

Manufacturing X Sales Platform

RELEASE NOTES **20** KEY FEATURES & ENHANCEMENTS **02**



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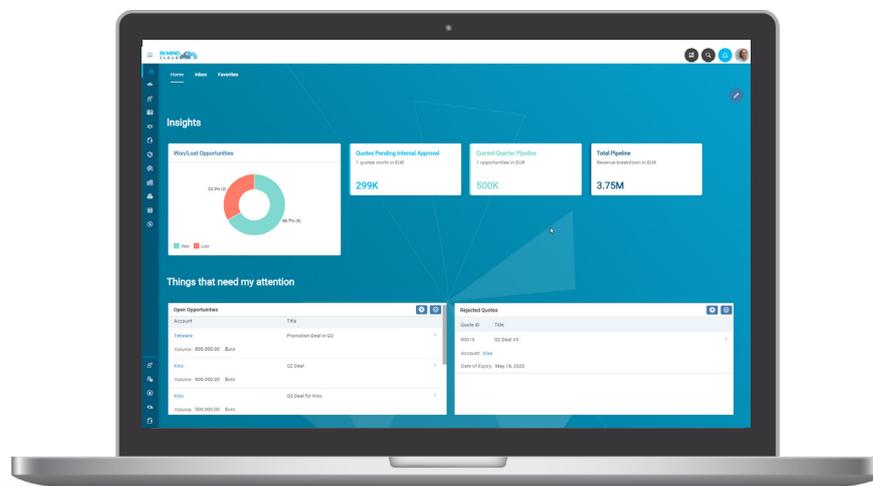
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Introduction

With the 20/02 release of the Manufacturing X Sales Platform, In Mind Cloud focuses on state-of-the-art usability of the system to maximize the value of existing features for our customers. Numerous features, e.g. Home Page, Account Overview and Opportunity Pipeline View have been re-designed to enhance usability and efficiency.

To serve our manufacturing customers better, we have introduced a new task management capability to quickly create and distribute tasks, linking them to complex sales cycles in opportunities or when managing quotes for manufacturing-as-a-service.

In Mind Cloud further enhanced its CRM and CPQ processes. Examples are newly introduced visibility rules around accounts and contacts, editing sales text at item level, updating prices on change of additional pricing relevant fields etc.



1. Activity Management

In a sales-driven process, activity management is a central component to track each customer interaction and schedule upcoming activities that help a sales rep move a customer through the funnel. Highly productive and successful sales reps understand the importance of a properly defined activity management process, as it helps them to better understand a customer’s interaction history, collaborate with their colleagues more efficiently and stay on top of important deadlines pertaining to a sales cycle. At the same time, Sales Managers gain important insights which can be used to further improve the sales process, coach other or onboard new sales reps. Just imagine your best sales rep leaving on one day over the other, and you need to enable a smooth handover.

Here at In Mind Cloud, we have made it a priority to bring powerful activity management capabilities to the manufacturing industry.

We are introducing a new activity type ‘Task’. A task can be a certain activity that needs to be carried out in order to further progress the sales cycle and basically comprises of a task description, a status and priority, a date or date range as to when this task is going to get executed, as well as a responsible for completing the task. The following figure represents a task object:

The screenshot displays the In Mind Cloud interface for an account named 'Kixo (Active)'. The main view shows a table of tasks with columns for Status, Due Date, Reference, Task Name, Start Date, Last Updated, and Priority. A task is selected, and a detailed view is shown over it. The detailed view includes fields for Task Name, Assignee(s), Account, Related To, Owner, Start Date & Due Date, Priority, Status, Completion (%), and Description.

Status	Due Date	Reference	Task Name	Start Date	Last Updated	Priority
✓	Feb 19, 2020	Festival Promotion Deal	Identify decision makers from Initial contact, and more details on purchase decisions which can be in our favor	Feb 12, 2020	Feb 26, 2020	🔴
⚠️	Feb 20, 2020	Q3 Deal for Kixo	Develop Value Proposition - Stating with the product define which configuration, options and features fit well with customer needs	Feb 10, 2020	Feb 26, 2020	🟩
🟡	Feb 21, 2020	Q3 Deal for Kixo	Quotation Discussions - beyond Configuration and pricing, identify essential to making them happy and satisfied at the conclusion of business	Feb 18, 2020	Feb 26, 2020	
🟢	Feb 27, 2020	Q3 Deal for Kixo	Configuration Discussions - review all the options and key questions, as well identify any latent need.	Feb 20, 2020	Feb 26, 2020	
🟢	Feb 27, 2020	Q3 Deal for Kixo	Pricing Discussions - discuss optional prices available through different quality levels. payment plans or transaction types.			
🟡	Apr 10, 2020	Q4 Proposal	Send proposal			
🔴	Apr 24, 2020	Q2 Deal	Identify Key decision makers			

Task Object Details:

- Task Name:** Develop Value Proposition - Stating with the product define which configuration, options and features fit well with customer needs
- Assignee(s):** [User Avatars]
- Account:** Kixo
- Related To:** Q3 Deal for Kixo
- Owner:** rep (Sarah Hong - Rep)
- Start Date & Due Date:** Feb 10, 2020 - Feb 20, 2020
- Priority:** 3 - Low
- Status:** 30 - At Risk
- Completion (%):** 0
- Description:** Step 1: Identify Customer Needs
Ask yourself: What does my target customer need or want that my company has that no one else if offering?

Figure 1: Task Object

If a task is created in direct relation to an opportunity or a quote, the user can reference this task accordingly. Similarly, it can be referenced to an account. This immediately helps for example a sales team that is jointly working on an opportunity to understand the various activities that have been carried out already, or that are scheduled to get executed in the future.

2. Insights

As part of our strategic investment into a state-of-the-art user experience of Manufacturing X, as well as delivering sales effectiveness capabilities, we have set out to deliver a new concept of a homepage as well as overview pages. Both allow end users to instantly obtain and digest critical information, e.g. about the pipeline, specific deals or sales KPIs and enable them to initiate appropriate action instantly.

Homepage

With this release we deliver an entirely redesigned homepage. After a sales rep logs on they will be prompted with the most critical information and KPIs to manage day-to-day operations:

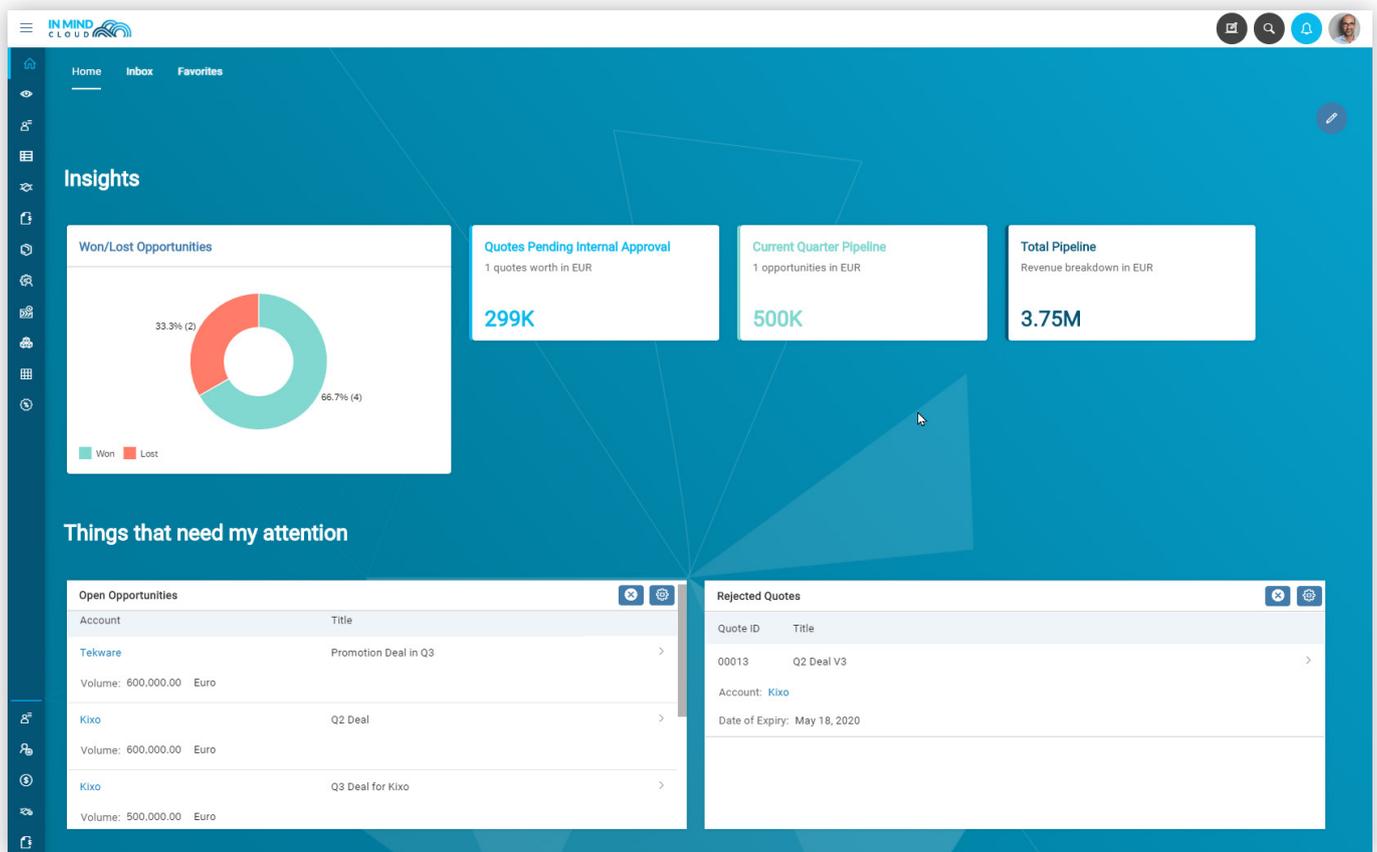


Figure 2: Newly Designed Homepage

You will notice the new color theme of the navigation bar and background image.

Administrators can configure 1) sections and 2) widgets. A section allows an administrator to logically group widgets together. In the above figure, the section 'Insights' combines new tile widgets that can be turned on through configuration. The tiles available with release 20/02 are:

- Quote Volume by Status (aggregating the volume of quotes of a particular status; in this example the status is 'Pending Internal Approval').
- Current Quarter Pipeline (total volume of active opportunities that are expected to close within the current quarter).
- Total Pipeline (active opportunities that are neither lost nor won).
- Won/Lost Opportunities (comparing the % split between opportunities that are won or lost).

The homepage also occupies existing table widgets that have been delivered as part of a previous release.

When clicking on these tiles, the user is taken to context specific navigation targets. While both tiles, 'Quote Volume by Status' and 'Current Quarter Pipeline' take the user to a filtered list of quotes and opportunities respectively, the 'Total Pipeline' tile navigates to the 'Opportunities Pipeline' view which has received a makeover as well:

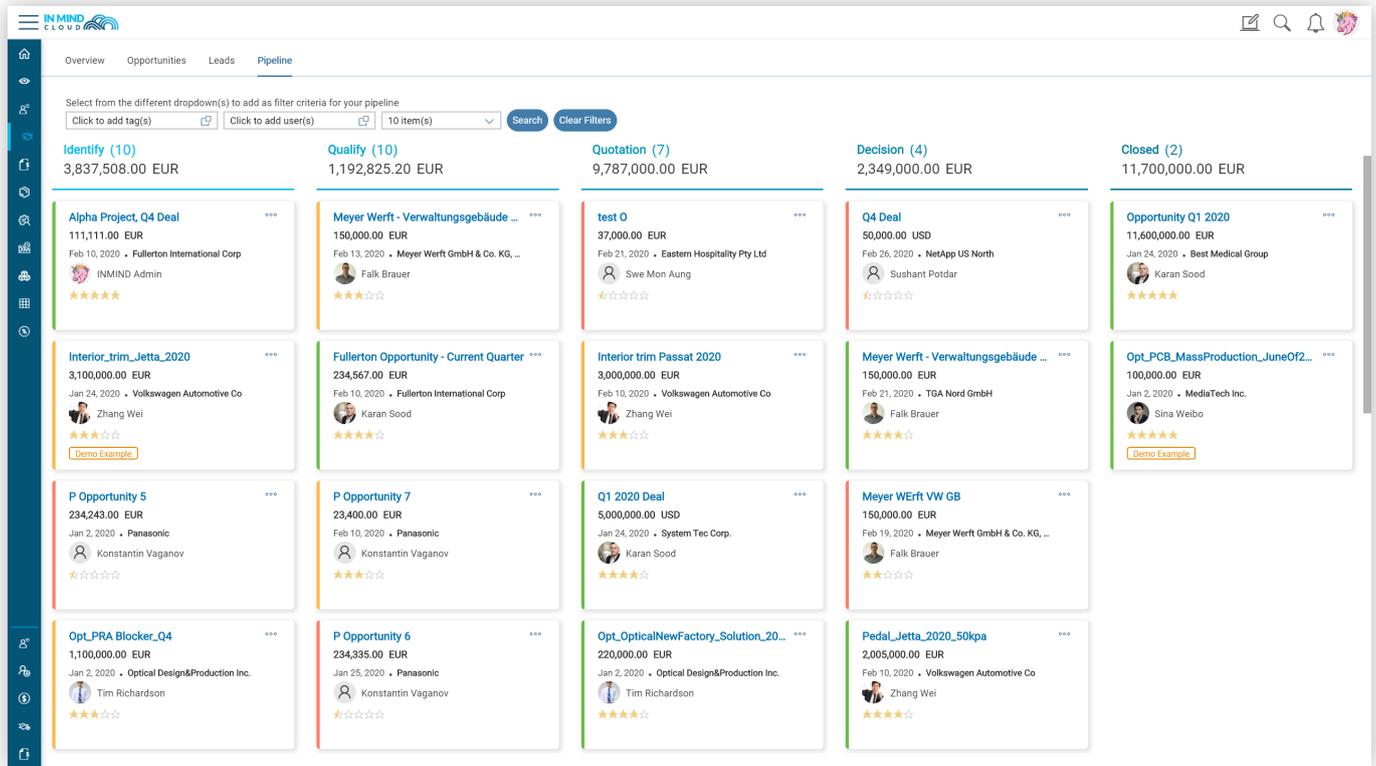


Figure 3: Newly Designed Opportunity Pipeline View

On this view, we have delivered the following enhancements which are available after upgrading:

- Entirely redesigned card layout
- User avatars to represent the opportunity's owner
- Added field 'Chance of Success'
- Color coding based on 'Chance of Success'

Account Overview

While a CRM solution captures critical information, sometimes it may be overwhelming for a user to find the right information easily. To instantly obtain a snapshot of where an account stands from a pipeline perspective, who the respective contacts are, what quotes are being worked on, etc. Manufacturing X will deliver a new page called 'Account Overview':

Figure 4: Account Overview Page

When turned on via the administration the tab 'Overview' will become available on the account object. As part of release 20/02, the following 5 widgets are being made available:

- Open Quotes (sorted by last updated date)
- Sales Team (from Role /Function)
- Contacts (with ability to call mobile and send e-mail using default apps on desktop)
- Pipeline Information (for next 3 months, and total pipeline)
- Upcoming Tasks (sorted by last updated date)

The account overview page helps users who are not familiar with the account, to obtain an instant summary.

3. Standardized Account Access for Direct and Distribution Sales

Account information is quite sensitive. A sales representative should only see customers that they are allowed to. This is even more important for distribution and partner sales. With this release, In Mind Cloud further extends the capability of the existing access rights concept and introduces a set of comprehensive pre-defined rules to cater to account & contact visibility rules.

With this feature, Manufacturing X delivers below additional benefits:

- ✓ Easily control territory access for direct sales
- ✓ Easily manage distributor access to customer information
- ✓ Enable admin to setup various rules to cater for more complex business scenarios

Users can be granted access to an account if:

- ✓ User is its creator, owner or assigned to account team
- ✓ User needs access to accounts managed by others in this Org Unit hierarchy (e.g. managers)
- ✓ User can also be granted access to orphaned accounts, an edge case when accounts are brought in via technical integration without creator
- ✓ Contact visibility can be restricted based on account

Name	ERP Id	Active	Prospect	Industry	Country	City	Owner
Best Medical Group		✓	🔗	Medical Equipment		New Earth	Medicci Soluman
Construction & Mining LTE	1000	✓	🔗	Packaging	Singapore	Singapore	Amy Hunter
Distribution Offices Ptd Lte	1000	✓	🔗	Packaging	China	Shanghai	INMIND Admin
Madison County Fire Department, TN, USA, 00083 (Open)		✓	🔗	Public administration	United Kingdom	Derbyshire	Jaime Haze
MediaTech Inc.		✓	🔗	Information	China	Shenzhen/深圳	Sina Weibo
Optical Design & Production Inc.	1000	✓	🔗	Manufacturing	Singapore	Singapore	Tim Richardson



First Name	Last Name	Phone	E-Mail	Account
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Figure 5: Standardized Account Access for Direct and Distribution Sales

4. General Purpose Scripting Interface for Configuration

With the release 20/02 Manufacturing X comes with a general-purpose scripting interface for product configuration, enhancing the existing scripting via capabilities of the domain specific language. This general-purpose programming interface allows to connect external APIs to validate the configuration, to use external dimensioning APIs or to control very specific behavior beyond the standard capabilities, such as very custom Bill-of-Material explosion, custom variant matching or the like.

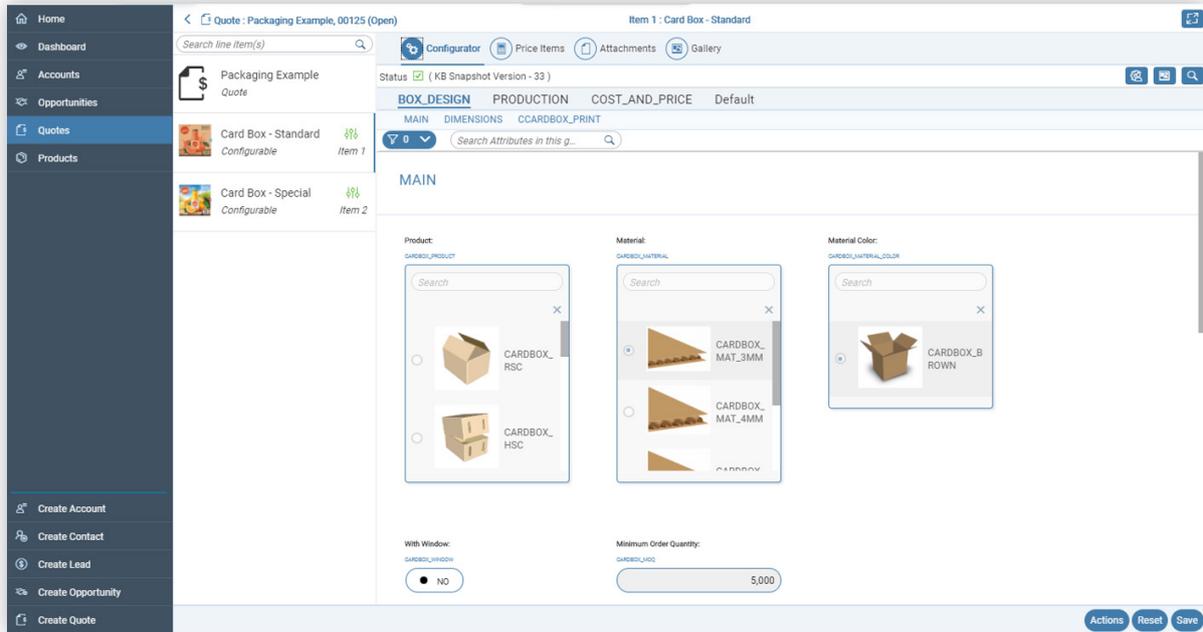


Figure 6: General Purpose Scripting Interface for Configuration

5. Multiple Formatted Text for Line Items

Manufacturing X supports quote level texts in a rich text editor and free text user input for line items. With 20/02 Manufacturing X introduces the feature to maintain multiple texts per line item which can be edited in a rich text editor. This is especially interesting for Engineer-to-Order Processes. These texts can be used for output documents, material creation or order texts.

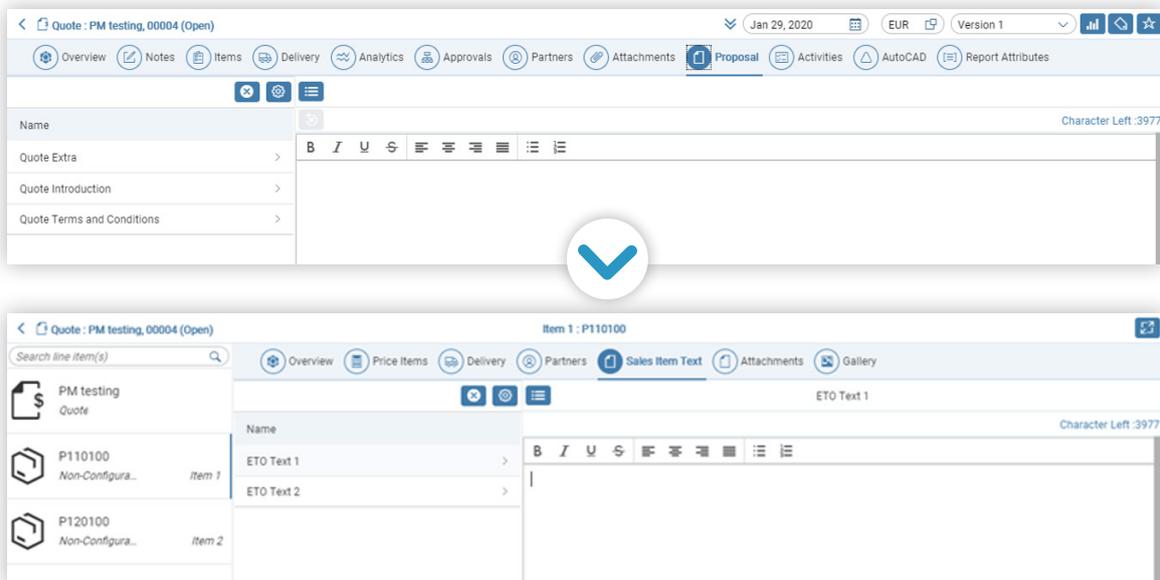


Figure 7: Multiple Formatted Text for Line Items

6. Enhanced External Pricing Control

Manufacturing X supports scenarios to call external systems such as an ERP for pricing. To ensure correct prices the system indicates when a pricing is required. With 20/02 Manufacturing X enhances this capability to allow a customer to define additional attributes to trigger a pricing request. This caters for scenarios, where the pricing is dependent on non-standard attributes such as inco terms, payment terms or custom attributes.

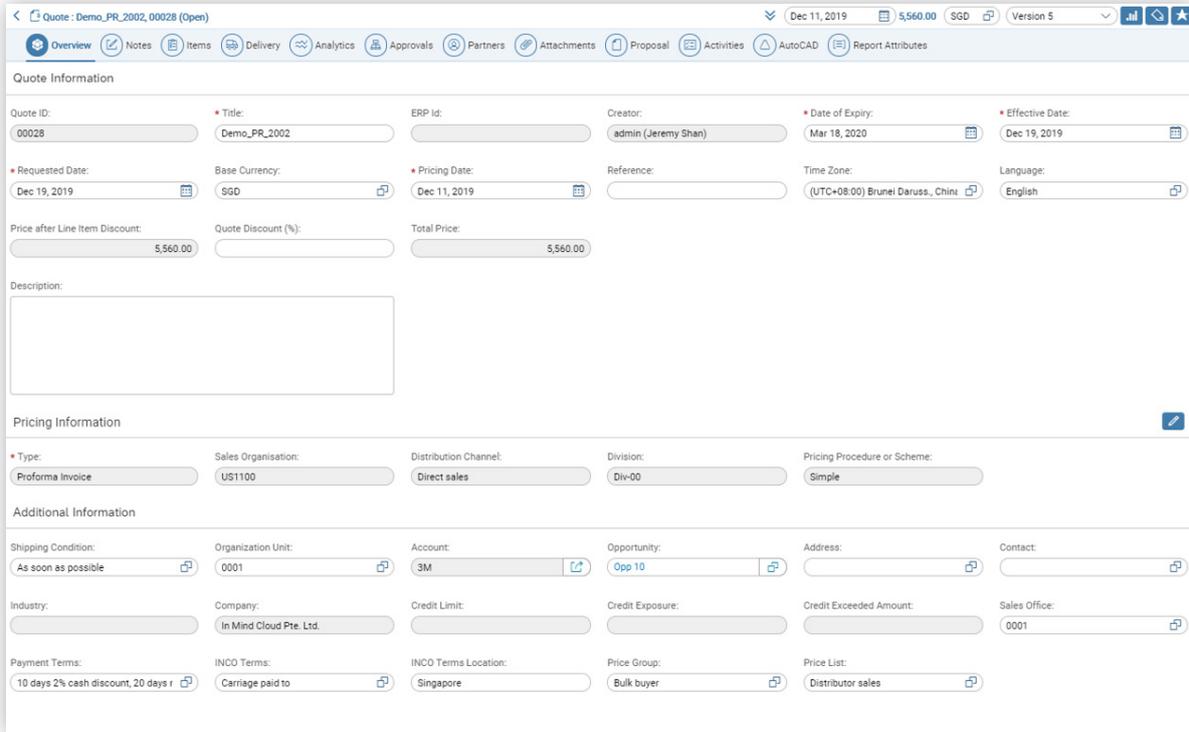


Figure 8: Enhanced External Pricing Control

5. Validation Rules for Google Maps Integration

Manufacturing X supports bi-directional integration with Google Maps for engineering or constructing use cases. With this release, Manufacturing X introduces a validation engine which will be triggered when users save the Google Maps drawing. The system will show the respective validation messages if certain rules are violated to guide users to create a proper and compliant layout design. This will help to avoid human errors by enforcing validation rules when a user tries to save the layout design and it will eventually improve quote accuracy.

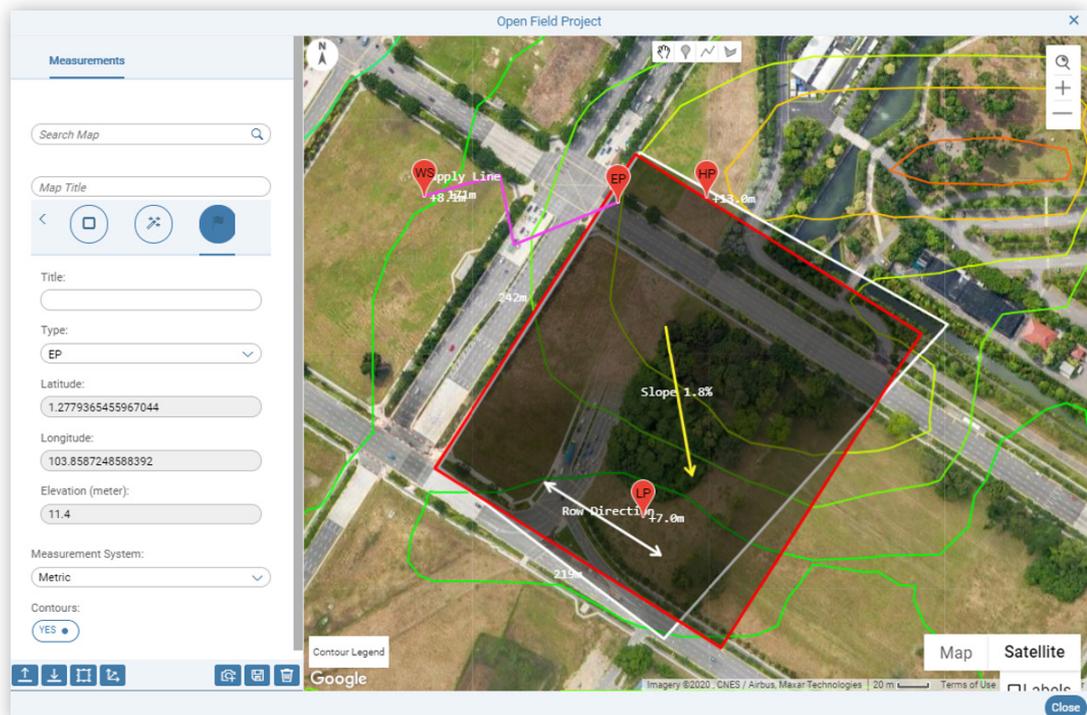


Figure 9: Validation Rules for Google Maps Integration

6. Redesign: Copy Line Items from Existing Quote

Manufacturing X allows to copy line items from existing quotes within a current quote, which significantly boosts the productivity. With this feature it is also possible to define re-usable sample quotes. In this release, In Mind Cloud further improves the user experience for this feature when working with multi-level products. Line item trees can be easily expanded and collapsed to speed up the selection process.

ID	Name	Quantity	Price	Quote Name	Quote ID
1	iPhone 1	1		PM Demo 2002	00008
1.1	10000000	1		PM Demo 2002	00008
1.2	10000010	1		PM Demo 2002	00008
1.3	10000020	1		PM Demo 2002	00008
2	iPhone 2	1		PM Demo 2002	00008
2.1	10000000	1		PM Demo 2002	00008
2.2	10000010	1		PM Demo 2002	00008
2.3	10000020	1		PM Demo 2002	00008

Figure 10: Copy Line Items from Existing Quote

7. Enhancement: Product Configuration Excel Upload

Manufacturing X allows to define Product Models (attributes, configuration, bill-of-material, etc.) in MS Excel and upload this to the system. This speeds up the re-using of existing data and to quickly define partial repetitive configuration rules. With the release 20/02 it is further possible to control the behavior of the bill-of-material from within the Excel format. This includes the quantity such as whether the components should change their quantity relative to the parent (e.g., double quantity of parent triggers doubling quantity of children) or not.

Position	BOM Entry Id	Product Label	External ID	Quantity	Quantity changes in relative with parent	Quantity updateable by user	Calculate Quantity
1	1	10000000	10000000	1	NO	NO	NO
2	2	10000010	10000010	1	NO	NO	NO
3	3	10000020	10000020	1	NO	NO	NO

Figure 11: Product Configuration Excel Upload

ABOUT US

In Mind Cloud (www.inmindcloud.com) is an independent provider of an innovative manufacturing sales platform. Our solution "Manufacturing X" combines CRM and CPQ with production expertise and intelligent insights to transform the profitability of manufacturing and engineering businesses. Based on the SAP Cloud Platform their solution is deeply integrated into manufacturing processes and front-end sales operations. In Mind Cloud is operating globally through its offices in Germany, Singapore, China and a high-value partner network.

View our [Support Page](#) for the [Release Schedule](#) in 2020