

COMPAS Go

Read Me Notes March 2019
Account Enhancement

Account Enhancement



COMPAS Go incorporates fields that require users inputs and can be saved as Recent Searched account.

They are:

- ✓ Sold to Account
- ✓ OEM/SYSINT
- ✓ End User
- ✓ Consultant
- ✓ Competitor
- ✓ Contractor

Sold To Account *

Job Name *

Quote Name *

Create Reset

Opportunity

PHILOS Opp Id

PHILOS Quote Id

Owner Email Id *

Market Segment

Estimated Order Intake(OI) Date

Primary

OEM/SYSINT

End User

Consultant

Competitor

Contractor

Create Opportunity

Account Enhancements



COMPAS Go requires users inputs. “Sold to Account”

The Sold to Account has a “Pen”  Icon to open the search window and includes a Clock icon.  The Clock icon will show the Recently (Searched) Used Sold To Account List. The Pen is for searching the Sold to Account. The Clock will be the location of searched-saved Sold to Account(s). Example: Searched for “A”. Click on “Select” to add to quote and Recently Used List. Use the Recently Used list for future account selections.

Note: Users with multiple accounts have to search for each account. Each search account needs to be added to the quote once to be added to Recently Account List. **Hint:** Do not enter any account information. Just click on “Search” and the list of accounts assigned to you will be listed. Users still need to select each Sold To Account. The Sold to Account in the quote will show the one selected. Do this for each account “once” for setting up your Recently Used Sold to Account list. .

Sr.No	Name	Account Number	City	State	Zip	Country	
1	AIR LIQUIDE AMERICA		LA PORTE	TX	77571	US	Select
2	AMCOR FLEXIBLES NORTH AMERICA		HAGERSTOWN	MD	21740	US	Select
3	ARCELORMITTAL TAILOR BLANKS AMERICA CORP		PIONEER	OH	43554	US	Select

3 S INC OAK CREEK WI US 53154	Select	Delete
3M COMPANY HUTCHINSON MN US 55350-2900	Select	Delete
1257162 ONTARIO LTD TORONTO ON CA M5A 3C7	Select	Delete

Account Enhancements



The Opportunity entries provides the same type of searching.

Opportunity		
PHILOS Opp Id	PHILOS Quote Id	Owner Email Id *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Market Segment	Estimated Order Intake(OI) Date	Create Opportunity
<input type="text"/>	<input type="text"/>	
Primary	OEM/SY SINT	End User
<input type="text"/>	<input type="text"/>	<input type="text"/>
Consultant	Competitor	Contractor
<input type="text"/>	<input type="text"/>	<input type="text"/>

Note: The existing searchable fields will carry over to your Recently Searched accounts. Click on the Clock to make a selection from the list. The limit of accounts for each searchable field will be limited to 20 accounts. Adding a new one will drop of the oldest account.

Account Enhancements



Submitting for Price Approval has the same Account enhancement. Remember only Market Segment is required for price approval.

Quote Details

Market Segment *

Competitor

  

End User

  

Contractor

  

Consultant

  

Account Enhancements



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Submitting for Order Entry has lines using the same Account enhancement.

Consultant (*):	<input type="text"/>	 
Competitor (*):	<input type="text"/>	 
End User (*):	<input type="text"/>	 
Contractor (*):	<input type="text"/>	 

Note: Depending on the quote type, filling in the Opportunity information in the Quote Details will populate the selections to the corresponding cells in the different locations in the quote to order process.

Account Enhancements



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These new Account Enhancements is just another step in the ongoing work done by the COMPAS Team.

Thank You.

Mark Kossbiel
COMPAS Marketing Manager