IN MIND CLOUD

Digitalize Manufacturing Sales

Manufacturing X
Sales Platform

RELEASE NOTES 20/05

KEY FEATURES & ENHANCEMENTS

Contents

Introduction

Easily finding the right data is mission-critical for efficient selling. In our **20/05** release, we improved **Manufacturing X's (MX)** search capabilities from the ground up. We included more data points for sorting and filtering, relative time queries, and saved searches. We also revamped the home page to display more relevant information for sales personel and management. Having an instant overview of how the business is going, and things that need their urgent attention is crucial for Sales Leaders to make an impact in revenue growth and business competitiveness. Team Leaders need to orchestrate staff and ensure the timely delivery of quotes. They rely on the perfect match to customer requirements and the seamless input delivered by other collaborators. With the new Gantt view released in 20/05 their life does not just get much easier but they will be able to push their teams to be highly effective.

1. General Search Capabilities

Easily finding the right data is mission-critical for efficiently selling. In release 20/05, Manufacturing X's (MX) search capabilities have been improved from the ground up, including more data points for sort and filter, relative time queries and saved searches. Here the details:

- Additional fields to filter, sort and display the key objects (Account, Opportunity, Quote, etc.) to create more targeted searches and produce more accurate search results.

- 'Relative Selects' allowing a user to conveniently filter dates e.g. by the next quarter, coming month, etc. as well as searching by partner functions for the currently logged-in user or within the current organizational hierarchy.

- 'Saved Searches' enabling end users to choose from pre-defined search queries without specifying sort, search and display parameters on a frequent basis.

The following sections outline enhancements in more detail.

1.1. Additional Fields Available for Filter, Sort and Display

Every major business object (i.e. accounts, opportunities, quotes and products) received **additional fields** which have been **enabled for filter, sort and display** within their respective data sets creating a more consistent end user experience as well as now allowing to create even more accurate search queries.

One key enhancement is filtering, and sorting based on Partner Functions which may include Ship-To, Bill-To, Distribution Partners, Responsible Sales Rep as well as other personnel (e.g., Order Processor, Sales Engineer, etc.). This feature supports the search for business objects by either searching for users that have been assigned any partner function, or search for objects that have specific partner functions maintained:

Query Example	Meaning
Partner Function Role = 'Employee Responsible'	Returns objects where the respective partner function has been maintained.
Partner Function User = 'John Doe'	Returns objects where any partner function is associated to user 'John Doe'.
Partner Function User = 'Current user'	Returns objects where any partner function is associated to logged-in user.
Owner = 'Current user'	Returns objects where owner is logged-in user.

In addition to the added fields, the sequence of the fields has been updated to represent the most critical attributes in a default layout. The following table lists sample fields that have been added as a filter to the respective business object.

Accounts	Products	Opportunities	Quotes
Is Favorite	Is Favorite	Is Favorite	Is Favorite
Partner Function	Product Tags	Partner Function	Partner Function
Is Prospect	Tags	Account	Pricing Date
Account Group	Created On	Source	Date of Expiry
Creator	Last Updated	Chance of Success (%)	Submit Date
Classification	Description	Volume	Closed Date
Website	Sales Team	Weighted Volume	Created On
Creation On		Revenue Start / End	
Last Updated		Org Unit	Org Unit

Accounts	Products	Opportunities	Quotes
City		Sales Org	Sales Org
Zip		Distribution Channel	Distribution Channel
Province / State		Division	Division
		Sales Office	Sales Office

A more complete list can be found in the Appendix.

1.2. Relative Selects

Finding object such as opportunities and quotes relative to the current point in time or in a user's organizational unit is a common requirement. Therefore, MX now supports **Relative Selects** which enable users to create powerful search queries that use date reference points or search within the user's assigned organization unit. Examples are:

- Opportunities closing this month
- Quotes closing this and next quarter
- Opportunities I own
- Opportunities owned by users in my Organizational unit
- Etc.

The following pre-defined relative selects are delivered by default:

Date Selects	User Relative Selects
90 Days from today	Me / Current User
First day of last Month / Quarter/ Year	Users in My Organization (Unit)
First day of next Month / Quarter / Year	Users in My Organization Hierarchy
First day of this Month / Quarter / Year	
Last day of next Month / Quarter / Year	
Last year, first day of this Month and Quarter	
Last year, first day of this Month and Quarter	
Last year, today's date	
Today's Date	

For unmet requirements (e.g. 'Next 30 Days'), an administrator can create new relative selects:

Configuration   Localisation

Name:
Next 30 Days

* Type:
Days

* Offset:
30.00

ERP Id:

Tester

Today's Date:
Apr 22, 2020

Resulting Filtering Date:
May 21, 2020

04

To demonstrate how flexible and powerful the relative selects are, here are a few examples:

Example ··· **How to Configure**

Year to Date (YTD)

Date => First day of this year AND

Date =< Today's Date

＞

Filter

Expected Closure	⌄
Greater than equal to	⌄
MMM d, y	📅
First day of this year	⧉
⊗	

Expected Closure	⌄
Less than equal to	⌄
MMM d, y	📅
Today's Date	⧉
⊗ ＋	

Current Quarter

Date => First day of this quarter AND

Date < First day of next quarter

＞

Filter

Expected Closure	⌄
Greater than equal to	⌄
MMM d, y	📅
First day of this quarter	⧉
⊗	

Expected Closure	⌄
Less than	⌄
MMM d, y	📅
First day of next quarter	⧉
⊗ ＋	

Rolling Two Quarters

Date => First day of this quarter AND

Date =< Last day of next quarter

＞

Filter

Expected Closure	⌄
Greater than equal to	⌄
MMM d, y	📅
First day of this quarter	⧉
⊗	

| Expected Closure | ⌄ |
Less than equal to	⌄
MMM d, y	📅
Last day of next quarter	⧉
⊗ ＋	

1.3. Saved Search

Many search queries are used frequently for different purposes, such as for account segmentation, management or tasks to organize your daily work. Instead of posting search queries on the same data object repeatedly, end users can now use a '**Saved Search**': a pre-defined search query comprising the following:

- Filter criteria

- Sort parameters

- Display fields

An administrator can create these queries directly in the UI and save the combination, provide a meaningful name, and maintain role specific exceptions (e.g. hide certain queries from business roles, change the sequence, etc.). End users can then select and execute these queries without having to configure them manually:
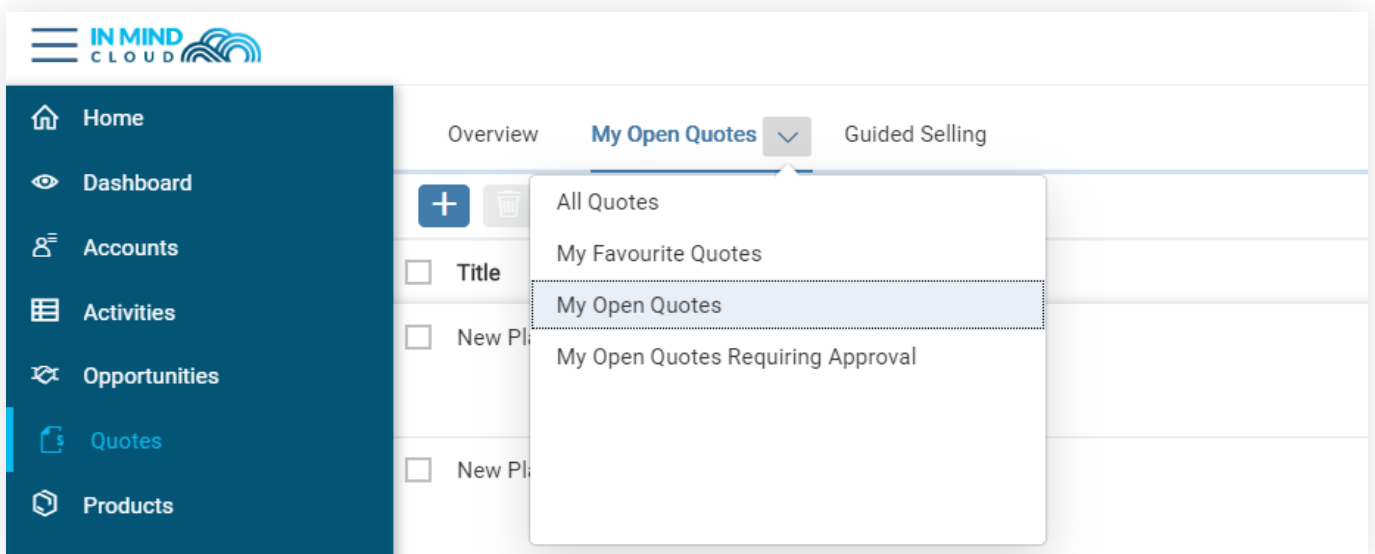
The delivery of 20/05 will comprise the following standard queries:

Objects	Standard Queries
Account, Lead, Opportunity, Quotes, Emails	'All' and 'My Favorites', e.g. *All Accounts* *My Favorite Accounts*
Activity – Tasks, Phone Calls, Meetings	'All' and 'My Upcoming', e.g. *All Tasks* *(My) Upcoming Tasks*

1.3.1. Configuration

Administrators can configure additional saved searches based on business requirements. Under the respective search area, a new feature '**Saved Searches**' has been enabled for users with an administrator role. Once the search has been configured (including sorting parameters and setting the required information types), the administrator can choose to save the query:
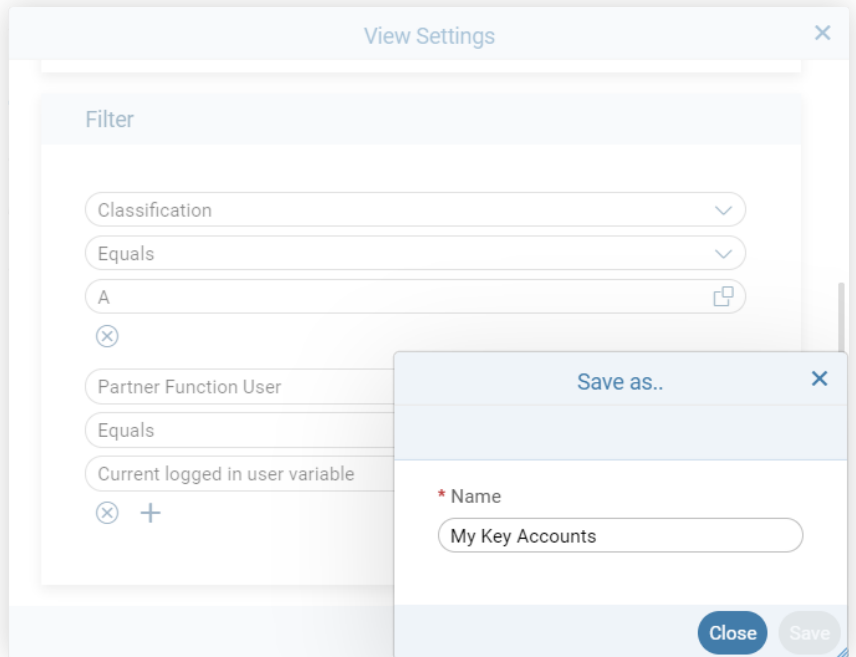
Under the tab '**Saved Searches**' the admin can now manage the sequence of available queries for this object, hide certain queries, delete queries (except for the standard ones) and change the query's name (including localized names):
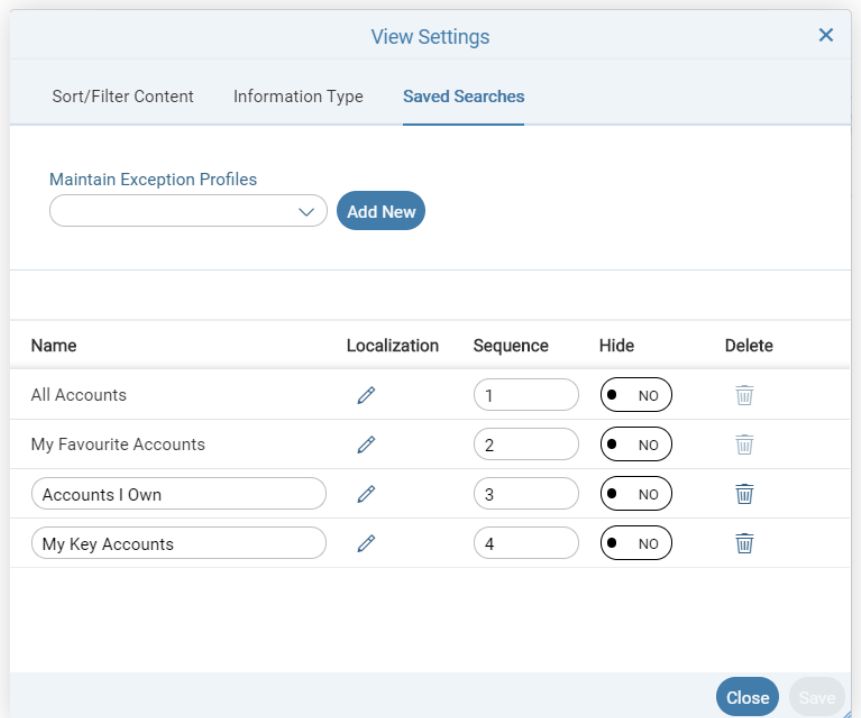
1.3.2. Maintain Role Specific Exceptions

If certain saved searches should not be available to certain user roles, an exception profile can be maintained:

In the example, the 'All Accounts' saved search will not be available to users with role 'ROLE_SALES_RESTRICTED' assigned. When maintaining those exceptions, the administrator can choose between the following options:

- **Inherit**; depending on what has been defined on the saved search query, the respective query will either be shown or hidden.

- **Show**; even if the respective query may be defined as 'Hidden', it can be shown to users that are assigned to the role belonging to the exception profile.

- **Hide**; irrespective of what has defined on the query itself, it will be hidden to these users.

2. UI Widgets

A new KPI-based Homepage was first introduced in 20/02 comprising table and tile widgets to easily identify crucial data points and provide quick access to the same. Further enhancing the homepage and turning it into a Dashboard for Sales Reps and Managers alike, to have the most critical business information available as soon as they log into MX. MX now features multiple chart types, entry points to launch external systems and shortcuts to the most commonly used functions within the application itself.

In the 20/05 release, customers are now able to configure their own widgets utilizing the powerful search capabilities outlined in the previous section to create dashboards keeping your users and managers on top of their day-to-day activities:
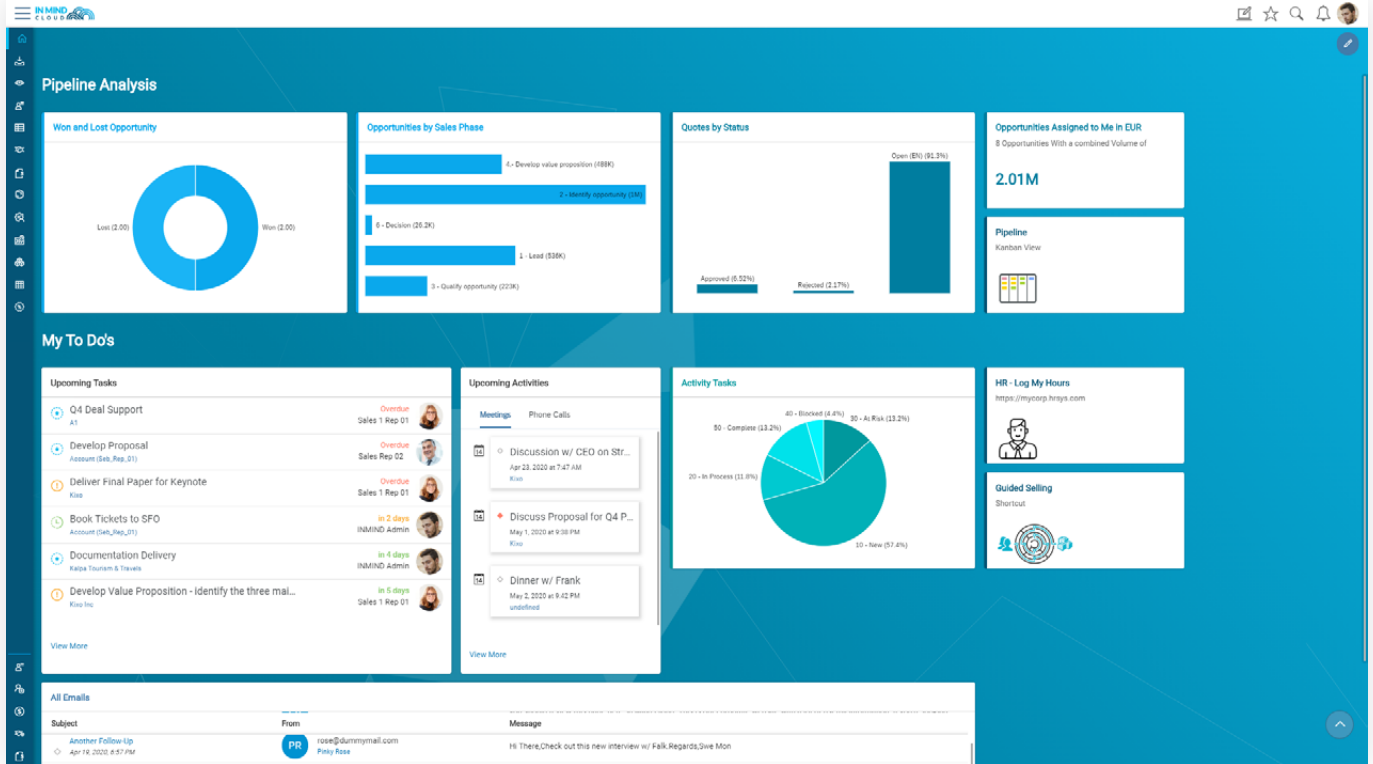
2.1. Configuration

MX now supports the following widget types:

Widget Type	⟶	Examples

Number Tile ▶ **Number Tiles** support aggregating certain values, e.g. the total value of opportunities in system currency owned by the current user or the total number of accounts assigned to the user.

Sample in Violet color below.

Chart Tile ▶ **Chart Tiles** can render pie, donut, bar or column charts providing a breakdown or group-by of certain objects, e.g. opportunities by sales phase or quotes by status.

Sample in Red color below.

Icon Tile ▶ For frequently accesses links, whether specific MX functions or external systems, **Icon Tiles** can be used to create shortcuts to these pages. To provide a better visual experience, icons can be uploaded to improvide the intuitive usage of these tiles.

Sample in Dark Blue color below.

Table Tile ▶ Data sets (i.e. Accounts, Leads, Opportunities, Quotes, Products, or Emails) can be rendered as a **table tile** providing direct access to the respective objects.

Sample in Green color below.

MX Widgets ▶ **Specialized widgets** to display upcoming tasks and activities provide an optimized user experience.
(delivered by In Mind Cloud)

Sample in Yellow color below.

Sample layout with reference to the aforementioned widget types:
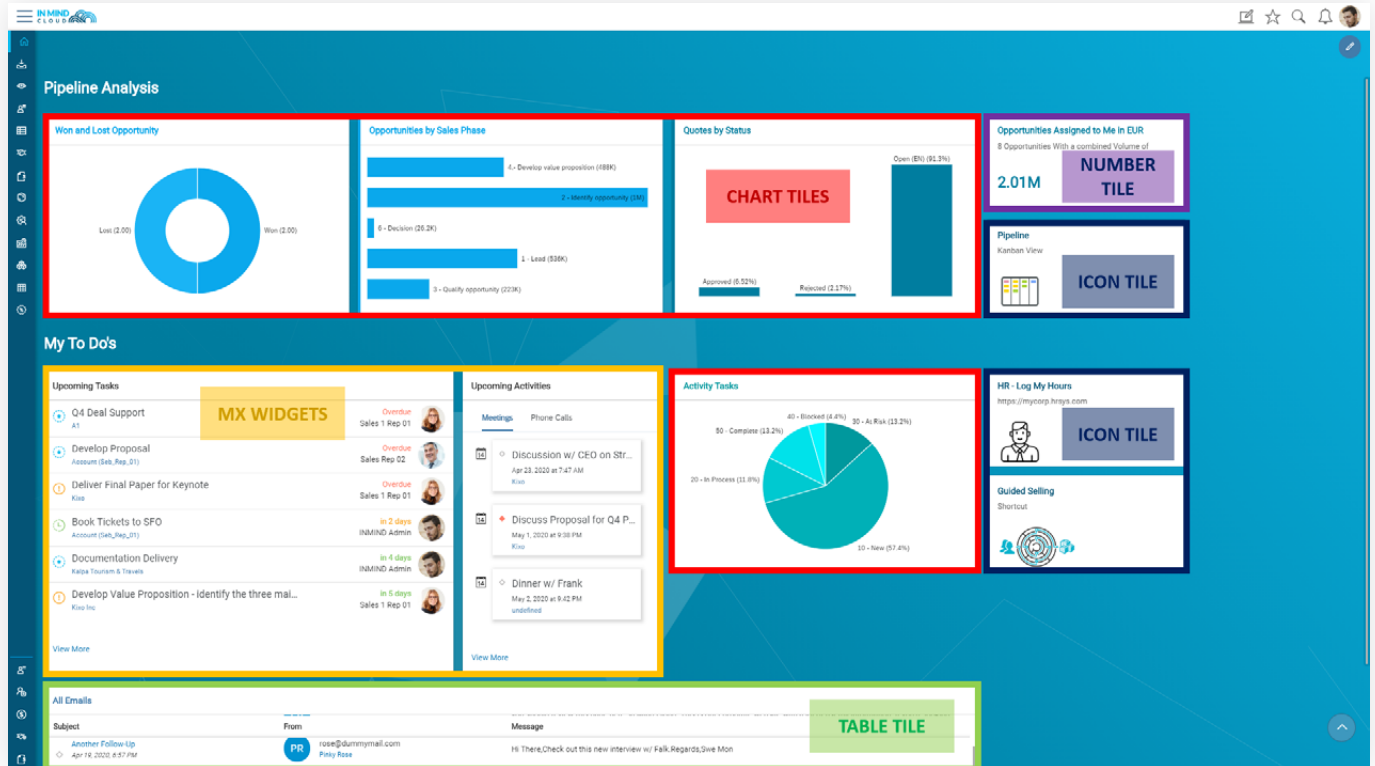
Widgets can be assigned to sections (e.g. 'Pipeline Analysis' and 'My To Do's' in the above image) and grouped on the homepage. An admin can define the sequence of sections as well as the sequence of the widgets within the sections based on priorities of his / her end users, boosting productivity and efficiency.

For each widget, an administrator can define the following parameters:

- What data to show (based on the combination of the respective business object (e.g. Opportunities) and a saved search (e.g. 'My Open Opportunities')).

- How to render the data (e.g. a number tile or a chart tile).

- Where to navigate to (when clicking, the user can e.g. navigate to a data set or, for icon tiles, a URL can be configured that is either within MX or pointing to an external system / website).

The configuration screen (including preview options) allows to configure these tiles within a few clicks:

10
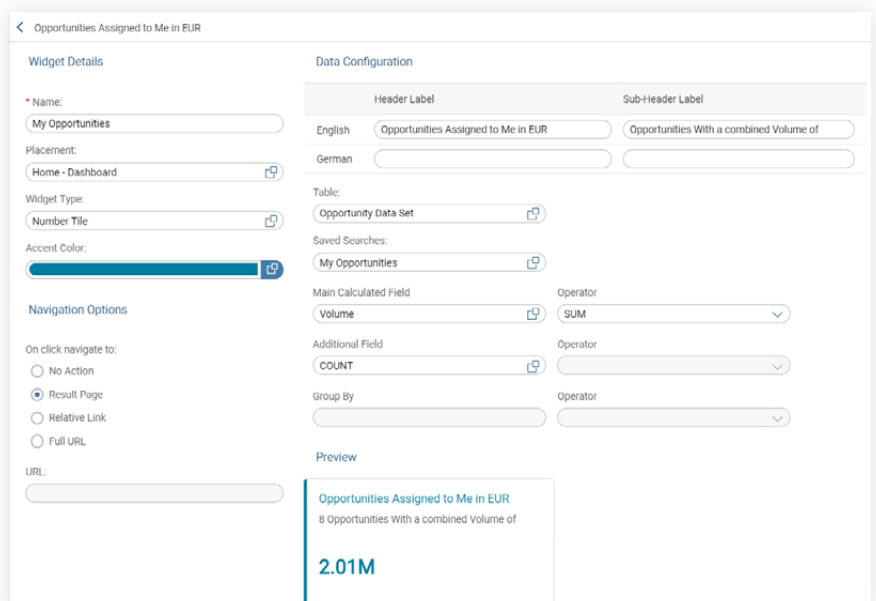
2.2. UI Widget Profiles and Assignment to Role

Widgets can now be flexibly assigned to roles so that different user groups (assigned to different roles) will have an adequate user experience when logging on to MX providing them with the most relevant information needed to execute their day to day activities.
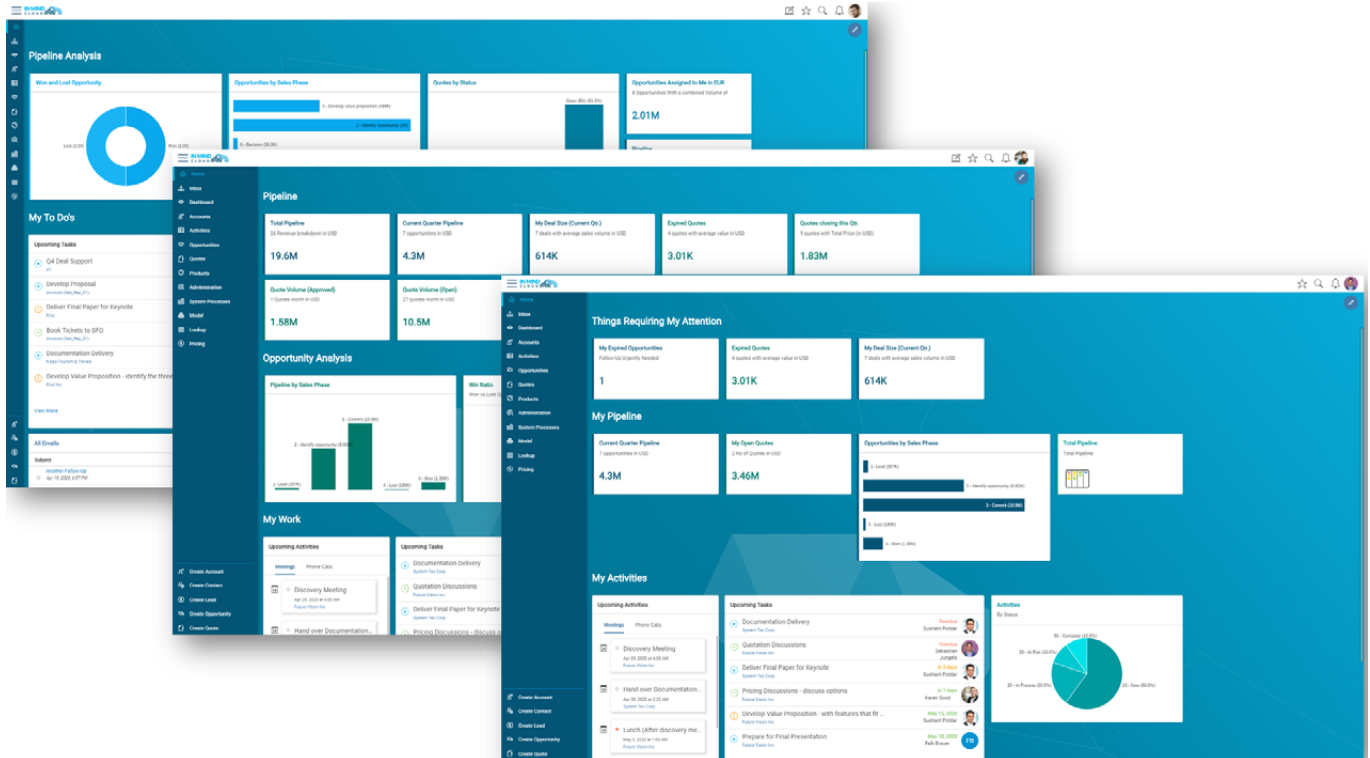
NOTE: The homepage and account overview pages introduced in 20/02 need to be manually re-created for the respective widgets to show under the homepage. A separate how-to document will be provided.

3. Activity Management

In 20/02, **Activity Management** was introduced with Tasks being a first class citizen in MX. As part of the 20/05 release, additional features and capabilities have been added, including email, meeting and phone call tracking as well as a Gantt Chart representation for complex RFQs to support advanced collaboration and deadline tracking.

## 3.1. New Activity Types: Emails, Meetings and Phone Calls

Three new activity types to capture **emails, meetings** and **phone calls** have been added to the scope of MX as part of 20/05. Activities can be referenced to quotes, opportunities and accounts respectively showing the entire interaction history to the user to get a full 360 view of the past activities as well as of activities scheduled in the future.

11

3.1.1. Emails

When integrated via API (with e.g. Outlook 365), MX will extract **email addresses** and determine whether those emails are known contacts in the system and tag them accordingly. If not, MX indicates to the user that a new contact has been referenced, and allowing a convenient way to convert the email address into a proper MX contact, therefore increasing data completeness and assisting the user to also improve data quality:
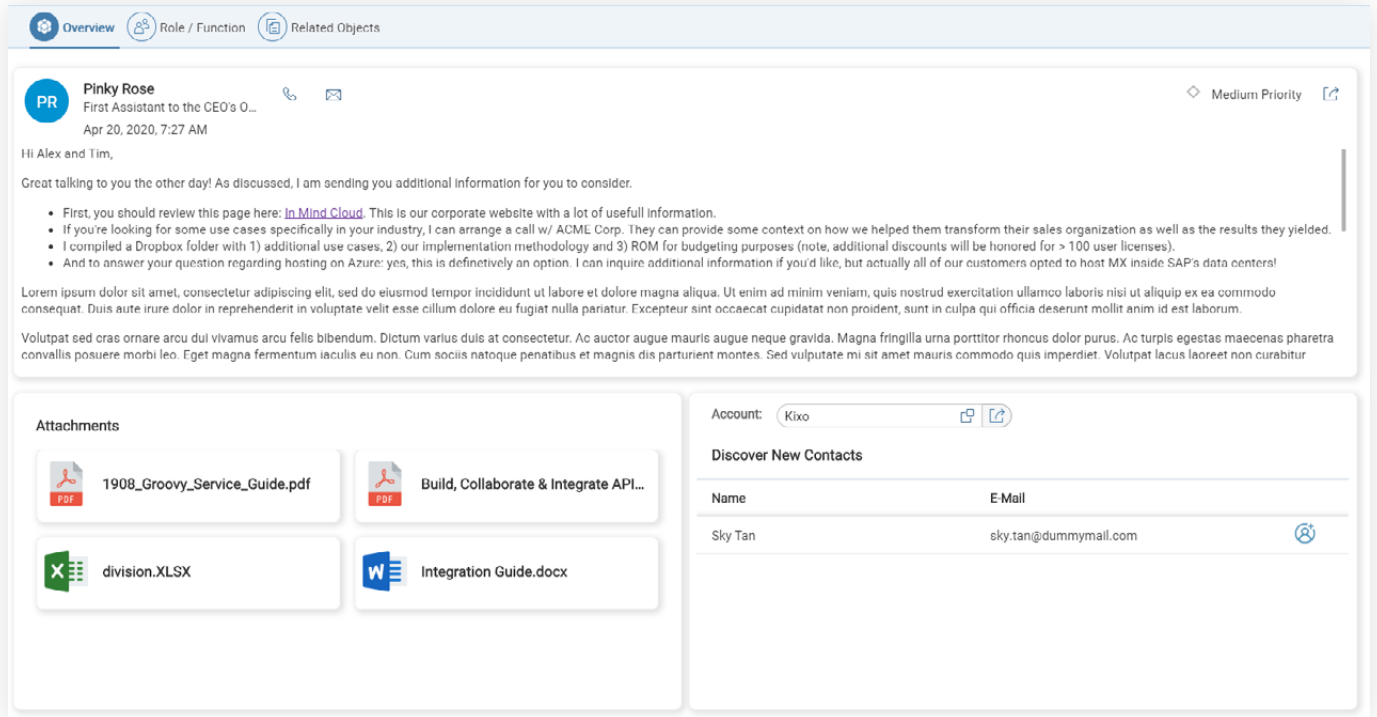
If a contact should be added to MX, the user can simply click on the create contact button under the section '**Discover New Contacts**'. This will trigger the respective creation dialog with fields being populated directly from the API:


12
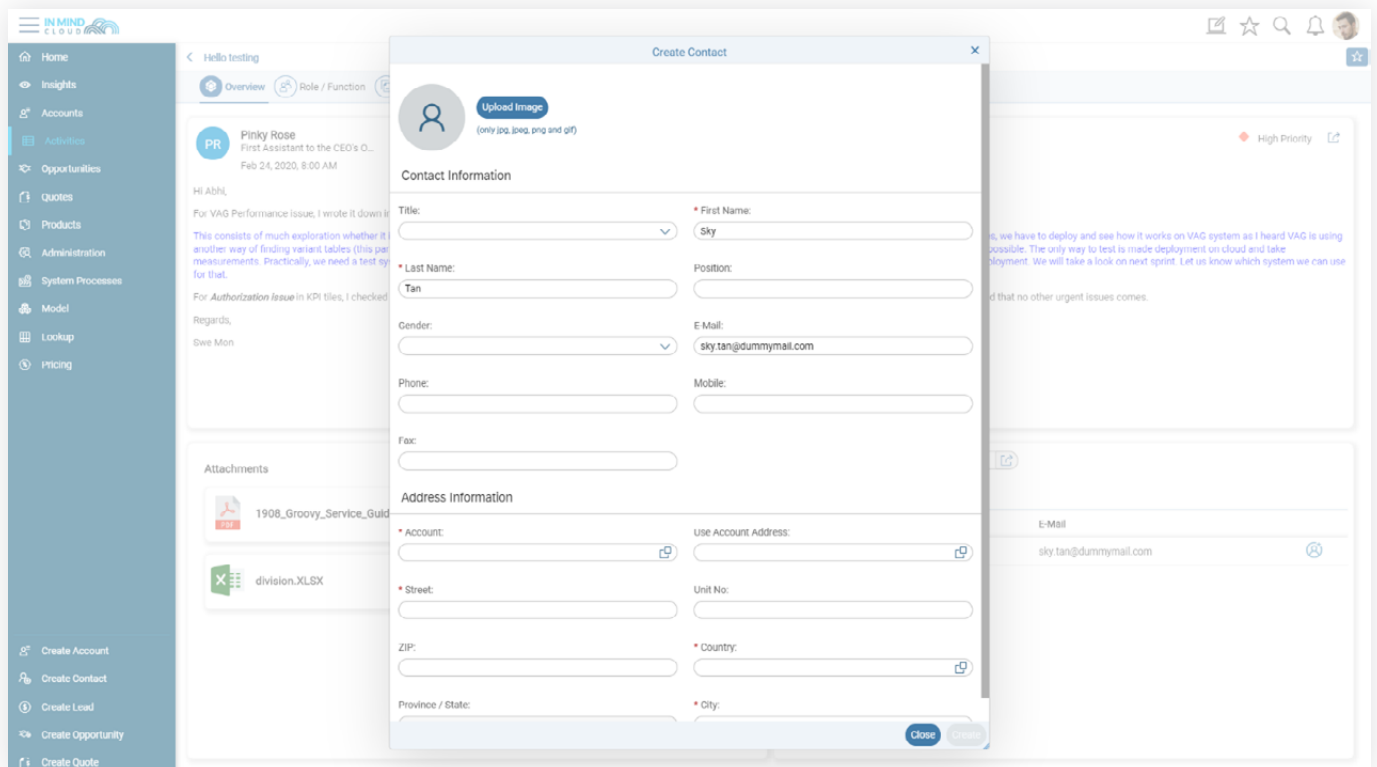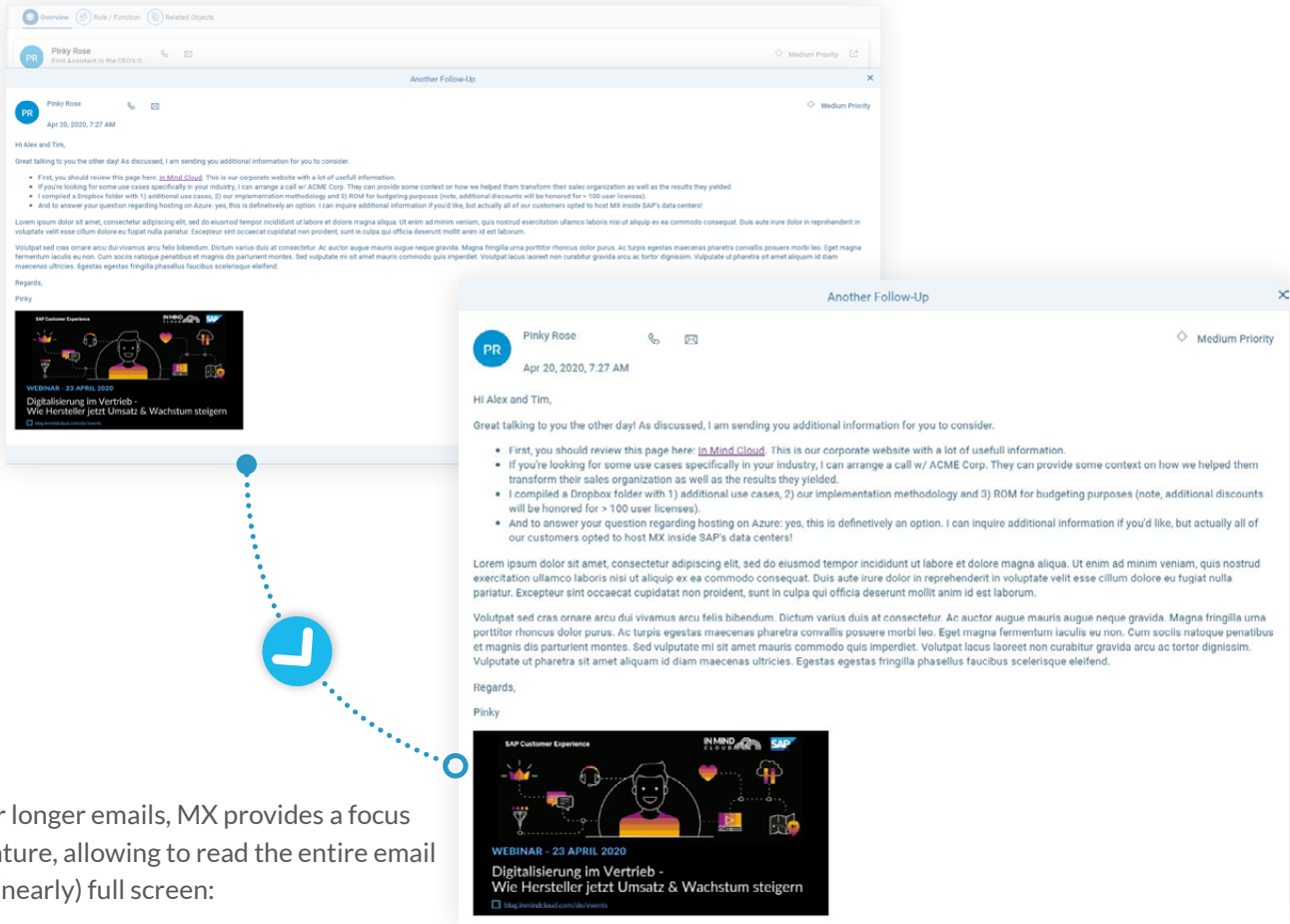
For longer emails, MX provides a focus feature, allowing to read the entire email in (nearly) full screen:

3.1.2. Meetings and Phone Calls

Meetings and Phone Calls follow the same UI concept as tasks: a small and simple side card allows a sales rep to quickly log meetings and phone calls, record outcome, decision points or minutes of meeting and close out the interaction within a few clicks.


13
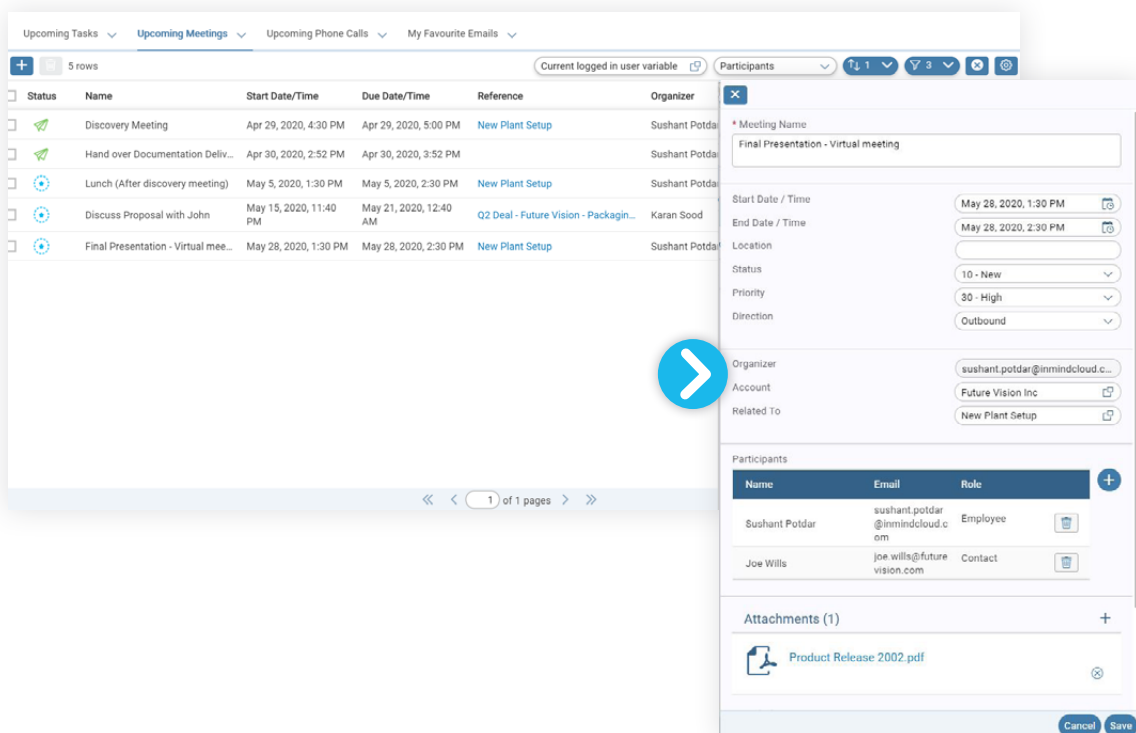
3.1.3. API Updates

The **activity API's** have been updated and are now available for all activity sub-types as shown in the technical documentation and reference code.

3.2. Gantt Chart View for Accounts, Quotes and Opportunity

Selling more complex products and solutions is often like a little project, especially when you embark on tenders for bigger business opportunities. Knowing and tracking all participants tasks and timelines tasks and timelines help to coordinate complex sales cycles across multiple parties involved, thus improving the overall collaboration and chance of success.

Tasks can now be presented in a **Gantt Chart** allowing to manage the most complex sales cycles and keeping milestones and deadline in mind:
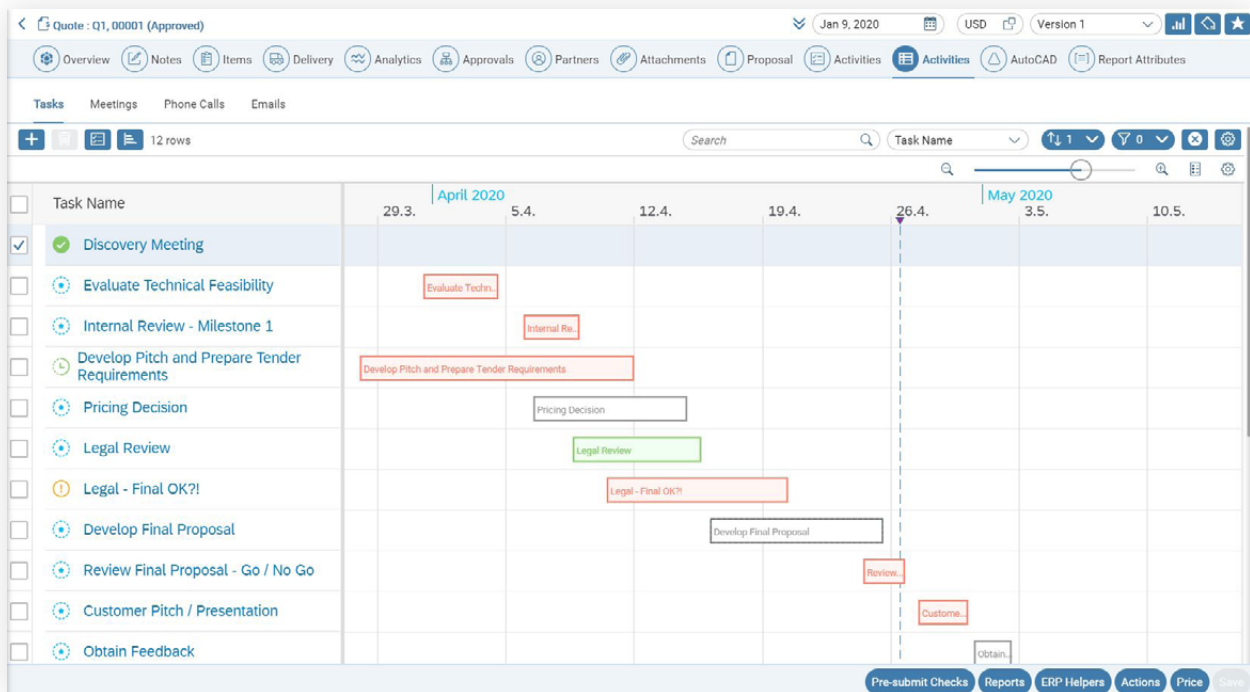
Sales reps can maintain and assign tasks, enter respective progress / completion information per task and keep the entire sales team updated.

3.3. New MX Widgets for Homepage

Two new '**MX Widgets**' for 'Upcoming Tasks' and Upcoming Activities' have been added and can be used within a widget profile.

14

3.3.1. Upcoming Tasks

Staying on top of their schedules is key to sales reps: missed deadlines, overdue tasks will be a thing of the past as MX now shows **upcoming tasks** directly on the homepage.

With intuitive color-coding to indicate overdue, and quickly approaching deadlines, as well as the days left for a task to be completed, users will be able to manage schedules always keeping an eye on their to-do list.

Tasks that have been either marked as 'cancelled' or 'completed' will not be shown on this tile.

3.3.2. Upcoming Activities

Like the 'Upcoming Tasks', this tile will show in a consolidated view, both activities of type '**Phone Calls**' and '**Meetings**' that are scheduled next.

The user can toggle the view between 'Meetings' and 'Phone Calls' to get a sequential view of both activity sub-types.

The 'View More' link will take the user to the respective data set, with the correct filters applied (i.e. open (or not closed / not cancelled) activities assigned to the current user with an end date greater than now).

4. Favorites and Inbox

As part of the MX Homepage UI improvements, links to 'Favorites' and 'Inbox' have been removed from the homepage. Therefore, both features have received their own links making them accessible from anywhere in the application for quick access.

4.1. Favorites

Favorites can now be accessed from the top application bar which is available anywhere in the application. That way, the user does not have to navigate back to the homepage and click on the respective link:

On the newly design landing page for favorites, attributes are shown that are critical business attributes that are specific to the respective business object, providing even more information to the user as s/he selects the correct favorite:

16
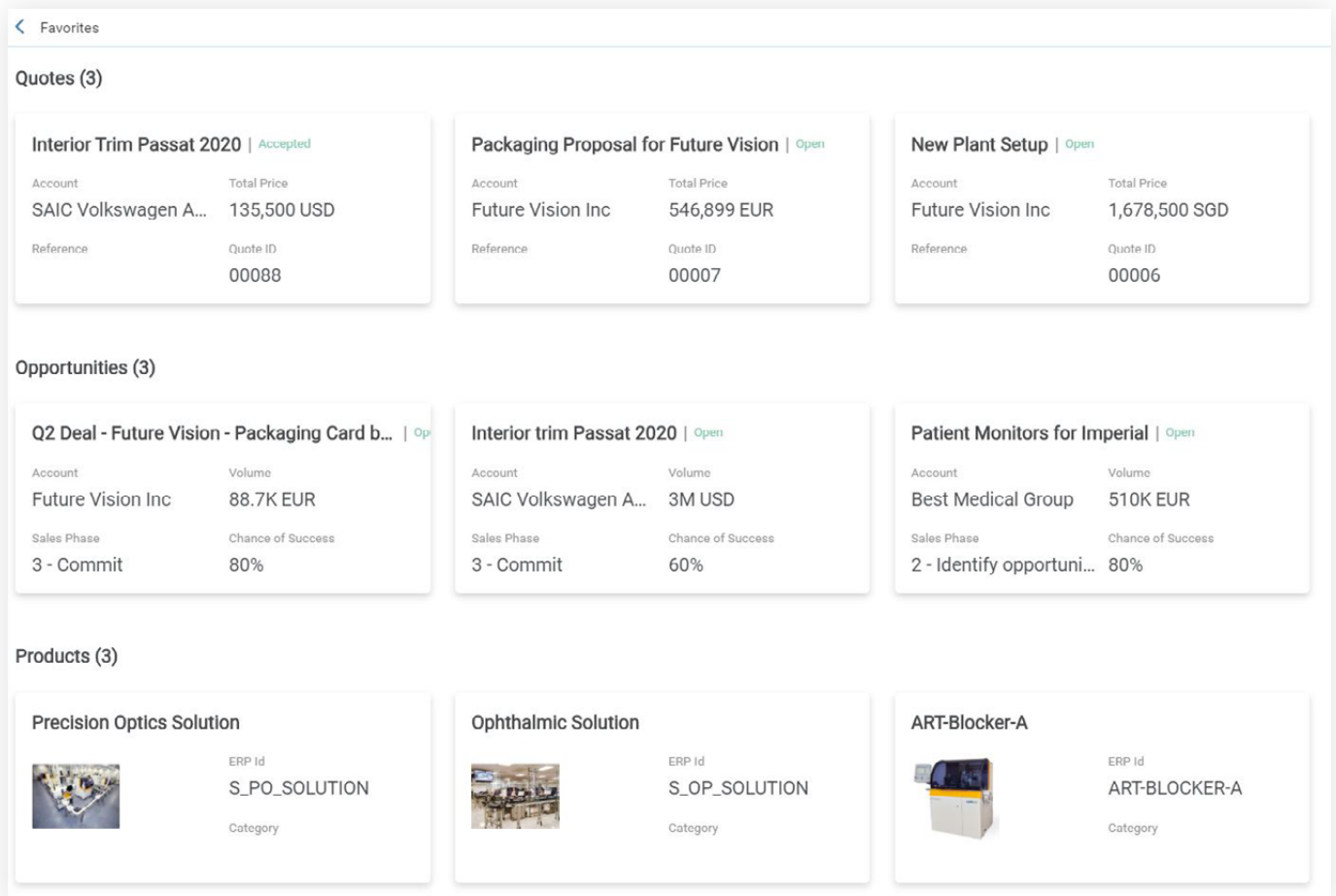
4.2. Inbox

Inbox can now be found in the main navigation bar allowing convenient access to users without first navigating to the homepage.

5. Access Permissions
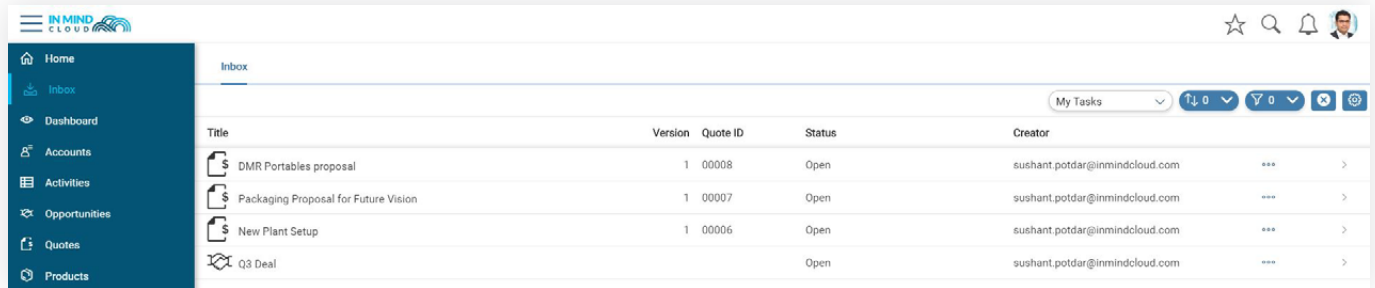
To provide more flexibility and consistency when designing **access permissions and rules**, the standard delivered rules have been updated to provide the right level of access restrictions based on your business requirements. The following sample rules are shipped as part of the 20/05 standard delivery across all major business objects (i.e. account, contact, activity, lead, opportunity, quote):

- Current User is Creator / Owner / assigned a Partner Function

- Current User is within the Org Unit of Creator / Owner / Partner Function

- For contacts and activities, we allow to inherit access based on the access of the linked account

- You can now also restrict users seen, e.g. when adding assignees to a task

6. Action Workflow Enhancement

To improve the user experience as well as data quality, MX will now show only the relevant clickable actions based on the current quoting process. The rest of the action buttons will be greyed out.

For example, if a quote has not been saved yet, the four action group buttons (i.e. Pre-submit Checks, Reports, ERP Helpers and Actions) are greyed out. After a successful save or retrieval of pricing, relevant available actions become clickable.

17
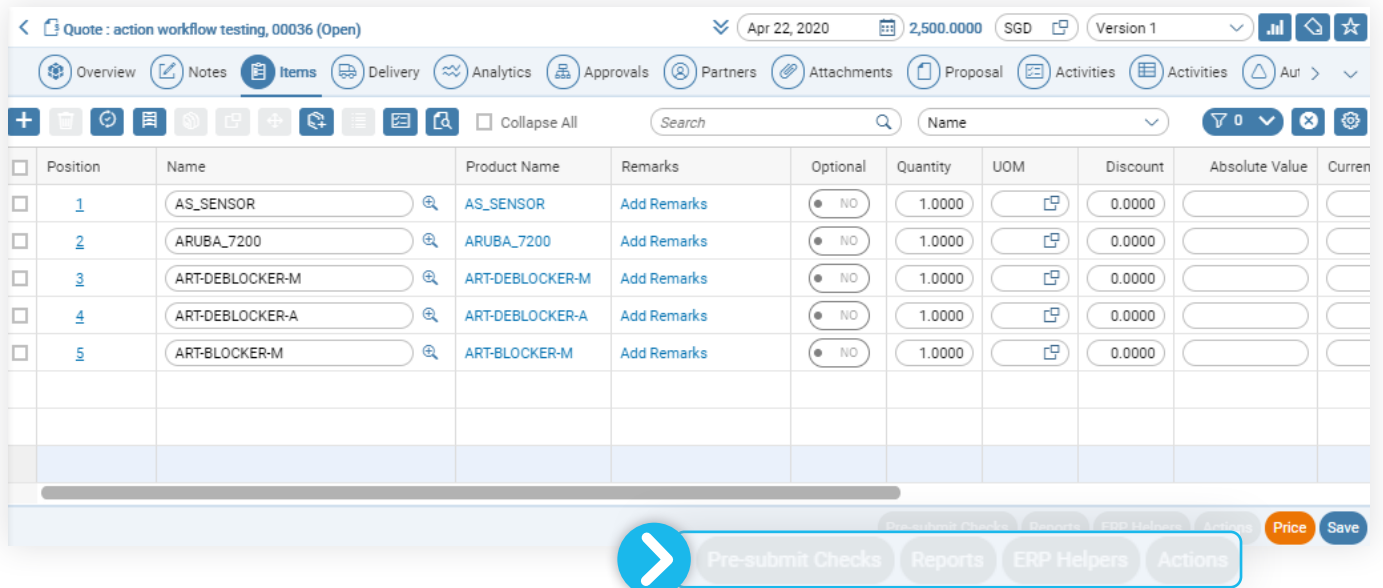
7. APPENDIX

7.1. Fields Added for Filter / Sort / Display

7.1.1. Accounts

Field	Available for		
	Sort	Filter	Display
Name	X	X	X
ERP ID	X	X	X
Prospect	X	X	X
Account Group	X	X	X
Status	X	X	X
Creator	X	X	X
Owner	X	X	X
Region	X	X	X
Type	X	X	X
Industry	X	X	X
Classification	X	X	X
Website	X	X	X
Description	X	X	X
Country	X	X	X
City	X	X	X
Created On	X	X	X
Last Updated	X	X	X
ZIP	X	X	X
Province / State	X	X	X
Tags		X	X
Partner Function Role		X	
Partner Function User		X	
Favorite		X	

7.1.2. Opportunities

Field	Available for		
	Sort	Filter	Display
Title	X	X	X
SAP ID	X	X	X
External ID	X	X	X
Account	X	X	X
Owner	X	X	X
Source	X	X	X
Sales Phase	X	X	X
Chance of Success (%)	X	X	X
Volume	X	X	X
Weighted Volume	X	X	X
Currency	X	X	X
Expected Closure	X	X	X
Revenue Start Date	X	X	X
Revenue End Date	X	X	X
Organization Unit	X	X	X

18

Field	Available for		
	Sort	**Filter**	**Display**
Distribution Channel	X	X	X
Division	X	X	X
Sales Office	X	X	X
Created On	X	X	X
Last Updated	X	X	X
Creator	X	X	X
Status	X	X	X
Tags		X	X
Favorite		X	
Description		X	X
Partner Function Role		X	
Partner Function User		X	
Quoted Volume			X
Reporting Volume			X
Sales Organization			

7.1.3. Quotes

Field	Available for		
	Sort	**Filter**	**Display**
Quote ID	X	X	X
Title	X	X	X
ERP ID	X	X	X
Creator	X	X	X
Pricing Date	X	X	X
Organization Unit	X	X	
Date of Expiry	X	X	X
Total Sales (Volume)	X	X	X
Sales Organization	X	X	
Distribution Channel	X	X	
Division	X	X	
Last Updated	X	X	X
Submit Date	X	X	X
Closed Date	X	X	X
Sales Office	X	X	
Account	X	X	X
Status	X	X	X
Created On	X	X	X
Tags		X	X
Favorite		X	
Partner Function Role		X	
Partner Function User		X	
Description			X
Version			X

19

7.1.4. Products

Field	Available for		
	Sort	**Filter**	**Display**
Product Name	X	X	X
External ID	X	X	X
Status	X	X	X
Type	X	X	X
Product Label	X	X	X
Created On	X	X	X
Last Updated	X	X	X
Product ID		X	
Product Tags		X	X
Description		X	X
Attributes		X	
Sales Team		X	
Favorite		X	
Image			X