

Fwd: Spoke too soon on proposal dates...

1 message

Samantha Stawicki Kodra <samantha@imobilesupport.com>
To: June Getzinger <june@imobilesupport.com>

Tue, May 3, 2022 at 3:48 PM

Hi June,

Just an update on the discussion we had this morning about manual proposal dates. We went back to Option 1 (sticky manual dates). See discussion below.

Sam

Samantha (Stawicki) Kodra
Lead Software Developer
Intelligent Mobile Support, Inc.
Creators of **Sales Builder Pro**
(888) 980-9119 Ext. 704

----- Forwarded message -----

From: **John Steidley** <jws@imobilesupport.com>
Date: Tue, May 3, 2022 at 3:36 PM
Subject: Re: Spoke too soon on proposal dates...
To: Samantha Stawicki Kodra <samantha@imobilesupport.com>

OK doing it now is off the table as "... if we must do it now, I would estimate the scope creep to be 1-2 days."

There is no perfect solution to this edge cast, but the good news is we are making it better.

So, I am OK with your latest recommendation. Go for it!

Best regards,
John Steidley
CEO & Founder
Intelligent Mobile Support, Inc.
Creators of **Sales Builder Pro**
28420 Blue Pond Trail
Solon, OH 44139
Cell: (203) 464-2911

On Tue, May 3, 2022 at 3:08 PM Samantha Stawicki Kodra <samantha@imobilesupport.com> wrote:

I'm not sure I like the idea of having the date editable on the back office deal view. It would clutter up the clean UI, and also I don't see many people using it. I think if it were to go anywhere, it would be on Sales Builder Pro Online - where they can change anything on the proposal. But if we must do it now, I would estimate the scope creep to be 1-2 days.

What do you think about the following solution instead?

If we go with option 1 (sticky manual date), then we can show an indicator on the Customer tab on the app that shows it's a manual date. Like a warning icon, or label, or something of that sort. So they no longer need to remember it's a manual date. If they revise the quote they will see that the date didn't change, then can go back and adjust the date to today's date if the promo no longer applies. Technically, what harm is it doing if the date sticks? The main thing is that you need to remove the promo, not change the date. So with this solution, the manual date will stick on the back office deal view as well. No need to reset to today's date when accepting the proposal. If the promo no longer applies, you need the sales rep to do a requote anyway, so you wouldn't accept the deal.

Samantha (Stawicki) Kodra
Lead Software Developer
Intelligent Mobile Support, Inc.
Creators of **Sales Builder Pro**
(888) 980-9119 Ext. 704

On Tue, May 3, 2022 at 2:34 PM John Steidley <jws@imobilesupport.com> wrote:

Hmmm ...

in addition to a publish, what would Task #2 require ... Allow back office users to set the date on the deal page (scope creep)

Best regards,
John Steidley
CEO & Founder
Intelligent Mobile Support, Inc.
Creators of **Sales Builder Pro**
28420 Blue Pond Trail
Solon, OH 44139
Cell: (203) 464-2911

On Tue, May 3, 2022 at 2:24 PM Samantha Stawicki Kodra <samantha@imobilesupport.com> wrote:

Hi John,

It just occurred to me -- if the back office user is accepting a proposal in the back office, it does create a revision. So, it would reset to the current date with our Option 2 solution. However, there is NO way for them to manually change the date back.

...so we need to make yet another decision:

1. Go with option 1 instead: manual dates will be sticky on all future revisions
2. Allow back office users to set the date on the deal page (scope creep)
3. Do nothing - no manual dates on office view: date hacks can only be done in-app, not in the office. If you need to accept a proposal with a date hack, the date must be adjusted on the app on the revision, then accepted by the sales rep

Samantha (Stawicki) Kodra
Lead Software Developer
Intelligent Mobile Support, Inc.
Creators of **Sales Builder Pro**
(888) 980-9119 Ext. 704