

AlarmBiller Features - Alternate Descriptions

12/18/2023 3:00 pm EST

Overview

This feature allows Items and Parts to have Alternate Descriptions. These could be more user friendly descriptions compared to the Vendor description OR they can be alternate languages to support multi-lingual regions. Additionally, these fields have been added in SedonaOffice and can be brought over to SalesAutomation through SedonaCloud. Finally, these fields have been made available in eForms so that customer facing documents can take advantage of them.

Technical Information

Alternate Descriptions have been added to both AlarmBiller/SalesAutomation and the SedonaOffice/SalesAutomation products. This means it can be added to Items and Parts in two ways.

- Defined in SedonaOffice and Sync'ed over into SalesAutomation
- Defined in AlarmBiller/Sales Automation

Items have one new field called Alt Description. This also applies to Recurring Items. Parts have three new fields called Alt Part Description, Alt Sales Description, and Alt Service Description.

SedonaOffice

An alternate description can be added in SedonaOffice for Items and Parts.

Items:

Item Edit

Item Type	IPJ	Account	410310	☐ Inactive
	<i>Inventory Part-Jobs</i>		<i>Revenue - Equipment Sales</i>	☒ Taxable
Item	INVITEM101	Category	G & A	☒ Available in Sales
			<i>General Administrative</i>	
Description	This is the standard description field			☒ Available in Service
Default Rate	25.00	Job Costing	0	
		Default Cost	5.00	
		Alt Description	This is the new alternate description field for items	
Apply New Delete				

Recurring Items:

Item Edit

Item Type	RI	Account	410310	☐ Inactive
	<i>Recurring-Inspections</i>		<i>Revenue - Equipment Sales</i>	☒ Taxable
	☐ Non Deferred Income	Category	G & A	☒ Available in Sales
			<i>General Administrative</i>	
Item	RECURITEM101			
Description	this is the standard desc for items			
Default Rate	50.00	Job Costing	0	☐ Available in Service
Deferred Acct	244500	Default Cost	10.00	
	<i>Deferred Revenues*</i>	Alt Description	This is the Items new alternate description field	
				Apply New Delete

Parts:

Part Edit

Part 12349 ☐ Inactive

Description

Description	This is the standard field for part description	☐ Part Kit
Detail	Additional detail for the part can be added to this field	☐ Special Order
Product Line	Motion Detectors	☒ Customer Equipment
Manufacturer	Ademco	☒ Stock Item For Jobs
Manuf Part Code	MFG Part code can further identify the part	☐ Freeze All Purchasing
Manuf Warranty	One Year	Ship Weight
U.P.C		Labor Units
Notes	notes related to the part can also be defined	
Alt. Description	This is the new Alternate Description for the part	

Costing

Method	Average
PPV Account	120900
Direct Exp Acct	510001

AR Setup

Invoice Item	SVC Part
Income Acct	410310

Sales

Invoice Description	This is the standard field for part description	☒ Available for Sales
Price	100.0000	
Alt. Description	This is the new Sales Alternate Description field	

Service

Invoice Description	This is the invoice description field for the part	☐ Available to FSU
Price 1	100.0000	
Price 2	0.0000	
Alt. Description	This is the new Service Alternate Description field	

You then synchronize over to the SalesAutomation product through the SedonaCloud integration.

Sync Management

Use the tools on this page to manually sync records from SedonaOffice to Sales Automation in SedonaOne.

Sync All Entities

Parts

CREATED:	UPDATED:
0	0
0	0
0	0
0	0

RecurringReasons

CREATED:	UPDATED:
0	0

AlarmBiller/SalesAutomation

You can add Alternate Descriptions from the Items/Parts setup in SalesAutomation or AlarmBiller.

Items & Parts

- Items
- Parts
- Part Kits
- Categories
- Manufacturers

From there you can edit an item and add the Alternate Description.

Edit

Part Code* 5800PIRCOM

Description* WIRELESS COMMERCIAL PIR
127 characters remaining

Alt Part Description
100 characters remaining

Alt Sales Description
100 characters remaining

Alt Service Description
100 characters remaining

Manufacturer Ademco

Category Motion Detectors

Subcategory Subcategory

Dependency Note test Dependency Note
980 characters remaining

Main Vendor AA Vendor

GL Account* 55555 - parts expense GL

Default Rate* \$194.34

Cost Amount* \$78.52

Labor Units* 0.00

Barcode

☒ : Taxable ☐ : Panel

Delete Picture *Best Image Size: W:180, H:180

Select files... Drop files here to upload

Image

Once these have been added, they can be seen on a proposal. When editing the proposal, the alternate descriptions can be added/updated as well. This applies to Items, Parts, and RMR.

Proposal # 6837: Bold Technologies, LTD (Tobias Prescott) 5/11/2021 8:52:44 PM

Lead Customer Copy Edit Delete Work Order

Status: Open

Proposal Type: Standard

PO Number:

Proposal Date: 05/12/2021

Follow Up: 5/12/2021 12:00:00 AM

Closing Date: 05/12/2021

Closing %:

Contact: Bold Technologies, LTD

Phone:

Email: kathy.ackerman@boldgroup.com

Source: Social Media

Customer Site: Bold Technologies, LTD - #1

System:

Sales Tax: SC Horry County - 8.0000%

Service Level: A/V After Hours NC

Term: Net 30

Department: Sales Department

Salesperson: Mike Berry

Delivery Method: Email

Brief Description:

List Price: \$3,005.00

Discount: \$0.00

Sales Price: \$3,005.00

Tax Total: \$240.40

Proposal Total: \$3,245.40

RMR Total: \$50.00

Sales Automation

Sales Package: PKGTST1

Labor

Labor Item: I1

Labor Rate: \$125.00

Sales Price

Items: \$580.00

Parts: \$550.00

Labor: \$1,875.00

Discount: \$0.00

Sales Price: \$3,005.00

Items: 10 Parts: 10 Charges: 20 RMR: 1 Notes: 0 Docs: 0 Complete: Custom Fields: eForms: 1

Export to Excel

Count	Part Cost	Total Cost	Labor Uni...	Total Lab...	Alt Part Description	Alt Sales Description	Alt Service Description	Part Dependency Note
\$60.00	\$6.00	\$6.00	1.00	1.00	Proposal Alt Part Desc	Proposal Alt Sales Desc	Proposal Alt Service Desc	
\$20.00	\$2.00	\$2.00	1.00	1.00				

Edit Proposal # 6837: Bold Technologies, LTD (Tobias Prescott) 05/11/2021

Show Proposal Detail Cancel

List Price: \$3,005.00

Discount: \$0.00

Sales Price: \$3,005.00

Est Tax: \$240.40

Proposal Total: \$3,245.40

RMR Total: \$50.00

Sales Automation

Labor

Labor Item: I1

Labor Rate: \$125.00

Labor Cost: \$40.00

Labor Units: 15.00

Labor Units Override: 0.00

Discount

Sales Price

Items: \$580.00

Parts: \$550.00

Labor: \$1,875.00

Discount: \$0.00

Sales Price: \$3,005.00

Cost

Items: \$58.00

Parts: \$55.00

Labor: \$600.00

Items: 10 Parts: 10 Charges: 20 RMR: 1 Notes: 0 Docs: 0 Complete:

Add Parts

Cost	Total Cost	Labor Uni...	Total Lab...	Alt Part Description	Alt Sales Description	Alt Service Description	Part Dependency Note
\$6.00	\$6.00	1.00	1.00	Proposal Alt Part Desc	Proposal Alt Sales Desc	Proposal Alt Service Desc	
\$2.00	\$2.00	1.00	1.00				
\$3.00	\$3.00	1.00	1.00				
\$4.00	\$4.00	1.00	1.00				

eForms

These new Alternate Descriptions can then be used on an eForm so that the customer document can be in an Alternate Language or with clear descriptions.



< Available Forms

Charges
Closing Date
Closing Percent
Contact
Customer Id
Customer Site Id
Customer System Id
Deposit
Deposit %
Deposit Item
Description
Discount Item
Discount Total
Email
Estimate Id
Estimate Status
Follow Up Date
Items
Labor Item
Labor Total
Marketing Source
Net Amount
Notes
PO Number
Parts
Phone
Proposal Date
RMR Total
RMRs
Rejected Reason

0
1
2
3
4
5
6

Items	Alt Description	Quantity	Rate	Amount
...	...	...	...	...

Parts	Alt Part Description	Alt Sales Description	Alt Service Description	Quantity	Rate	Amount
...	...	...	...	...	...	...

RMR	Alt Description	Monthly Amount	Cycle Amount
...	...	...	...

7
8
9
10

Items

Alt Description	Quantity	Rate	Amount
	1.00	\$30.00	\$30.00
	1.00	\$50.00	\$50.00
	1.00	\$50.00	\$50.00
	1.00	\$60.00	\$60.00
	1.00	\$30.00	\$30.00
	1.00	\$70.00	\$70.00
	1.00	\$80.00	\$80.00
	1.00	\$90.00	\$90.00
	1.00	\$100.00	\$100.00
	1.00	\$20.00	\$20.00

Parts

Alt Part Description	Alt Sales Description	Alt Service Description	Quantity	Rate	Amount
Proposal Alt Part Desc	Proposal Alt Sales Desc	Proposal Alt Service Desc	1.00	\$60.00	\$60.00
			1.00	\$20.00	\$20.00
			1.00	\$30.00	\$30.00
			1.00	\$40.00	\$40.00
			1.00	\$50.00	\$50.00
			1.00	\$70.00	\$70.00
			1.00	\$80.00	\$80.00
			1.00	\$90.00	\$90.00
			1.00	\$100.00	\$100.00
			1.00	\$10.00	\$10.00

RMR

Alt Description	Monthly Amount	Cycle Amount
	50.00	50.00

Installation

No special installation is needed. Just AlarmBillr, SalesAutomation, eForms and/or a linked SedonaOffice through SedonaCloud for the full functionality.

Configuration

No additional configuration is needed.

Integration

Requires SedonaCloud integration connected to a SedonaOffice DB.