Sales Manager
The Replacement to SOPM 2023

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Sales and Order Processing SOPM

Fourth Shift Summit 2023

- **Introduction**

- **SOPM Off Target**

- **eCommerce Framework**

- **Sales Manager Demo**

SOPM – Off Target - Outdated

ICG

1. **SOPM is deficient:**
    *   Separate application with No Planned Updates
    *   Old – designed and built for a bygone era *(Windows95)*
    *   Clunky – Kludgy UI
    *   Rules based pricing is limiting and difficult

2. **All communication and workflow is manual**
    *   Customers
    *   Engineering
    *   Production
    *   Email Capability very limited

3. **Manual Workflow**
    *   Text is very limited – non directable
    *   Cannot adjust built-in business Logic FS Logic
    *   No Internal documentation or communications
    *   No ability to have internal notes

4. **Difficult to find anything:**
    *   Rudimentary Searching
    *   Order Information
    *   Shipment Status
    *   Invoices – Sales history – etc.
    *   Need to visit multiple screens or return to the core FS application to find additional information at times. Or Reports required

5. **Limited quoting ability**
    *   No quote management & promotion
    *   No quote revisions
    *   Can't copy quotes or orders

6. **Limited Customization Ability**
    *   No 3rd Party integration
    *   No UI Customization

What Does Sales Manager Solve For Fourth Shift Customers?

ICG

1. **Modern Single Interface for:**
   Quoting, Order Entry, Customers, Pricing, Documents, and Workflow

2. **Real-time & fully integrated with Fourth Shift**

3. **Proven technology and supported software**

4. **Fixed annual costs. No Surprises**

5. **Always Fast – Always Accessible**

6. **Well-Designed** – built and used by customer service groups for over 17 years.

7. **eCommerce Capable**

8. **Easy to Manage**
   - Built by Xtern/ICG with the goals of speed and low maintenance
   - 100% increase in order entry efficiency
   - All datasets are maintained within Fourth Shift to ensure data accuracy

9. **Supported Integrations**
   - Custom Products Support
   - Integrated with Options Assistant
   - Sales Tax (Vertex/Avatax
   - Credit Card Functionality

10. **Additional Features**
    - Business Logic Layer allows customization and tailoring
    - Customizable User Interface

What Does Sales Manager Solve For Fourth Shift Customers?

ICG

11. Completely Customizable to your Processes

- The UI can be customized to support your businesses' specific processes.
- Visual Cues and Color Coding Throughout
- Integrate with 3rd Party Applications – Freight – CRM – etc..

12. Eliminate Manual Processes: Enable Customer

- Service to focus on orders and customers, not manual workflows.

13. Notes:

- Unlimited directable notes to documents. Internal notes and status notes as well.

14. Meaningful Metrics

- Dashboard/screens for Sales Data
- Credits
- Inventory
- ARTB/ARIC Built In
- Collection Information
- Reminders
- and more….

Avalara Integration Example

ICG

With Avalara or Vertex Estimating Sales Tax is One Click in Sales Manager or Q2O:
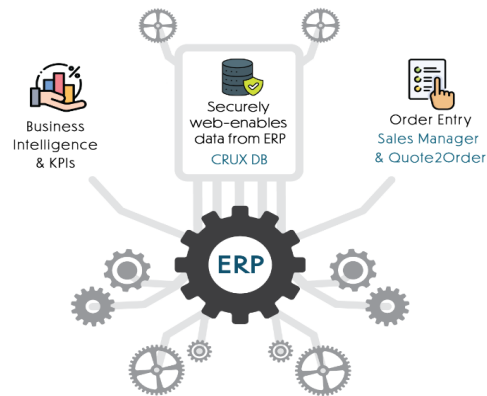
| Estimated Sales Tax | | ... |

With Avalara You Can Also See Certs On File

Certificates On File

State	Status	Valid	Verified	Signed Date	Expiration Date	Verification Number	Tax Number
Georgia	COMPLETE	Y	N	2017-06-30	9999-12-31		

eCommerce Ecosystem

eCommerce Ecosystem

Business Intelligence & KPIs

Securely web-enables data from ERP
CRUX DB

Order Entry
Sales Manager & Quote2Order

ERP

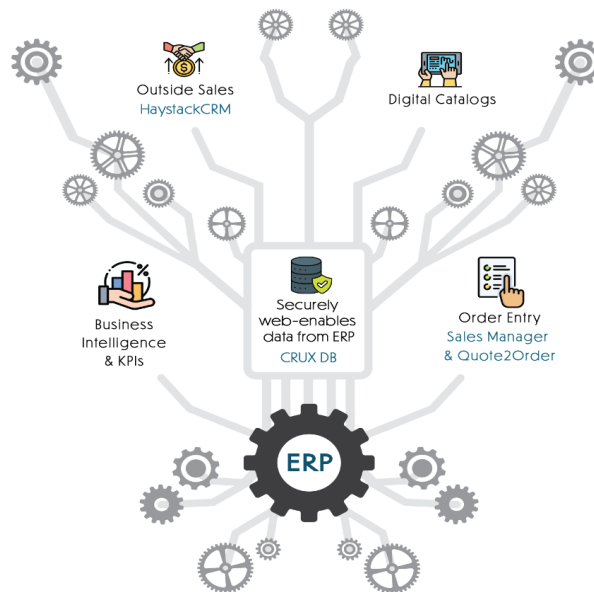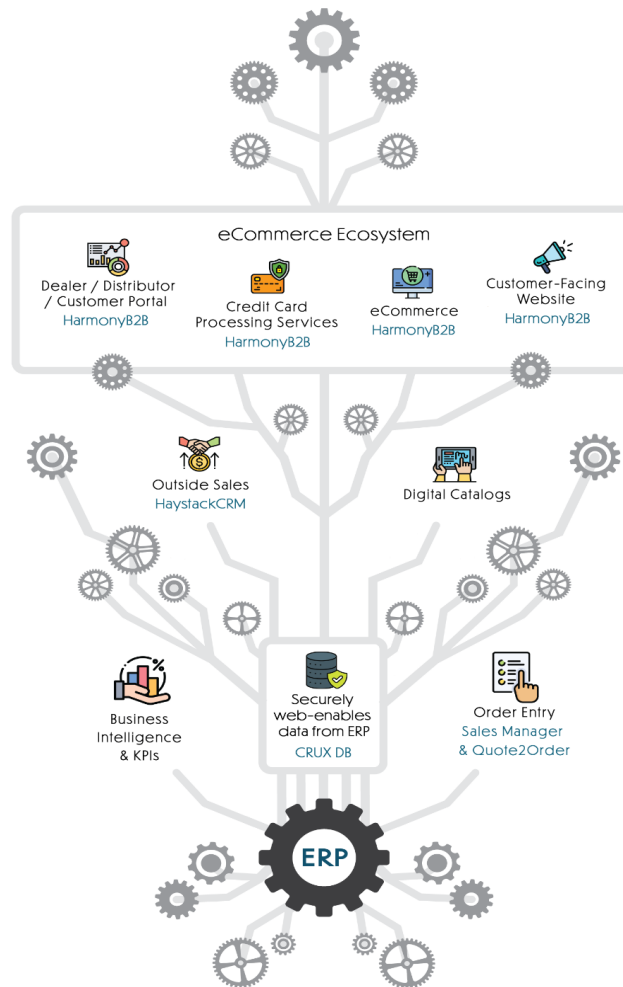# eCommerce Ecosystem

eCommerce Ecosystem

Sales Manager Demo

Questions ?

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