iHASCO Feedback

Feedback following demos and workshops

Contents

Overview

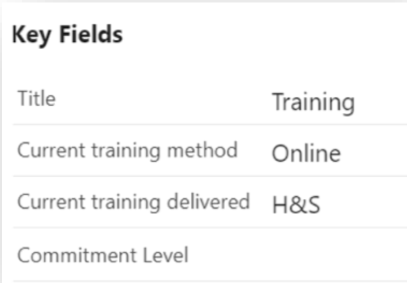
The client has been offered workshops and demos to showcase new functionality and review how processes will change for them moving forward.

Feedback from New Business Team

Prospects:

Move some mandatory fields to a latter stage.

The fields below are at Trial stage, to be moved to Chasing.



They wish to make all necessary/mandatory fields for conversion clearer to identify.

Opportunities:

Approvals for Special Payments should ideally sit with Line Manager and Head of Dept. they will have discussions with Millie in Finance to get verbal approval.

The current design will send <u>all</u> Special Payment arrangements to <u>all</u> Line Managers, Head of Dept as well as Finance.

This has been addressed in the associated tickets and Dom is to make time with me to discuss.

Payment Method and Payment Terms are not known until the client is ready to place an order. To prevent any Quotes being raised without payment details then these two fields are to default to the following.

- Payment Method: Invoice
- Payment Terms: 30 Days

Quotes:

Need to make necessary/mandatory fields clearer to identify, 'Quote Type' being an example.

When a new Quote record is created and saved, they would prefer that the page for the new Quote record is loaded, instead of the system returning to the Opportunity

CPQ Quotes:

Need to be able to discount by GBP as well as %

Contracts:

Need to remove signatures for the 99% of customers not needing to sign.

NOTE: This has been addressed and 3 Contract templates now exist.

- Signed via Adobe Sign.
- Written Signature.
- No Signature.

Events:

Better reminders to remind staff of an event happening, say within 1 hour for example?

Feedback from Account Managers Team

Quotes:

The template was not customer friendly.

NOTE: This has been rectified and the new template is approved and in UAT.

Contracts:

Automation Request:

When the Contract record is set to ‘Activated’ then the following should happen.

- Payload sent to LMS.
- Email sent to Finance team with Order/Contract details.
- Opportunity changes to ‘Closed Won’.

Feedback from Finance Team

Prospects

Email, Address and Phone(or)Mobile must be mandatory fields.

Currently you can convert a Prospect without any of this data being present.

Accounts

VAT No and Company Registration Number are nice to have.

Contacts

Billing Contact checkbox cannot be edited, this is an essential field for Finance to distinguish who to invoice.
NOTE: This checkbox is driven by the following formula.

If(
Account.c2g__CODAFinanceContact__r.Id = Id,
true,false)

It is unlikely that this formula can be converted for use by the client, so they have requested a field to help identify the Billing Contact within any company they have dealings with.

Recent LMS tests identified that payloads fail if the Contact has no email address. Validation would be necessary to prevent this from happening.

Opportunities

NEW FIELD. Notes to Finance (Long Text)

Payment Method and Payment Terms for Direct Debits.

New Customers are signed up to a DD of 30% up front and then 10 instalments for their first year. Any subsequent with this customer Orders/Contracts which remain on DD will default to 12 instalments unless it is decided that 30% is needed upfront.

Quotes

Payment Method should be read only and pull the same value from the field of the same name on the Opportunity object.

Contract templates

Contract Term does not appear on the form, it just says ‘X Years’.
This needs to say 1 Year, 2 Years, 3 Years etc.

Email Templates (internal)

The following fields are essential.

- Contract Term.
- First Order.
- Payment Method = DD or Card Payment.
- Notes to Finance (see 'Opportunities').
- LMS ID (for existing customers only)

Concerns

Emails for new Contracts are not arriving to the HelpScout Mailbox.

Feedback from Software Development Team

Contract Amendment

Showstopper

New Contract record is not generated when *Contracted* tick box = TRUE

Pilot Orders

Showstopper

Validation rule prevents the child Opp from being raised.
Payment Method must be completed (which is incorrect) but this field is not shown on the 'new Opp' page layout.

New Business

Showstopper

Users must choose *License Type* at Quote level, but when building a quote can choose a completely different pricing model.
LMS rejects these payloads, and this is going to happen a lot, hence marked as a showstopper for this process.

Client feedback: IF *License Type* is selected THEN only show those matching products + add-ons when building a Quote in CPQ.

Other LMS failures

- Email blank.
- Contact first name blank.
- Primary contact blank.
- Order payloads send both Parent and Child Product IDs. LMS rejects them as not matching, needs matching Child IDs only.

Non-LMS Feedback

- *ACV* for 1-year contracts does not work. It appears tailored only for 3-year contracts, so a 1-year ACV will be divided by 3 every time.
- *Multiple Product Total Contract Value:* Does not calculate costs for new products added, only those that may be removed.
- *Primary Contact* not pulled from Opp to Quote.
- *License Model* not pulled from Opp to Quote.
- *Payment Method* not pulled from Opp to Quote.