 7:09PM	Order 3451 Main Doc Package <a href="#">rename</a>	Corbit, G	<a href="#">clone</a>

## How To: Track e-Sign Progress

You are able to track the progress of electronic signatures sent to your customers using the Signature Desk.

To track the progress of electronic signature requests:

1. Navigate to: *Menu Sidebar > User Settings > Signature desk*
2. You can view the status, actions taken, and user who took those actions for each document package here.



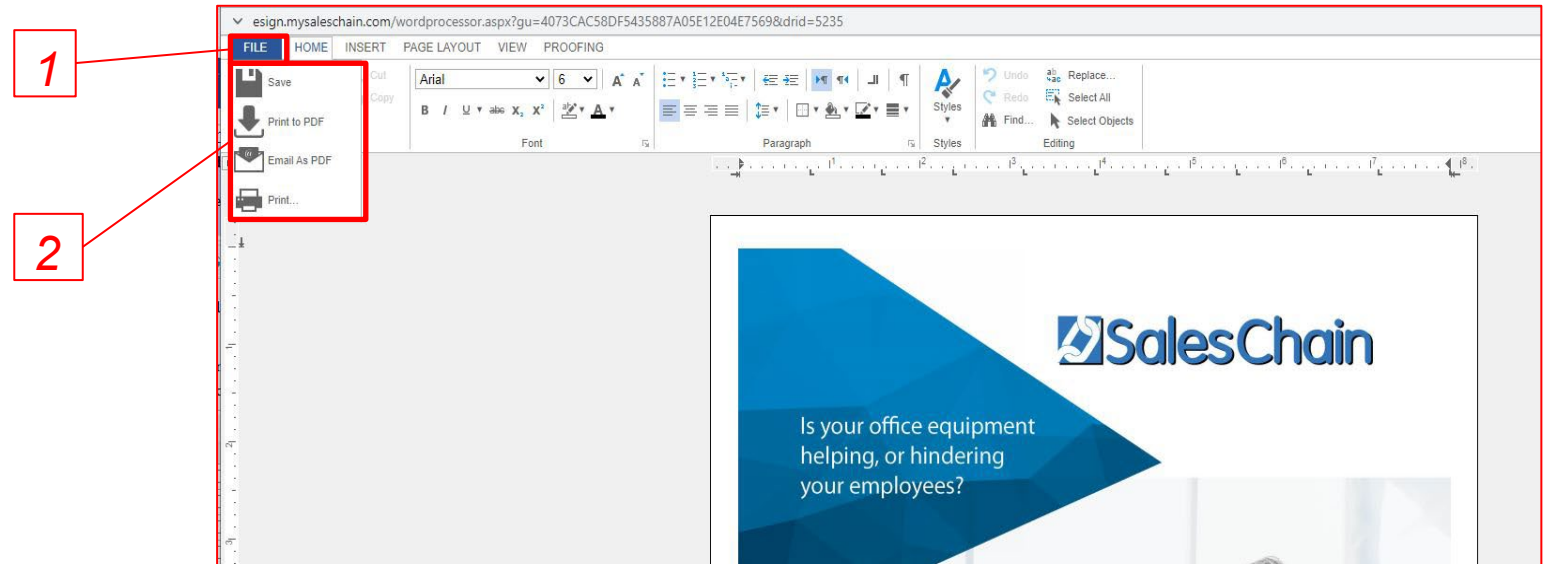
<div> <input type="checkbox"/> </div> <div> 5254 3451 Corbit, G </div> <div> </div>	SIGNED	5503 Lakeside Llc 5503 Lakeside Ave Henrico, VA 23228 (480) 854-5898  File Name: Order 3451 Main Doc Package Cloned DTCreated: 01/30/2022 ESignID: 5630321E67DA48C8B3800FC572842CD1	User	DATE	ACTION
			Corbit, G	01/30/22 12:08:06 PM	Send email with completed copy to signer To: JohnDoe@lakeside.com
			Corbit, G	01/30/22 12:08:06 PM	WF Notification Sales Rep BY: John Doe IP: 173.95.54.227
			Corbit, G	01/30/22 12:08:06 PM	Signed By User, Signature 2 BY: John Doe IP: 173.95.54.227
			Corbit, G	01/30/22 12:01:06 PM	Signed By User, Signature 1 BY: John Doe IP: 173.95.54.227
			Corbit, G	01/30/22 11:59:59 AM	Locked for signing
			Corbit, G	01/30/22 11:45:29 AM	Cloned

## How To: Send, Print, and Export Documents

Generating a document from the SalesChain system opens a document viewing window. From this window, you may send, share or print the document you have generated.

To send/export a document:

1. Click on *File* in the upper left-hand corner of the screen
2. Choose *Save*, *Print to PDF*, *Email as PDF* or *Print*



### Quick Tips:

- If the *Save* option is not displayed, clicking *Print to PDF* and then downloading the document will allow you to save it to your computer.
- For instructions on generating documents [see page 158](#).