

# AlarmBiller Features - Items/Parts

12/18/2023 2:43 pm EST

## Overview

This functionality lets users in SalesAutomation create a set of groups (called charges) on proposals and put both items and parts in those groups. This grouping can then be used on eForms as a method of breaking down lists of charges to the end user in a manner determined by the central station / dealer instead of just enforced by the "type" defined in AlarmBiller. It gives the ability to decide to display a sub-total for the charges groups on a selective basis.

This feature is only available on Proposals (both SA and AB), Sales Packages, and eForms. It will show up on a PDF from eForms but NOT on the standard Proposal PDF.

## Technical Information

There are two ways to create these groups:

- Define them on a Sales Package
- Create/edit them on a per-Proposal basis

In both cases, you are able to rework a combined list of containing both Items and Parts into user defined groups.

These groups are purely a UI functionality. This means that until saved, these groups only exist on the Client.

The groups can be created new or you can move to an existing group.

Items total	Parts total	Labor total	Package total
\$0.00	\$484.99	\$0.00	\$484.99

Items 2 | Parts 3 | Charges 5 | RMR 0

Reorder Groups | Ungroup All

Name	Description																																																
<div style="border: 1px solid #ccc; padding: 5px; width: fit-content; margin-bottom: 5px;">           Move to a different Group <span style="float: right;">✕</span> </div> <div style="margin-bottom: 5px;"> <span>Completion</span> <span style="font-size: small;">▼</span> </div> <div style="display: flex; justify-content: flex-end; gap: 10px;"> <span>Create New Group</span> <span>Cancel</span> <span style="background-color: #f4a460; color: white; padding: 2px 5px;">Ok</span> </div>																																																	
<table border="1" style="width:100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th>Item/Part Code</th> <th>Item/Part Description</th> <th>Q...</th> <th>Rate</th> <th></th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>= NC Labor Access</td> <td>Labor</td> <td>1</td> <td>\$0.00</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>= AlarmBiller</td> <td>AlarmBiller Services</td> <td>1</td> <td>\$0.00</td> <td>No</td> <td>\$0.00</td> <td></td> <td><span>☐</span></td> </tr> <tr> <td>= OPTAX250PLUSR</td> <td>OPAX250PLUSR 250 FT PHOTO BEA...</td> <td>1</td> <td>\$148.50</td> <td>Yes</td> <td>\$148.50</td> <td></td> <td><span>☐</span></td> </tr> <tr> <td>= BOSBLUELINEGE...</td> <td>TRITECH PET PIR</td> <td>1</td> <td>\$78.32</td> <td>Yes</td> <td>\$78.32</td> <td></td> <td><span>☐</span></td> </tr> <tr> <td>= AP633</td> <td>test</td> <td>1</td> <td>\$258.17</td> <td>Yes</td> <td>\$258.17</td> <td></td> <td><span>☐</span></td> </tr> </tbody> </table>	Item/Part Code	Item/Part Description	Q...	Rate					= NC Labor Access	Labor	1	\$0.00					= AlarmBiller	AlarmBiller Services	1	\$0.00	No	\$0.00		<span>☐</span>	= OPTAX250PLUSR	OPAX250PLUSR 250 FT PHOTO BEA...	1	\$148.50	Yes	\$148.50		<span>☐</span>	= BOSBLUELINEGE...	TRITECH PET PIR	1	\$78.32	Yes	\$78.32		<span>☐</span>	= AP633	test	1	\$258.17	Yes	\$258.17		<span>☐</span>	
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▶ Completion	Paid for upon completion of the job																																																
▶ Upfront Costs	Paid for before the work begins																																																

**Create a new Group** ✕

**Name:**

**Description:**

**Display Subtotal:**

On

Submit
Clear

Currently, each one must be moved to a group individually. The primary use case is to define a Sales Package and then if individual things are added for a unique proposal, they must be added to groups manually.

If the Display Subtotal is on, then each group will show a sub-total for that group.

Name		Description					
<div style="display: flex; justify-content: space-between;"> <span>Items <span style="border: 1px solid black; padding: 0 2px;">2</span></span> <span>Parts <span style="border: 1px solid black; padding: 0 2px;">3</span></span> <span>Charges <span style="border: 1px solid black; padding: 0 2px;">5</span></span> <span>RMR <span style="border: 1px solid black; padding: 0 2px;">0</span></span> </div>							
<div style="display: flex; justify-content: space-between;"> <span>☰ Reorder Groups</span> <span>☰ Ungroup All</span> </div>							
<div style="display: flex; justify-content: space-between;"> <span>▾ Ungrouped</span> </div>							
Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount		
<div style="display: flex; justify-content: space-between;"> <span>▾ Completion</span> <span>Paid for upon completion of the job</span> </div>							
Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount		
= NC Labor Access	Labor	1	\$0.00	Yes	\$0.00	☰ ☰	
= AlarmBiller	AlarmBiller Services	1	\$0.00	No	\$0.00	☰ ☰	
					<b>\$0.00</b>		
<div style="display: flex; justify-content: space-between;"> <span><input checked="" type="checkbox"/> Upfront Costs</span> <span>Paid for before the work begins</span> </div>							
Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount		
= OPTAX250PLUSR	OPAX250PLUSR 250 FT PHOTO BEA...	1	\$148.50	Yes	\$148.50	☰ ☰	
= BOSBLUELINEGE...	TRITECH PET PIR	1	\$78.32	Yes	\$78.32	☰ ☰	
= AP633	test	1	\$258.17	Yes	\$258.17	☰ ☰	
					<b>\$484.99</b>		

The entire group list can be reordered. Just drag/drop into the desired order.

The screenshot displays a software interface with a 'Reorder Item/Part Groups' dialog box. The dialog box contains the following options:

- Ungrouped
- Upfront Costs (highlighted in blue, with a red arrow pointing to it)
- Completion

The background interface shows a table with columns: Name, Description, Item/Part Code, Item/Part Description, Q..., and Rate. The table is organized into groups:

- Ungrouped**
- Completion** (Paid for upon completion of the job)
 

Item/Part Code	Item/Part Description	Q...	Rate
= NC Labor Access	Labor	1	\$0.00
= AlarmBillr	AlarmBillr Services	1	\$0.00
- Upfront Costs** (Paid for before the work begins)
 

Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount
= OPTAX250PLUSR	OPAX250PLUSR 250 FT PHOTO BEA...	1	\$148.50	Yes	\$148.50
= BOSBLUJLINEGE...	TRITECH PET PIR	1	\$78.32	Yes	\$78.32

Things in a group can be either moved to another group, or completely removed from the group (back to Ungrouped state). You can also Ungroup All everything.

Items Total		Parts Total		Labor Total		Package Total	
\$0.00		\$484.99		\$0.00		\$484.99	

Items		Parts		Charges		RMR	
2		3		5		0	

Name		Description	
Ungrouped			

Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount	
= OPTAX250PLUSR	OPAX250PLUSR 250 FT PHOTO BEA...	1	\$148.50	Yes	\$148.50	

Upfront Costs		Paid for before the work begins				
Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount	
= BOSBLUELINEGE...	TRITECH PET PIR	1	\$78.32	Yes	\$78.32	
= AP633	test	1	\$258.17	Yes	\$258.17	
					<b>\$336.49</b>	

Completion		Paid for upon completion of the job				
Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount	
= NC Labor Access	Labor	1	\$0.00	Yes	\$0.00	
= AlarmBiller	AlarmBiller Services	1	\$0.00	No	\$0.00	

## eForms

Proposal templates in eForms can be edited to include the groups.

**Edit**

**Name:**  
Group Test

**Description:**  
Proposal Group Test

**Type:**  
No Type

**Integration:**  
SedonaOffice

**Data Type:**  
Proposal

**Upload PDF:**  
Select files... *Drop files here to upload*

✓ Update    ⓧ Cancel

Available Forms    Edit Example Data    Preview    Save

Undo    Redo

Tools

- Text
- Picture
- Signature
- Initials
- Shape
- Checkbox
- Payment Method
- RadioButton
- Page #

Shared Data

- Customer
- Lead
- Proposal
- Charges
- Closing Date
- Closing Percent
- Contact
- Customer Id
- Customer Site Id
- Customer System Id

Charges

Description	Quantity	Rate	Amount
...	...	...	...

Charges

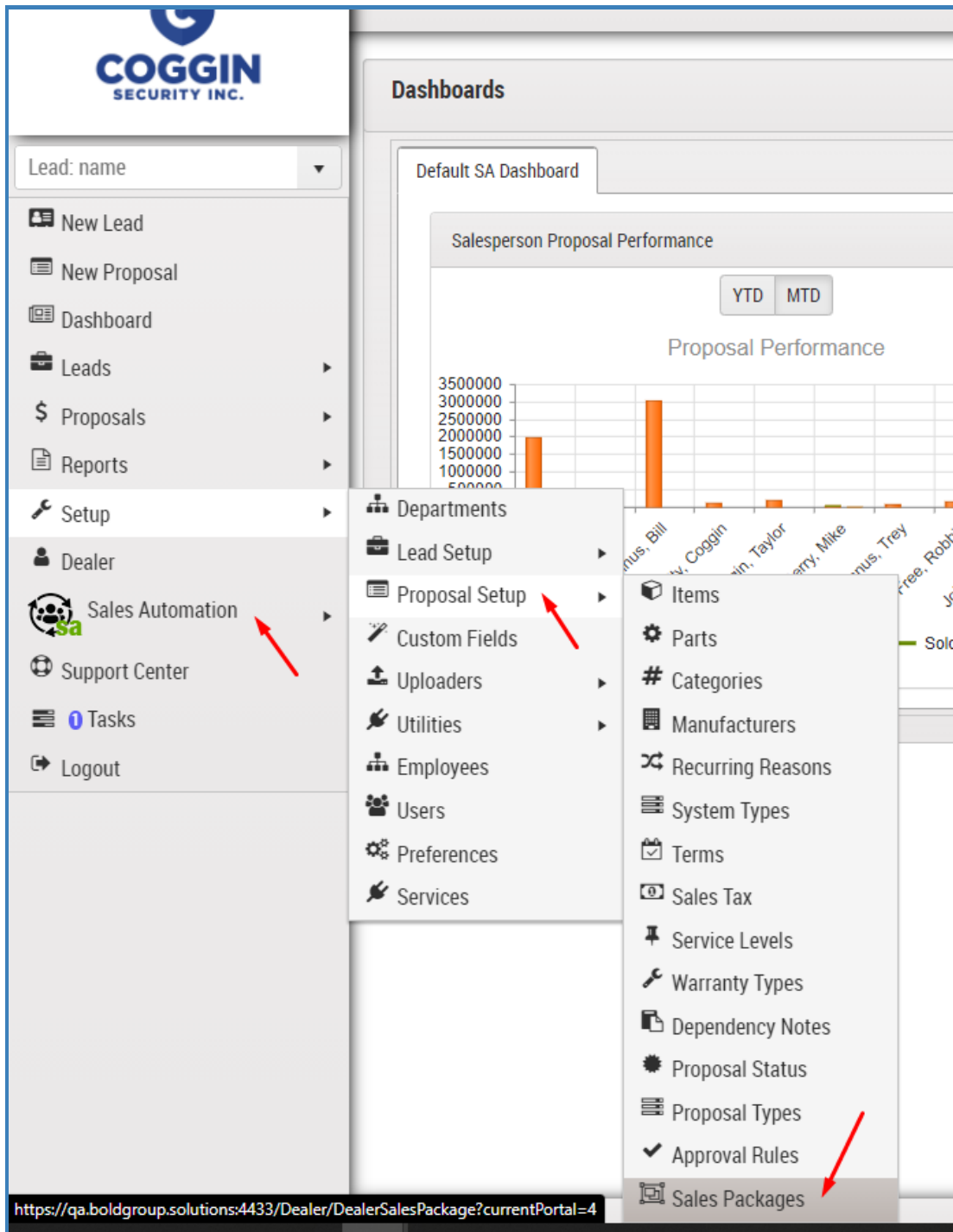
- Edit Columns
- Show Groups
- Make Full Width

## Installation

No special installation is needed. Just SalesAutomation and eForms for the full value.

## Configuration

The ideal use for this is with Sales Packages. These Charge groups can be defined and then applied to proposals easily.



First, add Items and Parts to your Sales Package. Then you can go to the Charges tab and build out a package.

They start out "Ungrouped" but you can then define the groups you want. This setup will be applied to any proposal that uses this sales package.

Items Total

\$0.00

Parts Total

\$484.99

Labor Total

\$0.00

Items <sub>2</sub> Parts <sub>3</sub> Charges <sub>5</sub> RMR <sub>0</sub>

Reorder Groups Ungroup All

Name Description

Ungrouped

	Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount	
=	NC Labor Access	Labor	1	\$0.00	Yes	\$0.00	
=	AlarmBillr	AlarmBillr Services	1	\$0.00	No	\$0.00	
=	OPTAX250PLUSR	OPAX250PLUSR 250 FT PHOTO BEA...	1	\$148.50	Yes	\$148.50	
=	BOSBLUELINEGE...	TRITECH PET PIR	1	\$78.32	Yes	\$78.32	
=	AP633	test	1	\$258.17	Yes	\$258.17	

Items 2 | Parts 3 | Charges 5 | RMR 0





☰ Reorder Groups | 🗑️ Ungroup All

Name | Description

▾ Ungrouped

Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount
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▾ Completion | Paid for upon completion of the job

Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount	
= AlarmBiller	AlarmBiller Services	1	\$0.00	No	\$0.00	 
= BOSBLUELINEGE...	TRITECH PET PIR	1	\$78.32	Yes	\$78.32	 
					<b>\$78.32</b>	

▾ Upfront Costs | Paid for before the work begins

Item/Part Code	Item/Part Description	Q...	Rate	Taxable	Amount	
= NC Labor Access	Labor	1	\$0.00	Yes	\$0.00	 
= OPTAX250PLUSR	OPAX250PLUSR 250 FT PHOTO BEA...	1	\$148.50	Yes	\$148.50	 
= AP633	test	1	\$258.17	Yes	\$258.17	 
					<b>\$406.67</b>	