mySalesChain® Platinum User Manual

Revision 3.1
Learn.SalesChain.com

Version History & Disclaimer

	Writer	Date
Version 1.0	Robert Schuldt	2012
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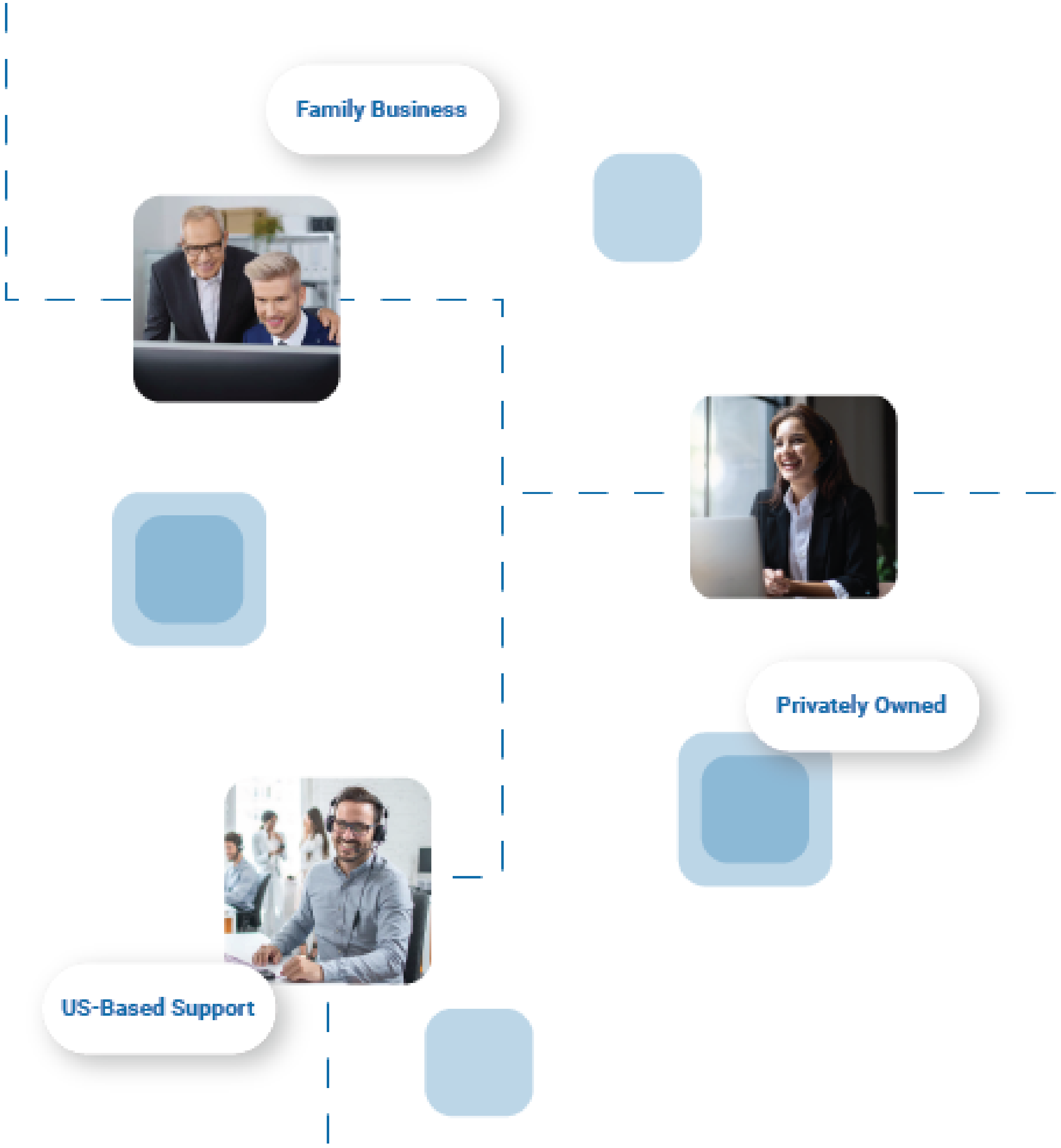
Version 3.0	Mary Ellen Hogan & Matthew Szczygiel	January 2022
Version 3.1	Mary Ellen Hogan & Matthew Szczygiel	April 2023

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
Hours: 9am-5pm EST Monday-Friday

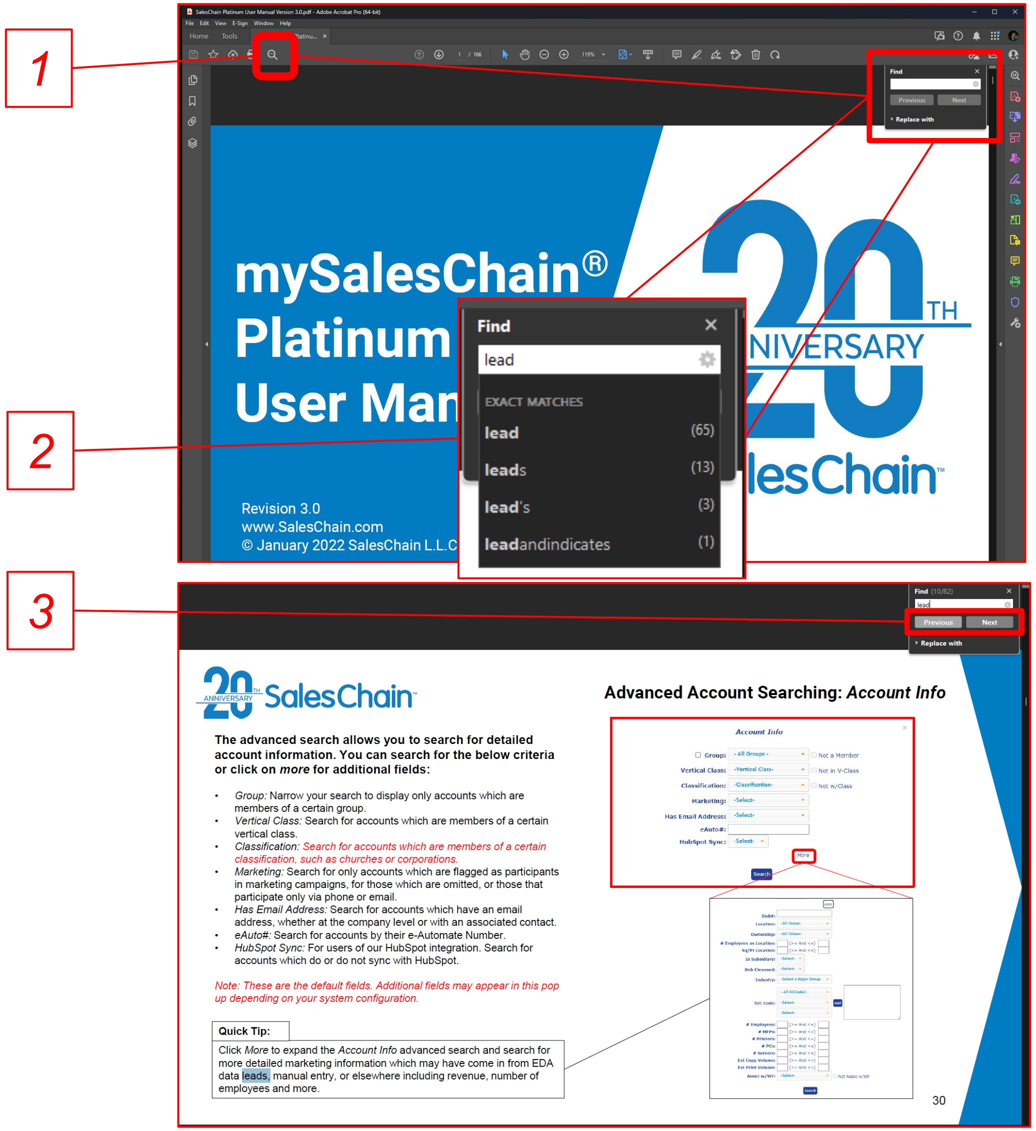


How To: Search this Manual (Adobe Acrobat)

To easily find your topic of choice, you can search this PDF user manual!

To search this manual:

1. Click the search icon or hit *Control-F* (*Command-F* for Mac) on your keyboard. A search box will appear at the top right.
2. Enter your desired topic in the search box. *Note: The number in parenthesis next to the search results indicates how many times that word or phrase appears in the document.*
3. Use the *Next* and *Previous* buttons to navigate search results and find your desired topic.



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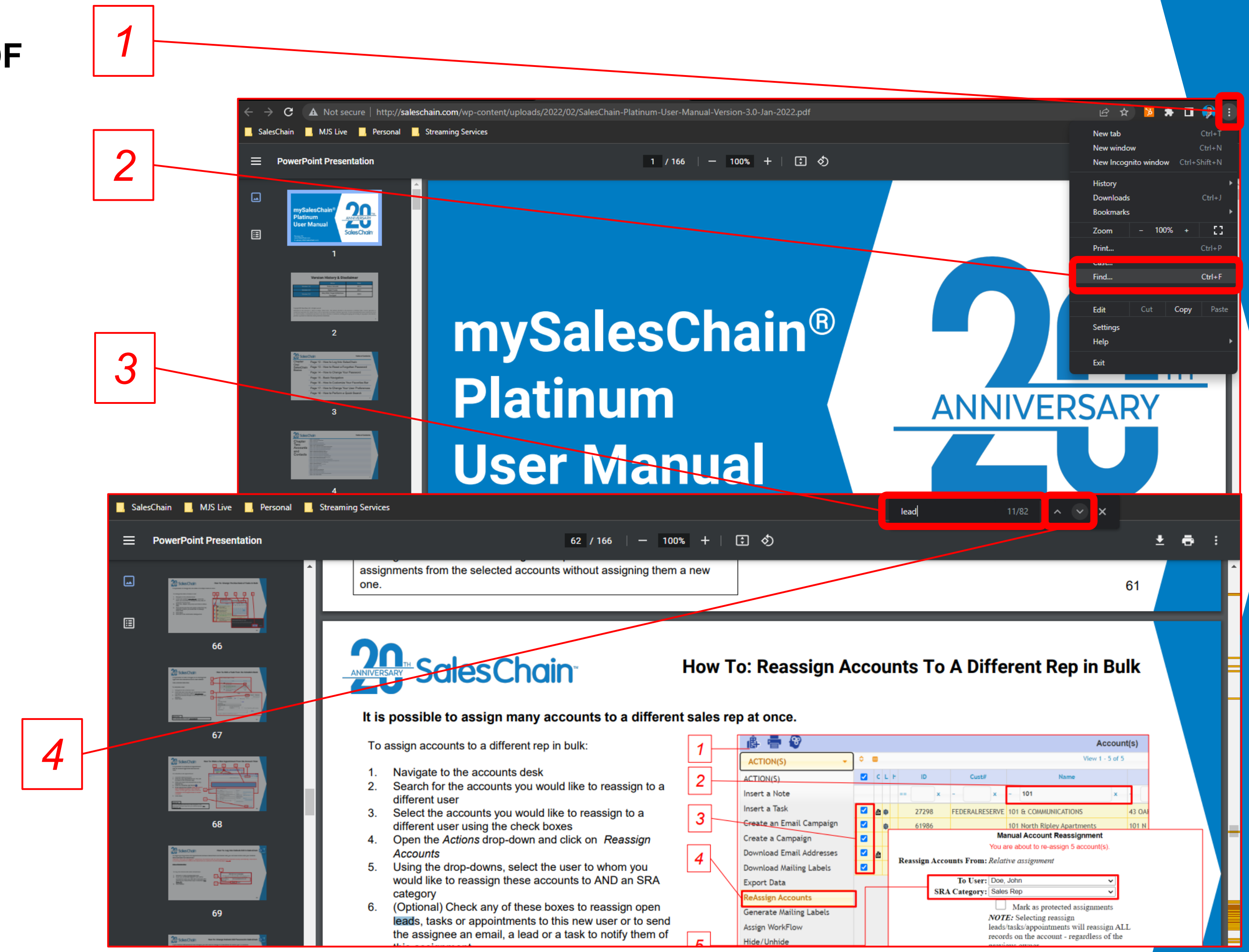
How To: Search this Manual (Google Chrome)

To easily find your topic of choice, you can search this PDF user manual!

To search this manual:

1. Open the Chrome menu by clicking on the vertical … icon.
2. In the menu, click *Find.* Note: Alternatively, hit Control-F (Command-F for Mac) on your keyboard.
3. Enter your desired topic in the search box. *Note: The fractional number next to the search result indicates how many results in the document match your search.*
4. Use the *up* and *down* arrows to navigate search results and find your desired topic.



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SalesChain Basics:

Basic navigation, login instructions, and customization of user preferences

How To: Log Into SalesChain

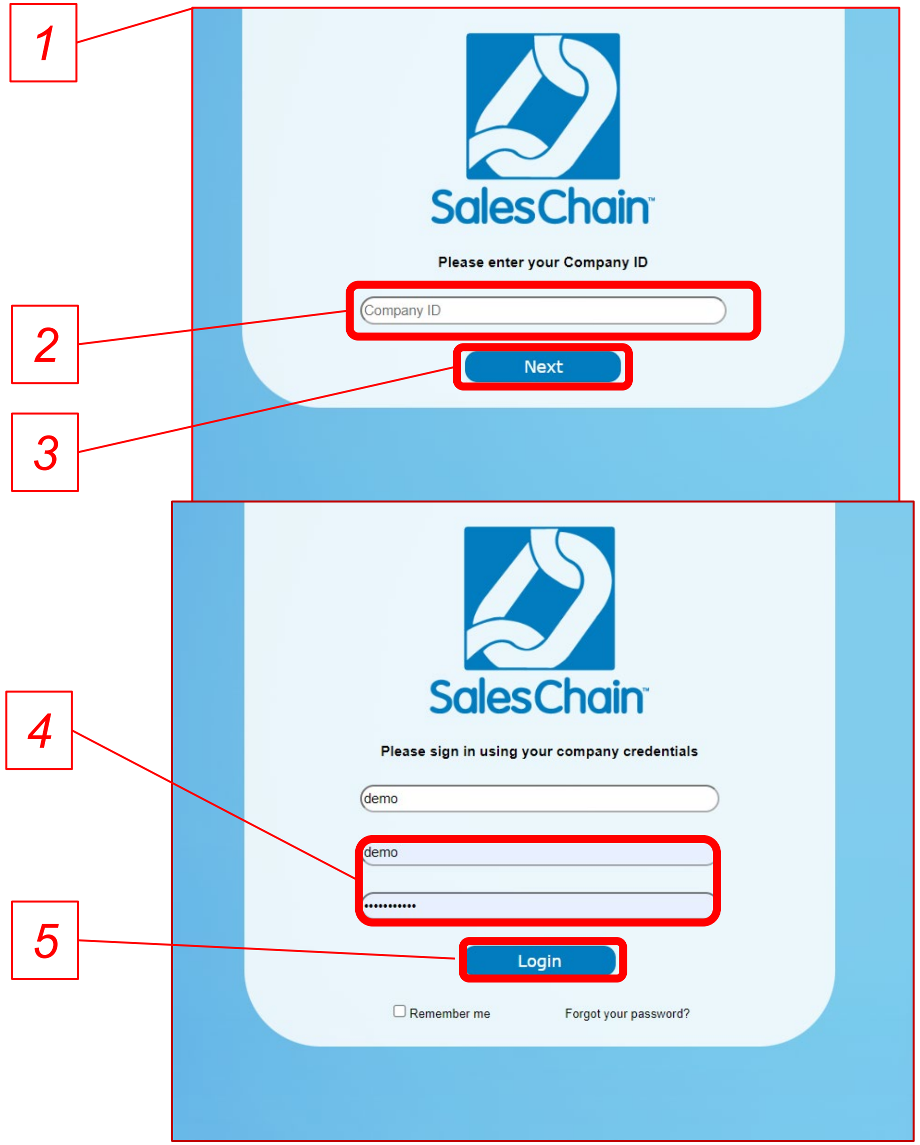
Logging into the SalesChain system should feel familiar for any digital native!

To log into SalesChain:

1. Navigate to www.mysaleschain.com or click the *Log In* button at www.saleschain.com
2. Enter your company ID
3. Click *Next*
4. Enter your user ID and password
5. Click *Login*

Note: If you are on a trusted computer, you may choose to click the Remember Me box.

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.

How To: Log Into SalesChain With Microsoft SSO

To log into SalesChain using Microsoft SSO (single sign on):

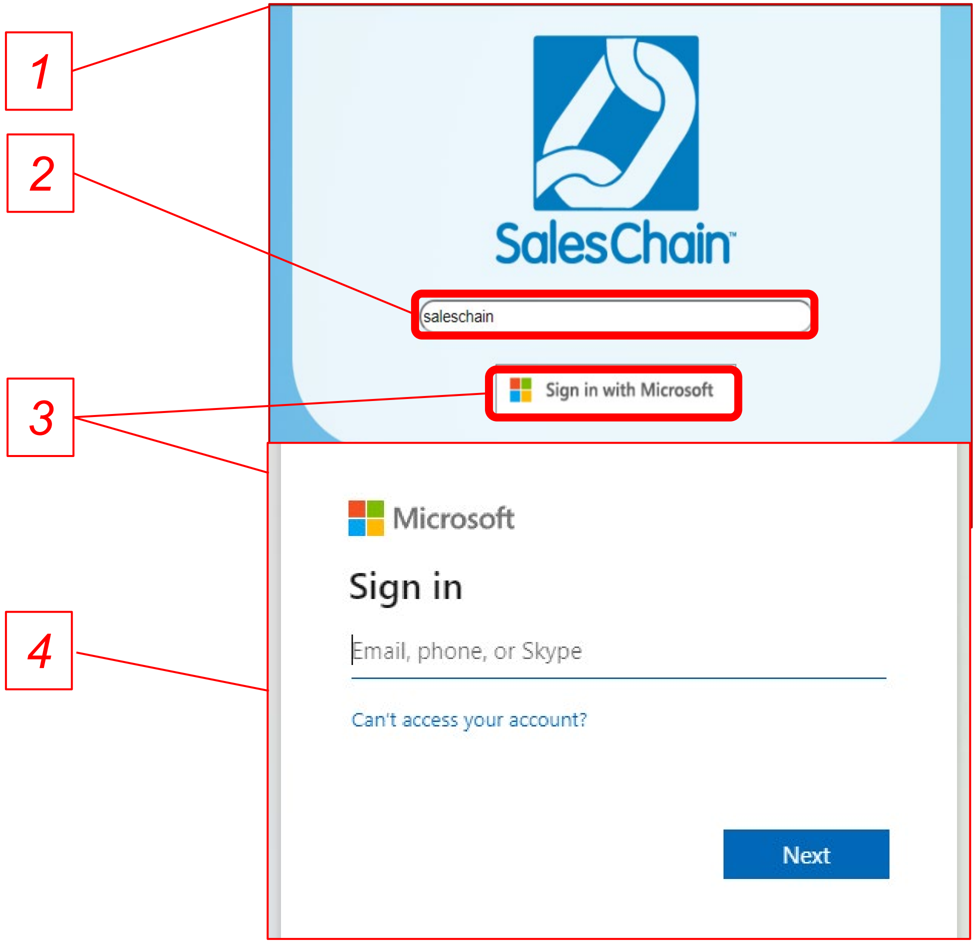
1. Navigate to www.mysaleschain.com or click the *Log In* button at www.saleschain.com
2. Enter your company ID
3. Click *Sign in with Microsoft.*

Note: If you have not logged in to Microsoft on this computer, or have not remembered your password on this computer, you will be directed to the Microsoft SSO page. If you have remembered your password on this computer, you will be logged in after this stage and redirected to your SalesChain home screen and can skip step 4.

4. Enter your Microsoft 365 email and login through your provider.

Once you have successfully logged in, you will be redirected to your SalesChain home screen.

View a tutorial video here



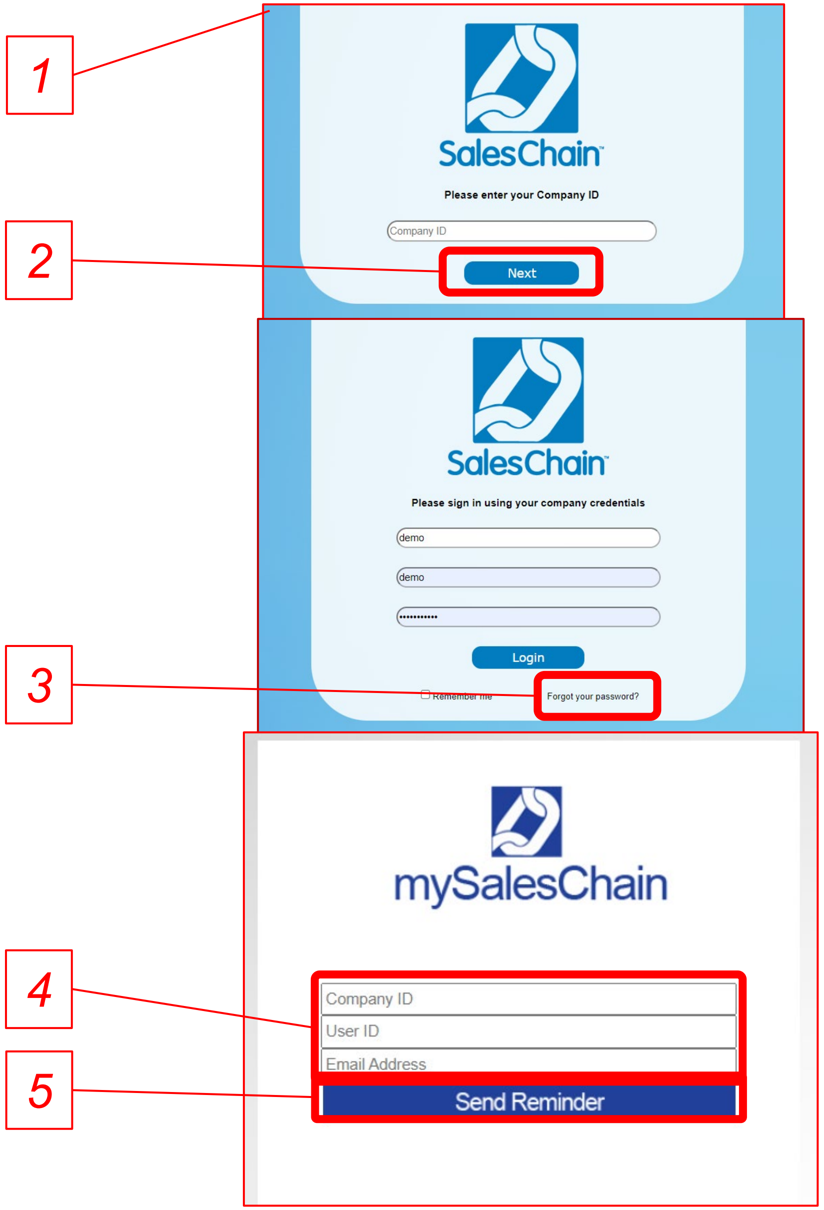
How to: Reset a Forgotten Password

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
2. Enter your company ID and click *Next*
3. Click on *Forgot your password?* On the login screen:
4. Enter your company ID, user ID, and email address
5. Click *Send Reminder*

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!*



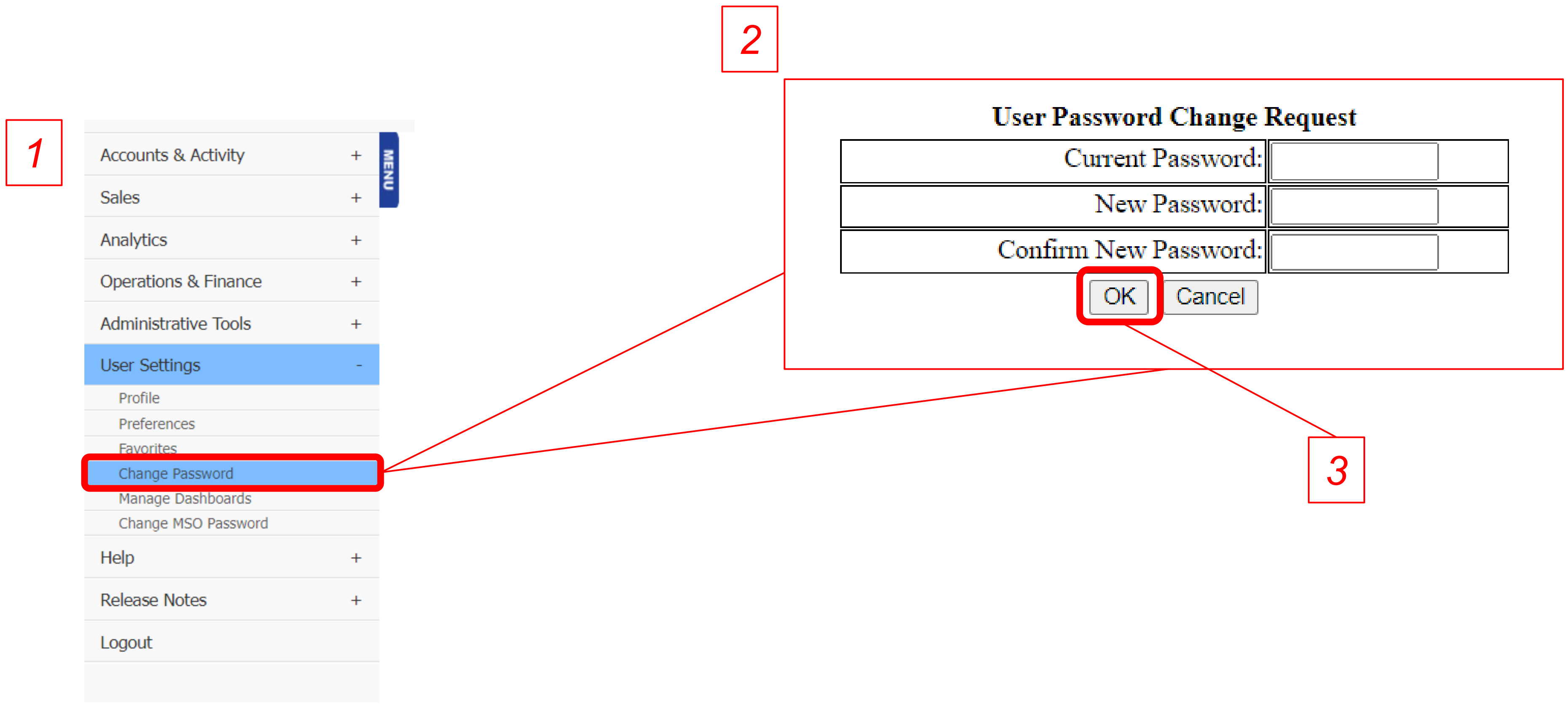
Quick Tip:

If all else fails when trying to reset your password, please contact SalesChain's help desk. You can find their information here.

How To: Change Your Password

To change your SalesChain Account Password:

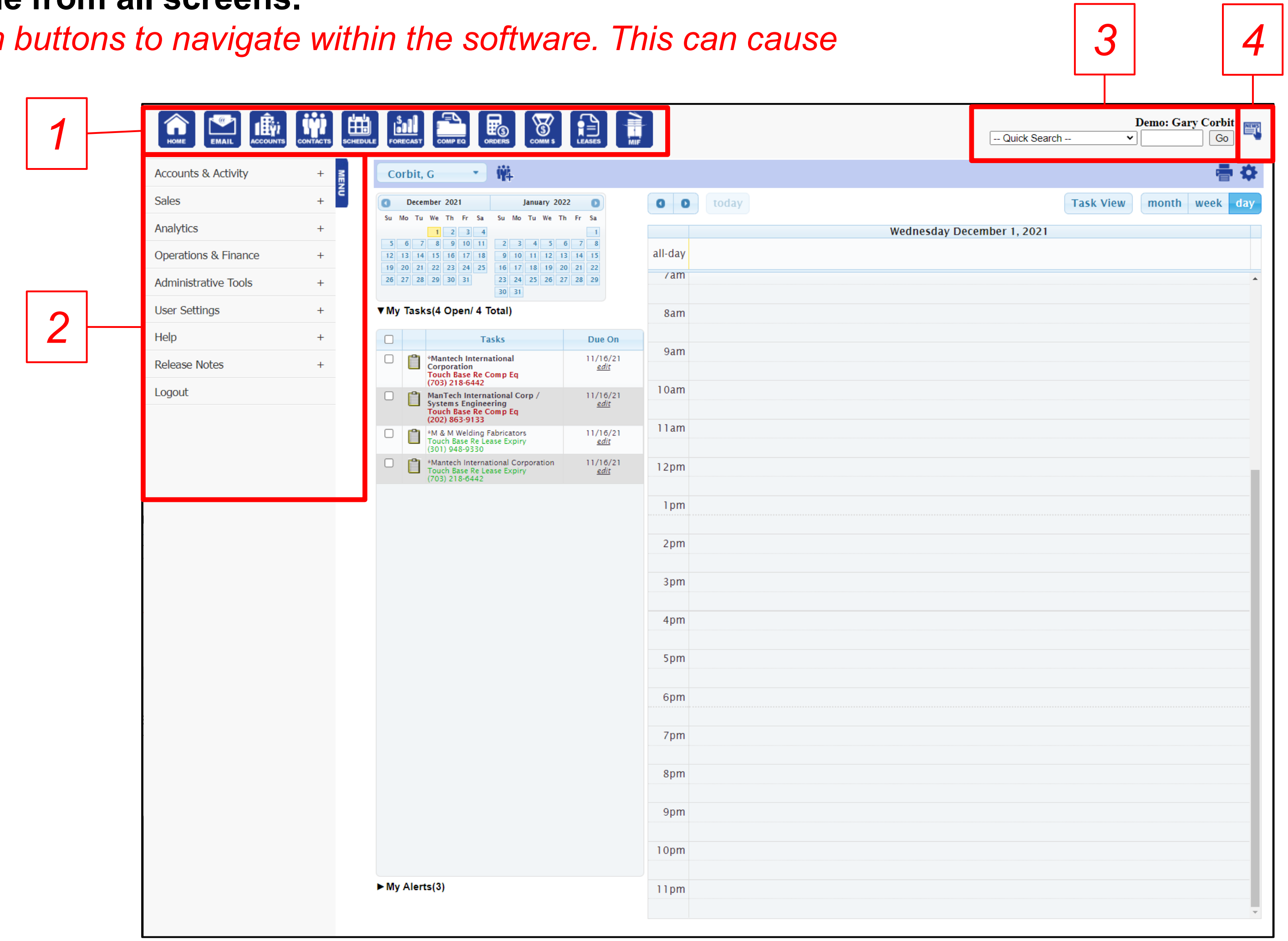
1. Navigate to: *Menu Sidebar > User Settings > Change Password*
2. Enter your Current and desired new password
3. Click “Ok”



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.*

Click here to view a tutorial video



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 14.
4) **News button.** Displays recent SalesChain announcements

Quick Tip:

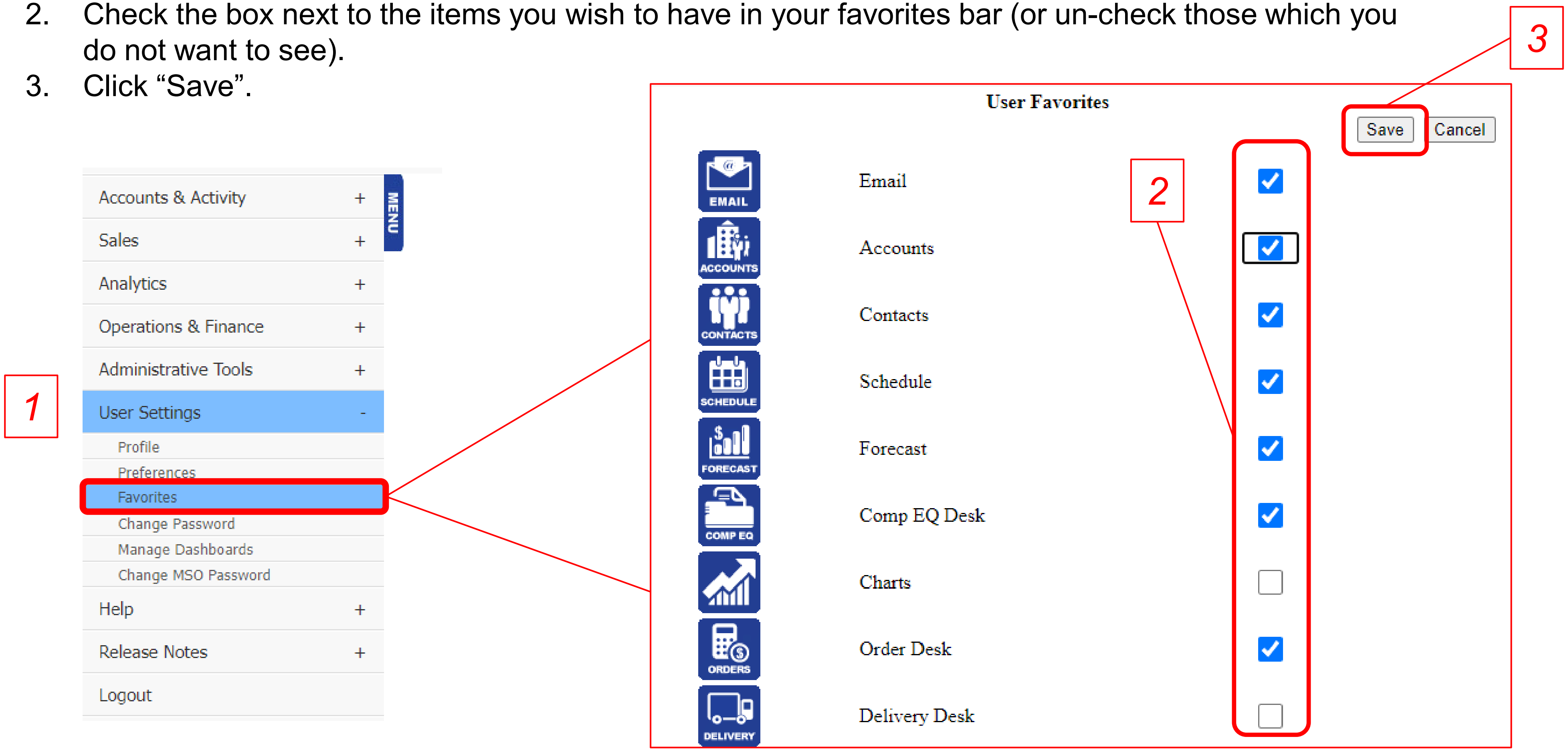
The Home Icon returns to the top level of the currently used tool.

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”.



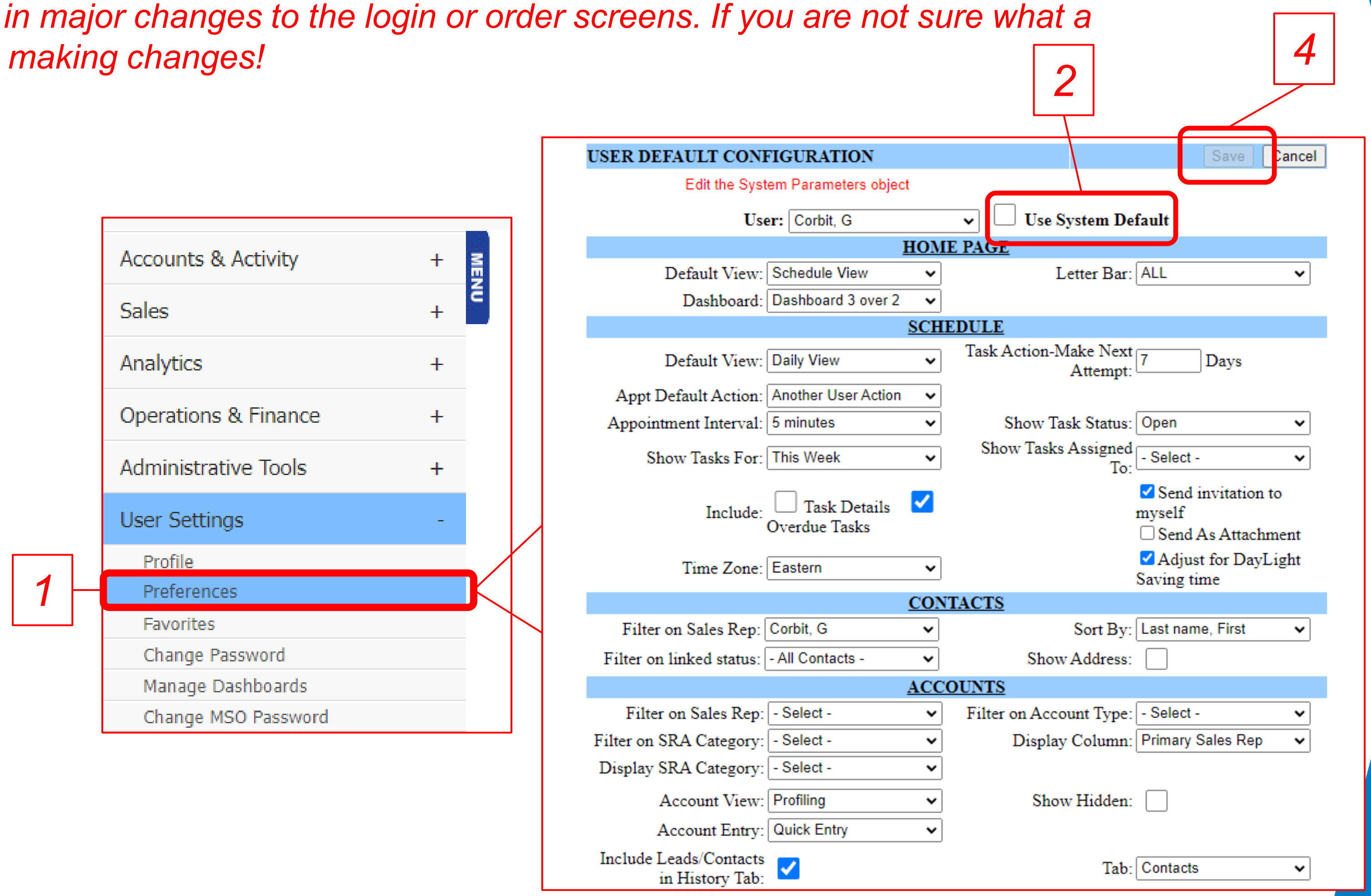
How To: Change User Preferences

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



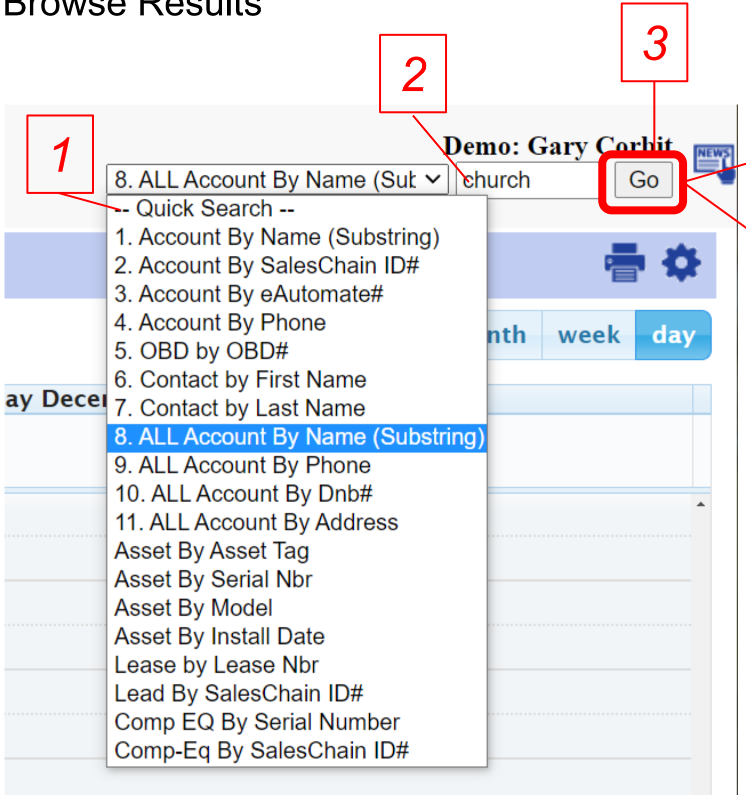
Quick Tip:

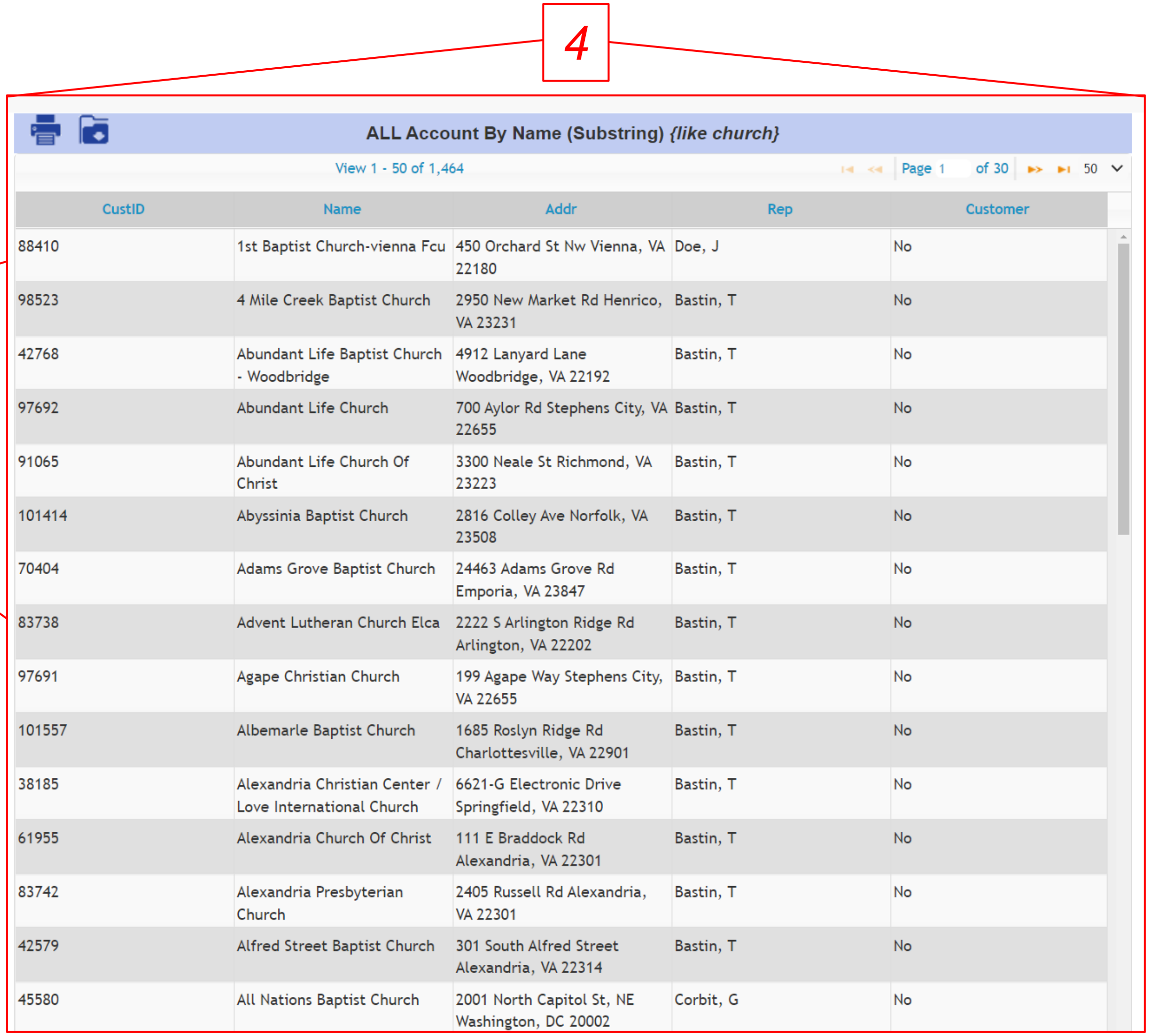
You must log out and log back in for any changes to take effect.

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





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

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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 ACCOUNTS
- 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

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Columns In the Accounts Desk

Column	Description
C	C stands for *Customer* and indicates the account is a customer.
L	L stands for *Lead* and indicates the account has an active lead.
H	H stands for *HubSpot* 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 *Customer Number*. 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 *Lease Legal* and displays the Legal name of the company which this account record represents.
DBA	DBA is short for *Doing Business As* 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 for *Classification* and is highly customizable based on configuration. It displays profile targeting by size, product type, and customer status.
VClass	VClass is short for *Vertical Class* and displays this account record’s vertical class association.

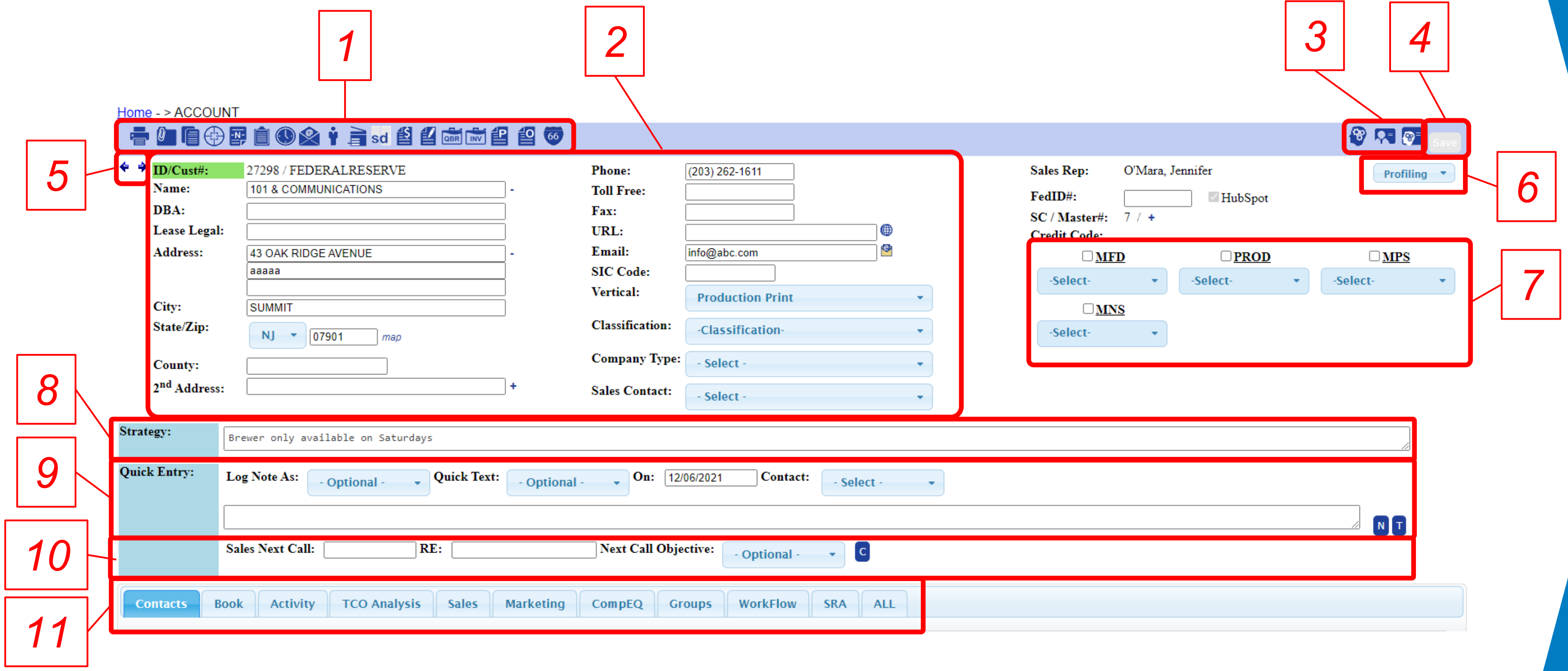
Account View

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

**See Page 19 for more information regarding the icons & page 20 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



Quick Tip:

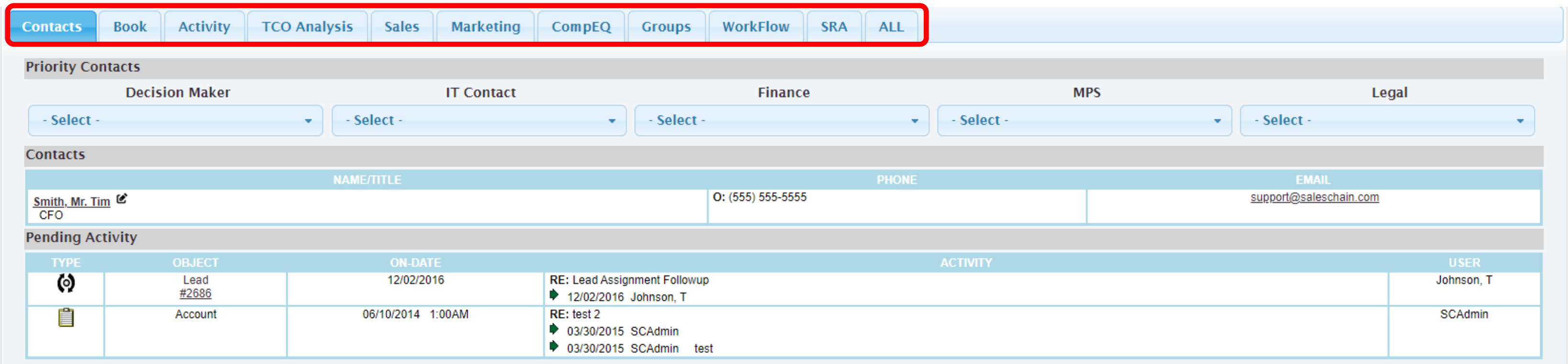
The default Account view is the Profiling View (shown above). You can change your default view via ***Menu Sidebar > User Settings > Preferences***

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.
sd	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.
66	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

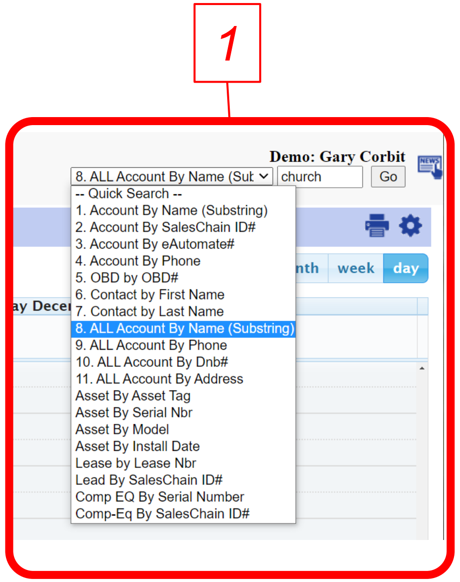
Tab	Description
Contacts	Lists contacts for the account.
Book	Lists assets, agreements, and leases, for this account.
Activity	Lists emails, notes, tasks, appointments, and documents (attached and generated) for the account only or for all associated records.
TCO Analysis	TCO is short for total cost 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 *competitive equipment.*
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 *sales rep assignment.*
All	Lists all items in the tabs.

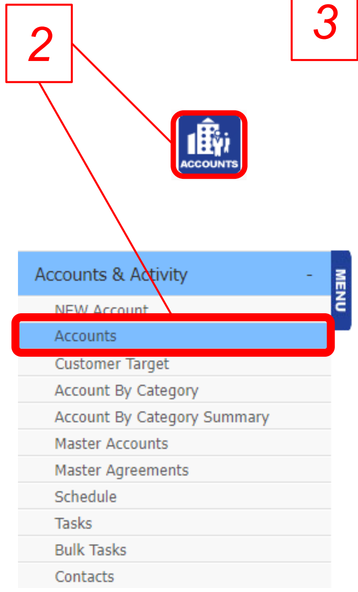


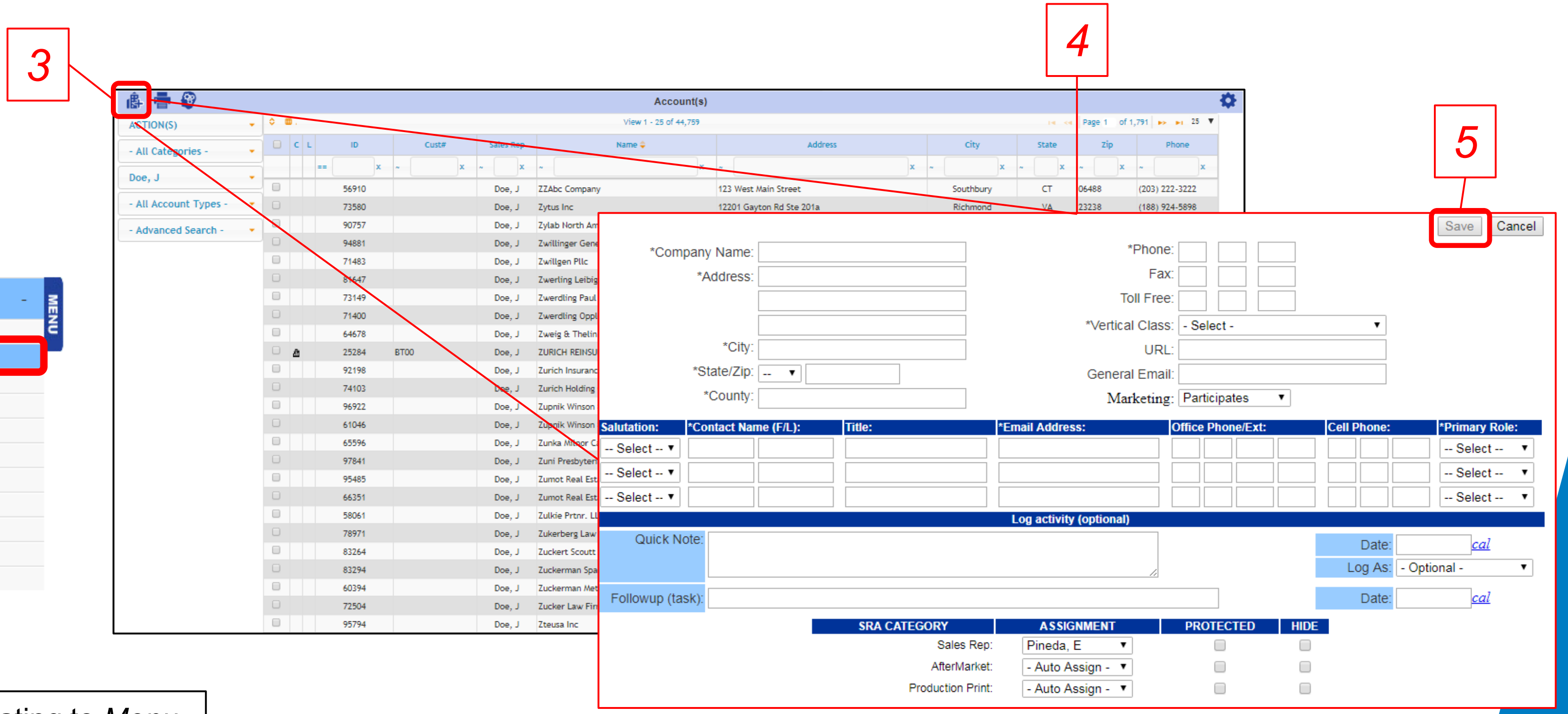
How To: Create a New Account

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 > Accounts*
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"







Quick Tip:

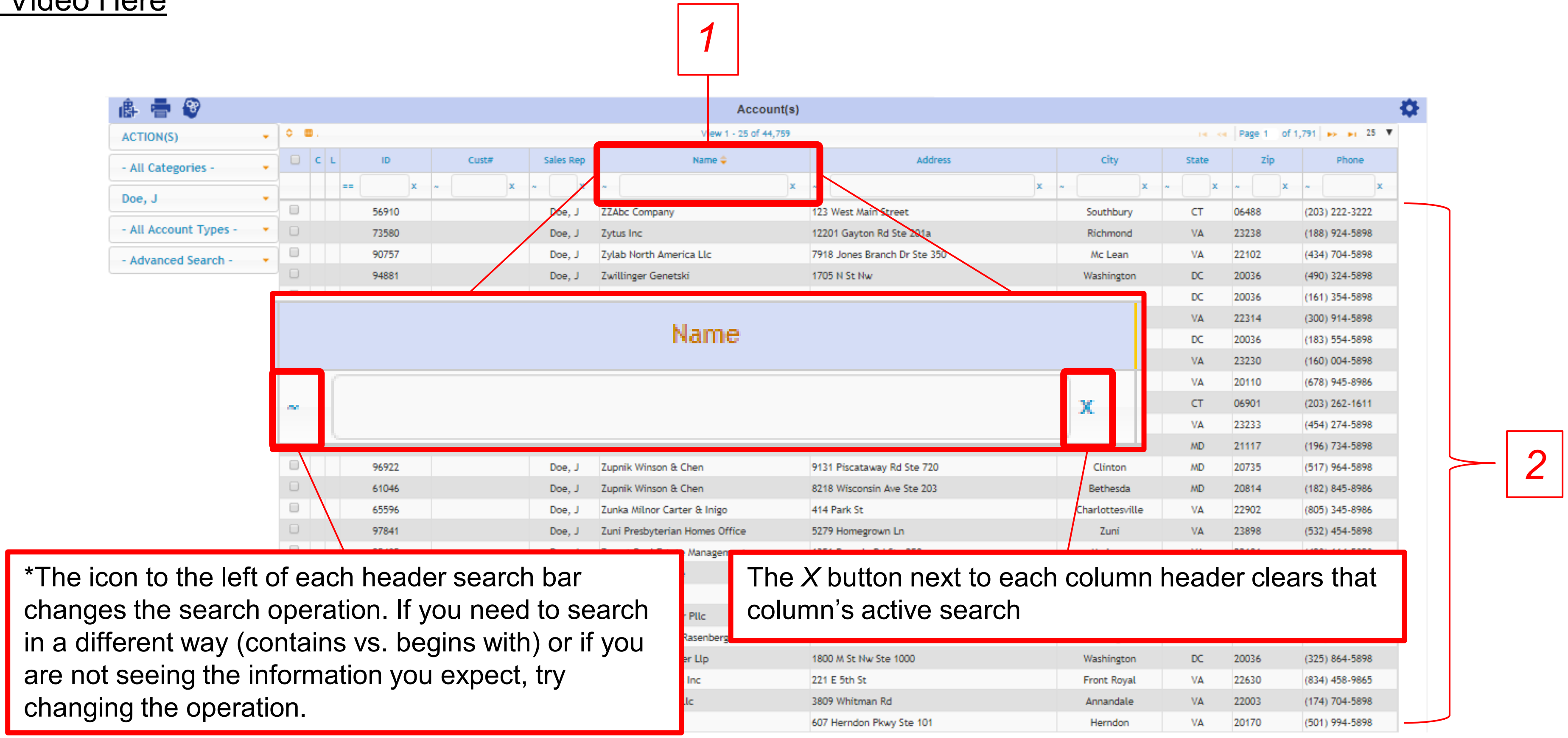
You can also create a new account by navigating to *Menu Sidebar > Accounts and Activity > NEW account*

How To: Search For an Account With the Column Headers

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. 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



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 24 - 30.

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Account(s)

ACTION(S)

- All Categories -

Doe, J

- All Account Types -

- Advanced Search -

View 1 - 25 of 44,759

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

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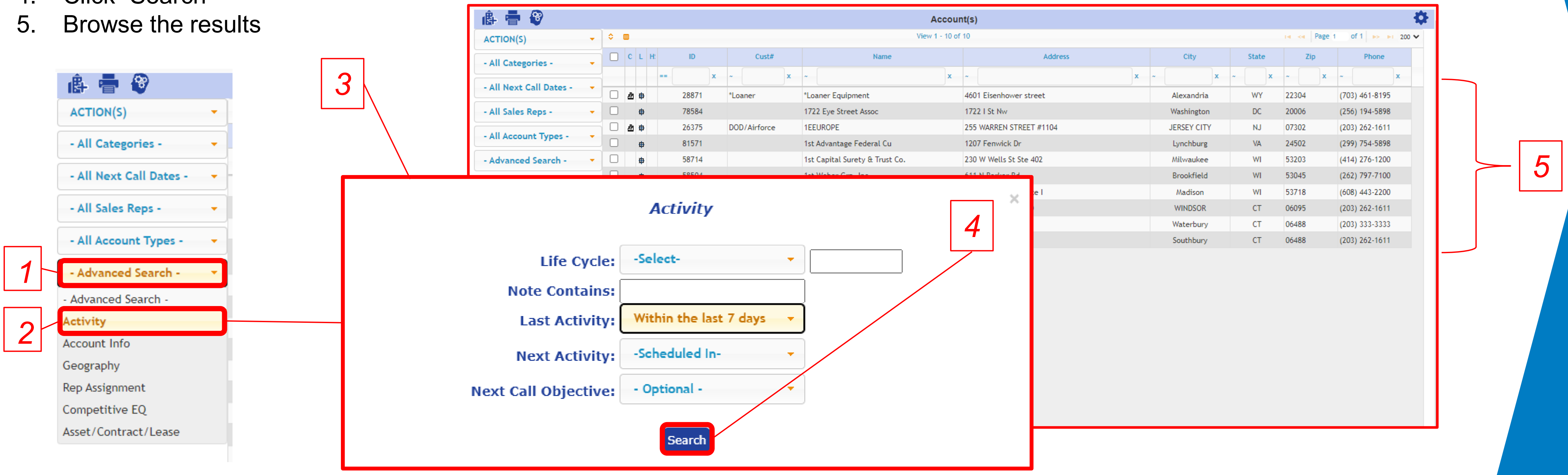
Quick Tip:

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

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.

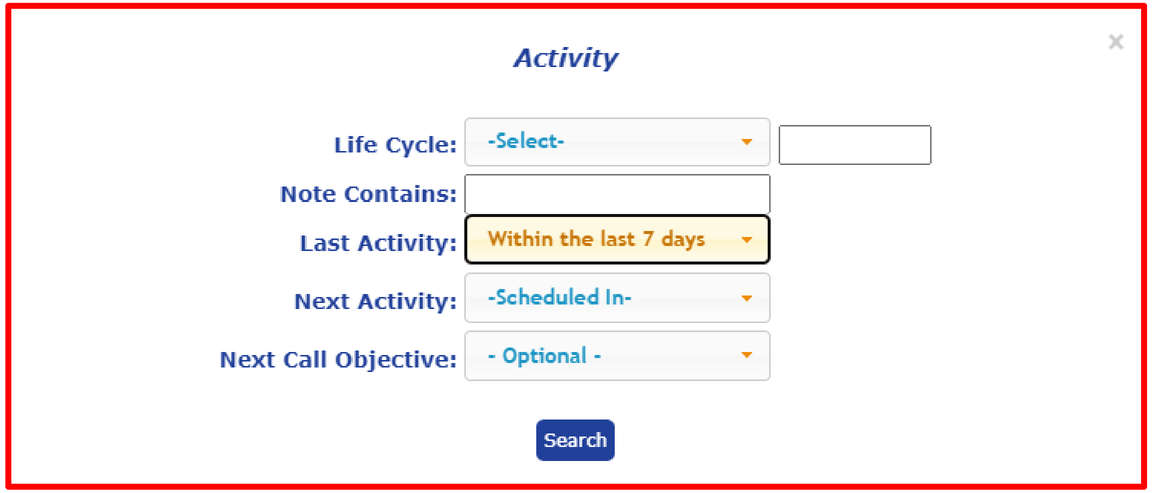
1. Click on the advanced search drop down
2. Select the category of criteria you would like to search by, account activity in this example. See pages 25 - 30 for more detailed criteria information
3. Enter your desired search in the pop-up window
4. Click "Search"
5. Browse the results



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

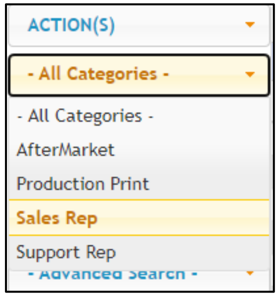


Note: These are the default fields. Additional fields may appear in this pop up depending on your system configuration.

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.

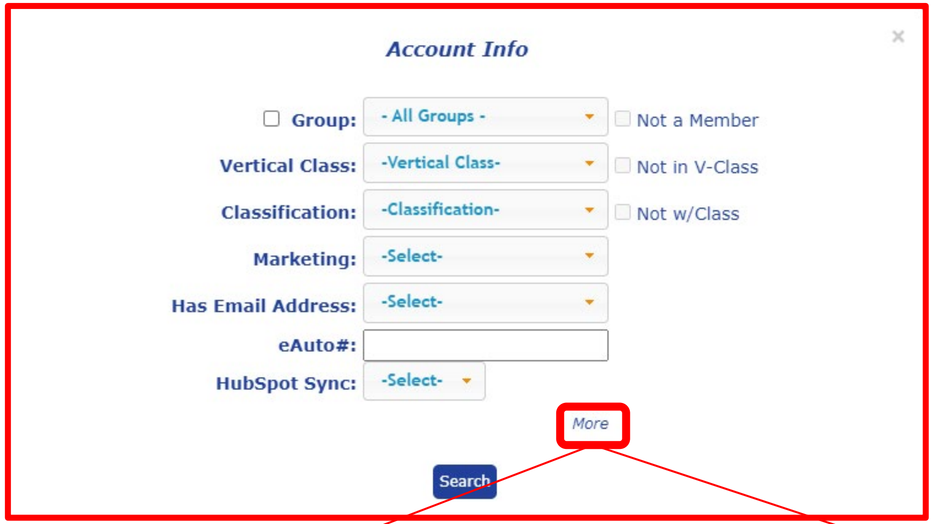


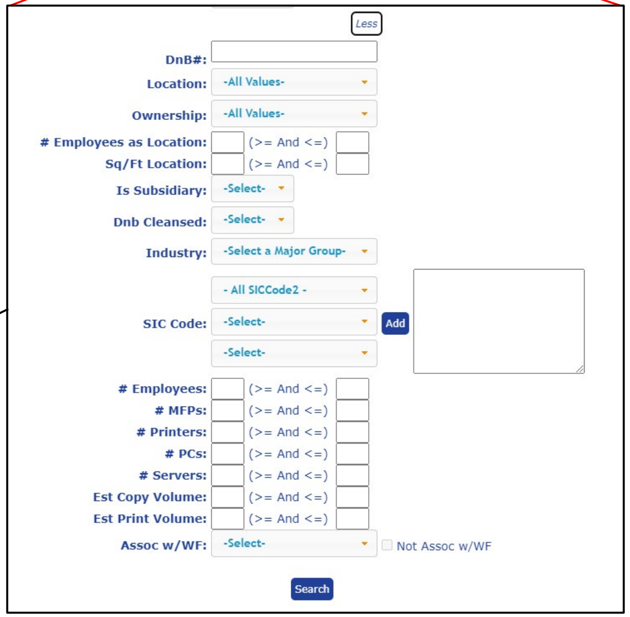
Advanced Account Searching: *Account Info*

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:

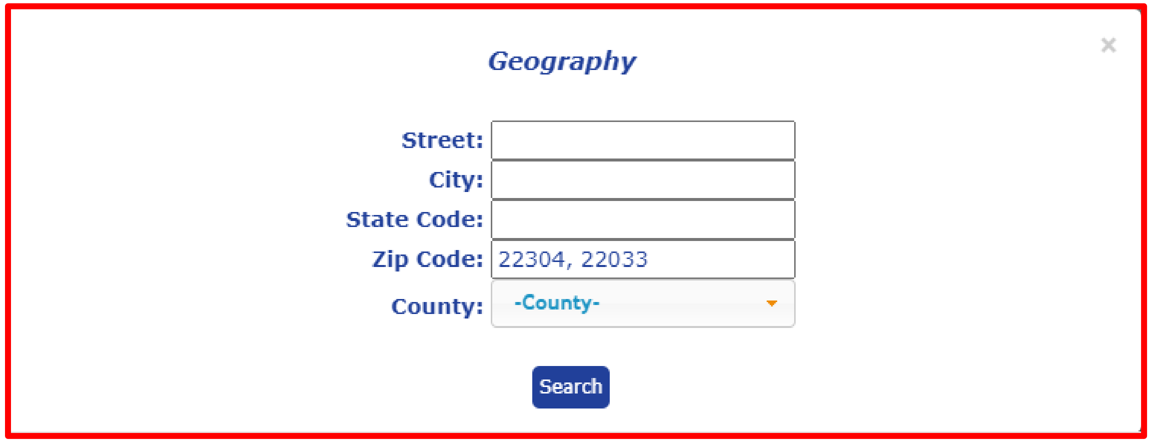
Click *More* to expand the *Account Info* advanced search and search for more detailed marketing information which may have come in from EDA data leads, manual entry, or elsewhere including revenue, number of employees and more.

Advanced Account Searching: *Geography*

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.



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.

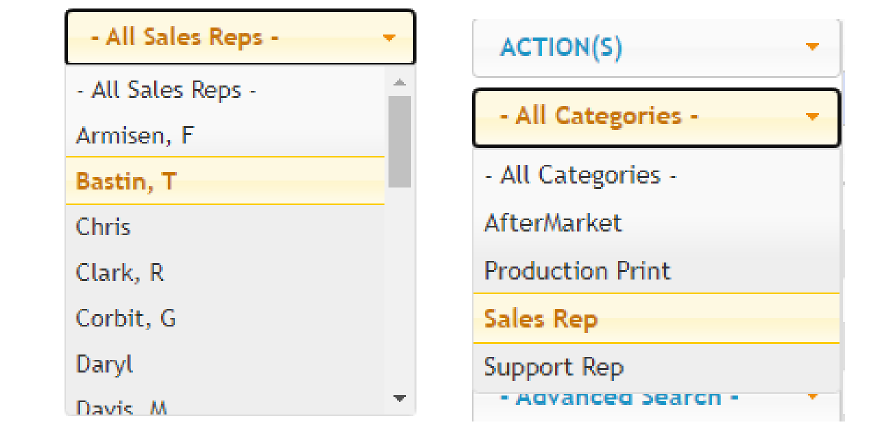
Advanced Account Searching: *Rep Assignment*

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.

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



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 23 for more information and the images to the right for reference.

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.

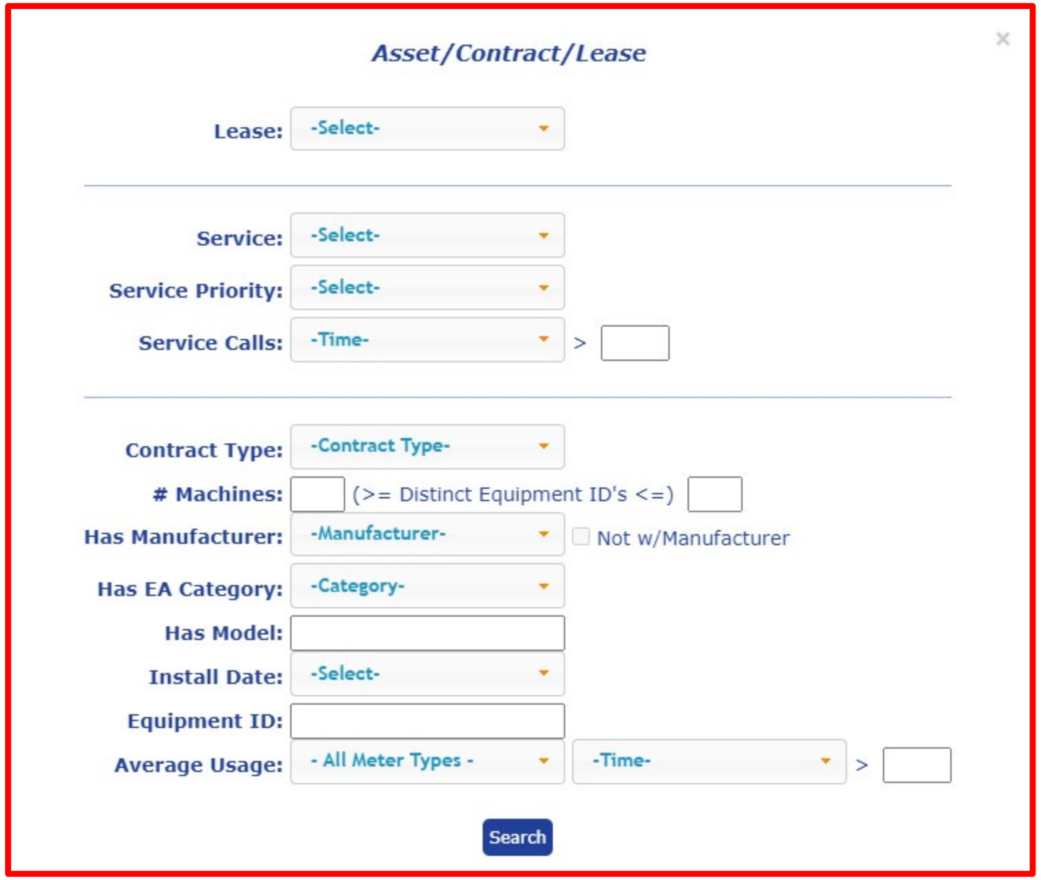
Note: These are the default fields. Additional fields may appear in this pop up depending on your system configuration.

Quick Tip:
For a comprehensive view of competitive equipment records themselves, try the Comp Eq Desk. See page 74

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.
- Equipment ID: This field can be used to query for certain equipment IDs.
- *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.



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

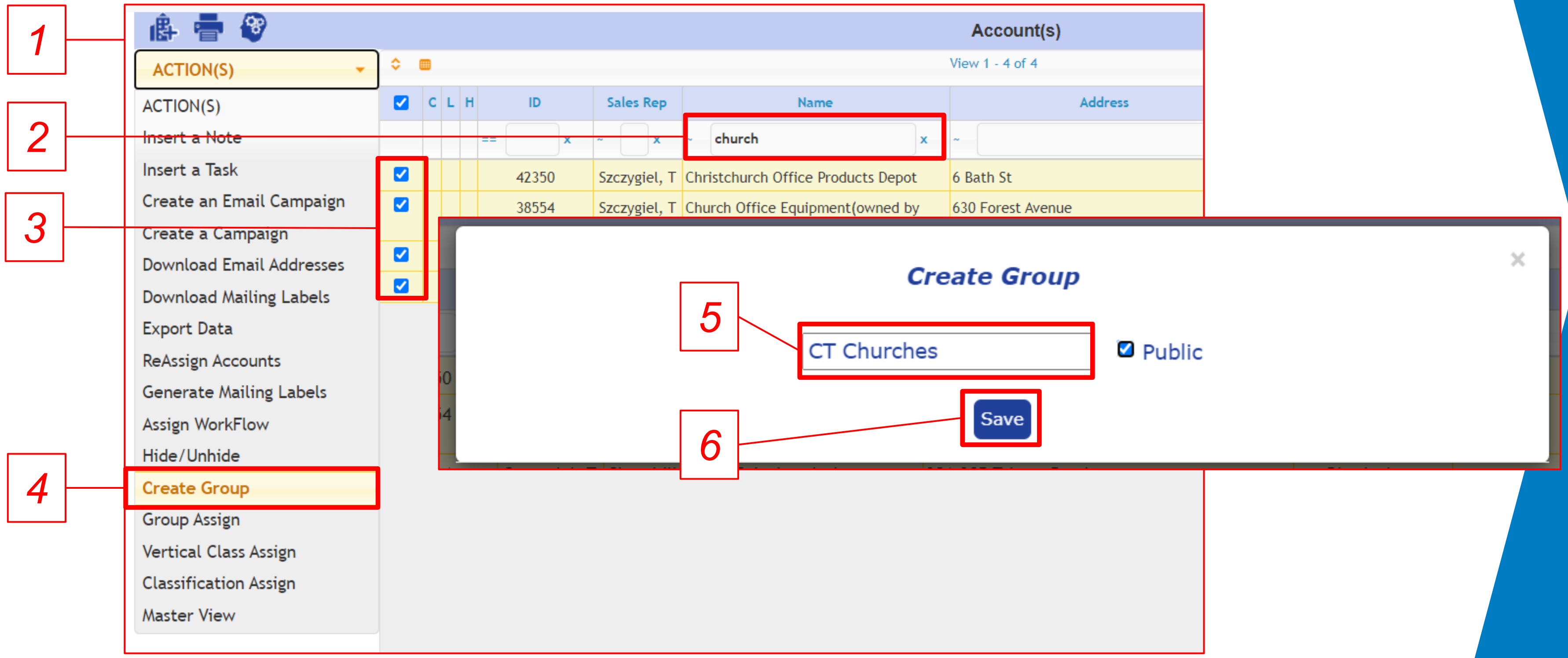
How To: Create a Group of Accounts

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*



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.

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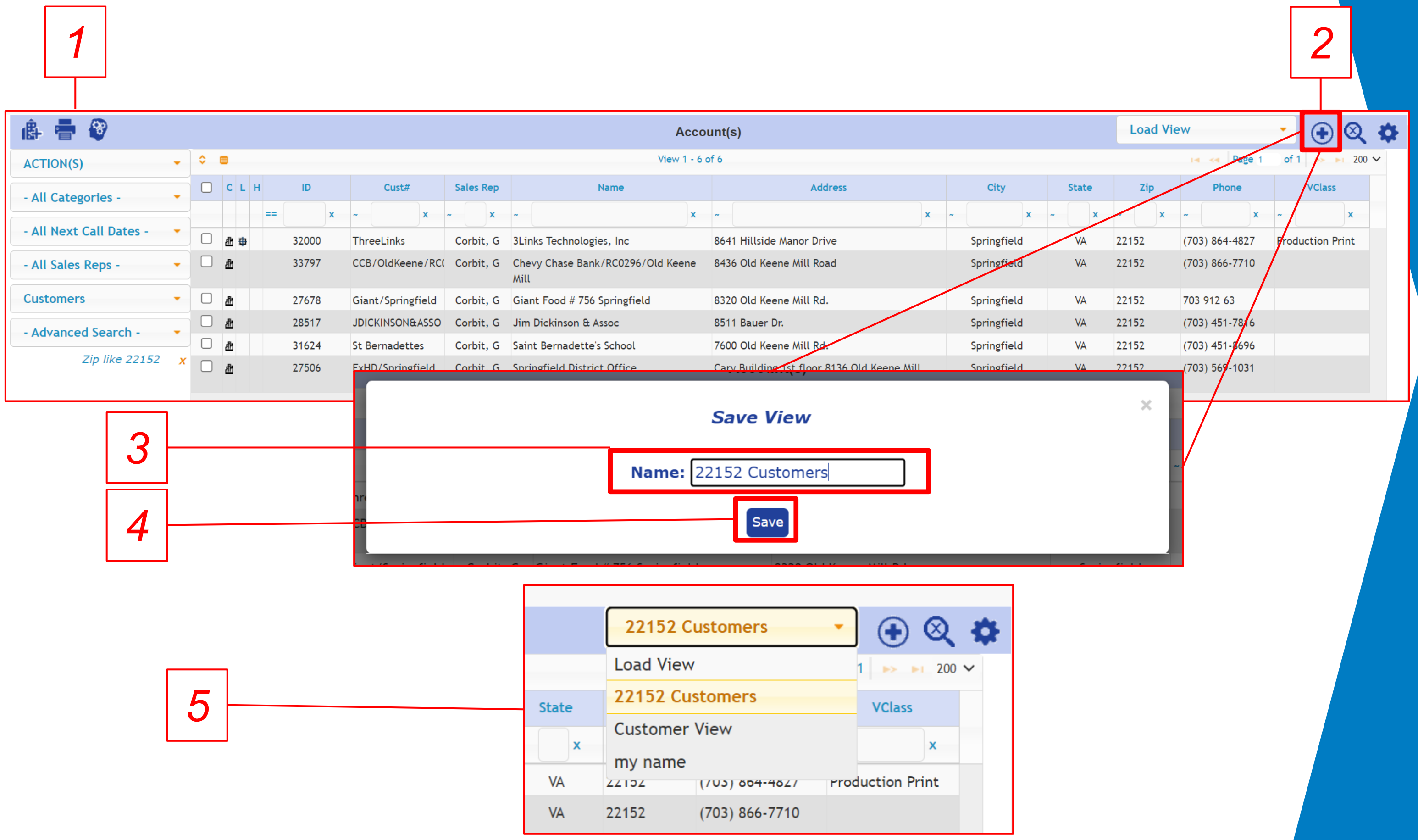
How To: Create Saved Views

In order to avoid entering the same information repetitively, you may save a search you have completed within many SalesChain desks as a saved view.



To create saved views:

1. Perform the search you would like to return to. *(In this example, Customers in a certain zip code)*
2. Click on the + icon in the upper right-hand side of the toolbar
3. In the pop-up dialogue, enter a name for this saved view
4. Click *Save*
5. The saved view will now appear in the drop-down at the top right, next to the plus icon. You may return to this view at any time by selecting it from the drop-down.

Note: The saved query icon appears in the following screens: the accounts desk, the forecast screen, the order desk, the delivery desk, and the lease desk.

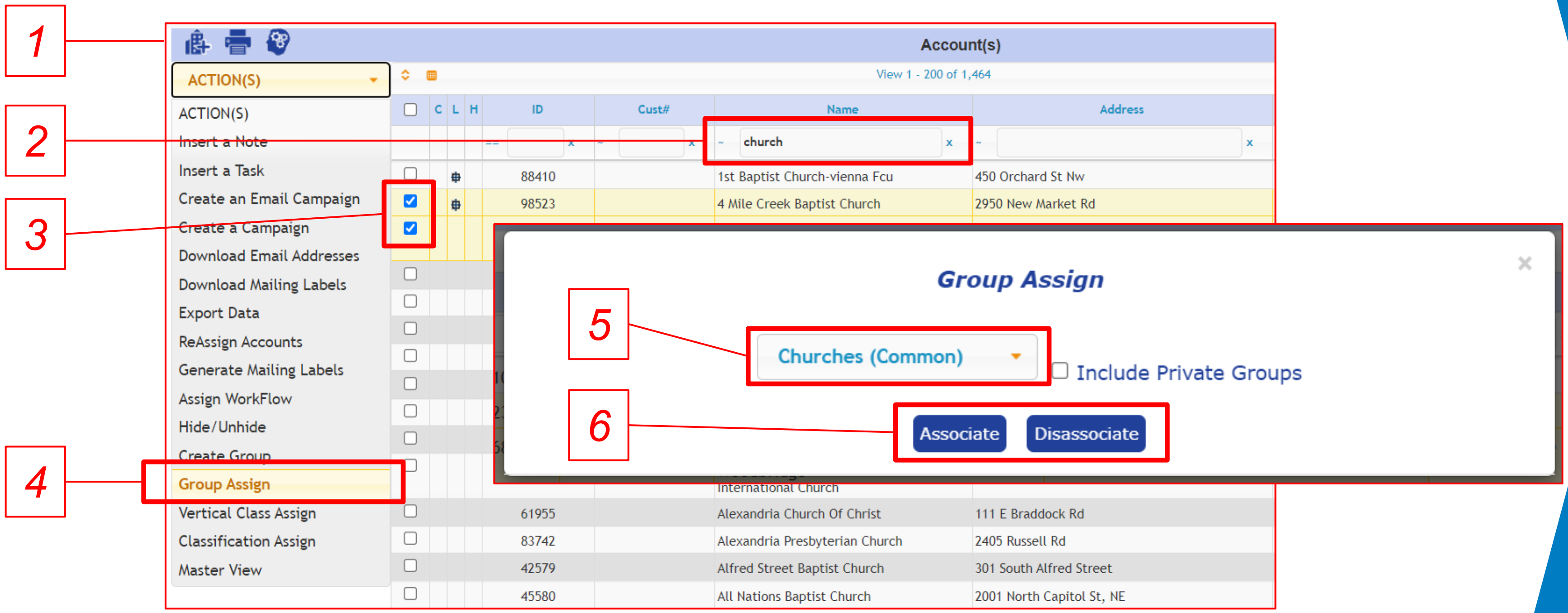
How To: Add or Remove Accounts From An Existing Group

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*



Quick Tips:

- You can also associate or disassociate an account from a group using the *groups* tab in the account view itself. See page 34
- 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.

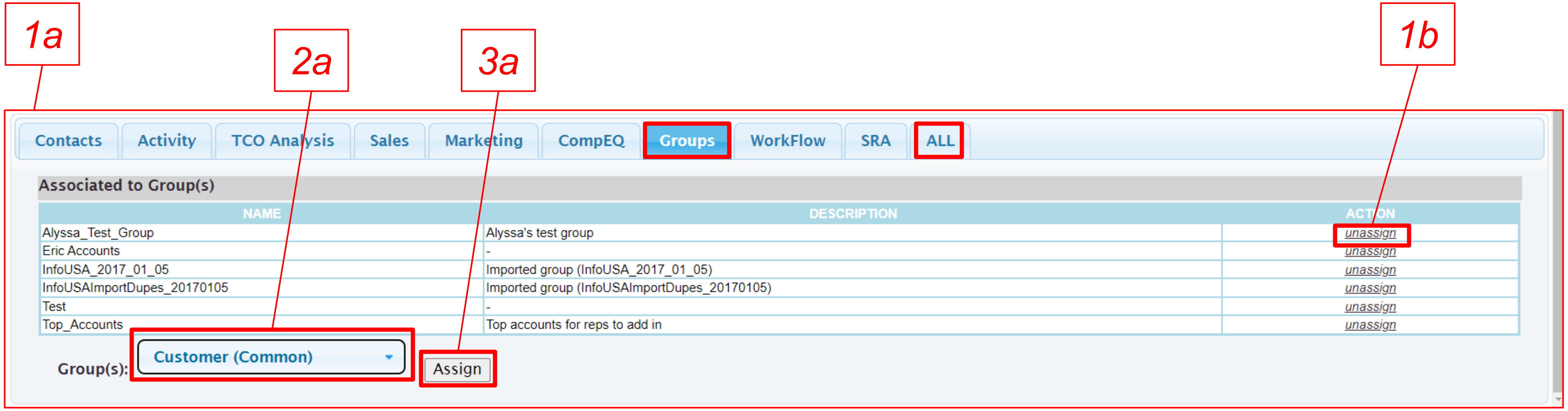
View a tutorial Video Here

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

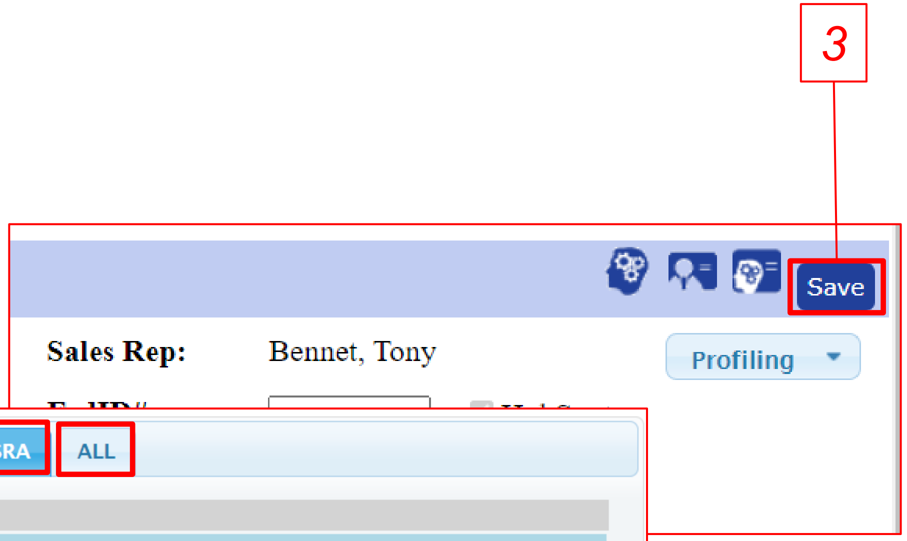


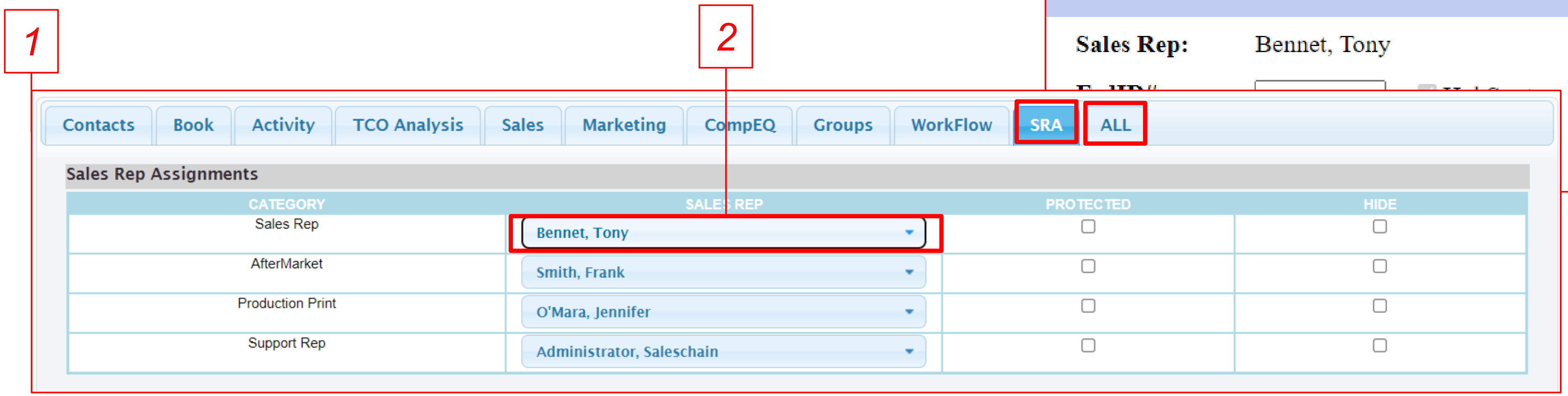
How To: Assign an Account to a Different Rep

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 assign a different sales rep 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





Quick Tip:

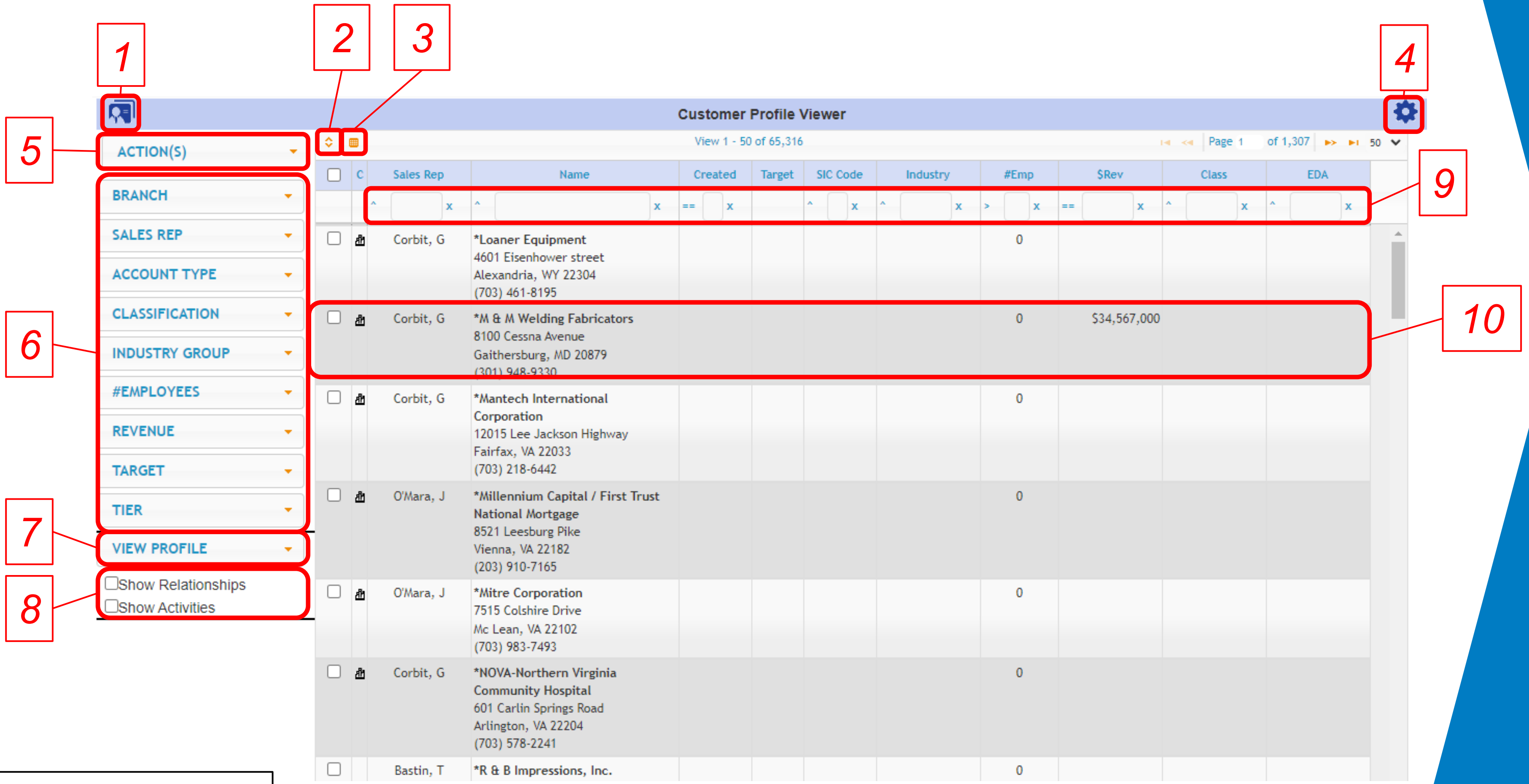
It is possible to reassign accounts to a different rep in bulk using the accounts desk. See page 59

Customer Profile Viewer

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 16)
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



Quick Tip:

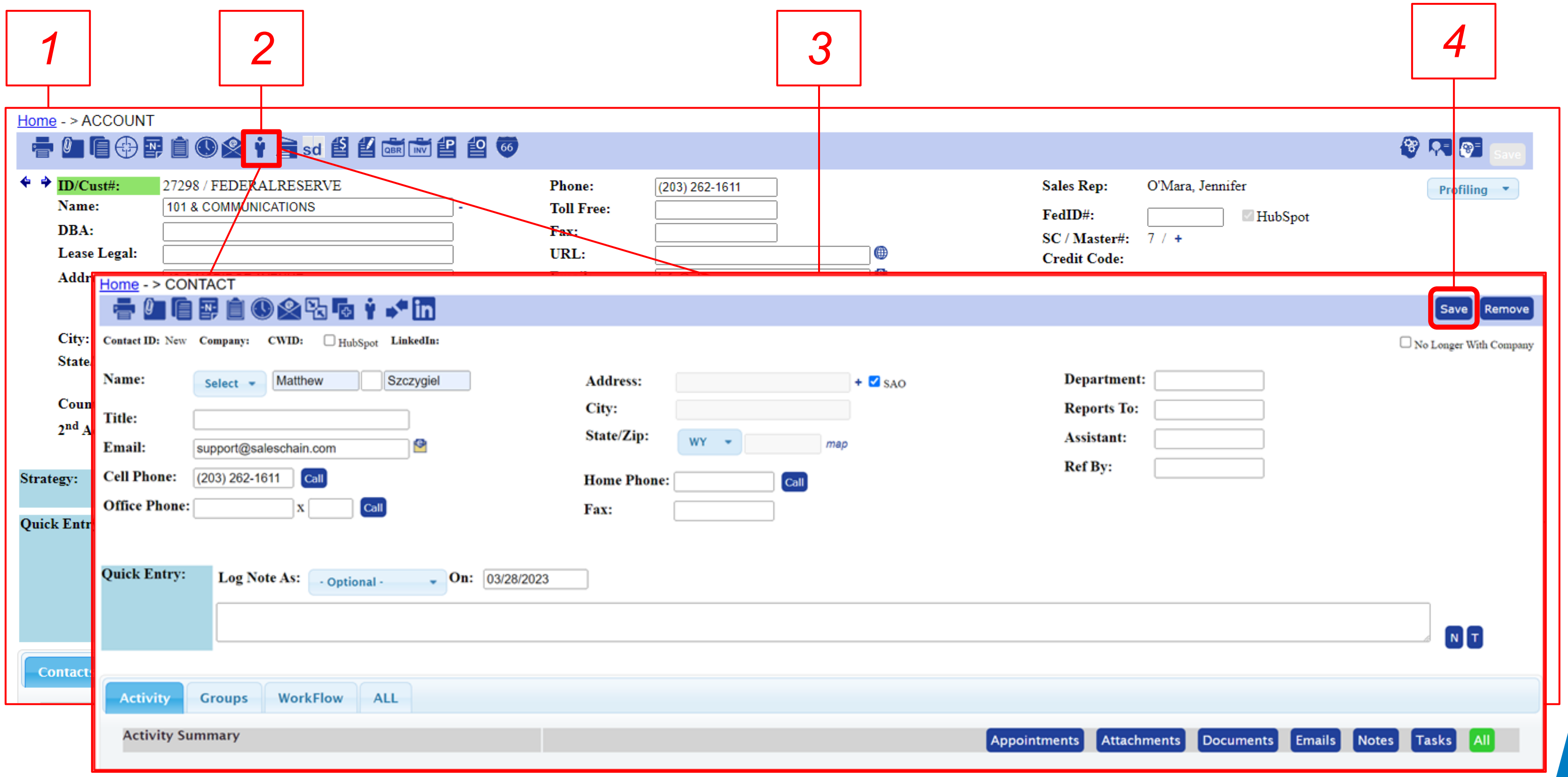
Basic searching via drop-downs and column headers is performed in the same manner as the account desk. See pages 22 and 23 for instructions.

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*



Quick Tip:

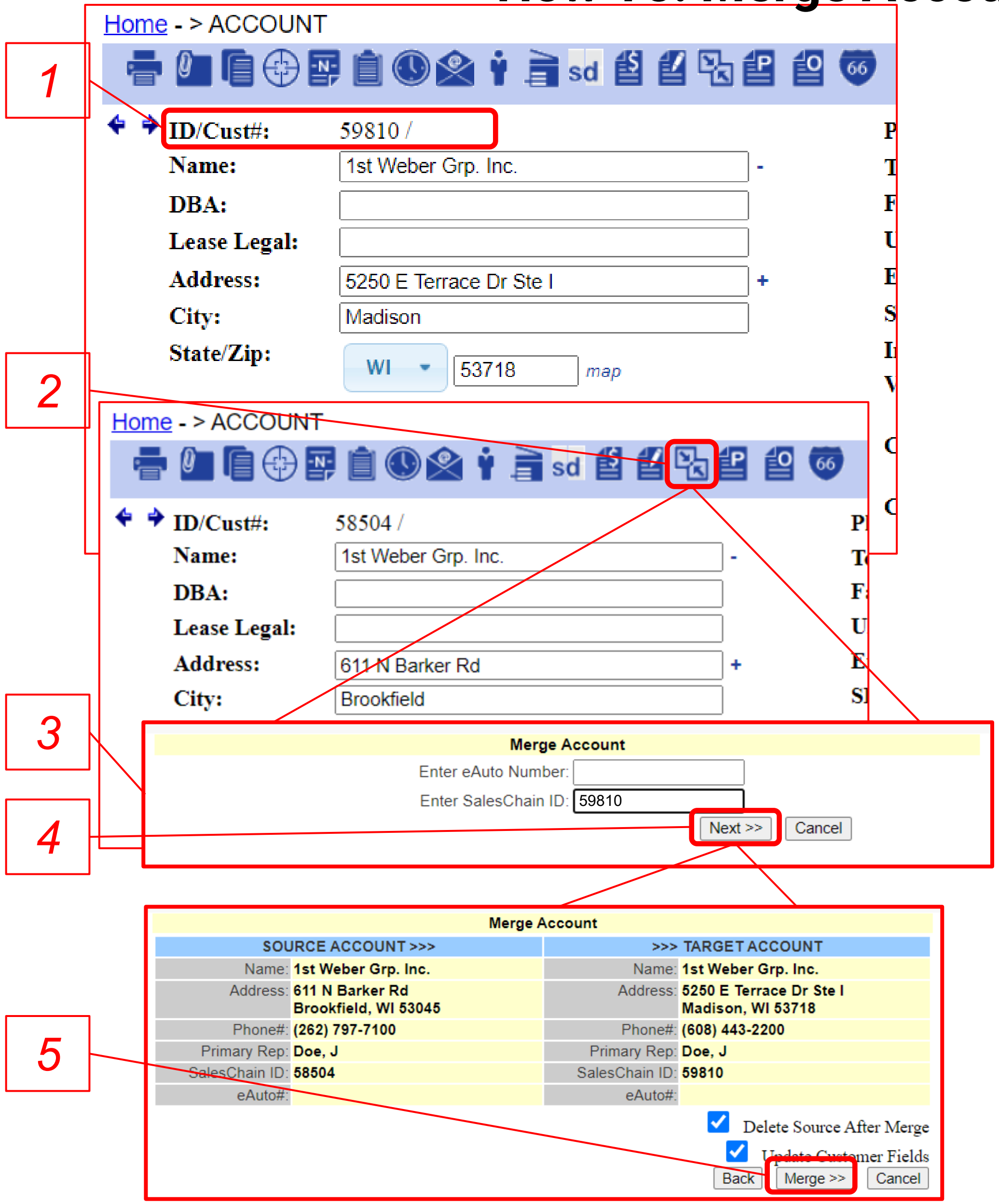
SAO is short for *Same Address as Office*. When checked, this makes the contact's address the same as the account to which they are associated. If you prefer to enter a different address, uncheck the *SAO* box.

How To: Merge Accounts

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 35.

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 >>*



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.

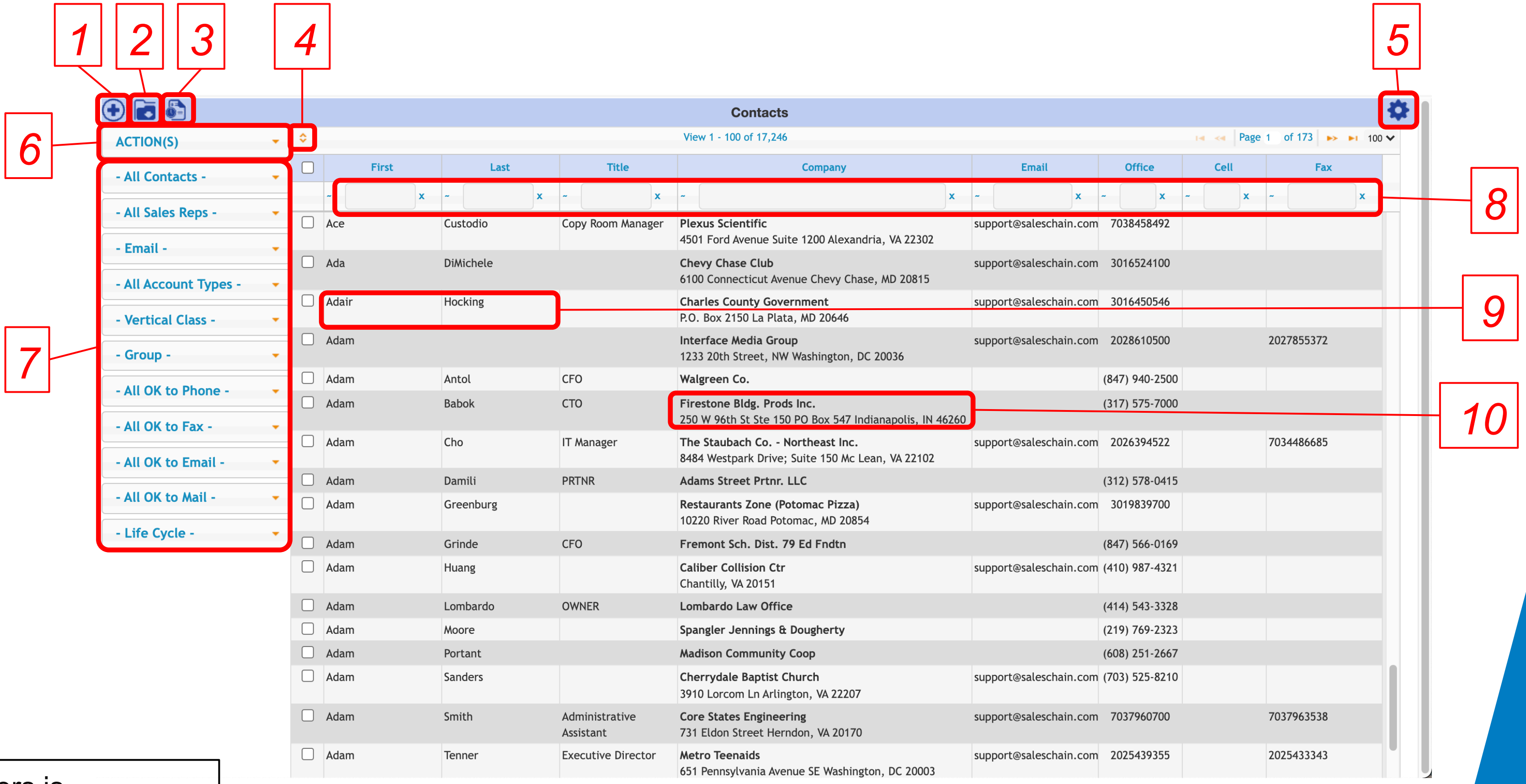
Contacts Desk

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 42)
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 40)
10) Click on any account to view its details. (see page 18)



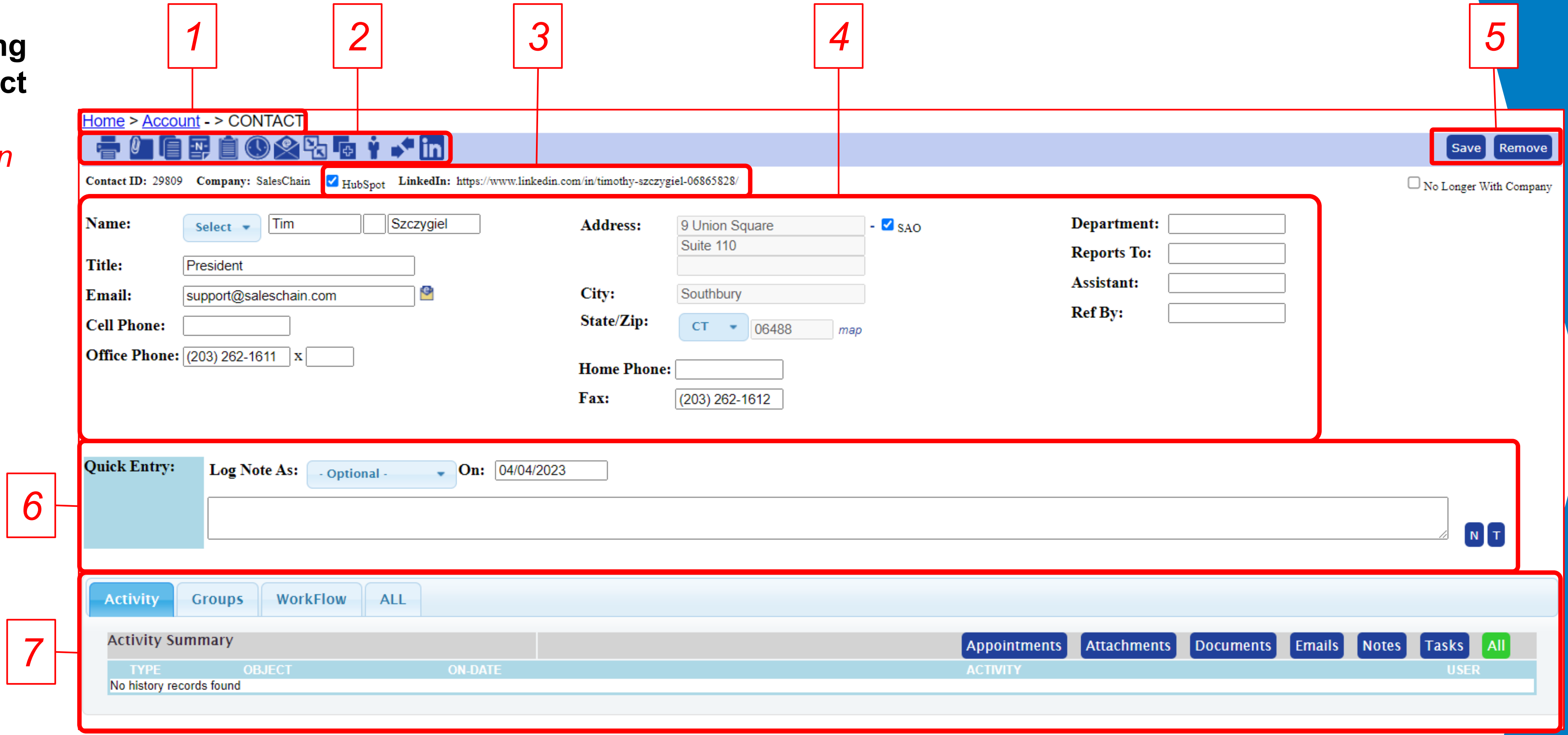
Quick Tip:

Basic searching via drop-downs and column headers is performed in the same manner as the account desk. See pages 31 and 32 for instructions.

Contact View

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

*[*See Page 41 for more information regarding the icons in the contact view.*]*



Key:

1) Navigation tree
2) Action and Activity Icons
3) HubSpot and LinkedIn Sync indicators and links
4) General contact information
5) Save and Remove Buttons
6) Quick entry dialogue
7) Action and activity history

Action Icons in the Contact View

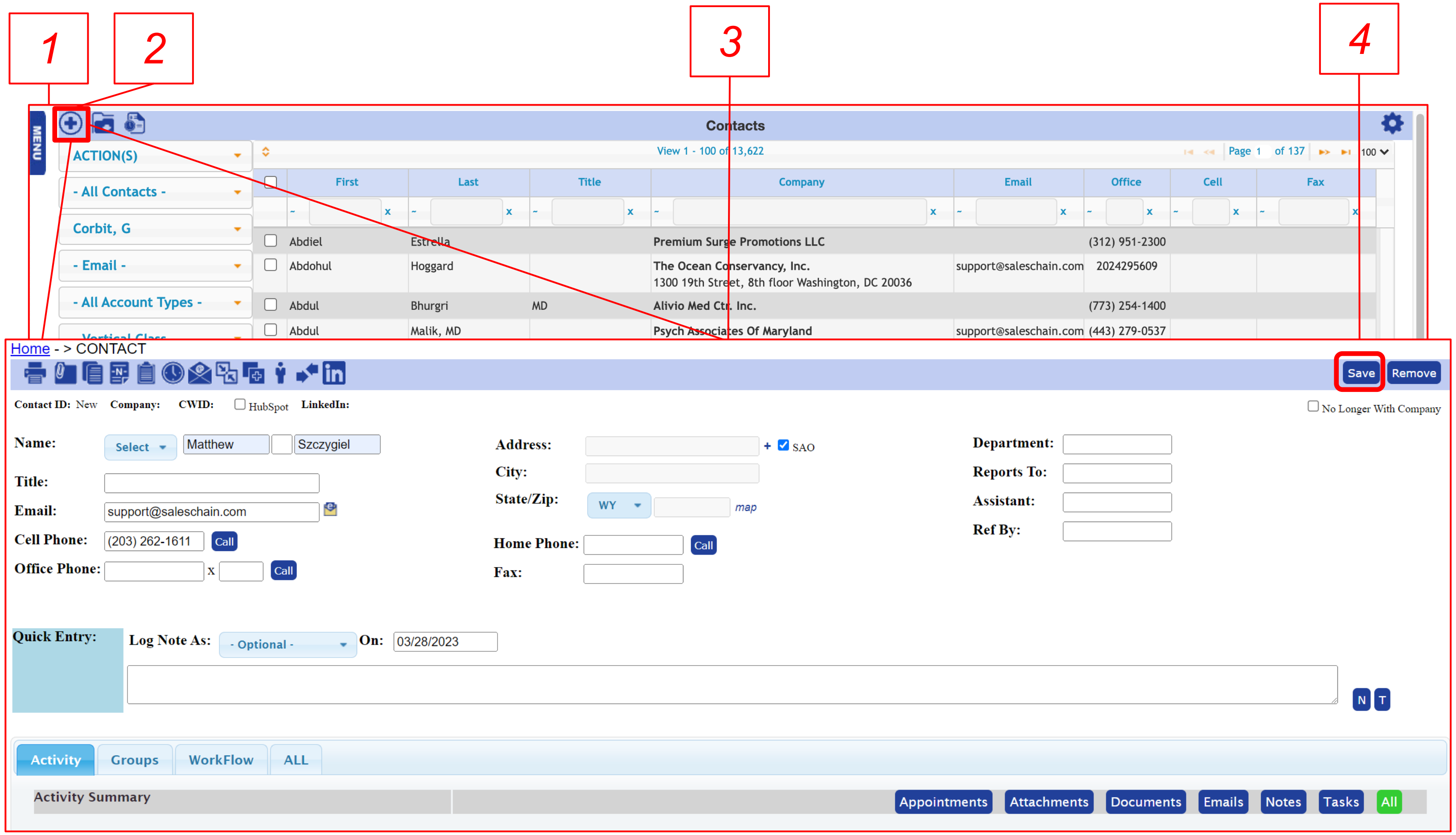
Icon	Associated Action
	Print this contact's Information
	Clone this contact
	Add or go to this contact's LinkedIn page (right click to edit)
	Attach a document to this contact
	Generate a document for this contact
	Add a new note to this contact
	Add a task to this contact
	Schedule an appointment with 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*



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.

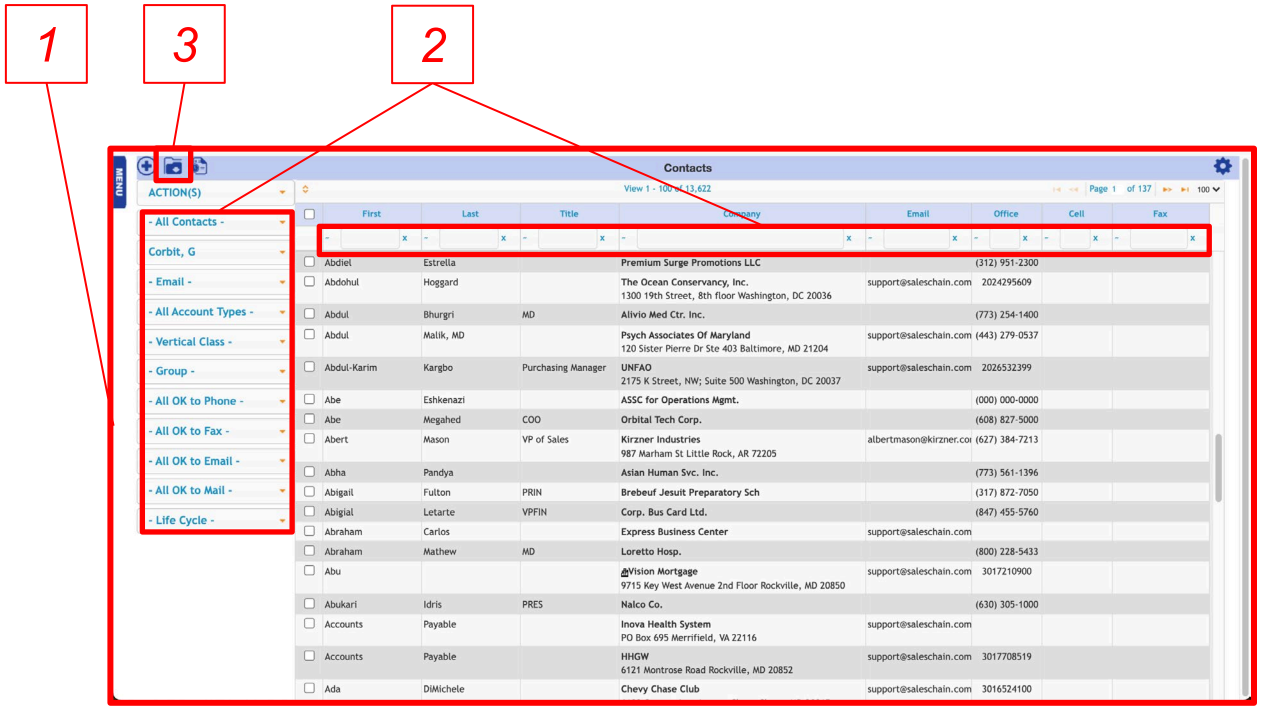
NOTE: This action is only permission pending, and only available to users who have been provided with the permission to export data.

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 



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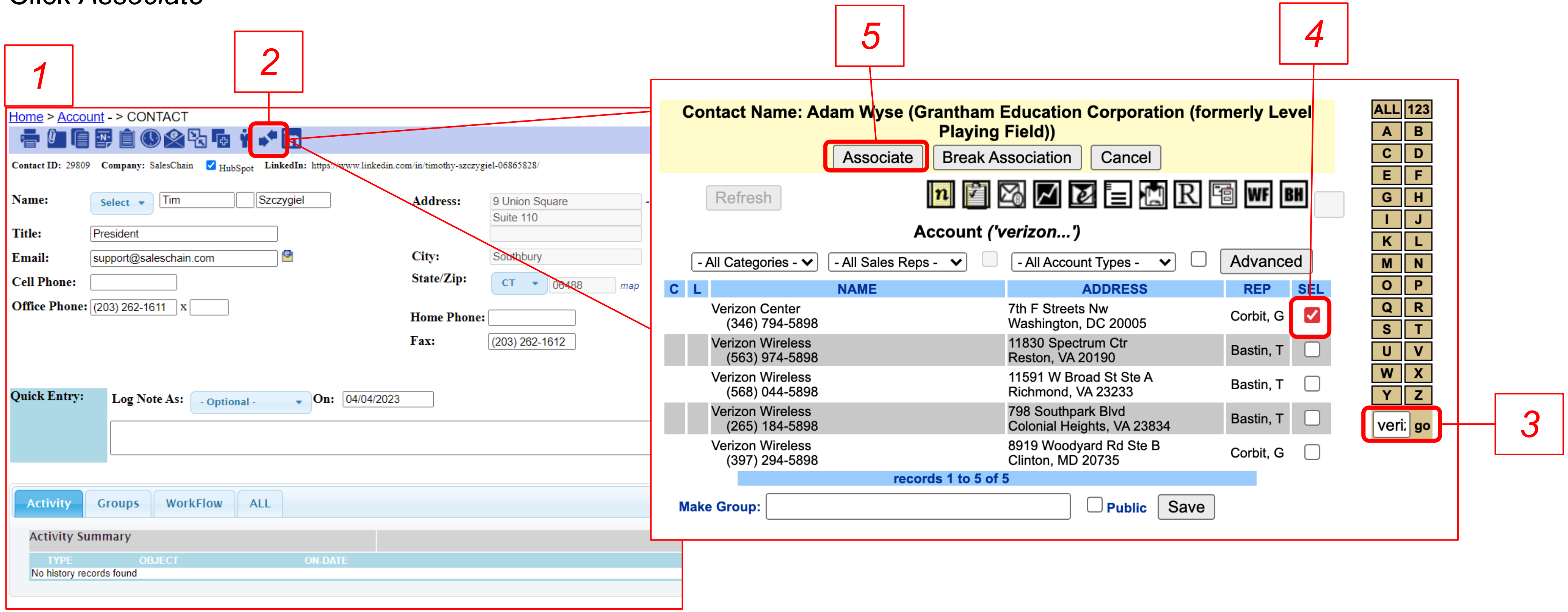
How To: Move a Contact From One Account to Another

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*

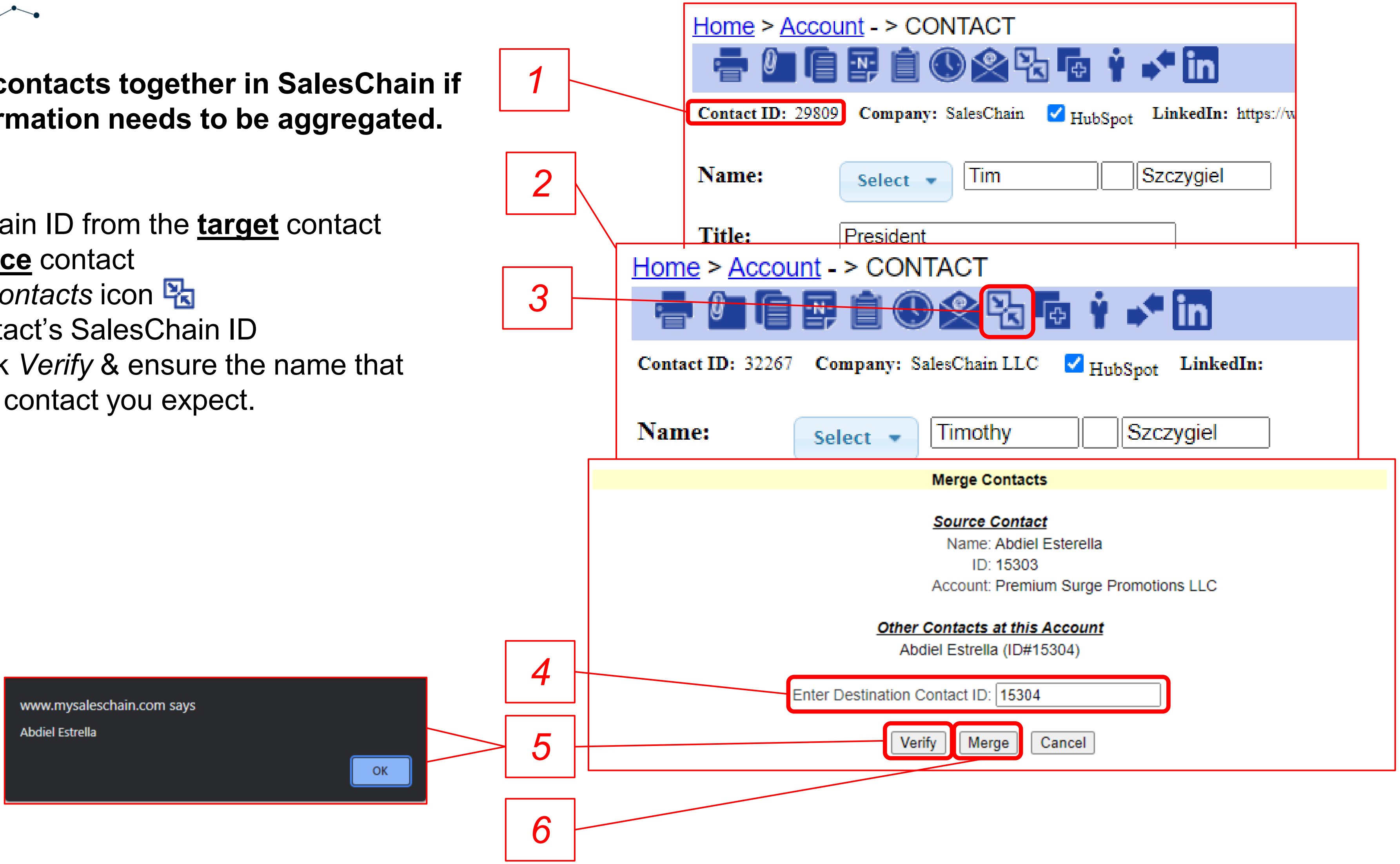


How To: Merge Contacts

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*



3

Actions, Activities and Appointments:

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

Schedule Desk

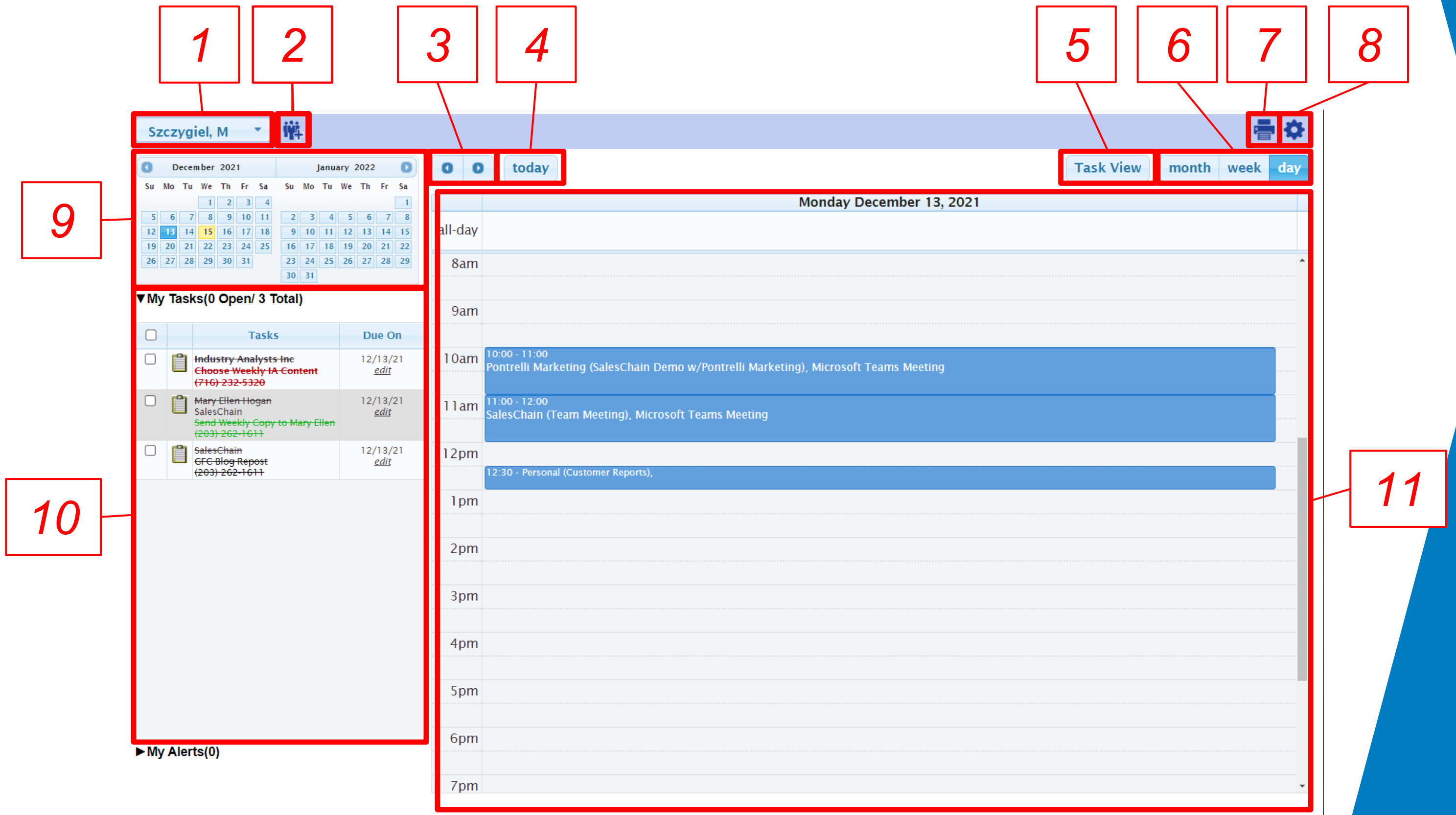
The schedule desk can be used to create, track and manage your appointments. Your schedule can sync with Microsoft Outlook 365. The schedule desk is the default screen that opens when you log into the SalesChain system.

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 49)
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 48)
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.

Schedule Desk: The Task Sidebar

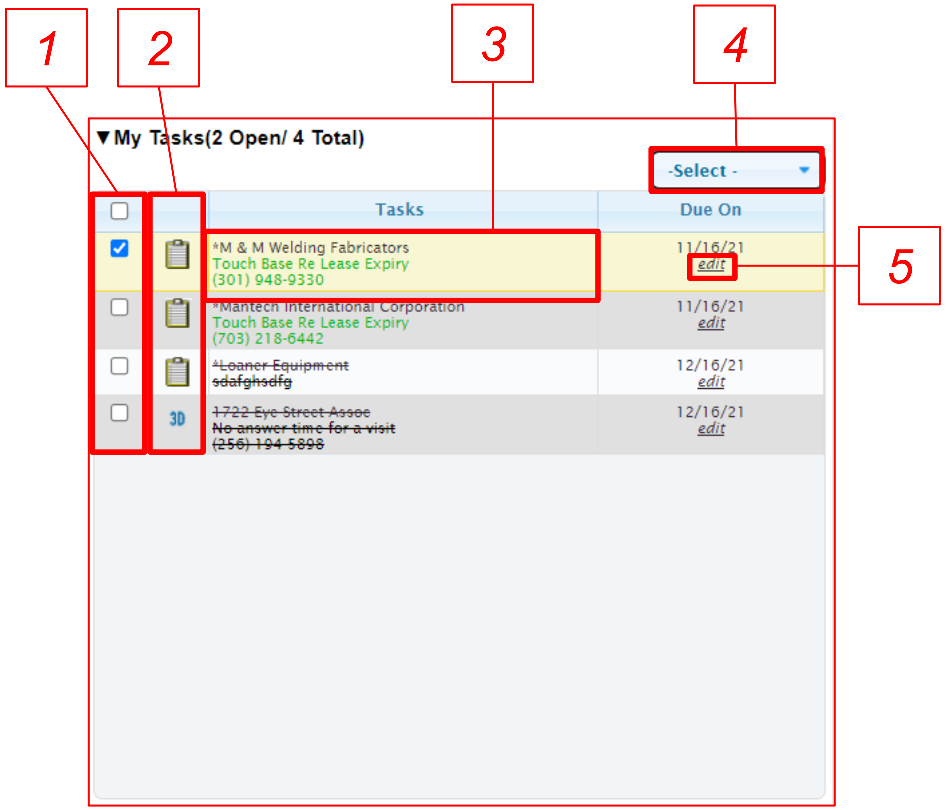
The task sidebar allows you to view, edit and act on tasks individually or in bulk right from the schedule desk.

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 60-61)
3) Task Summary. Click on the name of the associated account to be taken to its account view (See Page 18)
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.



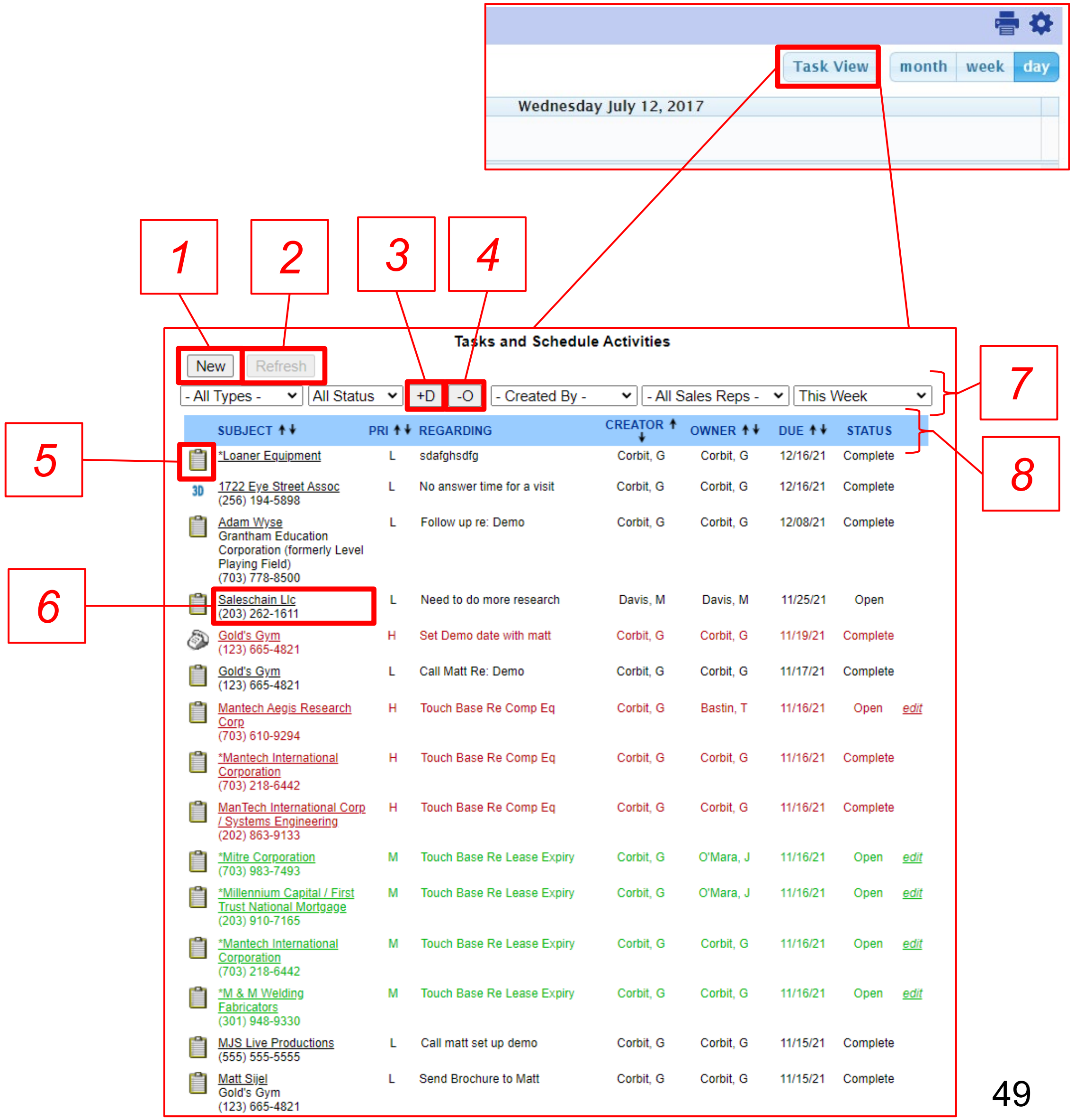
Schedule Desk: Task View

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 50 - 52)
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 18)
7) Filter the tasks displayed
8) Sort tasks by any category in the column headers using the up and down arrows.



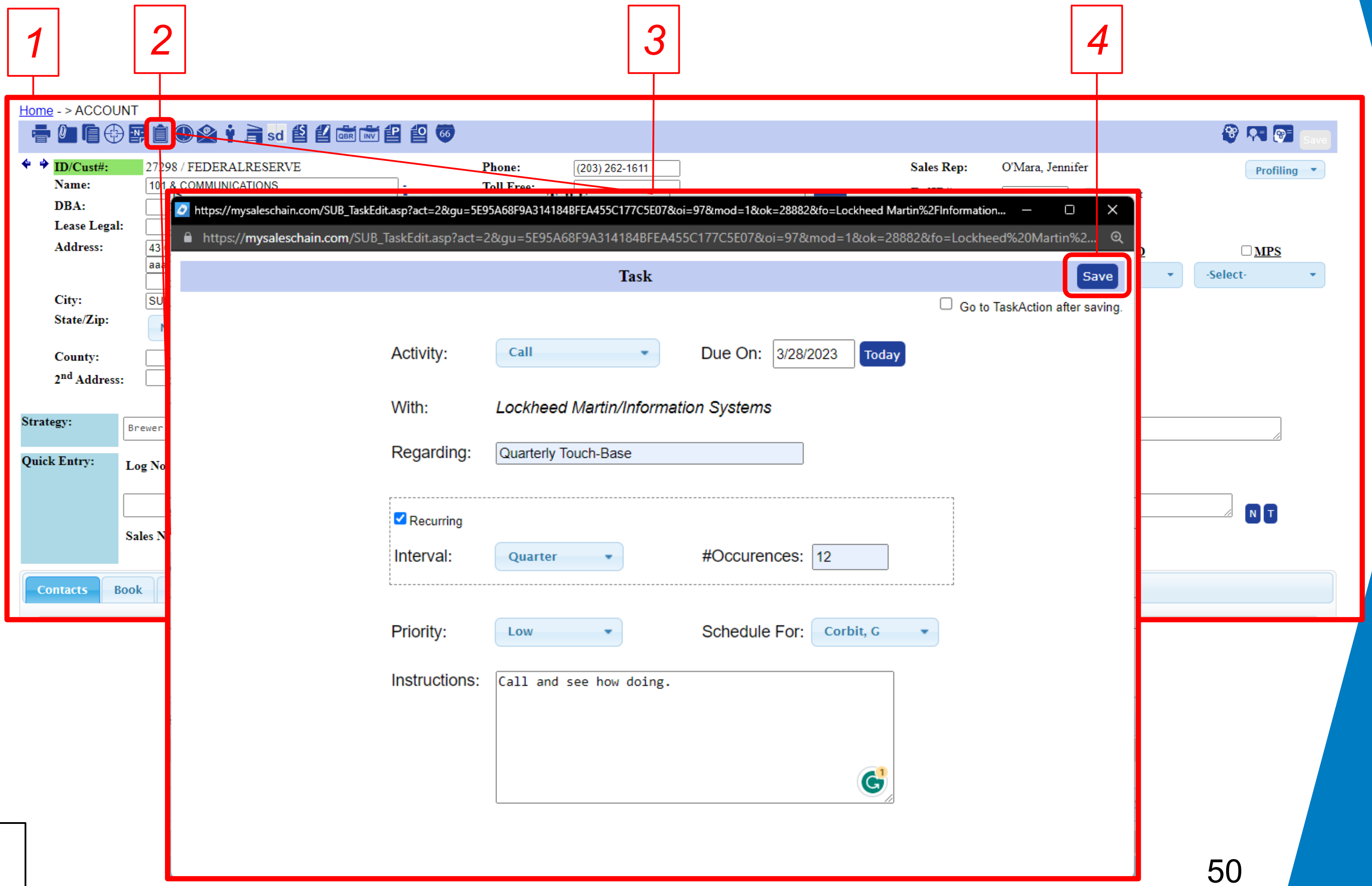
How To: Create a New Task From the Account View

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 18)
2. Click on the *new task* icon 
3. In the Pop-Up, enter task information
4. Click *Save*



Quick Tip:

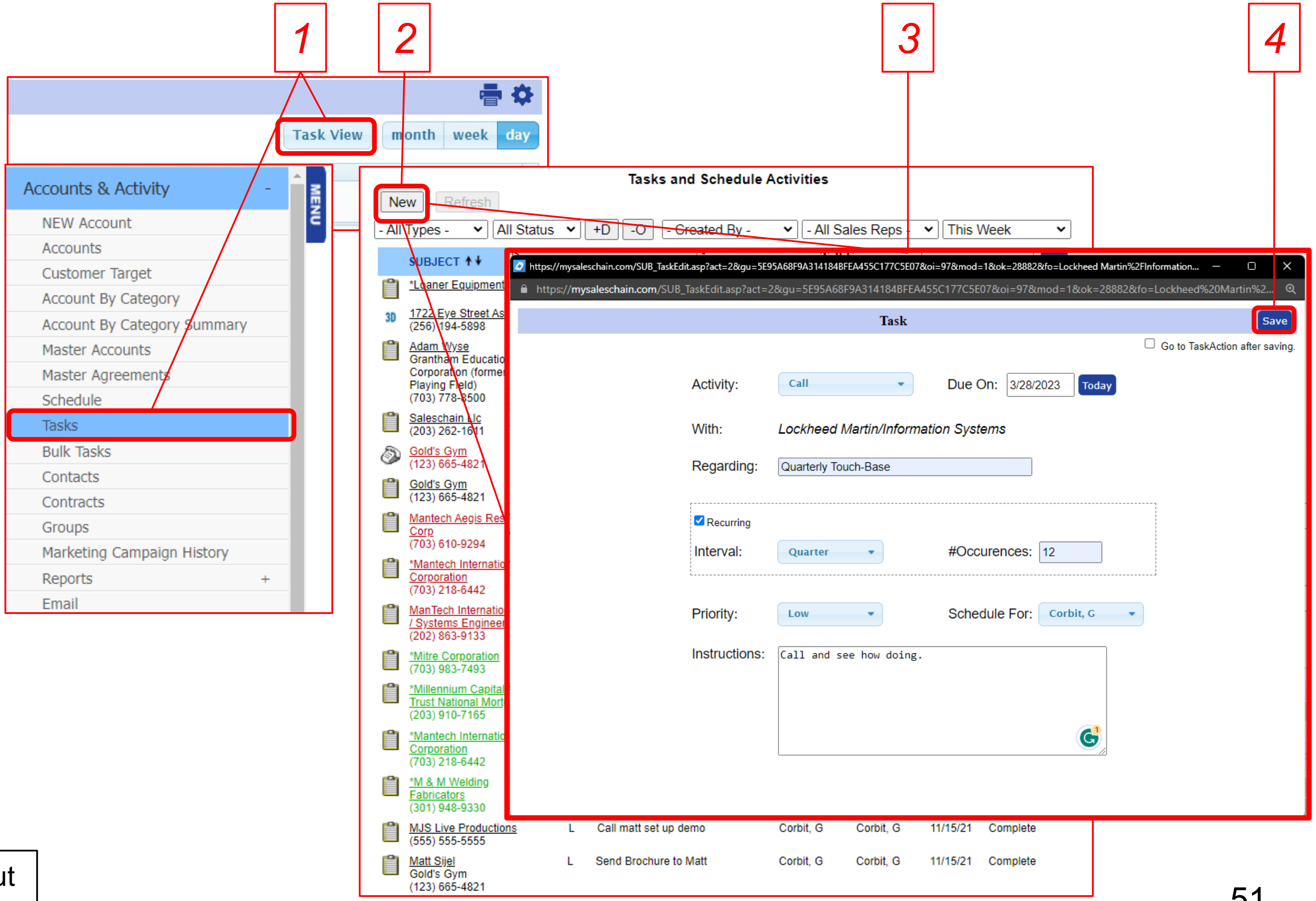
Check the box next to *Go To Task Action after saving* to jump directly to completing this task.

How To: Create a New Task From the Task View

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

To Create a Task:

1. Navigate to the task view (See Page 49)
2. Click on the *New* button
3. Enter task information
4. Click *Save*



Quick Tip:

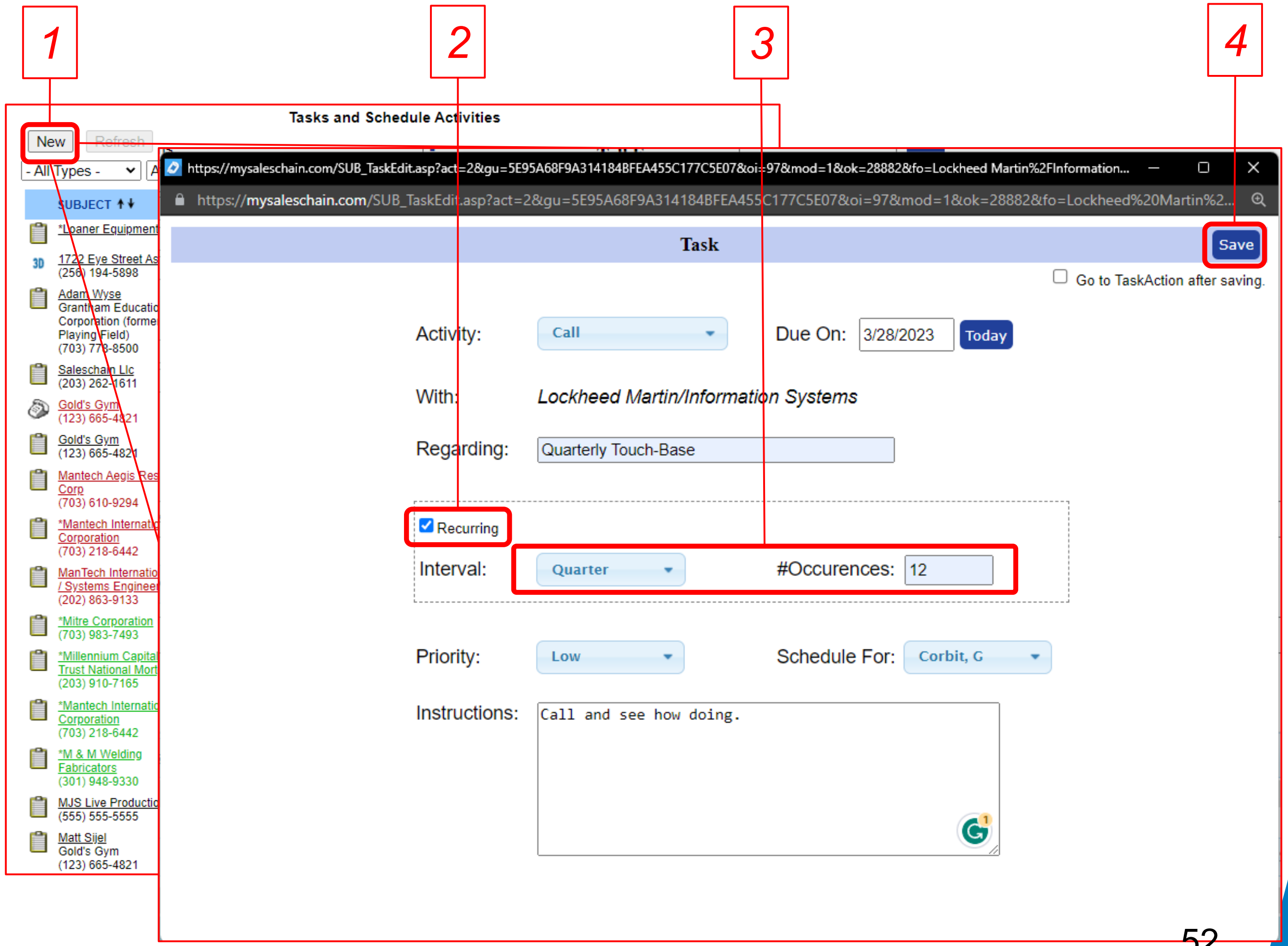
Tasks created from the task view will be created without an account association.

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:

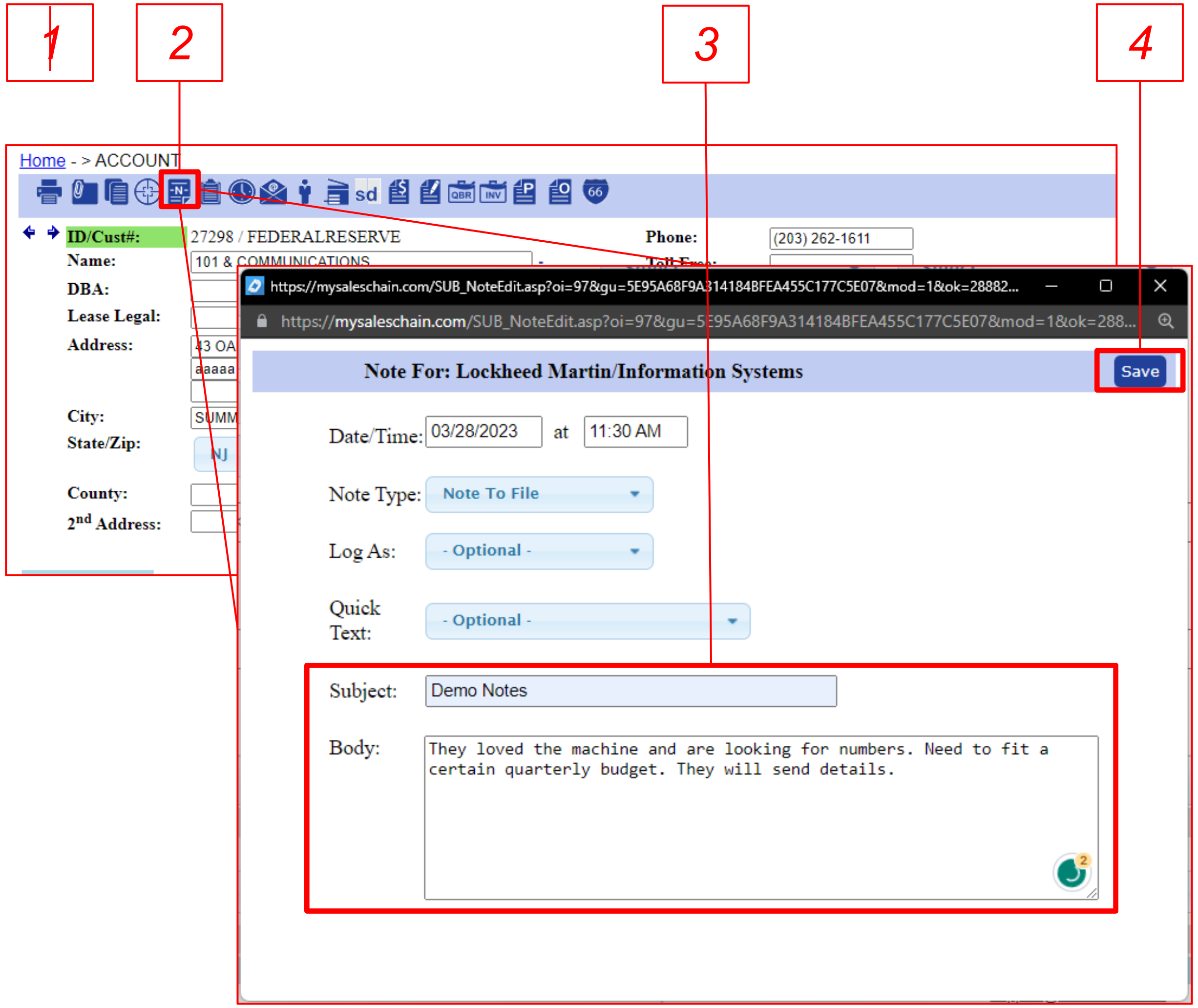
1. Begin creating a task using steps 1-3 outlined on page 50 and 51
2. Check the box next to *Recurring*
3. Select an interval of time and the number of occurrences
4. Click *Save*



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*



Quick Tip:

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

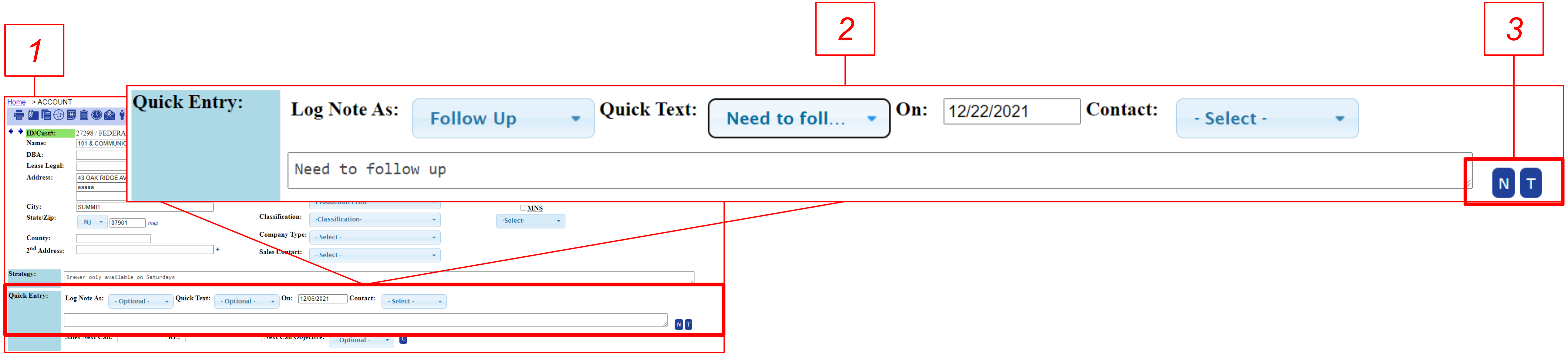
How To: Create Quick Tasks and Quick Notes

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



Quick Tip:

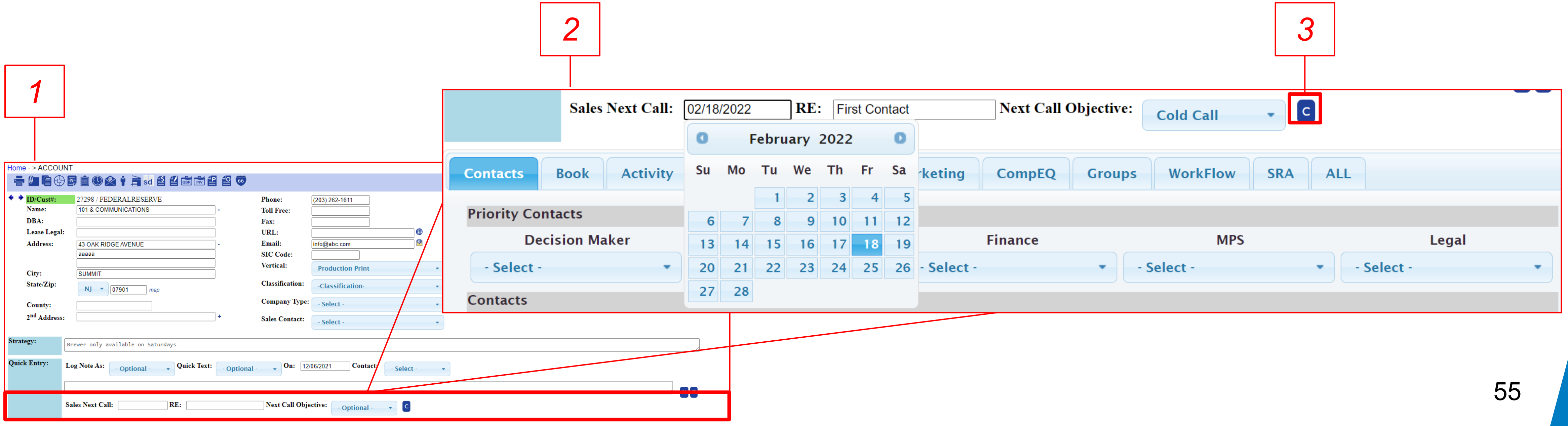
Use the *Quick Text* drop down to quickly add note or task text that is commonly used for repetitive tasks or notes.

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:

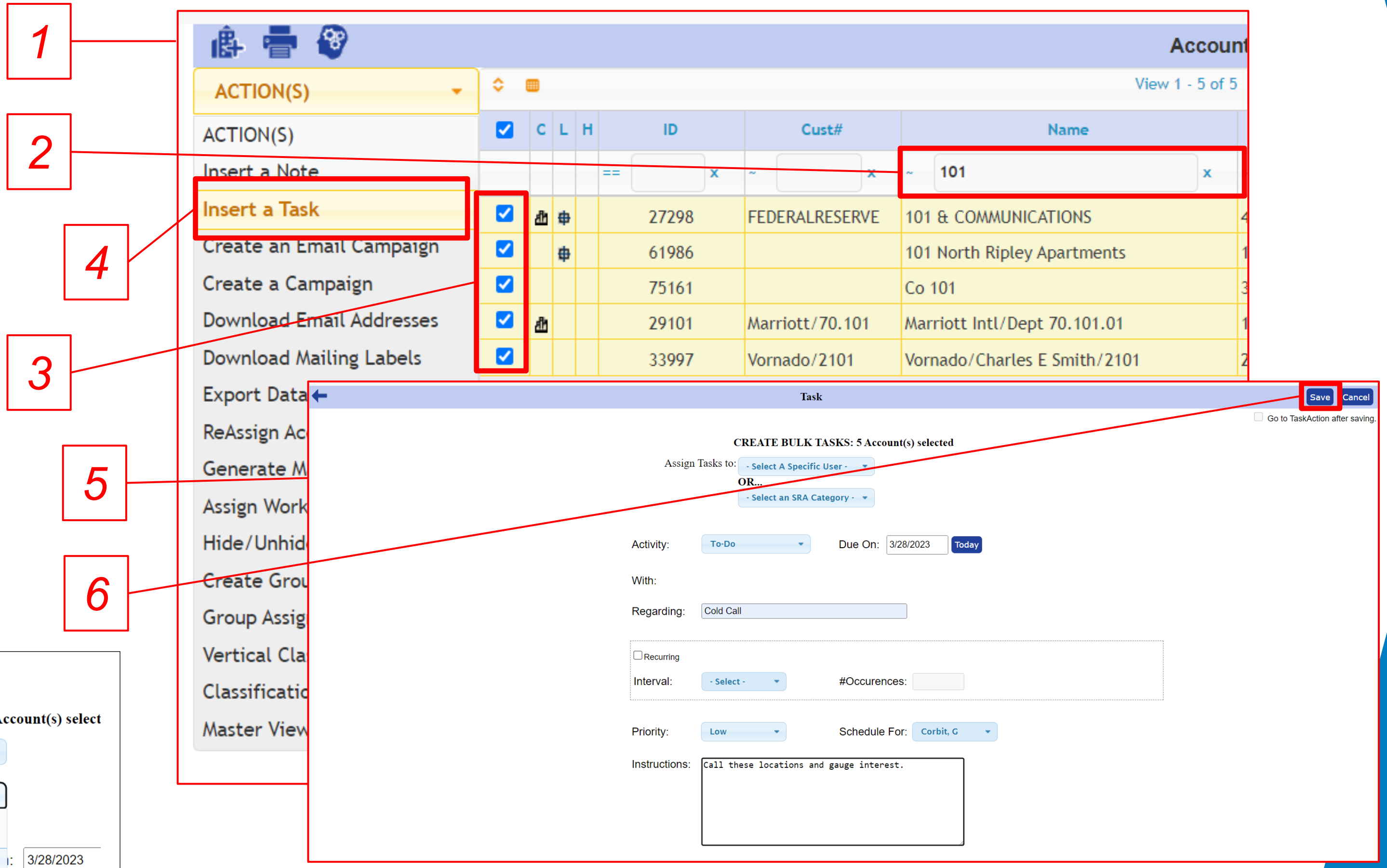
1. Navigate to the account to which you would like to add a note or task.
2. Enter the sales next call task information including a date, details in the *RE:* box, and an objective using the drop-down.
3. Click *C* to save this next call date task.



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

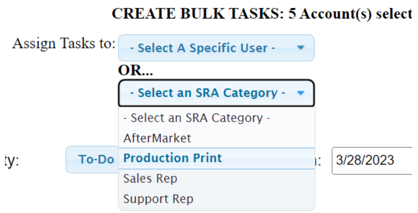
To add tasks in bulk:

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 51)
6. Click *Save*



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.

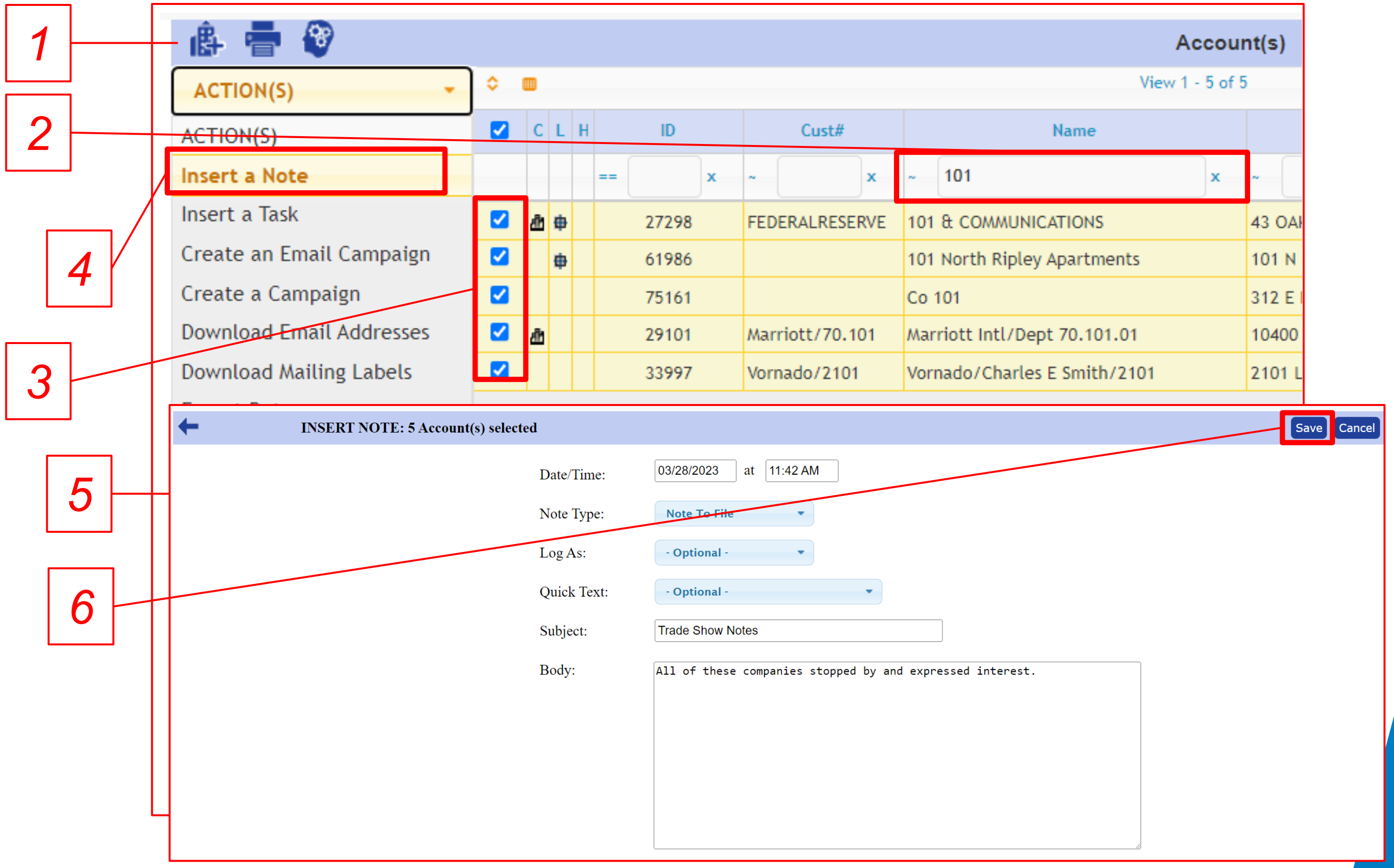


How To: Insert Notes in Bulk

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

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 53)
6. Click *Save*

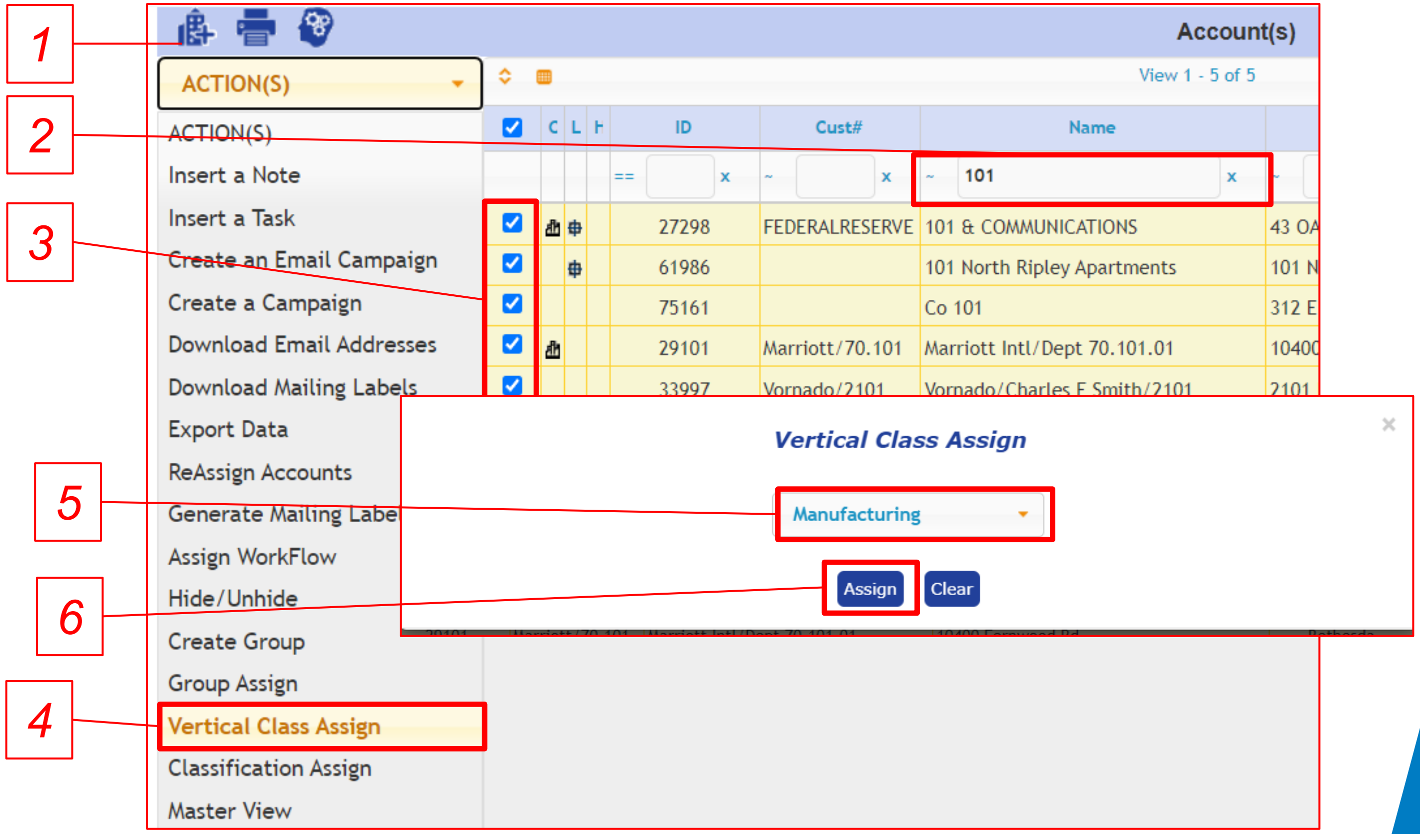


How To: Assign A Vertical Class to Accounts in Bulk

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*



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

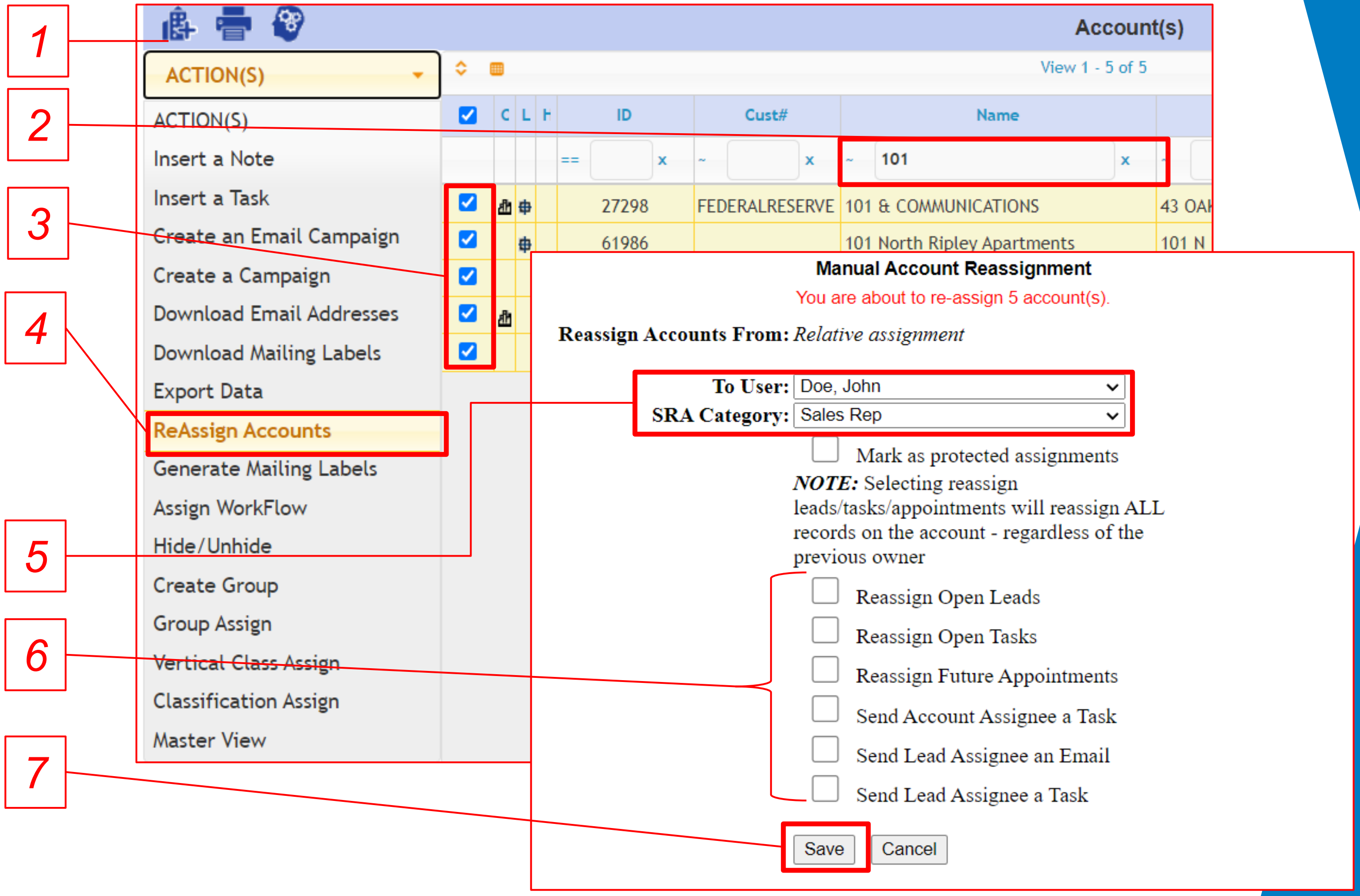
It is possible to assign many accounts to a different sales rep at once.

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.



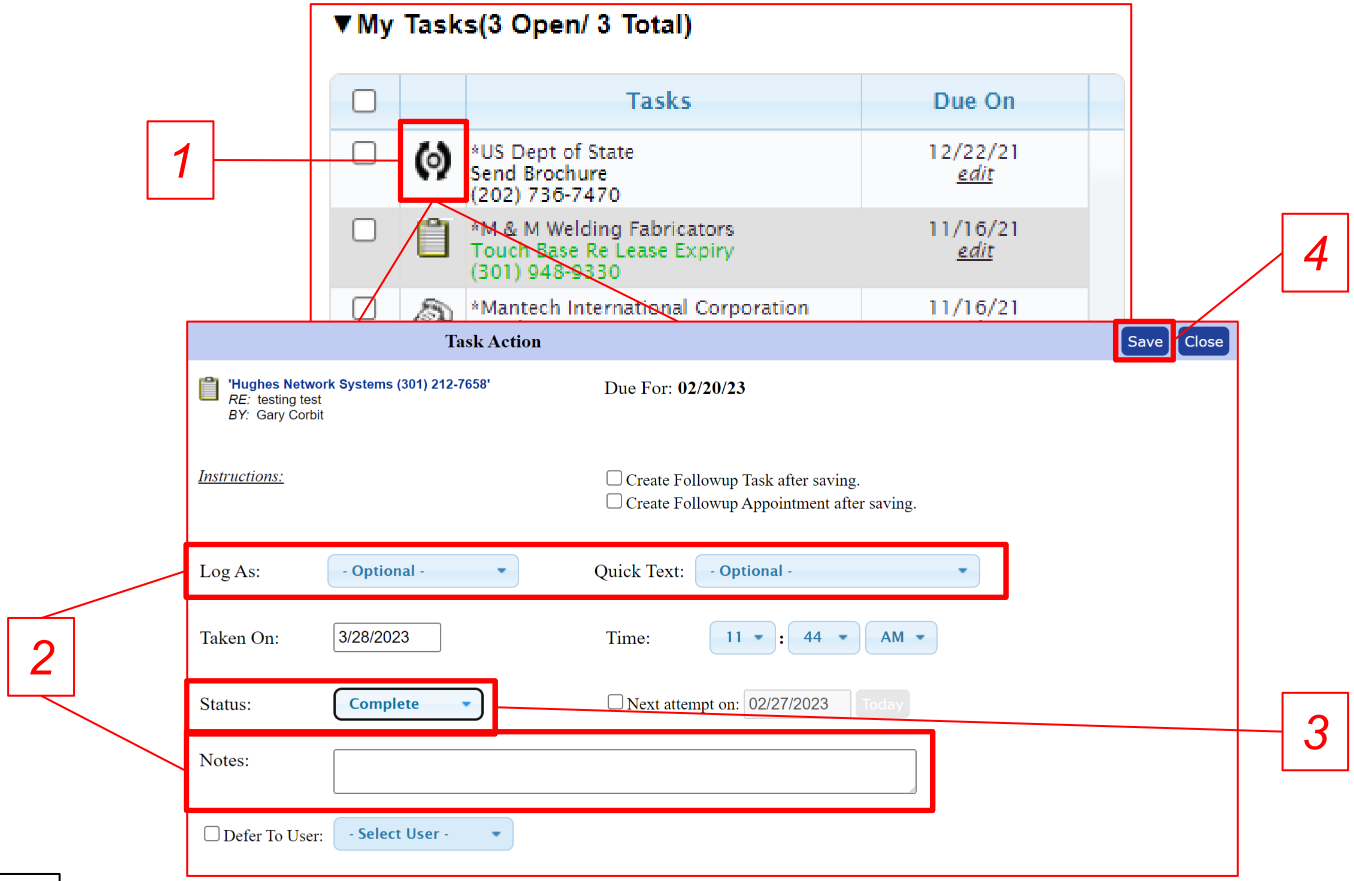
How To: Complete a Task

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:

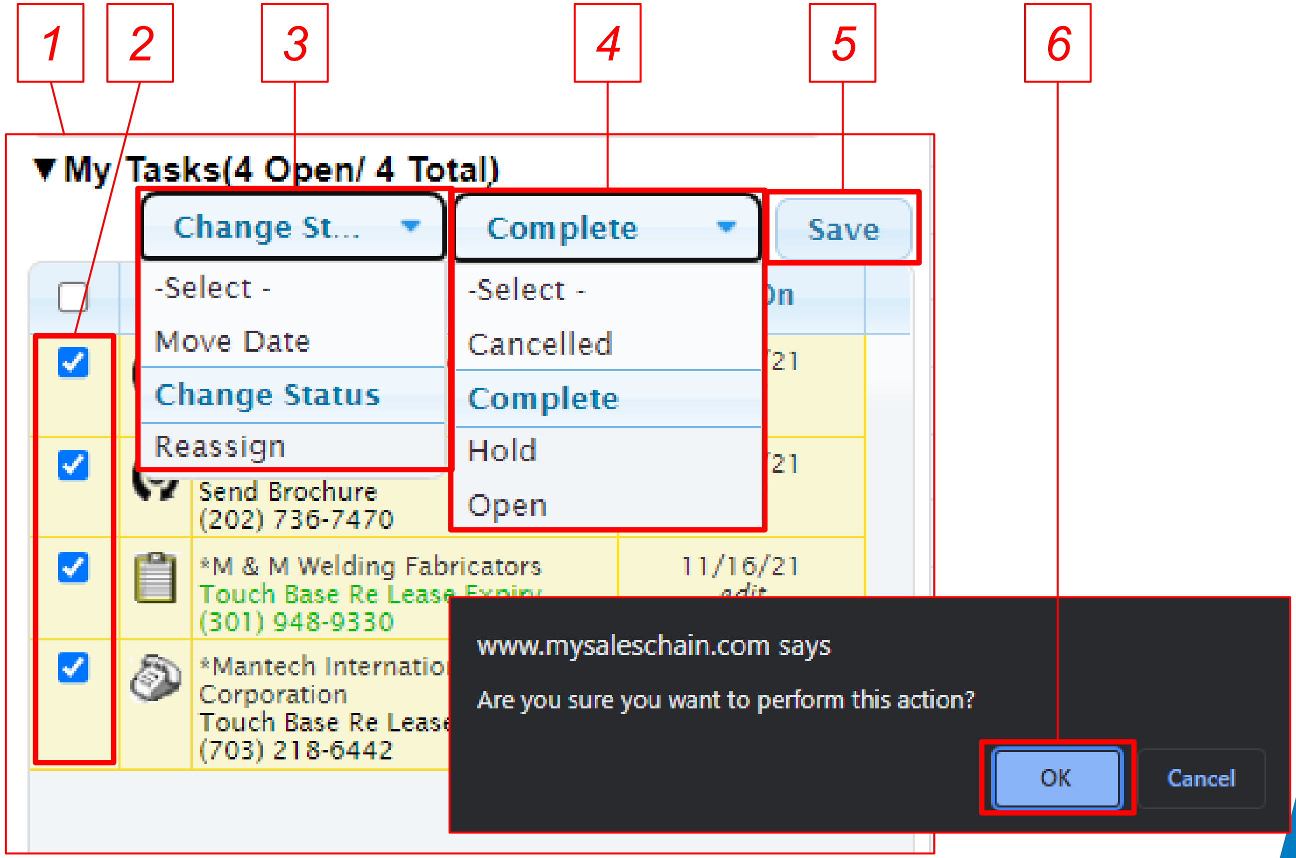
- Task Actions can be started from any screen in which tasks and their respective icons are displayed.
- Use the *Quick Text* drop down to populate the *Notes* box with quick text suggestions.

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 48), 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



Quick Tip:

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

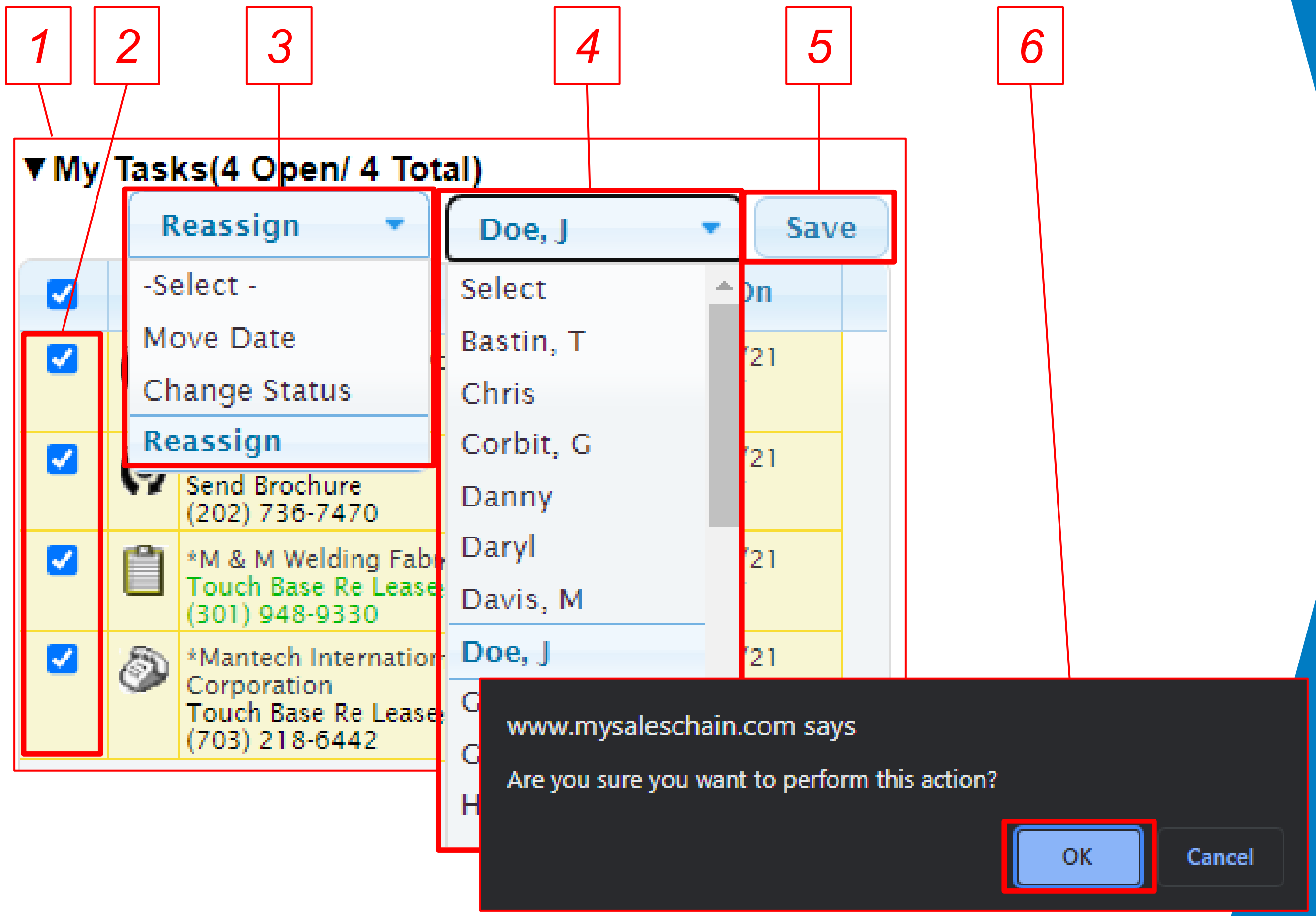
SalesChain™ LEARN

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 48), 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

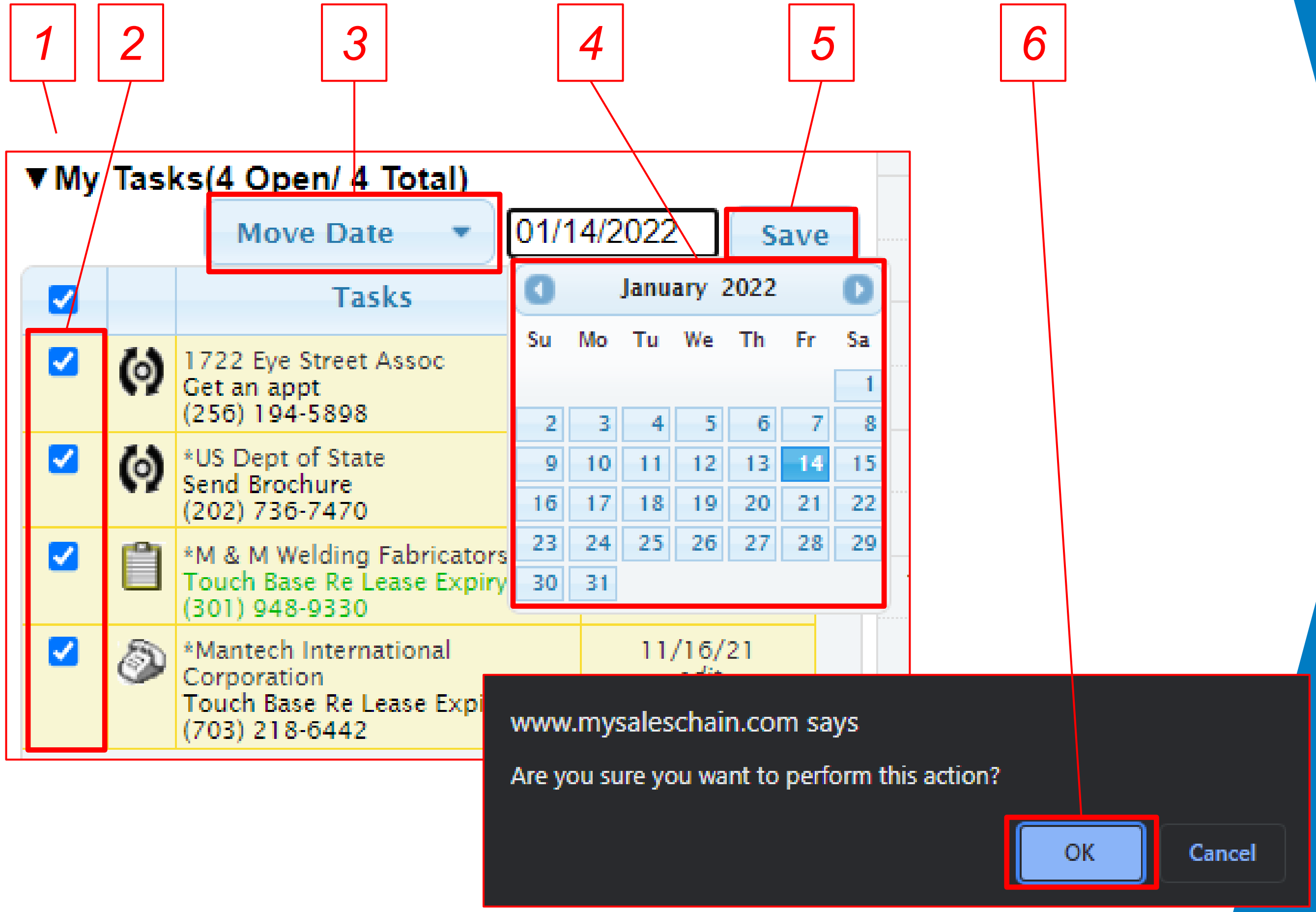


How To: Change The Due Date of Tasks In Bulk

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 48), 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

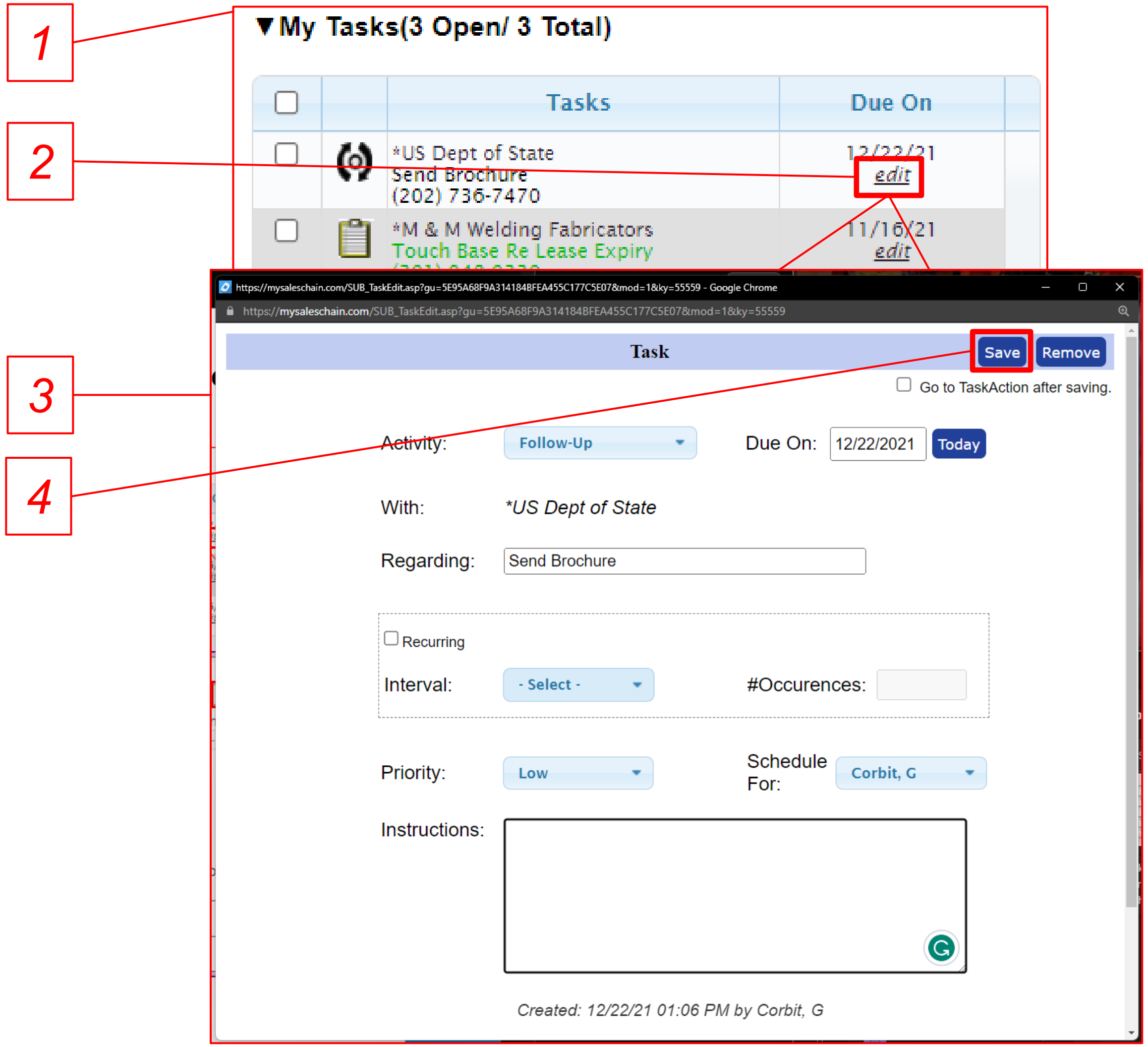


How To: Edit a Task From the Schedule Desk

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

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 48)
3. Make the desired changes to this task in the task dialogue
4. Click *Save*



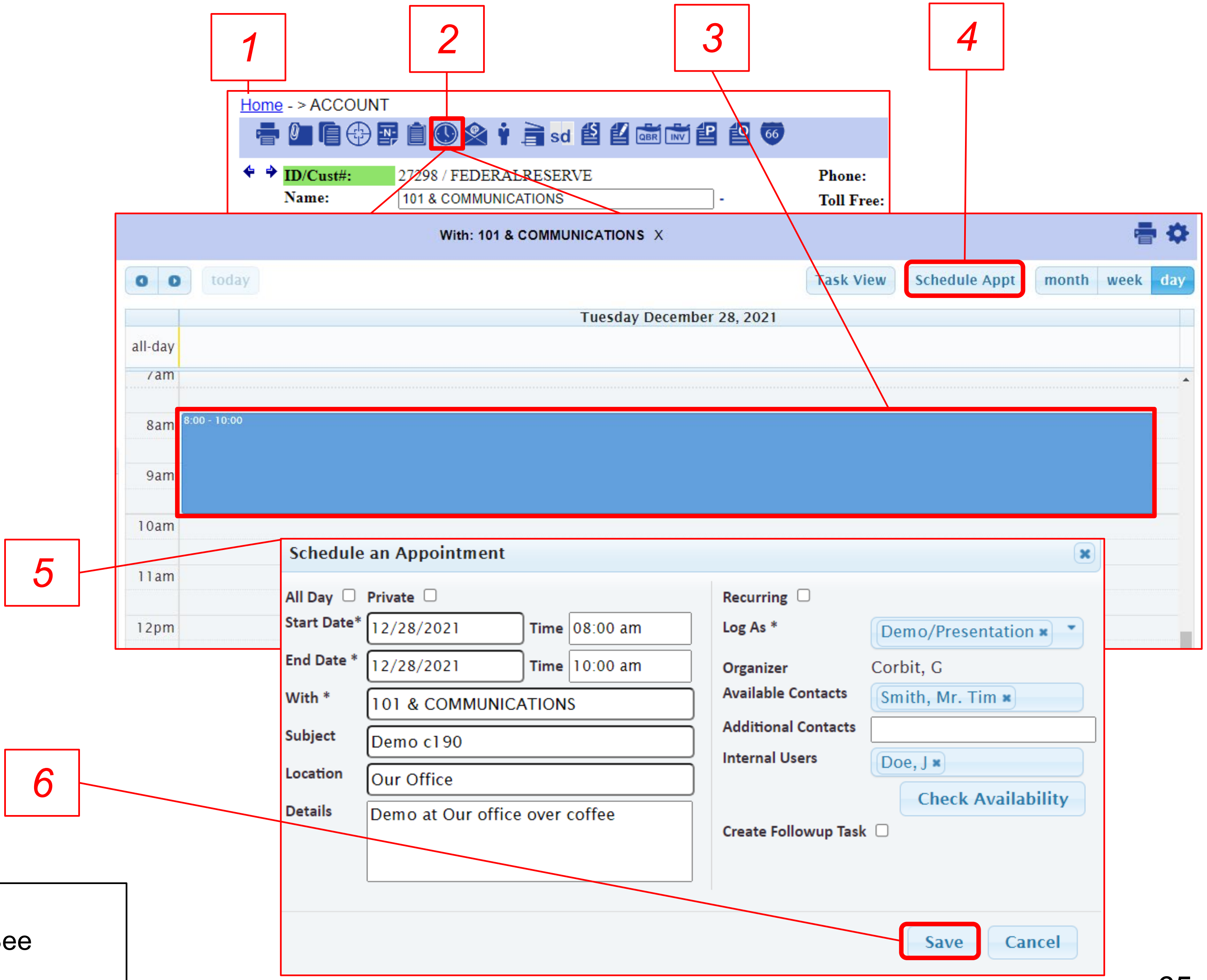
Quick Tips:
To reassign tasks in bulk, see page 62

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 66 –69.

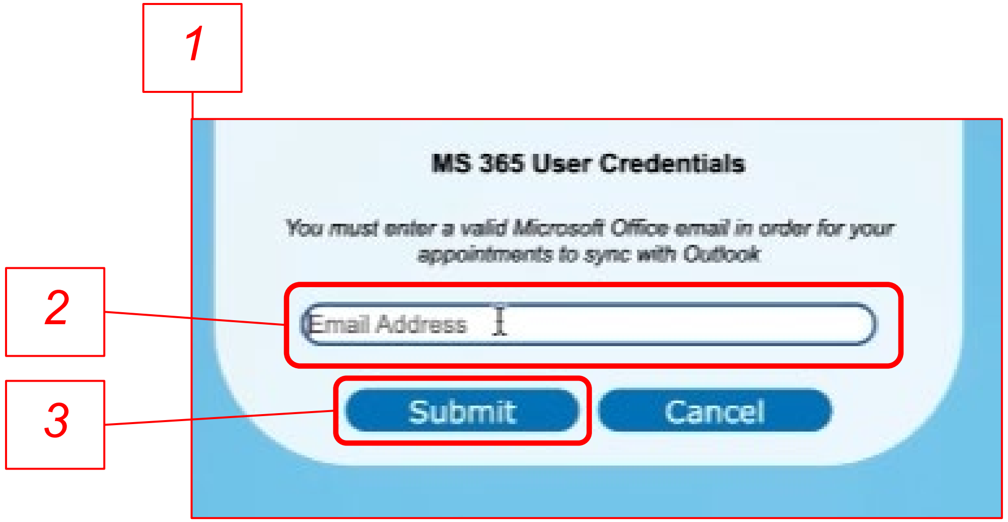
How To: Log Into Outlook 365 In SalesChain

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 (67 - 69)

View a Tutorial Video

To log into Outlook 365 within SalesChain:

1. Navigate to www.mysaleschain.com
2. After entering your SalesChain login credentials, you will be prompted to enter your MS 365 email (See Page 8)
3. Click *Submit*



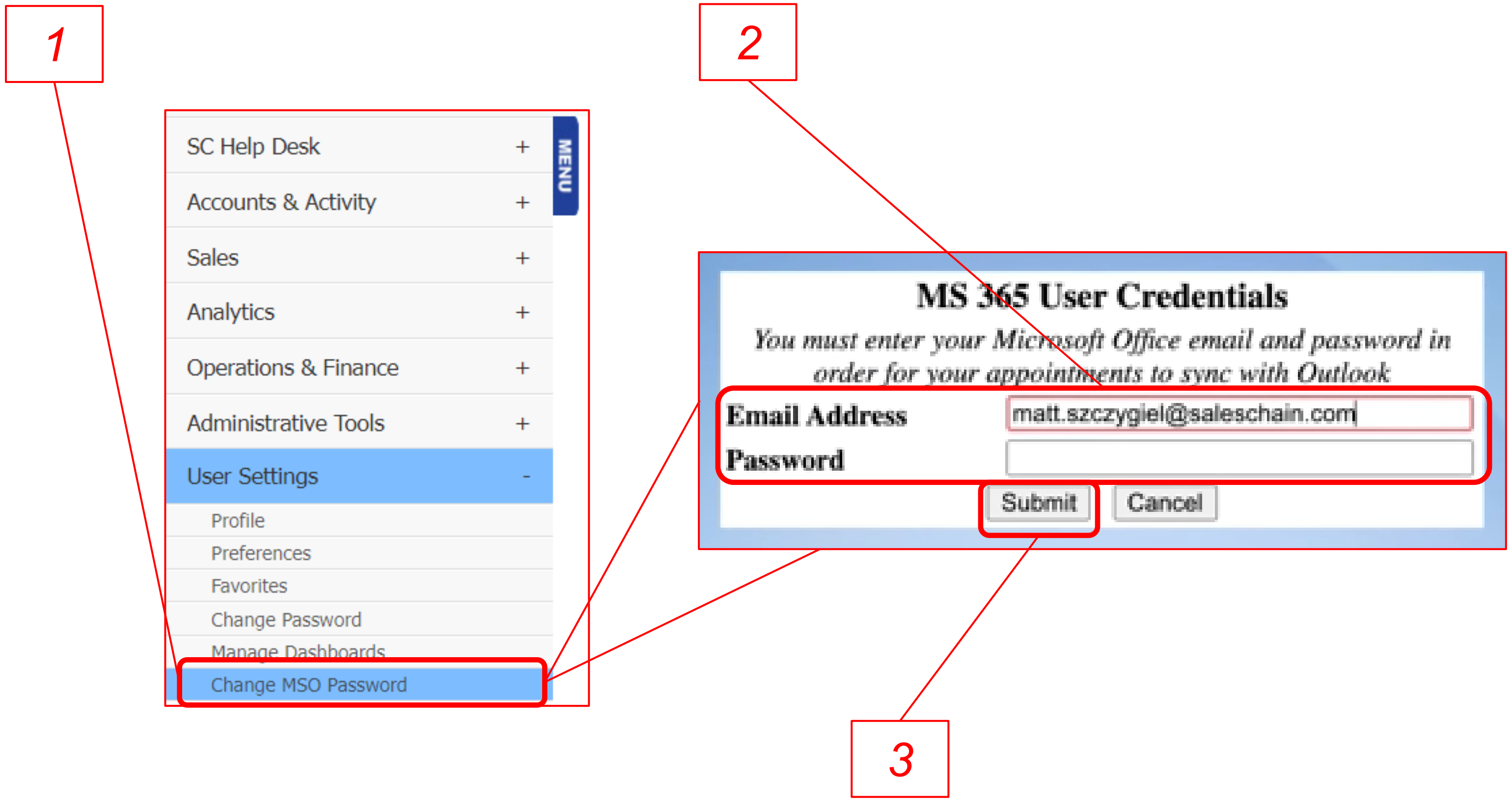
How To: Change Outlook 365 Password in SalesChain

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 66.*

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*



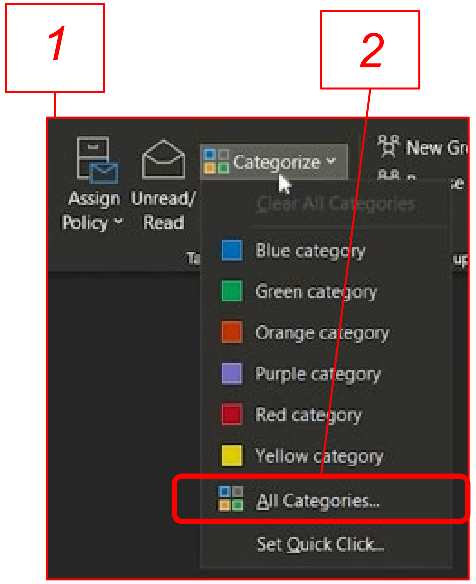
How To: Setup SalesChain x Outlook 365 Email Push

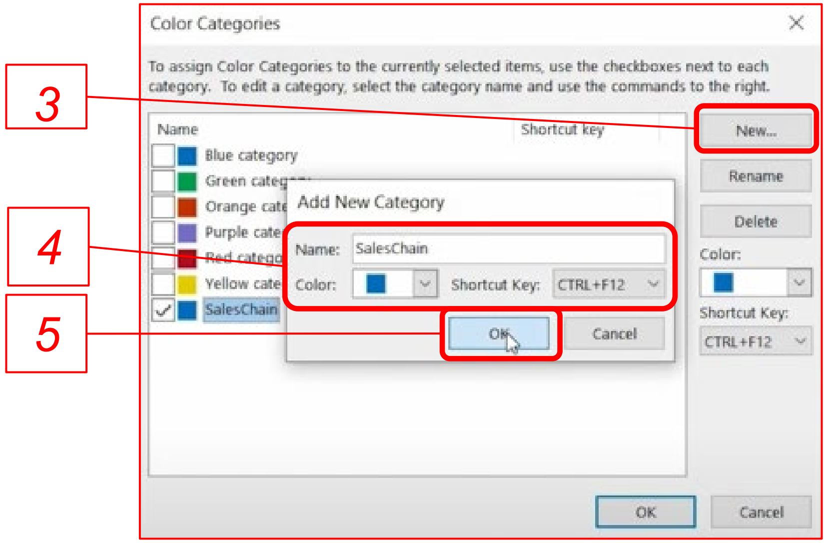
SalesChain pulls in only marked emails to make sure only pertinent information is in the system. You will need to set up a category called *SalesChain* in Outlook, so SalesChain knows what emails to pull in.

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 69 for instructions.

How To: Push Emails From Outlook 365 Into SalesChain

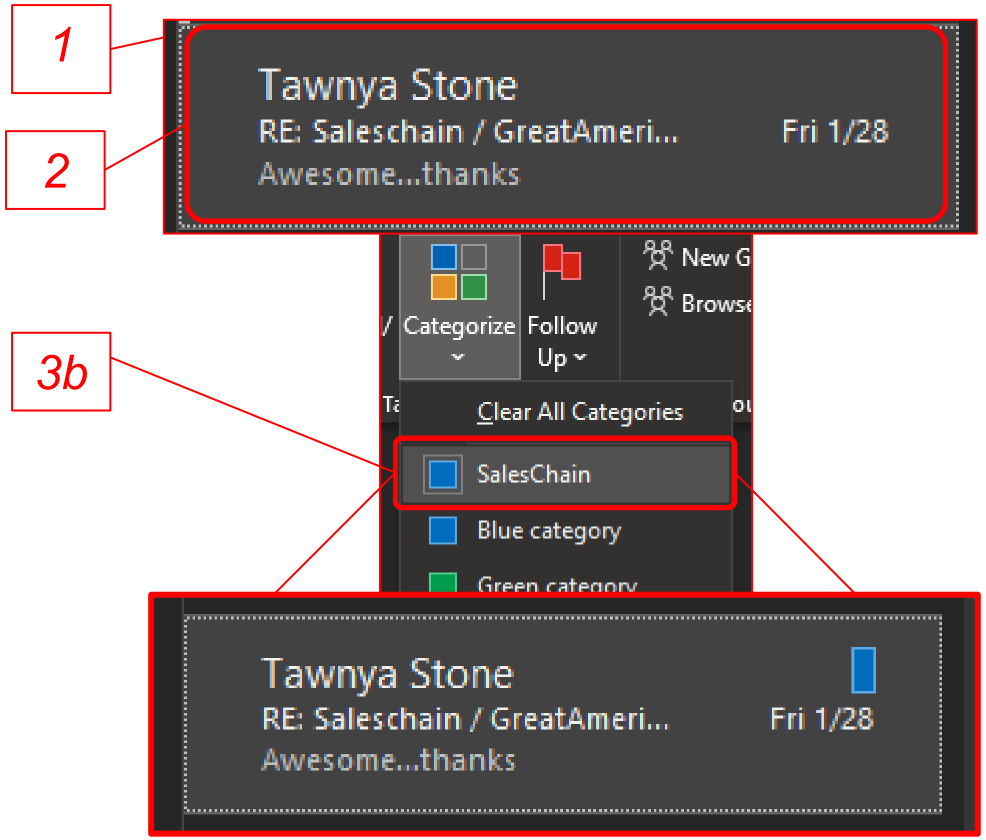
Not all Outlook emails are automatically pushed into the SalesChain system. You can choose which to push by marking them with a category in Outlook. When you do, they will automatically be associated with an account, with a contact within that account, and will be logged in your user activity.

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 68 ***OR*** b) under the *Categorize* drop-down select the *SalesChain* category you created in the manner instructed on page 68

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

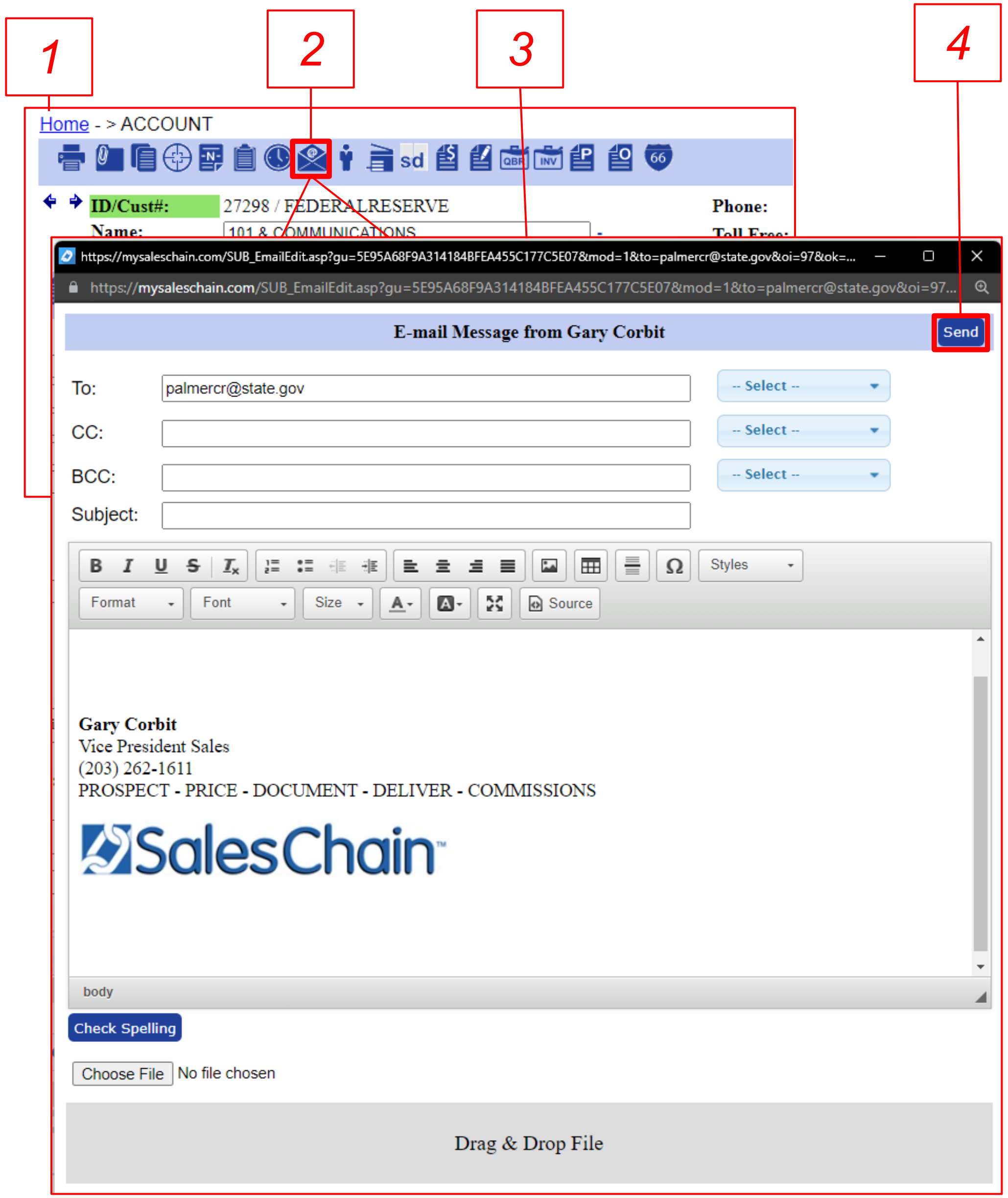


How To: Send an Email From the Account View

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 –select- 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 71 for how to track emails sent from SalesChain and pages 66 - 69 if you intend to send emails from Outlook 365 instead (recommended).

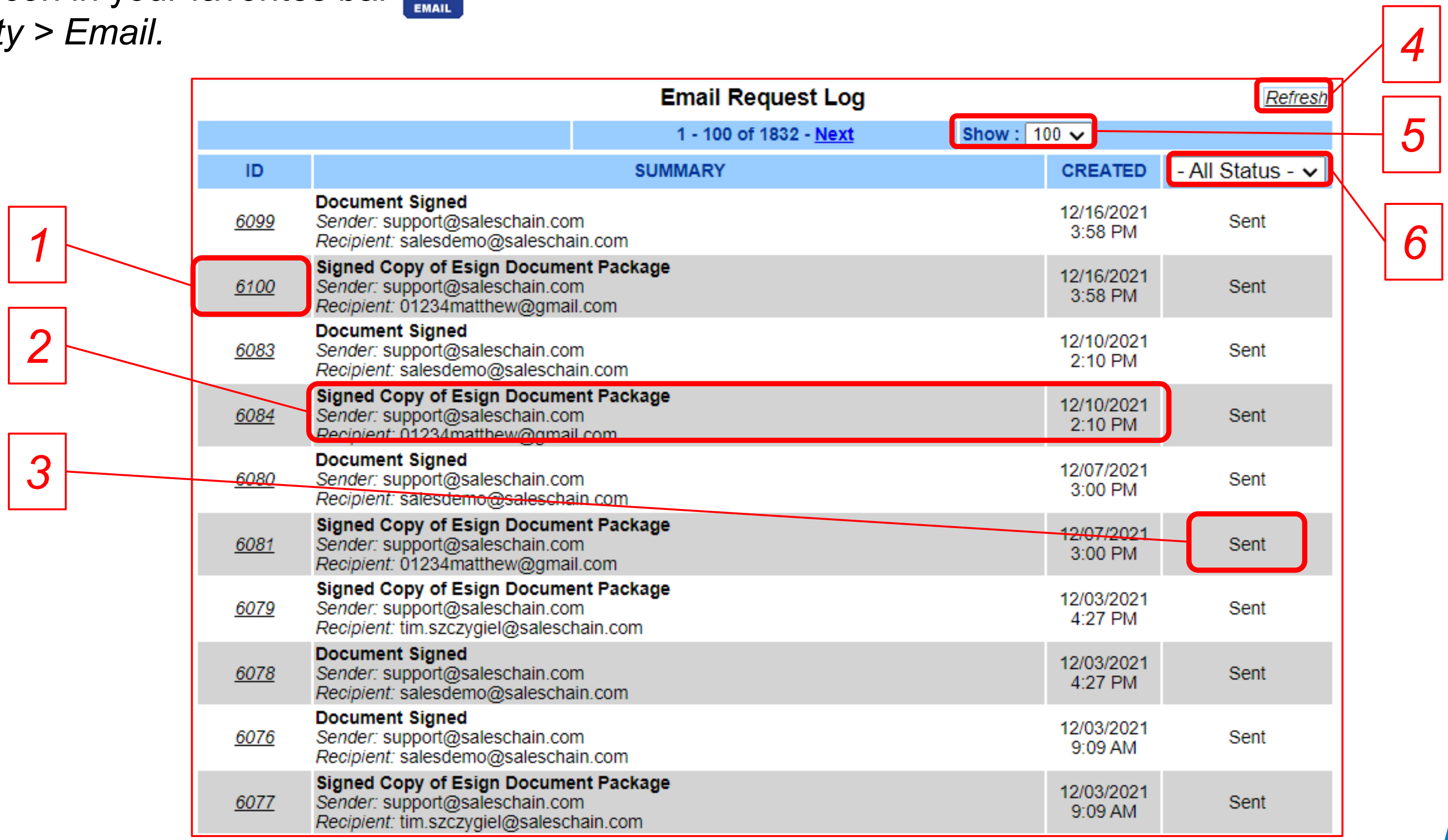
The Email Request Log

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 (*sent* or *staged*)
4) *Refresh* button allows you to see new emails or change search parameters
5) The *Show* drop-down allows you to change how many emails are displayed
6) The –*All Status*- drop-down allows you to sort by email status



Quick Tip:

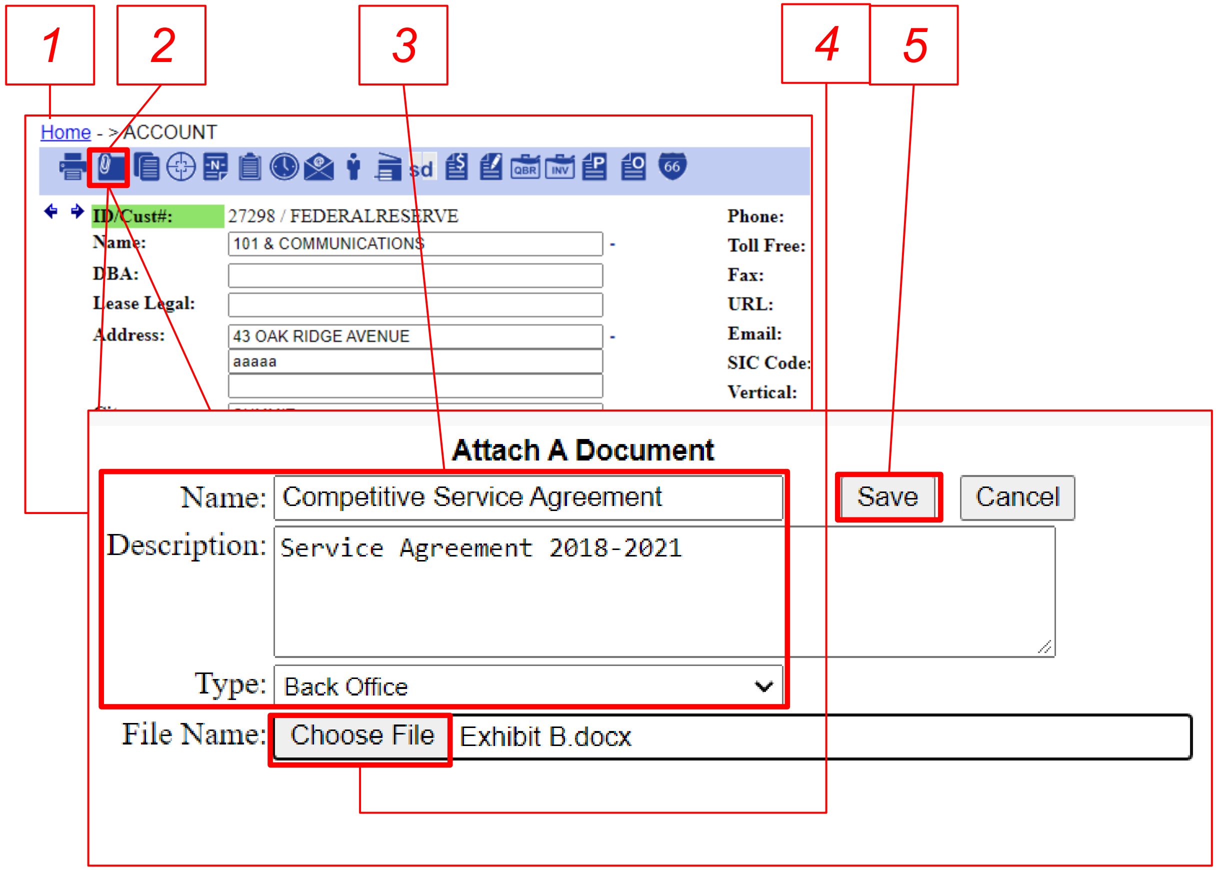
To track the process of e-Signed documents sent out of SalesChain, try the e-Sign Desk (See Page 169)

How To: Attach a File to An Account

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

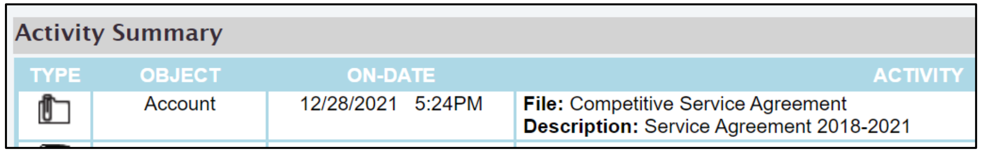
To attach a file to an account:

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*



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

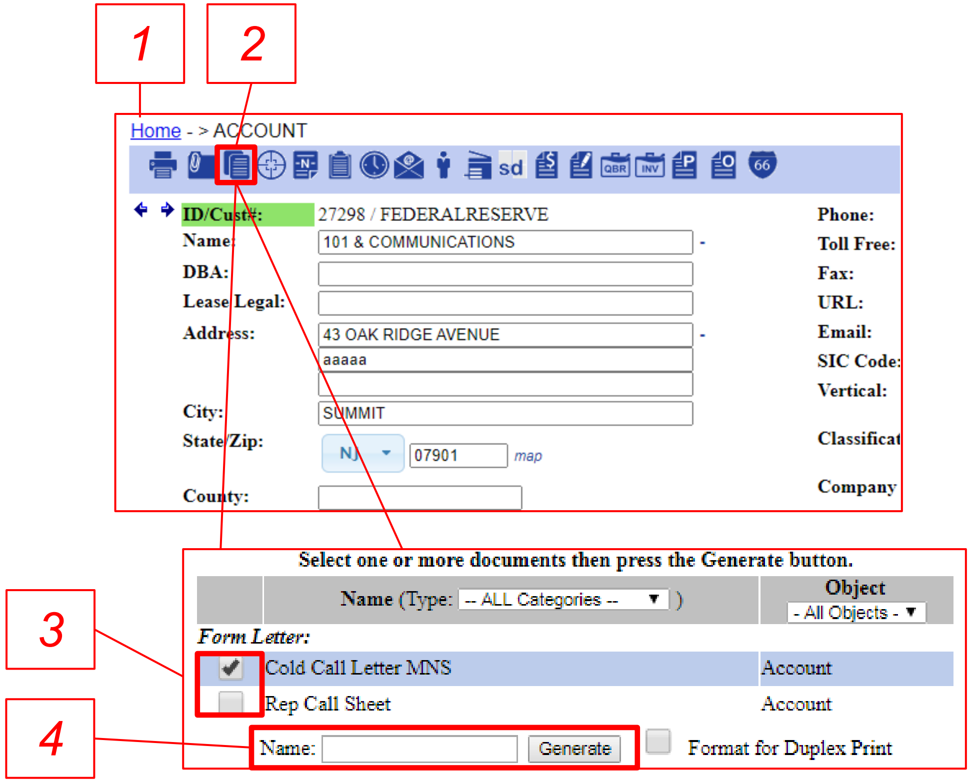
TYPE	OBJECT	ON-DATE	ACTIVITY
	Account	12/28/2021 5:24PM	**File:** Competitive Service Agreement **Description:** Service Agreement 2018-2021

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*



Quick Tips:

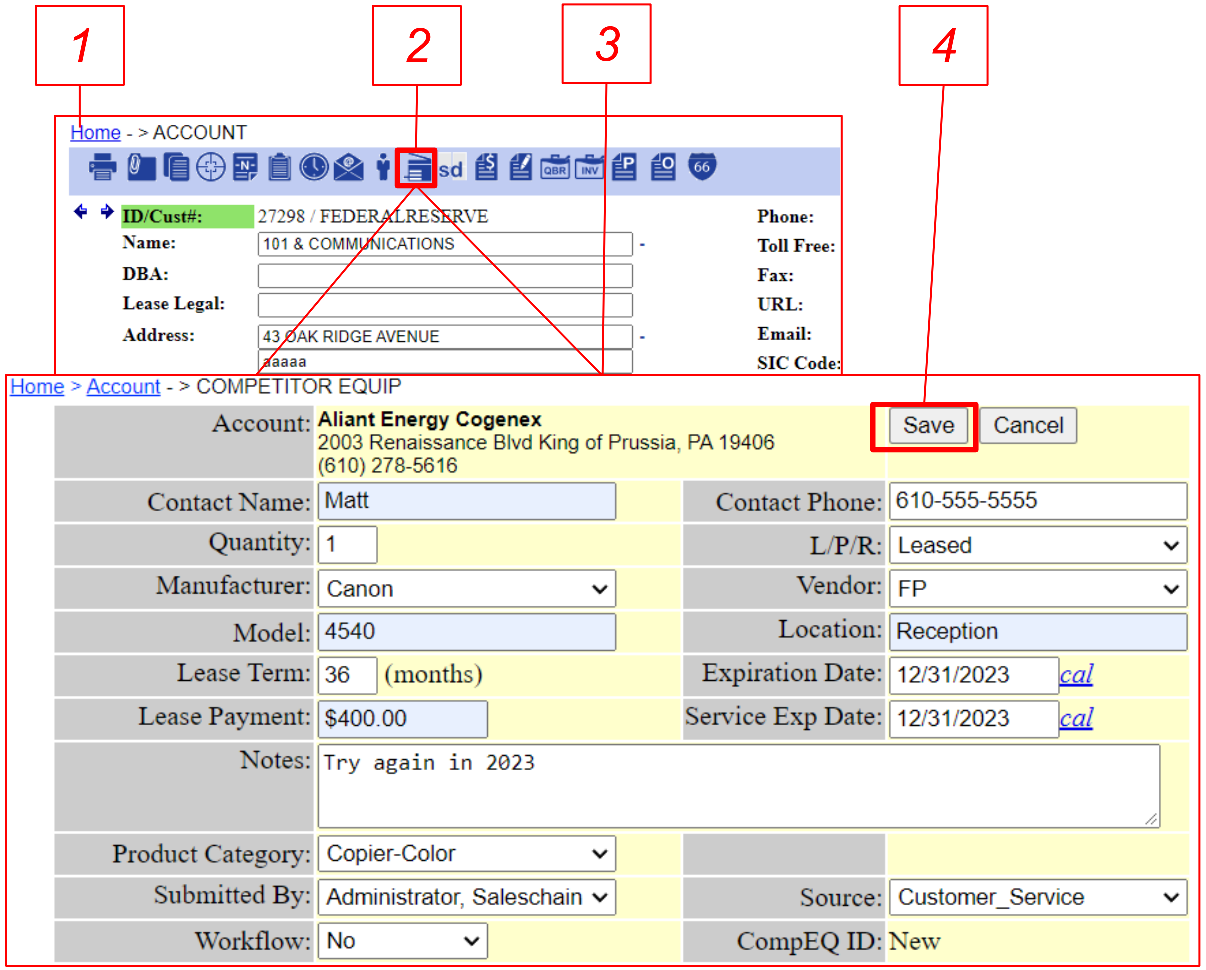
- This is an archived method. We officially recommend that you generate most documents, including all order related and delivery documents, from the proposal and order system. (See Page 166)
- Document packages generated by this method will be accessible via the *Activity* tab in the account view. Clicking on the icon will open the doc package in an online editor.

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.**

4

Deal Pricing:

Pricing, Documenting, Delivering and Funding Processes Within SalesChain

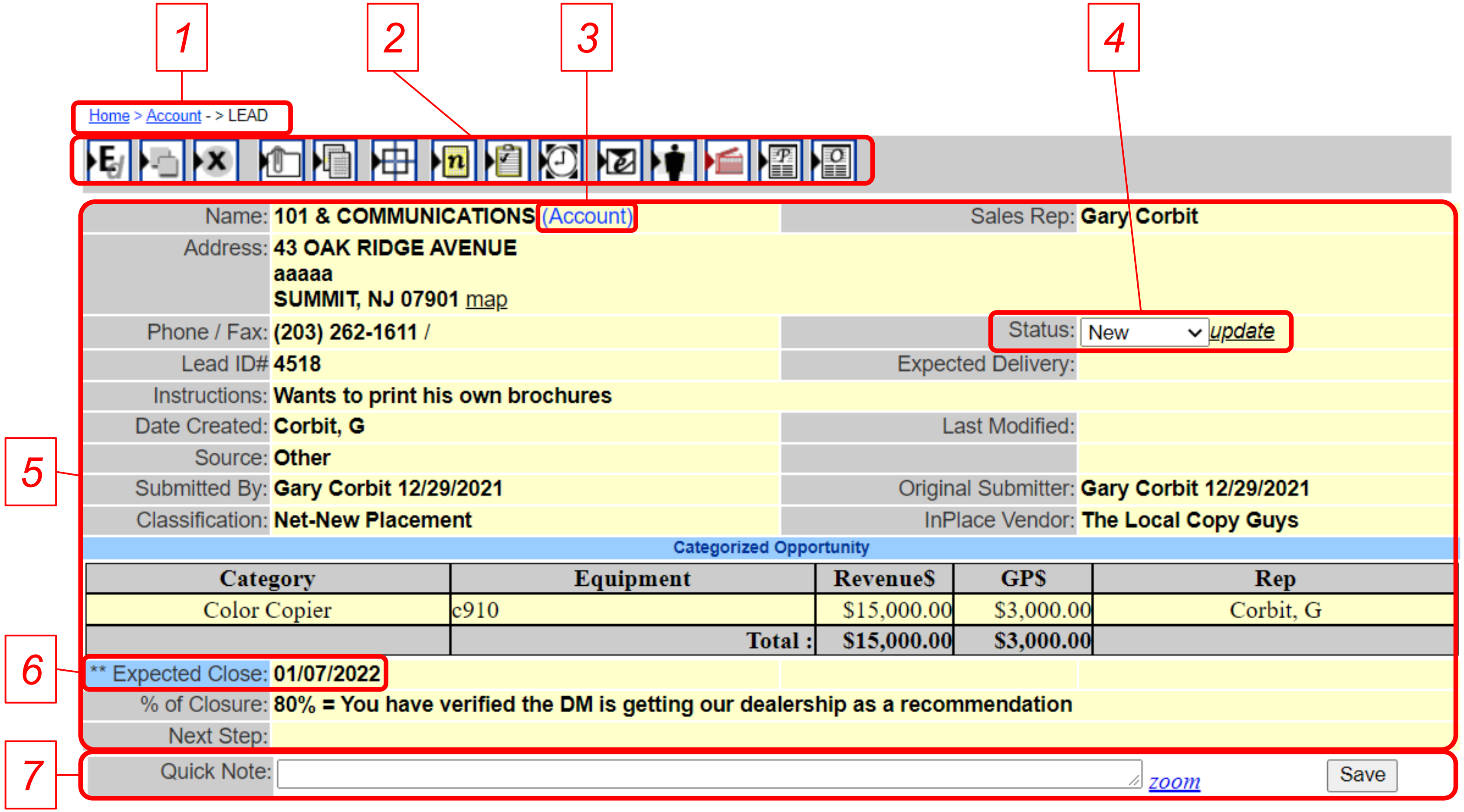
Archive Lead View

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

**See page 78 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



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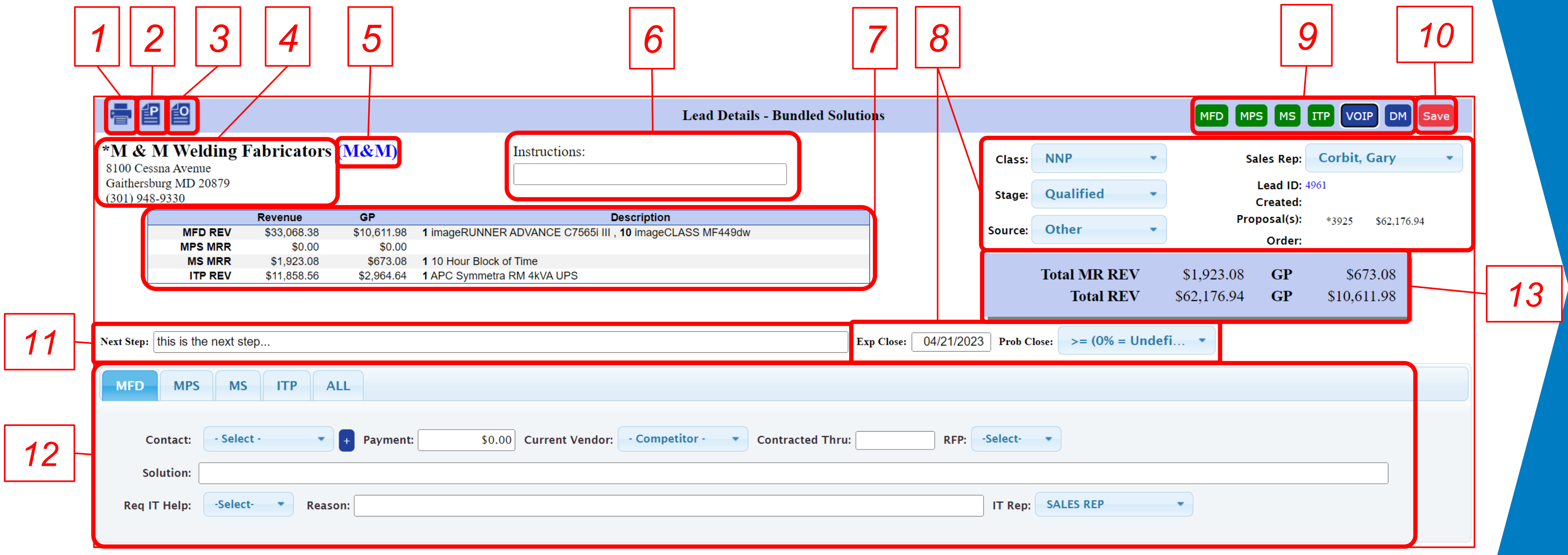
Bundled Lead View

Clicking on any lead, or creating a new lead, will bring you into the lead view.

Key:

1) Print this lead
2) Create a new proposal linked to this lead
3) Create a new order linked to this lead
4) Account Information
5) E-Automate Number (if current customer)
6) Instructions field
7) This lead's financial table (by Product category)
8) General Lead Information
9) Toggle switches for product categories
10) Save Button
11) Next Step Field
12) Detailed entry fields (tabs separate product categories)
13) This Lead's financial totals



Quick Tip:

The acronyms referring to different product categories (like MFD here for Multifunction Devices) are configurable and may vary by system configuration.

Action Icons in the Lead Views

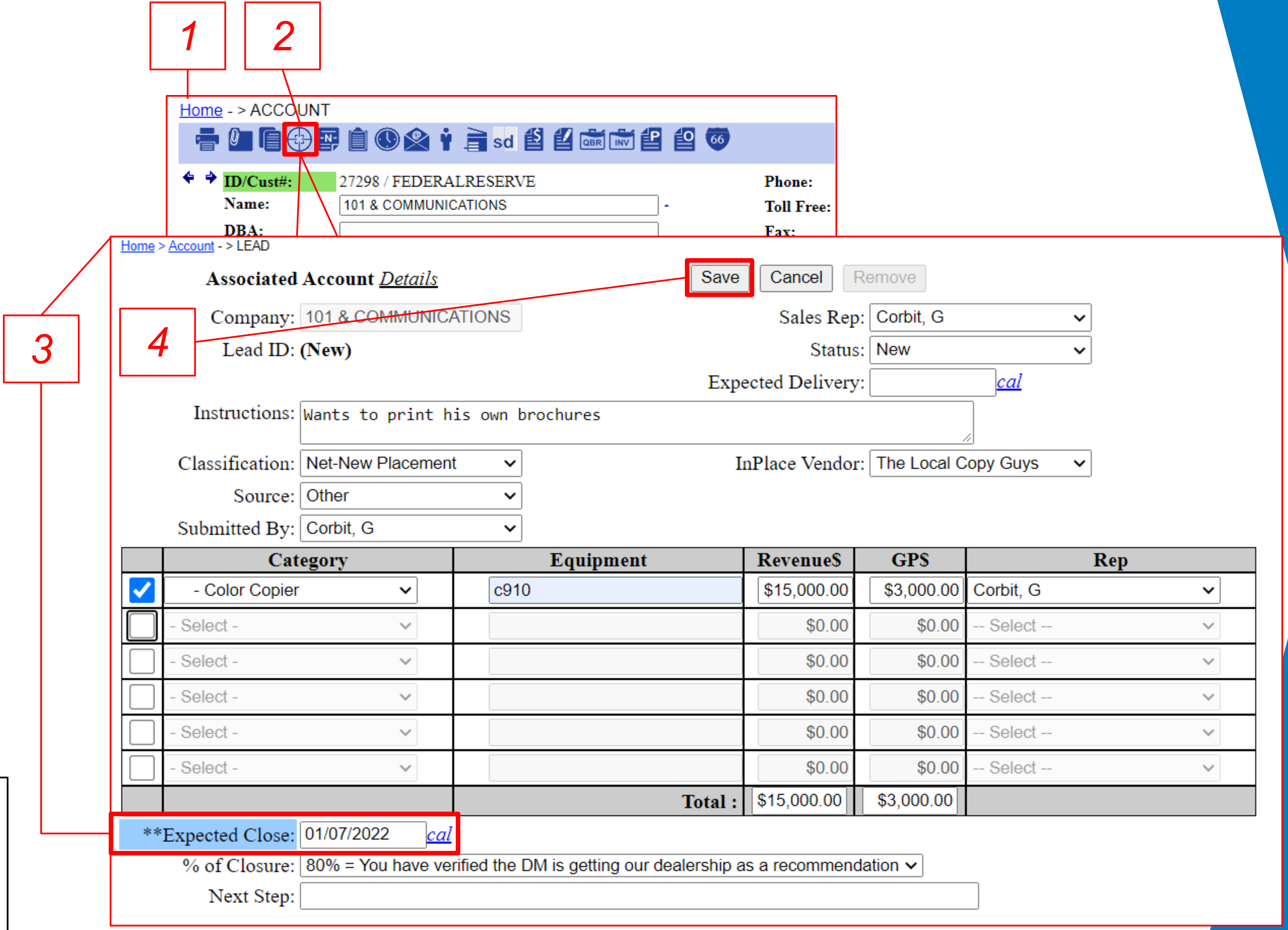
Icon	Associated Action
	Edit this lead
	Clone this lead
	Delete this lead (permission pending)
	Attach a document to this lead
	Generate a document for this lead
	Create a new lead
	Add a new note to this lead
	Add a task to this lead
	Schedule an appointment for this lead
	Send an email to contacts 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
	Print this lead

How To: Create a New Lead (Archive Lead View)

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:

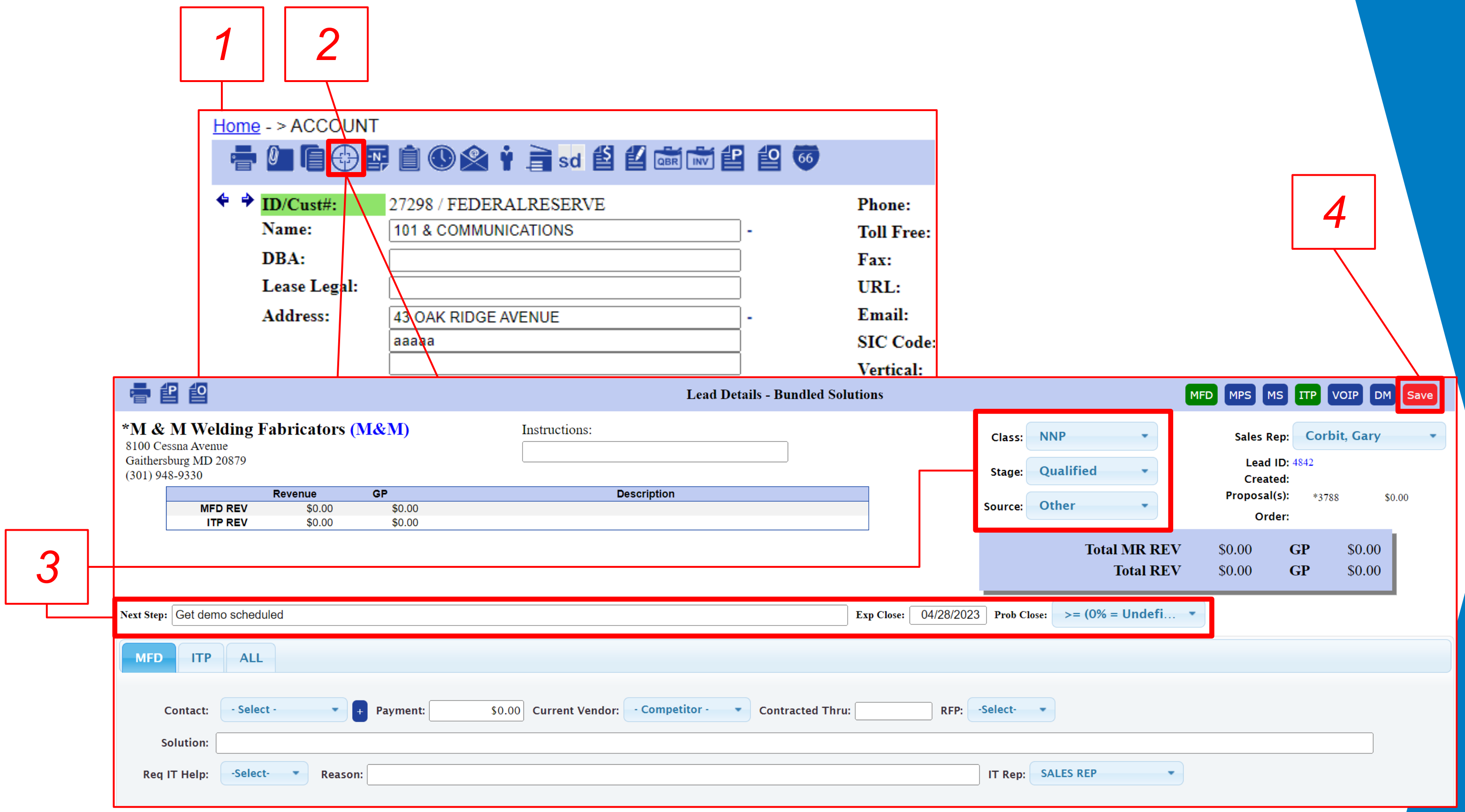
- The expected close date is particularly important since, by default, each lead is placed on the forecast within the month of it's expected close date. **If no date is provided, the lead will not populate on the forecast.**
- Once a lead is created, you can view it under an account's *Sales* tab. One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

How To: Create a New Lead (Bundled Lead View)

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 – the most useful details include the classification, stage, next step, 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 the 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.

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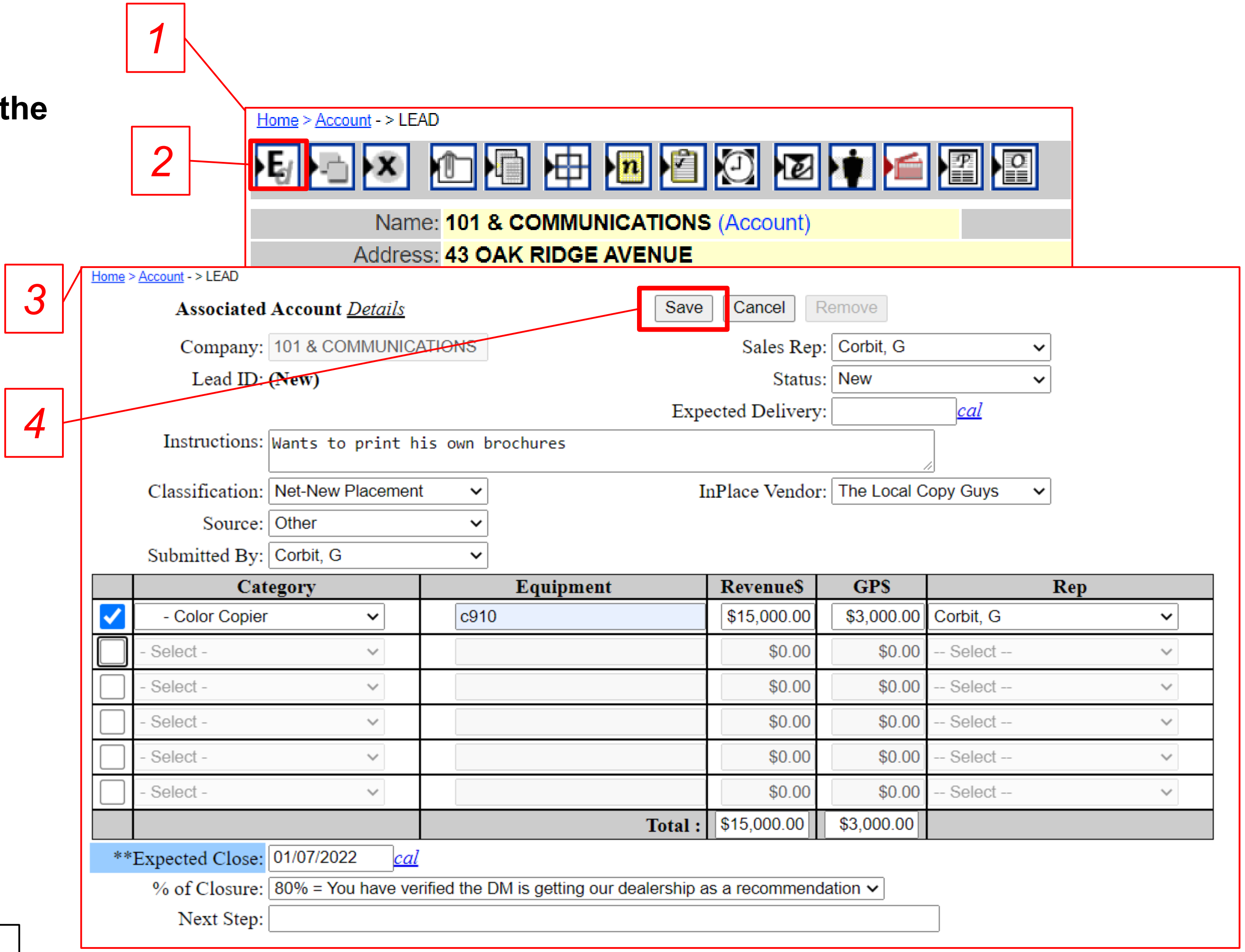
How To: Edit an Archive Lead

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:

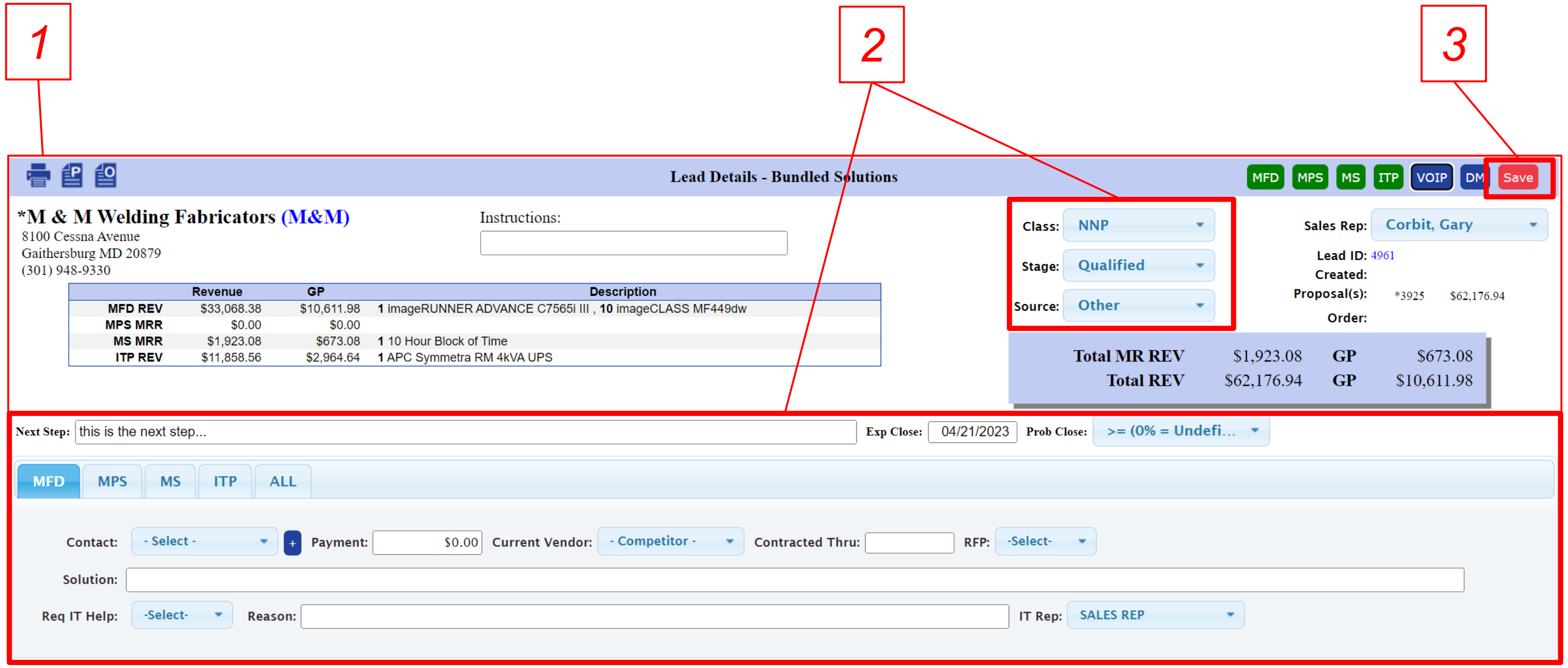
To make changes to leads in bulk, you can use the actions menu of the forecasting tools.

How To: Edit a Bundled Lead

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. Make the desired changes to the lead
3. Click *Save*



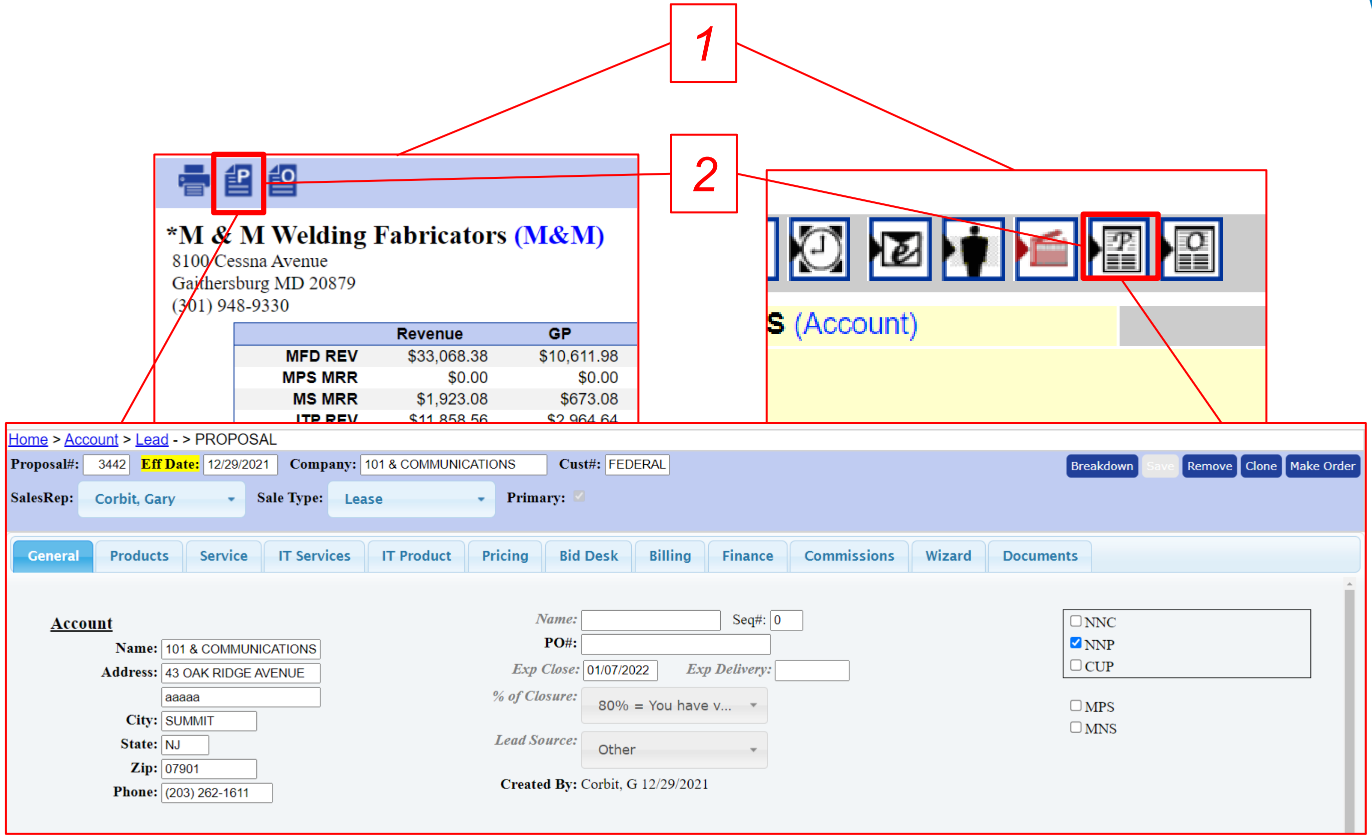
Quick Tip:
To make changes to leads in bulk, you can use the actions menu of the forecasting tools.

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 80, the information from this lead will populate in the *General* tab of the order breakdown.

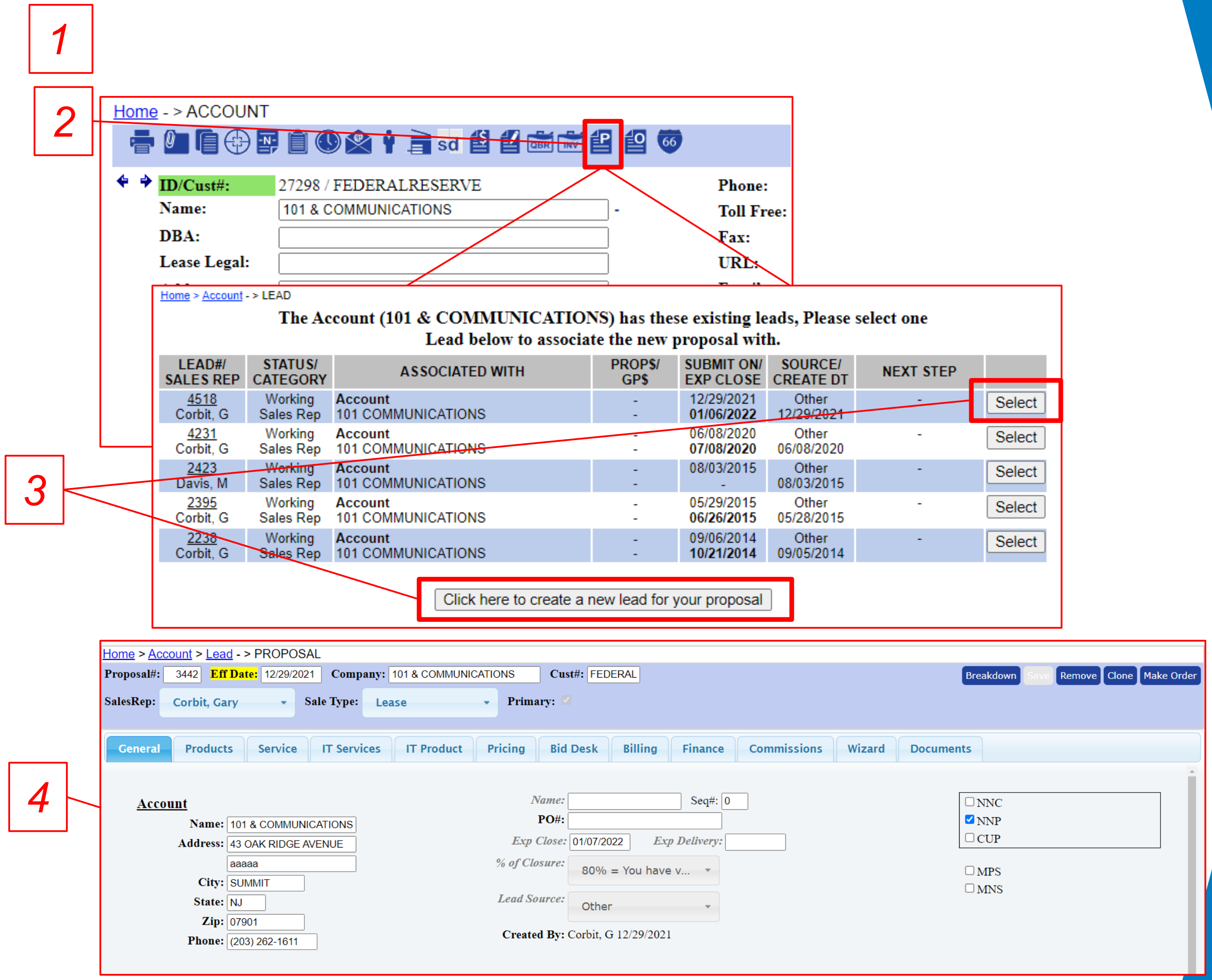
SalesChain™ LEARN

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:

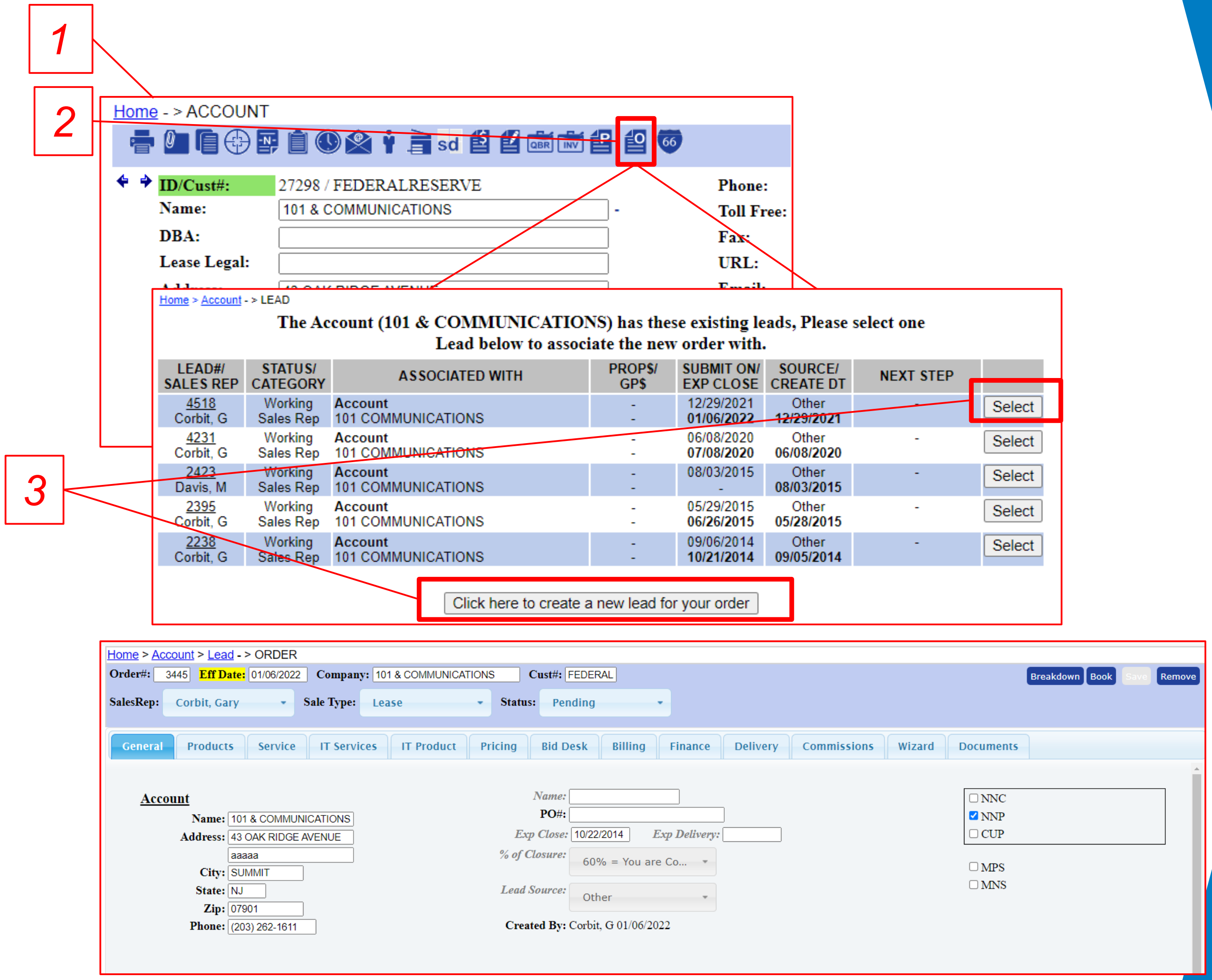
- Always give your proposals a name in the center column to be able to more easily identify them.
- It is possible to have many proposals associated with one lead. The *Primary* proposal will be the proposal whose value shows on your forecast. To clone a proposal, see page 86, to make a proposal into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

How To: Create a New Order From the Account View

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:

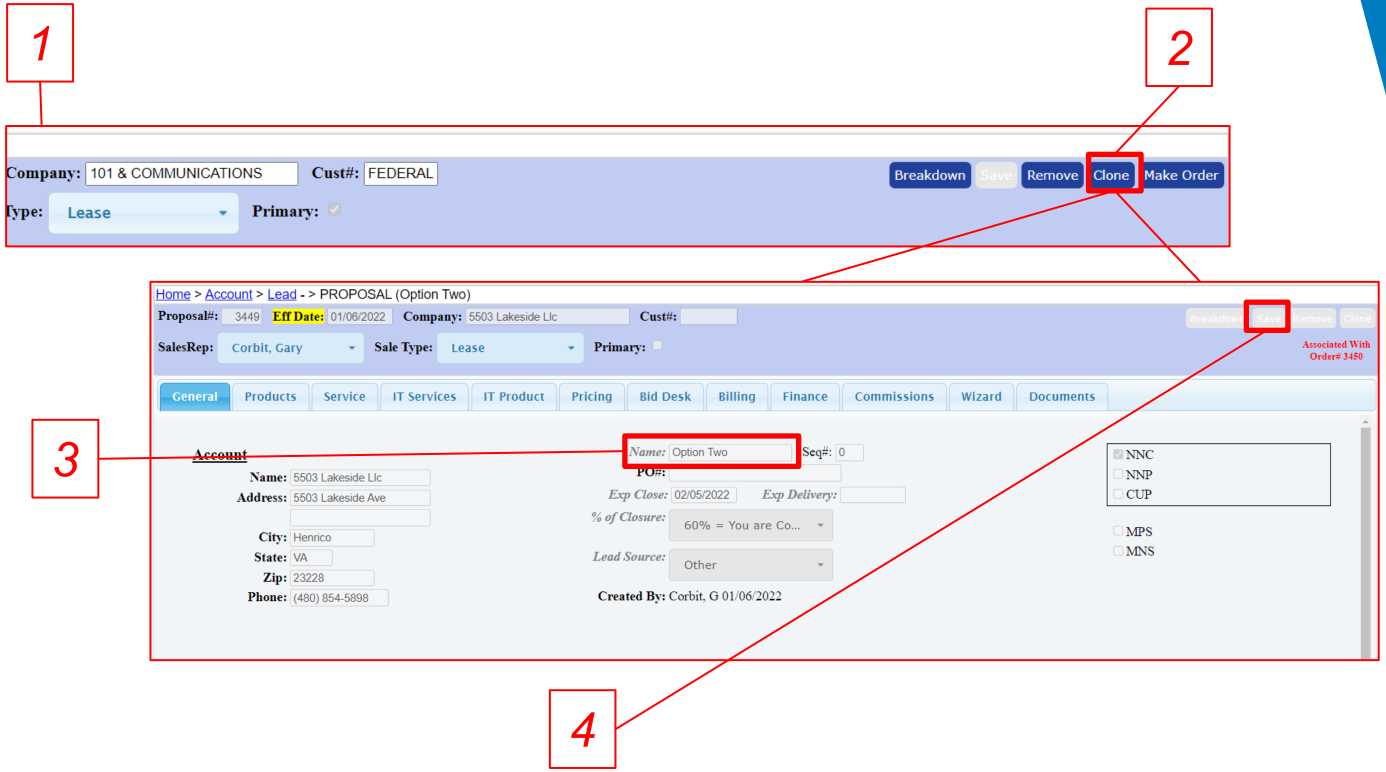
- Always give your orders a name in the center column to be able to more easily identify them. This name will only be visible to system users.
- It is only possible to have one order associated with one lead. To offer a customer multiple options, use proposals instead.

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*



Quick Tips:

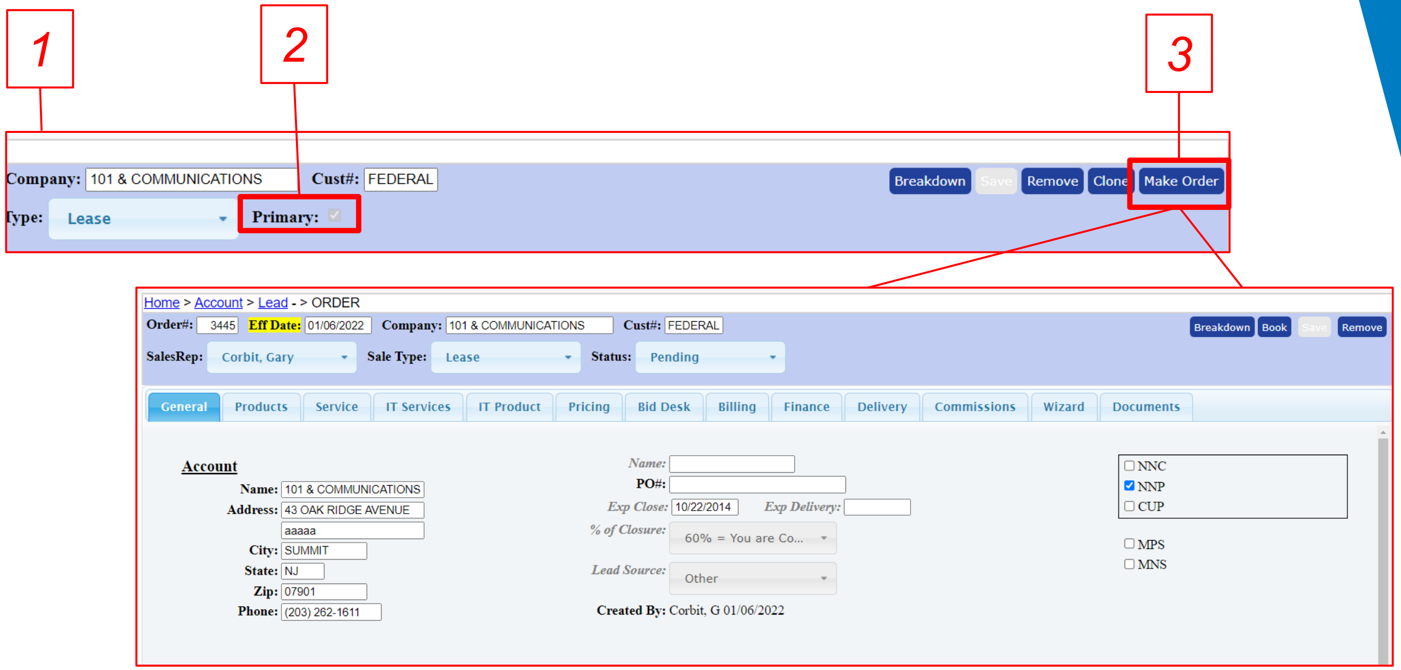
- The cloned proposal will not be designated as the primary unless you check the Primary box
- Be sure to name your second proposal for easy reference later. This name will only be visible to system users.

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* button -- You will be taken to the order breakdown screen for this new order.

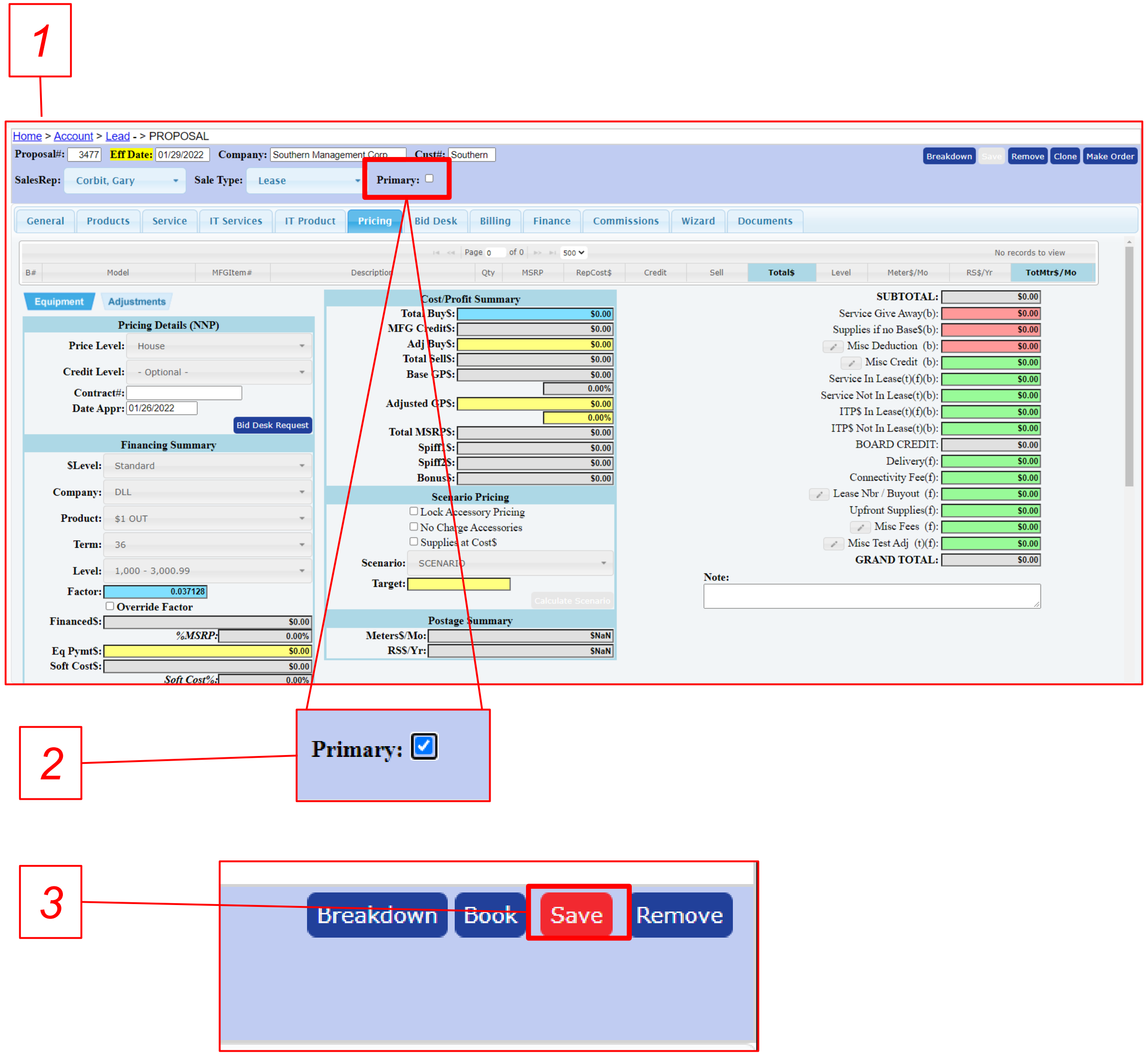


Quick Tips:

- 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

How To: Set a Proposal as the Primary Proposal

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 set a proposal as the primary:

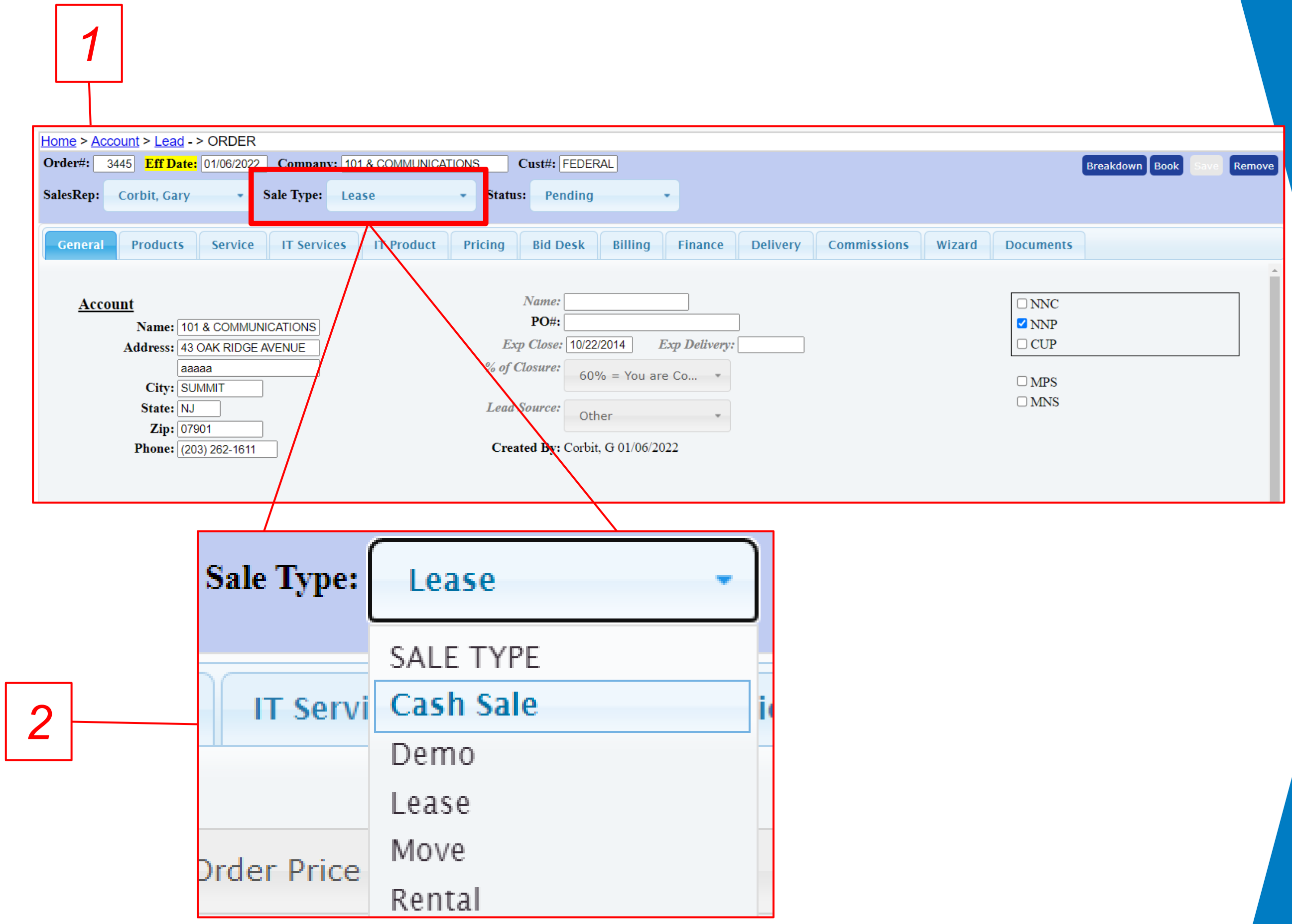
1. Navigate to the desired proposal
2. If unchecked, check the box next to *Primary*
3. Click the red flashing *Save* button

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: Change a Proposal or Order’s Sale Type

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.

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

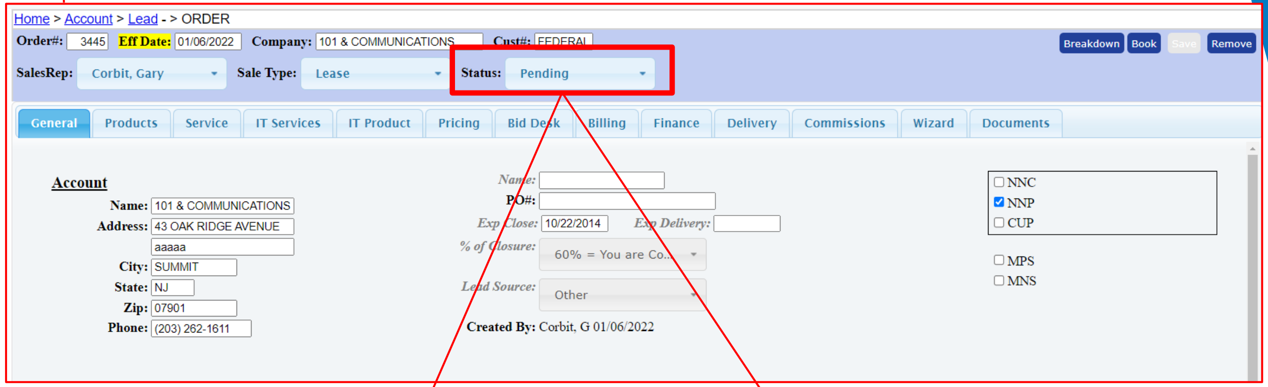
How To: Change an Order's Status

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.

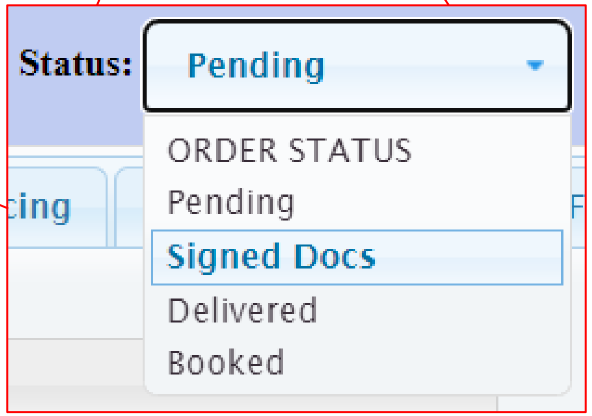
To change an order's status:

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

1



2



Quick Tips:

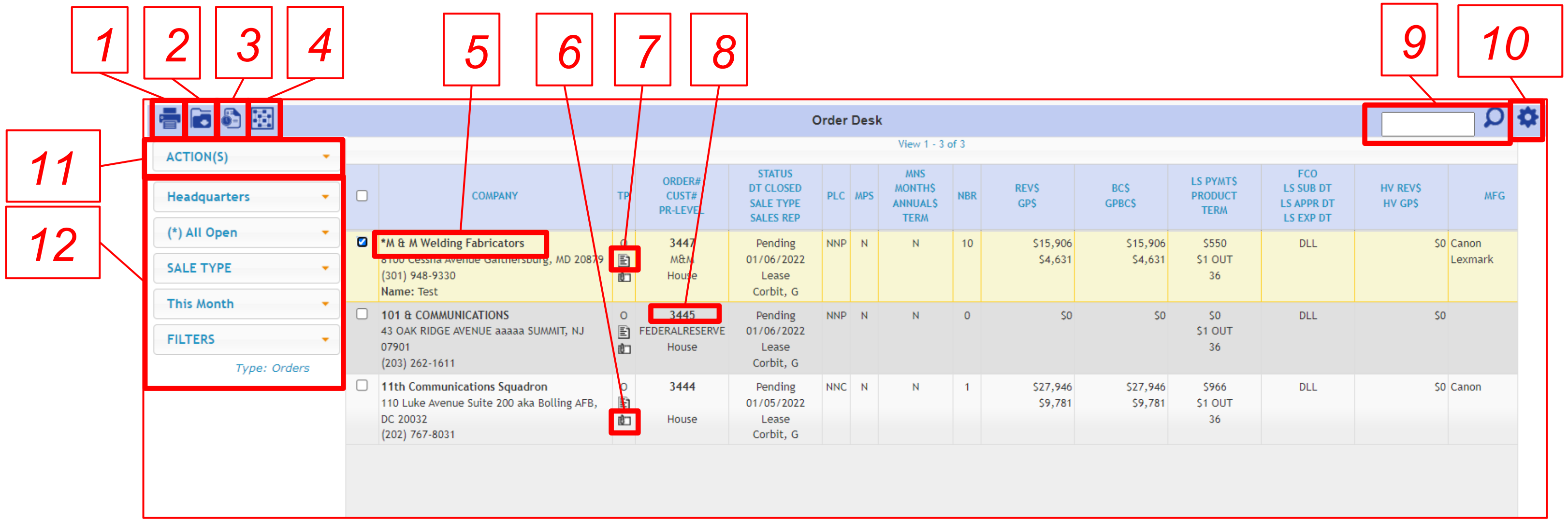
- The Status drop-down will only be displayed on orders, not proposals.
- Order status options are customized upon system configuration and may vary greatly. Consult your system administrator if you're not sure which status to use at what point in the order process.

The Order Desk

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*

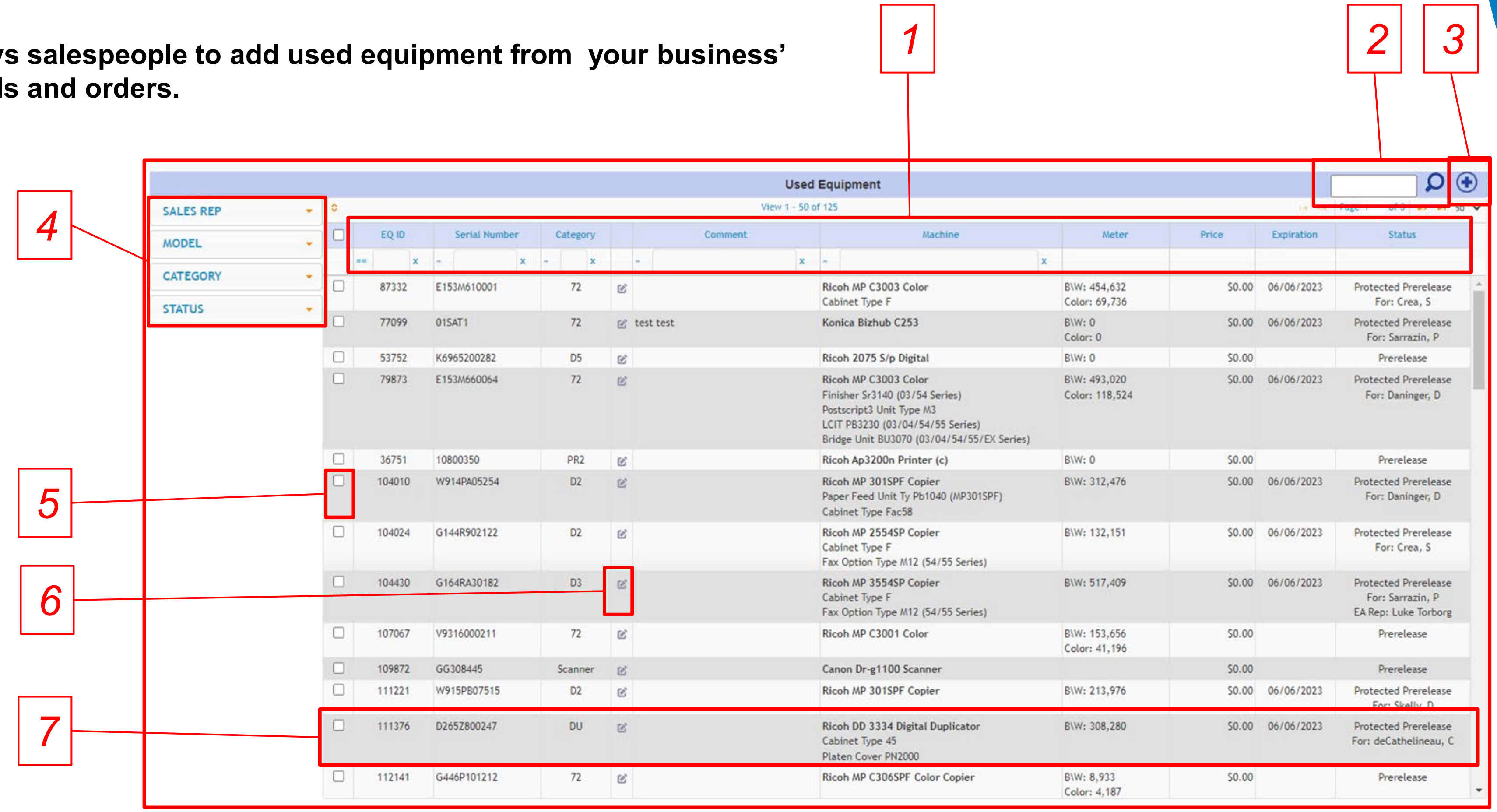
Key:

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
11) Actions Drop-Down
12) Filters for searching



The Used Equipment Desk

SalesChain's Used Equipment Desk allows salespeople to add used equipment from your business' e-Automate inventory directly to proposals and orders.



Key:

1) Column headers with search boxes
2) Keyword search box
3) Save view button
4) Drop-down filters for searching
5) Select this machine
6) Make a note on this inventory item
7) Each row of the table represents a machine and its accessories.

Quick Tip:

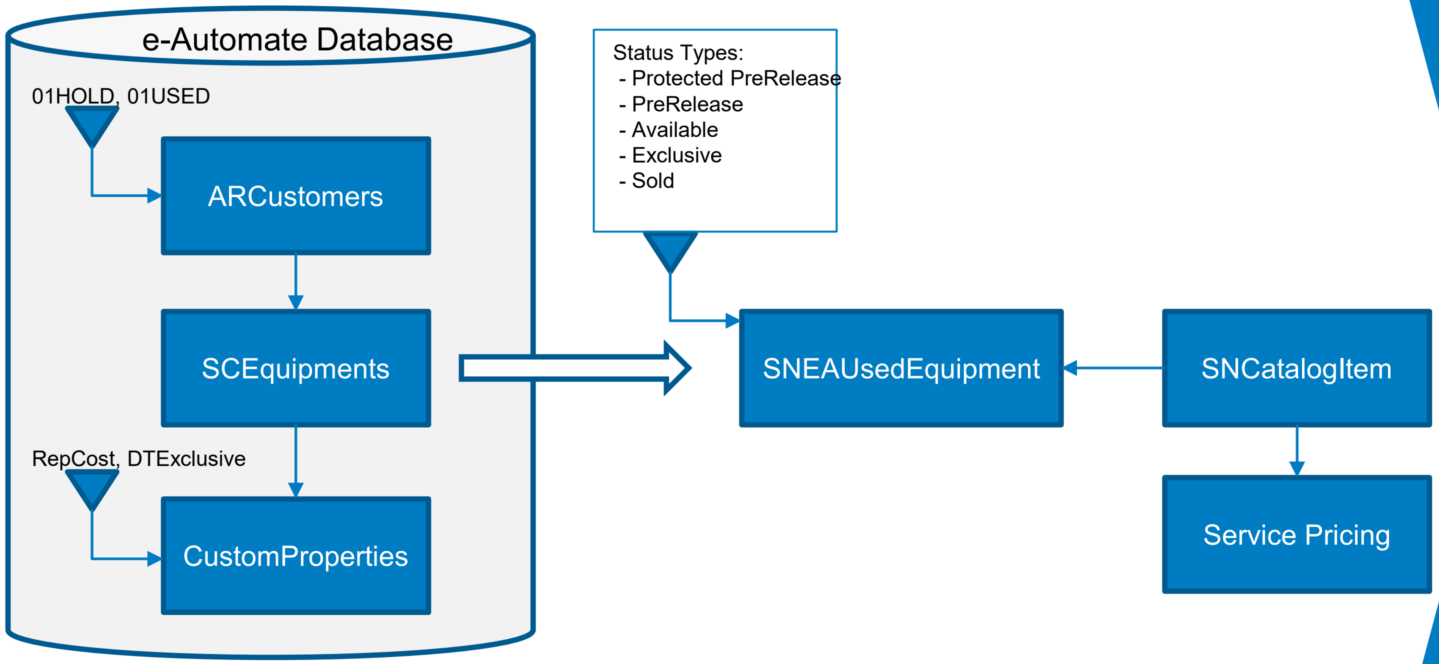
If one or more used machine is selected, an actions drop-down will appear above the filters to the left of the table.

How To: Organize Used Equipment Data in e-Automate for SalesChain's Used Equipment Desk

SalesChain's Used Equipment Desk allows salespeople to add used equipment directly to proposals and orders.

The UE listing is sourced from the e-Automate database. UE will be associated with a designated customer(s). Pricing for the UE will be stored as a custom property that will be defined by the dealer. Every hour, the UE data will be synchronized and stored within the SalesChain database.

Important: SalesChain's used equipment desk reads information from a specific customer in e-Automate. For SalesChain to read this information properly, used equipment must be allocated to this specific customer so that SalesChain can read all of the assets from this specific customer.



Quick Tip:

PreRelease: This status indicates that a link of the UE model to the SalesChain catalog item is required. This link will provide service pricing to reps when adding used equipment to proposals and orders.

Columns in the Used Equipment Desk

Column	Explanation
EQ ID	The unique EA Equipment ID representing the machine
Serial Number	The machines serial number
Category	The EA Product Category code
Comment	A free form comment related to the machine
Machine	Summary description of the machine and accessories
Meter	The machine’s meter readings
Price	The rep cost for the machine
Expiration	The date that exclusive or protection expires
Status	The status field displays the UE Status, rep ownership, and associated proposal and orders.

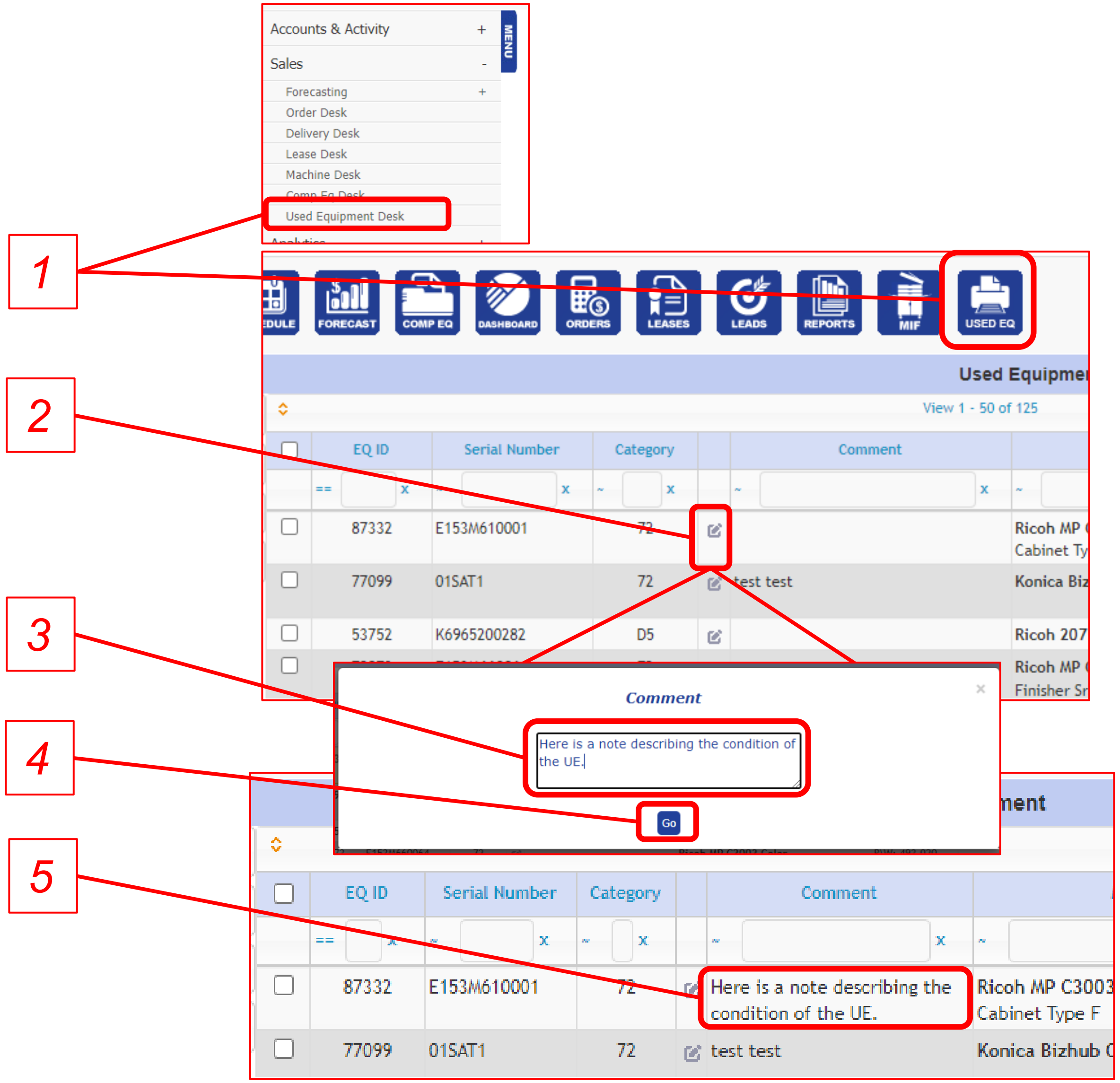
How To: Add a Note to a Used Machine

It is possible to add a free-form note to any used equipment item displayed in the used equipment desk.

Important: This is a permissioned action. If your note icon is grayed out, consult your system administrator.

To add a note to a used machine:

1. Navigate to the Used Equipment desk by clicking on Used EQ in your Favorites bar or navigating to *Menu->Sales->Used Equipment Desk*
2. Click on the note icon in the row associated with the desired machine.
3. In the pop-up dialogue, enter the note you would like to add.
4. Click *Go*
5. Your note will be added to the machine in the table.



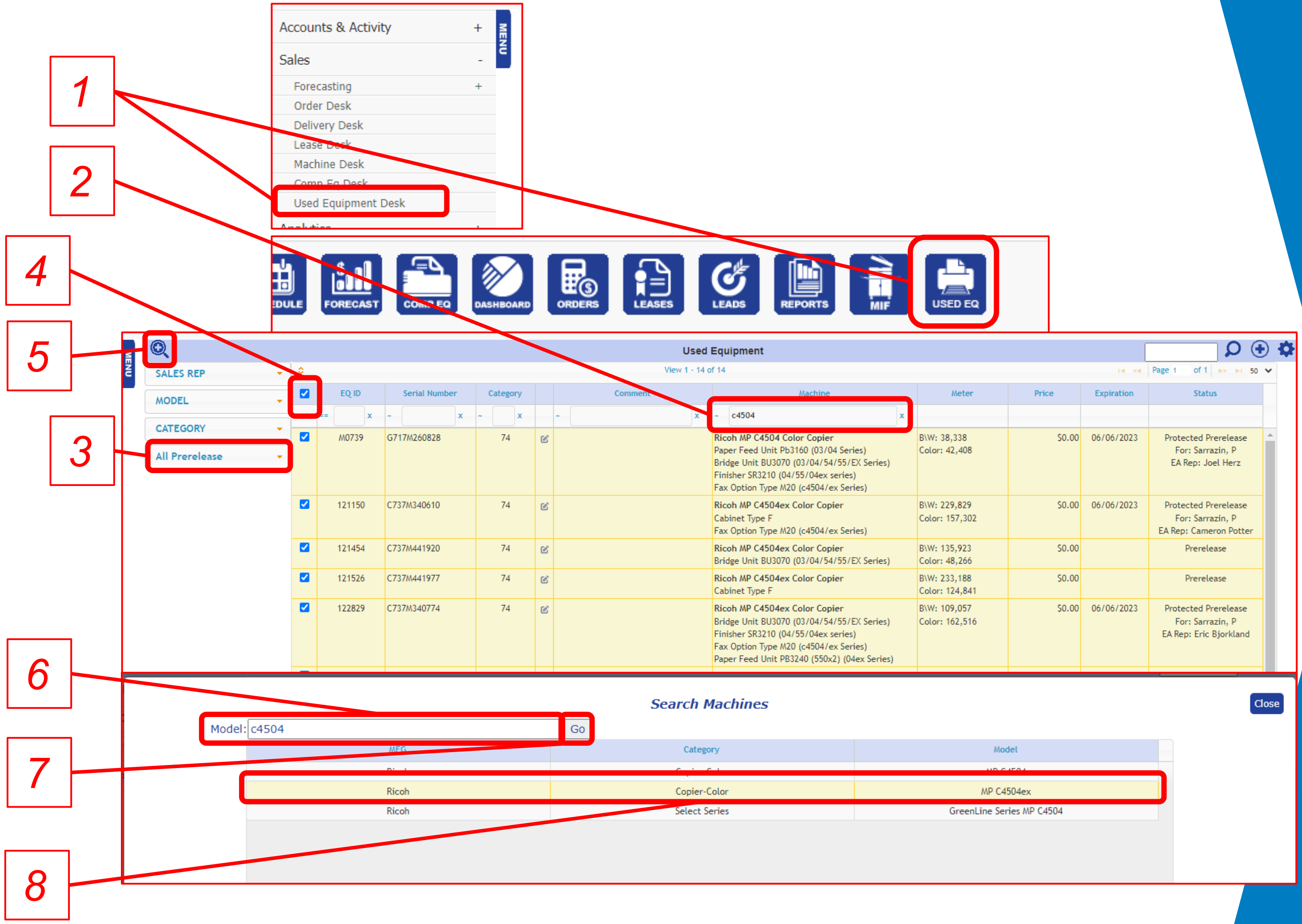
How To: Associate a Pre-Release Item to a Catalog Item

Used machines must be associated with catalog items in order to be added to proposals and orders.

Note: Once this is completed, the UE Status will be set to Available (or Exclusive for protected Machines). Sales reps will then be able to sell those machines.

To associate Pre-Release items to Catalog Items:

1. Navigate to the Used Equipment desk by clicking on Used EQ in your Favorites bar or navigating to *Menu->Sales->Used Equipment Desk*
2. Search for the model you would like to associate with a catalog item in the *Machine* column.
3. Using the dropdown on the left, apply a filter to show only prerelease status.
4. Check the box in the headers section to select all of these machines.
5. Click on the *Assign Catalog Item* icon.
6. Search for the catalog item you would like to associate these machines to. (Usually the same model name).
7. Click *Go*
8. Double click on the correct catalog item to associate these machines.



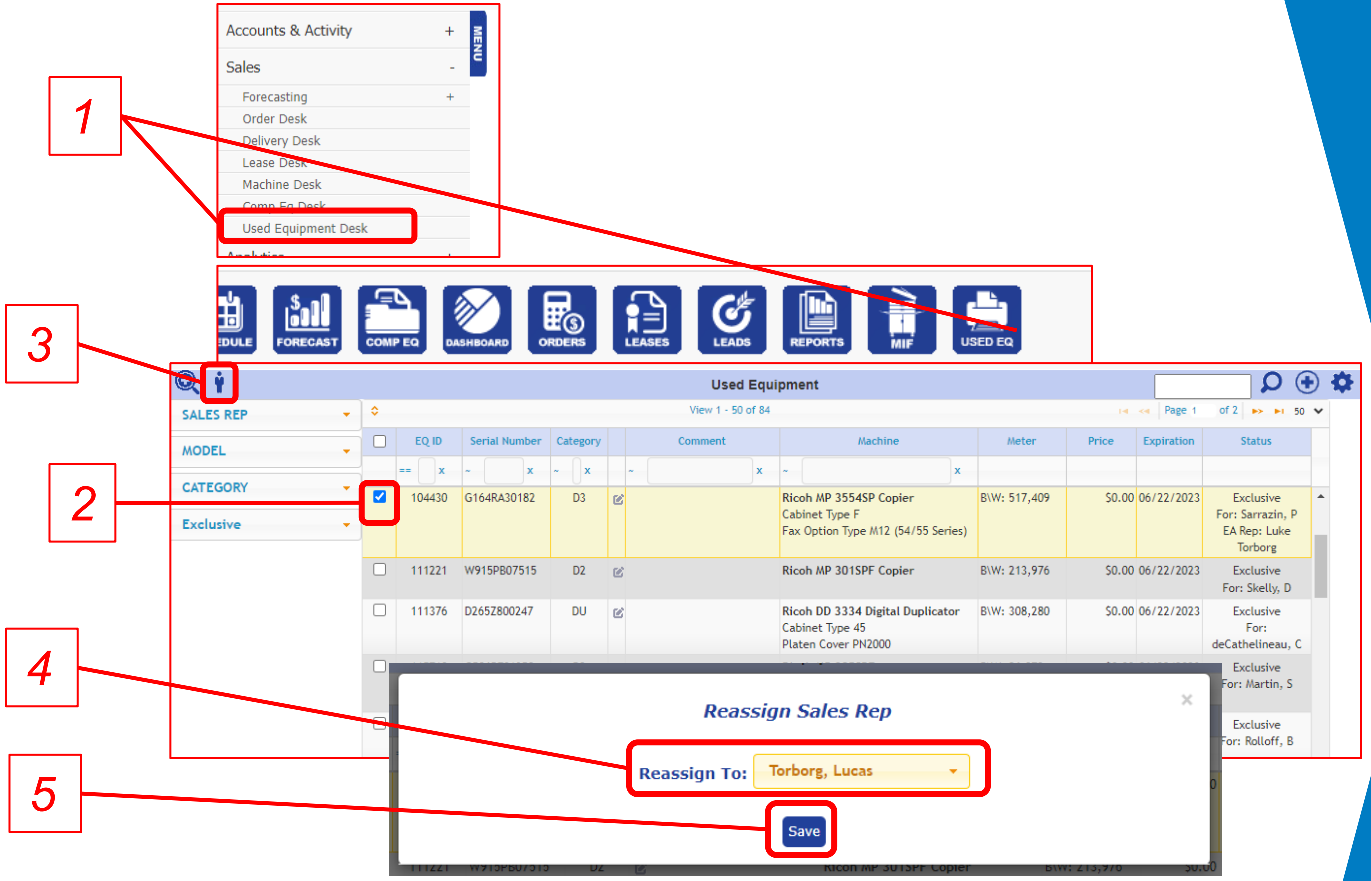
How To: Change the Rep Assigned to Used Equipment

If your business is set up for use of the used equipment desk, it is possible for permissioned users to change the rep who has an exclusive on selling a piece of used equipment.

Important: This is a permissioned action that only certain users will have access to. Consult your system administrator if you believe you should have this ability.

To change the user who has a hold on used machines:

1. Navigate to the Used Equipment desk by clicking on Used EQ in your Favorites bar or navigating to *Menu->Sales->Used Equipment Desk*
2. Check the box in the headers section to select all of these machines.
3. Click the *Reassign Machines* icon.
4. In the pop-up dialogue, use the drop-down menu to select the appropriate rep.
5. Click *Save.*



Quick Tip:

The rep on the exclusive machines is a text field in e-Automate, so if there is a typo or SalesChain can't find a user to match for any other reason, the system will assign the machine to a default rep configured in SalesChain. This is to avoid any exclusive machines with no rep assignment.

Account View: The Sales Tab

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

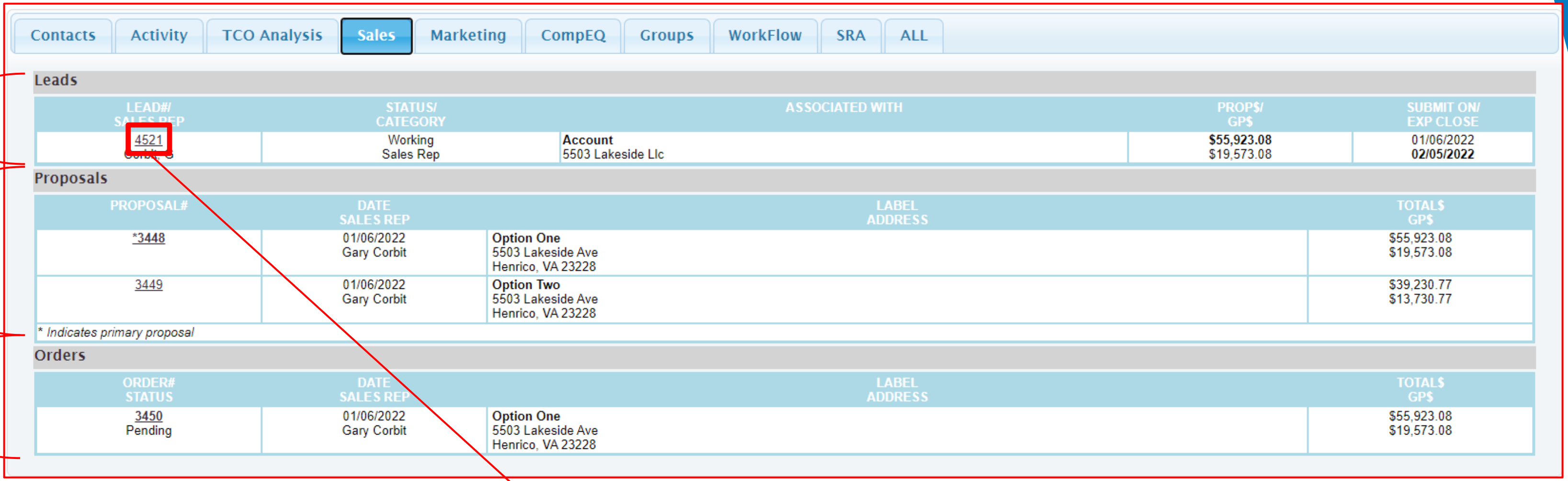
Key:

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

1

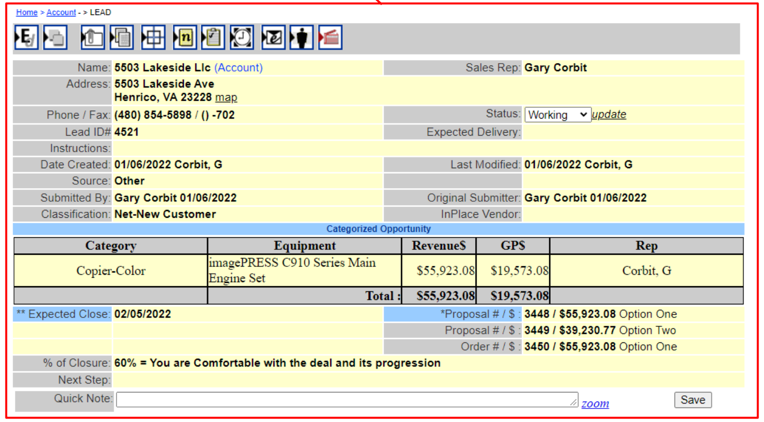
2

3



Quick Tips:

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



Tabs in the Order Breakdown

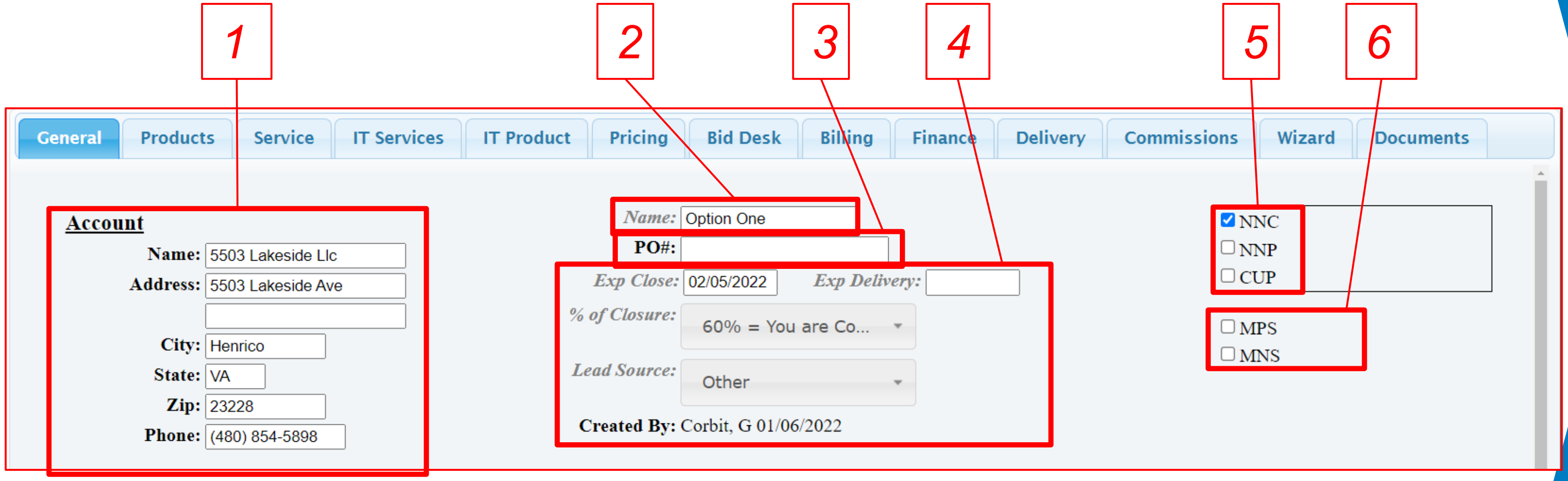
Tab	Page Number	Description
General	94	Enter basic account and lead information
Products	95	Add, edit or remove product bundles
Service	101	Configure various service contract options
IT Services	108	Add, edit or remove IT services offerings
IT Product	111	Add, edit or remove any IT product bundles
Pricing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



Quick Tips:

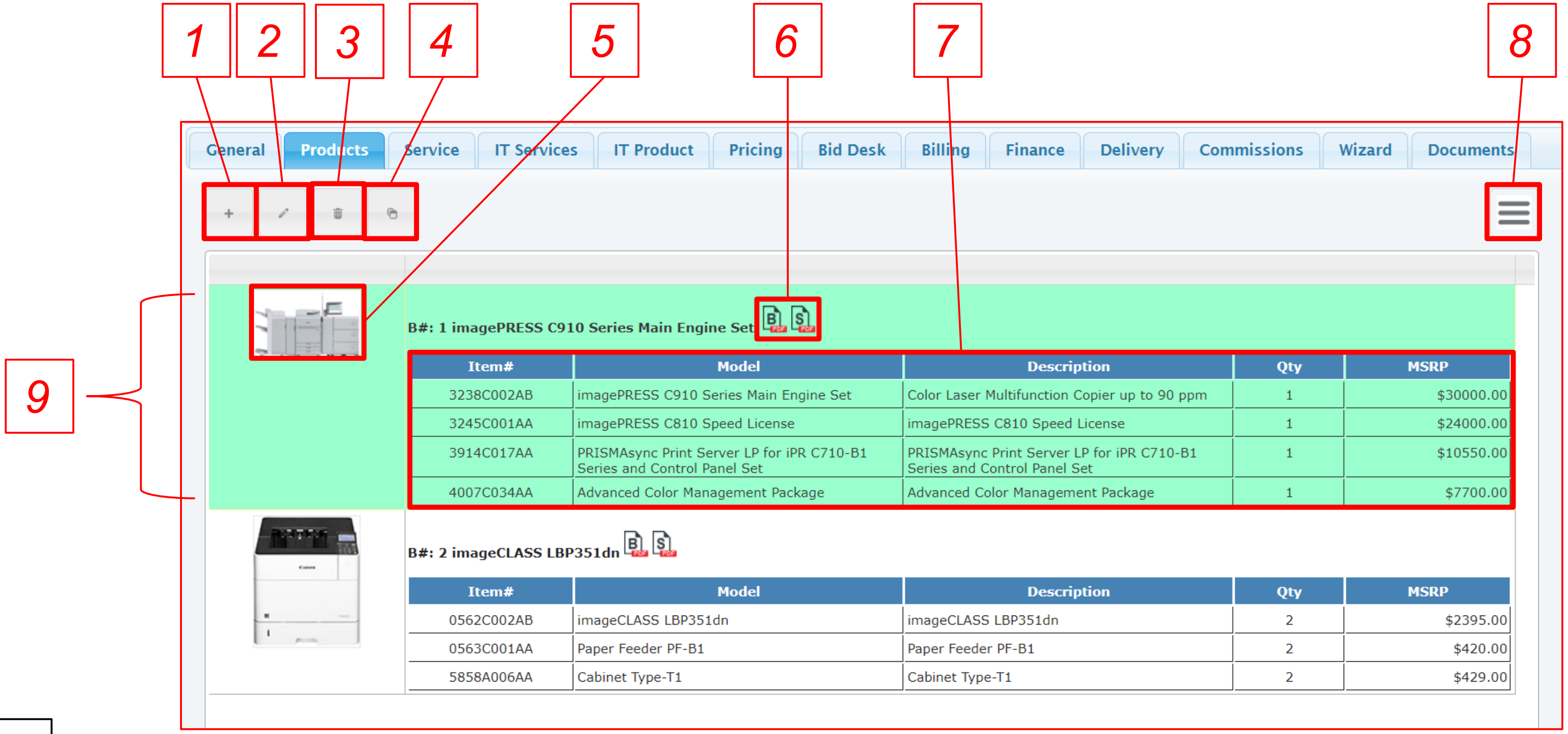
- Information that is changed in this screen may need to be saved. If the save button flashes red (as in the image to the right) you have changes that are unsaved.
- The red save button serves to indicate that information being saved will make changes not only to this proposal/order but also to other 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 108.
9) Click on a bundle to select it. Selected bundles will turn green (as shown).



Quick Tip:

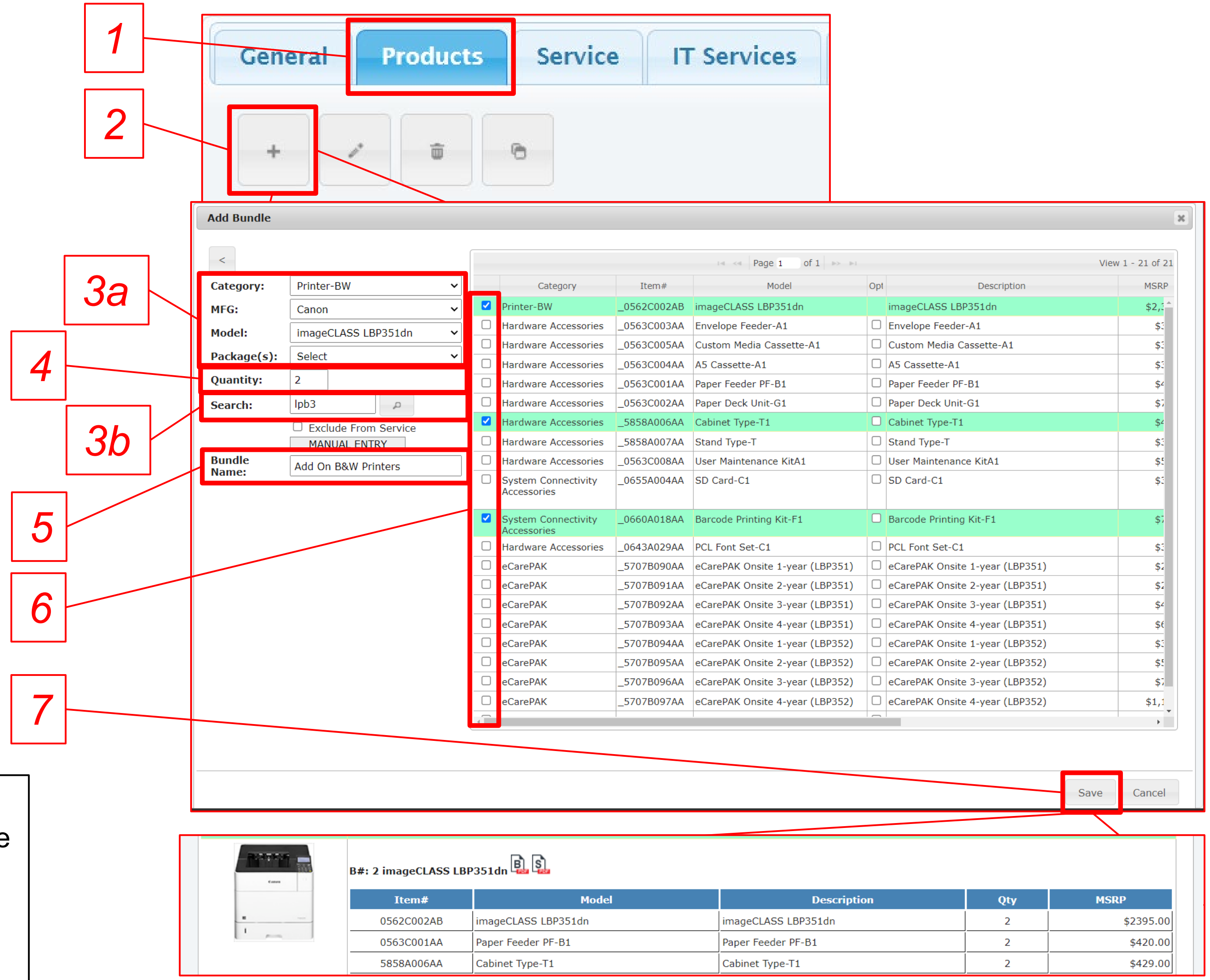
Each *bundle* represents a mainframe and its accessories. It is possible to have a quantity of more than one of this bundle, representing multiple machines with identical configurations.

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:

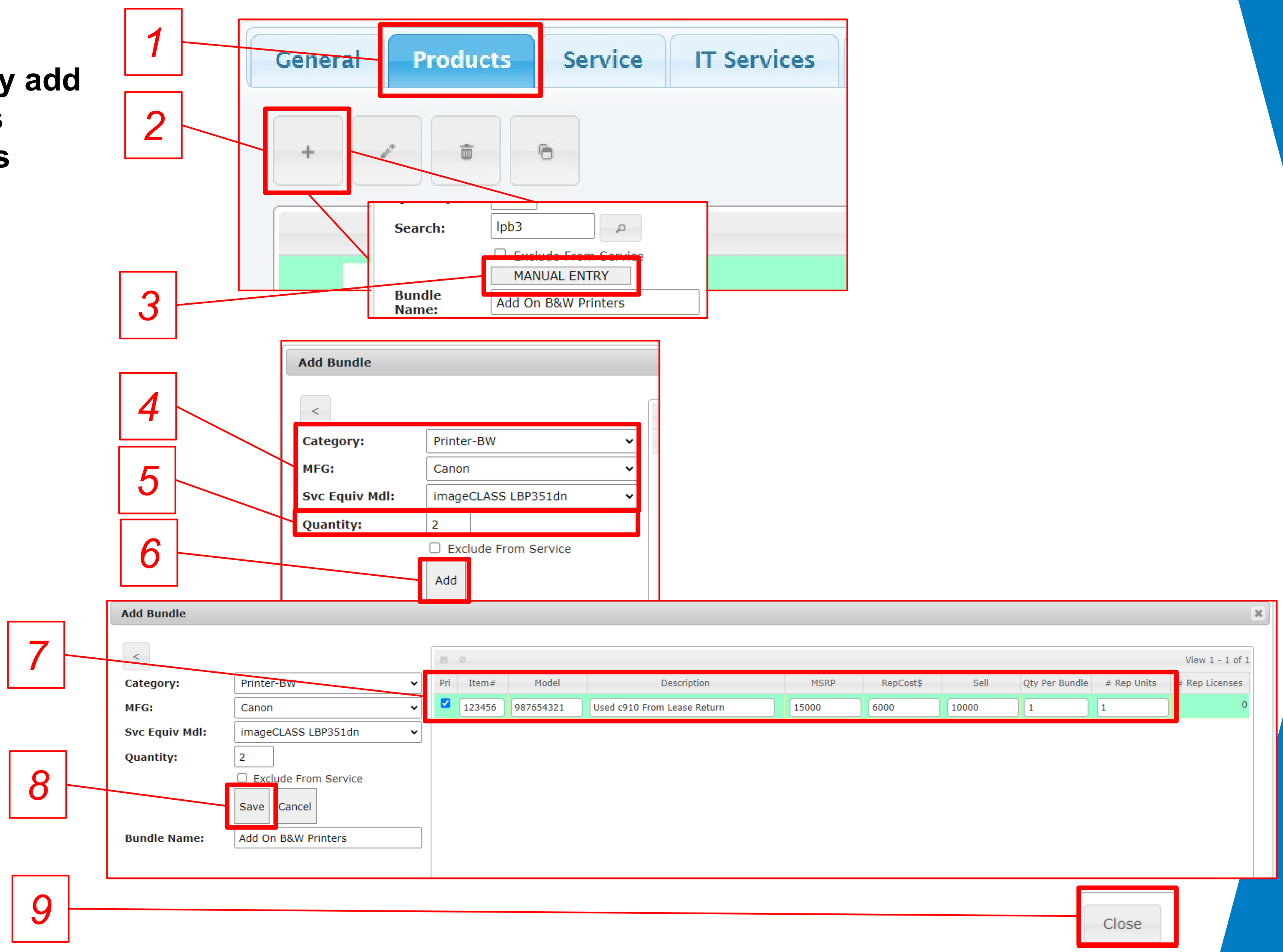
- The *Opt* column of checkboxes allows you to select optional accessories which can be priced at their incremental upgrade value using the wizard tab. See page 161 - 162 for how to include optional upgrades on your proposal.
- Use the < button at the top left to hide the sidebar and view more of the accessories table.

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:

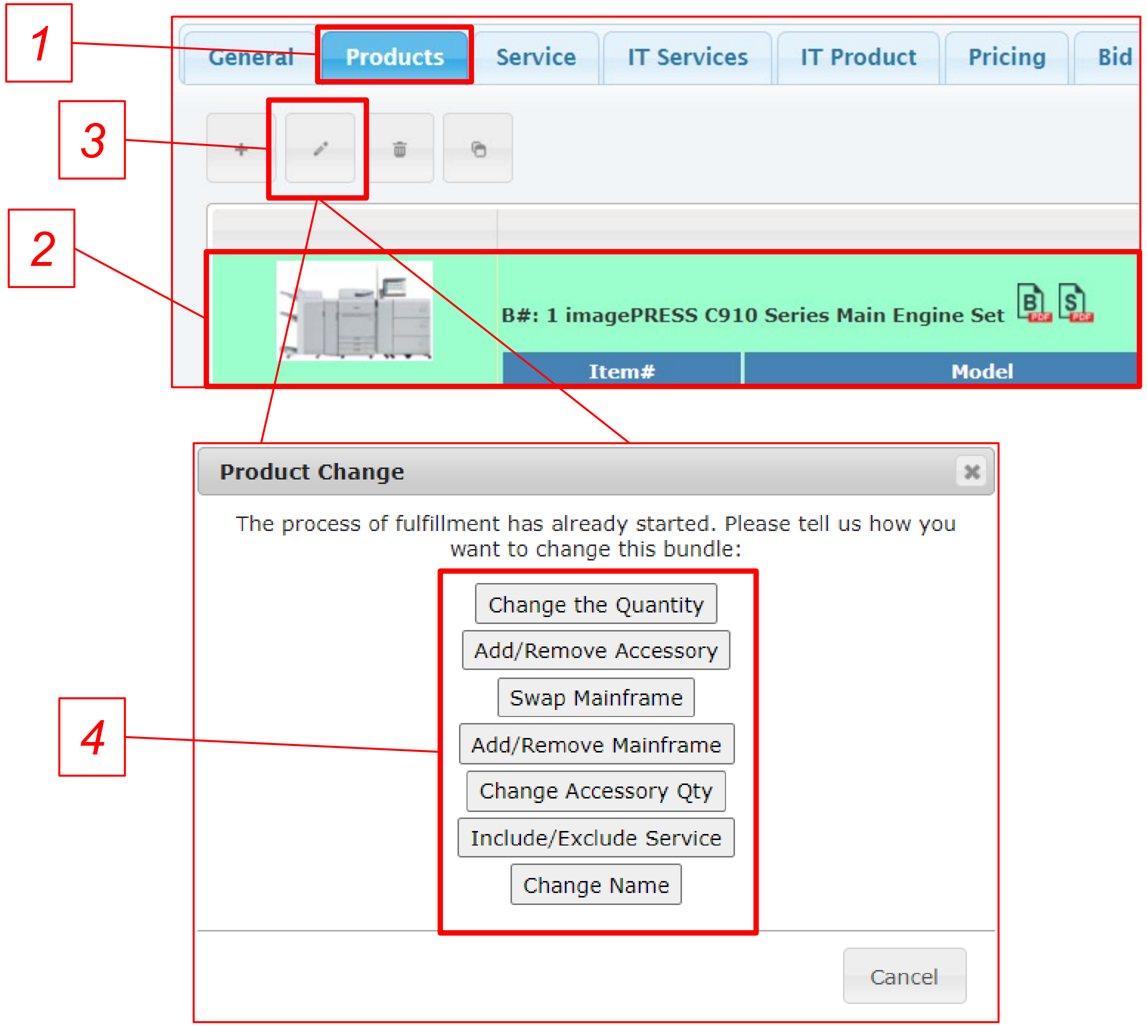
Manual printers and copiers require the input of a service-equivalent machine. If this manual item does not require service (e.g., software) then check the box next to "exclude from service".

How To: Edit a Bundle

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

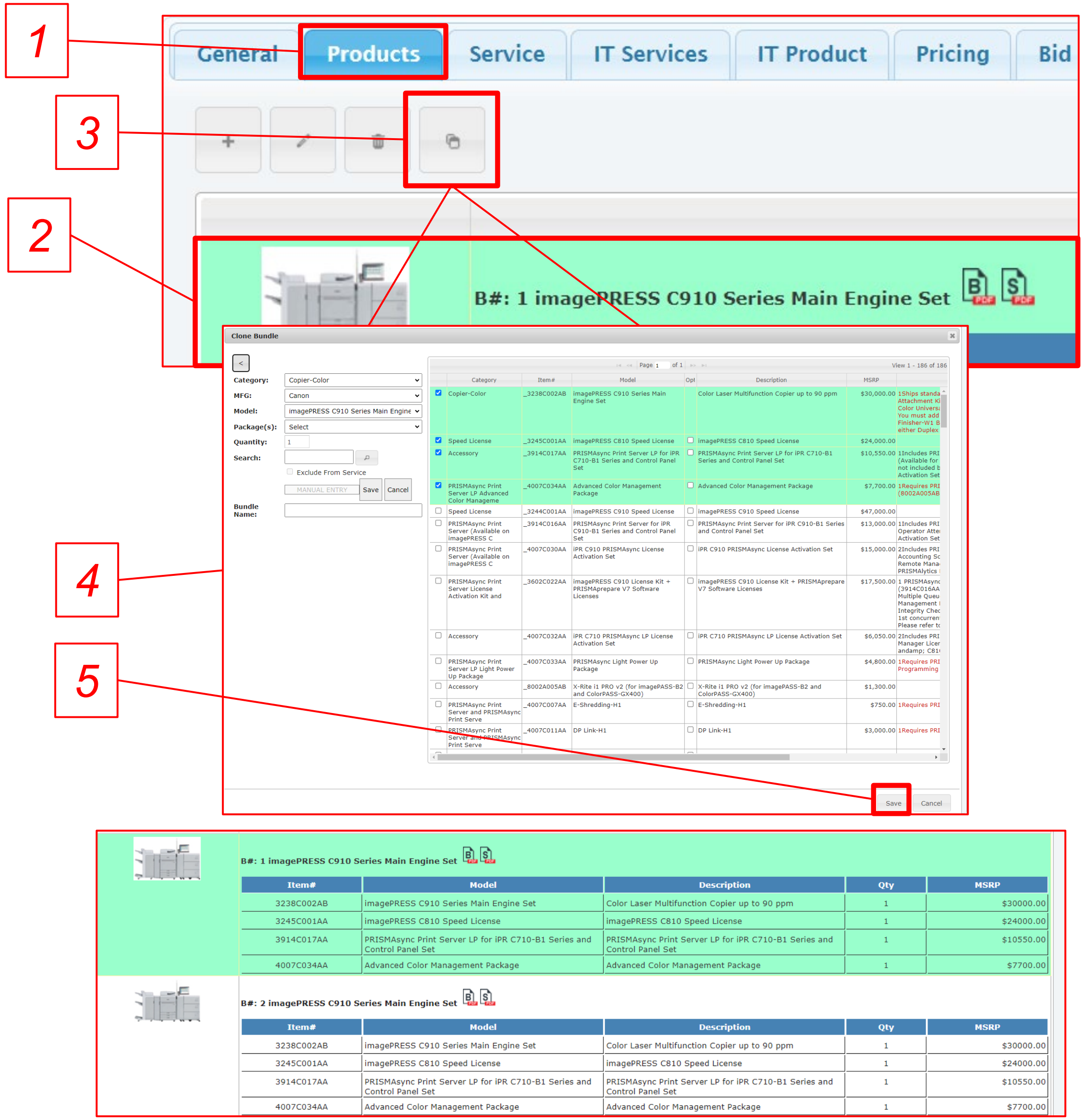


How To: Clone a Bundle

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

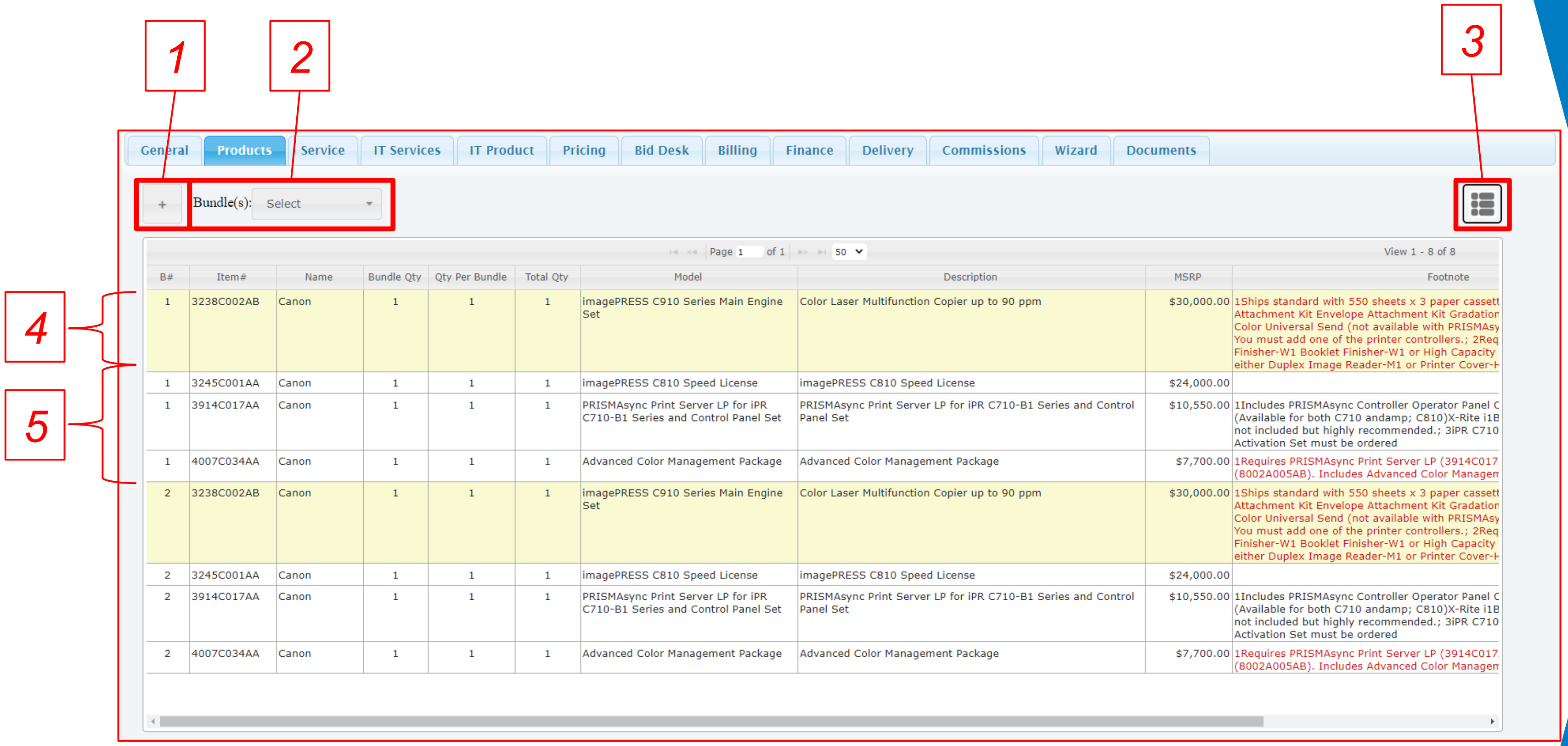
To clone a bundle:

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*



The Line-Item View

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



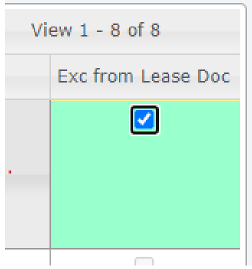
B#	Item#	Name	Bundle Qty	Qty Per Bundle	Total Qty	Model	Description	MSRP	Footnote
1	3238C002AB	Canon	1	1	1	imagePRESS C910 Series Main Engine Set	Color Laser Multifunction Copier up to 90 ppm	$30,000.00	1Ships standard with 550 sheets x 3 paper cassett Attachment Kit Envelope Attachment Kit Gradation 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-H
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 Managem
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 cassett 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-H
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 Managem

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 102)
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.

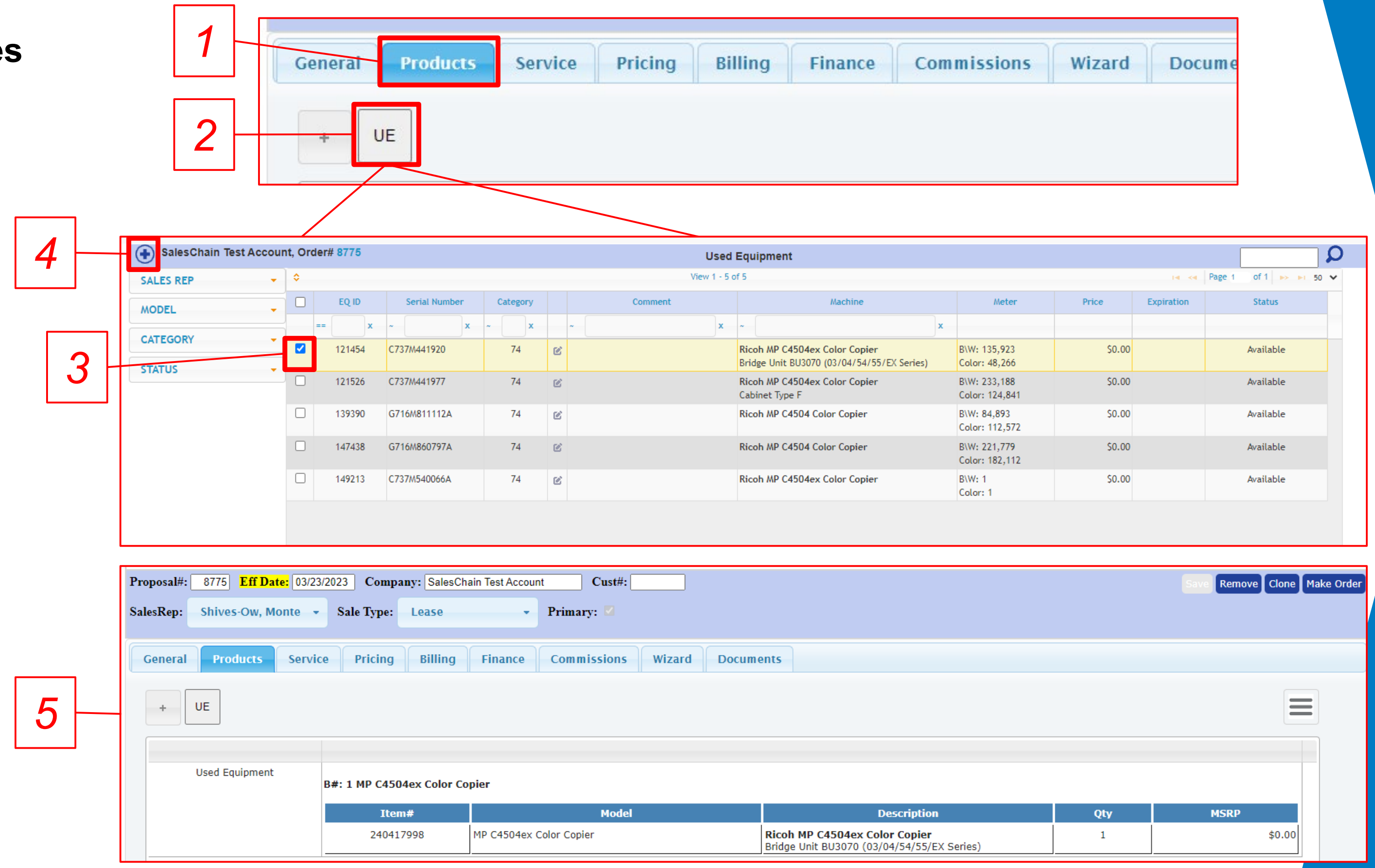


How To: Add Used Equipment to a Proposal or Order

If your business is set up for use of the used equipment desk, it is possible to add use machines to your proposals and orders.

To add used machines to your deal:

1. Navigate to the *Products* tab of your desired proposal or order
2. Click the *UE* button to view available used machines in the used equipment desk. *Note: You will see your proposal or order number listed in the top left.*
3. Select the machine you would like to add to your proposal or order using the corresponding check box.
4. Click the *add to proposal or order* button.
5. You will be redirected to your proposal or order and the used machine will be added to your products tab.



Quick Tip:

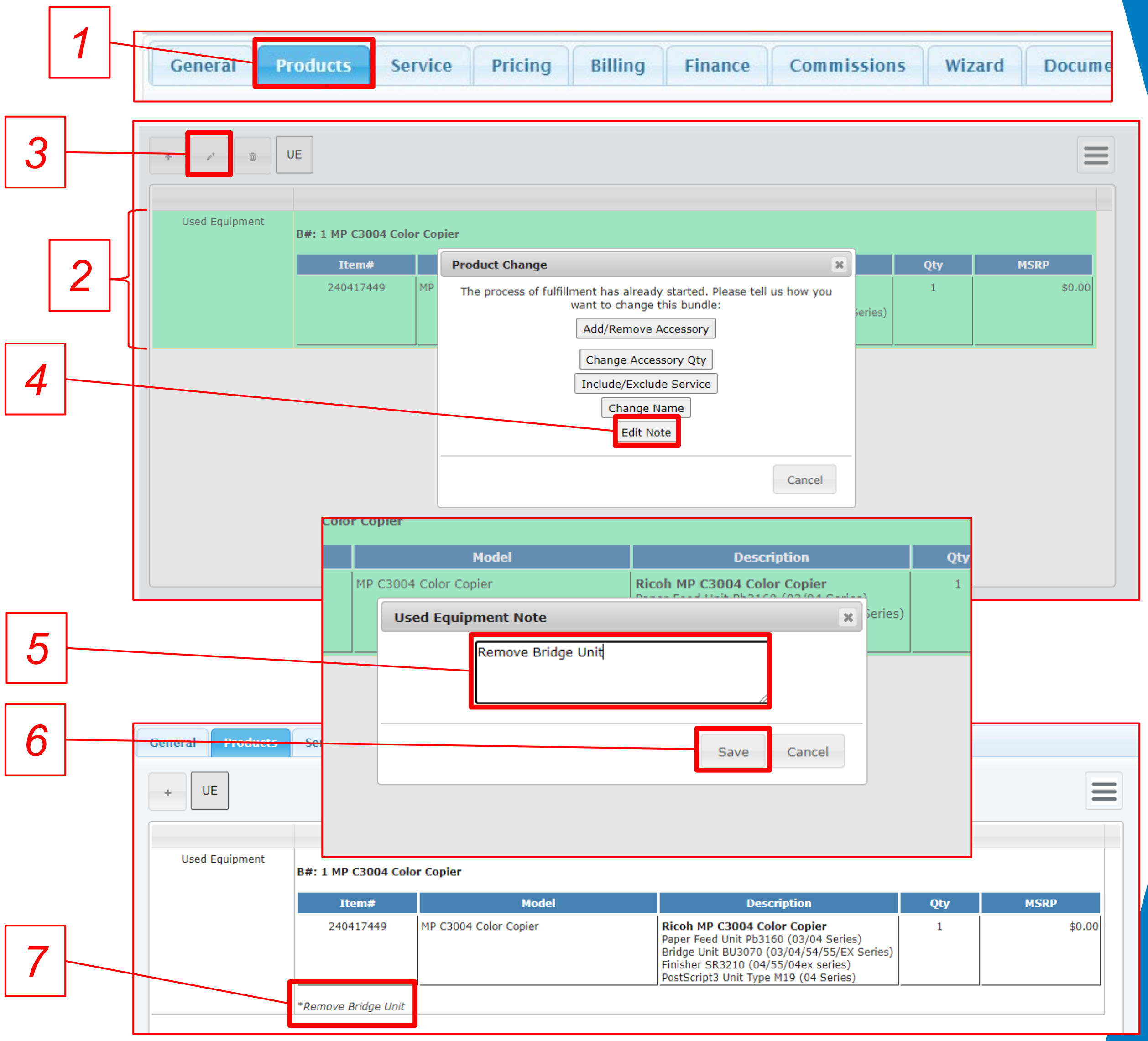
The used equipment desk requires additional system configuration, if you do not see the *UE* button (Step 2), you may still add used equipment manually via the method outlined on Page 103.

How To: Add a Note to a Used Equipment Bundle

If your business is set up for use of the Used Equipment Desk, it is possible to add a note to used equipment bundles that have been added to proposals or orders.
Note: This note is usually used to request changes to the used machine's configuration.

To add a note to a used machine's bundle:

1. Navigate to the *Products* tab of your desired proposal or order
2. Click on the used equipment bundle to highlight it in green.
3. Click the *Edit* button
4. In the pop-up dialogue, select *Edit Note. Note: This option is exclusive to used equipment bundles.*
5. Enter your desired note in the pop-up.
6. Click *Save*
7. Your note will appear below the table of this bundle.

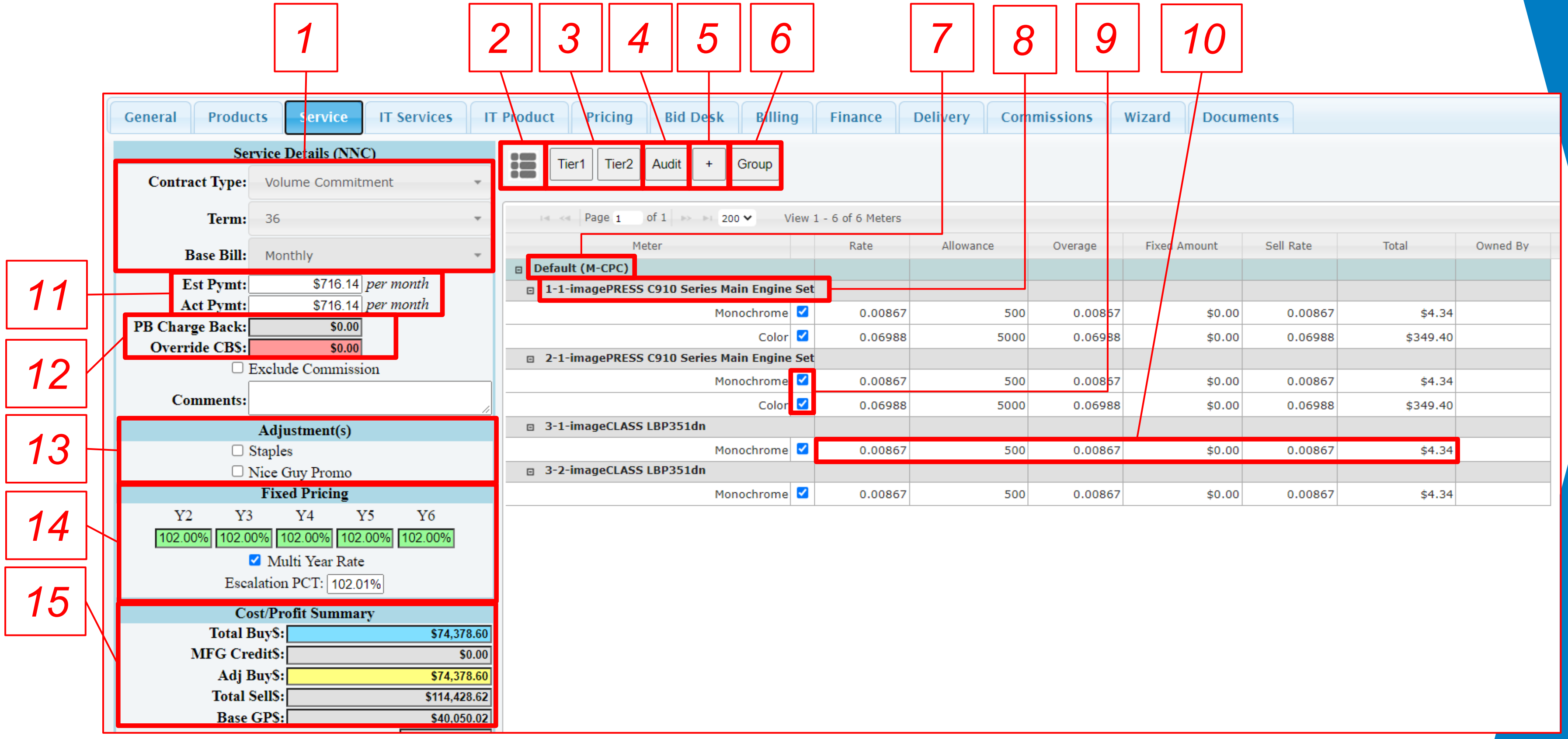


Proposal and Order Pricing: The Service Tab

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 106)
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
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

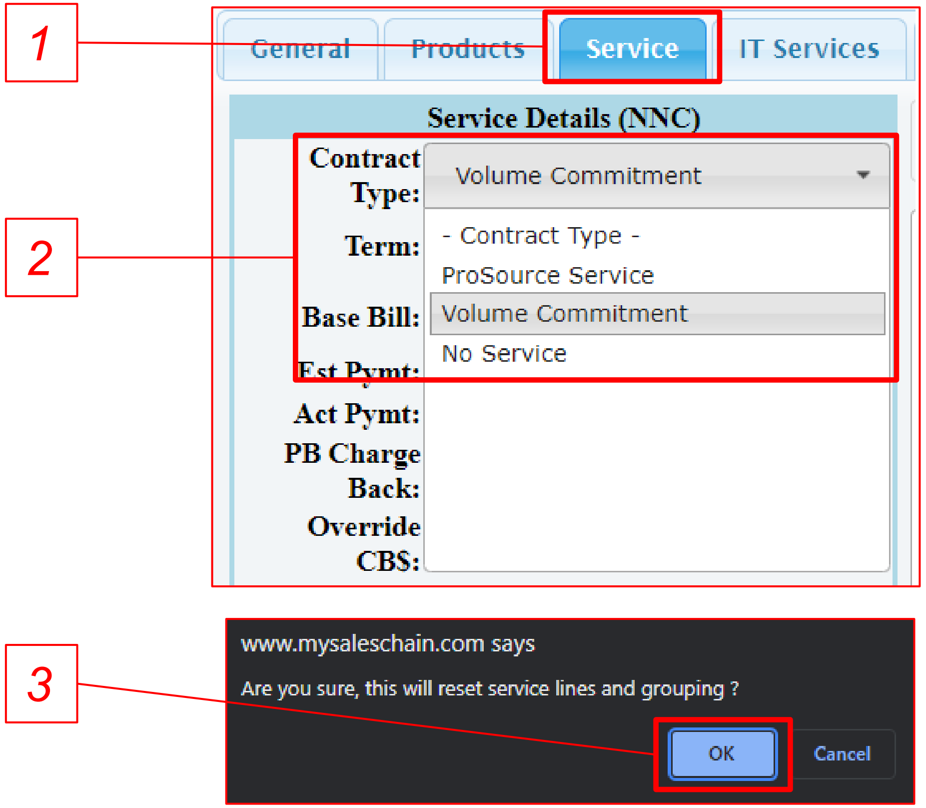


Service Tab Vocabulary

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

Quick Tip:

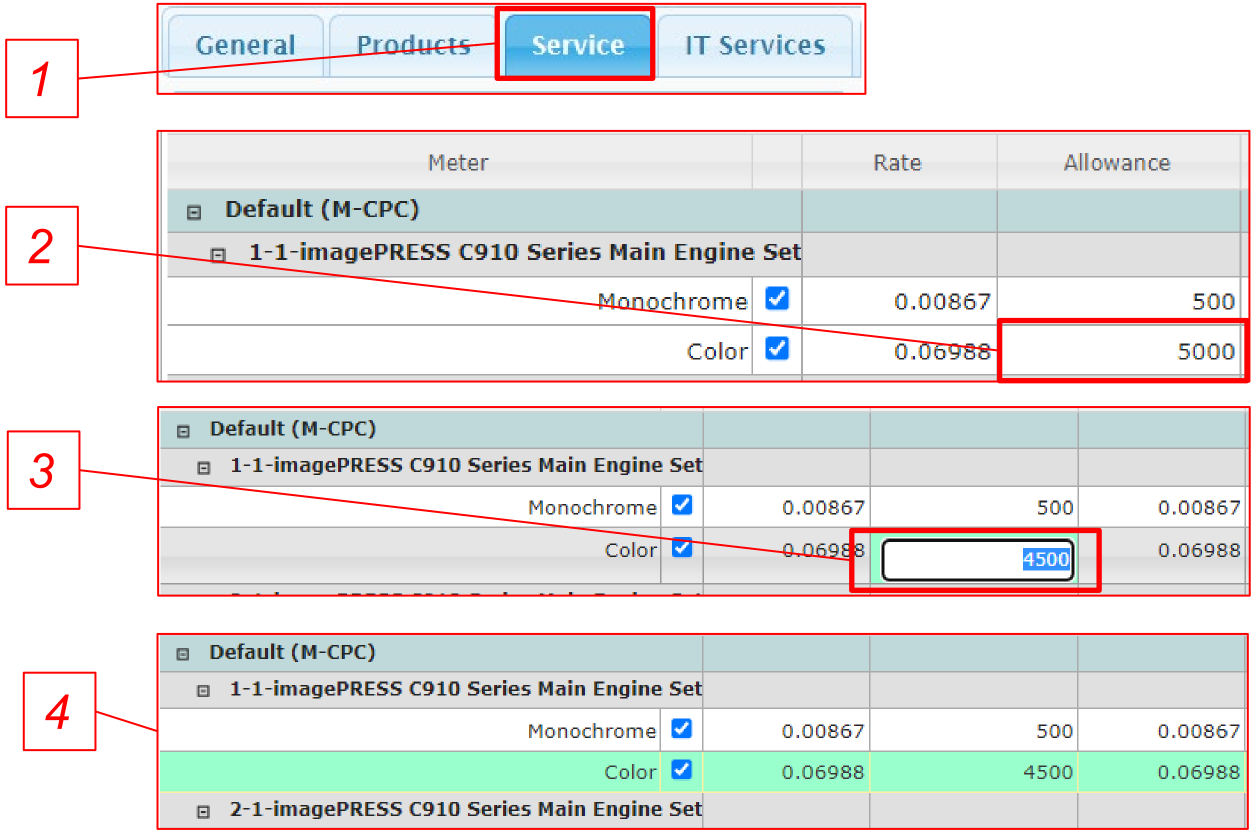
You may see changes take effect across the service screen. For example, CPC contracts will un-check all the volume commitment boxes, *no service* will remove all line items entirely.

How To: Change Service Rates, Allowances, and Overages

It is possible to change rates, allowances and overages in the service tab table. See page 110 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:

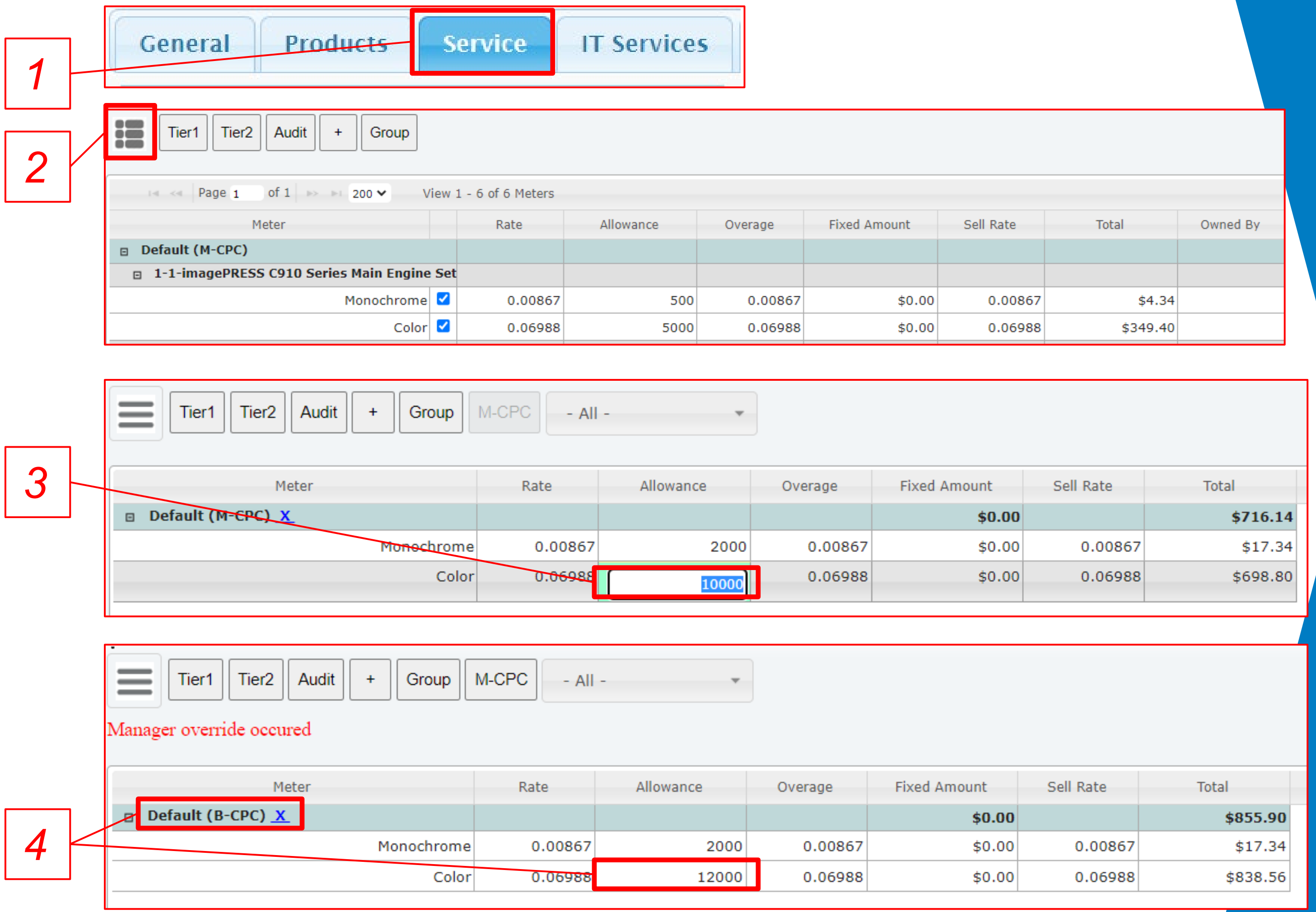
If you have blended your service rates between multiple machines, you will not be able to edit machine level allowances. See page 113 for how to blend and remove blending from your service contract.

How To: Price Blended Service

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

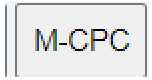
To price blended service:

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

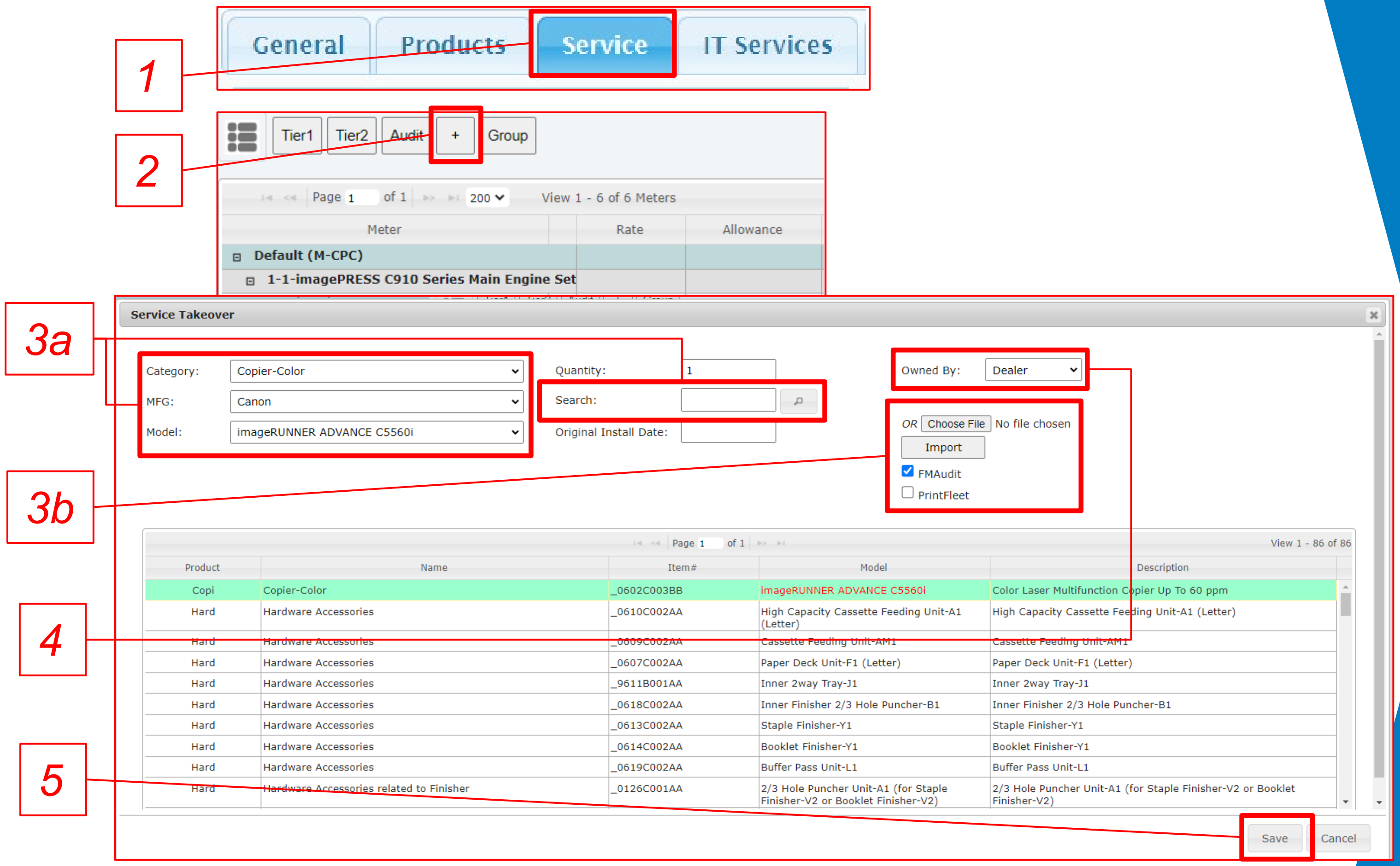


Quick Tip:

- 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.



How To: Price a Service Takeover



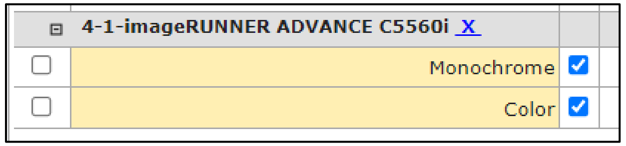
It is possible to add a service contract without adding a machine to the deal (zero cost service) using the service tab in the order breakdown.

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*

Quick Tip:

Service takeovers will be highlighted in yellow.

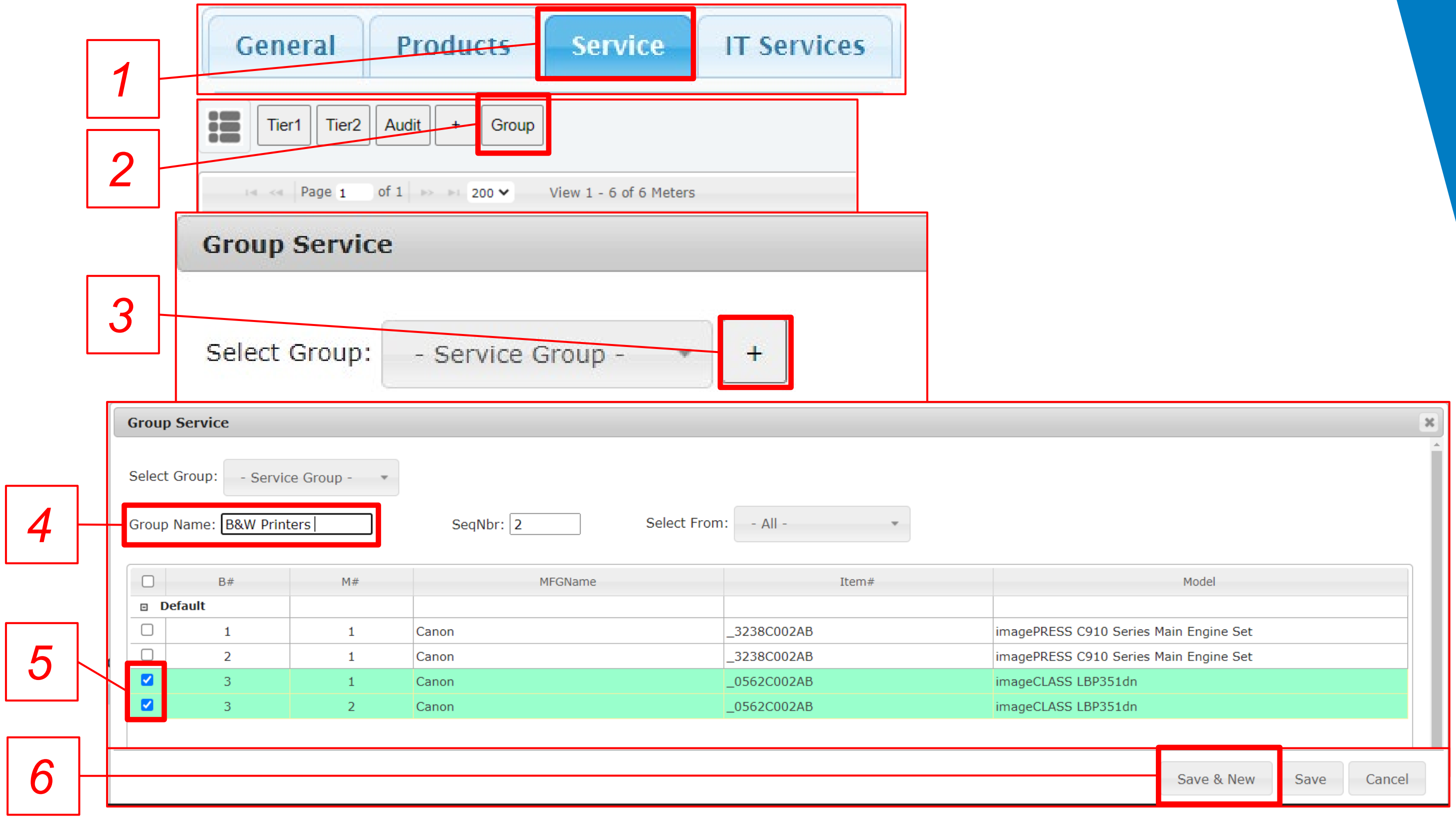


How To: Group Machines for Service

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

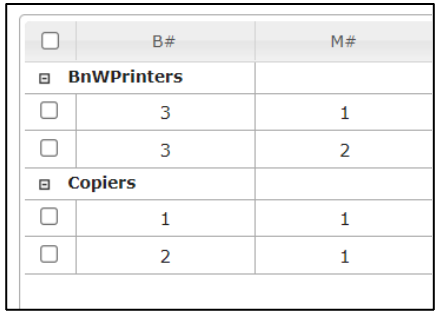
To create service groups:

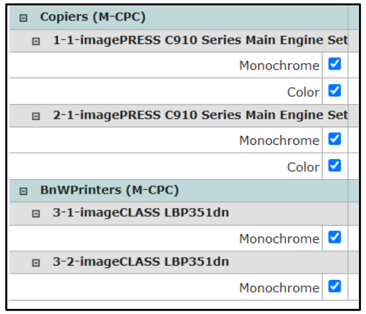
1. Navigate to the *Service* tab
2. Click the *Group* button
3. In the *group service* dialogue box, click the *New Group* button
4. Enter a name for this new group
5. Select the machines that should be added to this new group
6. Click *Save & New*
7. Repeat steps 3-6 for as many groups as you would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



Quick Tip:

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



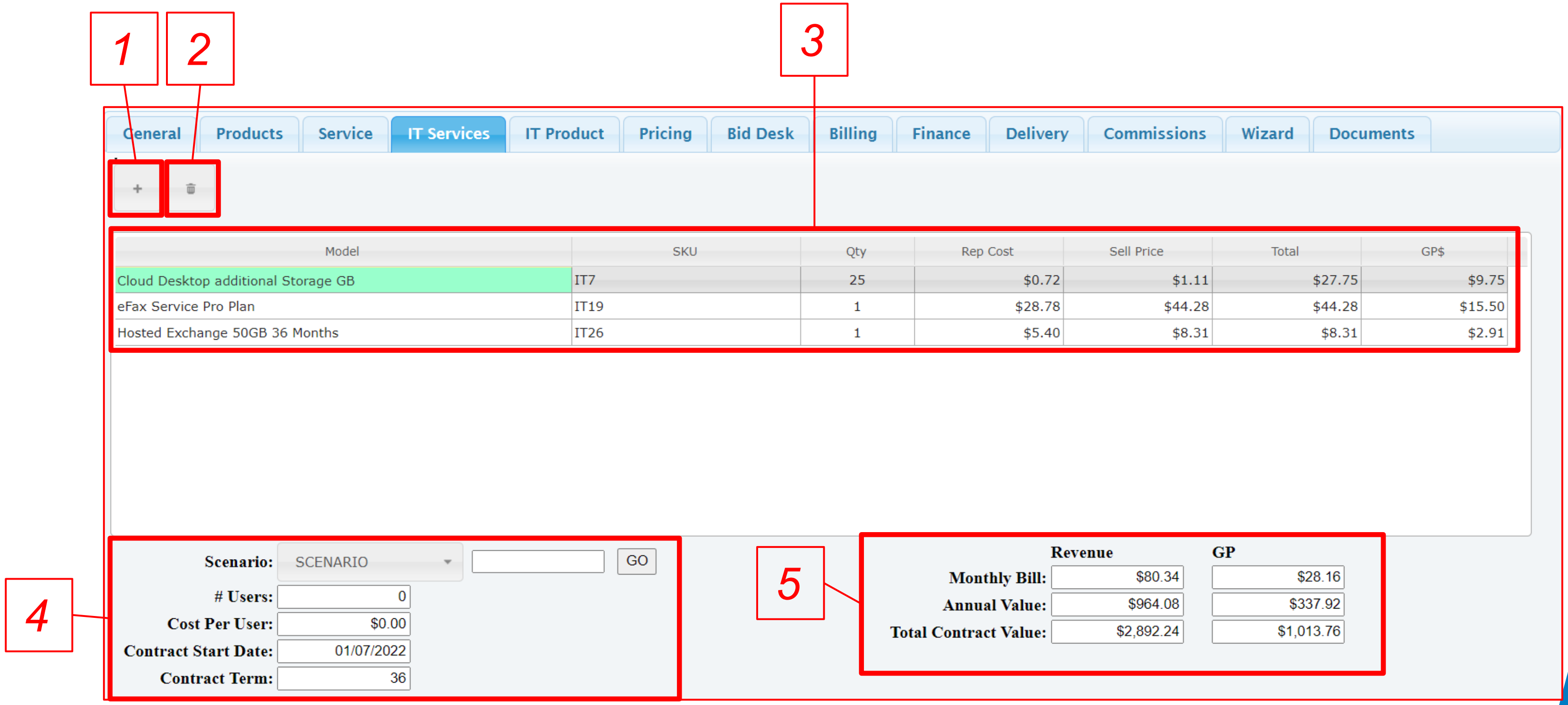


Proposal and Order Pricing: The IT Services Tab

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

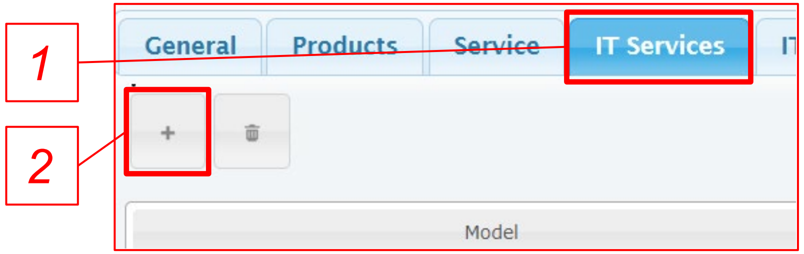


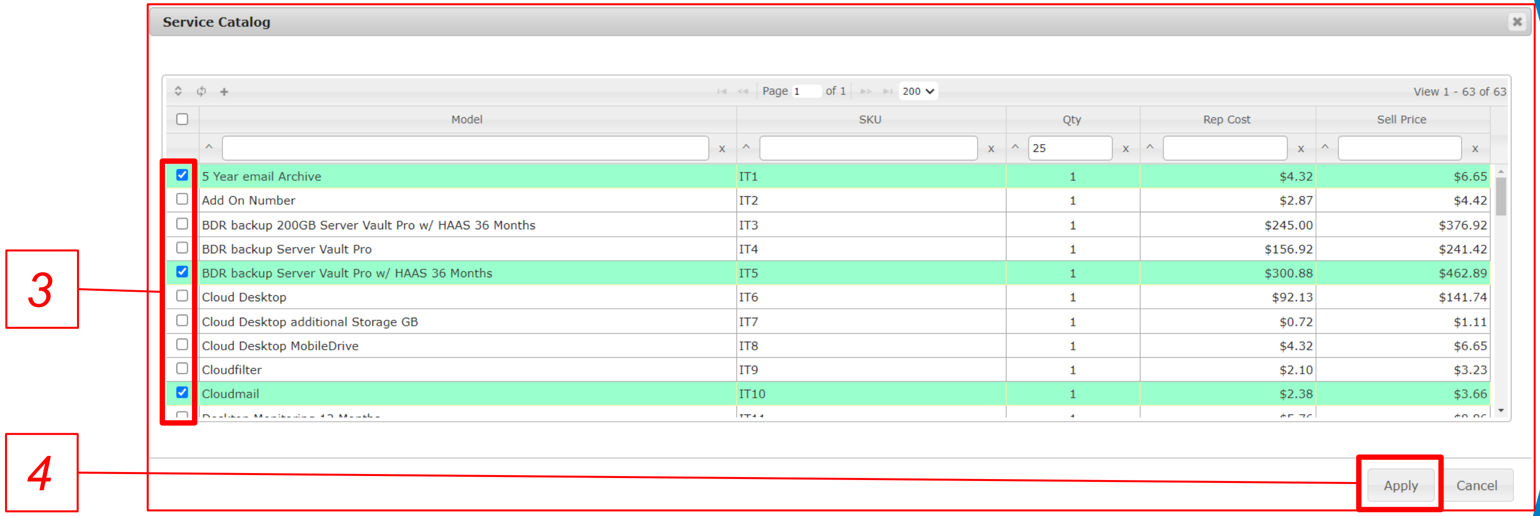
How To: Add IT Services To A Proposal or Order

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:

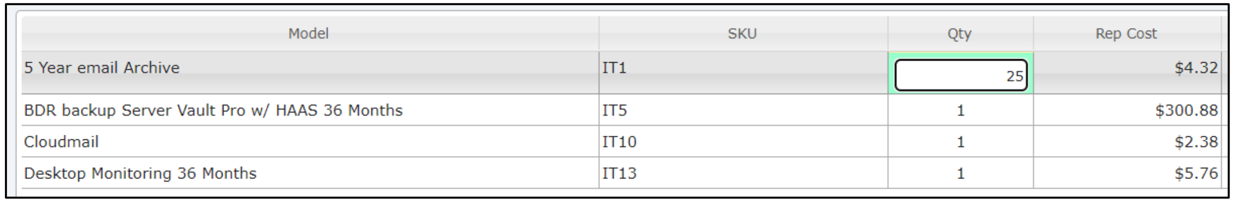
1. Navigate to the *IT Services* Tab
2. Click the *Add IT Services* button
3. Select the services you would like to add using the check boxes
4. Click *Apply*





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.

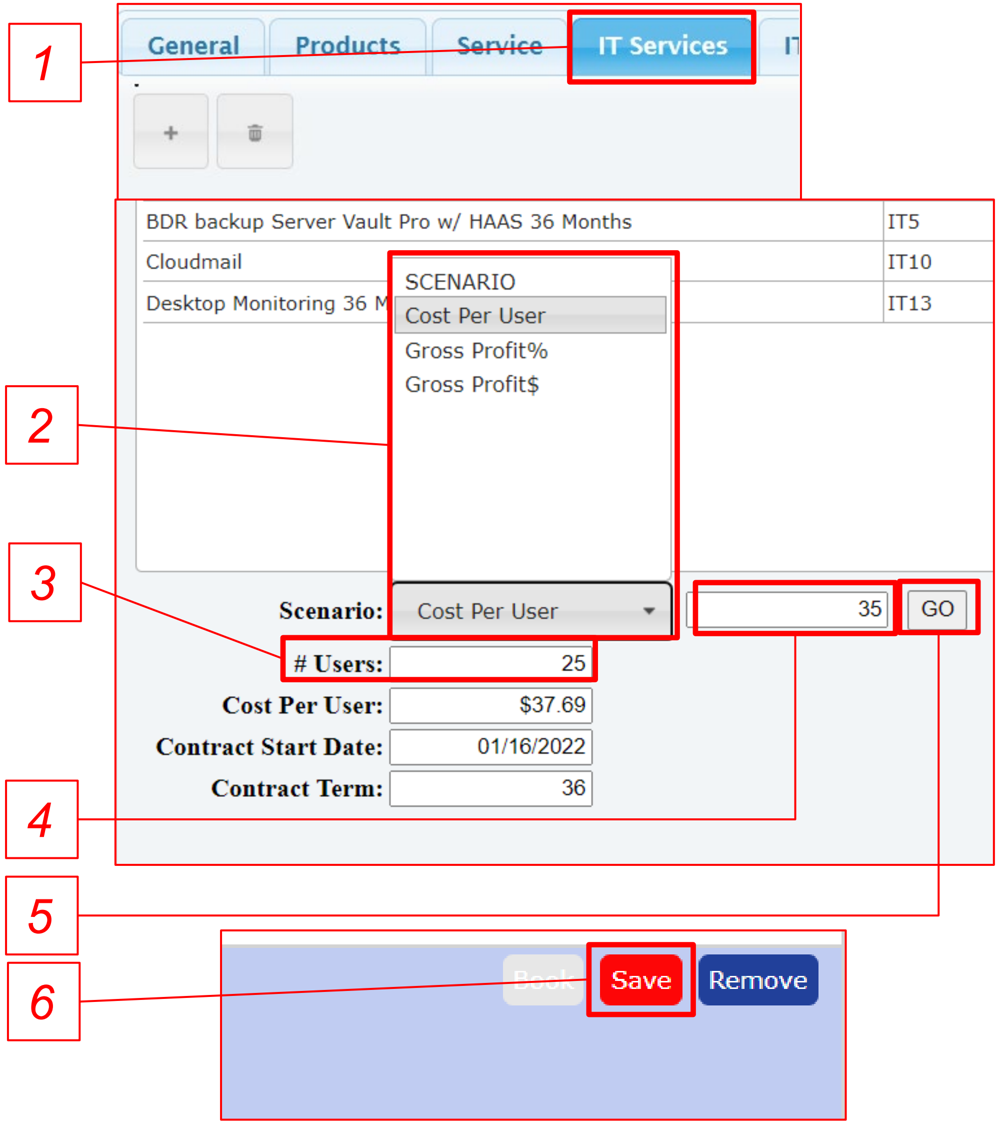


How To: Scenario Pricing in the IT Services Tab

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.



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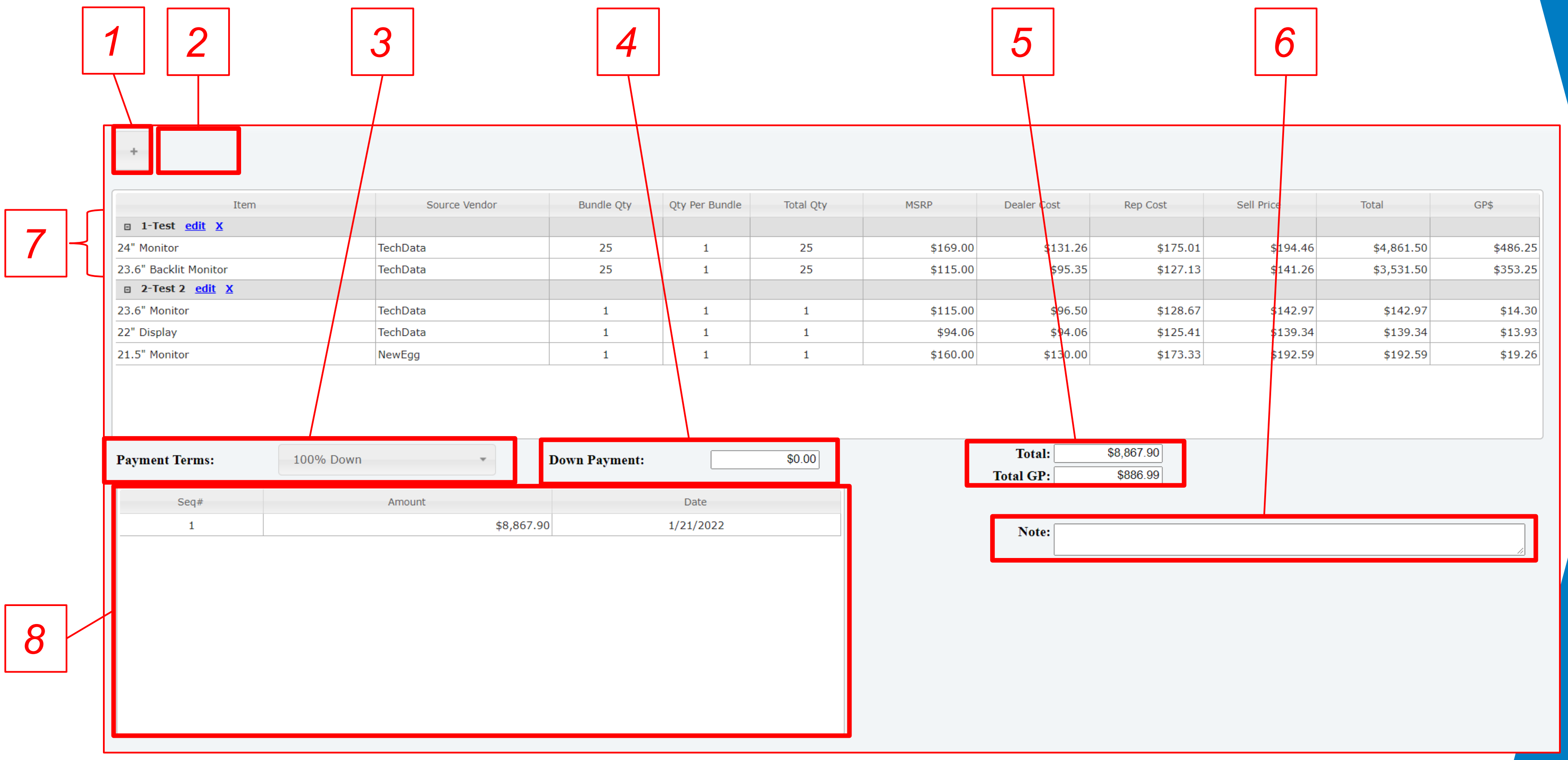
Proposal and Order Pricing: The IT Products Tab

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



Proposal & Order Pricing: Pricing Tab

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

Key:

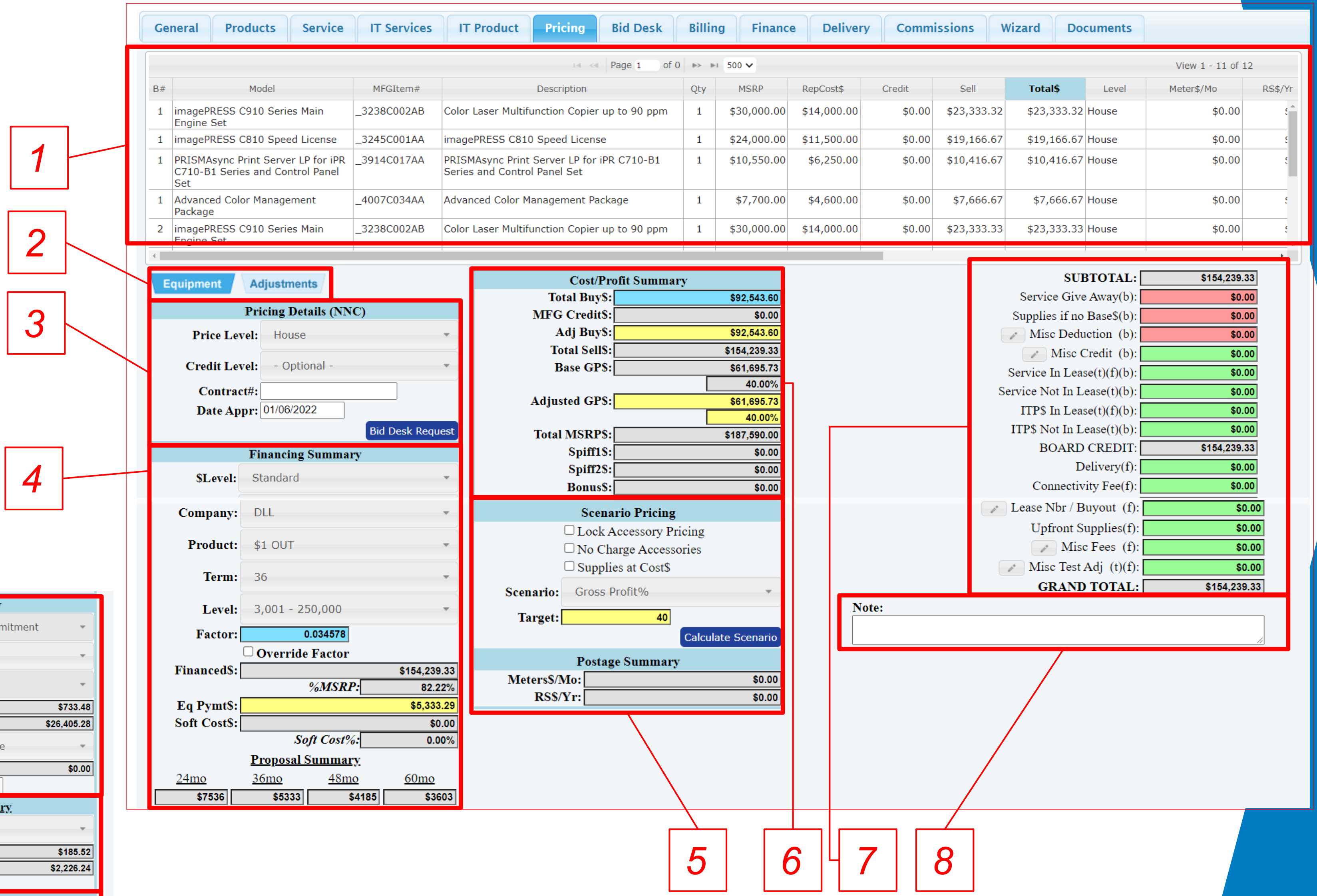
1) Equipment or Adjustments Summary Table
2) Select Equipment or Adjustments View
3) Pricing Details
4) Financing Summary
5) Scenario Pricing Tool
6) Cost/Profit Summary
7) Soft costs (entry and Summary)
8) Add a note to this deal (Internal Only)

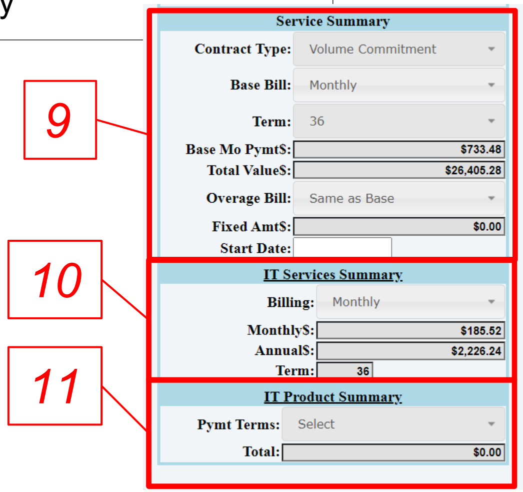
-- Scroll Down on Page ---

9) Service Summary
10) IT Services Summary
11) IT Products Summary

Quick Tip:

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



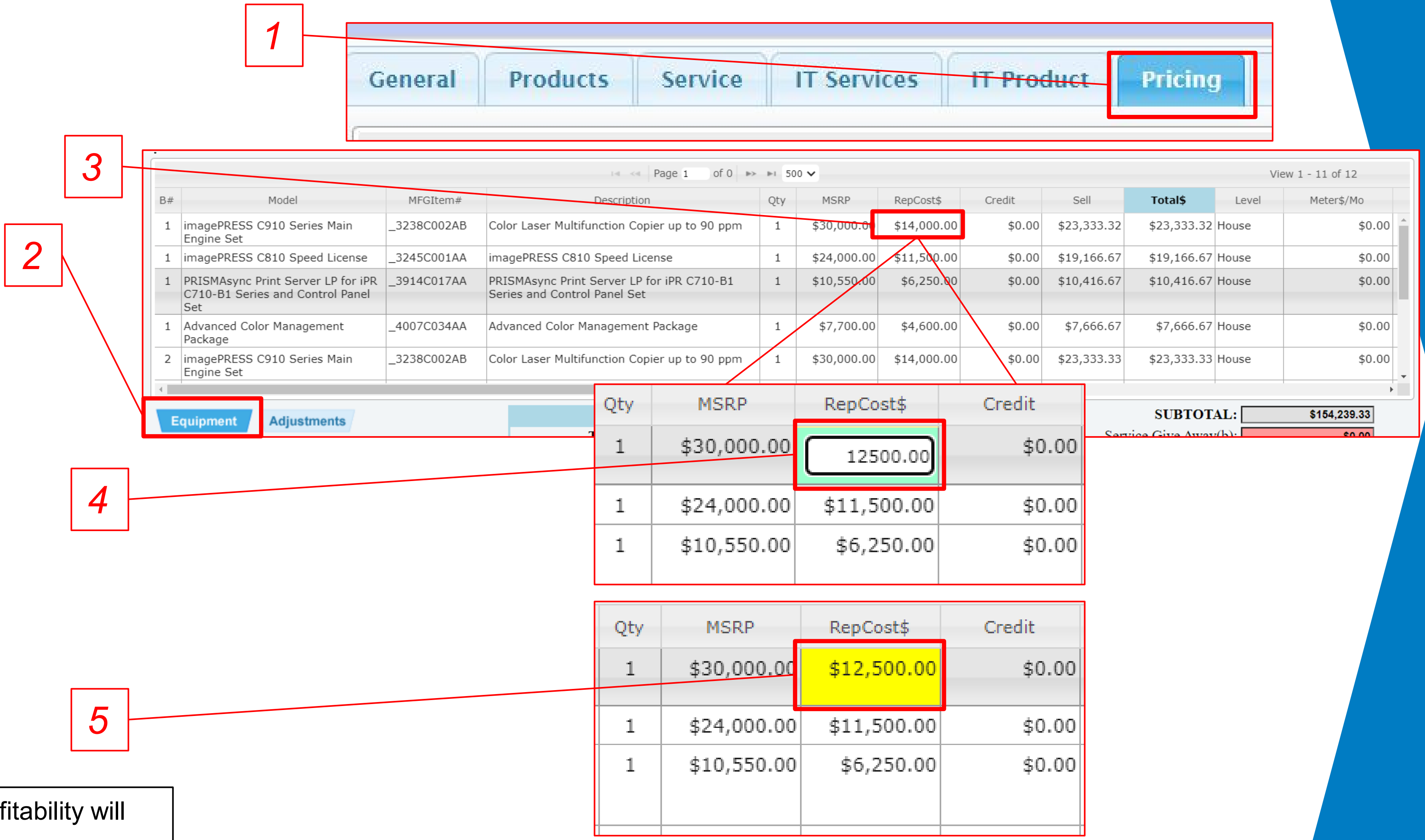


How to: Change Values in the Equipment Subtab

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



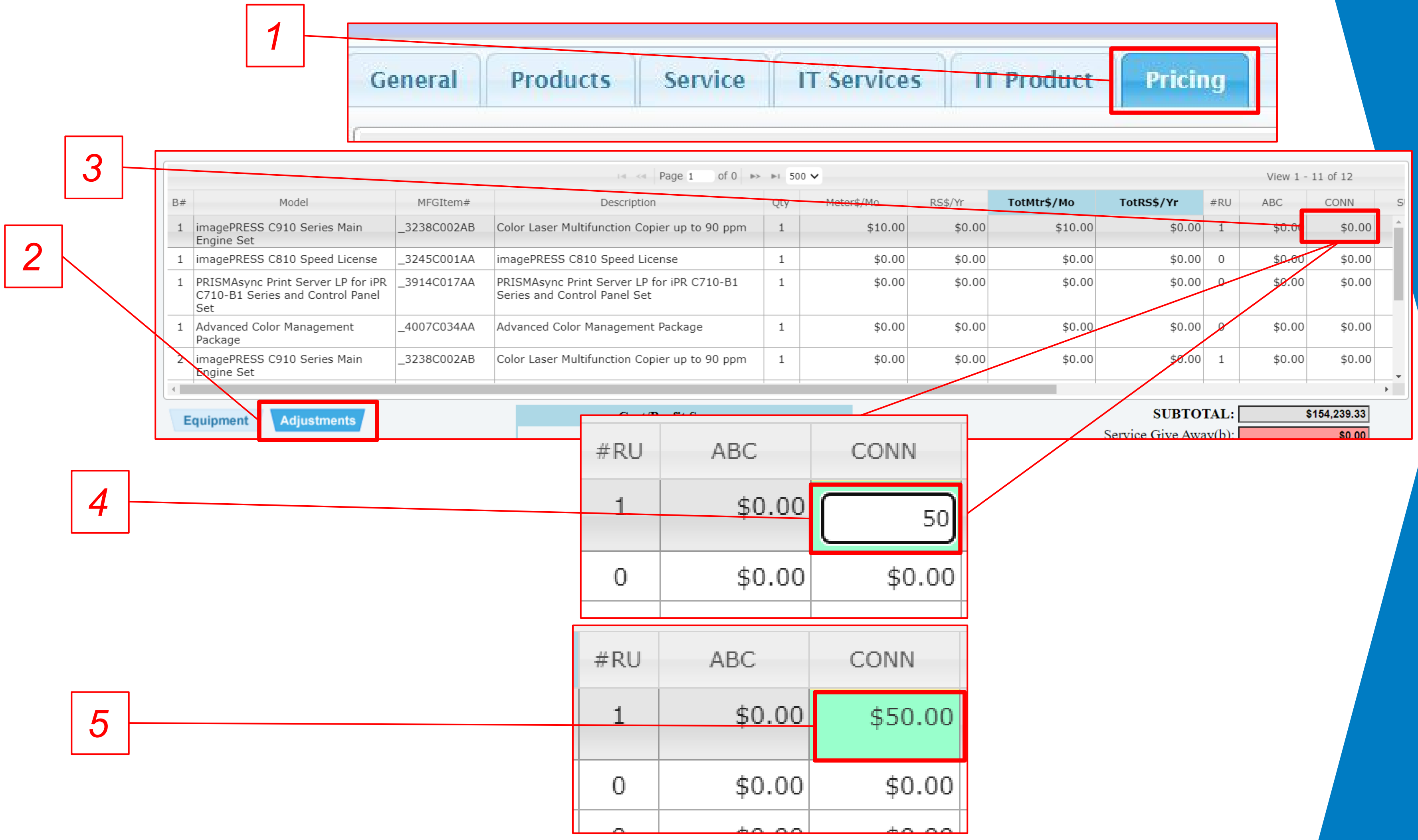
Quick Tip:
Edited fields which have a direct effect on profitability will be highlighted in yellow.

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

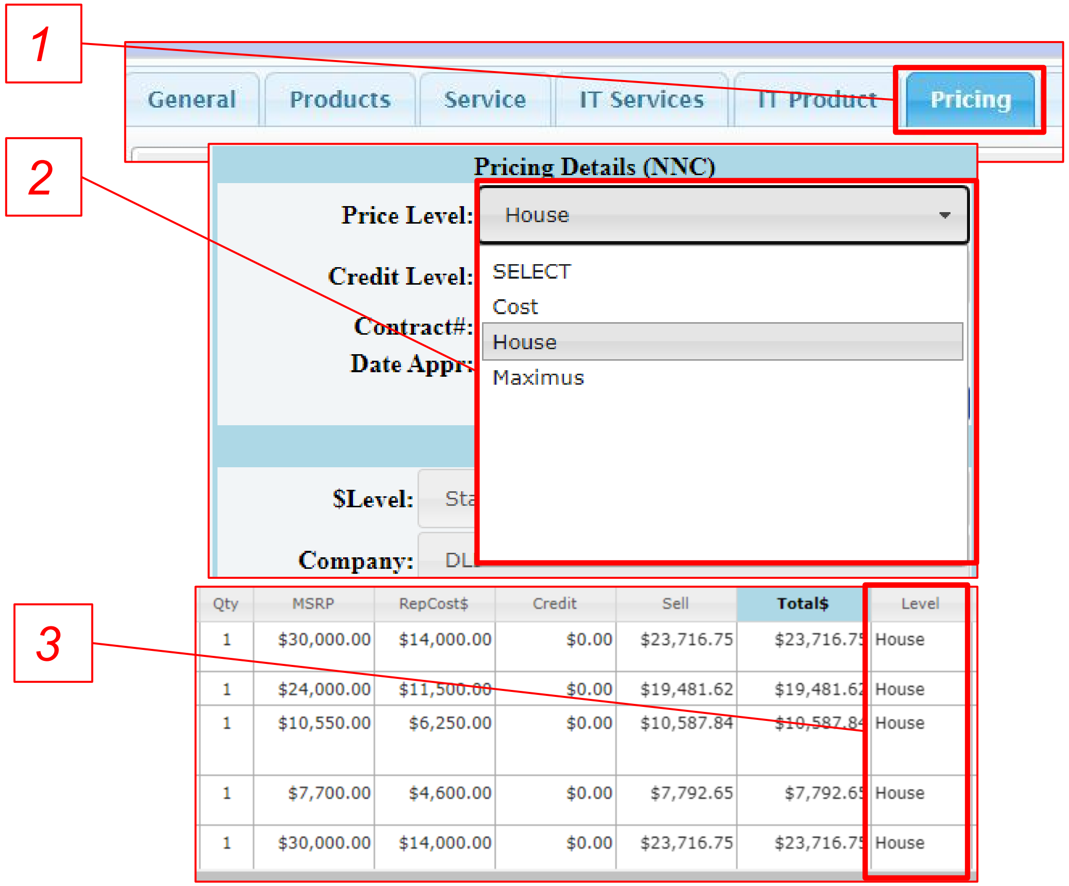


How to: Change a Deal's Price Level

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:

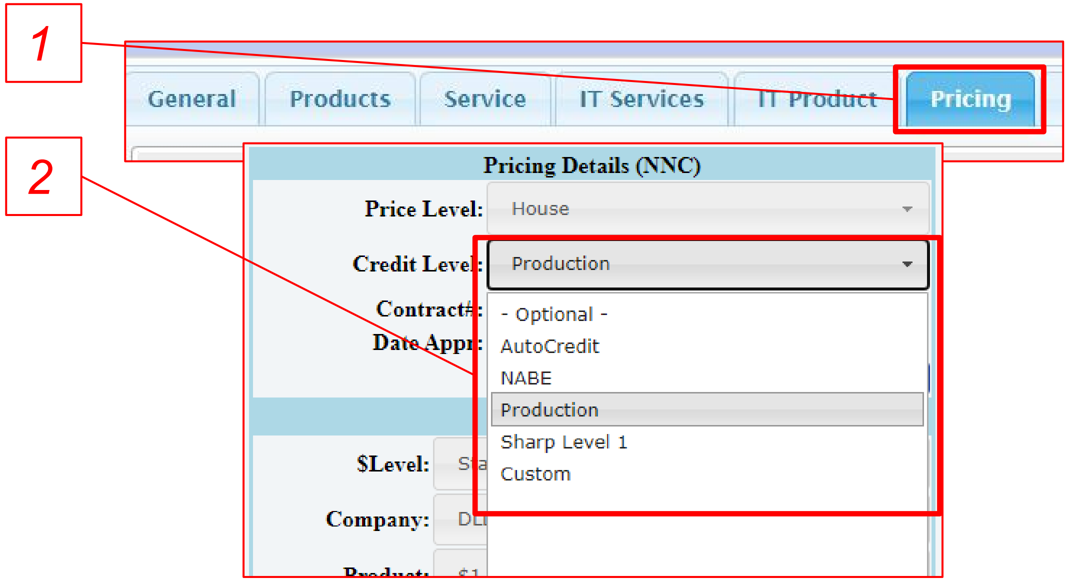
Pricing levels can be permissioned so that only certain users have access to certain price levels, like manager discounts. Contact your system administrator if there is a price level that you are not seeing and should have access to or submit a bid desk request (page 125) if you need a deal priced at a level you do not have access to.

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:

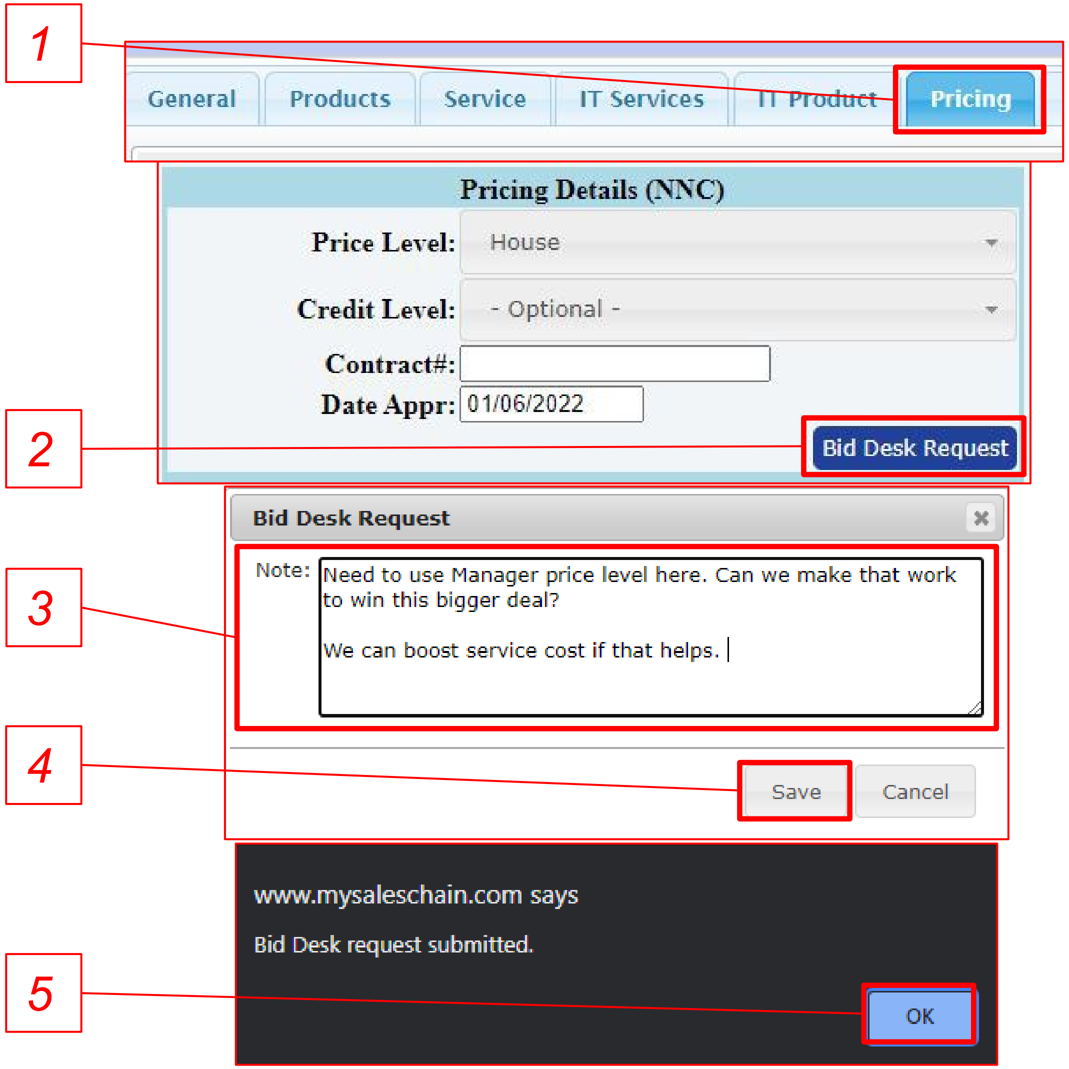
Credit levels can be permissioned so that only certain users have access to certain price levels, like manager discounts. Contact your system administrator if there is a credit level that you are not seeing and should have access to or submit a bid desk request (page 125) if you need a deal priced at a level you do not have access to.

How to: Submit a Bid Desk Request

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

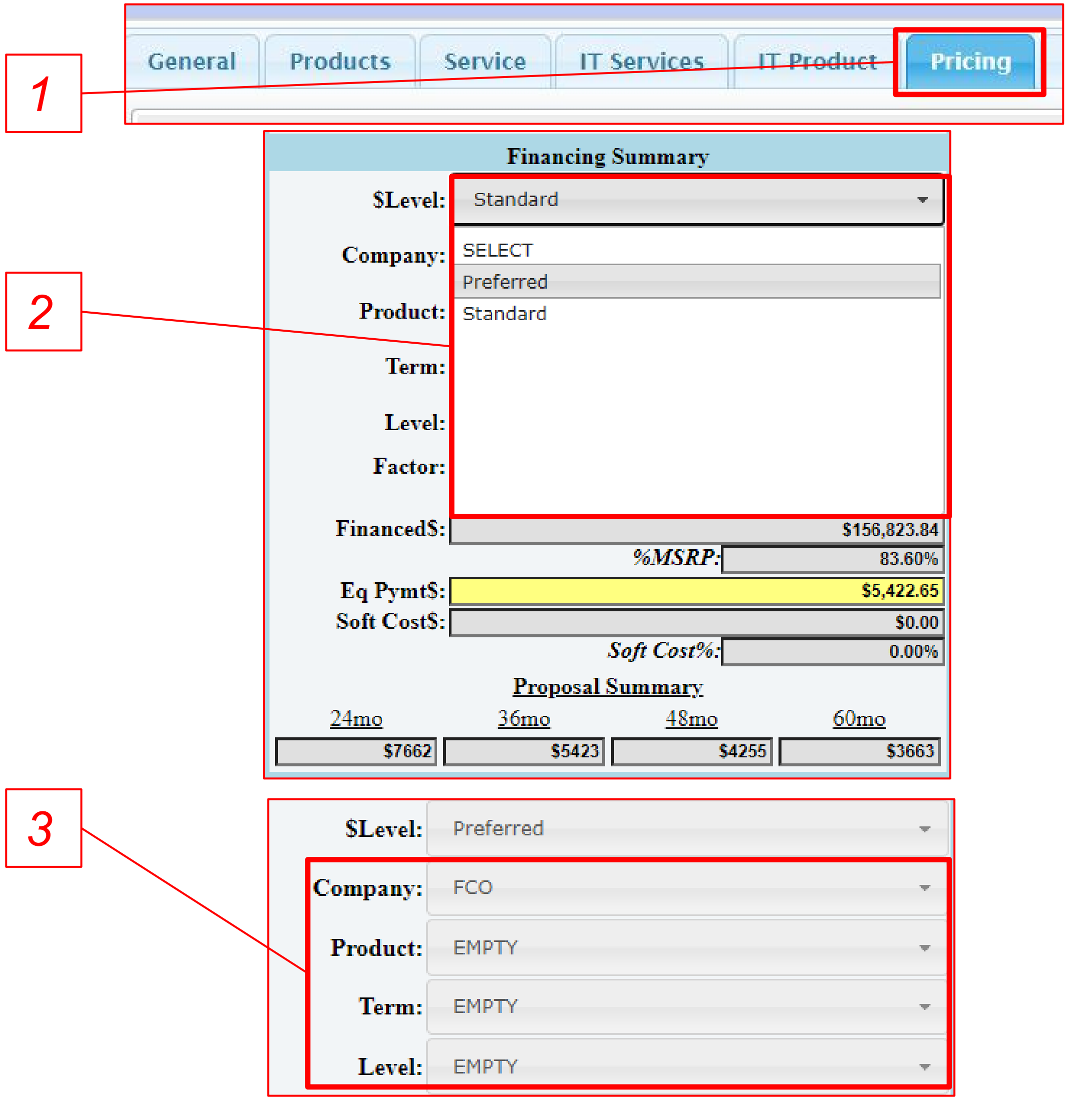


How to: Change a Deal's $Level

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*

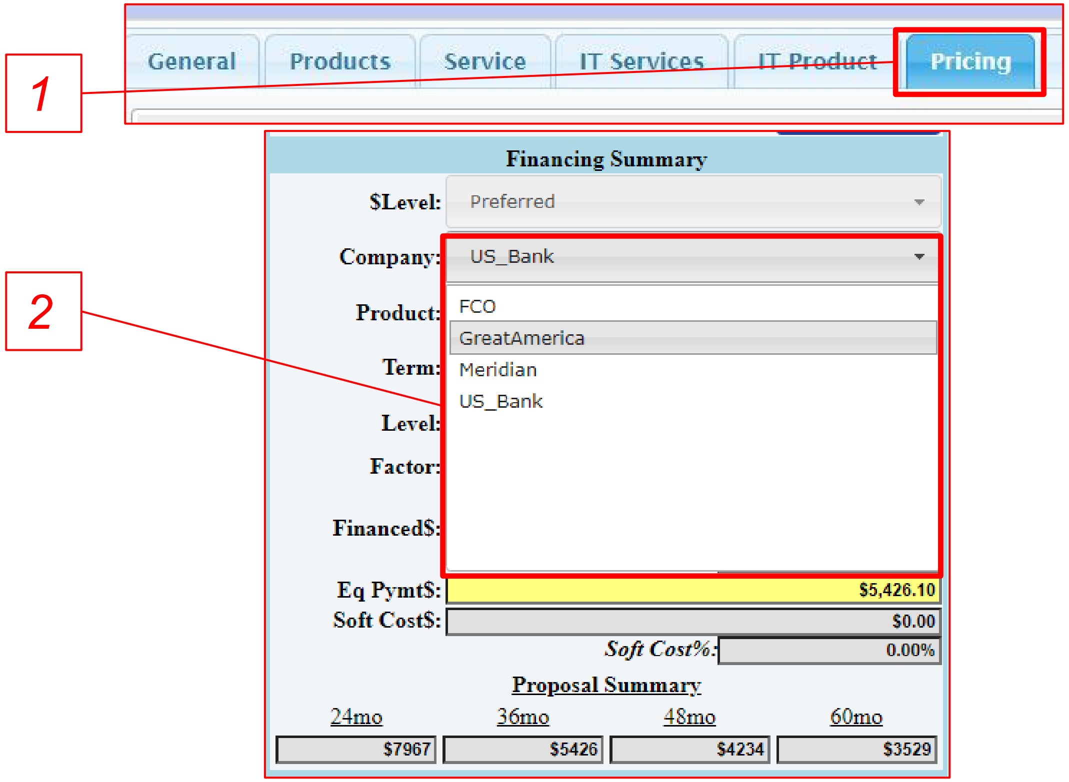


Quick Tip:

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.

How to: Change a Deal's Financing Company

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:

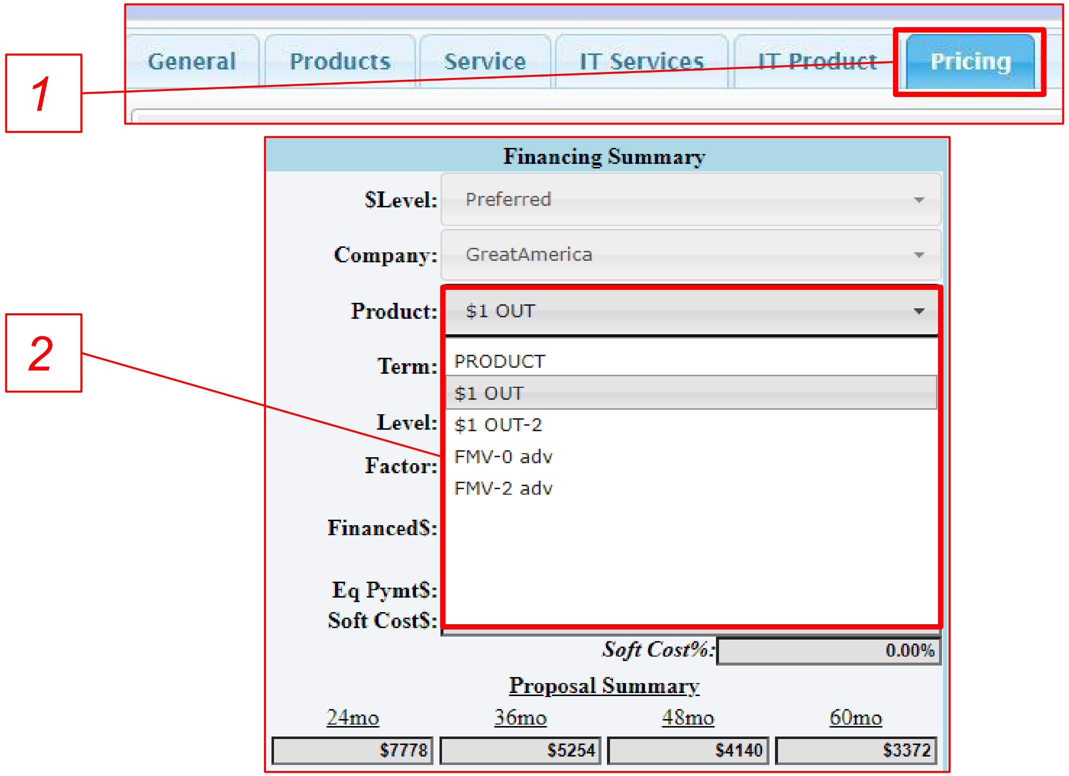
If the sale type of this proposal or order is not set to *Lease* the *Financing Summary* will not be accessible. See page 89 for how to change a deal's sale type.

How to: Change a Deal’s Lease Product

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

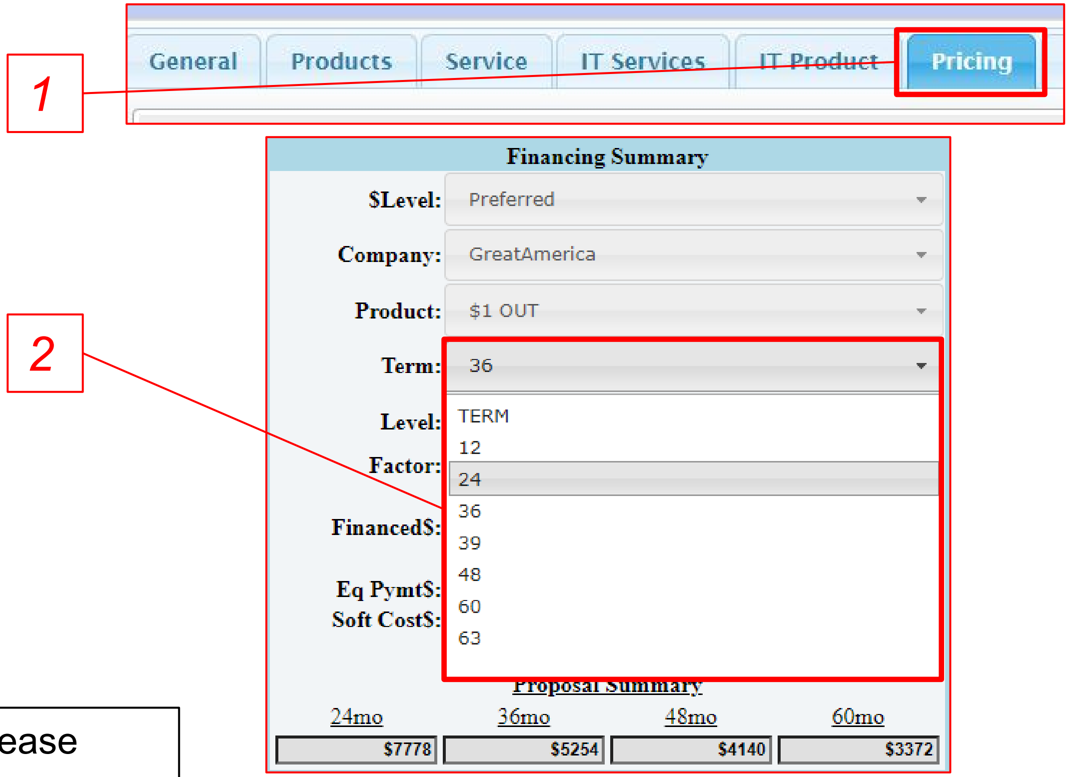


Quick Tip:

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 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:

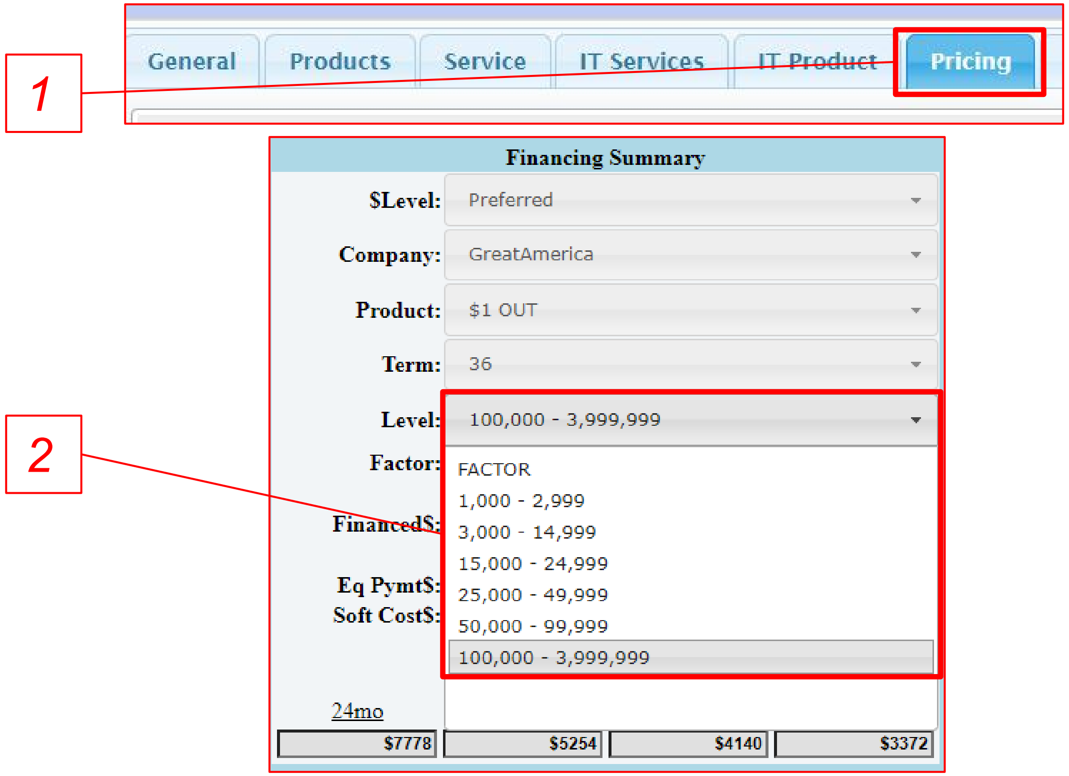
1. Click on the Pricing tab
2. In the *Financing Summary* Section, select the lease term you would like from the *Term* drop down

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 *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.



Quick Tip:

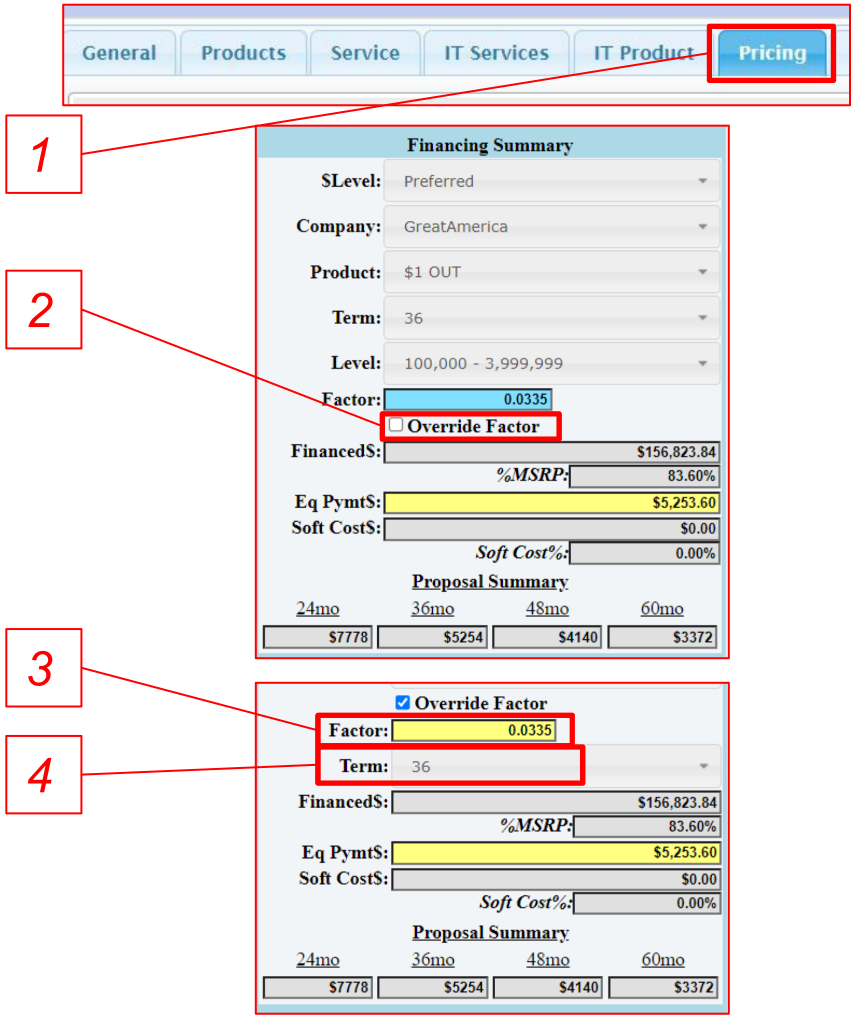
If the sale type of this proposal or order is not set to *Lease* the *Financing Summary* will not be accessible. See page 89 for how to change a deal's sale type.

How to: Override a Deal's Lease Rate Factor

The *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

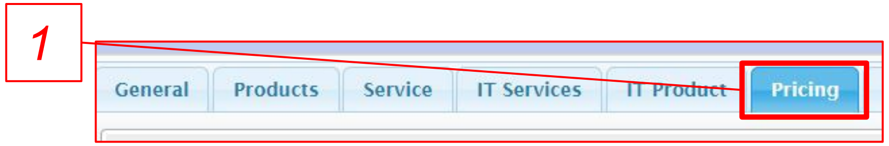


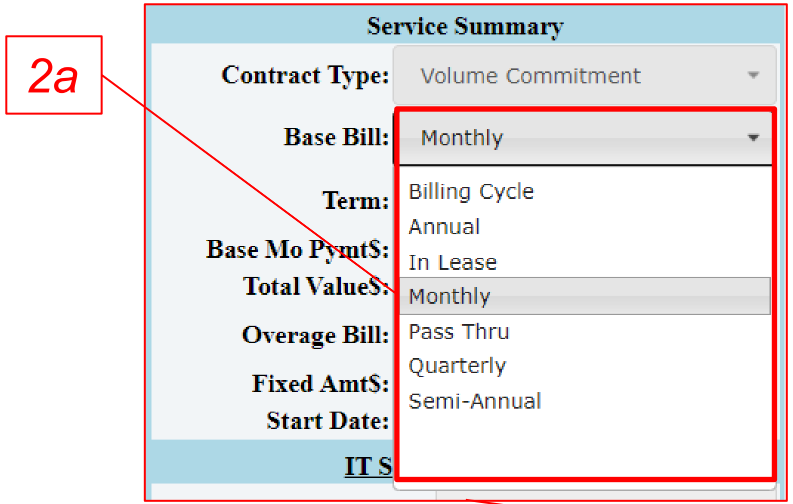
Quick Tip:

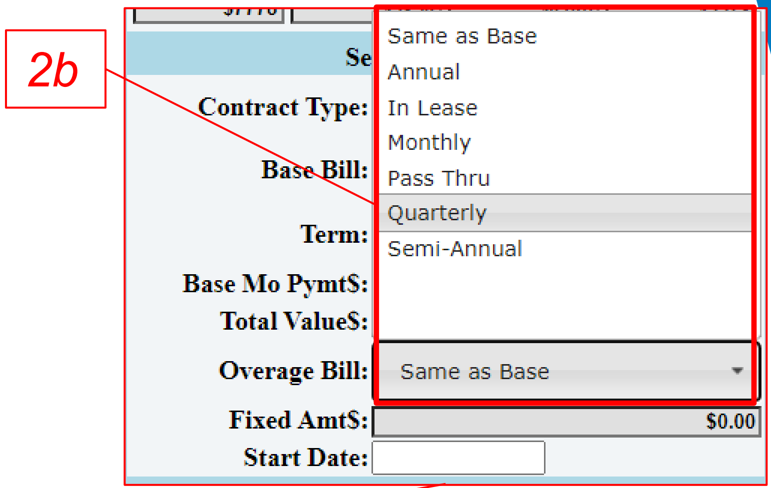
If the sale type of this proposal or order is not set to *Lease* the *Financing Summary* will not be accessible. See page 89 for how to change a deal's sale type.

How to: 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.

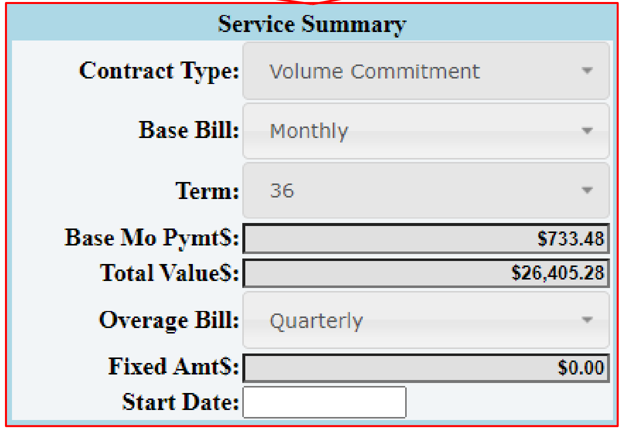






To change a deal's service billing interval:

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) or* b) Select your desired overage billing interval from the *Overage Bill* drop-down.



Quick Tip:

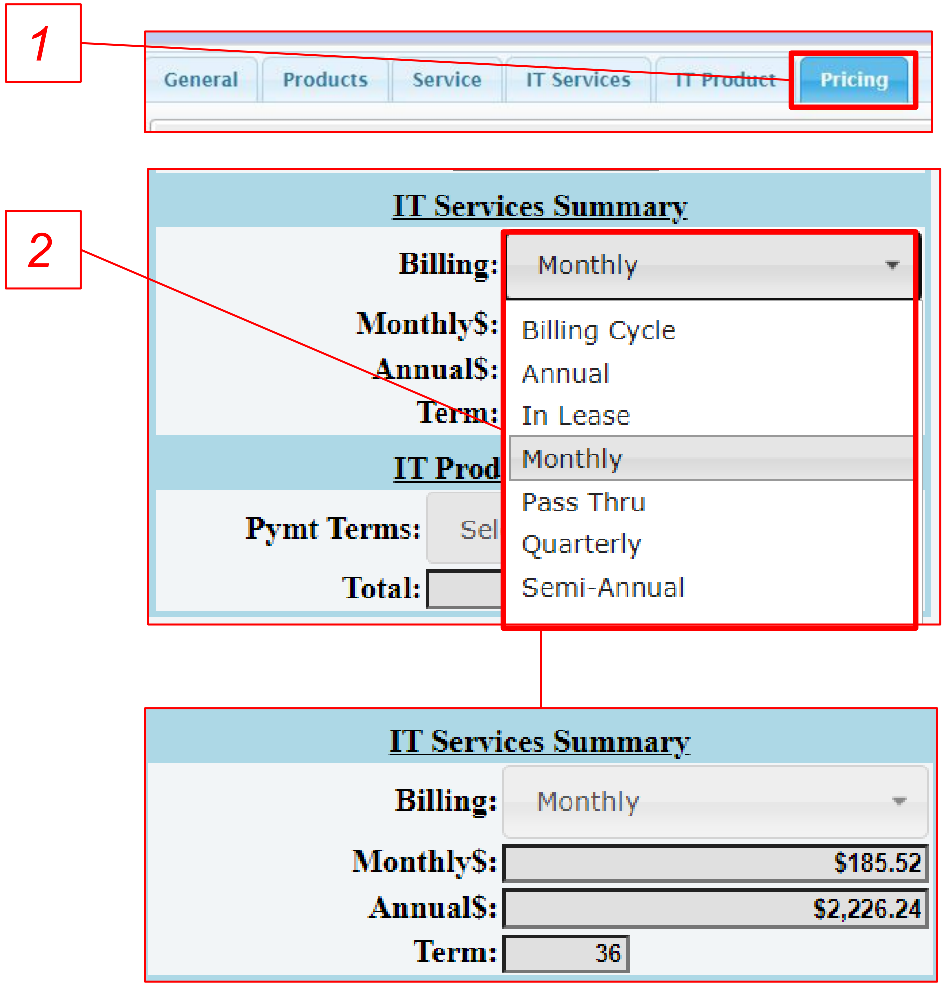
If you are pricing cost per copy (CPC) service, all service payments are considered overages.

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

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

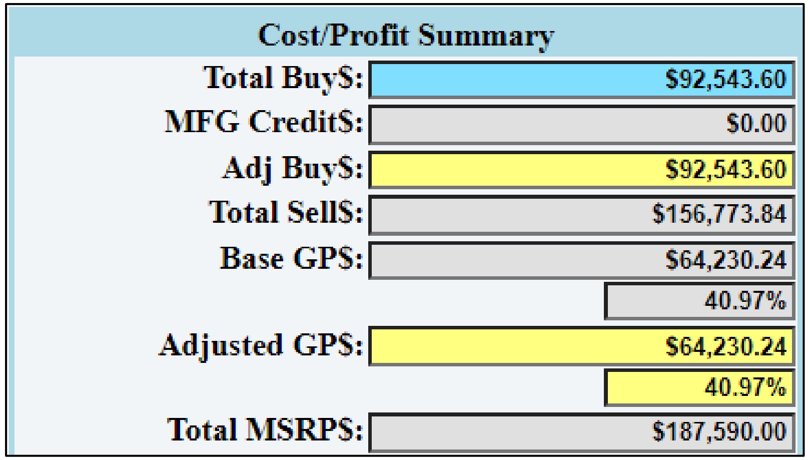
To change a deal's IT service billing interval:

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*)



Cost/Profit Summary

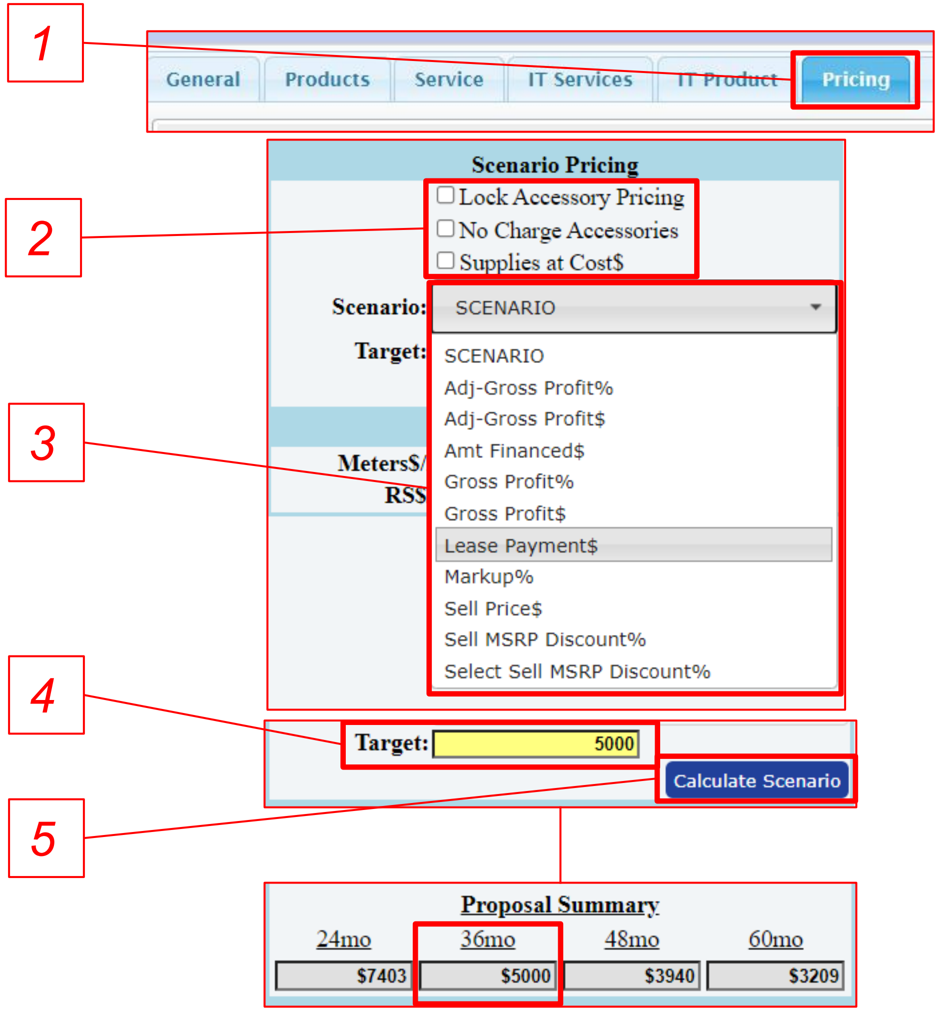
The *Cost Profit Summary* section of the pricing tab displays a summary of the proposal or order that you are pricing.



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.

How To: Use the Scenario Pricing Tool

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:

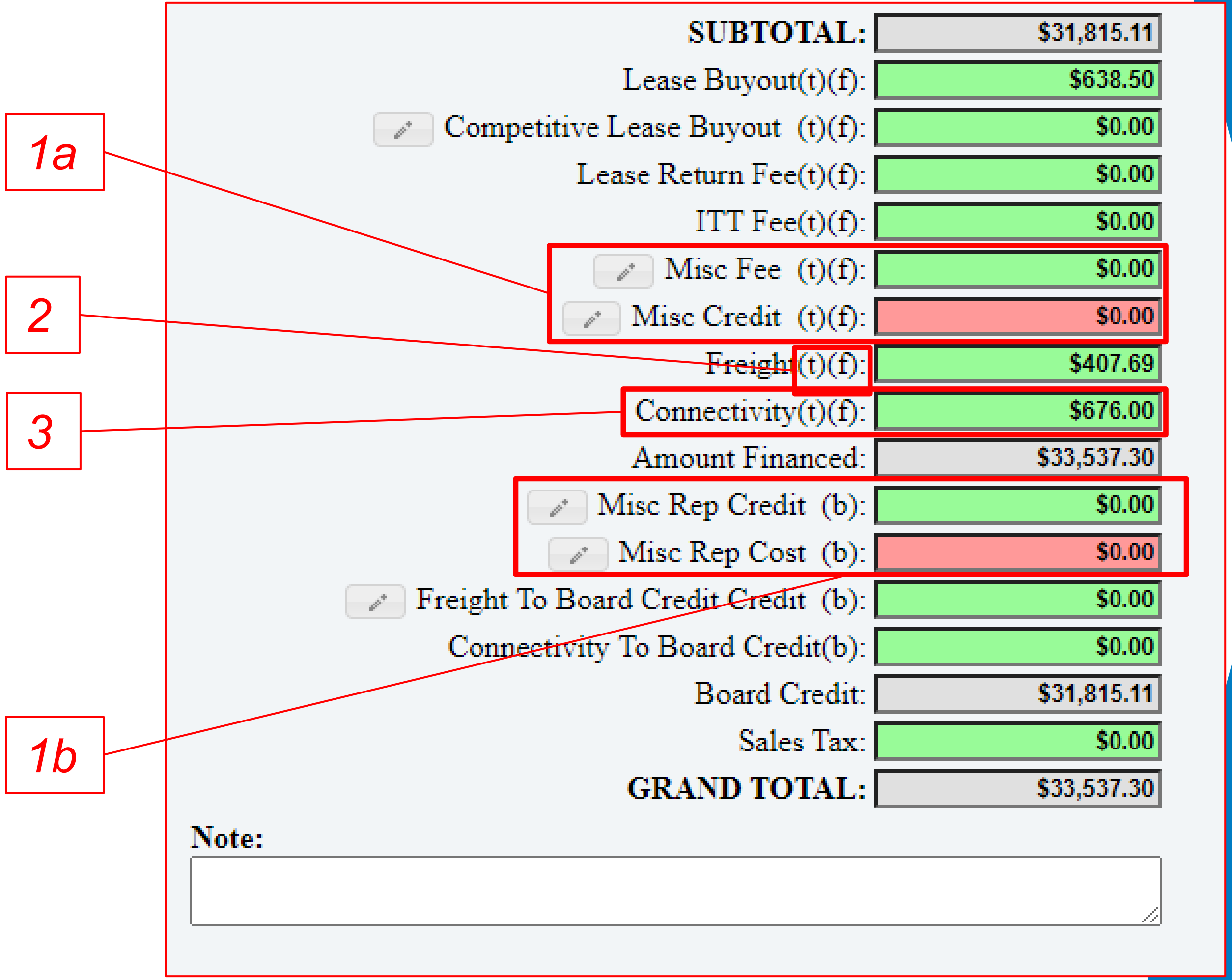
If you are targeting a lease payment, the scenario pricing tool will use the lease term and rate factor that is selected in the *Financing Summary*. See page 129 for instructions on changing the lease term.

Proposal and Order Pricing: Soft Costs and Margin Adjustments

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 in red 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 122) and the total is displayed here, while the lease buyout value is actually entered here.

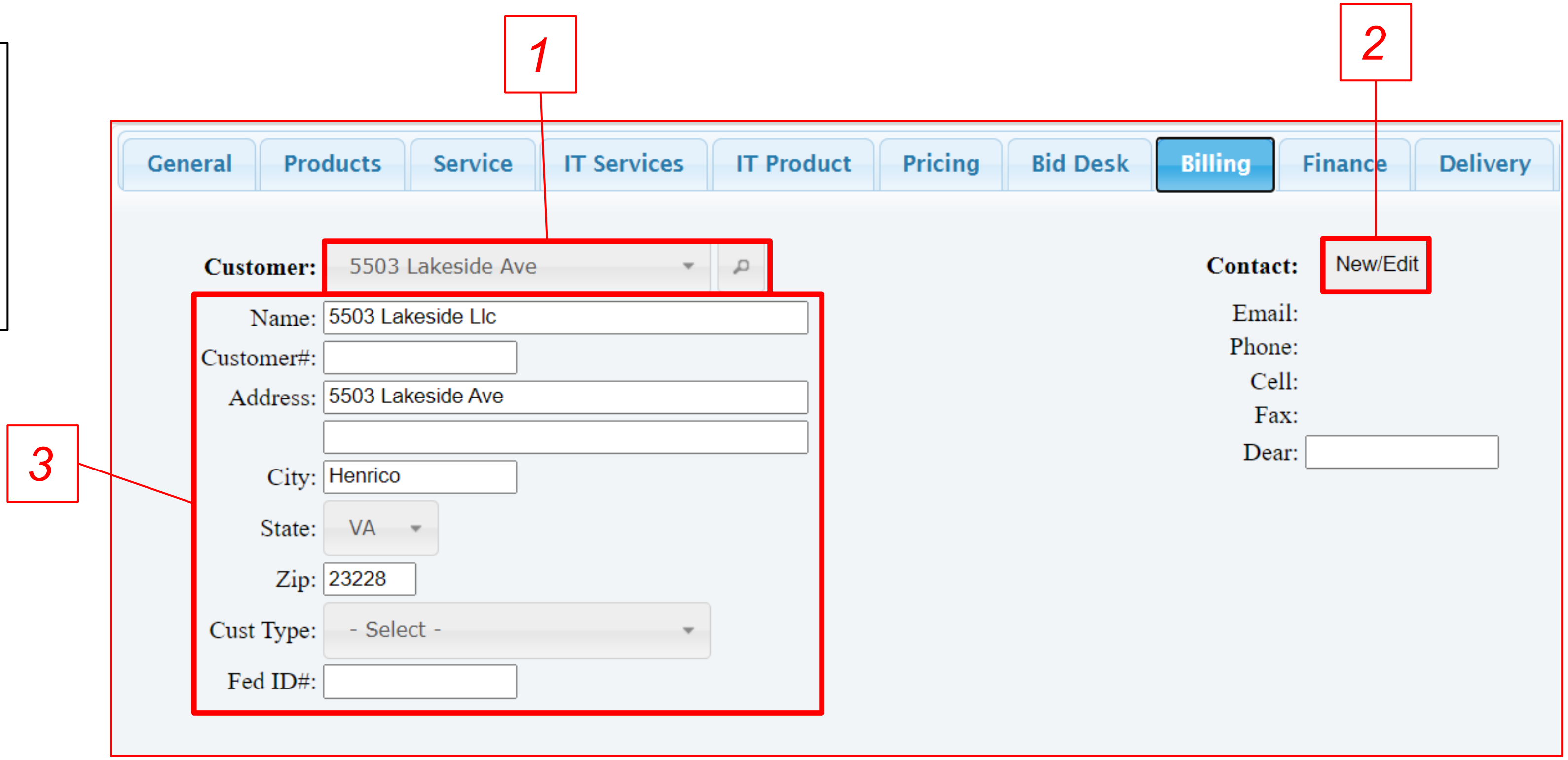


Proposal and Order Pricing: Billing Tab

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

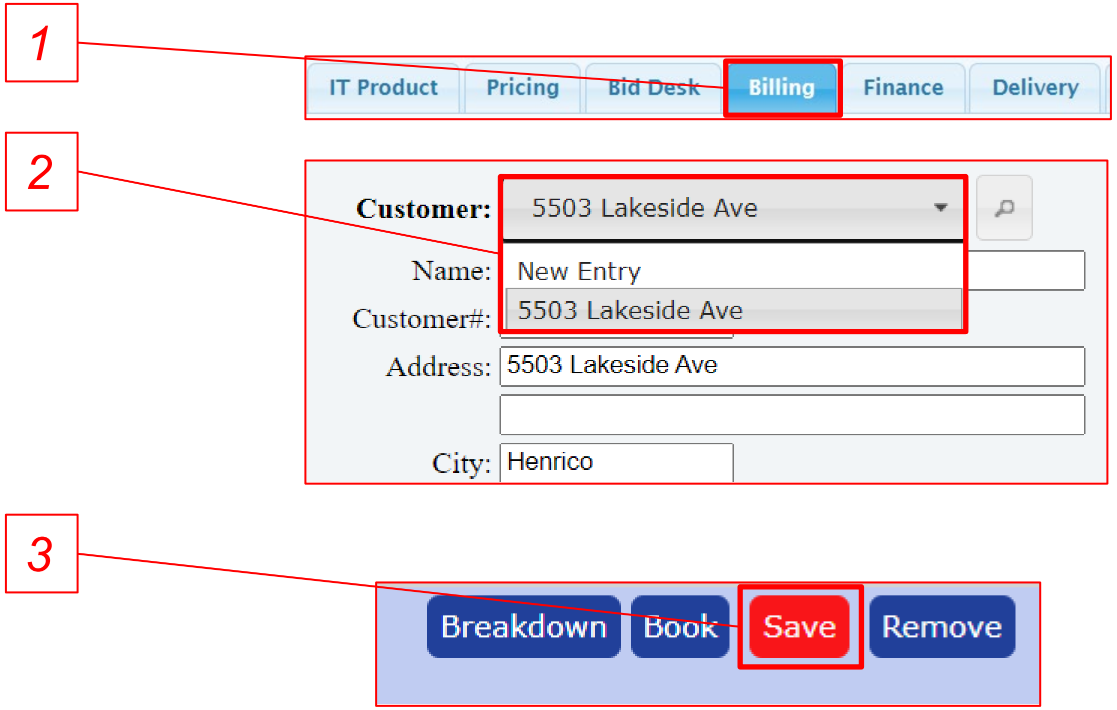


How To: Change a Proposal or Order's Billing Address

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

To change a deal's billing address:

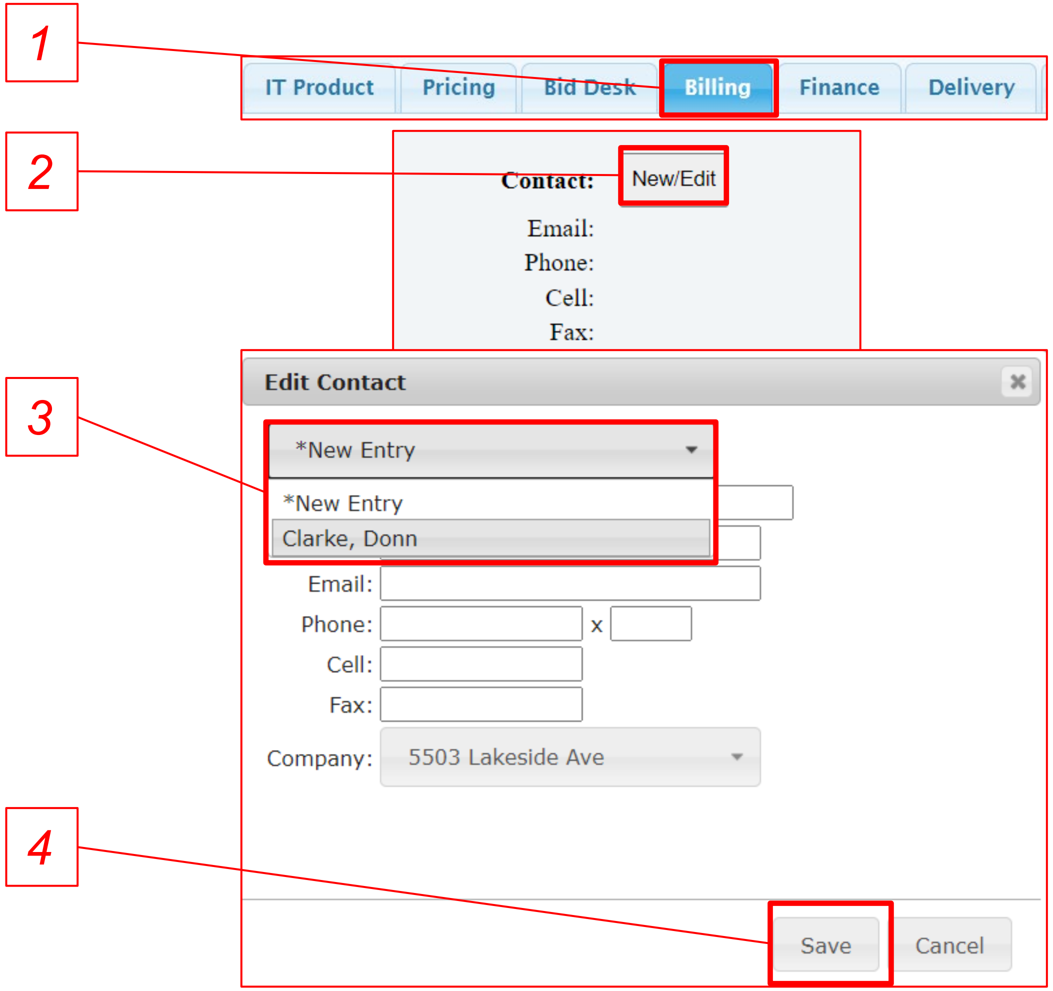
1) Click on the *Billing* tab
2) Select the address you would like to send bills to using the Customer drop-down or select New entry and enter a new address
3) **IF** you have entered a new address, click the red *Save* button at the top right



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:

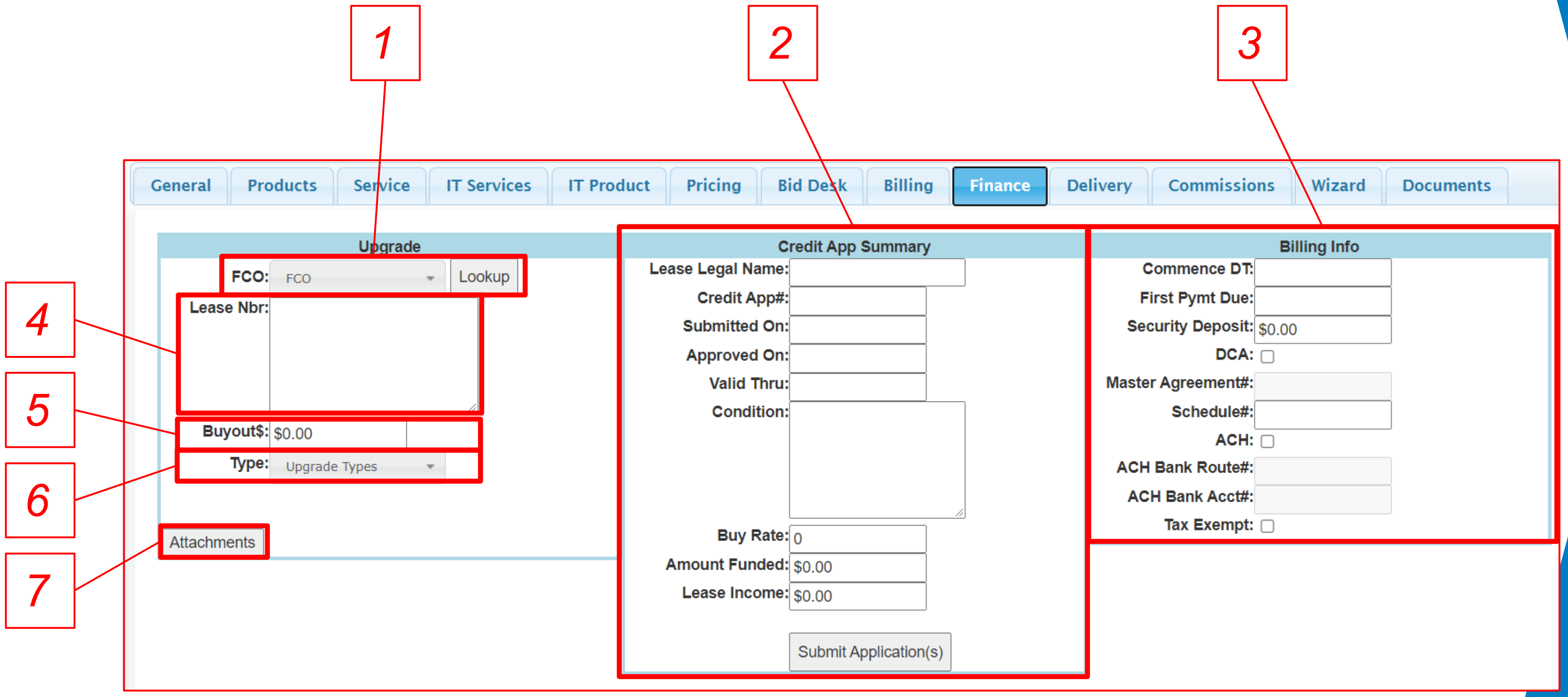
If you enter a new contact, a new contact will be created and associated with the existing account in SalesChain.

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 120)
6) Lease upgrade type selection
7) Attach a document

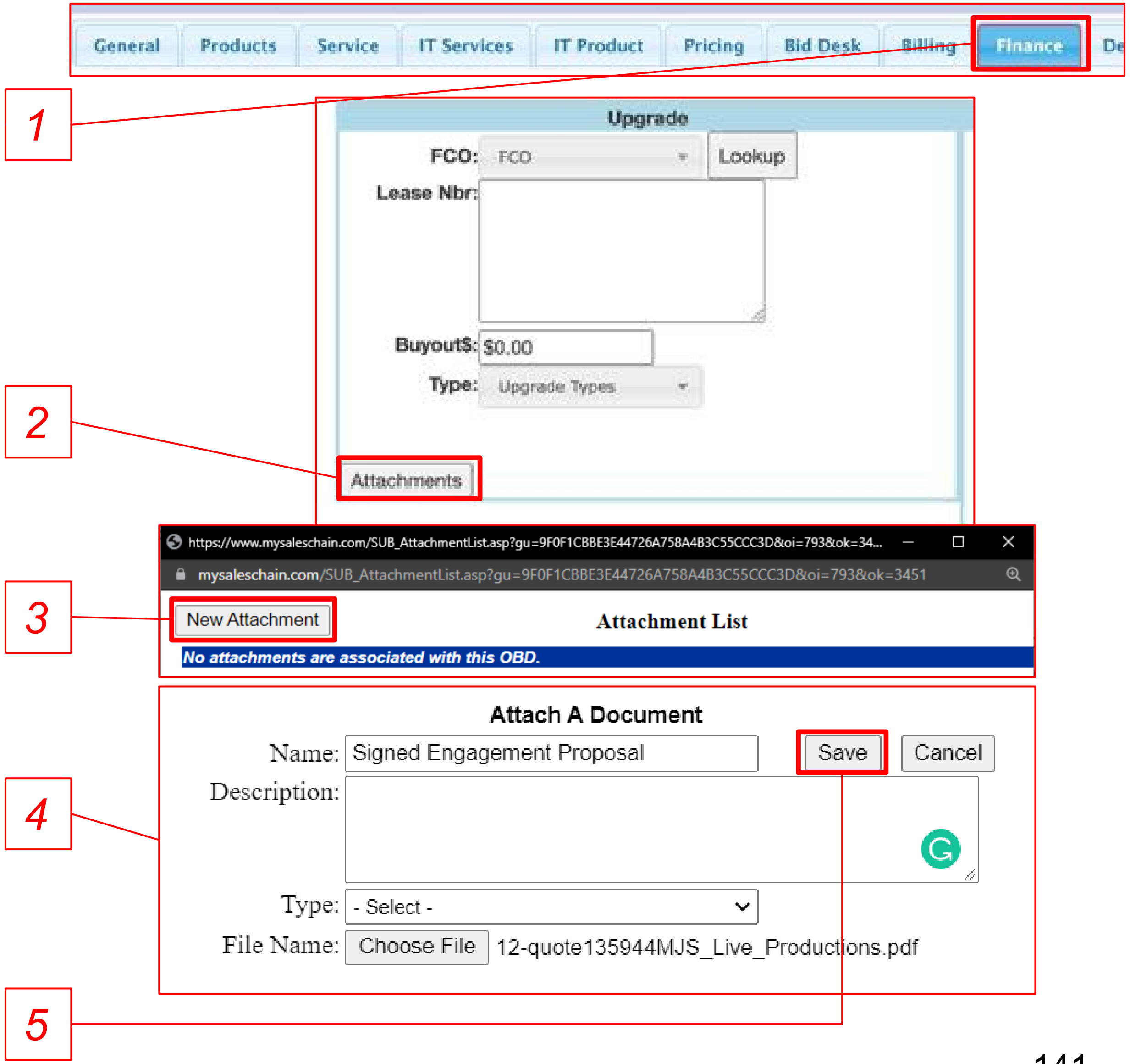


How To: Attach a Document to an Order

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*

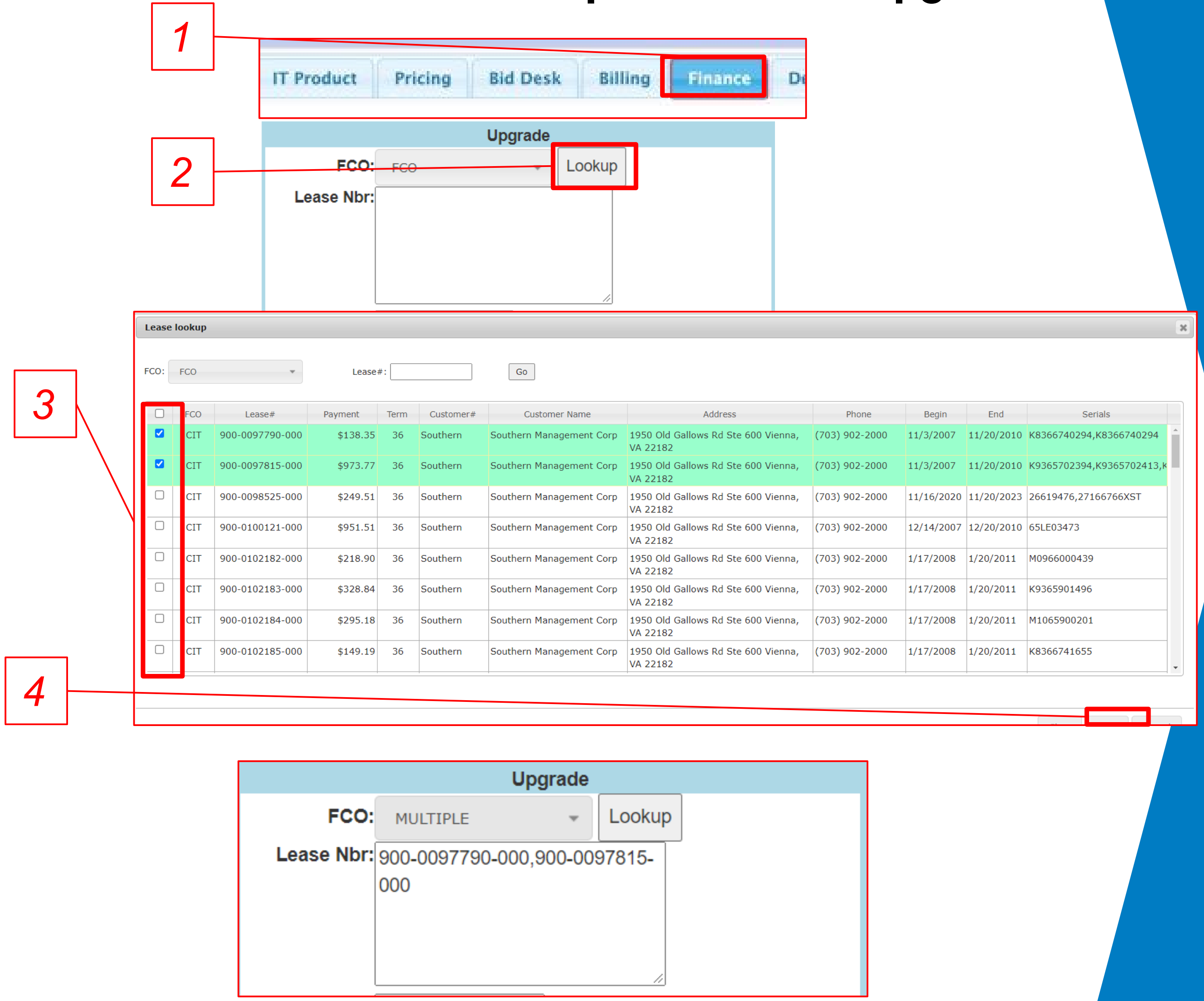


How To: Lookup a Lease for Upgrade

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*

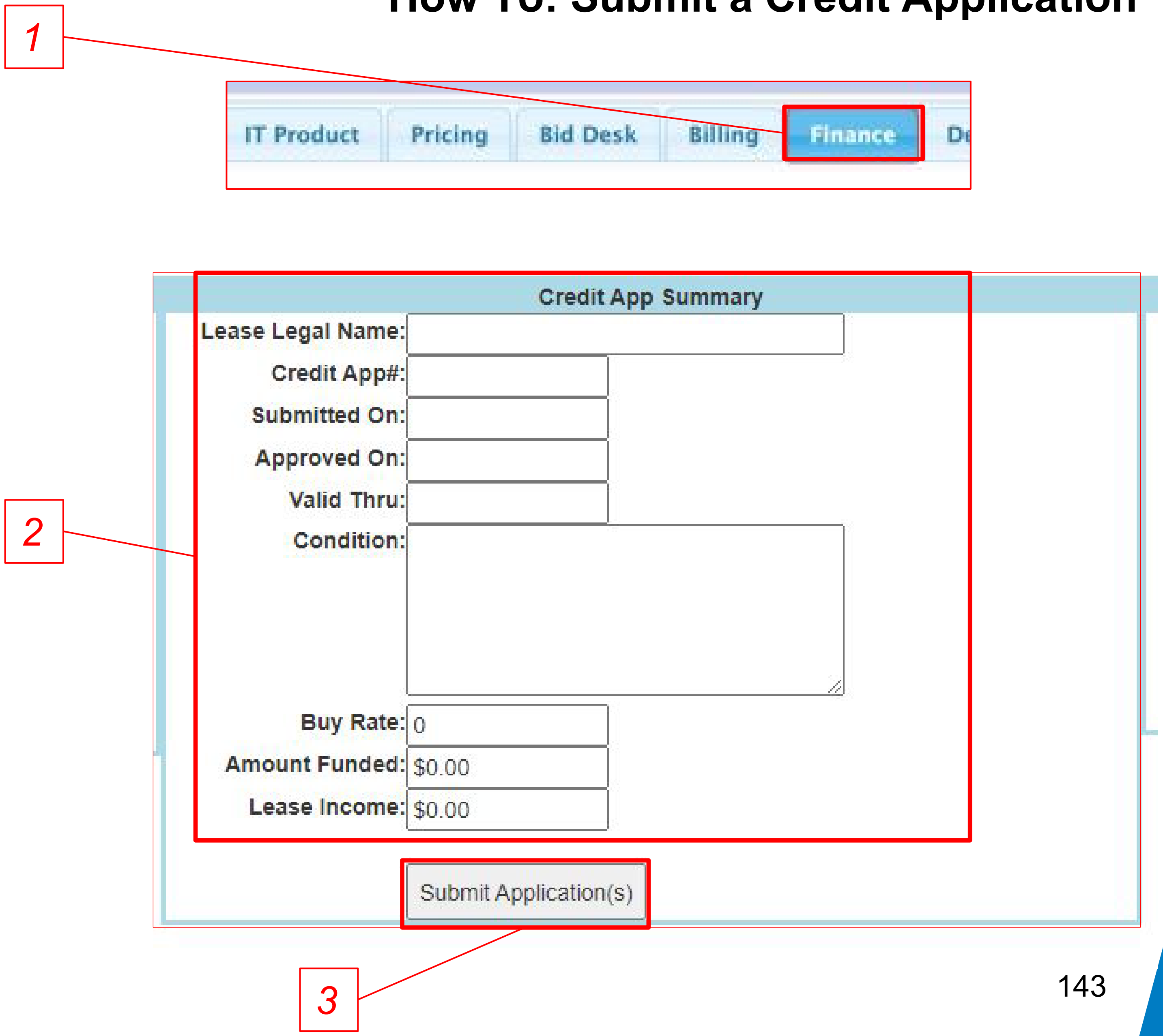


How To: Submit a Credit Application

When you are finished pricing a deal and have filled out the financing summary information in the *Pricing* tab (See page 120) 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:

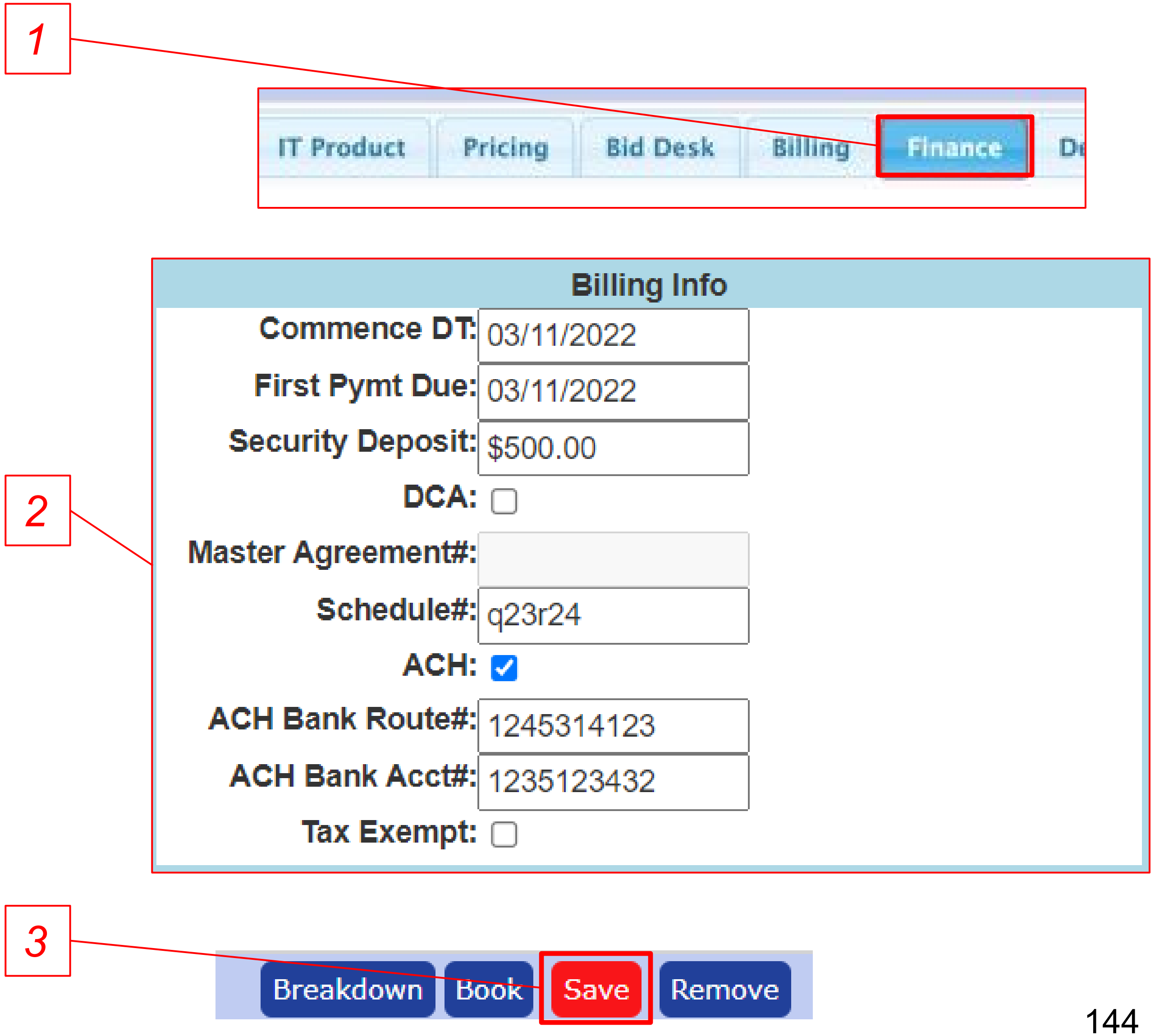
1. Navigate to the Finance tab
2. Fill out the blanks in the Credit App Summary box
3. Click *Submit Application(s)*



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

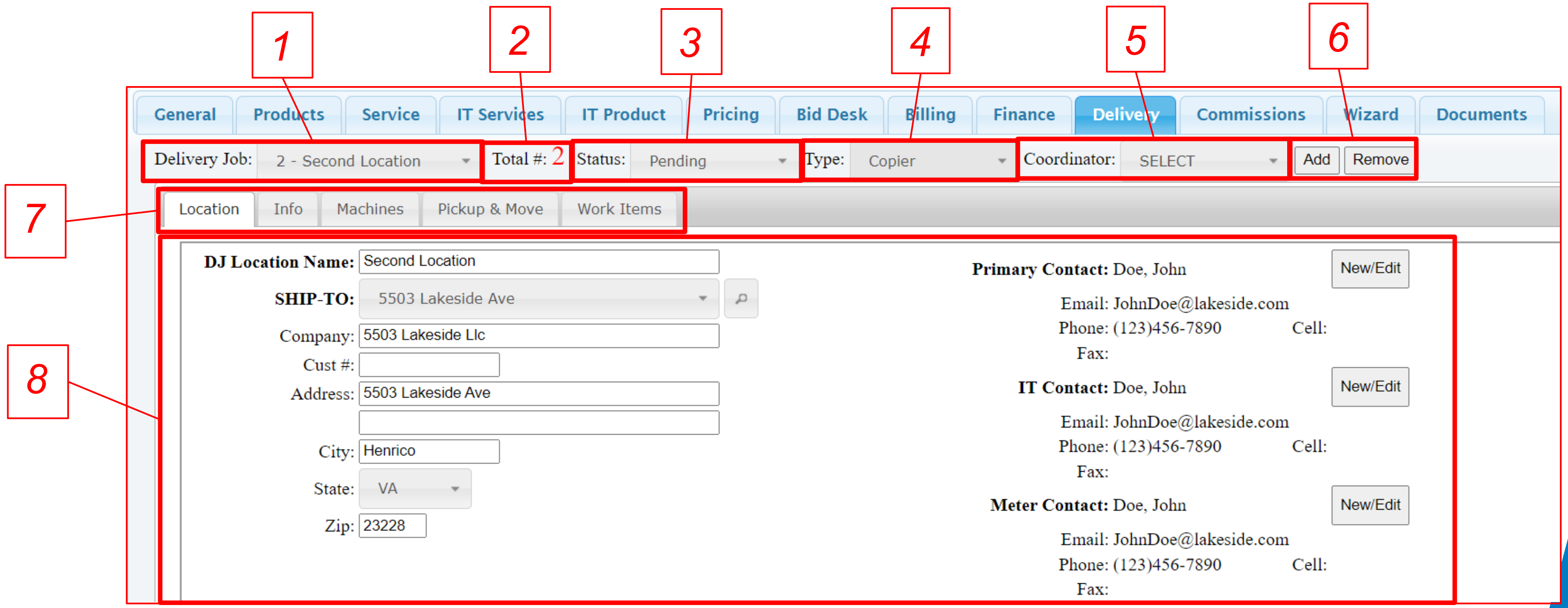


Proposal and Order Pricing: Delivery Tab

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.

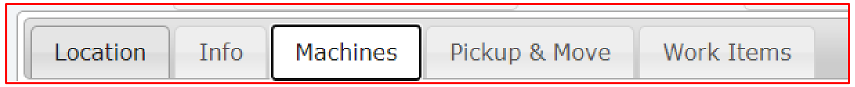
Key:

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 *Location* subtab (See Page 147)



Delivery Tab Vocabulary

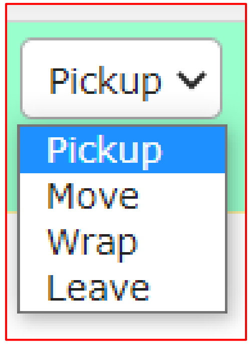
There are five subtabs within the delivery tab which allow you to view and edit delivery information. They are outlined in the table below.



Delivery Tab Subtabs		
Subtab	**Page Number**	**Description**
Location	147	Enter address and contact information for each delivery job
Info	150	Enter details about each delivery location and request delivery dates
Machines	152	Allocate assets to each location to make sure they're headed to the right place in multi-location orders
Pickup & Move	153	Enter information for assets to be picked up, designate which machines on this order will replace them, and more
Work Items	155	Check boxes in this tab to keep track of progress as this order is fulfilled

There are four types of delivery jobs which you can choose from within the *Delivery* tab to give instructions to your delivery team. See page 148 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

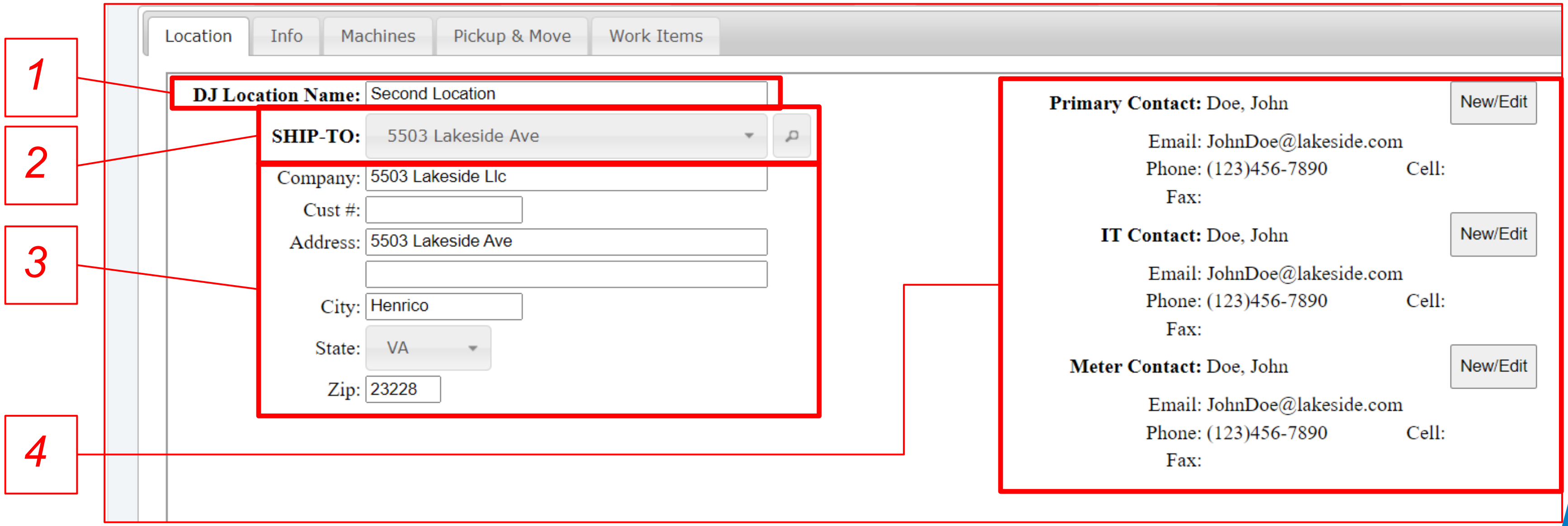


Proposal and Order Pricing: Delivery Tab - Location Subtab

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.



How To: Add Additional Delivery Jobs to an Order

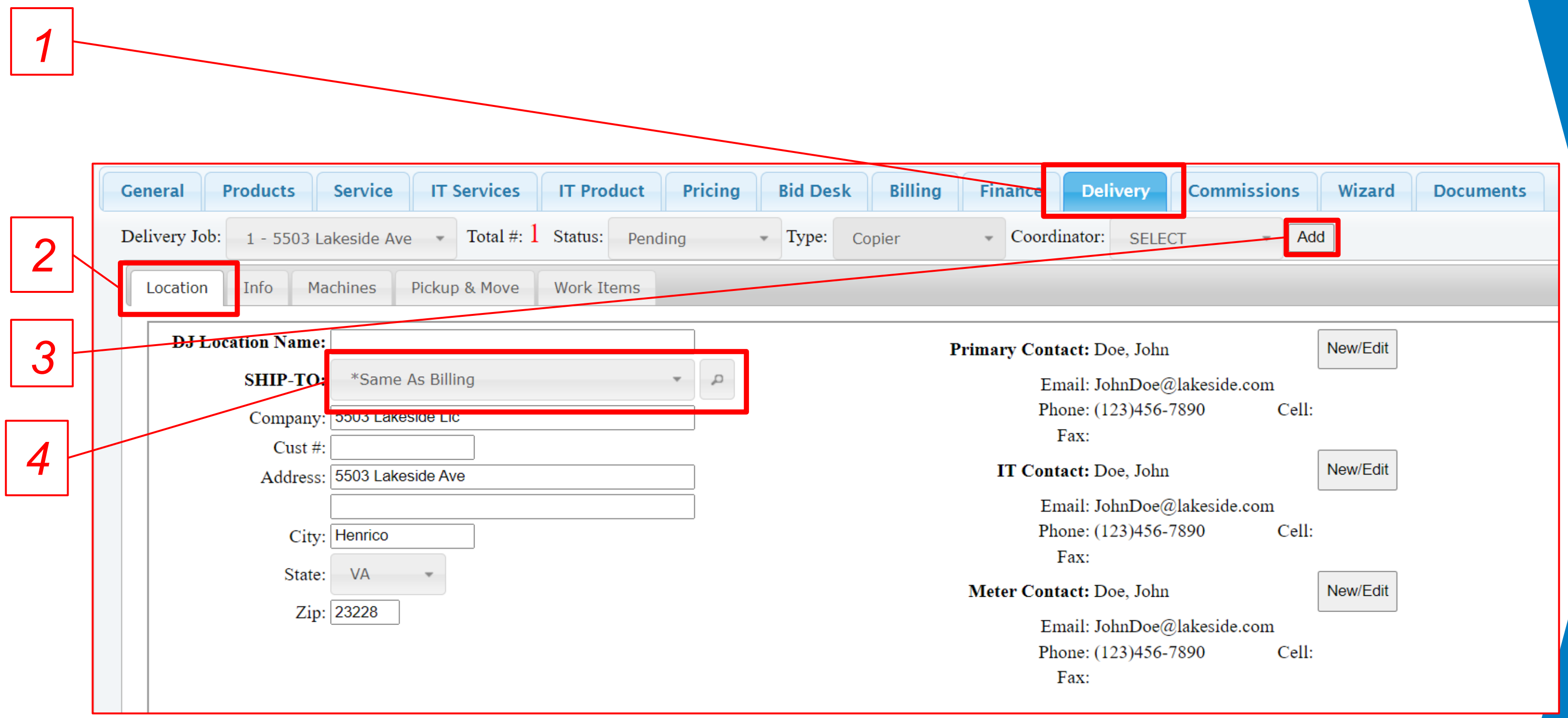
An order can have multiple delivery jobs if different equipment is to be delivered to different locations, or when a partial delivery is required. If all assets on an order are going to the bill-to location, you **don’t** need multiple delivery jobs.

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 **



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:

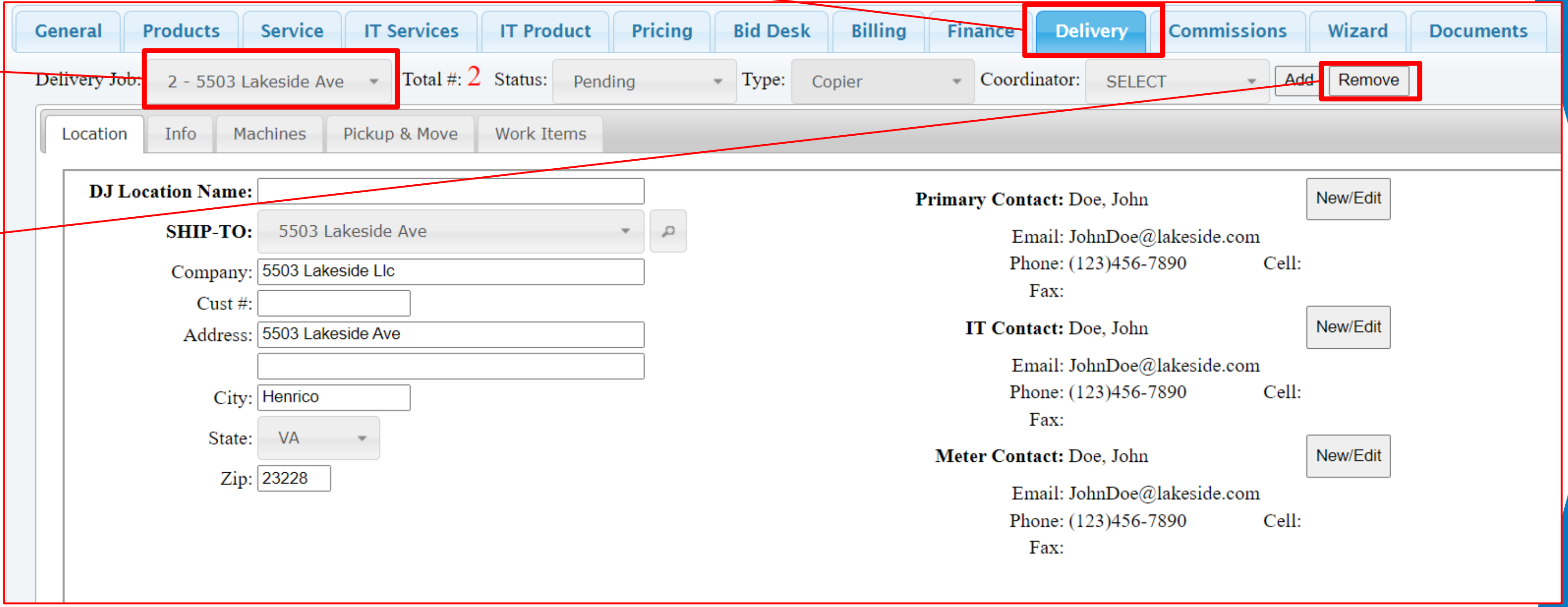
1. Navigate to the Delivery tab
2. Select the desired address from the *Delivery Job* drop-down
3. Click *Remove*
4. Click *Ok* in the pop-up window

** Repeat steps 2-4 as needed **

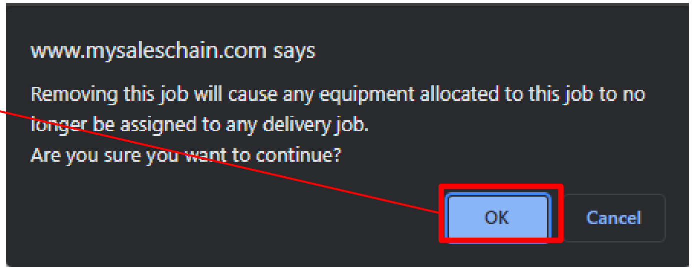
1

2

3



4



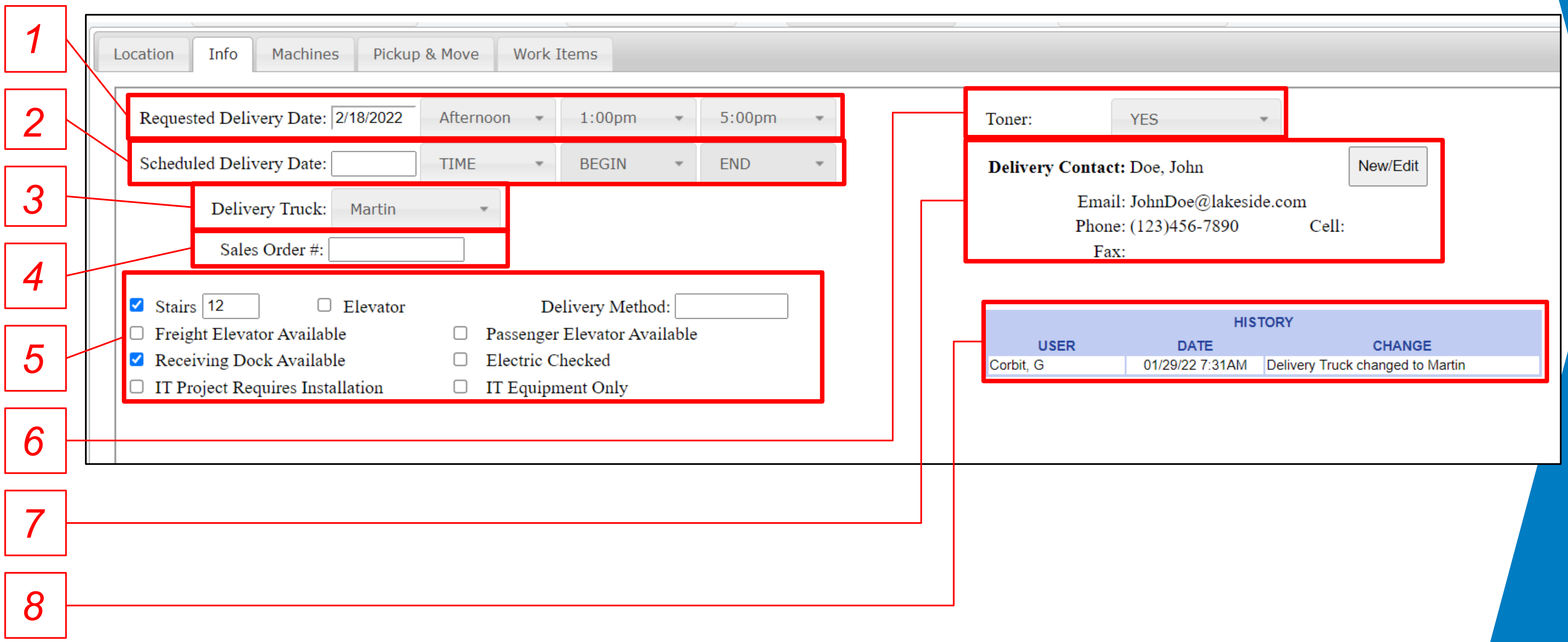
Proposal & Order Pricing: Delivery Tab - Info Subtab

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)



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.

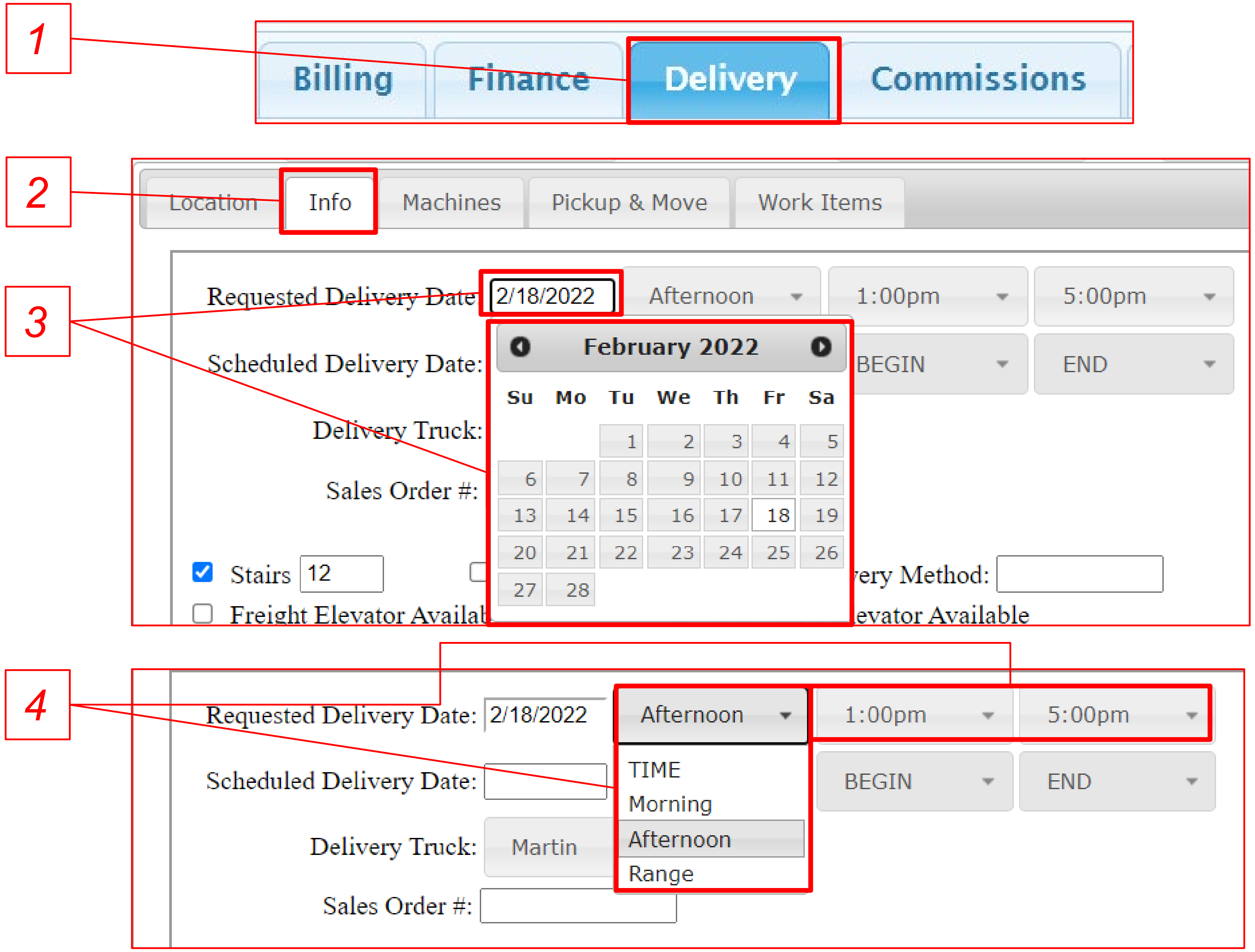
Note: This sends a message to the fulfillment or management staff to request this date and time while not actually locking the delivery staff into a committed date and time window.

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**



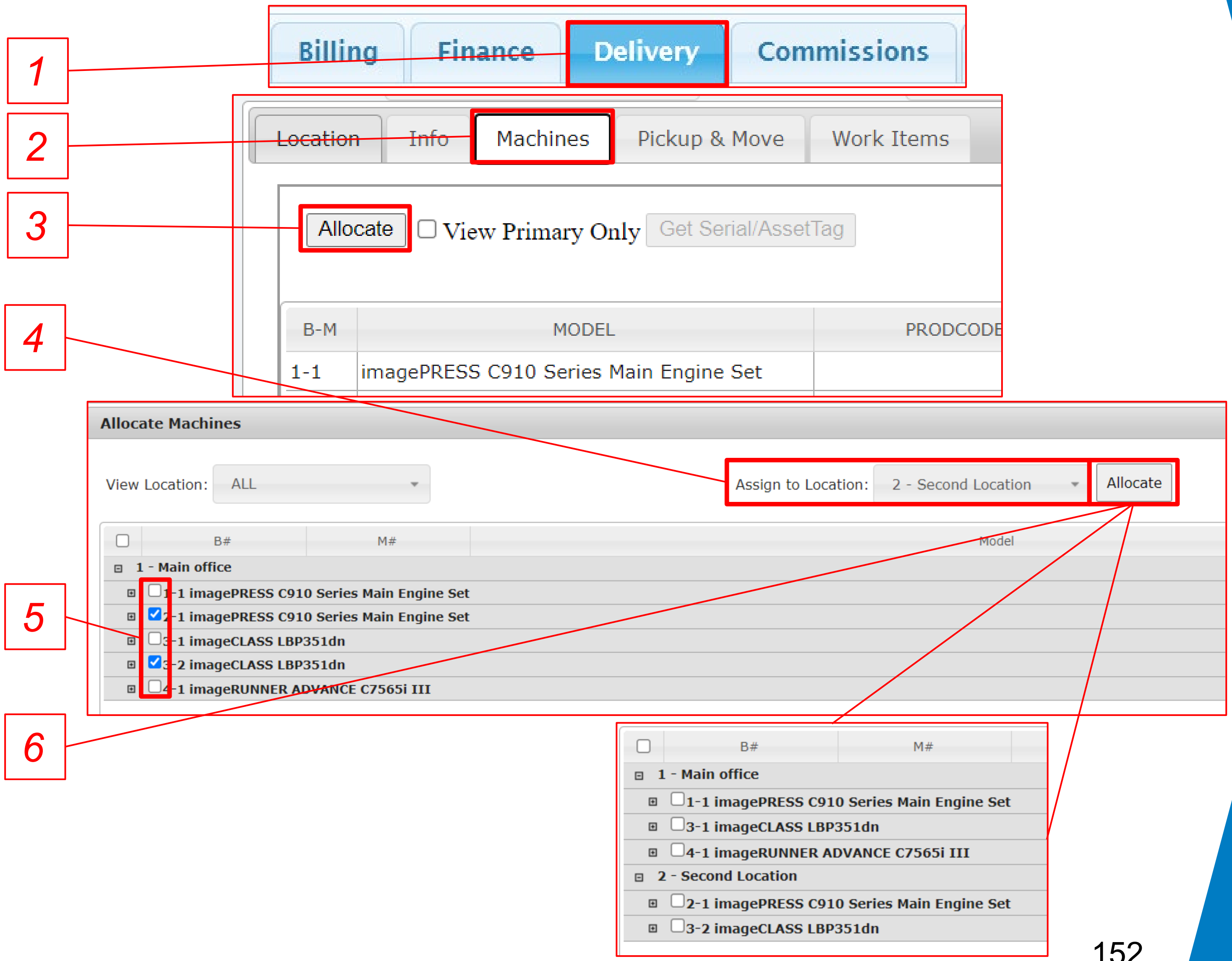
How to: Allocate Assets to Delivery Jobs

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.

<u>View a Tutorial Video</u>

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.

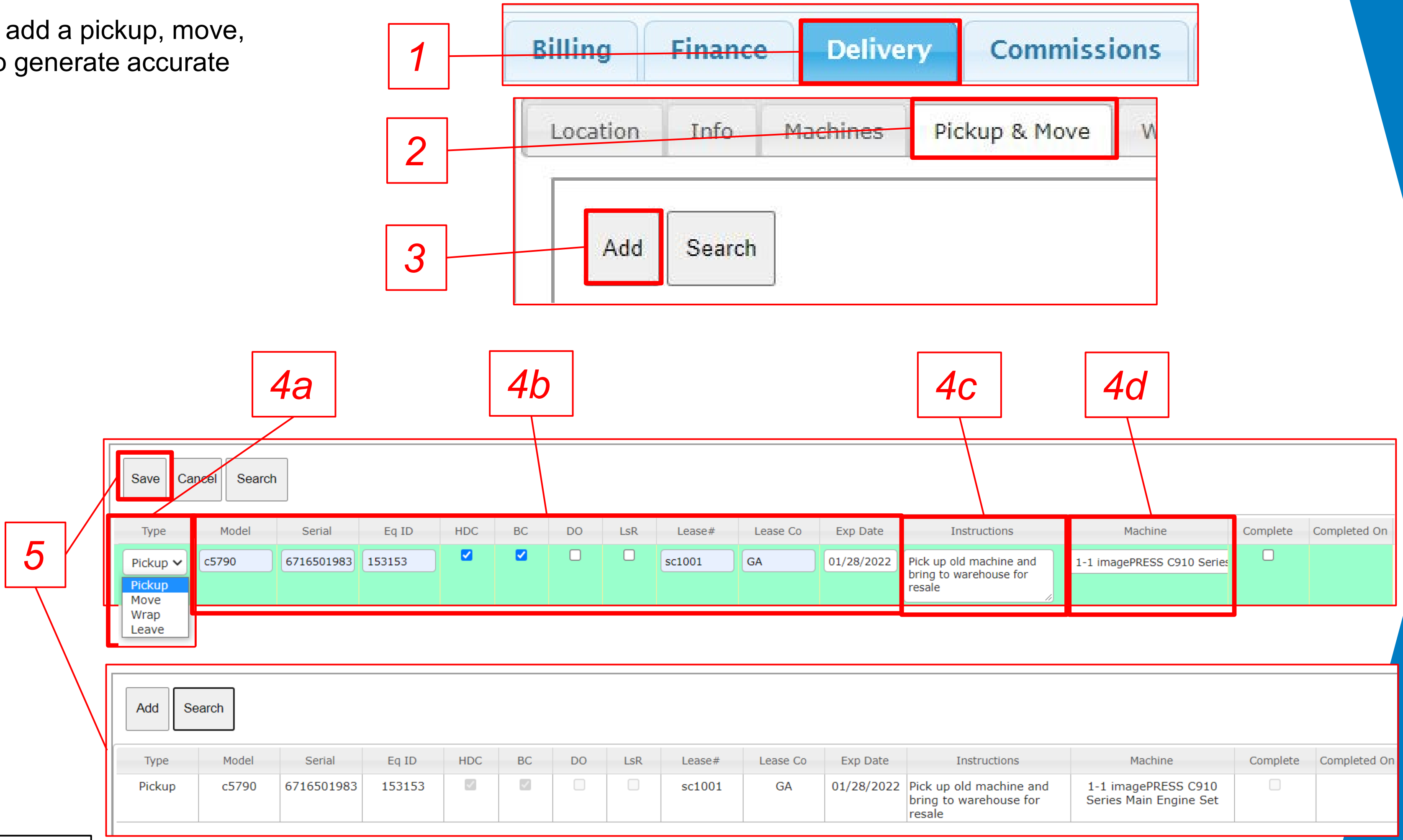
How To: Add Pickup and Move Instructions to a Delivery Job

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



Quick Tips:

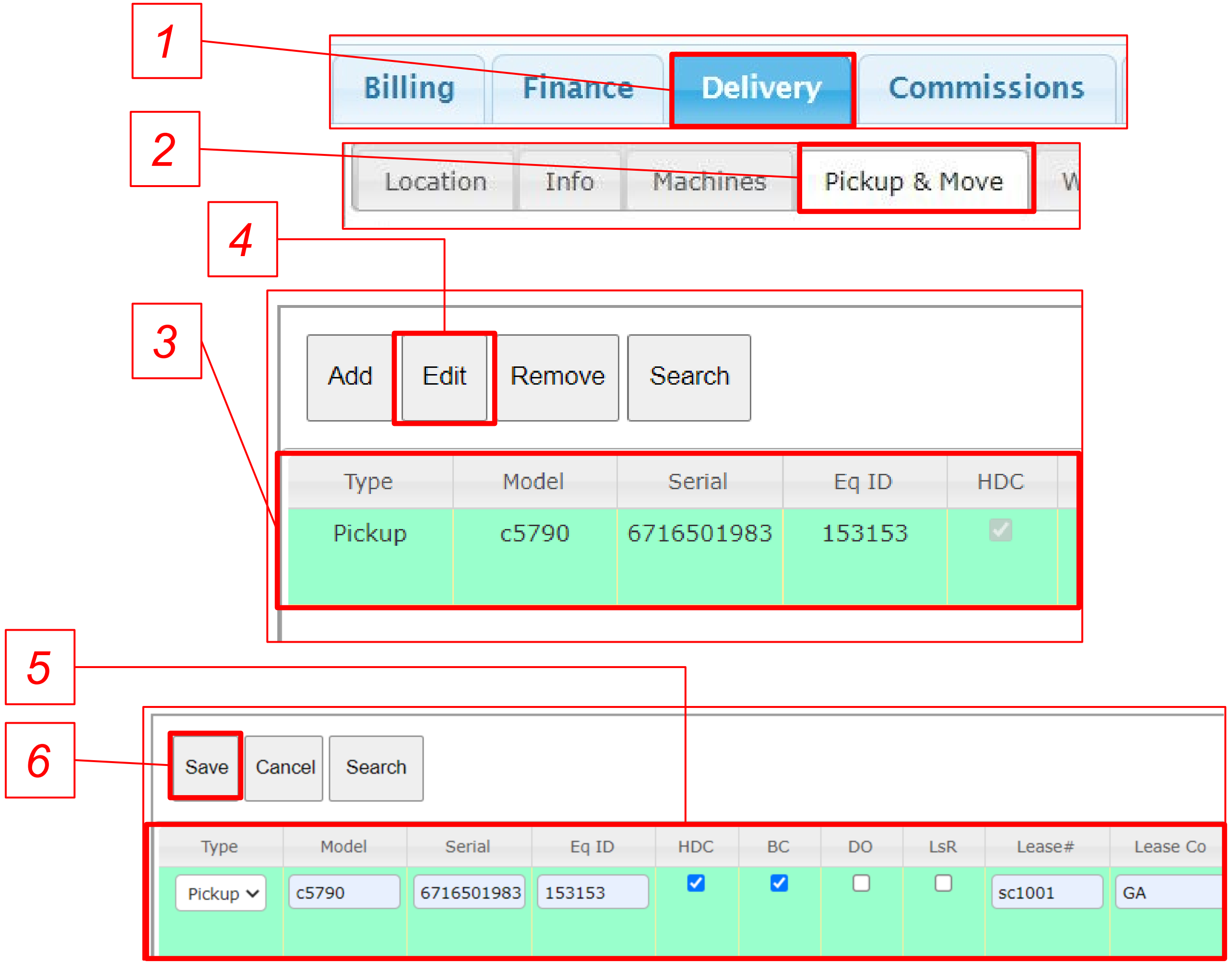
If existing assets are listed at this location, you can click the *Search* button to perform a lookup and automatically bring their information in, rather than typing it manually.

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:

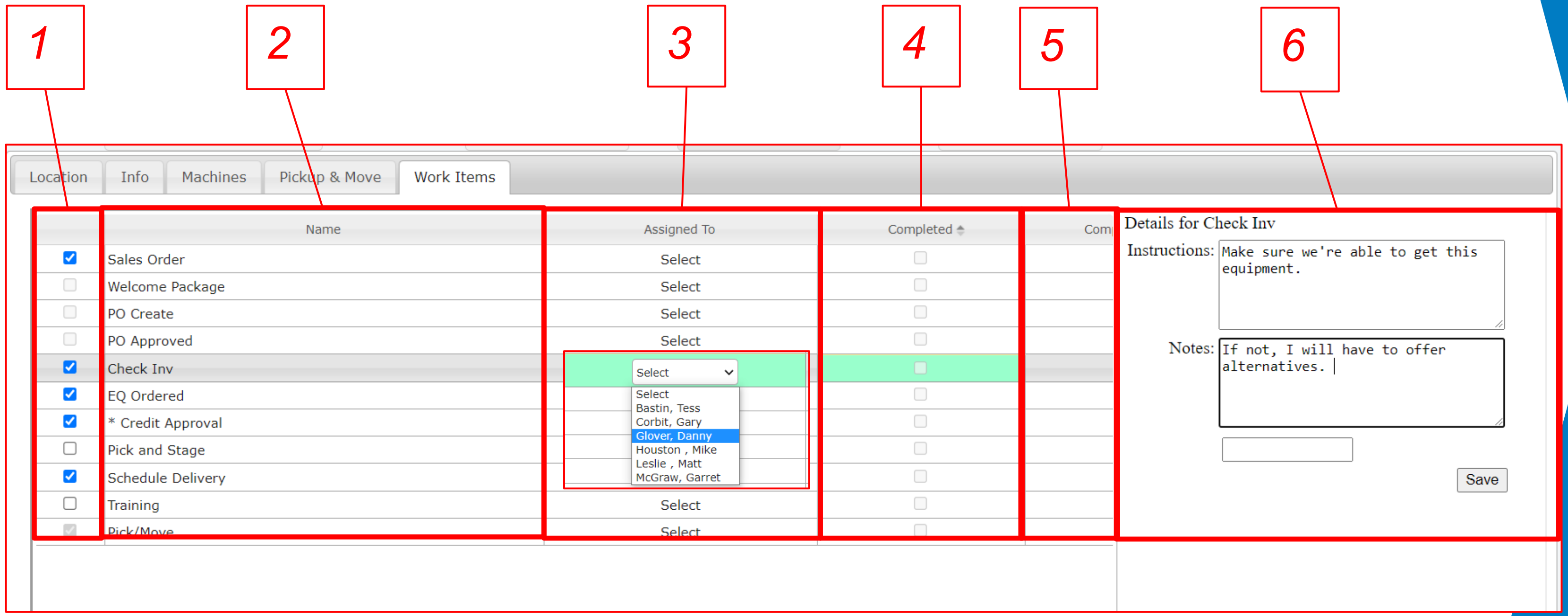
To delete a delivery job rather than editing it, click *Remove* rather than *Edit* in step 4.

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.*



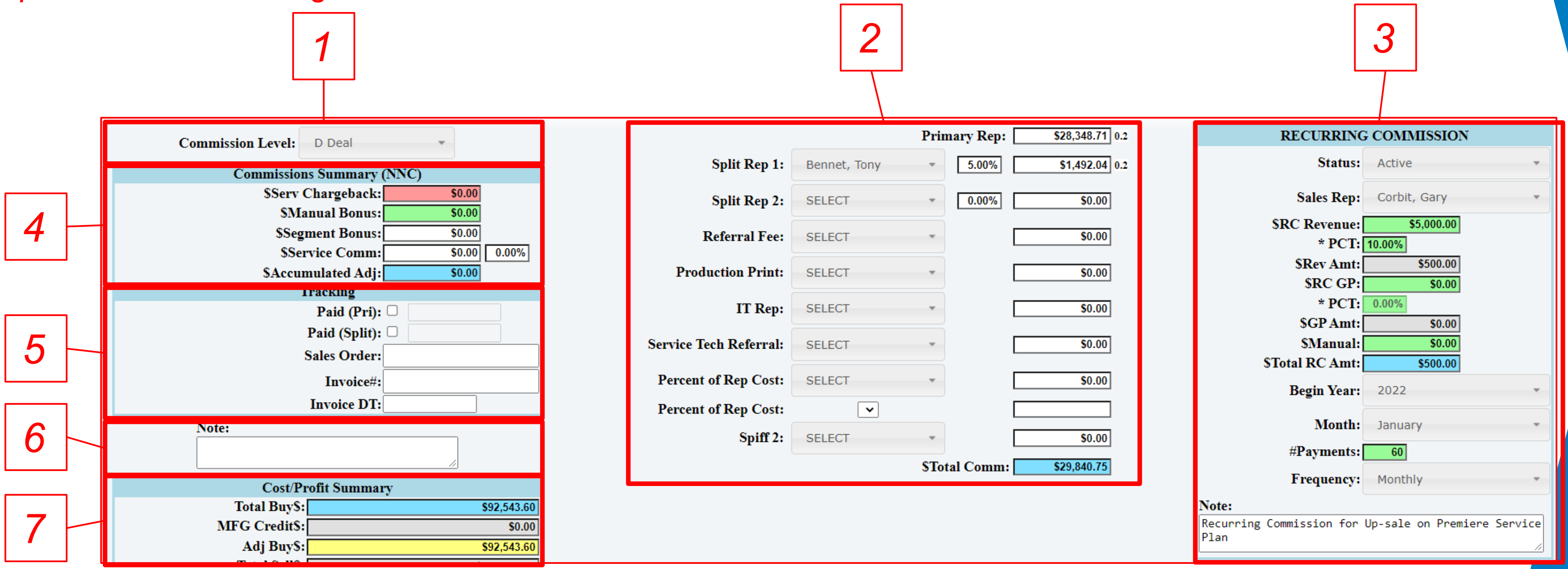
Proposal and Order Pricing: Commissions Tab

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)



Quick Tips:

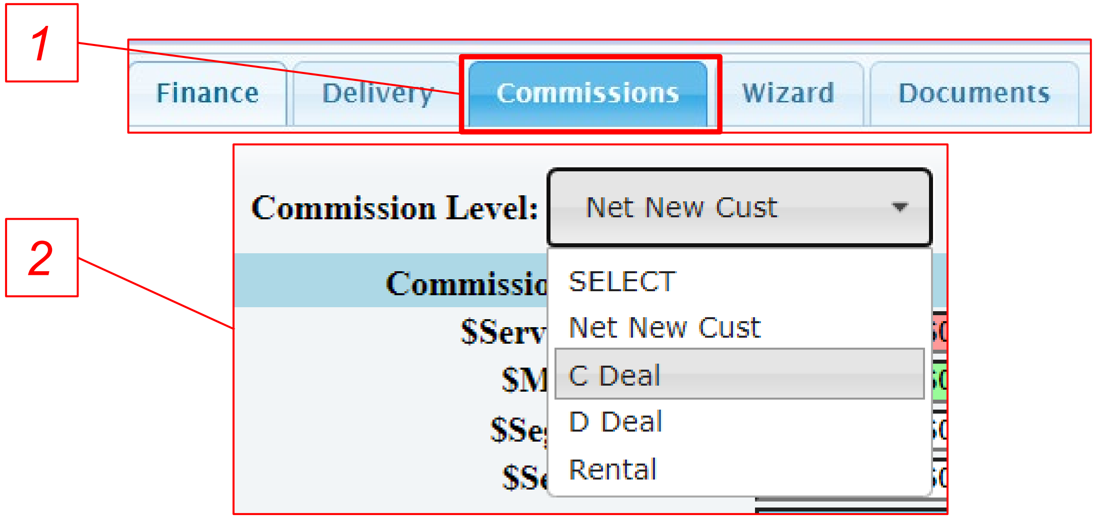
- Commission level and price level may exclude manufacturer credits and segment bonuses from a transaction. Consult your system administrator or sales manager if you have questions.
- Below the information displayed in this screenshot you will see a *Cost Profit Summary*, the same as in the *Pricing* tab. See page 134 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:

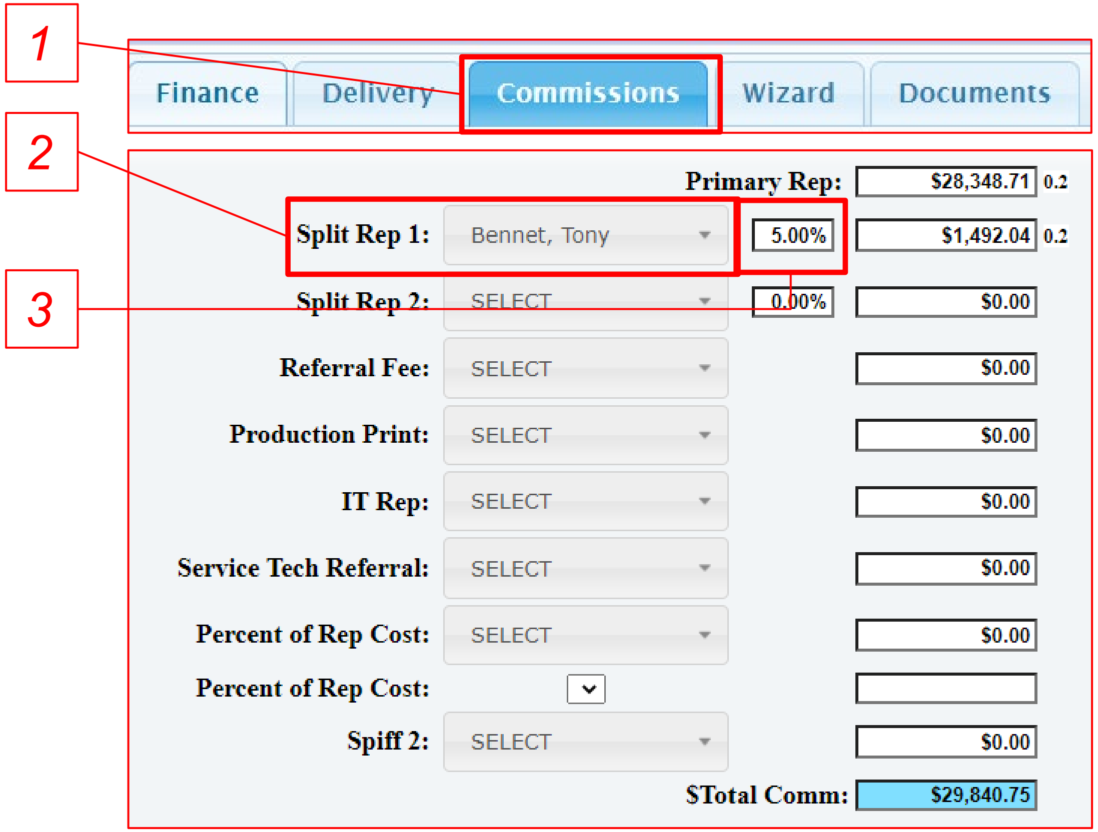
Your commissions percentage is represented by a multiple to the right of the Primary Rep Text Box. In the example to the right, the commission rate for the deal is 20%.

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.

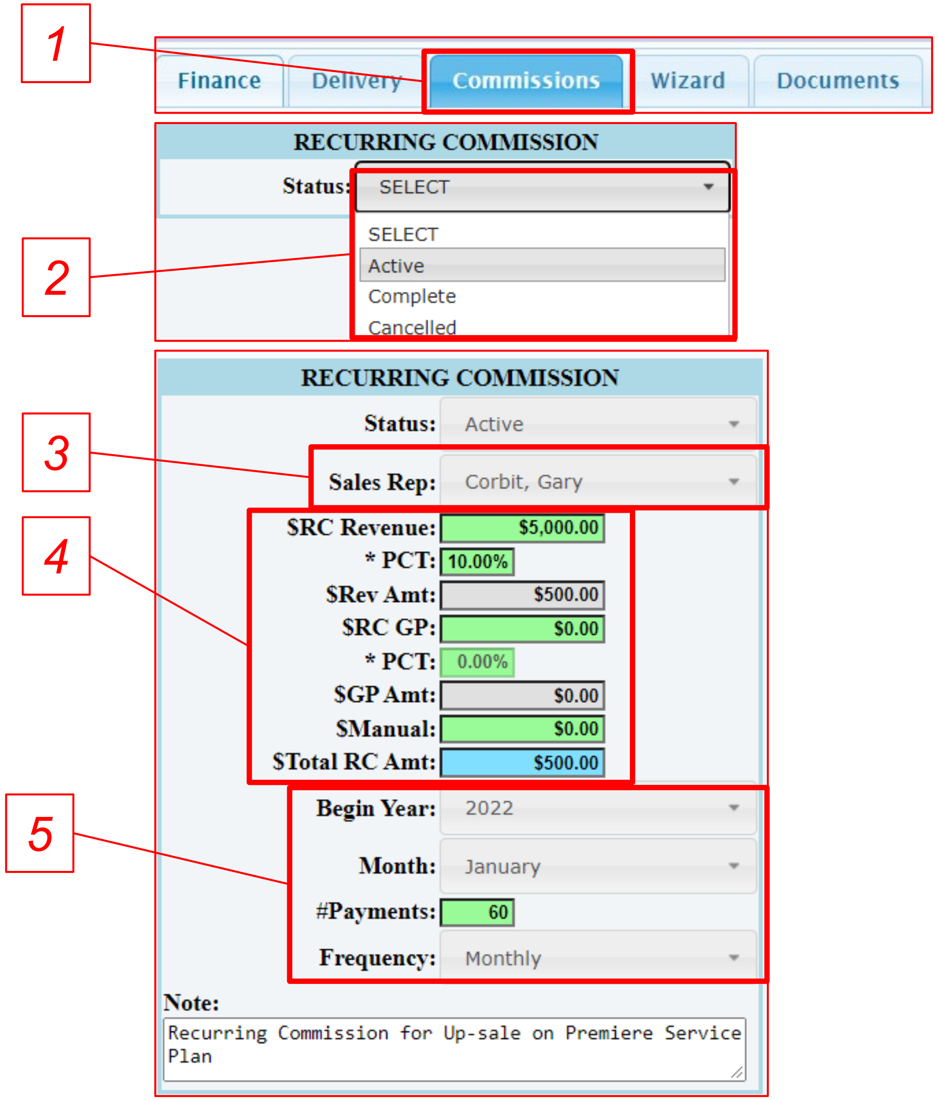


How To: Set Up Recurring Commissions For An Order

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:

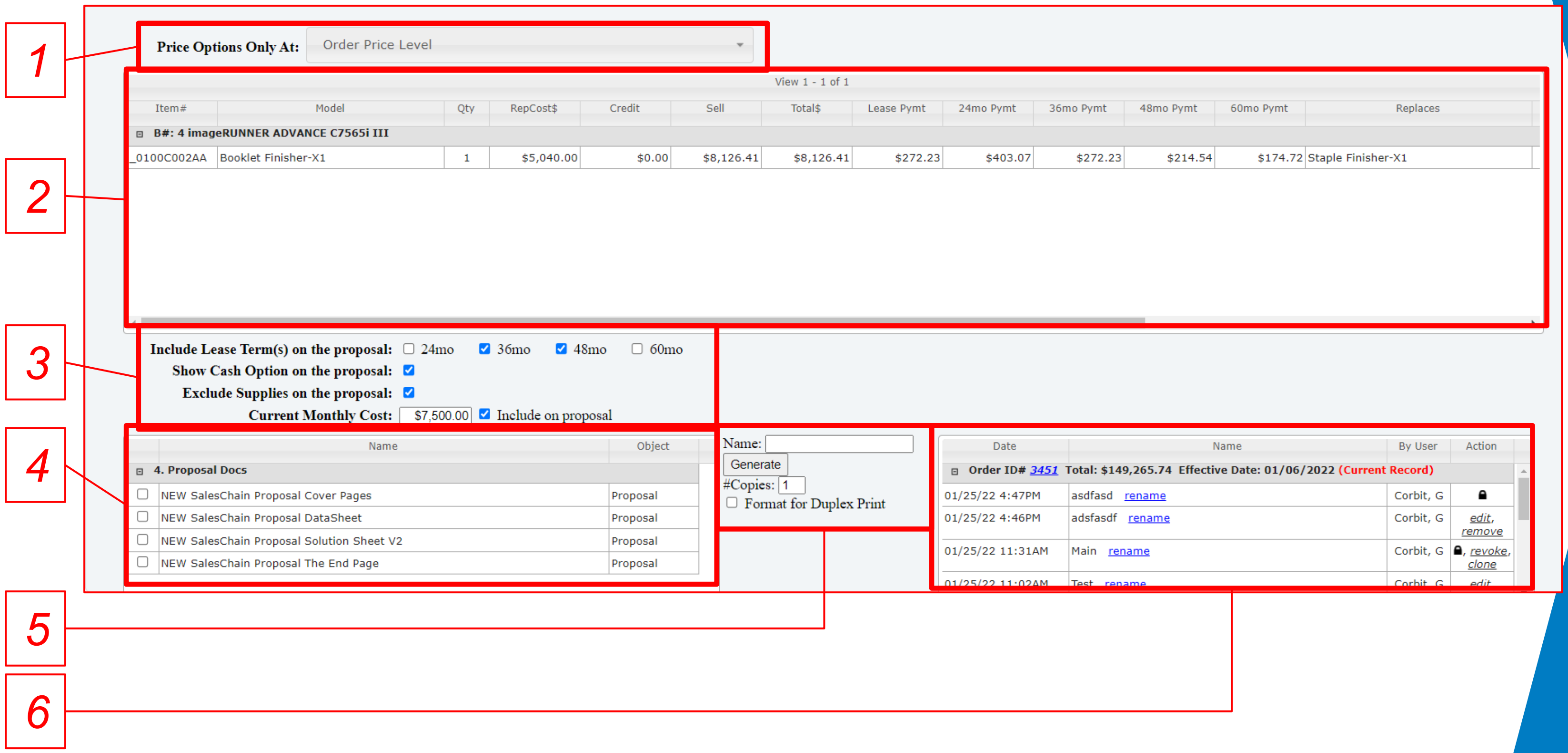
- *Active* is an open status for split rep commissions, meaning your rep will continue to get paid out for this deal at the appropriate interval. *Complete* or *Cancelled* are closed statuses, which will cease payments.
- You may add an internal only note at the bottom of this dialogue

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:

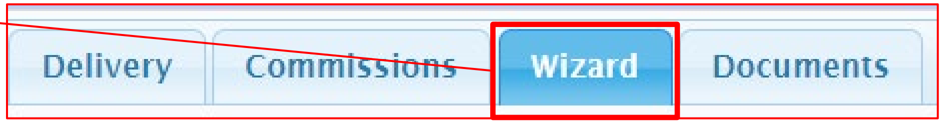
1) Select the price level for optional accessories
2) Optional Accessory dialogue
3) Select what information is included on the proposal document and enter current monthly cost
4) Select which pages are included in the generated proposal document
5) Name and generate a proposal document
6) Document generation history



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.

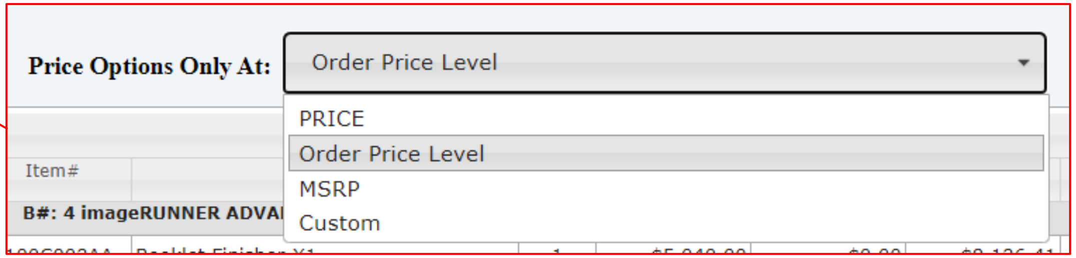
1



To change the optional accessory pricing level:

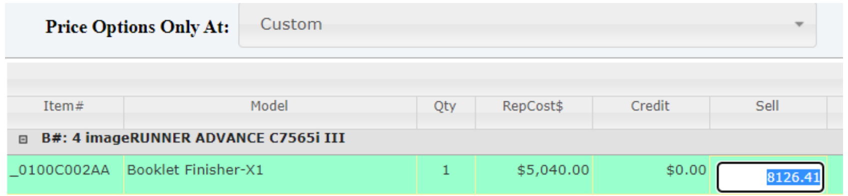
1. Navigate to the *Wizard* Tab
2. Select your desired price level from the *Accessory Price Level* Drop Down

2



Quick Tip:

Selecting the *Custom* price level will allow you to edit the accessory values in the table (Right)



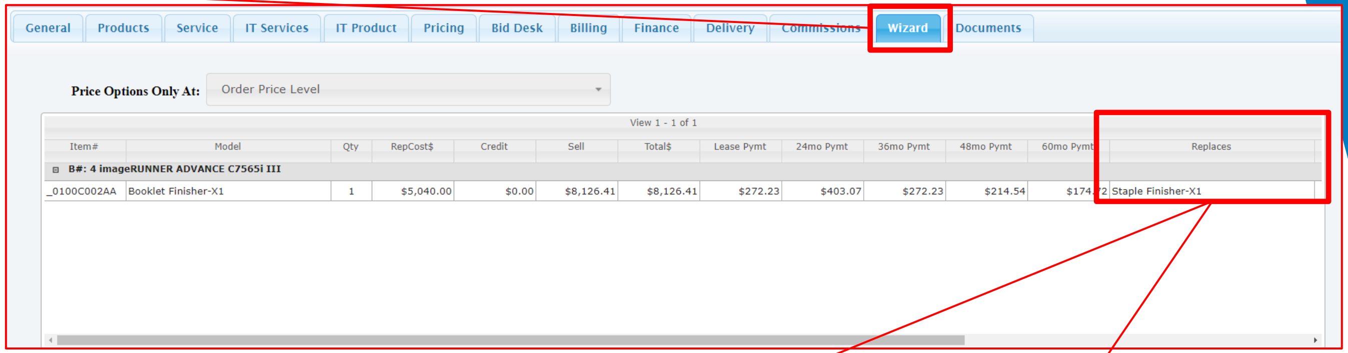
How To: Associate Optional Accessories For Upgrade

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.

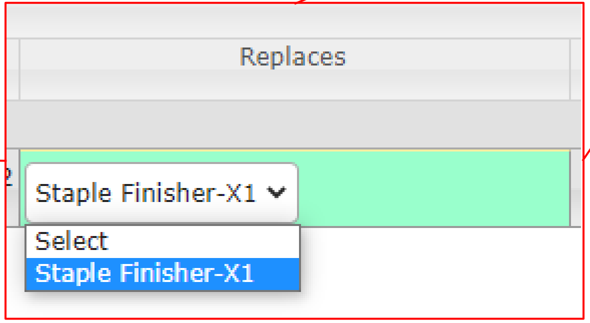
To associate an optional upgrade with a priced accessory:

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



2



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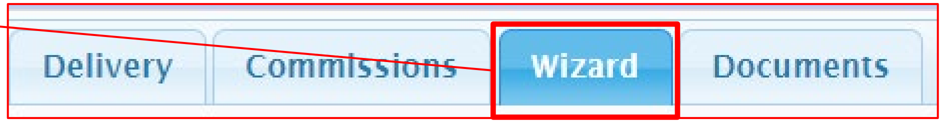
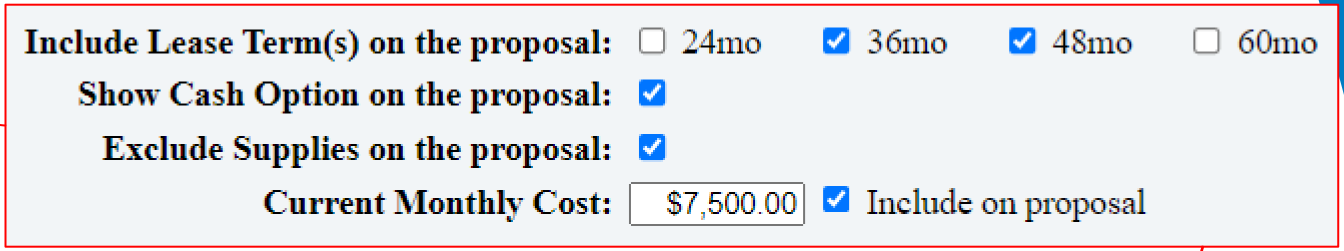
How To: Customize the Information Shown on a Proposal

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 164**.*

1



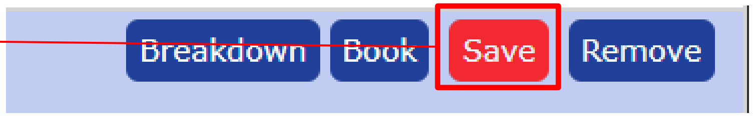
2

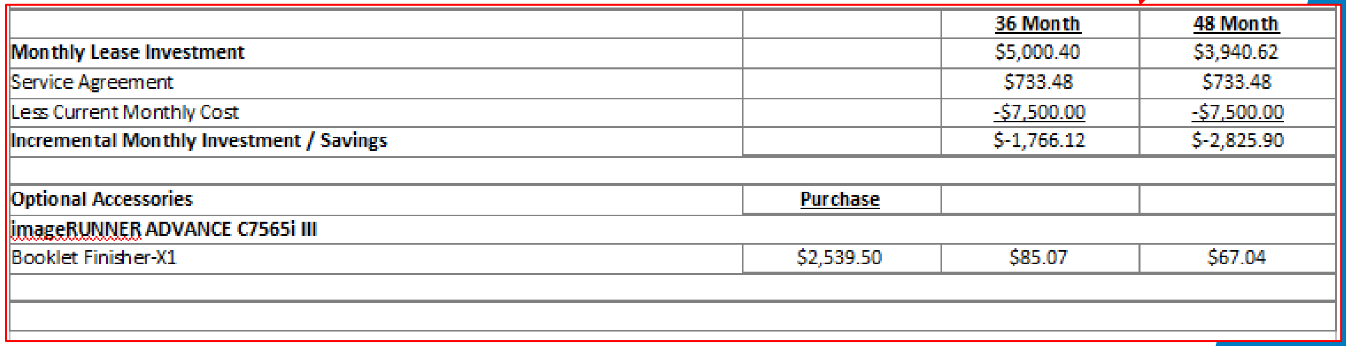


To Change the information displayed on your proposal document's solution sheet:

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

3





		36 Month	48 Month
Monthly Lease Investment		$5,000.40	$3,940.62
Service Agreement		$733.48	$733.48
Less Current Monthly Cost		-$7,500.00	-$7,500.00
Incremental Monthly Investment / Savings		$-1,766.12	$-2,825.90
Optional Accessories	**Purchase**		
imageRUNNER ADVANCE C7565i III			
Booklet Finisher-X1	$2,539.50	$85.07	$67.04

Quick Tip:

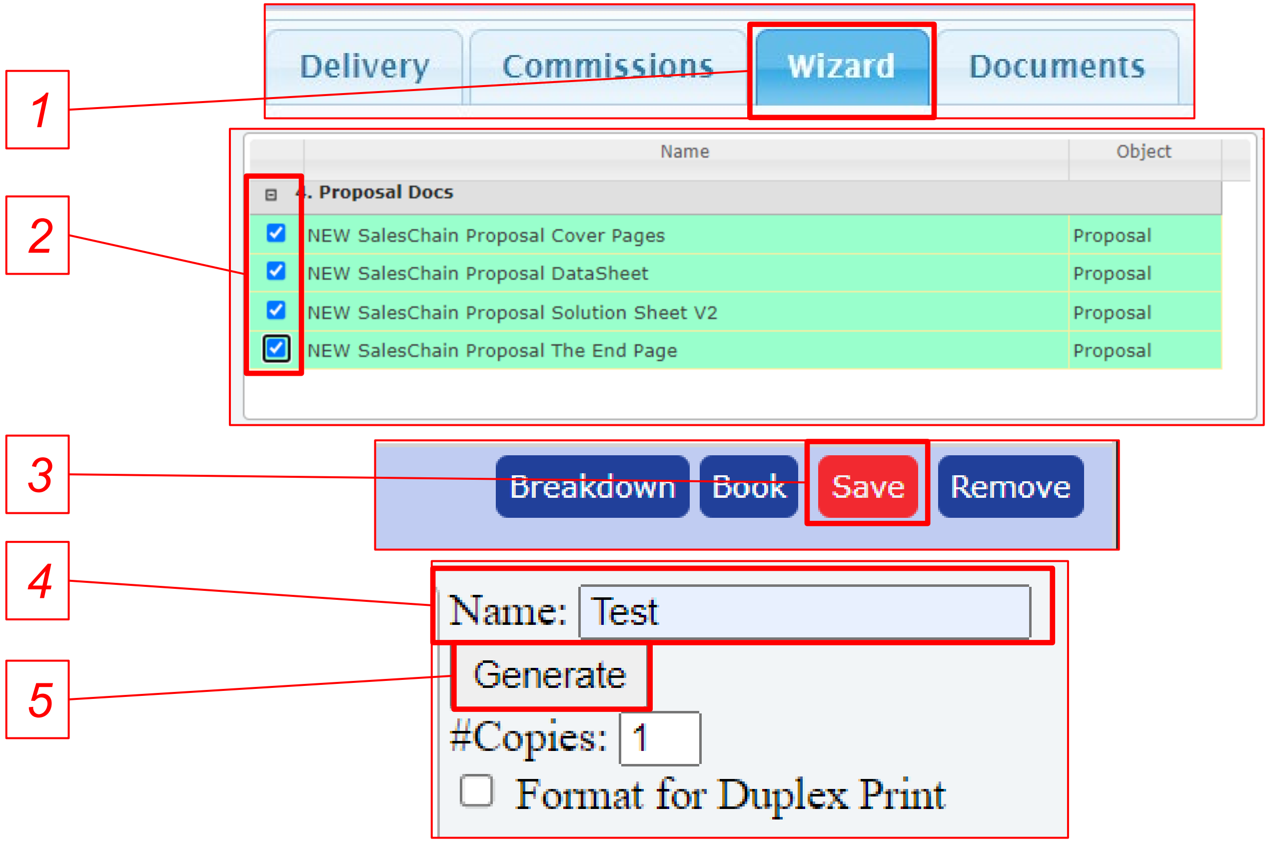
To include the monthly cost that your prospective customer is paying, you must enter a dollar value in the text box **AND** check the *Include on Proposal* box.

How To: Generate a Proposal

Once you have customized the information you want to display on your proposal (see page 163) you are able to generate a proposal document.

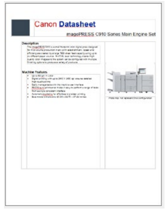
To generate a proposal:

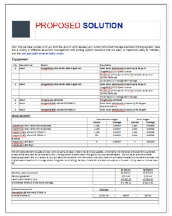
1. Navigate to the Wizard tab
2. Select the pages you would like to include in your proposal document package. Note: SalesChain imports your proposal document templates, so the available pages will vary, depending on system configuration
3. Click the red flashing *Save* button
4. Give your proposal document 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.





Proposal and Order Pricing: Documents Tab

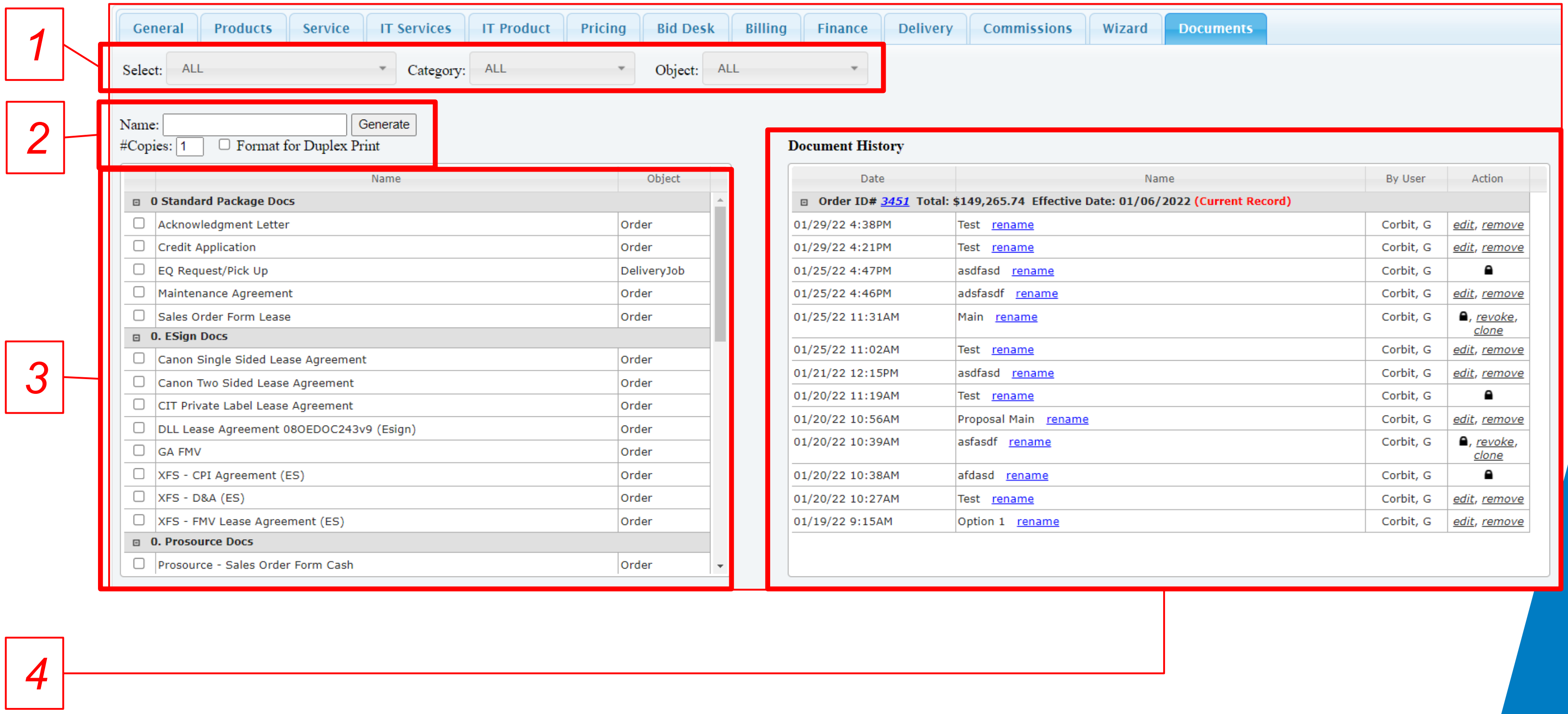
The Documents tab allows you to generate all relevant internal, delivery, and legal documents for this proposal or order.

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 related to this order will be displayed here. You can view, rename, edit, clone or revoke documents here (See pages 166 - 172)

Quick Tips:

Documents sent for e-sign will be locked from editing and will display a lock icon in the *Action* column.

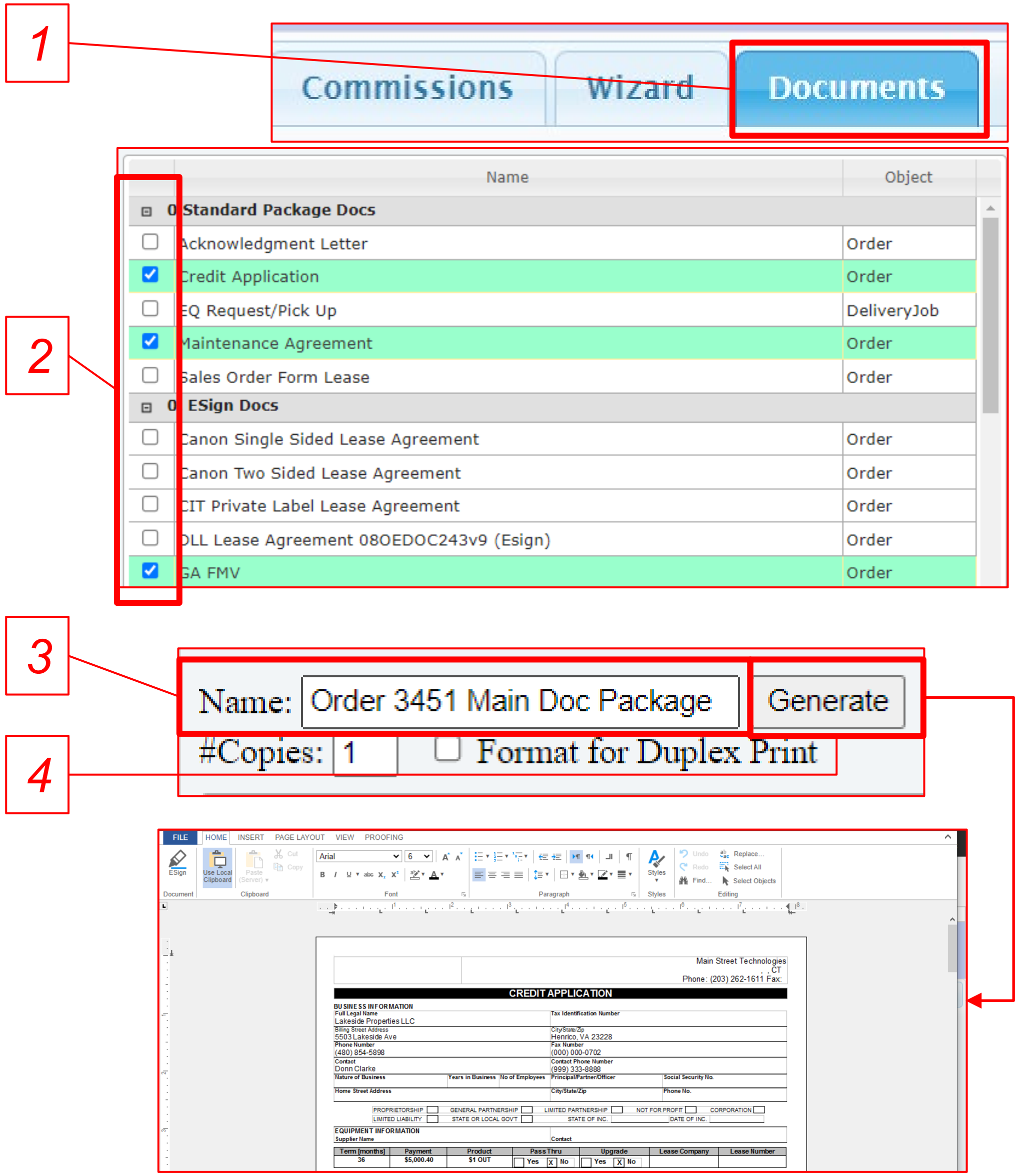


How To: Generate a Document Package

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.

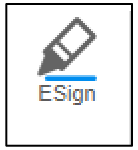
To generate a document package:

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.

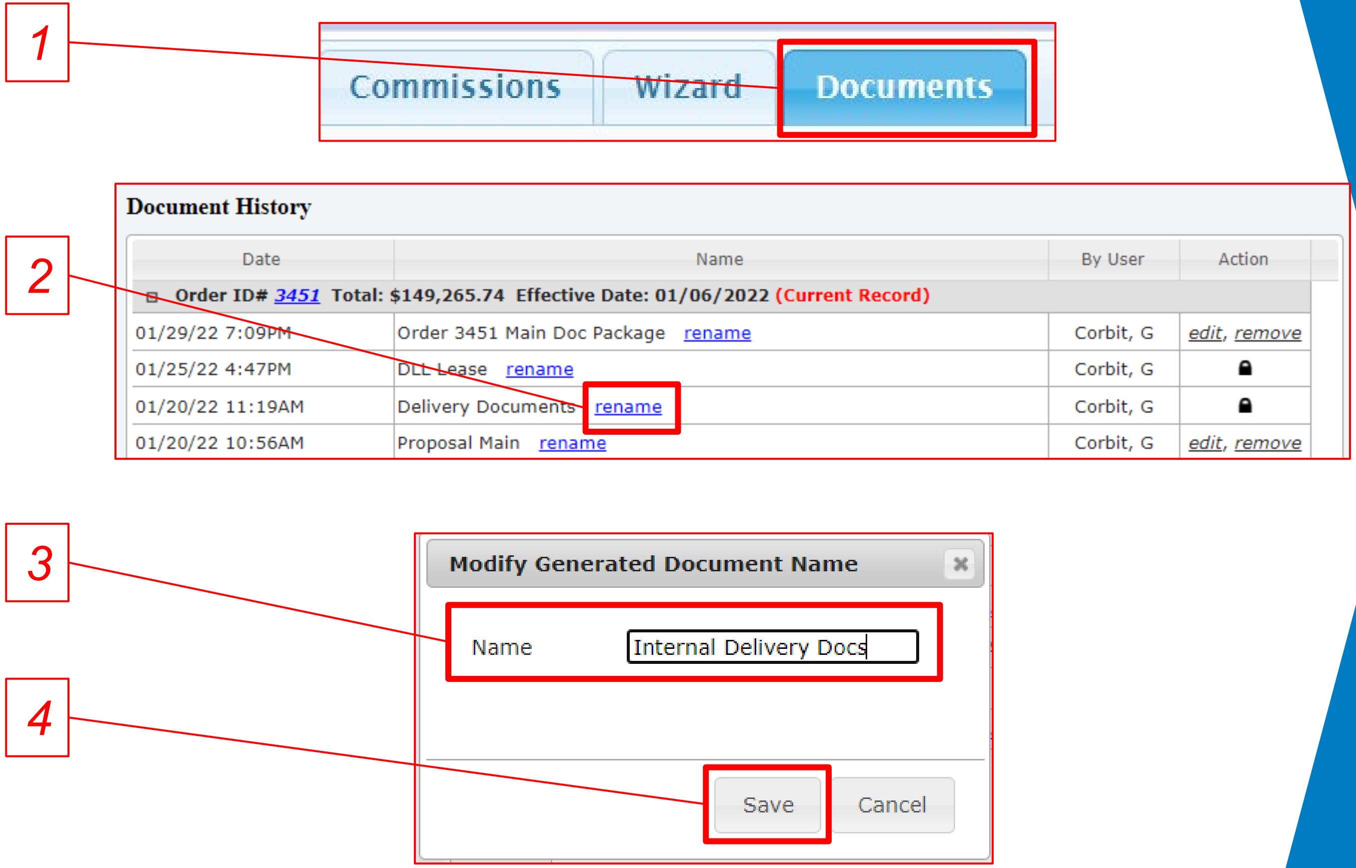


How To: Rename a Document Package

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*



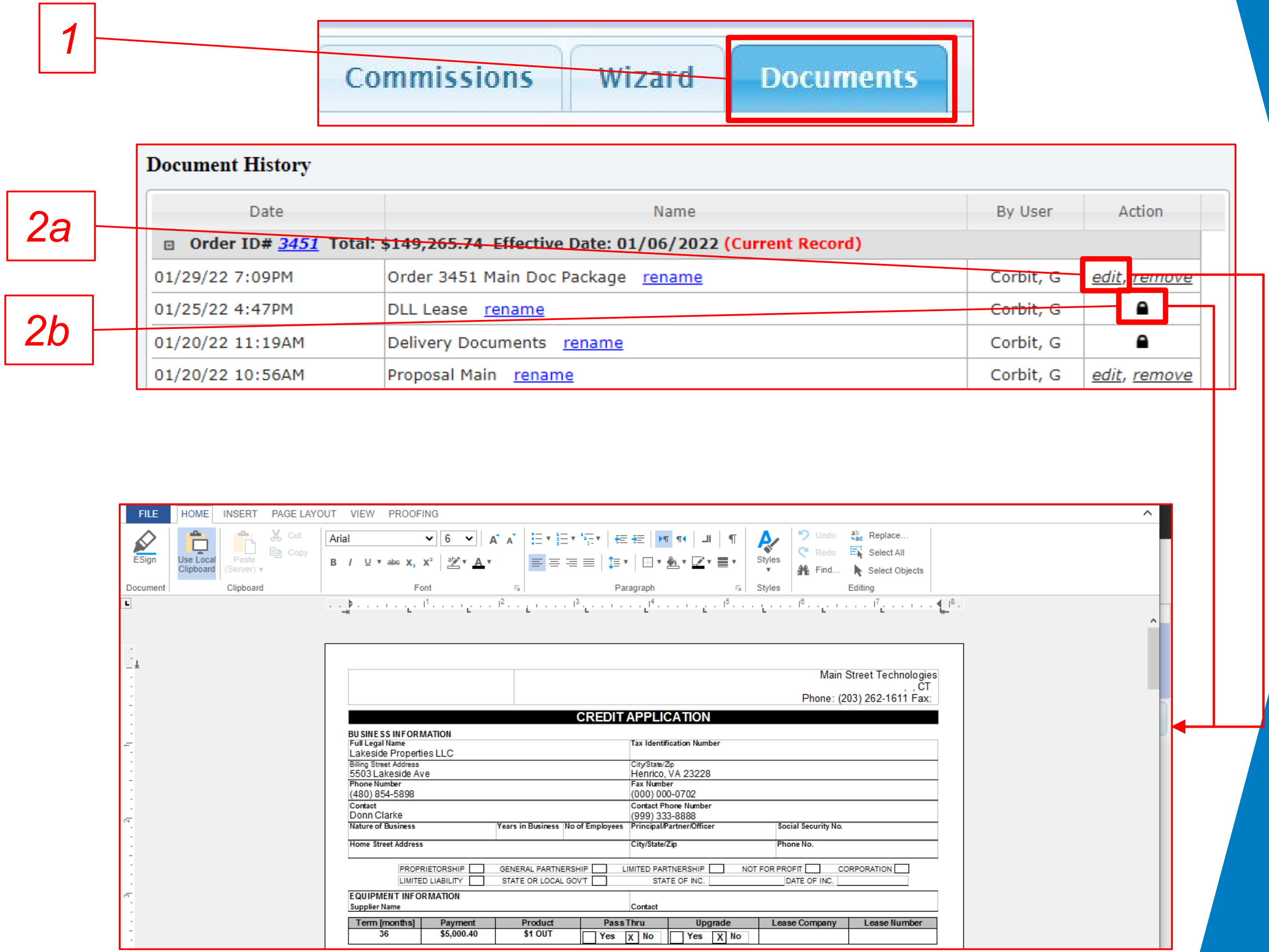
How To: View and Edit a Document Package

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 169 - 172 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 🔒

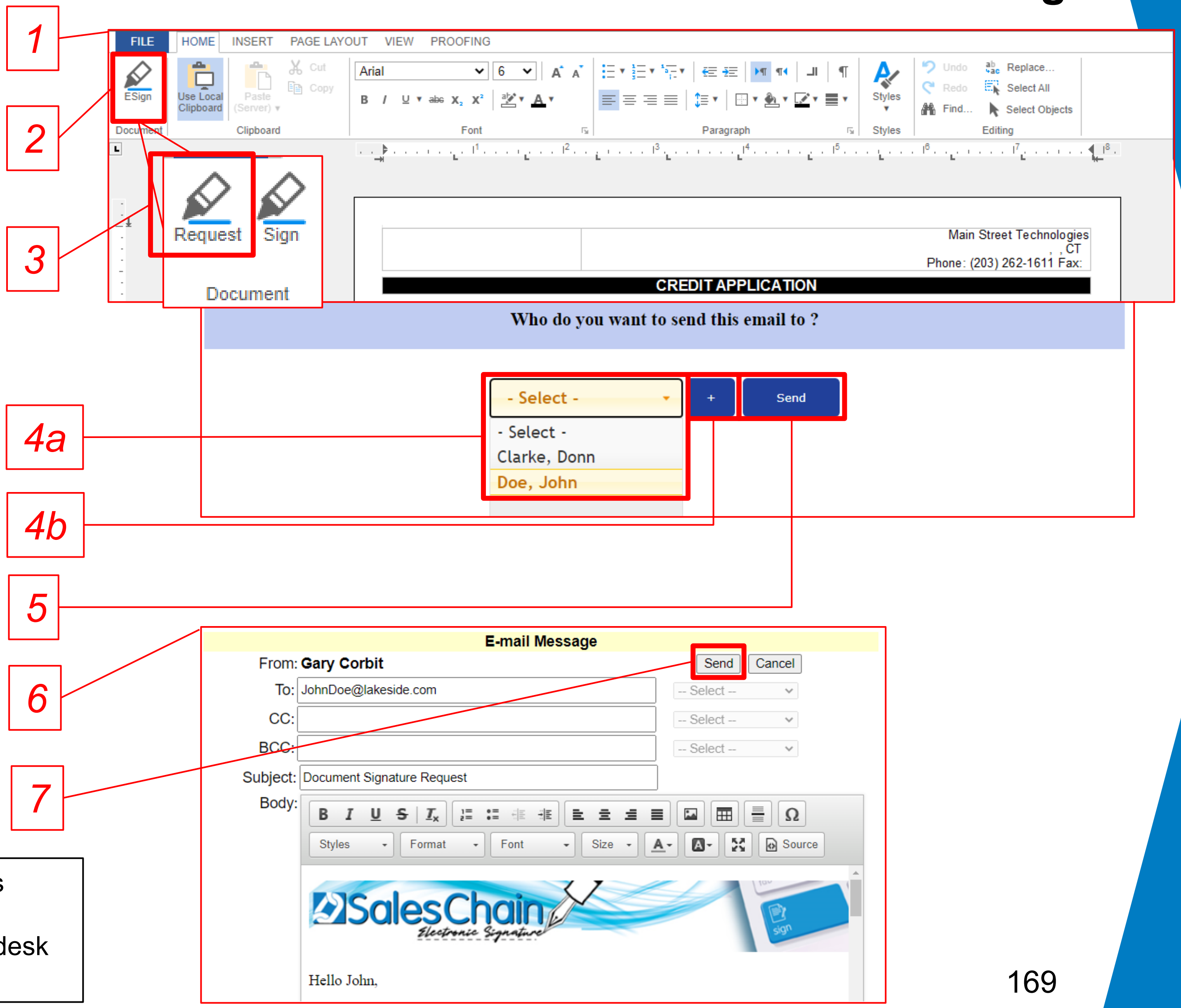


How To: Send a Document for e-Sign

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 166 and 168
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*

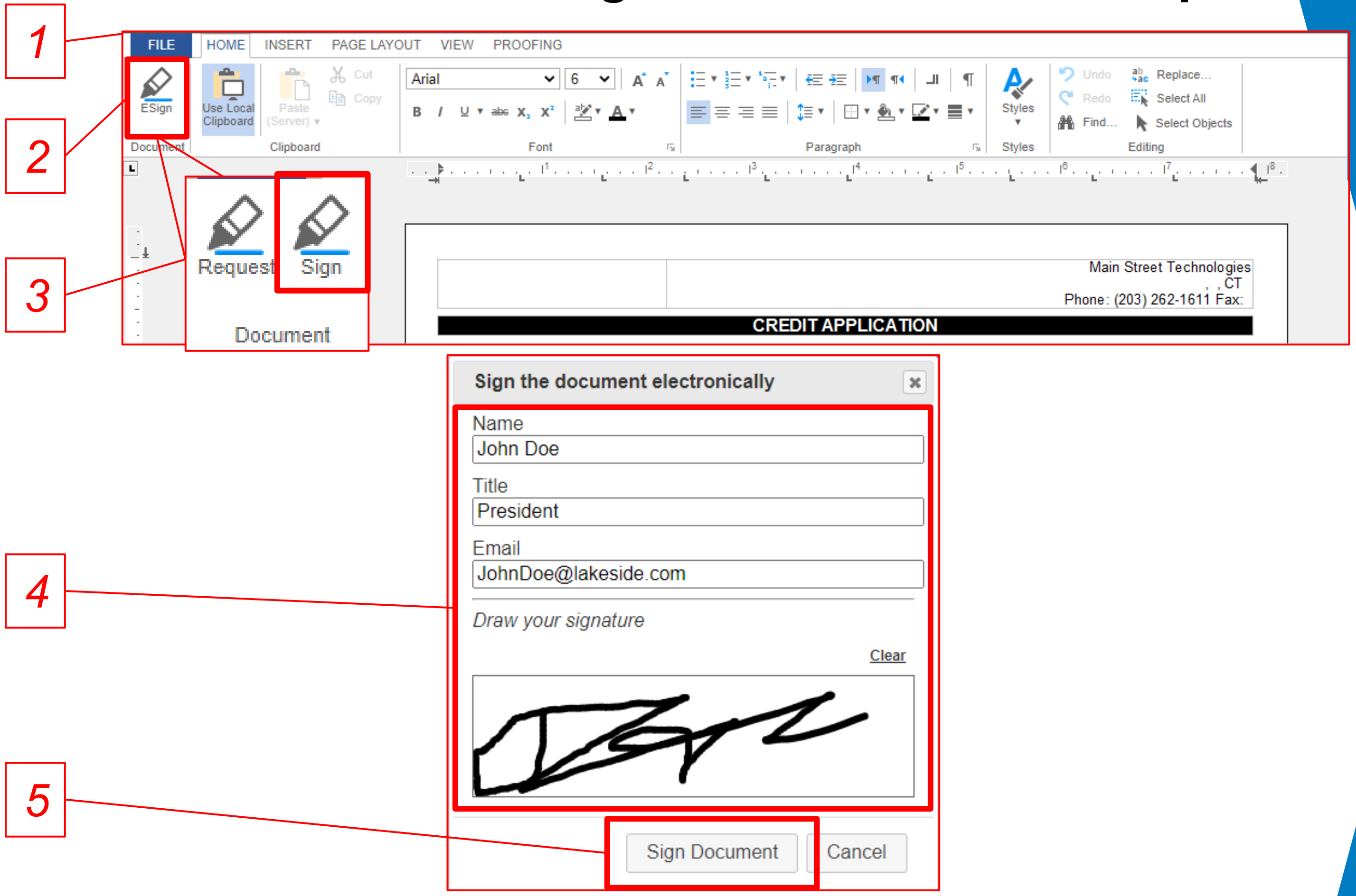


Quick Tips:

- 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 173)

How To: e-Sign a Document on the Spot

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 166 and 168
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.**

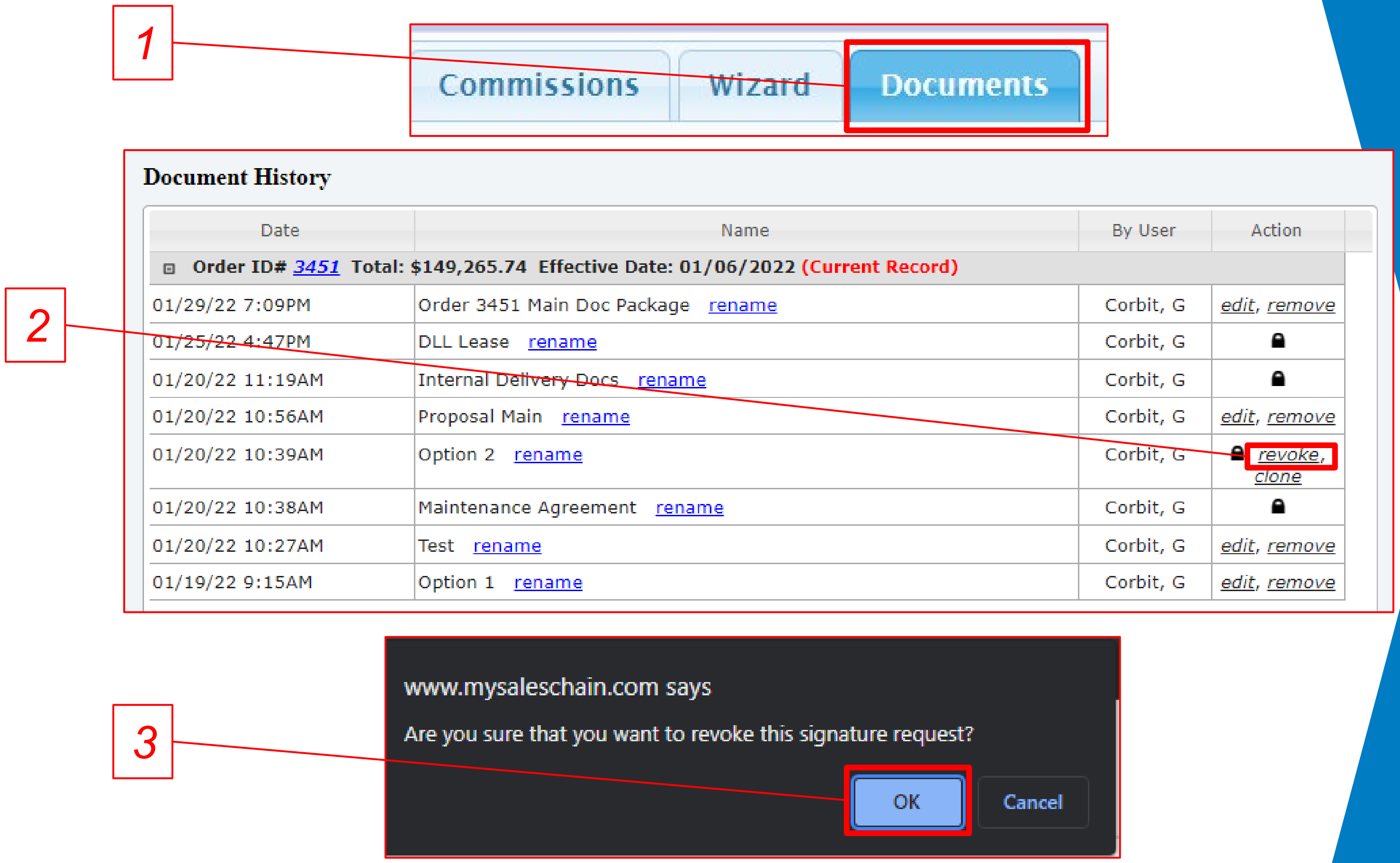
Quick Tip:
You can view a document's e-Sign process using the Signature desk (See page 173)

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*

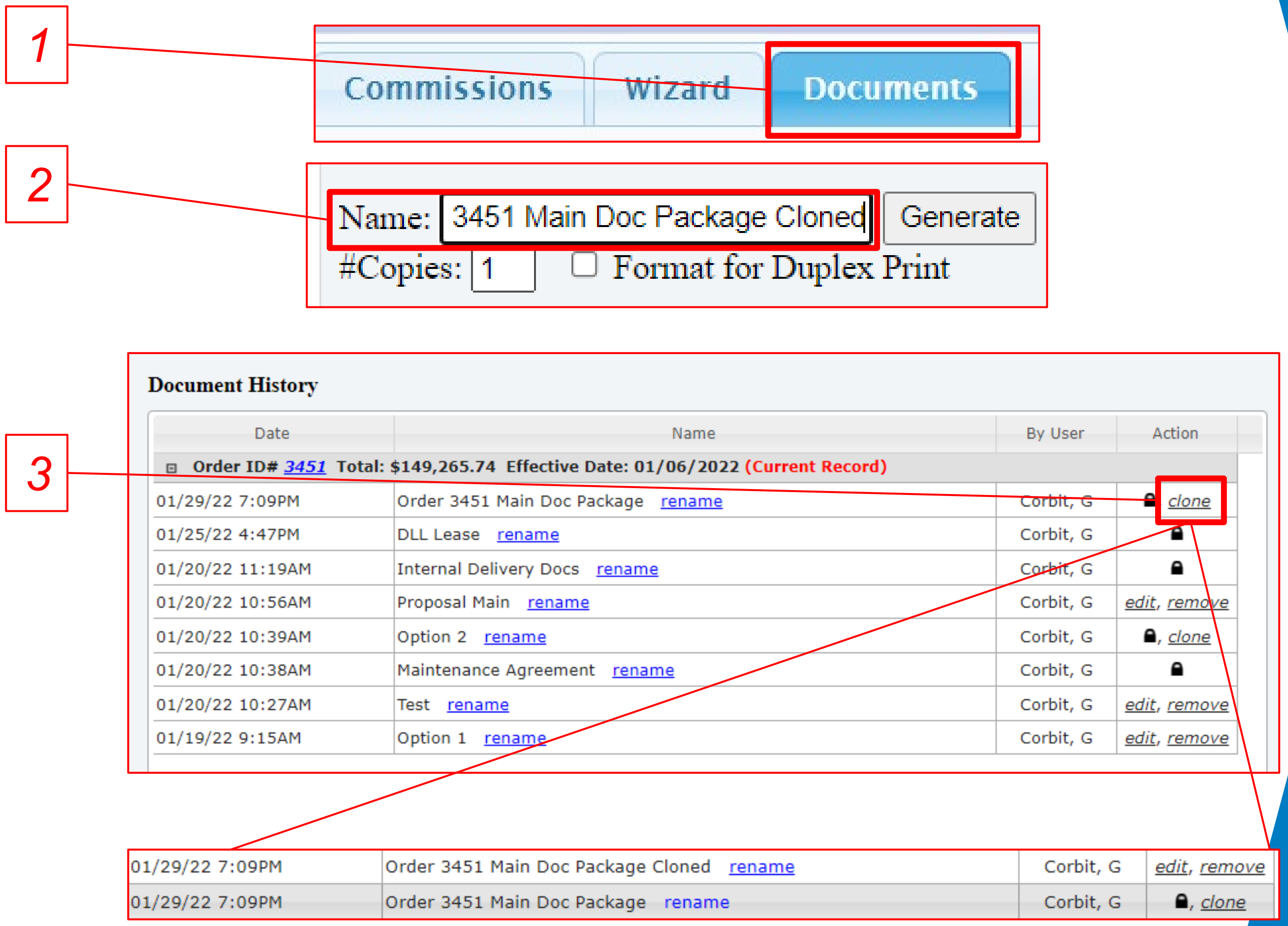


Quick Tips:

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.

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.

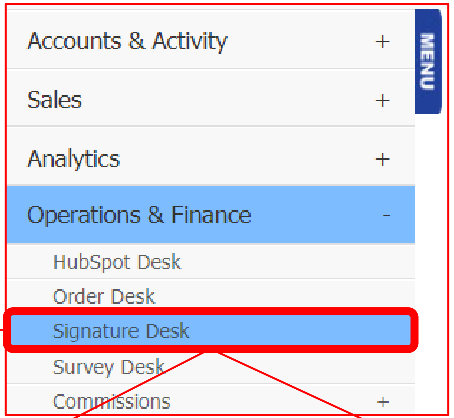
How To: Track e-Sign Progress

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.

1



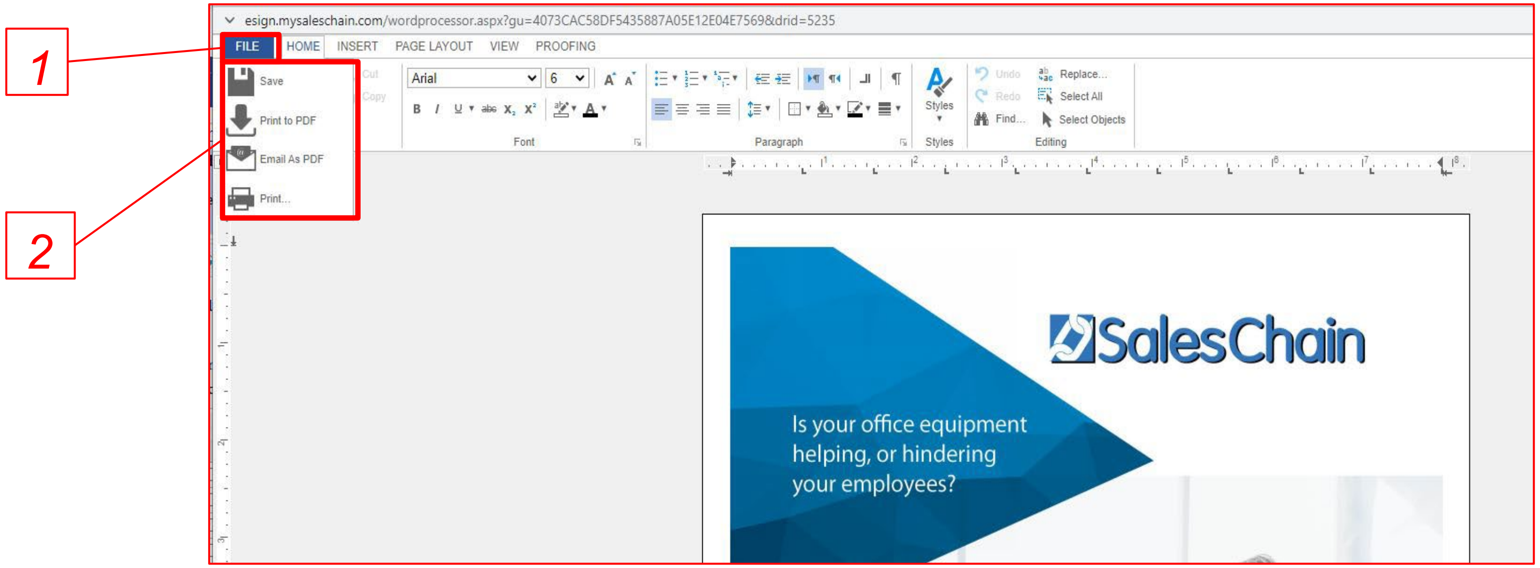
2

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 166.

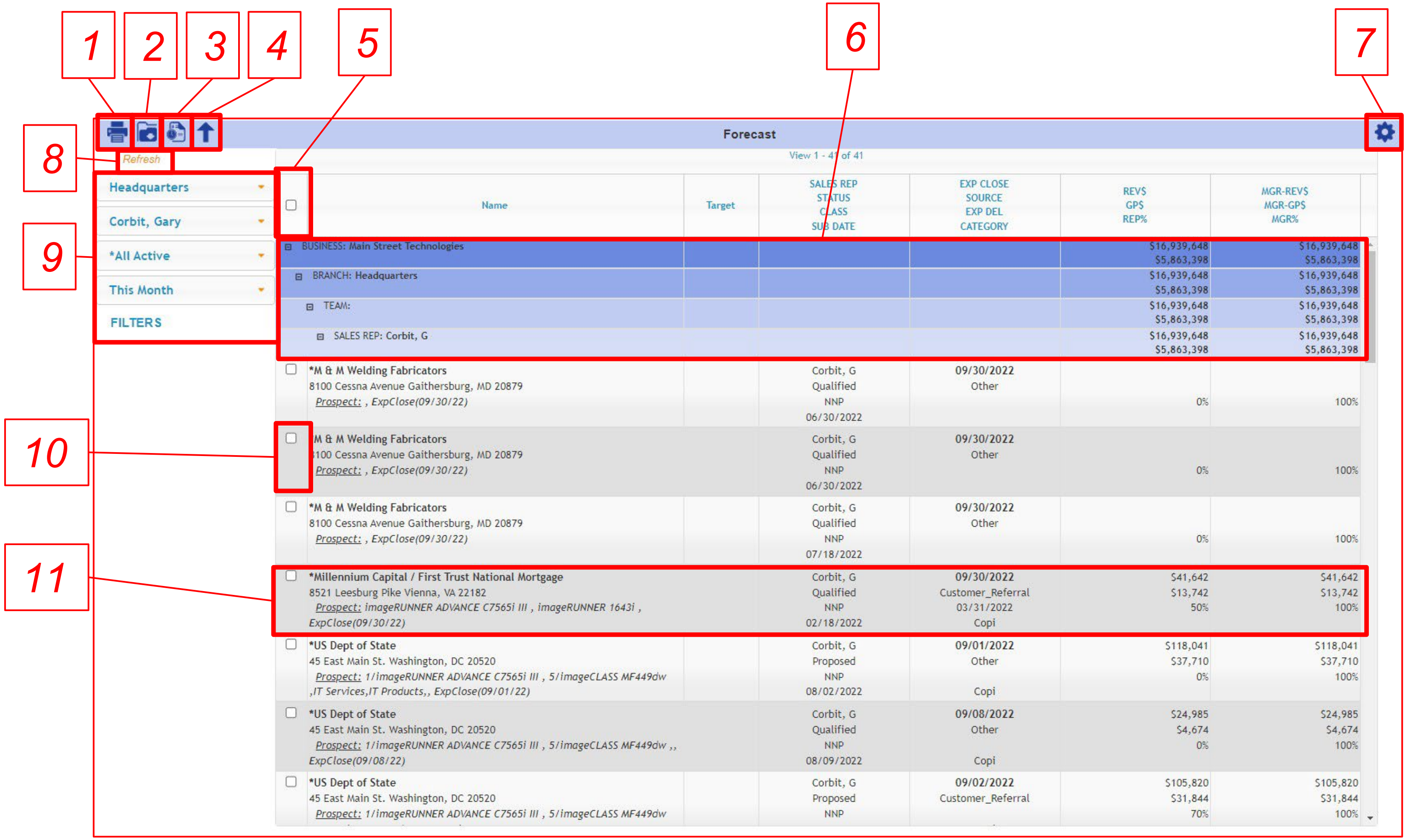
5

Forecasting:

Forecasting Views and Tools for Sales Representatives and Managers

Forecast Desk

The Forecast desk displays the leads which exist in your SalesChain system. Leads can be searched, sorted and edited in bulk from this desk.



Key:

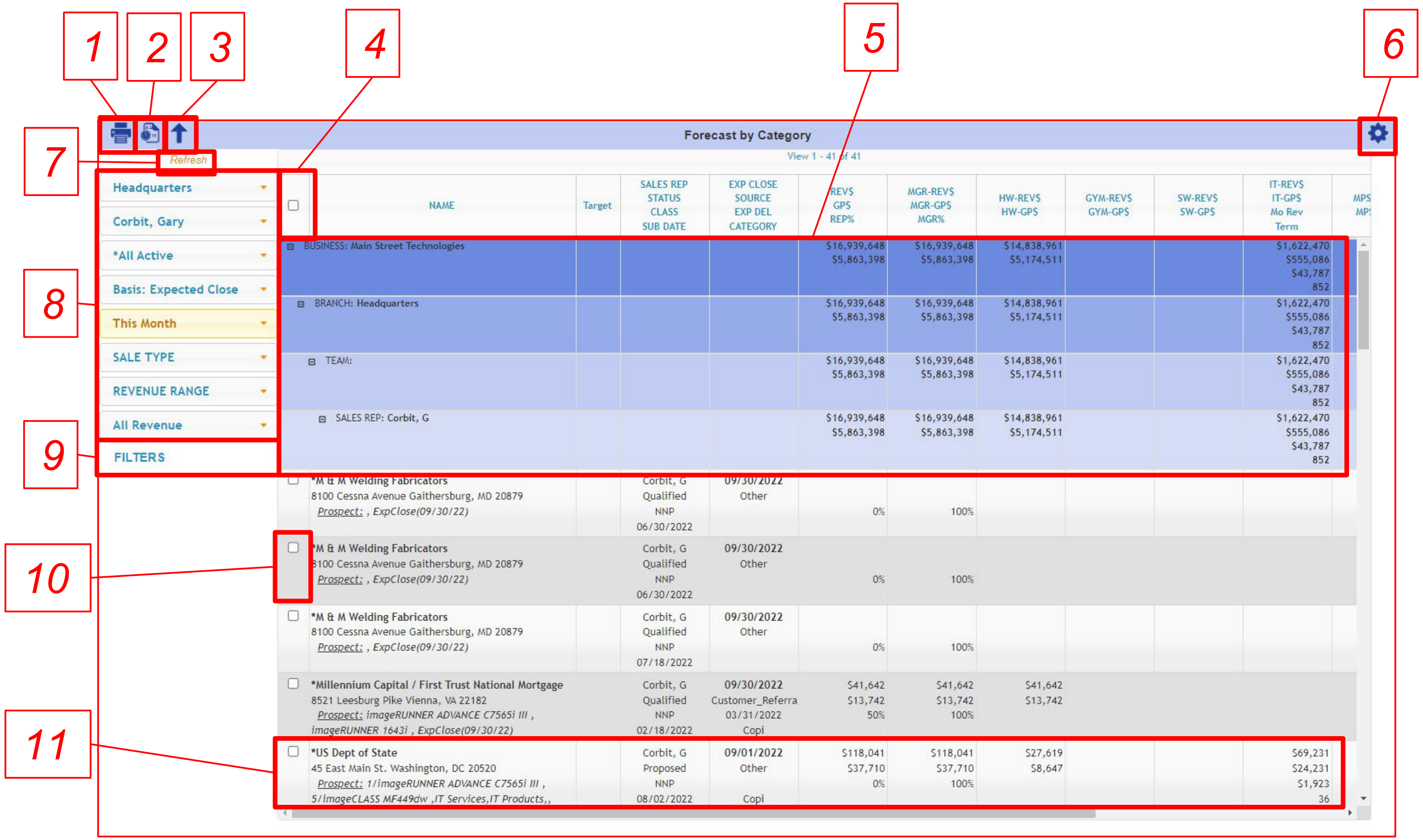
1) Print the contents of the forecast *(Permission Pending)*
2) Download the contents of the forecast *(Permission Pending)*
3) Email the contents of the forecast to you or others on a regular basis
4) Collapse the forecast report
5) Select all leads
6) Summary rows for business, branch, team and rep totals
7) Save your preferences for this screen
8) Refresh the forecast
9) Drop down search parameters
10) Select this Individual lead
11) Each row represents a lead

Forecast By Category Desk

The Forecast by Category Desk summarizes the leads which exist in your SalesChain system and segments potential revenue into categories. Leads can be searched, sorted and edited in bulk from this desk.

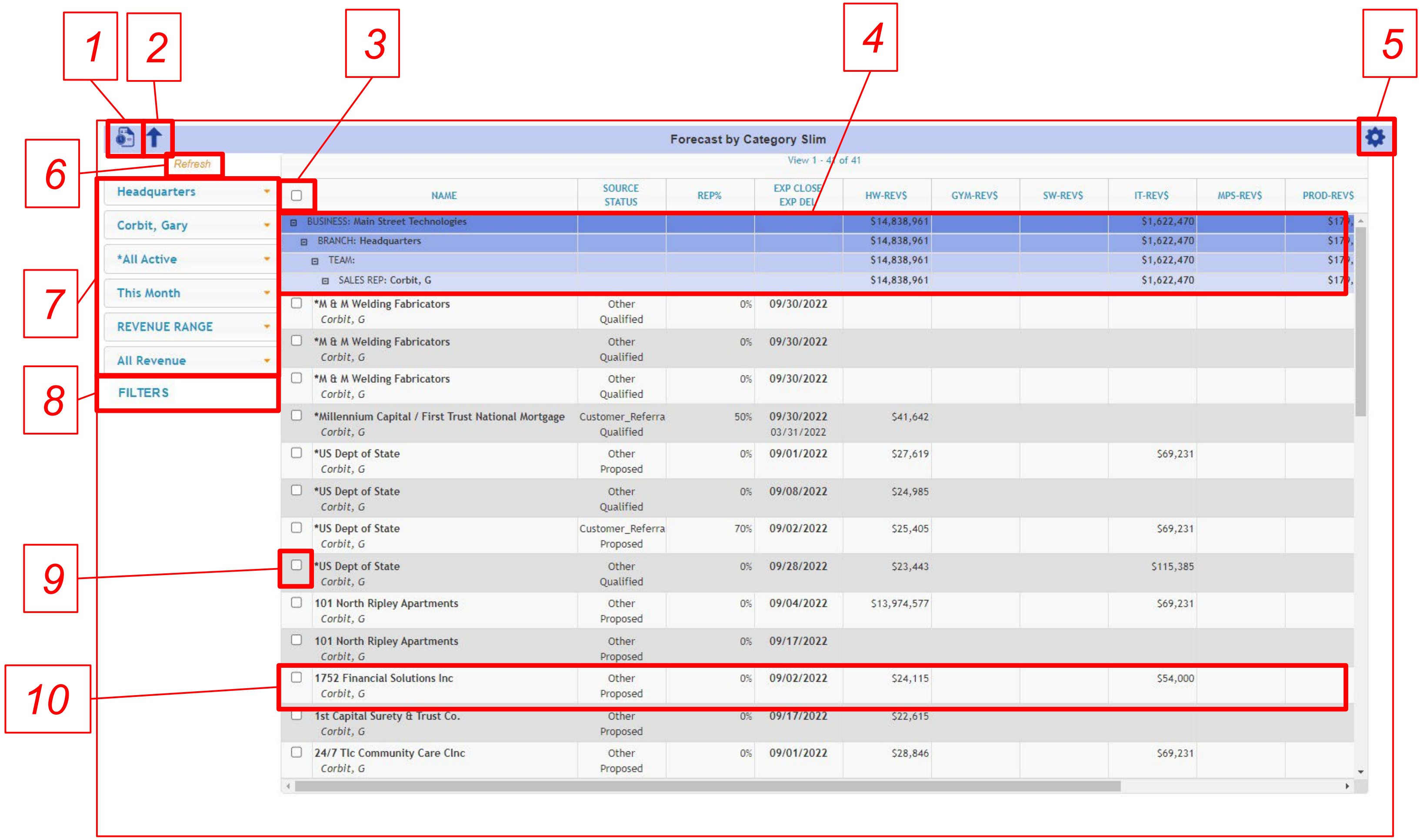
Key:

1) Print the contents of the forecast *(Permission Pending)*
2) Email the contents of the forecast to you or others on a regular basis
3) Collapse the forecast report
4) Select all leads
5) Summary rows for business, branch, team and rep totals
6) Save your preferences for this screen
7) Refresh the forecast
8) Drop down search parameters
9) Advanced Filters
10) Select this Individual lead
11) Each row represents a lead



Forecast By Category Slim Desk

The Forecast by Category Slim Desk summarizes the leads which exist in your SalesChain system and segments potential revenue into categories without the details shown in the Forecast by Category Desk. Leads can be searched, sorted and edited in bulk from this desk.

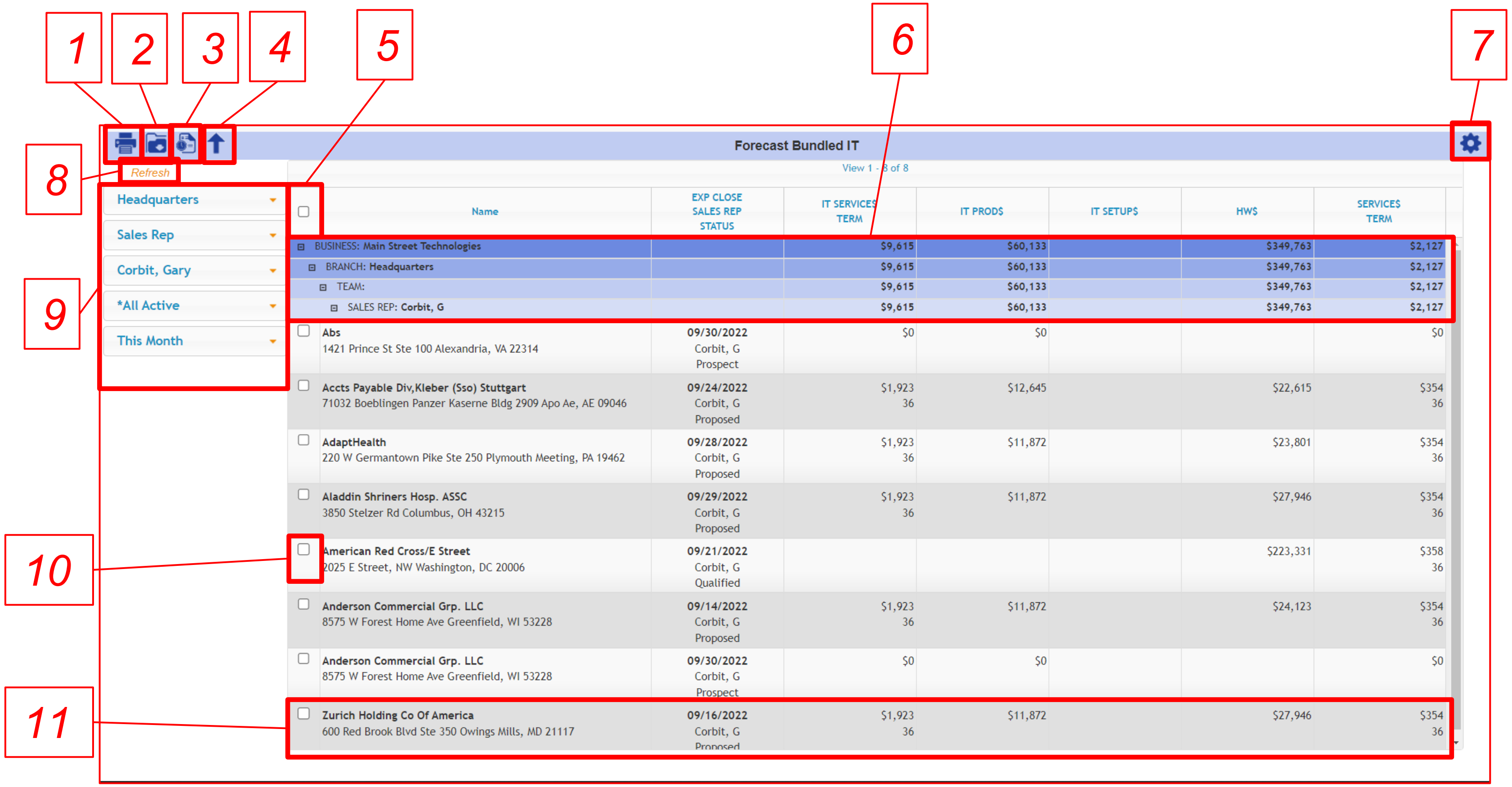


Key:

1) Email the contents of the forecast to you or others on a regular basis
2) Collapse the forecast report
3) Select all leads
4) Summary rows for business, branch, team and rep totals.
5) Save your preferences for this screen
6) Refresh the forecast
7) Drop down search parameters
8) Advanced Filters
9) Select this Individual lead
10) Each row represents a lead

Forecast Bundled IT

The Forecast for Bundled IT desk summarizes the leads which exist in your SalesChain system which include IT products or services and segments the revenue they contain into IT related categories. Leads can be searched, sorted and edited in bulk from this desk.



Key:

1) Print the contents of the forecast *(Permission Pending)*
2) Download the contents of the forecast *(Permission Pending)*
3) Email the contents of the forecast to you or others on a regular basis
4) Collapse the forecast report
5) Select all leads
6) Summary rows for business, branch, team and rep totals.
7) Save your preferences for this screen
8) Refresh the forecast
9) Drop down search parameters
10) Select this Individual lead
11) Each row represents a lead

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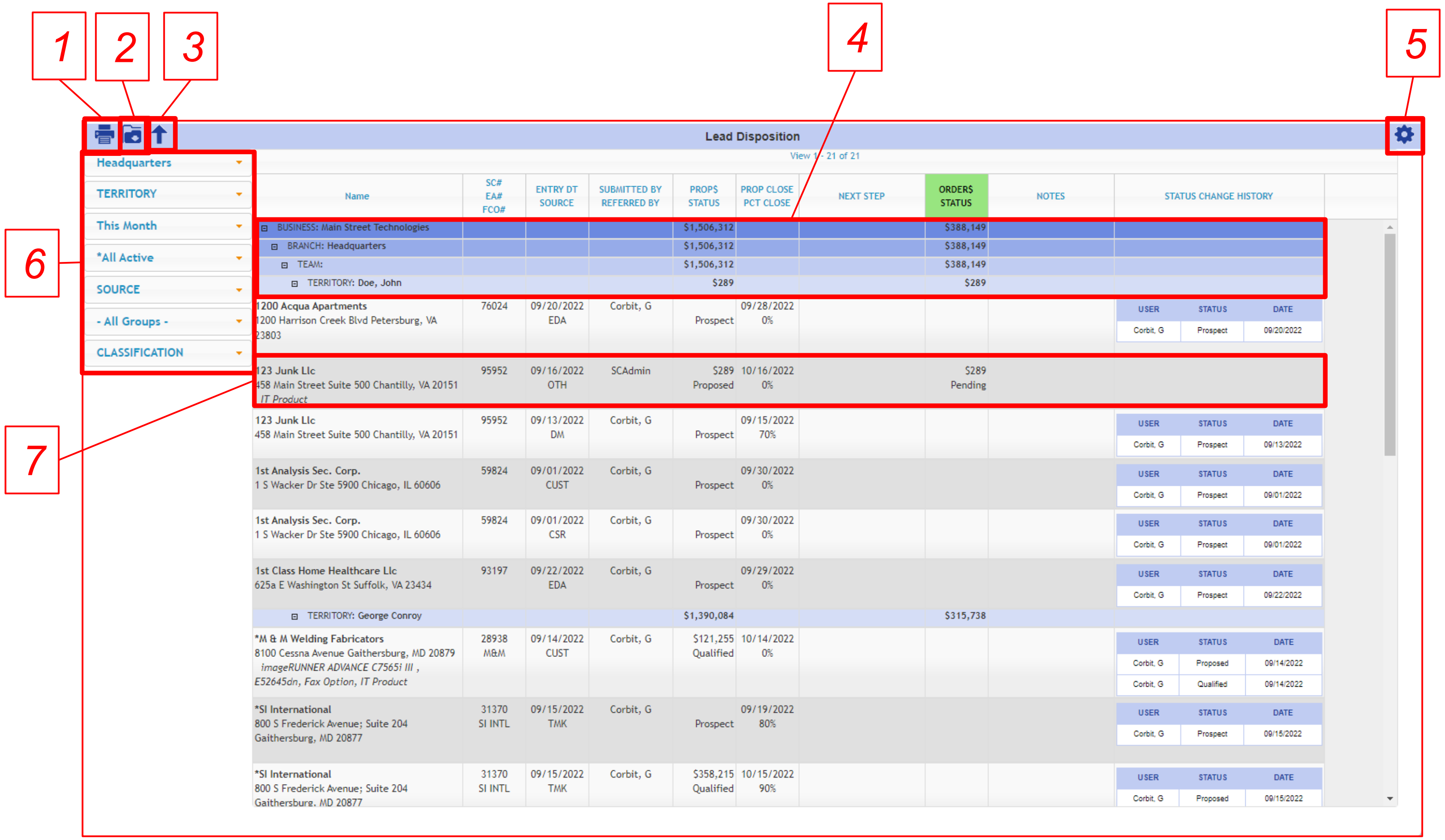
Lead Disposition Desk

The Lead Disposition desk bridges the gap between the Forecast Desks and the Order Desk. This view sorts leads by territory instead of strictly by rep and provides more detail into the status of orders that are linked to the leads shown.



Key:

1) Print the contents of the forecast *(Permission Pending)*
2) Download the contents of the forecast *(Permission Pending)*
3) Collapse the forecast report
4) Summary rows for business, branch, team and rep totals.
5) Save your preferences for this screen
6) Drop down search parameters
7) Each row represents a lead

Forecast Vocabulary

Forecast Vocabulary	
Tab Fields	**Description**
Lead	An opportunity to make a deal.
Expected Close Date	The calendar date by which the sales representative expects a lead to turn into an order.
Lead Status	
%Close	Also, *Prob Close* or *Confidence* – This percentage figure represents how sure a sales rep is that this lead will result in a closed deal.
%MGR Close	This percentage figure represents how sure a manager is that this lead will result in a closed deal.

Action Icons in the Forecast Views

Icon	Associated Action
	Print the contents of this report.
	Download the contents of this report.
	Schedule this report to be emailed to myself and/or others.
	Collapse this report to show totals for reps rather than individual lead values
	Expand this report to show all leads for each sales rep

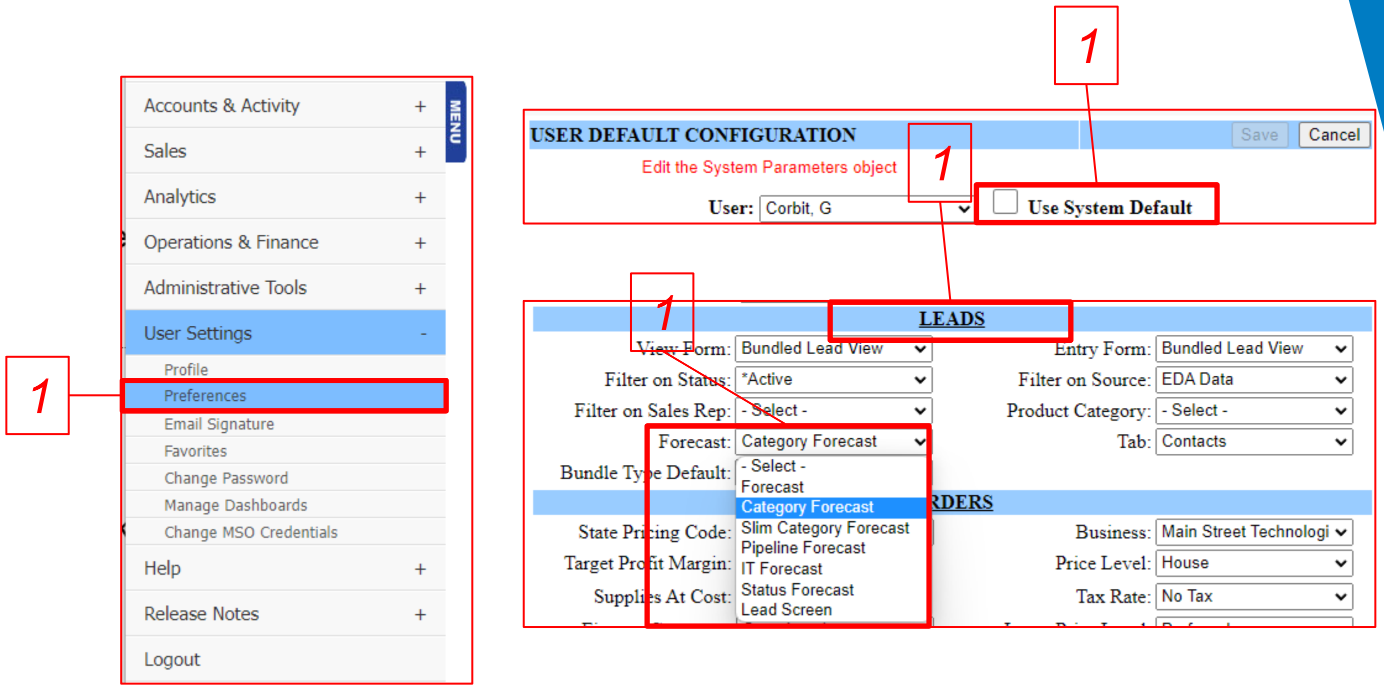
![SalesChain LEARN logo]

How To: Change Your Preferred Forecasting Desk

It is possible for users to change their default Forecast Desk within their user preferences.

To Change Your Default Forecasting Desk:

1. Navigate to Menu -> User Settings -> Preferences
2. Ensure that *Use System Defaults* is not checked
3. Scroll down to the *Leads* section
4. Select your preferred forecast view from the *Forecast* drop down
5. Scroll up and click *Save*



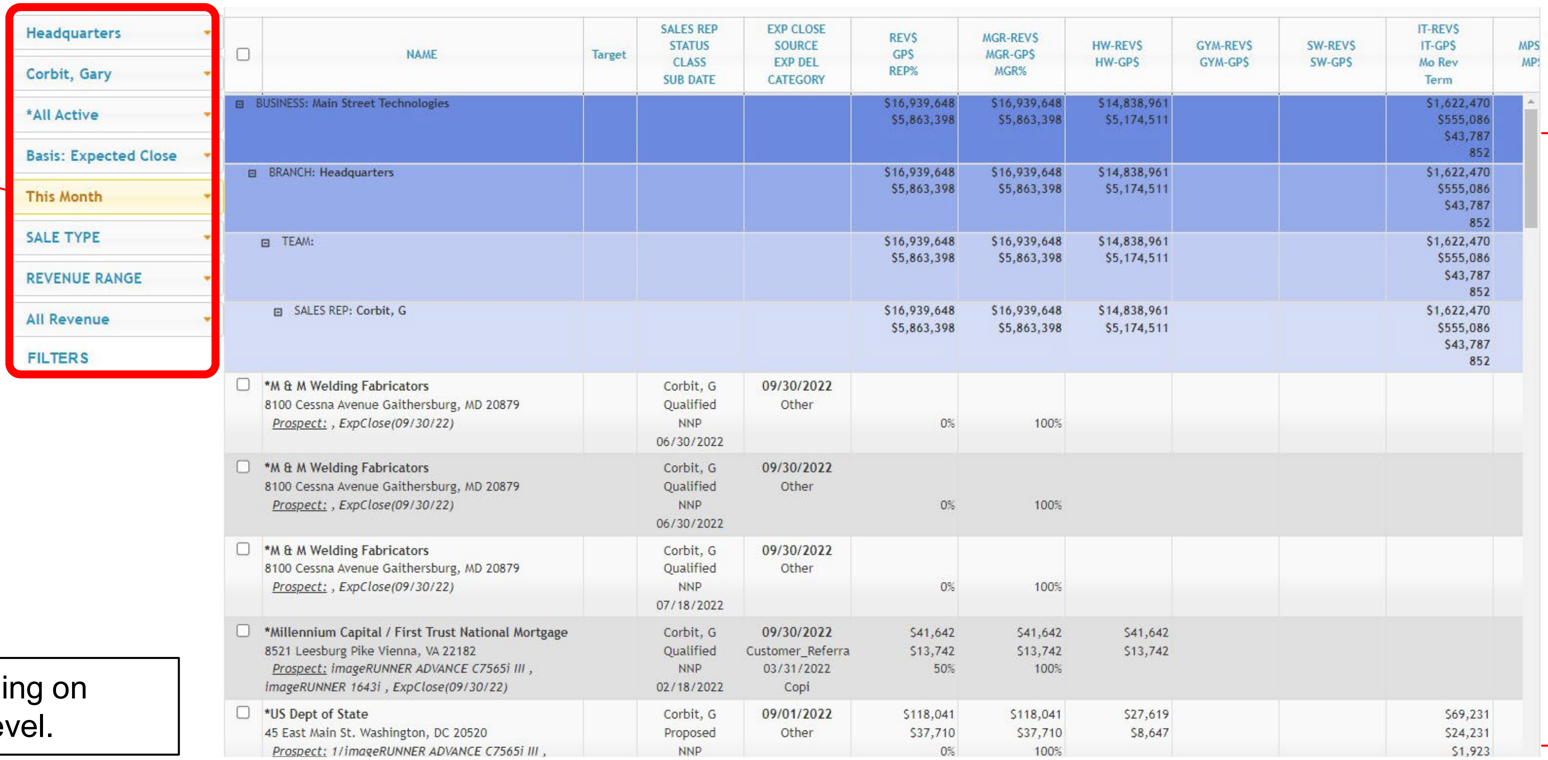
How To: Search For a Lead With the Drop-Downs

To perform basic lead searches, you can use the drop-down menus on the left-hand side of the Forecast desks.

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

For information on using the FILTERS search, see pages 185.

1



2

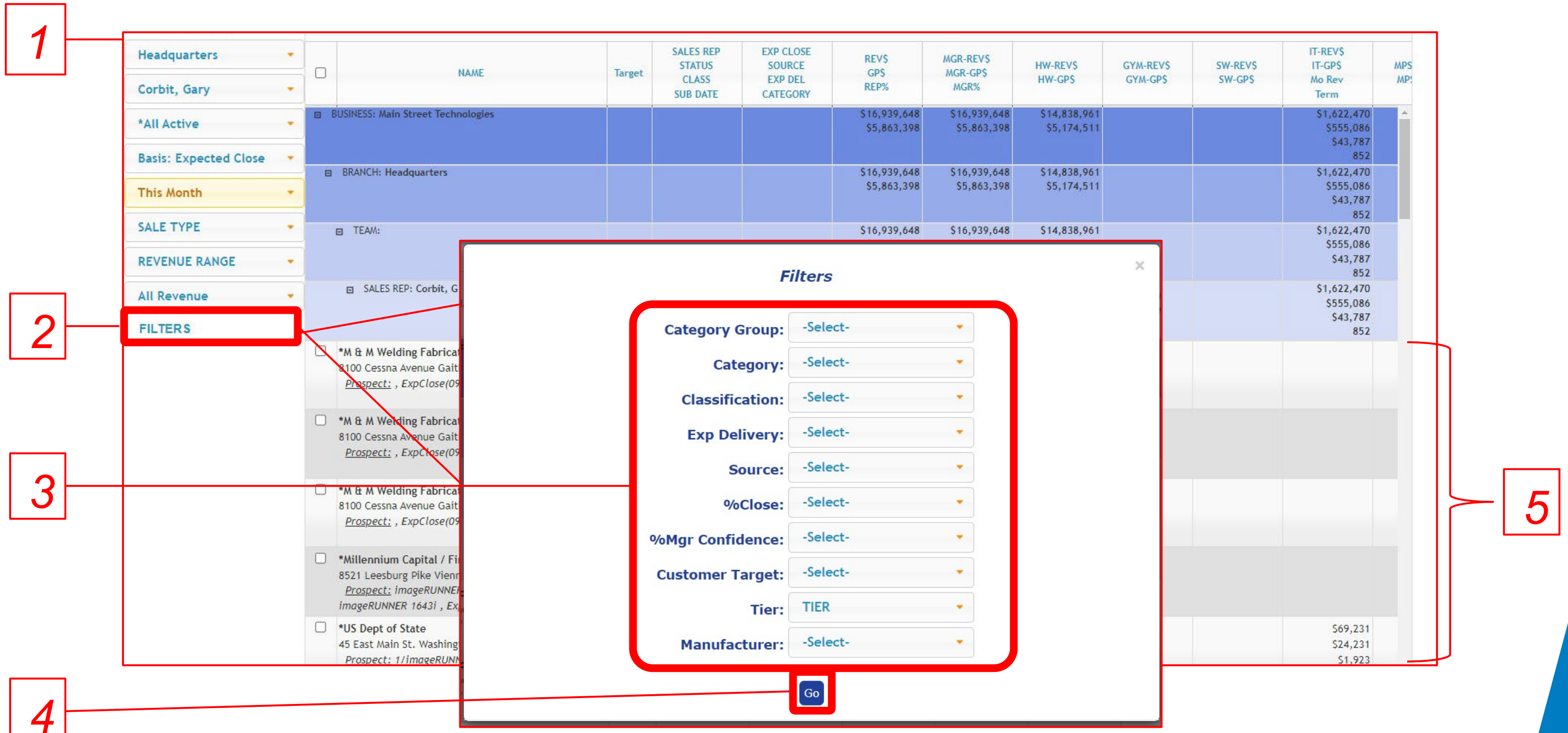
Quick Tip:

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

How To: Perform a FILTERS Search for Leads

To search for more detailed lead information than is offered in the drop-downs, you can use the Filters link.
Important: The Filters search capability available is in the Forecast, Forecast By Category, Forecast By Category Slim and Pipeline Tracking Views. Other Forecasting desks do not support searching by this method.

1. Navigate to your desired Forecasting Desk from the list above.
2. Click on the Filters Link. The filters pop-up will appear.
3. Make your desired selection from the filters available
4. Click *Go*
5. Browse the results for your desired record.



Quick Tip:

Available filters may differ depending on system configuration, permission level and which forecasting desk you are using. Forecast by Category view is shown in this example.