Whalen Integrated Sales Center Software

User Guide

Table of Contents

INTRODUCTION

This document is a basic guide on using the Whalen Integrated Sales Center Software. It contains information on the architecture of the application as well as the major functions of the eRep software including the following topics:

- Requesting a user account
- Logging on to the site
- User Administration
- Dashboards
- CRM functions

INTEGRATED SALES CENTER

The Integrated Sales Center software (known from here on as eRep) has been created primarily for hardware manufacturers and allows their sales representatives to select, price, quote, create submittals and forecast sales of hardware systems.

It enables manufacturers to perform the following:

- Track opportunities
- Perform product engineering selections
- Quickly create pricing and configuration specifications from simple to complex products
- Create quotes, orders and support custom multipliers
- Support integrated customer support
- Generate sales intelligence
- Create reliable and accurate forecasting models
- Integrate with existing ERP or CRM systems

All of this adds up to a system that allows manufacturers to dramatically increase sales while simultaneously making it easier and faster for customers to purchase their products.

The eRep software consists of several modules that may be included to provide support for a number of software applications. Examples of eRep modules include:

- User Administration
- Quoting and Ordering
- Selection
- Pricing
- CRM
- Help Desk

MODULAR DESIGN

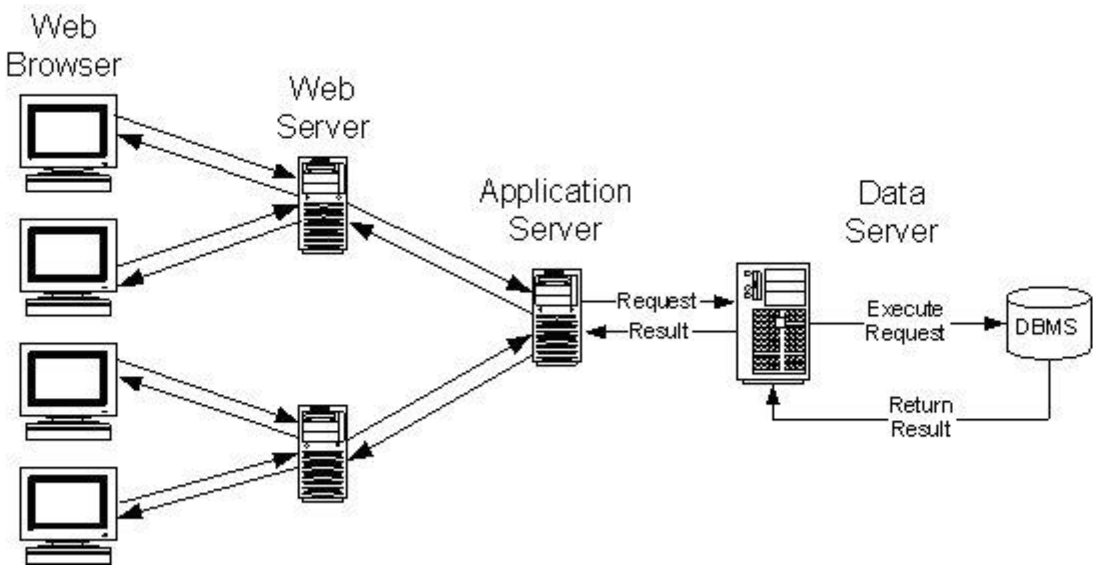
The eRep application is designed as a modular application, meaning that the different components are modular in nature. Being modular in nature means that the application may be customized for the individual manufacturer and provide only the components necessary. For example, some customers may choose not to purchase the Quoting and Ordering module. Others may choose Quoting and order and the Parts store modules, but leave out the Selection module.

Being modular allows the manufacturer to tailor the application for their specific needs while saving money but purchasing only the modules necessary. Additional modules may be added at any time. This user manual covers all of the modules currently available. Depending upon the manufacturer's requirements, all of the features shown here may not be available in each user's implementation.

TIERED DEPLOYMENT

The eRep application is designed as a multi-tiered application architecture. While most web applications lend themselves to being multi-tiered by nature, a single instance of the eRep application may be deployed on one, two, three or more servers.
Each tier may be deployed on a single standalone server or on the same server. Currently, in most cases, the application is deployed only on one server.

The figure below shows an example of an application deployed across multiple servers.



The advantage of deploying the application across multiple servers is that a customer may have specific requirements due to load or security reasons and may wish to keep each layer of the application separate.

For security purposes, a customer may demand that the presentation or web layer run on a public-facing server that connects to their network via a firewall where the business logic and database servers reside. The eRep application supports deployment in this configuration.

For load balancing purposes, it may be necessary to setup multiple presentation servers that connect to multiple application and database servers or any combination of these.

ACCOUNT MANAGEMENT

Account management refers to topics associated with managing or creating a user account. It also includes the topic of recovering account passwords. Please view any of the topics listed below for more information related to managing user accounts.

- Creating a secure password
- Requesting a User Account
- Forgot your password
- My Profile
- Logging in

CREATING A SECURE PASSWORD

Creating and using a strong and secure password helps to keep your personal information safe, protect your account and the content you have created and prevent someone else from misusing your account. A strong password is nearly impossible for someone else to guess. Follow these tips from Google to learn what makes a good password and apply them to your own.

VALID CHARACTERS AND PASSWORD LIMITATIONS

For the eRep system, passwords must be between 8 and 20 characters in length and may contain only alphanumeric characters. Passwords may not contain spaces. At least 1 character must be a number and at least 1 character must be a letter.

USE LETTERS, NUMBERS & SYMBOLS

Combine different types of characters and use a mix of alphanumeric characters (letters and numbers) and symbols:

- Use uppercase (capital) letters. Examples: A, E, R
- Use lowercase (small) letters. Examples: a, e, r
- Numbers. Examples: 2, 6, 7
- Symbols and special characters. Example: ! @ & *

RECOMMENDATIONS & EXAMPLES

Replace letters with numbers & symbols: Choose a word or phrase and use numbers and symbols instead of some letters. Example:

- "Spooky Halloween" becomes "sPo0kyH@110w3En"
- "Later gator" becomes "L8rg@+0r"

Abbreviate a sentence: Come up with a sentence and use the first letter of each word. Example:

- "Uncle Peter always ate chocolate-covered everything" becomes "uP@8cCe!"

Use long password: Long passwords are stronger. You can use memorable phrases or words from your favorite songs, poetry, or quotes. Example:

- "an_0pen_<3_=_an_Open_MIND"
- "It's_a_long_way_2_the_^_if_U_wanna_Rock&Roll"
- "From_time_to_time,_The_clouds_give_rest_To_the_moon-beholders"

AVOID PERSONAL INFORMATION & COMMON WORDS

Don't use personal information

Avoid using information that others might know about you or could easily find out. Examples:

- Your pet's name
- Your nickname
- Your street name

Don't use common words

Avoid simple words, phrases, and patterns that are easy to guess. Examples:

- Obvious words and phrases like "password" or "letmein"
- Sequences like "abcd" or "1234"
- Keyboard patterns like "qwerty" or "qazwsx"
- Any examples in this article, like "sPo0kH@ll0w3En" or "uP@8cCe!"

DON'T REUSE PASSWORDS

Use a different password for each of your important accounts, like your e-mail and on-line banking account.

Reusing passwords is risky. If someone figures out your password for one account, that person could sign in to your other accounts and access your e-mail, address, and even your money.

BE PEPARED IF YOU FORGOT YOUR PASSWORD

To make sure you can get back into your eRep account if you ever can't sign in, keep your profile information up to date. This means ensuring that your e-mail address is current and that you have access to it. For more information regarding your user profile, view the help topic entitled "My Profile" located elsewhere in the user manual.

This will help you reset your password if:

- You forget your password
- You think someone else is using your account
- You can't sign in for another reason

REQUESTING A USER ACCOUNT

If a visitor to the site does not currently have an account in the system, the visitor may sent a request to the system administrator requesting that an account be created. All accounts must be approved by the system administrator prior to logging in to the system.

To request a user account, the visitor must provide the following information:

- Company Name
- First Name
- Last Name
- E-mail Address
- Address
- City
- State
- Postal/Zip Code
- Country

Requesting a user account is simple and quick. To request an account, the visitor must click the "Request User Account" link at the bottom of the User Login panel as shown in the figure below.

Figure 1 - Login dialog

Clicking the link will redirect the visitor to the Request User Account page.

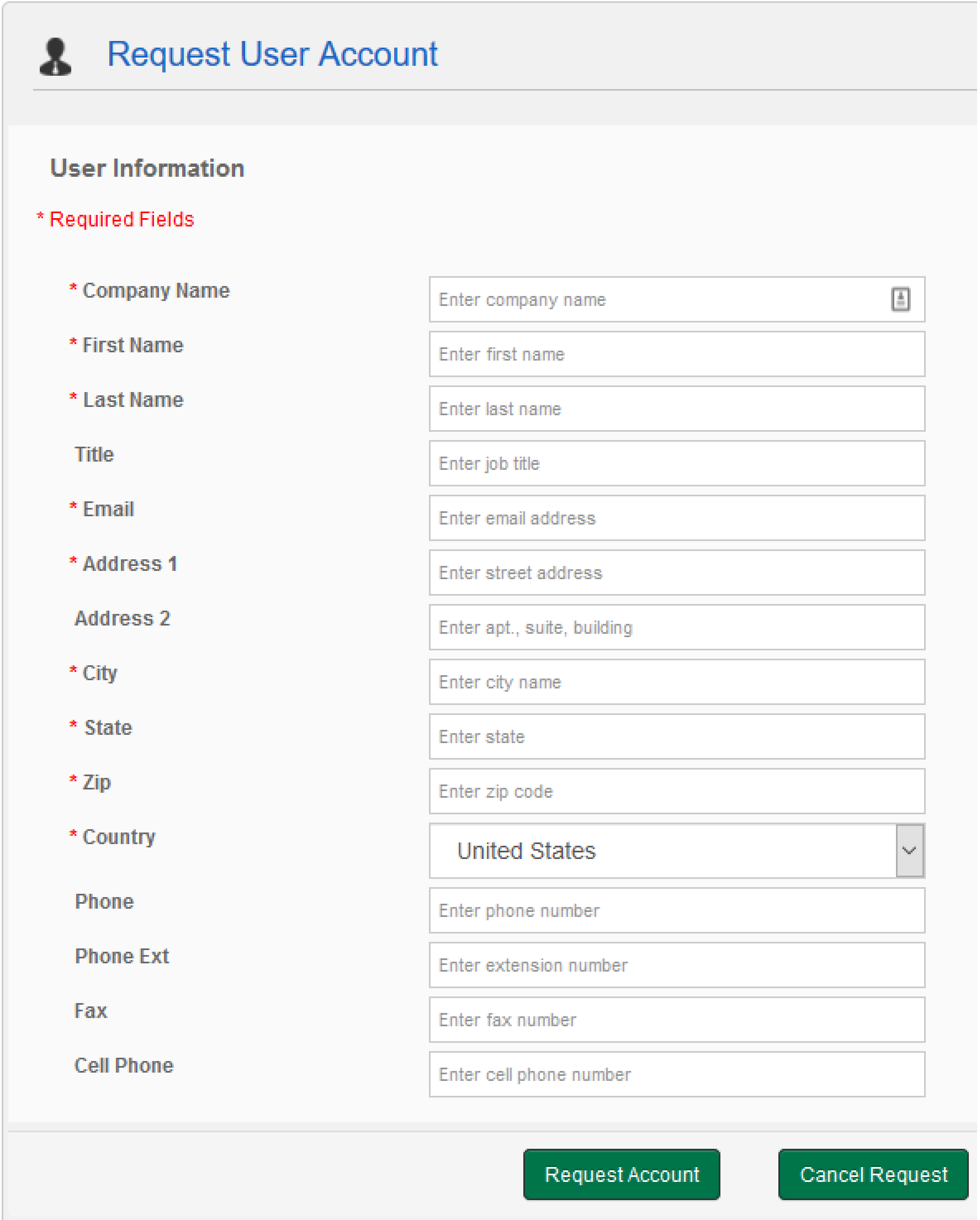


Figure 2 - Requesting a user account

The visitor must fill in the required fields as mentioned above. Once the account information has been entered, the visitor clicks the Request Account button. If the visitor clicks the Cancel Request button the confirmation pop up message shown below will be displayed.

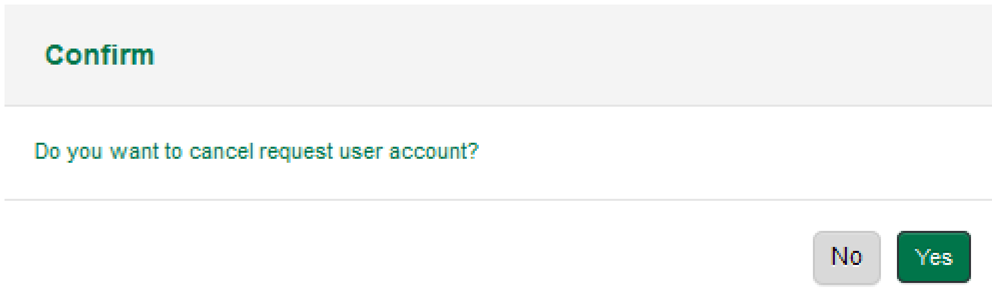


Figure 3 - Canceling the new user account request

If the visitor clicks the Yes button, they will be redirected back to the login page. If the visitor clicks the No button, the confirmation pop up will close and the visitor will be returned to the underlying page.

Upon submittal of the account request, the system will prompt the visitor to confirm the user account request as shown below.

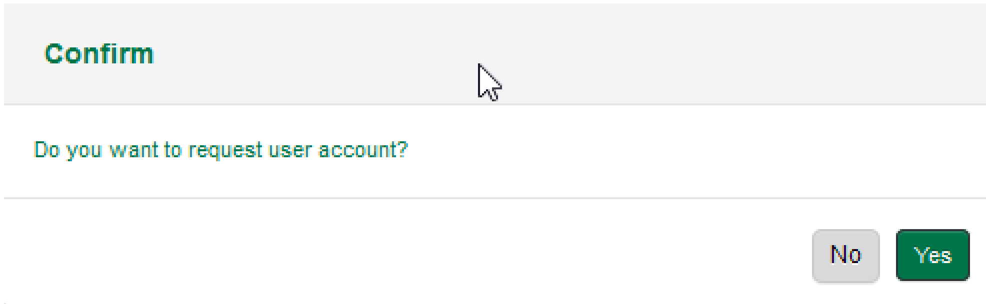
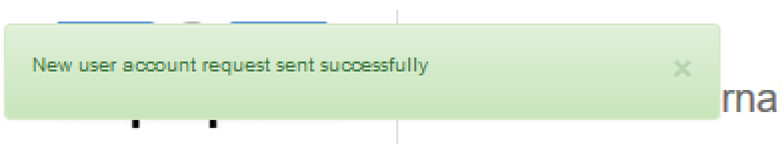


Figure 4 - Confirming the creation of an account

In order to continue, the visitor must click the Yes button. If the visitor clicks the No button, the pop up message will close and the visitor will be returned to the underlying page. If the visitor clicks the Yes button the system will forward the visitor's request for a new account to the system administrator and display the following message.



The requester will also receive an e-mail informing them that their account request has been received and will be reviewed by the system administrator. See the figure below for an example of the message.

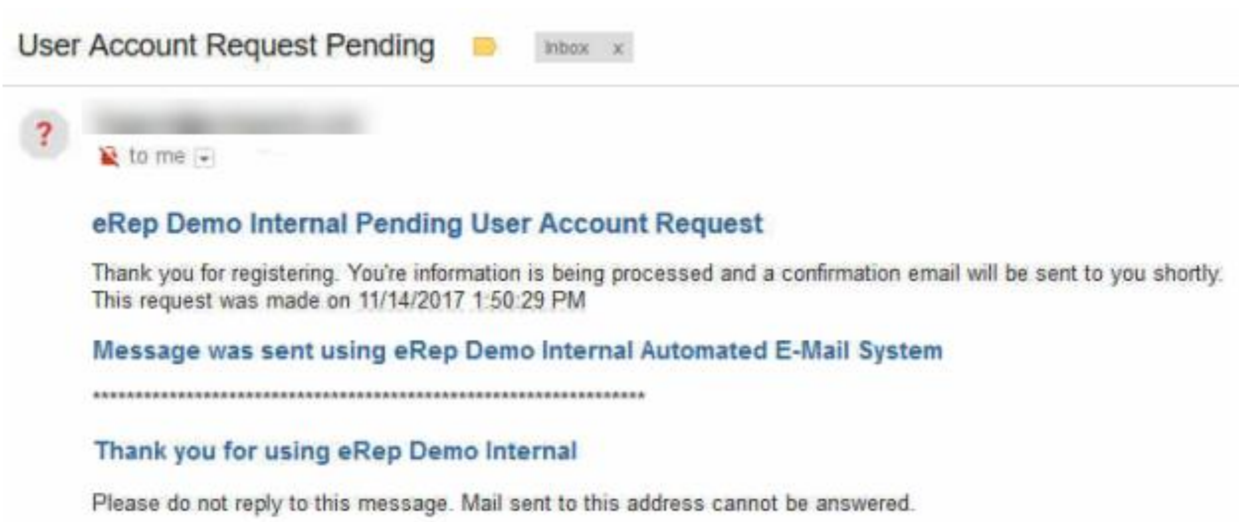


Figure 5 - Example E-mail requesting user account

After the system administrator reviews the visitor's request for a new account and approves the request, the visitor will receive a confirmation e-mail message and will be able to login to the system. An example of the approval message is shown below.

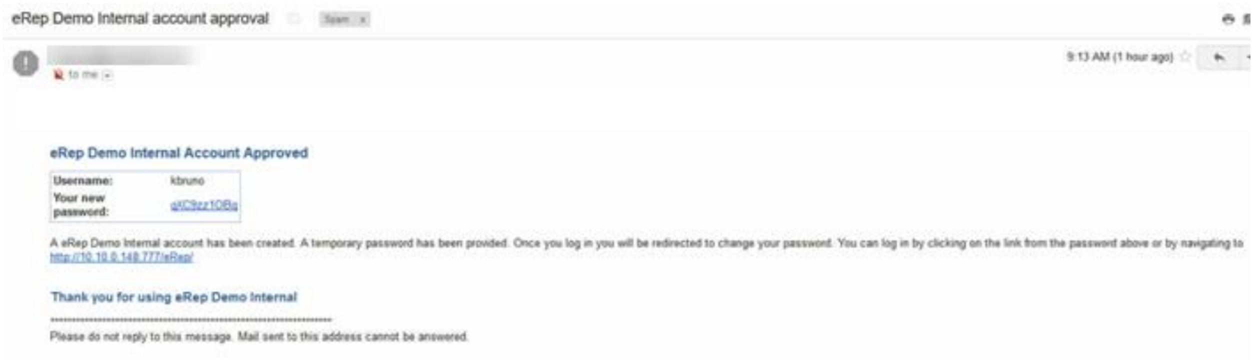


Figure 6 - Account approved e-mail message

If the visitor entered an e-mail address that already exists in the system, the Request User Account form will display an error message informing the visitor that the email already exists. See below.

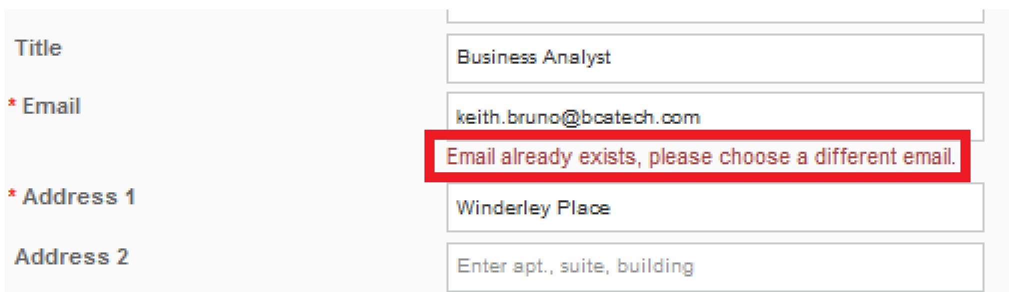


Figure 7 - Account already exists

In this instance, the user should use a different e-mail address, or attempt to recover their password using the techniques described in the article "[Forgot your password]" located elsewhere in the user manual.

FORGOT YOUR PASSWORD

In the event that a user forgets or loses their password, the system is able to forward a password reset link to the user's registered e-mail address. This enables the system to assist the user in recovering their password without any intervention from the manufacturer or system administrator.

In order to use the password recovery feature, the account must have previously been configured with a valid e-mail address. When the user attempts to recover a lost or forgotten password, the system will generate a new password and send a password reset message to the user's registered e-mail address.

If the user does not have access to the registered e-mail address, the user will have to contact the customer service department of the manufacturer for further assistance.

If the user does have access to the registered e-mail address, they will receive a password reset message which contains a link the user may use to reset their password. To reset a password, click the "Forgot your password?" link located in the login panel.

Figure 8 - Recovering a forgotten password

The system will redirect the user to the Forgot your password page. After entering their registered e-mail address, the user must click the Submit button to initiate the password reset process.

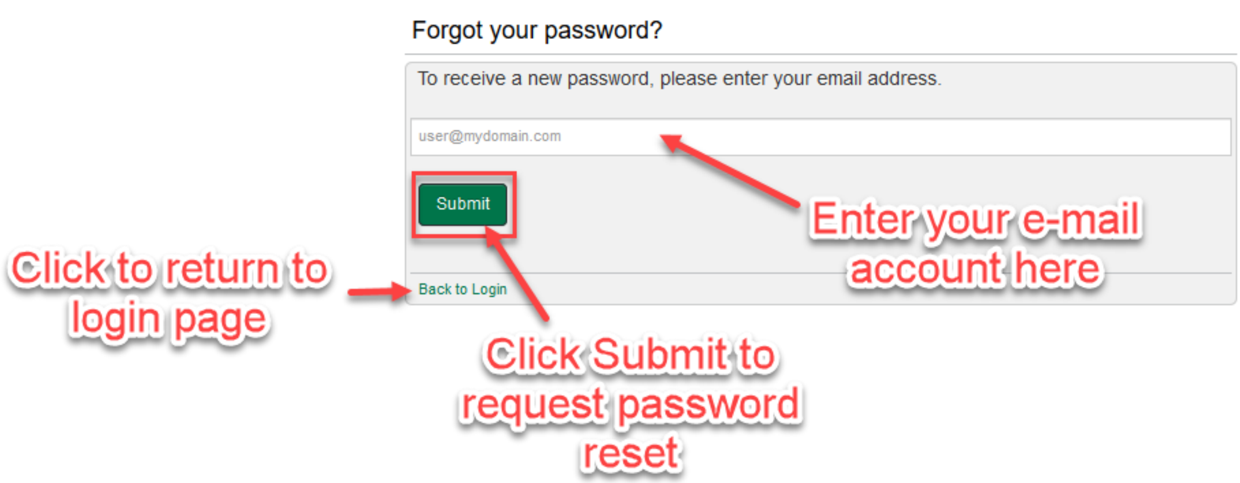
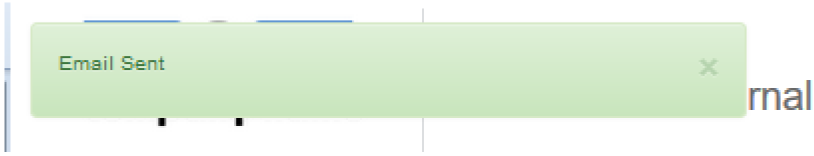
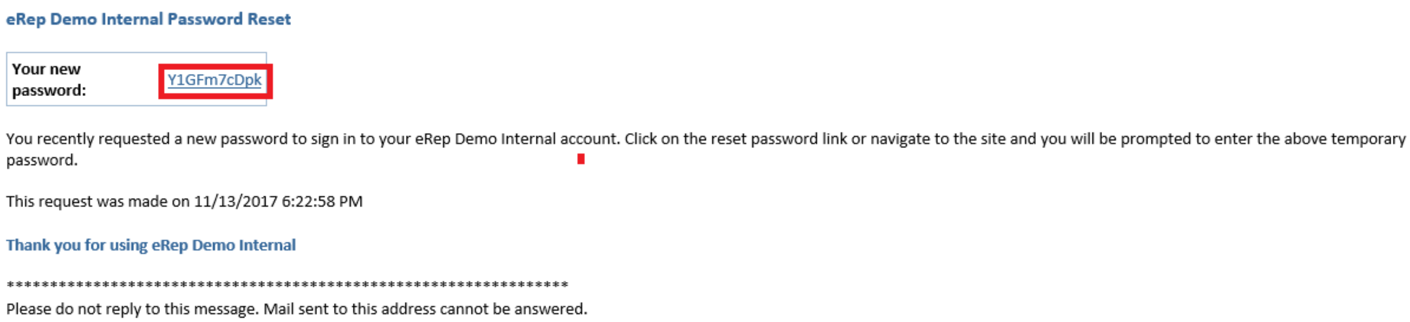


Figure 9 - Password reset page

If a valid and correct e-mail address is entered, the user will receive a message similar to the following.



Within short time period, (usually under 30 seconds), the user should receive a password reset e-mail that contains a link that the user may click on to reset their password. An example of the password reset message is shown in the figure below.



eRep Demo Internal Password Reset

Your new password:	Y1GFm7cDpk

You recently requested a new password to sign in to your eRep Demo Internal account. Click on the reset password link or navigate to the site and you will be prompted to enter the above temporary password.

This request was made on 11/13/2017 6:22:58 PM

Thank you for using eRep Demo Internal

****
Please do not reply to this message. Mail sent to this address cannot be answered.

If the message is not delivered within 5 or 10 minutes, the user should check their junk, Spam or clutter folders.

ERRORS

If an improperly formatted e-mail address is entered, the system will display an error message as shown in the figure below.

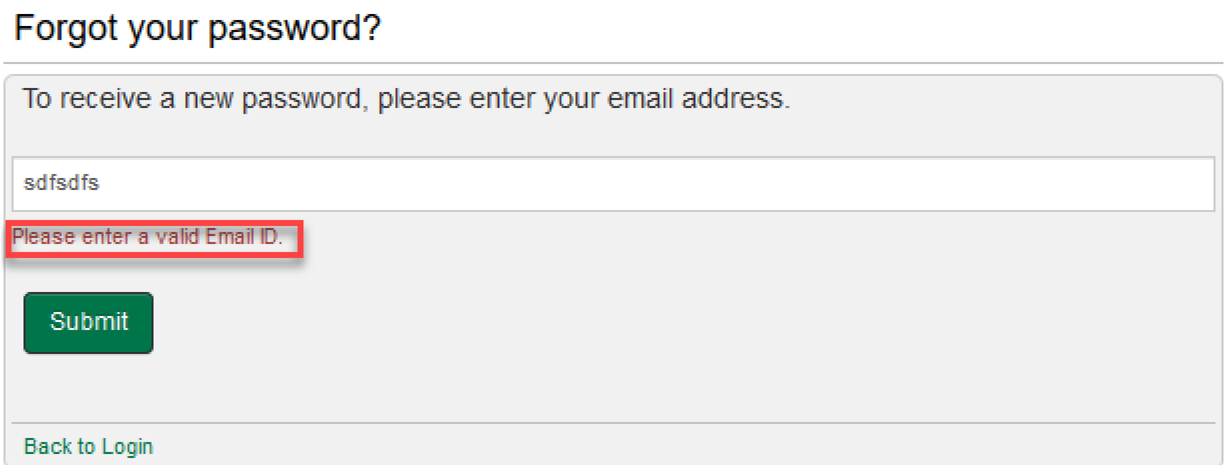


Figure 10 - Invalid e-mail address

If the system cannot locate an e-mail address that is associated with an account the user will receive the following message.

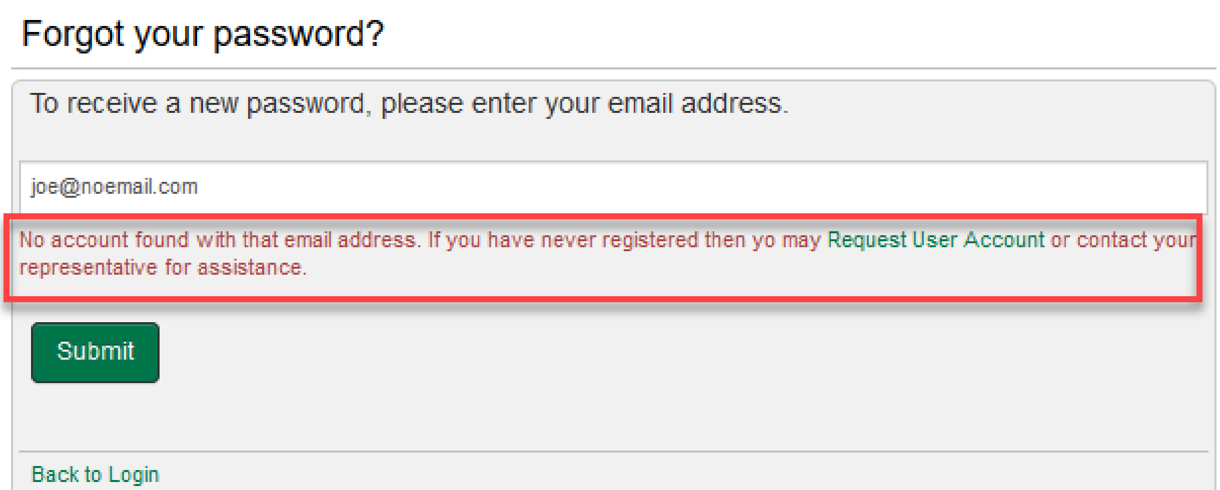


Figure 11 - Invalid e-mail address message

In this case, the user should attempt to use a different e-mail address. As suggested by the prompt, if the user cannot remember the e-mail address that used during the registration process, the user should contact the manufacturer's customer service department or factory representative for assistance.

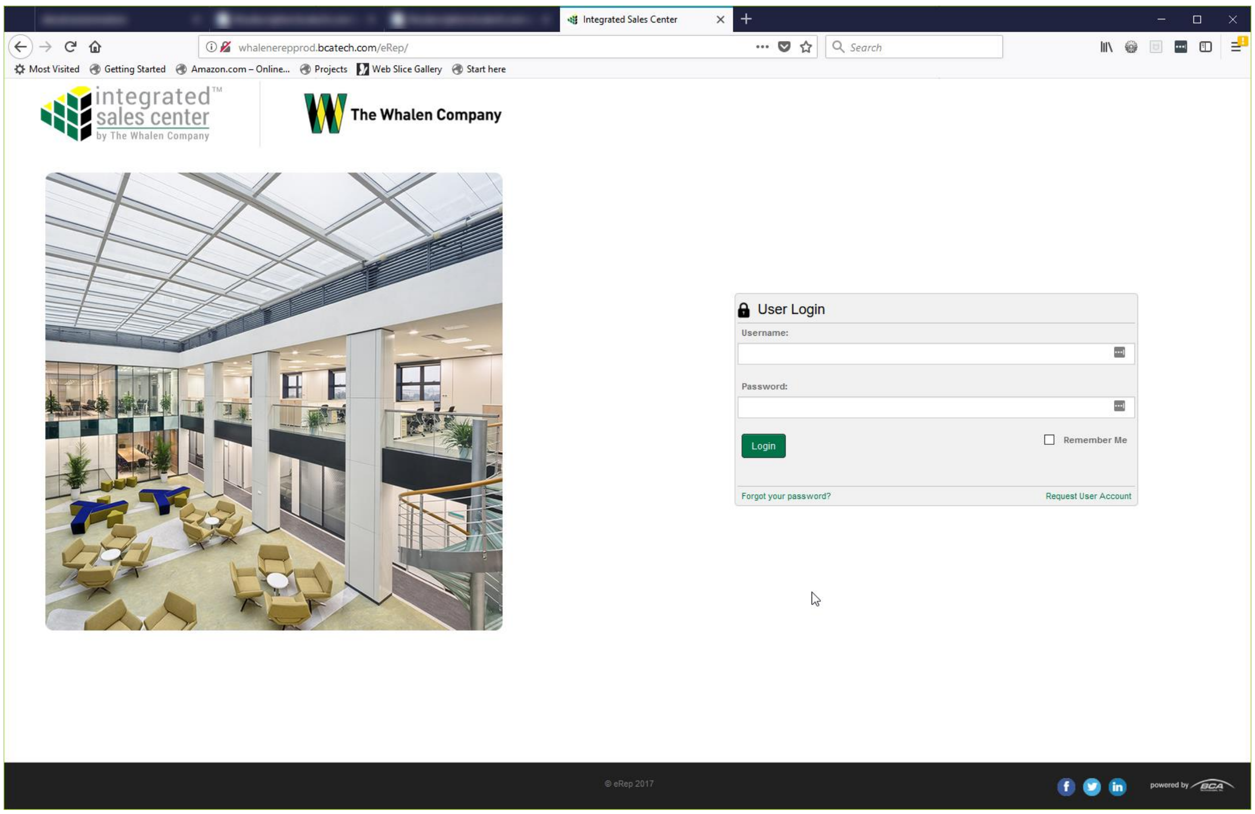
HOW TO LOGIN

To use the eRep system, each user must have their own individual login account and password. Requiring an account for each user has several benefits as outlined below.

- Assures that only authorized individuals may access the system.
- Keeps projects, order and quotes organized.
- Allows users to return to the system and view past projects, quotes and orders.
- Enables secure communication between individual users and the manufacturer.
- Allows the manufacturer to assign roles to users in order to control actions that a user may perform.

Whalen allows new users to their system to request a user account. View the help topic "Requesting a User Account" elsewhere in this user manual.

Logging in to the system requires a verified user account and password. To login to the eRep system, navigate to the URL provided by the manufacturer. Once connected to the correct URL, a login page similar to the following will be displayed.



TO LOGIN

Enter the username provided by the manufacturer. Usernames must be unique throughout the system and are generally not an e-mail address. Usernames may be a maximum of 150 characters in length.

Enter the account password. Passwords may consist of any valid alphanumeric character string and may be a maximum of 20 characters in length. Users are encouraged to create and use secure passwords. For more information on creating a secure password, please view the help topic "Creating a secure password" elsewhere in the user manual.

Lost or forgotten passwords may be recovered by clicking on the "Forgot your password?" link located at the bottom of the User Login panel. For more information regarding recovering passwords, view the help topic entitled "Forgotten Passwords" located elsewhere in this user manual.

Once the username and password have been entered, the user must click the Login button to proceed. The system will attempt to confirm that the username and password entered are correct. If the user is authenticated the system will redirect the user to their dashboard.

LOGIN ISSUES

There are several issues that may prevent a user from logging in to the system. These issues may range from an incorrect username or password, non-existent user accounts, or accounts that have been marked as inactive. In the section that follows are some common login issues and some suggestions on resolving them.

If a user account is inactive the user will receive an error message when attempting to login even if the username and password entered are correct. Inactive users will see the following message in the User Login panel.

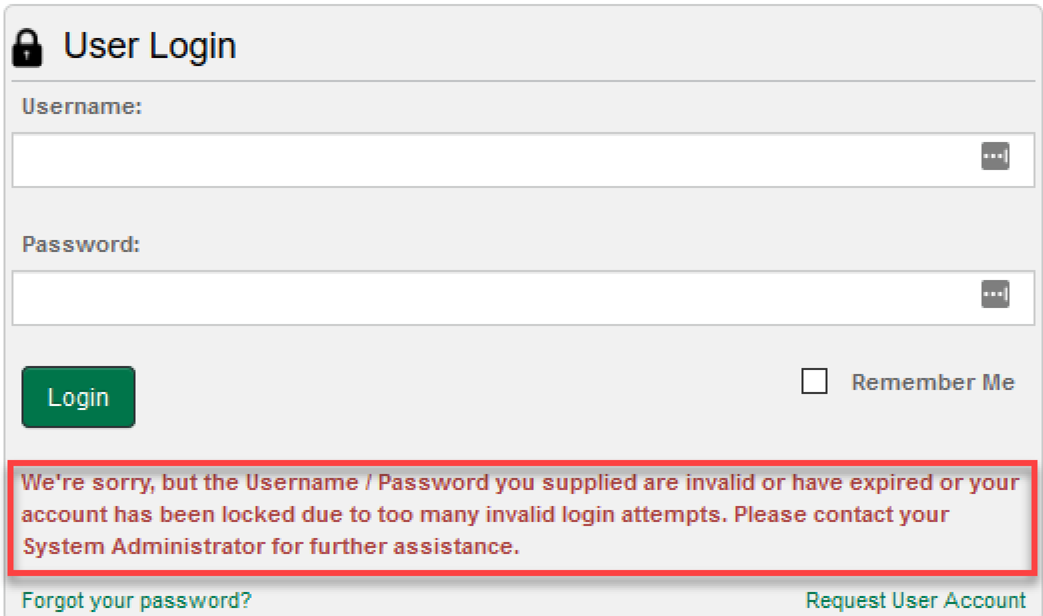


Figure 12 - Invalid user or password message

MY PROFILE

Each user account has a profile associated with the account. A user profile is a visual display of personal data associated with a specific user, or a customized desktop environment. A profile refers to the explicit digital representation of a person's identity. In the eRep system a user profile contains the address and contact information for a user along with settings that control the user's permission levels and connection properties.

Depending upon a user's permission level, some profile settings may be modified by the user.

The user's profile settings are accessible from any eRep page by selecting "My Profile" from the user's popover as shown in the figure below.

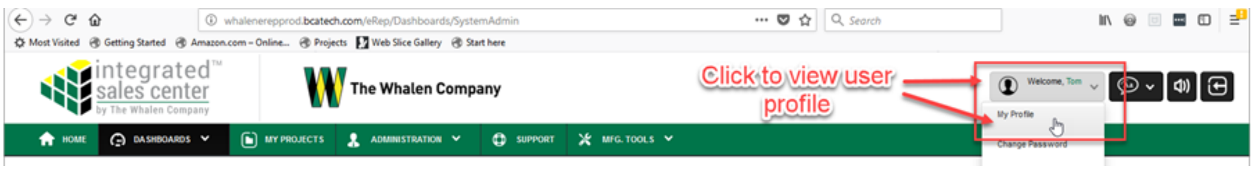
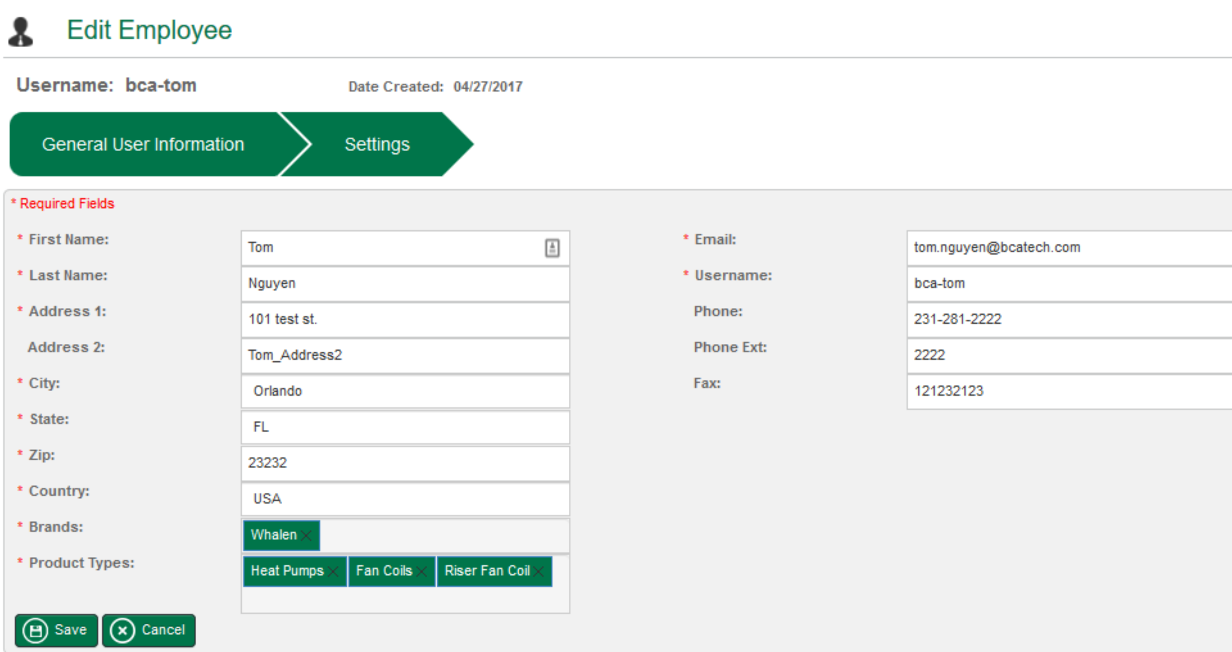


Figure 13 - Viewing a user's profile

The user will be redirected to the Edit Employee page, where depending upon the user's permission level, a page with the user's general information will be displayed.



The Edit Employee page is divided into two sections; General User Information and Settings.

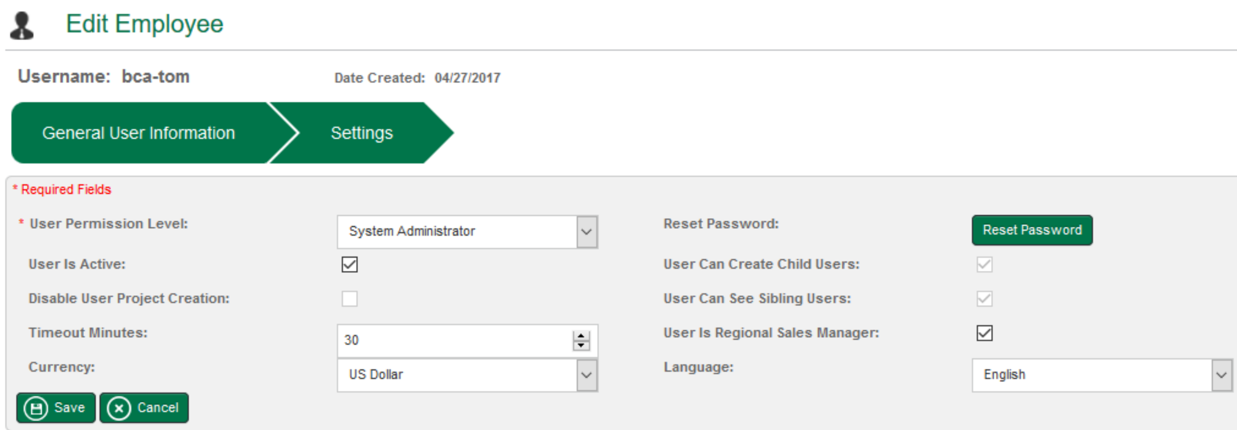
GENERAL USER INFORMATION

The General User Information section displays the user's name and contact information. It also controls the brands and product types to which the user has access.

Each field in the General User Information tab is explained in the table below.

Field	Description	Required
First Name	The first name of the user (Maximum of 150 characters)	Yes
Last Name	The last name of the user (Maximum of 150 characters)	Yes
Address 1	The primary physical address of the user (Maximum of 250 characters)	Yes
Address 2	Address information continued from Address 1. May represent a suite or building number (Maximum of 250 characters)	No
City	The physical city location of the user (Maximum of 250 characters)	Yes
State	The physical state of the user (Maximum of 150 characters)	Yes
Zip	The Zip/Postal Code of the user (Maximum of 50 characters)	Yes
Country	The Country in which the user resides (Maximum of 250 characters)	Yes
Brands	The brands of products to which the user will have access. The brands available will depend upon the company. Multiple brands are allowed.	Yes (at least one brand is required)
Product Types	The product types to which the user will have access. The product types are dependent upon the brands and products available.	Yes (at least one product type is required)
Email	The user's primary e-mail address. This is the address to which all system correspondence, such as multiplier and engineering requests and responses are sent. This e-mail address is also used as the recovery e-mail address if the requests a password reset. (Maximum of 250 characters)	Yes (a valid e-mail address in the format of account@domainname is required)
Username	The login username. This is the name that the user uses when logging in to the eRep system. (Maximum of 150 characters)	Yes
Phone	The primary phone number of the user account (Maximum of 30 characters)	No
Phone Ext	The extension of the primary phone number used to reach the user.	No
Fax	The user's fax (facsimile) phone number. (Maximum of 30 characters)	No

SETTINGS



The settings tab contains several properties that control how the user may interact with the system and the level of activities that may be performed by the user. Each setting is defined in the table below.

Field	Description	Required
User Permission Level	The permission level of the user account. Permission levels control the level to which the user may interact with the system and the specific functions they may perform. Users should only be granted the minimum level permission level necessary to perform the functions necessary. A complete explanation of permission levels may be found in the help topic entitled "Permission levels" elsewhere in the user manual.	Yes
User Is Active	If checked, the user account may login to the eRep system. If not checked, the user may not login to the system	No
Disable User Project Creation	If checked, this prevents the user account from creating new projects. This may be useful for certain types of users, such as customer service representatives. This option is not available for users with the permission level of System Administrator	No
Timeout Minutes	Specifies the maximum amount of time (in minutes) that a user may be logged into the system without any activity before the system logs them out. The default time period is 30 minutes. Longer periods allow the user to be logged in longer between sessions but may also pose a security risk if the user leaves their device unattended for long periods of time.	Yes
Currency	The currency specified controls which currency is displayed to the user when performing pricing functions, such as quoting and ordering. When the system displays currency amounts, it will translate between the brand currency and the user's currency setting. For example, if a manufacturer sets their brand currency to Canadian dollars and the user's currency preference is set to US Dollar the system will automatically convert the prices from Canadian to US any time pricing information is displayed.	Yes
User Can Create Child Users	If checked, the user is allowed to create new user accounts. All user accounts that the user creates will be child user accounts of their user account. Typically reserved for users that need to create user accounts. Typically, a rep manager, office manager or other individual that manages other accounts would be assigned this ability. Always selected for users with the System Administrator permission level.	No

User Can See Sibling Users	If checked, the user is allowed to view other user accounts that exist at the same level as their account. Typically assigned to users that have the ability to create child users. Always selected for users with the System Administrator permission level.	No
User Is Regional Sales Manager	If checked, the user is considered a Regional Sales Manager in addition to the functions allowed by the user's permission level. Regional Sales Managers typically are the users that receive multiplier requests from user account. See the help topic entitled "Multiplier Requests" for more information.	
Language	Currently, the eRep application has been translated into English, Spanish and French. By selecting a language, the system will display all text in the language selected.	Yes

When you are done making changes to your user profile, click the “Save” button to save the changes. If any required fields are missing the user will be informed of the error and given the chance to correct the issues.

MY DASHBOARD

Once logged on to the site the user will be redirected to the main dashboard page as shown in the figure below.

From the main dashboard page users can view projects and various other items. Depending upon the user account privileges/level other items may appear on the dashboard that will provide statistical information regarding the account.

Each dashboard is briefly detailed in the following sections. Depending upon the user's permission level, some dashboards may not be visible or accessible.

To view the various dashboards the user must click the DASHBOARDS menu as shown in the following figure.

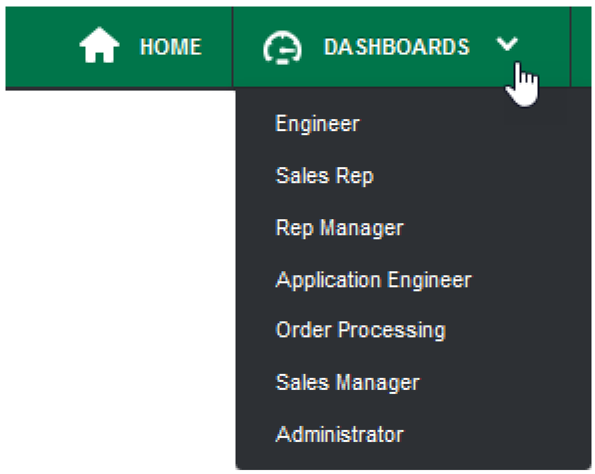


Figure 14 – Dashboards

ENGINEER DASHBOARD

The Engineer Dashboard is most commonly accessed by customer accounts with an Engineer permission level. An example of the dashboard is shown below.

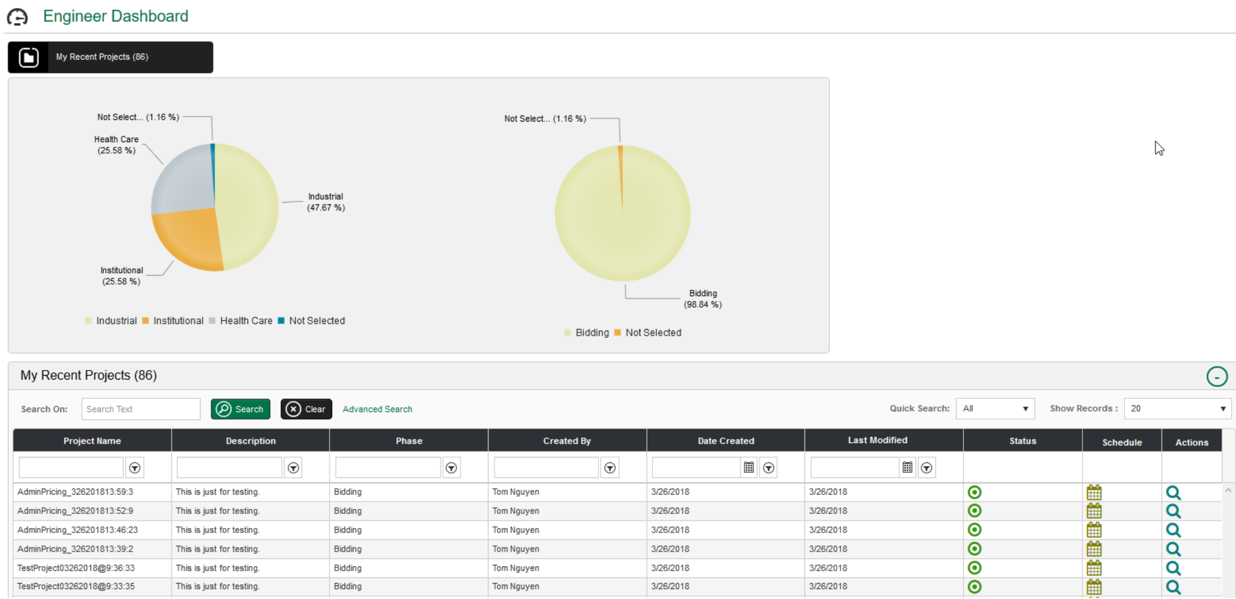
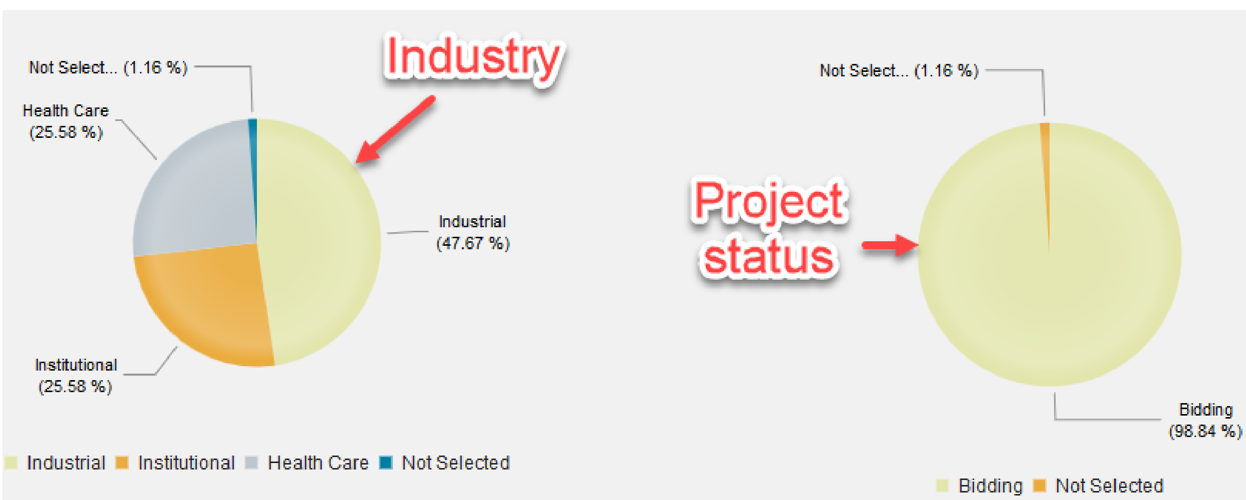


Figure 15 - Engineer dashboard

INFORMATION CONTAINED

The information contained on the Engineer dashboard is helpful to customer engineers and displays statistical data related to the industry to which projects are created. The charts displayed at the top of the dashboard also break down the percentage of projects and their status.



A grid of projects is displayed on the bottom half of the dashboard page. This searchable and sortable grid allows the user to locate a specified project and view certain details of the project.

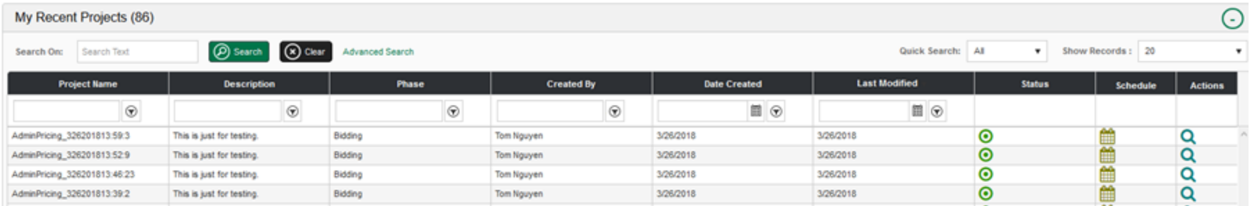


Figure 16 - List of projects

The user may search the list of projects by using the Search features located at the top of the grid. For more information on searching please view the topic "[Searching]" located elsewhere in the user manual.

Once a project is located, the user may view the [project schedule] or [project information] clicking the appropriate icon contained in the grid.

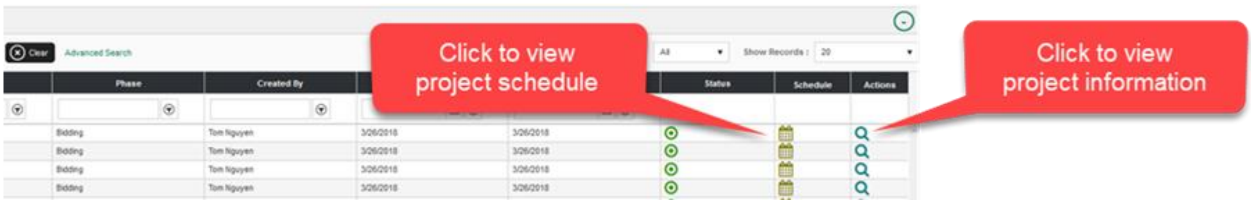


Figure 17 - Viewing project schedule or information

SALES REPRESENTATIVE DASHBOARD

The Sales Representative Dashboard is most commonly used by sales reps to view their projects, quotes and orders. An example of the Sales Representative Dashboard is shown in the figure below.

Figure 18 - Sales Representative Dashboard

The dashboard is divided into two sections; links to projects, quotes and orders, and statistical information related to sales.

LINKS

The links on the left side of the dashboard may be used by the sales rep to quickly navigate between projects, quotes and orders.

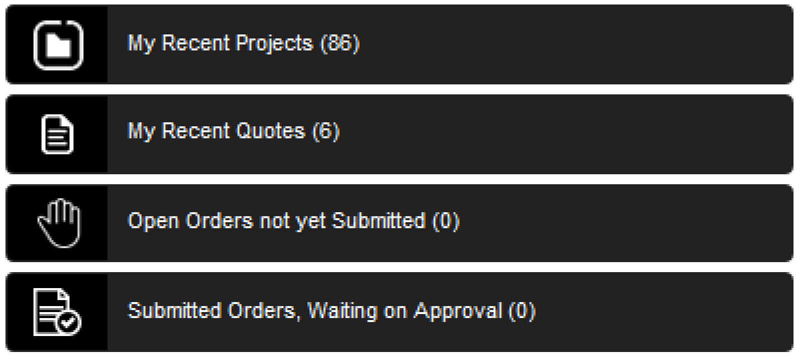


Figure 19 - Quick links

The right side of the sales representative dashboard contains several quick links that allow the user to quickly navigate to sales related items. Each link is detailed below.

- My Recent Projects
- My Recent Quotes
- Open Orders not yet submitted
- Submitted Orders, Waiting on Approval

MY RECENT PROJECTS

This link redirects the user to a page that contains a grid of their most recent projects. Projects on this page are displayed in chronological order from newest to oldest. From this list, the user may view the project schedule or project information.

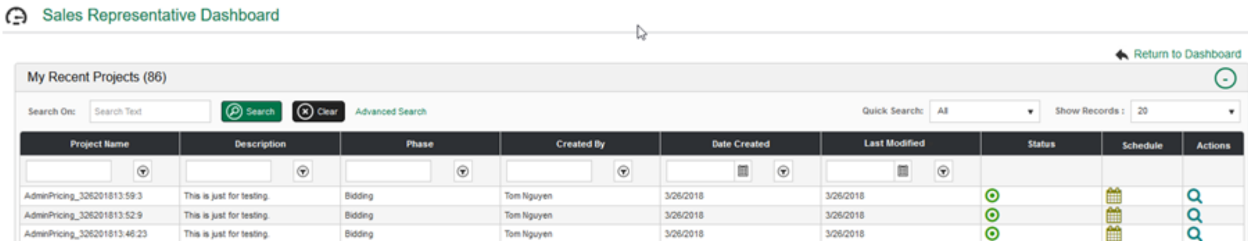


Figure 20 - My recent projects

MY RECENT QUOTES

Clicking the My Recent Quotes link redirects the user to a page that contains a list of their most recent quotes sorted from newest to oldest. From the list displayed, the user may click the magnifying glass icon to view or edit the details of the quote. See the help topic "Quotes" for more information on creating and managing quotes.

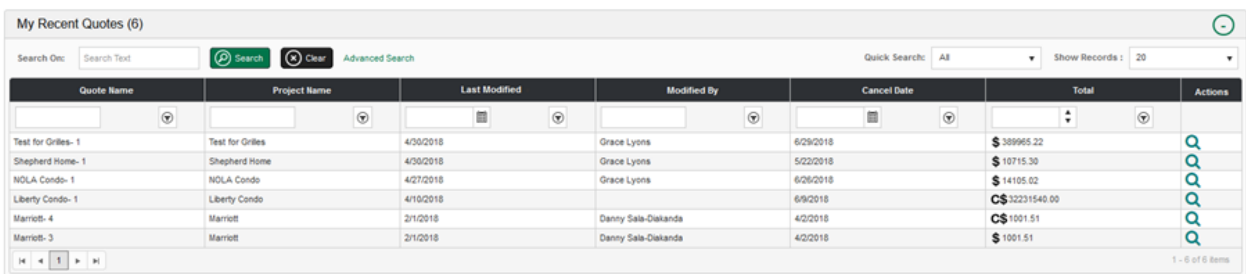


Figure 21 - My recent quotes

OPEN ORDERS NOT YET SUBMITTED

When the user clicks the Open Orders Not Yet Submitted link, a page displaying a list of orders that have been created, but not submitted to the factory will be displayed. This helps the rep determine the orders that may require further processing or attention before being able to be submitted to the factory for review.

SUBMITTED ORDERS, WAITING ON APPROVAL

This dashboard displays the orders that have been submitted to the factory by the sales representative but have not been approved. Before manufacturing or order fulfillment may take place, the order must be submitted to the factory by the sales rep. Someone at the manufacturing office, must review the order to ensure that it is correct and once the order is approved, be submitted to the factory for manufacturing.

REP MANAGER DASHBOARD

This dashboard is most commonly used by Sales Rep Managers to view information related to their sales reps and their sales and outstanding requests. An example of the Rep Manager Dashboard is displayed in the figure below.

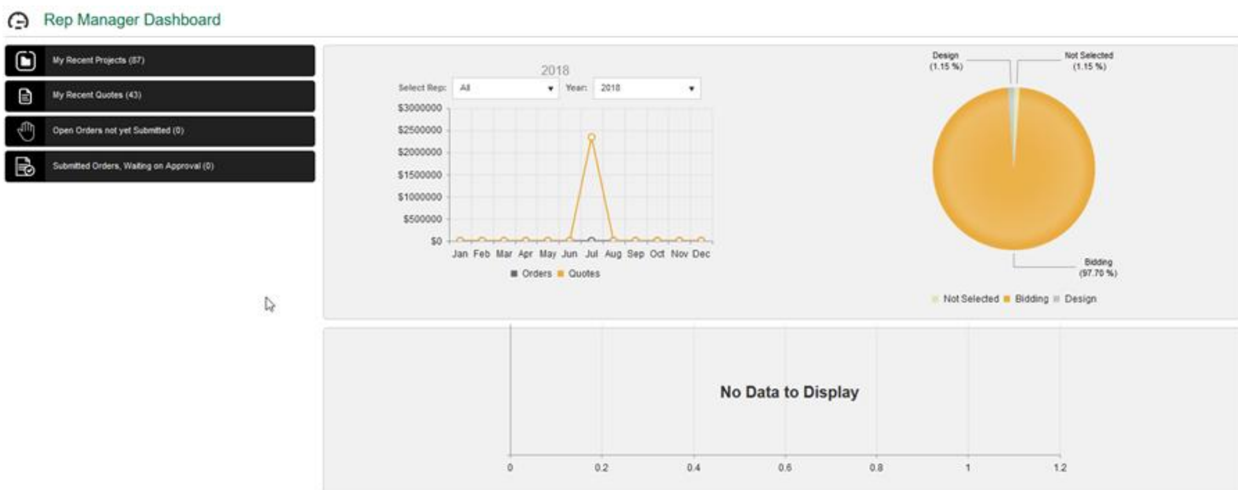


Figure 22 - Sales Rep Manager dashboard

Similar to the Sale Rep dashboard, the Rep Manager dashboard contains several quick links that allow the user to quickly navigate to sales related items. Each link is detailed below.

- My Recent Projects
- My Recent Quotes
- Open Orders not yet submitted
- Submitted Orders, Waiting on Approval

APPLICATION ENGINEER DASHBOARD

Application Engineers typically work for the manufacturer at the factory or manufacturing plant and they are the users that most typically review technical requests and product specifications made by a sales representative prior to the request begin sent to the factory for manufacturing.

Special engineering requests, such as product modifications, typically must be reviewed, approved and priced before manufacturing or modification of the product may be made. For example, if a sales rep requests a material or engineering change, it must be reviewed by an application engineer before it can proceed to manufacturing.

To request a review of the modification, the sales representative will submit a "Special Engineering Request" to an application engineer. Once submitted, the quote or order will be displayed in the Application Engineer Dashboard. From here, the application engineer may review it and either approve or deny the request and send it back to the rep.

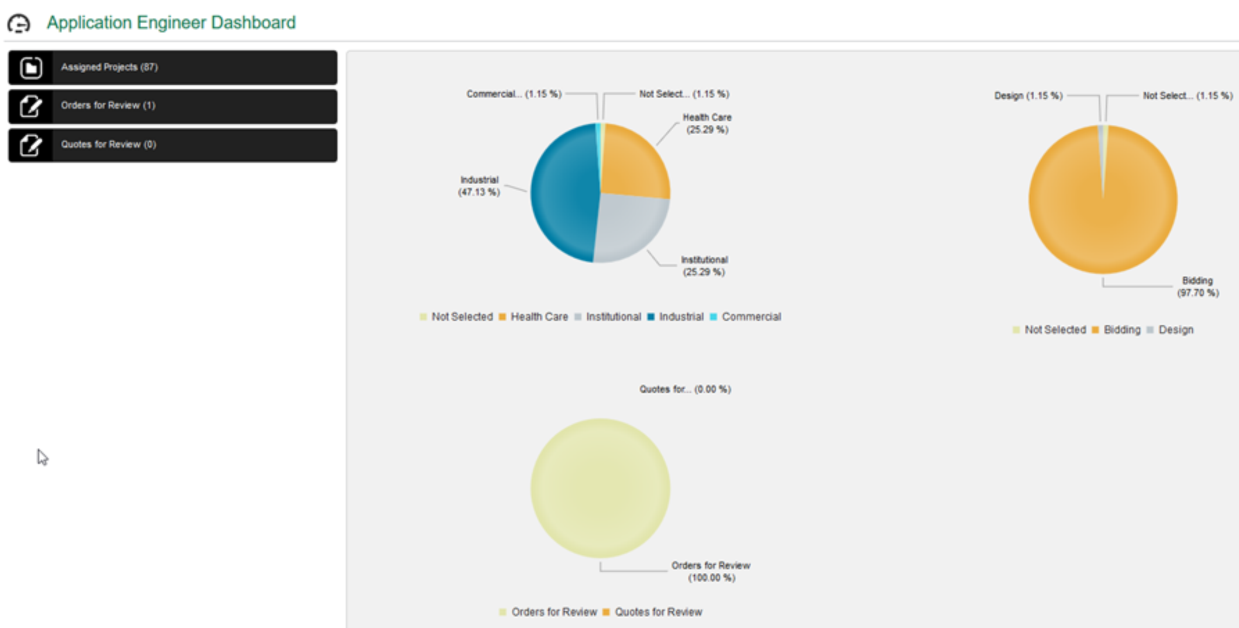


Figure 23 - Application engineer dashboard

Like the other dashboards, the Application Engineer Dashboard is divided into two sections; the left panel contains quick links to projects, quotes and orders, while the right panel displays graphs and charts that contain data about the type, status and industry of the projects.

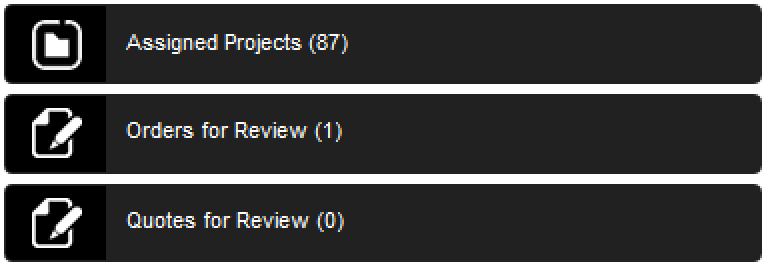


Figure 24 - Quick links

Clicking the Assigned Projects button redirects the user to a grid that displays a list of projects assigned to the user. The grid displays the project name, description and other pertinent information about the user's projects.

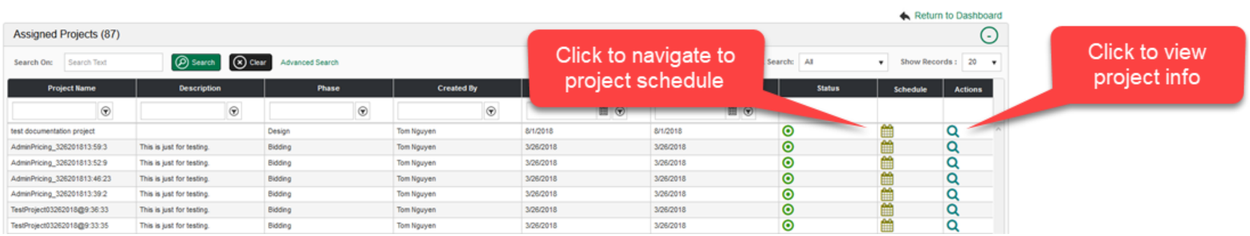


Figure 25 - Assigned Projects grid

To view the orders that need to be reviewed by the engineering department, the user must click the Orders for Review button. This will redirect the user to a page that will display a grid of orders that reps have submitted for review.

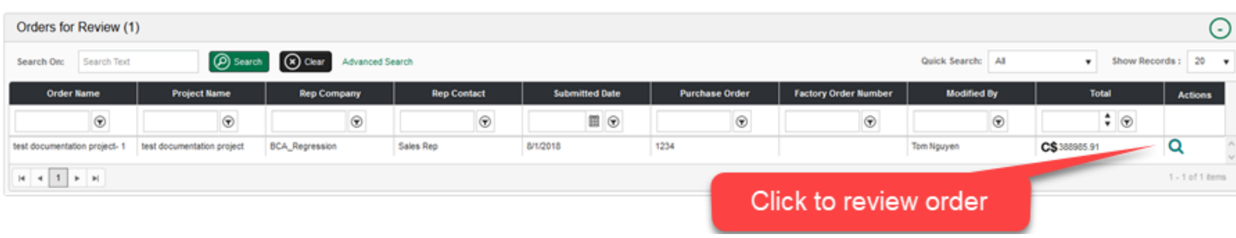


Figure 26 - Orders for review

Similarly, application engineers may review quotes that have been submitted by clicking the Quotes for Review button. A grid of quotes that are awaiting review will be displayed.

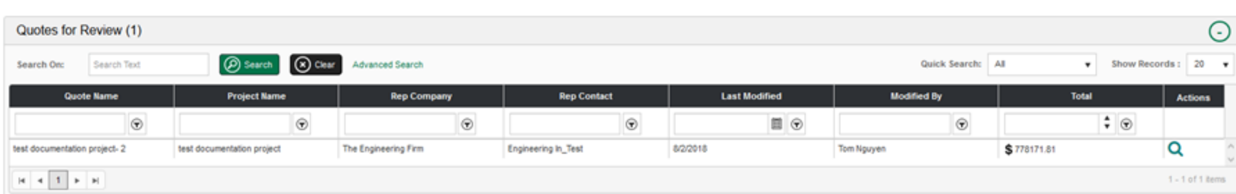


Figure 27 - Quotes for review

ORDER ENTRY DASHBOARD

Generally used by manufacturer employees, the Order Entry dashboard displays a list of orders that have been submitted for processing. The Order Entry dashboard contains four individual panels that display a grid of submitted orders with specific statuses. Below is a list of each type of order that may be present on the Order Entry dashboard.

- New Orders Submitted – With Specials
- New Orders Submitted – No Specials
- New Orders Submitted – Pending Financial Approval
- Approved Orders

NEW ORDERS SUBMITTED – WITH SPECIALS

Specials refers to orders that have been submitted with special engineering requests. These are separated from orders without special engineering requests due to the possibility that a special engineering request may lengthen the time for the manufacturing process due to the nature of the request.

This section contains a list of all the orders that have been submitted with some sort of special engineering request. See the figure below for an example.

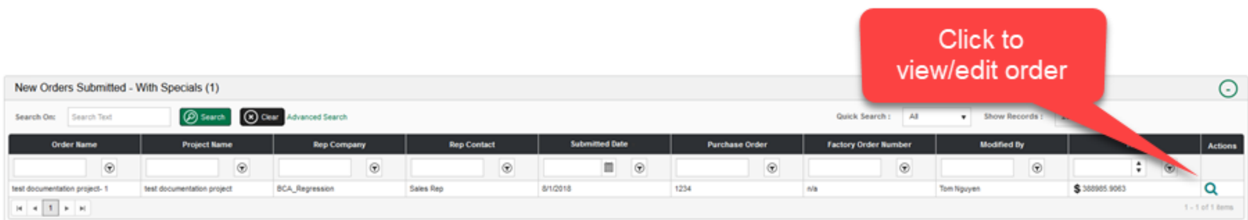


Figure 28 - Submitted orders with Special Engineering Requests

NEW ORDERS SUBMITTED – NO SPECIALS

Orders that have been submitted to the factory without special engineering requests will be displayed in this grid. Since these orders do not require any modifications from the standard manufacturing process, it is likely that they will be able to be processed within the normal standard manufacturing time period for the product specified.

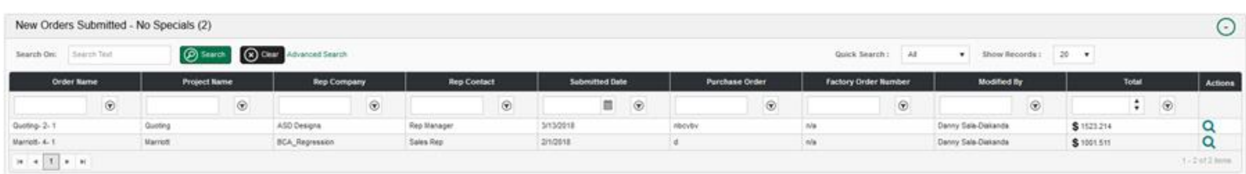


Figure 29 - Submitted orders without Special Engineering Requests

NEW ORDERS SUBMITTED – AWAITING FINANCIAL APPROVAL

Orders displayed here have been submitted by the customer service, reps or other users to the credit department for financial review. Employees in the manufacturer's credit or accounting department may review the orders and customer documentation in anticipation of approving the credit request. Once an order has been reviewed it may be either sent back to the rep for additional documentation or it may be approved and sent to the manufacturing department for fulfillment.

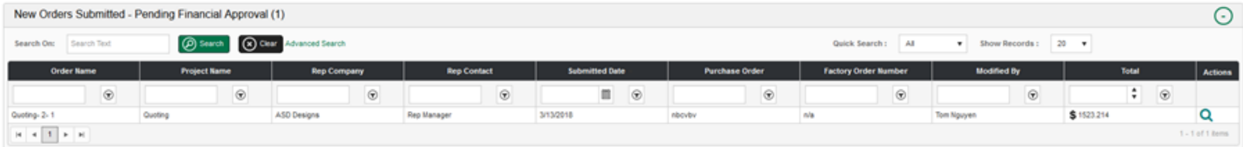


Figure 30 - Orders awaiting financial approval

APPROVED ORDERS

An approved order is an order that has been reviewed by the Order Entry department and has been approved by the finance department. Approved orders are cleared for the manufacturing process. Orders displayed in this grid are ready for the manufacturing process.

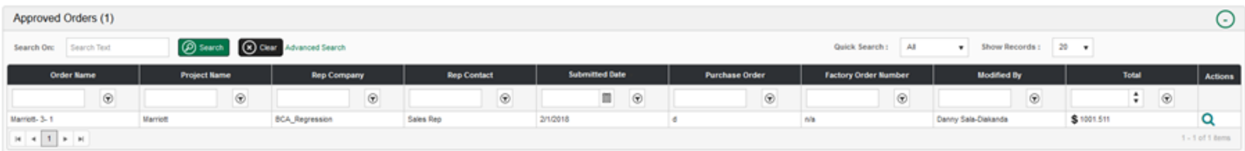


Figure 31 - Approved orders

SALES MANAGER DASHBOARD

The Sales Manager Dashboard contains information relevant to the sales process and is mostly used by Rep Managers, Regional Sales Managers to view quotes and orders with open special multiplier requests.

The dashboard is divided into two panels; the left panel displays links to sales manager related pages while the right panel displays graphs that depict statistical information related to sales performance, project phases and order and quote statuses.

See the figure below for an example of the Sales Manager Dashboard.

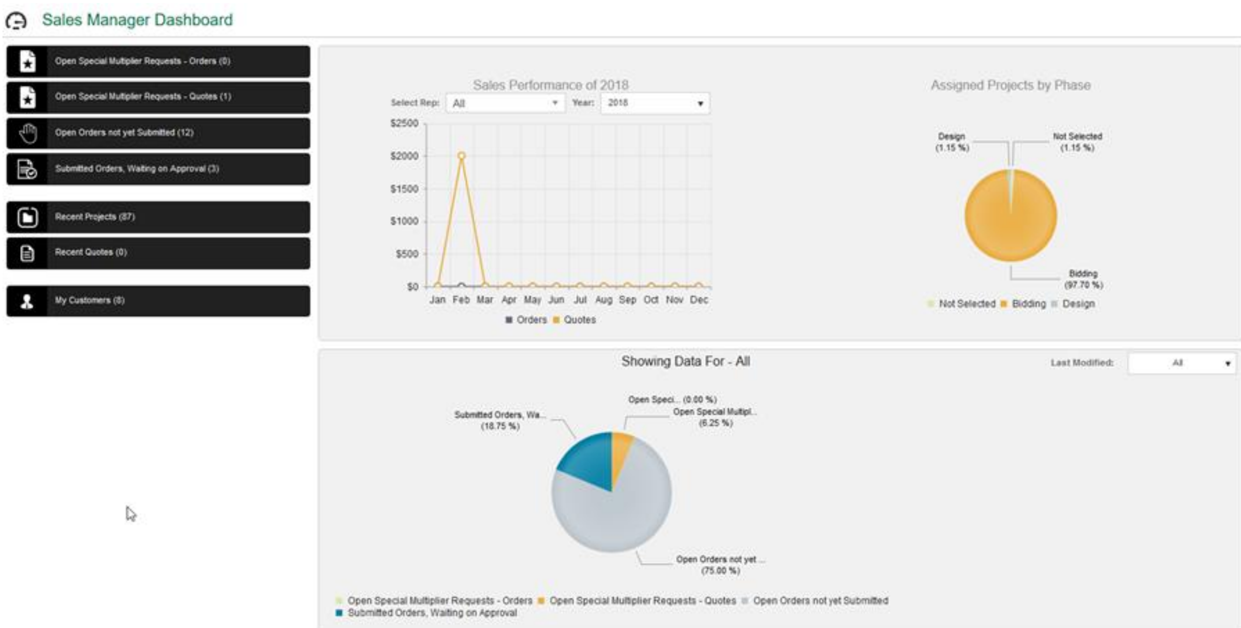


Figure 32 - Sales Manager Dashboard

Within the left panel are links that allow the user to quickly navigate between Sales Manager related pages. See below for more information about the links.

- Open Special Multiplier Requests – Orders
- Open Special Multiplier Requests – Quotes
- Open Orders not yet submitted
- Submitted Orders, Waiting on Approval
- Recent Projects
- Recent Quotes
- My Customers

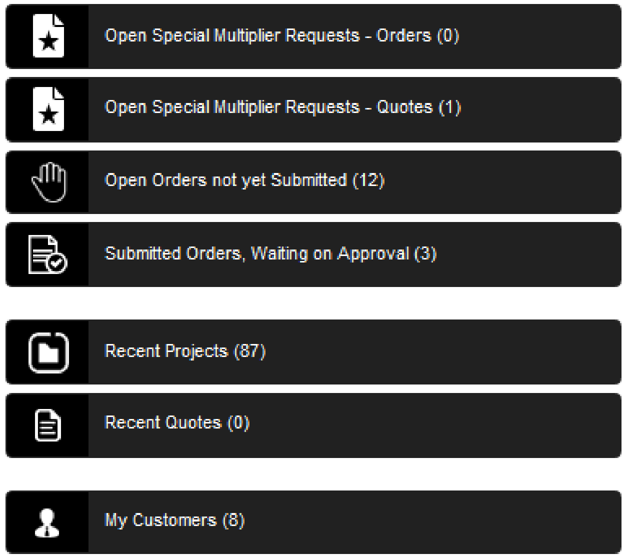


Figure 33 - Sales Manager dashboard links

OPEN SPECIAL MULTIPLIER REQUESTS – ORDERS

Clicking this link redirects the user to the Sales Manager dashboard that displays a list of the orders awaiting review by a regional sales manager. Special Multiplier Requests are requests made by reps for a multiplier or commission rate different than the standard default multiplier rate. More information regarding [Special Multiplier Requests]() may be found elsewhere in this user manual.

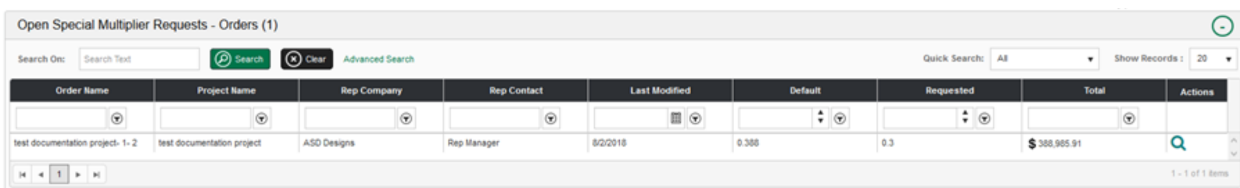


Figure 34 - Open special multiplier requests – orders

OPEN SPECIAL MULTIPLIER REQUESTS – QUOTES

To view quotes with special multiplier requests, the sales manager may click the Open Special Multiplier Requests – Quotes link. This will redirect the user to a page that will display a grid of quotes awaiting review by a regional sales manager. To review the quote, the user must click the magnifying glass next to the quote. Once reviewed by the sales manager, the quote may be sent back to the rep for further processing.

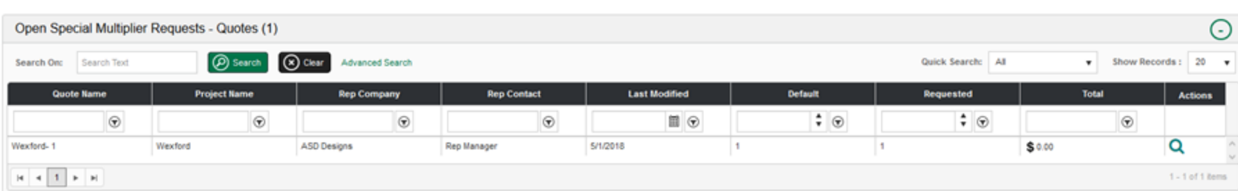


Figure 35 - Open special multiplier requests – quotes

OPEN ORDERS NOT YET SUBMITTED

This grid displays a list of orders that are open but have not been submitted to the factory for review or manufacturing. The sales manager may review any of the open orders by clicking the magnifying glass next to the order.

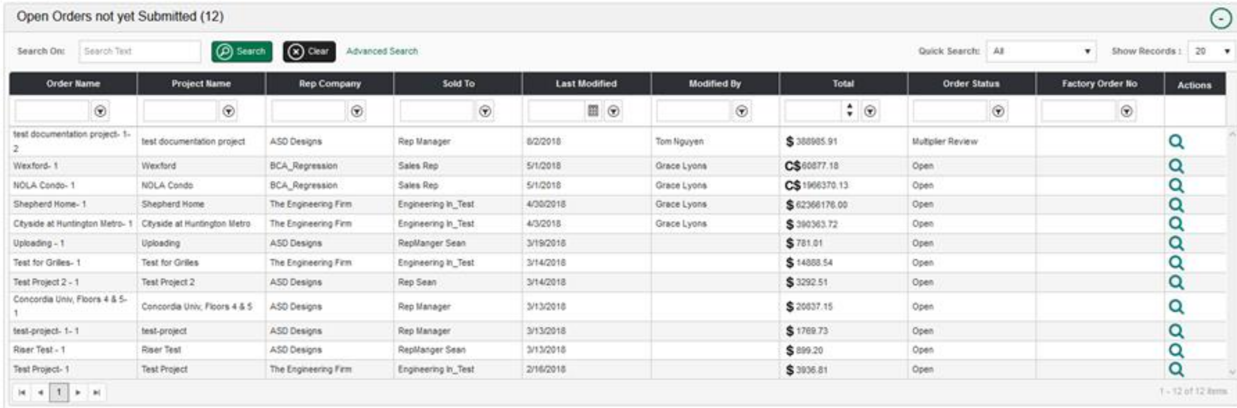


Figure 36 - Open orders not yet submitted

SUBMITTED ORDERS, WAITING ON APPROVAL

Contained within this grid are orders that have been submitted by a rep but are awaiting approval by the order entry or customer service department.

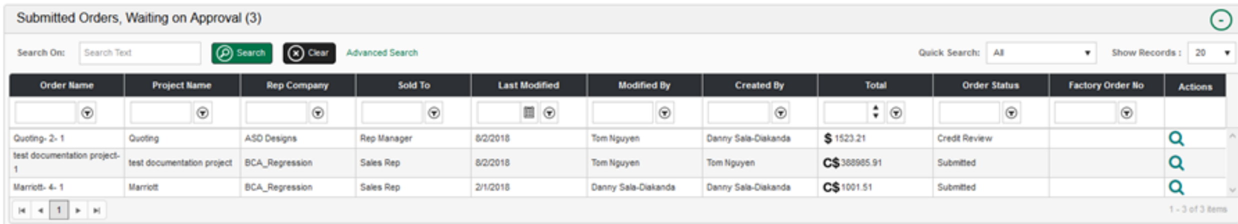


Figure 37 - Submitted orders, waiting on approval

RECENT PROJECTS

The recent projects grid displays the recent projects that are accessible by the user. This grid will display the same projects visible to the user from several other dashboards including the [Sales Rep]() dashboard.

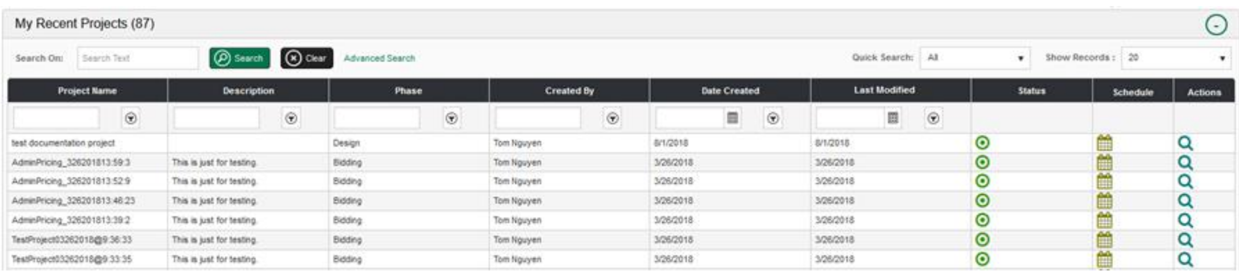


Figure 38 - Recent Projects

RECENT QUOTES

Viewing the user's recent quotes may be done by clicking the Recent Quotes link. This will redirect the user to a grid that displays the most recent quotes created by the user.

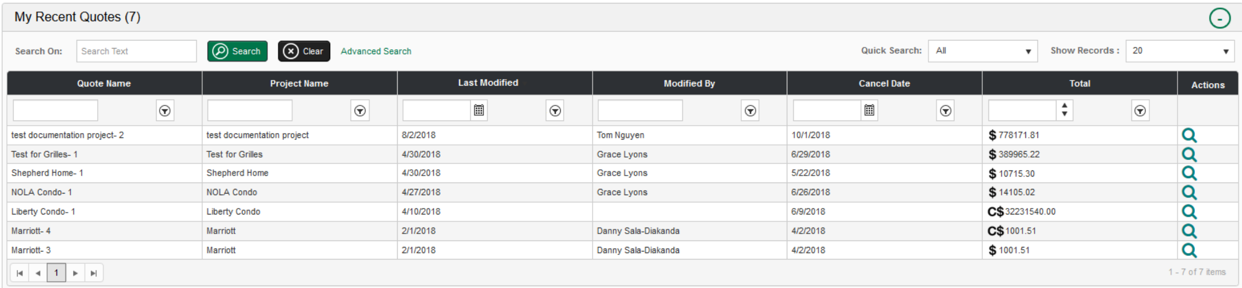


Figure 39 - Recent Quotes

MY CUSTOMERS

By clicking the My Customers link, the user will be redirected to the User Administration page where a list of the user's customers will be displayed. From here, the user may view/edit the details of or e-mail the customer directly from this grid. See the figure below for and example.

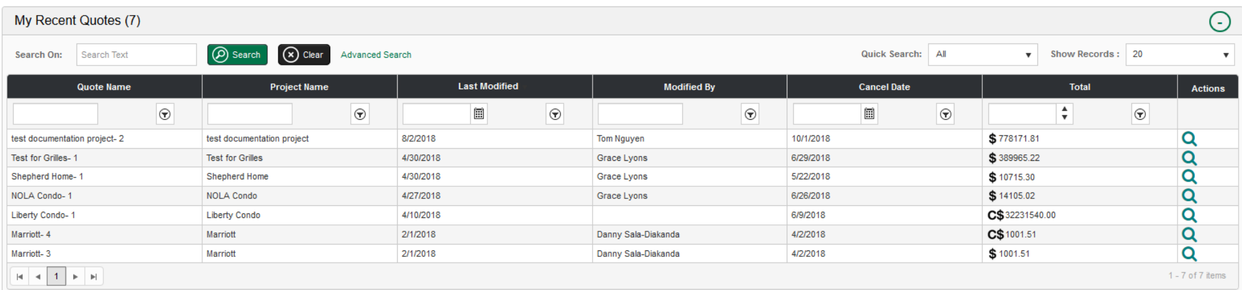


Figure 40 - My customers

ADMINISTRATOR DASHBOARD

The administrator dashboard displays new user requests and is used by system administrators to approve new user account requests as outlined in the section “Request a User Account”.

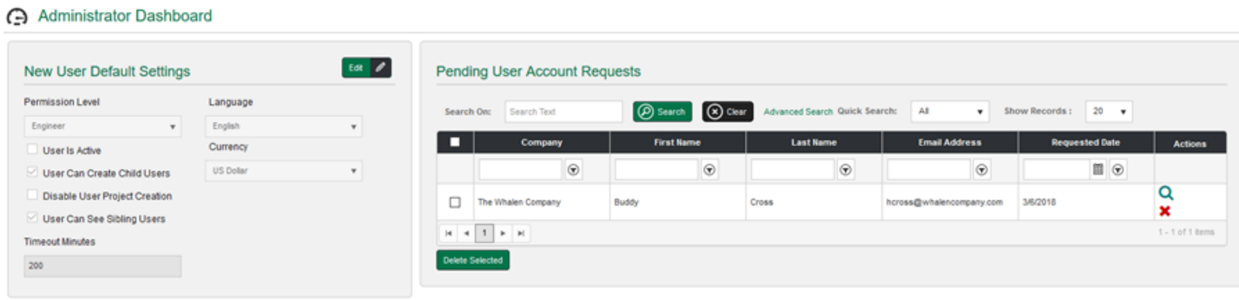


Figure 41 - Administrator dashboard

QUOTES

SPECIAL MULTIPLIER REQUESTS

APPROVE USER ACCOUNT REQUESTS

All users of the eRep application must have a user account. User accounts uniquely identify the user to the system and allow the system owner to control the level of access to the system. One of the ways for a user to receive an account is for the user to request one. This process is detailed in the topic "Requesting a User Account". All account requests must be approved by a system administrator.

To approve an account, the system administrator must login to the eRep application and select Administrator from the Dashboards menu.

To review the request the user must click the magnifying glass next to the request as shown in the figure below.

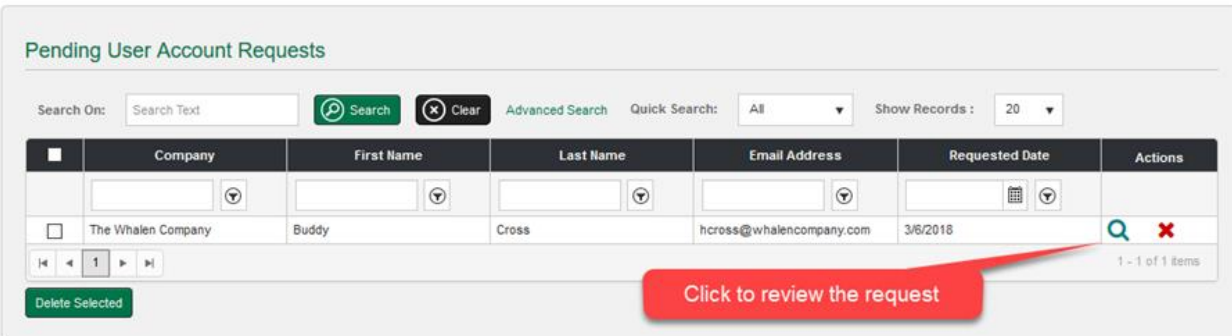


Figure 42 - Pending User Account Requests

The user will be redirected to the User Account Request Approval page. From here, the administrator may assign the user account to an existing company or create a new company if necessary.

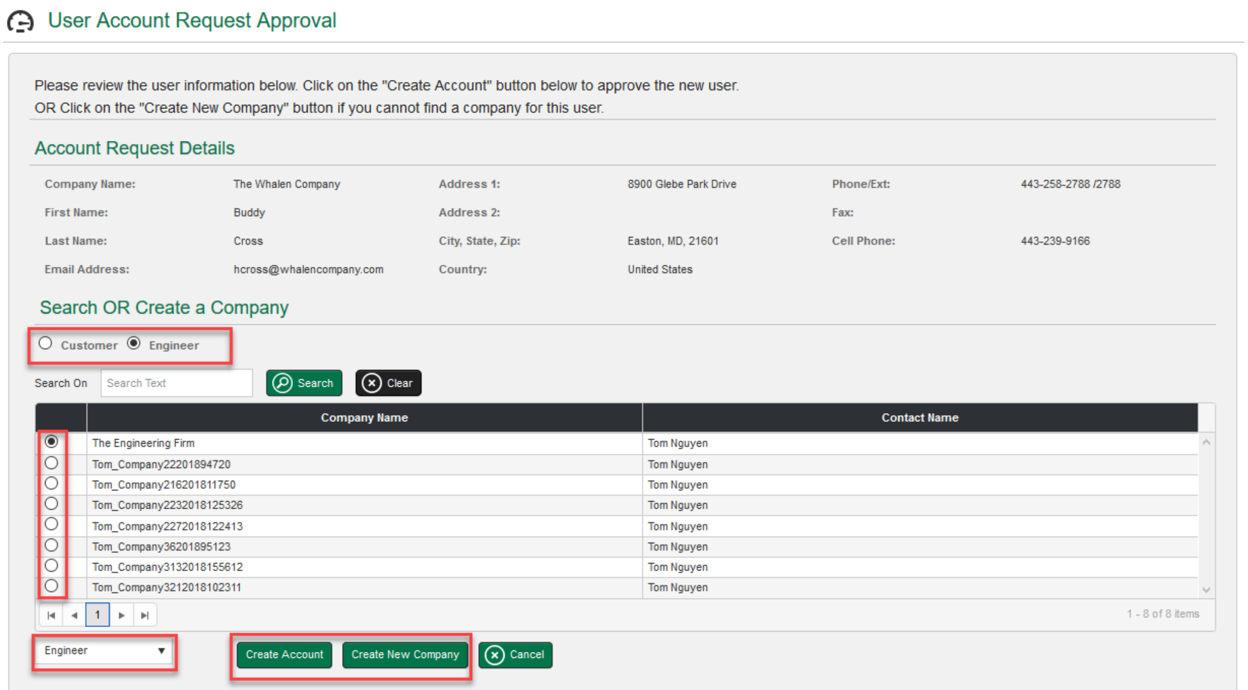


Figure 43 - User Account Request Approval

To complete the approval, the administrator must select the account type (Customer or Engineer), select the company to which to assign the account, select the permission level and click the Create Account button.

If a company doesn't exist to which the user may be assigned a new company will have to be created. To create a new company, click the "Create New Company" button. Follow the prompts to create a new company and return to the User Account Request Approval page, select the company and create the account. For more information related to creating a company, view the help topic "Creating a Company".

CREATING A COMPANY

To use the eRep application, users must have an account. When an account is created it is assigned to a company which represents an entity that orders products from the manufacturer represented by the eRep application.

Before a user account can be created and assigned to a company, the company must exist. Companies may be created from either the Administration menu or when approving a user account.

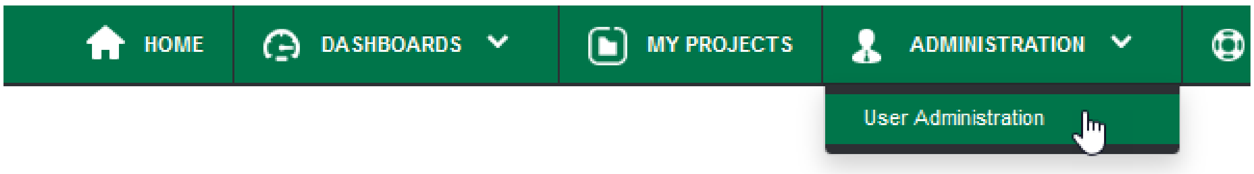


Figure 44 - Navigating to the User Administration menu

From the User Administration page, click the “Add New Engineering Company” button as shown in the figure below.

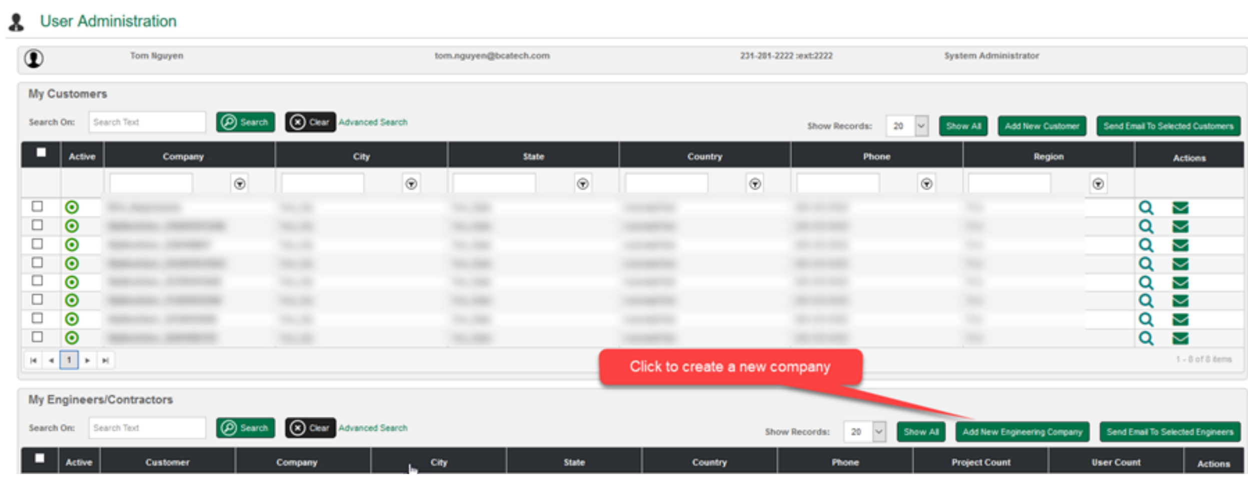


Figure 45 - Engineering companies

The Add New Engineering Company page will be displayed.

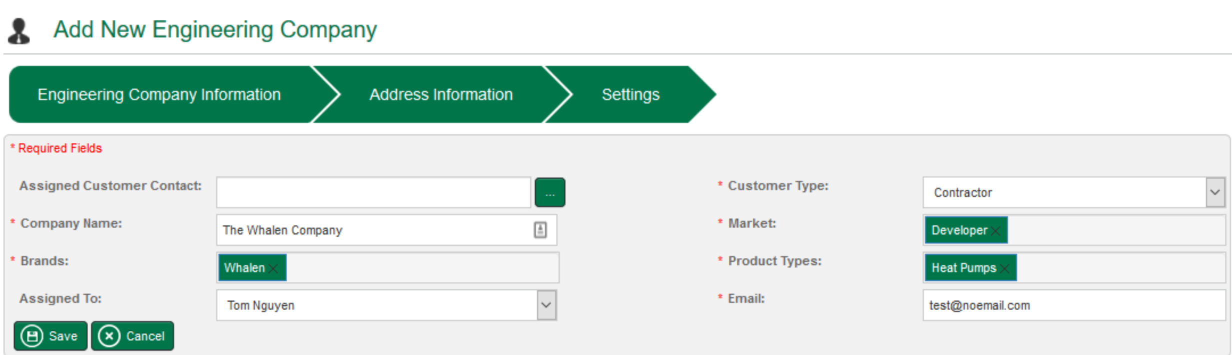
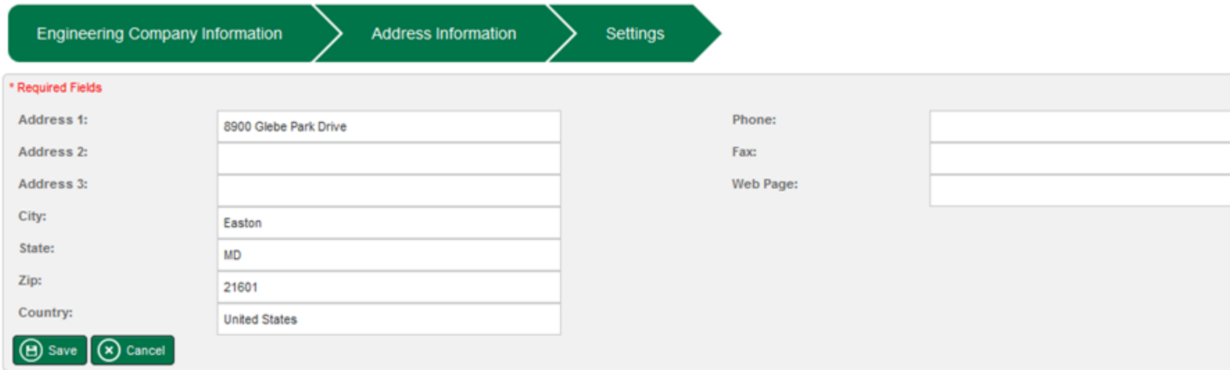
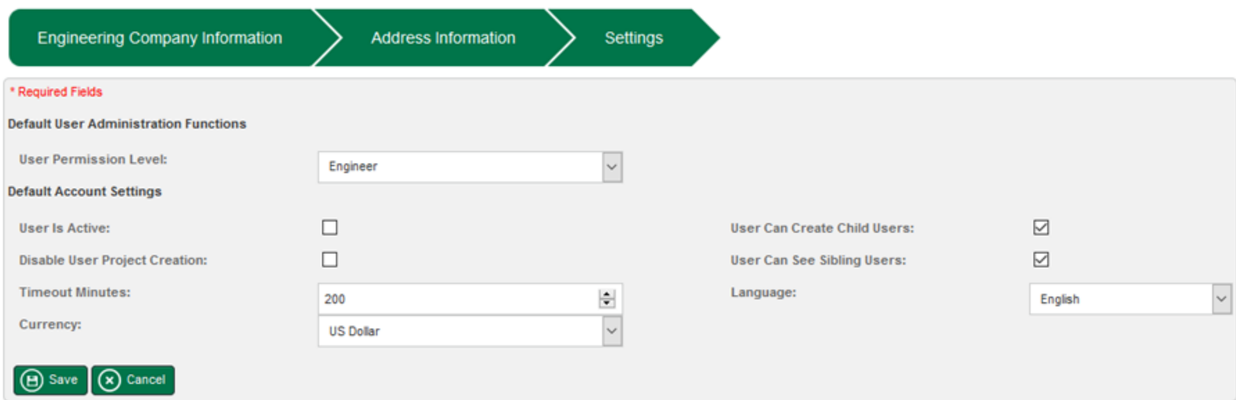


Figure 46 - Adding a new engineering company

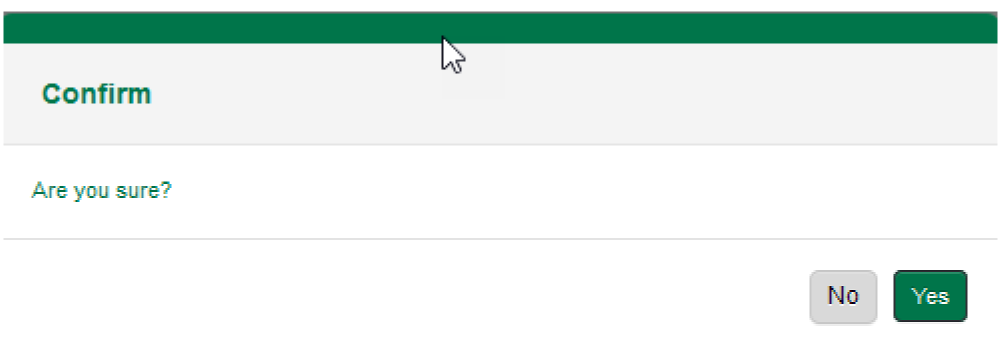
Fill in all the required fields and click the Address Information tab.



When the address information tab is completed, click the Settings tab to navigate to the third and final pane.



When the desired information has been entered, click the Save button. Click the Yes button in the Confirm pop up.



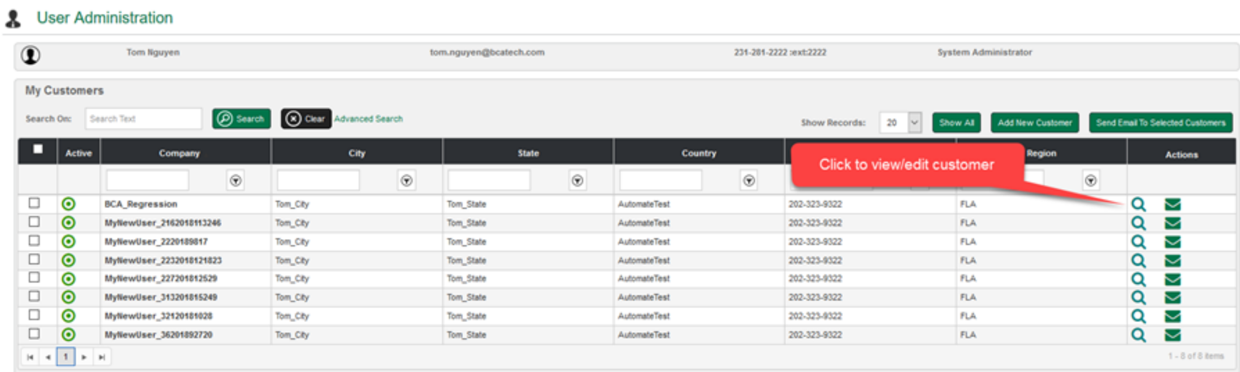
The company will be created and will now appear in the list of companies.

CREATING CUSTOMER USERS

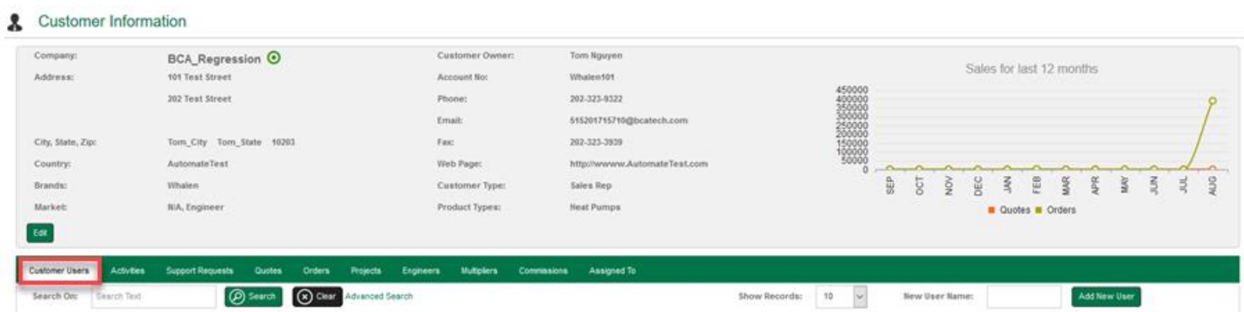
After creating a company, as outlined in the section above, administrators will typically create Customer Users. These users are typically employees of the customer company and will be assigned one of the customer roles or Rep, Rep Admin or Rep Manager.

CREATING A CUSTOMER USER

To create a customer user, navigate to the user administration page from the ADMINISTRATION menu. Locate the customer in the My Customers panel. Once the customer has been located, click the magnifying glass icon in the Actions column.



When the Customer Information page loads several tabs will be displayed. See the figure below for an example of the Customer Information page.

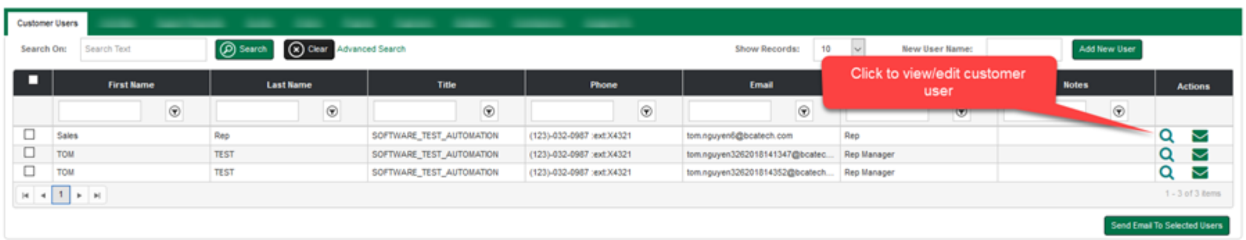


Each tab represents a separate function or set of properties related to the customer selected. For a detailed explanation of each tab click one of the links below.

- Customer Users
- Activities
- Support Requests
- Quotes
- Orders
- Projects
- Engineers
- Multipliers
- Commissions
- Assigned To

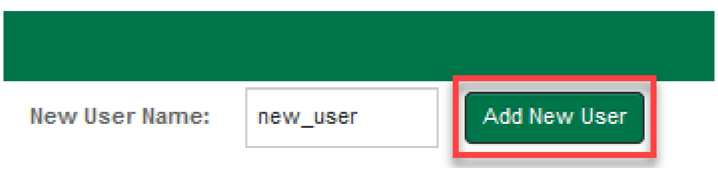
CUSTOMER USERS

The Customer Users tab displays a list of all users that are associated with the Customer. This tab allows the user to view and manage customer users.



CREATE A NEW USER

To create a new user, enter a user name in the New User Name text box and click the "Add New User" button.

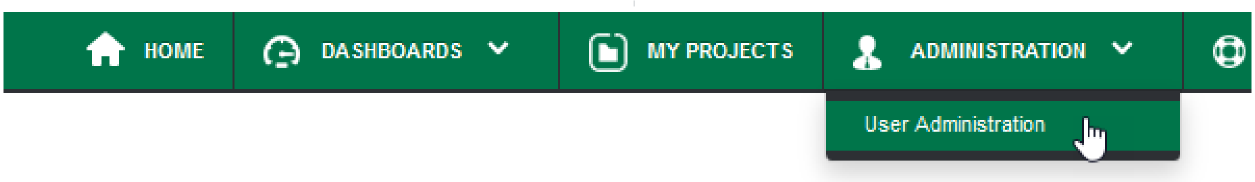


On the Add New User page, fill in the required fields on the General User Information, Settings, and Multipliers tab.

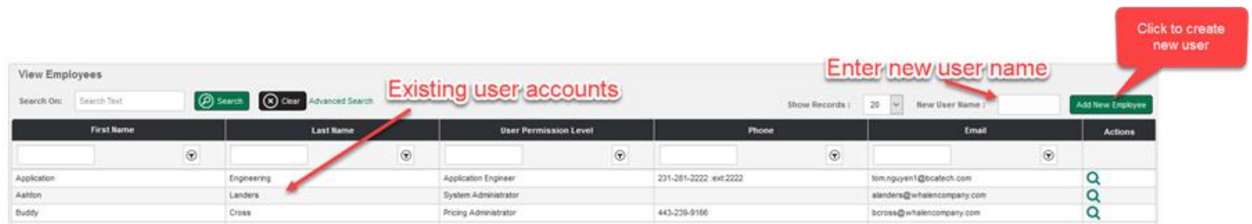
The Multipliers tab is unique to Customer Users.

CREATING EMPLOYEES

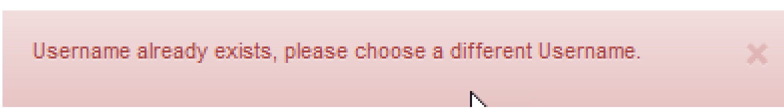
Employees refers to eRep login accounts that belong to the manufacturer company. These users are typically employed by the manufacturer. To create a new employee account, select User Administration from the Administration menu.



Scroll to the bottom panel of the page and enter a user name in the New User Name text box. User names must be between 1 and 150 characters and can include alphanumeric characters A-Z and 0-9. User names are not case-sensitive. For simplicity purposes, user names can be e-mail addresses.

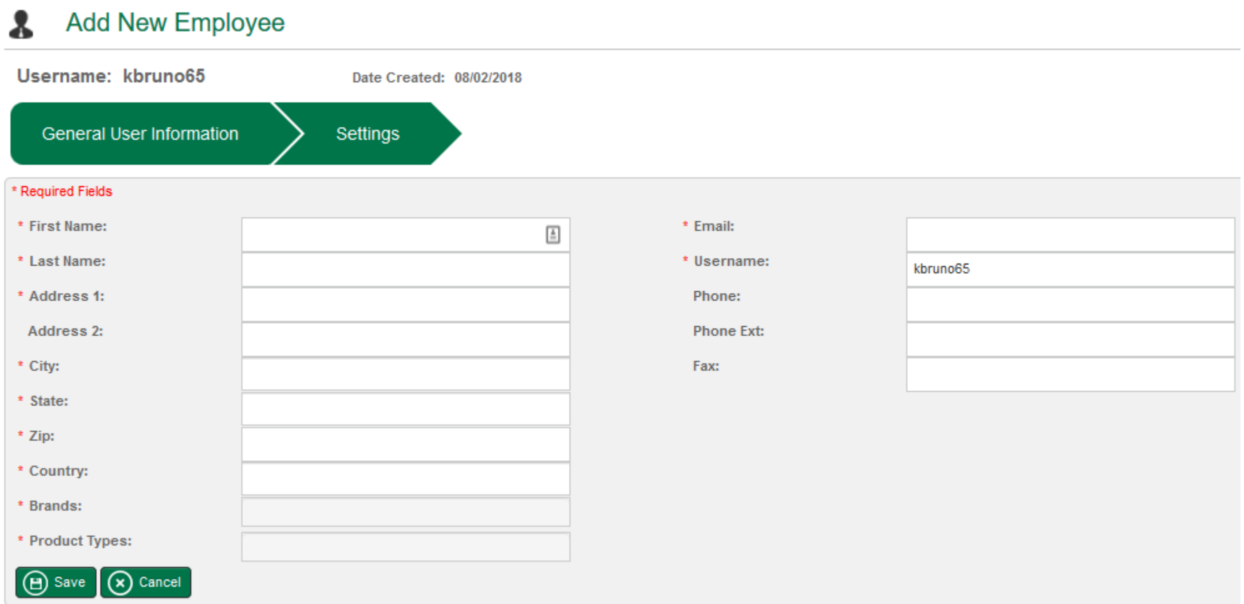


After entering a new user name, click the “Add New Employee” button. If the user name entered belongs to an account that already exists, you will receive the following message.



Select a different user name and try creating the account again.

If the user name is available, the user will be redirected to the Add New Employee page as shown in the figure below.



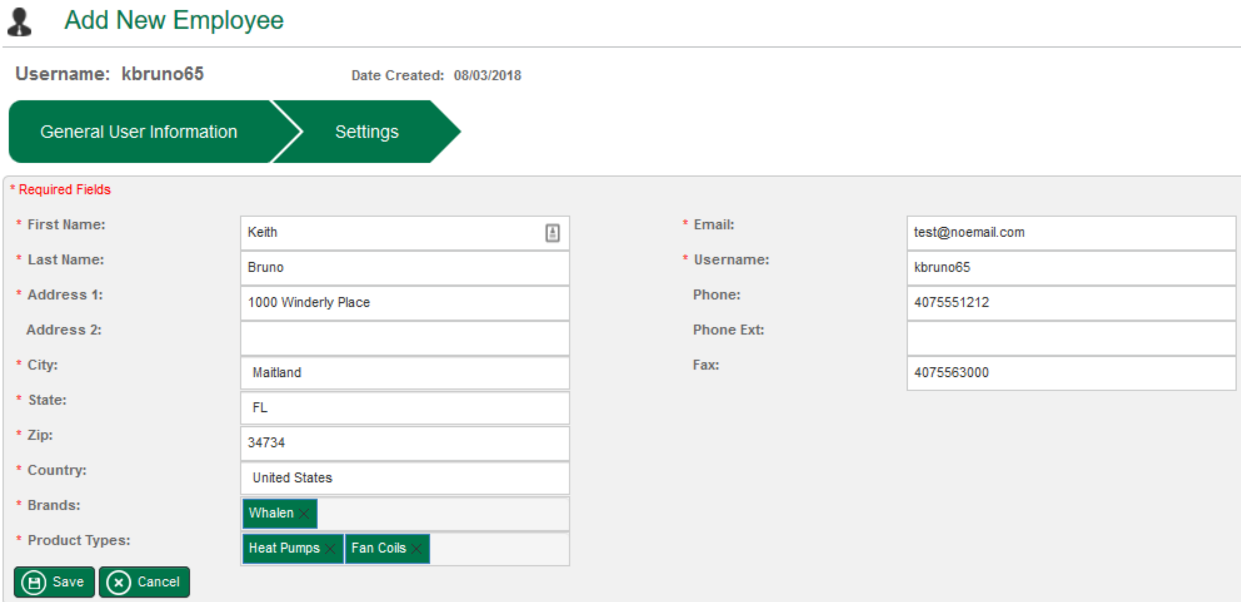
Two tabs are displayed; “General User Information” and “Settings”. Each tab is described in detail in the following sections

GENERAL USER INFORMATION

This tab contains the basic account settings such as e-mail address, physical address, brands and product types.

- First Name – The user account’s first name. Maximum of 150 characters. (required)
- Last Name – The user’s last or family name. Maximum of 150 characters. (required)
- Address 1: - The physical or mailing address of the user. Maximum of 250 characters (required)
- Address 2: - A continuation of the address 1 field. Usually contains supplemental address information such as suite or apartment number. Maximum of 250 characters.
- City – The city or locale of the user. Maximum of 250 characters. (required)
- State – The state or province of the user. Maximum of 150 characters. (required)
- Zip – The zip or postal code of the user. Maximum of 50 characters. (required)
- Country – The country of the user. Maximum of 250 characters. (required)
- Brands – The brands from which the customer can select. Depending upon the company multiple brands may be able to be selected. (required)
- Product Types – Product types that are available to the user. Depending upon the company, multiple product types may be available. (required)
- Email – The e-mail address associated with the user’s account. The account must be a valid e-mail address and in the proper e-mail format (mailbox@domainname.xxx). Maximum of 250 characters. (required)
- Phone – The primary phone number of employee. Maximum of 30 characters.
- Phone Ext – The phone number extension of the employee. Maximum of 30 characters.
- Fax – The fax (facsimile) number of the employee. Maximum of 30 characters.

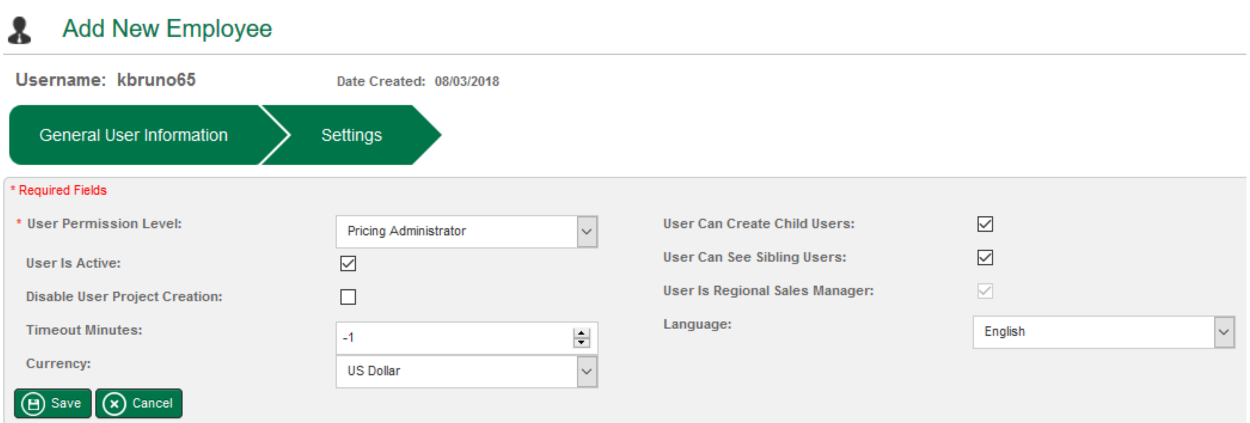
See the figure below for an example of a valid Employee General User Information tab.



SETTINGS TAB

The settings tab contains miscellaneous user settings that control how the user account interacts with the system and controls the privileges that that the user may exercise. The user settings are:

- User Permission Level – Sets the role of the user and controls the privileges that the user may exercise. For more information on User Permission Levels view the help topic “Permission Levels” elsewhere in the user manual.
- User Is Active – If selected, the user may login to the eRep system. If not, the account may not be used to login. NOTE! Even if inactive, the system will retain the user’s quotes, orders, project and other information.
- Disable User Project Creation – If selected, the user will not be able to create new projects. This option is rarely selected but may be useful if the user should be allowed to view projects but not create them.
- Timeout Minutes – Specifies the number of minutes before the user is logged out after no interaction with the eRep system. Defaults to 30 minutes. Must be a positive number. Valid range is: 0 – 2,147,483,647 minutes. (required)
- Currency – Chooses the default currency symbol for the user’s quotes, orders and line items. Choices will vary per system. As an optional feature of the eRep system, it is possible to have the system automatically convert prices between the manufacturer’s default currency and the user’s currency. Please check with your system administrator to see if this feature has been enabled.
- User Can Create Child Users – If selected, the user will be able to create new user accounts under their account. Typically, a function of Rep Managers or other users that need to create user accounts.
- User Can See Sibling Users – If selected, the user will be able to view other user accounts with the same permission level as their account. Typically selected for users that can create child users.
- User Is Regional Sales Manager – If selected, the user will receive special multiplier requests from reps. Users with this attribute are typically in the position of approving price modifications for line items and accessories.
- Language – Sets the default language of the eRep system for the user. Depending upon your system settings, the user may choose between several languages.



PERMISSION LEVELS

By default, the eRep system supports several security or permission levels. The available permission levels depend on the type of user account created.

NON-EMPLOYEE ROLES

- Customer Service – This role allows the user to access quotes and orders submitted by reps as well as search for rep projects to assist reps during the submittal process. This level of permission is reserved for employees and not assigned to representatives.
- Application Engineer – Users assigned this permission level are employees that usually work in the engineering department. Application Engineers typically review special engineering requests submitted by reps that involve unusual modifications to units. They review these modification requests, assign prices to the requests and send them back to the representative with either an approved or disapproved status.
- Order Entry – This permission level is typically assigned to users that review orders submitted by reps and enter order data into the company's manufacturing system.
- Pricing Administrator – Usually assigned to employees that are performing the role of Regional Sales Manager. These users can review quotes and orders as well as approve special multiplier requests.
- System Administrator – Typically assigned to users that need to be able to manage all aspects of the application. Can perform all the functions of the other levels of users. This permission level should be used sparingly and only assigned to users that manage the system.

EMPLOYEE ROLES

- Rep – The most common permission level assigned in the eRep system. Rep level users can typically create projects, select units and add units to quotes and orders. They can request special engineering modifications and submit requests for special multipliers. They can also submit orders for processing.
- Rep Administrator - A Rep Administrator is usually a designated user in each office that can create, modify and delete users for that office.
- Rep Manager - A Rep Manager is usually a designated user in each office that can create, modify and delete users for that office as well as perform rep activities.

SITE MENU

The top user menu is driven exclusively by permission which are currently mapped to a role. Below is a matrix that represents the role and the top menu that each role has access to.

	Top Menu						
Role	**Home**	**Dashboards**	**My Projects**	**Parts**	**Administration**	**Support**	**Mfg. Tools**
System Administration	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Sales Manager	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Application Engineer	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Customer Service	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Rep Manager	Yes	Yes	Yes	Yes	Yes	Yes	No
Rep Admin	Yes	Yes	Yes	Yes	Yes	Yes	No
Sales Rep	Yes	Yes	Yes	Yes	Yes	Yes	No
Engineer	Yes	Yes	Yes	No	Yes	No	No

While it is possible to add users to permissions to view this additional links, this would be best accomplished by adding a new role that contains the desired permissions and then allow the user to inherit the permissions from one of the given roles.

Below is a matrix that represents the role and permission that maps to that role.

	Role							
Permission	**System Administrator**	**Pricing Administrator**	**Customer Service**	**Application Engineer**	**Rep Manager**	**Rep Admin**	**Rep**	**Engineer**
Create Project	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
Delete Project	Yes	No	No	No	No	No	No	No
Restore Project	Yes	No	No	No	No	No	No	No
Create Quote/Order	Yes	Yes	Yes	Yes	Yes	No	Yes	No
Delete Quote/Order	Yes	Yes	Yes	Yes	No	No	No	No
Manage User Requests	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Approve Multiplier Request	Yes	Yes	No	No	No	No	No	No
Regional Sales Manager	No	No	No	No	No	No	No	No
Create Submittal	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
Approve Orders	Yes	No	No	Yes	No	No	No	No
Finalize Orders	Yes	No	Yes	No	No	No	No	No
Can Create Users (may be overridden)	Yes	No	No	No	No	No	No	No
Can See Sibling (may be overridden)	Yes	No	No	No	No	No	No	No
Can't Create Project (may be overridden)	No	No	No	No	No	No	No	No
User is Regional Sales Manager	No	No	No	No	No	No	No	No

(override if set)								

As previously mentioned, the role system can inherit permission, so you can create new roles and then map them to existing roles to generate the desired permissions. The User is regional sales manager, Can't Create project, Can Create user, Can Create Siblings permissions can be assigned to any user during user administration. You can also provide the Can Create Orders and Can Create Project Override permissions if you would like to grant permission to a Role that does not currently do so by default.

CREATING A PROJECT

The first step in using the Whalen Integrated Sales Center Software is to create a project. To view a list of your projects, click on the MY PROJECTS menu at the top of the menu bar as shown in the figure below.

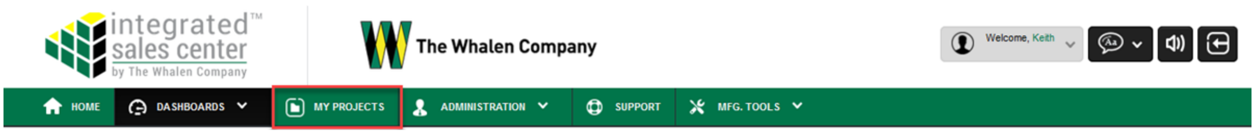


Figure 47 - Creating a project

You will be redirected to the My Projects page where the system will display a list of active projects. To create a new project, enter a project name in the New Project Name text box and click the Add New button. See the figure below for an example.

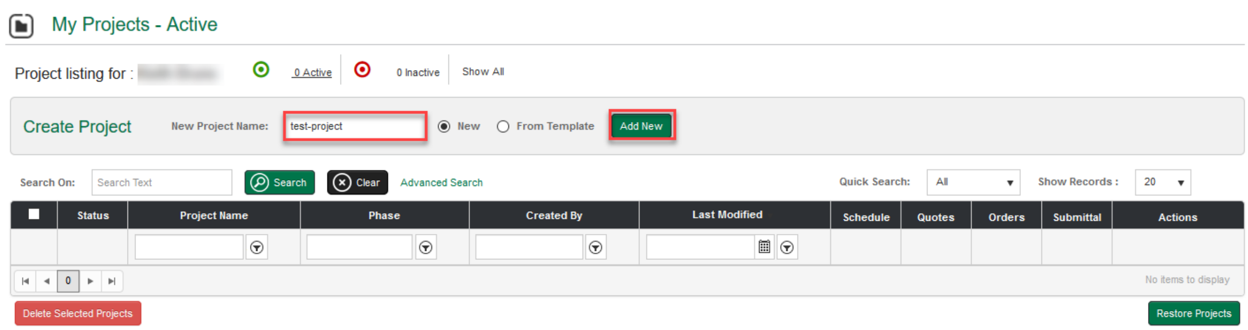


Figure 48 - Project creation

When the new project is created, you will be redirected to the Project Information page which allows you to set properties and basic information about the project.

Items with a red * are required to be filled out to save the project. See the figure below.

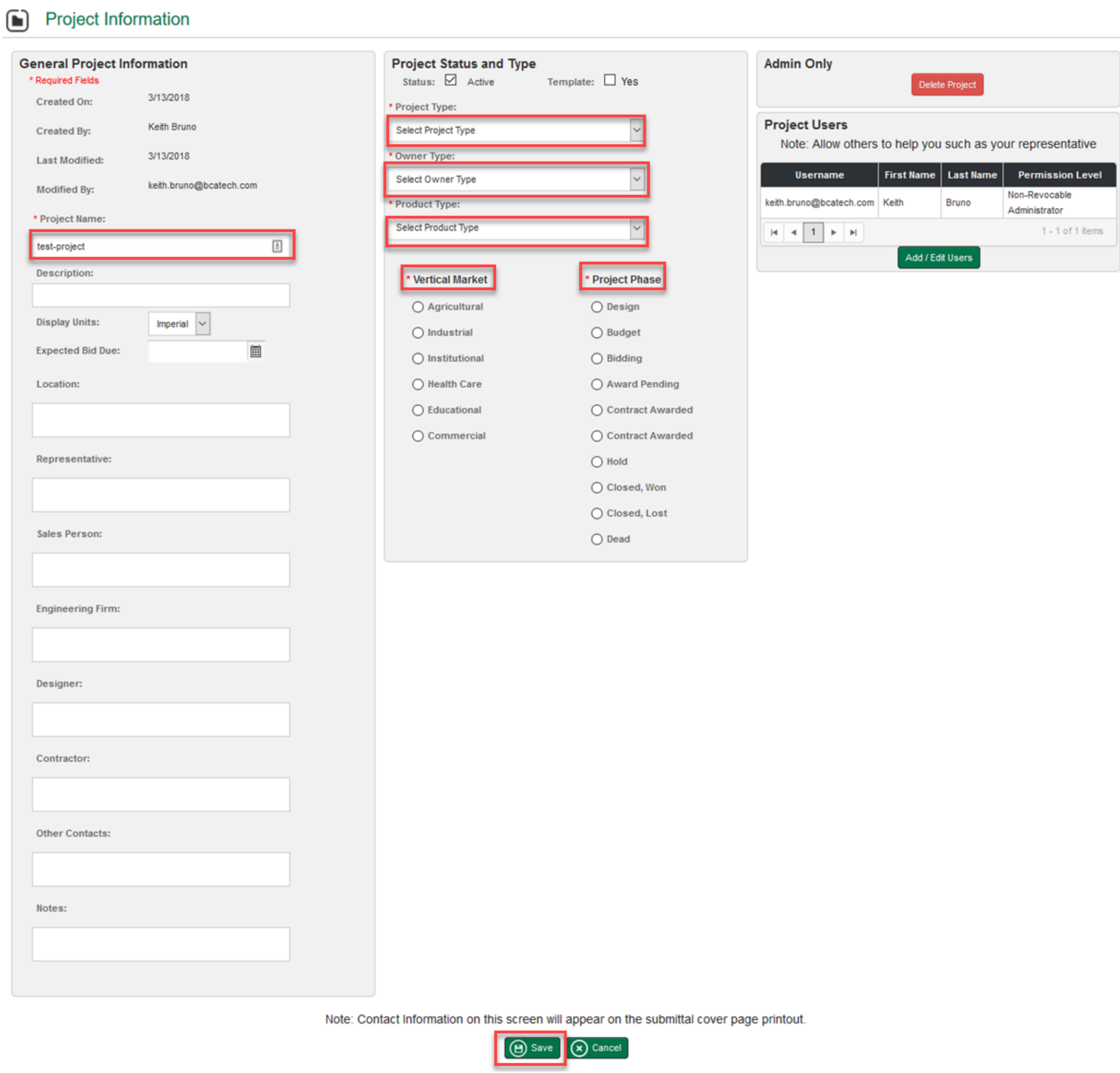


Figure 49 - Updating project details

Click the Save button to save the project information. You will be returned to the Project Schedule page.

PRICE A UNIT

The next step in the process is to select and price a unit. This refers to the process of picking a product, selecting attributes related to the product, and adding it to a schedule.

To add a unit from the Project Schedule page, select the Product Family, Product Category, model and optionally, a quantity from the Project Schedule page as shown in the figure below.

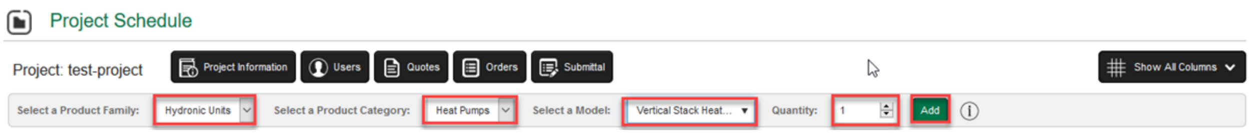


Figure 50 – Pricing a unit

Click the Add button.

The product selected will be added to the Project Schedule grid as shown and the user will be redirected to the Pricing page.

The information displayed on this page will be specific for the type of product you selected. In this example a Vertical Stack Heat Pump was selected.

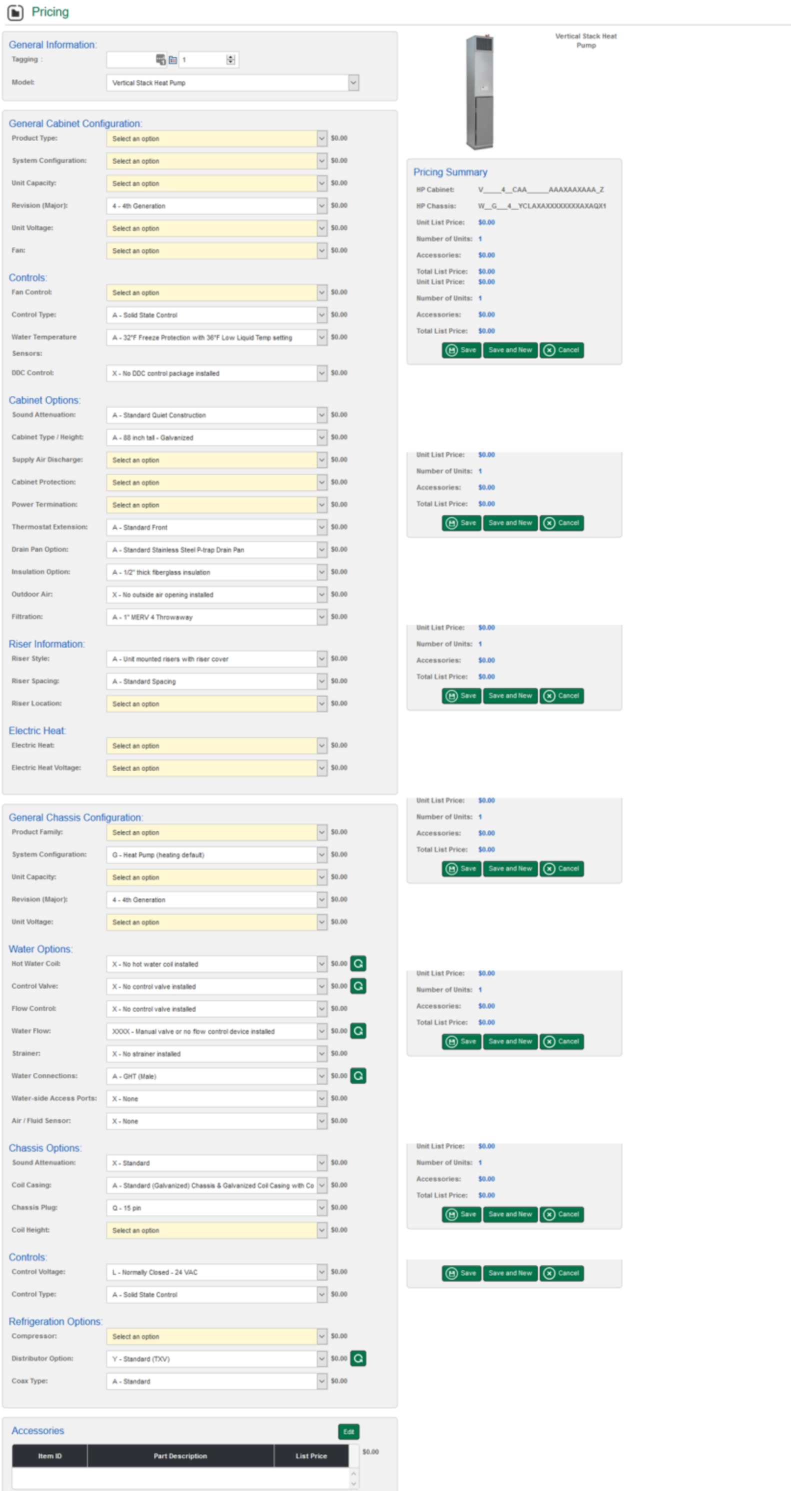


Figure 51 - Pricing a unit

The options shown will depend on the unit selected. Required options are displayed with a yellow background

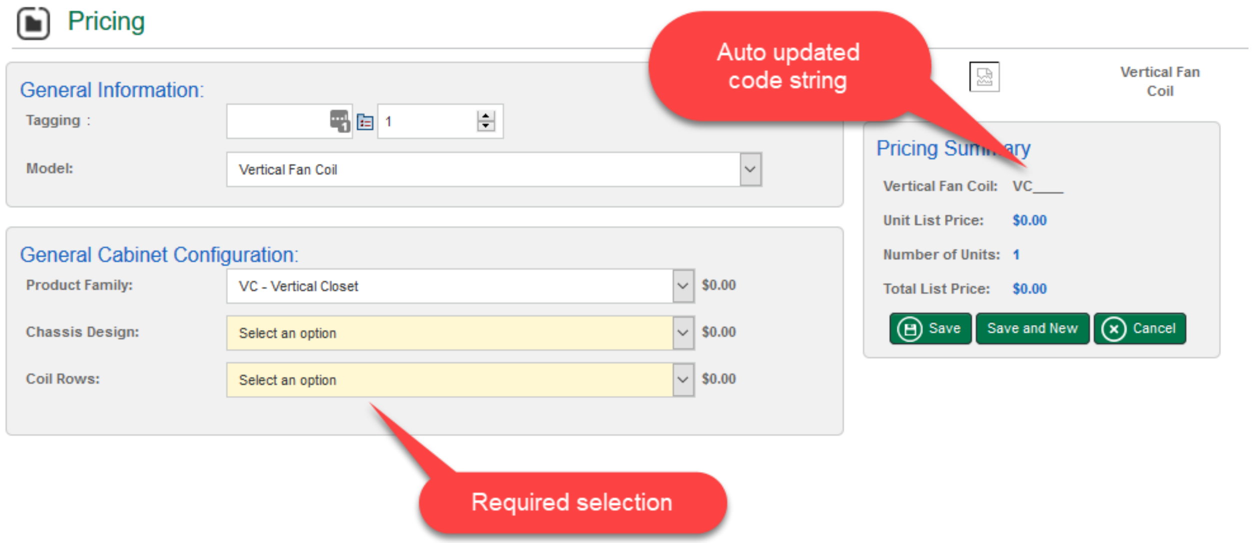


Figure 52 - Adjusting pricing options

From here you may enter tagging information, select product options and make changes to the product specifications. The page will dynamically update the Pricing Summary section when any changes are made.

The system also updates the Model code dynamically to create the correct order string code that corresponds to the model with the options selected.

From the pricing page, it may be possible to add accessories to the line item by clicking the Edit button in the Accessories panel (if available). The system will display a list of accessories that correspond to the type of item selected.

Select the accessories desired by clicking the plus sign next to the accessory shown. The accessory will be added to the bottom of the Accessories pop up. If you wish to delete an accessory, click the minus sign next to the accessory.

Click the Save button to save your changes and return to the Project Schedule page.

The system will save the unit that you selected and return you to the Project Schedule page. If you need to change options or reprice the unit click the $ icon next to the item you wish to modify.

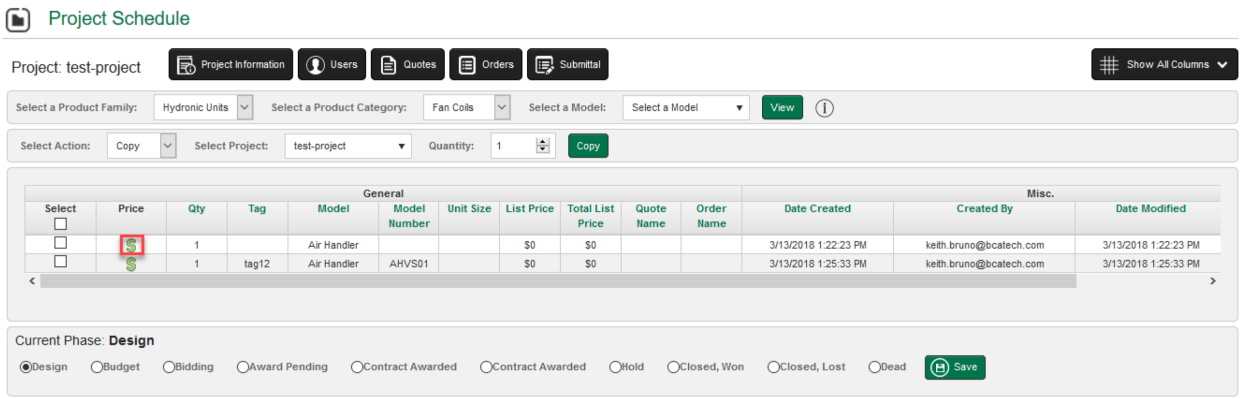


Figure 53 - Viewing possible selections

A unit must be priced prior to adding it to a quote or order.

CREATING A QUOTE

Creating a quote is the process of adding priced line items to a quote. Any number of items may be added to a quote and eventually converted to an order after customer approval.

To add line items to a quote from the Project Schedule page, select the line item from the grid by clicking the check box next to the line item and select the Quote item from the Select Action drop down list box as shown in the figure below.

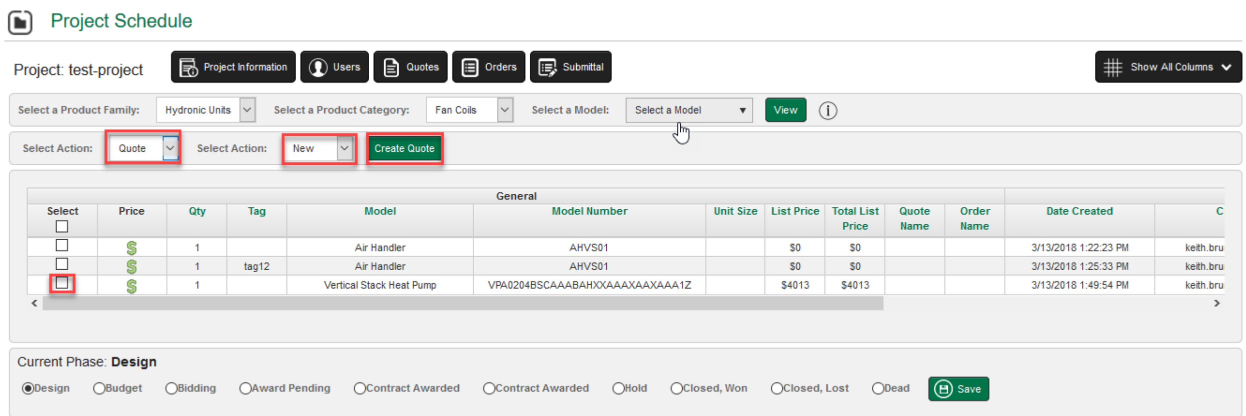


Figure 54 - Creating a quote

Line items can only be added to quote if they are not associated with another quote or order.

At this point, a new quote will be created with the line items selected from the Project Schedule. You will be redirected to the quote. The quote page will look similar to the following figure.

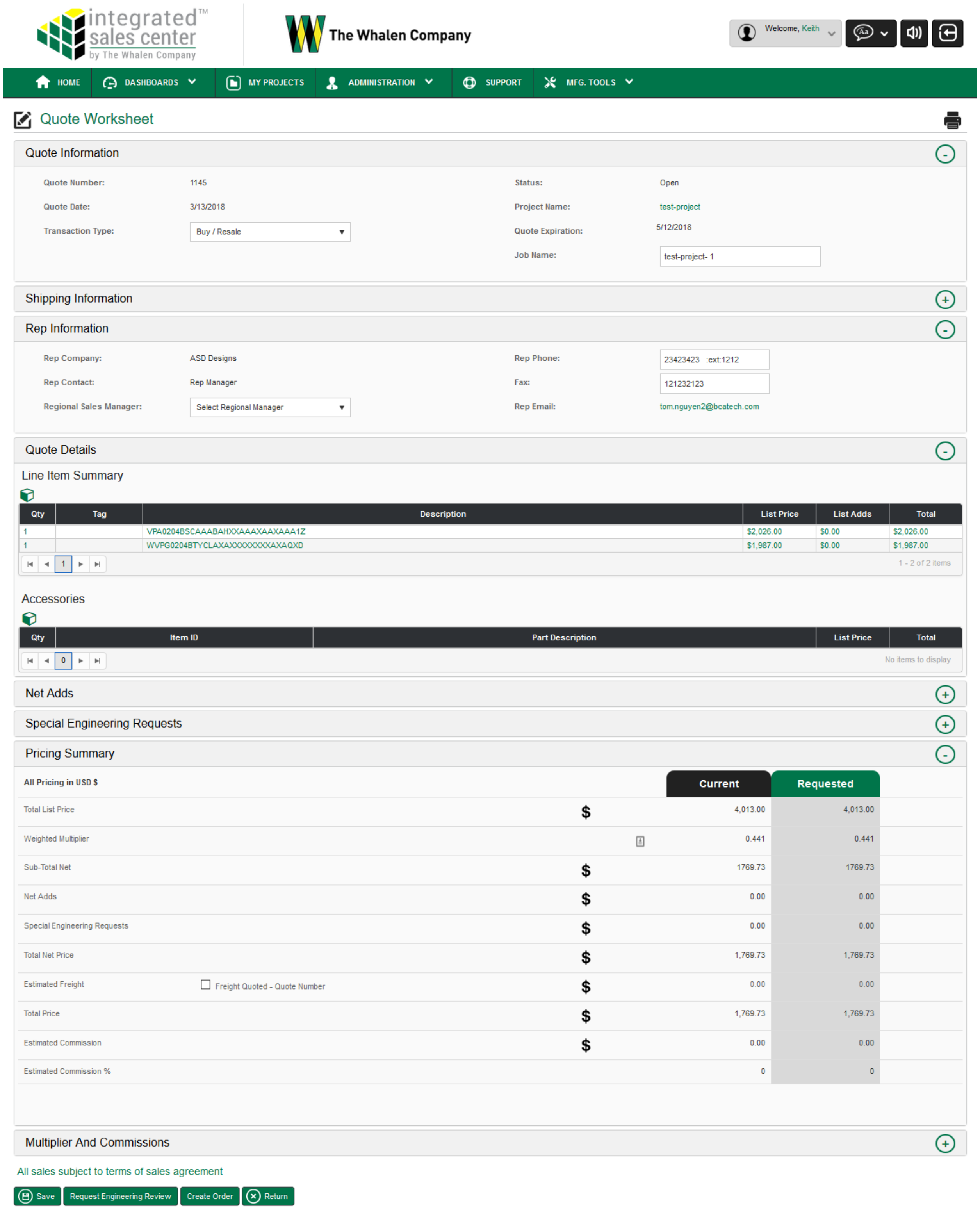


Figure 55 - New Quote

The Quote page is divided into several sections and each section is collapsible to allow the quote to fit on smaller screen devices.

Figure 56 - Collapsing and expanding quote sections

To collapse a quote section, click the minus sign at the far right of the section header as shown in the figure above. Each section of the quote allows the user to specify the particulars for the quote and controls how the quote will be applied or allows the user to configure specific options for the quote.

Once the quote is configured as desired, click the Save button at the bottom of the quote page to save the quote and return to the Project Schedule page. If you wish to convert the quote to an order which may be submitted to the factory click the Create Order button. If the quote requires review by the engineering department, click the Request Engineering Review button. This option is explained in more detail in the Orders section.

Figure 57 - Saving a quote

If you click the Create Order button you will be prompted to confirm the creation of a new order as shown below. Converting a quote to an order is a one-time process and you will not be able to make modifications to the quote after it has been converted to an order.

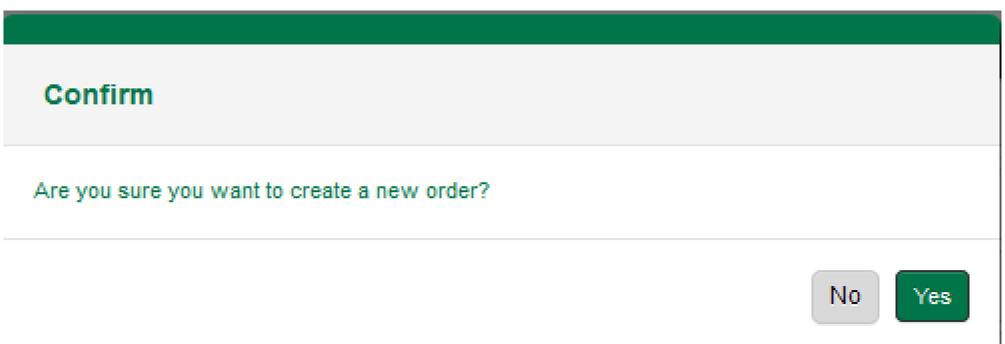


Figure 58 - Converting a quote to an order

Click the Yes button to convert the quote to an order.

ORDERS

Once a quote has been converted to an order, you will be redirected to the Order Worksheet page. The Order Worksheet page is similar to the Quote page and has many features and properties in common. Orders may be submitted to the factory, whereas Quotes may not.

An Order is usually the last document created in the project process and should be thought of as the final document in the project creation process.

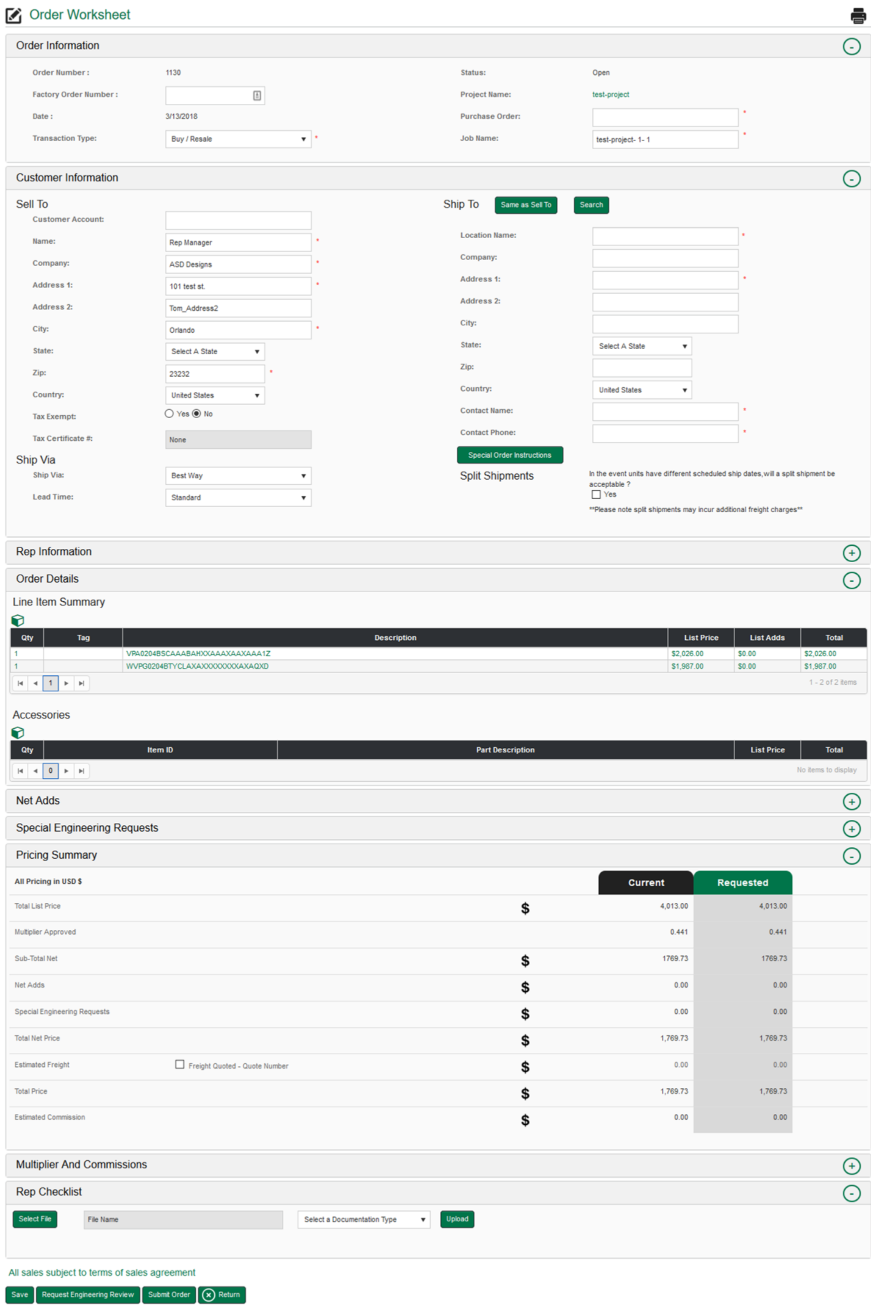


Figure 59 - New Quote Page

Orders have more sections than quotes and allow the user to specify additional options that are related to the customer or location where the order is to be shipped.

Once the order properties have been set, click the Submit Order button to submit your order to the factory for processing. You will be asked to confirm the submittal process. Click the Yes button to submit your order to the factory for processing.

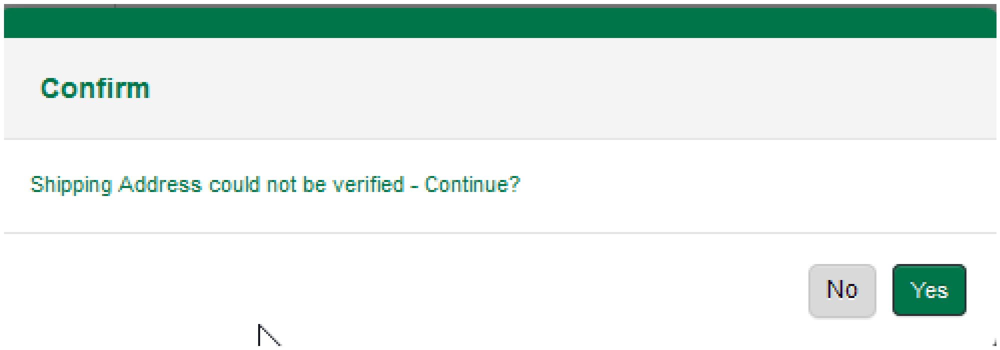


Figure 60 - Submitting an order

Users may also submit their orders to the factory engineering department for review prior to submitting the order to the factory for processing. To have the engineering department review your order, click the Request Engineering Review button at the bottom of the order page. A pop up message will be displayed which will allow you to enter a message that will be forwarded along with your request for review to the engineering department.

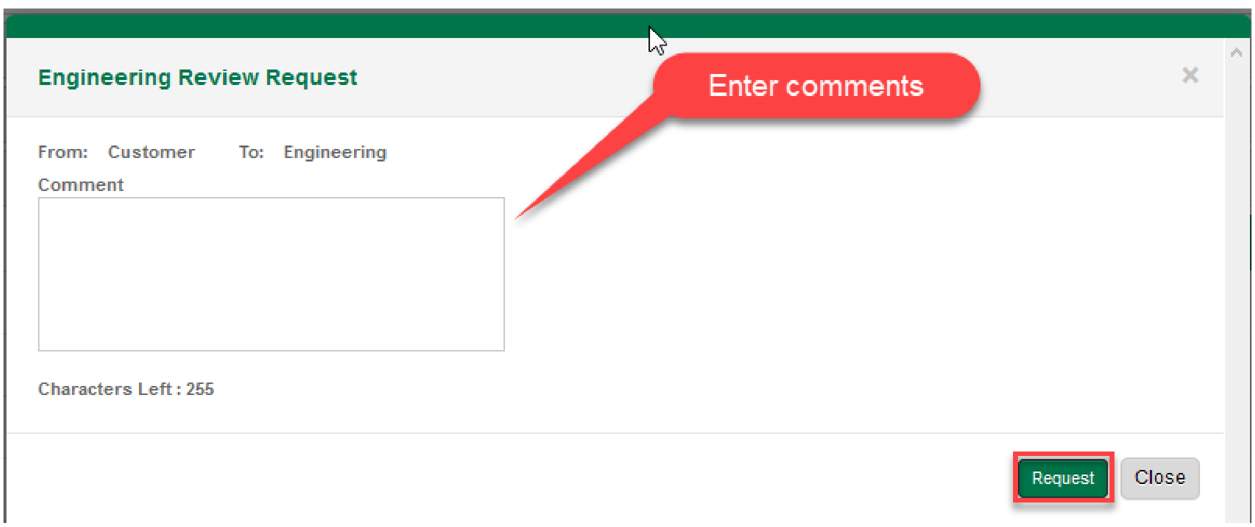


Figure 61 - Sending an order to the factory engineering department for review

Once your request has been reviewed, the engineering department will send the order back to you. An e-mail message will be sent letting you know the request has been reviewed.

SUBMITTALS

A submittal is a set of documents that you may print or export that contains documents related to all the items you specify in your project.

To create a submittal, select all of the items you wish to include in your submittal package from the project schedule and click the Submittal button from the My Projects page as shown below.

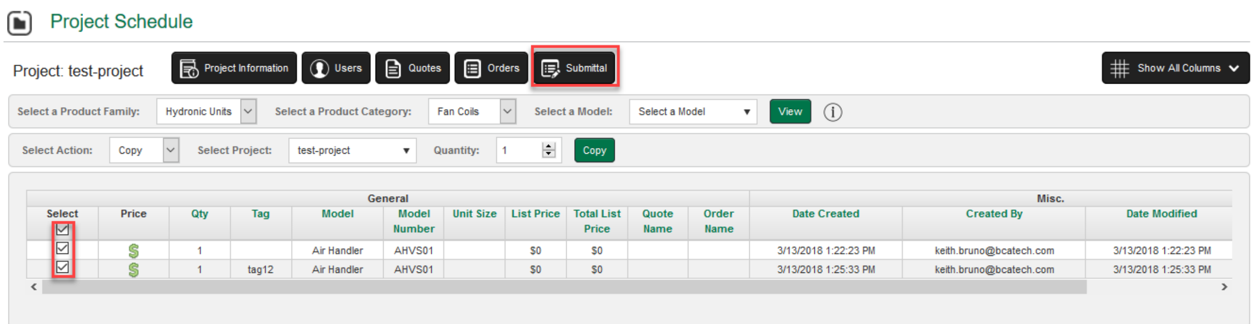


Figure 62 - Generating a submittal document set

Once you are redirected to the Submittal Generator page, select the product family from the Product Family drop down list box and select the options you wish to create for the submittal package. Common options include Unit features & options, Schedule, Unit performance, Unit drawings and others. Select the options you wish to include in your package and click the Generate Submittal button.

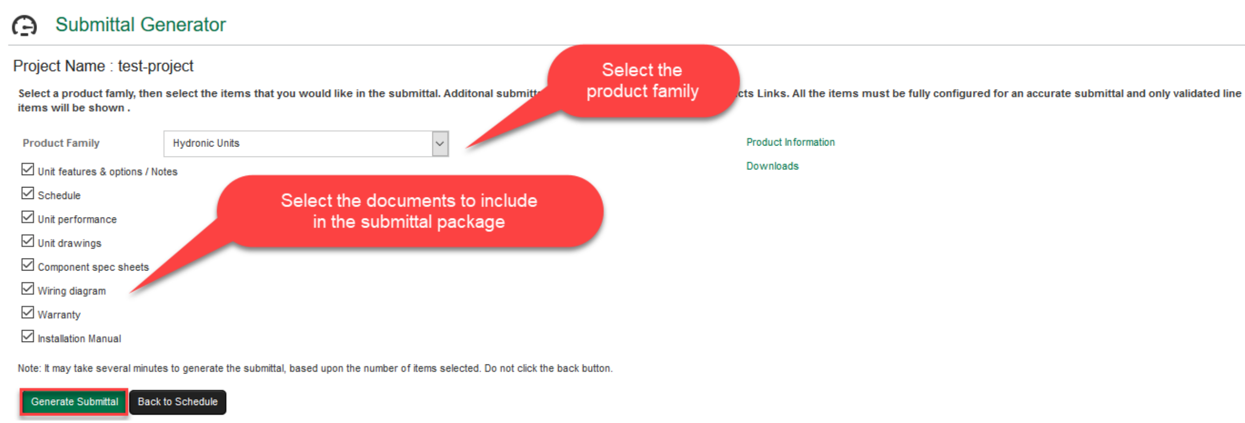
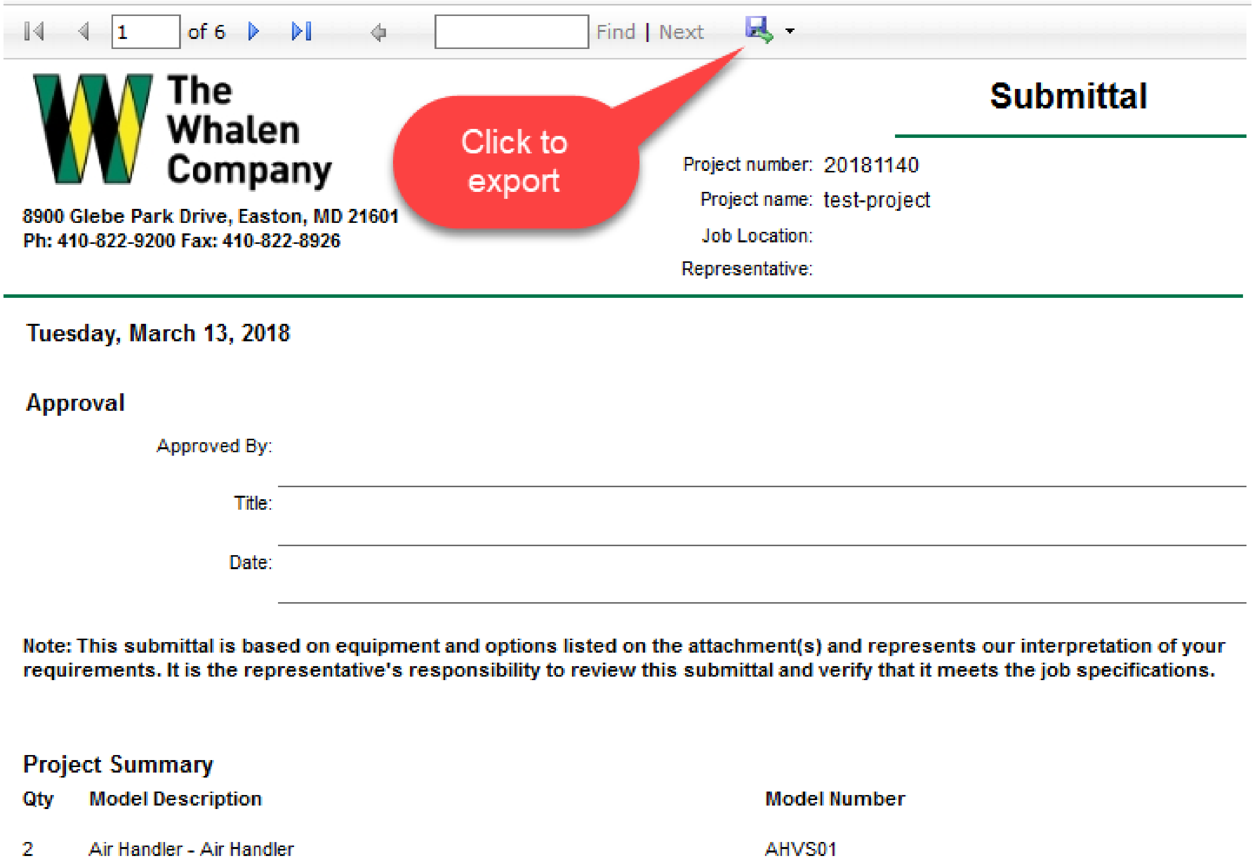


Figure 63 - Generating a submittal package

The submittal package will be created.

You may save the package to your local computer by clicking the Export button at the top of the page.



The Whalen Company

8900 Glebe Park Drive, Easton, MD 21601
Ph: 410-822-9200 Fax: 410-822-8926

Submittal

Project number: 20181140
Project name: test-project
Job Location:
Representative:

Tuesday, March 13, 2018

Approval

Approved By: ______________________

Title: ______________________

Date: ______________________

Note: This submittal is based on equipment and options listed on the attachment(s) and represents our interpretation of your requirements. It is the representative's responsibility to review this submittal and verify that it meets the job specifications.

Project Summary

Qty	Model Description	Model Number
2	Air Handler - Air Handler	AHVS01

Figure 64 - Sample submittal package

PROJECT INFORMATION

PROJECT SCHEDULE

SEARCHING

SUMMARY

This document provided basic information on the use of the Whalen Integrated Sales Center software. It reviewed the project creation, line item pricing, quoting, ordering process and submittal document creation process.