SedonaSetup - SM - Sales Items

An Opportunity is a summary of all the equipment plus any services being quoted to a Prospect.

Each Opportunity consists of one or more Sales Items which are classified as a Non-Recurring or Recurring type.

Examples of Non-Recurring type Sales Items are the various types of Systems your company quotes and installs.

Examples of Recurring type Sales Items are monitoring or service contracts. You may enter a default rate for any Sales Item if your company typically sells that item for the same price to all Prospects. The default rate may be overridden at the time an Opportunity is created.

Each Sales Item must be linked to an Invoice Item code in the AR Item field. If the Sales Item is a recurring service, check the Recurring checkbox and select the Bill Cycle that is most typical for that particular recurring service.

Note: If your company is using QuoteWerks, you will not be using this setup table.