AlarmBiller - 4.20 Customer Dev Release FAQs

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Item and Part Grouping

Q: How do I create a new group in the charges tab of a proposal/sales package?

A: Navigate to the charges tab, then hit the 'Assign to New Group' button on an item/part you would like to add to the new group. The popup will automatically have the 'Add New' option in the dropdown if there are no groups currently created. If there are already groups created, be sure to select the 'Add New' option. Hit the 'Submit' button on the popup and a new group will be created that you can name, add a description, and mark as whether the group should show a subtotal or not.

Q: How do I ensure that the groupings I created on my proposal show up on my eForm?

A: You need to make sure that the eForm you're utilizing for your proposal has the 'Charges' shared data field on it. Go into the designer for the form you're using, select the charges tab, and then in the options for the field on the right hand side of the designer, select the 'Show Groupings' option.

Q: Can I utilize the grouping feature if I am not utilizing eForms?

A: Not at this time. Eventually, we would like to include this on the default proposal template that the software provides.

Dependency Notes and Alternate Description Fields

Q: Can I display the dependency notes and alternate description fields on the default proposal template the software provides?

A: Not at this time. Eventually, we would like to include this on the default proposal template that the software provides.