

AlarmBiller Features - Dependency Notes

12/18/2023 4:45 pm EST

Overview

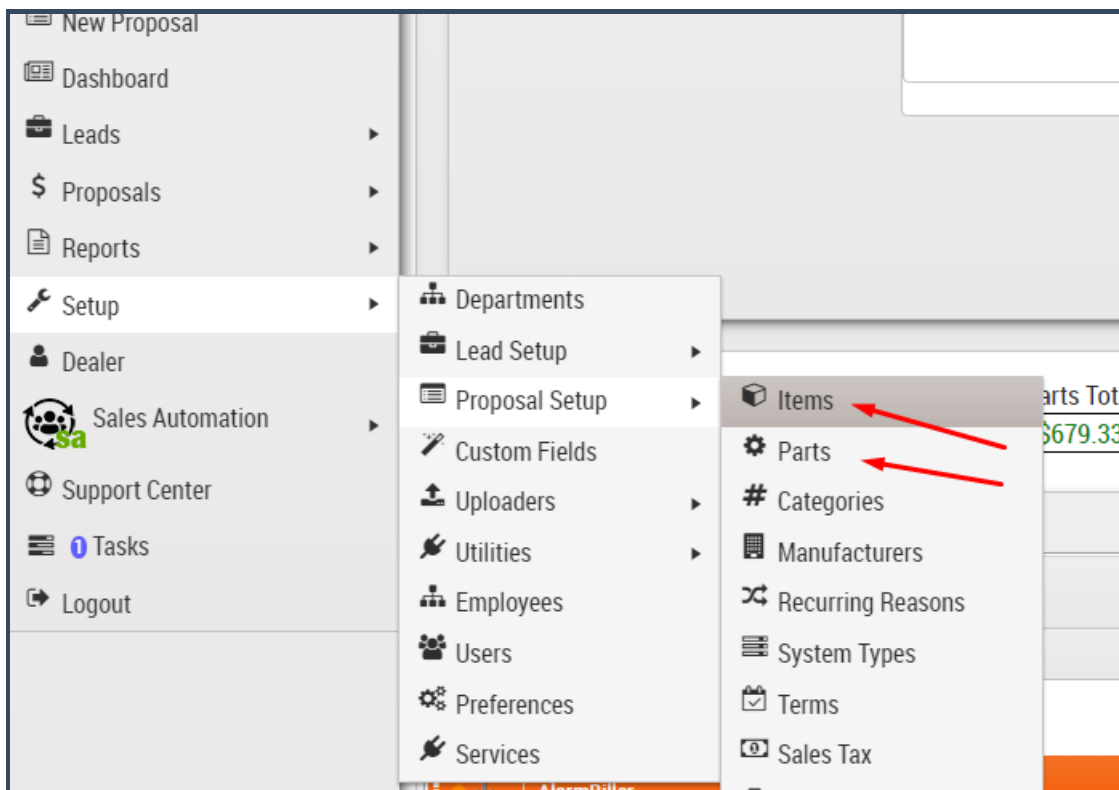
This feature will create greater ease of use for sales reps quote configuration process and bring in additional sales from creating more crisp concise proposals for their prospects. Dependency notes are notes pre-assigned to parts, items and recurring items and can appear on the proposal depends on the proposal eForms template setup. These are free form text fields with up to 1,000 characters available and are setup in the setup tables in SalesAutomation.

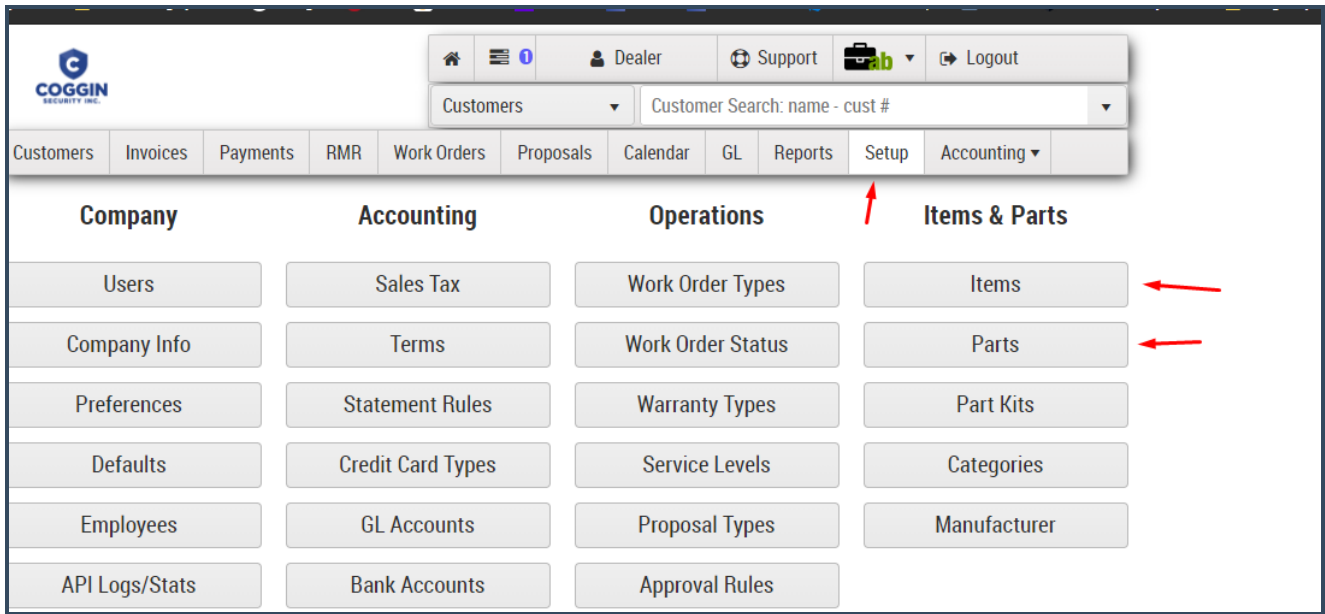
Technical Information

There are several places where these show up. They can be seen on the view grid for Items and Parts. Also, Proposals show these fields when building up the Items, Parts, and RMR lists. Finally, these fields can be included in eForms.

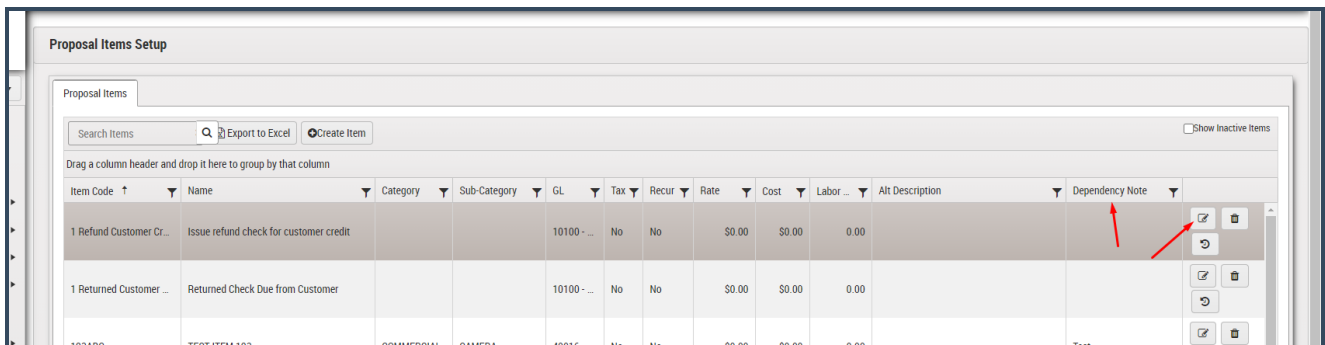
Item/Part

You can add Dependency notes from the Items/Parts setup in SalesAutomation or AlarmBiller.












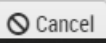


From there, you simply edit an item to set the note.



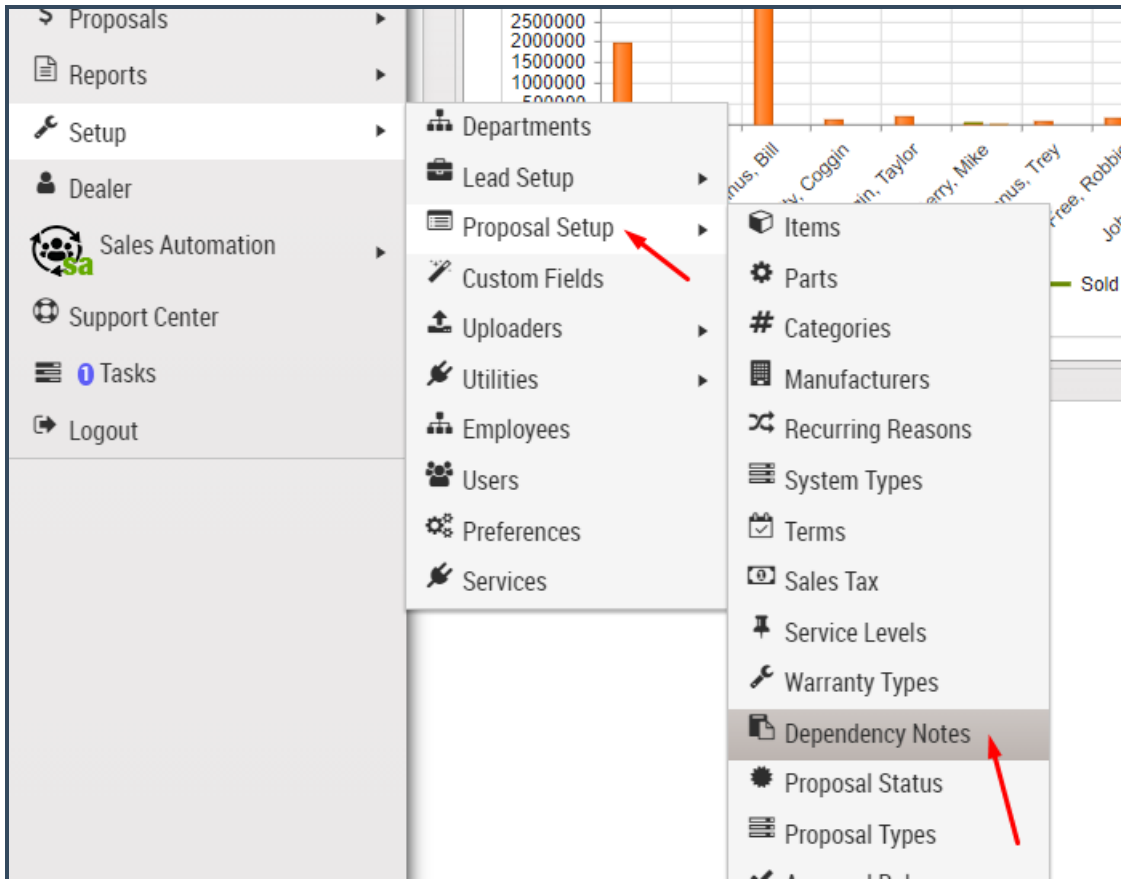
Edit ×

Item Code	1 Refund Customer Credit 	GL Account	10100 - Deposit ... 
Description	Issue refund check for customer credit <small>112 characters remaining</small>	Default Rate	\$0.00
Alt Description	Alt Description <small>100 characters remaining</small>	Cost Amount	\$0.00
Category	Category 	Labor Units	0.00  
Sub-Category	Sub-Category 	<input type="checkbox"/> : Taxable 	<input type="checkbox"/> : Recurring Item 
Dependency Note	Item setup dependency Note <small>974 characters remaining</small>		

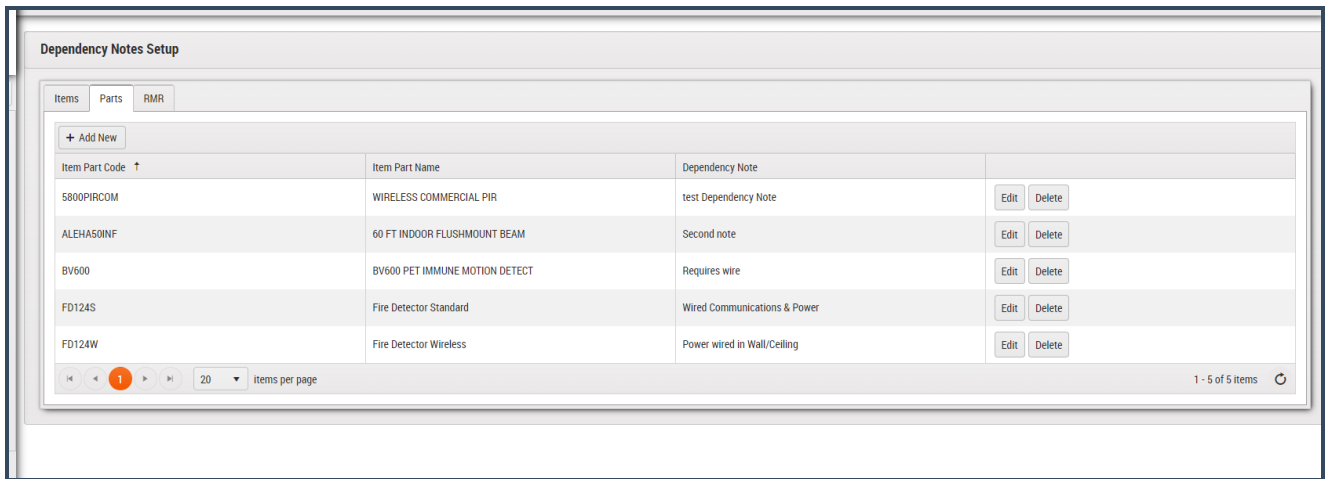
 

Dependency Note Quick Grid

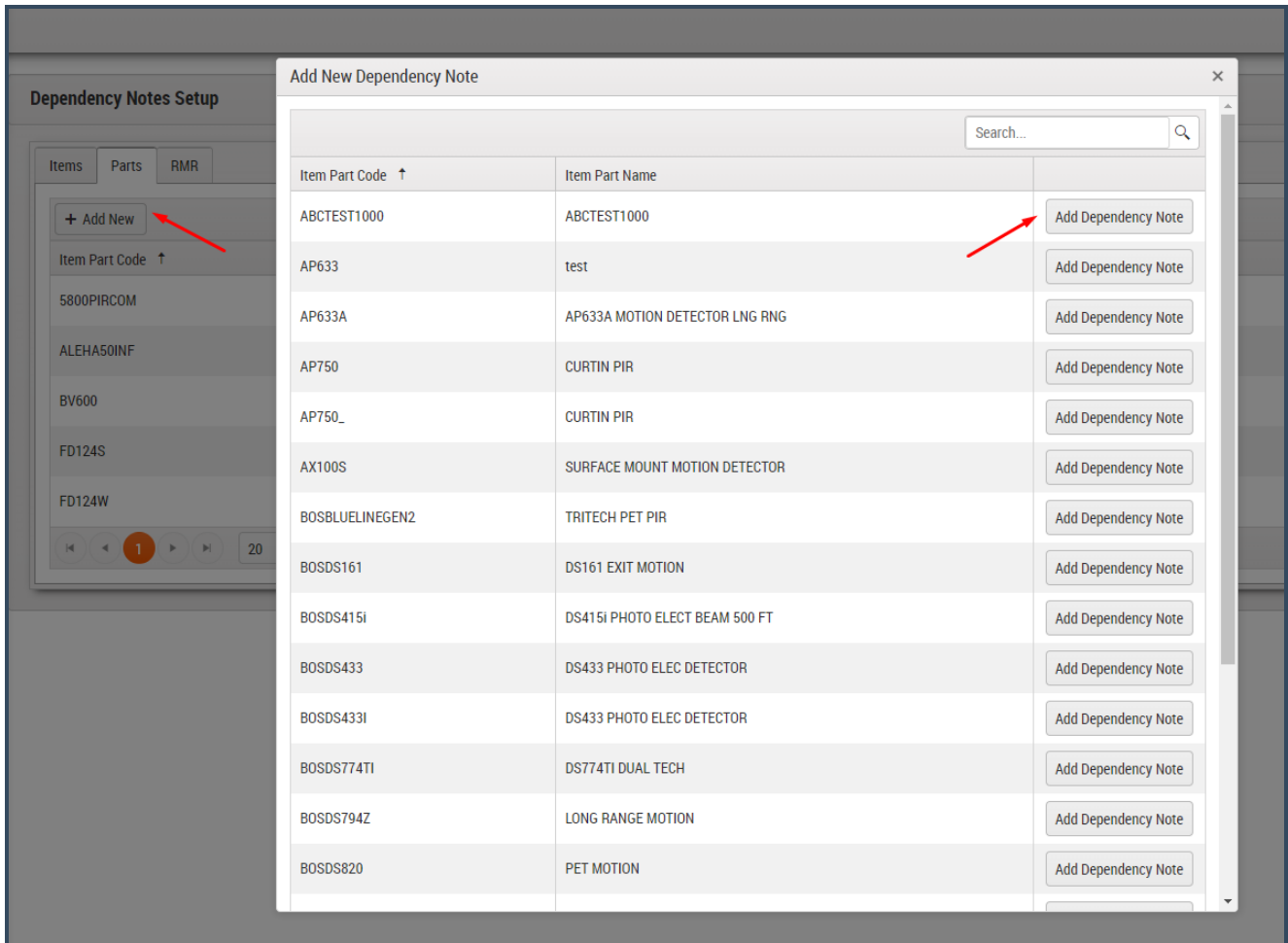
In SalesAutomation there is a quick grid to show these Dependency Notes and quickly add new ones. It is found under the Proposal Setup area.



This provides a quick way to setup Items, Parts, and RMR dependency notes as well as Edit and Delete them.



You can add new ones, which will bring up a list of all the things that do not yet have a Dependency Note. There is a search feature here as well if you are looking for a specific thing. Simply click the Add Dependency Note button to quickly attach a note to the desired thing.



Proposal

Dependency Notes can also be added/changed directly from the Proposal. In edit mode, the default value will come from the underlying item or the sales package. But this can be added/modified directly on the proposal. This can be done for Items, Parts, and RMR.

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

Show Proposal Detail

List Price	Discount	Sales Price	Est Tax	Proposal Total	RMR Total
\$3,005.00	\$0.00	\$3,005.00	\$240.40	\$3,245.40	\$50.00

Hide SA Summary

Sales Automation

Labor

Labor Item: I1

Labor Rate: \$125.00

Labor Cost: \$40.00

Labor Units: 15.00

Discount Item: Select a Discount Item

Percentage: 0.00

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

Total Cost: \$713.00

Gross Profit: \$2,292.00

Commissions: \$0.00

Items	Parts	Charges	RMR	Notes	Docs	Complete		
Add Items								
Item Code	Sales Tax	Amount	Item Cost	Total Cost	Labor Uni...	Total Lab...	Item Dependency Note	Item Alt Descripti...
SC Horry County		\$30.00	\$3.00	\$3.00	0.50	0.50	Proposal Dependency Note	
SC Horry County		\$50.00	\$5.00	\$5.00	0.50	0.50		
SC Horry County		\$50.00	\$5.00	\$5.00	0.50	0.50		
SC Horry County		\$60.00	\$6.00	\$6.00	0.50	0.50		
SC Horry County		\$70.00	\$7.00	\$7.00	0.50	0.50		
SC Horry County		\$30.00	\$3.00	\$3.00	0.50	0.50		

Sales Package Edit

These will be used to populate a Proposal with default values. You can set Dependency Notes on Items, Parts, And RMR from here. If you add one that already has an underlying Dependency Note, it will be used as the default one. But you can then edit it as needed.

Edit Sales Package Cancel Save

Name: Top Best Package Ever

Description: The biggest Best sales package ever. Only for you. For a limited time. 930 characters remaining

Labor Item: Pittance

Labor Rate: \$15.00

Labor Cost: \$100.00

Discount Item: Rumbling

Discount %: 10.00

Discount Amount: \$48.50

Items Total	Parts Total	Labor Total	Package Total	Discount	RMR Total
\$0.00	\$484.99	\$0.00	\$484.99	\$48.50	\$0.00

Sort	Item Code	Item Description	Qty	Rate	Tax?	Amount	Item Cost	Total Cost	Labor Units	Total Labor Uni...	Base Item Inactiv...	Item Dependency Note
	NC Labor Access	Labor	1	\$0.00	Y	\$0.00	\$0.00	\$0.00	0.00	0.00	No	Sales Package Dependency Note
	AlarmBillr	AlarmBillr Services	1	\$0.00	N	\$0.00	\$0.00	\$0.00	0.00	0.00	No	

1 - 2 of 2 Items

eForms

Depending on how the end user wants the form to appear, the Dependency Note values can be displayed on Charges, Items, Parts, and RMR lists on an eForm.

< Available Forms

- 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
- Sa Lead Id
- Sales Person Email
- Sales Person Id
- Sales Person Name
- Sales Person Phone
- Sales Person Phone E
- Sales Tax Rate
- Service Level
- System Type
- Term
- Total Amount
- Total Sales Tax

Site

Charges					
Description	Quantity	Rate	Amount	Dependency Note	
...	

Items					
Description	Quantity	Rate	Amount	Dependency Note	
...	

Parts					
Description	Quantity	Rate	Amount	Dependency Note	
...	

RMR				
Description	Monthly Amount	Cycle Amount	Dependency Note	
...	

Test Item One	1.00		\$1,875.00	\$1,875.00	
Items					
Description	Quantity	Rate	Amount	Dependency Note	
Test Item Three	1.00	\$30.00	\$30.00		
Test Item Five	1.00	\$50.00	\$50.00		
Test Item Four	1.00	\$50.00	\$50.00	Test Item 123 again	

Installation

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

Configuration

Setting up Dependency Notes can be done in many areas.

- From the Item/Part Edit form

- From the Dependency Note Quick Grid
- From the Proposal Edit form
- From the Sales Package Edit form

Each of these provides a way to set a note providing additional details or clarity.

Integration

N/A