

Quick Quote Overview

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This new feature allows users to select an existing lead, an existing customer, or create a new lead when only minimal information such as name, phone or email is provided.

- Streamlines the proposal creation for new leads by creating the new lead and proposal in one-step.
- Allows for multiple 'What if' scenarios prior to saving the Quick Quote to a proposal. The user can change the Sales Package, quantities, and/or total labor hours. The totals on the Quick Quote immediately reflect the changes.
- A new Questions Toolbox is only available when creating Sales Packages. These are user-defined fields. The field types available are:
 1. Dropdown
 2. Checkboxes
 3. Multiple Choice [radio buttons]
 4. Text Input
 5. Number Input
 6. Multi-line Input

The user can customize the labels and options of each of the toolbox types. Each Sales Package can have a different set of questions that are pertinent to the package.

Adding Questions to the Sales Package allows the user to define specific questions to ask the prospect/customer to customize the Quick Quote based on the responses provided. The questions toolbox option types can be set to required, to aid the user in gathering the information required by you company, to improve the quality of the quote.

- A new Time Window field on the quote allows the user to define a window of to give the lead/customer as an estimate of when the work can be performed.
- A new Map Code field allows the user to use the address defined or use a custom code on the Quick Quote.