

Services

Last Modified on 09/21/2018 11:14 am EDT

Navigate to the services setup menu to configure the integration and allow syncing of information between the Sales Automation tool and AlarmBiller/SedonaOffice. Define the endpoint to integrate with and authenticate the user(s). This integration will pull the key details from AlarmBiller/SedonaOffice into Sales Automation and push completed proposal details back to AlarmBiller/SedonaOffice. Some of the details being synced include customers, systems types, items, parts, terms, recurring reasons, and sales tax.

The Services setup is only editable by admins.

□
□