Metal Sales

Date: 1/12/24

Customer Metal Market 6.0 Update Summary

MS Metal Market™

❖MS Metal Market Release 6.0 Summary

- » Close Quote
- » My Favorites List
- » Improved Edit Quote Functionality and Flow
- » Updated Quote Confirmation Box
- » Added Customer Account Information
- » Switching from Quote to Sales Order Message (and vice versa)
- » Branch Specific Settings for Custom Trim Length Options
- » Bug Fix: Set Password Errors
- » Bug Fix: Custom Trim Pricing Not Updating After Changes
- » Bug Fix: Pricing Not Updating After Switching Colors
- » Custom Trim Price Displayed as Each Unit Price
- » Bug Fix: Items Cost Rounding
- » Metal Roof Flashing Guide Image added to Home and Shop Pages
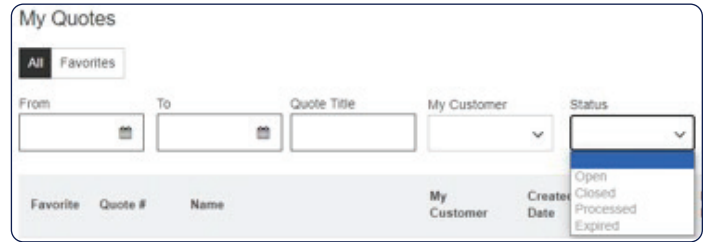- » Custom Trim Configurator Drawing Abilities Updated

CLOSE QUOTES

◆ Customer has the ability to close a quote if they know it will not be purchased or needed. Select a reason from the list – the customer can add details in the COMMENTS section
  ○ The reason and comments will be visible to Metal Sales on the Quote or reports

◆ Ability to filter Quote History page by status. Default shows all, but can filter to only see OPEN, CLOSED, PROCESSED or EXPIRED.

◆ The CLOSE QUOTE button can be found when viewing an existing quote. Either from the Quote History Page under My Account section or from the Edit Existing Quote from the main page.

MY FAVORITES LIST

◆ Customers can now create their own favorites lists. They can create as many lists as they'd like and items can be shared across multiple lists.

◆ An item can be added by opening the item in the catalog and selecting the "Add to Favorites" button.

◆ My Favorites Lists can be found under the Manage My Account box, the My Account section, or the menu categories.

◆ Some ideas this can be used for:
  ○ Stock Items list
  ○ Most Common Items list
  ○ Lists by panel such as PBR including the panel, universal ridge, PBR J-trim, PBR Gable, etc.

◆ Items from the list can be added to a cart directly from the list. You can select to add specific items or the entire list.
  ○ Once in the cart items can be configured or quantity updated. All items will initially be added with a Qty of 1. Items that need to be configured must be configured before a quote or sales order can be saved.
◆ Custom Trim Templates have been relocated to My Favorites under the My Account sections.

SITE NAVIGATION

Improved Edit Quote Function and Flow - The editing process of an existing quote has additional features.

◆ Buttons have been renamed and redirected to make the editing process more intuitive.

◆ Steps have been streamlined to reduce the amount of pages and clicks to edit a quote

◆ Buttons have been added to the View Quote page
  ○ You'll now find EDIT ITEMS, EDIT MARKUP, COPY QUOTE, CLOSE QUOTE, DOWNLOAD CSV, PRINT PDF and SUBMIT AS ORDER.

◆ The EDIT ITEMS and ITEM MARKUP have been separated out.
  ○ EDIT ITEMS now takes you directly to the cart without any additional clicks to start editing. You will later be directed to the markup page after making changes to the quote.
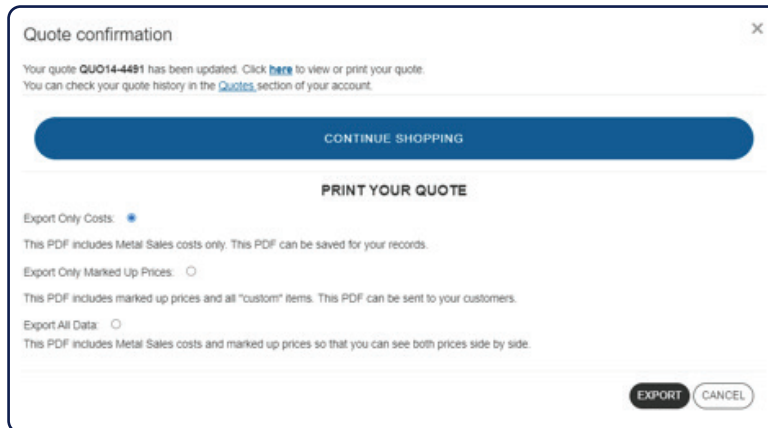 ○ ITEM MARKUP allows you to markup the items without having to go to the cart to make changes to items.

◆ When editing the items in a quote, a new button is available, ADD ITEMS, which will direct the shopper to the catalog to easily add new items to the quote.

SITE NAVIGATION (cont.)

Quote Confirmation Box

◆ This has been updated on new quotes and editing a quote.
  ○ The box now includes the quote number in place of the quote name
  ○ Removed outdated verbiage
  ○ Ability to view and print the quotes directly from the confirmation box without having to go back and open the quote

Account Information

◆ More Metal Sales contact information is visible
  ○ Sales Rep and Inside Support name and email address will be visible next to the Servicing Branch information

Switching from Quote to Sales Order or Vise-Versa

◆ If already in the path of creating a quote and the PLACE A NEW ORDER button hovered over, a message will appear notifying the customer their path will change so a Sales Order if selected.

◆ If already in the path of creating a sales order and the CREATE NEW QUOTE button is hovered over, a message will appear notifying the customer path will change to a Quote if selected.

BRANCH SPECIFIC SETTINGS FOR CUSTOM TRIM

◆ Metal Market has been updated to reflect the overall length and stretch-out limitations of your branch. It has also been updated to reflect their standard default and optional lengths.

OTHER

Set Password Error

◆ Bug Fix: When resetting a password inside NetSuite it indicated the password requirements hadn't been. This bug fix has been resolved.

Custom Trim EA Price

◆ The price shown on the Custom Trim configurator now displays the EACH price. It is also now displayed on the cart page so you can see the EACH price and the Extended Price

OTHER (cont.)

Decimal Issue In Metal Market Set Markup Page

◆ On the Set Markup page of Metal Market, it wasn't rounding to the third decimal place. This has been adjusted to match everywhere else in the system.

Metal Roof Flashing Guide Added

◆ Link to the roof graphic showing the Flashing Guide image. It is at the top near the Manage My Account section and can also be found under the Shop page above the filters.

Cart Item Details

◆ Updated and rearranged item details in an easy-to-read format and added consistency between all item types.

CUSTOM TRIM CONFIGURATOR UPDATES

♦ Ability to draw trim on a canvas in addition to the through the table.

○ Can use the table to draw from scratch or use to refine dimensions and angles

♦ Ability to draw a radial bend (button to 'Add Radial') and adjust side or length

♦ Color Side Options update

○ Update Inside/Outside to Side A/Side B

○ Removed "Bare" option on painted custom trims

○ Set "Bare" as default and only option for bare custom trims

♦ Changed Price shown to be listed as "each price" not net price

♦ Set specific Branch Rules by custom trim group

○ Default length set by branch and by item

○ Ability to set length list to choose from

○ Ability to allow or disallow custom lengths

○ Branch specific min/max length if custom length is allowed.

○ Branch specific min/max stretch-out

♦ Removed "Upload Drawing" button from Custom Trim Configurator requiring customer to create drawing.