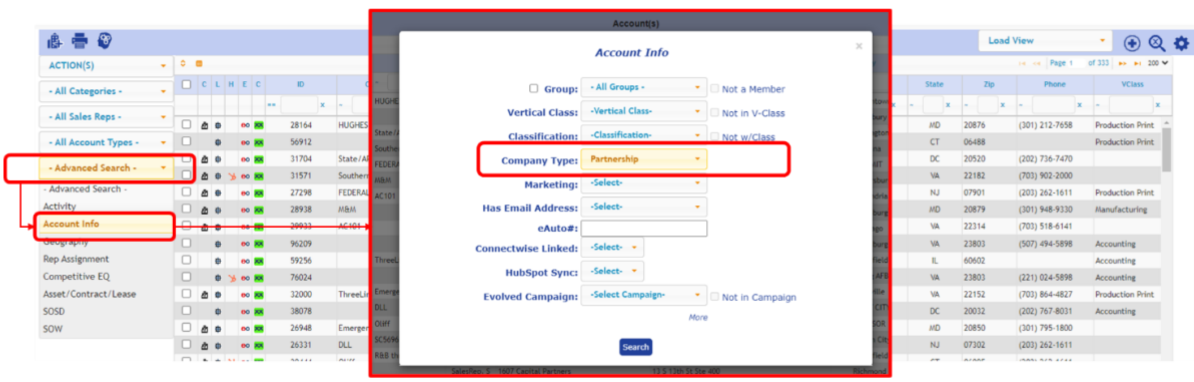
SalesChain v9.3 Release Notes

09-16-2024

Finance Company Integrations

- **Great America**
  - We expanded functionality to include application submit and decision notifications.
  - We added new functionality to view Invoices.
  - We expanded functionality to include buyout/upgrade quotes.
- **USBank**
  - We expanded functionality to include buyout/upgrade quotes.
  - We added new functionality to view Invoices.

Accounts List Advanced Search



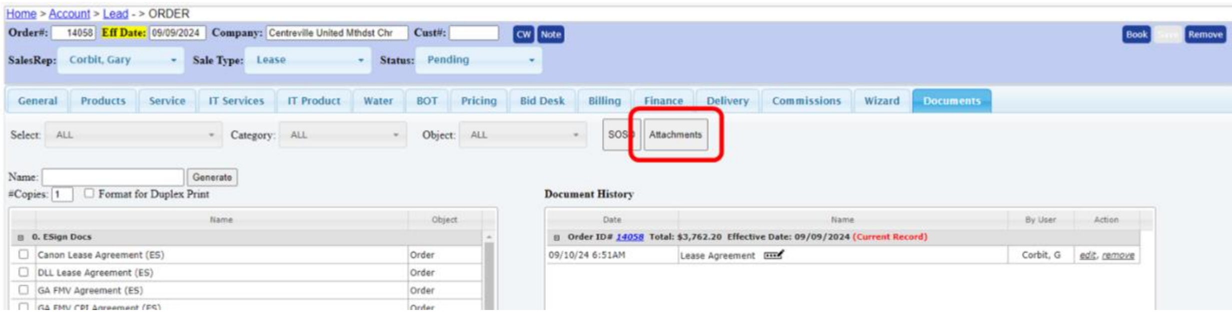
We added the Company Type filter to the advanced search utility. This will provide users with the added flexibility to search company records by company type. This feature can be accessed using the filter option Advanced Search > Account Info as seen above.

Activity Tracking – Product Specific

As more dealers are selling alternative products like IT Products, Managed Services, AV and Security (to name a few), tracking sales rep activity related to these differing products has come into question. How can managers track activity related to one product over another?

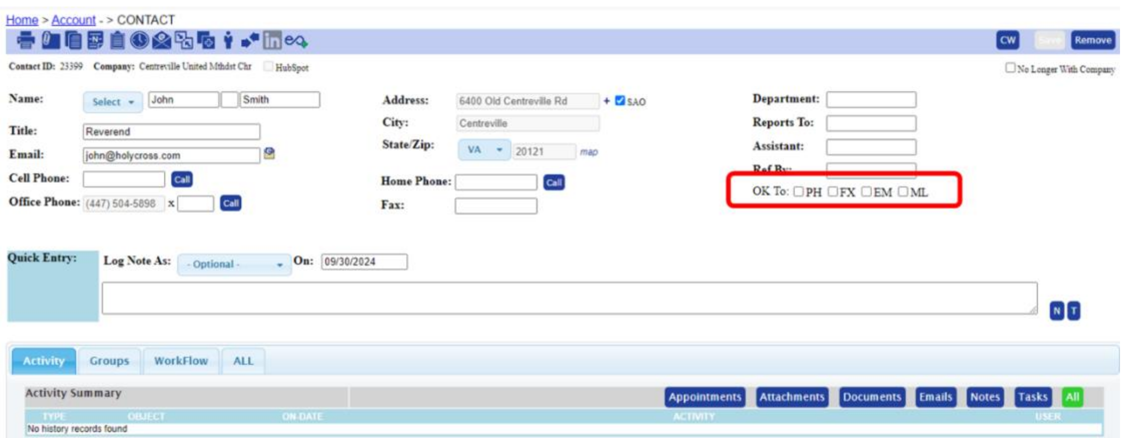
We've enhanced our sales activity tracking to allow you to more specifically define user action types by adding an associated Product Type indicator. This new feature allows managers to filter sales rep activity counts related to a respective product type like IT or AV/Security.

Attaching Documents to an Order



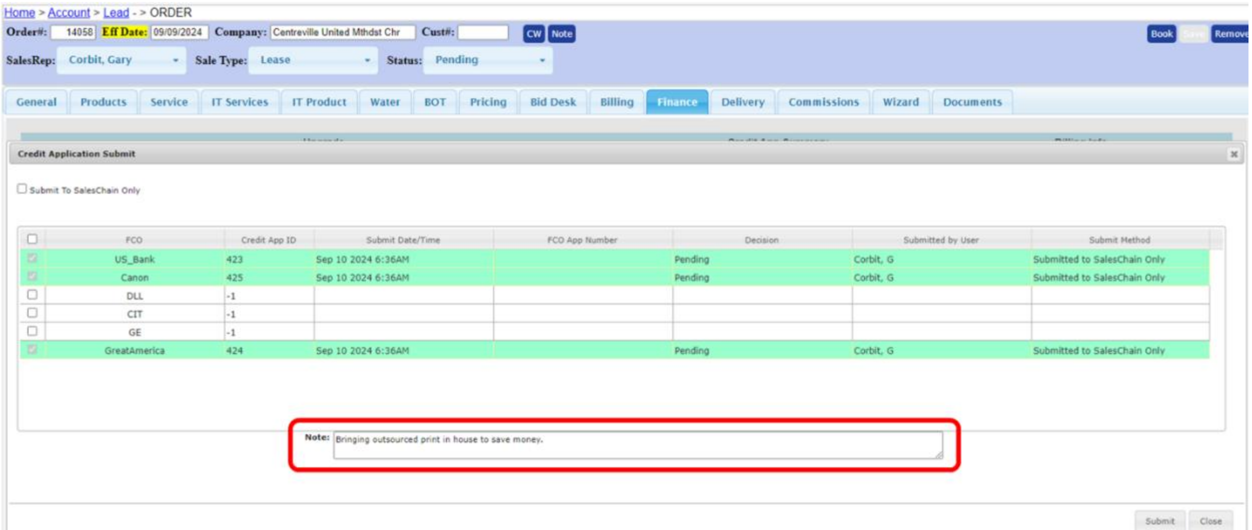
We added an “Attachment” button to the OBD Documents form to enable users to attach documents directly to the Proposal and/or Order on the documents tab.

Contact Profile



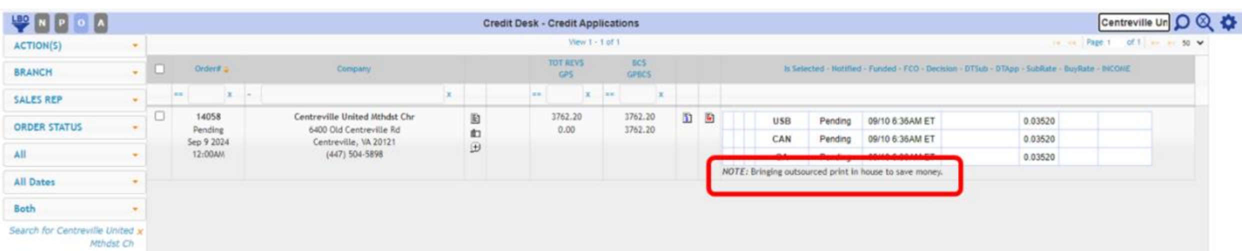
We added properties to the new Contact Profile form representing OK to Email, OK to Phone, OK to Mail, and OK to Fax. These properties had been part of the older forms and were originally left off the new form.

Credit Application – Note



To provide additional information, we added a dedicated note field to the credit application submit form.

This property will be prominently displayed on the credit desk summary and is available as a merge field for document templates and email templates.



Credit Desk – Application and Buyout Request Automation

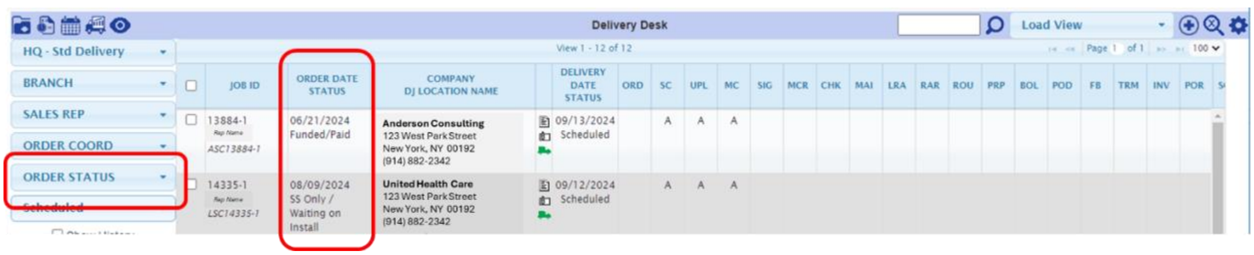
SalesChain has created a comprehensive workflow automation platform to manage Buyout and Credit Application and Decision processing. This enhancement allows your leasing department to organize requests, log communication with sales reps and organize transactional data more efficiently.

Customer Profile

We made a number of enhancements to this form to provide more information to users. The changes include:

- **EAutomate Tax Code** – We added the eAutomate tax code to the form to provide users with detailed
- **Proposal Name** – We added the proposal name to the Lead List grid to more clearly track leads for a given account.

Delivery Desk



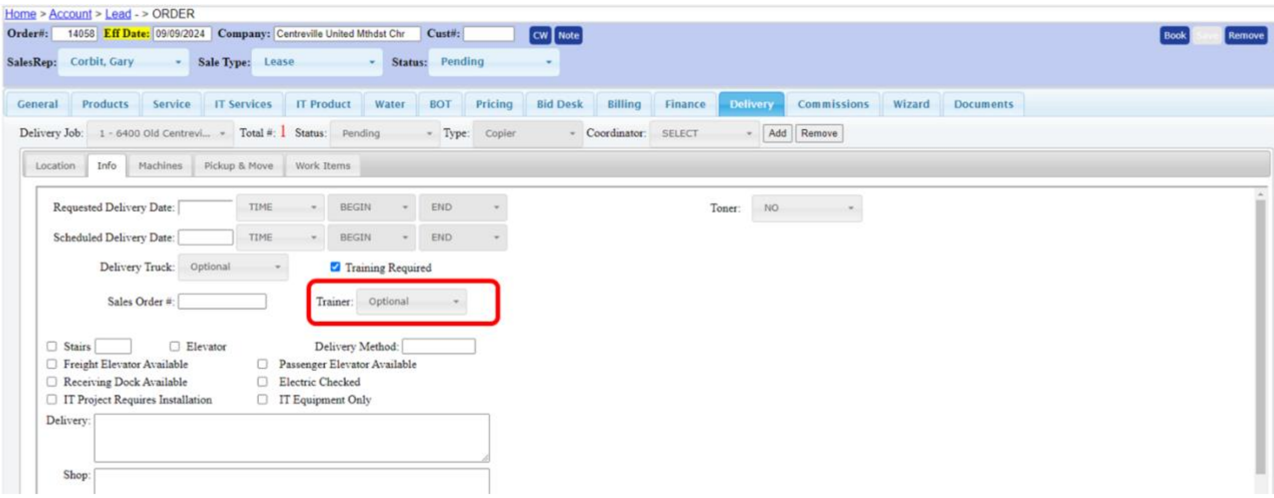
The Delivery Desk has been enhanced to provide the option for users to display the Order Date and Status within the grid. The Order Status filter was added to provided additional flexibility for users to display delivery job details for orders within a selected status.

Delivery Job Maintenance

We added the ability for users to Remove the first Delivery Job on an Order. This will allow users to remove improperly configured delivery jobs from an order. Previously, SC did not allow users to remove the first delivery job on an order for purposes of database integrity. As more dealers implement diverse delivery job workflow “Types” it has become necessary to provide this function.

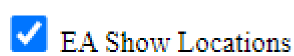
Delivery Job Trainer

We added a property to the Delivery Job to represent the assigned Trainer. This optional field is plainly displayed on the OBD Information pane and is available as a data merge field document template.



The list of users that will be displayed is a configured User Group that may be defined and configured as part of the SC System Configuration. Simply contact the SalesChain Support desk and they will help you activate this feature.

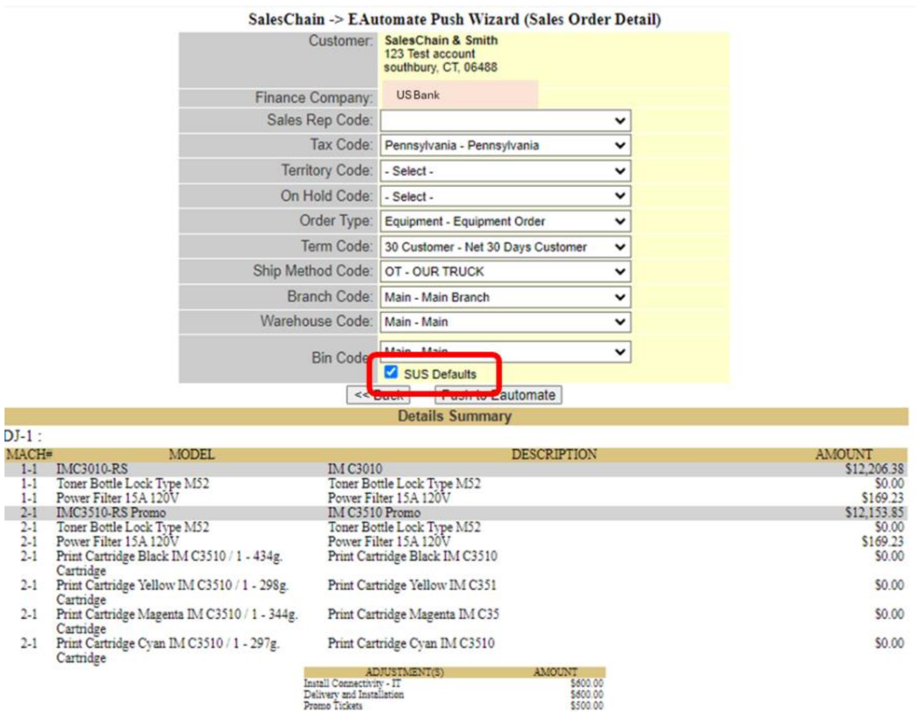
EAutomate Customer Locations



In a previous upgrade, we added the feature of pulling the customer location relationships into the SC database as part of the lineage process. A few of our clients have since asked that we have the option of turning this feature off. So, we added a “Switch” to deactivate this feature. The feature is on by default and can be deactivated simply by calling the support desk. They will modify the system parameter setting.

EAutomate – Dedicated Startup Supplies Bin

Many of our dealers have a defined warehouse bin for storing startup supplies for new equipment setup. To accommodate this when sales orders are created, we have added a Start Up Supplies ("SUS") bin on the Branch profile. We have also provided the option to use this bin when pushing sales orders to EAutomate. This option will appear when an order includes a machine with startup supplies configured.



SalesChain -> EAutomate Push Wizard (Sales Order Detail)

Customer:	SalesChain & Smith 123 Test account southbury, CT, 06488
Finance Company:	US Bank
Sales Rep Code:	
Tax Code:	Pennsylvania - Pennsylvania
Territory Code:	- Select -
On Hold Code:	- Select -
Order Type:	Equipment - Equipment Order
Term Code:	30 Customer - Net 30 Days Customer
Ship Method Code:	OT - OUR TRUCK
Branch Code:	Main - Main Branch
Warehouse Code:	Main - Main
Bin Code:	Main - Main SUS Defaults

<< Back | Push to Eautomate

Details Summary

DJ-1 :

MACH#	MODEL	DESCRIPTION	AMOUNT
1-1	IMC3010-RS	IM C3010	$12,206.38
1-1	Toner Bottle Lock Type M52	Toner Bottle Lock Type M52	$0.00
1-1	Power Filter 15A 120V	Power Filter 15A 120V	$169.23
2-1	IMC3510-RS Promo	IM C3510 Promo	$12,153.85
2-1	Toner Bottle Lock Type M52	Toner Bottle Lock Type M52	$0.00
2-1	Power Filter 15A 120V	Power Filter 15A 120V	$169.23
2-1	Print Cartridge Black IM C3510 / 1 - 434g. Cartridge	Print Cartridge Black IM C3510	$0.00
2-1	Print Cartridge Yellow IM C3510 / 1 - 298g. Cartridge	Print Cartridge Yellow IM C351	$0.00
2-1	Print Cartridge Magenta IM C3510 / 1 - 344g. Cartridge	Print Cartridge Magenta IM C35	$0.00
2-1	Print Cartridge Cyan IM C3510 / 1 - 297g. Cartridge	Print Cartridge Cyan IM C3510	$0.00

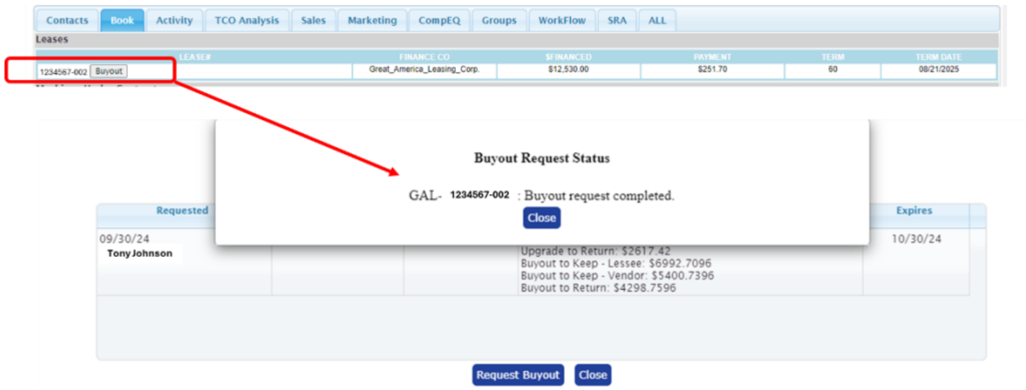
ADJUSTMENT(S)	AMOUNT
Install Connectivity - IT	$600.00
Delivery and Installation	$600.00
Promo Tickets	$500.00

Note: Startup supplies may be associated with host machines using the catalog association maintenance form. Please contact the SalesChain Support team if you need any help finding this feature.

Finance Company Buyout Integration Requests & Messaging

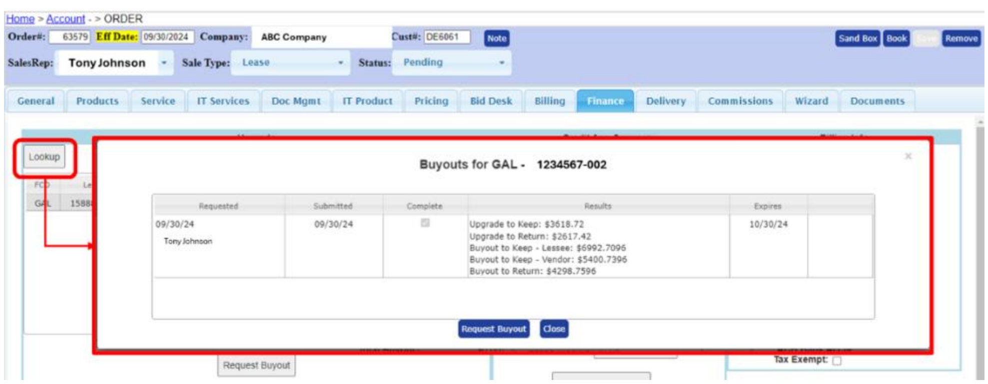
Leasing is fundamental for the Office Technology selling process. To further enhance your sales rep and leasing coordination processes, we have added the ability to request and receive buyout/upgrade figures right from within the Customer Profile and Proposal and Order pricing forms.

On the Customer Profile Page, simply click on the "Buyout" button next to the desired lease contract.

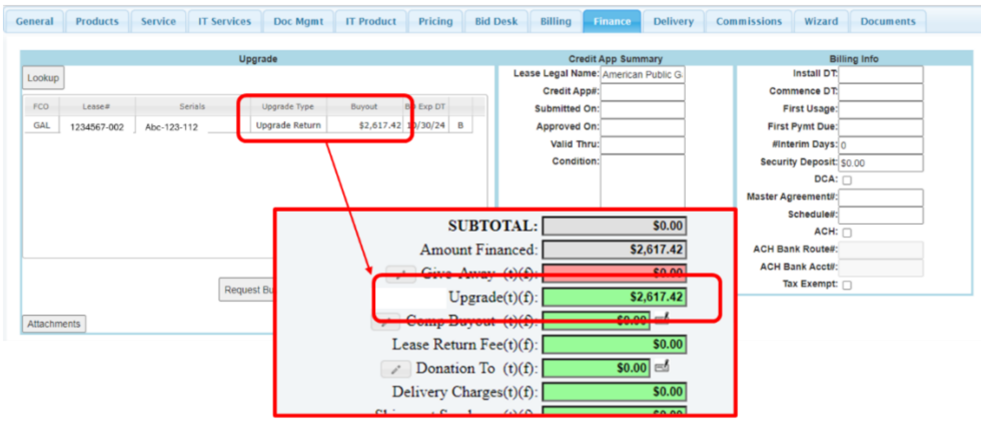


This feature will initiate a REAL TIME request for buyout/upgrade based upon the functionalities and participation of the finance company's API capabilities. Not all finance companies have this feature. USBank and Great America are the first to automate this feature. Others like Canon Financial Services, DLL, and Wells Fargo are in the works. If a finance company does not have a real time API, an email will be submitted to the appropriate party (at FCO or your Lease Coordinator).

Sales Reps can use the buyout/upgrade numbers within the Proposal and Order pricing tools by simply clicking a button:



Simply pick the desired "Buyout or Upgrade Type" to have the appropriate value placed onto your proposal. The value will automatically be placed within the correct area on the Pricing tab:

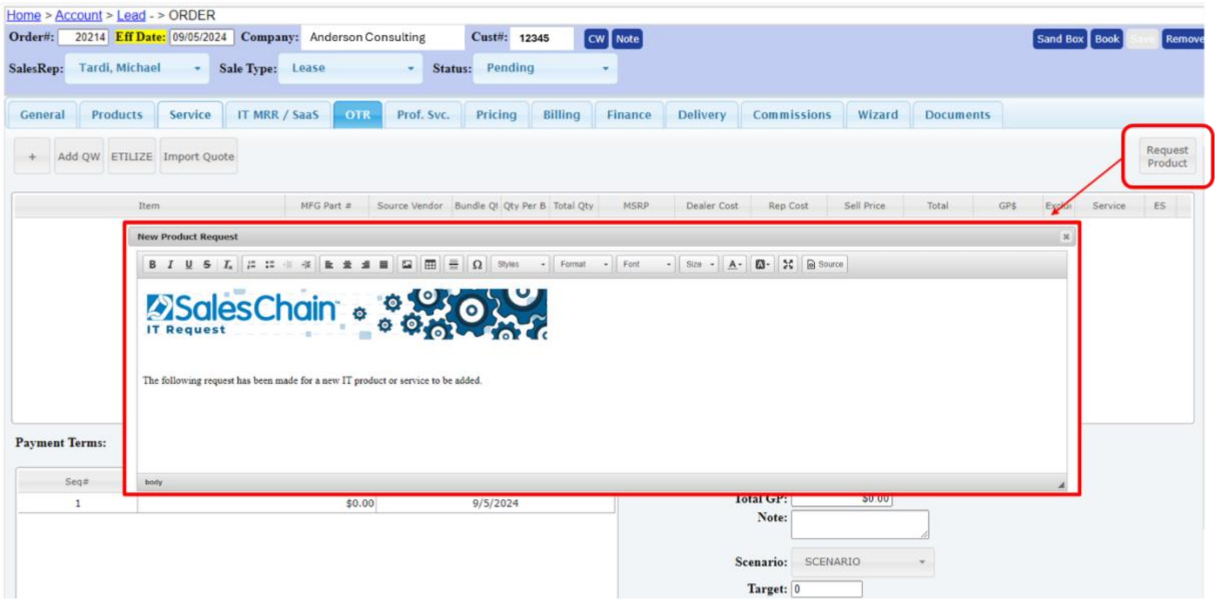


We have also made enhancements to proactively communicate with the sales reps using the new SalesChain Messaging system to send and log communications to users when results are available. Users will receive an email notification and be able to view results online within the relative Customer or Proposal or Order or Credit Desk view.

Get ready to see emails that look like this within your email box!

IT Products & Managed Services Catalog Update Email Request

Many of the dealers limit the editing of IT and MS catalogs to a small group of users to avoid duplicity and improve quality. We added an email function to the IT Products and Managed Services product lookup forms. It allows users to press a button and have a preformatted email template configured and sent to the designated responsible party, to add products to the respective catalog.



FYI: The responsible party is defined on the branch profile maintenance form.

IT Request Email: ITSupport@myCompany.com

IT Products Etilize Product Search

Providing a fast and easy method of searching the 18+ million products within the IT Products catalog is critically important for our users. In order to provide a more efficient method to navigate the Etilize Catalog, we:

- Modified the search algorithms and restructured the products database to speed up the search.
- Many users told us that the images were not important. We made the display of the product images optional, again, to speed things up.
- Improved navigation to avoid unnecessary reloads.
- Fixed a display issue that was causing the accessory tab grid to shrink when resizing the window.

Lead Disposition

We added the Named Views feature to this form, allowing users to create and save formatted views for private or public use.

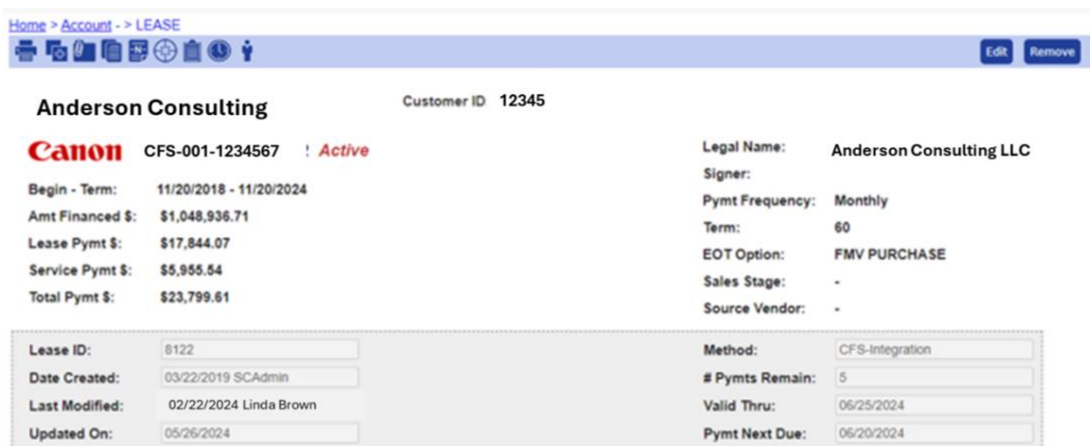
Lead Source

We added logic to the system to provide a default setting for the Lead Source property. A property labeled “Source Default” was added to the User Default profile. The Lead Bundle, Category, and Profile Targeting forms were modified to effectively set the source to the default value when creating a new lead.

Lease Desk

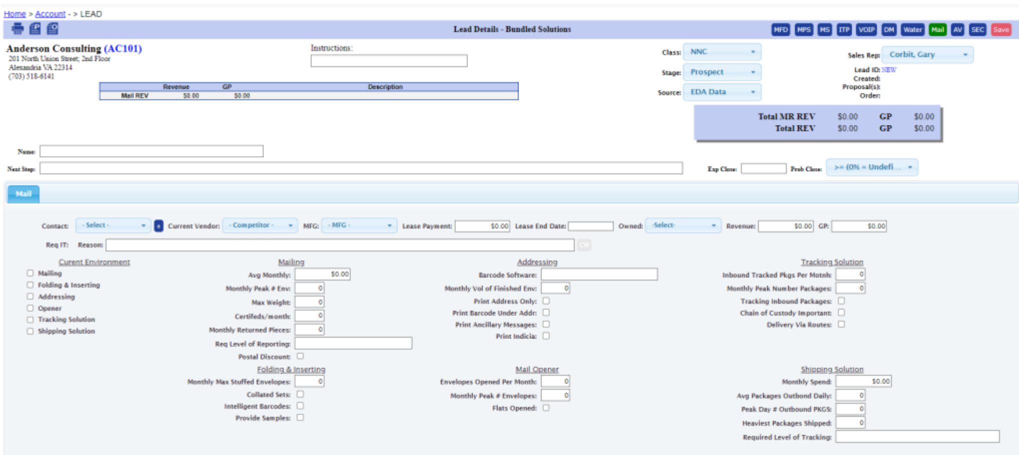
We improved the filtering on this interactive report to include “Is Open” status. This feature makes the report function more like the Order Desk.

Lease View



We relaced the Lease View form with a new, modern-looking version to better represent the data.

Mailing Solutions – Opportunity Profiling



We have added a specific opportunity forecasting feature for Mailing Solution sales.

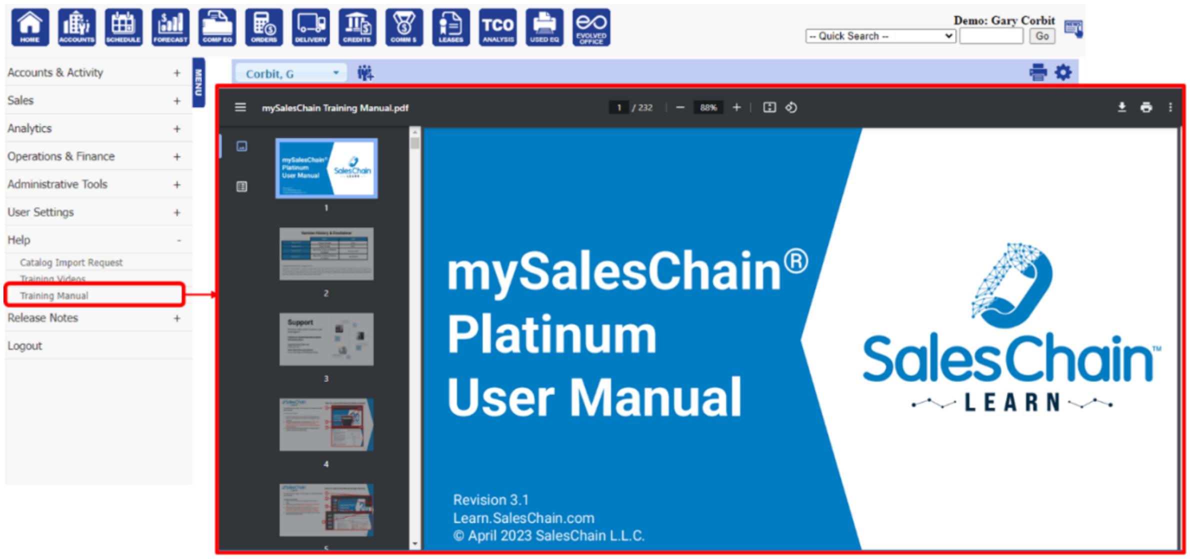
Sales Commissions – Year to Date Achievement

We modified the sales commission reconciliation utility to allow monthly sales commission achievement basis to be the accumulated year to date achievement.

Used Equipment

We enhanced the administration tools for used equipment to allow admin users to search for “for service only” product catalog items when associating and setting service pricing for older machines. Within SC, dealers may publish service rate pricing for products not active to sell as new.

User Training Manual



The support team has made it easier for users to access our training manual by placing a reference to the manual within the menu. Simply traverse to Menu/Help/Training Manual to view the full SalesChain Learn user manual.

FIXES & TWEAKS

- **IT Services Catalog –** Added logic to prevent users from creating duplicate service items.
- **Re-Leased Equipment –** Added logic to ensure the inclusion of the MSRP value within the CPQ computations.
- **Delivery Job Location Contacts –** Fixed an issue where contacts were not saving when special characters were present.
- **Lease Desk –** Added navigation link to redirect user to Customer Profile page when clicking on the company name.
- **Service Rates Edit Maintenance –** Added the Catalog Item Identifier to the grid to provide a clearer visual reference to the product catalog SKU's.
- **Order Desk –** Modified the header section to avoid unnecessary "wrapping" to a second line when screen width is reduced.
- Fixed an issue where the commissions profile of a proposal was not accurately copied into the order when the proposal is converted into an order.

- Enhanced the Contact Desk form to include a “Roles” filter to allow users to view contacts that play a selected role.
- Repaired the Last 60 Days filter on the Order Desk form.
- Refined the Group filtering on the Customer and Contact list form to show groups associated with the relative record type (customer and contact).
- Added the Zero Point Commission rate factor to the lease pricing table and modified the computation for points, including NASPO protections.