

AlarmBiller – Sales Automation – Multiple ways of accepting a proposal

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Proposals can be accepted by working with the office or using the customer portal.

Ways of accepting a proposal:

1. They email or call you back saying they would like to move forward.

In this scenario, you will mark the proposal as Sold and generate the work order or generate the invoice (whichever applies).

2. Customers can log into the customer portal and accept the proposal.

Once the customer accepts the proposal from the portal, you will go into the customer's proposal in question, and push the accept and complete proposal button. Then generate the work order or the invoice.