

Quick Quote Processing in Sales Automation for SedonaOffice Users

12/28/2023 3:23 pm EST

To process a Quick Quote in Sales Automation, first enter or verify data in SedonaOffice; otherwise, the Quick Quote will not process.

SedonaOffice

Prepare data in SedonaOffice that is in Sales Automation for use by the Quick Quote. If users have been using SedonaOffice, they may already have this data. Follow and complete these in order:

1. Invoice Items
2. Parts
3. Users
4. Employees
5. Technicians
6. Job Types
7. Calendar

Invoice Items

Menu path: Sedona Setup > Invoice Items

Create new Invoice Items or verify information in existing ones.

Sales Automation uses this information:

- Item Type (recurring versus nonrecurring)
- Default Rate
- Default Cost
- Alt Description
- Taxable
- Available in Sales

Invoice Items

Invoice Items List

Item	Description	Type	G/L Code	Category
Job Part	Job Part	IPJ	410210	Install/Sales
INVTM02	invoice item test two	IPJ	640490	G & A
INVTM3	Invoice item test three	IPJ	410310	G & A
INVTM4	Invoice item test four	IPJ	410310	G & A
NOTAVAILSALES	Not available sales or service	IPJ	410310	G & A
OTC Part	Over-the-Counter Part Sale	IPS	490110	G & A
SVC Part	Service Part	IPS	420331	Service
INVTM01	invoice item one	IPS	410310	G & A
INVTM5	invoice item five	IPS	420331	G & A
Job Labor	Job Labor	LBJ	410210	Install/Sales
INVLBR	invoice labor item	LBJ	410212	G & A
INSP Labor	Inspection Labor	LBS	420341	Inspections
INSP Trip	Inspection Trip Charge	LBS	420341	Inspections
SVC Call	Minimum Service Call Charge	LBS	420331	Service
SVC Labor	Service Labor	LBS	420331	Service
SVC Trip	Service Trip Charge	LBS	420331	Service
Install Security	Install Security System	NR	410210	Install/Sales
Add-On	Add-On to System	NR	410310	Install/Sales
Install A/V	Install Audio/Video System	NR	410210	Install/Sales
Install Access	Install Access System	NR	410212	Install/Sales
Install CCTV	Install CCTV System	NR	410210	Install/Sales
Install Fire	Install Fire System	NR	410212	Install/Sales

Include Inactive

Item Edit

Item Type: [] Account: [] Inactive

Category: [] Taxable

Item: [] Available in Sales

Description: [] Job Costing: [] Available in Service

Default Rate: [] Default Cost: 0.00

Alt Description: []

Apply New Delete

Parts

Menu path: Inventory > Parts

Create new Parts or verify information in existing Parts.

Sales Automation uses this information:

- Labor Units
- Description
- Price
- Available in Sales
- Sales Alt Description
- Service Alt Description
- Purchase Cost

Part Edit Inactive

Part Detail | Vendors | Alt. Parts | Warehouses | Custom Fields | Documents

Description

Description Part Kit
 Detail Special Order
 Product Line Customer Equipment
 Manufacturer Stock Item For Jobs
 Manuf Part Code Freeze All Purchasing
 Manuf Warranty Ship Weight
 U.P.C. Labor Units
 Notes
 Alt. Description

Costing

Method
 PPV Account
 Direct Exp Acct

AR Setup

Invoice Item
 Income Acct

Sales

Invoice Description
 Price Available for Sales
 Alt. Description

Service

Invoice Description
 Price 1 Available to FSU
 Price 2
 Alt. Description

Save Copy Close

Users

Menu path: Sedona Setup > Users

If the service technicians defined on a quick quote need access to SedonaOffice, the service technician must be defined as a user with the appropriate user group(s).

Users

Users List

User Code	Name	Description	Inact...
Administrator	Master, Sedona A	MasterUser	N
cloud1	Tester, Cloud	QA Tester	N
SALES1	Person, Sales	salesperson	N

Include Inactive

User Edit

Inactive
 Create Other Users

User Code:
 Password:
 Confirm Password:
 Description:
 Last Login:

First:
 Middle Initial:
 Last:
 E-Mail:

User Groups

User Group	Description
<input type="checkbox"/> Administration	Administration
<input type="checkbox"/> Administrator	Administrator
<input type="checkbox"/> Clerk	Clerk
<input type="checkbox"/> Manager	Manager

Employees

Menu path: Sedona Setup > Employees

A service technician and salesperson must be defined as employees.

- Set the technician as Type = SV (Serviceperson)
- Set the salesperson as Type = SL (Salesperson)

Assign the employee to the appropriate department (Assigned To)

Employees

Employees

Employee Code	First Name	Last Name	Department	Inactive
doud1	Cloud	Tester	Administration	N
DANTEST	Dan	Test	Service	N
Example	Do Not Use****	Example ONLY	Service	N
INSTTECH1	Install	Tech	Installation	N
SALES1	Sales	Person	Sales	N
SALES2	IMA	SELLER	Sales	N
STARTECH1	Star	Tech	Service	N
Tech1	Tech	One	Service	N
Tech2	Tech	Two	Service	N
TECH3	SERVTECH	THREE	Service	N
TechCT1	Tech	CentralTime	Service	N
TechMT1	Tech	MountainTime	Service	N

Include Inactive

Employee Edit Inactive

Employee Code

General Information | Payroll | Commission Setup | Documents

User Code First Name

Type Last Name

Assigned To Middle Initial

Supervisor Date of Hire

Termination

Job Approval Group

Created: Last Edit:

Technicians

Menu path: Sedona Setup > Technicians

A service technician can be a Service Tech, Installer, or Both. For a quick quote the technician must be defined as Service Tech or Both.

The related information for service and installation (if also installer) must be provided.

Service Technician

Technician List

Technician	Service Company	Install Company	Expertise	Inactive
Tech CentralTime	InstallBot	Your Installation Company	5	N
Tech MountainTime	InstallBot	Your Installation Company	5	N
Tech One	InstallBot		2	N
Install Tech	InstallBot	Your Installation Company	5	N
Star Tech	InstallBot		5	N
Dan Test	InstallBot	Your Installation Company	3	N
Cloud Tester	InstallBot	Your Installation Company	5	N
SERVTECH THREE	InstallBot	Your Installation Company	5	N
Tech Two	InstallBot		5	N

Include Inactive

Technician Edit Begin Day From

Name Address...

Service Tech
 Installer
 Both

Service | Installation | Routes

Service Company
 Warehouse
 Text Message Address
 Expertise Level

Job Types

Menu path: Sedona Setup > Job Types

Job types are defined in the Sales Packages in Sales Automation (menu path: Setup > Proposal Setup > Sales Packages).

The Job Type on the Quick Quote defaults from the Sales Package, but a user can change it.

Job types can control the Invoice Items that can be selected when the specific type is selected. This includes both Sales Packages and Quick Quotes within Sales Automation.

Zero Part Price (Detail tab) - this checkbox determines if the price of the part defined in the Sales Package or Quick Quote includes the actual part price or is zero.

Items tab - Invoice Items that can be selected on a Sales Package or Quick Quote are limited to only those Invoice Items defined on the Job Type. If no Invoice Items are defined for the Job Type, then all active Invoice Items can be selected on a Sales Package or Quick Quote.

Job Types

Job Type	Description	Category	Pctg Billing	Inact...
Access Control	Access Control	Install/Sales	N	N
CCTV	CCTV	Install/Sales	N	N
Fire	Fire	Install/Sales	N	N
Intrusion	Intrusion	Install/Sales	N	N
MISC	MISC	Service	N	N
PARTPRICEINCL	Zero Part Price not checked	G & A	N	N
PARTPRICEINCL3ITM	Zero Part Price not checked 3 ite...	G & A	N	N
ZEROPRICE1ITM	zero part price 1 item	G & A	N	N
ZEROPRICEALLITM	Zero part price all items	G & A	N	N

Include Inactive

Job Type Setup Inactive

Job Type: Description:

Detail | Job Tasks | Costing | **Items** | Accounts | Commission Types | Phases

Item Code	Description	Default Amount
INVITM01	invoice item one	50.00
INVITM3	Invoice item test three	75.00
INVITM5	invoice item five	50.00

Item: Amount:

Save New Remove

Apply New Copy Delete

Calendar

Menu path: Sedona Office > Service

When a Quick Quote that has the option Create Miscellaneous Appointment selected; a technician is defined; and is saved successfully, a miscellaneous appointment is written to SedonaOffice.

Sales Automation

Prepare this data in Sales Automation that is to be used by Quick Quote. If users have been using Sales Automation, they may already have this data. Follow and complete these in order:

1. Sync Management
2. Preferences
3. Users
4. Employees
5. Departments
6. Time Windows
7. Sales Packages

{Process}

8. New Quick Quote – new menu option for creating QQ

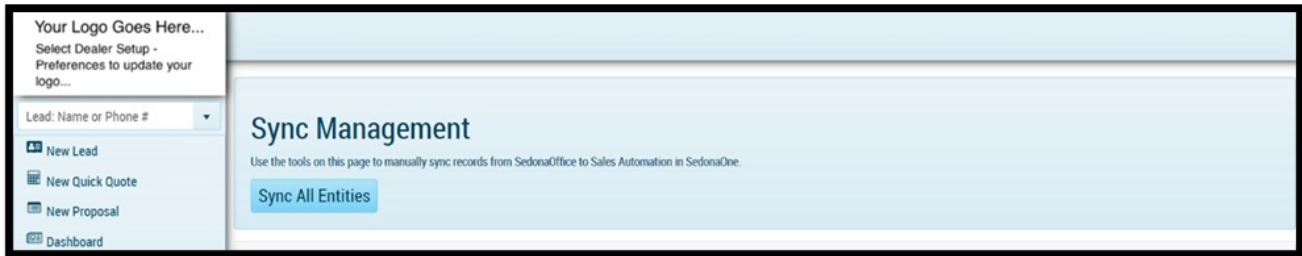
{Views}

9. Leads – successfully created Quick Quote generates a new lead
10. Search – allows a look-up of leads using the phone or cell phone of the lead
11. Proposal – view or edit the proposal generated from Quick Quote or New Proposal
12. Calendar – view the technician appointments created from a Quick Quote. If the user entering the Quick Quote is defined as a salesperson and a SedonaOffice salesperson is defined, then a sales appointment will be added to the calendar. Job, Service, and Miscellaneous appointments from SedonaOffice will also appear on the calendar.

Sync Management

Menu path: Setup > Sync Management > Sync All Entities

Sync All Entities: This synchronizes any new or updated entities from SedonaOffice to Sales Automation.

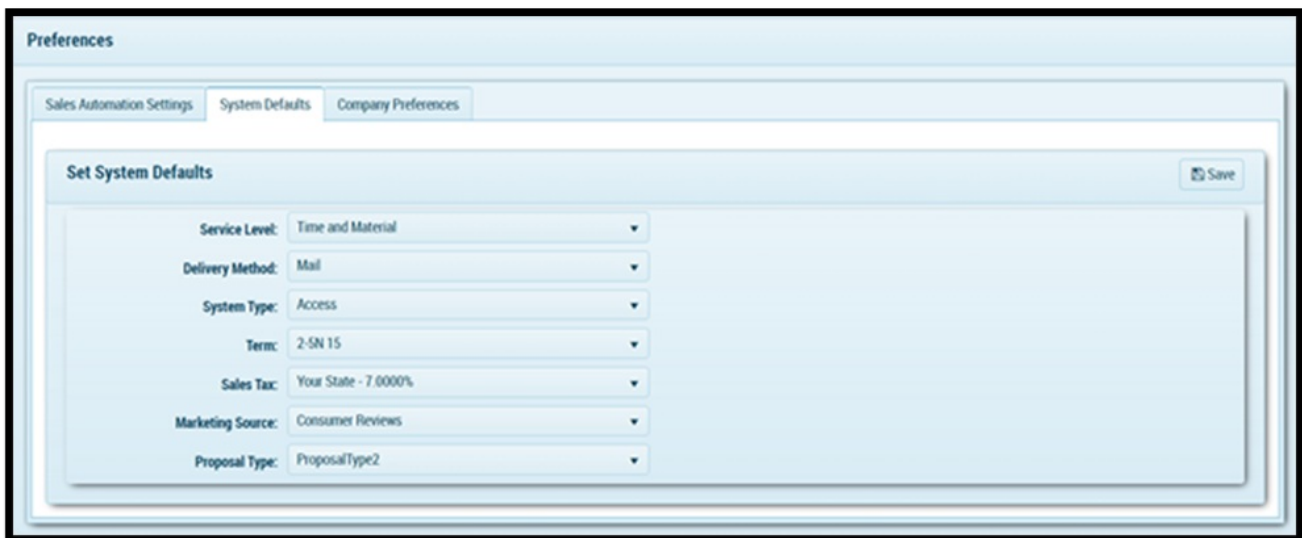


Preferences

Menu path: Setup > Preferences > System Defaults tab

System Defaults – Verify that these fields are defined:

- Service Level
- Delivery Method
- System Type
- Term
- Sales Tax
- Marketing Source
- Proposal



Menu path: Setup > Preferences > Company Preferences tab

Company Preferences – Verify that the Company Info is complete.

Preferences

Sales Automation Settings System Defaults **Company Preferences**

Edit Company Info Save

<p>Company: SedonaOffice TEST</p> <p>Address: 1000 Main Street</p> <p>Address 2</p> <p>Cleveland Ohio 44126</p> <p>Plus 4</p> <p>Phone: (888) 877-1234 ext.</p> <p>Phone 2: (888) 877-2345 ext.</p> <p>Email: [Redacted] </p> <p>From Name: From Name:</p> <p>Sending Email: </p> <p>Company Website URL: URL:</p>	<p>Company Logo: <input type="button" value="Select files..."/> <i>Drop files here to upload</i></p> <p>Logo Preview: Your Logo Goes Here... Select Dealer Setup - Preferences to update your logo... <input checked="" type="checkbox"/></p> <p>Invoice Logo: <input type="button" value="Select files..."/> <i>Drop files here to upload</i></p> <p>Invoice Logo Preview: Your Logo Goes Here... Select Dealer Setup - Preferences to update your logo... <input checked="" type="checkbox"/></p> <p>Report Logo: <input type="button" value="Select files..."/> <i>Drop files here to upload</i></p> <p>Report Logo Preview: Your Logo Goes Here... Select Dealer Setup - Preferences to update your logo... <input checked="" type="checkbox"/></p>
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Users

Menu path: Setup > Users

Set up users who need to access Sales Automation. Also, set up those users needing access to Time & Attendance, eForms, or Sedona-X Mobile (or any combination of these). Technicians who will not be accessing Sales Automation do not need to be set up as user, just as employees.

New User ✕ Cancel Save

Username:

First Name:

Middle Initial:

Last Name:

Phone: Phone # ext.

Email:

User Role:

Products: Time & Attendance eForms Sales Automation
 Sedona-X Mobile app

Password: ⓘ ⓘ

Confirm:

Time Zone: ▼

Default Login: ▼

Site Theme: ▼

Inactive:

Notes:

100 characters remaining

Permissions Services

User Security Permissions:

Miscellaneous	
<input type="checkbox"/> Company Setup	Access to all company setup information.
<input type="checkbox"/> Export	Ability to export data to excel using the "Export to Excel" button on
<input type="checkbox"/> Hide Cost	Hide cost information on Proposal
<input type="checkbox"/> Rate Edit Restriction	Restrict the ability to edit the rate for items and parts on proposals


Employees

Menu path: Setup > Employees

Create new or edit existing employees who need to enter Quick Quotes, salespeople, and technicians.

Select the appropriate checkboxes: Technician, Salesperson, or both

- If the Salesperson checkbox is selected, select the SedonaOffice Salesperson.
- If the Technician checkbox is selected, select the SedonaOffice Tech.

New Employee ✕ Cancel  Save

Linked User:

Employee Number:

First Name:

Employee Since:

Last Name:

Job Title:

Middle Initial:

Description:

Address:

Address

Address 2

City State: Zip Plus 4

Phone: ext.

Cell:

Text Notifications: Select Carrier:


**If your carrier is not listed please create a support ticket and we will try to get it added.

Email:

Technician: Technician

Salesperson: Salesperson

Inactive: Inactive Date

Picture: 

Upload:

SedonaOffice Salesperson:

SedonaOffice Tech:


Sales Quota:

Departments

Menu path: Setup > Departments

Add new or edit existing departments.

Link user(s) to the departments.

New Department ✕ Cancel  Save Department

Department Name:

Description:

200 characters remaining

Sales Team **Managers** Approvers

Current Sales Team Employees

Available SA Employees

- < Office, Sedona
- ◀ User, CT
- User, MT
- > USER, SA
- ▶▶

Time Windows

Menu path: Setup > Proposal Setup > Time Windows

This is used to define a window of time that can be added to the Quick Quote as an estimate of when the technician

could be available.

Description	Start Time	End Time	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Update"/> <input type="button" value="Cancel"/>

Sales Packages

Menu path: Setup > Proposal Setup > Sales Packages

Sales Packages in Sales Automation are required when creating a quick quote. You can define multiple sales packages.

Job Type: Defined in SedonaOffice (details in the SedonaOffice setup defined earlier in this document.)

Labor Item: This cannot be selected until a Job Type is defined. This displays a list of Invoice Items based on the Job Type selected.

Items selection may be limited based on the Job Type selected.

These are some possible scenarios:

- items, parts, and RMR
- items only
- parts only
- RMR only
- items and parts only
- items and RMR only
- parts and RMR only
- similar combinations with various new "Questions"

New Sales Package Cancel Save

<p>Name <input type="text"/></p> <p>Description <input style="height: 40px;" type="text"/> <small>1,000 characters remaining</small></p>	<p>Job Type <input type="text" value="Select Job Type"/></p> <p>Labor Item <input type="text" value="Select a Labor Item"/></p> <p>Labor Rate <input type="text" value="\$0.00"/></p> <p>Labor Cost <input type="text" value="\$0.00"/></p> <p>Discount Item <input type="text" value="Select a Discount Item"/></p> <p>Discount % <input type="text" value="0.00"/></p> <p>Discount Amount <input type="text" value="\$0.00"/></p>
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New Tab: Questions

Edit Sales Package Cancel Save

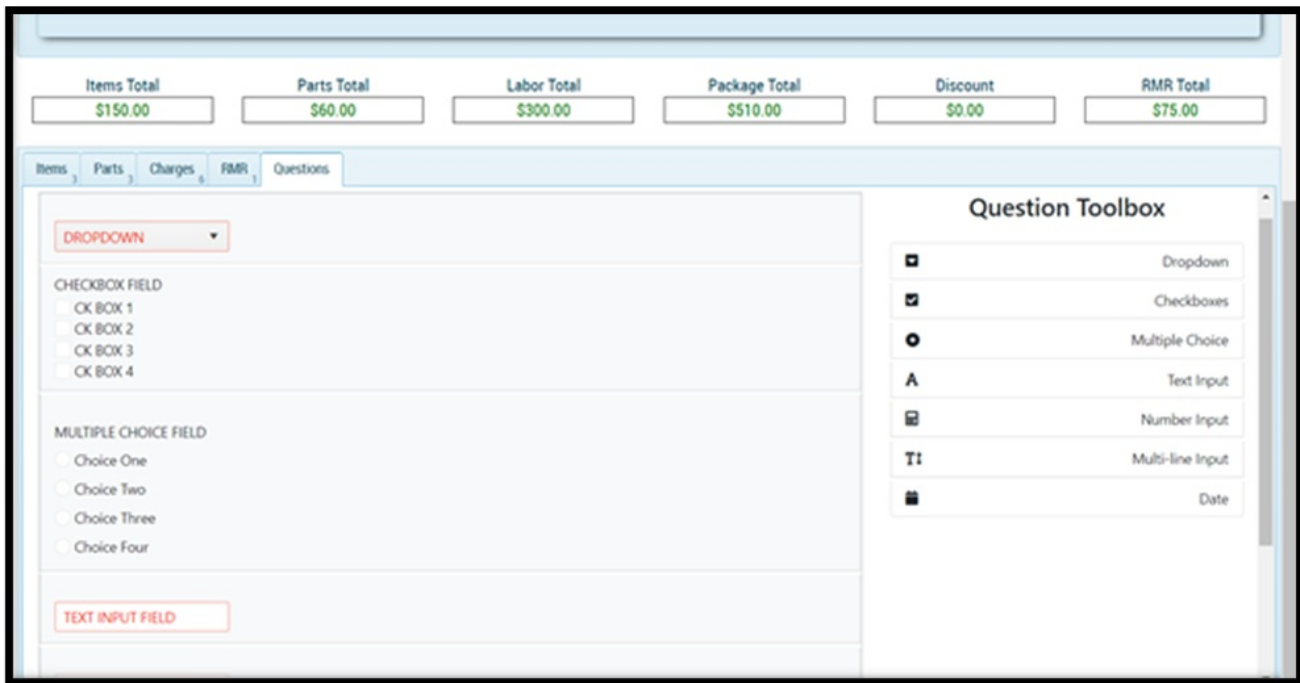
<p>Name <input type="text" value="SLSPKG1"/></p> <p>Description <input type="text" value="JobType w cost, 3 items, 3 parts, rme and all questions reqd"/> <small>940 characters remaining</small></p>	<p>Job Type <input type="text" value="PARTPRICEINCL"/></p> <p>Labor Item <input type="text" value="Job Labor"/></p> <p>Labor Rate <input type="text" value="\$50.00"/></p> <p>Labor Cost <input type="text" value="\$20.00"/></p> <p>Discount Item <input type="text" value="Select a Discount Item"/></p> <p>Discount % <input type="text" value="0.00"/></p> <p>Discount Amount <input type="text" value="\$0.00"/></p>
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Items Total	Parts Total	Labor Total	Package Total	Discount	RMR Total
\$150.00	\$60.00	\$300.00	\$510.00	\$0.00	\$75.00

Items Parts Charges RMR Questions

DROPDOWN

Question Toolbox



Question data types in the Question Toolbox can include these:

- Dropdown list: A dropdown list displays the options for a user to choose.
- Checkboxes: In Quick Quote, each checkbox option defined in the Sales Package is displayed. A user can select as many options as desired.
- Multiple Choice (Radio buttons): In Quick Quote, each multiple-choice option in the Sales Package is displayed. A user can select can only select one.
- Text Input: Free form text
- Number Input
- Multi-line Input: add multiple lines of text using the enter key to generate additional line. Also uses word wrap.
- Date: Users can edit the placeholder label of each of the Question Toolbox data types. For example: the date field might be “Requested Service Date”.

The Question Toolbox data types can be added to the Sales Package by selecting the data type, dragging, and dropping into the open space labeled 'Select/Drop an item from Toolbox'.

When a data type is moved to the Select/Drop an item from Toolbox, the heading (Select/Drop an item from Toolbox) is removed and the selected data type is listed.

Clicking the data type selected, activates the Delete (Trash can) and Edit (Pencil) icon.

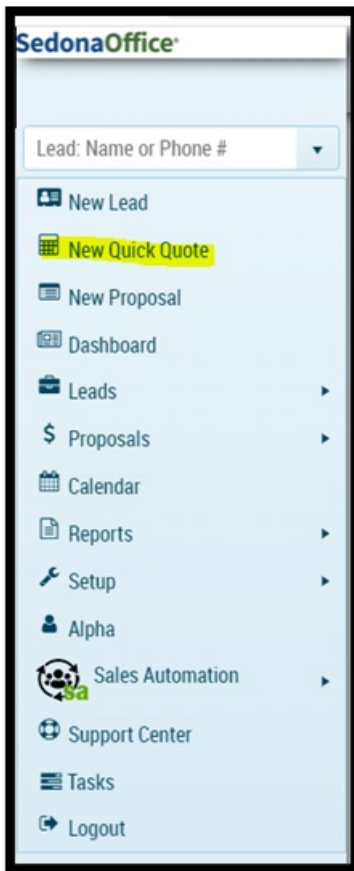
Edit options:

- The label for each question type can be edited.
- Each question type has the option to set the question as required.
- For the question types of Dropdown, Checkboxes, and Multiple Choice; a user can add more options to be listed.

Each option within the question type can have unique text.

Quick Quote

Menu path: New Quick Quote



A Quick Quote can be created for a new lead, Master customer, one of the master customer sub accounts, or an existing SedonaOffice customer.

New Quick Quote Save Reset Form

LEAD INFORMATION

Use Master Customer Customer Customer

First Name (Required) Address Line 1

Last Name (Required) Address Line 2

Email Address City

Phone Number Mobile Number State Zip

CUSTOM FIELDS

CreatedDate month/day/year

New Quick Quote Save Reset Form

QUOTE INFORMATION

Sales Package (Required) Toby New Sales Package

Job Type FJ Time Window Map Code Use Address

ITEMS

Code	Description	Labor (Hours)	Qty	Rate
Add-Ons	Add-On to System	0	1	\$0.00

PARTS

Code	Description	Labor (Hours)	Qty	Rate
028225-32	6211US4 STRIKE	0	1	\$514.80
026800WWW	SPORTSTER 14.4 MODEM	0	1	\$46.75
0300NKEYBOAR	ESKTOP CCRS485 3AXISADCC0300N	1	1	\$0.00
08-227867	SET OF 4 CASTERS	1	1	\$0.00

Sales Package is required.

Job Type, Items, Parts, RMR and Questions from the selected Sales Package are added to the quick quote.

The user can change the Job Type. If the Job Type is changed to a job type that does not include the items included by the Sales Package selected, then those items are removed from the quick quote.

Time Window is optional. This is included in the miscellaneous appointment detail on the calendar.

Map Code: A user can enter free form text. There is no validation. If the Use Address checkbox is selected, then the Map Code is updated with Address Line 1, City, State, Zip/Postal from the Lead Information section of the Quick Quote.

Custom Fields section: If a custom field (Setup > Custom Fields) is defined with the Entity Name = Proposal, then the custom field appears on the Quick Quote form.

Items section: This section includes the items defined on the Sales Package selected.

- If the Job Type is changed to a job type that does not include the items included by the Sales Package selected, then those items are removed from the quick quote.
- A user can change the Labor (Hours), Qty, or both
- Rates cannot be changed

Parts section:

- This includes the parts defined on the Sales Package selected
- A user can change the Labor (Hours), Qty, or both
- Rates cannot be changed

RECURRING				
Code	Description	Cycle	Amount	Monthly Amount
086	Recurring Mon Services II	Monthly	\$48.00	\$48.00

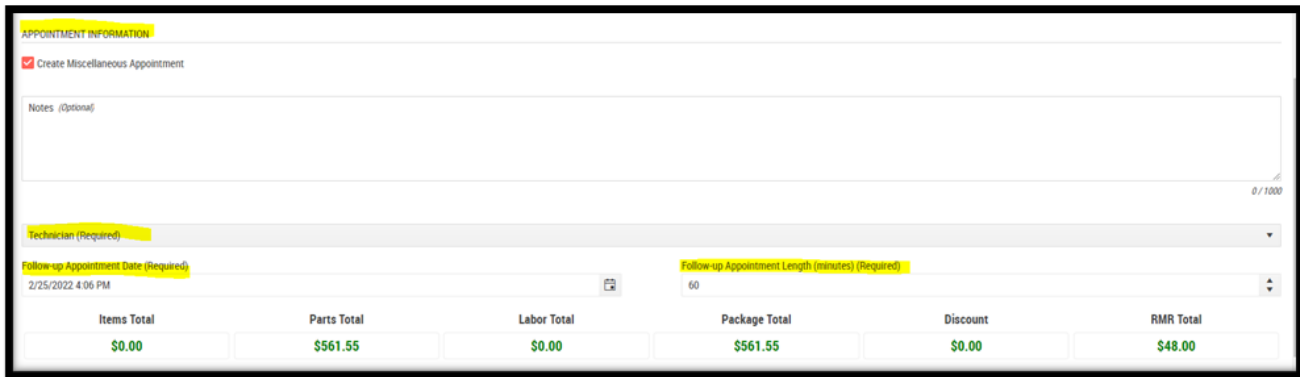
ADDITIONAL INFORMATION
Placeholder Label (Optional) <input type="checkbox"/> Option1 <input type="checkbox"/> Option2
Placeholder Label (Optional) <input type="checkbox"/> Label1 <input type="checkbox"/> Label2
Placeholder Label

Recurring Section:

- This includes the recurring items (RMR) defined on the Sales Package selected
- A user cannot change the Cycle or Amounts

Additional Information Section

- This includes the Questions from the Sales Package selected
- The required questions are marked



APPOINTMENT INFORMATION

Create Miscellaneous Appointment

Notes (Optional)

0 / 1000

Technician (Required)

Follow-up Appointment Date (Required): 2/25/2022 4:06 PM

Follow-up Appointment Length (minutes) (Required): 60

Items Total	Parts Total	Labor Total	Package Total	Discount	RMR Total
\$0.00	\$561.55	\$0.00	\$561.55	\$0.00	\$48.00

Appointment Information Section

- Create Miscellaneous Appointment checkbox
 - If selected, upon successful save of the quick quote creates a miscellaneous appointment in SedonaOffice
 - If selected, requires a technician to be selected; a Follow-up Appointment Date/Time set; and a Follow-up Appointment Length(minutes) defined.
- Notes are optional
- Technician
 - Required if Create Appointment is selected
 - List employees who are flagged as technicians and have SedonaOffice Technician defined
- Follow-up Appointment Date
 - This defaults to current date and time.
 - A user can change this.
 - The Follow-up Appointment Date and Time is used along with the Technician and Follow-up Appointment Length to create the miscellaneous appointment.
- Follow-up Appointment Length (minutes)
 - Defaults to 60. A user can change this.
 - The Follow-up Appointment Length is used along with the Technician and Follow-up Appointment Date and Time to create the miscellaneous appointment.

Total fields appear at the bottom of the Quick Quote form.

- This includes Items Total, Parts Total, Labor Total, Package Total, Discount, RMR Total

Save button

- Creates a proposal if all required information in the Quick Quote is provided.
- If required information is missing, then the field turns red with a tool tip indicating the information is required.
- Upon a successful save:

- There is a message displayed: Quick Quote saved successfully.
- The message is followed by a hyperlink "Click here to view the new proposal". Clicking the link opens the new proposal created from the quick quote.
- After successful save, a user can edit the Quick Quote and Save again to submit an additional proposal (This generates a new proposal. For example: if the same lead/customer wants several different proposals for different configuration options (one proposal includes 6 CCTV cameras and 4 fire alarms, but the other proposal only has 2 CCTV cameras and remote keypad entry on 2 doors).)

Reset Form

- This clears the values on the Quick Quote form (If a user is entering multiple quotes to different lead/customer with different sales packages, it is best to start with a fresh form. If a user is entering a second quick quote for the same lead/customer and is just making minor changes to the new quick quote, then they would make the changes on the existing form instead of clearing all the data and starting over.)

Leads

Menu path: Leads > Listing View or Kanban View

The new lead created by the Quick Quote is listed.

Information from the Quick Quote includes Open Amount, Open RMR, Email, Cell Phone, Work Phone, Department, Primary Sales, and Created By.

Users can edit the lead and add new proposals.

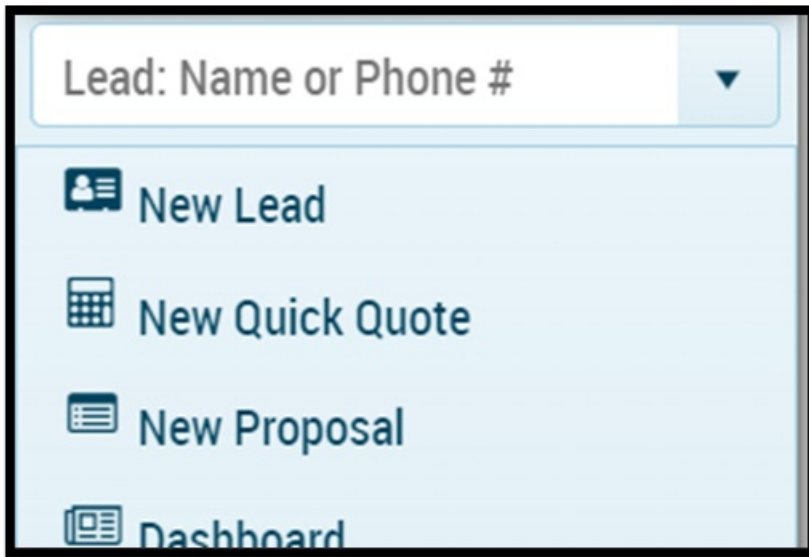
Search

Menu path: Lead: Name or Phone #

A user can search with or without phone formatting.

The search has type ahead capability to limit search results.

The search returns a lead based on phone or cell phone numbers.



Proposal

Menu path: \$ Proposals > Listing View or Kanban View

This lists the new proposal created from a successfully saved Quick Quote and those created by the New Proposal menu option or added from an existing lead.

The list line has a hyperlink to open the proposal.

The proposal contains the information from the Quick Quote.

The values that default from System Defaults include Delivery Method, System Type, Term, Sales Tax, Marketing Source, and Proposal Type.

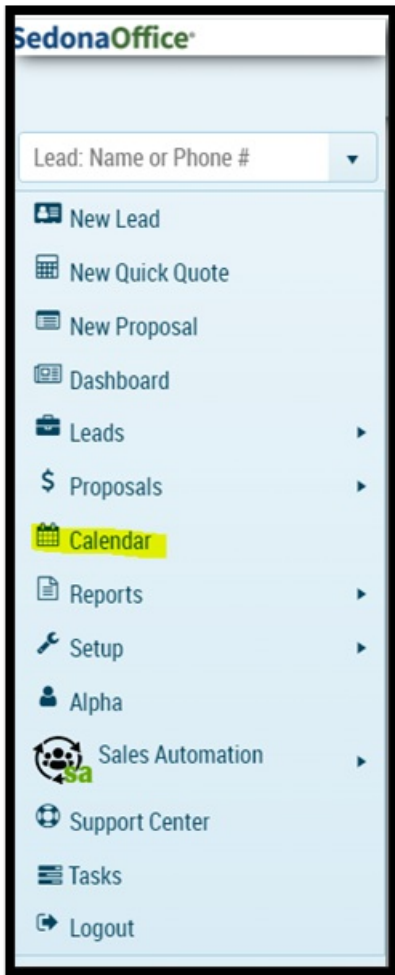
The Department defaults from the first department in the table.sa_aDepartment table of the user entering the quick quote

A user can edit the proposal.

A user can delete the proposal. If the proposal is deleted the corresponding miscellaneous appointment is also deleted.

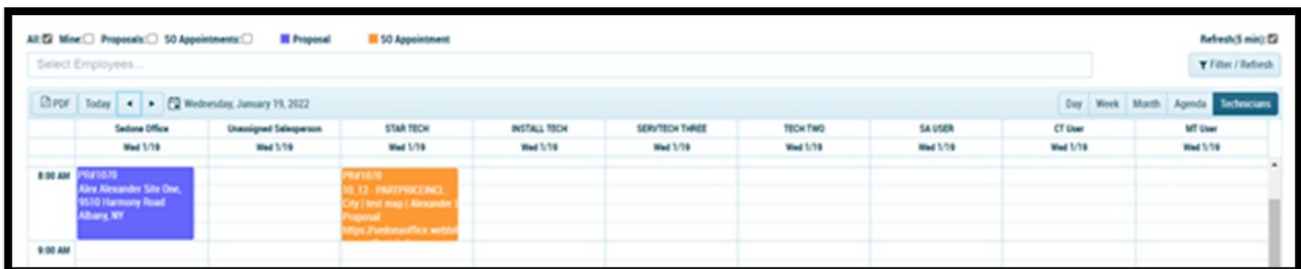
Calendar

Menu path: Calendar



Display Options:

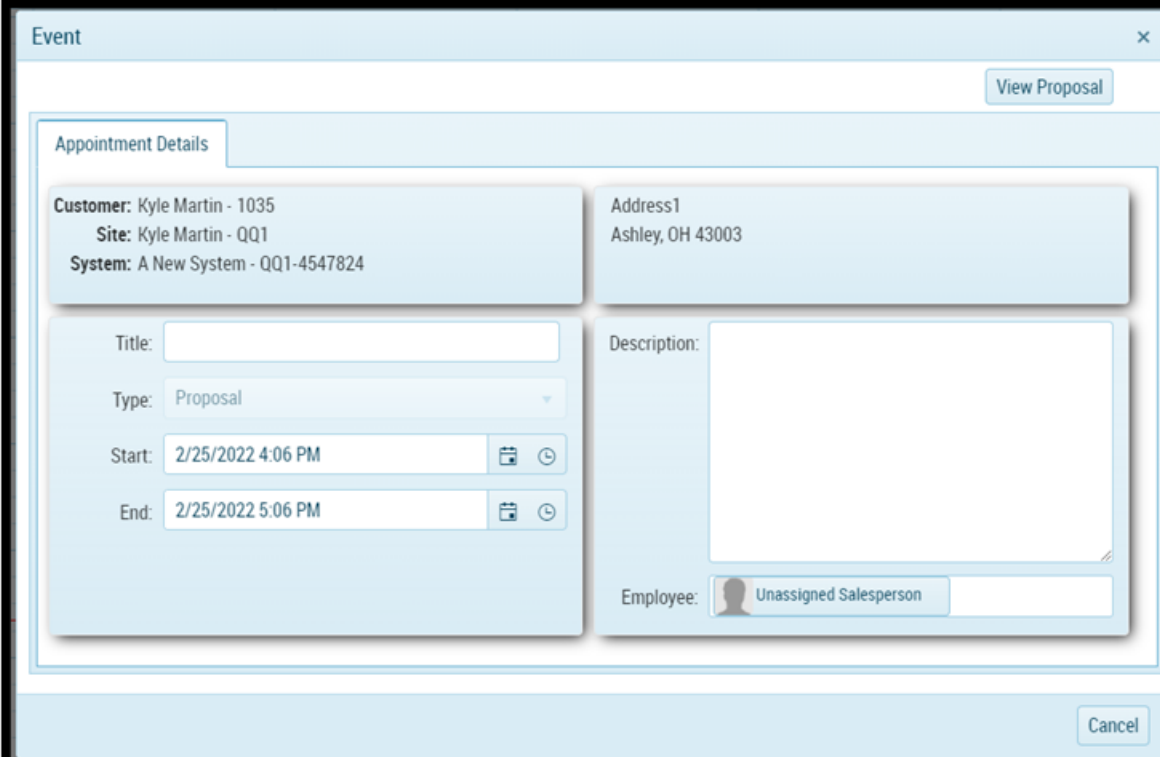
- All: This displays appointments (sales and miscellaneous) for all salespeople and technicians based on the options Day, Week, Month, Agenda, or Technician.
- Mine: This displays the appointments for the current user.
- Proposals: This displays the sales appointments created with the proposal from the quick quote for all salespeople based on the options Day, Week, Month, Agenda, or Technician.
- SedonaOffice Appointments: This displays the miscellaneous appointments for technicians based on the options Day, Week, Month, Agenda, or Technician.



Select Employees

- A user can select one or more employees to limit the results on the calendar to only those employees selected.
- A user can clear the employees selected using the 'X'.

Double click the appointment to view the Event Details.



The screenshot shows a software window titled "Event" with a close button (X) in the top right corner. Inside the window, there is a "View Proposal" button in the top right. Below this is a section titled "Appointment Details" which is divided into two columns. The left column contains the following information: "Customer: Kyle Martin - 1035", "Site: Kyle Martin - QQ1", and "System: A New System - QQ1-4547824". Below this is a "Title:" text box, a "Type:" dropdown menu set to "Proposal", "Start:" and "End:" date and time pickers both set to "2/25/2022 4:06 PM" and "2/25/2022 5:06 PM" respectively, each with a calendar icon and a refresh icon. The right column contains "Address1: Ashley, OH 43003" and a large "Description:" text area. At the bottom of the right column is an "Employee:" field with a person icon and the text "Unassigned Salesperson". A "Cancel" button is located in the bottom right corner of the window.

- Information is view only .
- Appointment Details include the Title, Type, Start and End Date, Description, and Employee.
- View Proposal button opens the proposal related to the appointment.

Appointment information includes Proposal number (PR#), Time Window, Job Type, Map Code, and URL of the proposal.

Refreshes in 5 minutes (if selected)

Filter/Refresh

- A user should refresh the data with any changes to the filters, appointment types, dates, etc. to assure the information is based on the most recent selection.

Show Full Day displays the calendar in full 24 hours versus business hours.

PDF exports the currently viewed data.

Today right/left arrows are for displaying previous or future dates.

A user can select a specific date past or future to display on the calendar.