JULY, 2024

POET'S CORNER

Pricing & Order Entry Transformation

NEWSLETTER

Summer's winding down, but POET's development is heating up! We're charging ahead with exciting new developments and enhancements.

THIS MONTH'S MUST-READS:

- ☑ **POET Perks:** Level up your sales with new POET features!
- ☑ **IT Insider Scoop:** Get the lowdown from IT on how CPQ will supercharge your work.
- ☑ **Salesforce CPQ Demo:** Learn how to find customer accounts in a flash!

Virtual Scavenger Hunt

HOW MANY POET GO-LIVE MODULES ARE THERE?

Send your answer to POET@pods.com for a chance to win 100 Blue Door coins!

POET Program Update

NEED-TO-KNOWS

Important

POET's official launch date for both residential and commercial is now January 25, 2025. Unifying our residential and commercial efforts will streamline operations and achieve a strong finish in 2024 for both our business and technology teams. Updated training, guides, documentation and information will be provided in the coming months.

New POET Perks to Help You Close More Deals

- **Crystal-Clear Disclosures:** Easy-to-spot indicators ensure you never miss a disclosure.
- **Alert & Fix:** Catch errors before they happen with handy alerts and notifications.
- **Promo Power:** Apply promotions on the fly to sweeten the deal for customers.
- **Agent Adjustments:** Offer discounts within limits to close the sale.
- **Search Savvy:** Always look for existing accounts, even if customers say they're new.

Your Voice Matters!

Let's build POET together! We need your questions and ideas – send them to POET@PODS.com. All questions and answers will be posted on the POET Resource Center Q&A tab.

Q: As the current leader of Sales Chat my concern is how POET will work with our current chat environment. My agents can have 3 live chats at a time on one screen and then 3 OE on their second screen. This way they can see the price and conversation at the same time. We need to collaborate on options on this. It should be seamless for chat considering we already work inside of SF. Thank you! You're great!

A: Chat is still being designed, but there will still be multiple tabs in the future (one for the chat and one for the configuration) while the agents support the customers. For additional requirements, we can prioritize these in our development backlog.

POET 101

- **POET (Price and Order Entry Transformation)** is the *project* that is building a cutting-edge Salesforce and PROS environment to replace Order Entry
- **Salesforce CPQ (Configure, Price, Quote)** is the *tool* that you'll use to place and modify residential and commercial customer orders

IT Says CPQ Rocks!

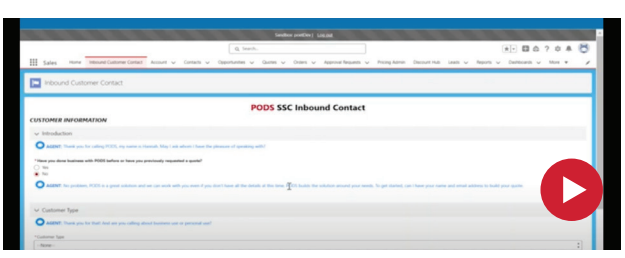
Watch Randy Withrow from our IT Enterprise Applications team explain how CPQ boosts your agent skills and creates a smoother customer experience.



POET Spotlight

CPQ SEARCH: EASY AS 1-2-3!

This quick demo shows you how to find customer accounts with ease in Salesforce CPQ.



Milestones

Recently Completed Milestones:

- July Usability Testing sessions
- Trainer 'Practice with POET' session

Upcoming POET Milestones:

- August Change Network meeting
- SSC End-User 'Practice with POET' session

June's Blue Door Coin Winners!

Tim Meschede — POET Acronym Winner!

Jennifer Williams — True or False Winner!

PODS®

Need More?

POET Resource Center: Your one-stop shop for training, contact info for superusers, and Change Champions.

Got questions? Shoot us an email at **POET@PODS.com**. We'll answer and post your Q&A on the POET Resource Center!