Proposal Setup

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Navigate to the proposal setup menu to setup the following details that will be key in creating proposals. All of these fields sync and pull data directly from AlarmBiller/SedonaOffice.

- *Items*: Create a list of any intangible products that can be added to aproposal. This includes but is not limited to goods or services such as tax, inspection services, or monitoring services.
  - *Proposal Items*: Items that are billed to customers.
  - *Vendor Purchase Items*: Items that are purchased from vendors.
- *Parts*: Create a list of any tangible products that can be added to aproposal. This includes but is not limited to goods or services such as cameras, sensors, or keypads.
- *Categories*: Create a list of categories with subcategories to group or organize the items and parts offered to customers. These categories can be linked to their corresponding items(s) and part(s). Categories can also be added as you are setting up new items and parts if the list of categories has already been created.
- *Manufacturers*: Create a list of manufacturers for the parts offered to customers. These manufacturers can be linked to their corresponding part(s) in the parts list. Manufacturers can also be added as you set up new parts.
- *Recurring Reasons*: Create a list of reasons that will be used to describe why a charge is recurring. This list will also be used to describe the reason for cancelling a recurring charge.
- *System Types*: Create a list of the types of systems offered to customers. For example, system types can be burglar alarms, fire alarms, etc.
- *Terms*: Create a list of the payment term options available to customers. Add each term code (or name) and specify the "Days Net Due" (or period of time a customer has from the invoice date to settle the balance).
- *Sales Tax*: Create a list of tax rates applicable to customers. Identify the tax code (must be a unique code), a brief description, identify if the tax rate applies to recurring or non-recurring items, link the respective GL account, and enter the tax rate. If you are setting a single tax that will apply to all customers, check the box marked "Base". *NOTE*: If you know in advance that a sales tax rate will be changing, you can set the new rate by adding a new sales tax line and setting the "Rates" option to begin on the effective date. **You will also need to change the "Rates" option on the original sales tax line to end the day before the new rates goes into effect**.
- *Sales Packages*: Create "bundles" for items and/or parts that are frequently sold together and assign them default values (rate). This creates a convenient way for the sales team to assemble proposals. *NOTE*: The predefined contents of a Sales Package and their values can be edited after being added to a proposal.
- *Proposal Status*: Identify the different statuses that each proposal will go through. Define a status code, brief description, the action associated with the status, and closing percent (or progress of the proposal for that status).