Commitment to Sale

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Once a customer accepts and signs off on a proposal, you will have the option to convert the proposal and generate a job. All parties associated with the proposal will be notified when an eForm is signed and submitted. If there isn't an existing customer associated with the job, a customer wizard will pop up collect the customer information required to create a new site/system. If you selected an existing customer when creating the lead, you will have the option of creating a new site/system, if needed. The Integration Wizard pushes the customer data from the Sales Automation tool to AlarmBiller/SedonaOffice. From here, you can view all the job details data that was sent to AlarmBiller/SedonaOffice.

If the proposal is rejected, the proposal status should be updated accordingly. The reason for the rejection can be tracked using custom fields.