Week of: 05/20/24

Q: If both name and email are misspelled, will it still yield any previous customer info or not at all?

A: Yes, even in an instance where the name is misspelled, the system is still able to find the account and generate search results!

Q: What is the reason for changing some of the wording we use today. Example: Shipping (today we use Delivery) and Relocation (today we say Inter-franchise but to a customer we would say long distance move)

A: Great question! The goal with some of the terminology adjustments is to include more customer friendly language, so systems help convey information in words that customer would understand vs. internal PODS language

Q: Understood, but would that confuse our Local customers that are not shipping a container?

A: I can see what you mean for the address - the shipping address field shown in search is the address denoted as the primary address for an account, so we can look to rename as Primary Address (most often the origin address, but not always)

Q: The quote number is only five digits. What happens when we hit 100k?

A: Quote numbers will elongate as the number of quotes created grows!

Q: Will delete be an open option for everyone with access to the quote screen?

A: Will vary by permissions - we are demo-ing with admin access, so no a standard permission set should not be able to delete quotes

Q: It was mentioned that quotes will live on in SF after expiration. How long will that be?

A: If the quote converts to an order the quote will remain visible for the duration of that order + 6 months after order close. If the quote does not convert to an order, the quote will be visible

for 6 months for reference in the event the customer calls back in we have that history of past interactions

Q: Is Sheer ID going to be integrated with Salesforce?

A: Moving away from SheerID, however discussions in progress if needed to embed into POET

Q: If a customer initiates a quote on the web, will it appear on the Salesforce account page?

A: Yes, you will be able to see which channel the quote started on. This will eliminate the P-Quote process today where we have to repeat quoting activities

Q: If we are dealing with a legacy account, will they have a legacy quote / order numbers (i.e., will things that are customer facing stay the same)

A: TBD. There will be a translation effort to make all customer-facing items stay consistent, even if that means it will be in a slightly different format

Q: Will everyone be able to edit the account owner and sensitive other fields?

A: We are demo-ing in a test environment where the account has no restrictions or permission sets. In the actual system, permission sets to perform actions such as editing the account owner will only be granted to certain teams/individuals

Q: With POET - is the Logistics team going to keep using TMW in conjunction with POET to ship orders, or is their systems going to be in POET as well? Their system where they book the trucks for the long distance orders...

A: TMW will continue to be the primary system for long distance transit. Logistics will have access to POET to review accounts/order information but information will flow down to TMW

Q: Currently in OE now when we select the Service Date in OE the date automatically fills in but that date could be sold out or a date we don't service on. Is this going to change in POET if we select a move line it doesn't populate a date automatically and allows us to put in the date.

A: Dates will not pre-populate, the associate will need to select the date from the calendar for something to appear in that field. Something we did hear in usability testing and that the team is working toward for the calendar is if I schedule my Initial Delivery for September 1 and then I go to schedule the Return to Warehouse, I want the calendar to start at September 1 so I don't have to scroll through all the months again

Q: I have a question about the available job calendar communications between RBMS and POET. Will POET be looking at the available opportunities on the container/job level or on the order level. The question is in regards to the event that multiple containers are booked for one order.

A: The availability check will confirm that the containers requested are available and if in a rare instance if only 1 of 2 16 ft containers requested are available, it will show that 1/2 are available so the agent can either proceed to quote/book 1 container or recommend an alternative like 1 16 ft and 2 8 ft

Q: I appreciate the feedback but I believe that is referencing container availability based on inventory. My question was about Calendar availability. If a Market has the capacity to service 100 jobs/containers in a day. 99 of those are booked. And an order is placed for but for 4 containers that would exceed the 100 job/container capacity (103). However if POET is looking at the Calendar based on order availability it would see that there is actual availability and therefore putting stress on the market to exceed their capacity because the Calendar looked at the order and not the job/containers available

A: It will be at the container level, not the order level

Q: on the same track of availability of containers.....will this also be for Commercial Containers?

A: Yes, includes the all steel