

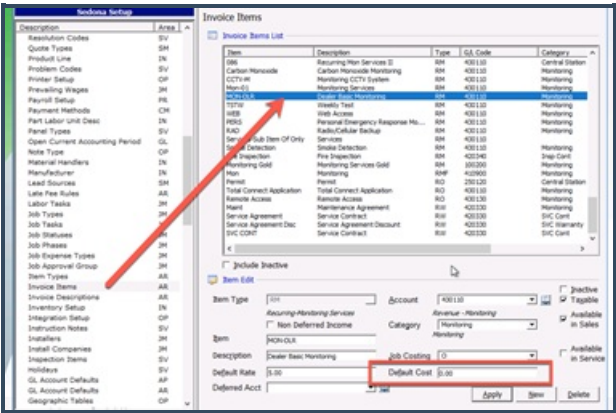
Default Cost from SedonaOffice

12/18/2023 5:34 pm EST

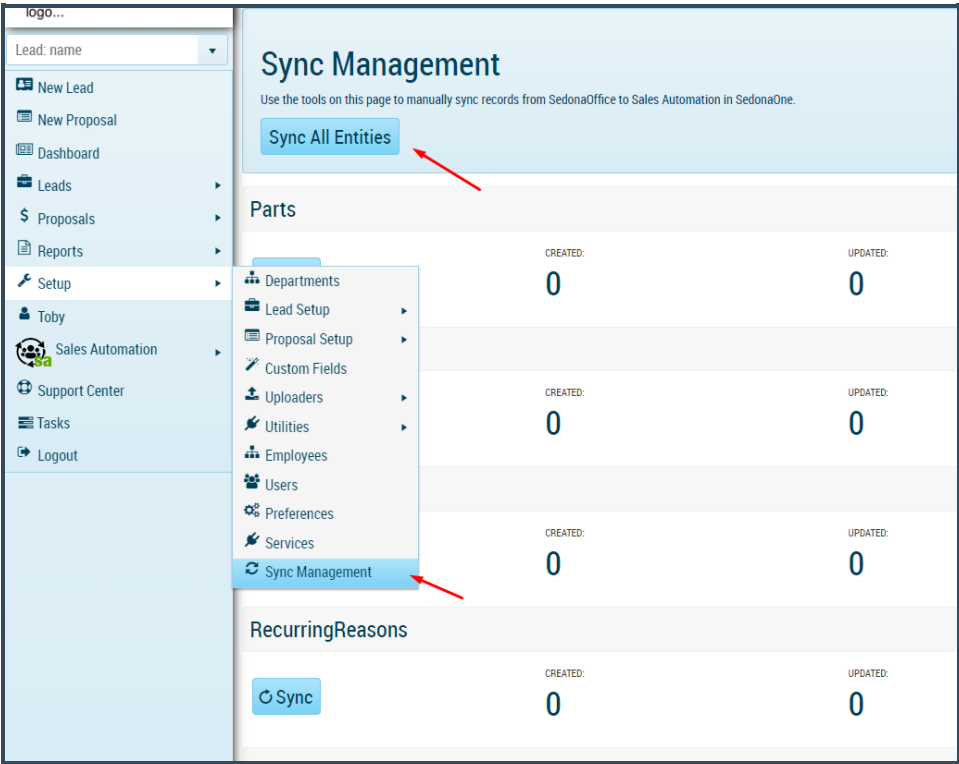
This feature allows SalesAutomation users to see the Default Cost on recurring invoice items as defined in SedonaOffice. It is read-only in SalesAutomation and does not set any other fields. It should be used for reference when setting the recurring cost for the item.

Technical Information

To start, the default cost must be specified in SedonaOffice. This is the only place that this can be set.



Once this is done, the Items must be Sync'ed from SedonaOffice into Sales Automation. This is done through the Setup menu.



The Default Cost from SedonaOffice will then appear when Adding/Editing an RMR item on a Proposal or Sales Package Edit screen.

Edit Proposal # 1003: Bold Technologies, LTD (Tobias Prescott) 05/12/2021

Cancel Save

Show Proposal Detail

Hide SA Summary

Sales Automation

Job Type: Other

Labor Item: Select a Labor Item

Labor Rate: \$0.00

Labor Units: 0.00

Labor Units Override: 0.00

Discount: \$0.00

Discount Item: Select a Discount Item

Payback Months: 0

Sales Price

Items: \$1,060.54

Parts: \$561.11

Labor: \$0.00

Discount: \$0.00

Sales Price: \$1,621.65

Deposit: \$0.00

RMR

Monthly Total: \$75.00

Monthly Monitoring Fees

Net Monthly Total: \$0.00

Item Code	Description	Billing Cycle	Activation	Next Inv.	Monthly \$	Cycle \$	Dependency Note	AltDescription	Edit	Delete
MON	Monitoring	Monthly	05/14/2021		40.00	40.00	this is the DN for ...		Edit	Delete
INVITEM003	Recurring item test	Monthly	05/14/2021		35.00	35.00			Edit	Delete

1 - 2 of 2 Items

Edit

Item: INVITEM003

Last Invoice Date: [Calendar Icon]

Description: Recurring item test

AltDescription: this is the alt description for a recurring L...

Use Cycle Amount: [Info Icon]

Qty Based Billing: [Info Icon]

Billing Cycle: Monthly

Discount: None: 0.00 %

Default Cost: \$6.00

Monthly Amount: \$35.00

Cycle Amount: \$35.00

Dependency Note: [Text Area]

Activation Date: 5/18/2021

Next Invoice Month: 5/1/2021

Update Cancel

Installation

No special installation is needed. Just SalesAutomation and a linked SedonaOffice through SedonaCloud for the full functionality.

Configuration

Viewing Default Cost will be a user Security Permission per user in SalesAutomation setup. The cost will only show if

the Job Type used has 'Zero Part Price' not checked. The only cost/price that is not defaulting is for the Labor Item.

Integration

Requires SedonaCloud integration connected to a SedonaOffice dB.