Creating a Quick Quote

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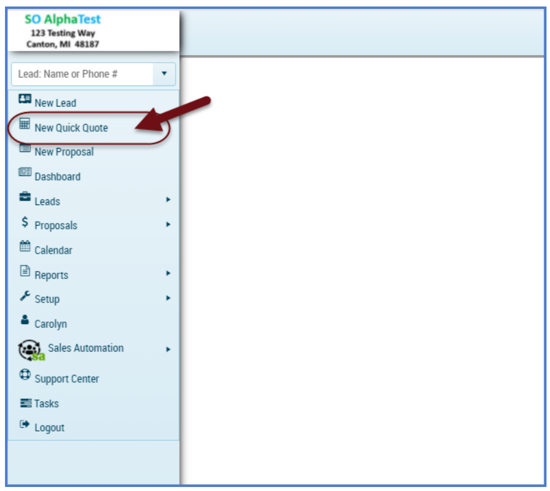
Creating a Quick Quote

When using the New Quick Quote feature, a sales Lead and Proposal are created in one-step to streamline the quoting process.

When creating a Quick Quote, there are multiple data entry forms required – each form will be described in this document section.

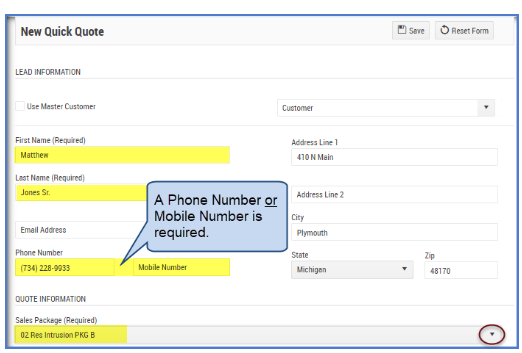
To create a new Quick Quote, follow the instructions below and on the following pages.

1. From the SalesAutomation main menu, click on the New Quick Quote option.



2. The New Quick Quote form will be displayed to the user. A Quick Quote may be created for a new Lead, an existing SedonaOffice customer or a subaccount of a Master account type customer. In our example presented in the following pages, we assume the Quick Quote is for a new Lead.

After selecting a Sales Package, additional information will be displayed below the Lead information.



3. Fill in the data entry fields, and then select the Sales Package from the drop-down list.

When creating a new sales Lead, required fields are required are:

- First Name
- Last Name
- Email or Phone Number
- Sales Package

Note: If you will be emailing the proposal to the lead, you must enter an Email Address into the form.

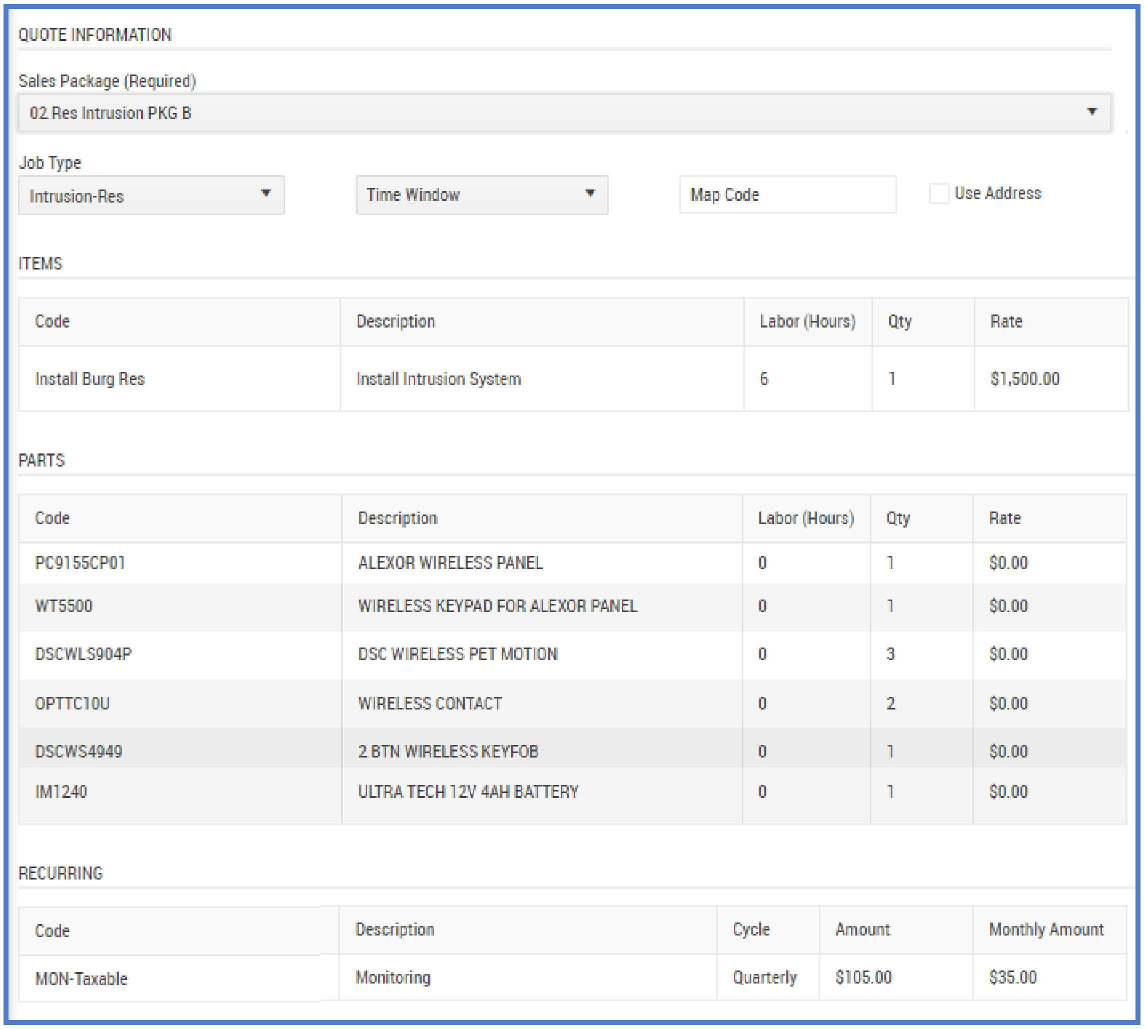
4. After selecting a Sales Package, the Job Type, Items, Parts, RMR and Questions from the selected Sales Package are added to the quick quote.

The user is allowed to change the Job Type. If the Job Type is changed to a job type that does not include the items included by the Sales Package selected, then those items are automatically removed from the quick quote.

To the right of the Job Type field, are three additional data entry options.

- Time Window is optional. This is included in the miscellaneous appointment detail on the calendar.
- Map Code: A user can enter free form text into this field. There is no validation.
- If the Use Address checkbox is selected, then the Map Code field is updated with Address Line 1, City, State, and Zip/Postal from the Lead Information section of the Quick Quote.

Custom Fields section: If a custom field (Setup > Custom Fields) is defined with the Entity Name = Proposal, then the custom field appears on the Quick Quote form.



QUOTE INFORMATION

Sales Package (Required)

02 Res Intrusion PKG B

Job Type

Intrusion-Res

Time Window

Map Code

Use Address

ITEMS

Code	Description	Labor (Hours)	Qty	Rate
Install Burg Res	Install Intrusion System	6	1	$1,500.00

PARTS

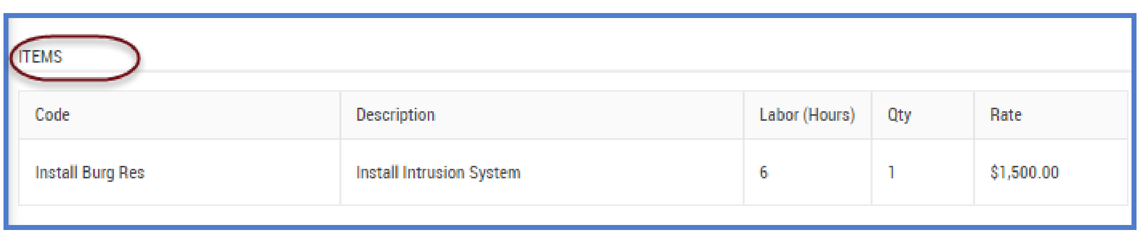
Code	Description	Labor (Hours)	Qty	Rate
PC9155CP01	ALEXOR WIRELESS PANEL	0	1	$0.00
WT5500	WIRELESS KEYPAD FOR ALEXOR PANEL	0	1	$0.00
DSCWLS904P	DSC WIRELESS PET MOTION	0	3	$0.00
OPTTC10U	WIRELESS CONTACT	0	2	$0.00
DSCWS4949	2 BTN WIRELESS KEYFOB	0	1	$0.00
IM1240	ULTRA TECH 12V 4AH BATTERY	0	1	$0.00

RECURRING

Code	Description	Cycle	Amount	Monthly Amount
MON-Taxable	Monitoring	Quarterly	$105.00	$35.00

5. Items section: This section includes the items defined on the Sales Package selected. If the Job Type is changed to a job type that does not include the items included in the Sales Package selected, then those items are removed from the quick quote.

A user can change the Labor (Hours), Qty, or both. Rates cannot be changed.



ITEMS

Code	Description	Labor (Hours)	Qty	Rate
Install Burg Res	Install Intrusion System	6	1	$1,500.00

6. Parts section: This includes the parts defined on the Sales Package selected.

A user can change the Labor (Hours), Qty, or both. Rates cannot be changed.

PARTS

Code	Description	Labor (Hours)	Qty	Rate
PC9155CP01	ALEXOR WIRELESS PANEL	0	1	$0.00
WT5500	WIRELESS KEYPAD FOR ALEXOR PANEL	0	1	$0.00
DSCWLS904P	DSC WIRELESS PET MOTION	0	3	$0.00
OPTTC10U	WIRELESS CONTACT	0	2	$0.00
DSCWS4949	2 BTN WIRELESS KEYFOB	0	1	$0.00
IM1240	ULTRA TECH 12V 4AH BATTERY	0	1	$0.00

7. Recurring Section: This includes the recurring items (RMR) defined on the Sales Package selected.

A user cannot change the Cycle or Amounts.

RECURRING

Code	Description	Cycle	Amount	Monthly Amount
MON-Taxable	Monitoring	Quarterly	$105.00	$35.00

8. Additional Information Section: This includes the Questions from the Sales Package selected. Any required questions are marked.

ADDITIONAL INFORMATION

Why Looking? (Required)

Recent Break-in

Product/Service Interest (Required)

- [x] New Intrusion System
- [ ] Replace Existing System
- [x] Monitoring
- [x] Service Agreement

Quote Due Date (Required)

3/7/2022

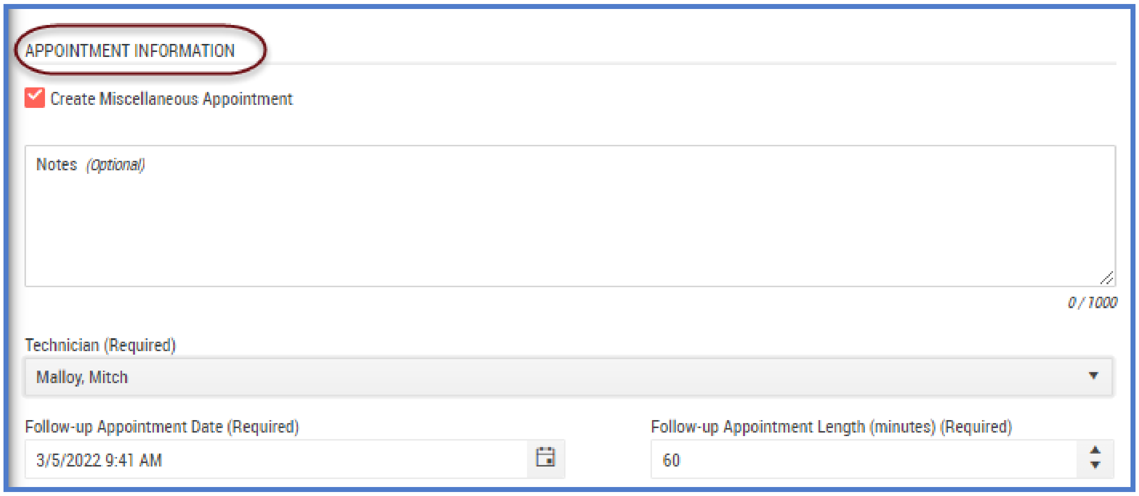
Estimated Install Date (Required)

3/10/2022

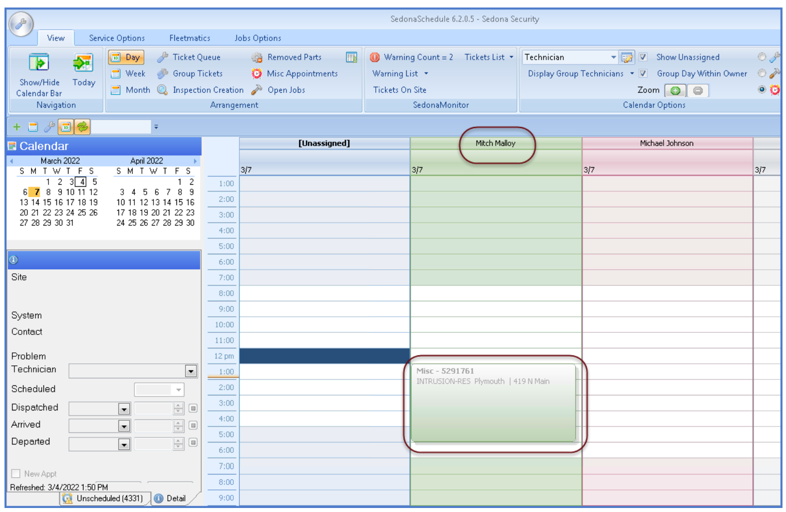
9. Appointment Information Section:

- Create Miscellaneous Appointment checkbox: If selected, you must select a Technician from the drop-down list, select a Follow-up Appointment Date, and enter the number of minutes for the appointment. Upon a successful save of the Quick Quote, a miscellaneous appointment will be created in SedonaOffice on the Schedule Board for the date/time specified on this form.
- In the Notes field, you may type in up to 1,000 characters of text. If this proposal results in a sale, when converting

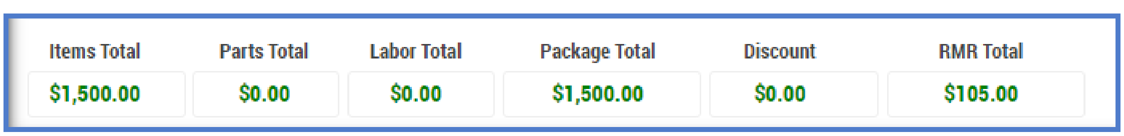
the Lead/Proposal into a SedonaOffice customer and Job, the notes will write to the Job Notes list in SedonaOffice.



Below is an example of a Miscellaneous Appointment in SedonaOffice that was created from a Quick Quote.



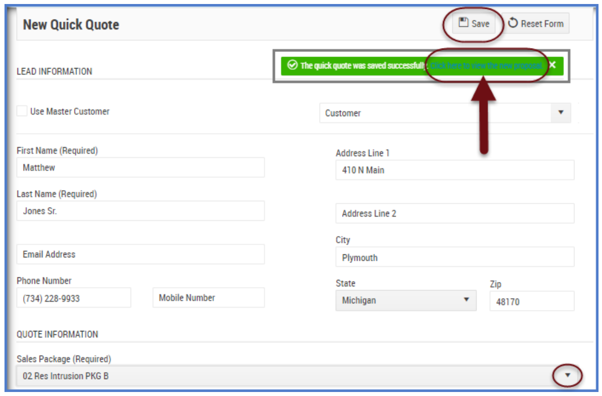
10. Total fields appear at the bottom of the Quick Quote form. This includes Items Total, Parts Total, Labor Total, Package Total, Discount, and RMR Total.



11. When finished entering all information, click the Save button at the upper right of the form. If all required information in the Quick Quote is provided, a Proposal record is created. If required information is missing, then the field turns red with a tool tip indicating the information is required.

Upon a successful save, a message will be displayed – “The quick quote was saved successfully”. The message is followed by a hyperlink - "Click here to view the new proposal". Clicking the link opens the new proposal created from the quick quote.

Note: After a successful save, a user can edit the Quick Quote and Save again to submit an additional proposal - this generates a new proposal. For example, if the same lead/customer wants several different proposals for different configuration options. One proposal includes 6 CCTV cameras and 4 fire alarms, but the other proposal only has 2 CCTV cameras and remote keypad entry on 2 doors.



Reset Form Button

This clears the values on the Quick Quote form. If a user is entering multiple quotes to different lead/customer with different sales packages, it is best to start with a fresh form. If a user is entering a second quick quote for the same lead/customer and is just making minor changes to the new quick quote, then they would make the changes on the existing form instead of clearing all the data and starting over.