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

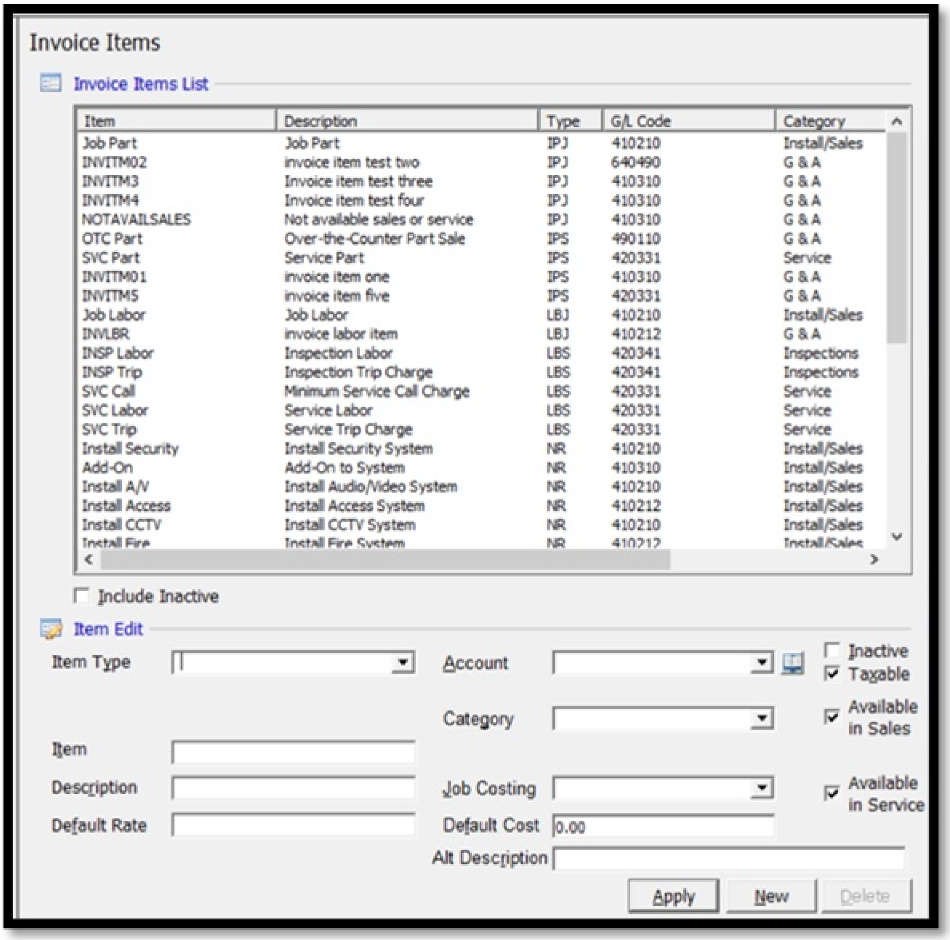
Invoice Items

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



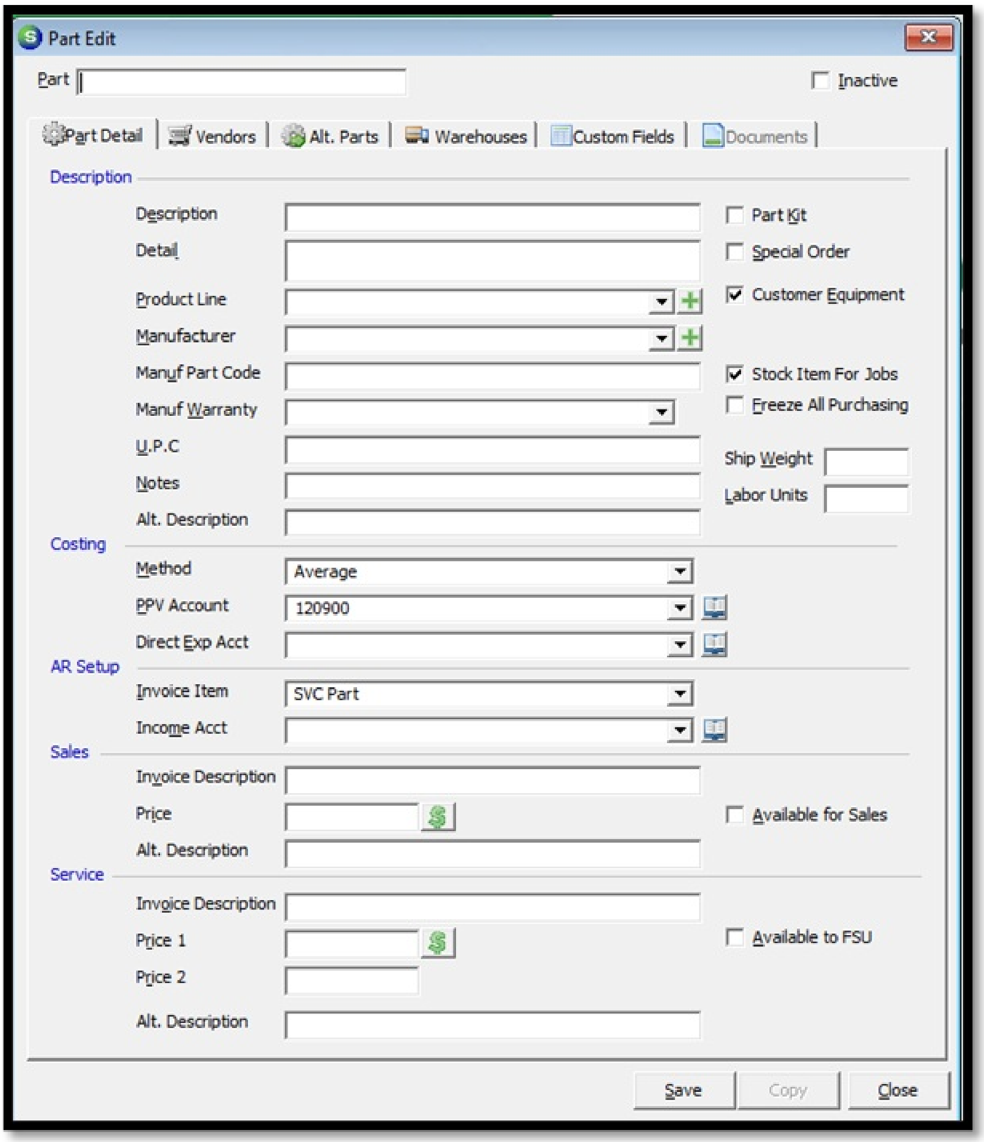
Parts

Menu path: Inventory > Parts

Create new Parts or verify information in existing Parts.

Sales Automation uses this information:

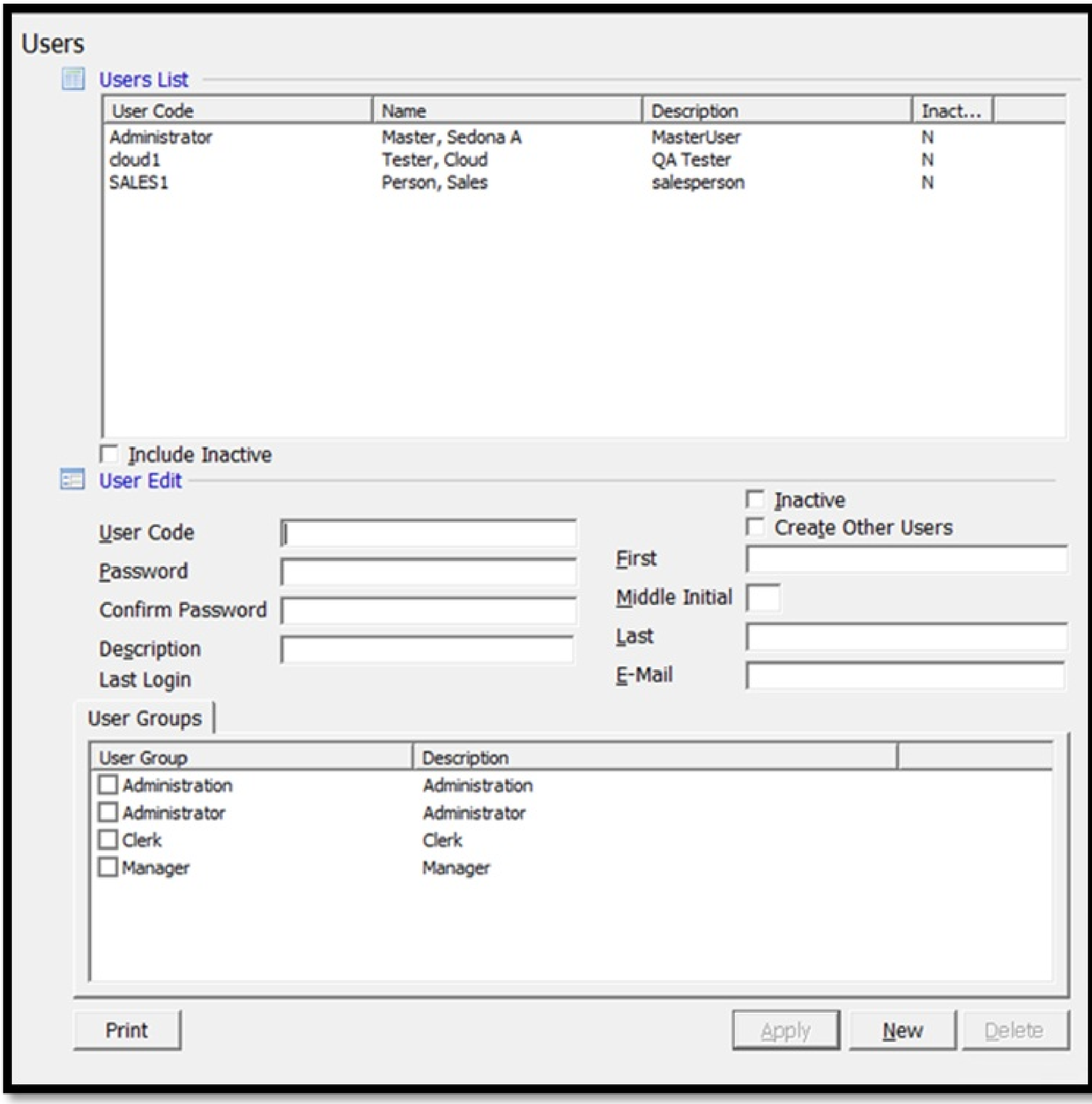
- Labor Units
- Description
- Price
- Available in Sales
- Sales Alt Description
- Service Alt Description
- Purchase Cost



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).



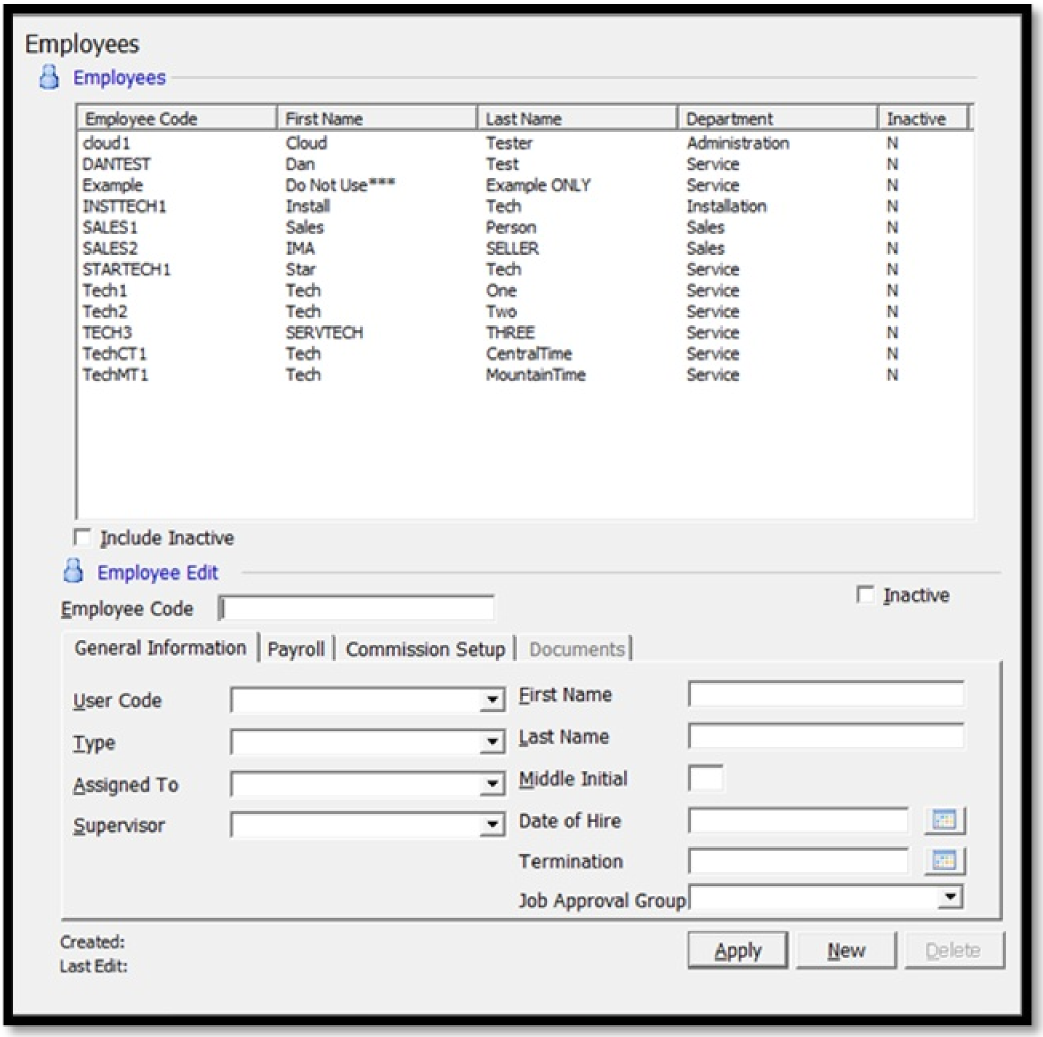
Employees

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)

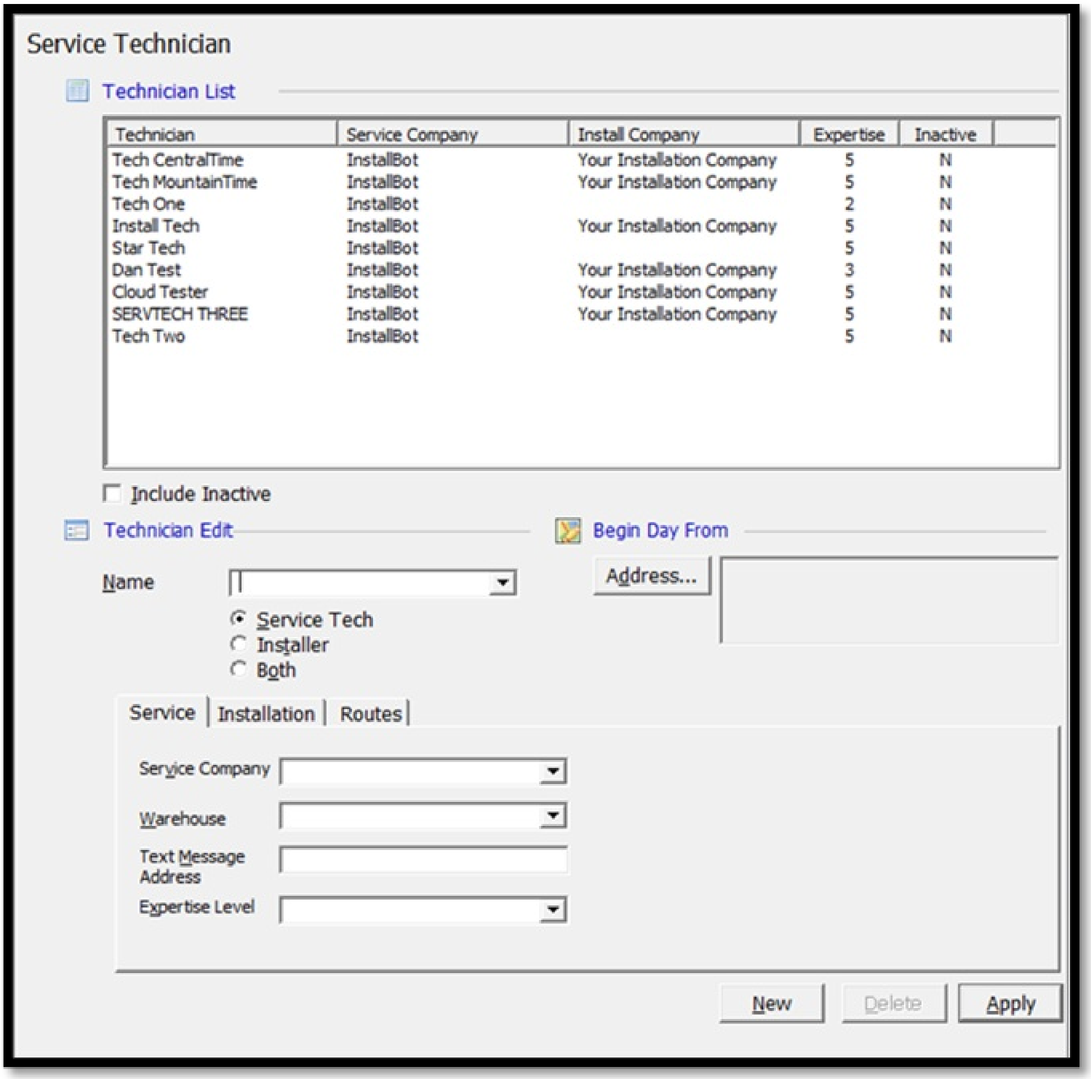


Technicians

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.



Job Types

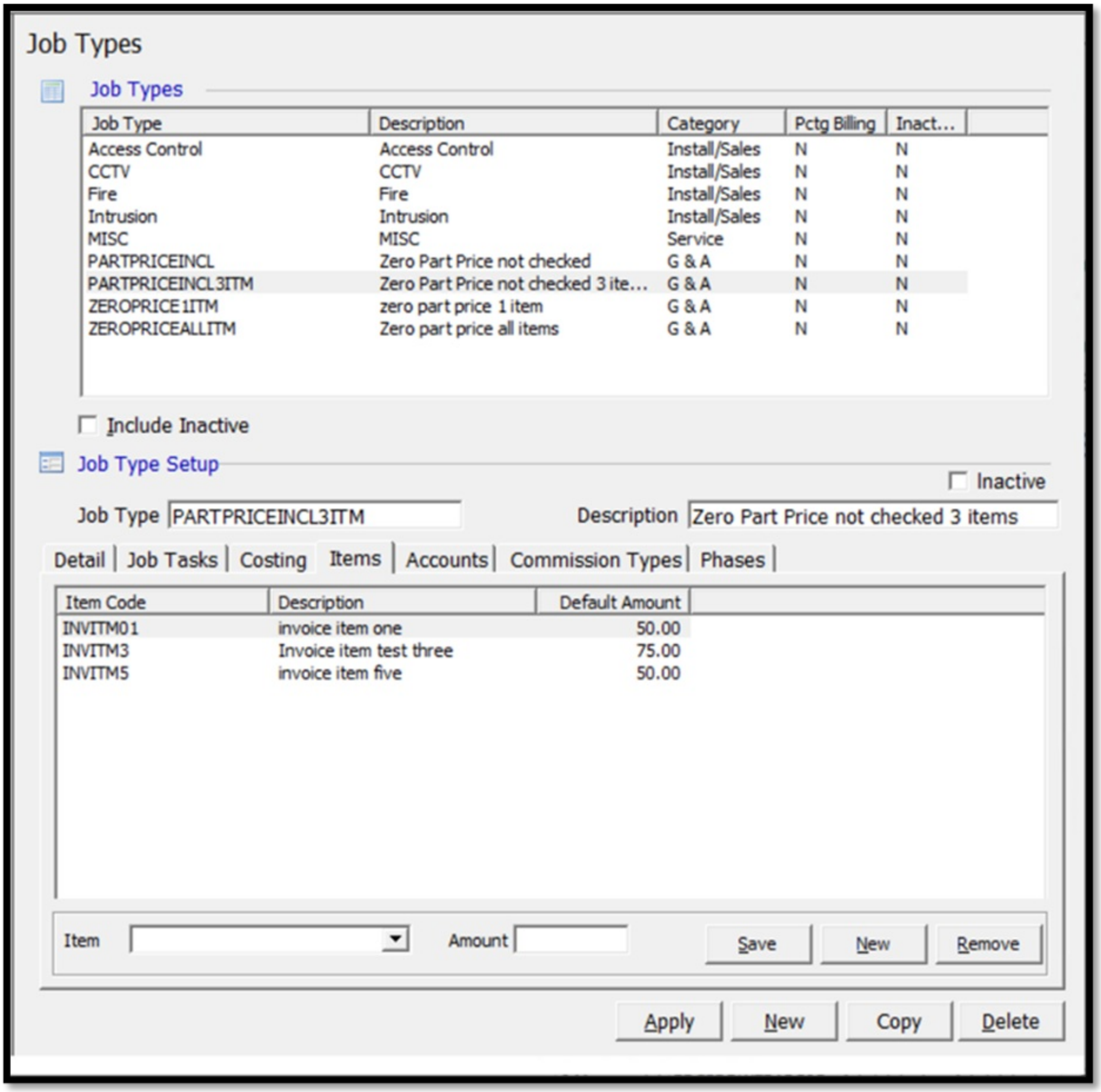
Menu path: Sedona Setup > Job Types

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.



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

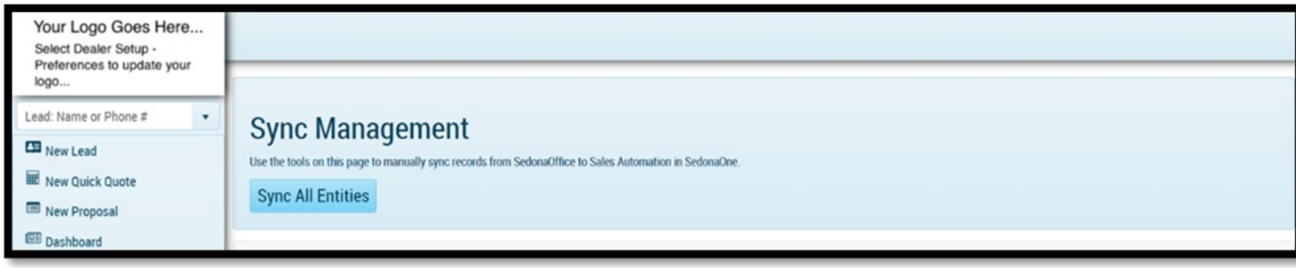
{Views}

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.

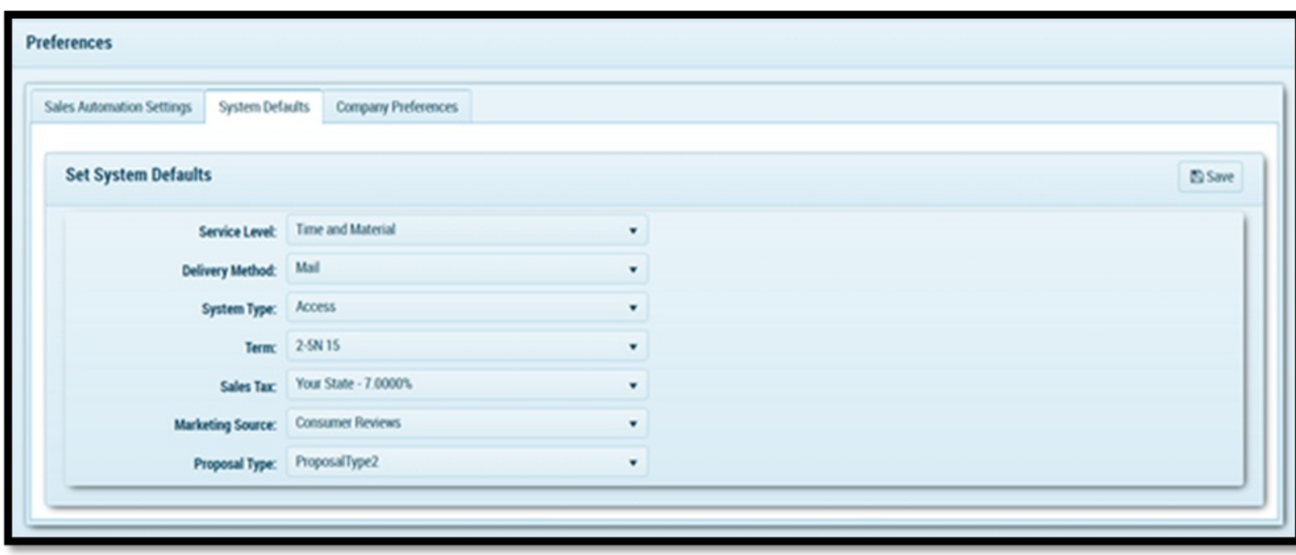


Preferences

Menu path: Setup > Preferences > System Defaults tab

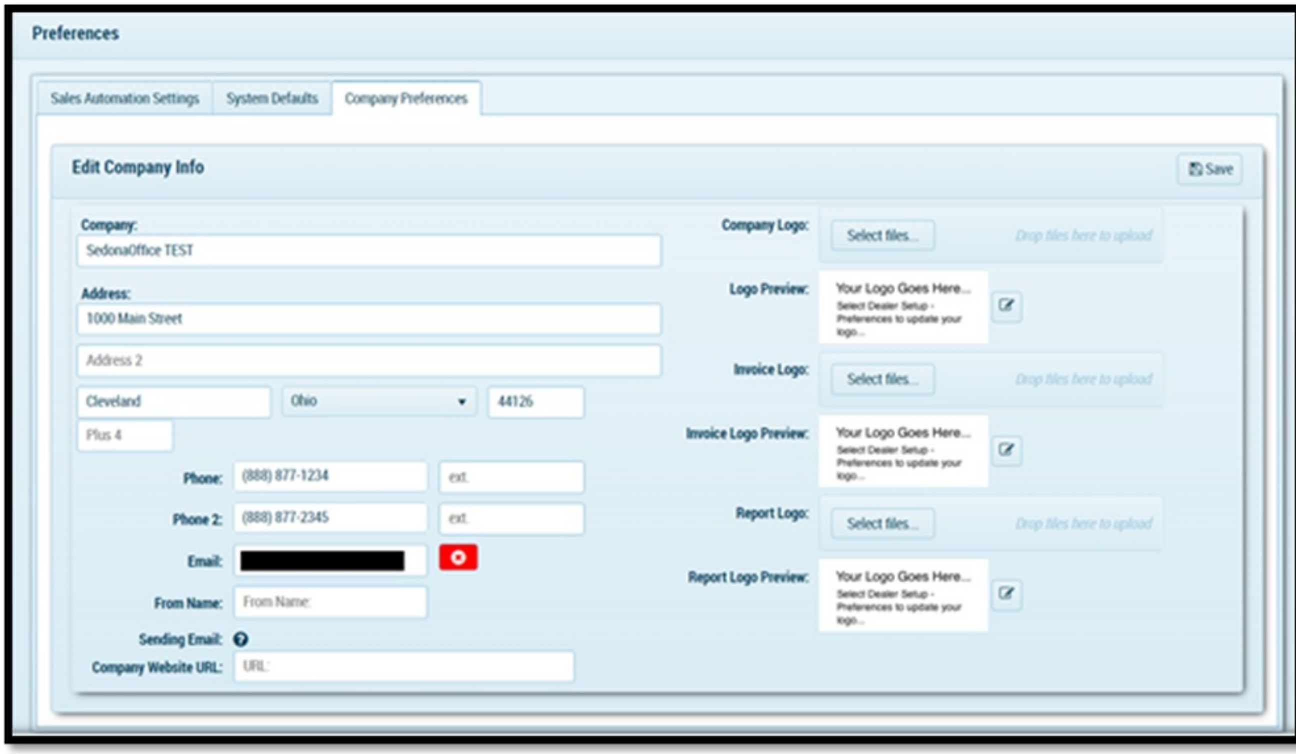
System Defaults – Verify that these fields are defined:

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



Menu path: Setup > Preferences > Company Preferences tab

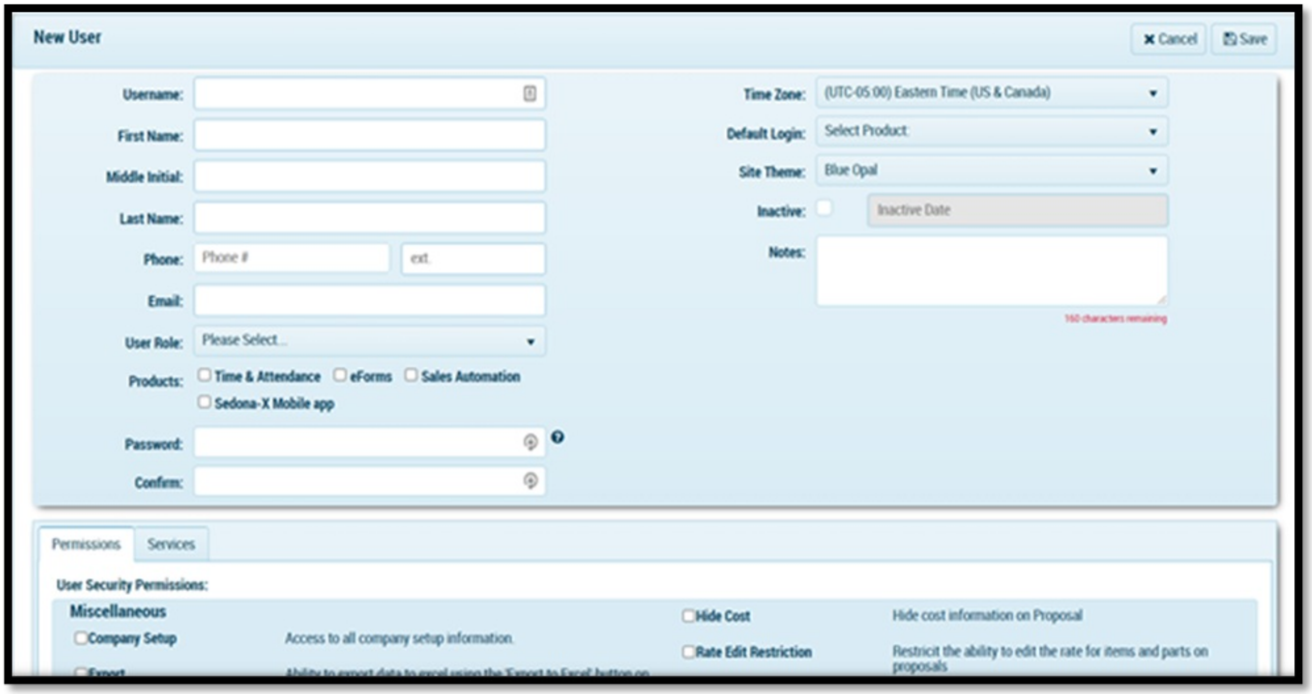
Company Preferences – Verify that the Company Info is complete.



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.



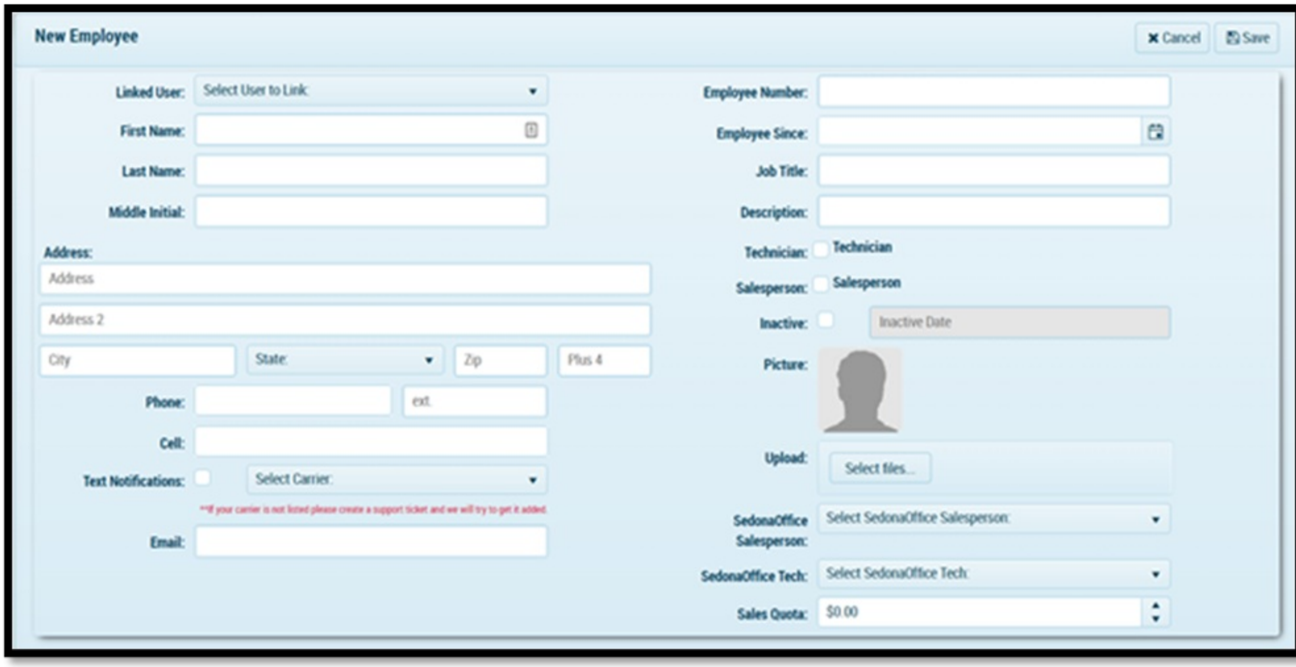
Employees

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.

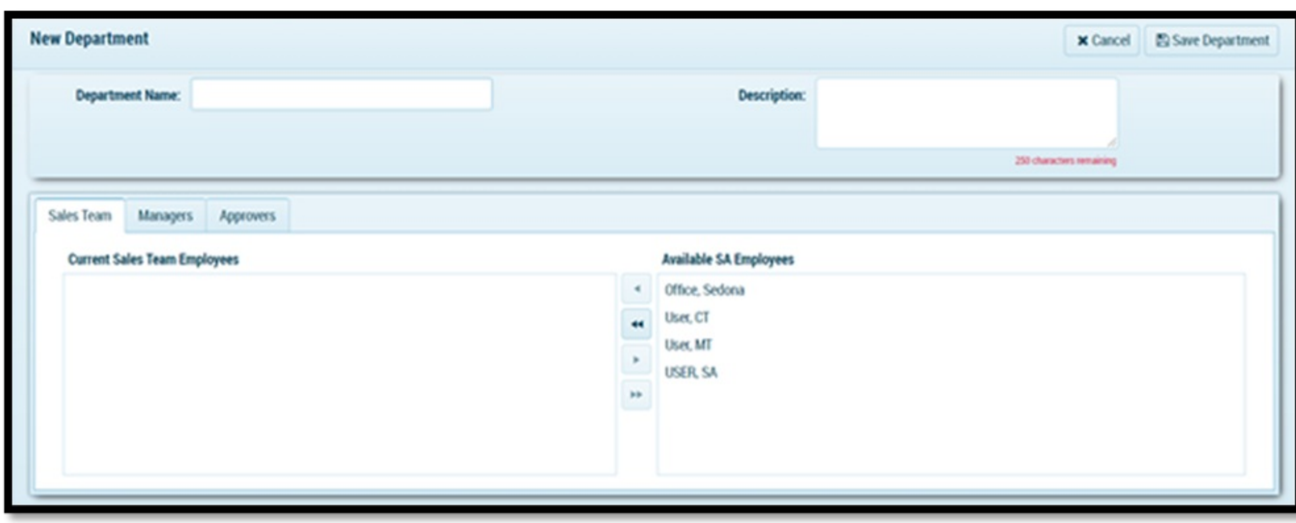


Departments

Menu path: Setup > Departments

Add new or edit existing departments.

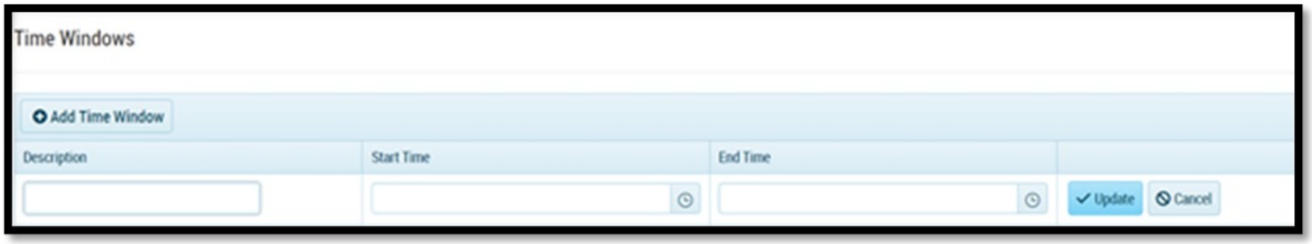
Link user(s) to the departments.



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.



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.

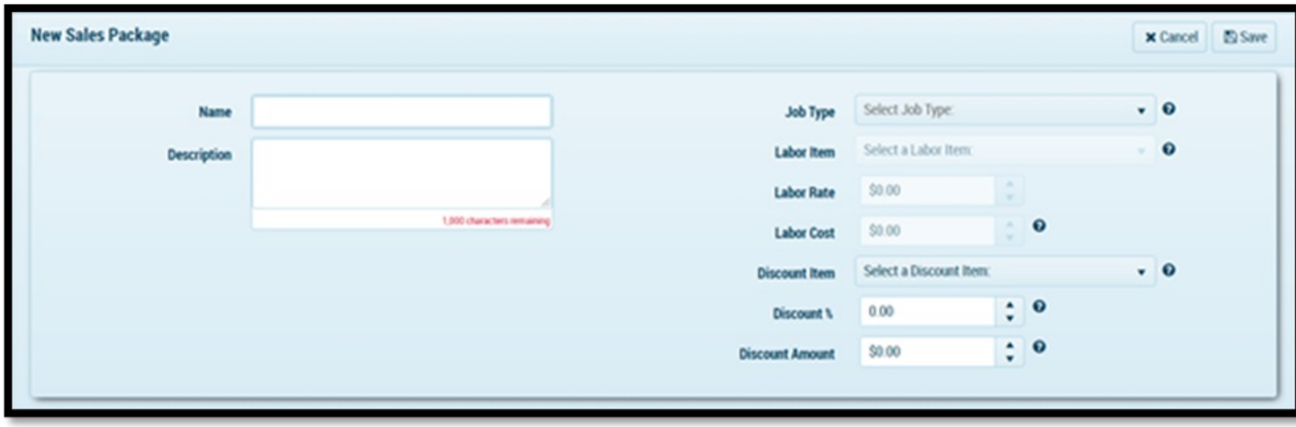
Job Type: Defined in SedonaOffice (details in the SedonaOffice setup defined earlier in this document.)

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.

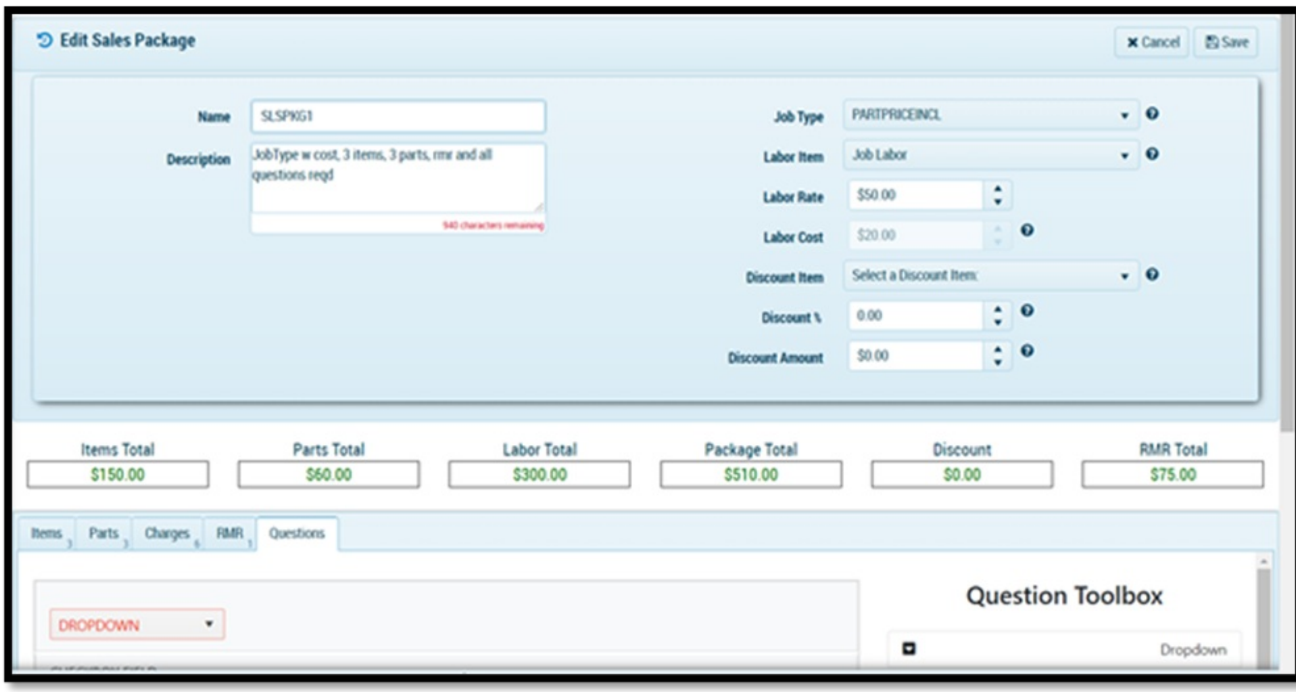
Items selection may be limited based on the Job Type selected.

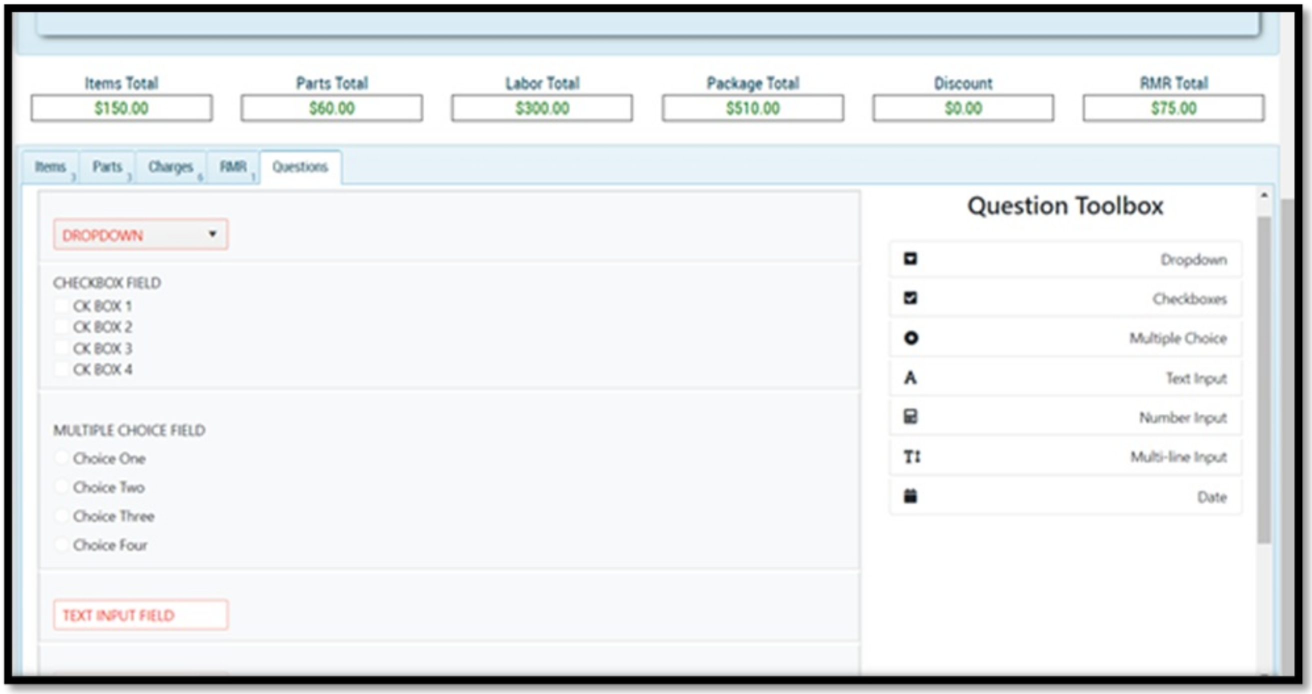
These are some possible scenarios:

- 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 Tab: Questions





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.

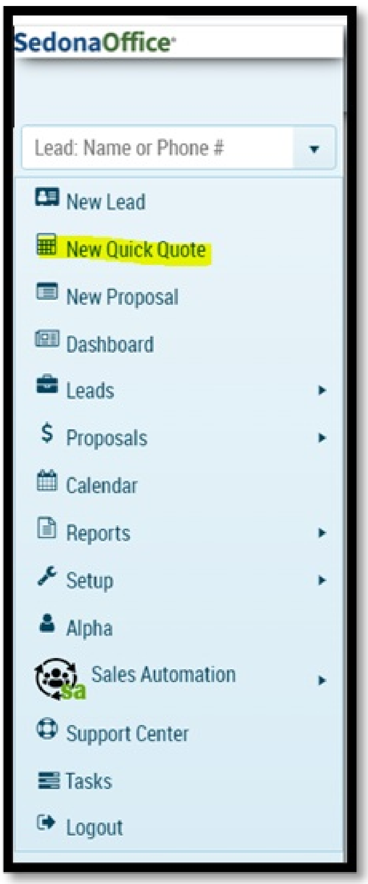
Edit options:

- 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.

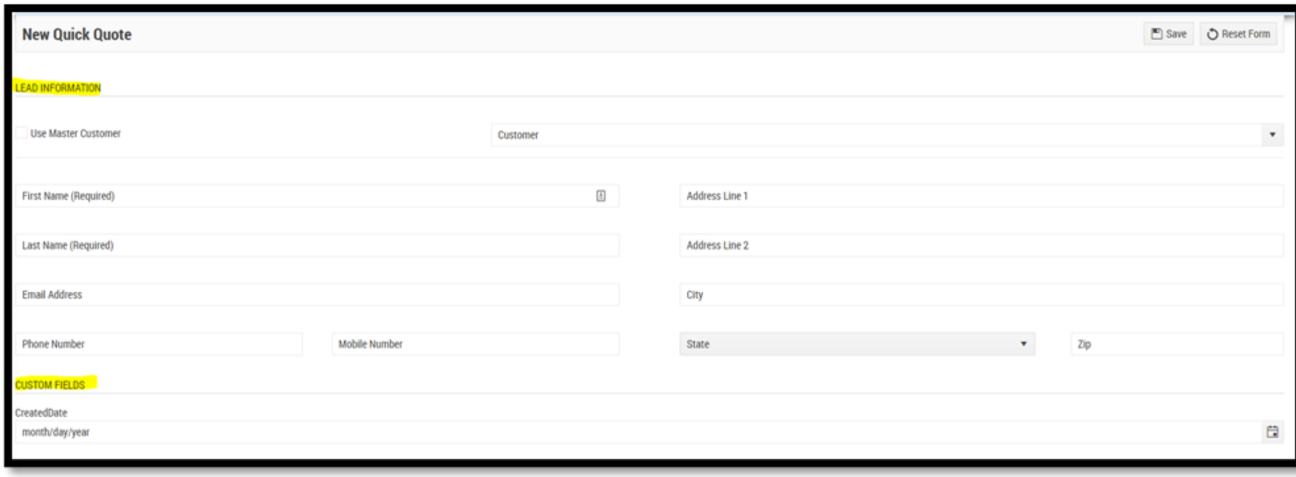
Each option within the question type can have unique text.

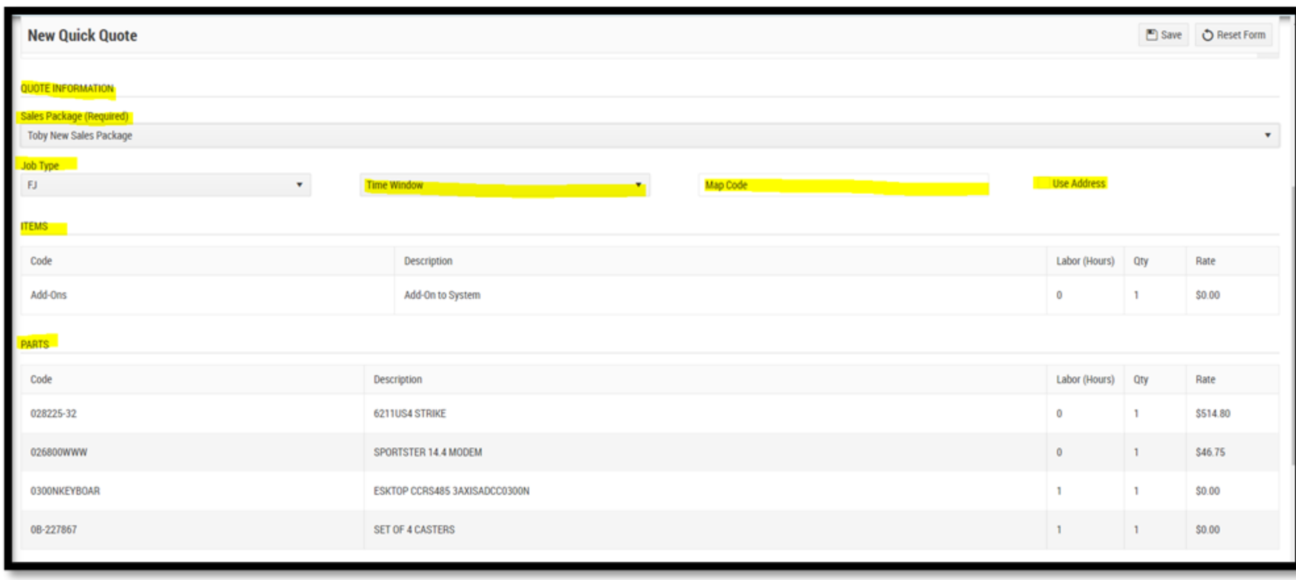
Quick Quote

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.





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:

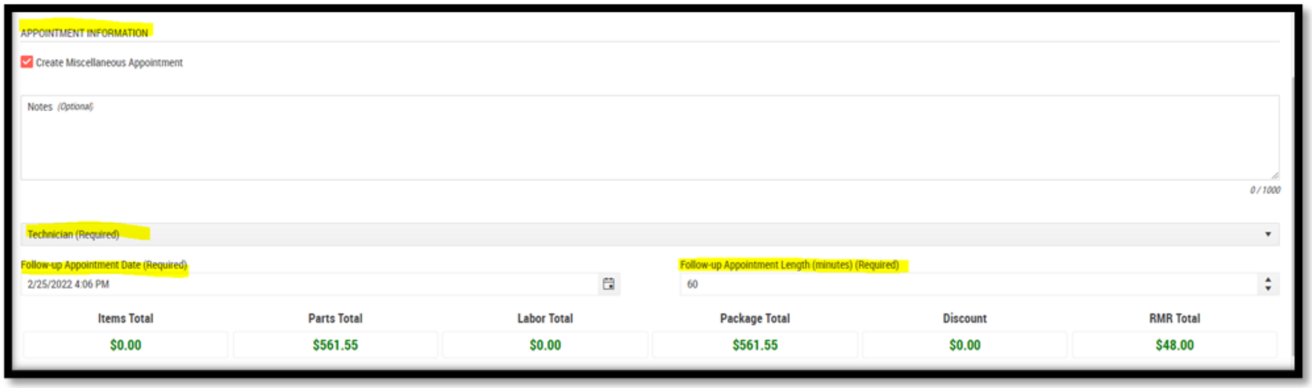
- This includes the parts defined on the Sales Package selected
- A user can change the Labor (Hours), Qty, or both
- Rates cannot be changed

Recurring 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 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.

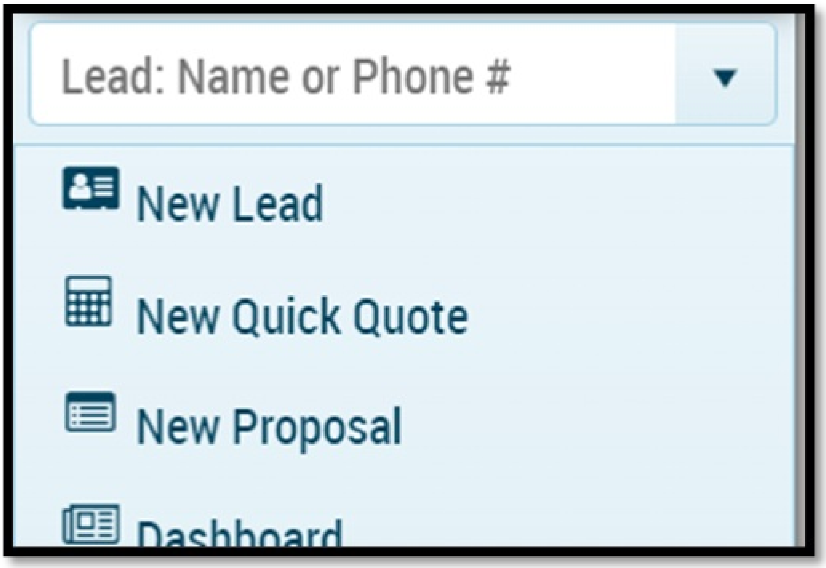
Search

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.

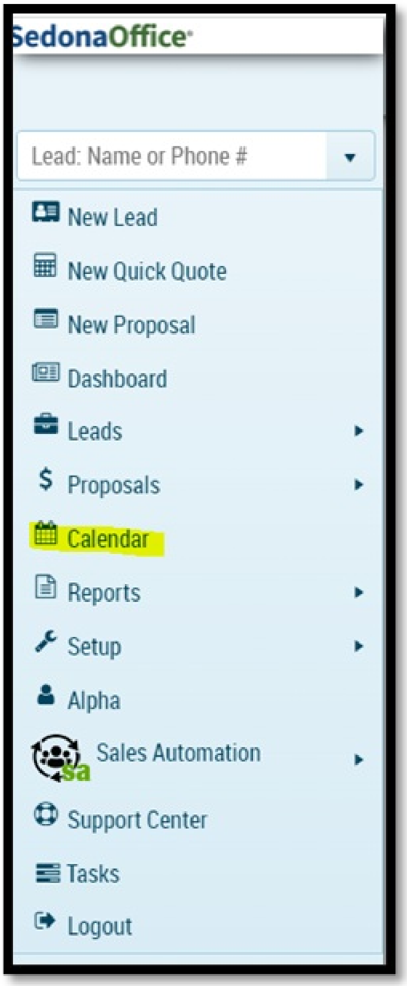
The Department defaults from the first department in the table.sa_aDepartment table of the user entering the quick quote

A user can edit the proposal.

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

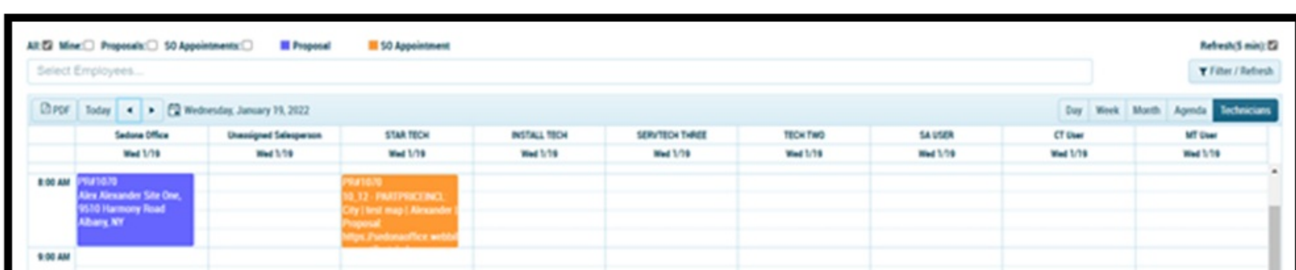
Calendar

Menu path: Calendar



Display Options:

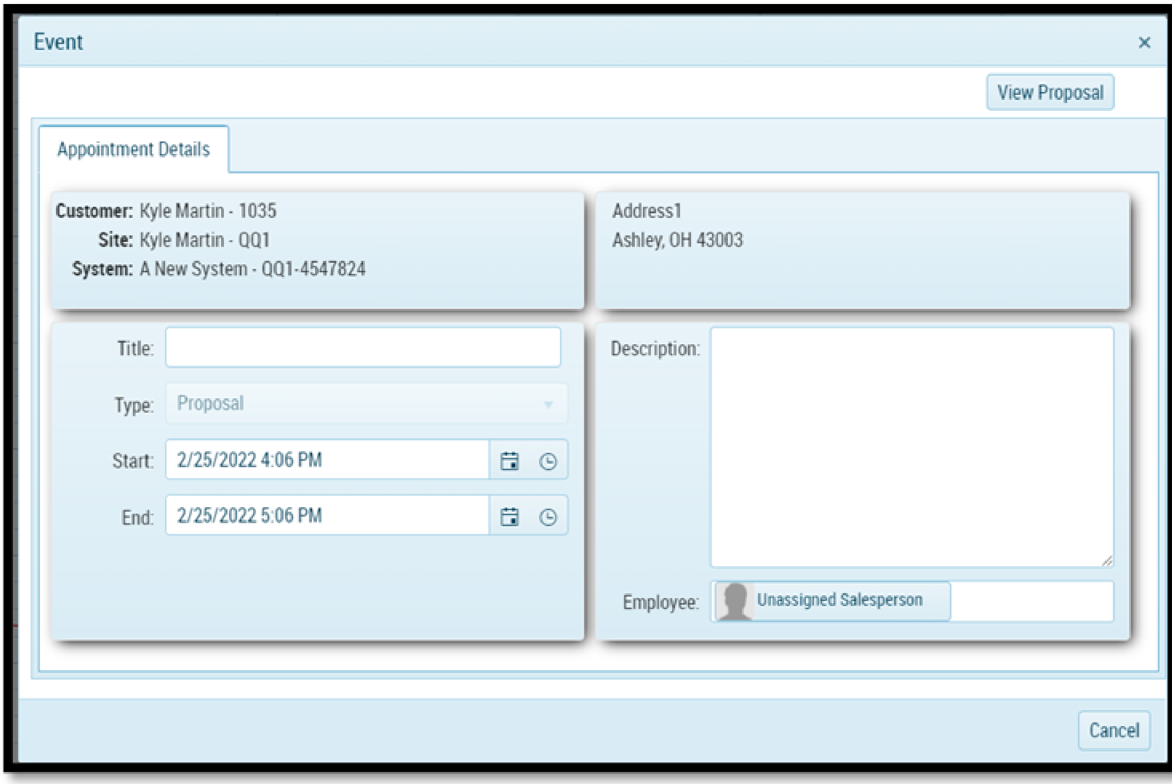
- All: This displays appointments (sales and miscellaneous) for all salespeople and technicians based on the options Day, Week, Month, Agenda, or Technician.
- Mine: This displays the appointments for the current user.
- Proposals: This displays the sales appointments created with the proposal from the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



- 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.