SalesAutomation and eForms Add-On Module Implementation Process for SedonaOffice

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Purpose

This document walks a Project Manager (PM) through the steps necessary to implement the purchase of SalesAutomation and eForms with SedonaOffice

The SalesAutomation module allows customers to create and track leads and convert those leads into quotes and then jobs in Sedonaoffice. It is usually sold with the eForms module, which allows for the electronic sending of documents for signatures.

The data is stored in a separate database from SedonaOffice (uses AlarmBiller database). The application can only be linked to one SedonaOffice database at a time.

Critical Note: Customers migrating to SedonaOffice from AlarmBiller and adding SalesAutomation will need to have a new customer account setup for AlarmBiller to allow for testing of the module with SedonaOffice and for go-live use without overwriting the customer's current AlarmBiller database.

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Implementation Steps

The following steps are used to implement the application:

1. Project template: Add On-Modules Implementation
2. Review product compatibility chart for SalesAutomation
3. Confirm customer is not using AlarmBiller/Managely
    - If **yes**, a new customer account will need to be set up to use with SedonaOffice
    - Reach out to sales operations for this new account

4. Verify customer's SedonaOffice version is compatible
    - **Yes** – move to step 2
    - **No** – see the document View Customer API Companies and Users
        - 5.7 or lower – Upgrade completion is required prior to installation
        - 6.x or higher, add install time to installation
5. Confirm the customer's API status
    - Included in the project quote?
        - **Yes**
            1. Provide the customer with preinstall checklists for install available in: Implementation and Installation Forms
                - On-Prem: SedonaWeb (Limited API) On-Prem Preinstall Checklist
                - Cloud: SedonaWeb (LimitedAPI) SedonaCloud Preinstall Checklist
            2. Include install time in the installation step
        - **No**
            1. Confirm customer has API see the document View Customer API Companies and Users
                - **No** – inform sales API needs to be sold
                - **Yes** – add time to step 5 if an upgrade required
6. Send Kick Off email
    1. Template: 'SedonaOffice Add on Module'
        1. Update compatible version information and the customer's known version information
           Update fields in red
        2. If API is being installed, remove "To log into SedonaCloud, your URL is"
            - Attach the SedonaWeb checklist for on Prem or Cloud
7. Schedule Installation
    1. Combine the necessary estimated time for each of the install tasks required:
        - **SedonaOffice** Upgrade from 6.x only: 30 minutes
            - The customer will be down during this time
        - **API**
            1. Install
                - Hosted – 2 hours
                - On-Prem – 6 hours
            2. Upgrade – 30 min
        - **SalesAutomation**
            - 1 hour
    2. Update the task Chatter to include all elements to be installed/upgraded
    3. Upload any preinstall checklists
    4. For On-Prem customers, schedule an Outlook appointment for the technician and the customer
    5. The technician will install and provide the URL, username/password if API is installed and SalesAutomation URL
8. Test the SalesAutomation Services
    1. Launch the customer's SalesAutomation site from Host AlarmBiller
        1. https://host.alarmbiller.com/HostSupportCenter
        2. Enter the customer's name in the Dealer Search box
        3. Click 'Login to Dealer'
        4. Click the drop-down arrow and select 'SalesAutomation' and click login
        5. Click through the welcome screen presented
        6. From the menu at left, hover over 'Setup'

7. Select 'Services'
8. Select "Test Services
   - A message in green should appear: 'Service integration The Service is Ready'
9. Go to 'New Lead' and open a drop-down to validate it is reading data

2. If you are not successful, schedule additional time with the technician to resolve

9. Send Training Prerequisites
   1. Provide the API URL to the customer and user login information (new API install only)
   2. Provide the link to the SalesAutomation site
   3. Inform customer they can now set up their SalesAutomation users per the documentation below.
   4. Provide the customer with training video links for eForms:
      - eForms Training Videos
      - eForms Overview
      - Creating eForm Templates
      - Creating Custom Proposals
      - Sending eForms Templates
   5. Direct customer to review the following documents in BoldU
      - SalesAutomation Guide
      - SalesAutomation – New Quick Quote
10. Training
    - Schedule training, if sold
    - Estimated time: 1 hour
      - Schedule for the time sold in the quote
11. Send Project Completion Request
12. Close Project

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User Login Information

Users will log in to the SalesAutomation URL using a username and password set up by the customer in their SalesAutomation application.

The URL can be found by looking the customer up in HostAlarmbiller and locating their dealer prefix. The URL is then: https://dealerprefix.alarmbiller.com

Users that will need access to just SalesAutomation and eForms do not require a SedonaOffice login or Duo enrollment. The customer will add these users to SalesAutomation and provide the user with the URL to SalesAutomation and the username/password setup for them here.

Users that will access other areas of SedonaOffice will need both the login for SalesAuotmation above and SedonaOffice, as well as Duo enrollment to access SedonaOffice

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Link SalesAutomation to a Different

Company

During the initial setup of SalesAutomation, the application may be linked to a sandbox database. At go live, the application does need to be relinked to the live database.   For SedonaOffice implementations that include SalesAutomation, this is done immediately after the live database is created by the Data Conversion specialists.

A task for the technician to relink add-on modules to the live database is part of the post-go-live steps, however, a PM can also relink if necessary.   The following steps are required to relink the application:

1. Confirm the database to link to has been created in the API
    - See document View Customer API Companies and Users for assistance
2. Launch Host AlarmBiller
    - https://host.alarmbiller.com/HostSupportCenter
3. Enter the customer's name in the Dealer Search box
4. Click 'Login to Dealer'
5. Click the drop-down arrow and select 'SalesAutomation' and click login
6. Click through the welcome screen presented
7. From the menu at left, click on 'Setup'
8. Select 'Services'
9. Select 'Edit' on the existing link
10. Update the endpoint URL to change the company URL Prefix to match the prefix of the company in the API you want to link to
11. Change the username/password to one that is associated with the new company
    - Request this information from the customer if it is not known from previous install steps
    - A new Admin login may need to be created if the existing username/password is not known
12. Retest the services
    - Follow step 8 in the Installation instructions

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