

SedonaOffice®

SalesAutomation • eForms • ePayments



Three Time-saving Solutions to Automate Your Workflow

Manual processes and paperwork can slow you down and increase the risk of errors. You can work smarter and faster by automating your workflow processes and eliminating physical paperwork.

SalesAutomation, eForms, and ePayments are three impressive extensions for SedonaOffice or AlarmBiller that work together or alone to help you take your business to the next level. When you manage lead development, customer lifecycle, reporting, billing, and documentation electronically, you make these vital tasks far easier to execute and track for your team, you look more professional to your customers, and you make it easier to do business with your company.

SalesAutomation

Manage prospects through the pipeline

This powerful tool creates and manages leads, provides estimates, and generates proposals, taking you through the complete sales process and customer life cycle. Automation eliminates repetitive tasks, increases productivity, and reduces errors. The SalesAutomation module is packed with the features and functionality you need. Use SalesAutomation with eForms to send proposals to prospects and obtain electronic signatures in seconds!

Drive leads, and manage prospects and sales proposals

- Monitor leads, create estimates, generate proposals, close sales, and collect e-signatures. As a bonus, your sales leads are automatically converted to customers when your company makes a sale.
- Use filters to sort current customers for possible upsells or generate a list of potential customers to pursue as sales leads – keeping sales teams organized, informed, and focused on selling.
- Manage costs and gross margins on sales proposals with the powerful ability to forecast and manage risk and net return.
- Do it all on the road: accessing information from your mobile device saves you time and money.

Simplify sales planning and strengthen strategy

- Forecast future sales using one of the best methods: by reviewing past sales and growth trends. Understand economic and technology movements in your segment and know if you're on track or need to pivot.
- Save time and money and drive brand awareness by automating valuable emails like reminders and new offerings.

Improve account management

- Maintain accurate lead, sale, transaction, and customer data. View complete account information with related contacts, contracts, cases, opportunities, and more. Track the status of leads and sales in progress, view past sales history, and gauge the probability of closing the next deal.
- Automatically generate statistics that are important for future sales. A great benefit is to have as much knowledge about a current or prospective customer to help you better tailor your offerings to their needs.

eForms

Send, sign and store authorizations online

Create custom forms, collect e-signatures in the field, and get paid faster. eForms is the premier turnkey system to help your business centralize and manage any document requiring customer authorization – including existing PDF documents. eForms also includes automated workflow management so you can follow your form from ‘sent’ to ‘signed.’

Create and Edit Documents with Ease

- Create, maintain and access ongoing contractual agreements with customers, while keeping customer-specific details at your fingertips.
- Attach eForms documents directly to customer records within SedonaOffice or AlarmBiller. You can integrate forms with the sales lead management system or back-office ERP (Enterprise Resource Planning) system. Finally! A single document source to track and maintain, saving time and reducing input errors associated with unintended multiple versions of the same document.

ePayments

Collect payments on electronic forms with 100% PCI compliance transactions.

No more writing down customer credit card info for later input – get signed, PCI-compliant payment information, and deliver it electronically to the office. Create, attach, and manage financial and billing-related documents for customer accounts. This electronic accountability and financial document management helps better support customers.

Securely Store CC and ACH Information

- Customers need options that best fit their financial needs – the ability to offer and maintain credit card and ACH options benefits you and your customers.
- Reduce risk with a PCI (Payment Card Industry) -compliant solution.
- 100% PCI compliant transactions build trust with customers and reduce the risk of an embarrassing financial data breach that puts your customers in a tough spot and your company at risk of fines.

It's time to work smarter and faster, with simplified processes and digital solutions that help take your business to the next level.



Bold Group has provided award-winning, trusted business solutions for the security industry for over three decades. Our core products, stages®, Manitou®, SIMS®, SedonaOffice®, and AlarmBiller® are the leading software choices for top security companies and dealers globally. To learn how to increase profitability and efficiency for your business with our full range of alarm monitoring, Security Intelligence, and integrated financial management solutions, call us or visit our website.

BOLD
GROUP

800-255-BOLD
boldgroup.com
boldsales@boldgroup.com