

What's New in ESP

2020-04-01 - Jennifer M - What's New in ESP

ESP Web Updates

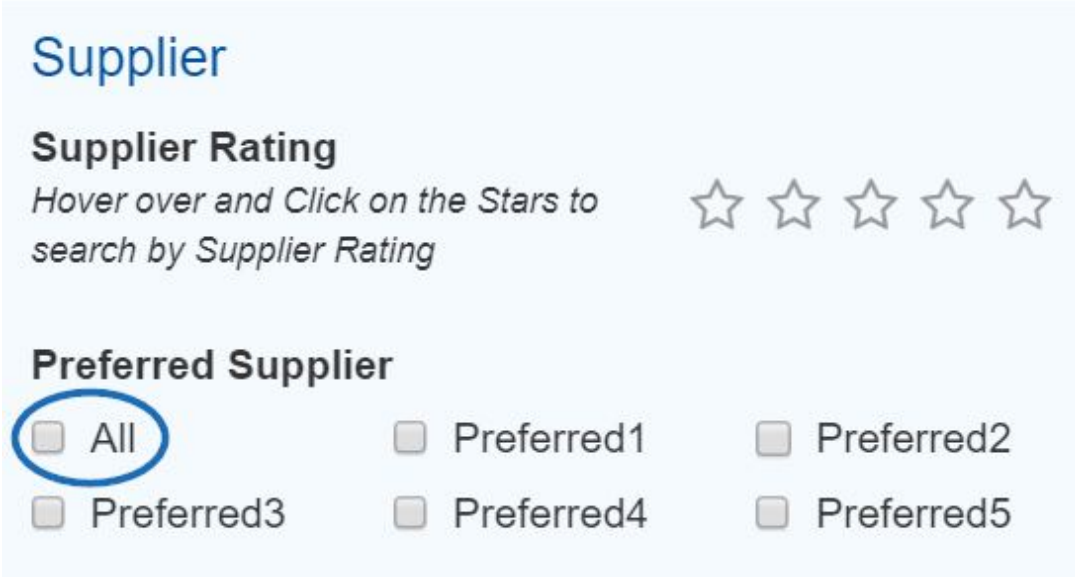
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CRM Updates

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Ability to Search "ALL" Preferred Suppliers

In the Advanced Search sections for both Products and Suppliers, you now have the ability to select "ALL" in the Preferred Suppliers section. By selecting "ALL", results will include every level of preferred suppliers.



The screenshot shows a light blue interface for selecting supplier preferences. At the top, the word "Supplier" is in a large blue font. Below it, the "Supplier Rating" section includes the text "Hover over and Click on the Stars to search by Supplier Rating" and five empty star icons. The "Preferred Supplier" section contains six radio button options: "All", "Preferred1", "Preferred2", "Preferred3", "Preferred4", and "Preferred5". The "All" option is circled with a blue line.

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New Supplier FOB Point Search

In the Supplier Advanced Search section, there is a section available to search using a Freight On Board (FOB) point. It is important to keep in mind that suppliers may have multiple FOB points. Any supplier which has at least one FOB point matching the search

criteria will be displayed.

FOB/Shipping Point(s)
Locations where your products ship from

Distance in Miles

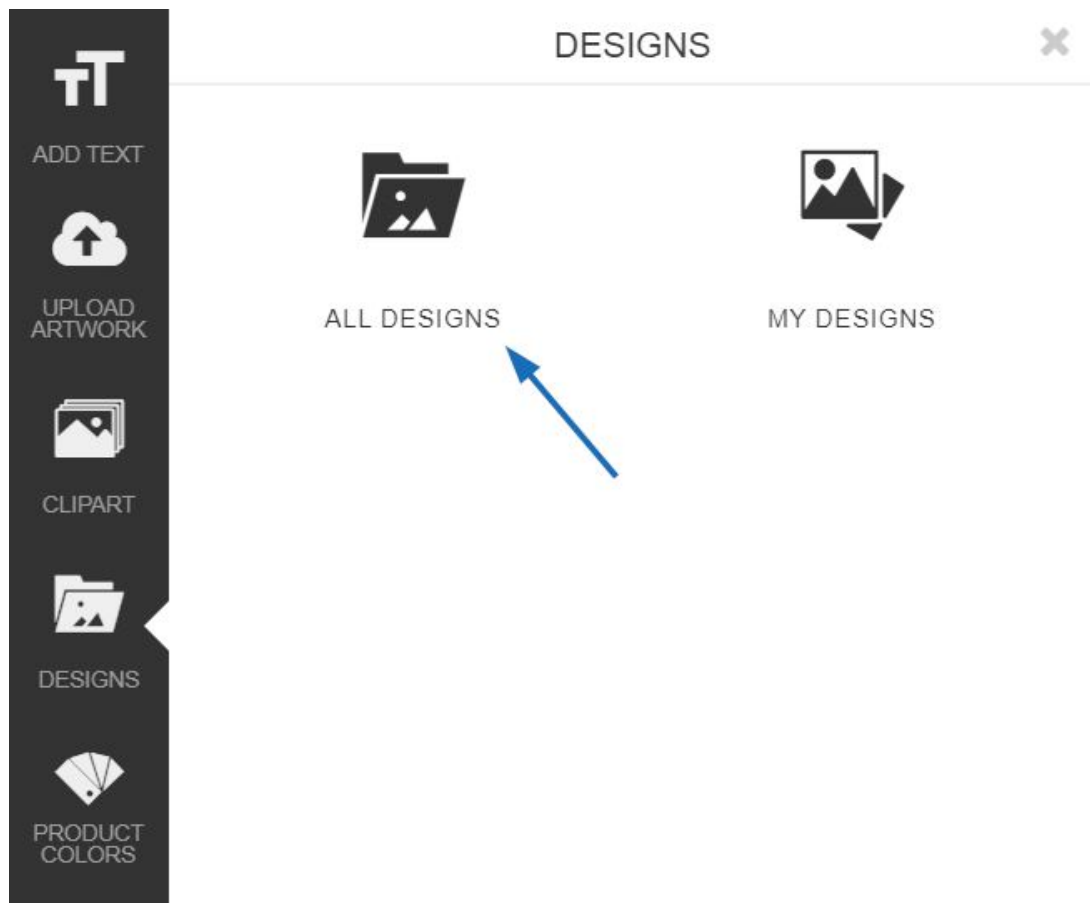
From

Zip/Postal Code

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Share Virtual Sample Designs

Virtual samples designs can now be shared and utilized by all users within the Design Studio. In the Designs section, there are two folders: All Designs and My Designs which contain keyword search capabilities. The All Designs folder contains virtual sample designs created by both the individual and all users within the company. The My Designs folder will only display designs created by the individual user.

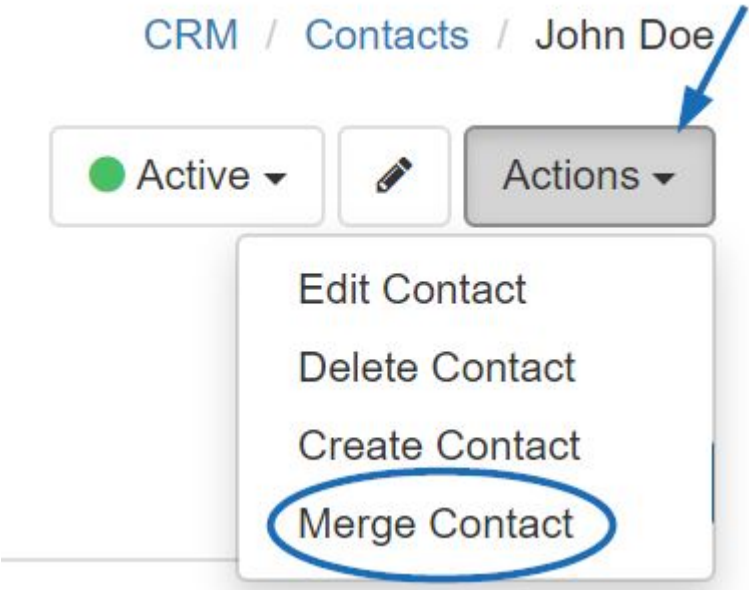


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Merge Duplicate Contacts

Within CRM, you are now able to merge duplicate contacts into one. For example, a user

has two contact records for the same person. After locating one record and clicking on the customer's name to open it, they can use the Actions to select "Merge Contact".



Next, in the Merge Contacts window, use the Contact B field to locate the second, duplicate contact. After reviewing the information for each contact, the user can then select which contact (A or B) should be the main contact.

Merge Contact

All information will combine into one single record. No contact information, presentations, orders, emails, notes and tasks will be lost.

Contact A

John Doe

Primary

John Doe
4800 Street Rd
Feasterville-Trevose, PA
19053
United States

555-555-5555
jdoe@abc.com

Contact B

Select a contact to merge with

Select Contact

Cancel

Merge Contacts

When merging contacts, there are three key aspects:

- This is a permanent action and cannot be undone.

- By choosing to merge into a contact, if information exists for the same field in both contacts, only the information from the main contact will remain after the merge. In other words, let's say both contacts contained address information, but the user has selected to merge Contact A into Contact B. After the merge is complete, the address information will reflect what had been entered for Contact B.
- If one contact contains information that the other did not have, then it will be added during the merging process.

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