

mySalesChain® Platinum User Manual



Revision 3.1

Learn.SalesChain.com

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Version History & Disclaimer

	Writer	Date
Version 1.0	Robert Schuldt	2012
Version 2.0	Elijah Pineda	2017
Version 3.0	Mary Ellen Hogan & Matthew Szczygiel	January 2022
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Support

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

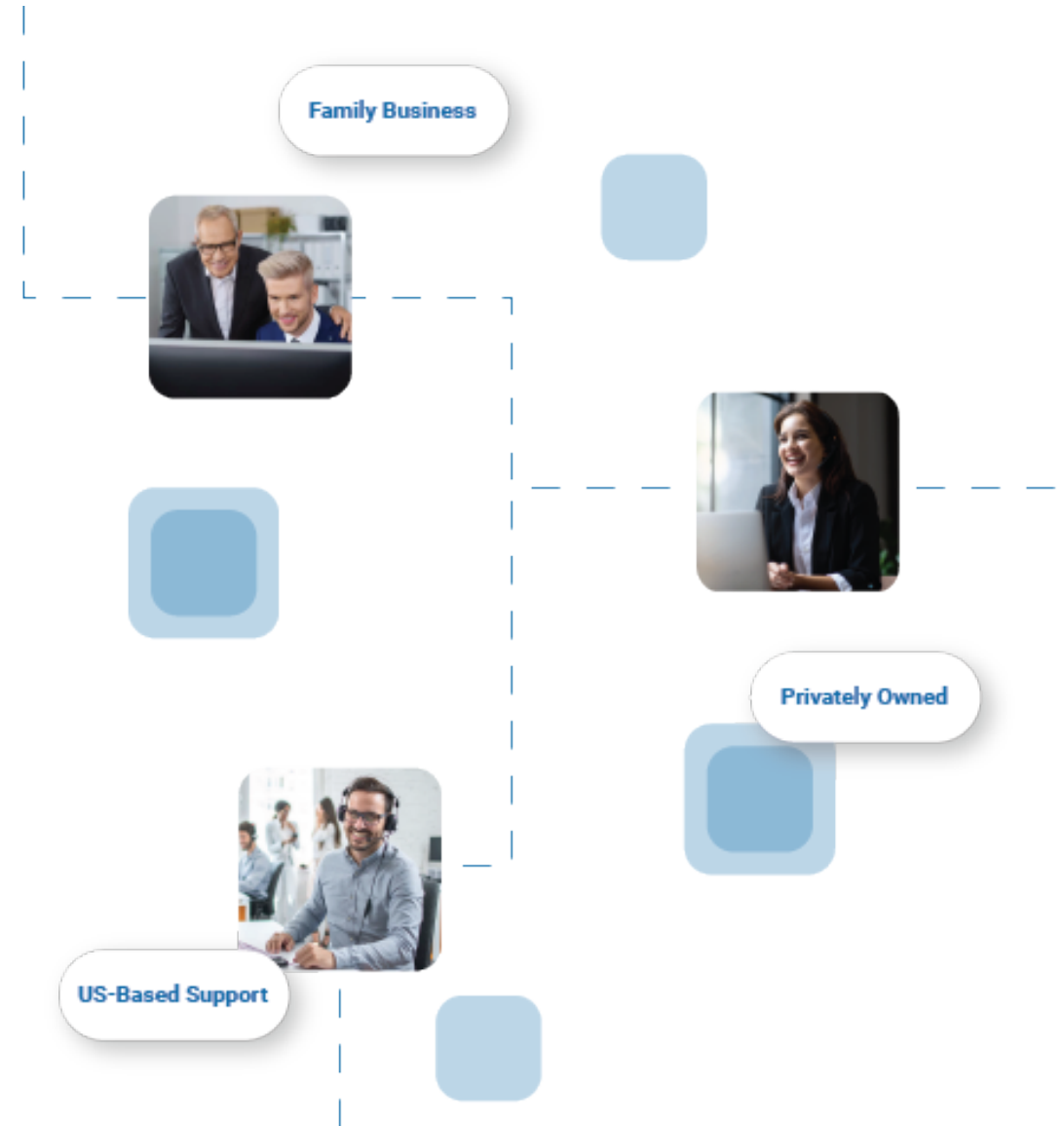
Contact our manned help desk using the information below:

Support@SalesChain.com

(203) 262-1611

www.SalesChain.com/support

Hours: 9am-5pm EST Monday-Friday

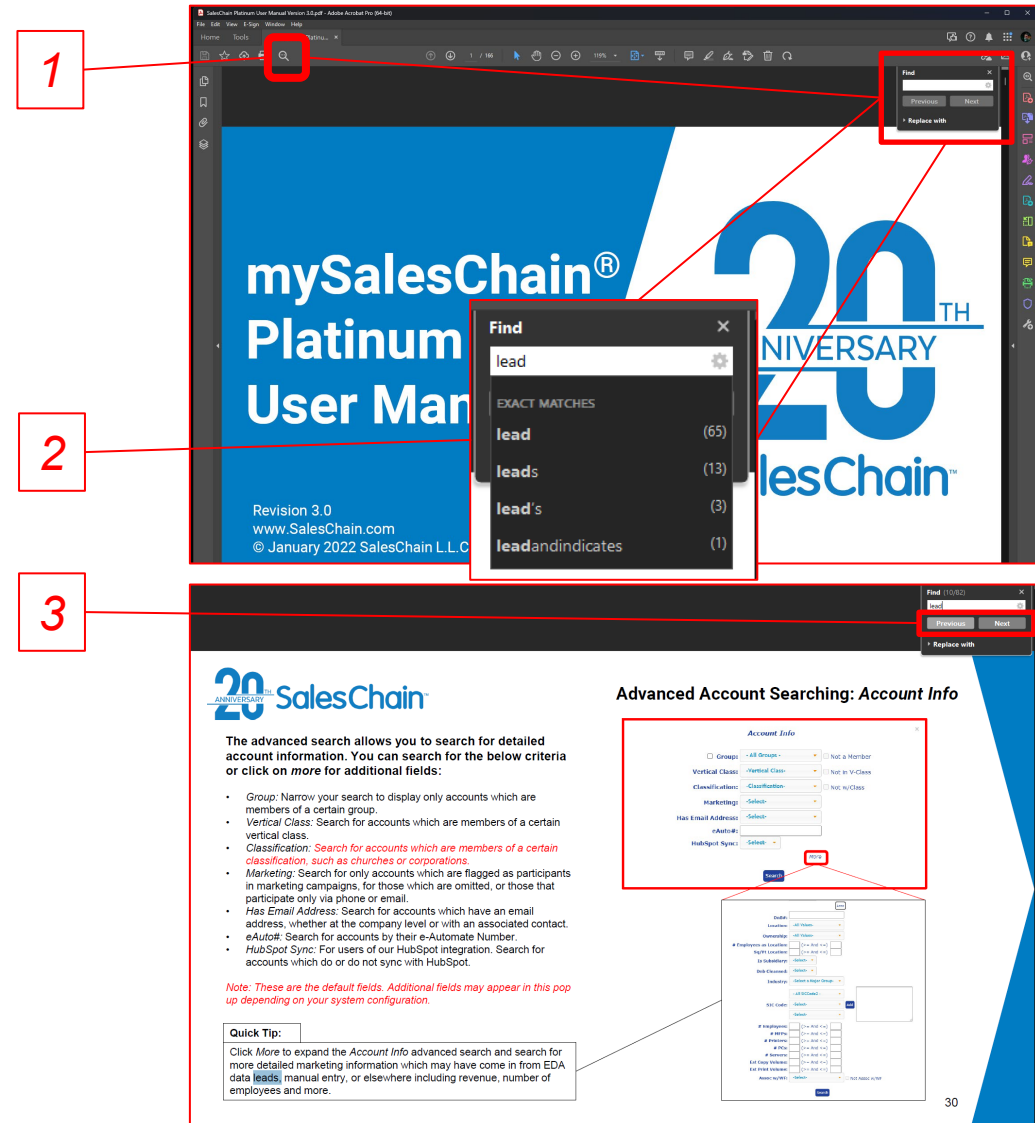


To easily find your topic of choice, you can search this PDF user manual!

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.

How To: Search this Manual (Adobe Acrobat)

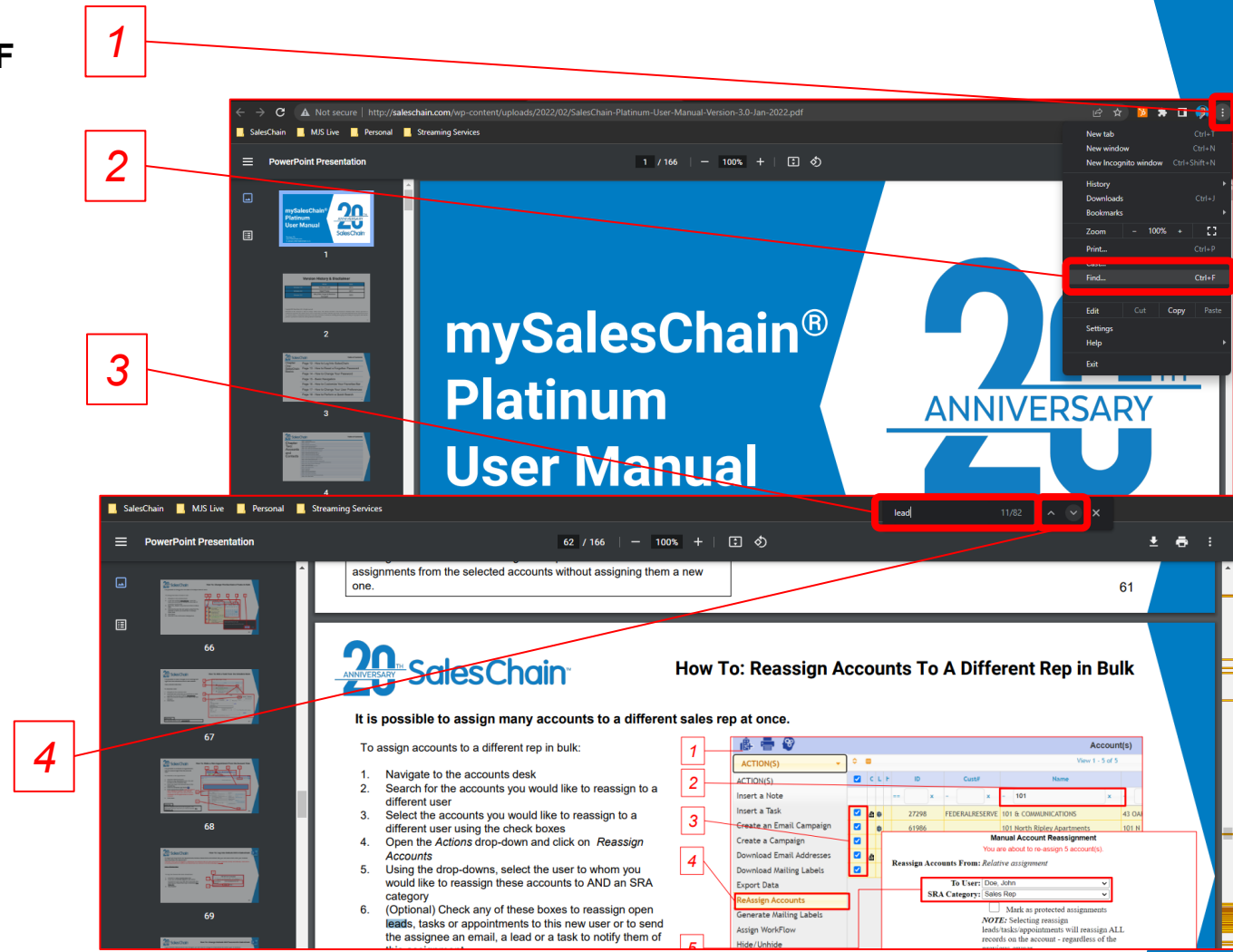


To easily find your topic of choice, you can search this PDF user manual!

To search this manual:

1. 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.

How To: Search this Manual (Google Chrome)



1

2

3

4

5

mySalesChain® Platinum User Manual

20th ANNIVERSARY

lead 11/82

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 the change

1

2

3

4

5

ACTION(S)	ID	CustID	Name	Account(s)
Insert a Note	27798	FEDERALRESERVE	101 B COMMUNICATIONS	43 DA
Insert a Task	61996	101 B COMMUNICATIONS	101 B COMMUNICATIONS	101 B

Manual Account Reassignment

You are about to re-assign 5 account(s)

Reassign Accounts From: Relative assignment

To User: Don John

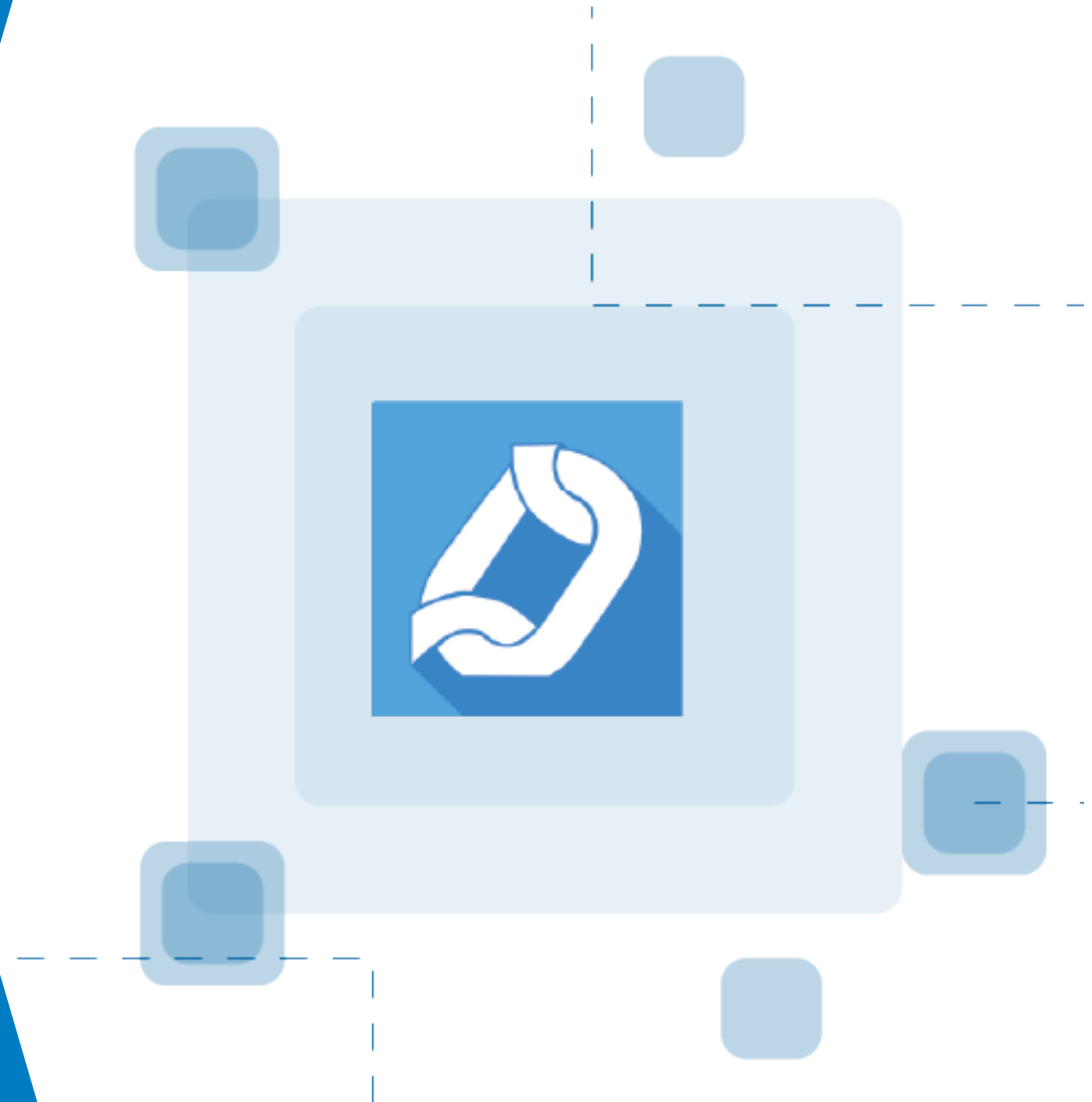
SRA Category: Sales Rep

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

1

SalesChain Basics:

Basic navigation, login instructions,
and customization of user
preferences



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

To log into SalesChain:

1. Navigate to www.mysaleschain.com 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*

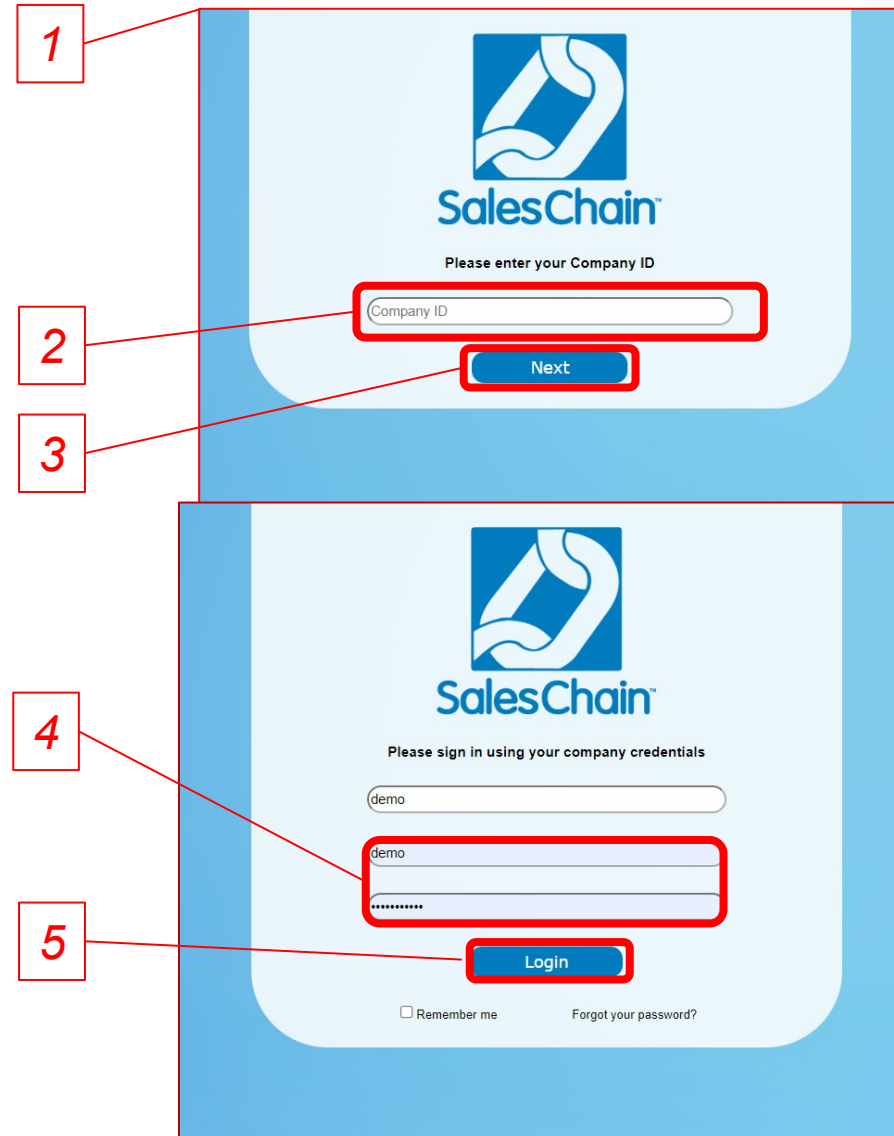
Note: If you are on a trusted computer, you may choose to click the Remember Me box.

[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

A diagram illustrating the two-step login process for SalesChain. It consists of two screenshots of the login interface, each with numbered red boxes and lines pointing to specific elements.

Step 1: The first screenshot shows the initial login screen. A red box labeled '1' points to the top of the screen. A red box labeled '2' points to the 'Company ID' input field. A red box labeled '3' points to the 'Next' button.

Step 2: The second screenshot shows the credential entry screen. A red box labeled '4' points to the 'User ID' input field. A red box labeled '5' points to the 'Login' button. Below the input fields, there is a 'Remember me' checkbox and a 'Forgot your password?' link.

How To: Log Into SalesChain With Microsoft SSO

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

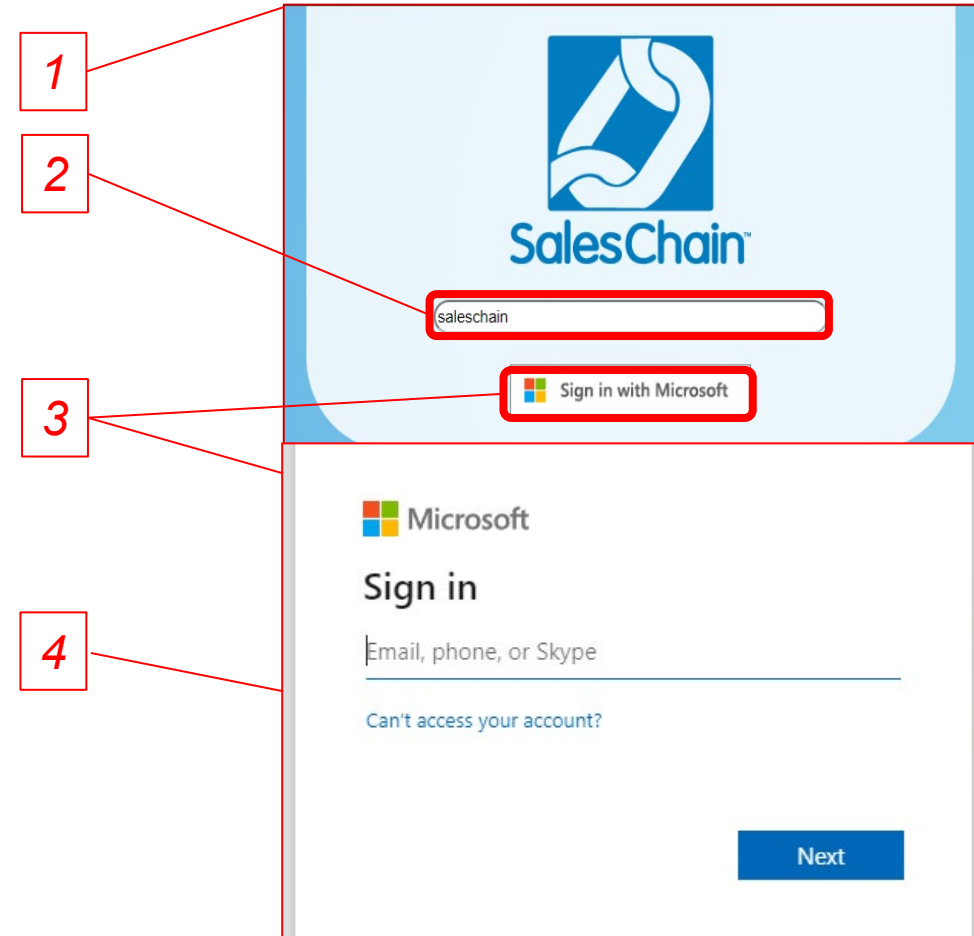
1. Navigate to www.mysaleschain.com or click the *Log In* button at www.saleschain.com
2. Enter your company ID
3. Click *Sign in with Microsoft*.

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](#)

A screenshot of the SalesChain login interface, divided into two sections. The top section has a light blue background with the SalesChain logo (a blue square with a white interlocking loop) and the text "SalesChain™". Below the logo is a text input field containing "saleschain" and a "Sign in with Microsoft" button with the Microsoft logo. The bottom section has a white background with the Microsoft logo and the text "Microsoft Sign in". Below this is a text input field with the placeholder "Email, phone, or Skype" and a link "Can't access your account?". A blue "Next" button is at the bottom right. Four red boxes with numbers 1 through 4 are on the left, with lines pointing to specific elements: 1 points to the SalesChain logo, 2 points to the "saleschain" text input field, 3 points to the "Sign in with Microsoft" button, and 4 points to the "Email, phone, or Skype" input field.

How to: Reset a Forgotten Password

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

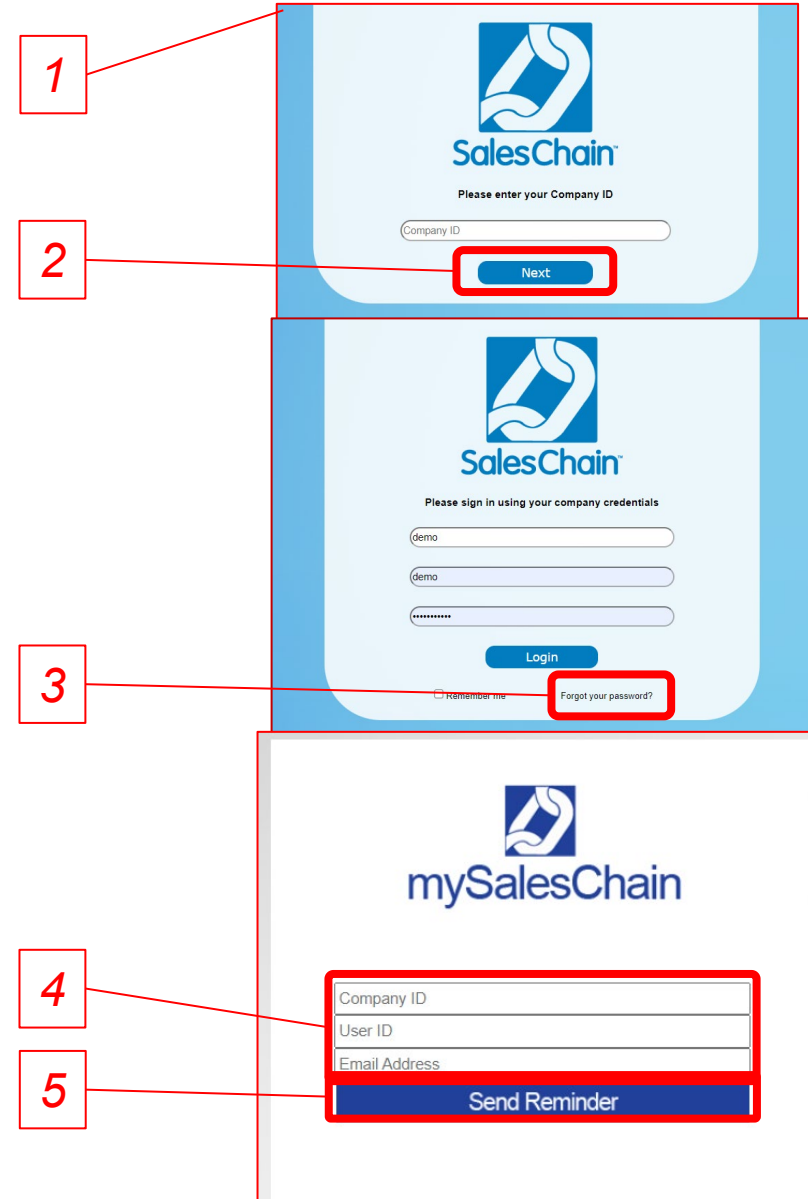
To reset a forgotten password:

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:

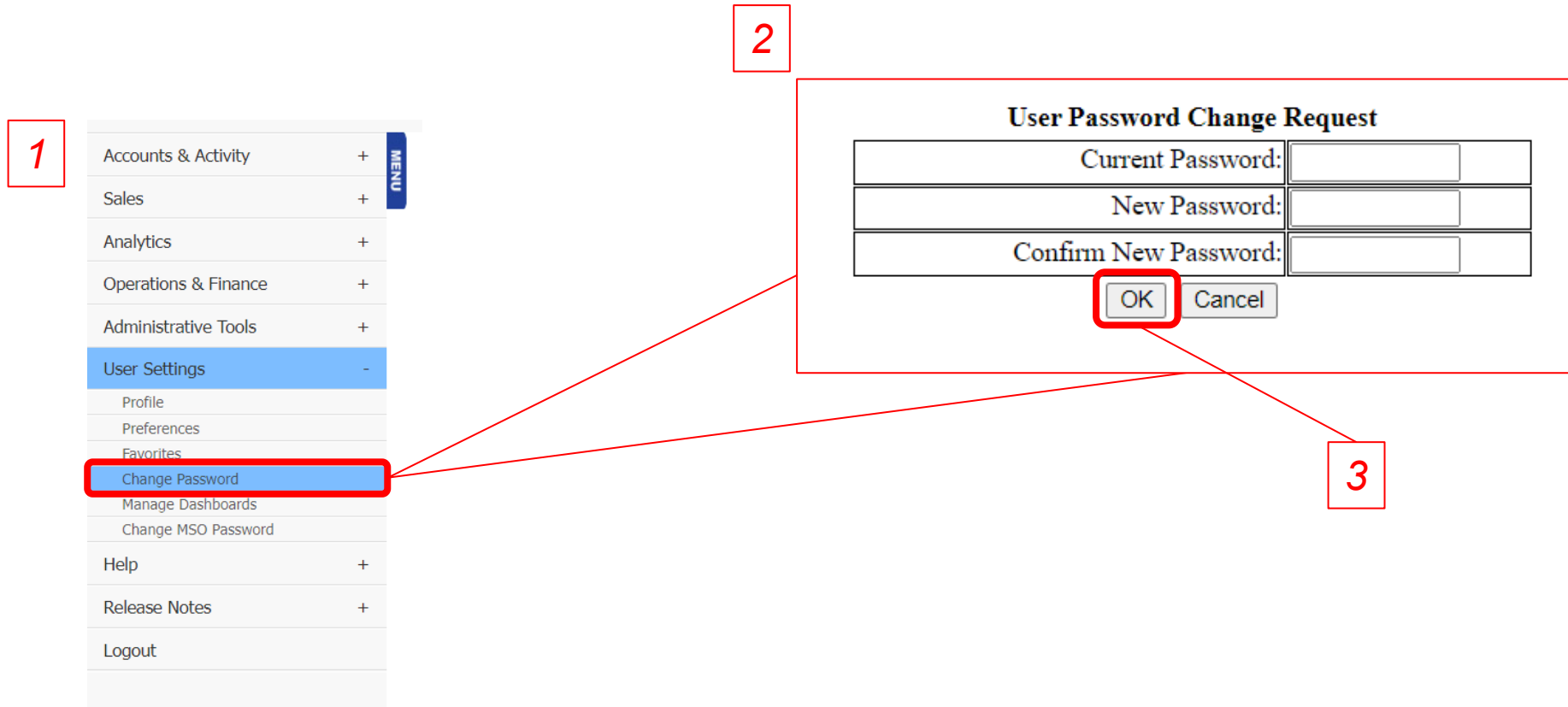
If all else fails when trying to reset your password, please contact SalesChain's help desk. You can find their information here.

The image shows three sequential screenshots of the SalesChain web interface, illustrating the steps to reset a forgotten password. Red boxes and numbers 1 through 5 are overlaid on the screenshots to highlight specific elements.

- Screenshot 1:** The top of the SalesChain login page. A red box labeled '1' points to the SalesChain logo. Another red box labeled '2' points to the 'Next' button, which is located below a 'Company ID' input field.
- Screenshot 2:** The login page with fields for Company ID, User ID, and Password. A red box labeled '3' points to the 'Forgot your password?' link, which is located below the 'Remember me' checkbox.
- Screenshot 3:** The 'Forgot your password?' page. A red box labeled '4' points to the 'Company ID' input field. Another red box labeled '5' points to the 'Send Reminder' button, which is located below the 'Email Address' input field.

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 screenshot illustrates the process of changing a password in the SalesChain system. It is divided into three numbered steps:

- Step 1:** A red box labeled '1' highlights the 'Menu Sidebar' on the left. Within this sidebar, the 'User Settings' section is expanded, and the 'Change Password' option is highlighted with a red rectangle.
- Step 2:** A red box labeled '2' highlights the 'User Password Change Request' dialog box. This dialog contains three input fields: 'Current Password:', 'New Password:', and 'Confirm New Password:'. Each field has a corresponding password strength indicator to its right.
- Step 3:** A red box labeled '3' highlights the 'OK' button at the bottom of the dialog box, which is used to confirm the password change.

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](#)

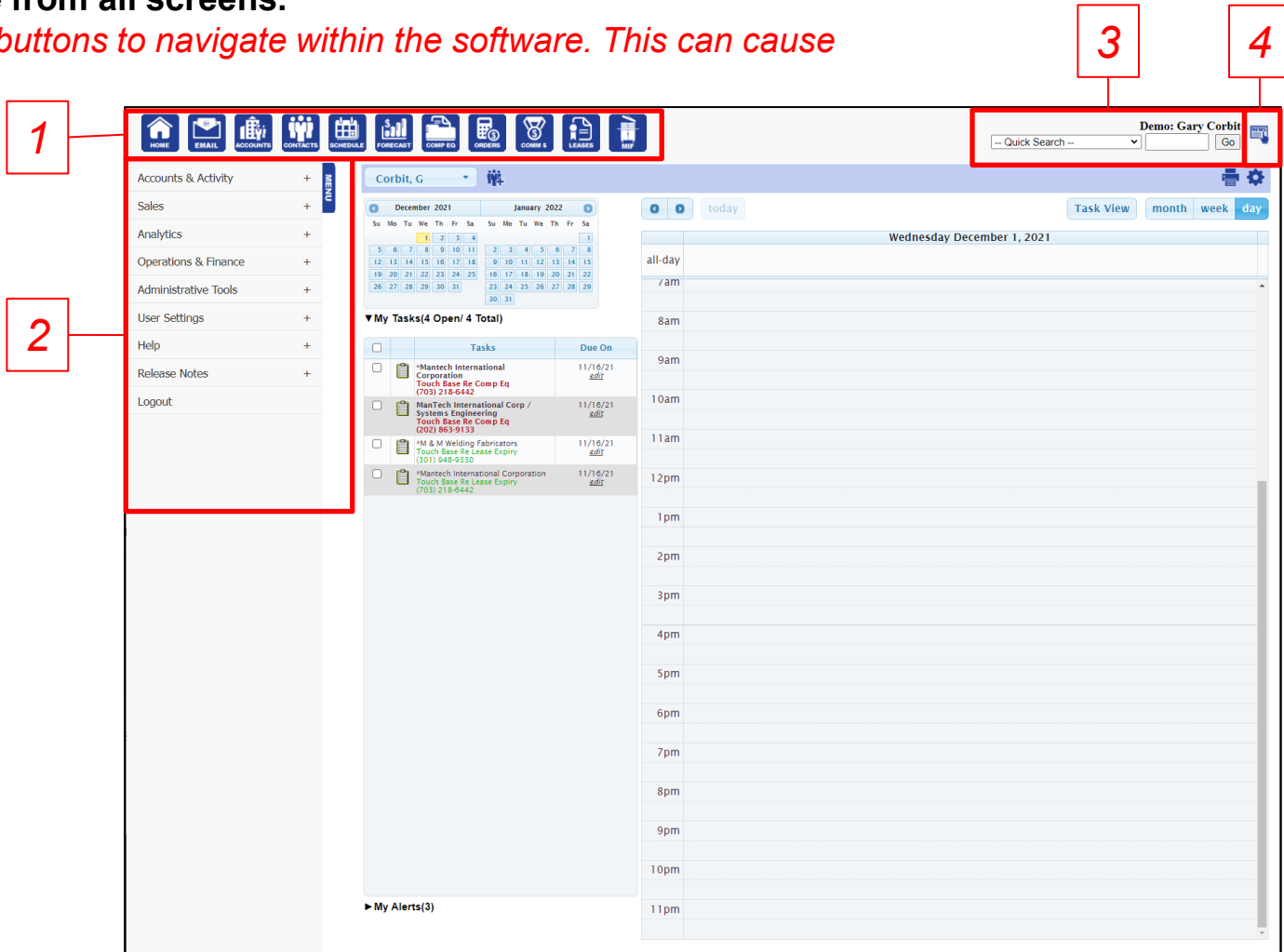
Key:

- 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.

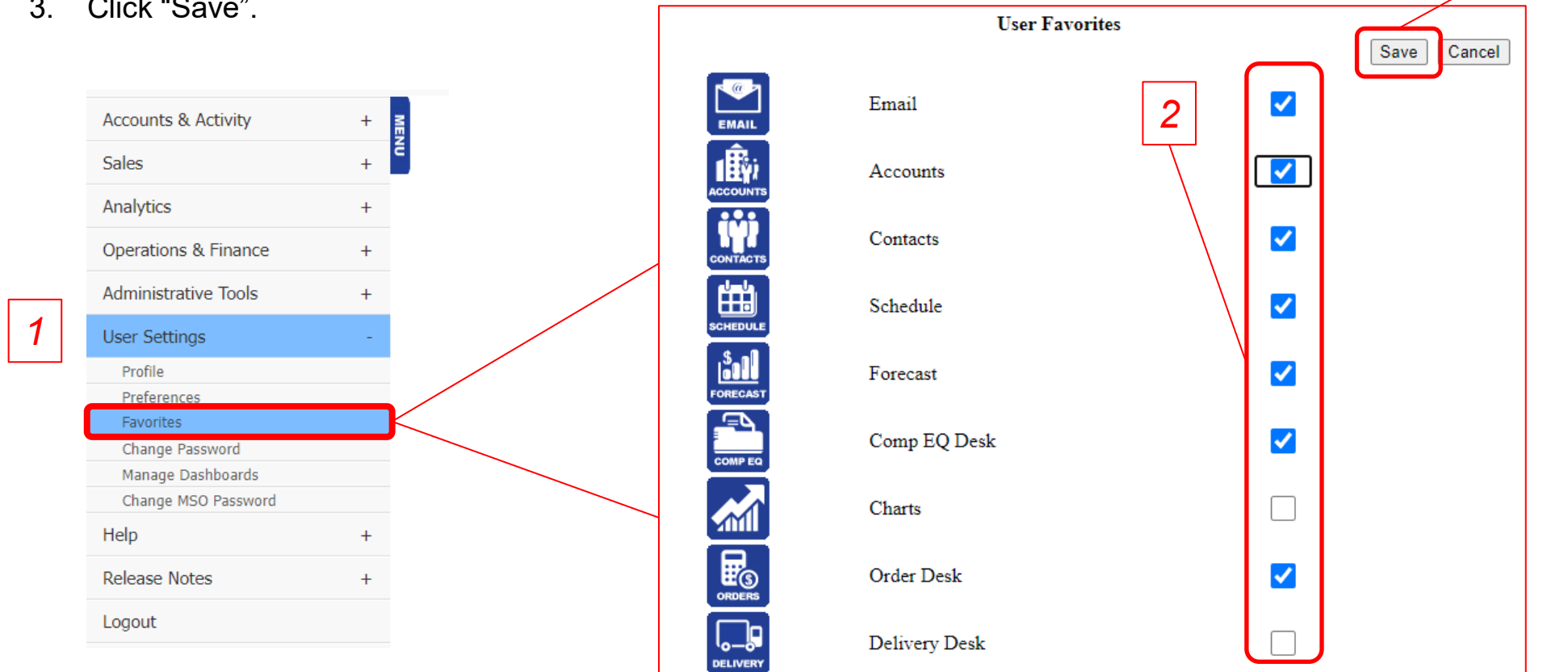
To show/hide the menu bar, click the Menu icon. A (+) indicates that the header has a sub-menu.












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".



The screenshot illustrates the steps to customize the favorites bar. A red box labeled '1' highlights the 'Favorites' option in the 'User Settings' menu. A red box labeled '2' highlights the list of items in the 'User Favorites' section, each with a checkbox. A red box labeled '3' highlights the 'Save' button.

User Favorites		
	Email	<input checked="" type="checkbox"/>
	Accounts	<input checked="" type="checkbox"/>
	Contacts	<input checked="" type="checkbox"/>
	Schedule	<input checked="" type="checkbox"/>
	Forecast	<input checked="" type="checkbox"/>
	Comp EQ Desk	<input checked="" type="checkbox"/>
	Charts	<input type="checkbox"/>
	Order Desk	<input checked="" type="checkbox"/>
	Delivery Desk	<input type="checkbox"/>

Buttons: Save, Cancel

How To: Change User Preferences

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

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

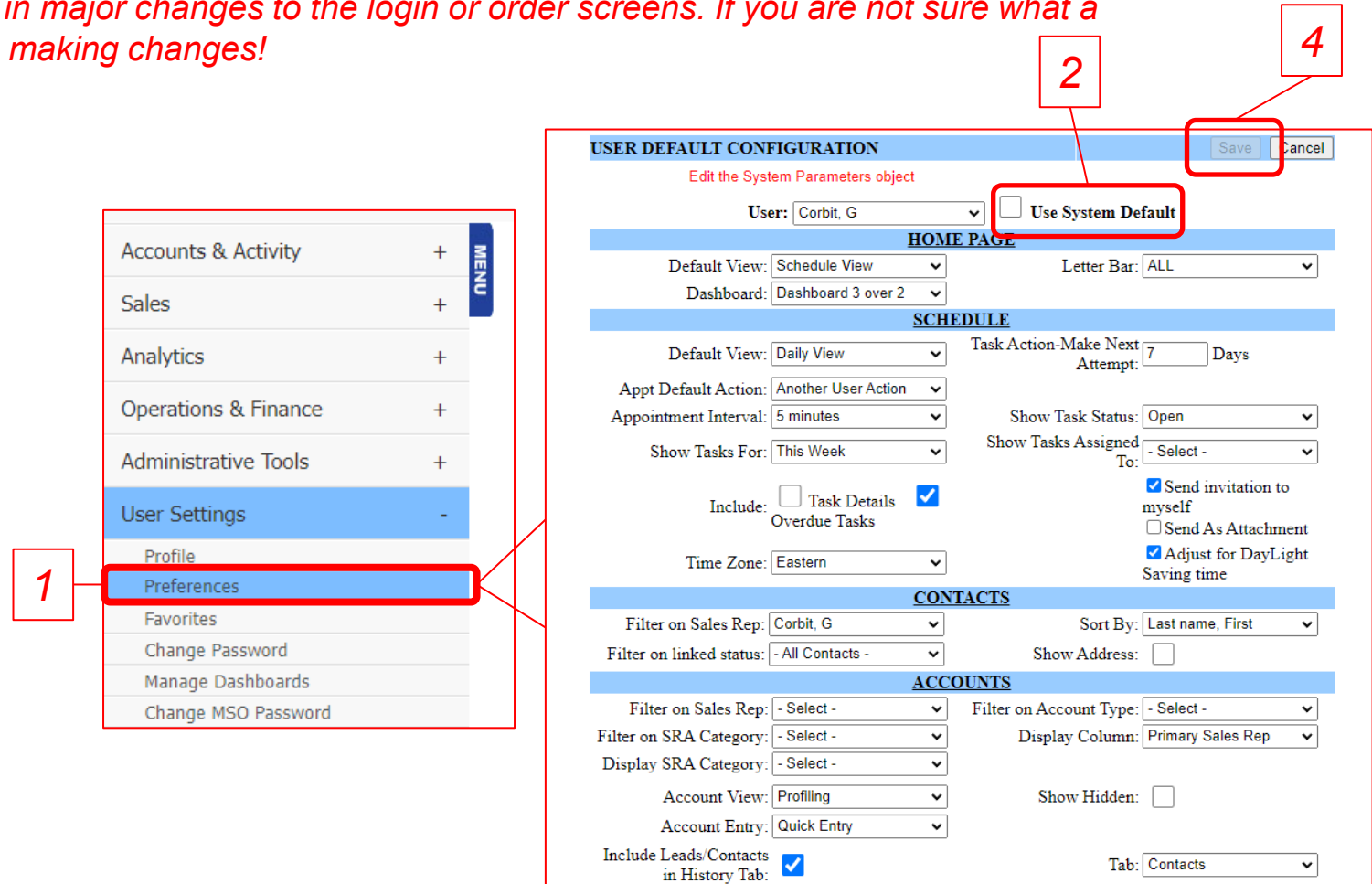
To change your user preferences:

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

[View a tutorial Video Here](#)

Quick Tip:

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



The screenshot shows the 'USER DEFAULT CONFIGURATION' page. A red box labeled '1' highlights the 'Preferences' option in the left-hand menu. A red box labeled '2' highlights the 'Use System Default' checkbox, which is currently unchecked. A red box labeled '3' highlights the 'Save' button in the top right corner. A red box labeled '4' highlights the 'Cancel' button in the top right corner. The main content area is divided into sections: HOME PAGE, SCHEDULE, CONTACTS, and ACCOUNTS, each with various configuration options like Default View, Appointment Interval, and Filter on Sales Rep.

How To: Perform a Quick Search

To perform a quick search:

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

1

2

3

Demo: Gary Corbit

8. ALL Account By Name (Substring) church

Go

1. Account By Name (Substring)

2. Account By SalesChain ID#

3. Account By eAutomate#

4. Account By Phone

5. OBD by OBD#

6. Contact by First Name

7. Contact by Last Name

8. ALL Account By Name (Substring)

9. ALL Account By Phone

10. ALL Account By Dnb#

11. ALL Account By Address

Asset By Asset Tag

Asset By Serial Nbr

Asset By Model

Asset By Install Date

Lease by Lease Nbr

Lead By SalesChain ID#

Comp EQ By Serial Number

Comp-Eq By SalesChain ID#

4

ALL Account By Name (Substring) {like church}

View 1 - 50 of 1,464

Page 1 of 30

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




2

Accounts and Contacts:

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

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

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

Key:

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



The screenshot shows the Accounts Desk interface. The top bar includes a 'MENU' button, a 'Print' icon, a 'Report' icon, and a 'Settings' gear icon. Below the top bar is a search toolbar with a search bar and a 'Search' button. The main area displays a table of accounts with columns for ID, Cust#, Name, Address, City, State, Zip, and Phone. The table is filtered to show 200 of 65,287 records. The table is sorted by ID in ascending order. The first few rows of the table are highlighted in red. The table is also filtered by 'All Categories', 'All Next Call Dates', 'All Sales Reps', 'All Account Types', and 'Advanced Search'.

ID	Cust#	Name	Address	City	State	Zip	Phone
28871	*Loaner	*Loaner Equipment	4601 Eisenhower street	Alexandria	WY	22304	(703) 461-8195
28938	M&M	*M & M Welding Fabricators	8100 Cessna Avenue	Gaithersburg	MD	20879	(301) 948-9330
28988	Mantech/HQ/AP	*Mantech International Corporation	12015 Lee Jackson Highway	Fairfax	VA	22033	(703) 218-6442
29759	Millennium/Vienna	*Millennium Capital / First Trust National Mortgage	8521 Leesburg Pike	Vienna	VA	22182	(203) 910-7165
29798	MITRE/AP	*Mitre Corporation	7515 Colshire Drive	Mc Lean	VA	22102	(703) 983-7493
30385	NVCH	*NOVA-Northern Virginia Community Hospital	601 Carlin Springs Road	Arlington	VA	22204	(703) 578-2241
42368	R&B thrift	*R & B Impressions, Inc.	678 South Pickett Street	Alexandria	VA	22304	(703) 823-9054
31370	SI INTL	*SI International	800 S Frederick Avenue; Suite 204	Gaithersburg	MD	20877	
31704	State/AP	*US Dept of State	45 East Main St.	Washington	DC	20520	(202) 736-7470
32587	VERIZON	*Verizon	1880 Campus Drive; 2nd Floor	Reston	VA	20191	(703) 874-9543
32464	USPS/DIVERSITY	,# 3821	475 L'Enfant Plaza SW #3821	Washington	DC	20260	(202) 268-4109
79900		1 To 1 Discovery	7345 Stream Street	Springfield	VA	22152	(274) 274-5898
27298	FEDERALRESERVE	101 & COMMUNICATIONS	43 OAK RIDGE AVENUE	SUMMIT	NJ	07901	(203) 262-1611
61986		101 North Ripley Apartments	101 N Ripley St Ste 104	Alexandria	VA	22304	(311) 345-8986
59256		108 North State Street Chicago	108 N State St	Chicago	IL	60602	
38078		11th Communications Squadron	110 Luke Avenue	Bolling AFB	DC	20032	(202) 767-8031
76024		1200 Acqua Apartments	1200 Harrison Creek Blvd	Petersburg	VA	23803	(221) 024-5898
95952		123 Junk Llc	458 West Street	Chantilly	VA	20151	(504) 074-5898
94598		1301 Associate's	1001 G St Nw Ste 700w	Washington	DC	20001	(486) 384-5898
96209		141 East-premier All-inclusive	214 N Dunlop St	Petersburg	VA	23803	(507) 494-5898
94696		1607 Capital Partners	13 S 13th St Ste 400	Richmond	VA	23219	(487) 664-5898
73869		1701 Pa Av Management Ofc	1701 Pennsylvania Ave Nw Ste 130	Washington	DC	20006	(193) 604-5898

Columns In the Accounts Desk

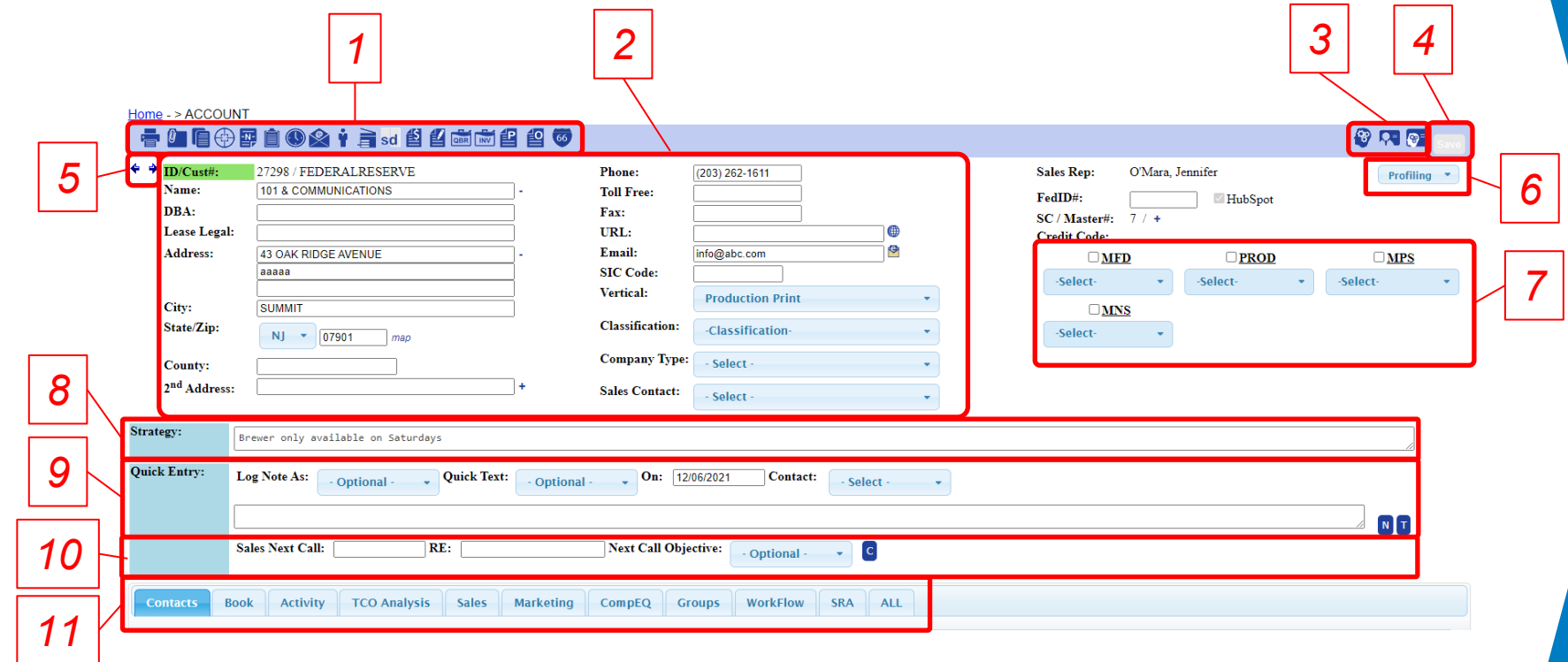
Column	Description
C	C stands for <i>Customer</i> and indicates the account is a customer.
L	L stands for <i>Lead</i> and indicates the account has an active lead.
H	H stands for <i>HubSpot</i> and indicates the account is syncing with HubSpot.
ID	Displays the account's SalesChain ID number which is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

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



The screenshot shows the 'ACCOUNT' view for a specific account. The interface includes a top navigation bar with icons (1), a main content area with account details (2), a right sidebar with profile targeting options (3, 4, 6, 7), and a bottom section with strategy and quick entry utilities (8, 9, 10). At the bottom, there are tabs for different views (11).

Account Details:

- ID/Cust#: 27298 / FEDERALRESERVE
- Name: 101 & COMMUNICATIONS
- DBA:
- Lease Legal:
- Address: 43 OAK RIDGE AVENUE, aaaaa
- City: SUMMIT
- State/Zip: NJ 07901
- County:
- 2nd Address:
- Phone: (203) 262-1611
- Toll Free:
- Fax:
- URL:
- Email: info@abc.com
- SIC Code:
- Vertical: Production Print
- Classification: -Classification-
- Company Type: -Select-
- Sales Contact: -Select-

Right Sidebar:

- Sales Rep: O'Mara, Jennifer
- FedID#:
- SC / Master#: 7 / +
- Credit Code:
 - ☐ MFD
 - ☐ PROD
 - ☐ MPS
 - ☐ MNS

Bottom Section:





















- Strategy: Brewer only available on Saturdays
- Quick Entry: Log Note As: - Optional -, Quick Text: - Optional -, On: 12/06/2021, Contact: - Select -
- Sales Next Call: RE: Next Call Objective: - Optional -

Tabs: Contacts, Book, Activity, TCO Analysis, Sales, Marketing, CompEQ, Groups, Workflow, SRA, ALL

Quick Tip:

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

Action Icons in the Account View

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

Information Tabs in the Account View

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

Contacts

Book

Activity

TCO Analysis

Sales

Marketing

CompEQ

Groups

WorkFlow

SRA

ALL

Priority Contacts

Decision Maker

IT Contact

Finance

MPS

Legal

- Select -

- Select -

- Select -

- Select -

- Select -

Contacts


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

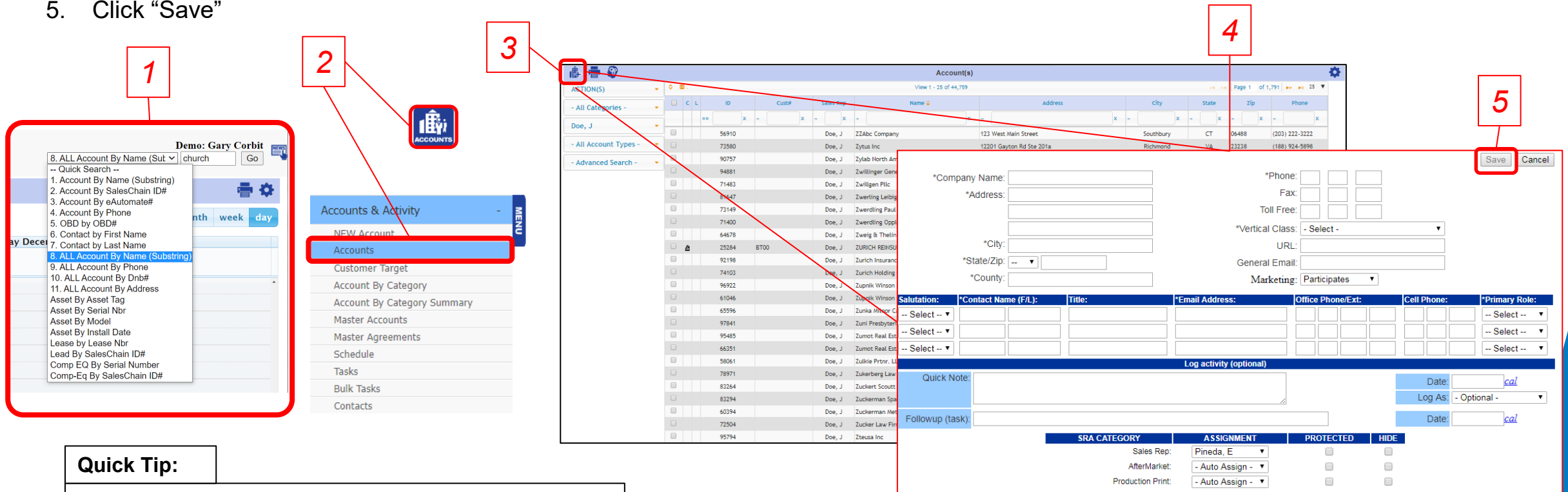
Pending Activity

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

How To: Create a New Account

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

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



1 Quick Search: 8. ALL Account By Name (Subst... church Go

2 Accounts & Activity

3 NEW Account

4 *Company Name: *Address: *City: *State/Zip: *County: *Phone: Fax: Toll Free: *Vertical Class: - Select - URL: General Email: Marketing: Participates

5 Save Cancel

Quick Tip:

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

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

[View a tutorial Video Here](#)

22

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](#).

1

ACTION(S)

- All Categories -

Doe, J

- All Account Types -

- Advanced Search -

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

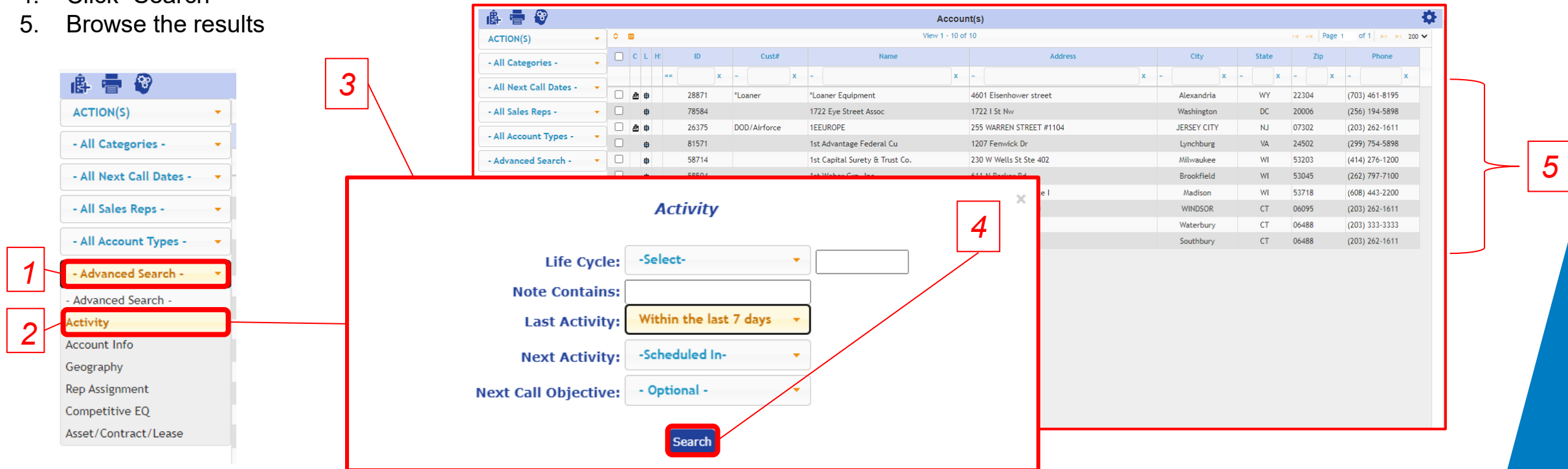
Quick Tip:
 The drop downs shown may differ depending on system configuration or user permission level.

2

How To: Perform an Advanced Search for Accounts

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

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



The screenshot illustrates the steps to perform an advanced search for accounts. The interface consists of a sidebar on the left, a main table of account data, and a pop-up search window titled "Activity".

Step 1: The sidebar on the left contains a list of search categories. The "Advanced Search" option is highlighted with a red box and labeled with a red "1".

Step 2: The "Advanced Search" dropdown menu is open, showing various search criteria. The "Activity" option is highlighted with a red box and labeled with a red "2".

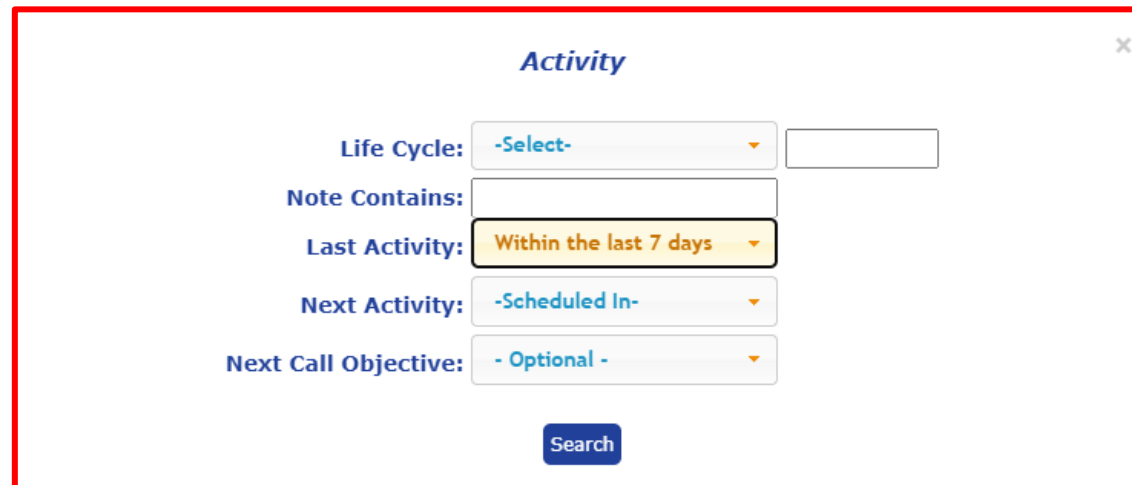
Step 3: The "Activity" pop-up window is displayed. It contains several search criteria: "Life Cycle" (set to "-Select-"), "Note Contains" (empty), "Last Activity" (set to "Within the last 7 days"), "Next Activity" (set to "-Scheduled In-"), and "Next Call Objective" (set to "- Optional -"). The "Search" button is highlighted with a red box and labeled with a red "4".

Step 4: The main table of account data is shown. It contains columns for ID, Cust#, Name, Address, City, State, Zip, and Phone. The table displays several accounts, including "Loaner", "1722 Eye Street Assoc", "DOD/Airforce", "1st Advantage Federal Cu", "1st Capital Surety & Trust Co.", "Brookfield", "Madison", "WINDSOR", "Waterbury", and "Southbury". The table is labeled with a red "5".

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



The screenshot shows a search interface titled "Activity" with a close button (X) in the top right corner. It contains five search criteria, each with a label and a dropdown menu:

- Life Cycle:** -Select-
- Note Contains:** (empty text input field)
- Last Activity:** Within the last 7 days
- Next Activity:** -Scheduled In-
- Next Call Objective:** - Optional -

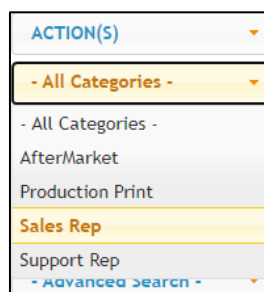
A blue "Search" button is located at the bottom center of the form.

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.



The screenshot shows a dropdown menu titled "ACTION(S)" with a list of categories. The "Sales Rep" category is highlighted in yellow. The list includes:

- All Categories -
- All Categories -
- AfterMarket
- Production Print
- Sales Rep**
- Support Rep
- Advanced Search -

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

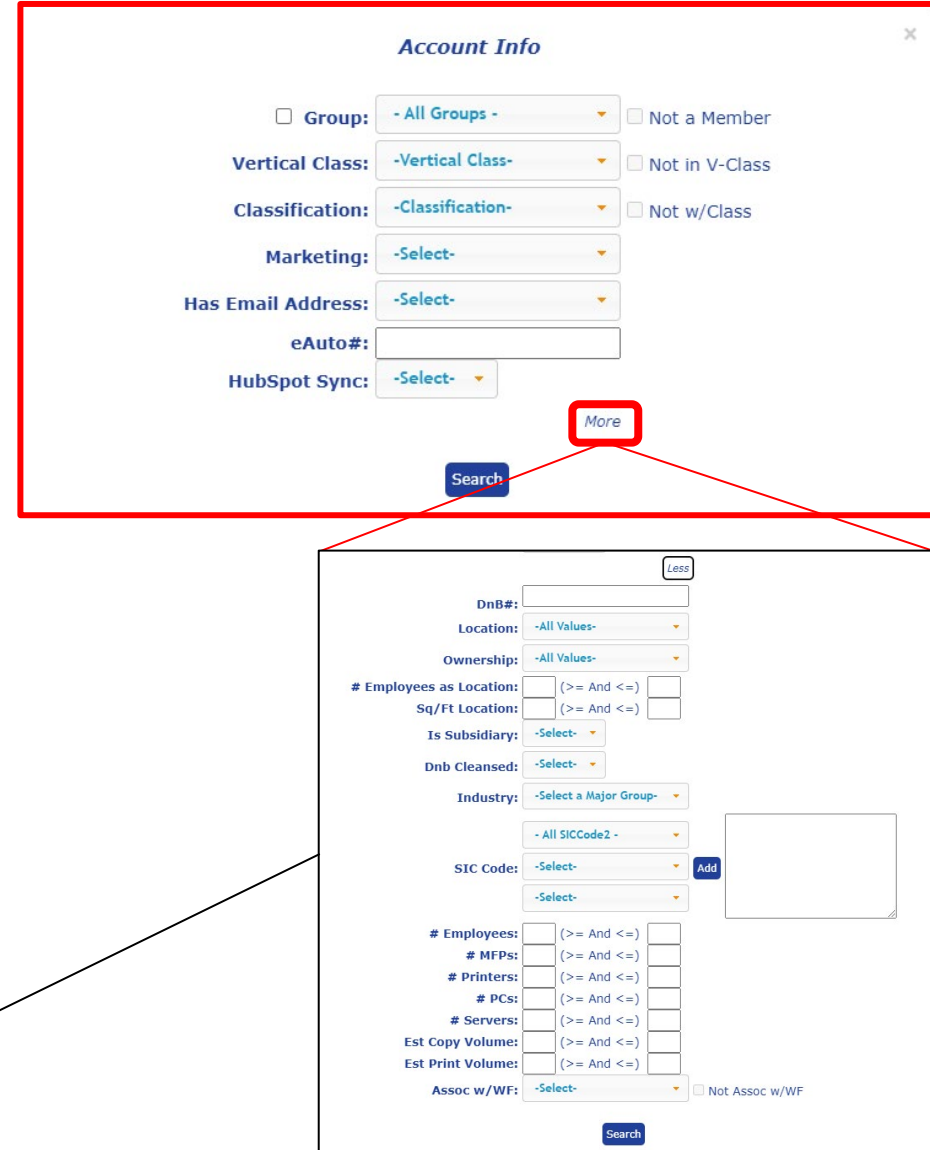
- *Group*: Narrow your search to display only accounts which are members of a certain group.
- *Vertical Class*: Search for accounts which are members of a certain vertical class.
- *Classification*: *Search for accounts which are members of a certain classification, such as churches or corporations.*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

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

Quick Tip:

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

Advanced Account Searching: Account Info



Account Info

☐ Group: - All Groups - ☐ Not a Member

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

Classification: -Classification- ☐ Not w/Class

Marketing: -Select-

Has Email Address: -Select-

eAuto#:

HubSpot Sync: -Select-

More

Search

Expanded Fields:

DnB#:

Location: -All Values-

Ownership: -All Values-

Employees as Location: (>= And <=)

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

Is Subsidiary: -Select-

Dnb Cleansed: -Select-

Industry: -Select a Major Group-

SIC Code: -All SICCode2- **Add**

Employees: (>= And <=)

MFPs: (>= And <=)

Printers: (>= And <=)

PCs: (>= And <=)

Servers: (>= And <=)

Est Copy Volume: (>= And <=)

Est Print Volume: (>= And <=)

Assoc w/WF: -Select- ☐ Not Assoc w/WF

Search

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 choose 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.

A screenshot of a "Geography" search pop-up window. The window has a title bar with the word "Geography" in blue and a close button (X) in the top right corner. Inside the window, there are five labeled input fields: "Street:" (a text box), "City:" (a text box), "State Code:" (a text box), "Zip Code:" (a text box containing the text "22304, 22033"), and "County:" (a dropdown menu showing "-County-"). Below these fields is a blue "Search" button.

Advanced Account Searching: Rep Assignment


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

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

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

Quick Tip:

The rep assignment advanced searches are intended to modify basic searches for Sales Rep and Sales Rep Category, which are performed using the basic search drop-downs. See [page 23](#) for more information and the images to the right for reference.



Rep Assignment [X]

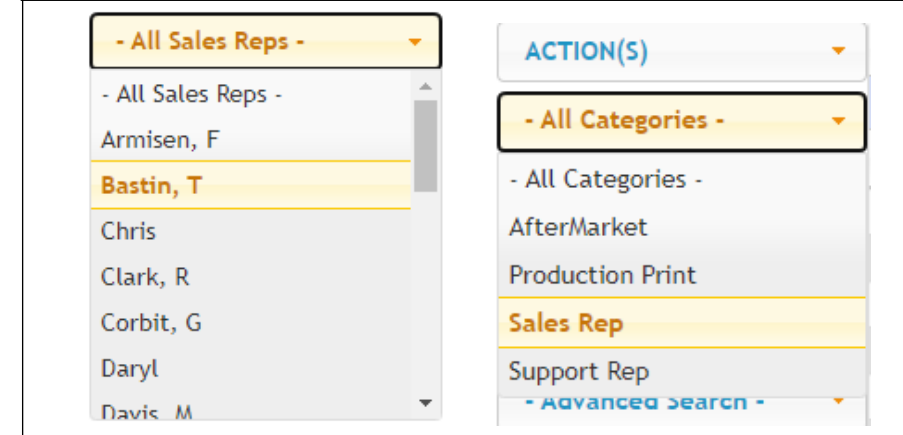
☐ Not Associated w/Selected Rep

☐ Show hidden

Protected: -Select-

Search

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



- All Sales Reps -	ACTION(S)
- All Sales Reps -	- All Categories -
Armisen, F	- All Categories -
Bastin, T	AfterMarket
Chris	Production Print
Clark, R	Sales Rep
Corbit, G	Support Rep
Daryl	- Advanced Search -
Davis, M	

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 choose 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.

A screenshot of a web-based search form titled "Competitive EQ" with a close button (X) in the top right corner. The form contains three input fields: "Comp Manufacturer:" with a dropdown menu showing "-Manufacturer-", "Comp Model:" with a text input field, and "Comp Lease:" with a dropdown menu showing "-Select-". To the right of the "Comp Manufacturer:" field is a checkbox labeled "Not w/Manufacturer". Below the input fields is a blue "Search" button.

Competitive EQ

Comp Manufacturer: -Manufacturer- ☐ Not w/Manufacturer

Comp Model:

Comp Lease: -Select-

Search

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

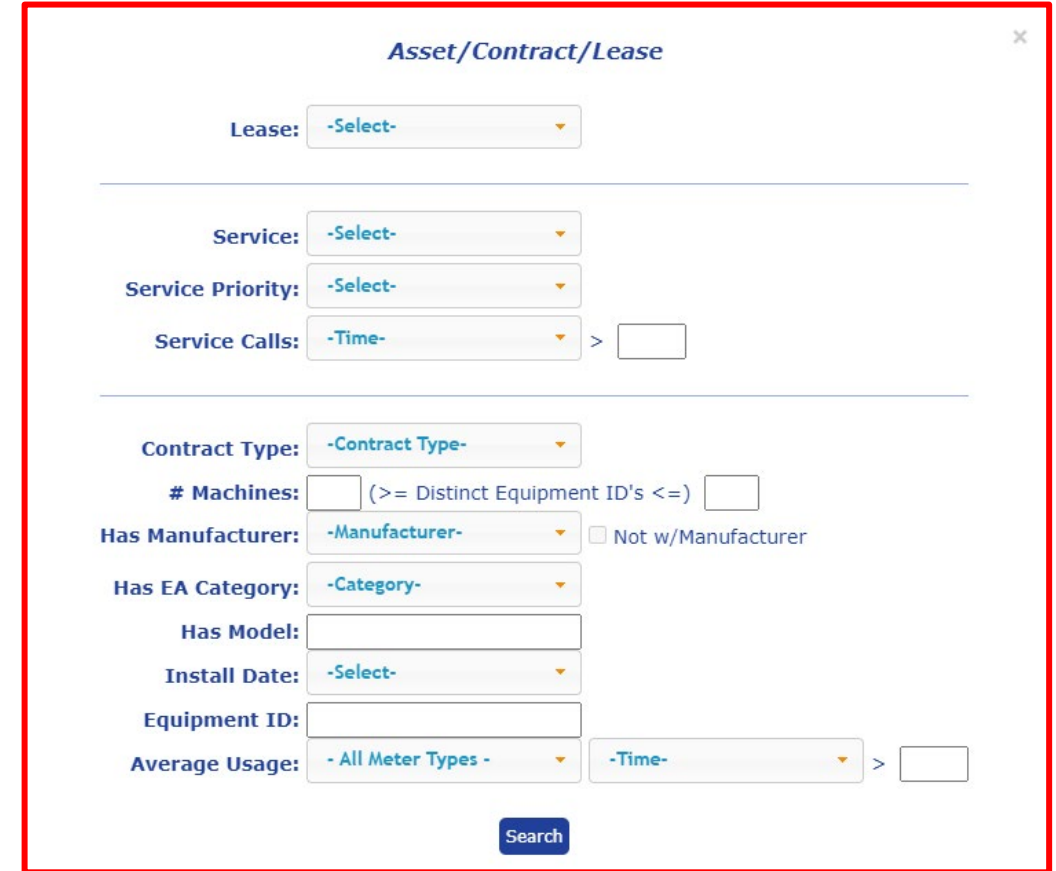
Quick Tip:

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



The screenshot shows a search interface titled "Asset/Contract/Lease" with a close button (X) in the top right corner. The interface is divided into two main sections by a horizontal line. The top section contains search criteria for Leases and Services, while the bottom section contains criteria for Contracts and Equipment. Each criterion is represented by a label followed by a dropdown menu or input field. Some fields have additional operators like ">" and input boxes for numeric values. A "Search" button is located at the bottom right of the form.

Lease: -Select-

Service: -Select-

Service Priority: -Select-

Service Calls: -Time- > []

Contract Type: -Contract Type-

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

Has Manufacturer: -Manufacturer- ☐ Not w/Manufacturer

Has EA Category: -Category-

Has Model: []

Install Date: -Select-

Equipment ID: []

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

Search

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

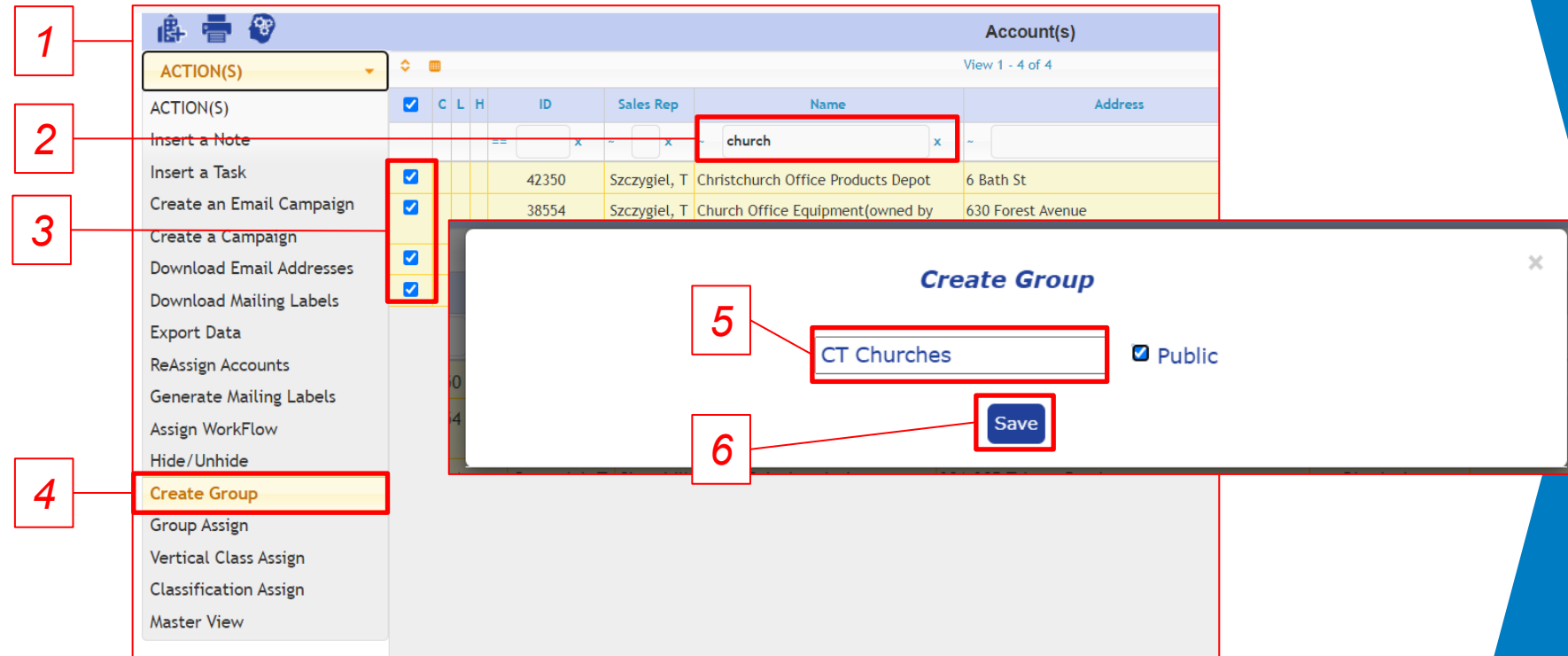
How To: Create a Group of Accounts

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

[View a tutorial Video Here](#)

To create a group of accounts:

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



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

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

Quick Tip:

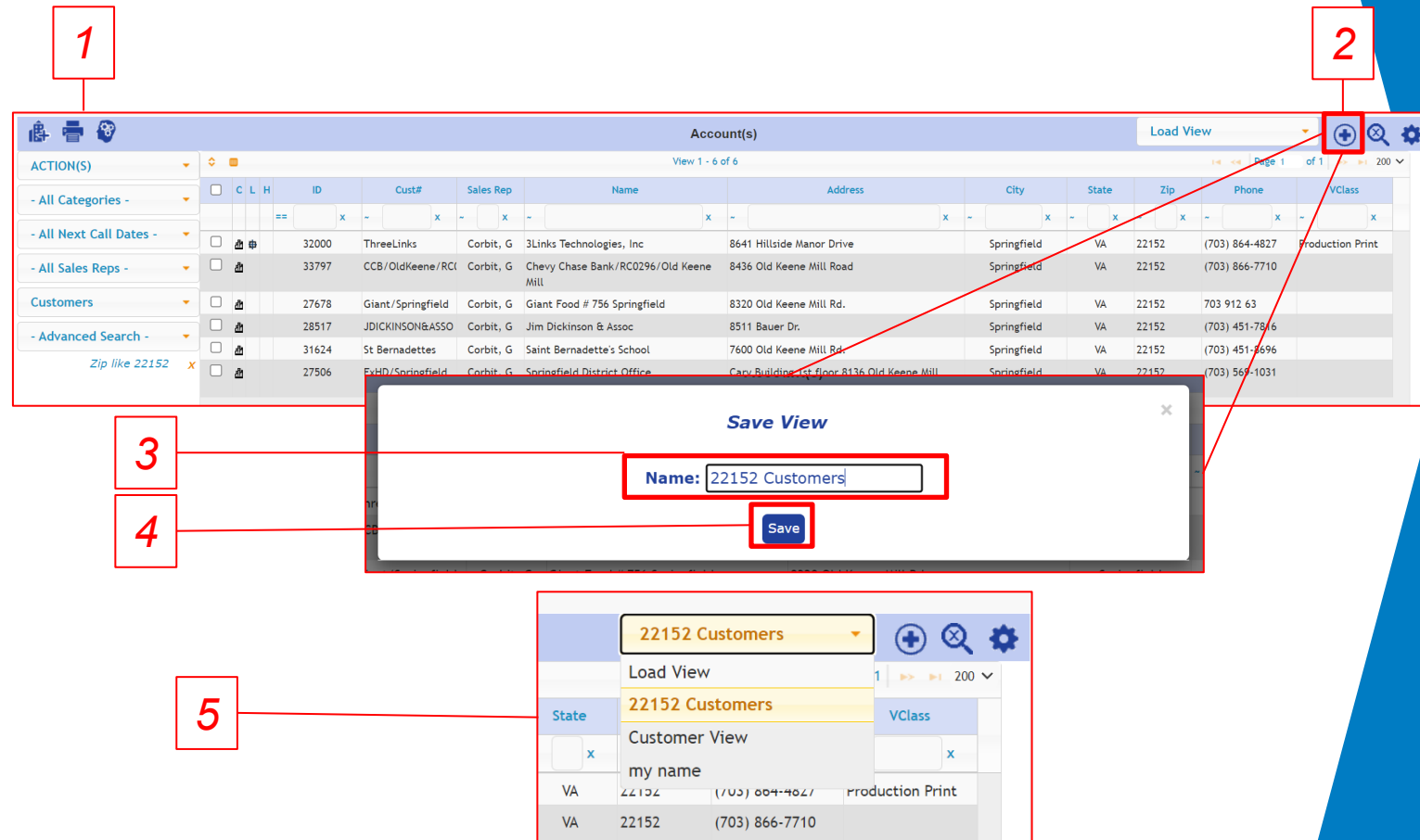
Check the box next to *Public* in order to make your group visible to other users of SalesChain at your company. Other users may see the group, but not accounts within it that they would not otherwise have access to.

How To: 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.



The screenshot shows the SalesChain interface with a table of customer data. The table has columns: C, L, H, ID, Cust#, Sales Rep, Name, Address, City, State, Zip, Phone, and VClass. The data is filtered by zip code 22152. The toolbar at the top right has a plus icon (+) which is highlighted with a red box and number 2. A red box and number 1 points to the table. A red box and number 3 points to the 'Name' field in the 'Save View' dialog, which contains the text '22152 Customers'. A red box and number 4 points to the 'Save' button in the dialog. A red box and number 5 points to the dropdown menu in the toolbar, which shows the saved view '22152 Customers'.

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.

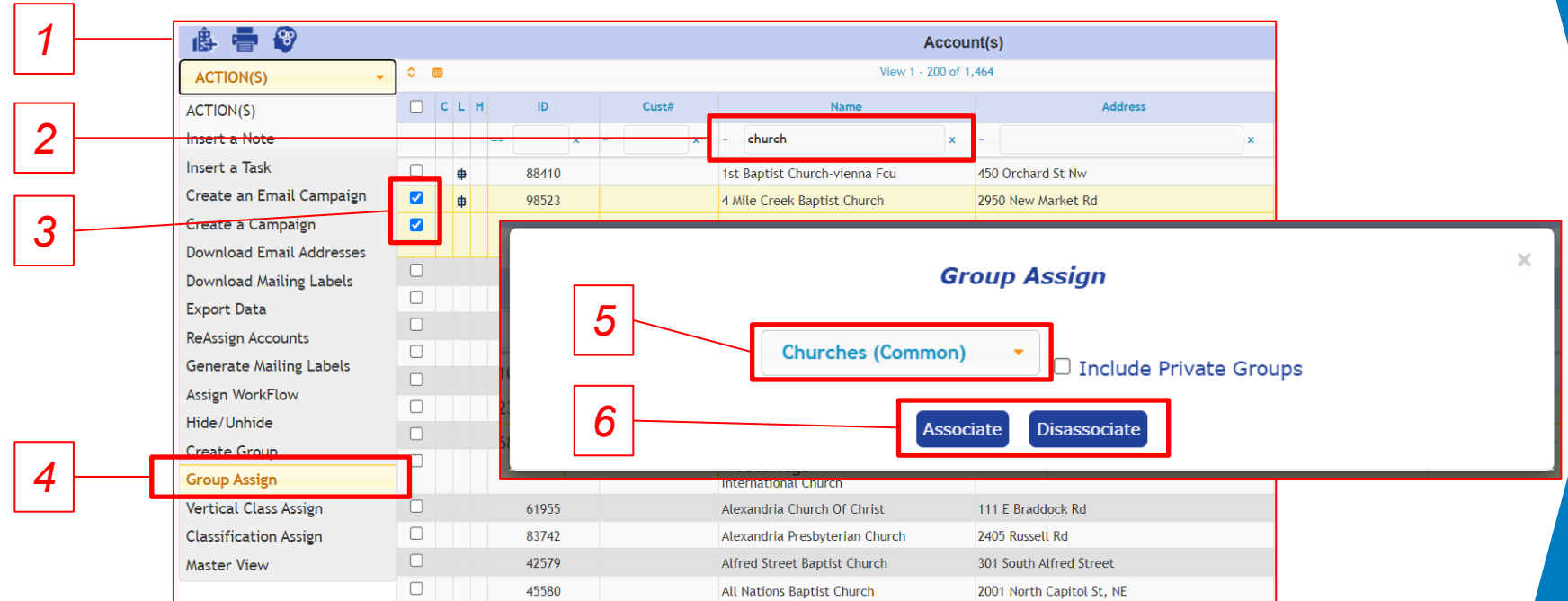
How To: Add or Remove Accounts From An Existing Group

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*



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

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

Quick Tips:

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

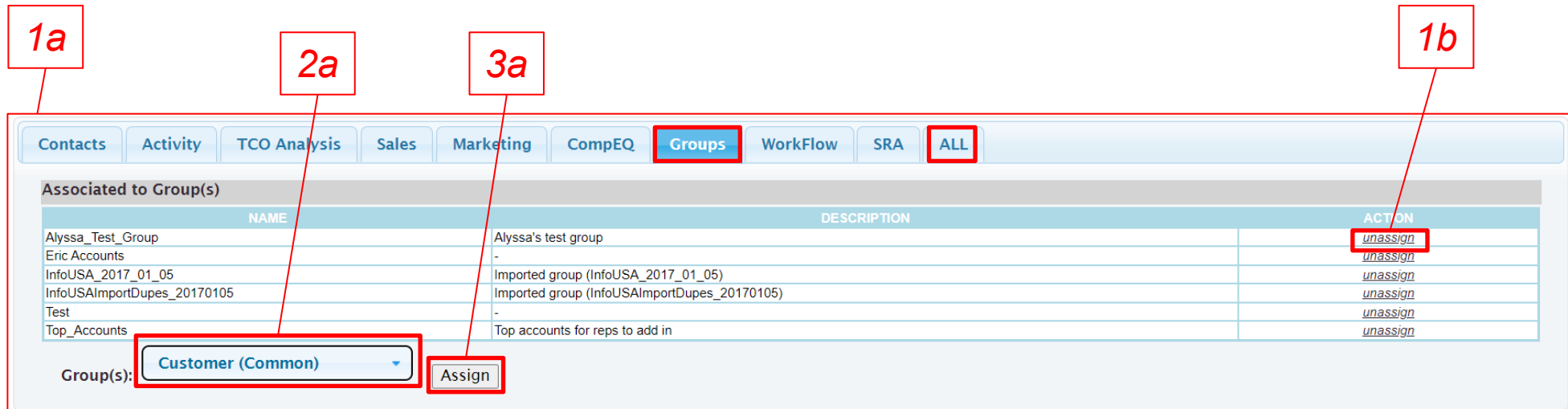
[View a tutorial Video Here](#)

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



The screenshot shows the SalesChain interface with the 'Groups' tab selected. The 'Associated to Group(s)' table is visible, listing various groups and their descriptions. The 'ACTION' column contains 'unassign' links for each group. Below the table, the 'Group(s):' dropdown is set to 'Customer (Common)', and the 'Assign' button is highlighted. Red callout boxes labeled 1a, 2a, 3a, and 1b point to the 'Groups' tab, the 'Assign' button, the 'Groups' dropdown, and the 'unassign' link respectively.

NAME	DESCRIPTION	ACTION
Alyssa_Test_Group	Alyssa's test group	unassign
Eric Accounts	-	unassign
InfoUSA_2017_01_05	Imported group (InfoUSA_2017_01_05)	unassign
InfoUSAImportDupes_20170105	Imported group (InfoUSAImportDupes_20170105)	unassign
Test	-	unassign
Top_Accounts	Top accounts for reps to add in	unassign

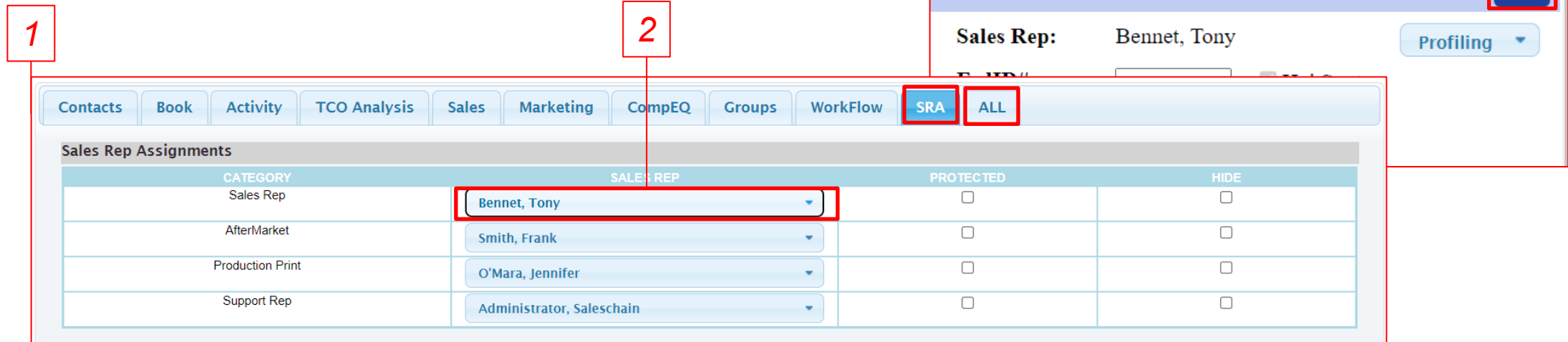
Group(s): Customer (Common) Assign

How To: Assign an Account to a Different Rep

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

To change an account's rep assignment:

1. Navigate to the account you would like to 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



The screenshot shows the 'Sales Rep Assignments' table with the following data:

CATEGORY	SALES REP	PROTECTED	HIDE
Sales Rep	Bennet, Tony	<input type="checkbox"/>	<input type="checkbox"/>
AfterMarket	Smith, Frank	<input type="checkbox"/>	<input type="checkbox"/>
Production Print	O'Mara, Jennifer	<input type="checkbox"/>	<input type="checkbox"/>
Support Rep	Administrator, Saleschain	<input type="checkbox"/>	<input type="checkbox"/>

Quick Tip:

It is possible to reassign accounts to a different rep in bulk using the accounts desk. [See page 59](#)


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.




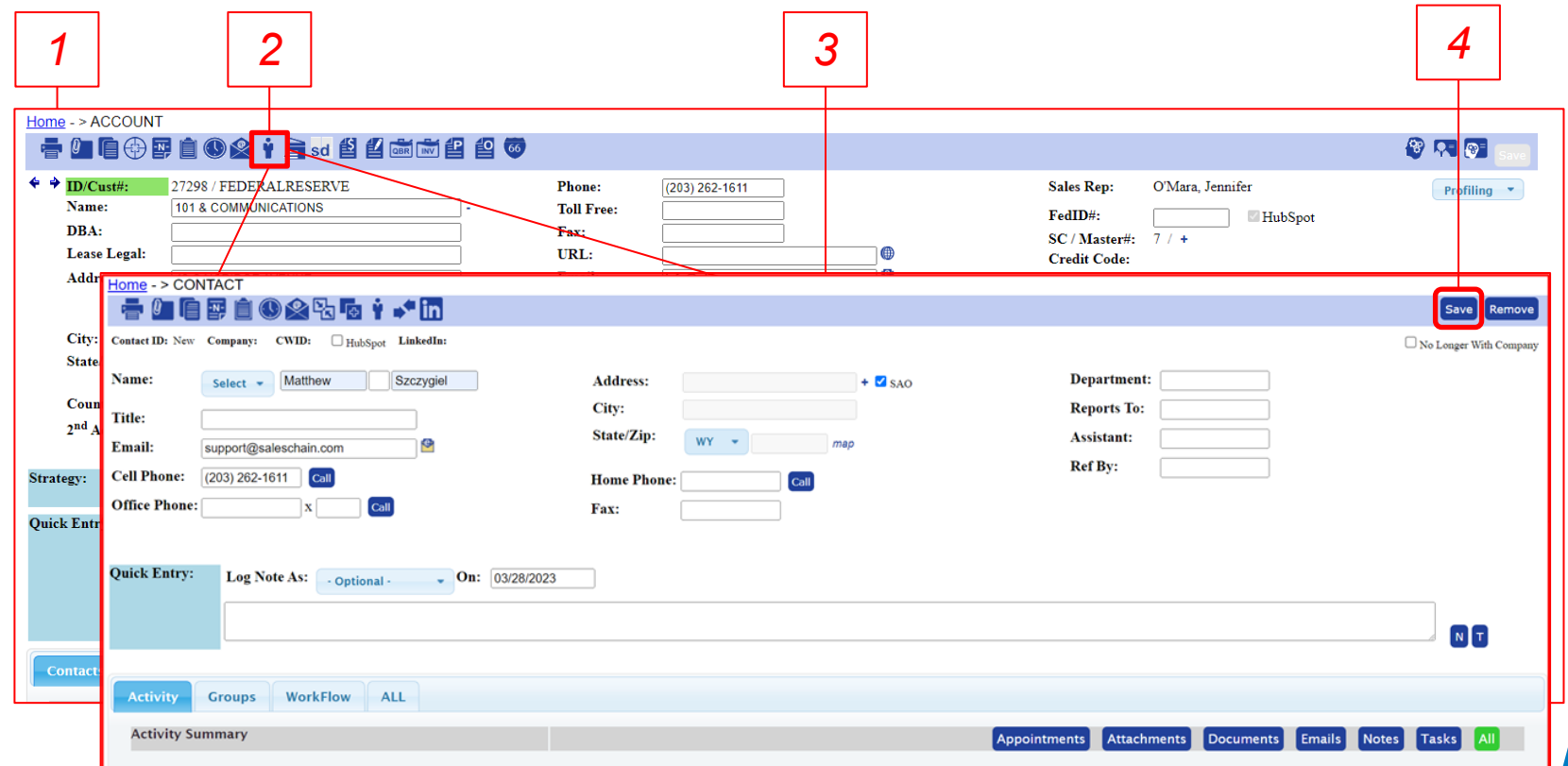
The screenshot shows the Customer Profile Viewer interface. The top bar includes a search toolbar (2), a column chooser (3), and a settings gear (4). The left sidebar contains an actions drop-down (5) and a list of search filters (6) including Branch, Sales Rep, Account Type, Classification, Industry Group, #Employees, Revenue, Target, Tier, and View Profile. Below the filters are checkboxes for 'Show Relationships' and 'Show Activities' (8). The main table displays a list of accounts with columns for Sales Rep, Name, Created, Target, SIC Code, Industry, #Emp, \$Rev, Class, and EDA. A search bar (9) is located above the table. The first account listed is Corbit, G, with details for *Loaner Equipment. The second account is Corbit, G, with details for *M & M Welding Fabricators. The third account is Corbit, G, with details for *Mantech International Corporation. The fourth account is O'Mara, J, with details for *Millennium Capital / First Trust National Mortgage. The fifth account is O'Mara, J, with details for *Mitre Corporation. The sixth account is Corbit, G, with details for *NOVA-Northern Virginia Community Hospital. The seventh account is Bastin, T, with details for *R & B Impressions, Inc.

How To: Add a Contact To an Account

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

To add a new contact:

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



The screenshot displays the 'ACCOUNT' and 'CONTACT' forms. The 'ACCOUNT' form is at the top, and the 'CONTACT' form is below it. The 'CONTACT' form has several fields for entering contact information, including Name, Title, Email, Cell Phone, Office Phone, Address, City, State/Zip, Home Phone, Fax, Department, Reports To, Assistant, and Ref By. The 'Save' button is located at the bottom right of the 'CONTACT' form.


Quick Tip:

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

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

Important: A merge of two accounts cannot be reversed. You will also need to be assigned as the sales rep for both accounts unless you have admin permissions. For instructions on changing sales rep assignment, see page 35.

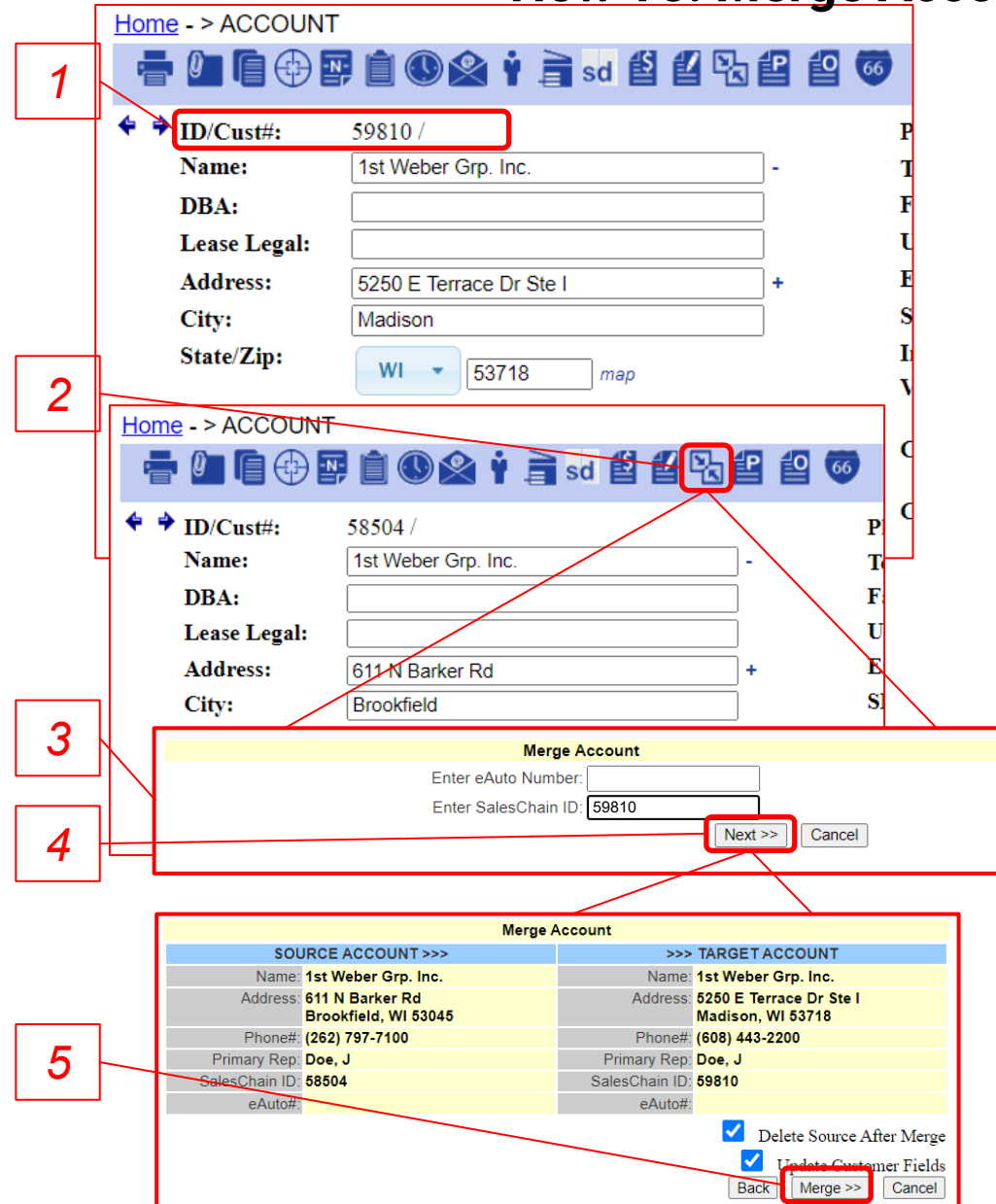
To merge accounts:

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.

How To: Merge Accounts



Step 1: Home - > ACCOUNT. ID/Cust#: 59810 /

Step 2: Home - > ACCOUNT. ID/Cust#: 58504 /

Step 3: Merge Account. Enter eAuto Number: [] Enter SalesChain ID: 59810

Step 4: Next >> [] Cancel []

Step 5: Merge Account

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

☒ Delete Source After Merge
☒ Update Customer Fields
 Back [] Merge >> [] Cancel []

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

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




Key:

- 1) Create a new contact (see page 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.



The screenshot shows the 'Contacts' screen with a table of contact records. Red boxes and numbers highlight specific features: 1. New contact icon; 2. Download icon; 3. Email icon; 4. Search toolbar; 5. Settings gear icon; 6. Actions drop-down menu; 7. Search drop-downs; 8. Column header search; 9. Contact details view; 10. Account details view.

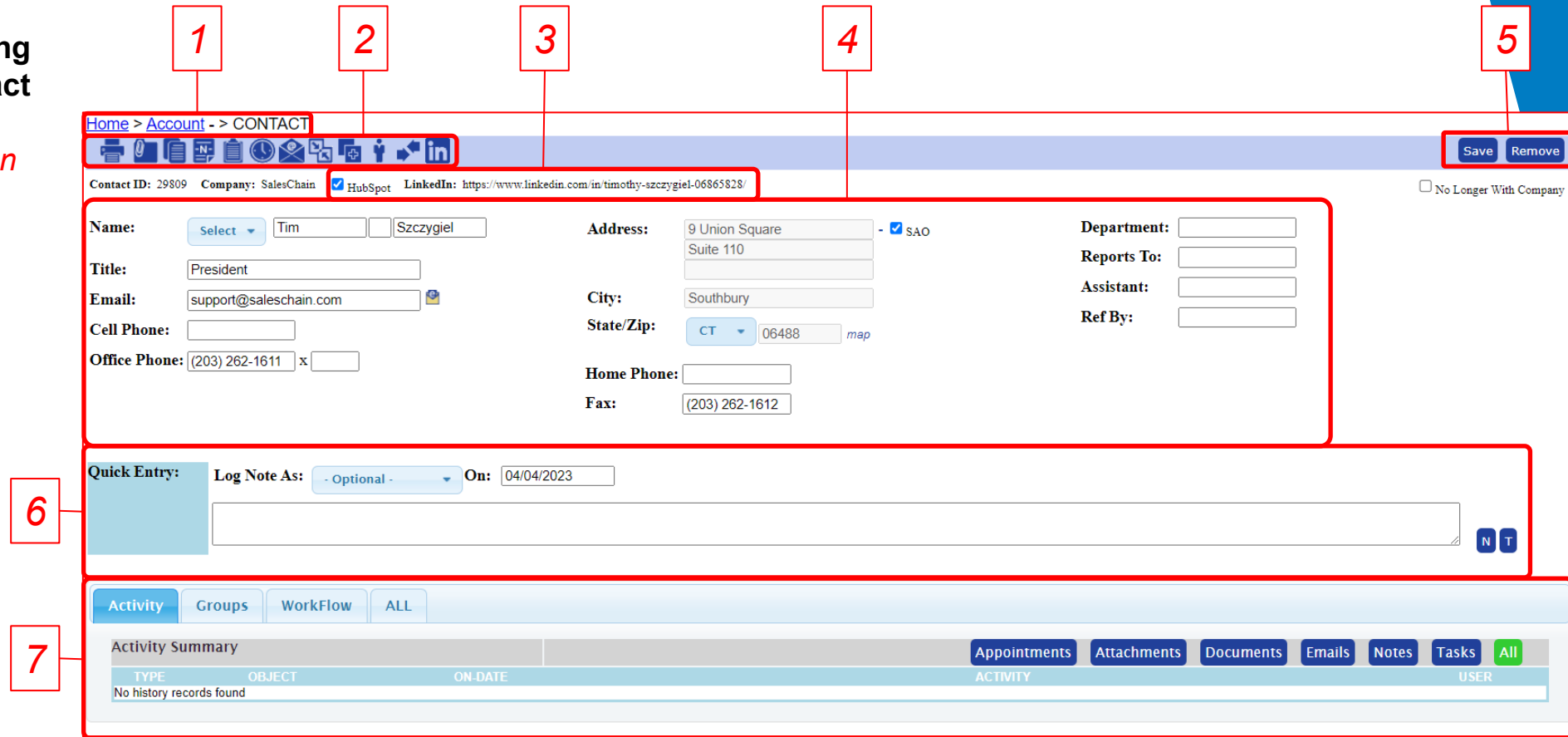
	First	Last	Title	Company	Email	Office	Cell	Fax
<input type="checkbox"/>	Ace	Custodio	Copy Room Manager	Plexus Scientific 4501 Ford Avenue Suite 1200 Alexandria, VA 22302	support@saleschain.com	7038458492		
<input type="checkbox"/>	Ada	DiMichele		Chevy Chase Club 6100 Connecticut Avenue Chevy Chase, MD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

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

**See Page 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



The screenshot shows the 'Contact View' interface for a contact named Tim Szczygiel. The interface is divided into several sections:

- Header:** Contains navigation links (Home > Account - > CONTACT) and a toolbar with various icons (1).
- Contact Information:** Displays contact details such as Contact ID (29809), Company (SalesChain), and social media links (HubSpot, LinkedIn) (3). It also includes fields for Name, Title, Email, Cell Phone, Office Phone, Address, City, State/Zip, Home Phone, Fax, Department, Reports To, Assistant, and Ref By (4).
- Quick Entry:** A section for logging notes, including a dropdown for 'Log Note As' and a date field 'On: 04/04/2023' (6).
- Activity History:** A section showing a summary of activities, with tabs for Activity, Groups, Workflow, and ALL. It includes a table with columns for Type, Object, On-Date, Activity, and User (7).
- Buttons:** Save and Remove buttons are located in the top right corner (5).



Action Icons in the Contact View

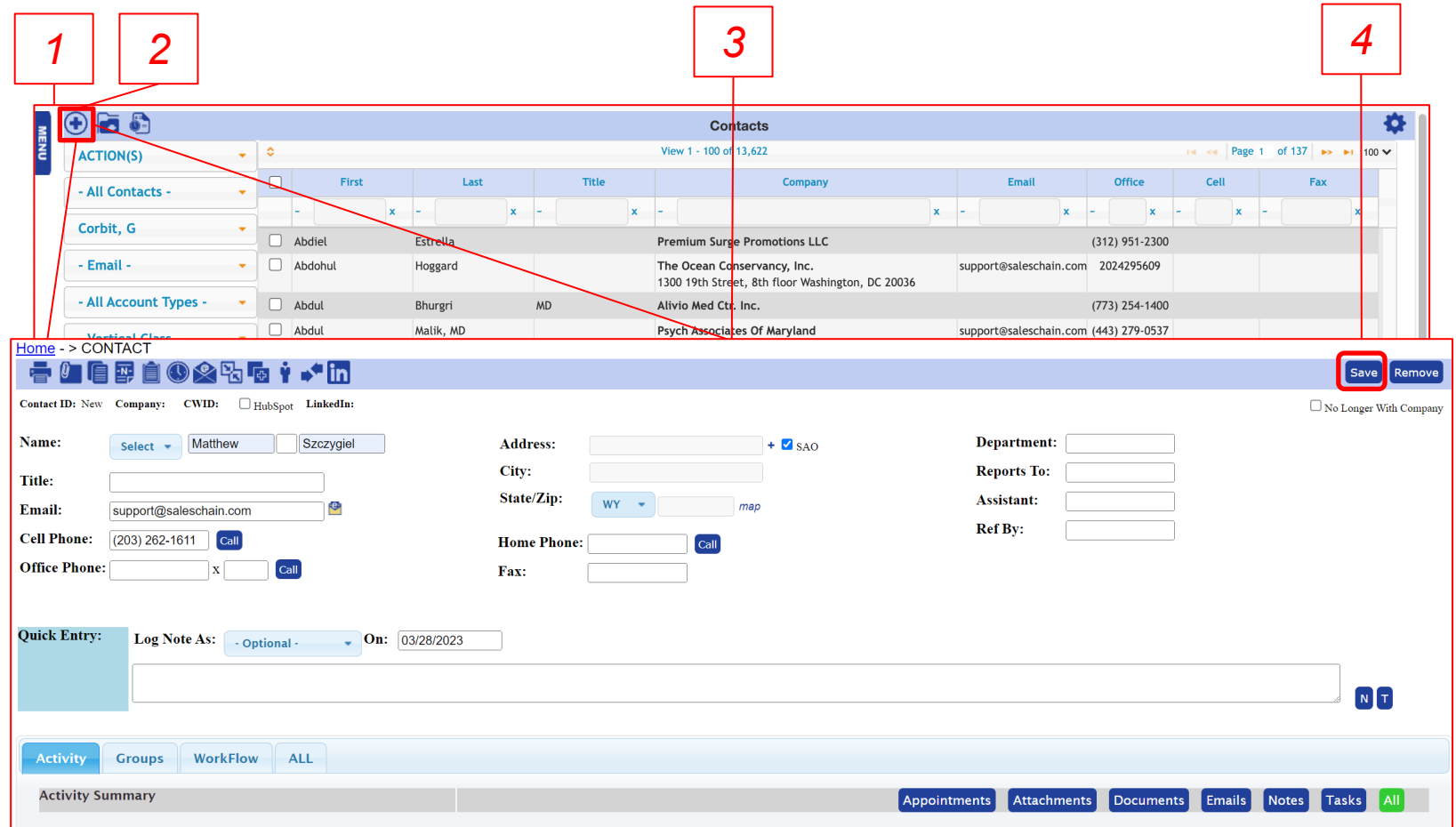
Icon	Associated Action
	Print this contact's Information
	Clone this contact
	Add or go to this contact's LinkedIn page (right click to edit)
	Attach a document to this contact
	Generate a document for this contact
	Add a new note to this contact
	Add a task to this contact
	Schedule an appointment with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



The screenshot shows the SalesChain Contacts interface. Red boxes and numbers 1 through 4 highlight the steps for creating a new contact:

- 1**: Points to the **NEW** button in the top left corner of the Contacts desk.
- 2**: Points to the **+** icon in the top left corner of the Contacts desk.
- 3**: Points to the **+** icon in the top left corner of the Contacts desk.
- 4**: Points to the **Save** button in the top right corner of the contact form.

The interface includes a **Contacts** table with columns: ACTION(S), First, Last, Title, Company, Email, Office, Cell, and Fax. The table shows a list of contacts, including Corbit, G, Abdiel, Estrella, Abdohul, Hoggard, Abdul, Bhurgri, MD, and Abdul, Malik, MD.

The **CONTACT** form below the table includes fields for:

- Name:** Select, Matthew, Szczygiel
- Title:** [Empty field]
- Email:** support@saleschain.com
- Cell Phone:** (203) 262-1611
- Office Phone:** [Empty field] x [Empty field]
- Address:** [Empty field] + ☒ SAO
- City:** [Empty field]
- State/Zip:** WY [Empty field] map
- Home Phone:** [Empty field]
- Fax:** [Empty field]
- Department:** [Empty field]
- Reports To:** [Empty field]
- Assistant:** [Empty field]
- Ref By:** [Empty field]

The **Quick Entry:** section includes a **Log Note As:** dropdown (Optional) and an **On:** date field (03/28/2023).



The bottom of the form features tabs for **Activity**, **Groups**, **WorkFlow**, and **ALL**. The **Activity Summary** section includes buttons for **Appointments**, **Attachments**, **Documents**, **Emails**, **Notes**, **Tasks**, and **All**.

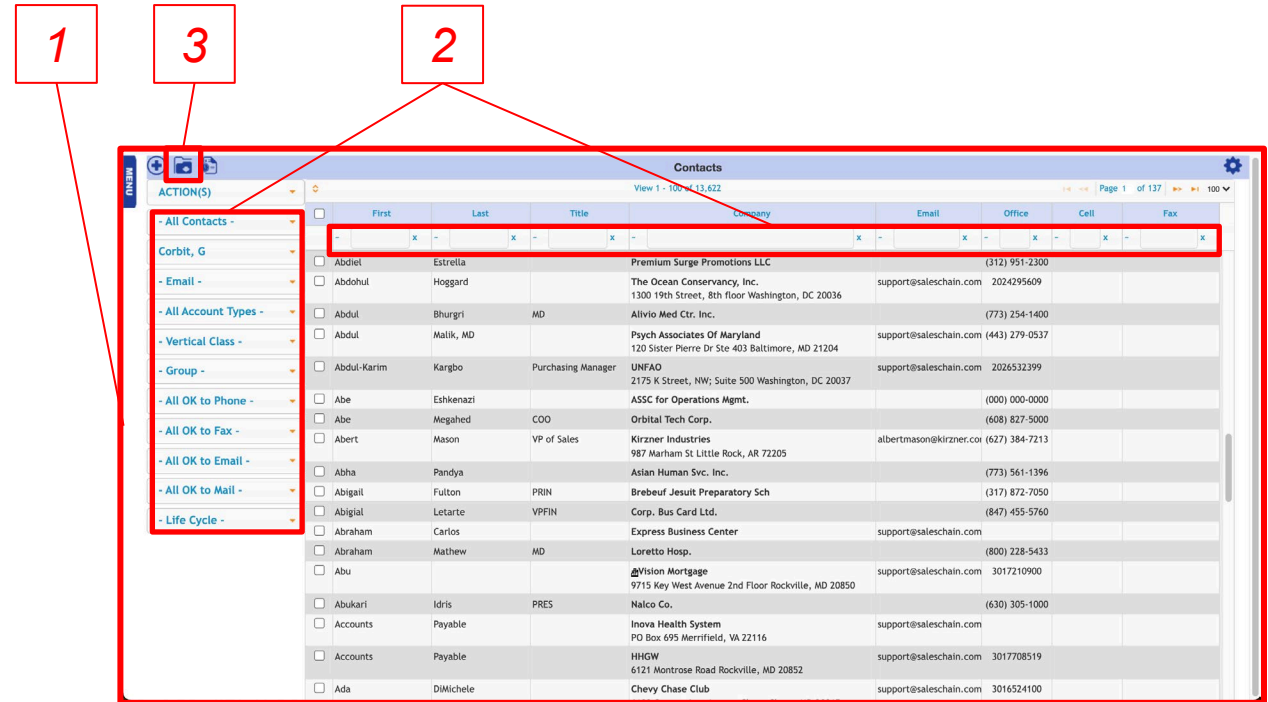
How To: Export a List of Contacts

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 



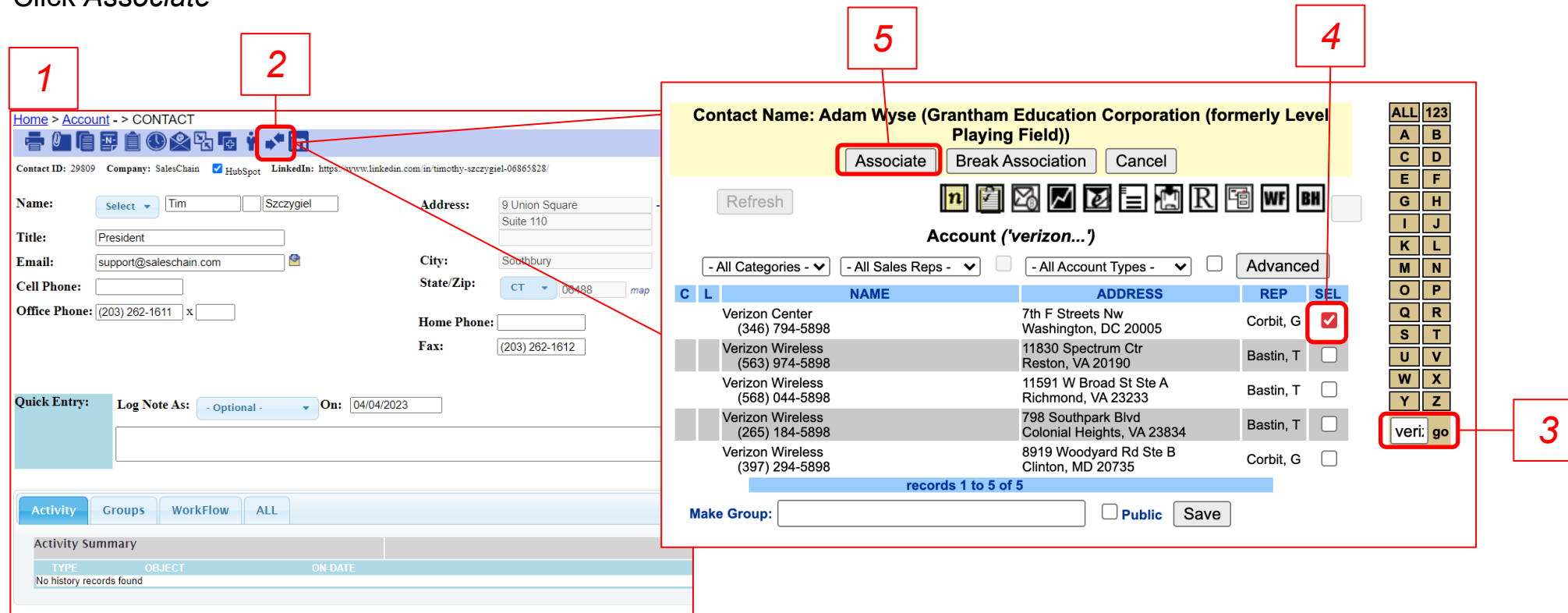
The screenshot shows the SalesChain Contacts Desk interface. A red box highlights the 'ACTION(S)' menu on the left, which contains the 'Export' icon (a document with a download arrow). A red box highlights the search criteria input fields at the top of the contact list. A red box highlights the 'Export' icon in the top right corner of the interface.

First	Last	Title	Company	Email	Office	Cell	Fax
Abdiel	Estrella		Premium Surge Promotions LLC		(312) 951-2300		
Abdohul	Hoggard		The Ocean Conservancy, Inc. 1300 19th Street, 8th floor Washington, DC 20036	support@saleschain.com	2024295609		
Abdul	Bhurgri	MD	Alivio Med Ctr. Inc.		(773) 254-1400		
Abdul	Malik, MD		Psych Associates Of Maryland 120 Sister Pierre Dr Ste 403 Baltimore, MD 21204	support@saleschain.com	(443) 279-0537		
Abdul-Karim	Kargbo	Purchasing Manager	UNFAO 2175 K Street, NW; Suite 500 Washington, DC 20037	support@saleschain.com	2026532399		
Abe	Eshkenazi		ASSC for Operations Mgmt.		(000) 000-0000		
Abe	Megahed	COO	Orbital Tech Corp.		(608) 827-5000		
Abert	Mason	VP of Sales	Kirzner Industries 987 Marham St Little Rock, AR 72205	albertmason@kirzner.co	(627) 384-7213		
Abha	Pandya		Asian Human Svc. Inc.		(773) 561-1396		
Abigail	Fulton	PRIN	Brebeuf Jesuit Preparatory Sch		(317) 872-7050		
Abigail	Letarte	VPPIN	Corp. Bus Card Ltd.		(847) 455-5760		
Abraham	Carlos		Express Business Center	support@saleschain.com			
Abraham	Mathew	MD	Loretto Hosp.		(800) 228-5433		
Abu			AVision Mortgage 9715 Key West Avenue 2nd Floor Rockville, MD 20850	support@saleschain.com	3017210900		
Abukari	Idris	PRES	Nalco Co.		(630) 305-1000		
Accounts	Payable		Inova Health System PO Box 695 Merrifield, VA 22116	support@saleschain.com			
Accounts	Payable		HNGW 6121 Montrose Road Rockville, MD 20852	support@saleschain.com	3017708519		
Ada	DiWichele		Chevy Chase Club	support@saleschain.com	3016524100		

How To: Move a Contact From One Account to Another

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

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



1 Home > Account -> CONTACT

Contact ID: 29809 Company: SalesChain HubSpot LinkedIn: https://www.linkedin.com/in/timothy-szczygiel-06865828/

Name: Select Tim Szczygiel Address: 9 Union Square Suite 110

Title: President

Email: support@saleschain.com City: Southbury

Cell Phone: State/Zip: CT 06488 map

Office Phone: (203) 262-1611 x Home Phone: Fax: (203) 262-1612

Quick Entry: Log Note As: - Optional - On: 04/04/2023

2 **5** **4**

3

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

Associate Break Association Cancel

Refresh

Account ('verizon...')

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

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

records 1 to 5 of 5


Make Group: Public Save

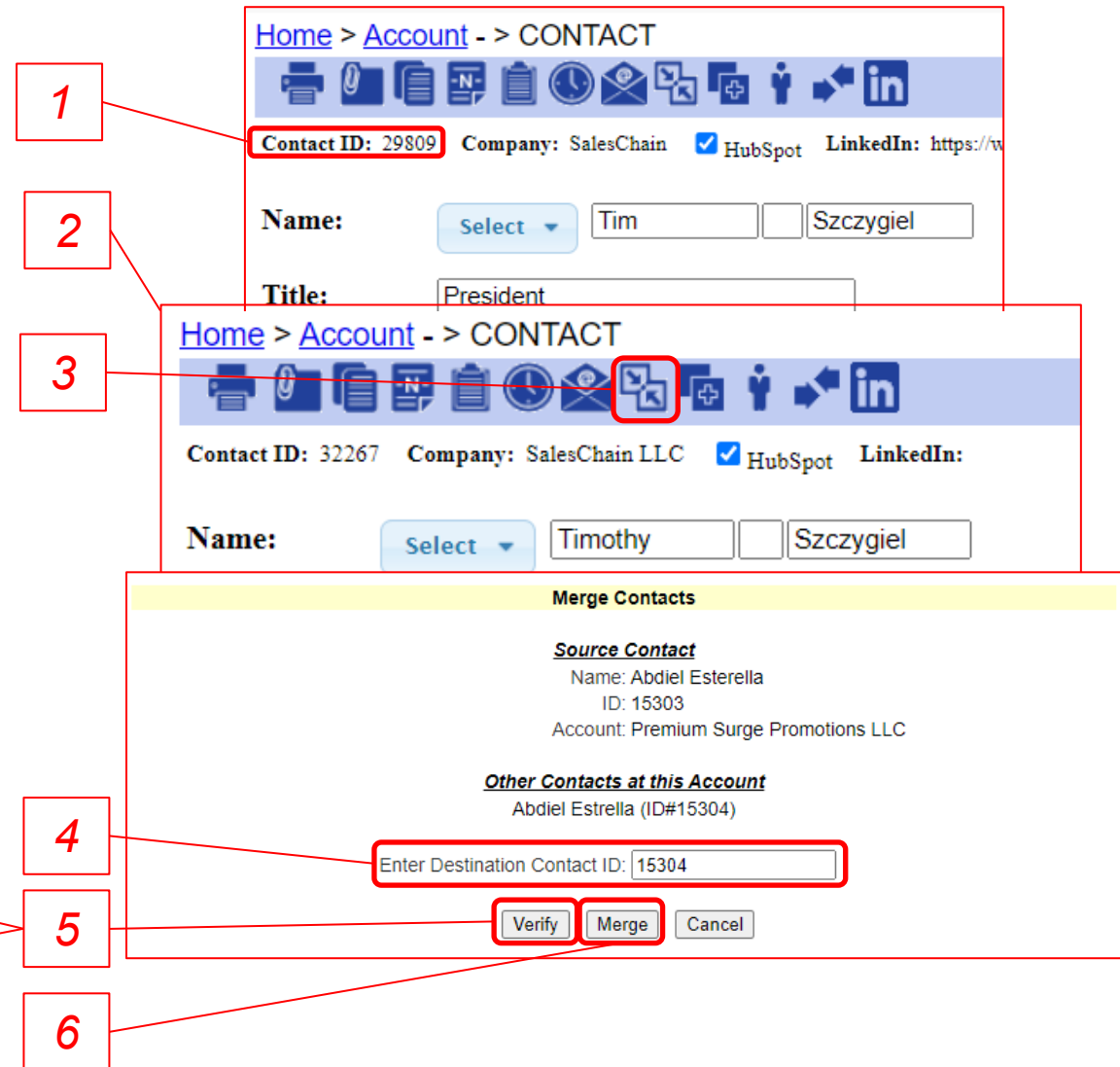
ALL 123 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z veri: go

How To: Merge Contacts

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

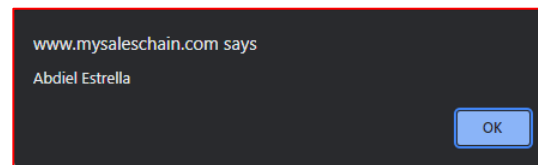
To merge Contacts:

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*



The screenshot shows the SalesChain interface for merging contacts. It consists of three main panels:

- Top Panel (Step 1):** Shows the 'CONTACT' page for a contact with ID 29809. The contact's name is Tim Szczygiel, and the title is President.
- Middle Panel (Step 3):** Shows the 'CONTACT' page for a contact with ID 32267. The contact's name is Timothy Szczygiel, and the title is President. A red box highlights the 'merge contacts' icon in the top navigation bar.
- Bottom Panel (Steps 4-6):** Shows the 'Merge Contacts' dialog box. It displays the 'Source Contact' information (Name: Abdiel Esterella, ID: 15303, Account: Premium Surge Promotions LLC) and 'Other Contacts at this Account' (Abdiel Estrella (ID#15304)). A text field labeled 'Enter Destination Contact ID:' contains the value 15304. Below the text field are three buttons: 'Verify', 'Merge', and 'Cancel'.

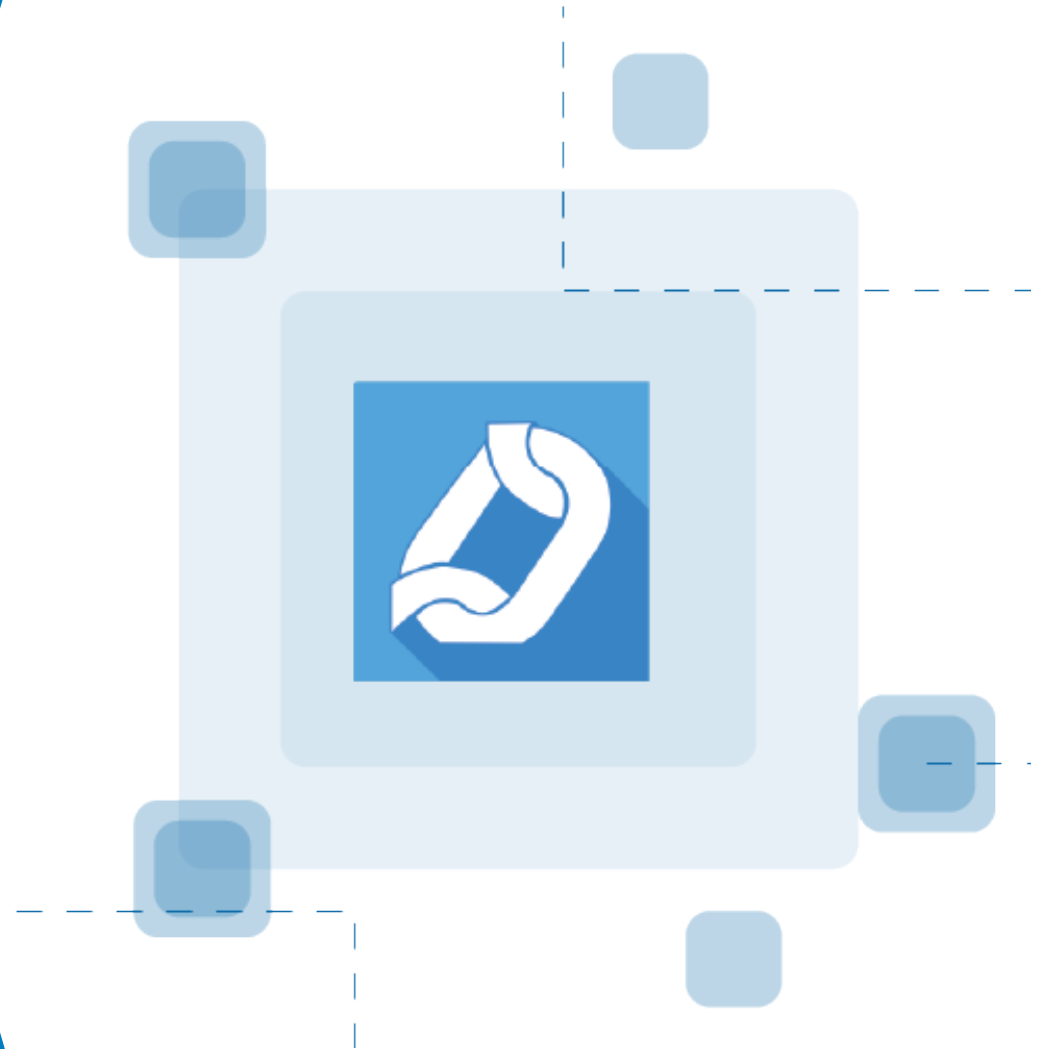


The screenshot shows a confirmation message from www.mysaleschain.com. The message text is 'Abdiel Estrella'. There is an 'OK' button at the bottom right of the message box.

3

Actions, Activities and Appointments:

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



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

To view the schedule desk:

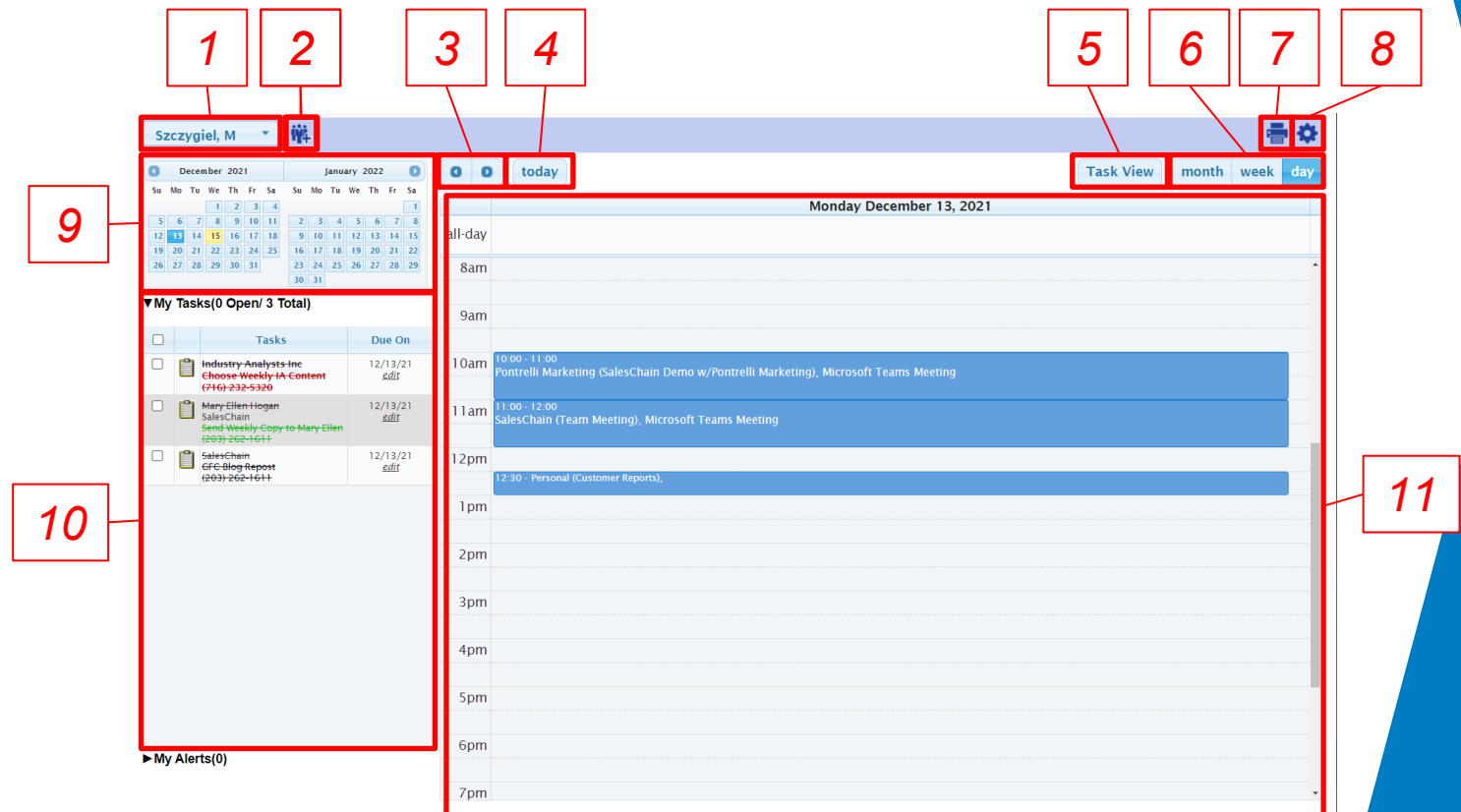
- Click on the schedule icon 
- OR Navigate to: *Menu Sidebar > Accounts and Activity > Schedule*

Key:

- 1) User selection for whose schedule you're viewing
- 2) Add another user's schedule to the current view
- 3) Navigate forward or backward
- 4) Jump back to the current date
- 5) Go to the task view (See page 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.



The screenshot shows the SalesChain Schedule Desk interface. At the top, there's a header bar with a user selection dropdown (1) showing 'Szcztygiel, M', a plus icon (2) to add another user, and navigation buttons (3) for forward/backward and (4) for jumping back to the current date. On the right of the header are buttons for 'Task View' (5), 'month' (6), 'week' (7), and 'day' (8) views. Below the header is a calendar grid (9) for December 2021 and January 2022. The 'today' button is highlighted. The main area shows a detailed view for Monday, December 13, 2021, with a timeline from 8am to 7pm. A task sidebar (10) on the left lists tasks like 'Industry Analysts Inc Choose Weekly IA Content' and 'Mary Ellen Hogan SalesChain Send Weekly Copy to Mary Ellen'. The main schedule view (11) shows appointments like 'Pontrelli Marketing (SalesChain Demo w/ Pontrelli Marketing), Microsoft Teams Meeting' and 'SalesChain (Team Meeting), Microsoft Teams Meeting'.

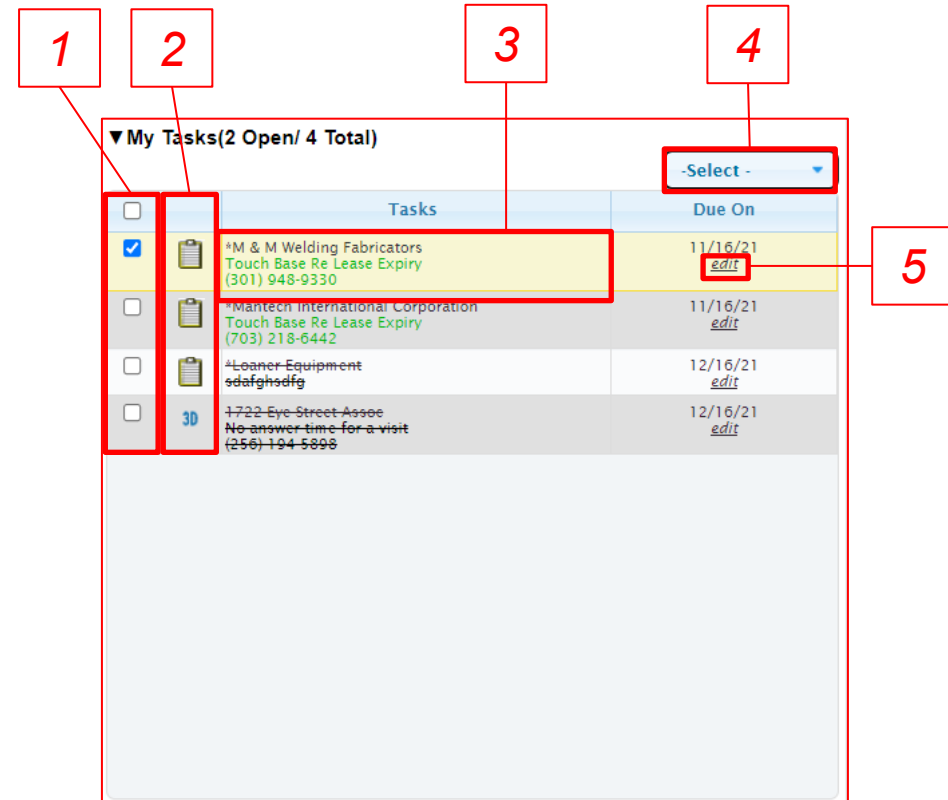
The task sidebar allows you to view, edit and act on tasks individually or in bulk right from the schedule desk.

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.



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

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

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

Schedule Desk: Task View

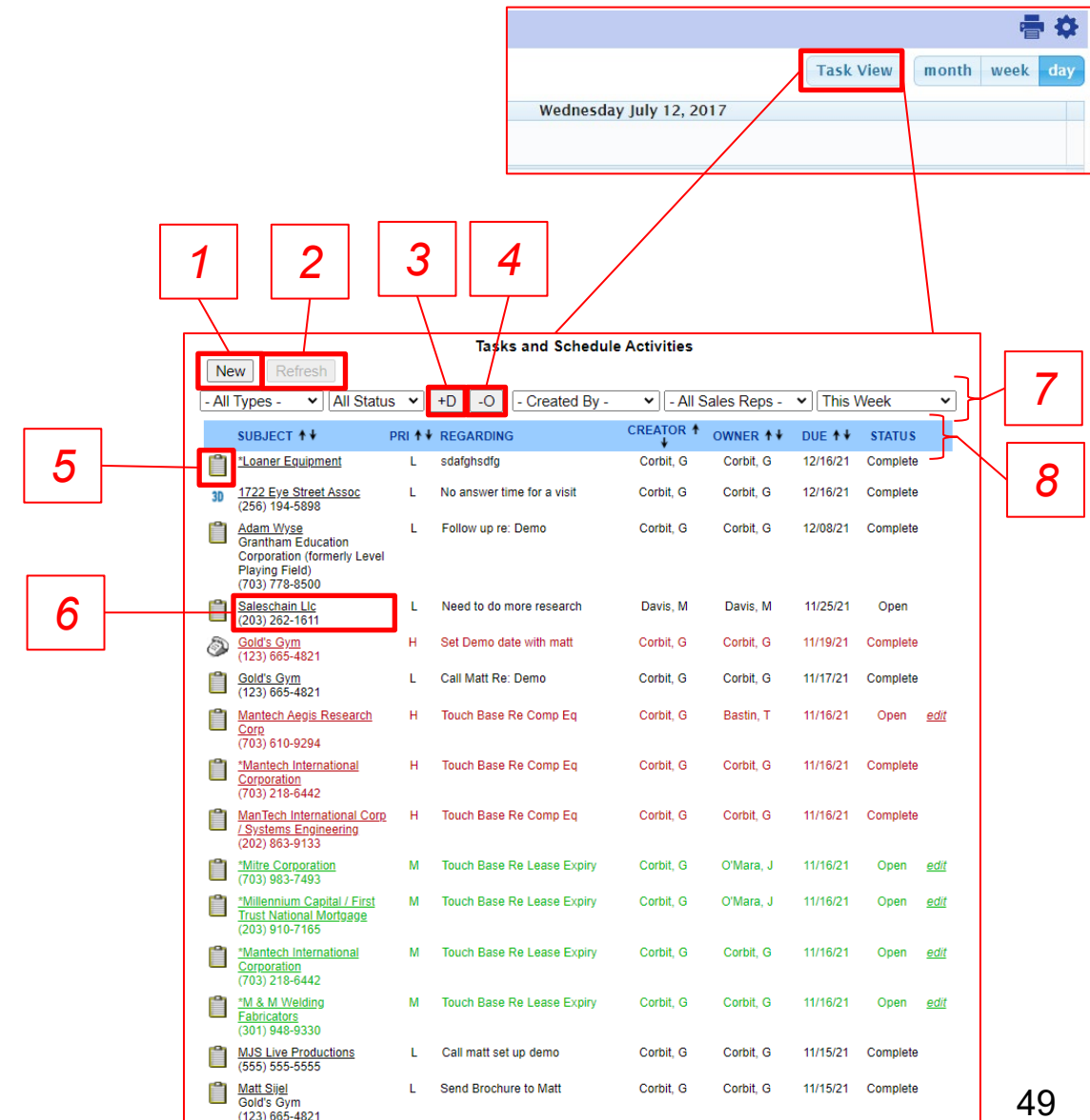
The task view displays a comprehensive list of all tasks that you have access to within the system.

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.



The screenshot shows the 'Task View' interface in the Schedule Desk. At the top, there's a header with 'Task View' and filters for 'month', 'week', and 'day'. Below this, a date 'Wednesday July 12, 2017' is displayed. The main area is titled 'Tasks and Schedule Activities' and contains a table of tasks. The table has columns for 'SUBJECT', 'PRI', 'REGARDING', 'CREATOR', 'OWNER', 'DUE', and 'STATUS'. The tasks are listed with their respective details, including subject names, priorities, and due dates. Numbered callouts 1-8 point to specific UI elements: 1 points to the 'New' button, 2 points to the 'Refresh' button, 3 points to the '+D' button, 4 points to the '-O' button, 5 points to a task icon, 6 points to a task's associated account, 7 points to the filter dropdowns, and 8 points to the column headers.


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

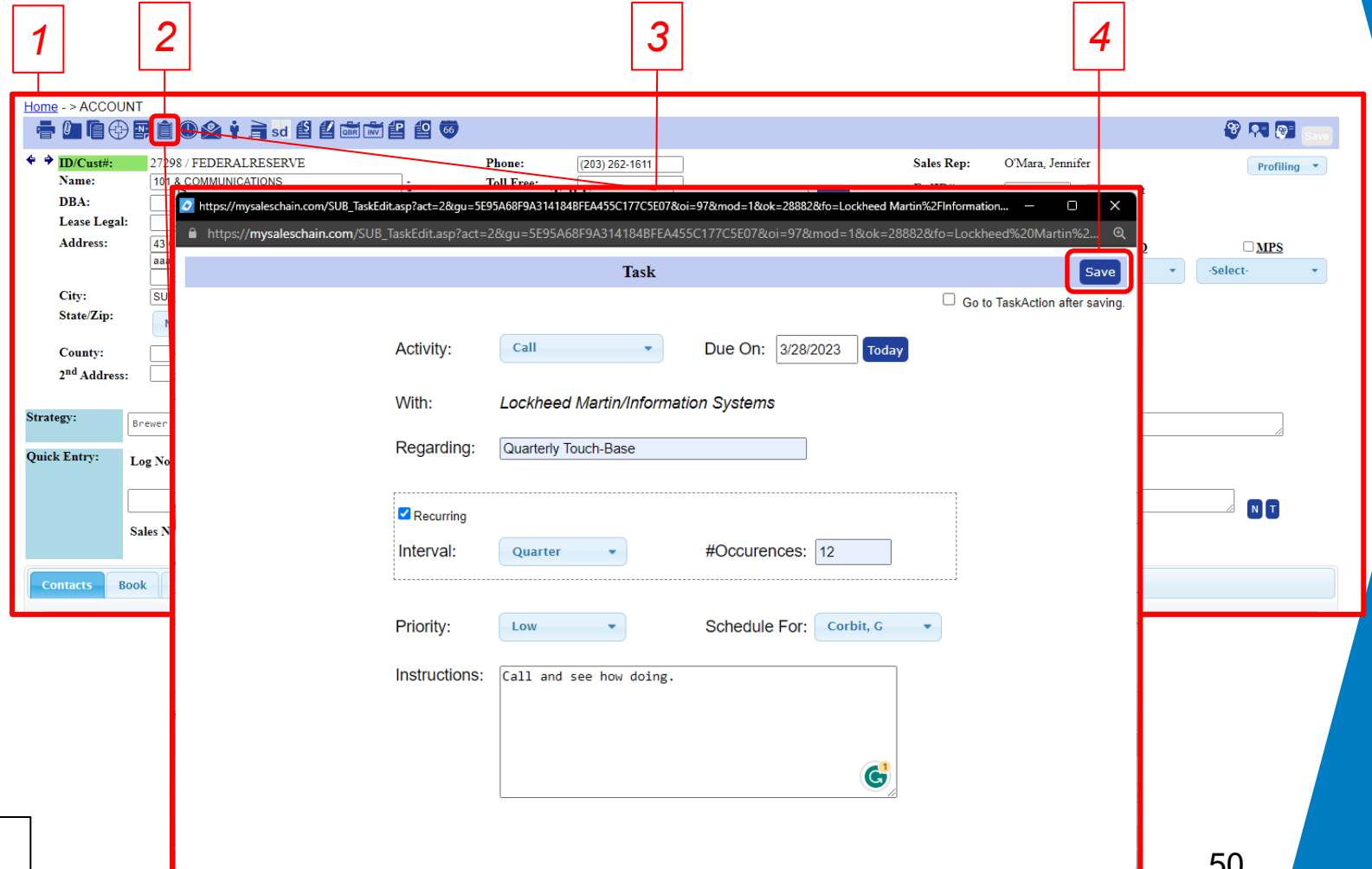
How To: Create a New Task From the Account View

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

[View a video tutorial](#)

To Create a Task:

1. Navigate to the account to which you would like to add an activity (See Page 18)
2. Click on the *new task* icon 
3. In the Pop-Up, enter task information
4. Click Save



The screenshot illustrates the process of creating a new task from an account view. A red box highlights the 'new task' icon (labeled 2) in the top toolbar. Another red box highlights the 'Task' pop-up form (labeled 3) which is open. The form contains the following fields and options:

- Activity:** Call (dropdown)
- Due On:** 3/28/2023 (calendar icon)
- With:** Lockheed Martin/Information Systems
- Regarding:** Quarterly Touch-Base
- Recurring:** ☒ (checked)
- Interval:** Quarter (dropdown)
- #Occurrences:** 12
- Priority:** Low (dropdown)
- Schedule For:** Corbit, G (dropdown)
- Instructions:** Call and see how doing.
- Save:** (button, labeled 4)
- Go To TaskAction after saving:** ☐ (checkbox)

Quick Tip:

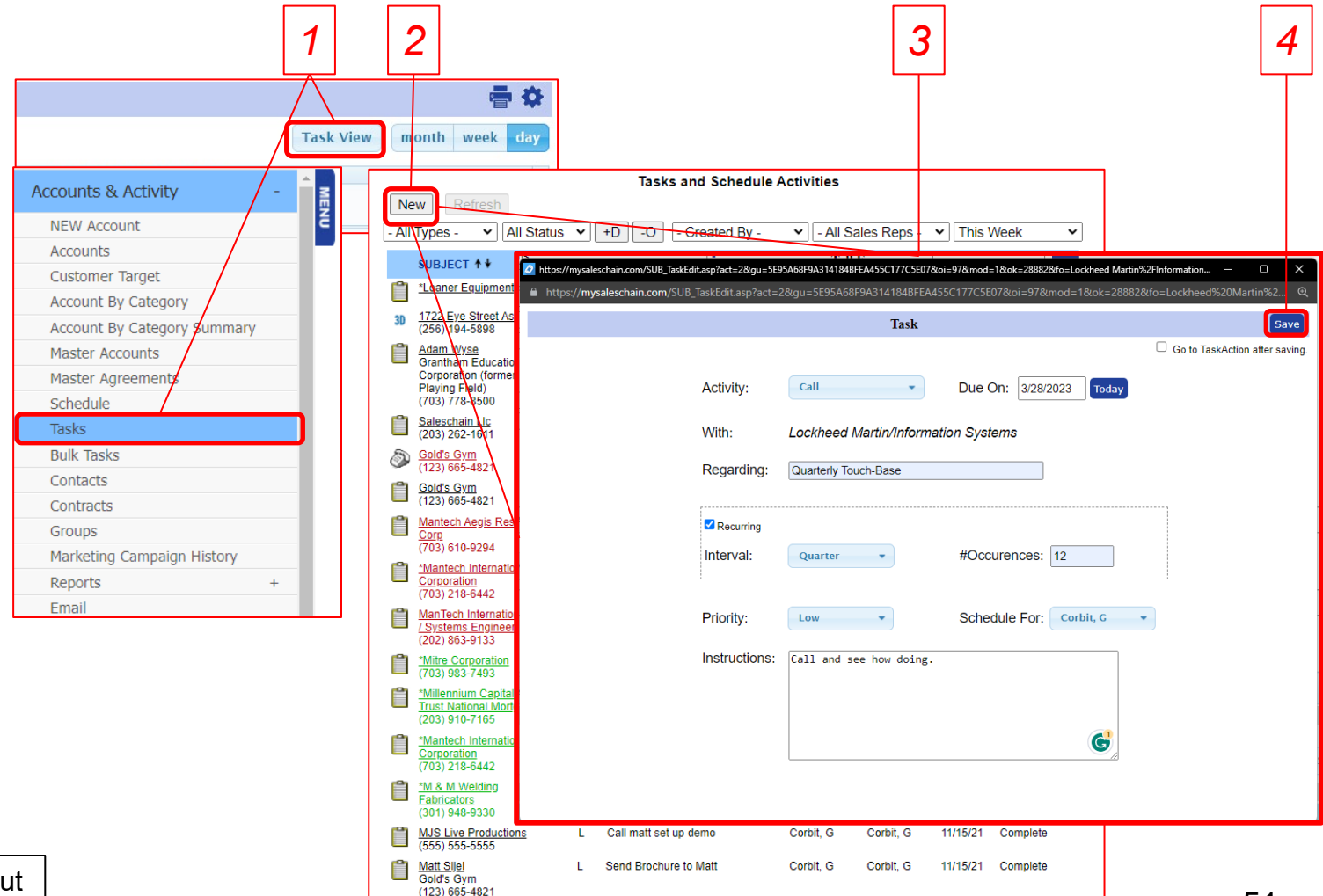
Check the box next to *Go To Task Action after saving* to jump directly to completing this task.

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*



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

- 1:** Points to the 'Task View' button in the top navigation bar.
- 2:** Points to the 'New' button in the 'Tasks and Schedule Activities' section.
- 3:** Points to the task creation form, specifically the 'Activity' dropdown menu.
- 4:** Points to the 'Save' button in the top right corner of the task form.

The task form contains the following fields and options:

- Activity:** Call (dropdown)
- Due On:** 3/28/2023 (calendar icon)
- With:** Lockheed Martin/Information Systems
- Regarding:** Quarterly Touch-Base
- Recurring:** ☒ (checkbox)
- Interval:** Quarter (dropdown)
- #Occurrences:** 12
- Priority:** Low (dropdown)
- Schedule For:** Corbit, G (dropdown)
- Instructions:** Call and see how doing.

At the bottom of the screenshot, a table lists existing tasks:

Task	Activity	Due On	Status
Call matt set up demo	Call	11/15/21	Complete
Send Brochure to Matt	Call	11/15/21	Complete

Quick Tip:

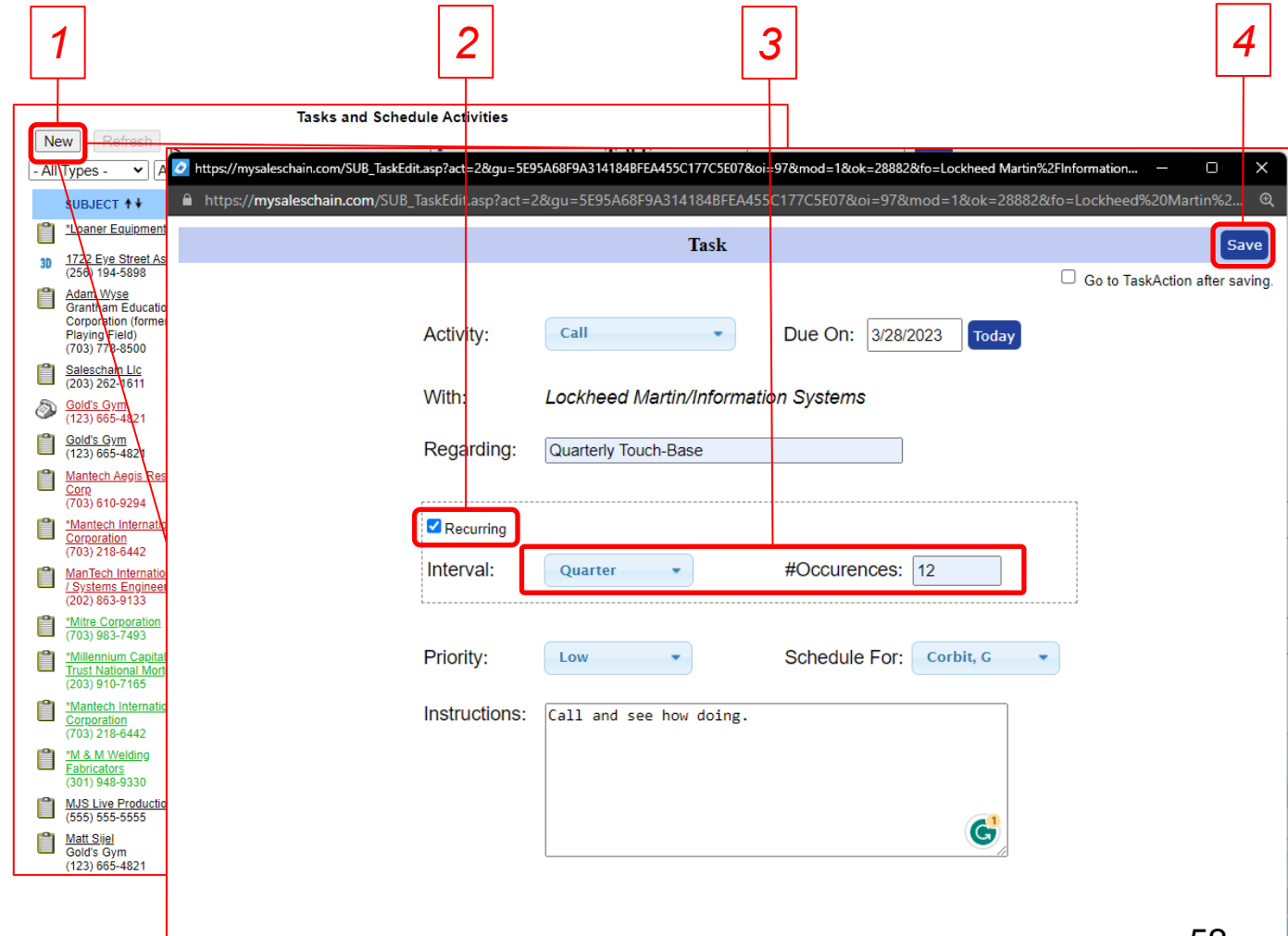
Tasks created from the task view will be created without an account association.

How To: Create a Recurring Task

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

To create a recurring task:

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



The screenshot shows the 'Tasks and Schedule Activities' window in SalesChain. The interface includes a left sidebar with a list of contacts, a main task creation form, and a top navigation bar. Four red boxes with numbers 1 through 4 highlight specific steps in the process:

- 1**: Points to the 'New' button in the top left of the task creation area.
- 2**: Points to the 'Recurring' checkbox, which is checked.
- 3**: Points to the 'Interval' dropdown menu, which is set to 'Quarter', and the '#Occurrences' field, which is set to '12'.
- 4**: Points to the 'Save' button in the top right corner of the task form.


The task form fields visible include:

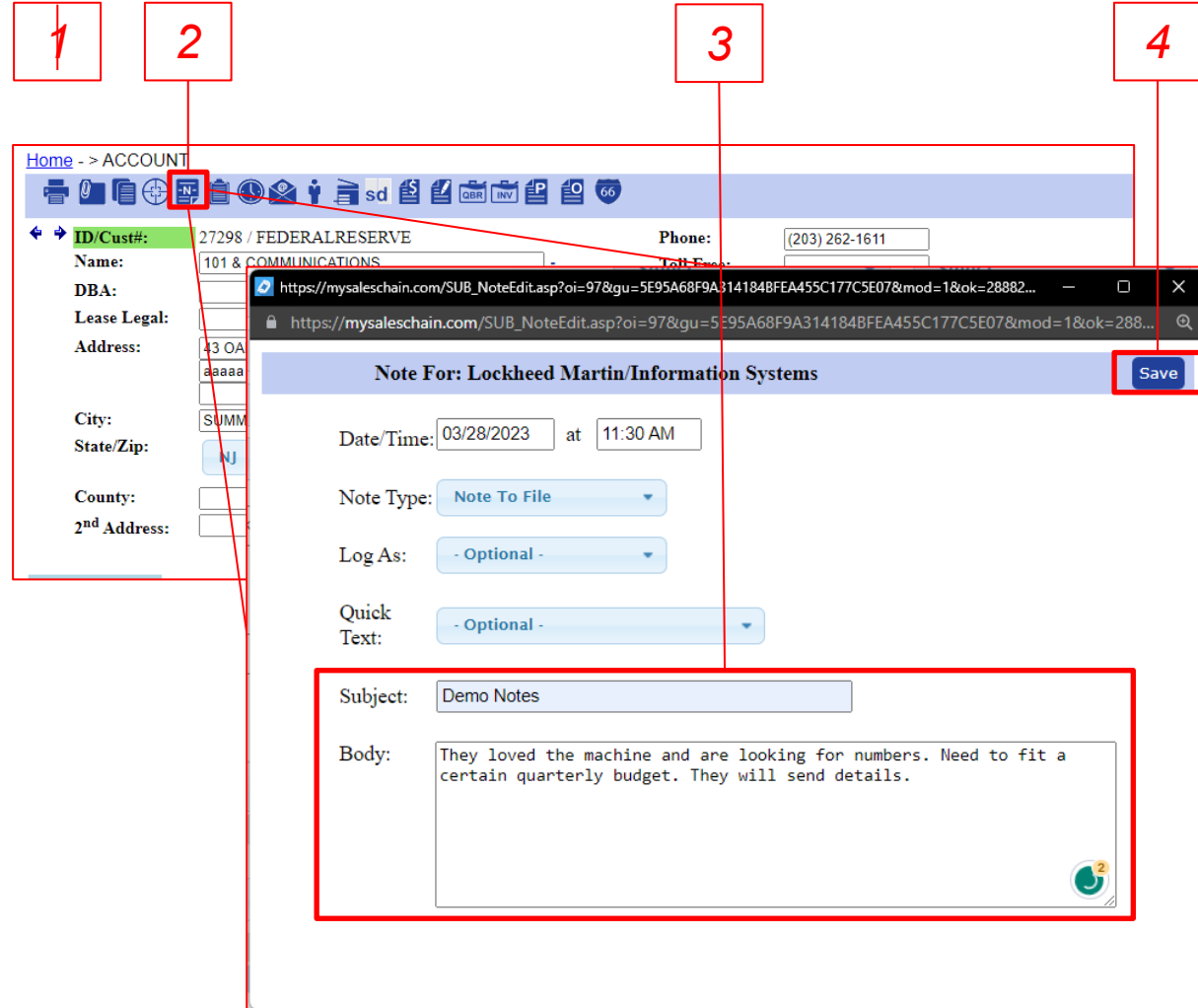
- Activity**: Call
- Due On**: 3/28/2023
- With**: Lockheed Martin/Information Systems
- Regarding**: Quarterly Touch-Base
- Priority**: Low
- Schedule For**: Corbit, G
- Instructions**: Call and see how doing.

How To: Add a Note to An Account

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

To add a note to an account:

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



The screenshot shows the SalesChain interface. On the left, the 'ACCOUNT' page for '27298 / FEDERALRESERVE' is visible. A red box labeled '1' highlights the 'New Note' icon in the top navigation bar. A red box labeled '2' highlights the 'New Note' icon in the account page. A red box labeled '3' highlights the 'Note For: Lockheed Martin/Information Systems' form, which includes fields for Date/Time, Note Type, Log As, Quick Text, Subject, and Body. A red box labeled '4' highlights the 'Save' button in the top right corner of the form.

Quick Tip:

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

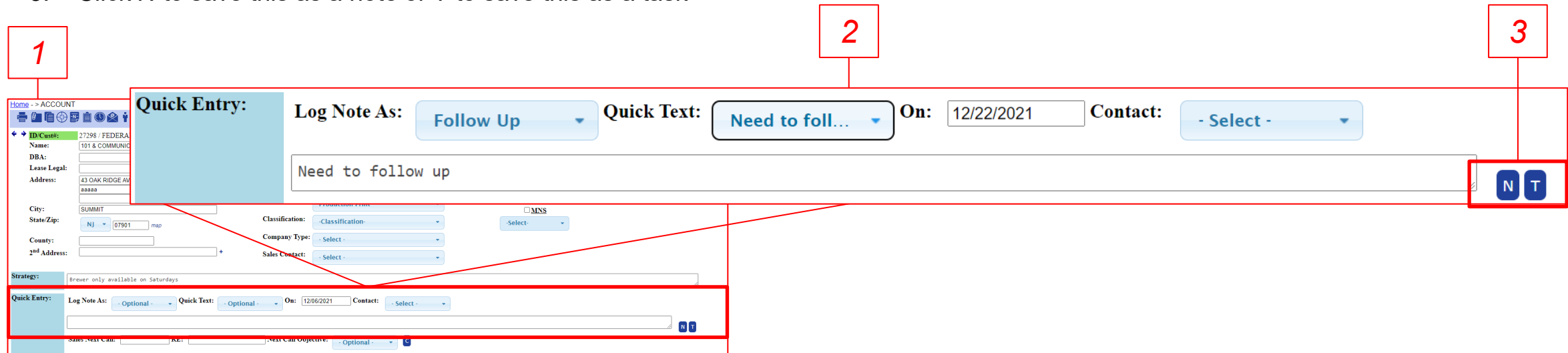
How To: Create Quick Tasks and Quick Notes

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

[View a tutorial video here.](#)

To use the quick entry dialogue:

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



The screenshot shows the 'ACCOUNT' view for a customer. A red box labeled '1' highlights the account details on the left. A red box labeled '2' highlights the 'Quick Entry' section, which includes a 'Log Note As' dropdown (set to 'Follow Up'), a 'Quick Text' dropdown (set to 'Need to follow up'), an 'On' date field (12/22/2021), and a 'Contact' dropdown (set to '- Select -'). A red box labeled '3' highlights the 'N' and 'T' buttons at the bottom right of the 'Quick Entry' section, used to save the entry as a note or task respectively.

Quick Tip:

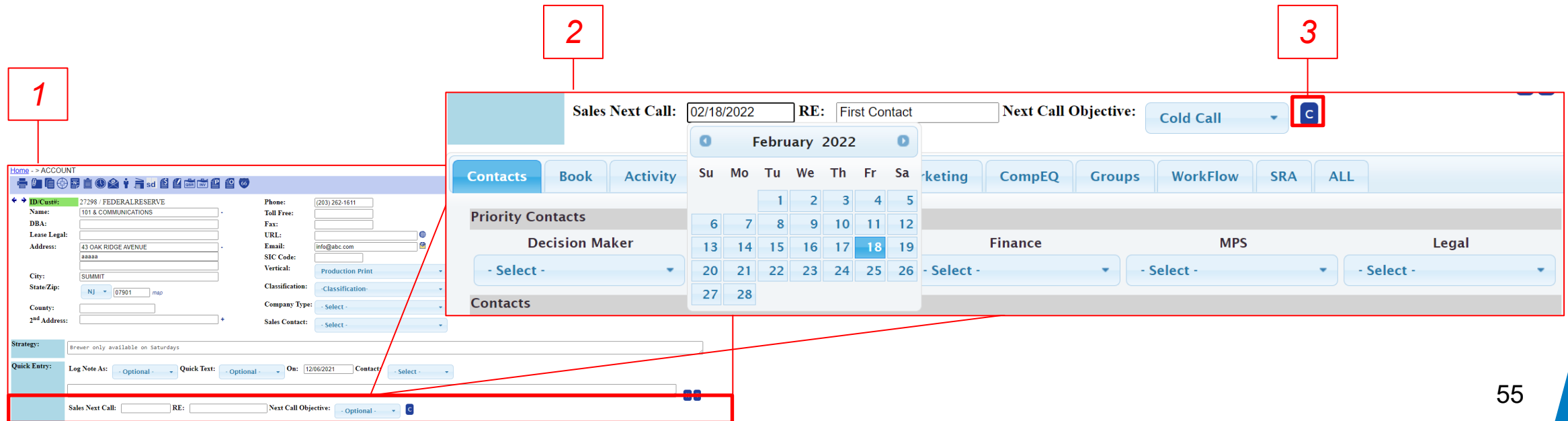
Use the **Quick Text** drop down to quickly add note or task text that is commonly used for repetitive tasks or notes.

How To: Add A Sales Next Call Date

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

To add a sales next call task:

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



The screenshot displays the 'Quick Entry' section of the SalesChain system. The interface includes a sidebar with account details and a main area for task entry. Red boxes and numbers 1, 2, and 3 highlight the steps for adding a sales next call task.

Step 1: The account selection is shown in the sidebar. The account name is '27298 / FEDERAL RESERVE'.

Step 2: The task information entry is shown in the main area. The 'Sales Next Call' field is set to '02/18/2022', the 'RE:' field is 'First Contact', and the 'Next Call Objective' is 'Cold Call'. A calendar for February 2022 is displayed, showing the date 18th selected.

Step 3: The 'C' button is highlighted, indicating the action to save the task.

The 'Quick Entry' section includes fields for 'Log Note As', 'Quick Text', 'On' (12/06/2021), and 'Contact' (- Select -). The 'Sales Next Call' field is also present, with 'RE:' and 'Next Call Objective' (- Select -) fields.

How To: Insert Tasks in Bulk

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.

CREATE BULK TASKS: 5 Account(s) select

Assign Tasks to:

OR...

AfterMarket

ty: :

1

2

3

4

5

6

Account

ACTION(S)

View 1 - 5 of 5

ACTION(S)	C	L	H	ID	Cust#	Name
Insert a Note						101
Insert a Task	<input checked="" type="checkbox"/>			27298	FEDERALRESERVE	101 & COMMUNICATIONS
Create an Email Campaign	<input checked="" type="checkbox"/>			61986		101 North Ripley Apartments
Create a Campaign	<input checked="" type="checkbox"/>			75161		Co 101
Download Email Addresses	<input checked="" type="checkbox"/>			29101	Marriott/70.101	Marriott Intl/Dept 70.101.01
Download Mailing Labels	<input checked="" type="checkbox"/>			33997	Vornado/2101	Vornado/Charles E Smith/2101
Export Data						
ReAssign Ac						
Generate M						
Assign Work						
Hide/Unhid						
Create Grou						
Group Assign						
Vertical Cla						
Classificati						
Master View						

Task

CREATE BULK TASKS: 5 Account(s) selected

Assign Tasks to:

OR...

Activity: Due On:

With:

Regarding:

☐ Recurring

Interval: #Occurrences:

Priority: Schedule For:

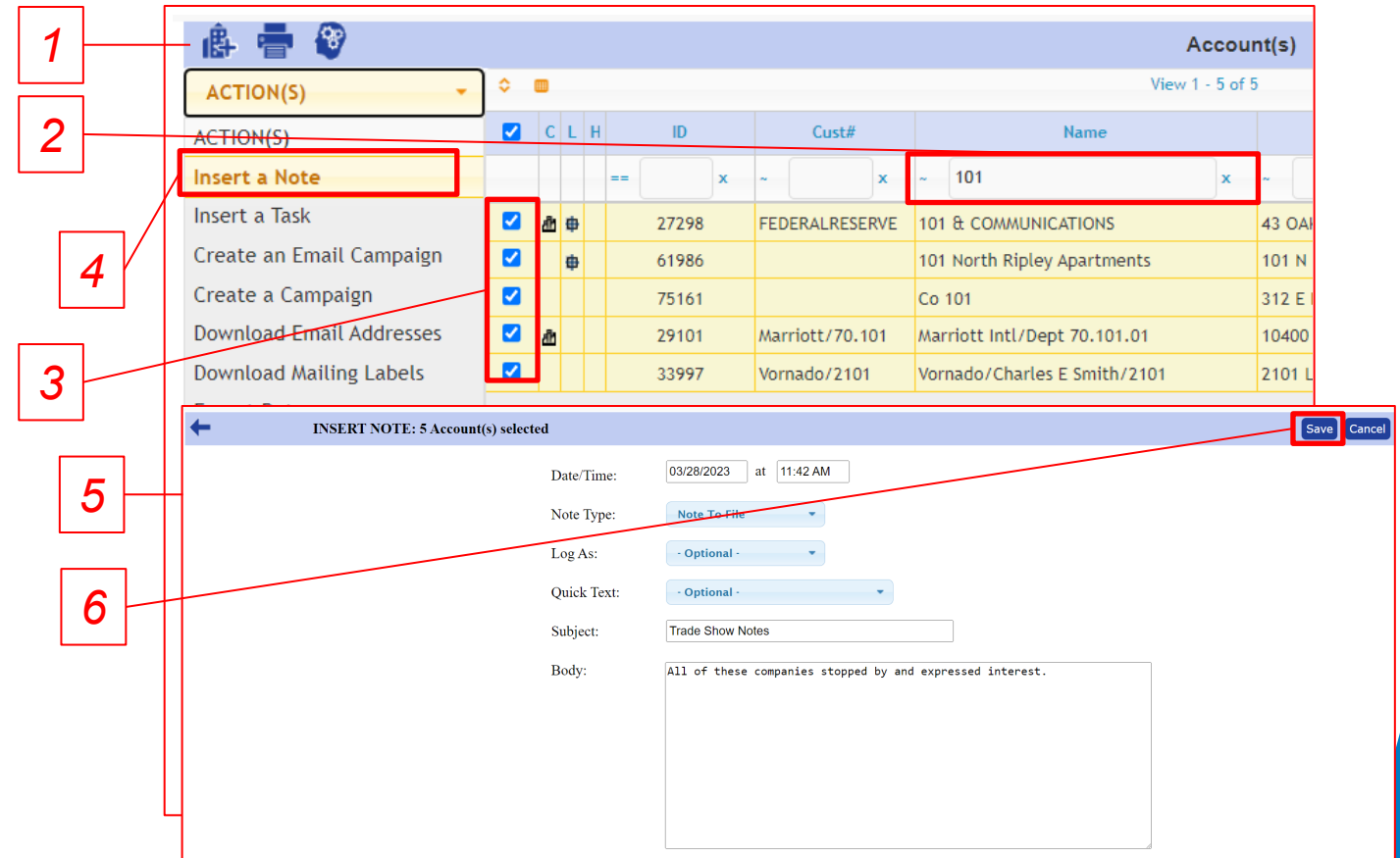
Instructions:

☐ Go to TaskAction after saving.

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



Account(s) View 1 - 5 of 5

ACTION(S)	✓	C	L	H	ID	Cust#	Name
Insert a Note	<input checked="" type="checkbox"/>				27298	FEDERALRESERVE	101 & COMMUNICATIONS
Insert a Task	<input checked="" type="checkbox"/>				61986		101 North Ripley Apartments
Create an Email Campaign	<input checked="" type="checkbox"/>				75161		Co 101
Create a Campaign	<input checked="" type="checkbox"/>				29101	Marriott/70.101	Marriott Intl/Dept 70.101.01
Download Email Addresses	<input checked="" type="checkbox"/>				33997	Vornado/2101	Vornado/Charles E Smith/2101
Download Mailing Labels	<input checked="" type="checkbox"/>						

INSERT NOTE: 5 Account(s) selected [Save] [Cancel]

Date/Time: 03/28/2023 at 11:42 AM

Note Type: **Note To File**

Log As: **Optional**

Quick Text: **Optional**

Subject: Trade Show Notes

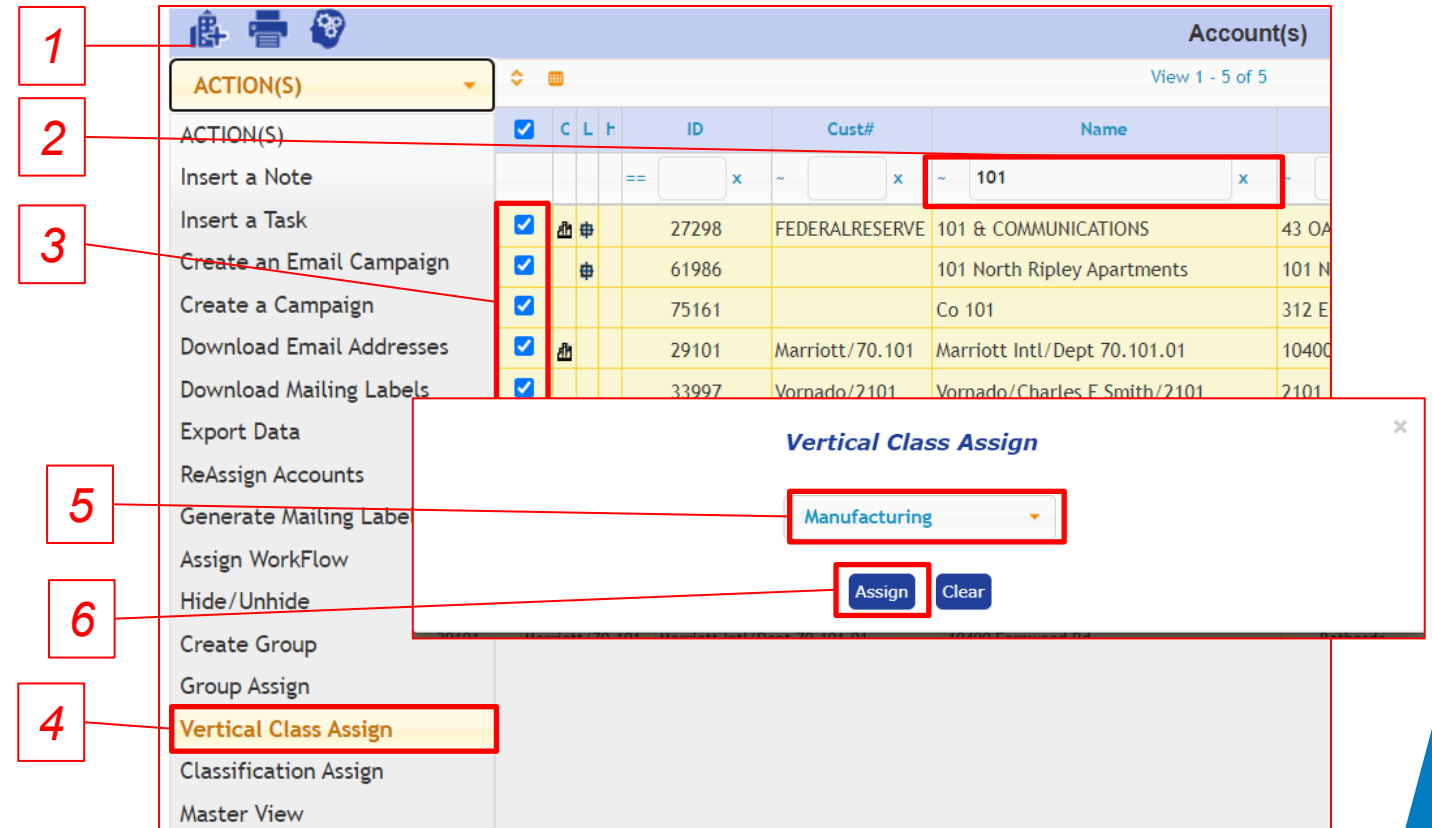
Body: All of these companies stopped by and expressed interest.

How To: Assign A Vertical Class to Accounts in Bulk

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

To assign vertical class in bulk:

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



The screenshot shows the Accounts desk interface. A table lists accounts with columns for ID, Cust#, and Name. Several accounts are selected with checkboxes. The 'Actions' dropdown menu is open, and 'Vertical Class Assign' is highlighted. A modal dialog titled 'Vertical Class Assign' is displayed, showing a dropdown menu with 'Manufacturing' selected and 'Assign' and 'Clear' buttons.

ID	Cust#	Name
27298	FEDERALRESERVE	101 & COMMUNICATIONS
61986		101 North Ripley Apartments
75161		Co 101
29101	Marriott/70.101	Marriott Intl/Dept 70.101.01
33997	Vornado/2101	Vornado/Charles F Smith/2101

Quick Tip:

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

How To: Reassign Accounts To A Different Rep in Bulk

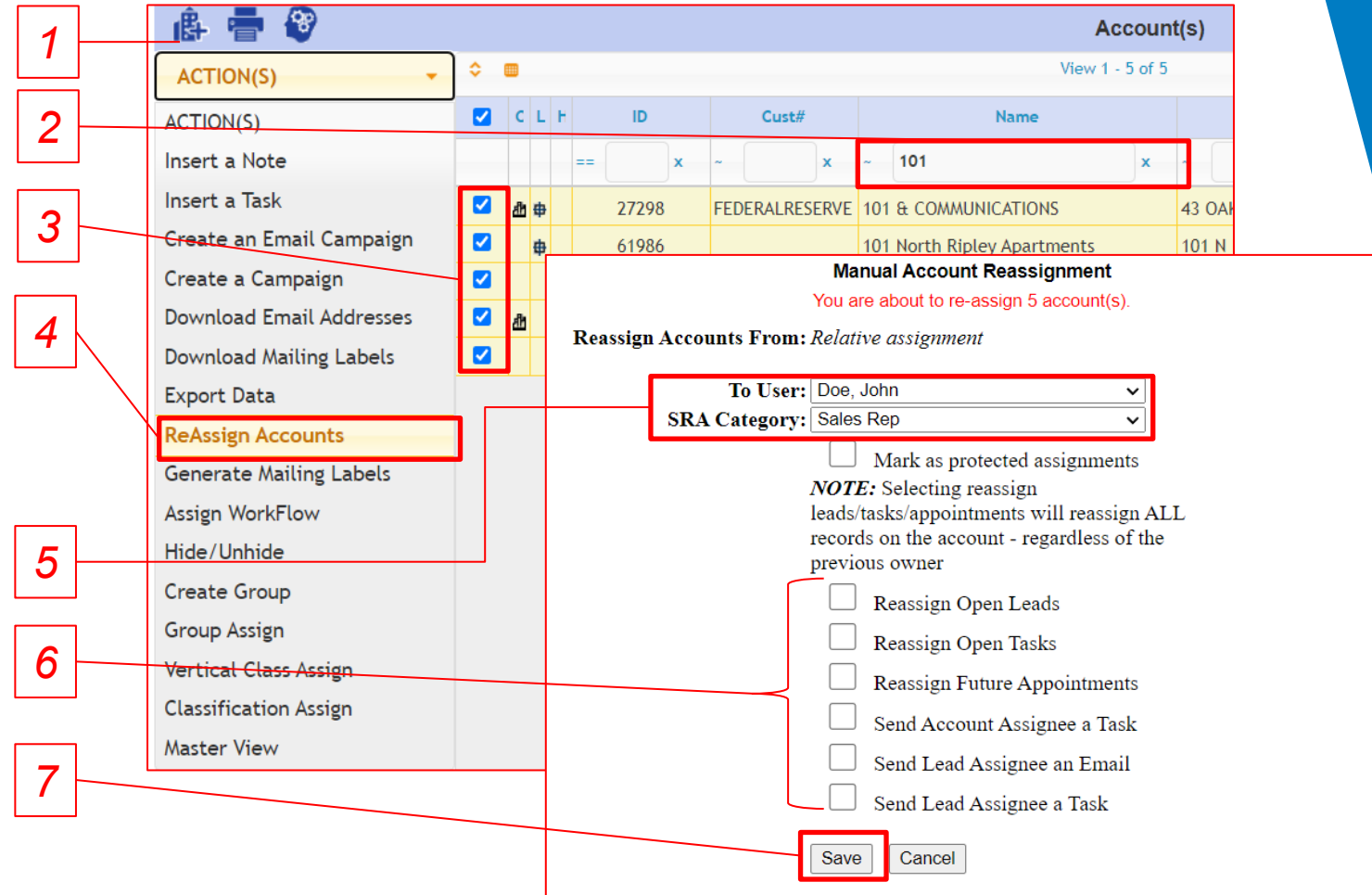
It is possible to assign many accounts to a different sales rep at once.

To assign accounts to a different rep in bulk:

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

Quick Tips:

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



Account(s) View 1 - 5 of 5

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

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

Reassign Accounts From: *Relative assignment*

To User: Doe, John
SRA Category: Sales Rep

☐ Mark as protected assignments

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

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

Save **Cancel**

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

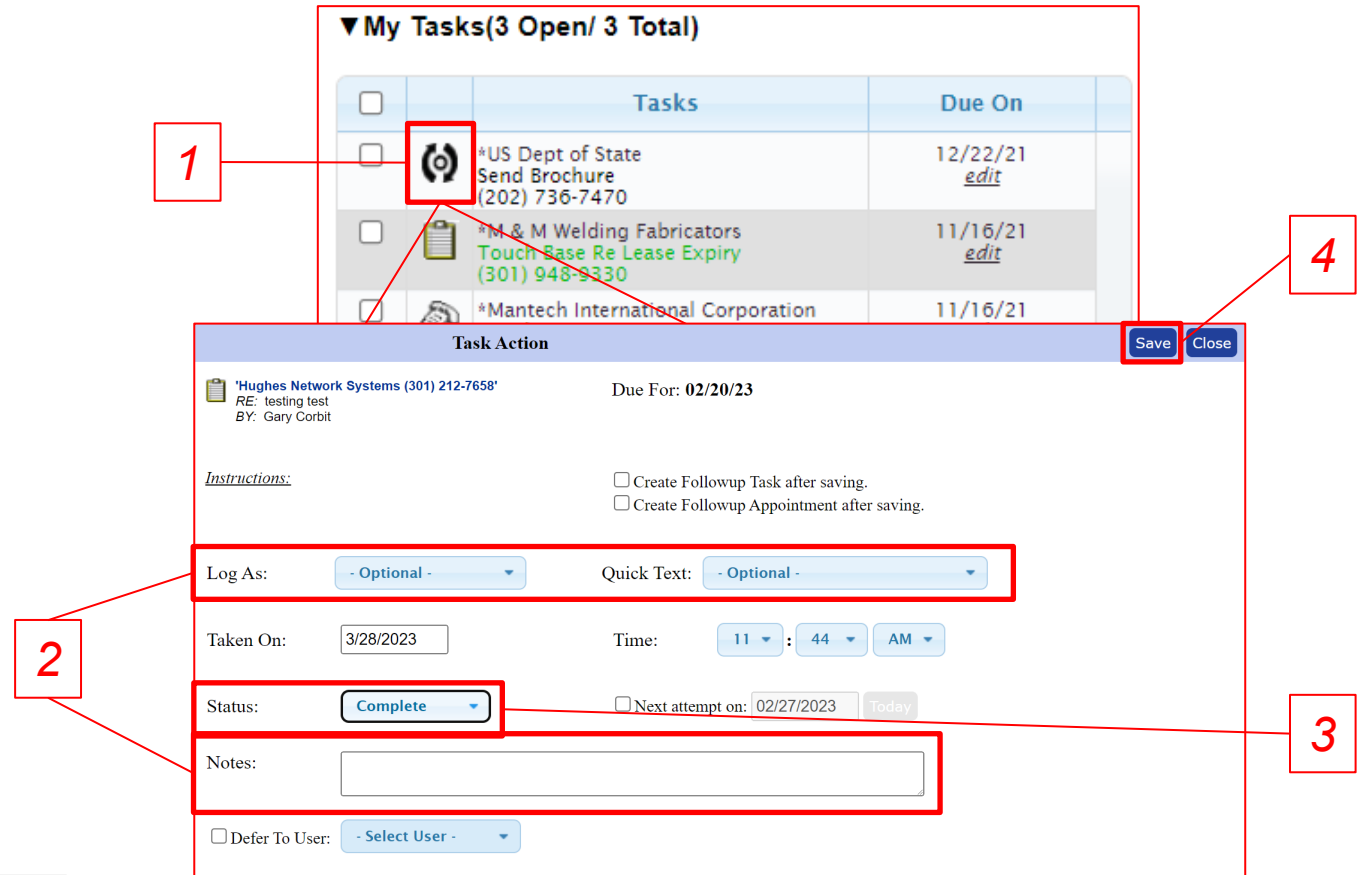
[View a tutorial Video Here](#)

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.



The screenshot shows the 'My Tasks' list and the 'Task Action' modal. Red boxes and numbers indicate the steps for completing a task:

- 1**: Points to the task icon (a camera) in the 'My Tasks' list.
- 2**: Points to the 'Log As' and 'Quick Text' drop-down menus in the 'Task Action' modal.
- 3**: Points to the 'Status' drop-down menu in the 'Task Action' modal.
- 4**: Points to the 'Save' button in the 'Task Action' modal.

The 'Task Action' modal contains the following fields and options:

- Task Information:** 'Hughes Network Systems (301) 212-7658', 'RE: testing test', 'BY: Gary Corbit', 'Due For: 02/20/23'.
- Instructions:**
 - ☐ Create Followup Task after saving.
 - ☐ Create Followup Appointment after saving.
- Log As:** - Optional -
- Quick Text:** - Optional -
- Taken On:** 3/28/2023
- Time:** 11 : 44 AM
- Status:** Complete
- Next attempt on:** 02/27/2023 Today
- Notes:** (Empty text box)
- Defer To User:** - Select User -

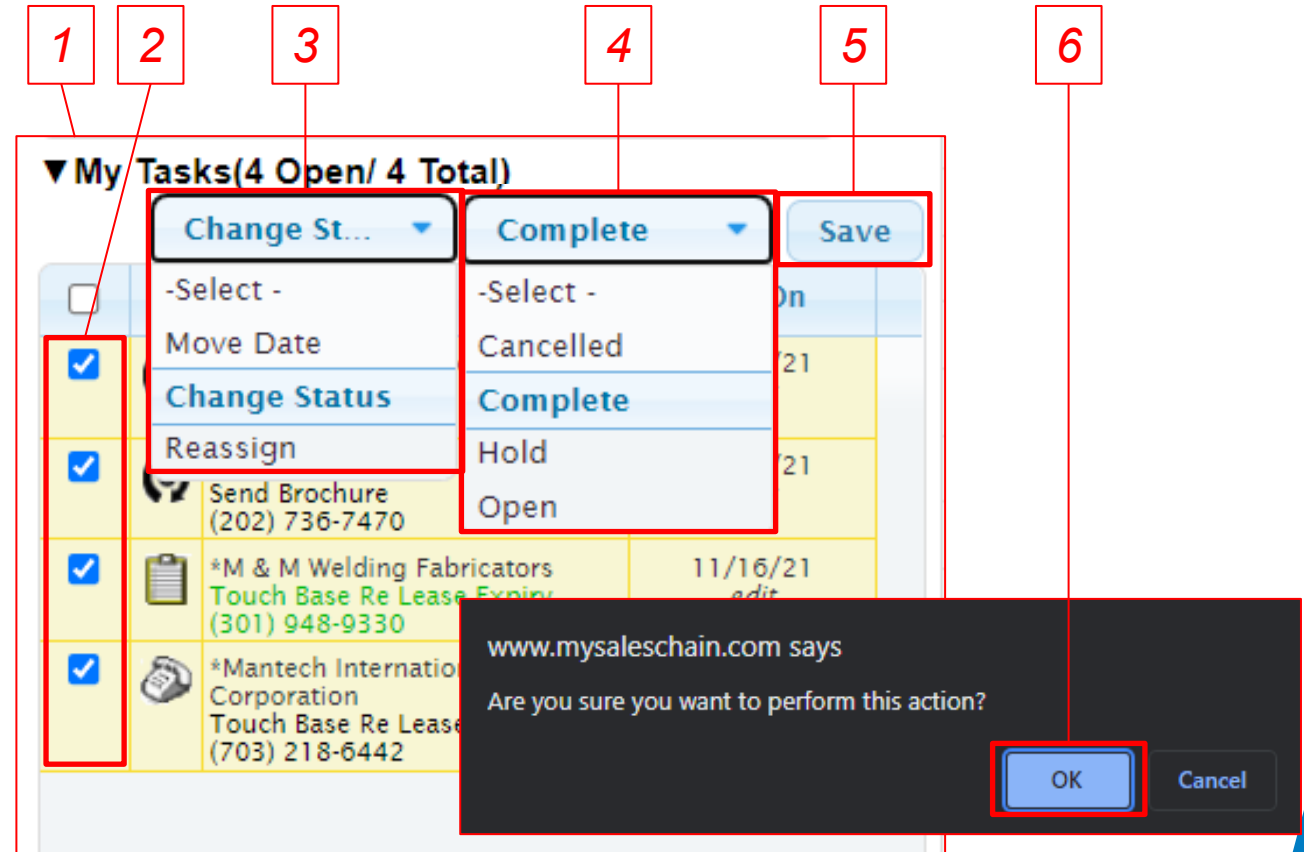
How To: Complete Tasks in Bulk

It is possible to complete many tasks at once.

[View a tutorial Video Here](#)

To complete tasks in bulk:

1. Navigate to the schedule desk
2. In the task sidebar (see page 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



The screenshot illustrates the process of completing tasks in bulk. It shows a sidebar with a list of tasks, each with a checkbox. A red box highlights the first four tasks, which are all checked. A red box labeled '1' points to the first task. A red box labeled '2' points to the first checkbox. A red box labeled '3' points to the first task's status dropdown menu, which is open and shows 'Change Status' selected. A red box labeled '4' points to the second task's status dropdown menu, which is also open and shows 'Complete' selected. A red box labeled '5' points to the 'Save' button. A red box labeled '6' points to the 'OK' button in a confirmation dialog box that appears at the bottom right. The dialog box contains the text 'www.mysaleschain.com says Are you sure you want to perform this action?' and has 'OK' and 'Cancel' buttons.

Quick Tip:

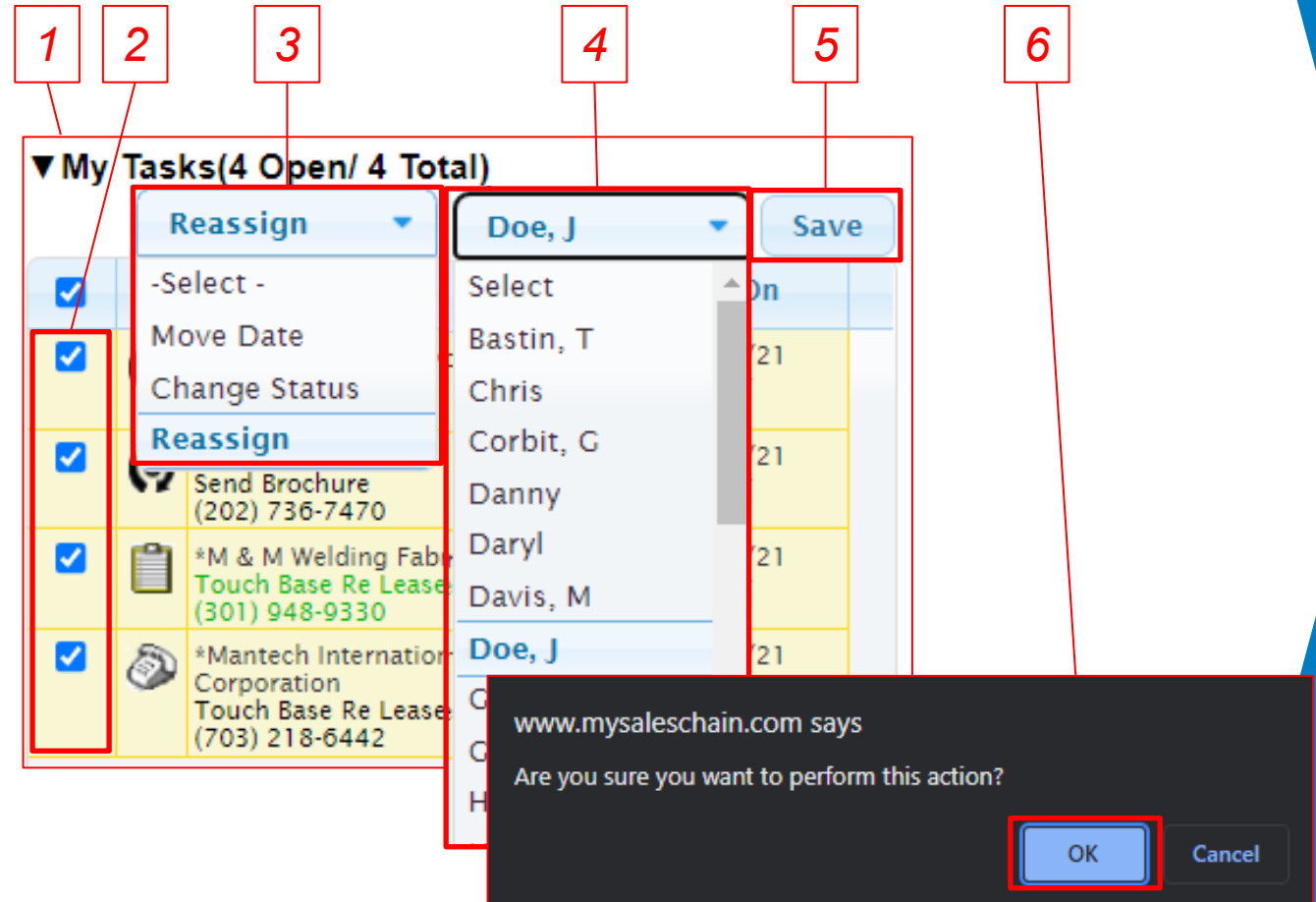
You can use this method to change the status of various tasks to *open*, *cancelled* or *hold* as well.

How To: Reassign Tasks in Bulk

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

To reassign tasks in bulk:

1. Navigate to the schedule desk
2. In the task sidebar (see page 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



▼ My Tasks(4 Open/ 4 Total)

1	2	3	4	5
<input checked="" type="checkbox"/>	Reassign	-Select -	Doe, J	Save
<input checked="" type="checkbox"/>	Move Date	Select	Bastin, T	21
<input checked="" type="checkbox"/>	Change Status	Chris	Corbit, G	21
<input checked="" type="checkbox"/>	Reassign	Danny	Daryl	21
<input checked="" type="checkbox"/>	Send Brochure (202) 736-7470	Davis, M	Doe, J	21
<input checked="" type="checkbox"/>	*M & M Welding Fab Touch Base Re Lease (301) 948-9330			
<input checked="" type="checkbox"/>	*Mantech International Corporation Touch Base Re Lease (703) 218-6442			

www.mysaleschain.com says
Are you sure you want to perform this action?

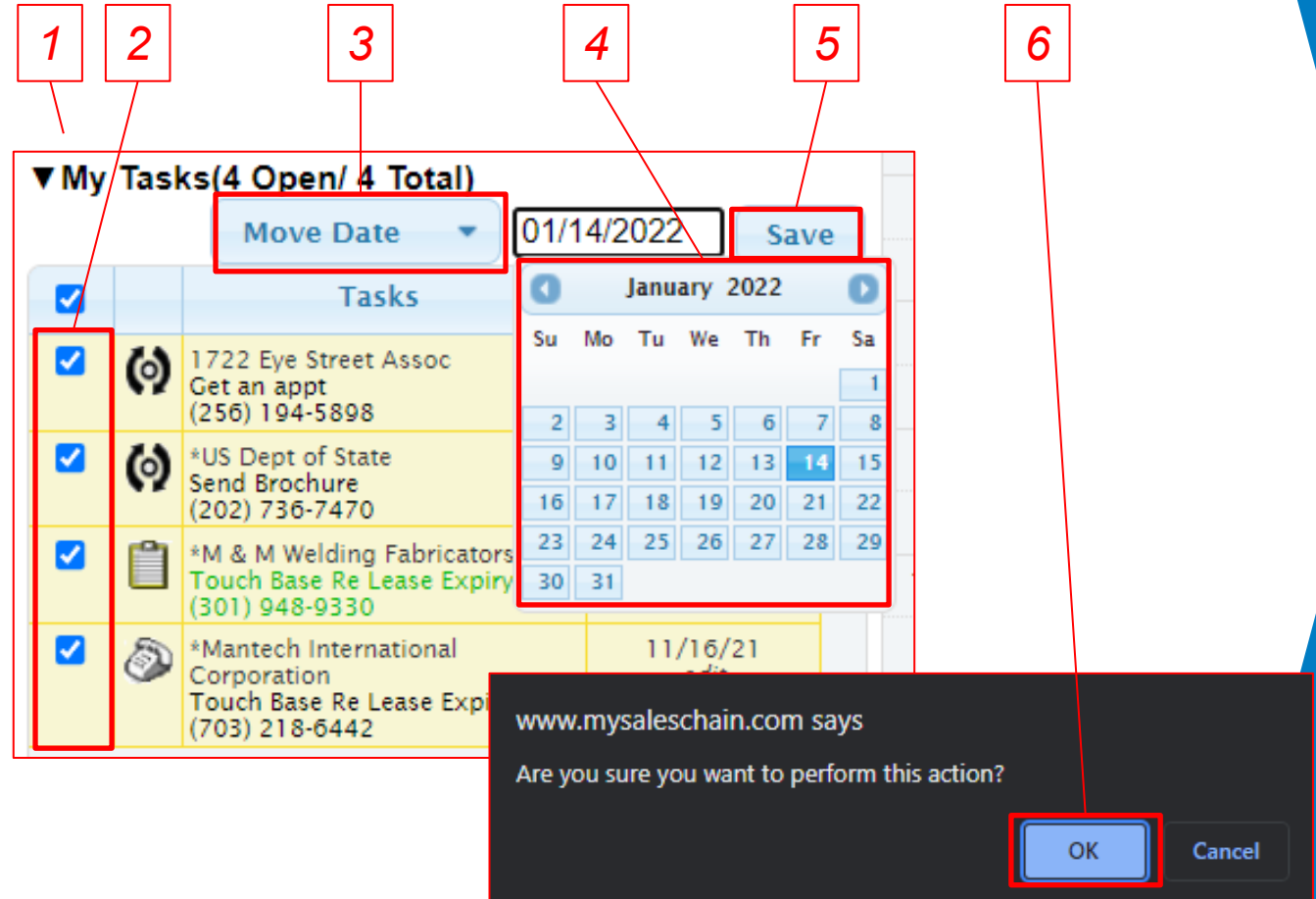
OK Cancel

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



The screenshot shows the 'My Tasks' section with 4 open tasks. The first three tasks are selected with checkboxes. The 'Move Date' dropdown is open, and the date '01/14/2022' is entered in the text box. The 'Save' button is highlighted. A confirmation dialog box is shown at the bottom right, asking 'Are you sure you want to perform this action?' with 'OK' and 'Cancel' buttons.

Task	Due Date
1722 Eye Street Assoc Get an appt (256) 194-5898	
*US Dept of State Send Brochure (202) 736-7470	
*M & M Welding Fabricators Touch Base Re Lease Expiry (301) 948-9330	11/16/21
*Mantech International Corporation Touch Base Re Lease Expiry (703) 218-6442	

January 2022

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

www.mysaleschain.com says
Are you sure you want to perform this action?

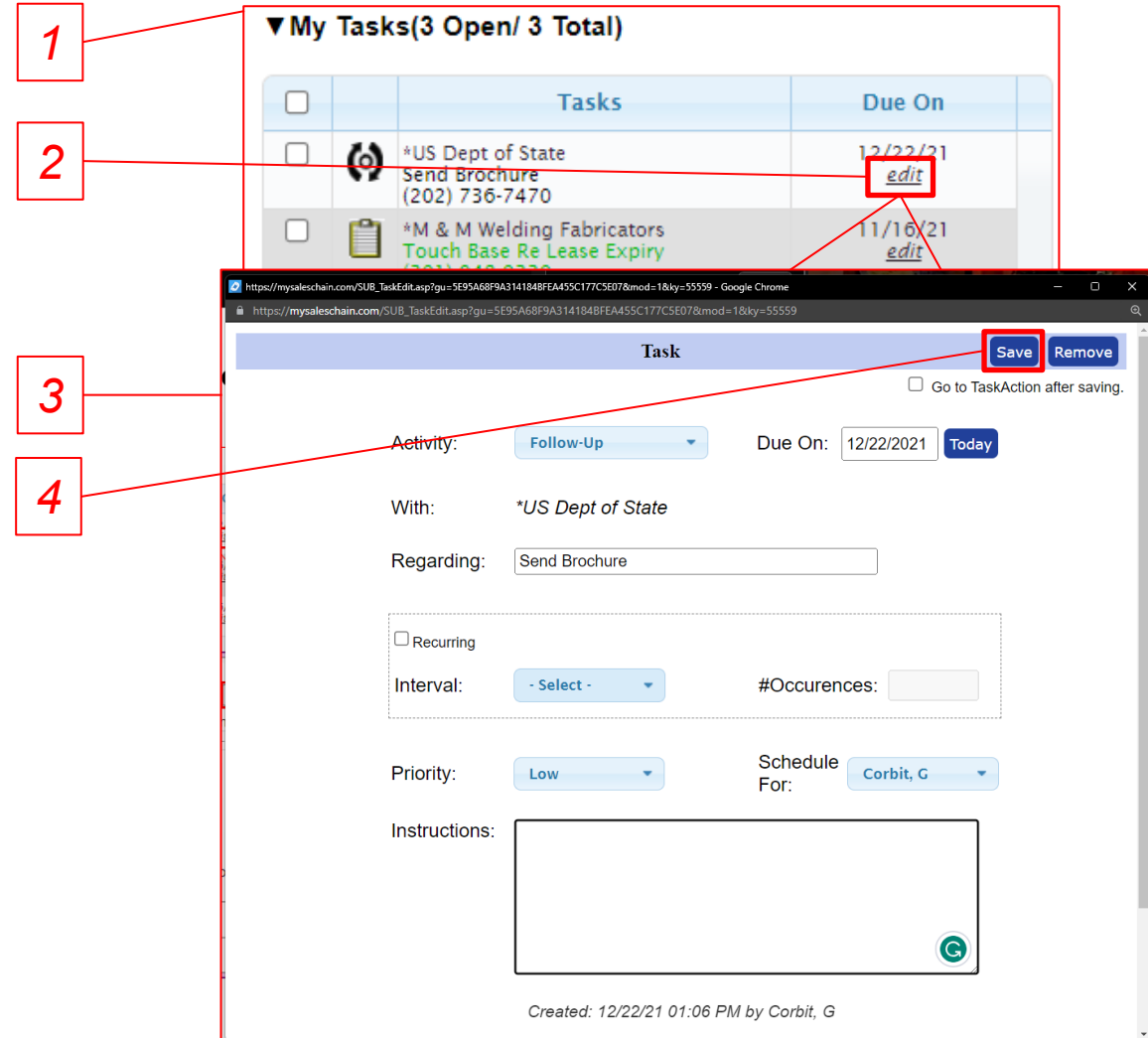
OK Cancel

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



1 ▼ My Tasks(3 Open/ 3 Total)

	Tasks	Due On
<input type="checkbox"/>	*US Dept of State Send Brochure (202) 736-7470	12/22/21 <i>edit</i>
<input type="checkbox"/>	*M & M Welding Fabricators Touch Base Re Lease Expiry	11/16/21 <i>edit</i>

2 *edit*

3 Task

Activity: Follow-Up Due On: 12/22/2021 Today

With: *US Dept of State

Regarding: Send Brochure

☐ Recurring

Interval: - Select - #Occurrences:

Priority: Low Schedule For: Corbit, G

Instructions:

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

4 Save Remove

Quick Tips:

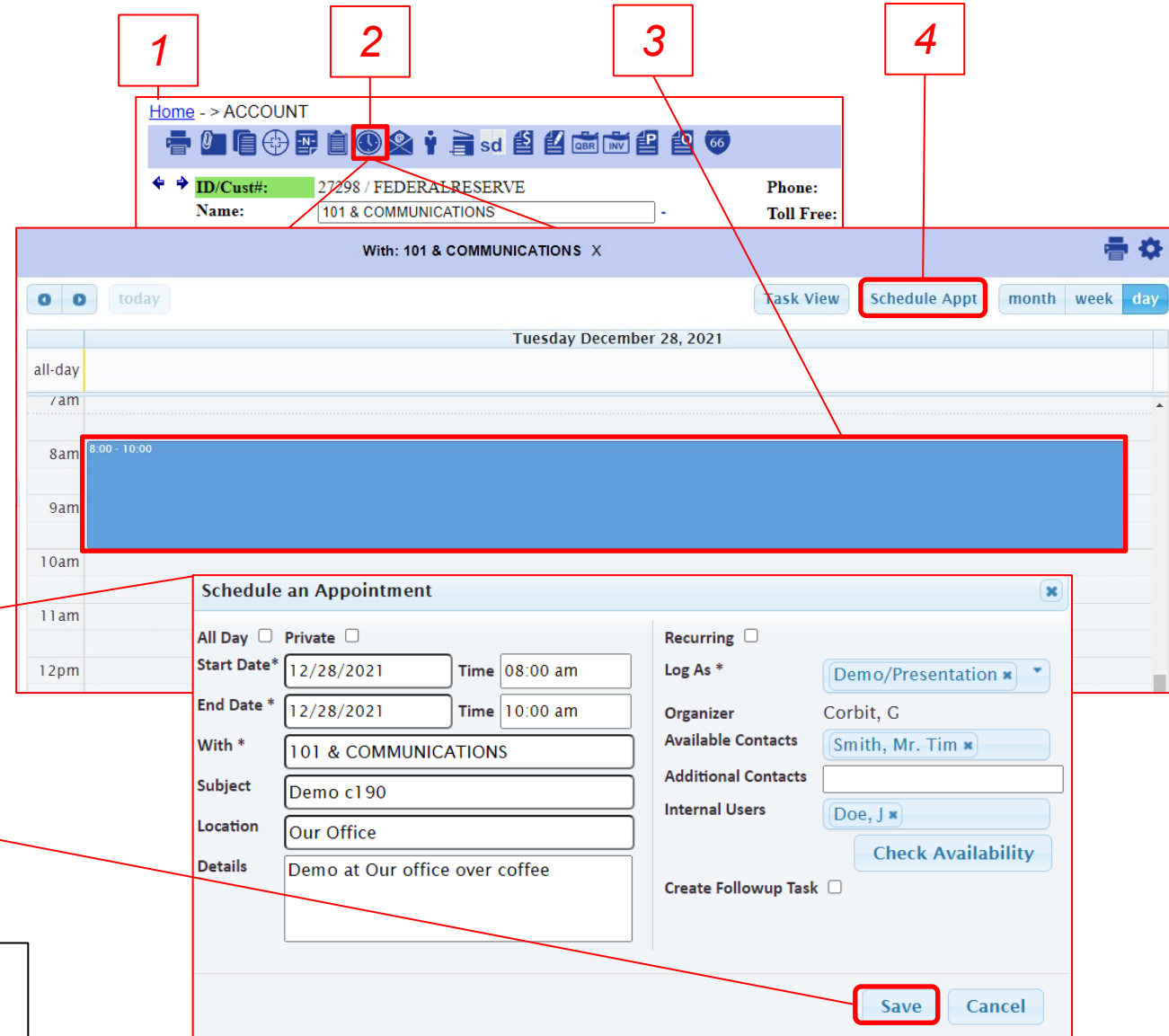
To reassign tasks in bulk, see page 62

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



The screenshot shows the 'ACCOUNT' view for '101 & COMMUNICATIONS'. The interface includes a top navigation bar with various icons. A red box labeled '1' highlights the account name. A red box labeled '2' highlights the 'new appointment' icon (a clock). A red box labeled '3' highlights the calendar view showing 'Tuesday December 28, 2021' with a time slot selected from 8:00 am to 10:00 am. A red box labeled '4' highlights the 'Schedule Appt' button. A red box labeled '5' highlights the 'Schedule an Appointment' form, which includes fields for 'Start Date', 'End Date', 'Time', 'With', 'Subject', 'Location', 'Details', 'Recurring', 'Log As', 'Organizer', 'Available Contacts', 'Additional Contacts', 'Internal Users', and 'Create Followup Task'. A red box labeled '6' highlights the 'Save' button at the bottom of the form.

Quick Tip:

If you're using Microsoft Outlook 365 Integration, This appointment will sync down into your outlook calendar. See pages 66 –69.



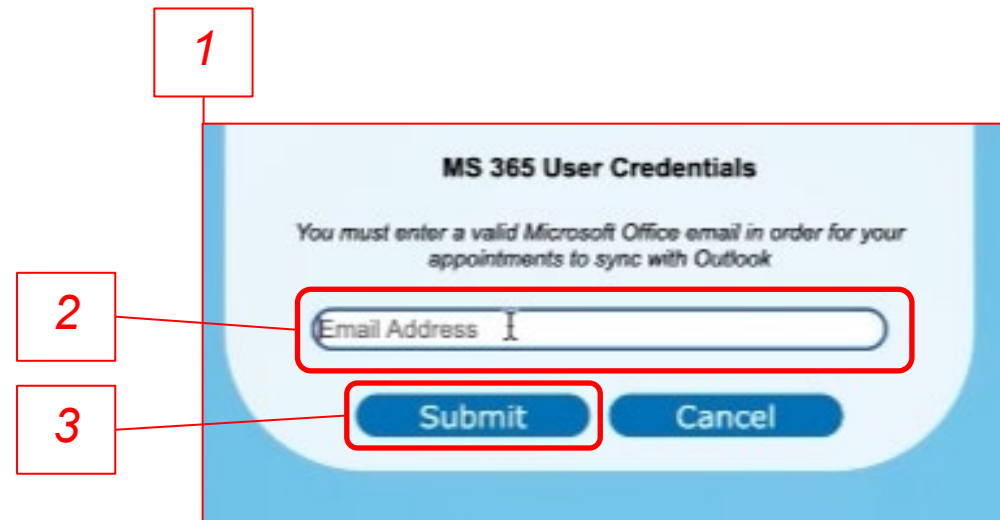
To begin syncing emails and appointments between SalesChain and Outlook 365, you will need to first enter your Outlook 365 credentials into SalesChain.

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*



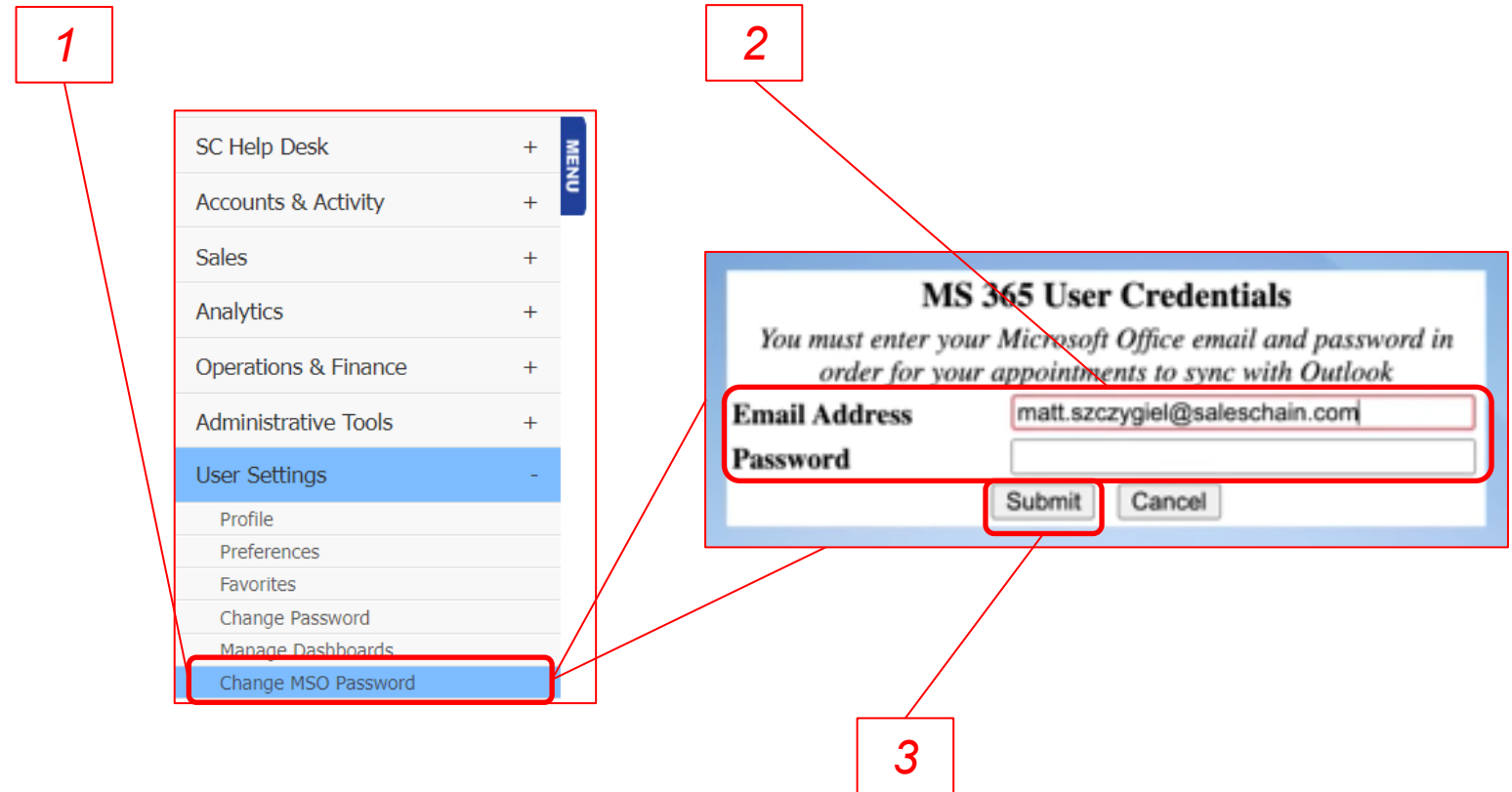
The screenshot shows a dialog box titled "MS 365 User Credentials". Below the title is the instruction: "You must enter a valid Microsoft Office email in order for your appointments to sync with Outlook". There are three numbered callouts: 1 points to the top of the dialog box, 2 points to the "Email Address" input field, and 3 points to the "Submit" button. The "Cancel" button is also visible to the right of the "Submit" button.

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

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



The screenshot illustrates the steps to change an Outlook 365 password in SalesChain. It is divided into two main sections: a left-hand menu and a right-hand form.

Section 1: User Settings Menu

A vertical menu on the left contains the following items: SC Help Desk, Accounts & Activity, Sales, Analytics, Operations & Finance, Administrative Tools, User Settings (highlighted in blue), Profile, Preferences, Favorites, Change Password, Manage Dashboards, and Change MSO Password (highlighted in blue). A red box labeled '1' points to the 'Change MSO Password' option.

Section 2: MS 365 User Credentials Form

A form titled 'MS 365 User Credentials' is shown on the right. It contains the following fields and elements:

- Email Address:** A text field containing 'matt.szczygiel@saleschain.com'.
- Password:** A text field for entering the new password.
- Submit:** A button to submit the credentials.
- Cancel:** A button to cancel the operation.

Red boxes and callouts are used to highlight specific elements:

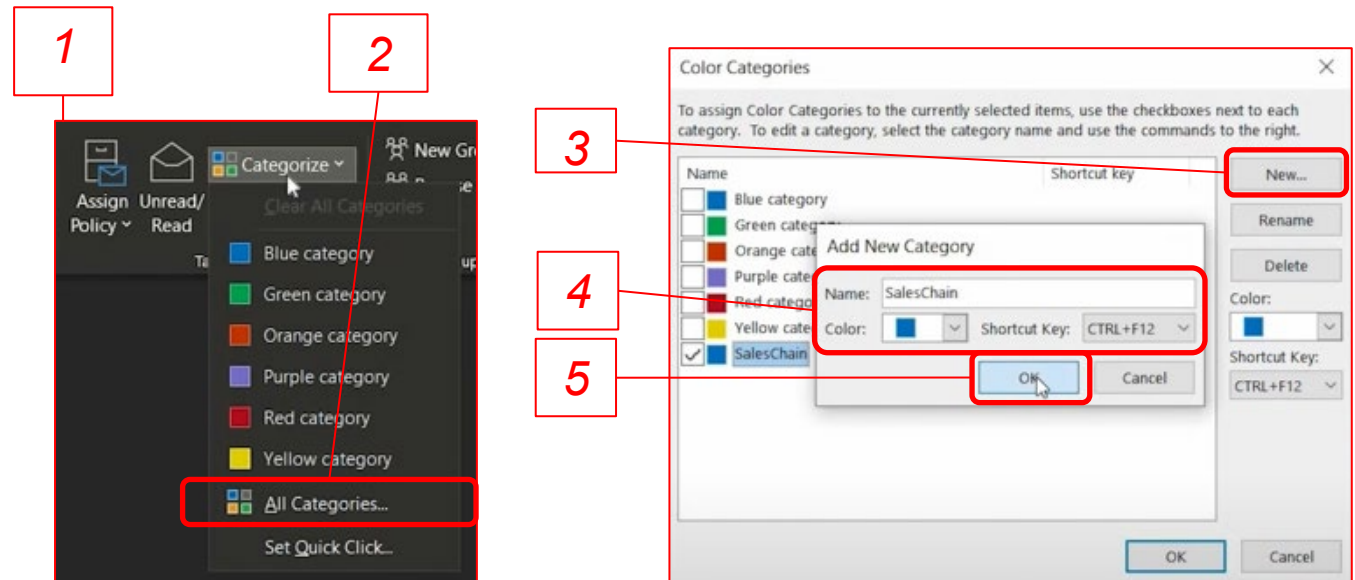
- A red box labeled '2' points to the 'Email Address' field.
- A red box labeled '3' points to the 'Submit' button.

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.

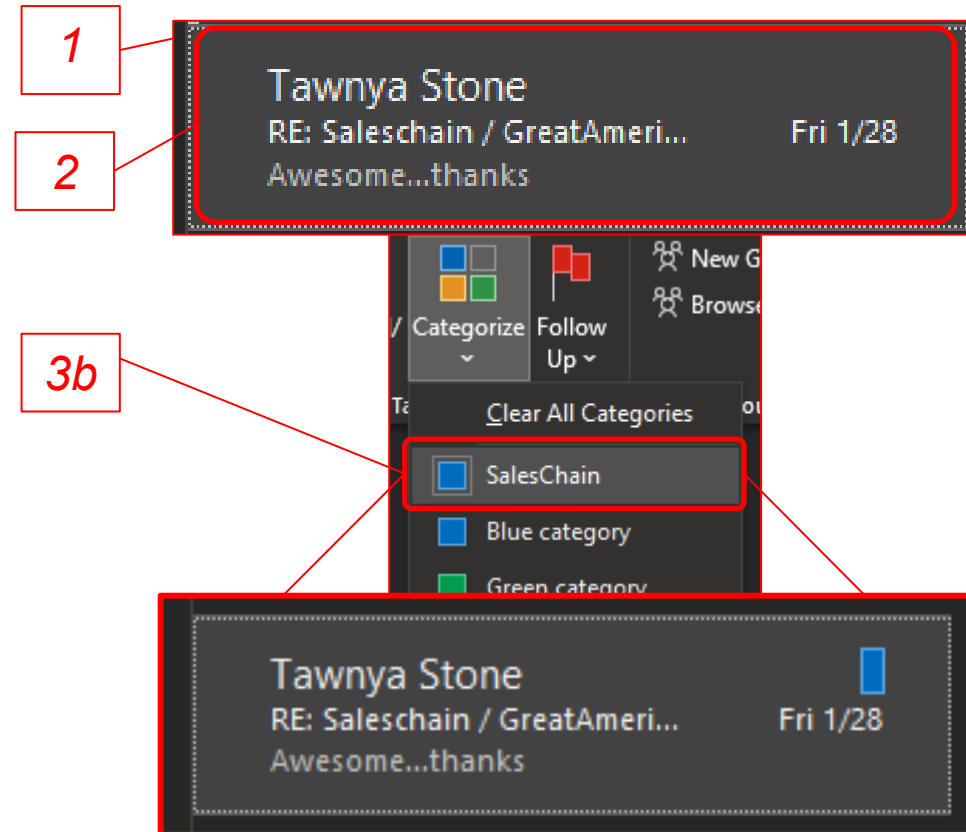
Not all Outlook emails are automatically pushed into the SalesChain system. You can choose which to push by marking them with a category in Outlook. When you do, they will automatically be associated with an account, with a contact within that account, and will be logged in your user activity.

[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 ****



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

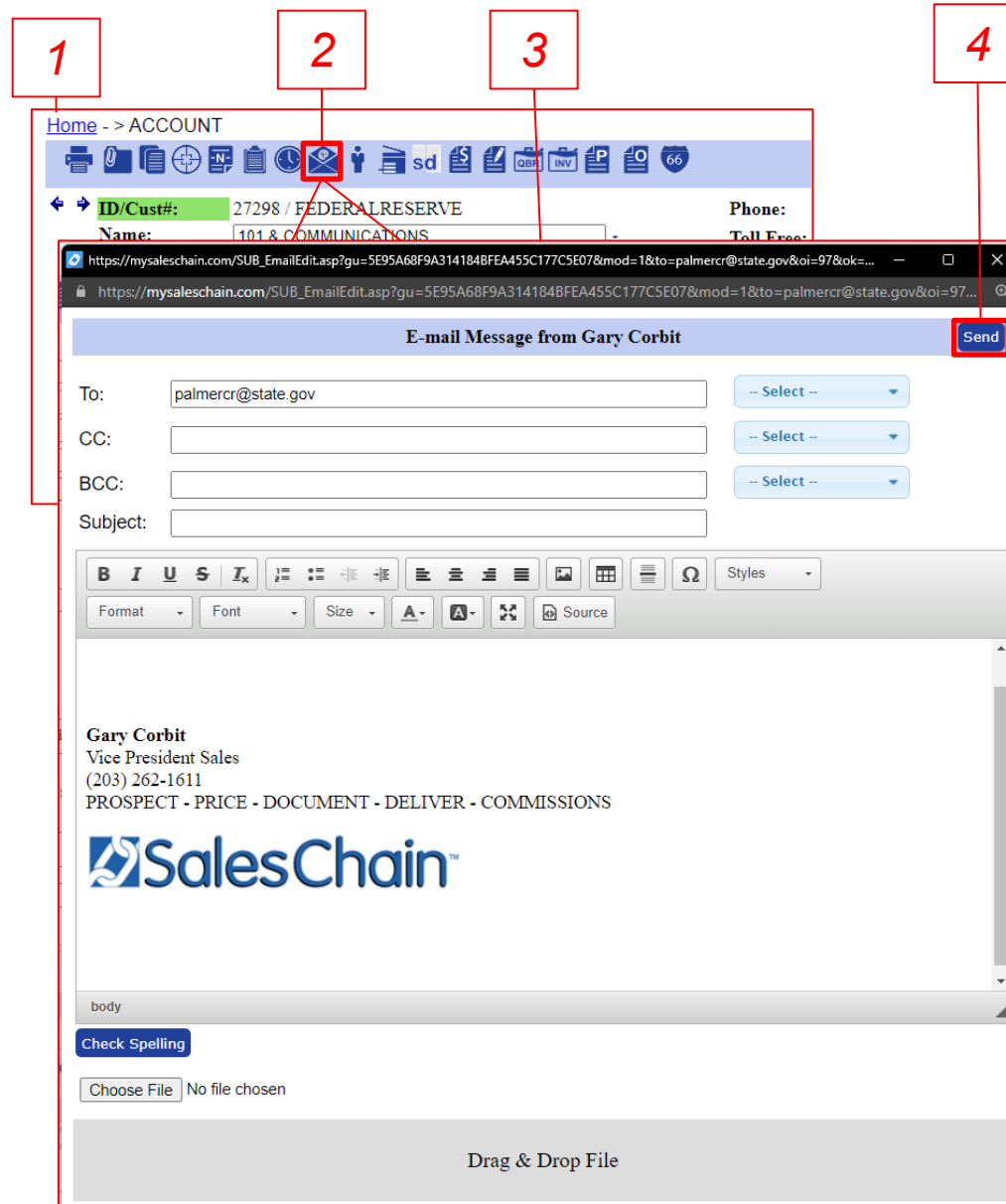
To send an email from SalesChain:

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).

How To: Send an Email From the Account View



The screenshot shows the 'ACCOUNT' view for ID/Cust# 27298 / FEDERALRESERVE. The interface includes a toolbar with various icons, a 'new email' icon (envelope) highlighted with a red box and number 2, and a 'Send' button highlighted with a red box and number 4. The email composition area shows fields for To, CC, BCC, and Subject, with dropdown menus for selecting recipients. The email body contains the name 'Gary Corbit', title 'Vice President Sales', phone number '(203) 262-1611', and a list of services: PROSPECT - PRICE - DOCUMENT - DELIVER - COMMISSIONS. The SalesChain logo is also visible.

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](#))

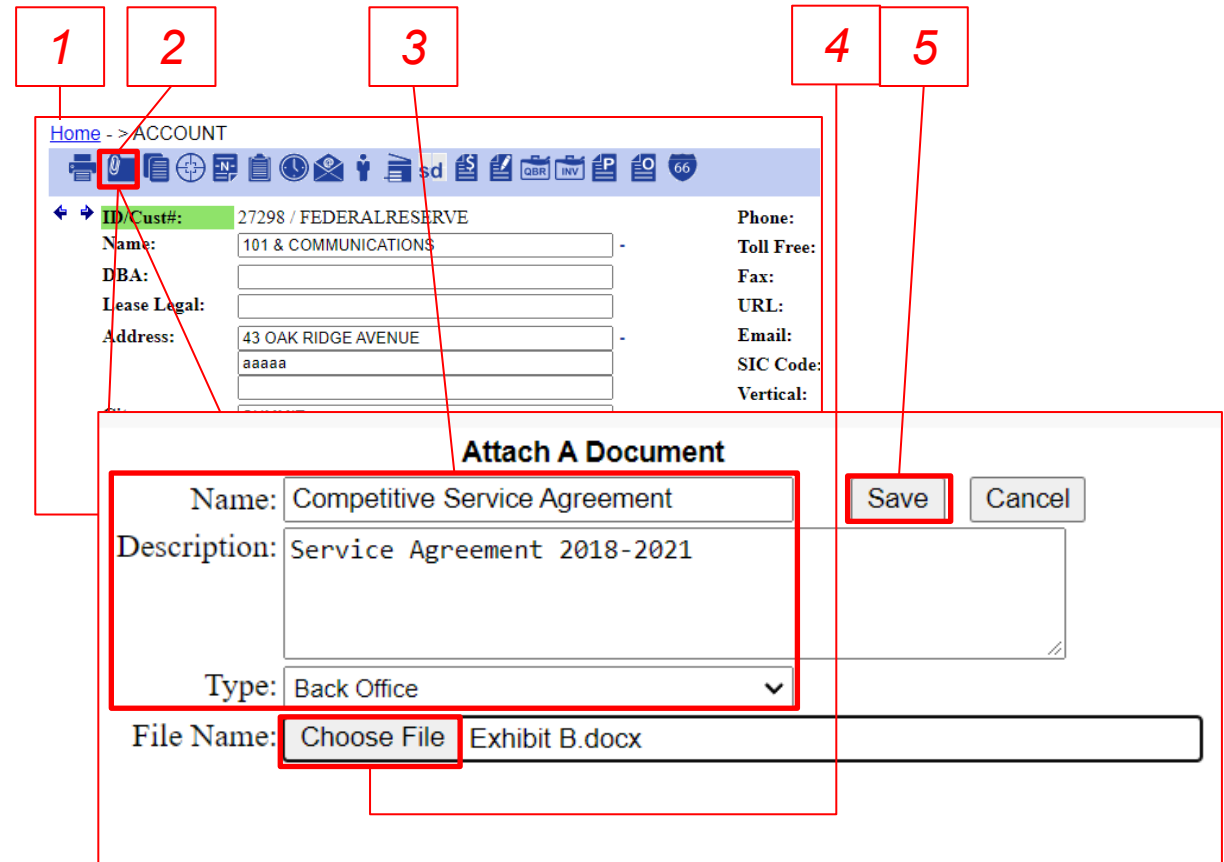
Email Request Log				
1 - 100 of 1832 - Next		Show : 100	Refresh	
ID	SUMMARY	CREATED	- All Status -	
6099	Document Signed Sender: support@saleschain.com Recipient: salesdemo@saleschain.com	12/16/2021 3:58 PM	Sent	
6100	Signed Copy of Esign Document Package Sender: support@saleschain.com Recipient: 01234matthew@gmail.com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

How To: Attach a File to An Account

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

To attach a file to an account:

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



Home -> ACCOUNT

ID/Cust#: 27298 / FEDERALRESERVE

Name: 101 & COMMUNICATIONS

DBA:

Lease Legal:

Address: 43 OAK RIDGE AVENUE

aaaaa

Phone:

Toll Free:

Fax:

URL:

Email:

SIC Code:

Vertical:

Attach A Document

Name: Competitive Service Agreement


Description: Service Agreement 2018-2021


Type: Back Office

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

Save **Cancel**

Quick Tips:


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

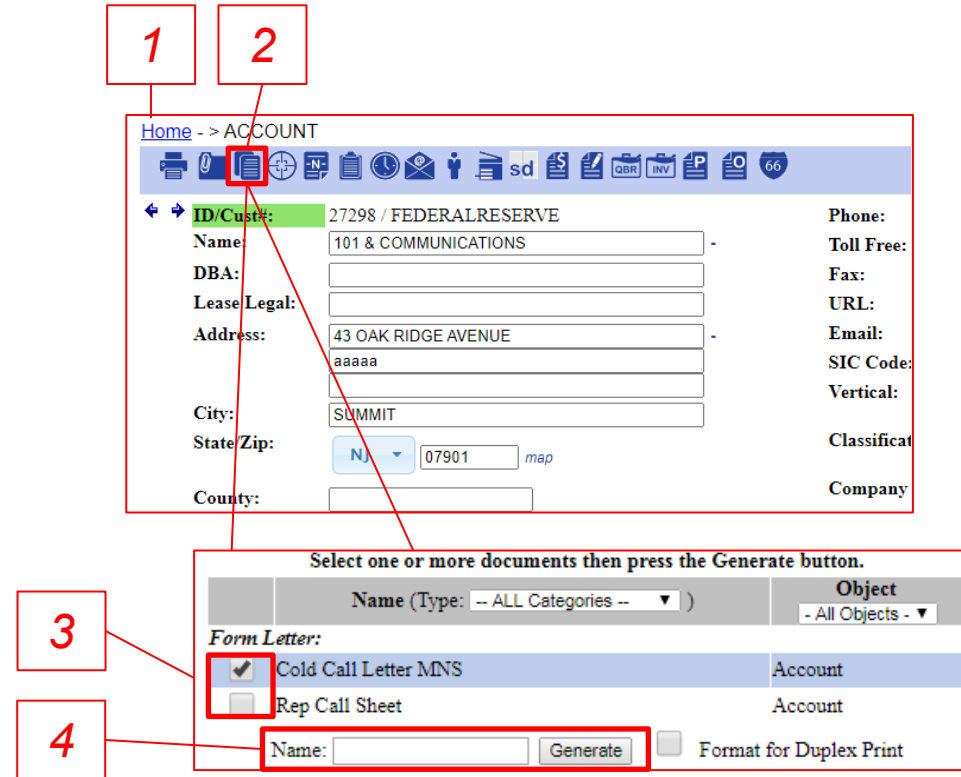
Activity Summary			
TYPE	OBJECT	ON-DATE	ACTIVITY
	Account	12/28/2021 5:24PM	File: Competitive Service Agreement Description: Service Agreement 2018-2021

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*



Home - > ACCOUNT

ID/Cust#: 27298 / FEDERALRESERVE

Name: 101 & COMMUNICATIONS

DBA:

Lease Legal:

Address: 43 OAK RIDGE AVENUE

City: SUMMIT

State/Zip: NJ 07901

County:

Phone:

Toll Free:

Fax:

URL:

Email:

SIC Code:

Vertical:

Classificat

Company

Select one or more documents then press the Generate button.

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


Form Letter:


☒ Cold Call Letter MNS Account

☐ Rep Call Sheet Account

Name: Generate Format for Duplex Print

Quick Tips:


- This is an archived method. We officially recommend that you generate most documents, including all order related and delivery documents, from the proposal and order system. (See Page 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.

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

How To: Add a Competitive Equipment Record

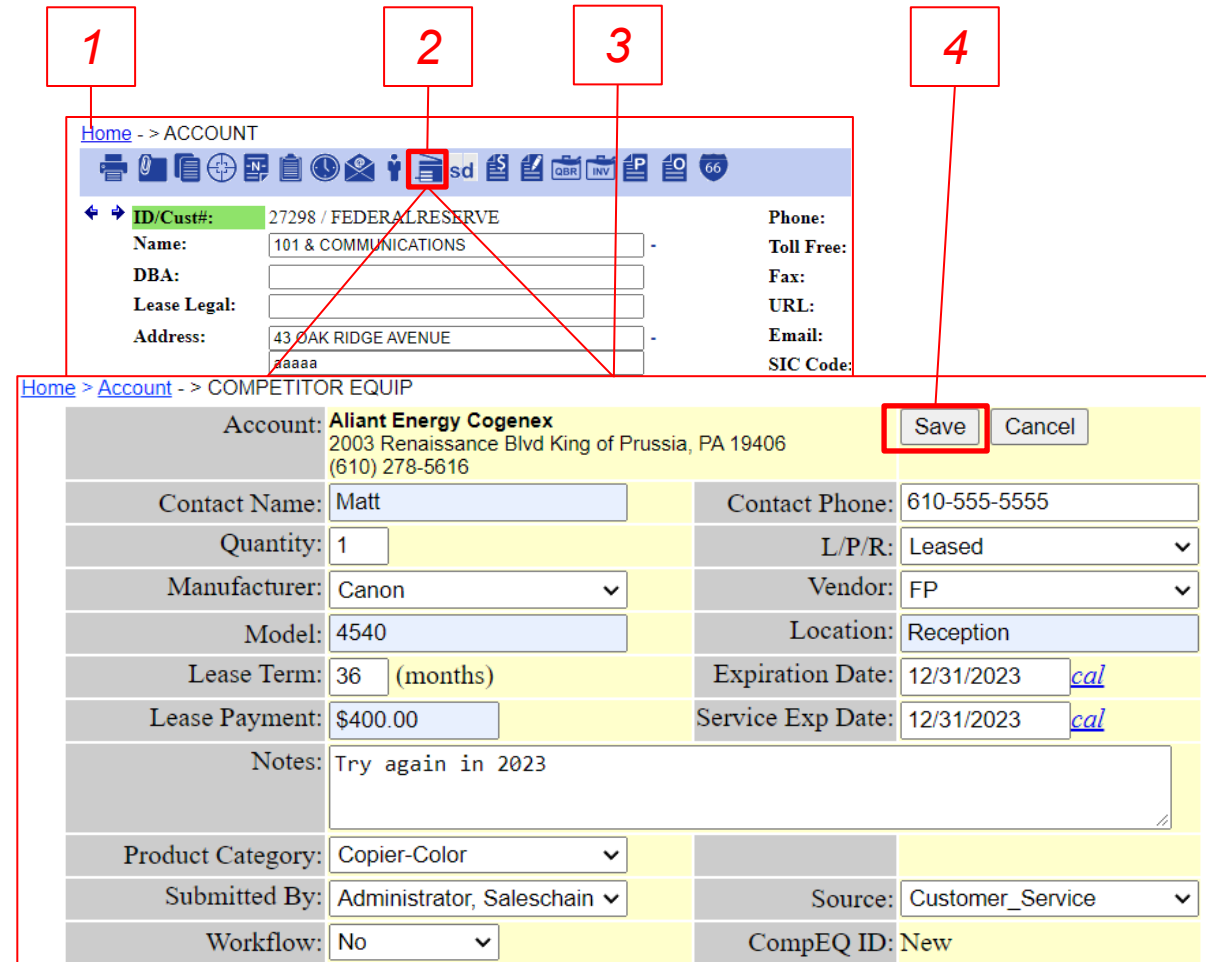
Competitive equipment records can be created from the account view to track competitive leases and help you target competitor's accounts.

To add a competitive equipment record to an account:

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

Quick Tip:

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



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

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

4

Deal Pricing:

Pricing, Documenting, Delivering and
Funding Processes Within
SalesChain


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

**See [page 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

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



Name: **101 & COMMUNICATIONS** [\(Account\)](#)

Address: **43 OAK RIDGE AVENUE**
aaaaa
SUMMIT, NJ 07901 [map](#)

Phone / Fax: (203) 262-1611 /

Lead ID# 4518

Instructions: **Wants to print his own brochures**

Date Created: **Corbit, G**

Source: **Other**

Submitted By: **Gary Corbit 12/29/2021**

Classification: **Net-New Placement**

Sales Rep: **Gary Corbit**

Status: **New** [update](#)

Expected Delivery:

Last Modified:

Original Submitter: **Gary Corbit 12/29/2021**

InPlace Vendor: **The Local Copy Guys**

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

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

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

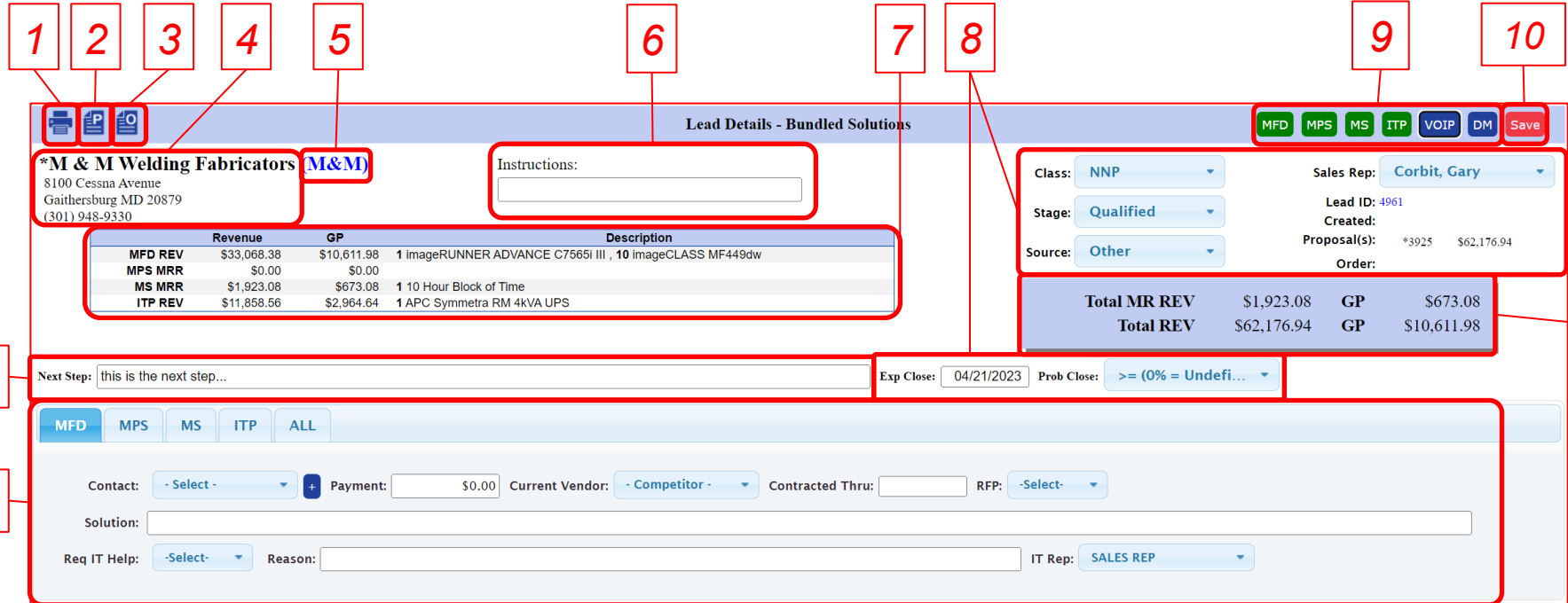
Next Step:

Quick Note: [zoom](#) Save

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



Lead Details - Bundled Solutions

*M & M Welding Fabricators **M&M**
 8100 Cessna Avenue
 Gaithersburg MD 20879
 (301) 948-9330

Instructions:

	Revenue	GP	Description
MFD REV	\$33,068.38	\$10,611.98	1 imageRUNNER ADVANCE C7565i III , 10 imageCLASS MF449dw
MPS MRR	\$0.00	\$0.00	
MS MRR	\$1,923.08	\$673.08	1 10 Hour Block of Time
ITP REV	\$11,858.56	\$2,964.64	1 APC Symmetra RM 4kVA UPS

Class: **NNP** Sales Rep: **Corbit, Gary**
 Stage: **Qualified** Lead ID: **4961**
 Source: **Other** Created: ***3925** \$62,176.94
 Order:

Total MR REV \$1,923.08 **GP** \$673.08
Total REV \$62,176.94 **GP** \$10,611.98

Next Step: this is the next step... Exp Close: 04/21/2023 Prob Close: >= (0% = Undefi...)

MFD MPS MS ITP ALL
















Contact: - Select - Payment: \$0.00 Current Vendor: - Competitor - Contracted Thru: RFP: - Select -

Solution:

Req IT Help: - Select - Reason: IT Rep: SALES REP

Quick Tip:


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

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)

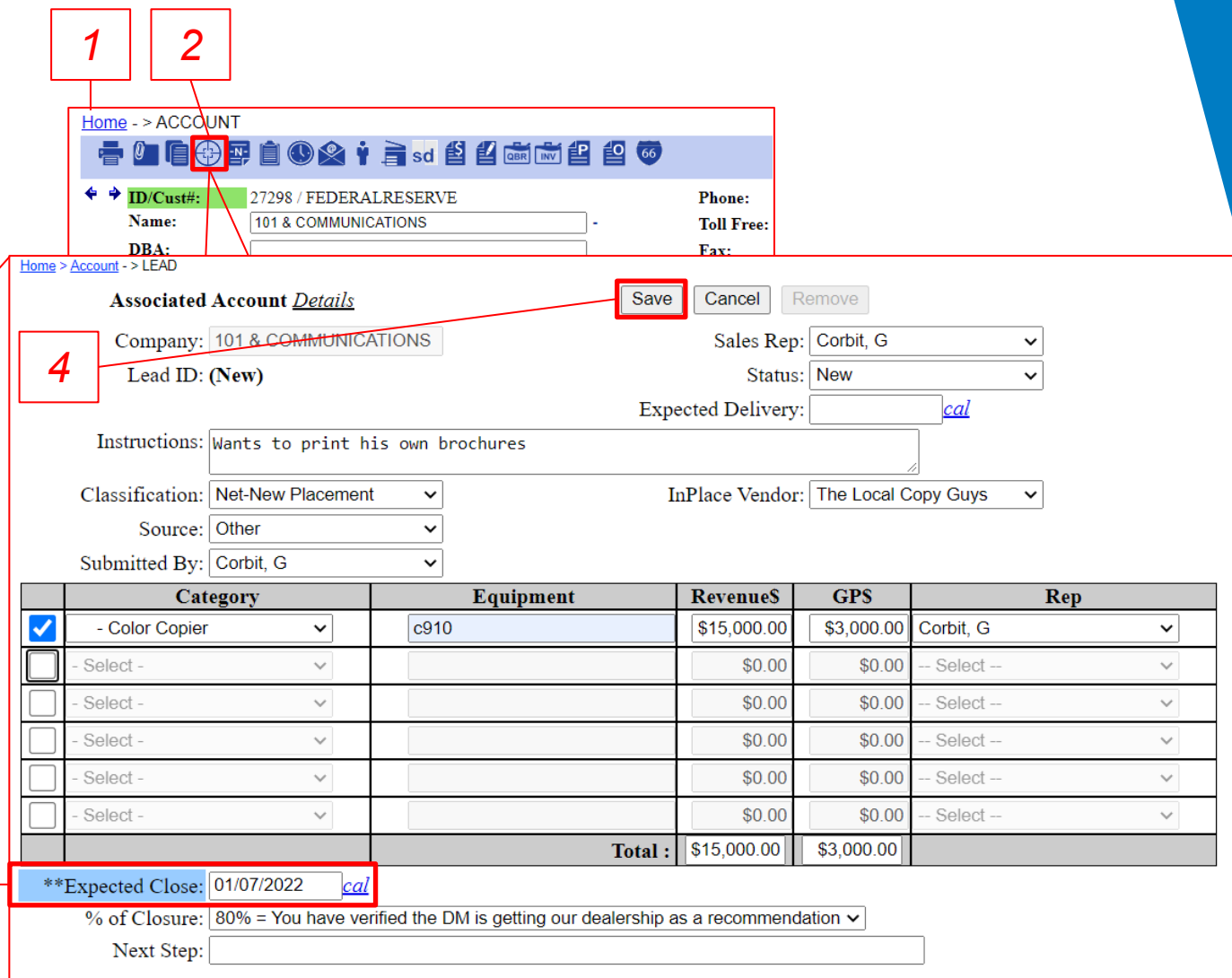
It is possible to manually create new leads from the account view.

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.



Home -> ACCOUNT

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

Home > Account -> LEAD

Associated Account Details Save Cancel Remove

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


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

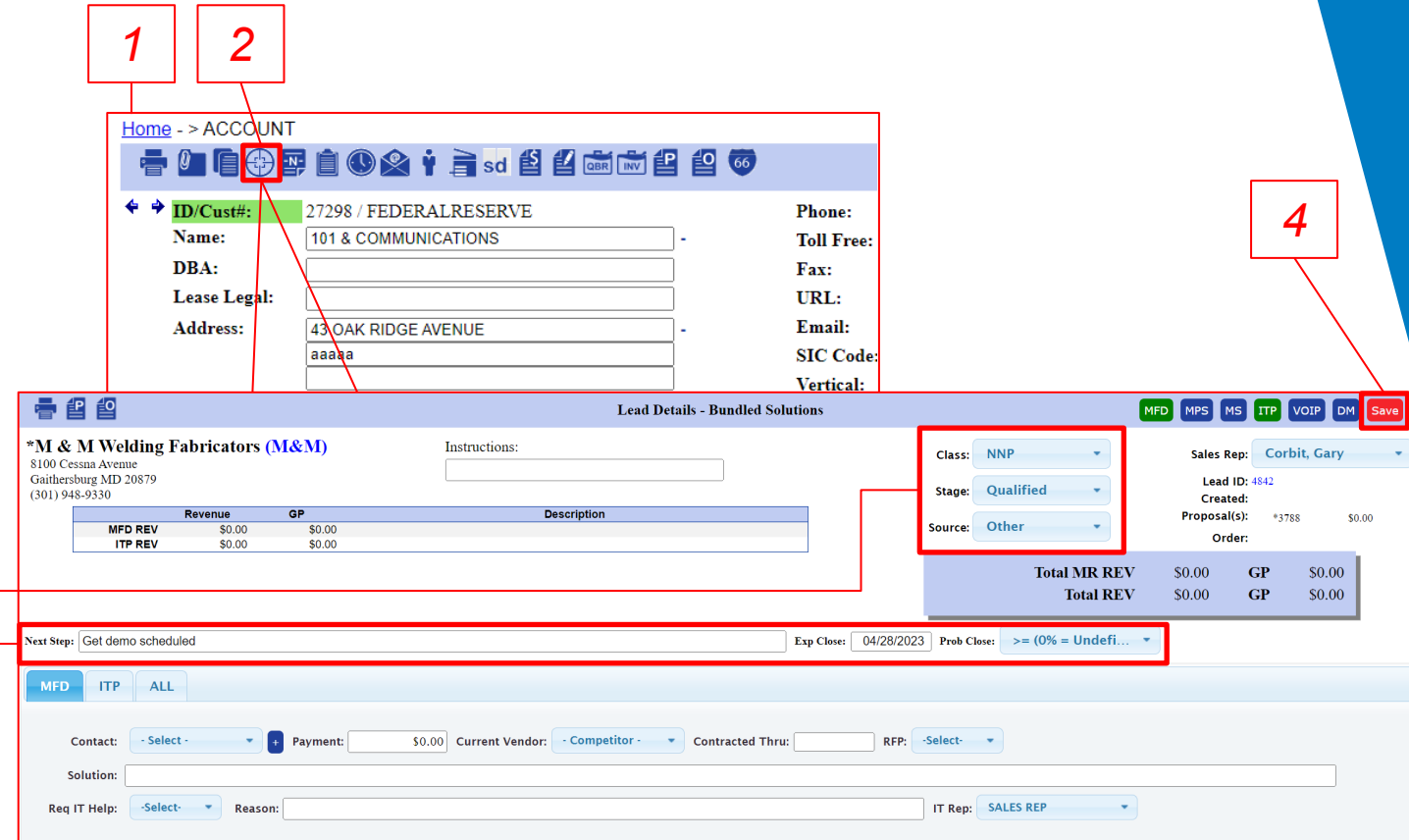
****Expected Close:** 01/07/2022
% of Closure: 80% = You have verified the DM is getting our dealership as a recommendation
Next Step:

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



Home - > ACCOUNT

ID/Cust#: 27298 / FEDERALRESERVE

Name: 101 & COMMUNICATIONS

DBA:

Lease Legal:

Address: 43 OAK RIDGE AVENUE

Phone:

Toll Free:

Fax:

URL:

Email:

SIC Code:

Vertical:

Lead Details - Bundled Solutions

*M & M Welding Fabricators (M&M)

8100 Cessna Avenue
Gaithersburg MD 20879
(301) 948-9330

Instructions:

	Revenue	GP	Description
MFD REV	\$0.00	\$0.00	
ITP REV	\$0.00	\$0.00	

Class: NNP

Stage: Qualified

Source: Other

Sales Rep: Corbit, Gary

Lead ID: 4842

Created:

Proposal(s): *3788 \$0.00

Order:

Total MR REV \$0.00 GP \$0.00

Total REV \$0.00 GP \$0.00

Next Step: Get demo scheduled

Exp Close: 04/28/2023

Prob Close: >= (0% = Undefi...

MFD ITP ALL

Contact: - Select -

Payment: \$0.00

Current Vendor: - Competitor -

Contracted Thru:

RFP: - Select -

Solution:

Req IT Help: - Select -

Reason:

IT Rep: SALES REP


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.

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.

1

2

Home > Account -> LEAD

Name: 101 & COMMUNICATIONS (Account)

Address: 43 OAK RIDGE AVENUE

3

Home > Account -> LEAD

Associated Account *Details*

Company: 101 & COMMUNICATIONS

Lead ID: (New)

Sales Rep: Corbit, G

Status: New

Expected Delivery: cal

Instructions: Wants to print his own brochures

Classification: Net-New Placement

InPlace Vendor: The Local Copy Guys

Source: Other

Submitted By: Corbit, G

Save Cancel Remove

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

**Expected Close: 01/07/2022 cal

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

Next Step:

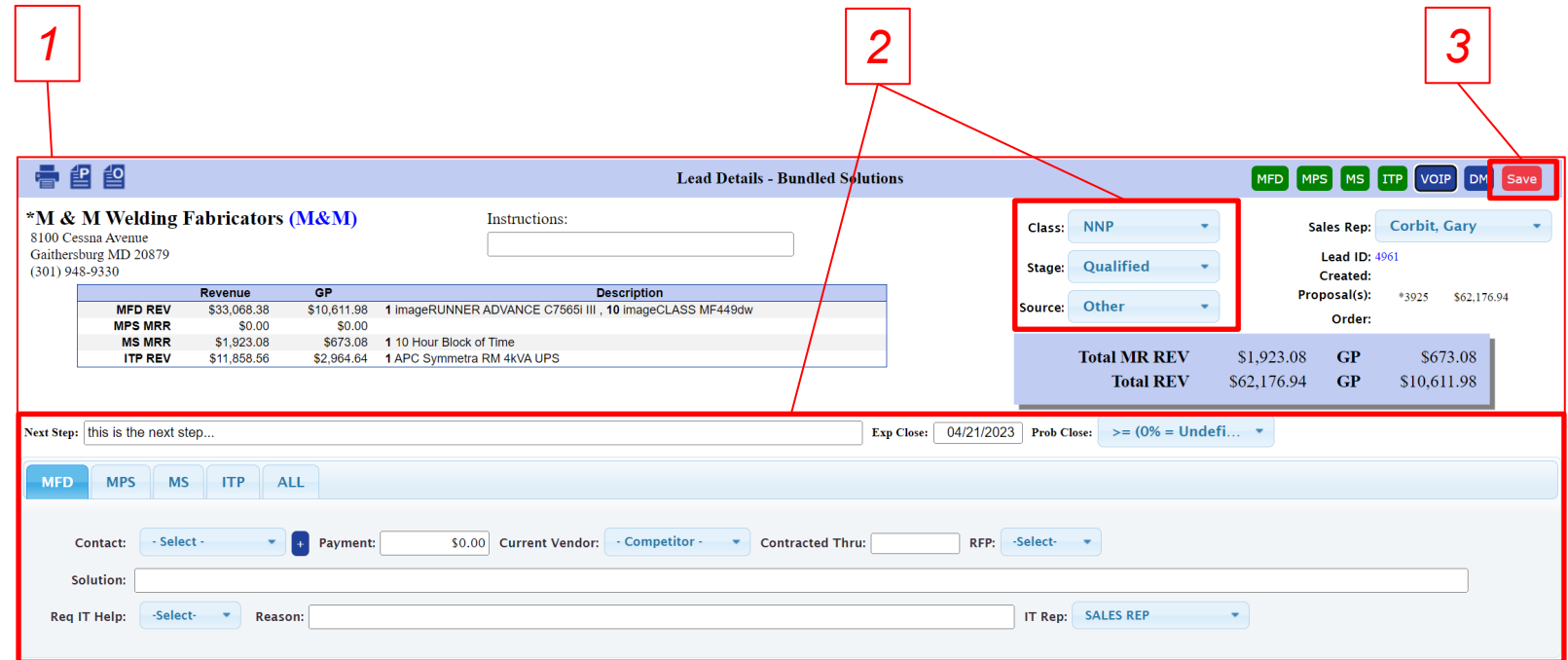
4

How To: 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



The screenshot shows the 'Lead Details - Bundled Solutions' page for a lead named '*M & M Welding Fabricators (M&M)'. The page is divided into several sections:

- Top Bar:** Contains navigation icons (Print, PDF, CSV) and a 'Save' button (highlighted with a red box and callout 3).
- Lead Information:** Displays the lead name, address, phone number, and a 'Instructions' field.
- Forecasting Table:** A table with columns for Revenue, GP, and Description. It includes rows for MFD REV, MPS MRR, MS MRR, and ITP REV, with corresponding financial values and descriptions of bundled solutions.
- Class, Stage, and Source:** A section with dropdown menus for 'Class' (set to NNP), 'Stage' (set to Qualified), and 'Source' (set to Other). This section is highlighted with a red box and callout 2.
- Sales Rep and Lead ID:** Displays the sales representative (Corbit, Gary) and the lead ID (4961).
- Created and Proposal(s):** Shows the creation date and a list of proposals with their respective values.
- Order:** A section for order details.
- Summary:** A table showing 'Total MR REV', 'Total REV', 'GP', and 'GP' values.
- Next Step:** A field for the next step in the sales process.
- Exp Close and Prob Close:** Fields for expected and probable close dates.
- Navigation Tabs:** Tabs for MFD, MPS, MS, ITP, and ALL.
- Contact and Payment:** Fields for contact selection, payment amount, current vendor, and contracted through date.
- Solution:** A field for the solution being offered.
- Req IT Help and Reason:** Fields for requesting IT help and the reason for the request.
- IT Rep:** A dropdown menu for the IT representative.


Quick Tip:

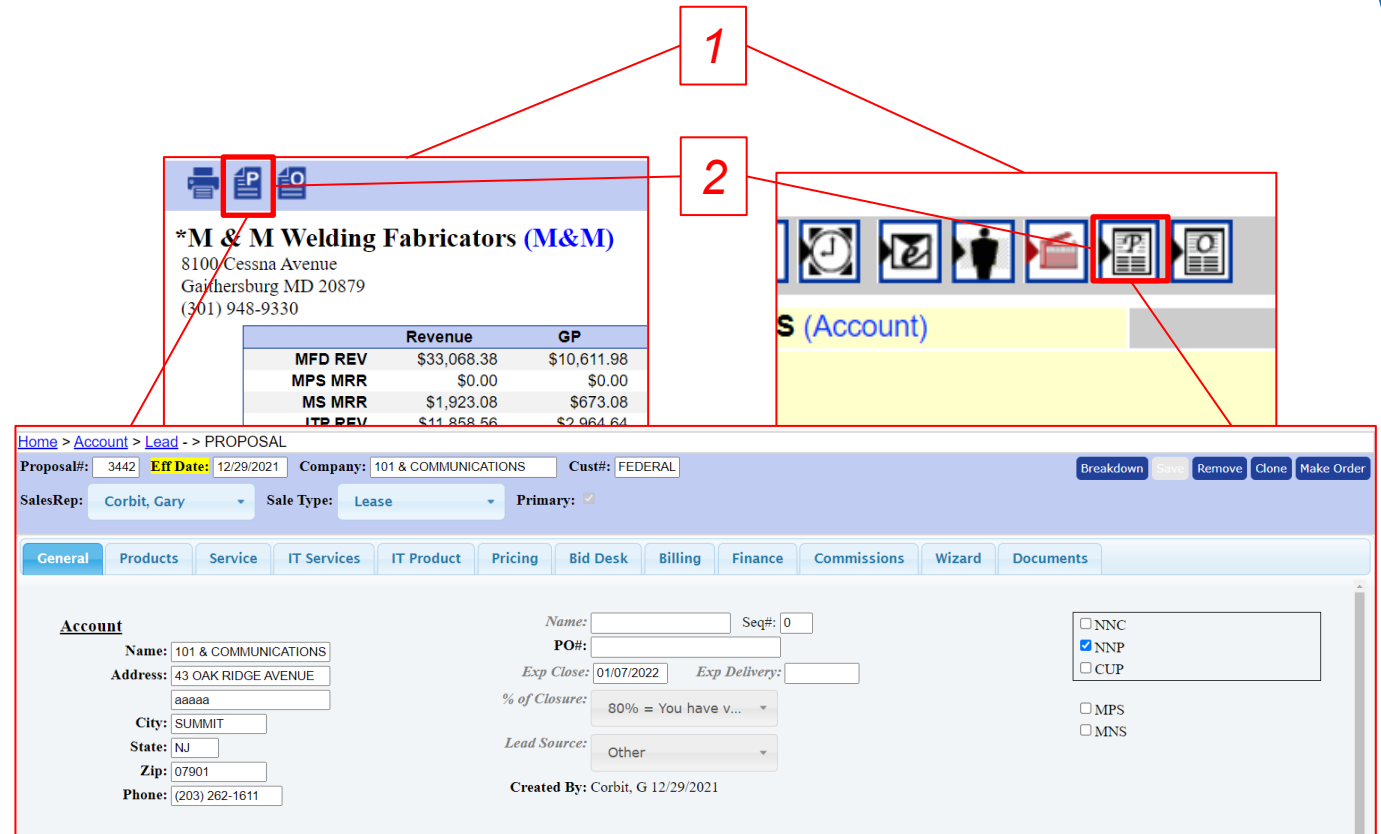
To make changes to leads in bulk, you can use the actions menu of the forecasting tools.

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



The screenshot shows the 'Lead' view for 'M & M Welding Fabricators (M&M)'. The top toolbar contains icons for various actions, with the 'New Proposal' icon (a document with a 'P') highlighted by a red box and labeled '1'. The lead's action bar also contains the same 'New Proposal' icon, highlighted by a red box and labeled '2'. Below the lead information, there is a table showing revenue and GP breakdowns.

	Revenue	GP
MFD REV	\$33,068.38	\$10,611.98
MPS MRR	\$0.00	\$0.00
MS MRR	\$1,923.08	\$673.08
ITP REV	\$11,858.56	\$2,964.64

The bottom section of the screenshot shows the 'PROPOSAL' form. The 'General' tab is selected, displaying account information for '101 & COMMUNICATIONS'. The form includes fields for Name, Address, City, State, Zip, Phone, PO#, Exp Close, Exp Delivery, % of Closure, Lead Source, and Created By. The 'NNP' checkbox is checked under the 'Account' section.


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.

How To: Create a New Proposal From the Account View

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

To create a new proposal:

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

Quick Tips:

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

1

2

Home -> ACCOUNT

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

Home > Account -> LEAD

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

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

Click here to create a new lead for your proposal

4

Home > Account > Lead -> PROPOSAL

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

SalesRep: Corbit, Gary Sale Type: Lease Primary:

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

Account


Name: 101 & COMMUNICATIONS Seq#: 0
 Address: 43 OAK RIDGE AVENUE
 City: SUMMIT
 State: NJ
 Zip: 07901
 Phone: (203) 262-1611

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

☐ NNC
☒ NNP
☐ CUP
☐ MPS
☐ MNS

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

To create a new order:

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

Quick Tips:

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

How To: Create a New Order From the Account View

1

2

Home -> ACCOUNT

ID/Cust#: 27298 / FEDERALRESERVE

Name: 101 & COMMUNICATIONS

DBA:

Lease Legal:

Phone:

Toll Free:

Fax:

URL:

Home > Account -> LEAD

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

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

Click here to create a new lead for your order

Home > Account > Lead -> ORDER

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

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

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

Account

Name: 101 & COMMUNICATIONS

Address: 43 OAK RIDGE AVENUE

City: SUMMIT

State: NJ

Zip: 07901

Phone: (203) 262-1611

Name:

PO#:

Exp Close: 10/22/2014 Exp Delivery:

% of Closure: 60% = You are Co...

Lead Source: Other

Created By: Corbit, G 01/06/2022

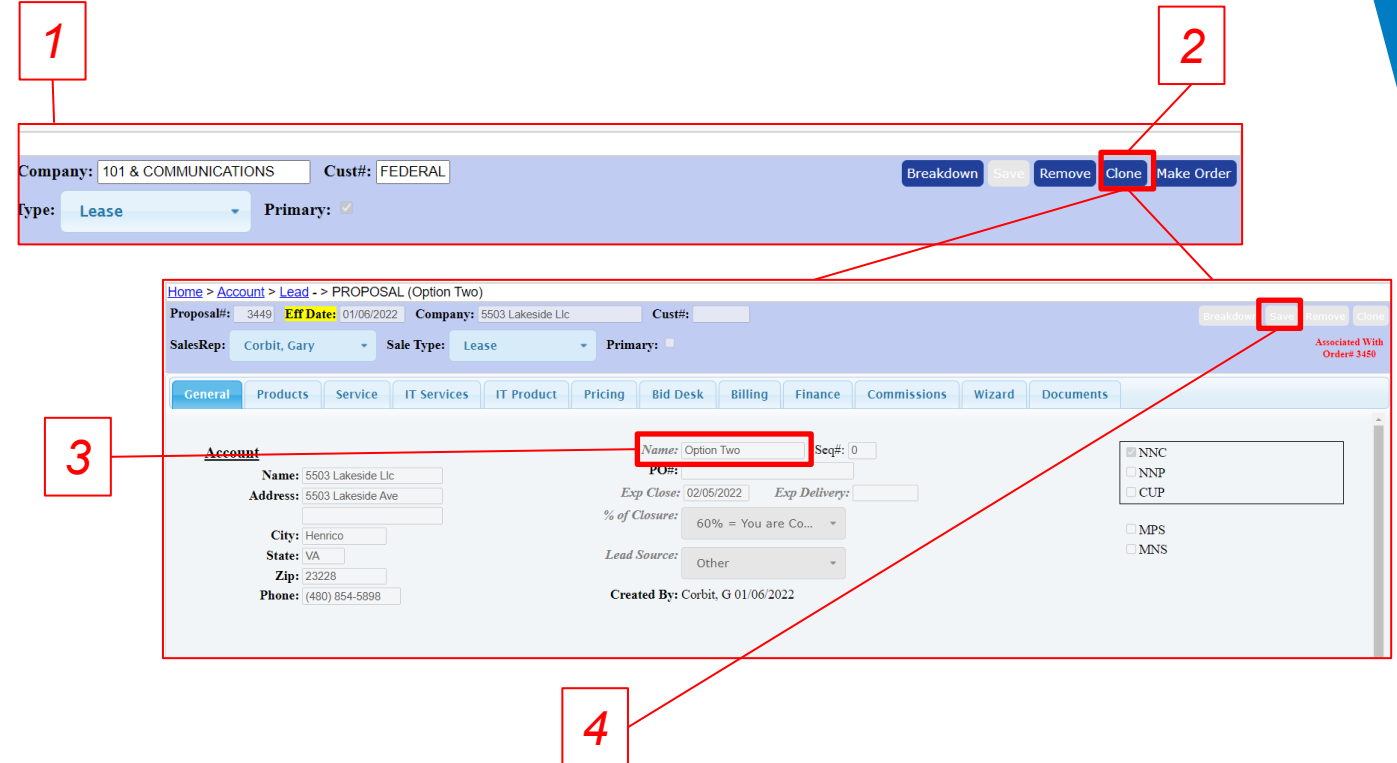
☐ NNC
☒ NNP
☐ CUP
☐ MPS
☐ MNS

How To: Clone a Proposal

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

To clone a proposal:

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



The screenshot illustrates the process of cloning a proposal in SalesChain. It is divided into four numbered steps:

- Step 1:** A proposal header for '101 & COMMUNICATIONS' is shown. The 'Clone' button is highlighted with a red box and a red line pointing to it.
- Step 2:** The 'Clone' button is clicked, leading to a new proposal screen. The 'Clone' button is highlighted with a red box and a red line pointing to it.
- Step 3:** The 'Name' field is set to 'Option Two'. The 'Name' field is highlighted with a red box and a red line pointing to it.
- Step 4:** The 'Save' button is highlighted with a red box and a red line pointing to it.

Quick Tips:

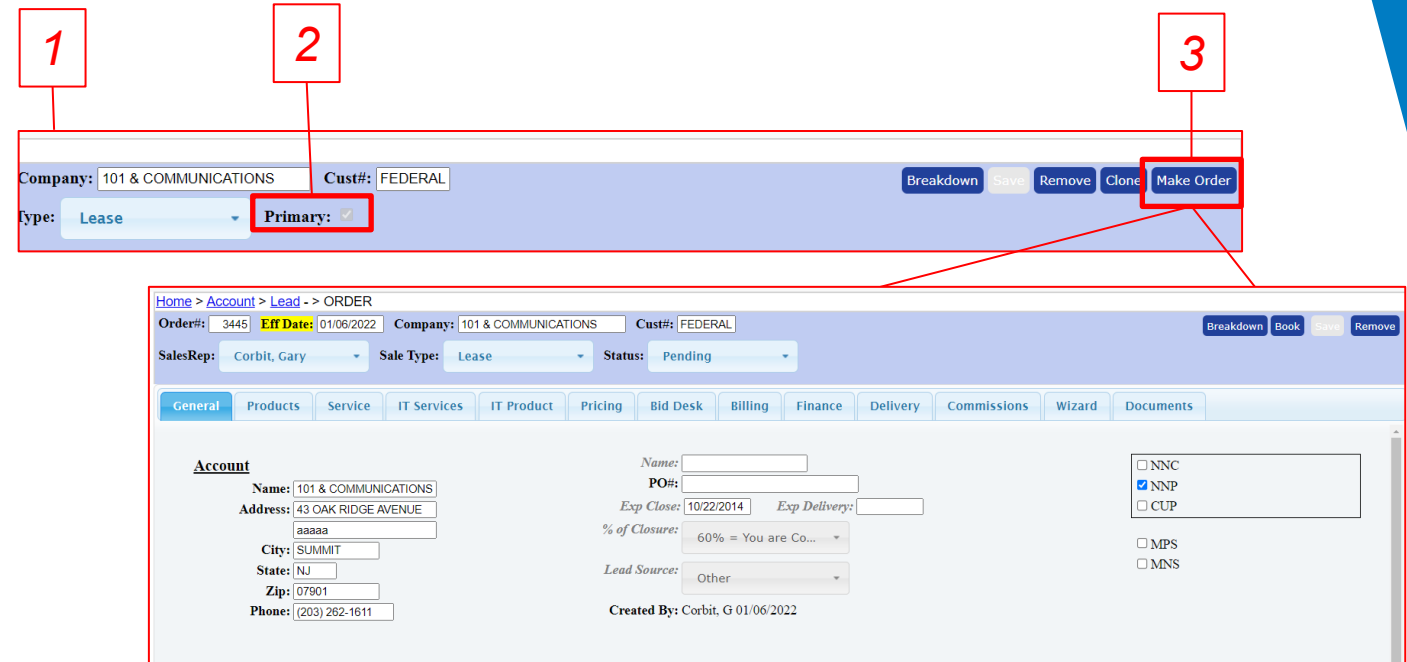
- The cloned proposal will not be designated as the primary unless you check the Primary box
- Be sure to name your second proposal for easy reference later. This name will only be visible to system users.

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.



The screenshot shows the SalesChain interface for a proposal. The top header bar contains the following information: Company: 101 & COMMUNICATIONS, Cust#: FEDERAL, and buttons for Breakdown, Save, Remove, Clone, and Make Order. Below this, the Type is set to Lease and the Primary checkbox is checked. The Make Order button is highlighted with a red box and a red arrow pointing to it from the number 3. Below the header bar, the main content area shows the order details, including the Order#, Eff Date, Company, Cust#, SalesRep, Sale Type, and Status. The General tab is selected, showing the Account information, including Name, Address, City, State, Zip, and Phone. The % of Closure is set to 60% = You are Co... and the Lead Source is set to Other. The Created By is Corbit, G 01/06/2022.

Quick Tips:

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

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

To set a proposal as the primary:

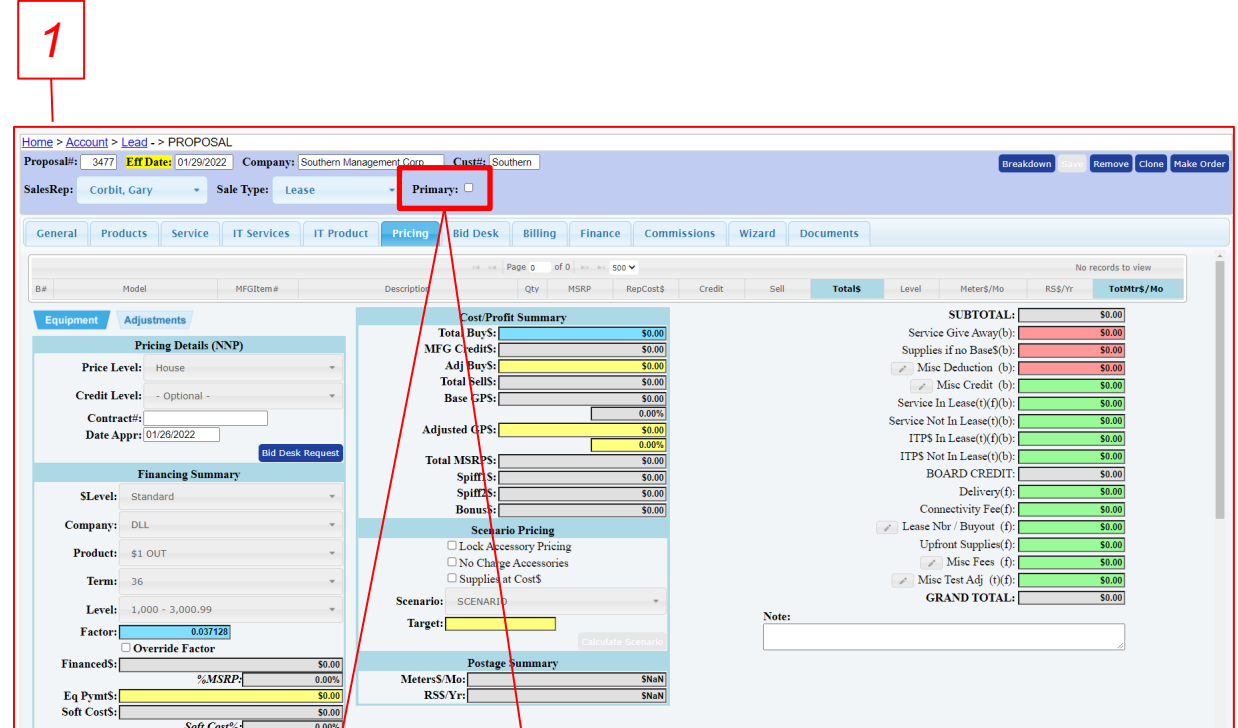
1. Navigate to the desired proposal
2. If unchecked, check the box next to *Primary*
3. Click the red flashing Save button

Quick Tip:

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

How To: Set a Proposal as the Primary Proposal

1



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

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

Equipment Adjustments

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

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

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

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

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

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

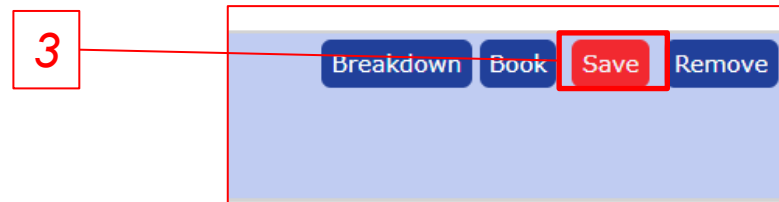
Note:
 No records to view

2



Primary: ☒

3



Breakdown Book **Save** Remove

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

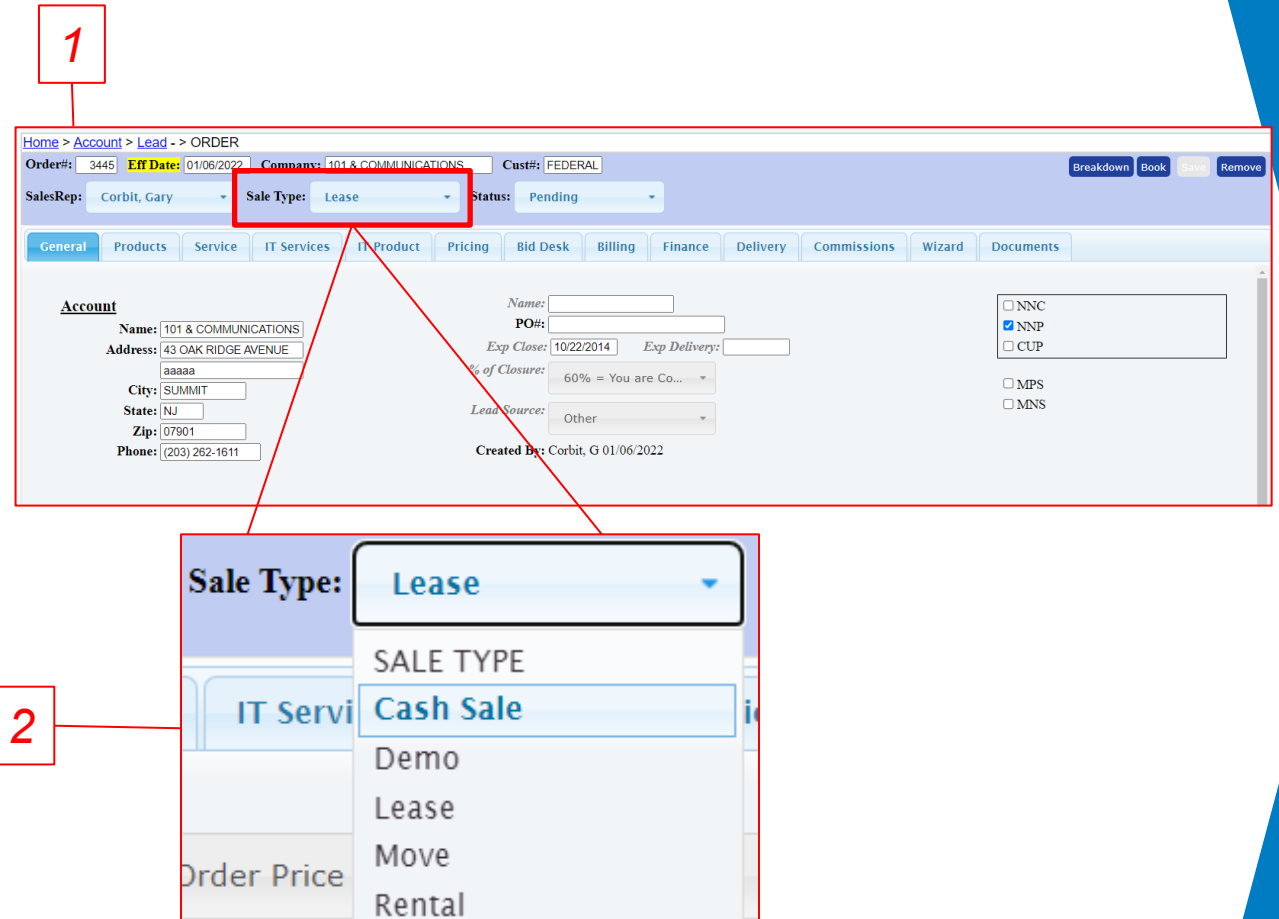
Important: some available fields in the proposal and order process – particularly those related to financing – will become unavailable if the sale type is changed away from Lease.

To change a proposal or order's sale type:

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

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

1



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

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

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

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

SALE TYPE
 Cash Sale
 Demo
 Lease
 Move
 Rental

2

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.

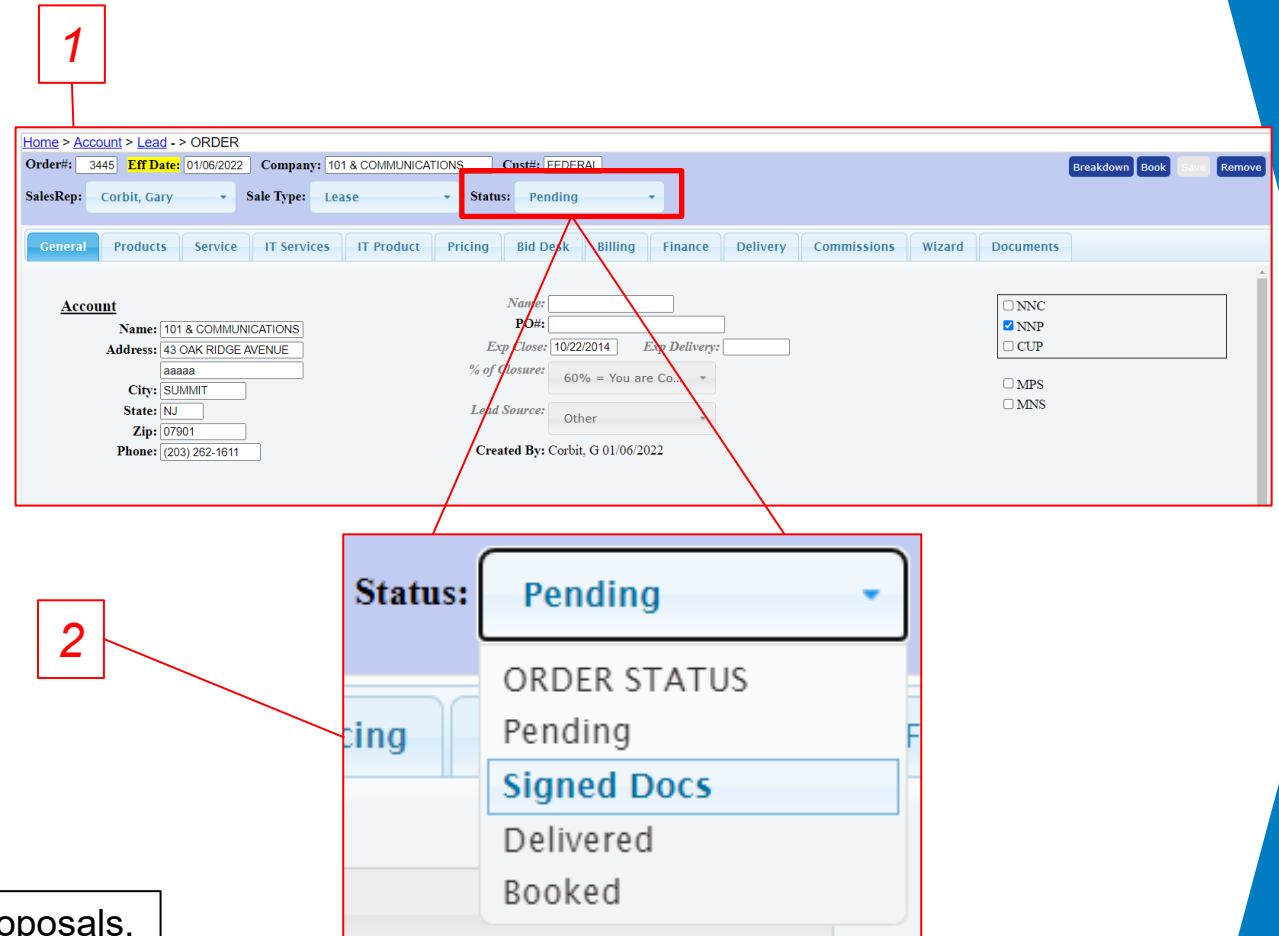
To change an order's status:

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

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.

1



The screenshot shows the 'ORDER' header in the SalesChain system. The 'Status' dropdown menu is open, showing the following options: Pending, Signed Docs, Delivered, and Booked. The 'Signed Docs' option is highlighted. The order details include: Order#: 3445, Eff Date: 01/06/2022, Company: 101 & COMMUNICATIONS, Cust#: FEDERAL, SalesRep: Corbit, Gary, Sale Type: Lease, and Status: Pending. The account information for 101 & COMMUNICATIONS is also visible, including address, city, state, zip, and phone.

2

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

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

- 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 screenshot displays the 'Order Desk' interface. At the top, a blue header bar contains the title 'Order Desk' and a search bar. Below the header, a table lists orders with columns for various fields. A left-hand menu provides navigation options. Red callout boxes with numbers 1 through 12 point to specific UI elements:

- 1: Print icon
- 2: Refresh icon
- 3: Filter icon
- 4: Grid icon
- 5: Search bar
- 6: Filter icon
- 7: Filter icon
- 8: Filter icon
- 9: Search bar
- 10: Filter icon
- 11: Filter icon
- 12: Filter icon

The table data is as follows:

	COMPANY	TR	ORDER# CUST# PR-LEVEL	STATUS DT CLOSED SALE TYPE SALES REP	PLC	MPS	MNS MONTHS ANNUALS TERM	NBR	REVS GPS	BCS GPBCS	LS PYMTS PRODUCT TERM	FCO LS SUB DT LS APPR DT LS EXP DT	HV REVS HV GPS	MFG
<input checked="" type="checkbox"/>	*M & M Welding Fabricators 8100 Cessia Avenue Gardnersburg, MD 20879 (301) 948-9330 Name: Test	<input checked="" type="checkbox"/>	3447 M&M House	Pending 01/06/2022 Lease Corbit, G	NNP	N	N	10	\$15,906 \$4,631	\$15,906 \$4,631	\$550 \$1 OUT 36	DLL	\$0	Canon Lexmark
<input type="checkbox"/>	101 & COMMUNICATIONS 43 OAK RIDGE AVENUE aaaaa SUMMIT, NJ 07901 (203) 262-1611	<input type="checkbox"/>	3445 FEDERALRESERVE House	Pending 01/06/2022 Lease Corbit, G	NNP	N	N	0	\$0	\$0	\$0 \$1 OUT 36	DLL	\$0	
<input type="checkbox"/>	11th Communications Squadron 110 Luke Avenue Suite 200 aka Bolling AFB, DC 20032 (202) 767-8031	<input type="checkbox"/>	3444 House	Pending 01/05/2022 Lease Corbit, G	NNC	N	N	1	\$27,946 \$9,781	\$27,946 \$9,781	\$966 \$1 OUT 36	DLL	\$0	Canon

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.

Used Equipment

View 1 - 50 of 125

🔍

+

SALES REP

MODEL

CATEGORY

STATUS

EQ ID	Serial Number	Category	Comment	Machine	Meter	Price	Expiration	Status
<input type="checkbox"/>	87332	E153M610001		Ricoh MP C3003 Color Cabinet Type F	BIW: 454,632 Color: 69,736	\$0.00	06/06/2023	Protected Prerelease For: Crea, S
<input type="checkbox"/>	77099	01SAT1	test test	Konica Bizhub C253	BIW: 0 Color: 0	\$0.00	06/06/2023	Protected Prerelease For: Sarrazin, P
<input type="checkbox"/>	53752	K6965200282		Ricoh 2075 S/p Digital	BIW: 0	\$0.00		Prerelease
<input type="checkbox"/>	79873	E153M660064		Ricoh MP C3003 Color Finisher S3140 (03/54 Series) Postscript3 Unit Type M3 LCIT PB3230 (03/04/54/55 Series) Bridge Unit BU3070 (03/04/54/55/EX Series)	BIW: 493,020 Color: 118,524	\$0.00	06/06/2023	Protected Prerelease For: Daninger, D
<input type="checkbox"/>	36751	10800350	PR2	Ricoh Ap3200n Printer (c)	BIW: 0	\$0.00		Prerelease
<input type="checkbox"/>	104010	W914PA05254	D2	Ricoh MP 3015SPF Copier Paper Feed Unit Ty Pb1040 (MP3015SPF) Cabinet Type Fac58	BIW: 312,476	\$0.00	06/06/2023	Protected Prerelease For: Daninger, D
<input type="checkbox"/>	104024	G144R902122	D2	Ricoh MP 2554SP Copier Cabinet Type F Fax Option Type M12 (54/55 Series)	BIW: 132,151	\$0.00	06/06/2023	Protected Prerelease For: Crea, S
<input type="checkbox"/>	104430	G164RA30182	D3	Ricoh MP 3554SP Copier Cabinet Type F Fax Option Type M12 (54/55 Series)	BIW: 517,409	\$0.00	06/06/2023	Protected Prerelease For: Sarrazin, P EA Rep: Luke Torborg
<input type="checkbox"/>	107067	V9316000211	72	Ricoh MP C3001 Color	BIW: 153,656 Color: 41,196	\$0.00		Prerelease
<input type="checkbox"/>	109872	GG308445	Scanner	Canon Dr-g1100 Scanner		\$0.00		Prerelease
<input type="checkbox"/>	111221	W915PB07515	D2	Ricoh MP 3015SPF Copier	BIW: 213,976	\$0.00	06/06/2023	Protected Prerelease For: Skelliv, D
<input type="checkbox"/>	111376	D265Z800247	DU	Ricoh DD 3334 Digital Duplicator Cabinet Type 45 Platen Cover PN2000	BIW: 308,280	\$0.00	06/06/2023	Protected Prerelease For: deCathelineau, C
<input type="checkbox"/>	112141	G446P101212	72	Ricoh MP C306SPF Color Copier	BIW: 8,933 Color: 4,187	\$0.00		Prerelease

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.

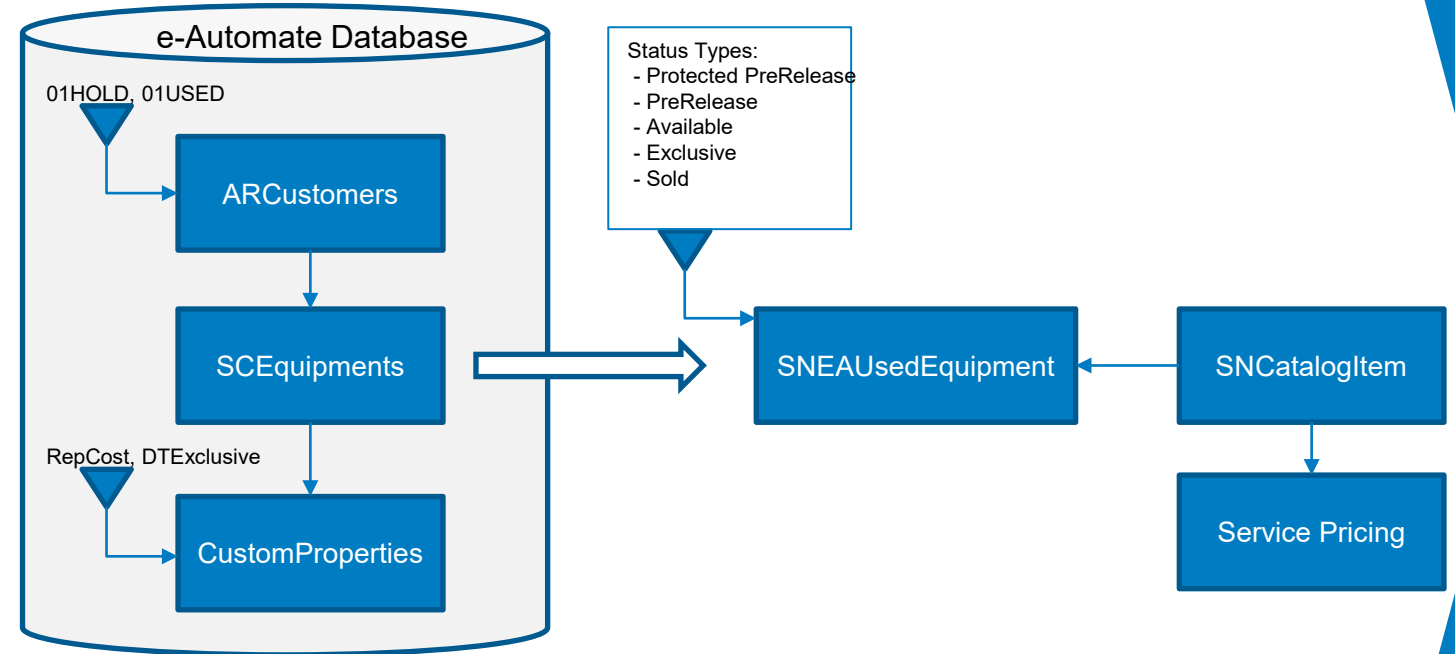
92

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.

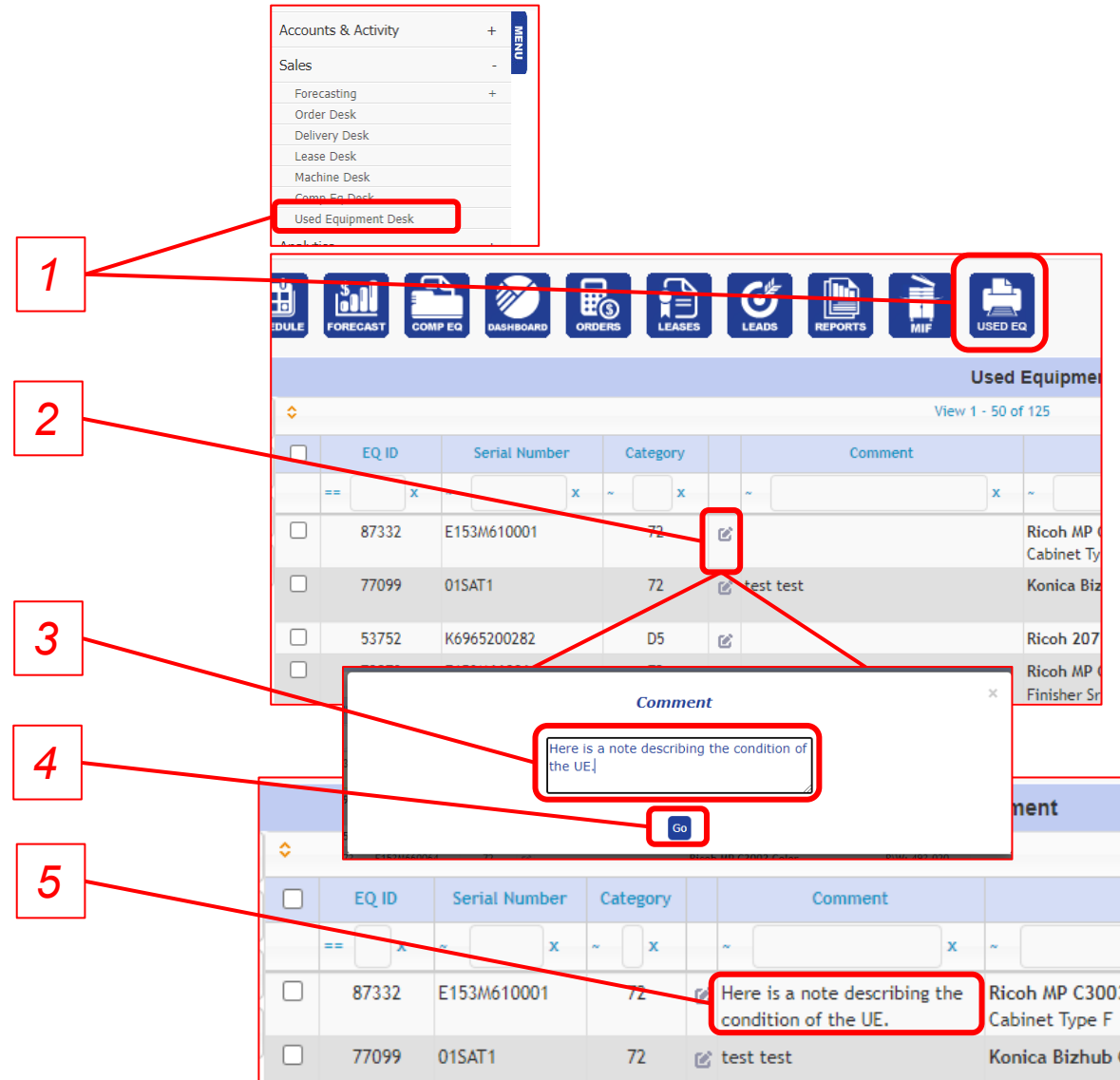
It is possible to add a free-form note to any used equipment item displayed in the used equipment desk.

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: Add a Note to a Used Machine



The screenshot illustrates the process of adding a note to a used machine in the SalesChain system. The interface includes a sidebar menu, a top navigation bar, and a main content area with a table of equipment items.

Step 1: The sidebar menu is shown with 'Used Equipment Desk' highlighted. The top navigation bar also features a 'USED EQ' icon.

Step 2: The 'Used Equipment' table is displayed. The table has columns for EQ ID, Serial Number, Category, and Comment. A red box highlights the note icon (a document with a pencil) in the Comment column for the first row (EQ ID 87332).

Step 3: A 'Comment' pop-up dialog box is shown. It contains a text input field with the placeholder text 'Here is a note describing the condition of the UE.' and a 'Go' button.

Step 4: The 'Go' button is clicked, and the note is added to the table.

Step 5: The table is updated, showing the note 'Here is a note describing the condition of the UE.' in the Comment column for the first row.

EQ ID	Serial Number	Category	Comment
87332	E153M610001	72	Here is a note describing the condition of the UE.
77099	01SAT1	72	test test
53752	K6965200282	D5	

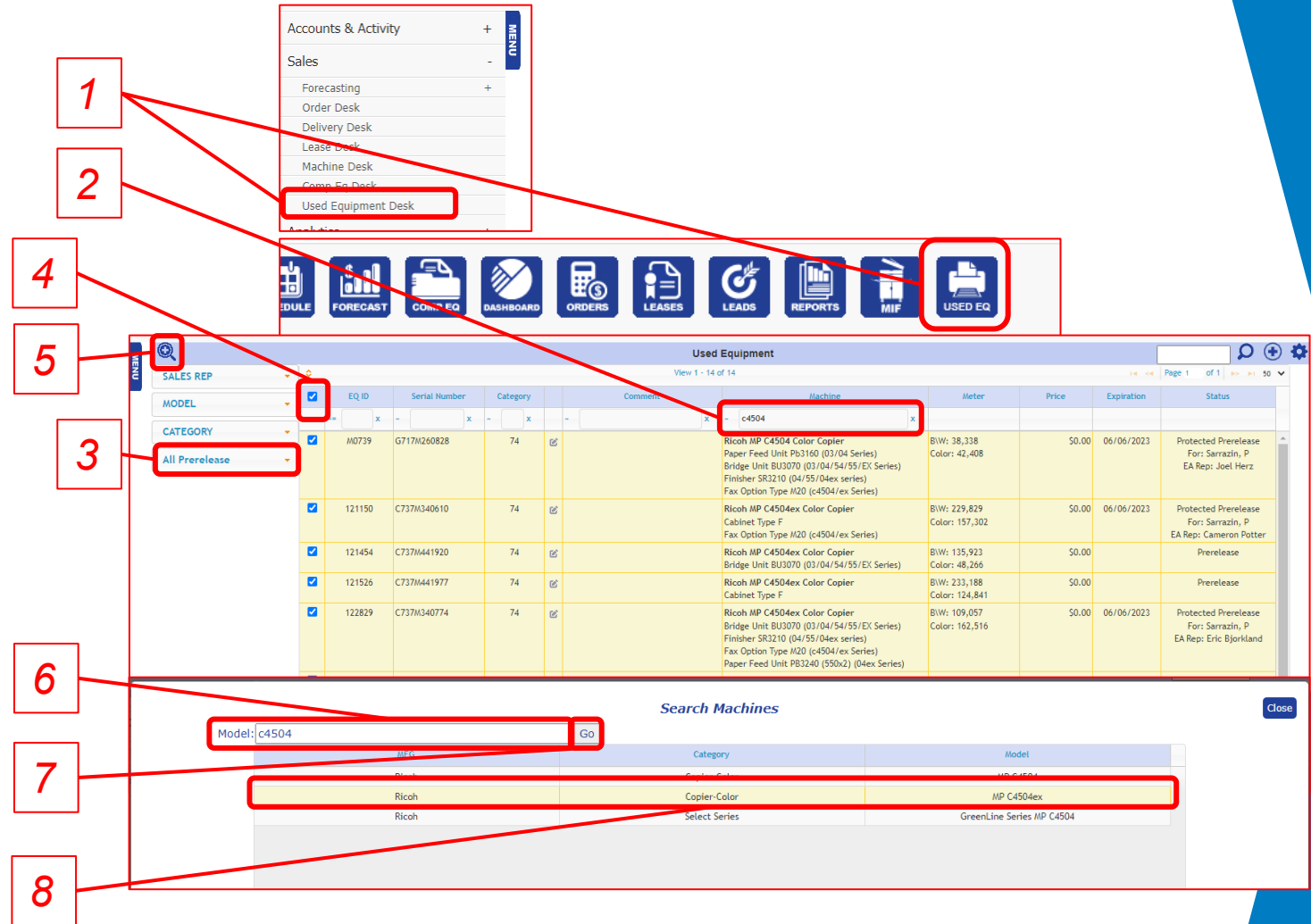
How To: Associate a Pre-Release Item to a Catalog Item

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.



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

- 1:** The 'Menu' icon in the top right corner.
- 2:** The 'Used Equipment Desk' option in the 'Sales' dropdown menu.
- 3:** The 'All Prerelease' filter option in the left sidebar.
- 4:** The 'USED EQ' icon in the top navigation bar.
- 5:** The 'Assign Catalog Item' icon (a document with a plus sign) in the top right of the 'Used Equipment' table.
- 6:** The 'Model' search input field in the 'Search Machines' dialog.
- 7:** The 'Go' button in the 'Search Machines' dialog.
- 8:** The 'Ricoh MP C4504ex' catalog item in the search results.

The 'Used Equipment' table displays the following data:

EQ ID	Serial Number	Category	Machine	Meter	Price	Expiration	Status
110739	G717M260828	74	Ricoh MP C4504 Color Copier Paper Feed Unit PB3160 (03/04 Series) Bridge Unit BU3070 (03/04/54/55/EX Series) Finisher SR3210 (04/55/04ex series) Fax Option Type H20 (c4504/ex Series)	BIW: 38,338 Color: 42,408	\$0.00	06/06/2023	Protected Prerelease For: Sarrazin, P EA Rep: Joel Herz
121150	C737M340610	74	Ricoh MP C4504ex Color Copier Cabinet Type F Fax Option Type H20 (c4504/ex Series)	BIW: 229,829 Color: 157,302	\$0.00	06/06/2023	Protected Prerelease For: Sarrazin, P EA Rep: Cameron Potter
121454	C737M441920	74	Ricoh MP C4504ex Color Copier Bridge Unit BU3070 (03/04/54/55/EX Series)	BIW: 135,923 Color: 48,266	\$0.00		Prerelease
121526	C737M441977	74	Ricoh MP C4504ex Color Copier Cabinet Type F	BIW: 233,188 Color: 124,841	\$0.00		Prerelease
122829	C737M340774	74	Ricoh MP C4504ex Color Copier Bridge Unit BU3070 (03/04/54/55/EX Series) Finisher SR3210 (04/55/04ex series) Fax Option Type H20 (c4504/ex Series) Paper Feed Unit PB3240 (550x2) (04ex Series)	BIW: 109,057 Color: 162,516	\$0.00	06/06/2023	Protected Prerelease For: Sarrazin, P EA Rep: Eric Bjorkland

The 'Search Machines' dialog shows the following results:

Model	Category	Model
Ricoh	Copier-Color	MP C4504ex
Ricoh	Select Series	GreenLine Series MP C4504

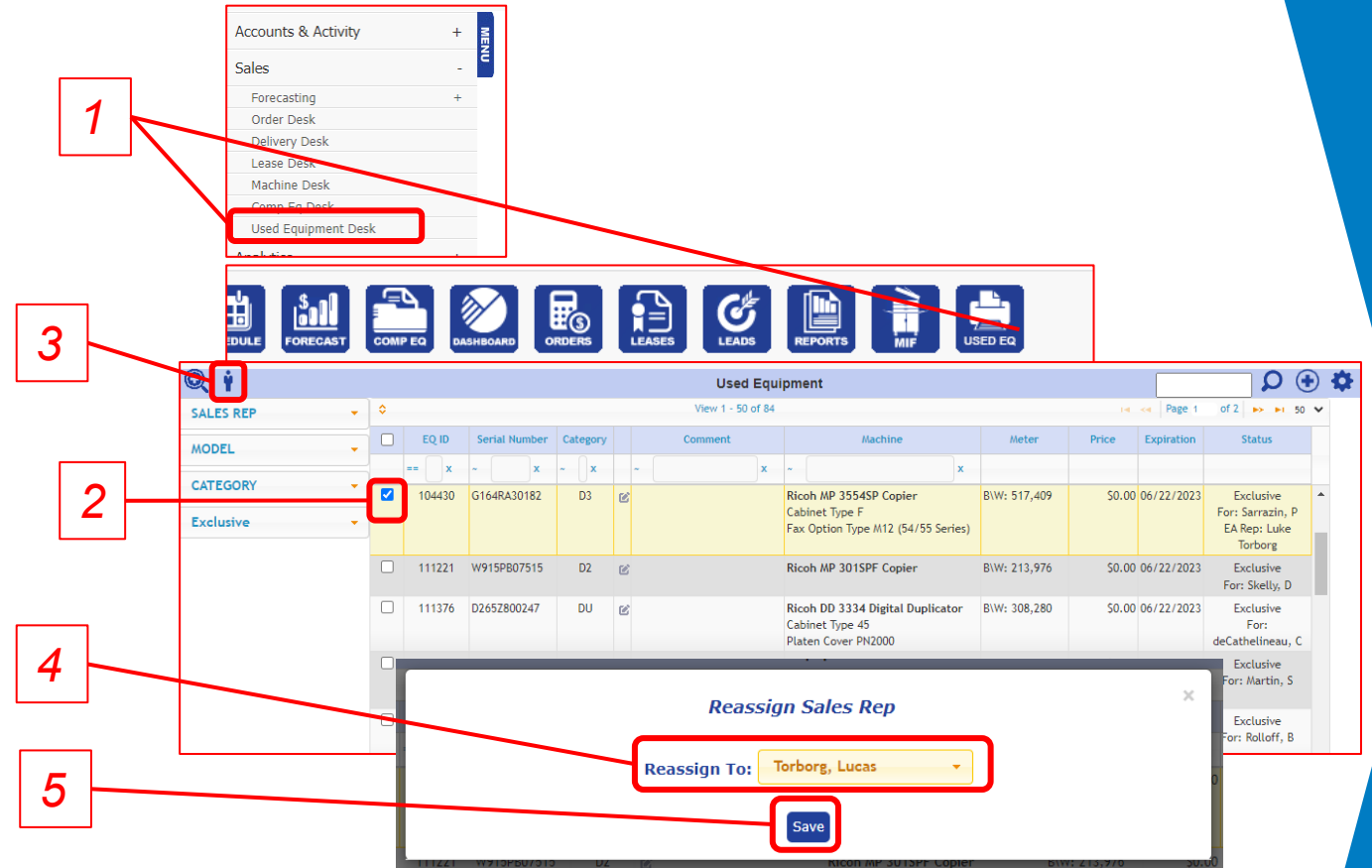
How To: Change the Rep Assigned to Used Equipment

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.



The screenshot shows the 'Used Equipment' desk interface. A table lists equipment with columns for EQ ID, Serial Number, Category, Comment, Machine, Meter, Price, Expiration, and Status. The first row is selected. A 'Reassign Sales Rep' dialog box is open, showing a dropdown menu for 'Reassign To' with 'Torborg, Lucas' selected. A 'Save' button is at the bottom of the dialog.

EQ ID	Serial Number	Category	Comment	Machine	Meter	Price	Expiration	Status
104430	G164RA30182	D3		Ricoh MP 3554SP Copier Cabinet Type F Fax Option Type M12 (54/55 Series)	BIW: 517,409	50.00	06/22/2023	Exclusive For: Sarrazin, P EA Rep: Luke Torborg
111221	W915PB07515	D2		Ricoh MP 301SPF Copier	BIW: 213,976	50.00	06/22/2023	Exclusive For: Skelly, D
111376	D265Z800247	DU		Ricoh DD 3334 Digital Duplicator Cabinet Type 45 Platen Cover PH2000	BIW: 308,280	50.00	06/22/2023	Exclusive For: deCathelineau, C

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.

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

Contacts					Activity	TCO Analysis	Sales	Marketing	CompeQ	Groups	WorkFlow	SRA	ALL
Leads													
LEAD#/ SALES REP		STATUS/ CATEGORY		ASSOCIATED WITH				PROPS/ GP\$		SUBMIT ON/ EXP CLOSE			
4521 Corbit		Working Sales Rep		Account 5503 Lakeside Llc				\$55,923.08 \$19,573.08		01/06/2022 02/05/2022			

2

Proposals							
PROPOSAL#		DATE SALES REP		LABEL ADDRESS		TOTAL \$ GP\$	
*3448		01/06/2022 Gary Corbit		Option One 5503 Lakeside Ave Henrico, VA 23228		\$55,923.08 \$19,573.08	
3449		01/06/2022 Gary Corbit		Option Two 5503 Lakeside Ave Henrico, VA 23228		\$39,230.77 \$13,730.77	
* Indicates primary proposal							

3

Orders							
ORDER# STATUS		DATE SALES REP		LABEL ADDRESS		TOTAL \$ GP\$	
3450 Pending		01/06/2022 Gary Corbit		Option One 5503 Lakeside Ave Henrico, VA 23228		\$55,923.08 \$19,573.08	

Quick Tips:

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

Home > Account -> LEAD

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

Address: 5503 Lakeside Ave
Henrico, VA 23228 map

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

Lead ID# 4521 Expected Delivery:

Instructions:

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

Source: Other

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

Classification: Net-New Customer InPlace Vendor:

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

* Expected Close: 02/05/2022

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

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

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

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

Next Step:

Quick Note:

zoom Save

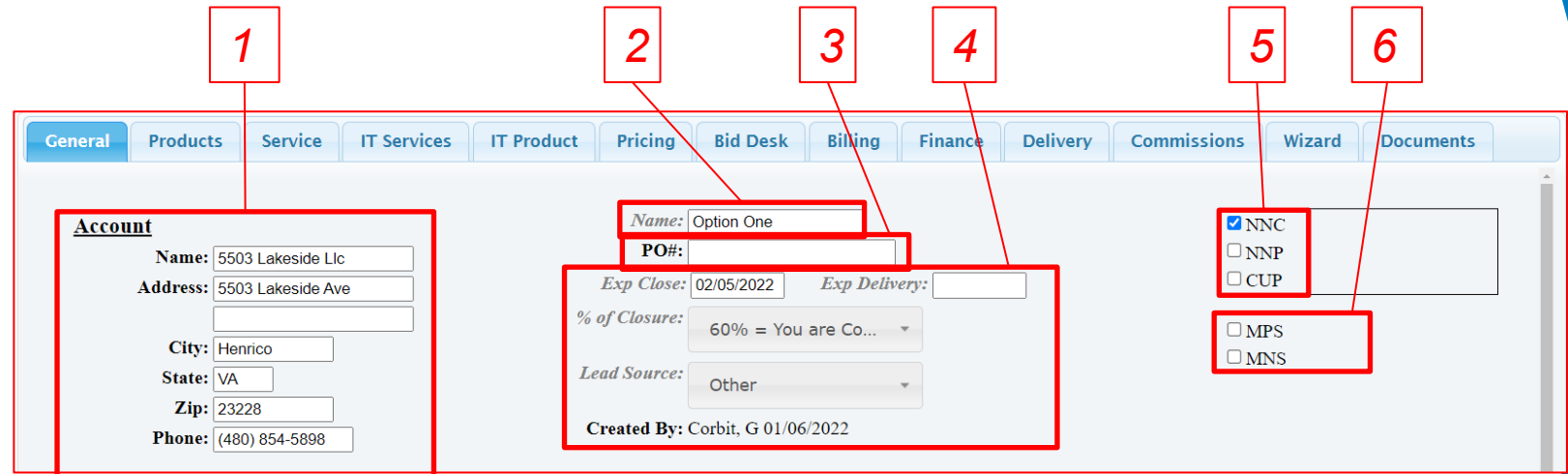
Tab	Page Number	Description
General	<u>94</u>	Enter basic account and lead information
Products	<u>95</u>	Add, edit or remove product bundles
Service	<u>101</u>	Configure various service contract options
IT Services	<u>108</u>	Add, edit or remove IT services offerings
IT Product	<u>111</u>	Add, edit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

Proposal and Order Pricing: The General Tab

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

Key:

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

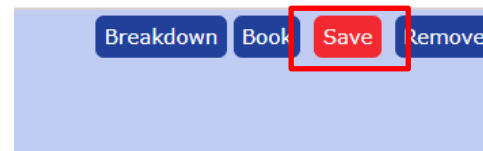


The screenshot shows the 'General' tab of the SalesChain interface. The top navigation bar includes tabs for General, Products, Service, IT Services, IT Product, Pricing, Bid Desk, Billing, Finance, Delivery, Commissions, Wizard, and Documents. The main content area is divided into several sections:

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

Quick Tips:



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



Proposal and Order Pricing: The Products Tab

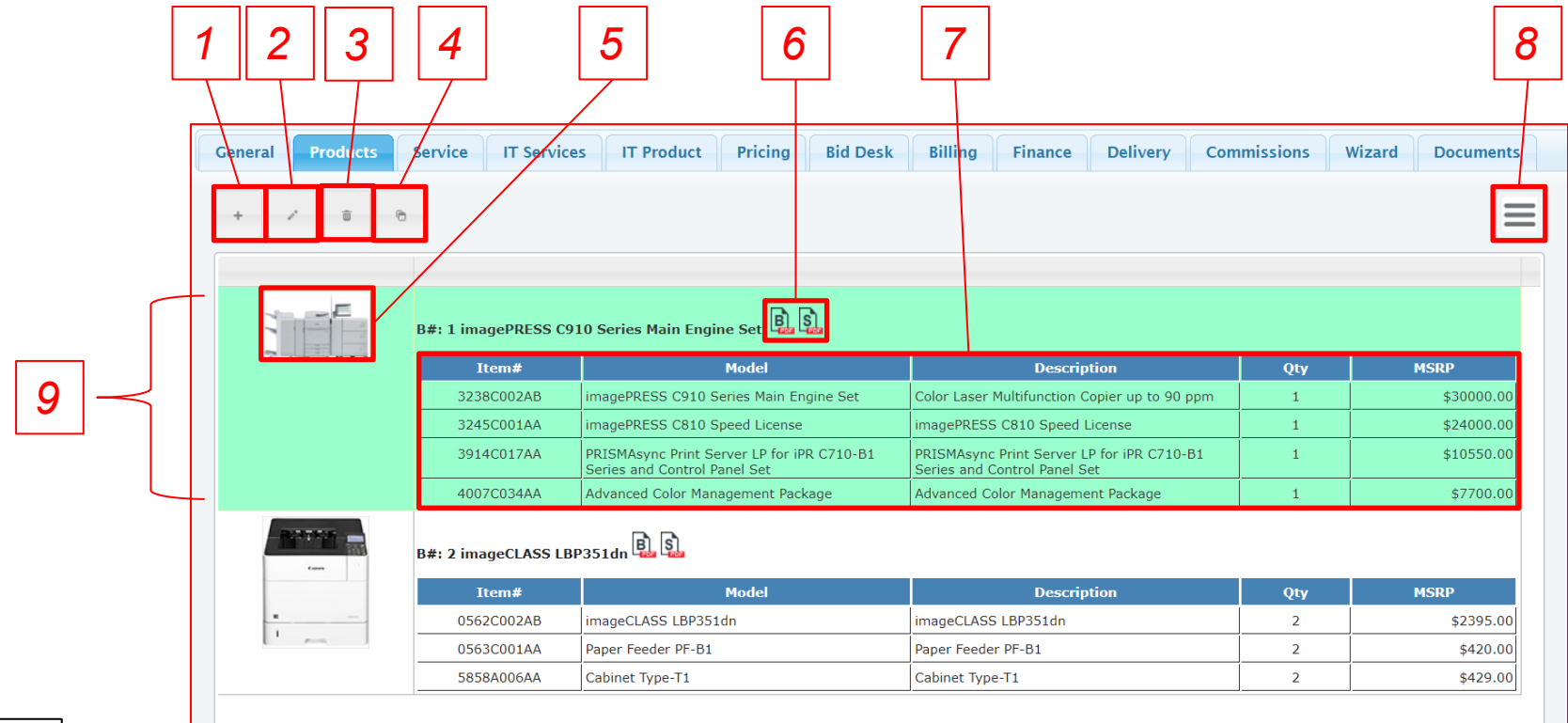
The products tab of the order breakdown allows users to view, add and edit equipment to this proposal or order from SalesChain's hardware catalog.

Key:

- 1) Add a new bundle
- 2) Edit this bundle
- 3) Delete this bundle
- 4) Clone this bundle
- 5) Mainframe Image
- 6) Open the brochure  and spec sheet  for this mainframe
- 7) Bundle contents
- 8) View these products in the *line-item* view. For a table-style breakdown of the equipment see page 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.



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

B#: 1 imagePRESS C910 Series Main Engine Set

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

B#: 2 imageCLASS LBP351dn

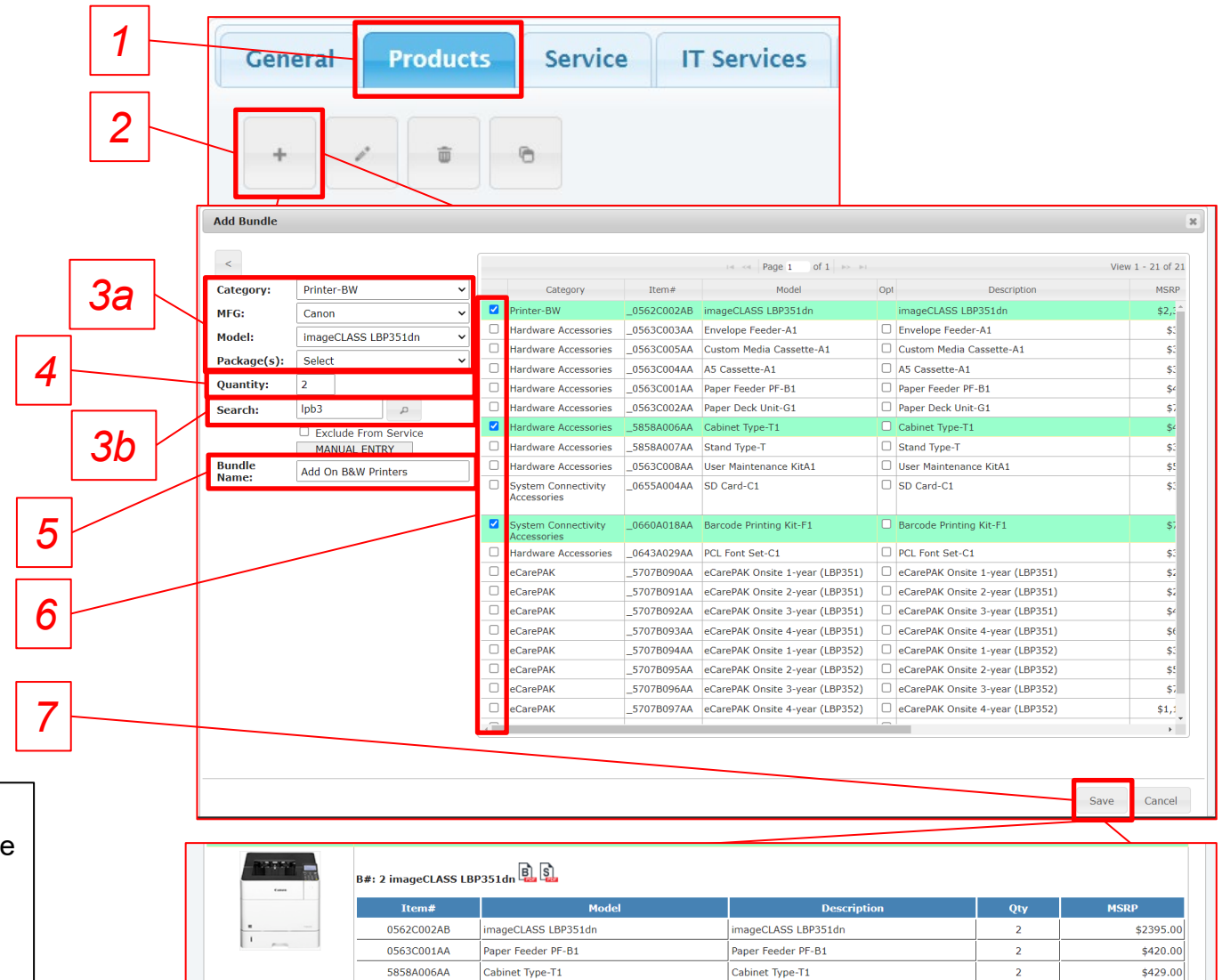
Item#	Model	Description	Qty	MSRP
0562C002AB	imageCLASS LBP351dn	imageCLASS LBP351dn	2	\$2395.00
0563C001AA	Paper Feeder PF-B1	Paper Feeder PF-B1	2	\$420.00
5858A006AA	Cabinet Type-T1	Cabinet Type-T1	2	\$429.00

How To: Add a New Bundle From The Catalog

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

To add a bundle to a proposal or order:

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



3a Category: Printer-BW

3b MFG: Canon

4 Model: imageCLASS LBP351dn

5 Quantity: 2

6 Search: lpb3

7 Bundle Name: Add On B&W Printers

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

B#: 2 imageCLASS LBP351dn

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

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)

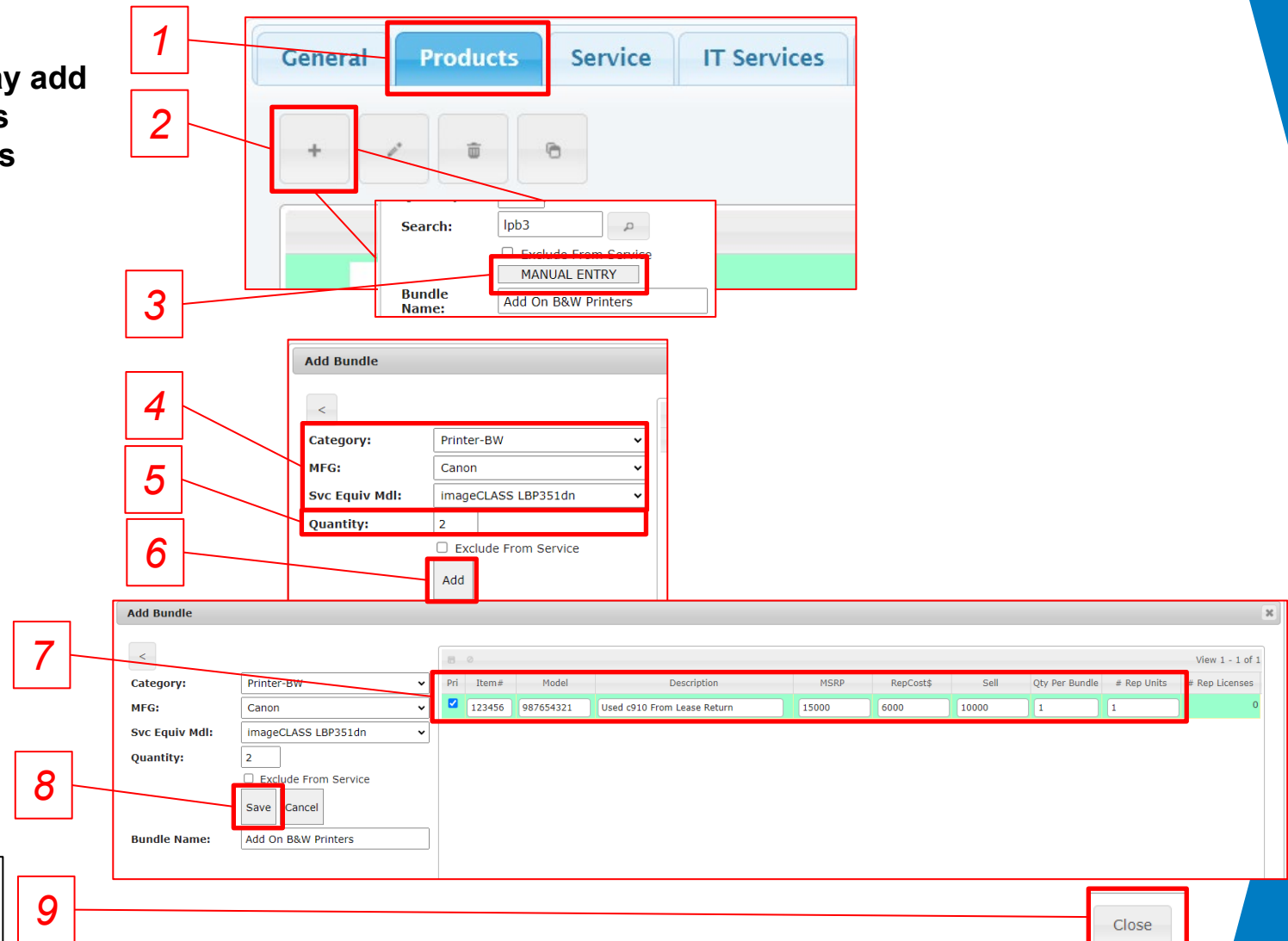
In the product tab of a proposal or order, you may add one or many bundles without using SalesChain's catalog, each representing one mainframe and its accessories.

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".

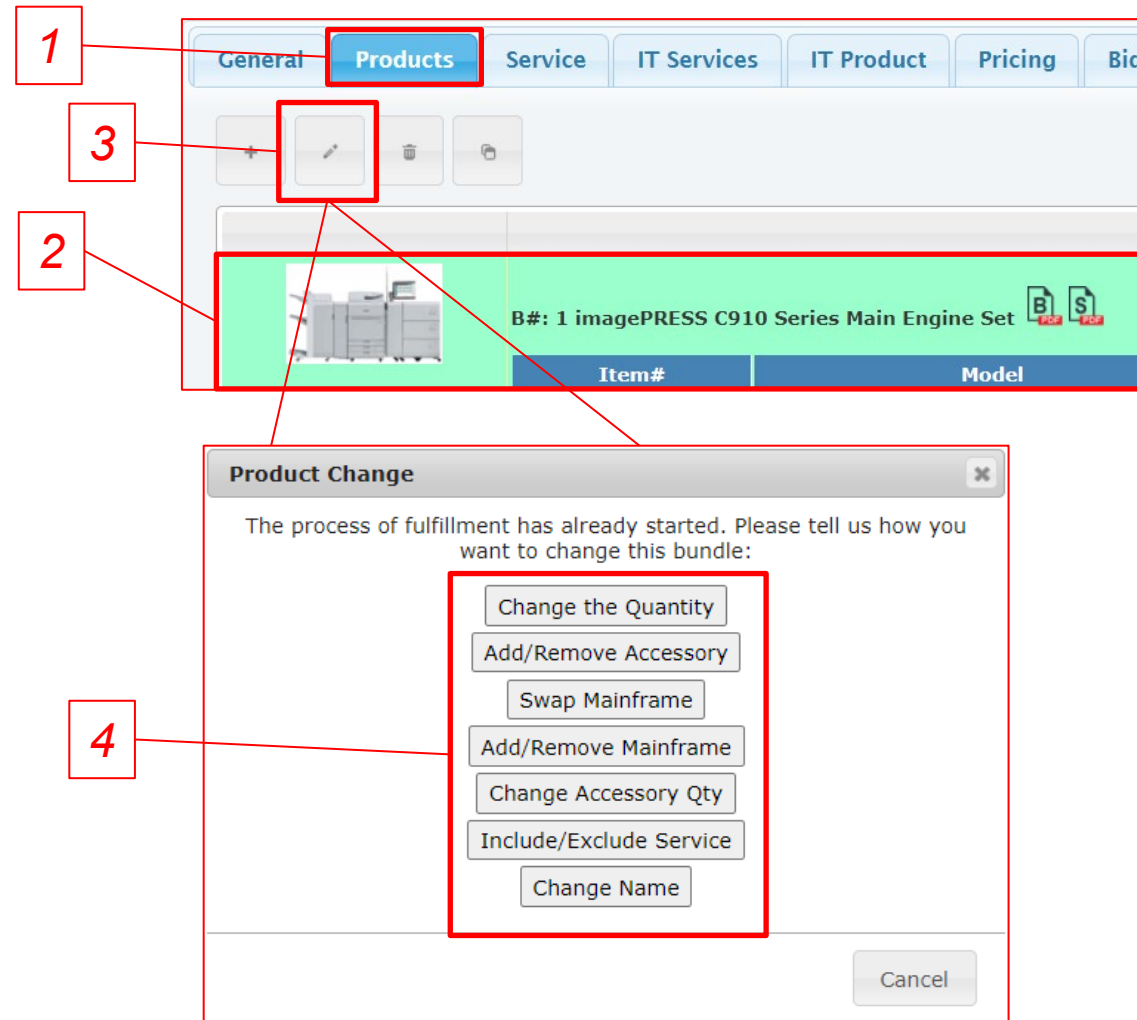


The screenshot illustrates the process of manually adding a bundle in the SalesChain system. The interface is divided into tabs: General, Products, Service, and IT Services. The 'Products' tab is active, showing a search bar and a 'MANUAL ENTRY' button. The 'Add Bundle' dialog box is open, displaying a table with columns: Pri, Item#, Model, Description, MSRP, RepCost\$, Sell, Qty Per Bundle, # Rep Units, and # Rep Licenses. The table contains one row with the following data: Pri (checked), Item# (123456), Model (987654321), Description (Used c910 From Lease Return), MSRP (15000), RepCost\$ (6000), Sell (10000), Qty Per Bundle (1), # Rep Units (1), and # Rep Licenses (0). The 'Add Bundle' dialog box also includes fields for Category, MFG, Svc. Equiv Mdl, and Quantity, as well as a checkbox for 'Exclude From Service' and buttons for 'Add', 'Save', 'Cancel', and 'Close'.

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

To edit a bundle:

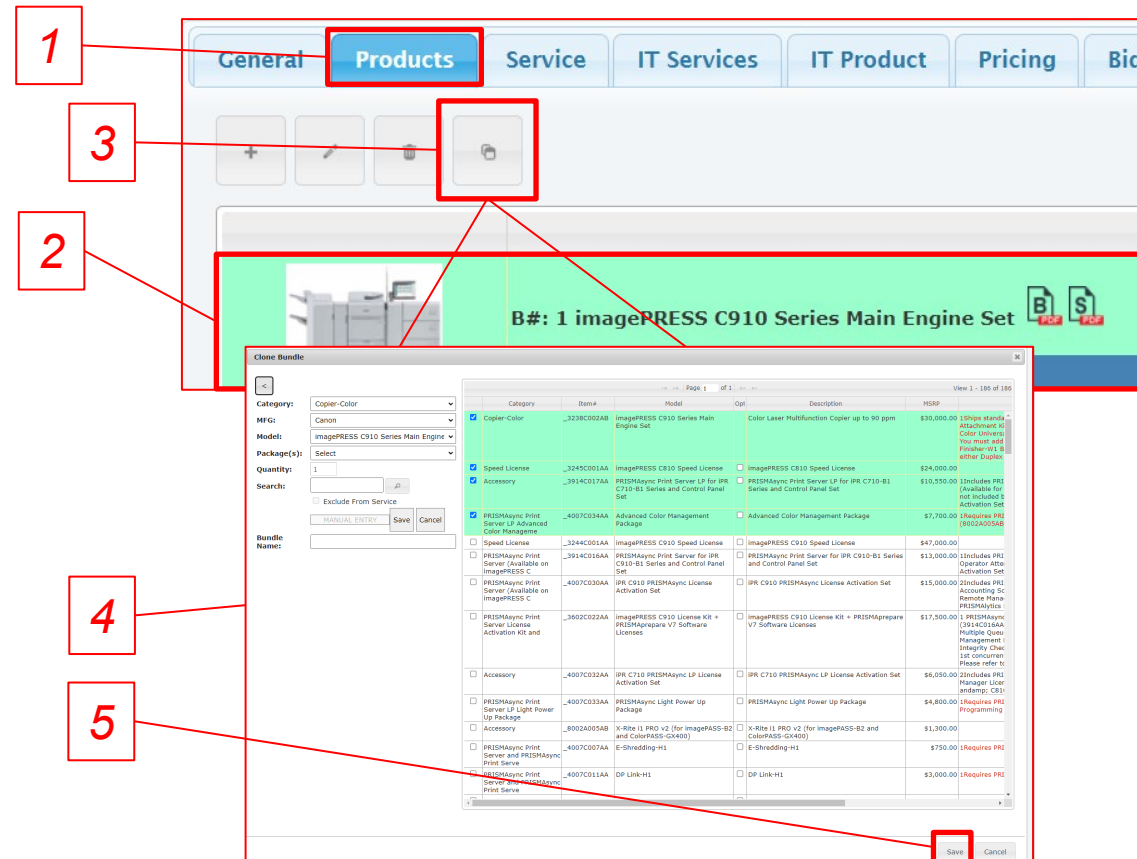
1. Navigate to the *Products* tab
2. Select the bundle you would like to edit by clicking on it. The selected bundle will turn green.
3. Click the *edit bundle* button
4. Select the characteristic of the bundle you would like to edit and make your desired changes



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

To clone a bundle:

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



The screenshot shows the 'Products' tab in the SalesChain interface. A bundle named 'B#: 1 imagePRESS C910 Series Main Engine Set' is selected and highlighted in green. A 'Clone Bundle' dialog box is open, displaying a table of items to be cloned. The table has columns for Item#, Model, Description, Qty, and MSRP. The items listed are:

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

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

B#: 2 imagePRESS C910 Series Main Engine Set				
Item#	Model	Description	Qty	MSRP
3238C002AB	imagePRESS C910 Series Main Engine Set	Color Laser Multifunction Copier up to 90 ppm	1	\$30000.00
3245C001AA	imagePRESS C810 Speed License	imagePRESS C810 Speed License	1	\$24000.00
3914C017AA	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	PRISMAsync Print Server LP for IPR C710-B1 Series and Control Panel Set	1	\$10550.00
4007C034AA	Advanced Color Management Package	Advanced Color Management Package	1	\$7700.00

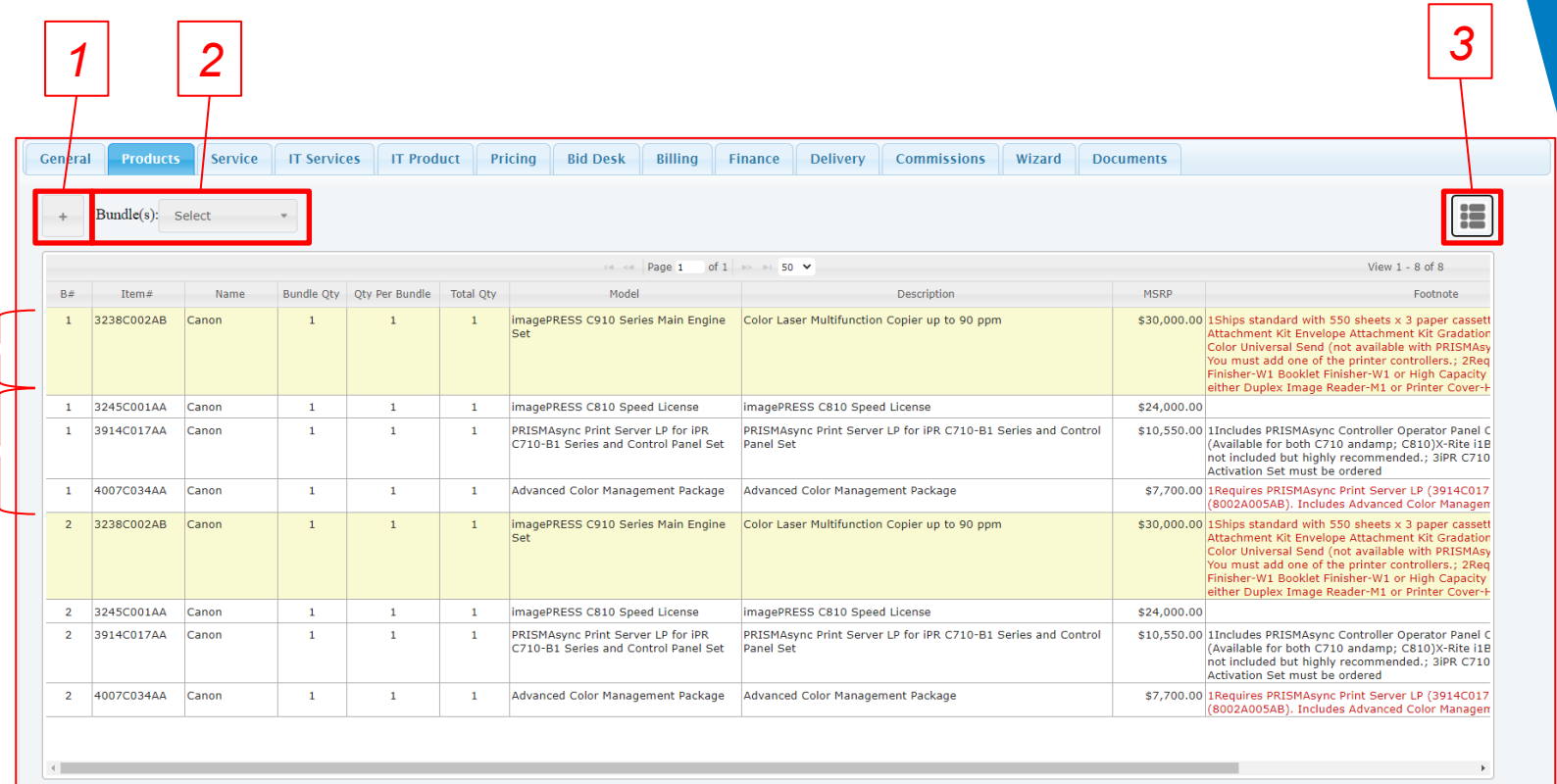
The line-item view provides a table style display of products on a proposal or order.

Key:

- 1) Add a new bundle
- 2) Select a bundle (show only items from the selected bundle)
- 3) Return to the *bundle view*.. (See [Page 102](#))
- 4) Mainframes are displayed in yellow
- 5) Accessories are displayed in white below their mainframes

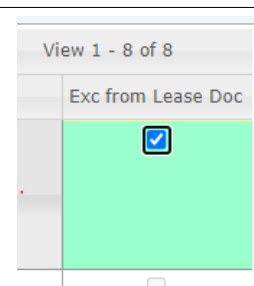
Quick Tips:

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.



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

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



View 1 - 8 of 8
Exc from Lease Doc
<input checked="" type="checkbox"/>

How To: Add Used Equipment to a Proposal or Order

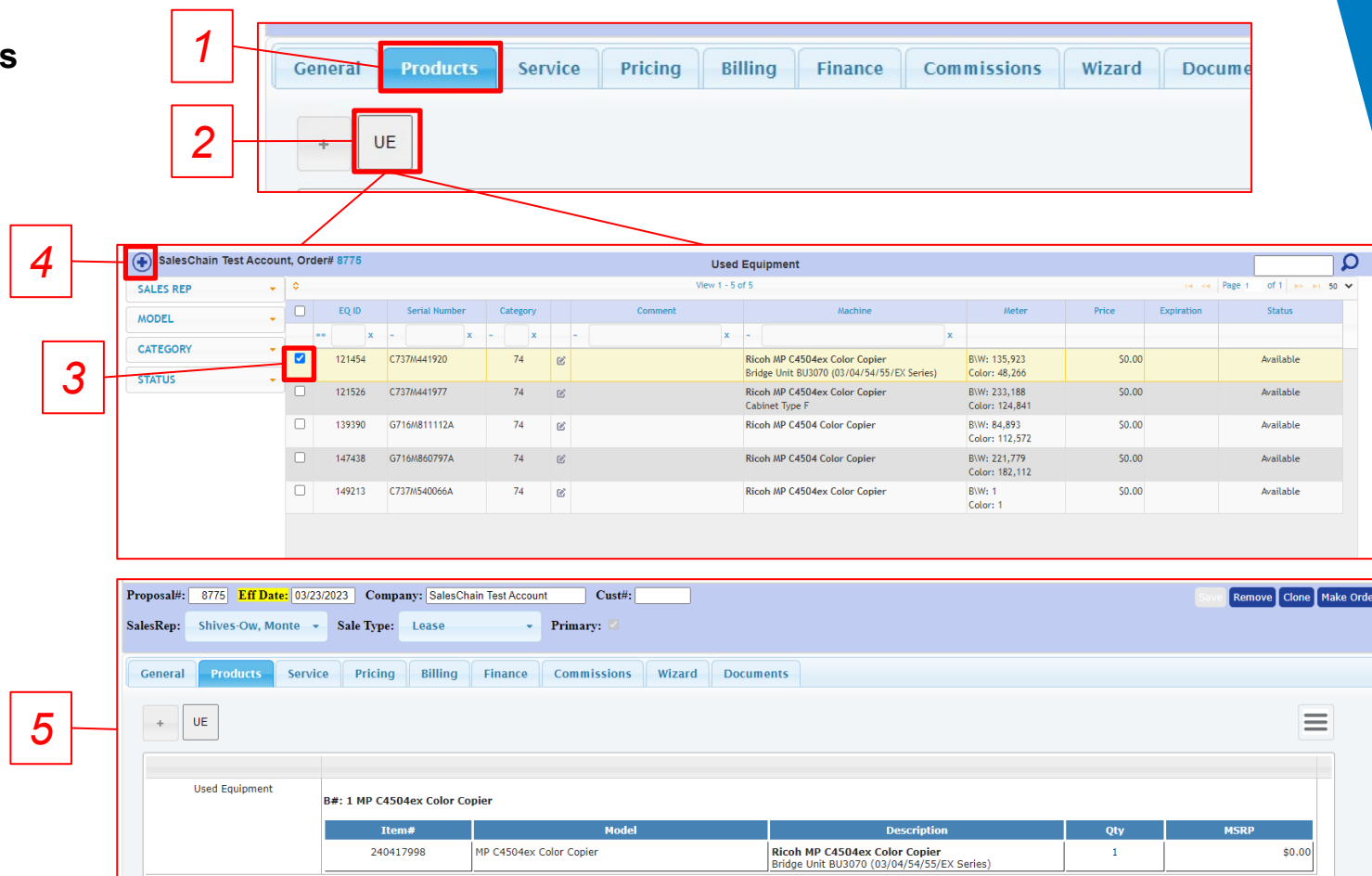
If your business is set up for use of the used equipment desk, it is possible to add use machines to your proposals and orders.

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.



1. Products tab

2. UE button

3. Select machine (checkbox)

4. Add to proposal or order button

5. Used Equipment section

EQ ID	Serial Number	Category	Comment	Machine	Meter	Price	Expiration	Status
121454	C737M441920	74		Ricoh MP C4504ex Color Copier Bridge Unit BU3070 (03/04/54/55/EX Series)	BIW: 135,923 Color: 48,266	\$0.00		Available
121526	C737M441977	74		Ricoh MP C4504ex Color Copier Cabinet Type F	BIW: 233,188 Color: 124,841	\$0.00		Available
139390	G716M811112A	74		Ricoh MP C4504 Color Copier	BIW: 84,893 Color: 112,572	\$0.00		Available
147438	G716M860797A	74		Ricoh MP C4504 Color Copier	BIW: 221,779 Color: 182,112	\$0.00		Available
149213	C737M540066A	74		Ricoh MP C4504ex Color Copier	BIW: 1 Color: 1	\$0.00		Available

Item#	Model	Description	Qty	MSRP
240417998	MP C4504ex Color Copier	Ricoh MP C4504ex Color Copier Bridge Unit BU3070 (03/04/54/55/EX Series)	1	\$0.00

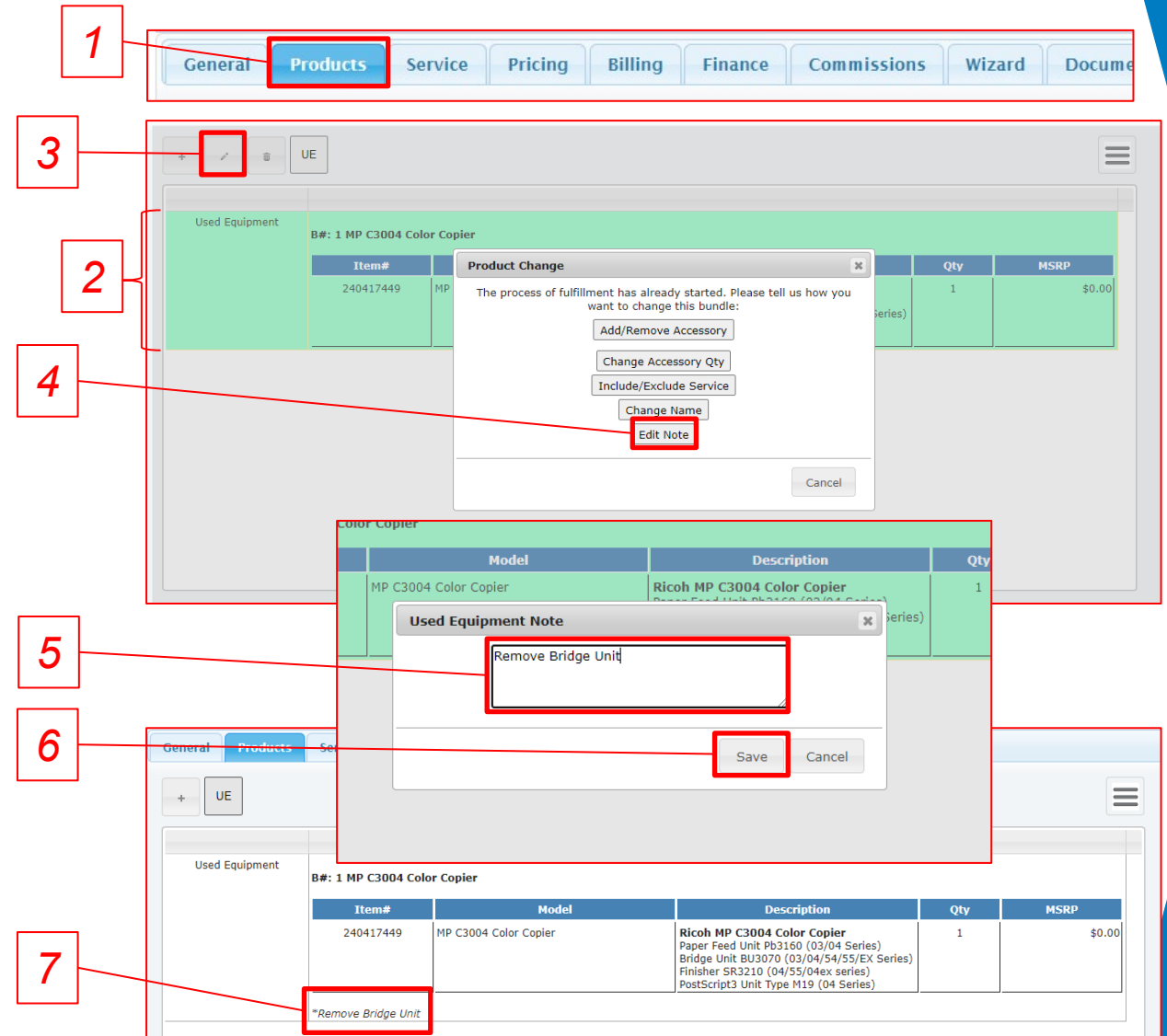
If your business is set up for use of the Used Equipment Desk, it is possible to add a note to used equipment bundles that have been added to proposals or orders.

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.

How To: Add a Note to a Used Equipment 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*

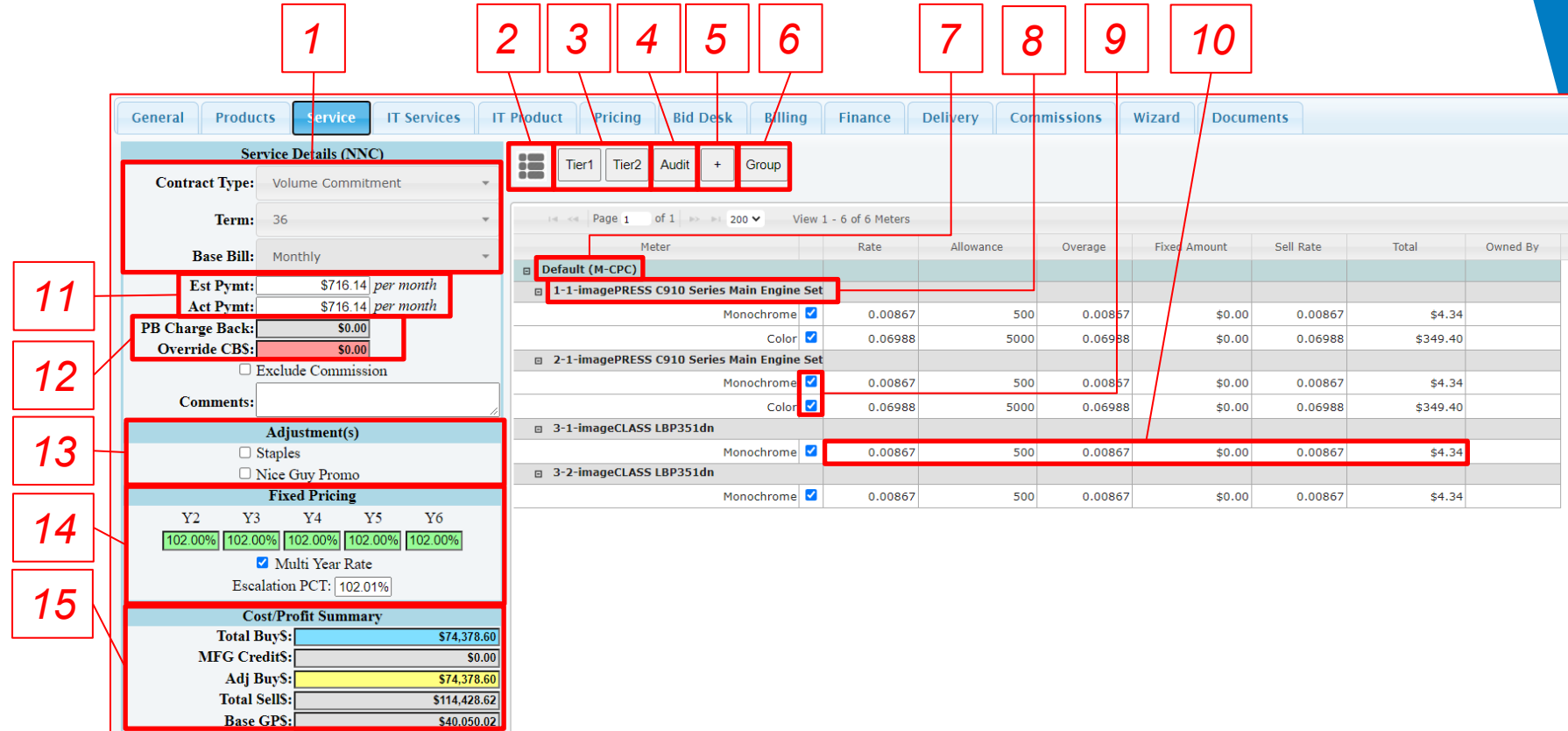
7. Your note will appear below the table of this bundle.

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



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

- 1**: Service Details (NNC) section, including Contract Type, Term, and Base Bill.
- 2**: Pricing tiers (Tier1, Tier2, Audit, +, Group).
- 3**: Service rate input fields (Est Pymt, Act Pymt, PB Charge Back, Override CBS).
- 4**: Audit view toggle.
- 5**: Add zero-cost service item button.
- 6**: Create a new service group button.
- 7**: Service pricing method (Machine level or Blended) and group name.
- 8**: Mainframe name field.
- 9**: Base rate commitment boxes (Y2, Y3, Y4, Y5, Y6).
- 10**: Service details table (Meter, Rate, Allowance, Overage, Fixed Amount, Sell Rate, Total, Owned By).
- 11**: Estimated and Actual Payment value fields.
- 12**: Charge back and override value fields.
- 13**: Adjustments section (Staples, Nice Guy Promo).
- 14**: Fixed Pricing section (Multi Year Rate, Escalation PCT).
- 15**: Cost/profit summary section (Total Buy\$, MFG Credits\$, Adj Buy\$, Total Sell\$, Base GPS\$).

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

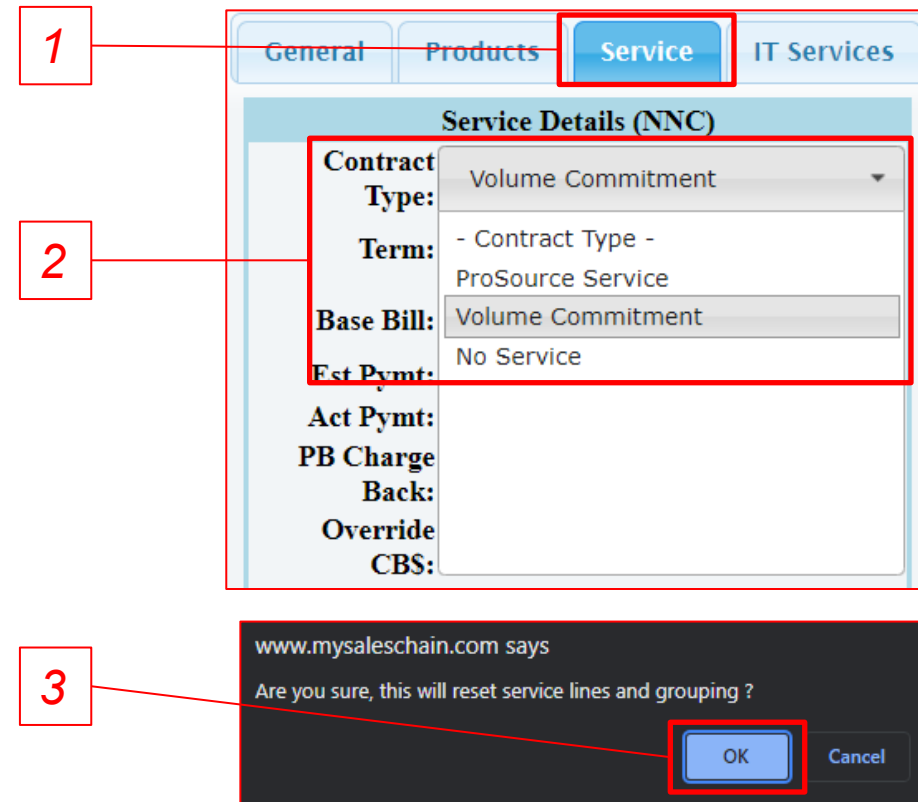
Column	Description
Rate	The dollar value charged to the customer for each page printed by this machine. Color machines will display a black & white and a color rate.
Allowance	The number of prints from this machine allowed to a customer on a monthly basis. Any prints over this value will be charged at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

How To: Change Your Service Contract Type

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

To change your service contract type:

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



The screenshot shows the 'Service Details (NNC)' form. Callout 1 points to the 'Service' tab. Callout 2 points to the 'Contract Type' drop-down menu, which is open and showing 'Volume Commitment' as the selected option. Callout 3 points to the 'OK' button in a confirmation dialog box that says 'www.mysaleschain.com says Are you sure, this will reset service lines and grouping ?'.

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.

1

General	Products	Service	IT Services
---------	----------	----------------	-------------

2

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

3

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

4

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

How To: Price Blended Service

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

To price blended service:

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

Quick Tip:

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

M-CPC

1. **Service** tab selected

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

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

3. **Blended view** button selected. Table shows **Default (M-CPC)** with a red box around the **Color** row's **Allowance** value (5000) and a red box around the **Color** row's **Rate** value (0.06988).

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

4. **Blended view** button selected. Table shows **Default (B-CPC)** with a red box around the **Color** row's **Allowance** value (12000) and a red box around the **Color** row's **Rate** value (0.06988).

Manager override occurred

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

How To: Price a Service Takeover

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

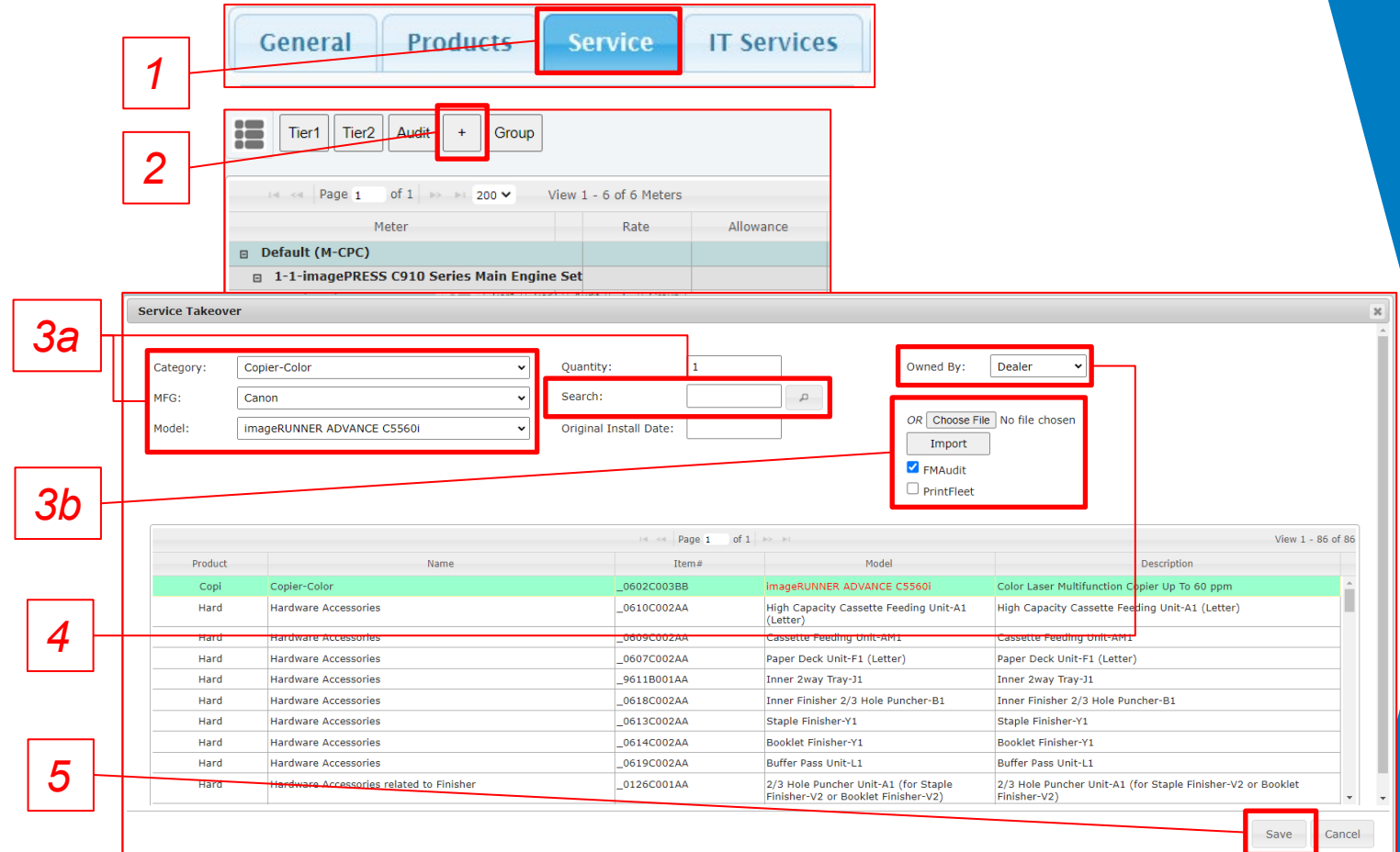
To add a service only item:

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

Quick Tip:

Service takeovers will be highlighted in yellow.

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



The screenshot shows the 'Service Takeover' form in the SalesChain system. Red boxes and numbers indicate the steps for adding a service only item:

- 1**: Points to the 'Service' tab in the top navigation bar.
- 2**: Points to the '+' button in the 'Add' section of the 'Service' tab.
- 3a**: Points to the 'Category' dropdown menu.
- 3b**: Points to the 'Search' input field.
- 4**: Points to the 'Owned By' dropdown menu.
- 5**: Points to the 'Save' button at the bottom right of the form.

The form includes fields for Category, MFG, Model, Quantity, Search, Original Install Date, and Owned By. It also has checkboxes for FMAudit and PrintFleet. A table below the form lists various hardware accessories related to the selected machine.

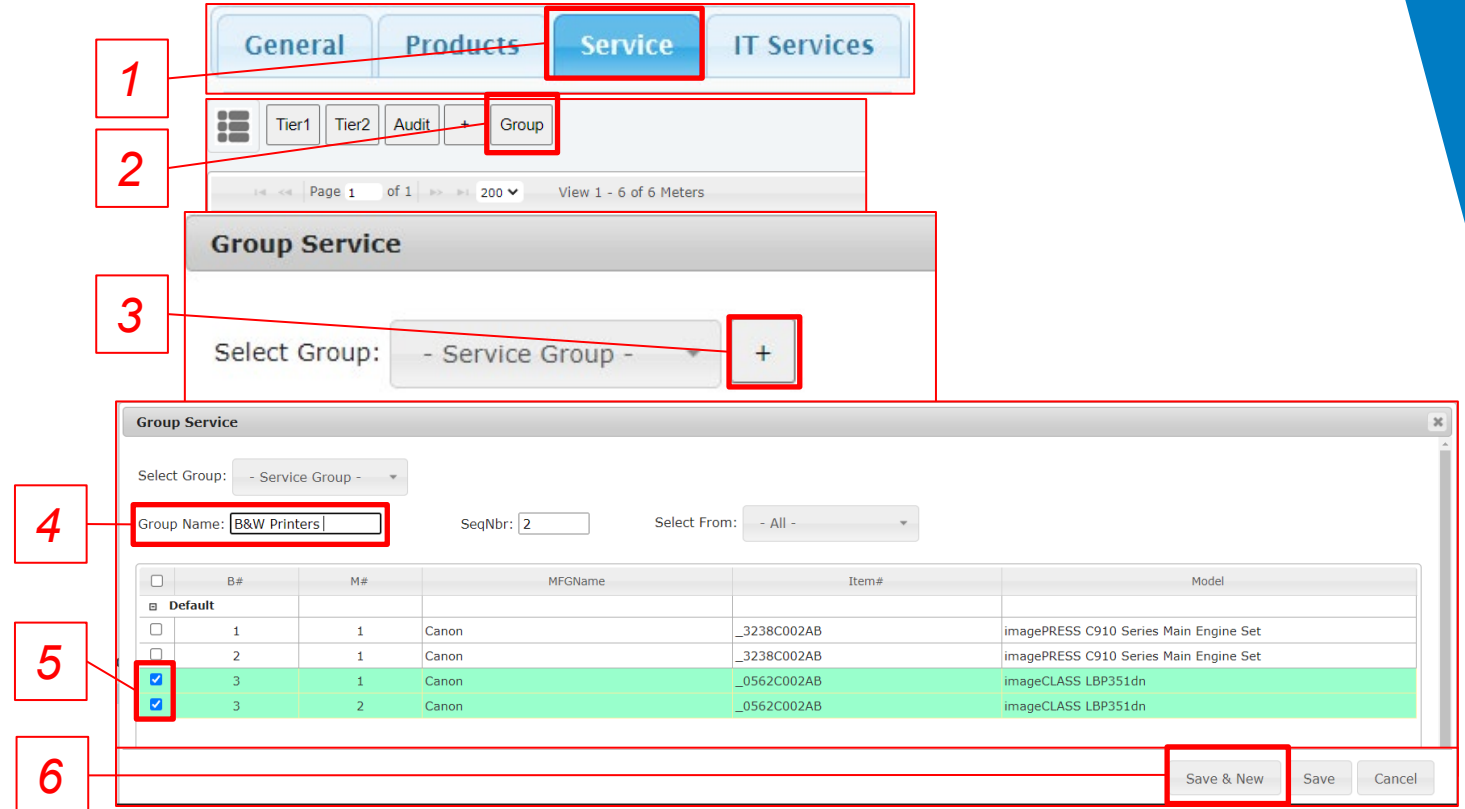
Product	Name	Item#	Model	Description
Copier	Copier-Color	_0602C003BB	ImageRUNNER ADVANCE C5560i	Color Laser Multifunction Copier Up To 60 ppm
Hard	Hardware Accessories	_0610C002AA	High Capacity Cassette Feeding Unit-A1 (Letter)	High Capacity Cassette Feeding Unit-A1 (Letter)
Hard	Hardware Accessories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

How To: Group Machines for Service

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

To create service groups:

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



The screenshot shows the 'Service' tab in the top navigation bar. Below it, the 'Group' button is highlighted. The 'Group Service' dialog box is open, showing the 'Select Group' dropdown set to '- Service Group -'. The 'Group Name' field contains 'B&W Printers'. The 'SeqNbr' field is set to 2. The 'Select From' dropdown is set to '- All -'. A table of machines is displayed with columns B#, M#, MFGName, Item#, and Model. Two rows are selected with checkboxes. The 'Save & New' button is highlighted at the bottom right.

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

Quick Tip:

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

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

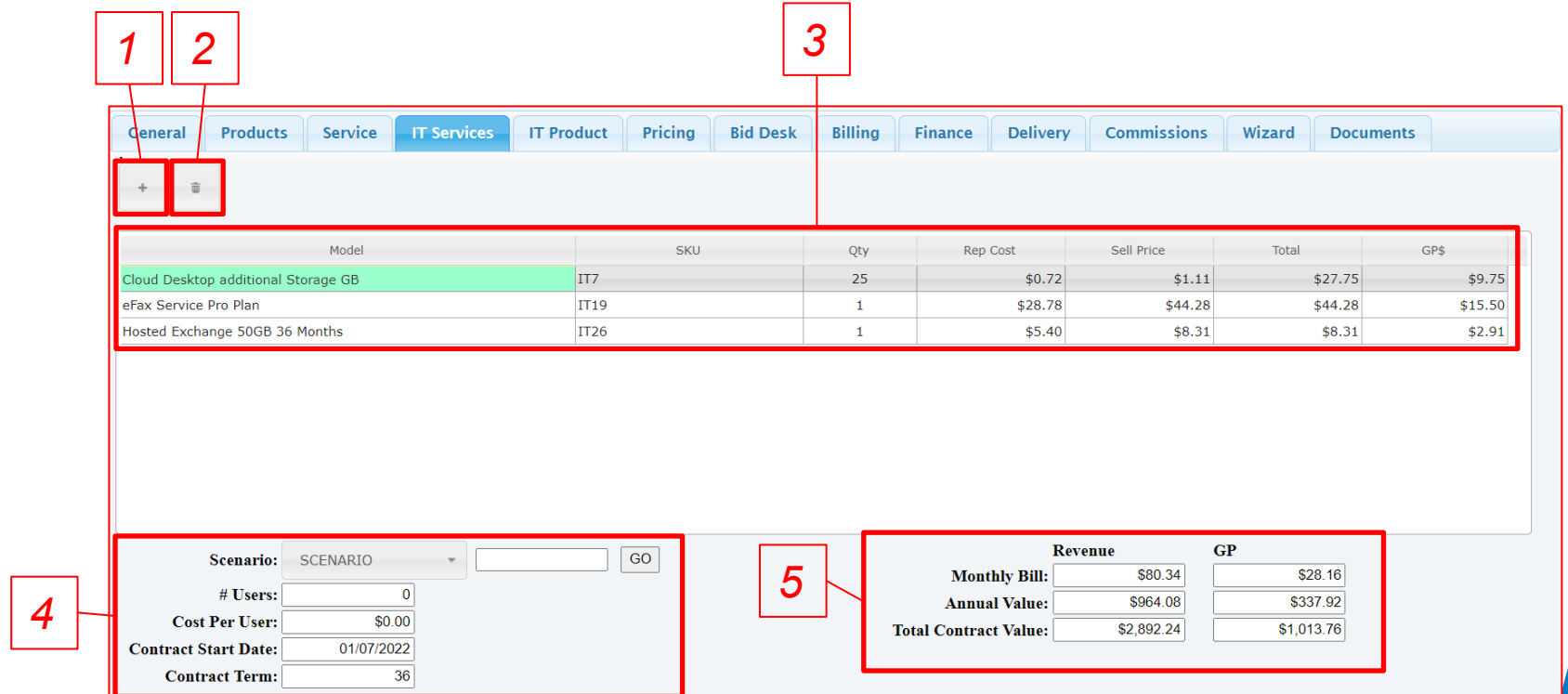
Copiers (M-CPC)	
<input type="checkbox"/> 1-1-imagePRESS C910 Series Main Engine Set	Monochrome <input checked="" type="checkbox"/>
	Color <input checked="" type="checkbox"/>
<input type="checkbox"/> 2-1-imagePRESS C910 Series Main Engine Set	Monochrome <input checked="" type="checkbox"/>
	Color <input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

Proposal and Order Pricing: The IT Services Tab

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

Key:

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



The screenshot shows the 'IT Services' tab selected in the top navigation bar. Below the navigation bar, there are two buttons: a plus sign (+) and a trash can icon. A table lists three IT services: 'Cloud Desktop additional Storage GB', 'eFax Service Pro Plan', and 'Hosted Exchange 50GB 36 Months'. At the bottom, there is a 'Scenario Pricing Tool' section with input fields for users, cost per user, contract start date, and contract term. To the right of this tool is a 'Cost/profit summary' section showing revenue and gross profit (GP) for monthly, annual, and total contract values.

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

Scenario:	SCENARIO	GO
# Users:	0	
Cost Per User:	\$0.00	
Contract Start Date:	01/07/2022	
Contract Term:	36	

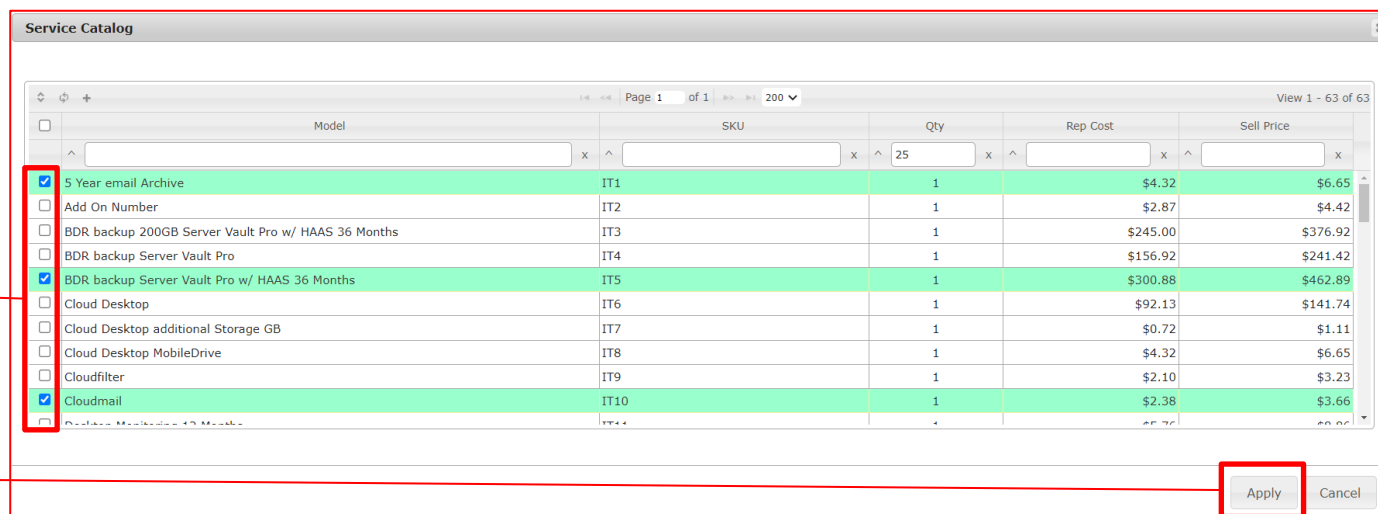
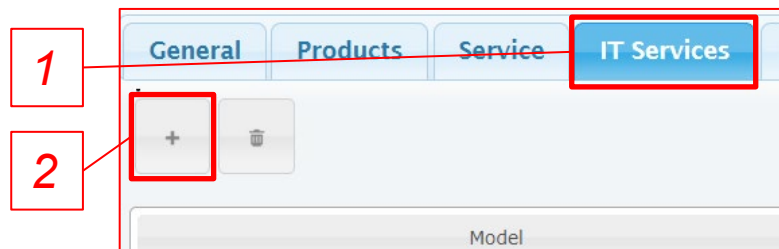
	Revenue	GP
Monthly Bill:	\$80.34	\$28.16
Annual Value:	\$964.08	\$337.92
Total Contract Value:	\$2,892.24	\$1,013.76

How To: Add IT Services To A Proposal or Order

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

To add an IT service item:

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



Quick Tips:

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

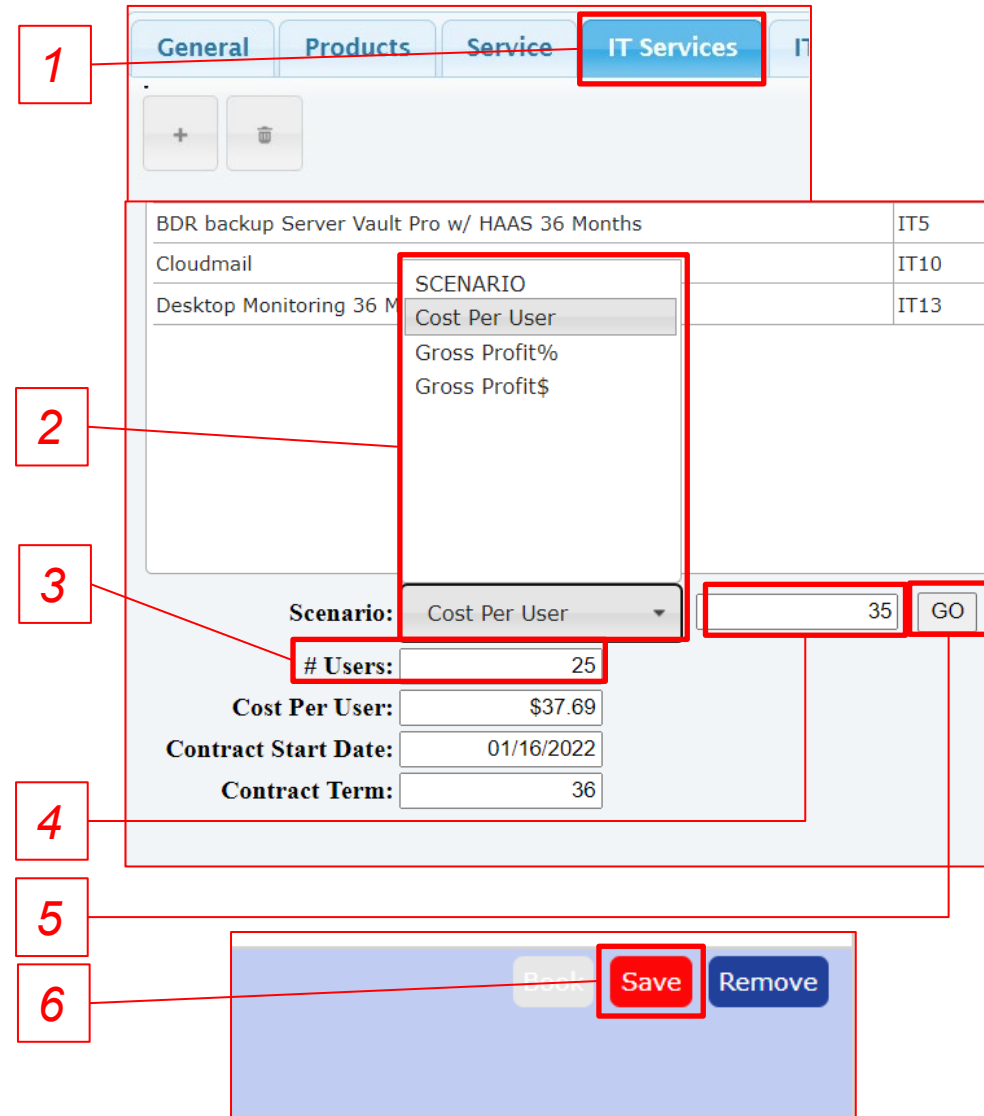
Model	SKU	Qty	Rep Cost
5 Year email Archive	IT1	25	\$4.32
BDR backup Server Vault Pro w/ HAAS 36 Months	IT5	1	\$300.88
Cloudmail	IT10	1	\$2.38
Desktop Monitoring 36 Months	IT13	1	\$5.76

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.



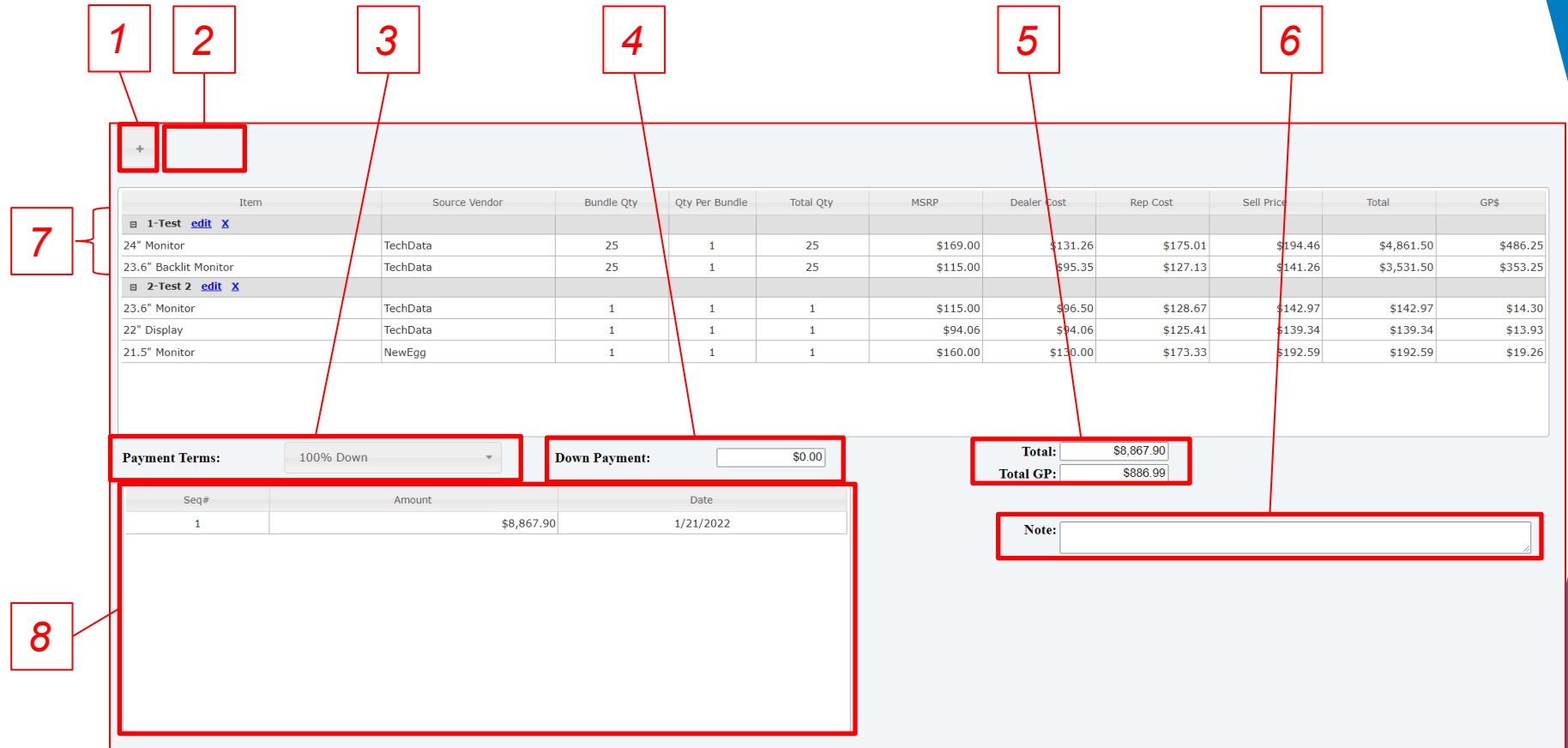
The screenshot shows the 'IT Services' tab selected. A table lists services: BDR backup Server Vault Pro w/ HAAS 36 Months (IT5), Cloudmail (IT10), and Desktop Monitoring 36 M (IT13). A 'SCENARIO' dropdown menu is open, showing options: Cost Per User (selected), Gross Profit%, and Gross Profit\$. Below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

Proposal and Order Pricing: The IT Products Tab

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

Key:

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



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

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

Payment Terms: 100% Down Down Payment: \$0.00

Total: \$8,867.90 Total GP: \$886.99

Note:

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

Proposal & Order Pricing: Pricing Tab

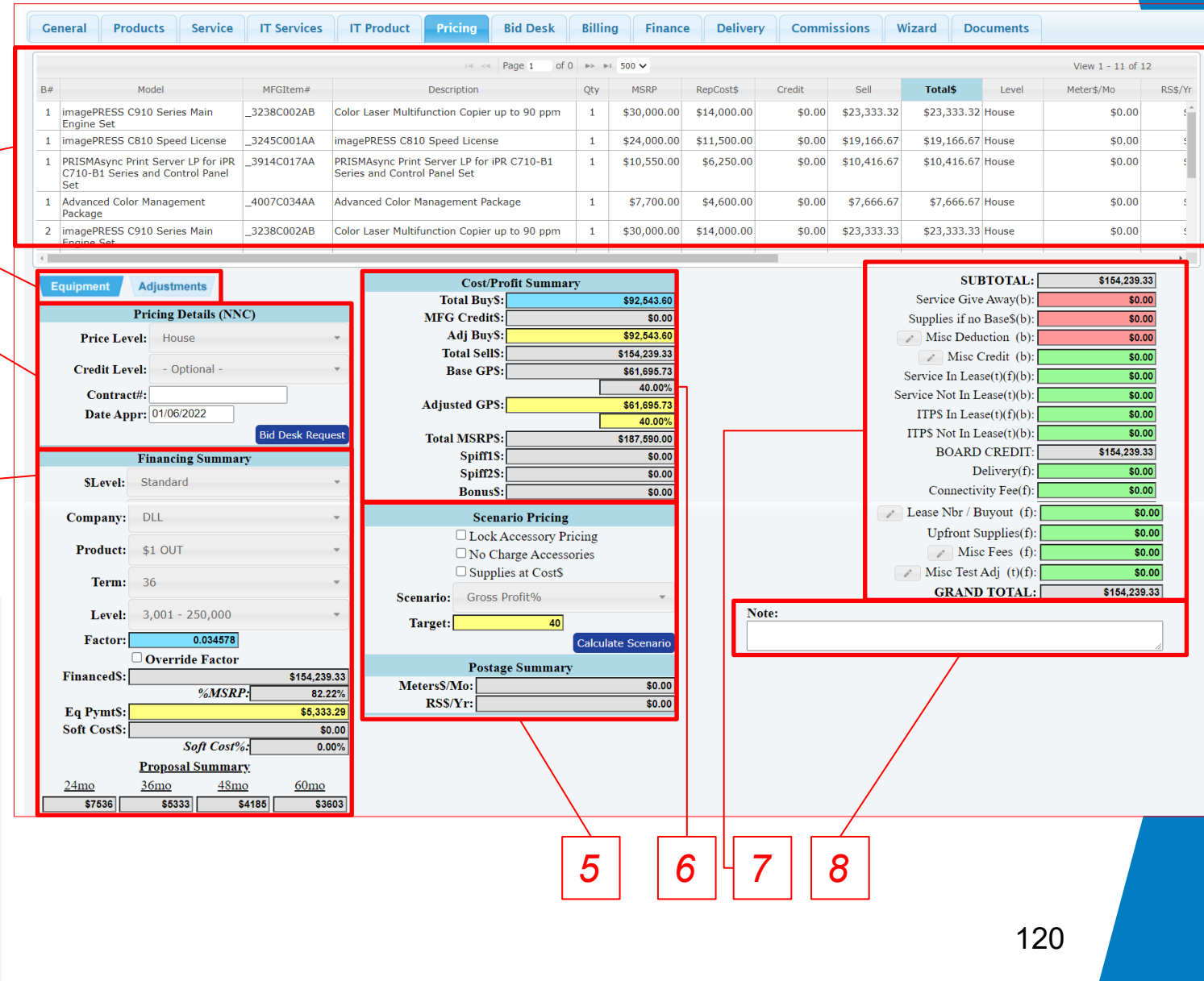
The *Pricing Tab* serves as a subtotal page that provides details and summaries regarding the given contract.

Key:

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

Quick Tip:

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



The screenshot shows the 'Pricing' tab in the SalesChain software. The interface is divided into several sections, each highlighted with a red box and a numbered callout:

- 1**: Equipment or Adjustments Summary Table (Main table listing items like imagePRESS C910 Series Main Engine Set, imagePRESS C810 Speed License, etc.)
- 2**: Select Equipment or Adjustments View (Buttons for 'Equipment' and 'Adjustments')
- 3**: Pricing Details (Form for Price Level, Credit Level, Contract#, Date Appr.)
- 4**: Financing Summary (Form for SLevel, Company, Product, Term, Level, Factor)
- 5**: Scenario Pricing (Form for Lock Accessory Pricing, No Charge Accessories, Supplies at Cost\$, Scenario, Target)
- 6**: Cost/Profit Summary (Summary of Total Buy\$, MFG Credit\$, Adj Buy\$, Total Sell\$, Base GPS, Adjusted GPS, Total MSRP\$, Spiff1\$, Spiff2\$, Bonus\$)
- 7**: Soft costs (entry and Summary) (Form for Soft Cost%, Proposal Summary)
- 8**: Add a note to this deal (Internal Only) (Text area for 'Note:')
- 9**: Service Summary (Form for Contract Type, Base Bill, Term, Base Mo Pymt\$, Total Value\$, Overage Bill, Fixed Amt\$, Start Date)
- 10**: IT Services Summary (Form for Billing, Monthly\$, Annual\$, Term)
- 11**: IT Product Summary (Form for Pymt Terms, Total)

At the bottom right, there is a 'SUBTOTAL' and 'GRAND TOTAL' section showing a total of \$154,239.33.

How to: Change Values in the Equipment Subtab

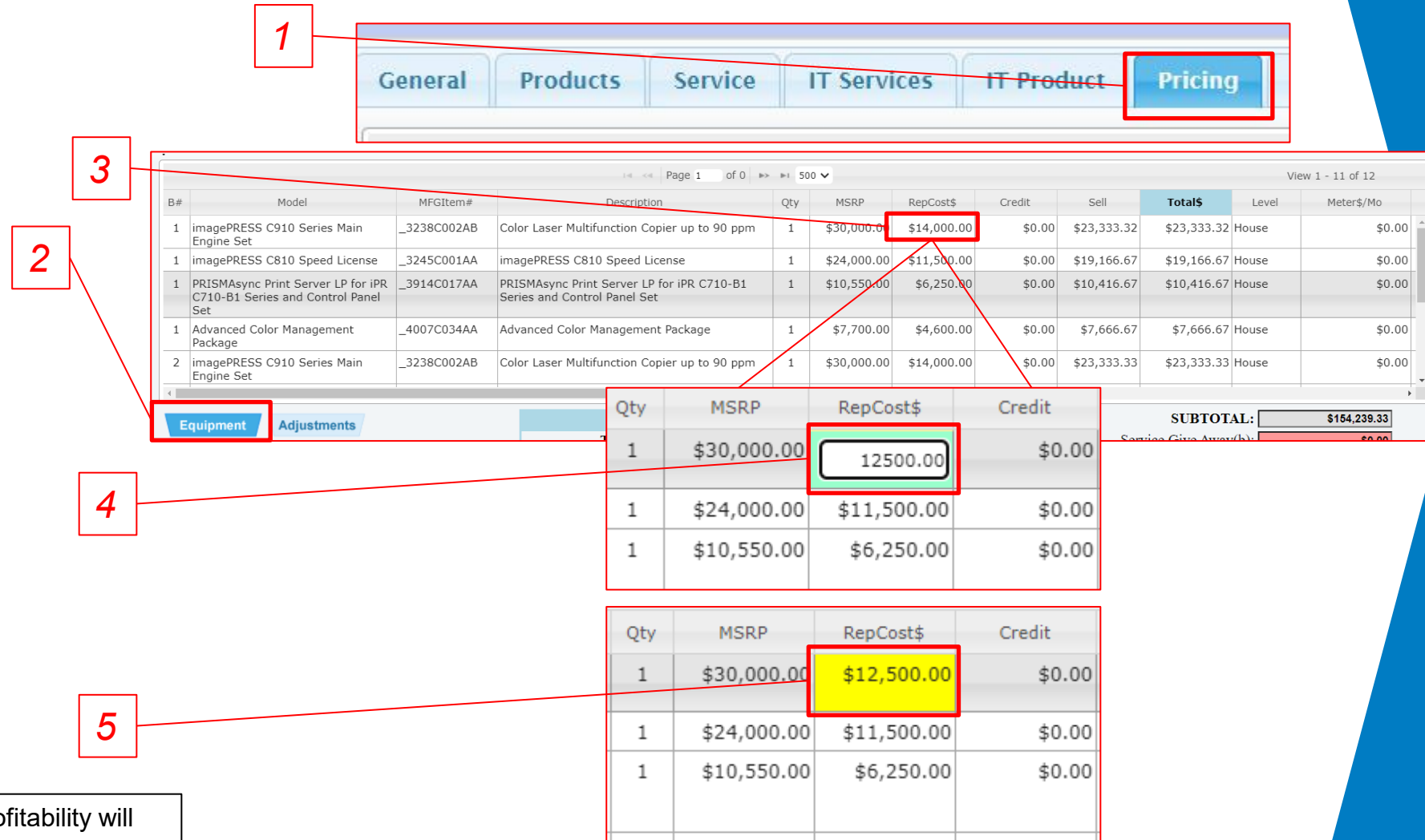
The *Equipment* subtab provides information regarding equipment cost. **Important: Only users with designated permission can change certain values in this table.**

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.



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

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

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

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

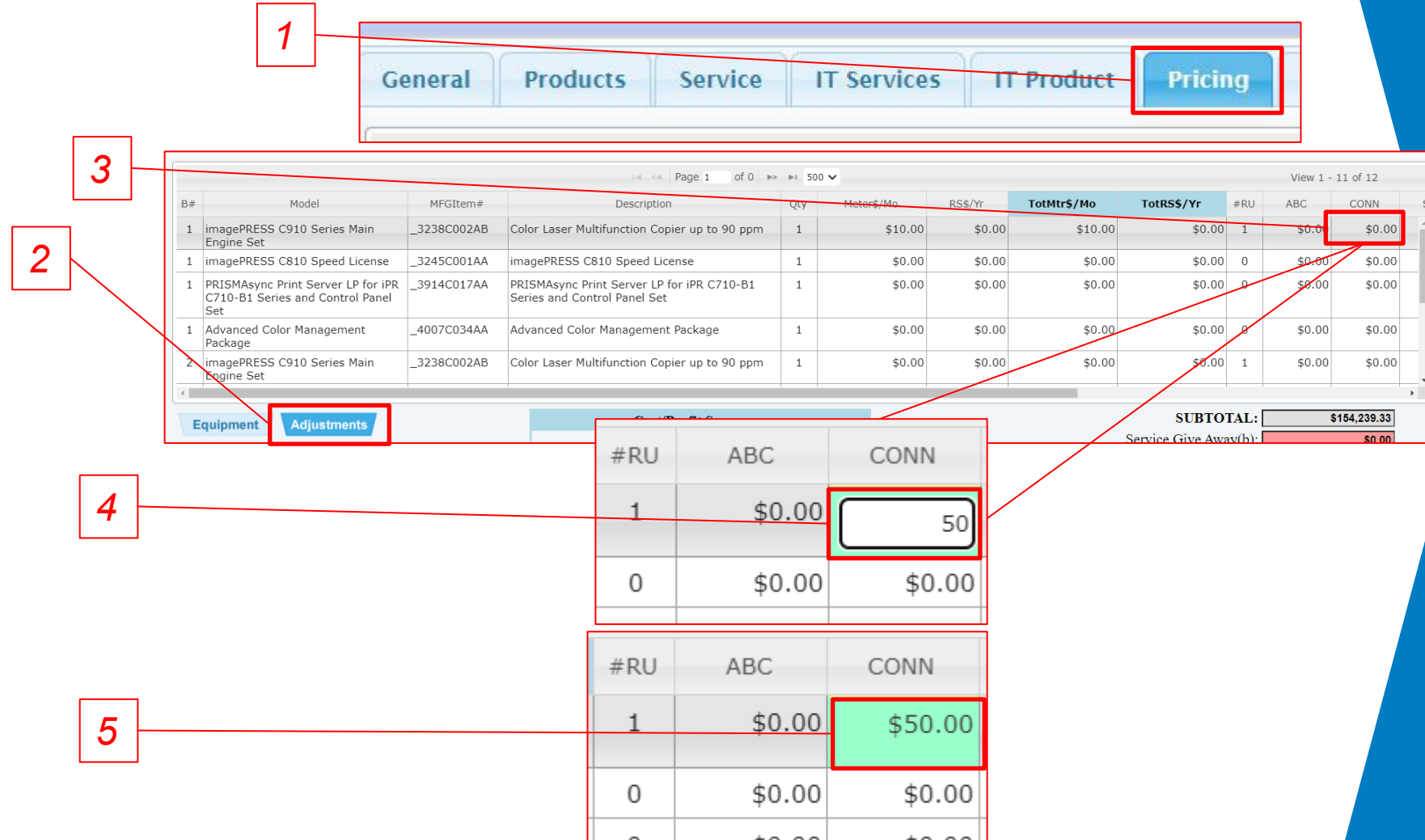
SUBTOTAL: \$154,239.33

How to: Change Values in the Adjustments Subtab

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

To change values in the *Adjustments* subtab:

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



The screenshot shows the SalesChain interface with the Pricing tab selected. The Adjustments subtab is active, displaying a table of items with columns for B#, Model, MFGItem#, Description, Qty, Meters/Mo, RSS/Yr, TotMtr\$/Mo, TotRSS/Yr, #RU, ABC, and CONN. The table lists several items, including imagePRESS C910 Series Main Engine Set, imagePRESS C810 Speed License, PRISMAsync Print Server LP for iPR C710-B1 Series and Control Panel Set, and Advanced Color Management Package.

Red boxes and numbers 1-5 indicate the steps to change a value in the Adjustments subtab:

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

The table shows the following data:

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

The SUBTOTAL is \$154,239.33. The Service Give Away(h) is \$0.00.

The Adjustments subtab shows the following data:

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

The Adjustments subtab shows the following data:

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

How to: Change a Deal's Price Level

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

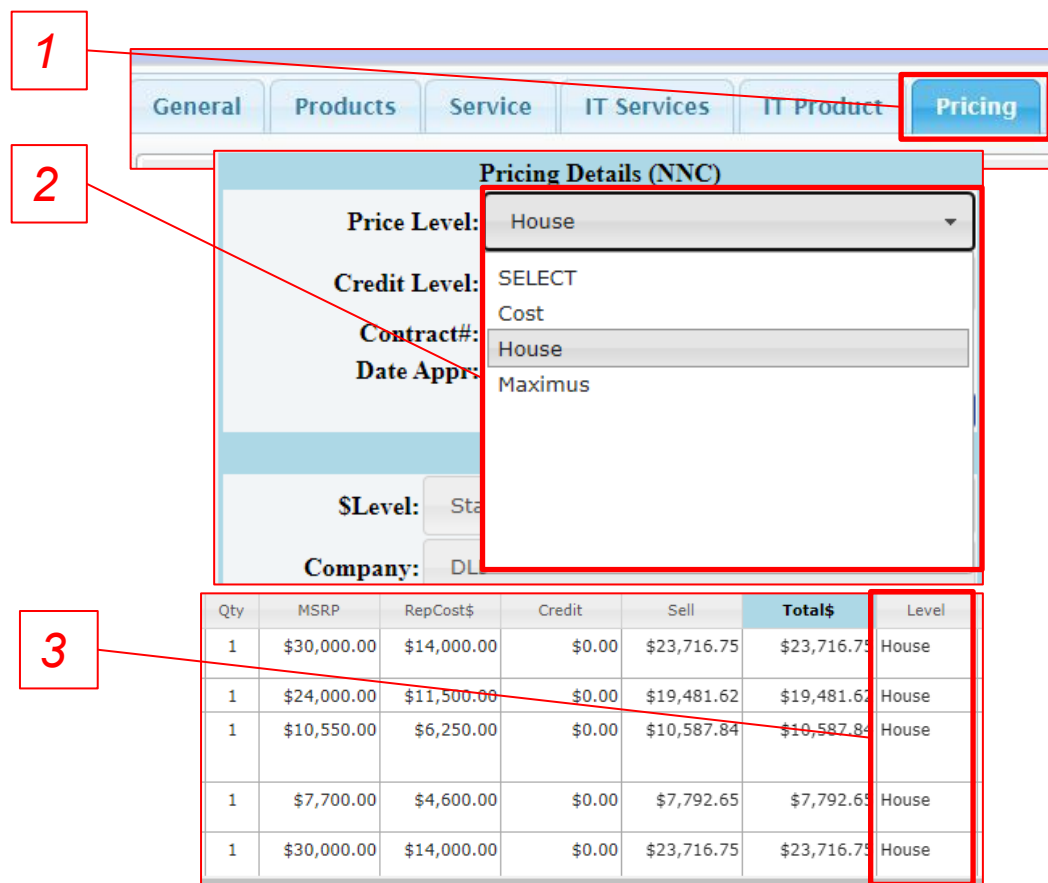
Important: If no pricing data for a selected pricing level exists for certain equipment on the deal, the price level might not change. Consult the Equipment subtab (per step 3 below) to see what price level machines are being priced at.

To change a proposal or order's price level:

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

Quick Tip:

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



The screenshot shows the 'Pricing Details (NNC)' window. Callout 1 points to the 'Pricing' tab in the top navigation bar. Callout 2 points to the 'Price Level' dropdown menu, which is currently set to 'House'. Callout 3 points to the 'Level' column in the equipment table below.

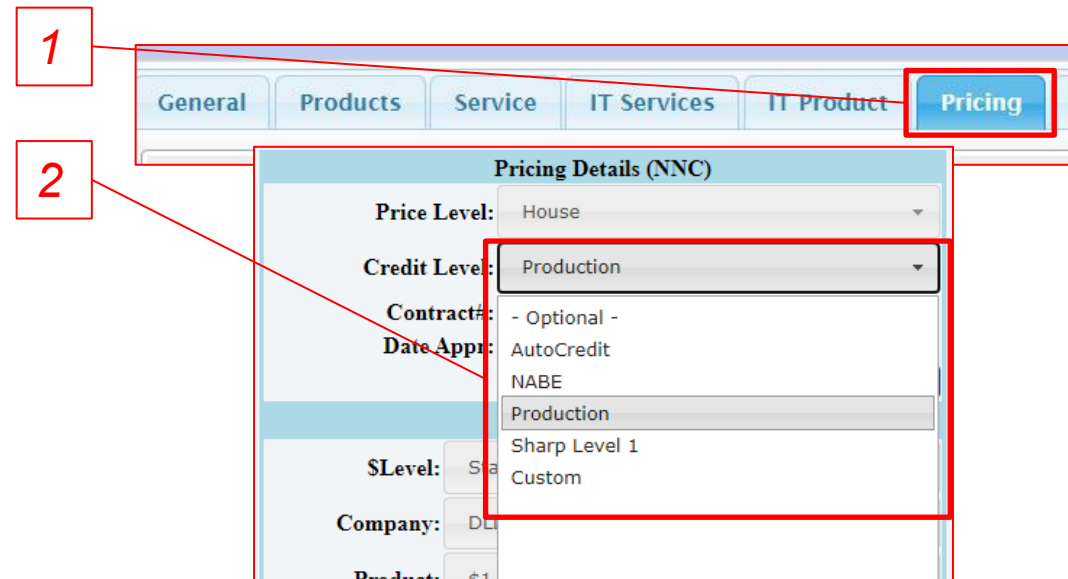
Qty	MSRP	RepCost\$	Credit	Sell	Total\$	Level
1	\$30,000.00	\$14,000.00	\$0.00	\$23,716.75	\$23,716.75	House
1	\$24,000.00	\$11,500.00	\$0.00	\$19,481.62	\$19,481.62	House
1	\$10,550.00	\$6,250.00	\$0.00	\$10,587.84	\$10,587.84	House
1	\$7,700.00	\$4,600.00	\$0.00	\$7,792.65	\$7,792.65	House
1	\$30,000.00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

How to: Change a Deal's Credit Level

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

To change a proposal or order's credit level:

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



Quick Tip:

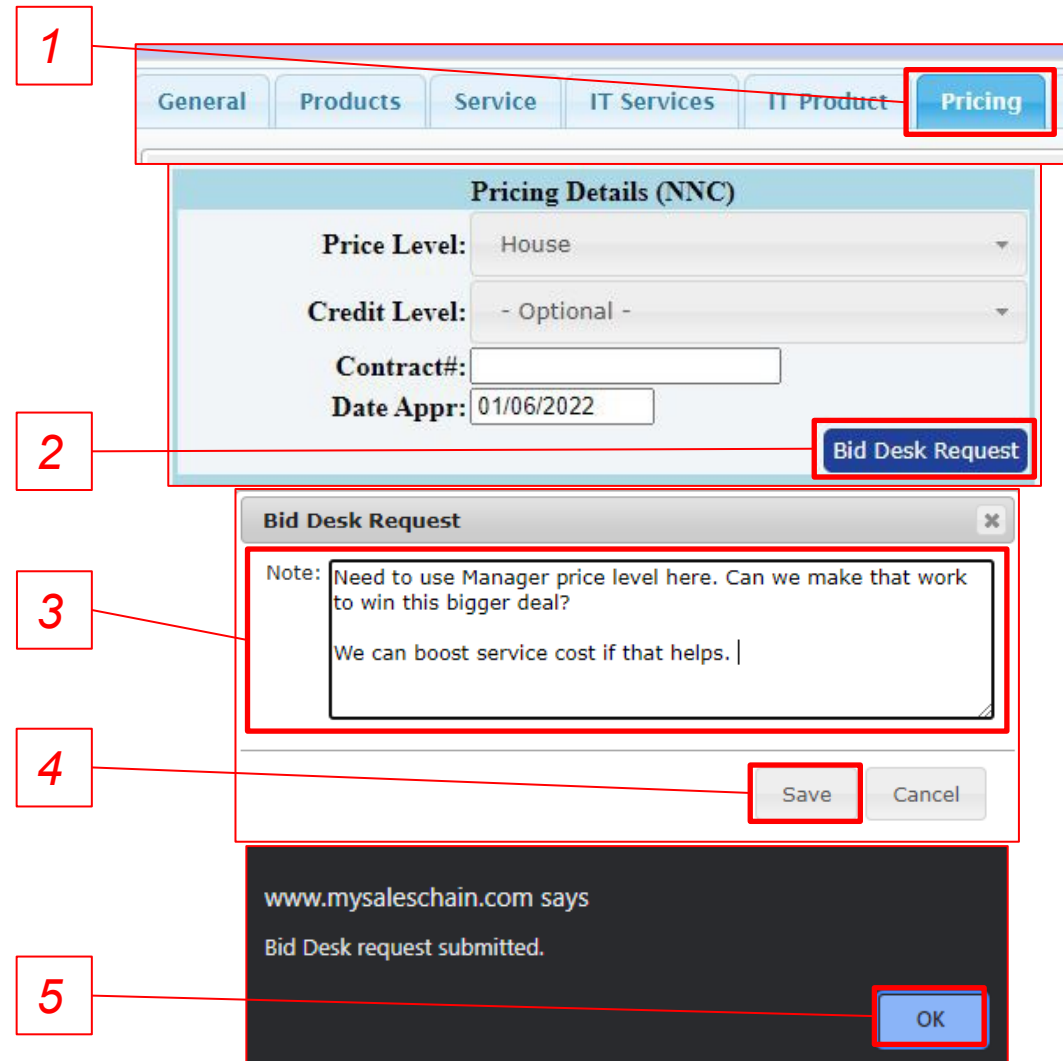
Credit levels can be permissioned so that only certain users have access to certain price levels, like manager discounts. Contact your system administrator if there is a credit level that you are not seeing and should have access to or submit a bid desk request ([page 125](#)) if you need a deal priced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



1. Click on the Pricing tab

2. In the *Pricing Details* section, click on the *Bid 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.

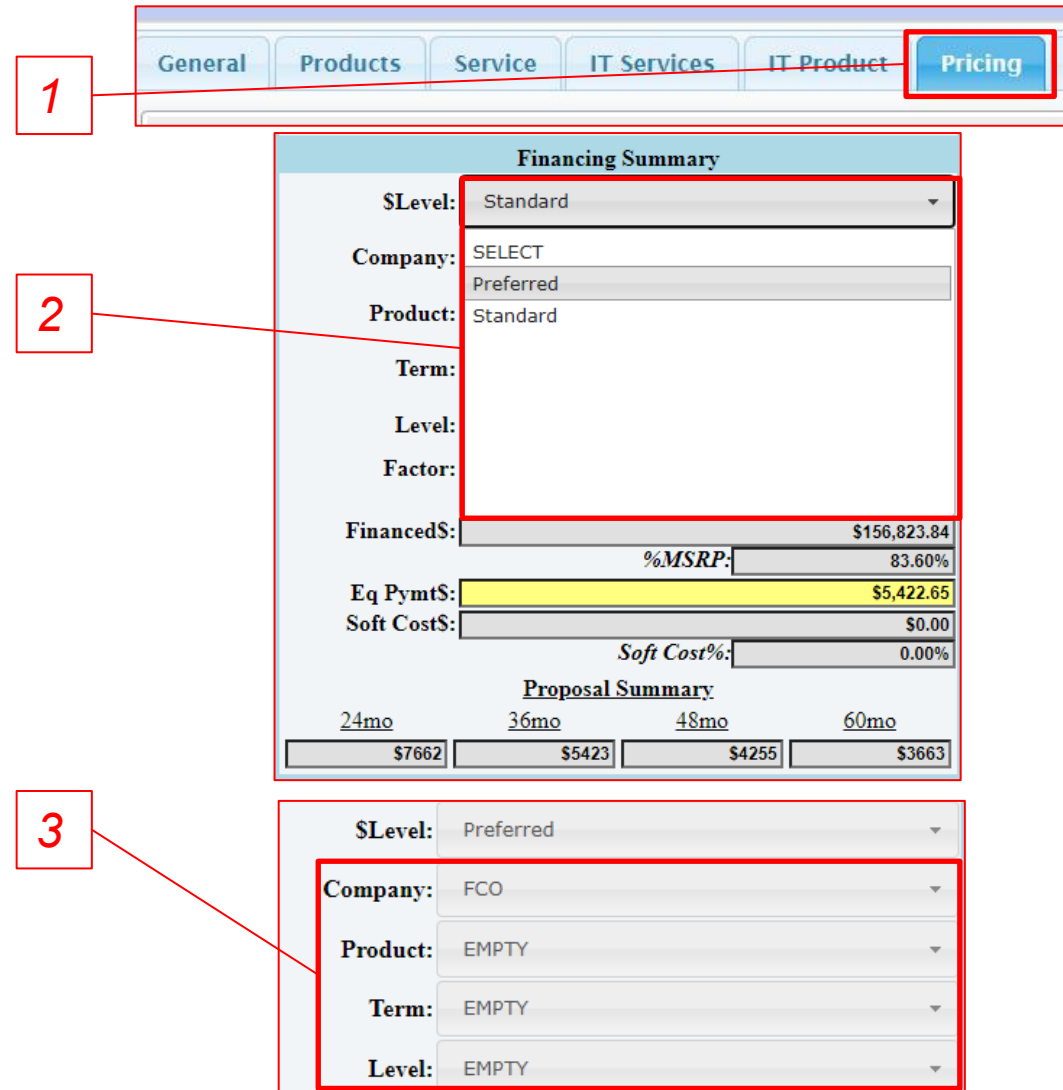
Important: If you change the \$Level, you will need to re-select the company, product, term, level and factor.

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.



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*

Financing Summary				
\$Level:	Standard			
Company:	SELECT			
Product:	Standard			
Term:				
Level:				
Factor:				
Financed\$:	\$156,823.84			
%MSRP:	83.60%			
Eq Pymt\$:	\$5,422.65			
Soft Cost\$:	\$0.00			
Soft Cost%:	0.00%			
Proposal Summary				
24mo	36mo	48mo	60mo	
\$7662	\$5423	\$4255	\$3663	

\$Level:	Preferred
Company:	FCO
Product:	EMPTY
Term:	EMPTY
Level:	EMPTY

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

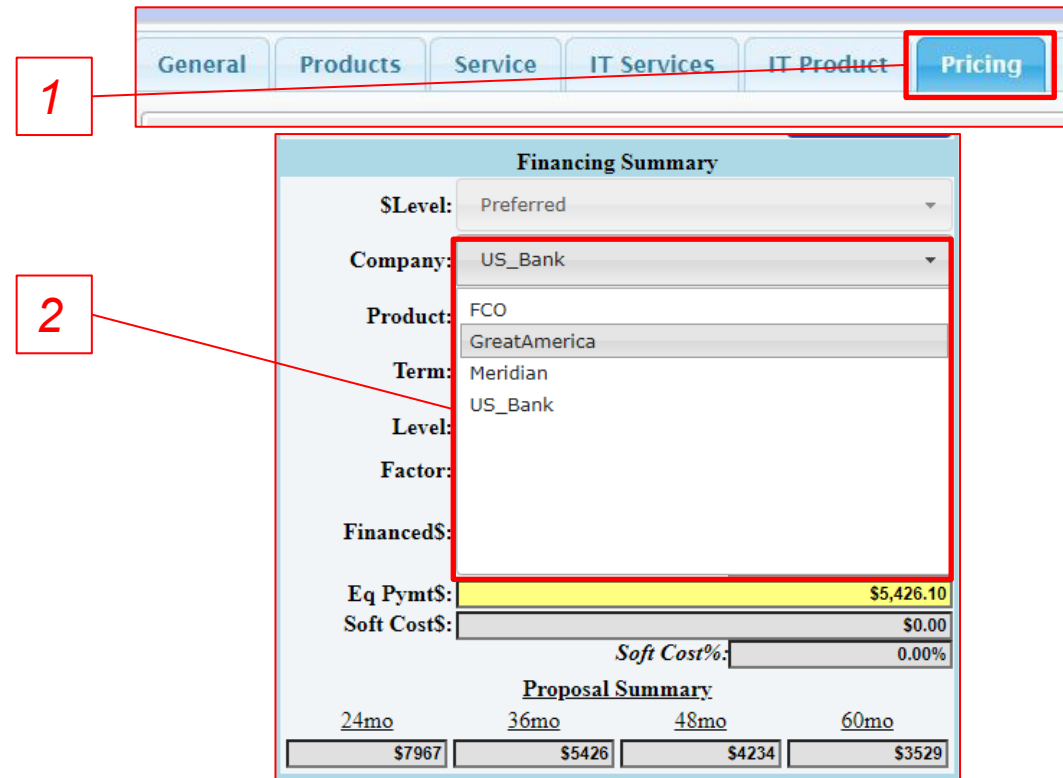
To change a deal's financing company:

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

Quick Tip:

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

How to: Change a Deal's Financing Company



The screenshot shows the SalesChain interface with the following elements:

- Navigation Tabs:** General, Products, Service, IT Services, IT Product, and Pricing. The Pricing tab is highlighted with a red box labeled '1'.
- Financing Summary Section:**
 - SLevel:** Preferred
 - Company:** US_Bank (highlighted with a red box labeled '2')
 - Product:** FCO
 - Term:** Meridian
 - Level:** US_Bank
 - Factor:**
 - Financed\$:**
 - Eq Pymt\$:** \$5,426.10
 - Soft Cost\$:** \$0.00
 - Soft Cost%:** 0.00%
- Proposal Summary Table:**

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

How to: Change a Deal's Lease Product

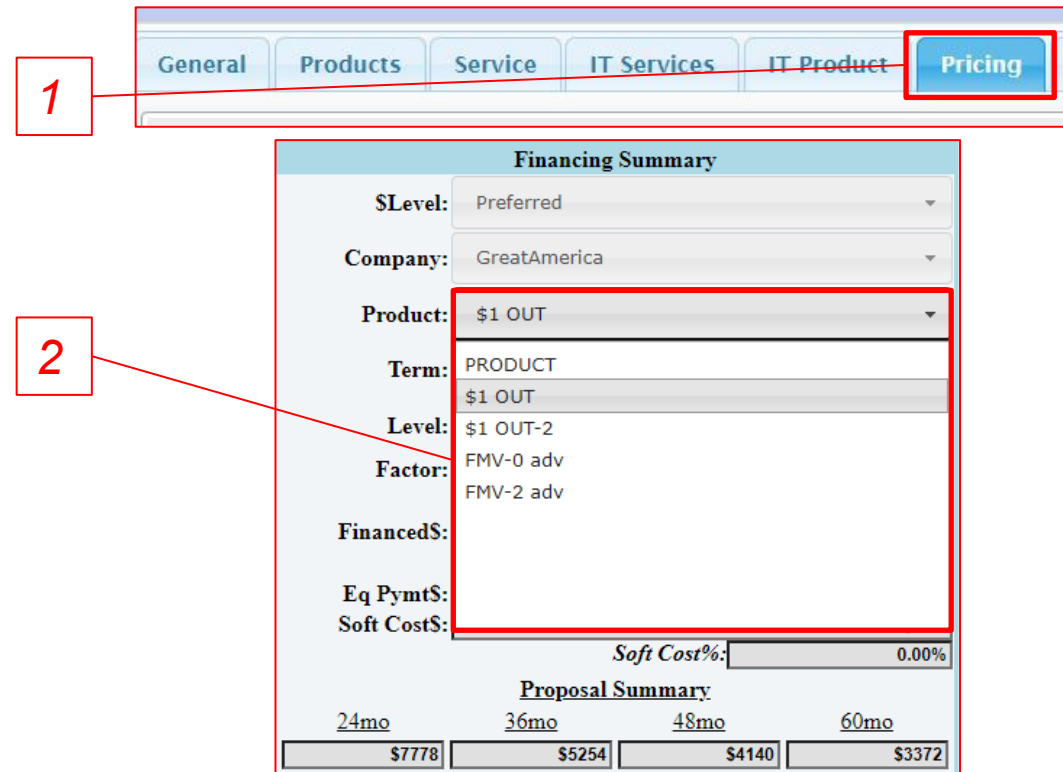
The *Financing Summary* section of the pricing tab allows you to change the leasing product you would like to employ on a leased proposal or order.

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.



The screenshot shows the SalesChain interface with the following elements:

- Navigation Tabs:** General, Products, Service, IT Services, IT Product, Pricing (highlighted with a red box and label '1').
- Financing Summary Section:**
 - SLevel:** Preferred
 - Company:** GreatAmerica
 - Product:** \$1 OUT (highlighted with a red box and label '2')
 - Term:** PRODUCT
 - Level:** \$1 OUT-2
 - Factor:** FMV-0 adv, FMV-2 adv
 - FinancedS:**
 - Eq Pymt\$:**
 - Soft Cost\$:**
 - Soft Cost%:** 0.00%
- Proposal Summary Table:**

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

How to: Change a Deal's Lease Term

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

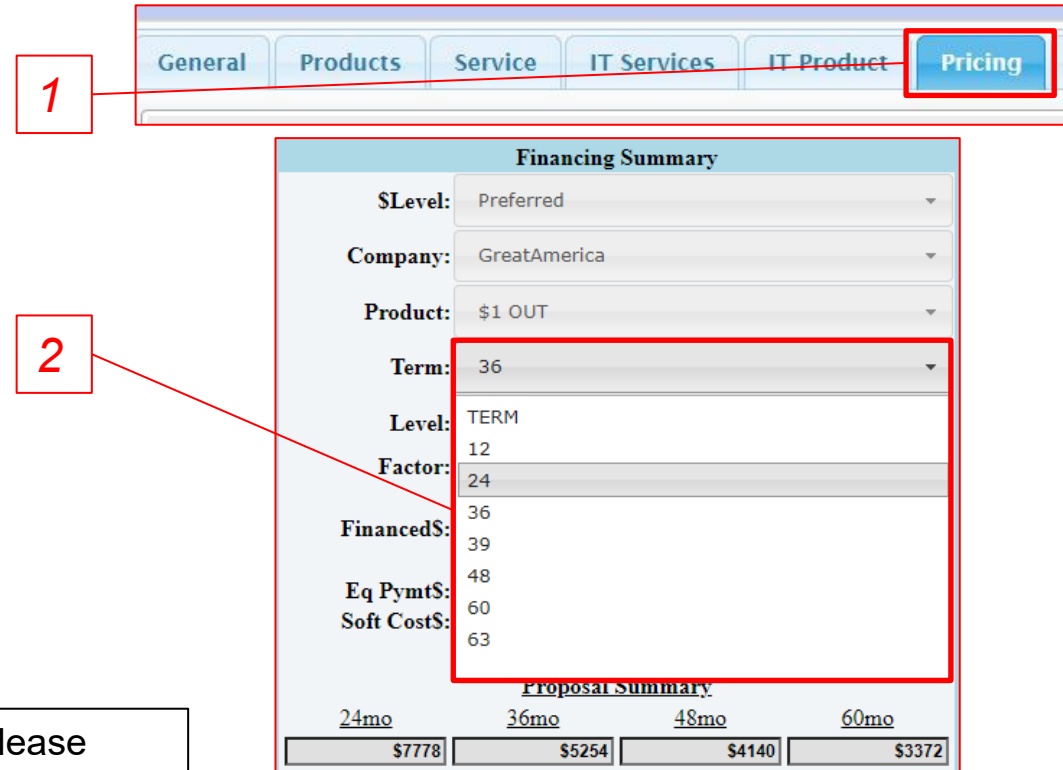
Note: the lease term which you select here will be used by the scenario pricing tool when you calculate monthly lease payment, and it will appear on proposals and other generated paperwork.

To change a proposal or order's lease term:

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

Quick Tips:

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

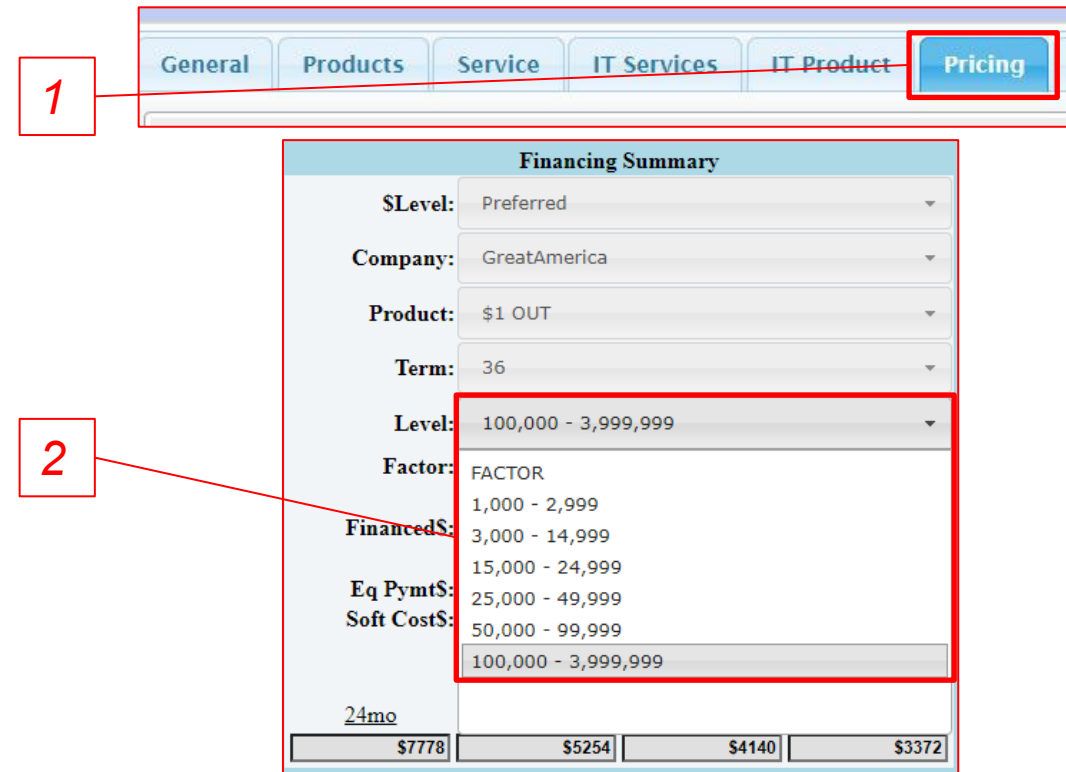


The screenshot shows the SalesChain interface with the Pricing tab selected. The Financing Summary section is visible, showing fields for SLevel, Company, Product, Term, Level, Factor, Financed\$, Eq Pymt\$, and Soft Cost\$. The Term dropdown menu is open, showing options: 12, 24, 36, 39, 48, 60, and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

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

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

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



1

2

Financing Summary			
SLevel:	Preferred		
Company:	GreatAmerica		
Product:	\$1 OUT		
Term:	36		
Level:	100,000 - 3,999,999		
Factor:	FACTOR		
Financed\$:	1,000 - 2,999		
	3,000 - 14,999		
	15,000 - 24,999		
Eq Pymt\$:	25,000 - 49,999		
Soft Cost\$:	50,000 - 99,999		
	100,000 - 3,999,999		
24mo			
	\$7778	\$5254	\$4140
			\$3372

Quick Tip:

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

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

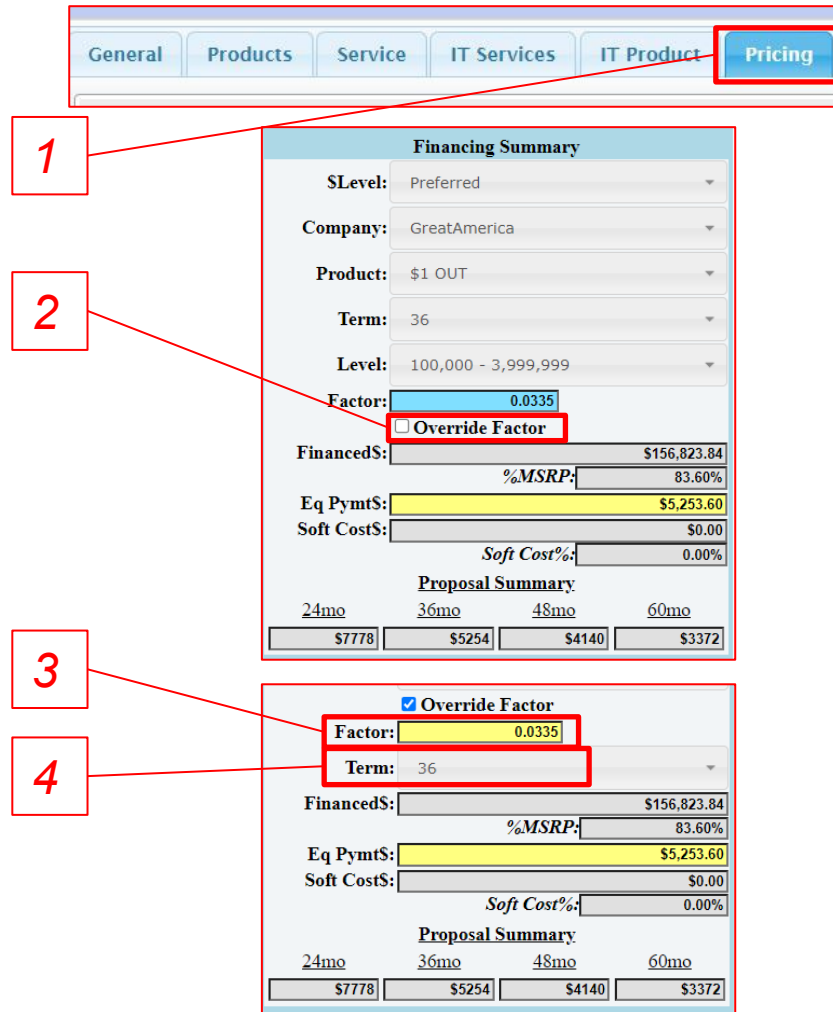
To change a proposal or order's lease rate factor:

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

Quick Tip:

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

How to: Override a Deal's Lease Rate Factor



The screenshot shows the SalesChain interface with the Pricing tab selected. The Financing Summary section is visible, showing various fields for financing details. Red boxes and numbers 1-4 indicate the steps to override the 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

The *Financing Summary* section displays the following information:

- SLevel:** Preferred
- Company:** GreatAmerica
- Product:** \$1 OUT
- Term:** 36
- Level:** 100,000 - 3,999,999
- Factor:** 0.0335
- ☒ **Override Factor**
- Financed\$:** \$156,823.84
- %MSRP:** 83.60%
- Eq Pymt\$:** \$5,253.60
- Soft Cost\$:** \$0.00
- Soft Cost%:** 0.00%
- Proposal Summary:**
- 24mo:** \$7778
- 36mo:** \$5254
- 48mo:** \$4140
- 60mo:** \$3372

The *Factor* text box is highlighted in yellow, and the *Term* drop-down is set to 36.

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.

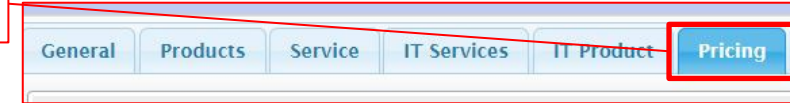
To change a deal's service billing interval:

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:

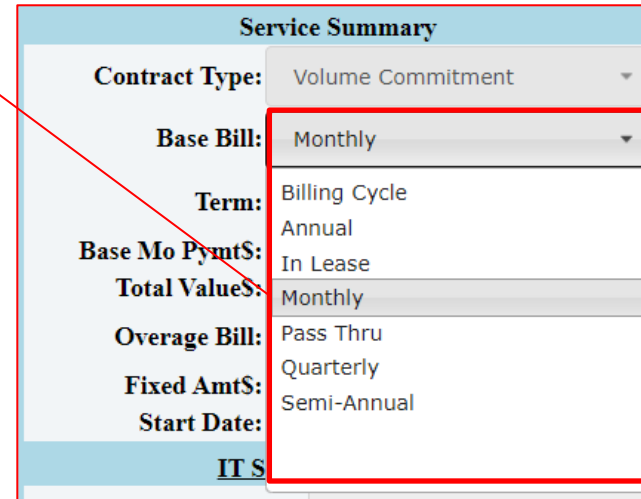
If you are pricing cost per copy (CPC) service, all service payments are considered overages.

1



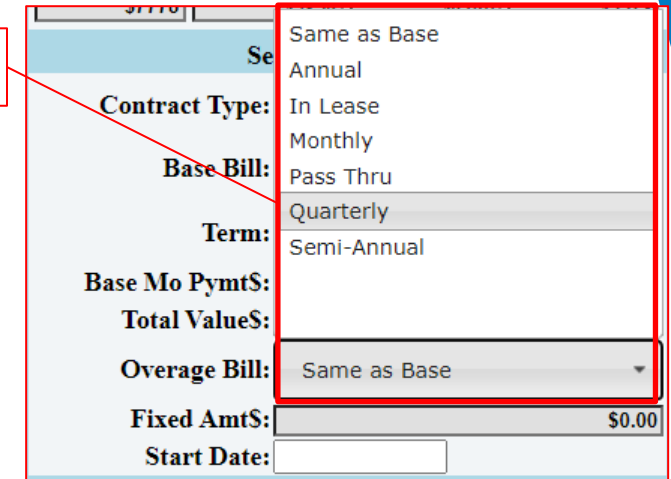
The screenshot shows a horizontal tab bar with the following tabs: General, Products, Service, IT Services, IT Product, and Pricing. The Pricing tab is highlighted with a red box.

2a

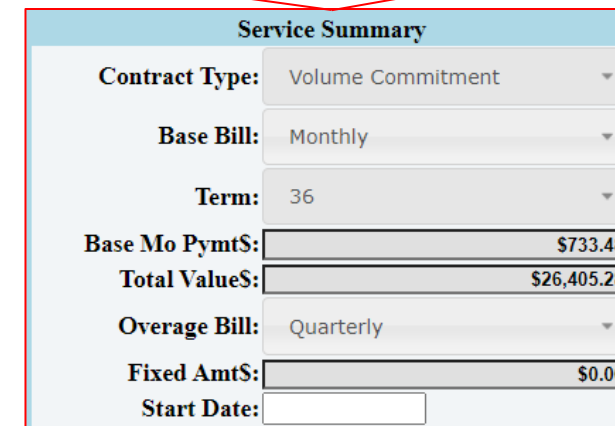


The screenshot shows the 'Service Summary' form. The 'Base Bill' dropdown menu is open, showing options: Billing Cycle, Annual, In Lease, Monthly, Pass Thru, Quarterly, and Semi-Annual. The 'Monthly' option is selected. The 'Contract Type' is 'Volume Commitment'.

2b



The screenshot shows the 'Service Summary' form. The 'Overage Bill' dropdown menu is open, showing options: Same as Base, Annual, In Lease, Monthly, Pass Thru, Quarterly, and Semi-Annual. The 'Same as Base' option is selected. The 'Contract Type' is 'Volume Commitment'.



The screenshot shows the 'Service Summary' form with the following values:

Service Summary	
Contract Type:	Volume Commitment
Base Bill:	Monthly
Term:	36
Base Mo Pymt\$:	\$733.48
Total Value\$:	\$26,405.28
Overage Bill:	Quarterly
Fixed Amt\$:	\$0.00
Start Date:	

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

To change a deal's IT service billing interval:

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

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

1

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

2

IT Services Summary

Billing: Monthly

Monthly\$: Billing Cycle

Annual\$: Annual

Term: In Lease

IT Prod Monthly

Pymt Terms: Sel Pass Thru

Total: Quarterly

Semi-Annual

IT Services Summary

Billing: Monthly

Monthly\$: \$185.52

Annual\$: \$2,226.24

Term: 36

Cost/Profit Summary

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

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

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

How To: Use the Scenario Pricing Tool

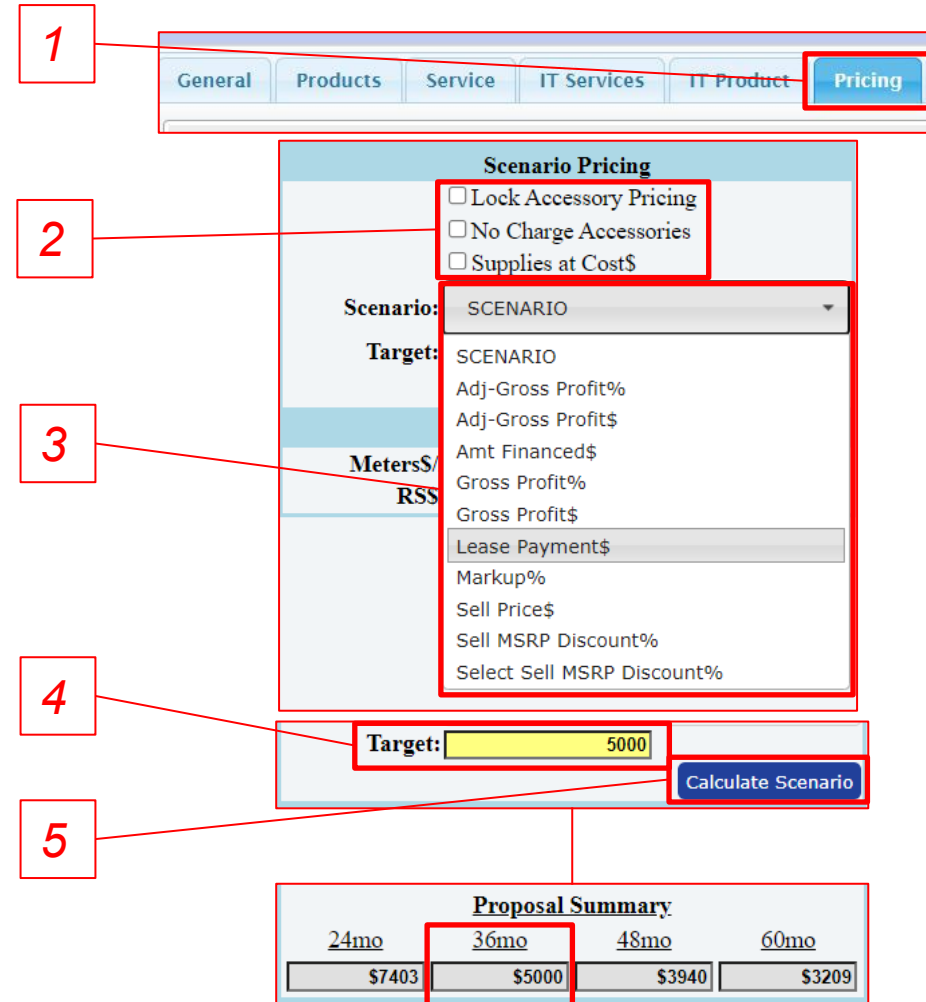
The *Scenario Pricing Tool* in the pricing tab allows you to target certain values to make a deal work for you or present your customer with nice round values. You may target lease payments, gross profit percentages and more.

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.



The screenshot shows the 'Pricing' tab selected in the top navigation bar. The 'Scenario Pricing' section contains three checkboxes: 'Lock Accessory Pricing', 'No Charge Accessories', and 'Supplies at Cost'. Below these is a 'Scenario' drop-down menu with a list of options including 'SCENARIO', 'Adj-Gross Profit%', 'Adj-Gross Profit\$', 'Amt Financed\$', 'Gross Profit%', 'Gross Profit\$', 'Lease Payment\$', 'Markup%', 'Sell Price\$', 'Sell MSRP Discount%', and 'Select Sell MSRP Discount%'. The 'Target' field is set to '5000'. The 'Calculate Scenario' button is visible. Below the main form is a 'Proposal Summary' table showing values for different lease terms.

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

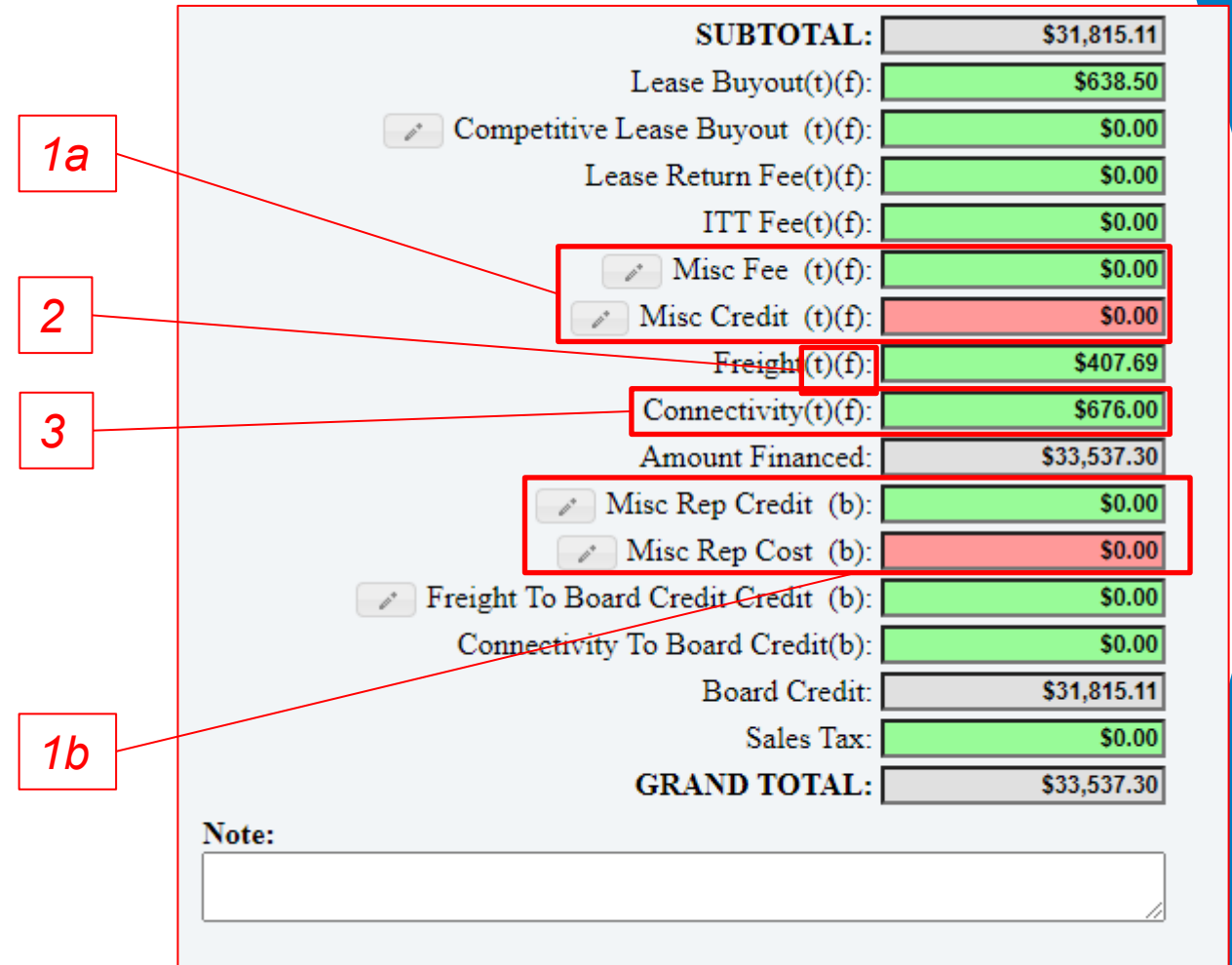
The section of the pricing tab on the far right with green and red fields includes all the fees and soft costs that may be associated with the order.

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

Key:

1. a) Anything in red above the Amount Financed indicates a cost to the customer. Anything in green above Amount Financed is a credit to the customer. b) Anything in green below Amount Financed is a credit to the margin of the deal. Anything 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: Soft Costs and Margin Adjustments



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

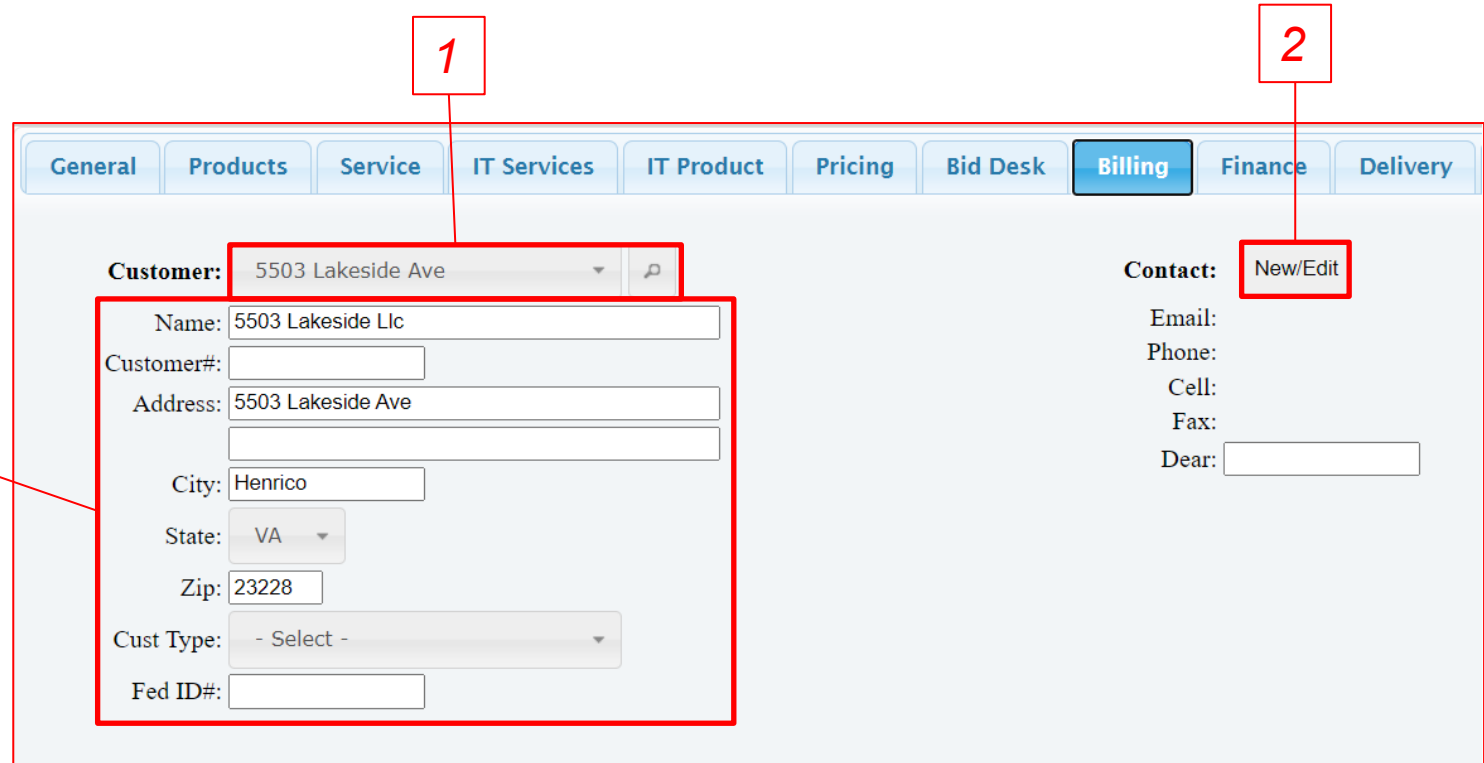
Note:

Proposal and Order Pricing: Billing Tab

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

Key:

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



Customer: 5503 Lakeside Ave

Contact: New/Edit

Customer Information:

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

Contact Information:

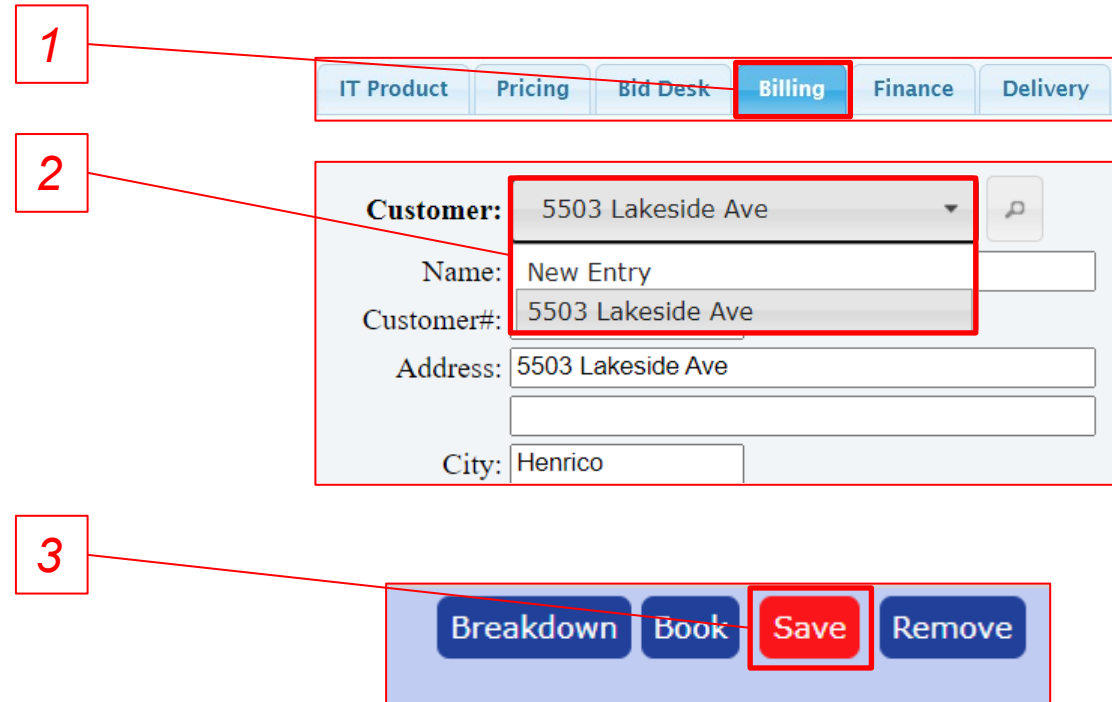
- Email:
- Phone:
- Cell:
- Fax:
- Dear:

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

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

To change a deal's billing address:

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



The screenshot shows the 'Billing' tab selected in a navigation bar. Below the navigation bar, a form is displayed. A red box labeled '1' points to the 'Billing' tab. A red box labeled '2' points to the 'Customer' drop-down menu, which is open and shows '5503 Lakeside Ave' selected. Below the drop-down, there are fields for 'Name' (New Entry), 'Customer#' (5503 Lakeside Ave), 'Address' (5503 Lakeside Ave), and 'City' (Henrico). A red box labeled '3' points to the 'Save' button in the bottom right corner of the form.

Quick Tip:

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

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

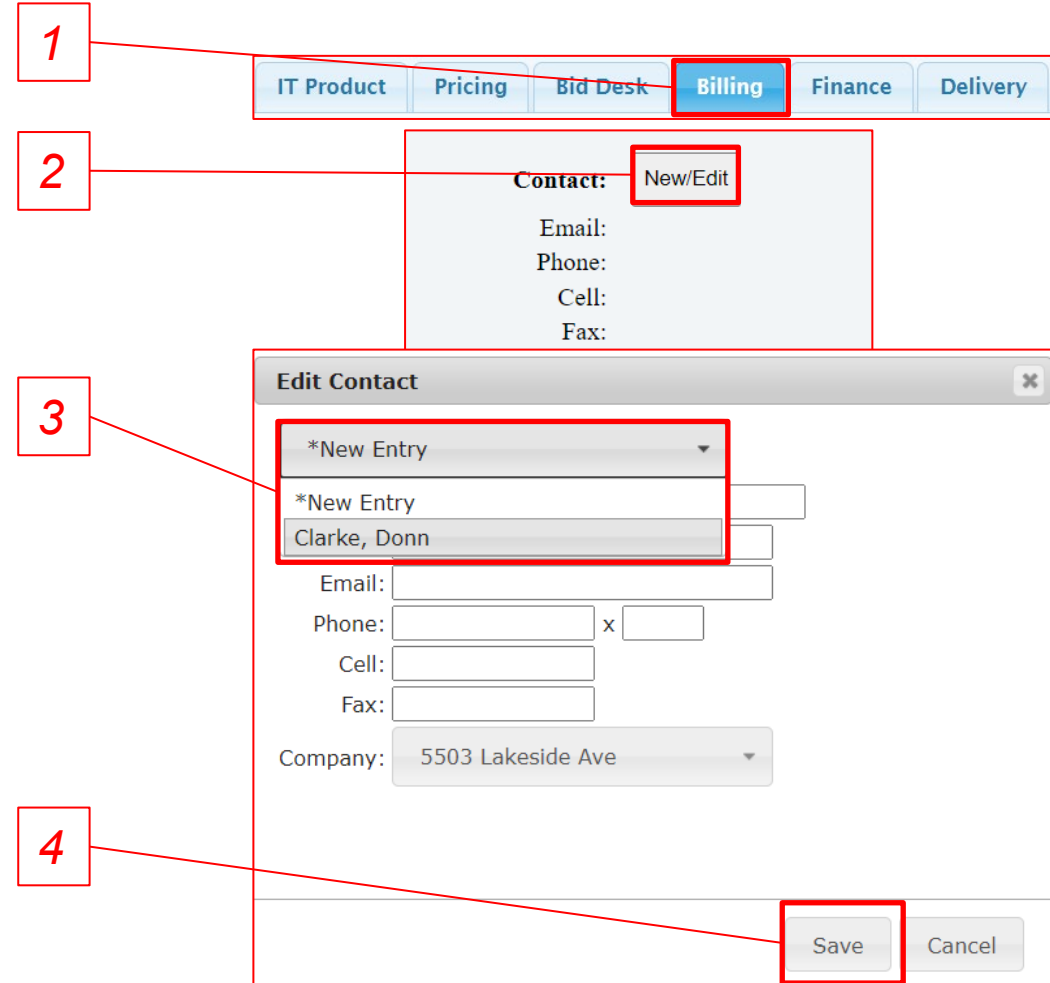
The Billing tab allows you to enter any given deal's billing contact.

To change the billing contact for any given deal:

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

Quick Tip:

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



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

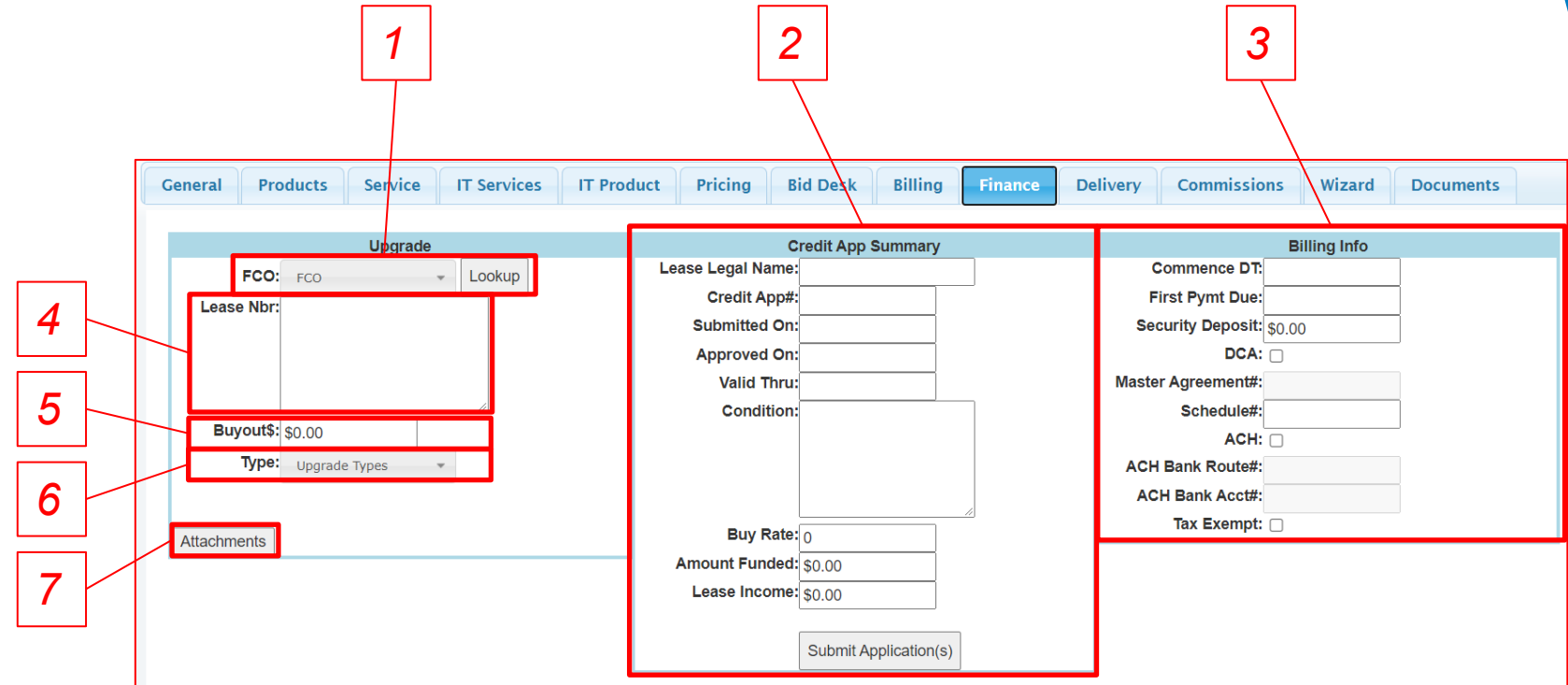
- 1**: Points to the **Billing** tab in the top navigation bar, which is currently selected.
- 2**: Points to the **New/Edit** button located next to the **Contact:** label in the Billing section.
- 3**: Points to the contact selection dropdown menu in the **Edit Contact** dialog box. The dropdown shows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

The **Edit Contact** dialog box also includes input fields for **Email:**, **Phone:** (with an extension 'x' field), **Cell:**, **Fax:**, and a **Company:** dropdown menu currently showing *5503 Lakeside Ave*.

Proposal and Order Pricing: Finance Tab

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

Key:	
1)	Lease Upgrade Lookup
2)	Credit Application Summary & Submit Button
3)	Billing Information Entry
4)	Display of linked leases to be upgraded
5)	Lease Buyout Value (pulled from Pricing Tab - See page 120)
6)	Lease upgrade type selection
7)	Attach a document



The screenshot displays the Finance tab interface with the following sections and highlighted features:

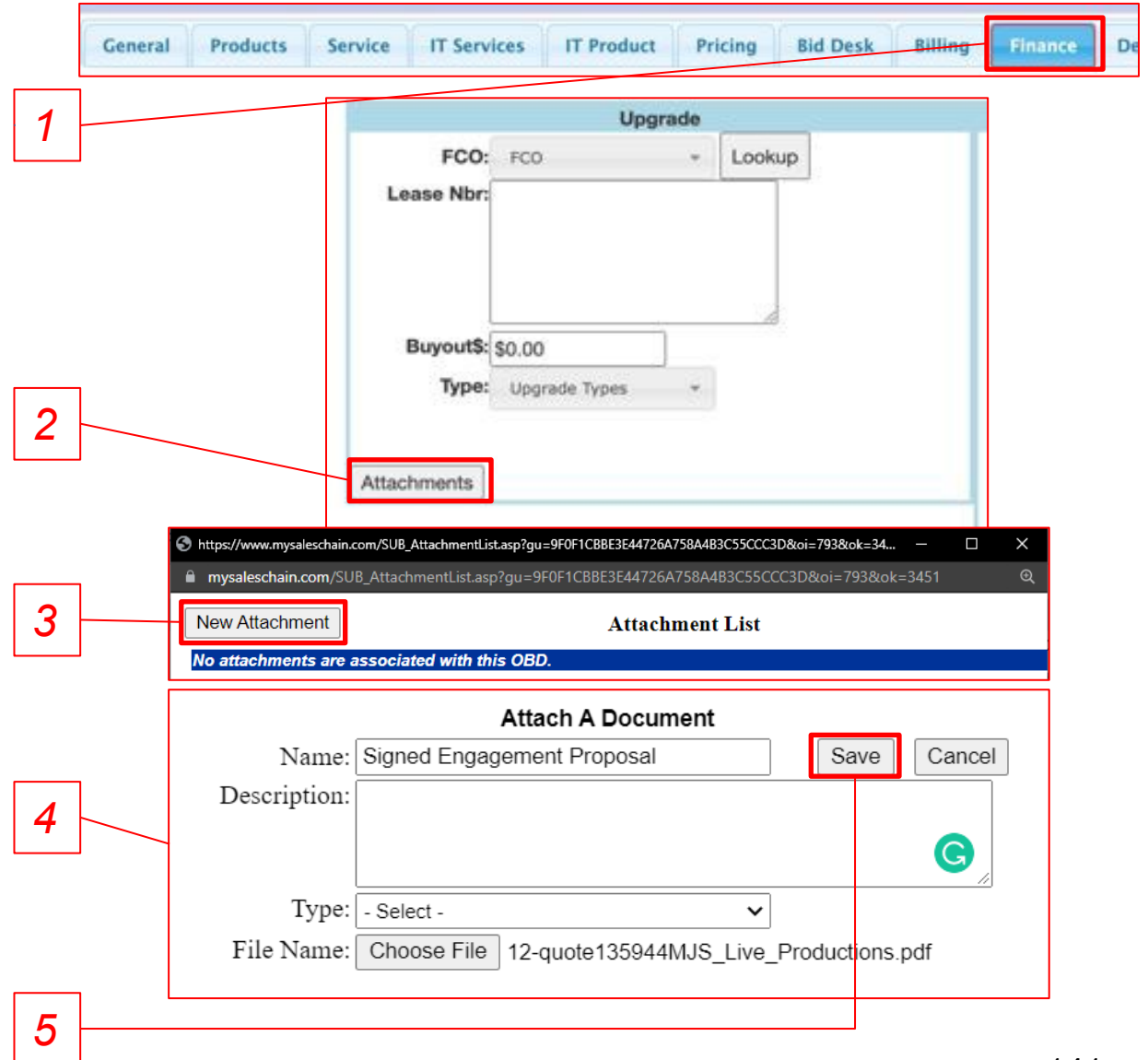
- Upgrade Section (Left):**
 - 1:** FCO: FCO (dropdown menu)
 - 4:** Lease Nbr: (text input field)
 - 5:** Buyout\$: \$0.00 (text input field)
 - 6:** Type: Upgrade Types (dropdown menu)
 - 7:** Attachments (button)
- Credit App Summary Section (Middle):**
 - 2:** Submit Application(s) (button)
- Billing Info Section (Right):**
 - 3:** Commence DT: (text input field)
 - First Pymt Due: (text input field)
 - Security Deposit: \$0.00 (text input field)
 - DCA: ☐
 - Master Agreement#: (text input field)
 - Schedule#: (text input field)
 - ACH: ☐
 - ACH Bank Route#: (text input field)
 - ACH Bank Acct#: (text input field)
 - Tax Exempt: ☐

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



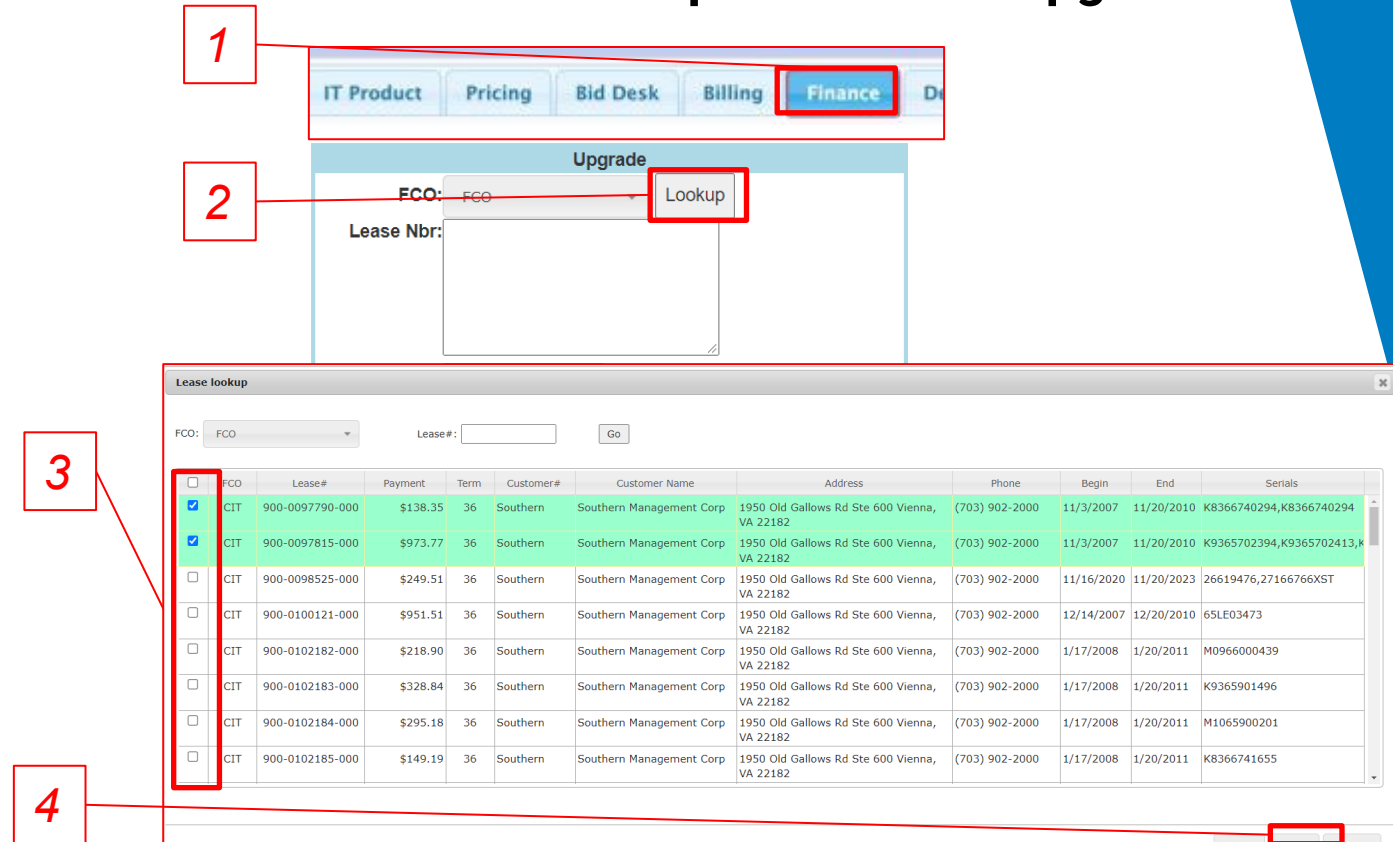
The screenshot illustrates the process of attaching a document to an order in the SalesChain system. The interface is divided into several tabs: General, Products, Service, IT Services, IT Product, Pricing, Bid Desk, Billing, and Finance. The Finance tab is highlighted with a red box and labeled with a red '1'. Below the tabs, the 'Upgrade' section is visible, containing fields for FCO, Lease Nbr, Buyout\$, and Type. The 'Attachments' link is highlighted with a red box and labeled with a red '2'. A red '3' points to the 'New Attachment' button in the 'Attachment List' section. The 'Attach A Document' form is shown with fields for Name, Description, Type, and File Name. The 'Save' button is highlighted with a red box and labeled with a red '5'. A red '4' points to the form fields. The 'File Name' field shows a file named '12-quote135944MJS_Live_Productions.pdf'.

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

To perform a lease lookup:

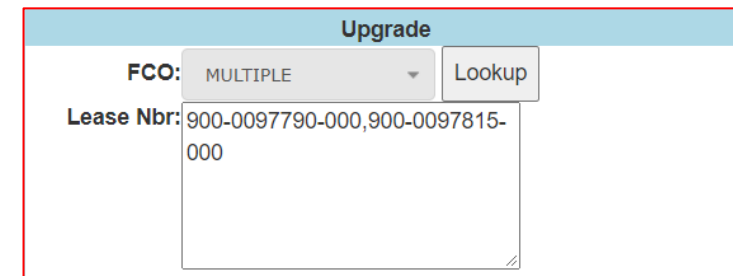
1. Navigate to the Finance tab
2. Click *Lookup*
3. Choose the appropriate existing lease(s) using the check box(es).
4. Click *Save*

How To: Lookup a Lease for Upgrade



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

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



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

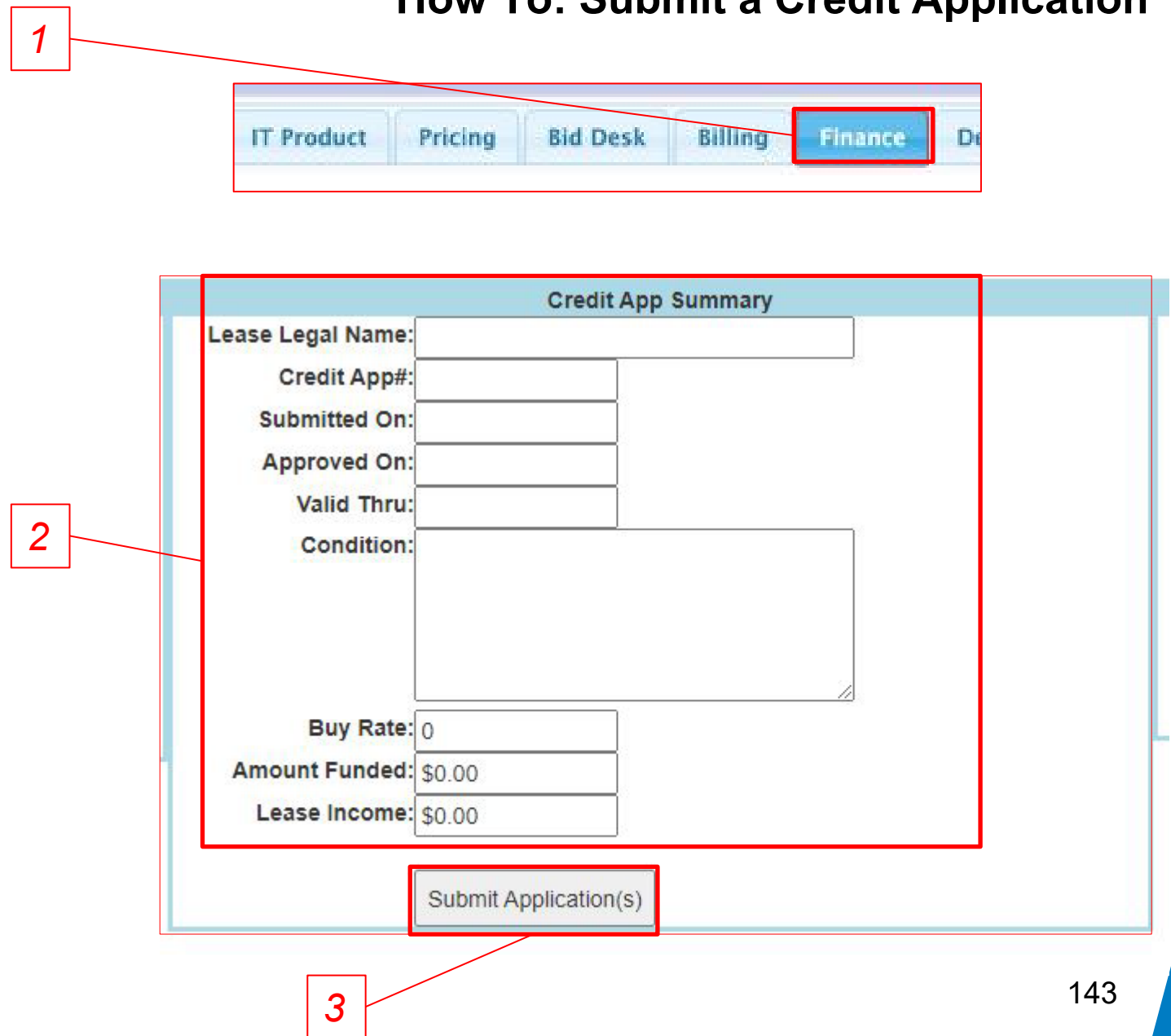
How To: Submit a Credit Application

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



The screenshot shows the SalesChain interface with the Finance tab selected. A red box labeled '1' points to the Finance tab. Below it, the Credit App Summary form is shown, with a red box labeled '2' pointing to the form fields. At the bottom of the form, a button labeled 'Submit Application(s)' is highlighted with a red box labeled '3'.

1

IT Product Pricing Bid Desk Billing Finance De

Credit App Summary

Lease Legal Name:

Credit App#:

Submitted On:

Approved On:

Valid Thru:

Condition:

Buy Rate:

Amount Funded:

Lease Income:

Submit Application(s)

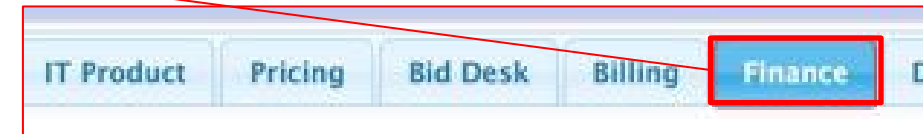
3

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

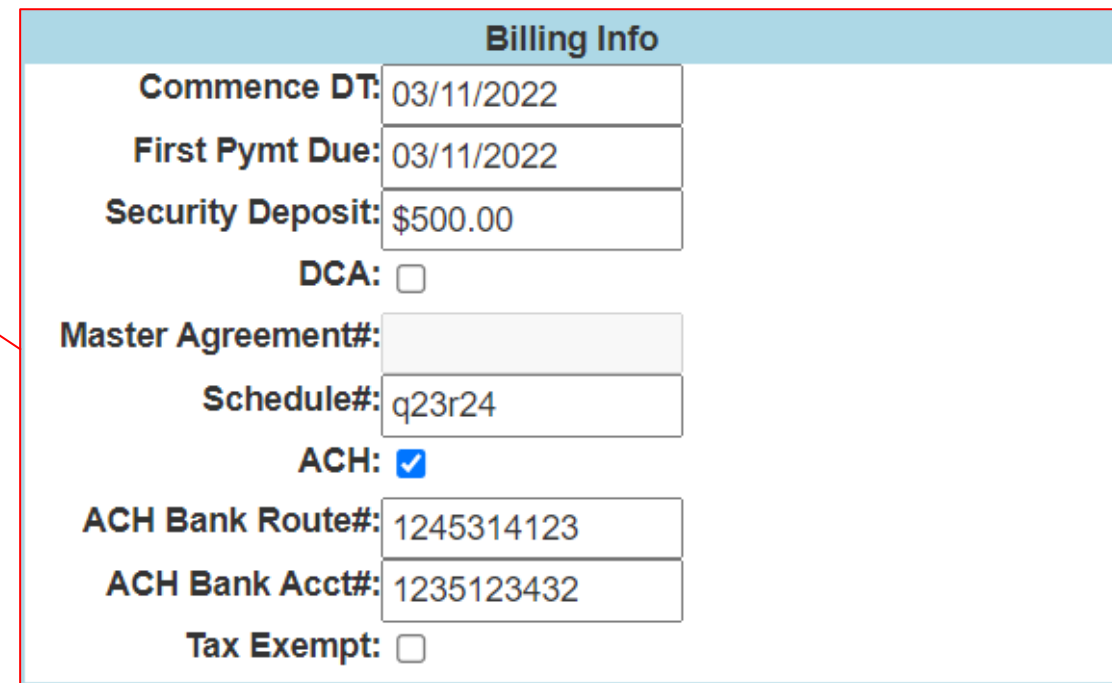
To complete the billing information on an order:

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

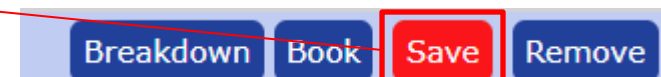
1



2



3



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](#))

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

Delivery Job: 2 - Second Location

Total #: 2

Status: Pending

Type: Copier

Coordinator: SELECT

Add Remove

Location

Info

Machines

Pickup & Move

Work Items

DJ Location Name: Second Location

SHIP-TO: 5503 Lakeside Ave

Company: 5503 Lakeside Llc

Cust #:

Address: 5503 Lakeside Ave

City: Henrico

State: VA

Zip: 23228

Primary Contact: Doe, John New/Edit

Email: JohnDoe@lakeside.com

Phone: (123)456-7890 Cell:

Fax:

IT Contact: Doe, John New/Edit

Email: JohnDoe@lakeside.com

Phone: (123)456-7890 Cell:

Fax:

Meter Contact: Doe, John New/Edit

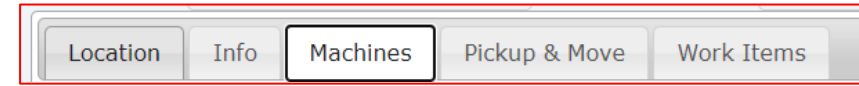
Email: JohnDoe@lakeside.com

Phone: (123)456-7890 Cell:

Fax:

Delivery Tab Vocabulary

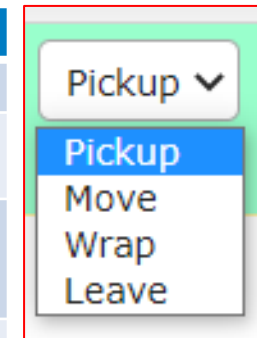
There are five subtabs within the delivery tab which allow you to view and edit delivery information. They are outlined in the table below.



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

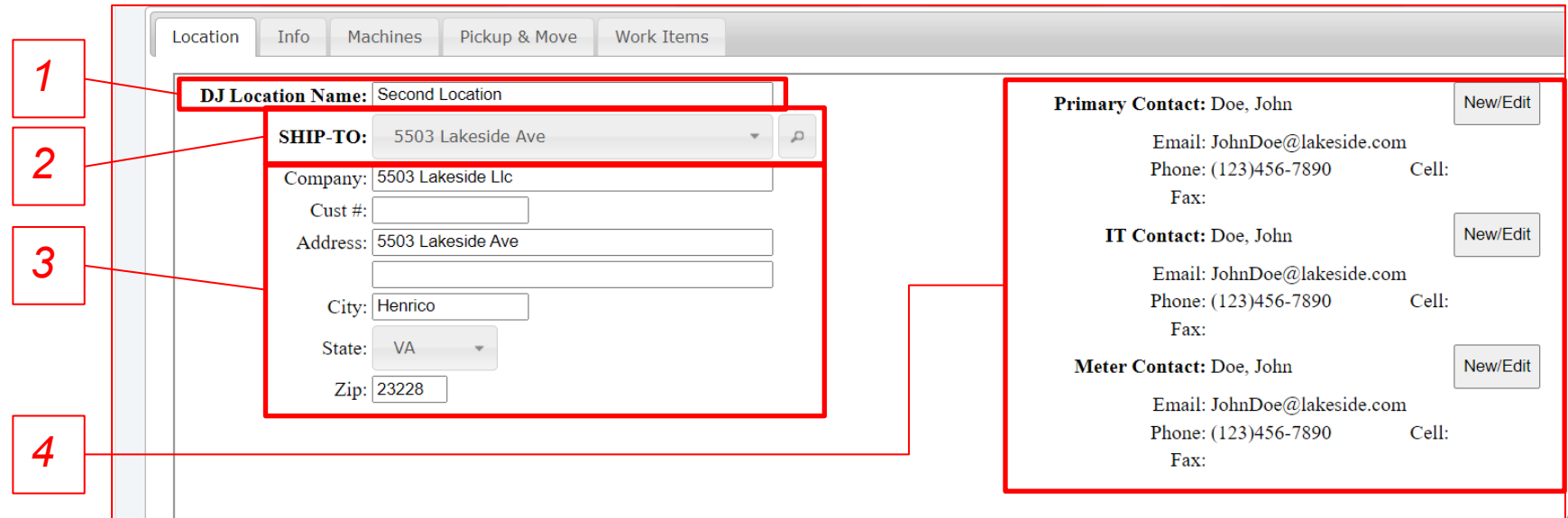


Proposal and Order Pricing: Delivery Tab - Location Subtab

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.



The screenshot shows the 'Location' subtab interface. The tabs at the top are 'Location', 'Info', 'Machines', 'Pickup & Move', and 'Work Items'. The 'Location' tab is active.

Callout 1 points to the 'DJ Location Name' field, which contains 'Second Location'.

Callout 2 points to the 'SHIP-TO' dropdown menu, which shows '5503 Lakeside Ave'.

Callout 3 points to the address details form, which includes fields for 'Company' (5503 Lakeside Llc), 'Cust #', 'Address' (5503 Lakeside Ave), 'City' (Henrico), 'State' (VA), and 'Zip' (23228).

Callout 4 points to the contact information section on the right, which includes fields for 'Primary Contact', 'IT Contact', and 'Meter Contact', each with 'Doe, John' as the name and 'Email: JohnDoe@lakeside.com', 'Phone: (123)456-7890', and 'Fax:' as the details. Each contact section has a 'New/Edit' button.

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](#)

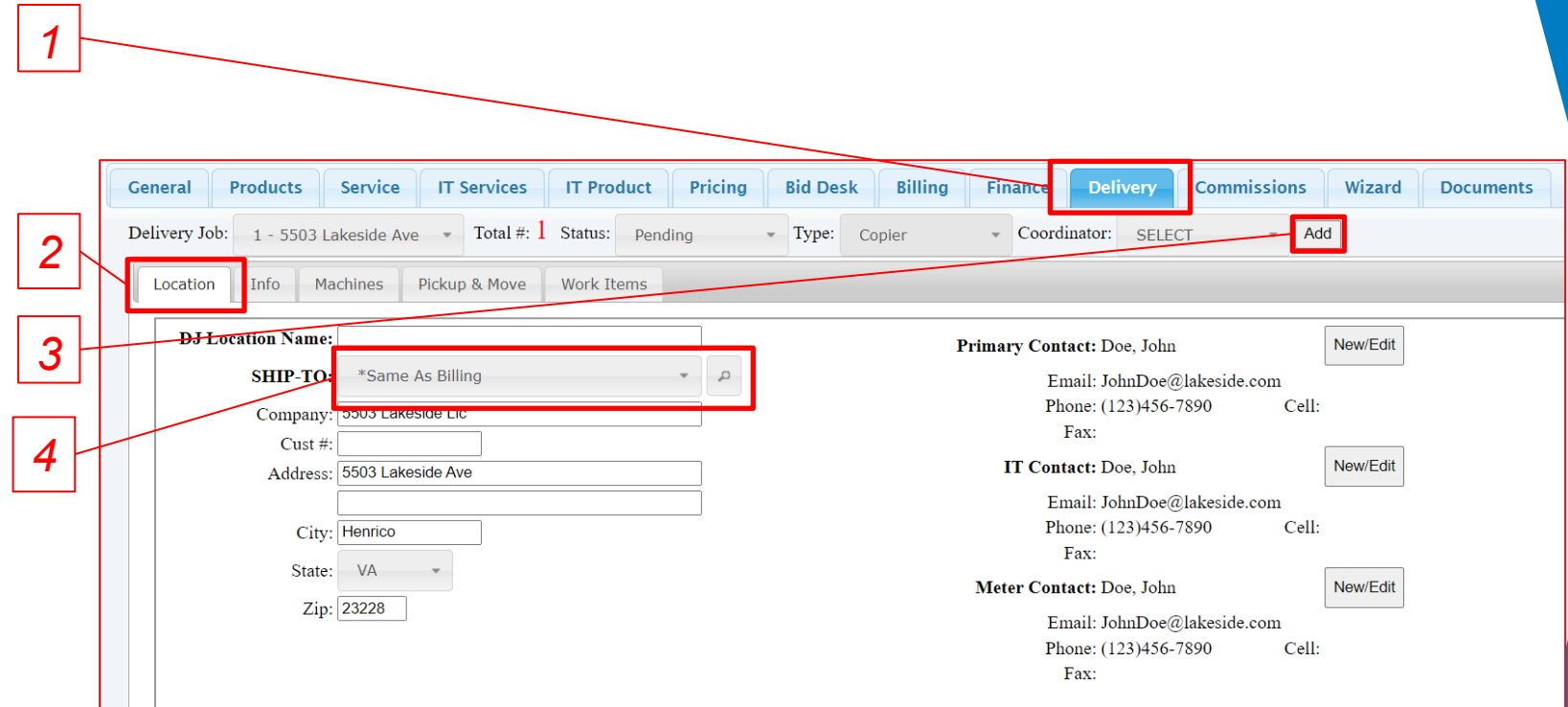
To add a new delivery location:

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.



The screenshot shows the 'Delivery' tab in the SalesChain system. Red boxes and numbers indicate the steps for adding a new delivery location:

- 1:** Points to the 'Delivery' tab in the top navigation bar.
- 2:** Points to the 'Location' subtab within the Delivery section.
- 3:** Points to the 'Add' button in the top right corner of the Delivery section.
- 4:** Points to the 'SHIP-TO' dropdown menu, which currently shows '*Same As Billing'.

The form displays details for a delivery job, including:

- Delivery Job:** 1 - 5503 Lakeside Ave
- Total #:** 1
- Status:** Pending
- Type:** Copier
- Coordinator:** SELECT
- Location subtab:** Location, Info, Machines, Pickup & Move, Work Items
- SHIP-TO:** *Same As Billing
- Company:** 5503 Lakeside Lic
- Cust #:** [Empty field]
- Address:** 5503 Lakeside Ave
- City:** Henrico
- State:** VA
- Zip:** 23228
- Primary Contact:** Doe, John (New/Edit button)
- IT Contact:** Doe, John (New/Edit button)
- Meter Contact:** Doe, John (New/Edit button)

How To: Remove Delivery Jobs From an Order

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

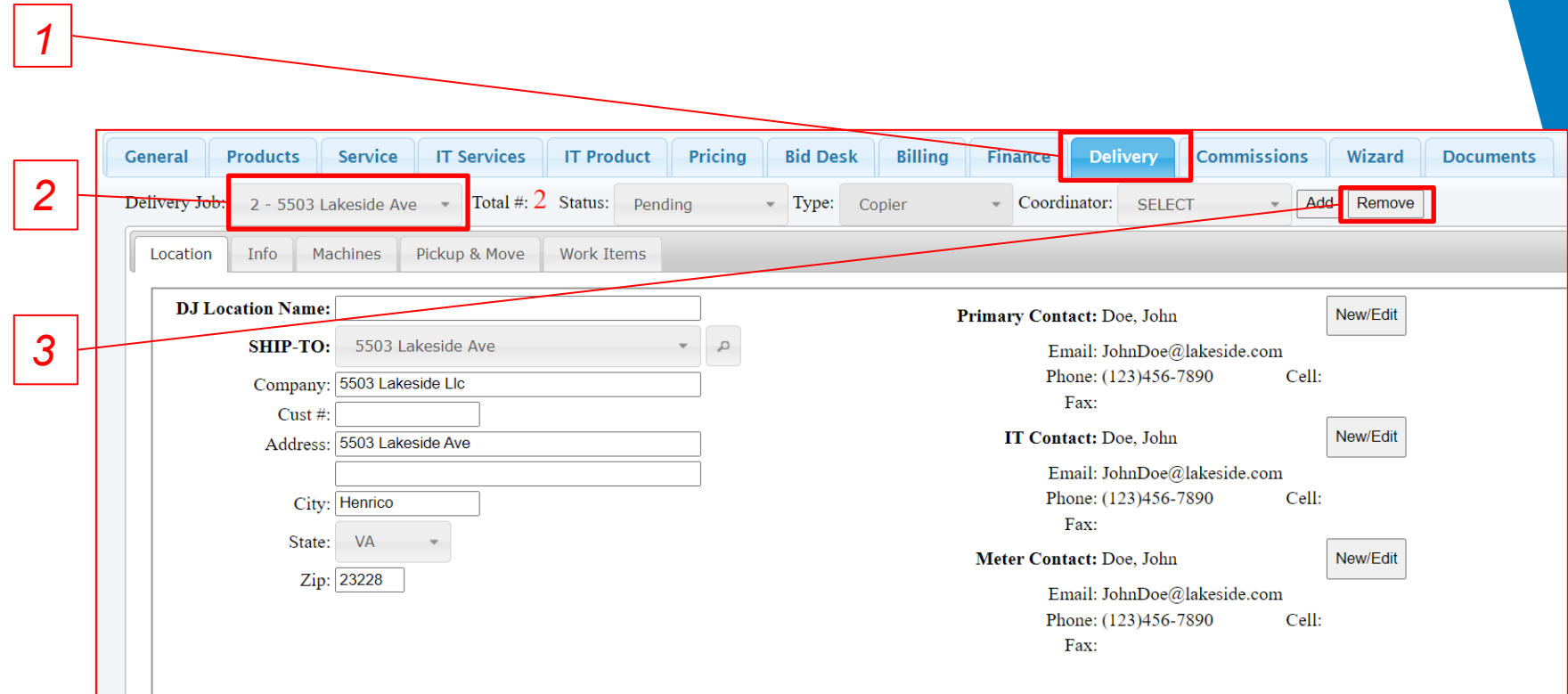
Note: Machines allocated to this delivery job will no longer be assigned to ANY delivery job. If you delete a job with machines allocated to it, be sure to re-allocate those machines to a different delivery job.

[View a Tutorial Video](#)

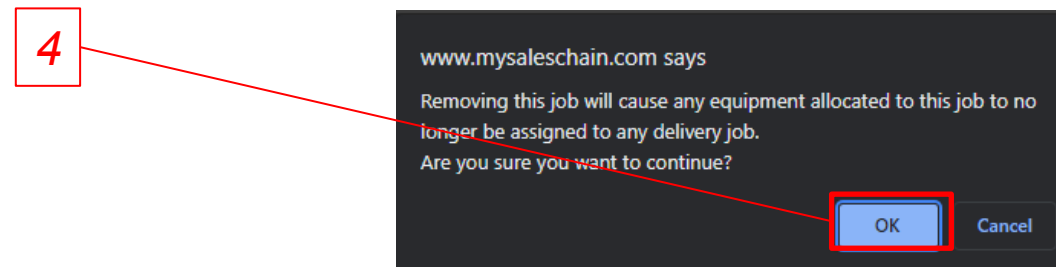
To remove a delivery job:

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

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



The screenshot shows the SalesChain interface with the **Delivery** tab selected. The **Delivery Job** dropdown is set to "2 - 5503 Lakeside Ave". The **Remove** button is visible. The **DJ Location Name** field is empty. The **SHIP-TO** field is set to "5503 Lakeside Ave". The **Company** field is "5503 Lakeside Llc". The **Cust #** field is empty. The **Address** field is "5503 Lakeside Ave". The **City** field is "Henrico". The **State** field is "VA". The **Zip** field is "23228". The **Primary Contact** is "Doe, John" with email "JohnDoe@lakeside.com" and phone "(123)456-7890". The **IT Contact** is "Doe, John" with email "JohnDoe@lakeside.com" and phone "(123)456-7890". The **Meter Contact** is "Doe, John" with email "JohnDoe@lakeside.com" and phone "(123)456-7890".



www.mysaleschain.com says
 Removing this job will cause any equipment allocated to this job to no longer be assigned to any delivery job.
 Are you sure you want to continue?
 OK Cancel

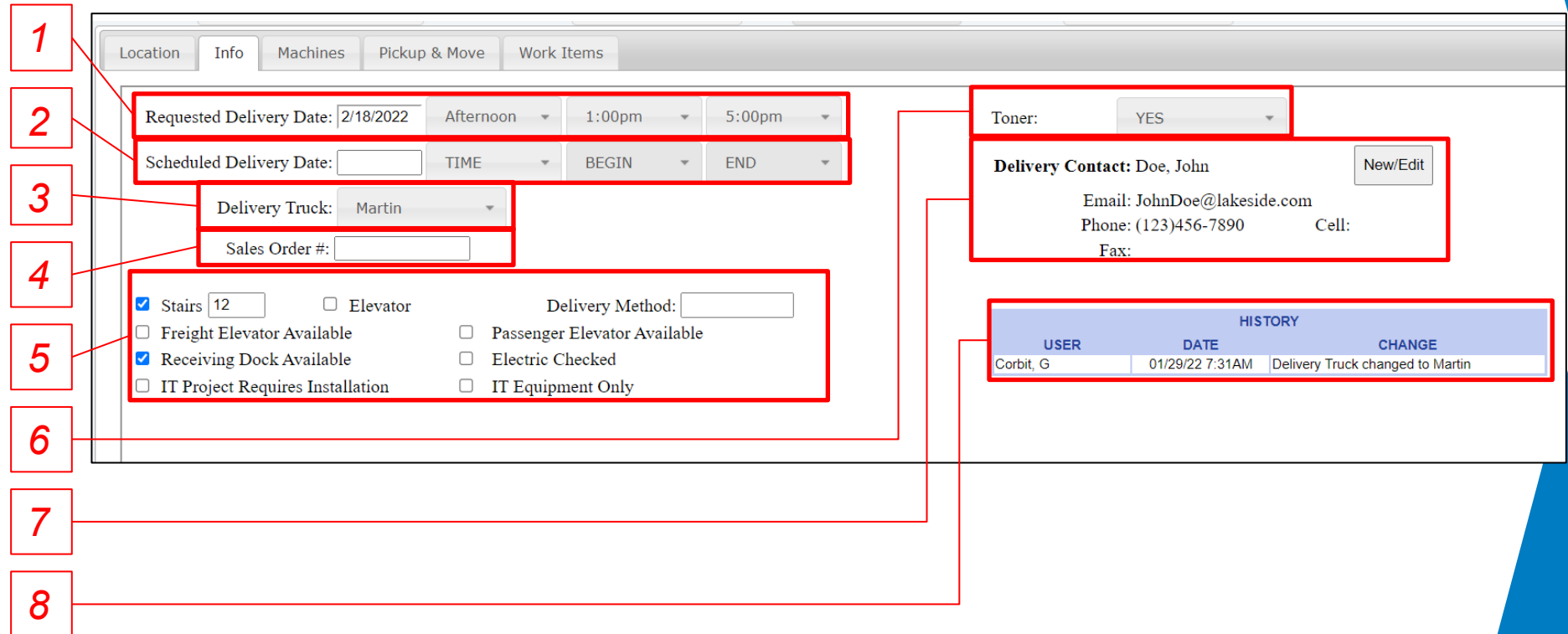
Proposal & Order Pricing: Delivery Tab - Info Subtab

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 fulfilment process)



The screenshot shows the 'Info' subtab of the 'Delivery' section. The interface includes several input fields and sections:

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

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

How To: Request and Schedule a Delivery Date

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

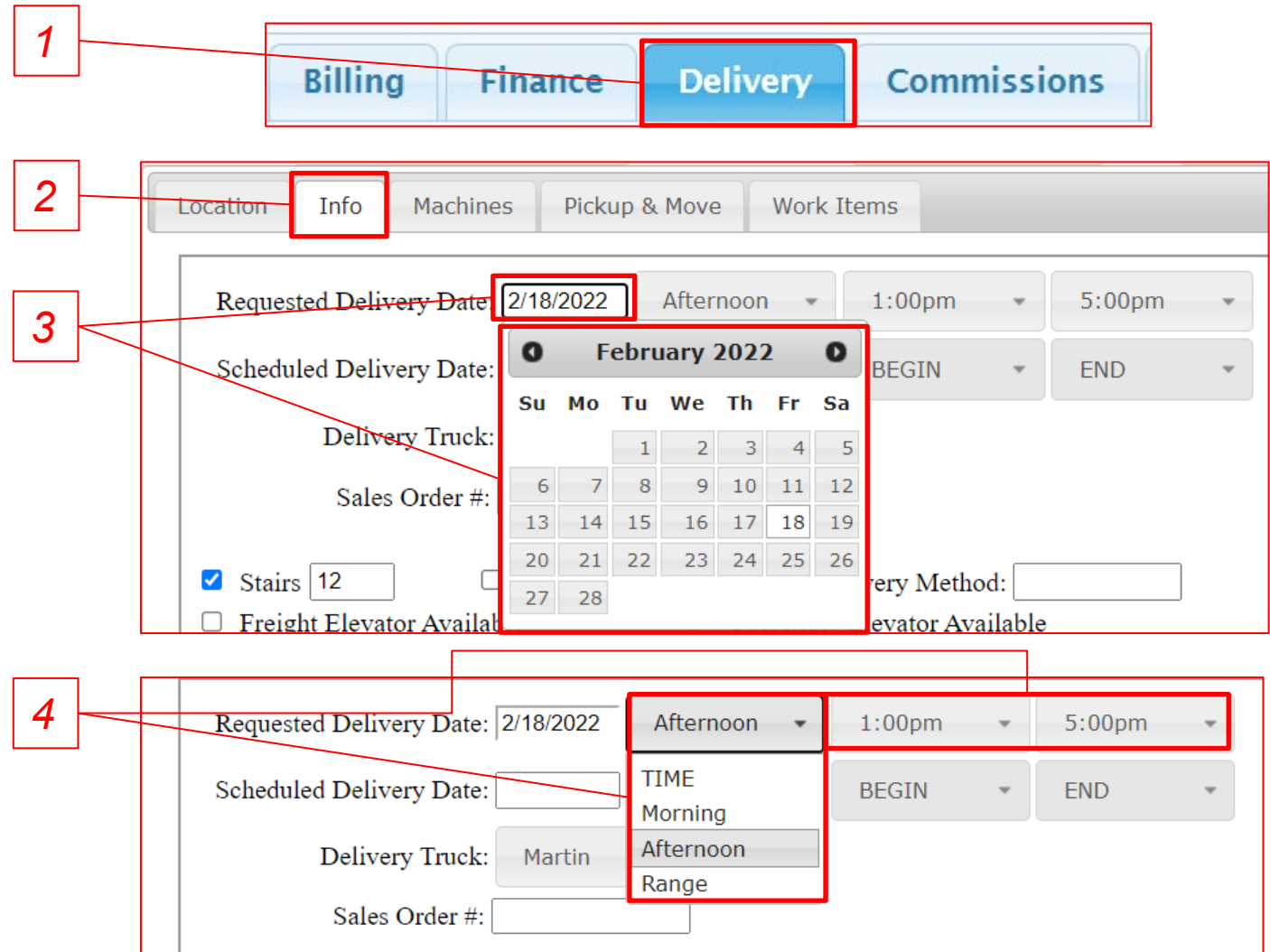
Note: This sends a message to the fulfillment or management staff to request this date and time while not actually locking the delivery staff into a committed date and time window.

[View a Tutorial Video](#)

To request a delivery date:

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

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



1. Billing Finance **Delivery** Commissions

2. Location **Info** Machines Pickup & Move Work Items

3. Requested Delivery Date: 2/18/2022 Afternoon 1:00pm 5:00pm

Scheduled Delivery Date: BEGIN END

Delivery Truck: Martin

Sales Order #:

☒ Stairs 12 ☐ Freight Elevator Available

Delivery Method:

4. Requested Delivery Date: 2/18/2022 Afternoon 1:00pm 5:00pm

Scheduled Delivery Date:

Delivery Truck: Martin

Sales Order #:

TIME
Morning
Afternoon
Range

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.

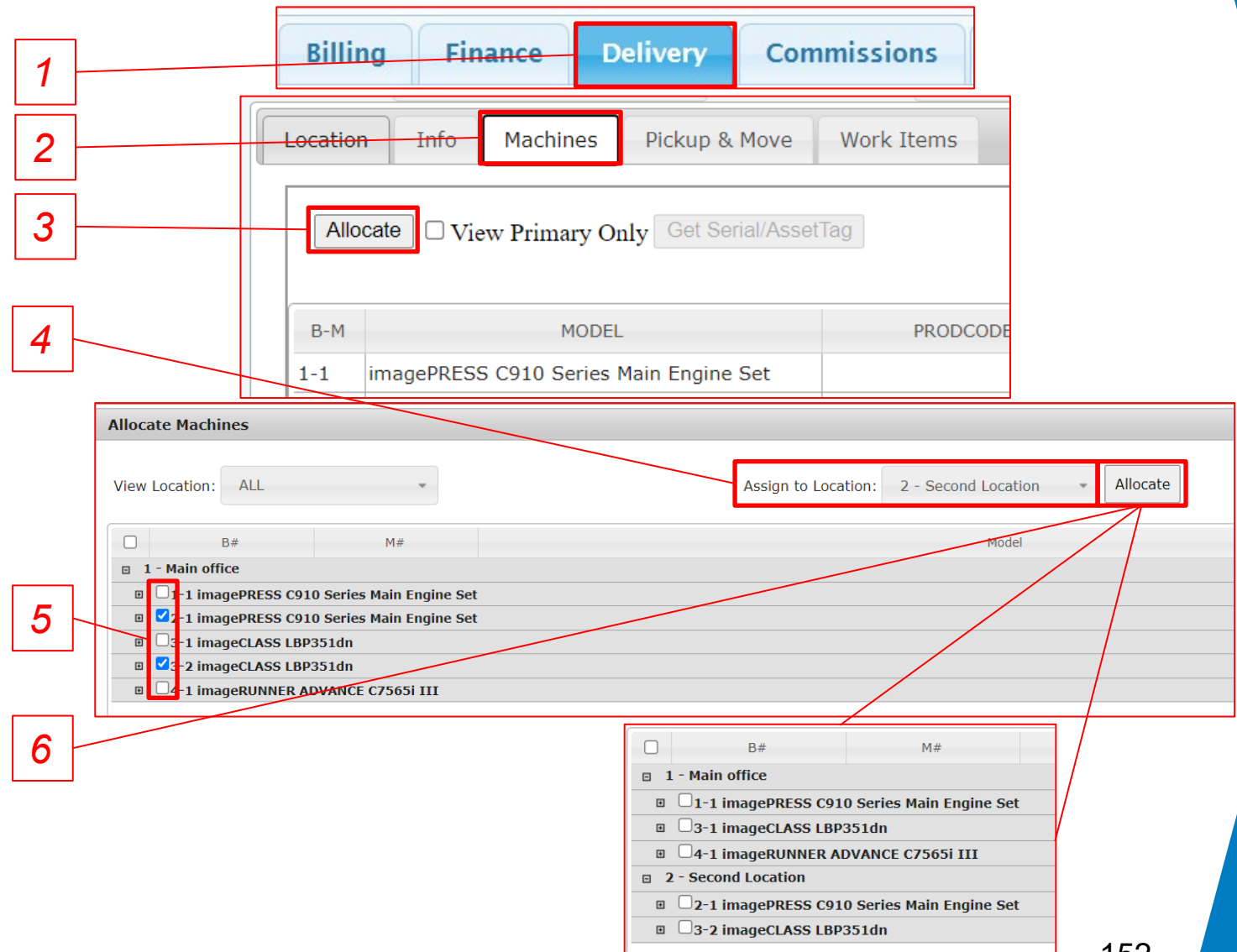
[View a Tutorial Video](#)

To allocate assets to delivery jobs:

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

Quick Tip:

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



The screenshot illustrates the steps to allocate assets to delivery jobs in the SalesChain system. The interface is divided into several sections:

- Top Navigation:** Includes tabs for Billing, Finance, **Delivery** (highlighted with callout 1), and Commissions.
- Subnavigation:** Under the Delivery tab, there are subtabs for Location, Info, **Machines** (highlighted with callout 2), Pickup & Move, and Work Items.
- Action Buttons:** Below the subnavigation, there is an **Allocate** button (callout 3) and a checkbox for "View Primary Only". A "Get Serial/AssetTag" button is also present.
- Table:** A table with columns B-M, MODEL, and PRODCODE. The first row shows "1-1" under B-M and "imagePRESS C910 Series Main Engine Set" under MODEL (callout 4).
- Allocate Machines Dialogue:** This is a modal window that appears when the Allocate button is clicked. It contains:
 - A "View Location:" dropdown set to "ALL".
 - An "Assign to Location:" dropdown set to "2 - Second Location" (callout 5).
 - An **Allocate** button (callout 6).
 - A list of assets with checkboxes for selection. The assets are grouped by location:
 - 1 - Main office:**
 - ☐ 1-1 imagePRESS C910 Series Main Engine Set
 - ☒ 2-1 imagePRESS C910 Series Main Engine Set
 - ☐ 3-1 imageCLASS LBP351dn
 - ☒ 3-2 imageCLASS LBP351dn
 - ☐ 4-1 imageRUNNER ADVANCE C756Si III
 - 2 - Second Location:**
 - ☐ 1-1 imagePRESS C910 Series Main Engine Set
 - ☐ 3-1 imageCLASS LBP351dn
 - ☐ 4-1 imageRUNNER ADVANCE C756Si III

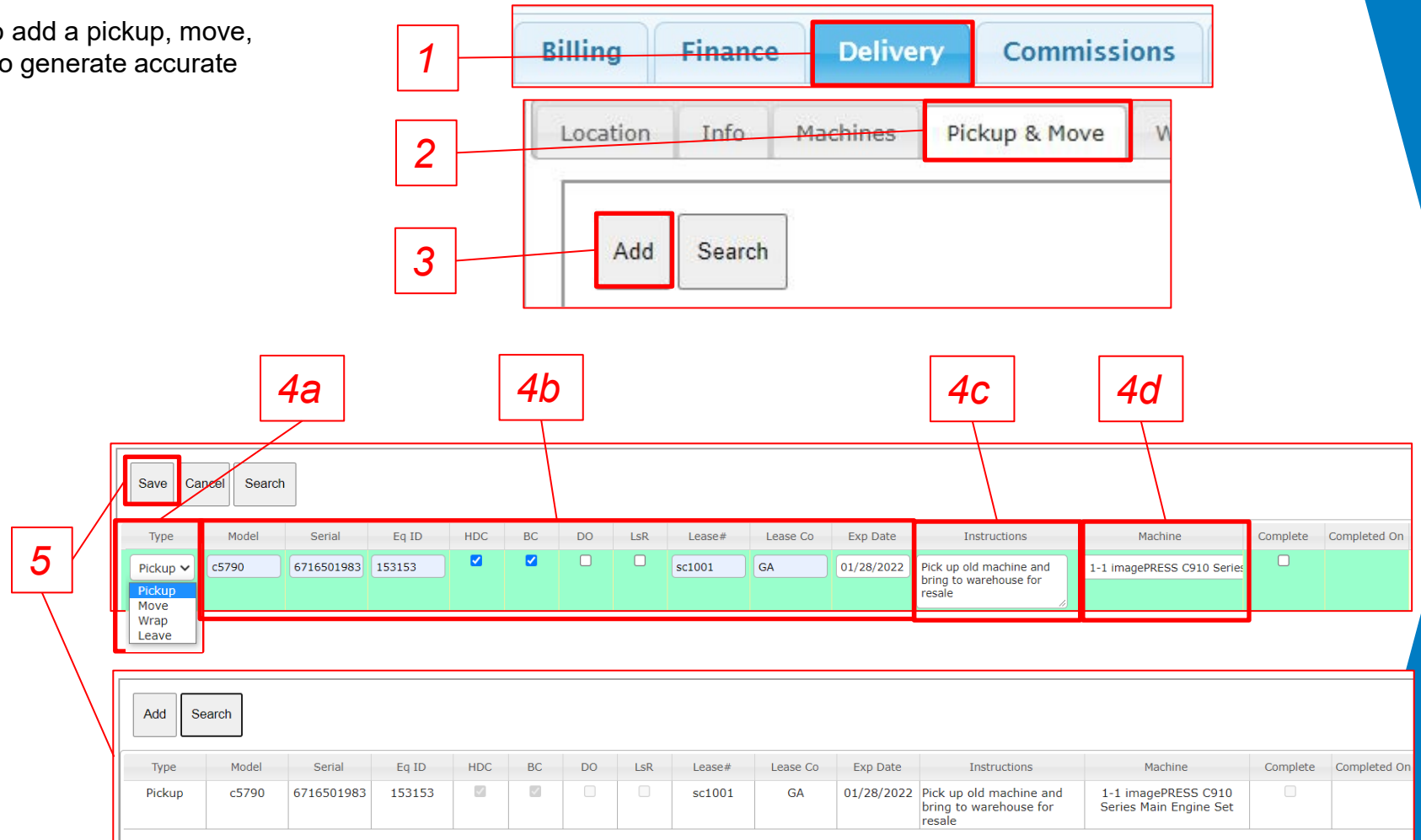
How To: Add Pickup and Move Instructions to a Delivery Job

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

[View a Tutorial Video](#)

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

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



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

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

The form contains a table with the following data:

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

Quick Tips:

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

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

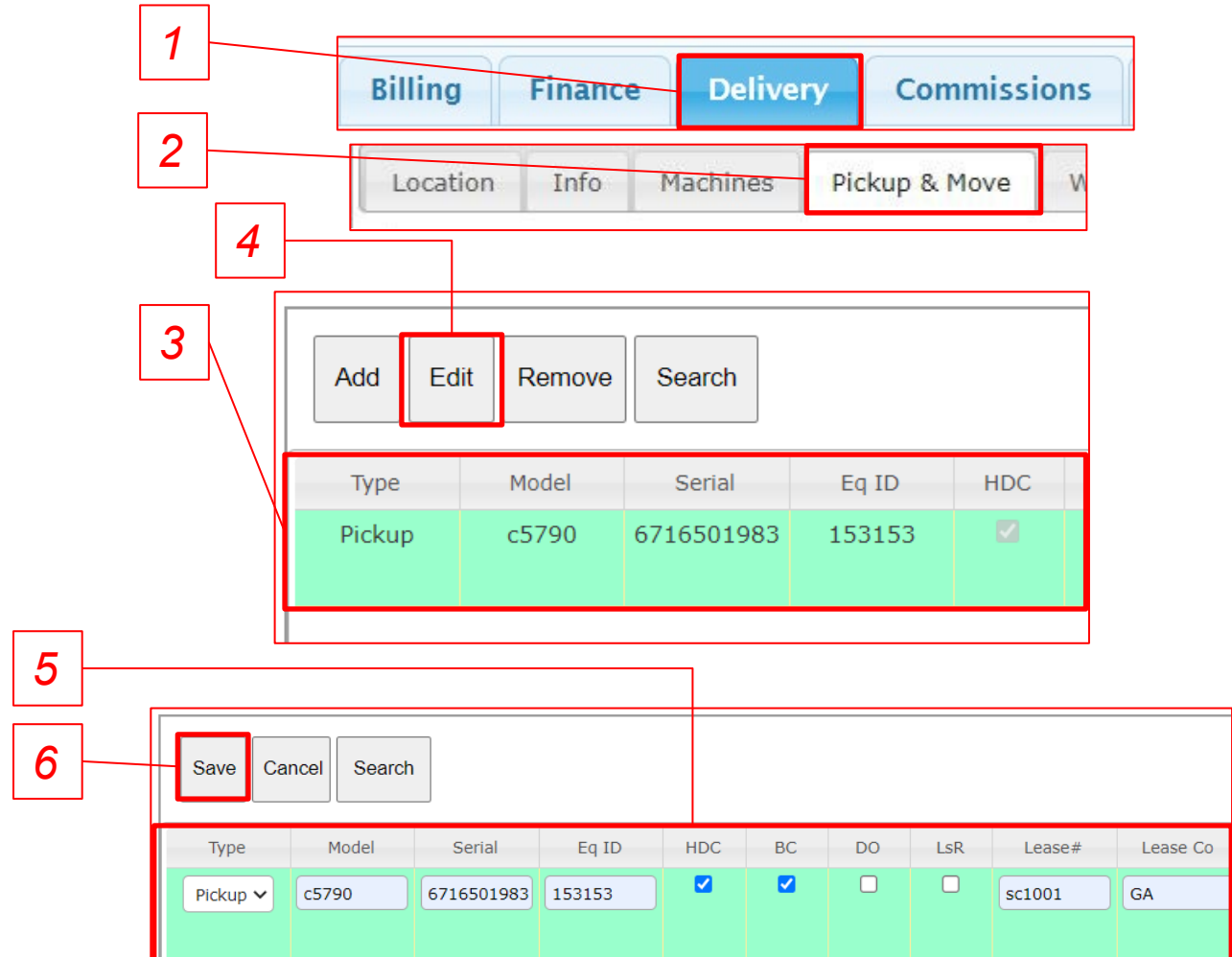
It is possible to edit delivery jobs you have created to make corrections or adjustments.

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

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

Quick Tip:

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



The screenshot illustrates the steps to edit a delivery job in the SalesChain system. The interface shows a navigation bar with tabs: Billing, Finance, **Delivery** (Step 1), and Commissions. Below this is a subtab bar with options: Location, Info, Machines, **Pickup & Move** (Step 2), and W. The main content area displays a table of delivery jobs. The first row is highlighted in green (Step 3). Above the table are buttons: Add, **Edit** (Step 4), Remove, and Search. The table has columns: Type, Model, Serial, Eq ID, and HDC. The first row contains: Pickup, c5790, 6716501983, 153153, and a checked checkbox. Below this is a second table with more columns: Type, Model, Serial, Eq ID, HDC, BC, DO, LsR, Lease#, and Lease Co. The first row of this table contains: Pickup (dropdown), c5790, 6716501983, 153153, a checked checkbox, a checked checkbox, an unchecked checkbox, an unchecked checkbox, sc1001, and GA. Above this second table are buttons: **Save** (Step 5), Cancel, and Search (Step 6).

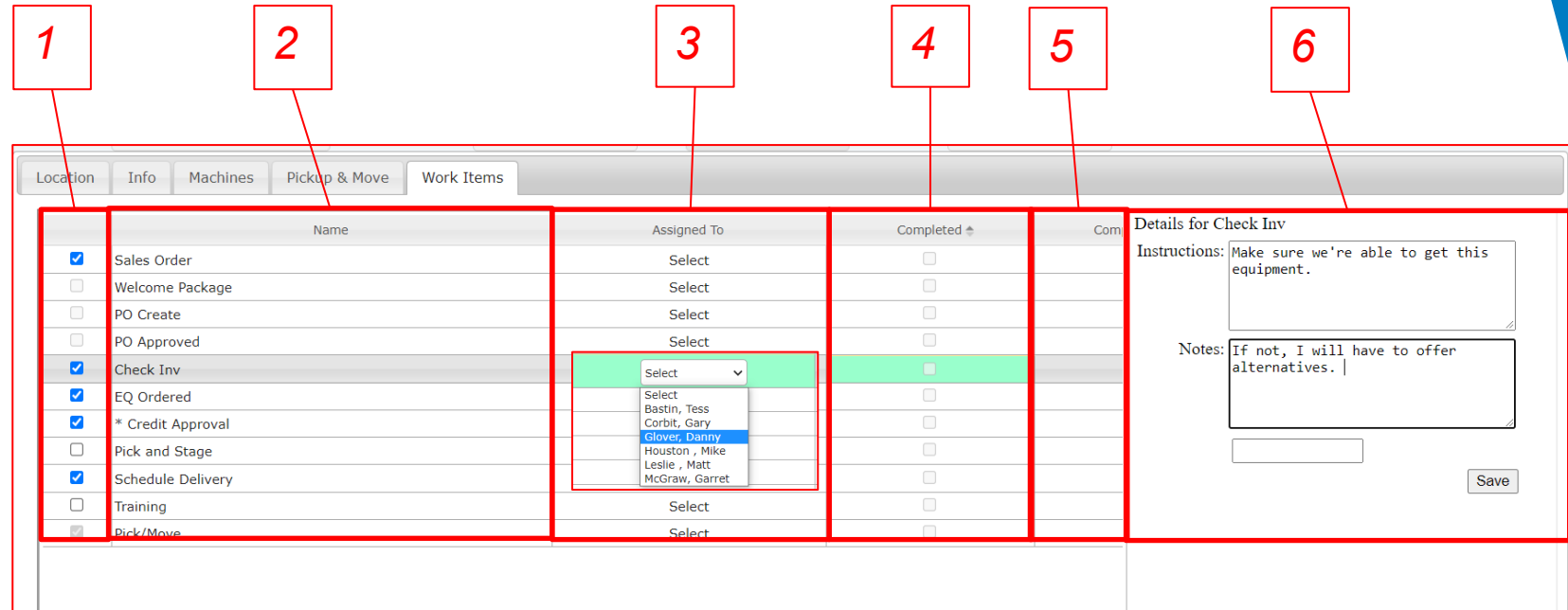
Proposal & Order Pricing: Delivery Tab – Work Items Subtab

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

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

Key:

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



The screenshot shows the 'Work Items' subtab interface. It features a table with columns: Name, Assigned To, Completed, and a Details panel on the right. The 'Check Inv' row is highlighted in green. A dropdown menu is open for the 'Assigned To' column of the 'Check Inv' row, showing a list of users including Bastin, Tess; Corbit, Gary; Glover, Danny; Houston, Mike; Leslie, Matt; and McGraw, Garret. The 'Completed' column has checkboxes for each row. The 'Details for Check Inv' panel on the right contains instructions, notes, and a 'Save' button.

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

Proposal and Order Pricing: Commissions Tab

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

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

Key:

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

Commission Level: D Deal
1

Commissions Summary (NNC)

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

Tracking

Paid (Pri): ☐

Paid (Split): ☐

Sales Order:

Invoice#:

Invoice DT:

Note:

Cost/Profit Summary

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

2

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

Split Rep 2: SELECT 0.00% \$0.00

Referral Fee: SELECT \$0.00

Production Print: SELECT \$0.00

IT Rep: SELECT \$0.00

Service Tech Referral: SELECT \$0.00

Percent of Rep Cost: SELECT \$0.00

Percent of Rep Cost: \$0.00

Spiff 2: SELECT \$0.00

\$Total Comm: \$29,840.75

3

RECURRING COMMISSION

Status: Active

Sales Rep: Corbit, Gary

SRC Revenue: \$5,000.00

*** PCT:** 10.00%

SRev Amt: \$500.00

SRC GP: \$0.00

*** PCT:** 0.00%

SGP Amt: \$0.00

SManual: \$0.00

\$Total RC Amt: \$500.00

Begin Year: 2022

Month: January

#Payments: 60

Frequency: Monthly

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

Quick Tips:

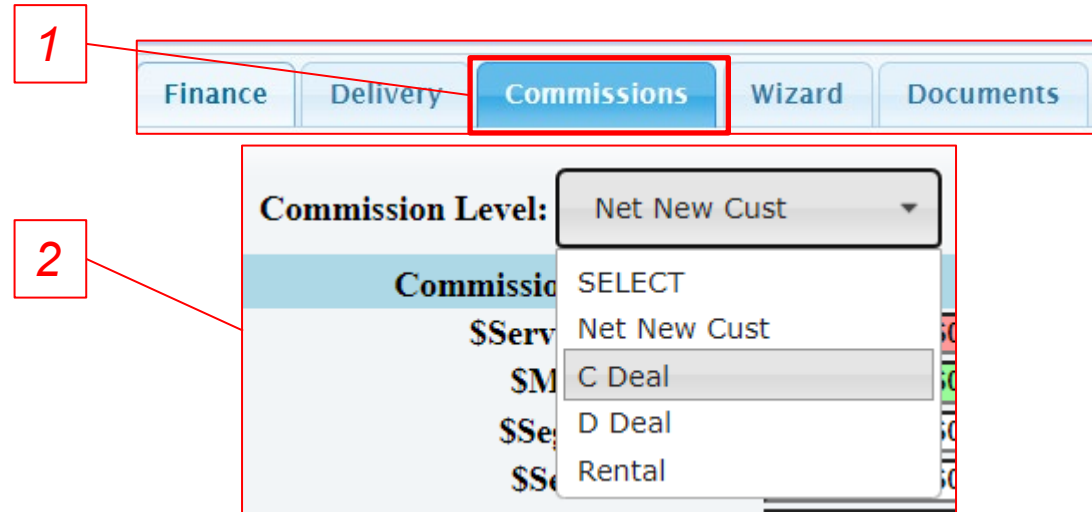
- Commission level and price level may exclude manufacturer credits and segment bonuses from a transaction. Consult your system administrator or sales manager if you have questions.
- Below the information displayed in this screenshot you will see a *Cost Profit Summary*, the same as in the *Pricing*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



The screenshot shows the SalesChain interface with the **Commissions** tab selected. A red box labeled '1' highlights the tab bar. A second red box labeled '2' highlights the **Commission Level:** dropdown menu, which is currently set to **Net New Cust**. The dropdown list shows the following options: **SELECT**, **Net New Cust**, **C Deal**, **D Deal**, and **Rental**.

Quick Tip:

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

Primary Rep: 0.2

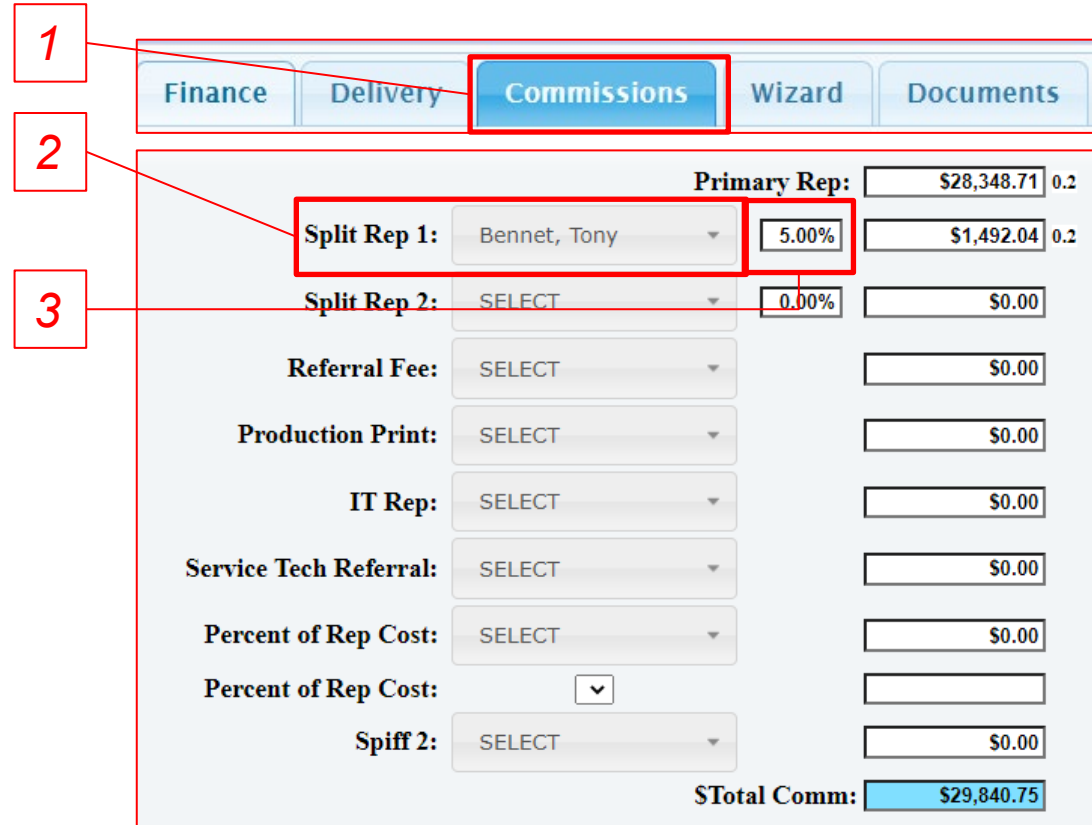
How to: Set Up Split Rep Commissions

It is possible to process split rep commissions on cross sold, complex, or referral deals within the commission tab.

Important: Split rep commission options are highly customizable, and your system configuration may display different drop-down menus here.

To set up split rep commissions:

1. Navigate to the *Commissions* tab
2. Select the name of the rep who will receive this portion of commission using the *Split Rep* or other drop downs.
3. Enter a value in the text box to the right of the drop down for the appropriate percentage of commission for this user to receive.



The screenshot shows the 'Commissions' tab in the SalesChain system. The interface includes a top navigation bar with tabs for Finance, Delivery, Commissions (highlighted), Wizard, and Documents. Below the navigation bar, the 'Primary Rep' section shows a value of \$28,348.71 with a 0.2 multiplier. The 'Split Rep 1' section shows a dropdown menu with 'Bennet, Tony' selected and a text box with '5.00%'. The 'Split Rep 2' section shows a dropdown menu with 'SELECT' and a text box with '0.00%'. Below these are several other sections: 'Referral Fee', 'Production Print', 'IT Rep', 'Service Tech Referral', 'Percent of Rep Cost', and 'Spiff 2', each with a dropdown menu and a text box. The 'Total Comm' section at the bottom right shows a value of \$29,840.75.

Field	Value	Multiplier
Primary Rep	\$28,348.71	0.2
Split Rep 1	\$1,492.04	0.2
Split Rep 2	\$0.00	0.00%
Referral Fee	\$0.00	
Production Print	\$0.00	
IT Rep	\$0.00	
Service Tech Referral	\$0.00	
Percent of Rep Cost	\$0.00	
Percent of Rep Cost		
Spiff 2	\$0.00	
Total Comm	\$29,840.75	

How To: Set Up Recurring Commissions For An Order

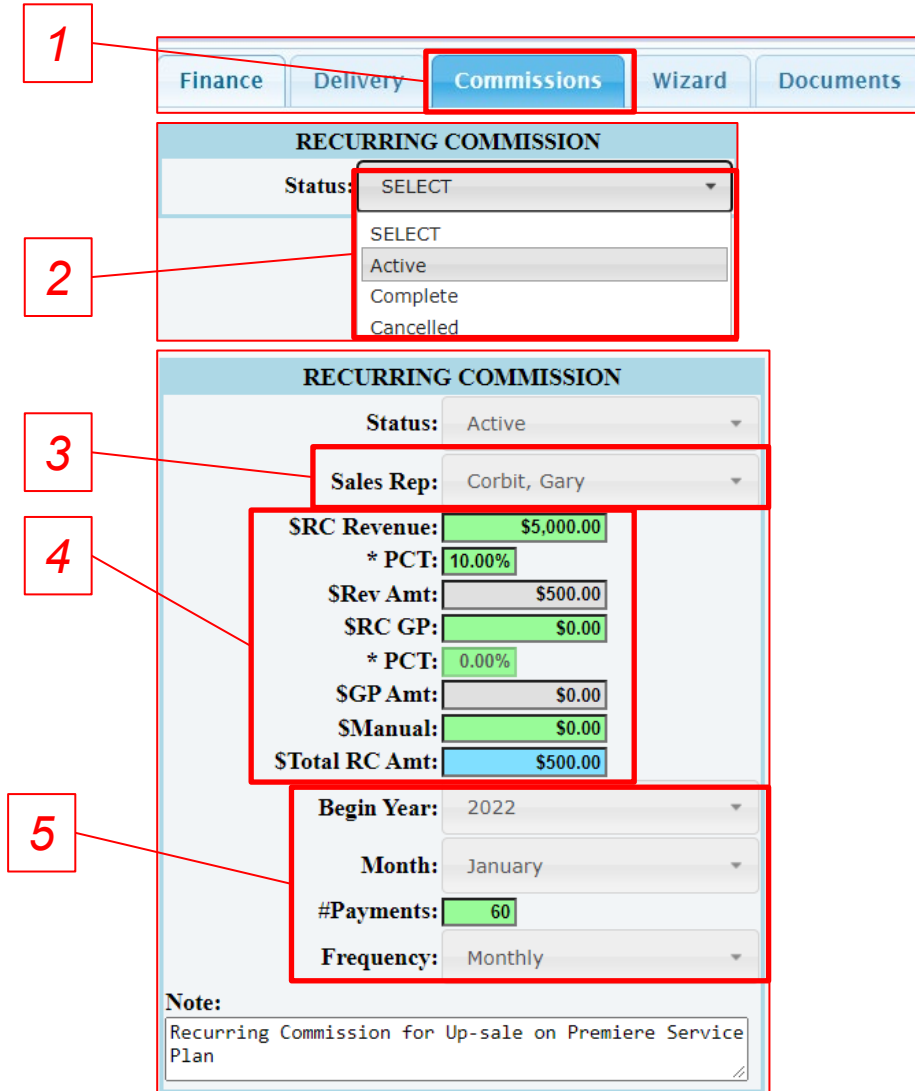
It is possible to process recurring commissions for any order.

To activate recurring commissions:

1. Navigate to the Commissions tab
2. Select *Active* from the *Status* drop-down button *Note: the dialogue will expand to reveal more information*
3. Select the sales rep who is to receive recurring commission from the *Sales Rep* drop-down
4. Enter the revenue information for this recurring commission
5. Select a frequency and start date for this recurring commission payout

Quick Tips:

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



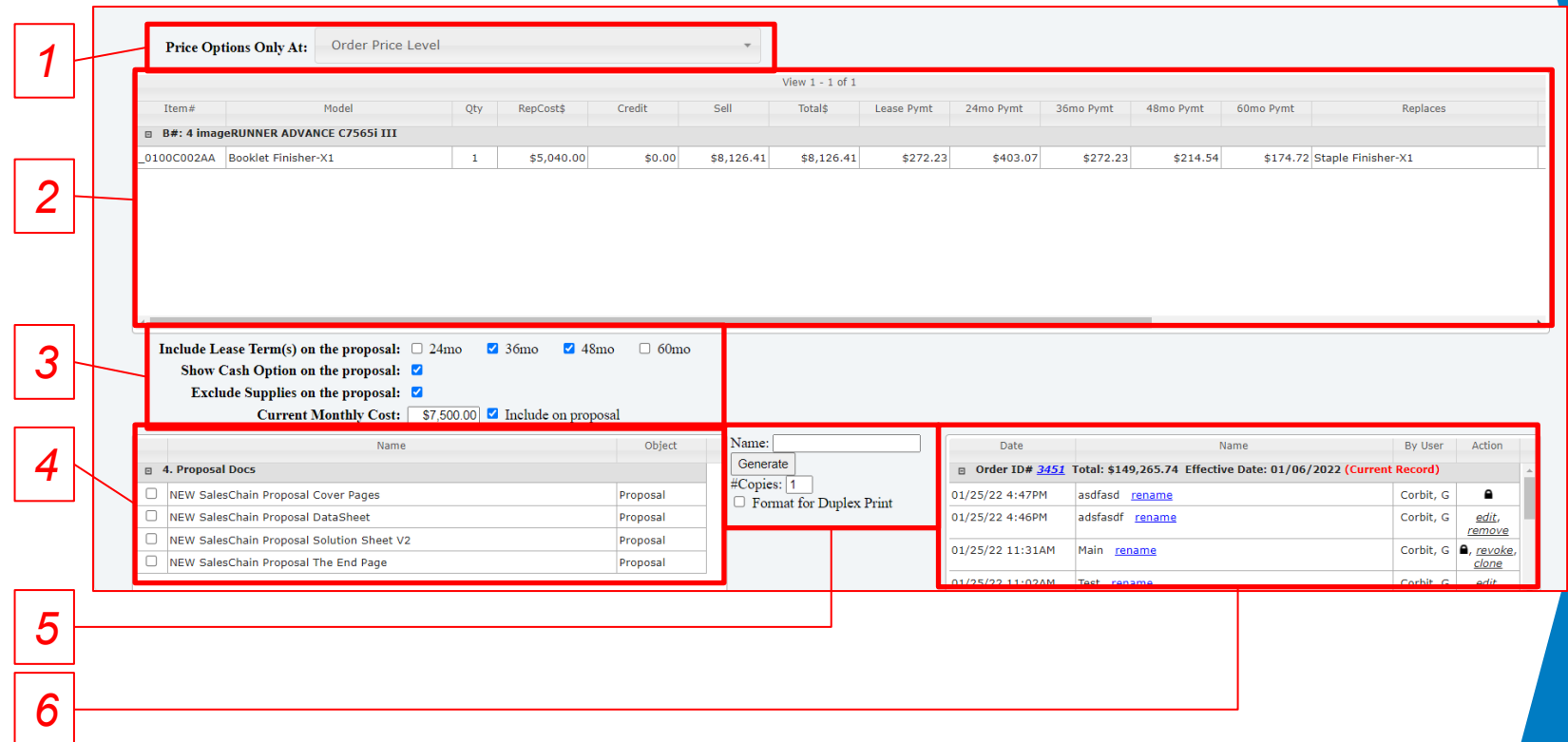
The screenshot shows the 'Commissions' tab in the SalesChain interface. The 'RECURRING COMMISSION' dialog is open, and the 'Status' dropdown is set to 'Active'. The 'Sales Rep' dropdown is set to 'Corbit, Gary'. The 'SRC Revenue' is \$5,000.00, and the '* PCT' is 10.00%, resulting in a '\$Rev Amt' of \$500.00. The 'SRC GP' is \$0.00, and the '* PCT' is 0.00%, resulting in a '\$GP Amt' of \$0.00. The '\$Manual' is \$0.00, and the '\$Total RC Amt' is \$500.00. The 'Begin Year' is 2022, the 'Month' is January, the '#Payments' is 60, and the 'Frequency' is Monthly. A note at the bottom reads: 'Recurring Commission for Up-sale on Premiere Service Plan'.

Proposal and Order Pricing: Wizard Tab

The Wizard Tab allows you to generate custom proposal documents. You can customize the information and pages that are included on proposal documents.

Key:

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



1 Price Options Only At: Order Price Level

2 View 1 - 1 of 1

Item#	Model	Qty	RepCost\$	Credit	Sell	Total\$	Lease Pymt	24mo Pymt	36mo Pymt	48mo Pymt	60mo Pymt	Replaces
B#: 4 imageRUNNER ADVANCE C7565i III												
0100C002AA	Booklet Finisher-X1	1	\$5,040.00	\$0.00	\$8,126.41	\$8,126.41	\$272.23	\$403.07	\$272.23	\$214.54	\$174.72	Staple Finisher-X1

3 Include Lease Term(s) on the proposal: ☐ 24mo ☒ 36mo ☒ 48mo ☐ 60mo
 Show Cash Option on the proposal: ☒
 Exclude Supplies on the proposal: ☒
 Current Monthly Cost: \$7,500.00 ☒ Include on proposal

4

Name	Object
4. Proposal Docs	
<input type="checkbox"/> NEW SalesChain Proposal Cover Pages	Proposal
<input type="checkbox"/> NEW SalesChain Proposal DataSheet	Proposal
<input type="checkbox"/> NEW SalesChain Proposal Solution Sheet V2	Proposal
<input type="checkbox"/> NEW SalesChain Proposal The End Page	Proposal

Name:
 Generate
 #Copies: 1
☐ Format for Duplex Print

Date	Name	By User	Action
Order ID# 3451 Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/25/22 4:47PM	asdfasd	Corbit, G	rename
01/25/22 4:46PM	adsfasdf	Corbit, G	rename
01/25/22 11:31AM	Main	Corbit, G	rename
01/25/22 11:02AM	Test	Corbit, G	rename

5

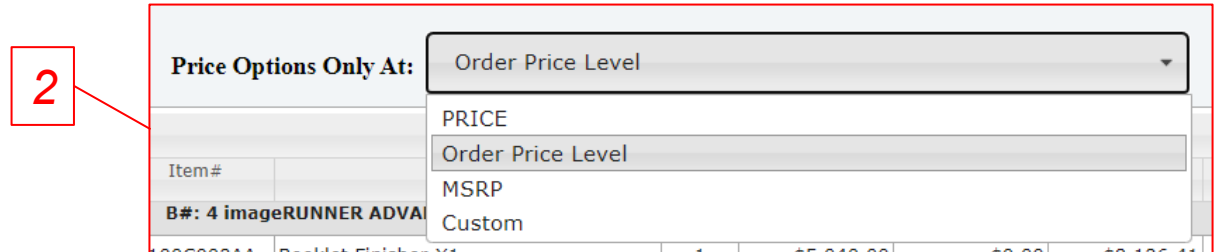
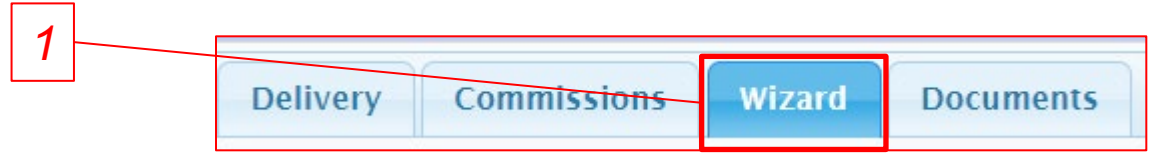
6

How To: Change Pricing Levels for Optional Accessories

It is possible to price optional accessories at the same, or at a different value than the order's pricing rules dictate. This can help you make optional up-sales more appealing in some cases.

To change the optional accessory pricing level:

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



Quick Tip:

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

Price Options Only At: Custom					
Item#	Model	Qty	RepCost\$	Credit	Sell
B#: 4 imageRUNNER ADVANCE C7565i III					
0100C002AA	Booklet Finisher-X1	1	\$5,040.00	\$0.00	8126.41

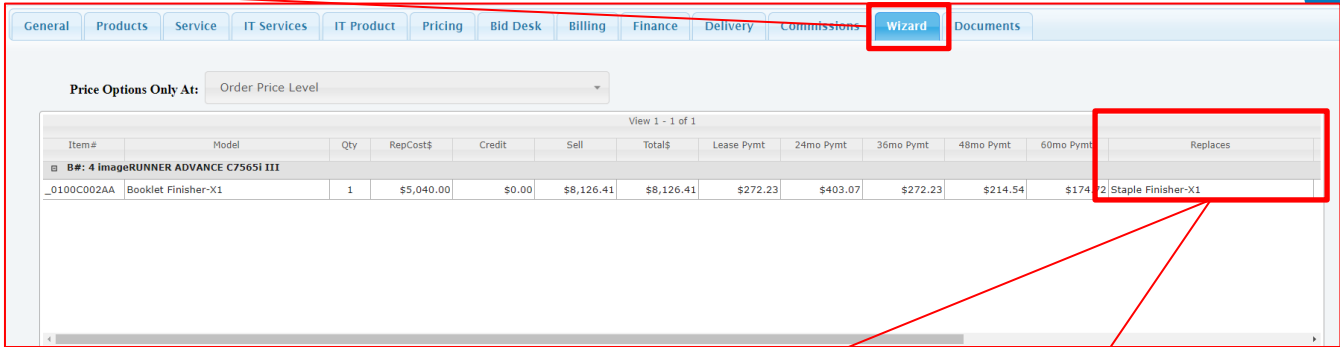
How To: Associate Optional Accessories For Upgrade

If an optional accessory upgrade is meant to replace an accessory that is priced on the deal, you can associate the upgrade accessory in the Wizard tab to calculate and present the appropriate incremental upgrade cost on your proposal.

To associate an optional upgrade with a priced accessory:

1. Navigate to the Wizard tab
2. Select the accessory that this optional upgrade is meant to replace from the drop down in the *Replaces* column

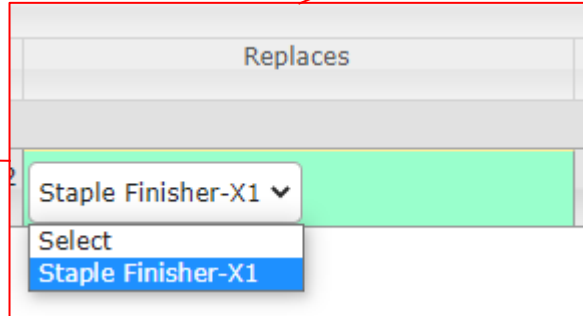
1



Price Options Only At: Order Price Level

Item#	Model	Qty	RepCost\$	Credit	Sell	Total\$	Lease Pymt	24mo Pymt	36mo Pymt	48mo Pymt	60mo Pymt	Replaces
View 1 - 1 of 1												
B#: 4 ImagerUNNER ADVANCE C7565I IIII												
_0100C002AA	Booklet Finisher-X1	1	\$5,040.00	\$0.00	\$8,126.41	\$8,126.41	\$272.23	\$403.07	\$272.23	\$214.54	\$174.23	2 Staple Finisher-X1

2



Replaces

Staple Finisher-X1 ▼

Select

Staple Finisher-X1

How To: Customize the Information Shown on a Proposal

The proposal wizard makes it possible to customize what information is displayed or redacted from your proposal's *Solution Sheet*.

Note: For instructions on generating a proposal after you have made these customizations, see page 164.

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

1. Navigate to the Wizard tab
2. Use the check boxes below the optional accessories table to determine what information will be displayed
3. Click the red flashing Save button

Quick Tip:

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

1

Delivery Commissions **Wizard** Documents

2

Include Lease Term(s) on the proposal: ☐ 24mo ☒ 36mo ☒ 48mo ☐ 60mo

Show Cash Option on the proposal: ☒

Exclude Supplies on the proposal: ☒

Current Monthly Cost: \$7,500.00 ☒ Include on proposal

3

Breakdown Book **Save** Remove

		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

How To: Generate a Proposal

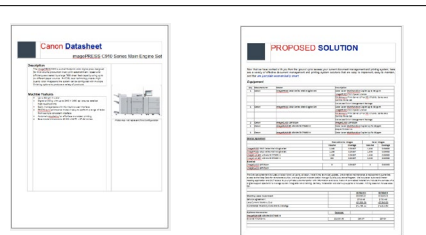
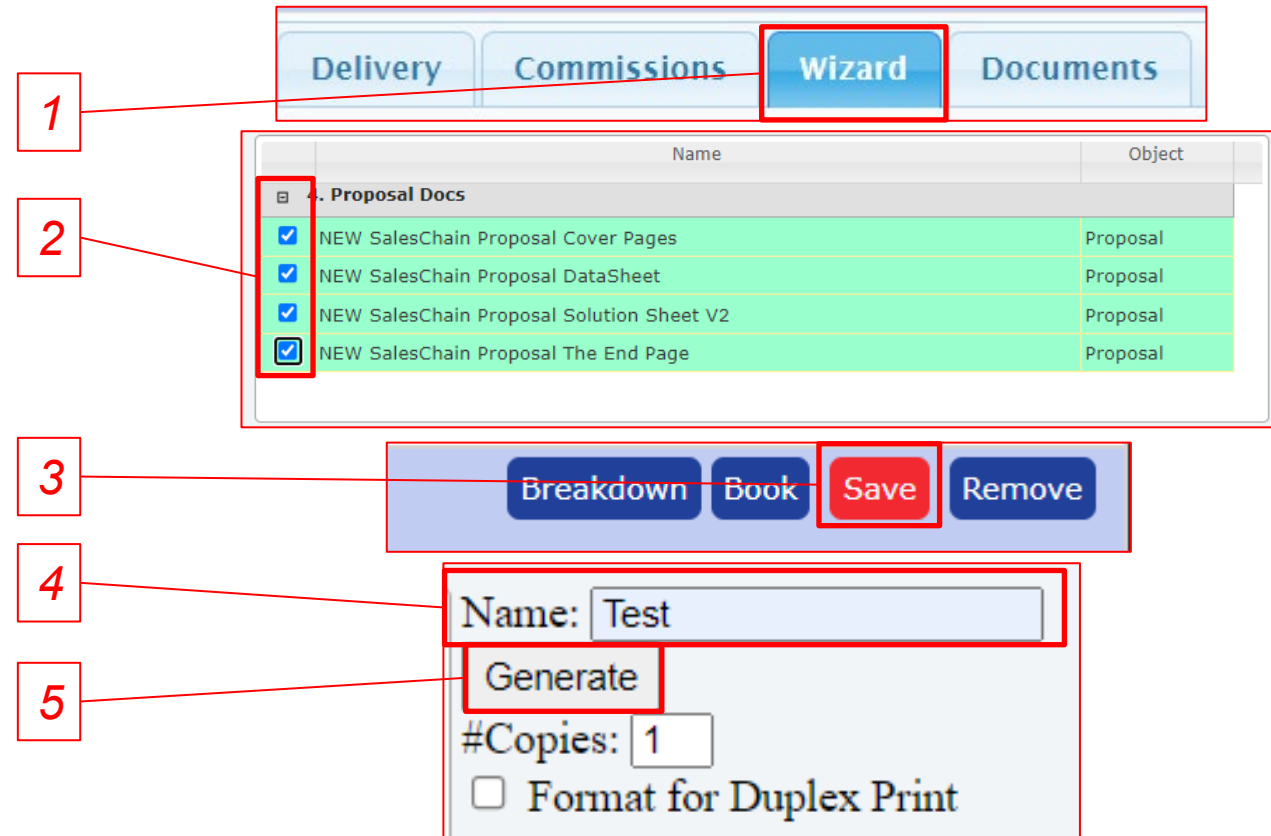
Once you have customized the information you want to display on your proposal ([see page 163](#)) you are able to generate a proposal document.

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.

The screenshot shows the 'Wizard' tab selected in the top navigation bar. Below it, a table titled 'Proposal Docs' lists four items, all of which are checked. At the bottom, there is a 'Save' button (highlighted in red) and a 'Generate' button. A form field for 'Name' contains the text 'Test'. Below the 'Generate' button, there is a '#Copies' field set to '1' and a checkbox for 'Format for Duplex Print'.

Name	Object
NEW SalesChain Proposal Cover Pages	Proposal
NEW SalesChain Proposal DataSheet	Proposal
NEW SalesChain Proposal Solution Sheet V2	Proposal
NEW SalesChain Proposal The End Page	Proposal

Buttons: Breakdown, Book, **Save**, Remove

Name: Test

Generate

#Copies: 1

☐ Format for Duplex Print


Proposal and Order Pricing: Documents Tab

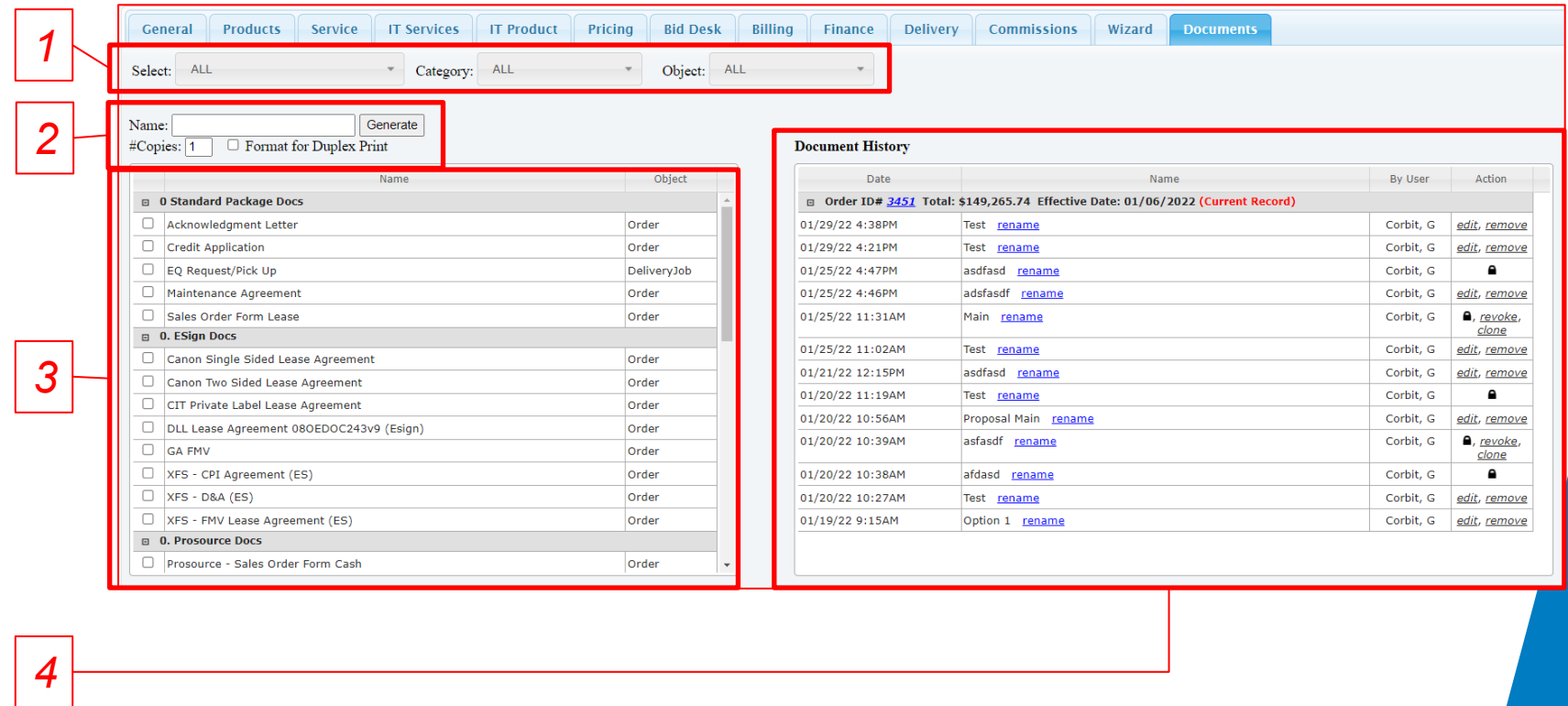
The Documents tab allows you to generate all relevant internal, delivery, and legal documents for this proposal or order.

Key:

- 1) Filter documents shown in the selection box
- 2) Name and generate document packages
- 3) Select documents from this window to include them in a document package.
- 4) Document history, all generated documents 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.



The screenshot shows the 'Documents' tab in the SalesChain interface. The top navigation bar includes tabs for General, Products, Service, IT Services, IT Product, Pricing, Bid Desk, Billing, Finance, Delivery, Commissions, Wizard, and Documents. The Documents tab is active.

Callout 1 points to the filter section with dropdowns for Select (ALL), Category (ALL), and Object (ALL).

Callout 2 points to the document generation section with fields for Name, #Copies (1), and a checkbox for Format for Duplex Print, along with a Generate button.

Callout 3 points to the document selection table, which lists various document types under categories like Standard Package Docs, ESign Docs, and Prosourse Docs. Each row has a checkbox and an Object column.

Callout 4 points to the Document History table, which displays a list of generated documents with columns for Date, Name, By User, and Action. The Action column includes links for edit, remove, and revoke, along with a lock icon for documents that are locked.

Date	Name	By User	Action
Order ID# 3451 Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/29/22 4:38PM	Test rename	Corbit, G	edit , remove
01/29/22 4:21PM	Test rename	Corbit, G	edit , remove
01/25/22 4:47PM	asdfsad rename	Corbit, G	
01/25/22 4:46PM	adsfasdf rename	Corbit, G	edit , remove
01/25/22 11:31AM	Main rename	Corbit, G	, revoke , clone
01/25/22 11:02AM	Test rename	Corbit, G	edit , remove
01/21/22 12:15PM	asdfsad rename	Corbit, G	edit , remove
01/20/22 11:19AM	Test rename	Corbit, G	
01/20/22 10:56AM	Proposal Main rename	Corbit, G	edit , remove
01/20/22 10:39AM	asfasdf rename	Corbit, G	, revoke , clone
01/20/22 10:38AM	afdasd rename	Corbit, G	
01/20/22 10:27AM	Test rename	Corbit, G	edit , remove
01/19/22 9:15AM	Option 1 rename	Corbit, G	edit , remove

You are able to generate any documents related to this order from the Documents tab. You can generate single documents or create a package by selecting multiple documents.

To generate a document package:

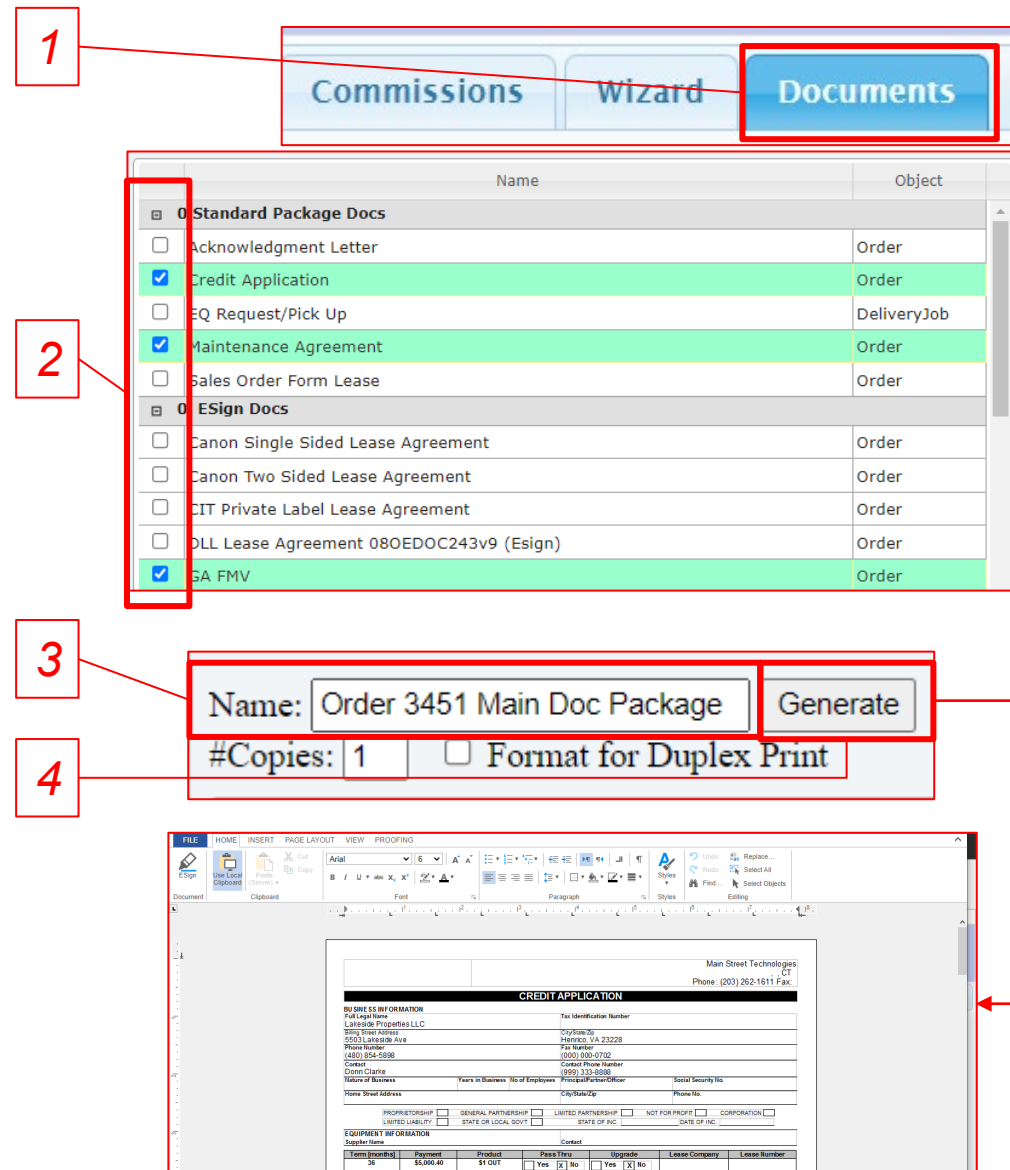
1. Navigate to the *Documents* tab
2. Select the documents you would like to include in your document package. *Note: SalesChain imports your document templates, so the available documents will vary depending on system configuration*
3. Give your proposal document package a name that is easy to remember
4. Click *Generate* *Note: This will open a new window with a document editor where you can view, download, or print your document package*

Quick Tips:

- While your specific documents may vary, there will usually be headers for both e-Sign and non e-Sign documents. Be sure to generate the e-Sign versions of documents if you would like to sign them electronically. *Important: you CANNOT mix and match e-sign and non e-sign documents*
- If your document package contains e-signable documents, the *Sign* button will appear. If your document package contains no e-signable documents, the *Sign* button will not appear.



How To: Generate a Document Package



1 Click the **Documents** tab.

2 Select the documents you would like to include in your document package. *Note: SalesChain imports your document templates, so the available documents will vary depending on system configuration*

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*

The resulting document editor window shows a **CREDIT APPLICATION** form with fields for:

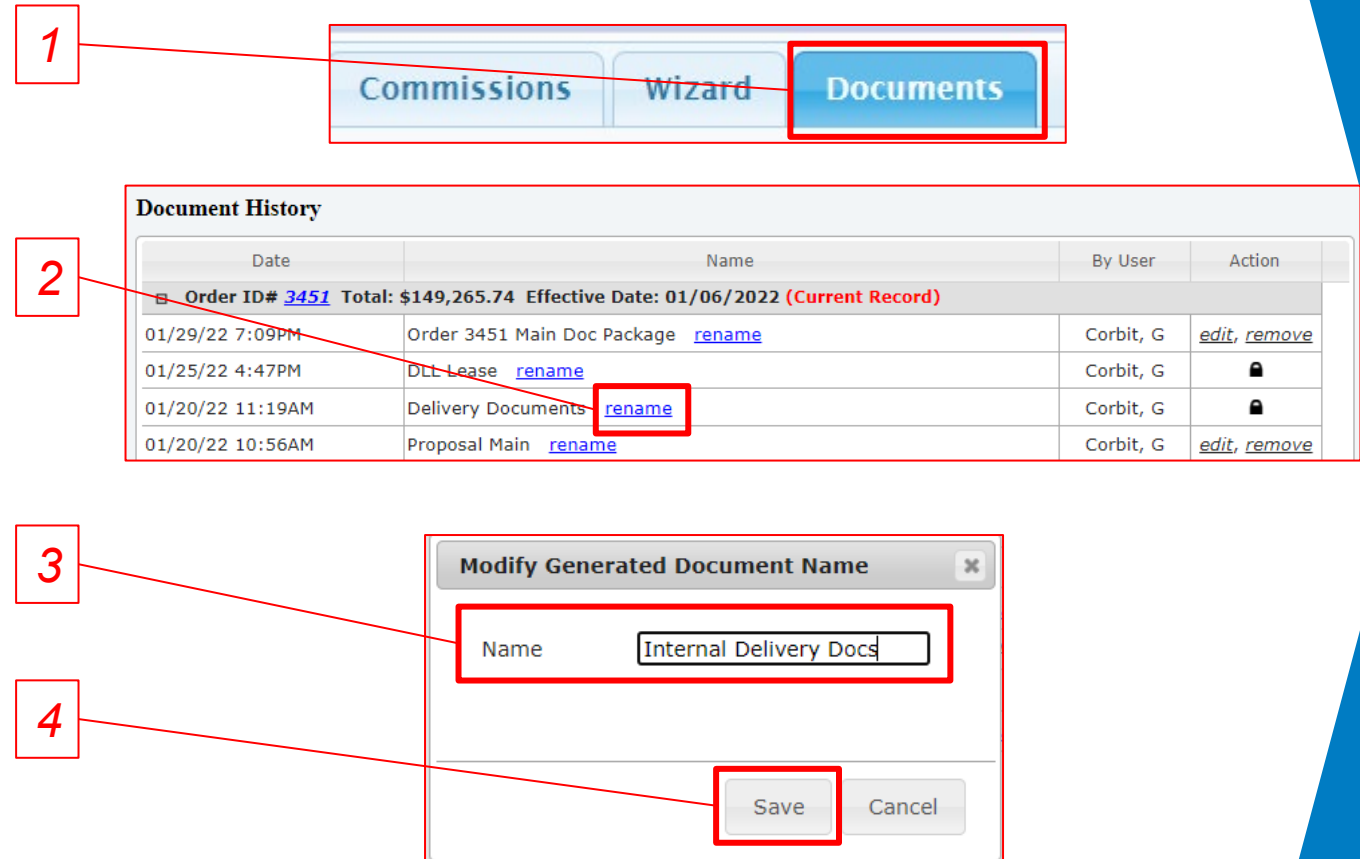
- BU BUREAU INFORMATION:** Full Legal Name, Tax Identification Number, Company Address, Phone Number, Email Address, Contact Name, Nature of Business, Years in Business, No. of Employees, Principal/Person Officer, Social Security No.
- EQUIPMENT INFORMATION:** Equipment Item, Payment, \$1 OUT, \$1 IN, Lease Company, Lease Number.

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*



The screenshot illustrates the steps to rename a document package. It shows the 'Documents' tab selected in the top navigation bar. Below, the 'Document History' table lists several document packages. The 'Delivery Documents' package is highlighted, and its 'rename' link is circled. A red box labeled '2' points to this link. The 'Modify Generated Document Name' dialog box is open, showing the 'Name' text box with the value 'Internal Delivery Docs' and the 'Save' button. Red boxes labeled '3' and '4' point to the text box and the 'Save' button, respectively.

Date	Name	By User	Action
Order ID# 3451 Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/29/22 7:09PM	Order 3451 Main Doc Package rename	Corbit, G	edit , remove
01/25/22 4:47PM	DLL Lease rename	Corbit, G	lock
01/20/22 11:19AM	Delivery Documents rename	Corbit, G	lock
01/20/22 10:56AM	Proposal Main rename	Corbit, G	edit , remove

Modify Generated Document Name


Name

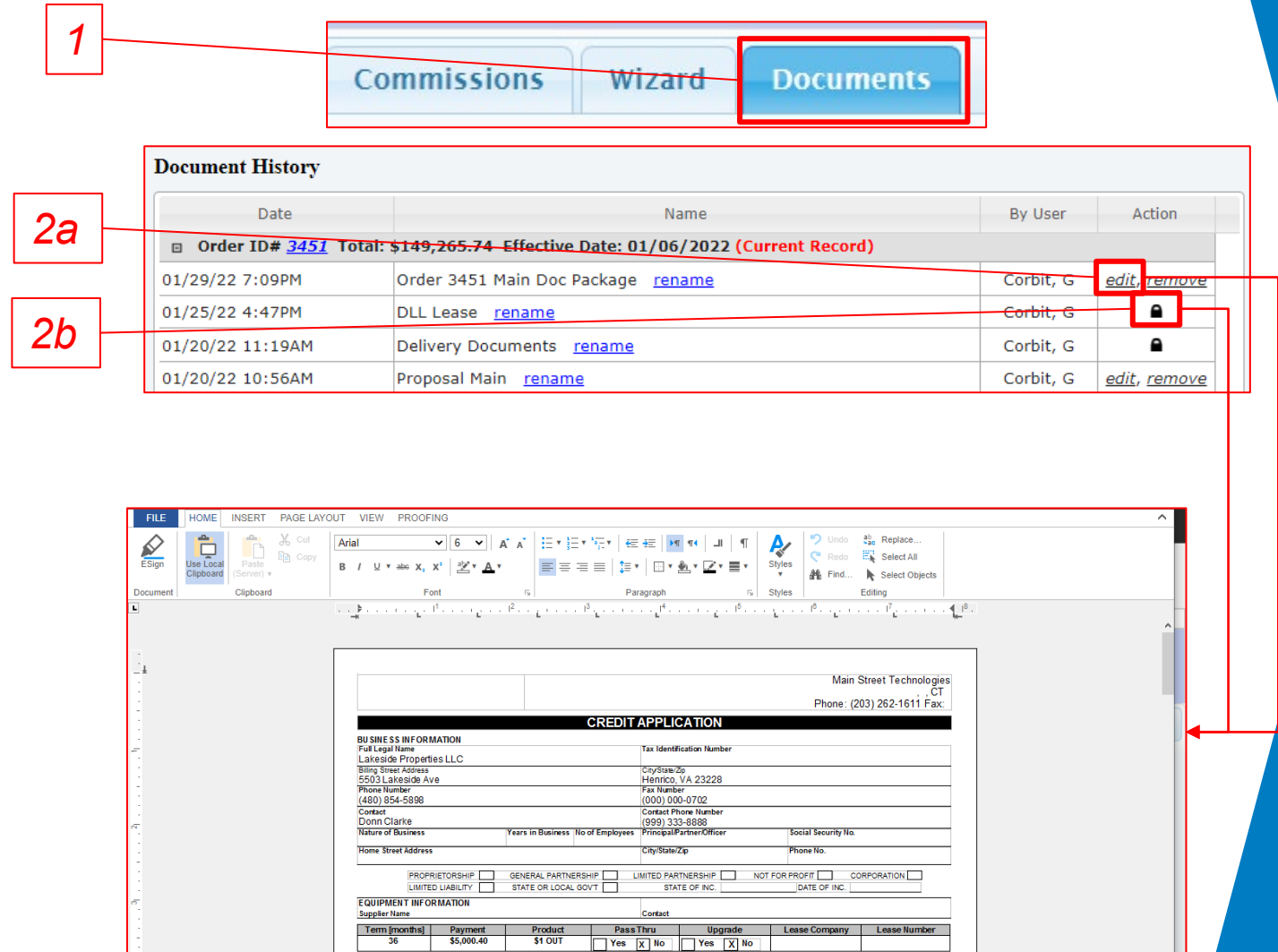
How To: View and Edit a Document Package

You may view any document packages you have generated and edit those which have not been locked for e-Sign. This will open the document package in a document editor. See [page 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 



1 Points to the **Documents** tab in the top navigation bar.

2a Points to the **edit** link in the **Action** column of the **Document History** table.

2b Points to the lock icon in the **Action** column of the **Document History** table.

Date	Name	By User	Action
Order ID# 3451 Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/29/22 7:09PM	Order 3451 Main Doc Package rename	Corbit, G	edit remove
01/25/22 4:47PM	DLL Lease rename	Corbit, G	
01/20/22 11:19AM	Delivery Documents rename	Corbit, G	
01/20/22 10:56AM	Proposal Main rename	Corbit, G	edit remove

The screenshot also shows a document editor window with a **CREDIT APPLICATION** form. The form includes sections for **BUSINESS INFORMATION** and **EQUIPMENT INFORMATION**.

BUSINESS INFORMATION

Full Legal Name Lakeside Properties LLC	Tax Identification Number City/State/Zip Henrico, VA 23228
Billing Street Address 5503 Lakeside Ave	Phone Number (480) 854-5898
Contact Donn Clarke	Contact Phone Number (999) 333-8888
Nature of Business	Years in Business / No of Employees
Home Street Address	City/State/Zip / Phone No.

EQUIPMENT INFORMATION

Supplier Name	Contact
Term (months)	Payment
36	\$5,000.40
Product	Pass Thru
\$1 OUT	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Upgrade	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Lease Company	Lease Number

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.

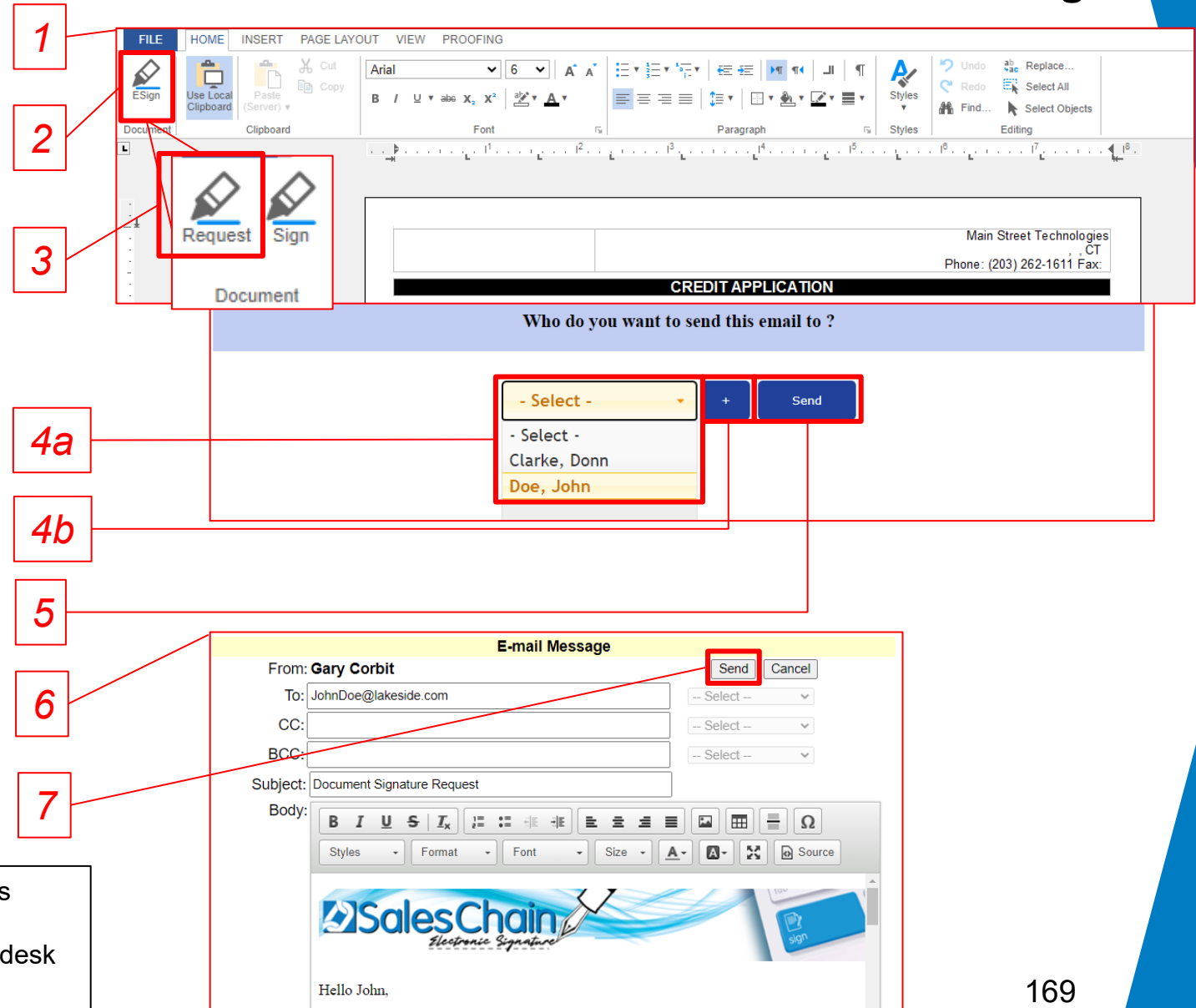
To request an electronic signature via email:

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: Send a Document for e-Sign



The screenshot illustrates the steps for sending a document for e-signature. It shows the document editor interface with the 'E-Sign' button in the 'FILE' menu. A pop-up dialog for selecting contacts is shown, and a second pop-up dialog for composing the email message is displayed. The document body shows the 'SalesChain Electronic Signature' logo and the text 'Hello John,'.

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:

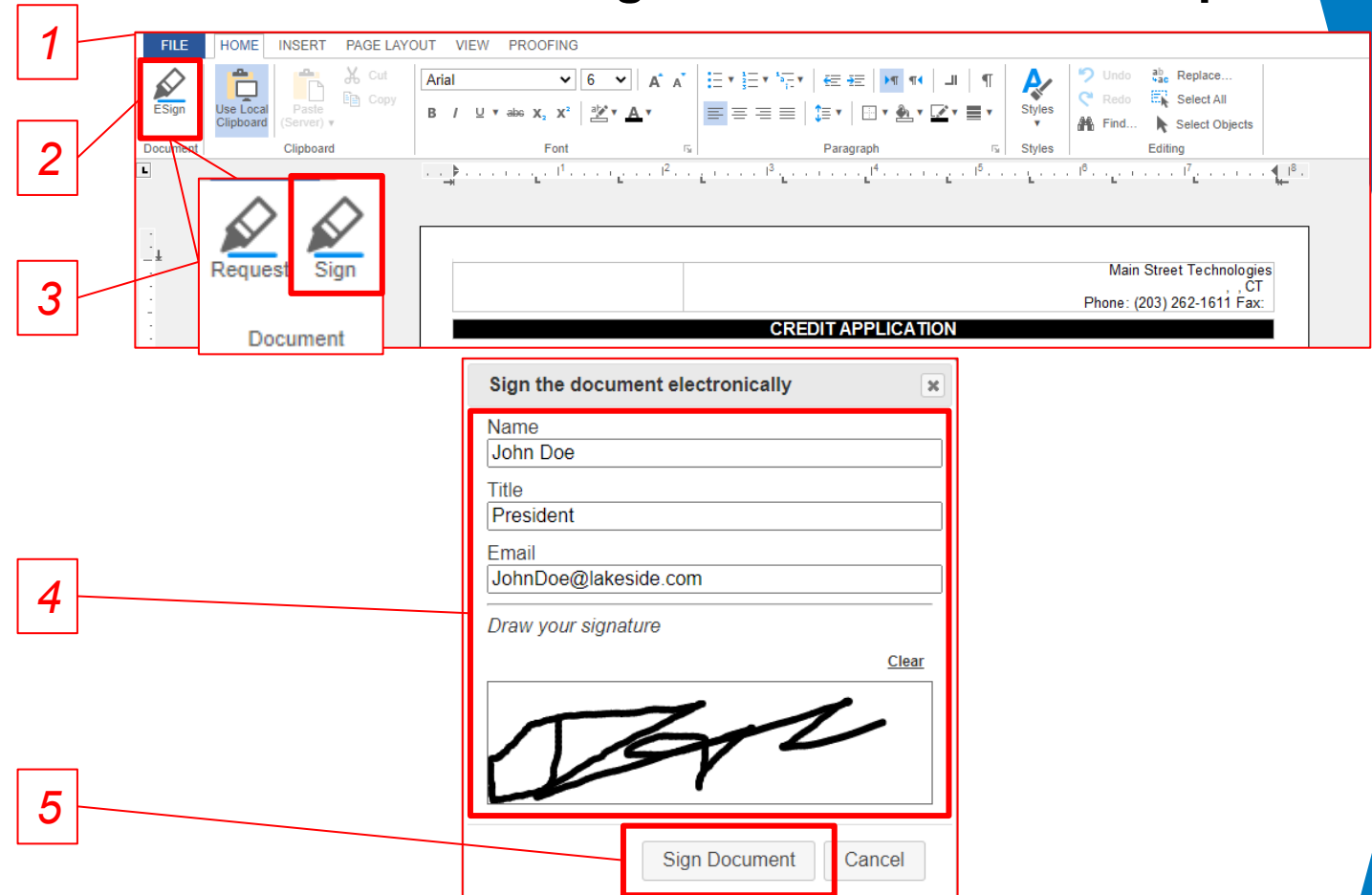
1. Open or generate the desired document package using the methods outlined on pages [166](#) and [168](#)
2. Click the *E-Sign* button. *Note: this will lock the document package and prevent you from editing it. Be sure to make any changes **before** clicking the E-Sign button.*
3. Click the *Sign* 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: e-Sign a Document on the Spot



How To: Revoke a Signature Request

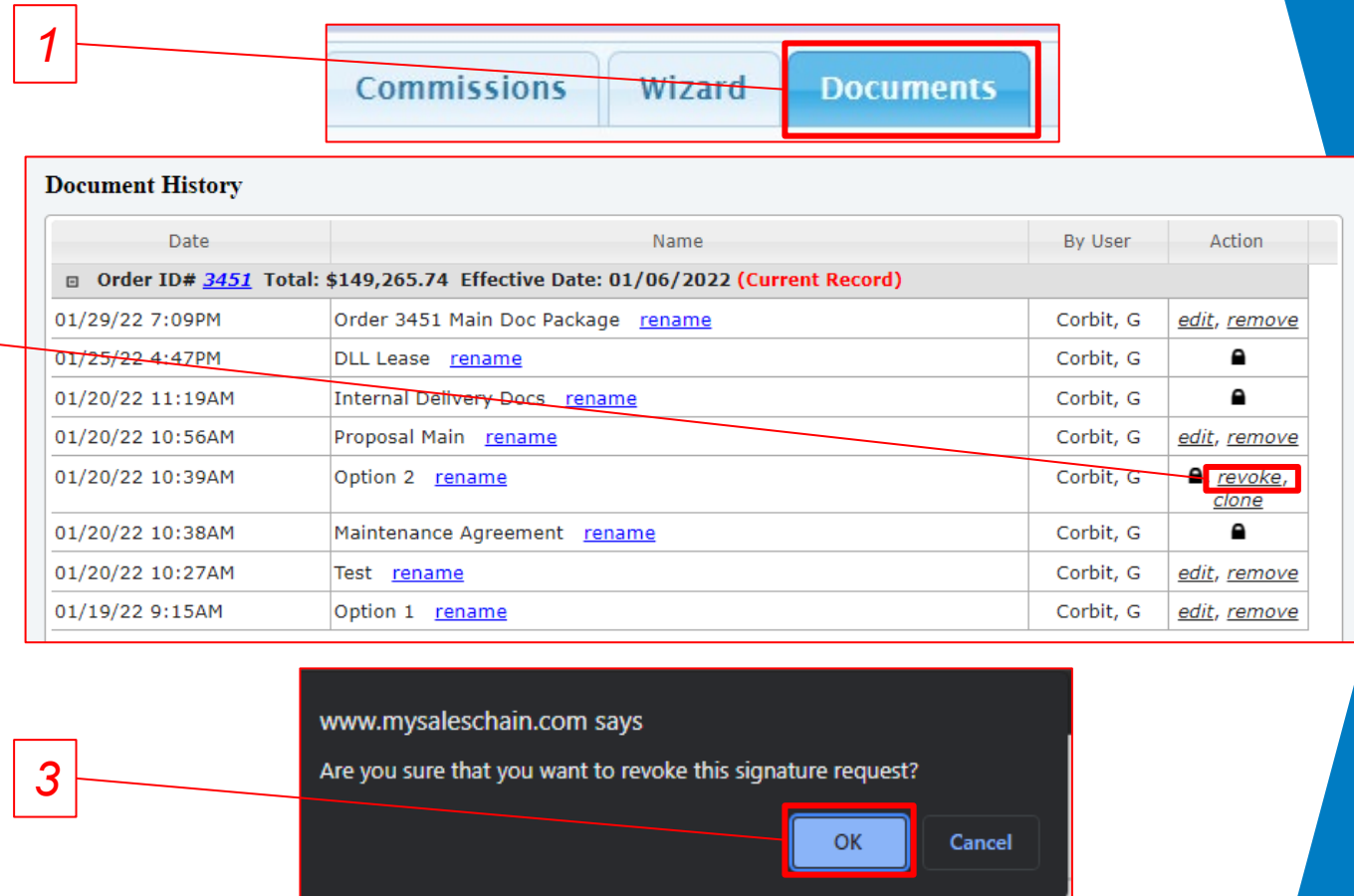
You are able to revoke a signature request if the person from whom you have requested an electronic signature has not signed the document package yet.

To revoke a document package that has been sent for e-Sign:

1. Navigate to the *Documents* tab
2. Click the black *revoke* link next to the document package you would like to revoke.
3. In the pop-up dialogue, click *OK*

Quick Tips:

The *revoke* link will only appear in the specific circumstance that a document package has been sent but not yet signed. If the document package has already been signed, it will be fully locked and cannot be revoked.



Document History

Date	Name	By User	Action
Order ID# 3451 Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/29/22 7:09PM	Order 3451 Main Doc Package rename	Corbit, G	edit , remove
01/25/22 4:47PM	DLL Lease rename	Corbit, G	
01/20/22 11:19AM	Internal Delivery Docs rename	Corbit, G	
01/20/22 10:56AM	Proposal Main rename	Corbit, G	edit , remove
01/20/22 10:39AM	Option 2 rename	Corbit, G	revoke , clone
01/20/22 10:38AM	Maintenance Agreement rename	Corbit, G	
01/20/22 10:27AM	Test rename	Corbit, G	edit , remove
01/19/22 9:15AM	Option 1 rename	Corbit, G	edit , remove

www.mysaleschain.com says
Are you sure that you want to revoke this signature request?

OK **Cancel**

How To: Clone a Document Package

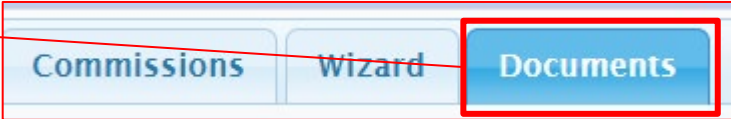
You are able to clone a document package which has been sent for e-Sign if the person from whom you have requested an electronic signature has not signed the document package yet.

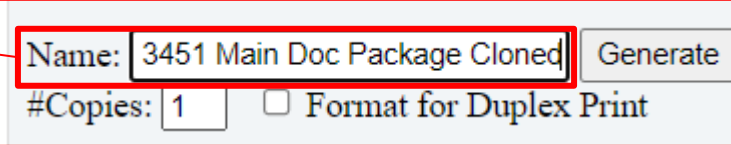
To clone a document package:

1. Navigate to the *Documents* tab
2. **Important:** Enter a name for this cloned document package in the *Name* text box
3. Click the black *clone* link next to the document package which you would like to duplicate.

Quick Tips:

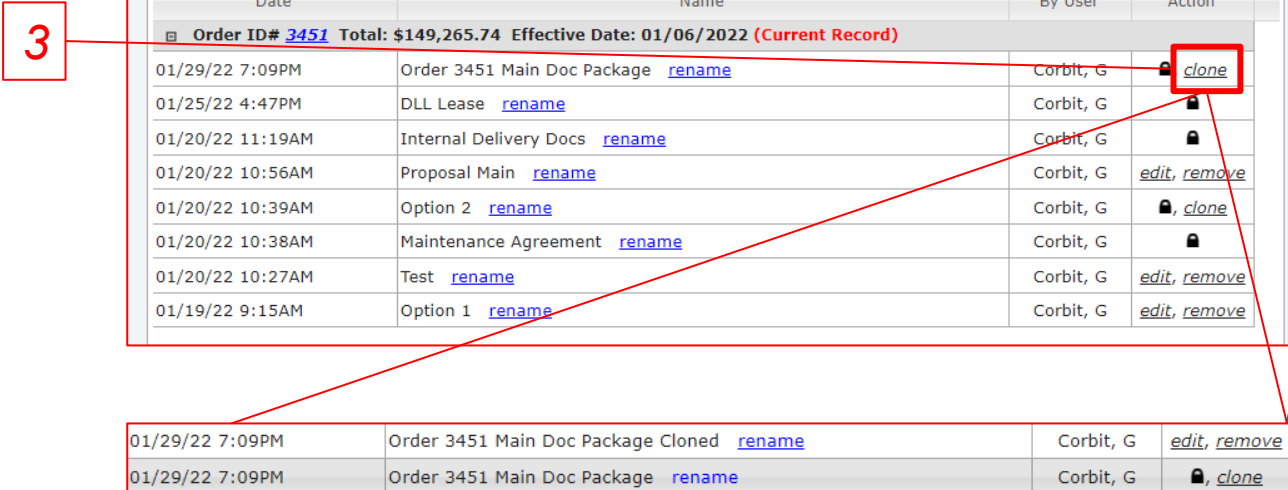
- The *revoke* and *clone* link will both appear when a document has been sent for signature but has not yet been signed.
- The cloned document will no longer be locked from editing, this method is useful for making changes to e-Sign documents without re-creating the whole document package.

1. 

2. 

Name: 3451 Main Doc Package Cloned Generate

#Copies: 1 ☐ Format for Duplex Print

3. 

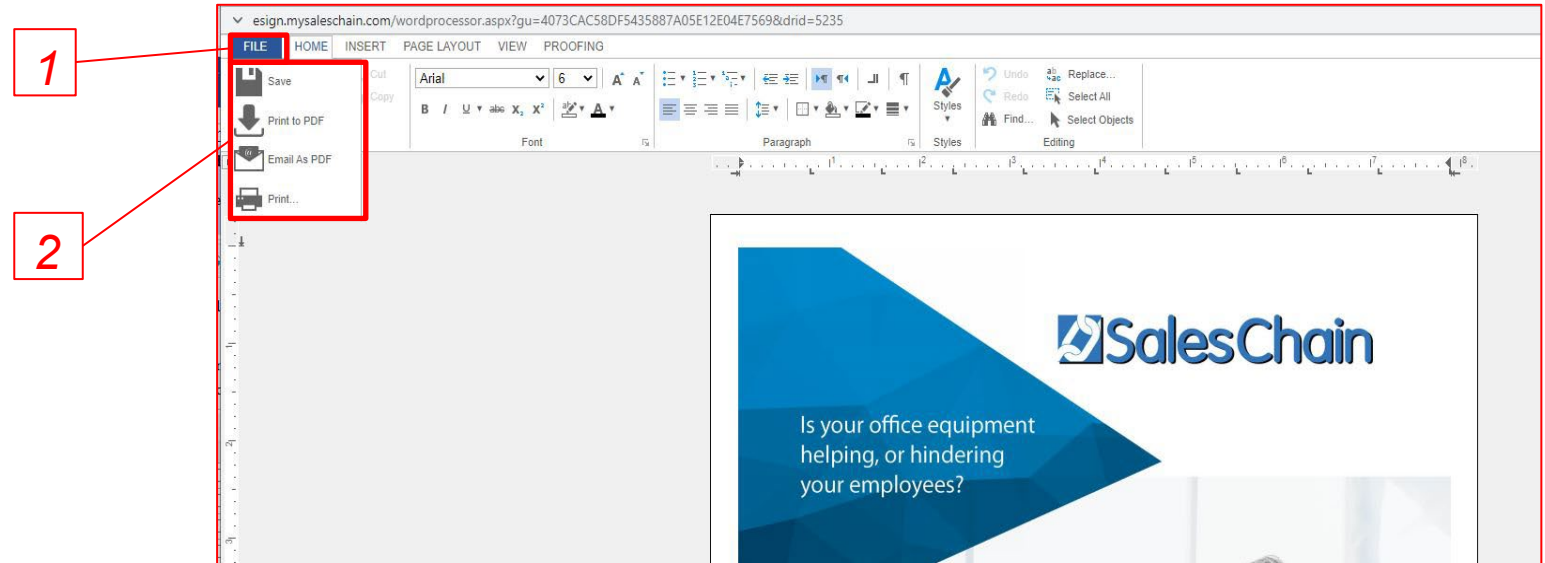
Date	Name	By User	Action
Order ID# 3451 Total: \$149,265.74 Effective Date: 01/06/2022 (Current Record)			
01/29/22 7:09PM	Order 3451 Main Doc Package rename	Corbit, G	clone
01/25/22 4:47PM	DLL Lease rename	Corbit, G	clone
01/20/22 11:19AM	Internal Delivery Docs rename	Corbit, G	clone
01/20/22 10:56AM	Proposal Main rename	Corbit, G	edit , remove
01/20/22 10:39AM	Option 2 rename	Corbit, G	clone
01/20/22 10:38AM	Maintenance Agreement rename	Corbit, G	clone
01/20/22 10:27AM	Test rename	Corbit, G	edit , remove
01/19/22 9:15AM	Option 1 rename	Corbit, G	edit , remove
01/29/22 7:09PM	Order 3451 Main Doc Package Cloned rename	Corbit, G	edit , remove
01/29/22 7:09PM	Order 3451 Main Doc Package rename	Corbit, G	clone

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*



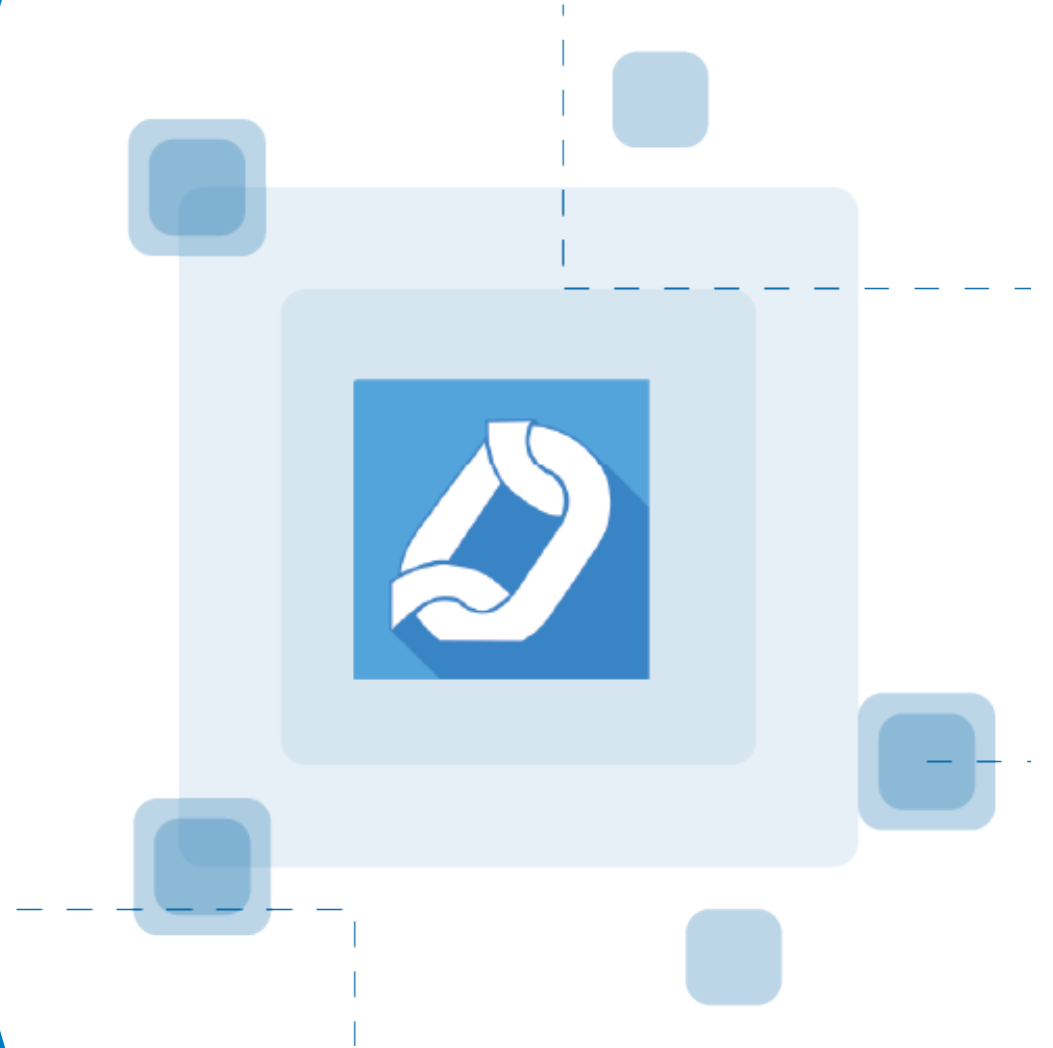
Quick Tips:

- 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:

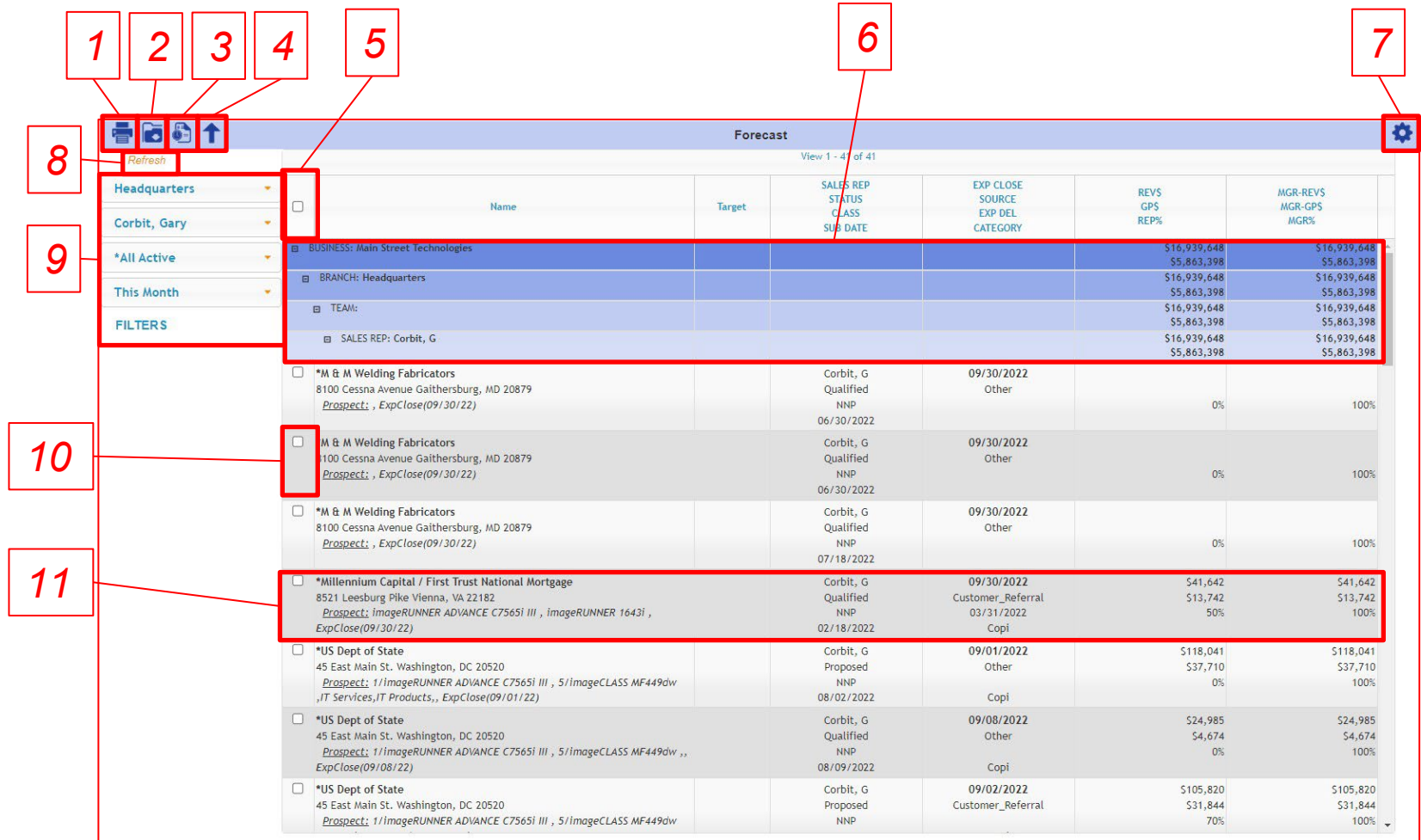
Forecasting Views and Tools for
Sales Representatives and
Managers



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



The screenshot shows the Forecast Desk interface. The top bar is labeled 'Forecast' and 'View 1 - 41 of 41'. The left sidebar contains a search filter section with 'Headquarters' and 'Corbit, Gary' selected. The main table displays a list of leads with columns for Name, Target, SALES REP STATUS CLASS SUB DATE, EXP CLOSE SOURCE EXP DEL CATEGORY, REVS GP\$ REP%, and MGR-REVS MGR-GP\$ MGR%. The table is filtered to show leads for 'Corbit, G' and 'M & M Welding Fabricators'. The table is expanded to show details for 'M & M Welding Fabricators' and 'Millennium Capital / First Trust National Mortgage'.

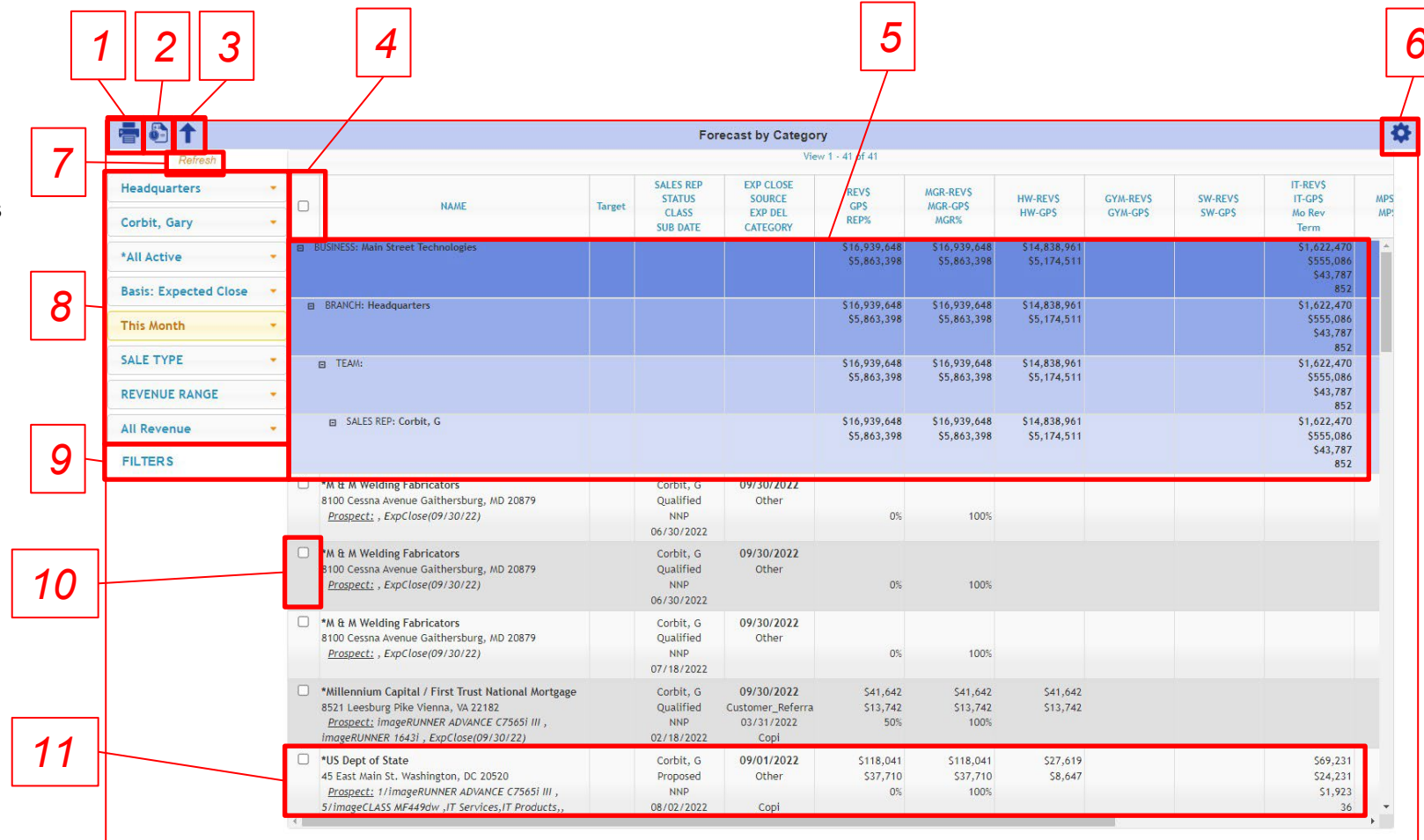
Name	Target	SALES REP STATUS CLASS SUB DATE	EXP CLOSE SOURCE EXP DEL CATEGORY	REVS GP\$ REP%	MGR-REVS MGR-GP\$ MGR%
BUSINESS: Main Street Technologies					
BRANCH: Headquarters					
TEAM:					
SALES REP: Corbit, G					
*M & M Welding Fabricators 8100 Cessna Avenue Gaithersburg, MD 20879 Prospect: , ExpClose(09/30/22)		Corbit, G Qualified NNP 06/30/2022	09/30/2022 Other	\$16,939,648 \$5,863,398 0%	\$16,939,648 \$5,863,398 100%
*M & M Welding Fabricators 100 Cessna Avenue Gaithersburg, MD 20879 Prospect: , ExpClose(09/30/22)		Corbit, G Qualified NNP 06/30/2022	09/30/2022 Other	\$16,939,648 \$5,863,398 0%	\$16,939,648 \$5,863,398 100%
*M & M Welding Fabricators 8100 Cessna Avenue Gaithersburg, MD 20879 Prospect: , ExpClose(09/30/22)		Corbit, G Qualified NNP 07/18/2022	09/30/2022 Other	\$16,939,648 \$5,863,398 0%	\$16,939,648 \$5,863,398 100%
*Millennium Capital / First Trust National Mortgage 8521 Leesburg Pike Vienna, VA 22182 Prospect: imageRUNNER ADVANCE C7565i III , S/imageRUNNER 1643i , ExpClose(09/30/22)		Corbit, G Qualified NNP 02/18/2022	09/30/2022 Customer_Referral 03/31/2022 Capi	\$41,642 \$13,742 50%	\$41,642 \$13,742 100%
*US Dept of State 45 East Main St. Washington, DC 20520 Prospect: 1/imageRUNNER ADVANCE C7565i III , S/imageCLASS MF449dw , IT Services, IT Products, , ExpClose(09/01/22)		Corbit, G Proposed NNP 08/02/2022	09/01/2022 Other Capi	\$118,041 \$37,710 0%	\$118,041 \$37,710 100%
*US Dept of State 45 East Main St. Washington, DC 20520 Prospect: 1/imageRUNNER ADVANCE C7565i III , S/imageCLASS MF449dw , ExpClose(09/08/22)		Corbit, G Qualified NNP 08/09/2022	09/08/2022 Other Capi	\$24,985 \$4,674 0%	\$24,985 \$4,674 100%
*US Dept of State 45 East Main St. Washington, DC 20520 Prospect: 1/imageRUNNER ADVANCE C7565i III , S/imageCLASS MF449dw		Corbit, G Proposed NNP	09/02/2022 Customer_Referral	\$105,820 \$31,844 70%	\$105,820 \$31,844 100%

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



The screenshot shows the 'Forecast by Category' interface. The top header bar is blue and contains the title 'Forecast by Category' and a 'View 1 - 41 of 41' indicator. On the left, there is a sidebar with various controls: a 'Refresh' button (1), a 'Print' icon (2), an 'Email' icon (3), a 'Select All' checkbox (4), and a 'Settings' gear icon (6). Below these are several dropdown menus for filtering: 'Headquarters' (7), 'Corbit, Gary', '*All Active', 'Basis: Expected Close', 'This Month', 'SALE TYPE', 'REVENUE RANGE', 'All Revenue', and 'FILTERS' (9). The main table displays forecast data with columns for NAME, Target, SALES REP STATUS, CLASS, SUB DATE, EXP CLOSE SOURCE, EXP DEL CATEGORY, REVS GP\$ REP%, MGR-REVS MGR-GP\$ MGR%, HW-REVS HW-GP\$, GYM-REVS GYM-GP\$, SW-REVS SW-GP\$, IT-REVS IT-GP\$ Mo Rev Term, and MPS IMP. The table is divided into summary rows (Business, Branch, Team, Sales Rep) and individual lead rows. Each lead row includes a checkbox (10) and detailed information about the lead, such as company name, address, contact person, and dates. The bottom row (11) shows a lead for 'US Dept of State' with a total revenue of \$1,923,364.

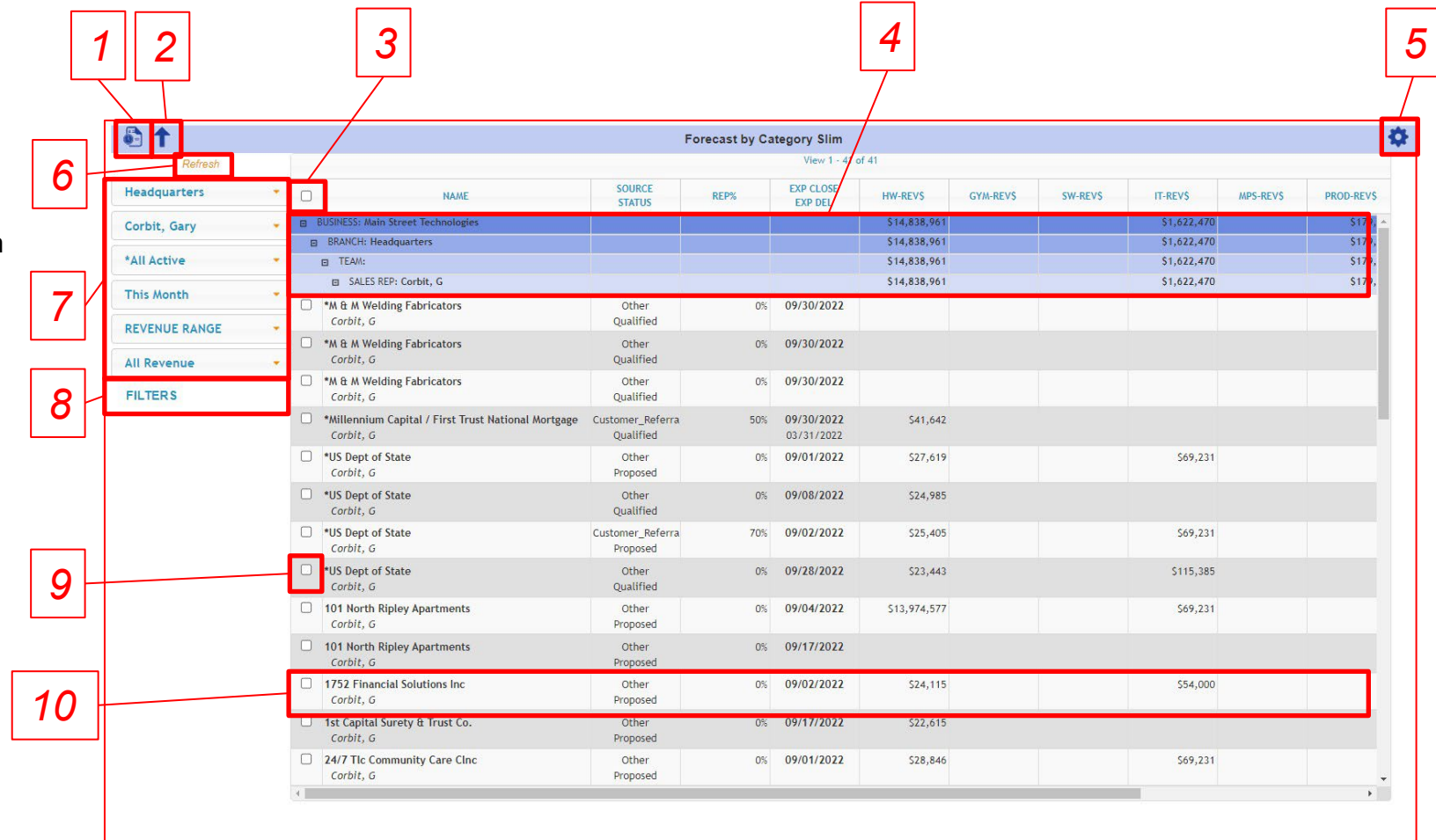
NAME	Target	SALES REP STATUS	CLASS	SUB DATE	EXP CLOSE SOURCE	EXP DEL CATEGORY	REVS GP\$ REP%	MGR-REVS MGR-GP\$ MGR%	HW-REVS HW-GP\$	GYM-REVS GYM-GP\$	SW-REVS SW-GP\$	IT-REVS IT-GP\$ Mo Rev Term	MPS IMP
*BUSINESS: Main Street Technologies													
							\$16,939,648 \$5,863,398	\$16,939,648 \$5,863,398	\$14,838,961 \$5,174,511			\$1,622,470 \$555,086 \$43,787 852	
*BRANCH: Headquarters													
							\$16,939,648 \$5,863,398	\$16,939,648 \$5,863,398	\$14,838,961 \$5,174,511			\$1,622,470 \$555,086 \$43,787 852	
*TEAM:													
							\$16,939,648 \$5,863,398	\$16,939,648 \$5,863,398	\$14,838,961 \$5,174,511			\$1,622,470 \$555,086 \$43,787 852	
*SALES REP: Corbit, G													
							\$16,939,648 \$5,863,398	\$16,939,648 \$5,863,398	\$14,838,961 \$5,174,511			\$1,622,470 \$555,086 \$43,787 852	
*M & M Welding Fabricators 8100 Cessna Avenue Gaithersburg, MD 20879 Prospect: , ExpClose(09/30/22)		Corbit, G Qualified NNP		09/30/2022 Other			0%	100%					
*M & M Welding Fabricators 8100 Cessna Avenue Gaithersburg, MD 20879 Prospect: , ExpClose(09/30/22)		Corbit, G Qualified NNP		09/30/2022 Other			0%	100%					
*M & M Welding Fabricators 8100 Cessna Avenue Gaithersburg, MD 20879 Prospect: , ExpClose(09/30/22)		Corbit, G Qualified NNP		09/30/2022 Other			0%	100%					
*Millennium Capital / First Trust National Mortgage 8521 Leesburg Pike Vienna, VA 22182 Prospect: ImageRUNNER ADVANCE C7565i III , ImageRUNNER 1643i , ExpClose(09/30/22)		Corbit, G Qualified NNP		09/30/2022 Customer_Referra 03/31/2022 Copl			\$41,642 \$13,742 50%	\$41,642 \$13,742 100%	\$41,642 \$13,742				
*US Dept of State 45 East Main St. Washington, DC 20520 Prospect: 1/ImageCLASS MF449dw ,IT Services,IT Products,, 5/ImageCLASS MF449dw ,IT Services,IT Products,,		Corbit, G Proposed NNP		09/01/2022 Other			\$118,041 \$37,710 0%	\$118,041 \$37,710 100%	\$27,619 \$8,647			\$69,231 \$24,231 \$1,923 36	

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



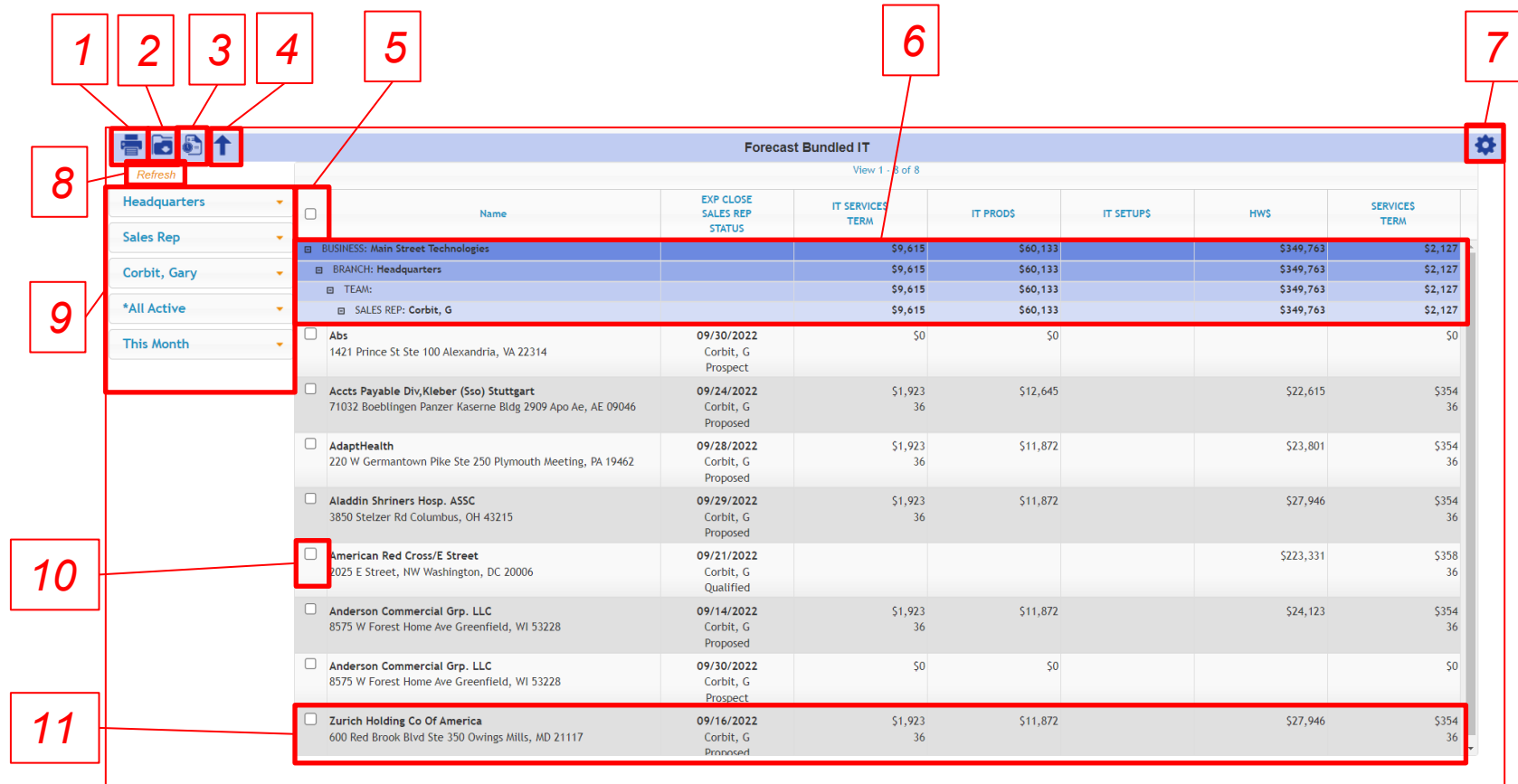
The screenshot shows the 'Forecast by Category Slim' interface. It includes a top navigation bar with a 'Refresh' button (1), a 'Collapse' icon (2), and a 'Settings' gear icon (5). A left sidebar contains search filters: 'Headquarters' (3), 'Corbit, Gary', '*All Active', 'This Month', 'REVENUE RANGE', 'All Revenue', and 'FILTERS' (8). The main table displays lead data with columns: NAME, SOURCE STATUS, REP%, EXP CLOSE, EXP DET, HW-REVS, GYM-REVS, SW-REVS, IT-REVS, MPS-REVS, and PROD-REVS. The table is divided into summary rows (4) and individual lead rows (10). A red box highlights a specific lead row (9).

NAME	SOURCE STATUS	REP%	EXP CLOSE	EXP DET	HW-REVS	GYM-REVS	SW-REVS	IT-REVS	MPS-REVS	PROD-REVS
Summary Rows (4)										
BUSINESS: Main Street Technologies					\$14,838,961			\$1,622,470		\$17,461,431
BRANCH: Headquarters					\$14,838,961			\$1,622,470		\$17,461,431
TEAM:					\$14,838,961			\$1,622,470		\$17,461,431
SALES REP: Corbit, G					\$14,838,961			\$1,622,470		\$17,461,431
Individual Leads (10)										
*M & M Welding Fabricators Corbit, G	Other Qualified	0%	09/30/2022							
*M & M Welding Fabricators Corbit, G	Other Qualified	0%	09/30/2022							
*M & M Welding Fabricators Corbit, G	Other Qualified	0%	09/30/2022							
*Millennium Capital / First Trust National Mortgage Corbit, G	Customer Referral Qualified	50%	09/30/2022	03/31/2022	\$41,642					
*US Dept of State Corbit, G	Other Proposed	0%	09/01/2022		\$27,619			\$69,231		
*US Dept of State Corbit, G	Other Qualified	0%	09/08/2022		\$24,985					
*US Dept of State Corbit, G	Customer Referral Proposed	70%	09/02/2022		\$25,405			\$69,231		
*US Dept of State Corbit, G	Other Qualified	0%	09/28/2022		\$23,443			\$115,385		
101 North Ripley Apartments Corbit, G	Other Proposed	0%	09/04/2022		\$13,974,577			\$69,231		
101 North Ripley Apartments Corbit, G	Other Proposed	0%	09/17/2022							
1752 Financial Solutions Inc Corbit, G	Other Proposed	0%	09/02/2022		\$24,115			\$54,000		
1st Capital Surety & Trust Co. Corbit, G	Other Proposed	0%	09/17/2022		\$22,615					
24/7 Tlc Community Care Cinc Corbit, G	Other Proposed	0%	09/01/2022		\$28,846			\$69,231		

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



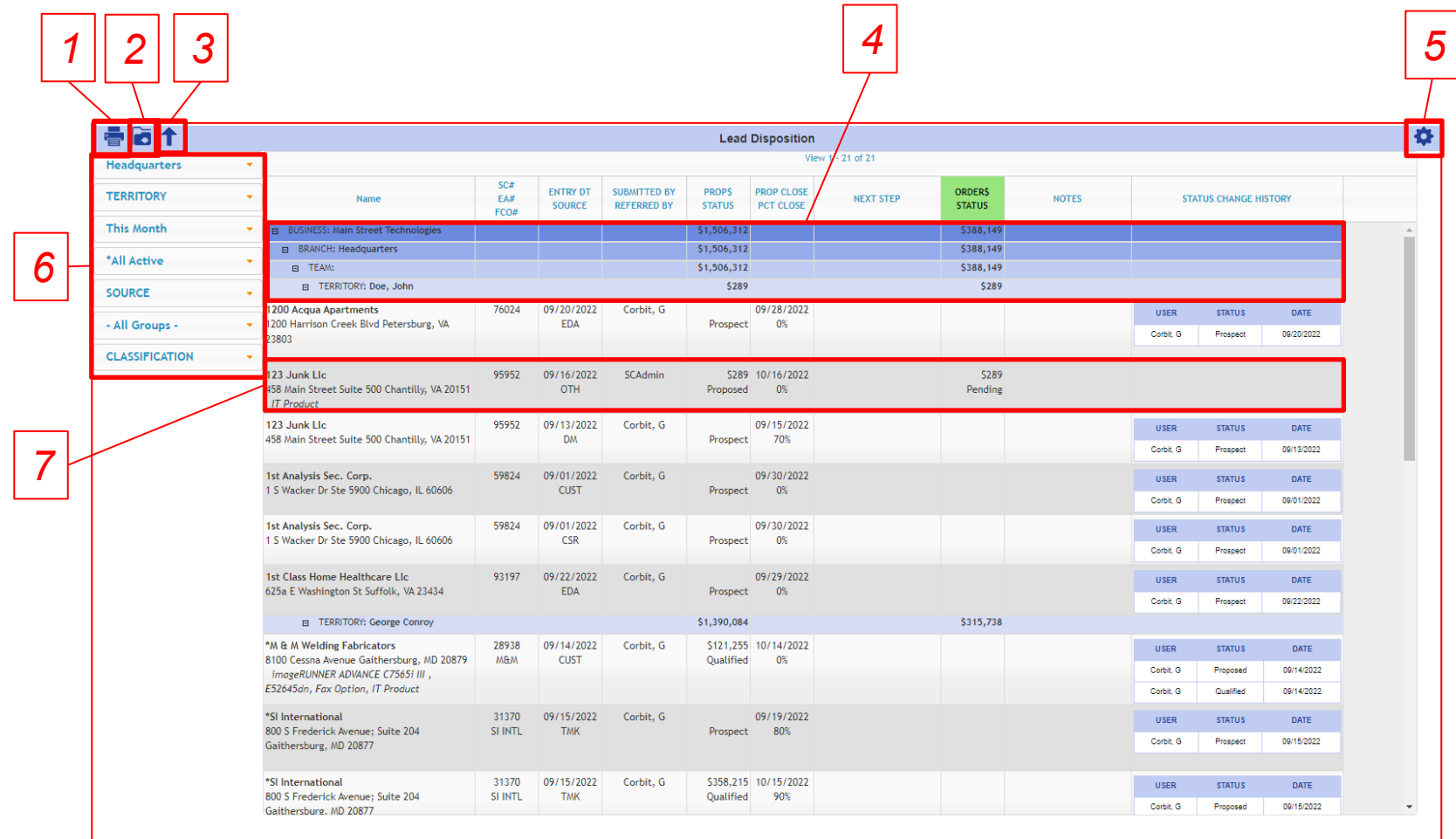
The screenshot shows the 'Forecast Bundled IT' interface. Callout 1 points to a print icon, 2 to a download icon, 3 to an email icon, 4 to a collapse icon, 5 to a select all checkbox, 6 to a summary row, 7 to a settings gear, 8 to a refresh button, 9 to a search dropdown, 10 to an individual lead row, and 11 to a lead row.

Name	EXP CLOSE SALES REP STATUS	IT SERVICES TERM	IT PRODS	IT SETUPS	HWS	SERVICES TERM
BUSINESS: Main Street Technologies						
BRANCH: Headquarters		\$9,615	\$60,133		\$349,763	\$2,127
TEAM:		\$9,615	\$60,133		\$349,763	\$2,127
SALES REP: Corbit, G		\$9,615	\$60,133		\$349,763	\$2,127
<input type="checkbox"/> Abs 1421 Prince St Ste 100 Alexandria, VA 22314	09/30/2022 Corbit, G Prospect	\$0	\$0			\$0
<input type="checkbox"/> Accts Payable Div,Kleber (Sso) Stuttgart 71032 Boeblingen Panzer Kaserne Bldg 2909 Apo Ae, AE 09046	09/24/2022 Corbit, G Proposed	\$1,923 36	\$12,645		\$22,615	\$354 36
<input type="checkbox"/> AdapthHealth 220 W Germantown Pike Ste 250 Plymouth Meeting, PA 19462	09/28/2022 Corbit, G Proposed	\$1,923 36	\$11,872		\$23,801	\$354 36
<input type="checkbox"/> Aladdin Shriners Hosp. ASSC 3850 Stelzer Rd Columbus, OH 43215	09/29/2022 Corbit, G Proposed	\$1,923 36	\$11,872		\$27,946	\$354 36
<input type="checkbox"/> American Red Cross/E Street 2025 E Street, NW Washington, DC 20006	09/21/2022 Corbit, G Qualified				\$223,331	\$358 36
<input type="checkbox"/> Anderson Commercial Grp. LLC 8575 W Forest Home Ave Greenfield, WI 53228	09/14/2022 Corbit, G Proposed	\$1,923 36	\$11,872		\$24,123	\$354 36
<input type="checkbox"/> Anderson Commercial Grp. LLC 8575 W Forest Home Ave Greenfield, WI 53228	09/30/2022 Corbit, G Prospect	\$0	\$0			\$0
<input type="checkbox"/> Zurich Holding Co Of America 600 Red Brook Blvd Ste 350 Owings Mills, MD 21117	09/16/2022 Corbit, G Proposed	\$1,923 36	\$11,872		\$27,946	\$354 36

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



The screenshot shows the Lead Disposition Desk interface. Callout 1 points to the print icon, 2 to the download icon, and 3 to the collapse icon. Callout 4 points to the 'ORDERS STATUS' column. Callout 5 points to the settings gear icon. Callout 6 points to the left-hand filter menu, and callout 7 points to the main table of leads.

Name	SC# EA# FCO#	ENTRY DT SOURCE	SUBMITTED BY REFERRED BY	PROPS STATUS	PROP CLOSE PCT CLOSE	NEXT STEP	ORDERS STATUS	NOTES	STATUS CHANGE HISTORY
BUSINESS: Main Street Technologies BRANCH: Headquarters TEAM: TERRITORY: Doe, John									
1200 Acqua Apartments 1200 Harrison Creek Blvd Petersburg, VA 23803	76024	09/20/2022 EDA	Corbit, G	Prospect	09/28/2022 0%		\$388,149		USER STATUS DATE Corbit, G Prospect 09/20/2022
123 Junk Llc 458 Main Street Suite 500 Chantilly, VA 20151 IT Product	95952	09/16/2022 OTH	SCAdmin	Proposed	10/16/2022 0%		\$289 Pending		
123 Junk Llc 458 Main Street Suite 500 Chantilly, VA 20151	95952	09/13/2022 DM	Corbit, G	Prospect	09/15/2022 70%				USER STATUS DATE Corbit, G Prospect 09/13/2022
1st Analysis Sec. Corp. 1 S Wacker Dr Ste 5900 Chicago, IL 60606	59824	09/01/2022 CUST	Corbit, G	Prospect	09/30/2022 0%				USER STATUS DATE Corbit, G Prospect 09/01/2022
1st Analysis Sec. Corp. 1 S Wacker Dr Ste 5900 Chicago, IL 60606	59824	09/01/2022 CSR	Corbit, G	Prospect	09/30/2022 0%				USER STATUS DATE Corbit, G Prospect 09/01/2022
1st Class Home Healthcare Llc 625a E Washington St Suffolk, VA 23434	93197	09/22/2022 EDA	Corbit, G	Prospect	09/29/2022 0%				USER STATUS DATE Corbit, G Prospect 09/22/2022
TERRITORY: George Conroy \$1,390,084 \$315,738									
*M & M Welding Fabricators 8100 Cessna Avenue Gaithersburg, MD 20879 ImageRUNNER ADVANCE C75651 III , E52645dn, Fax Option, IT Product	28938 M&M	09/14/2022 CUST	Corbit, G	Qualified	10/14/2022 0%				USER STATUS DATE Corbit, G Proposed 09/14/2022 Corbit, G Qualified 09/14/2022
*SI International 800 S Frederick Avenue; Suite 204 Gaithersburg, MD 20877	31370 SI INTL	09/15/2022 TMK	Corbit, G	Prospect	09/19/2022 80%				USER STATUS DATE Corbit, G Prospect 09/15/2022
*SI International 800 S Frederick Avenue; Suite 204 Gaithersburg, MD 20877	31370 SI INTL	09/15/2022 TMK	Corbit, G	Qualified	10/15/2022 90%				USER STATUS DATE Corbit, G Proposed 09/15/2022

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, <i>Prob Close</i> or <i>Confidence</i> – 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.

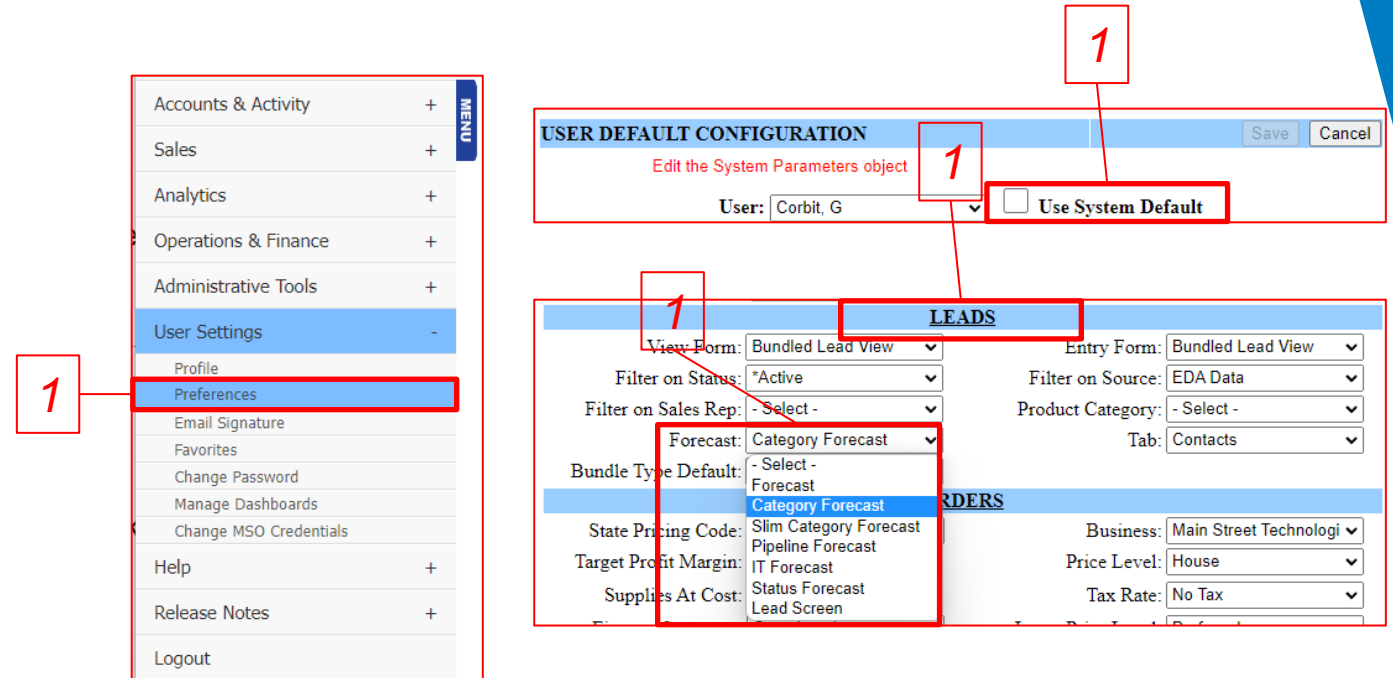
Icon	Associated Action
	Print the contents of this report.
	Download the contents of this report.
	Schedule this report to be emailed to myself and/or others.
	Collapse this report to show totals for reps rather than individual lead values
	Expand this report to show all leads for each sales rep

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*



The screenshot shows the 'User Default Configuration' dialog box. The 'User' field is set to 'Corbit, G'. The 'Use System Default' checkbox is unchecked. The 'LEADS' section is expanded, showing the 'Forecast' dropdown menu with options: 'Category Forecast', 'Forecast', 'Slim Category Forecast', 'Pipeline Forecast', 'IT Forecast', 'Status Forecast', and 'Lead Screen'. The 'Forecast' option is selected.

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.

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Headquarters

Corbit, Gary

*All Active

Basis: Expected Close

This Month

SALE TYPE

REVENUE RANGE

All Revenue

FILTERS

	NAME	Target	SALES REP STATUS CLASS SUB DATE	EXP CLOSE SOURCE EXP DEL CATEGORY	REVS GPS REP%	MGR-REVS MGR-GPS MGR%	HW-REVS HW-GPS	GYM-REVS GYM-GPS	SW-REVS SW-GPS	IT-REVS IT-GPS Mo Rev Term	MPS MP%
<input type="checkbox"/>	BUSINESS: Main Street Technologies				\$16,939,648 \$5,863,398	\$16,939,648 \$5,863,398	\$14,838,961 \$5,174,511			\$1,622,470 \$555,086 \$43,787 852	
<input type="checkbox"/>	BRANCH: Headquarters				\$16,939,648 \$5,863,398	\$16,939,648 \$5,863,398	\$14,838,961 \$5,174,511			\$1,622,470 \$555,086 \$43,787 852	
<input type="checkbox"/>	TEAM:				\$16,939,648 \$5,863,398	\$16,939,648 \$5,863,398	\$14,838,961 \$5,174,511			\$1,622,470 \$555,086 \$43,787 852	
<input type="checkbox"/>	SALES REP: Corbit, G				\$16,939,648 \$5,863,398	\$16,939,648 \$5,863,398	\$14,838,961 \$5,174,511			\$1,622,470 \$555,086 \$43,787 852	
<input type="checkbox"/>	*M & M Welding Fabricators 8100 Cessna Avenue Gaithersburg, MD 20879 <i>Prospect; , ExpClose(09/30/22)</i>		Corbit, G Qualified NNP 06/30/2022	09/30/2022 Other	0%	100%					
<input type="checkbox"/>	*M & M Welding Fabricators 8100 Cessna Avenue Gaithersburg, MD 20879 <i>Prospect; , ExpClose(09/30/22)</i>		Corbit, G Qualified NNP 06/30/2022	09/30/2022 Other	0%	100%					
<input type="checkbox"/>	*M & M Welding Fabricators 8100 Cessna Avenue Gaithersburg, MD 20879 <i>Prospect; , ExpClose(09/30/22)</i>		Corbit, G Qualified NNP 07/18/2022	09/30/2022 Other	0%	100%					
<input type="checkbox"/>	*Millennium Capital / First Trust National Mortgage 8521 Leesburg Pike Vienna, VA 22182 <i>Prospect; imageRUNNER ADVANCE C7565i III , imageRUNNER 1643i , ExpClose(09/30/22)</i>		Corbit, G Qualified NNP 02/18/2022	09/30/2022 Customer_Referra 03/31/2022 Capi	\$41,642 \$13,742 50%	\$41,642 \$13,742 100%	\$41,642 \$13,742				
<input type="checkbox"/>	*US Dept of State 45 East Main St. Washington, DC 20520 <i>Prospect; 1/imageRUNNER ADVANCE C7565i III ,</i>		Corbit, G Proposed NNP	09/01/2022 Other	\$118,041 \$37,710 0%	\$118,041 \$37,710 100%	\$27,619 \$8,647			\$69,231 \$24,231 \$1,923	

2

Quick Tip:

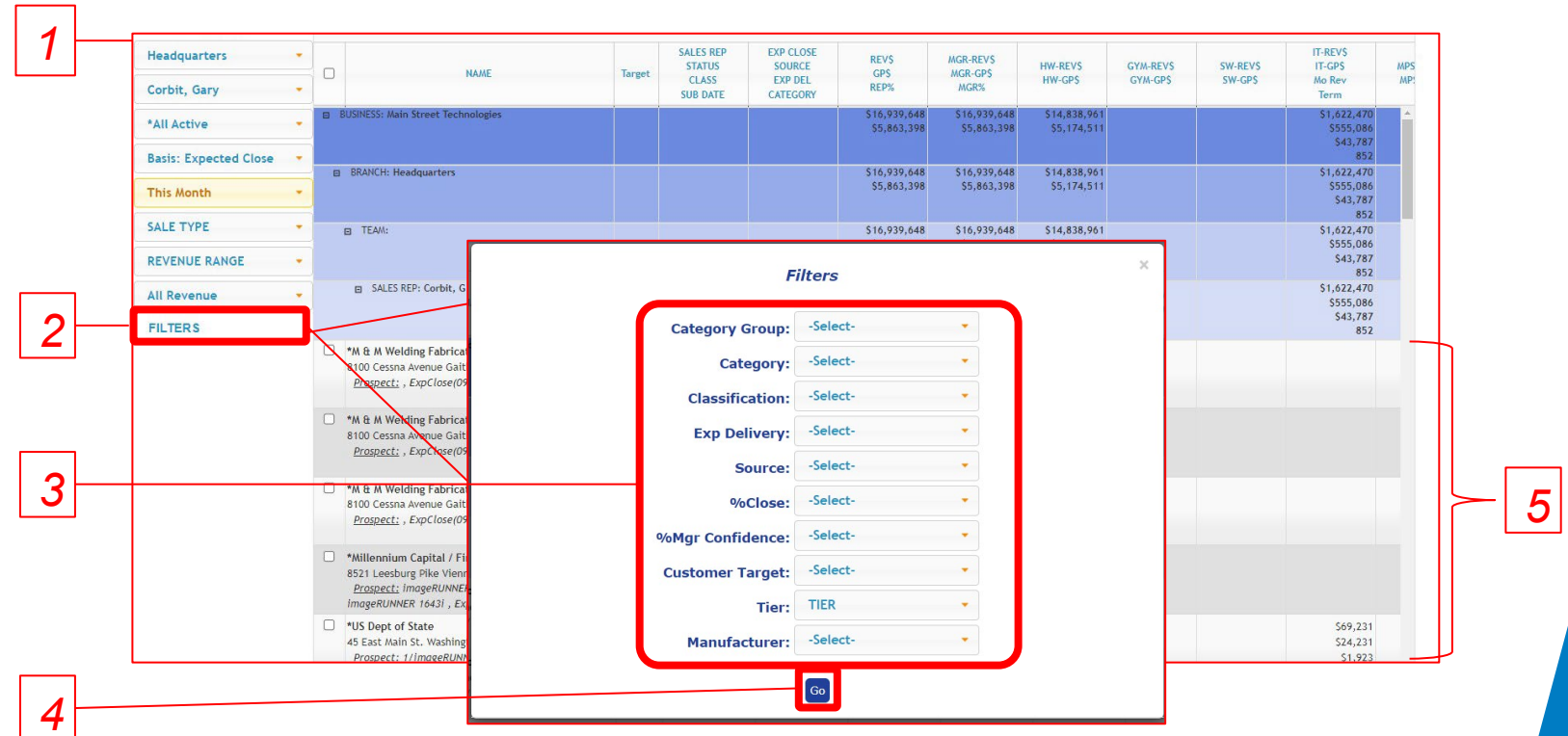
The drop downs shown may differ depending on system configuration or user permission level.

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.



The screenshot shows the SalesChain interface with a 'Filters' pop-up window. The main table displays lead information with columns for Name, Target, Sales Rep, Exp Close, Revs, Mgr-Revs, HW-Revs, Gym-Revs, SW-Revs, IT-Revs, and MPS. The 'Filters' pop-up contains the following fields:

- Category Group: -Select-
- Category: -Select-
- Classification: -Select-
- Exp Delivery: -Select-
- Source: -Select-
- %Close: -Select-
- %Mgr Confidence: -Select-
- Customer Target: -Select-
- Tier: TIER
- Manufacturer: -Select-

A 'Go' button is located at the bottom of the 'Filters' pop-up.

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.