MiTek®

SALES SIMPLICITY

Sales Simplicity X Release Notes – Version 21.0

Original Release Date – January 2021

All new features included in this release are referring to Sales Simplicity X. If you are still accessing Sales Simplicity via the Legacy application, please note that Legacy no longer receives any updates and support for the Legacy system is being phased out. Some of these new features only apply to our Subscription users, which are all listed under the separate "Subscription Environments Only" category (if applicable). Please contact the Professional Services Department at account@salessimplicity.com for additional information or training on the functionality of these new features, or for information about switching to Subscription. If you are unable to see any newly added tab, make sure they are turned on in your User Settings and that you and your users have access to it. Bug fixes that were resolved in this release will be marked in the Support tickets that have been submitted and may not be included in this release notes document.

New Features

Quote System – Customer Section

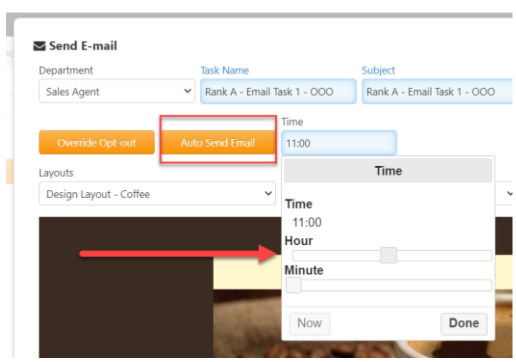
- Within the Customer section, a new system has been implemented to allow quotes to be issued for option selection quotes. This allows users to issue price quotes on option selections for a pre-determined number of days (set in Subdivision > Setup) and maintains pricing on options for a specified number of days on the customer record. A printed option sheet can be handed to the customer for their records. This allows builders to honor option pricing for a set time period allowing for builders to be more efficient without being forced to manually override potential pricing changes later in the sales process.

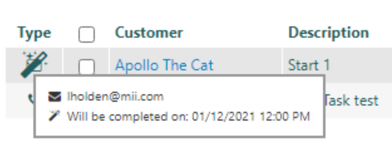
Customer Marketing

- A new field has been added to allow the user to specify what email address a customer marketing email blast is coming from, either by typing the email address manually or by using a merge field (example – using the merge field to pull the Sales Agent's email address).
  - *Note – This will default to the user that is currently logged in.*
- Additional text formatting tools have been added into the Customer Marketing tool to help make email blasts more personalized.
- Email blasts from Customer Marketing can now be scheduled to begin sending at a specific date and time. Viewing scheduled email blasts can be done in the Email Stats tab.
  - *Note – To ensure this feature works properly, make sure time zones are selected in the user's profile. Selecting a time for an email blast to be sent is done in 24-hour format.*
- Additional features have been added for users to exclude Buyers and Homeowners from email blasts in Customer Marketing.

Follow Up and Follow Up Admin

- Administrators can set certain email tasks in follow up campaigns to be automatically completed at certain date intervals and times. The task will still display within the assigned users To Do Suite, but with a different icon  to indicate that the task will automatically complete. Users can still manually complete the task if needed.

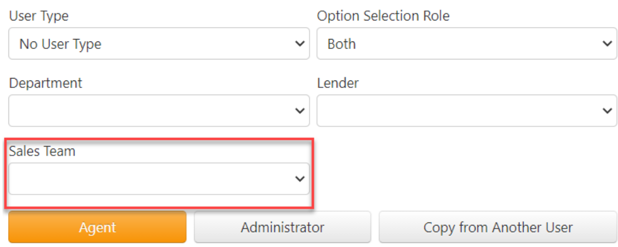




When hovered over the icon, information will display about the time the email will send.

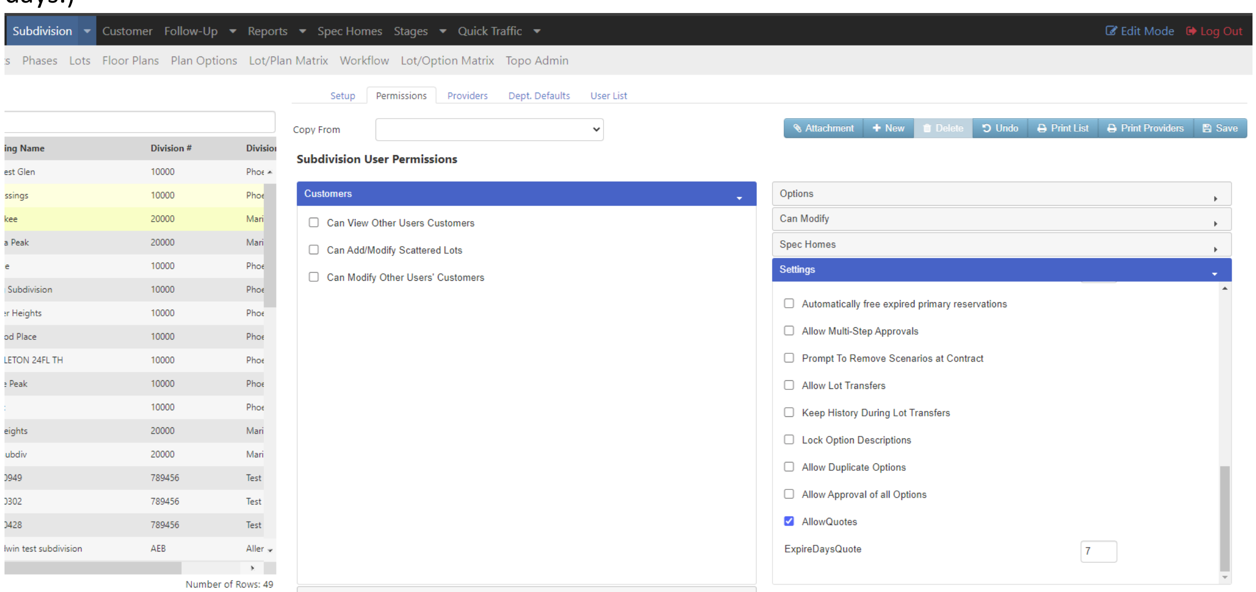
Builder

- In the Users tab, an additional feature has been added to user permissions called Sales Team. Administrators can create sales teams within Builder > Field Labels, then assign users to a sales team in Builder > Users. This allows users within a sales team to view and modify customers that are assigned to others within their team (regardless of other access permissions), but not within the rest of the company.



Subdivision

- A user (with the correct administrative permissions) can enable the quote system (described above) by checking the setting **AllowQuotes**. This will also need to specify a number of days in the **Expiredaysquote** field. (Example - If a user enters 7, quoted option pricing will be held for 7 days.)



- In the Topo Admin tool, Additional parameters have been added to allow users to hide sold lots and total prices for sold lots.
  - HideSold = **YES**
    - When marked as YES, this field hides sold/closed lots from the topo map.
  - ShowTotalPriceSold = **NO**
    - When marked as NO, sold/closed lots will no longer display their total price. This is best used if you are displaying the total price on your lots but just want to hide any lot that has sold.

Resolved Issues

Users

Issue/Resolution: In certain cases, users using Sales Simplicity in multiple web browser tabs may be logged out unexpectedly. This issue has been resolved to prevent users from being unexpectedly logged out of the system.

Division

Issue: Division > Master Options was not able to process searching for specific options, causing the page to time out. Navigating away from the page to reload it was also not loading.

Resolution: Division > Master Options is now processing searches for specific options without timing out.

Subdivision

Issue: Subdivision > Plan Options was not able to process searching for specific options, causing the page to time out and not load any data. Navigating away from the page to reload it was also not loading.

Resolution: Subdivision > Plan Options is now processing searches for specific options without timing out.

Lots

Issue: In specific cases of customers having more than one scenario, Customer reserved lots can get separated from a customer record. This meant the lot was locked from letting other users select the lot.

Resolution: When going to contract on one scenario and deleting all other scenarios, the user will be prompted if any of the scenarios have a lot reservation that needs to be removed prior to deletion.

Excel Imports

Issue/Resolution: The Subdivision Plan Options Excel Import, in some cases, was not properly uploading or updating data. This is now working as intended.