Sterling Field Sales

Release Notes

Release 9.1

Copyright

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New Features

The following new functionalities and enhancements are provided in IBM® Sterling Field Sales, Release 9.1:

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Integration with Salesforce.com

You can now use the out-of-the-box integration solution that allows the Sterling Field Sales application to be used from within Salesforce.com. The integration solution provides a seamless user experience that has the look and feel of native Salesforce.com functionality. This integration enables customers using Salesforce.com to work on Salesforce.com opportunities in the Opportunities tab, and the associated Sterling Field Sales quotes presented in a custom Quotes tab. A custom quote lines object is presented as a Primary Quote Lines custom related list on the Salesforce.com Opportunities tab.

The integration solution provides single sign-on capability, so that users accessing Sterling Field Sales from Salesforce.com enter their user name and password in only Salesforce.com.

Support for Primary Quote

From a list of quotes within an opportunity, you can mark one of the quotes as the primary quote. The primary quote is a quote that is most likely to be accepted by the customer and get converted to an order. The details of the primary quote is used for analysis and reporting, such as revenue forecasting.

Discount Advisor

Sterling Field Sales provides a Discount Advisor. When performing price adjustments for an item, the Discount Advisor presents a graphical representation of the minimum, maximum, and average discounts and uplifts offered on an item in quotes that have been won in the past.

Customer Rating

When performing price adjustments for an item in a quote, a user can view the rating of the customer for whom the quote is created. Based on the rating, the user may decide, for example, to offer a higher discount to a customer with an excellent rating and a lower discount to a customer with a low rating. Customer Rating may also be used as a factor in Quote Approval Rules, enabling an approval workflow that includes the customer rating in decision making prior to submitting an offer to a customer.

Validating a Quote

Sterling Field Sales enables a quote to be validated to verify whether the items or the item quantity is valid for the quote. Quote validations are performed when a user performs the following tasks:

- Requests approval of a quote
- Presents a quote to a customer
- Converts a quote to an order

Marking a Note as High Priority

When adding a note, a user can now mark the note as high priority. A new check box, **Mark priority as high**, is added to the Notes dialog box. And, all the notes marked as high priority are displayed with a red border in the Notes dialog box.

User Interface Changes to Notes Dialog Box

To improve the usability of the Notes dialog box, the following user interfaces changes have been done:

- By default, all the notes added for abandon quote, present quote to customer, accept quote and reject quote actions are automatically marked as a high priority note.
- All the notes that are marked as “For internal use” only are displayed with the prefix INTERNAL USE ONLY and in red.
- The Filter By panel and the Include panel are combined into a single panel called Filter Options. The Filter Options panel is collapsible and by default, is in a collapsed view.
- Each note has a collapsible or expandable header, which displays the following details:
    - The user name of the user who entered the note along with the date and time stamp.
    - The **Note Type** for which the note was entered. For example, Request Approval Note. This information is only displayed if a **Note Type** was defined when adding the note.
- The location of the **Add Note** button is moved within the Add Note panel.

Support for Additional Browsers

In addition to Microsoft Internet Explorer and Mozilla FireFox, the following browsers are supported:

- Google Chrome
- Apple Safari

For a complete list of supported browser and browser version, refer to *Sterling Selling and Fulfillment Suite: Applications Installation Guide*.

Verifying Browser and Browser Version

The Sterling Field Sales application is enhanced to verify the user's browser and browser version. When the Sterling Field Sales application is launched, the browser and the browser version is verified against the supported browsers and browser versions. If the browser or the browser version used is not supported, a message is displayed to indicate that the used browser or the browser version is not supported, and there may be issues in the application behavior with the unsupported browser or browser version. For a complete list of supported browser and browser version, refer to *Sterling Selling and Fulfillment Suite: Applications Installation Guide*.

Additional View for Price Breakdown Dialog Box

In the Quote details screen, a user can view the price details breakdown at both the quote level and line level by moving the mouse pointer over the Adjustment value hyperlink.

Sterling Field Sales About Box is Modified

The About Box for the Sterling Field Sales application is modified to display primary and additional information. When a user clicks the **About IBM Sterling Field Sales** link, from the **Help** menu, the About IBM Sterling Field Sales dialog box is displayed with information such as the application name and version, the Sterling Commerce, an IBM® Company logo, and the copyright notice. To view the additional information such as name and version number of other Sterling Commerce, an IBM® Company applications installed, the user can click the **Additional Information** button in the About IBM Sterling Field Sales dialog box.

Localizing Item Descriptions

In Sterling Field Sales, localization of the following fields is enabled:

- Short Description for Item Attributes
- Long Description for Item Attributes
- Short Description for Item Attributes Value
- Long Description for Item Attributes Value
- Item Short Description
- Item Description

Known Issues

This topic describes the known issues that you may encounter when using Sterling Field Sales, Release 9.1.

Quote Management

You may encounter the following issues when managing the Quote module in Sterling Field Sales:

- **227683** – If the user's currency is different from the enteprise currency, then the Customer Rating Details graph is displayed in the user's currency instead of the enterprise currency.

  Solution/Workaround: None.

- **230587** – When a price adjustment is added, a new line is added to the adjustment table and the cursor is automatically placed in the adjustment column. Now, if you click **Save**, a run time error may be displayed in the Microsoft Internet Explorer browser.

  Solution/Workaround: When you are using the Microsoft Internet Explorer browser, you must tab out from the adjustment column before clicking **Save**.

- **242073** – When a quote is converted to an order, the status of all the alternate quotes in the opportunity is automatically modified to **Abandoned**. However, the Item Quantity for the lines in these **Abandoned** quotes does not change to zero. Note that this does not impact the quote workflow.

  Solution/Workaround: None.

- **242135** – If a quote has recommended items, which are related items of the quote items, the quote cannot be converted to an order.

  Solution/Workaround: All the recommended lines in the quote must be removed before converting the quote to an order.

Miscellaneous

You may encounter the following issues when using the Sterling Field Sales application:

- **209536** – Computed values might not be displayed with the correct decimal precision. For example, if the result of a calculation is 2, and amount field supports 4 decimal digit, then in the UI the value displayed is 2, rather than 2.0000.

  Solution/Workaround: None.

- **214434** – When you launch IBM® Sterling Item Configurator to reconfigure a bundle item, no indicator is displayed for the screen loading.

  Solution/Workaround: None.

- **232247** – After you click the **Customize** link on the Homepage, if you click the **Show Homepage** link without adding or removing dashlets, a truncated homepage is displayed.

  Solution/Workaround: Refresh the screen by either clicking the **Home** tab, or press F5 on the keyboard.

- **240576** – When the application is deployed and run on JBoss application server, “Cannot add class” warnings are recorded in the application server logs.

  Solution/Workaround: None.

- **242195** – If a variation item does not have any variations configured in IBM® Sterling Business Center, and you access the item details of the same item in Sterling Field Sales, a null pointer exception is recorded in the log.

  Solution/Workaround: Ensure all the variation items have variations configured in Sterling Business Center.

- **242445** – From the Quote Summary or Opportunity Details screen, click **View/Add Notes**. The Notes dialog box is displayed. Enter a note, and click **Save**. Now, enter another note, and click **Close** without saving your changes. A message is displayed indicating that you have not saved your changes. However, when the message is displayed the notes dialog box closes automatically without saving your changes.

  Solution/Workaround: None.

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