



ServiceLedger Getting Started Guides

Getting Started with the Quote Manager

The Quote Manager allows you to track the quotes and sales estimates you give to customers and prospects and allows you to track and forecast each quote, track reason codes on why you win or lose business, and convert the quote into work orders, agreements or invoices.

Quote Administration:

The following administrative options are available to help you get the most out of the Quote Manager of ServiceLedger. While the options are optional, it is recommended that you take advantage of these features to get the most out of the Quote Manager.

Creating Quotes:

You can create a quote for any account from the account record by clicking on the **Add Quote** action button or by going to **Service | Quotes** from the **Navigator** to view existing quotes and add new quotes.

Click on the  **Add New Record** button to add a new quote.

Quote 106

Customer: Balak, Mike Sales Rep.: ADMIN Status: Pending

Service Site: Main Quote Title:

Details Tasks Groups Scope of Work Quote Text Notes Competitors History

Details

Exp. Close: 12/23/2011 Sales Stage: 10. Lost Probability: 0.0%

Quote Type: New Quote Total: \$0.00 Forecast Total: \$0.00

Project #:

Add Quote Item Remove ↑ ↓

Drag a column header here to group by that column

Qty	UoM	T. Qty	Item #	Description	Price	Ext Price	Ext Cost	Group	Task	Tax	Opt	%
<No data to display>												

Total: \$0.00 Cost: \$0.00 Forecast: \$0.00 Profit: \$0.00 / 0.00% Task Dur.: 0.00

1. Select the **Account** you are creating the account for.
2. Select the **Service Site** the quote is for.
3. Enter a **Quote Title**. This can be any free-form text you wish to enter.
4. Enter a **Type** of quote if you wish to report on the different types of quotes you are providing. You can add additional types by clicking on the **Type** hyperlink and adding new quote types.
5. Enter the **Sales Stage** the quote is in. This is useful for forecasting and you can update sales stages with probability of closing percentages for more accurate forecasting. You can add your own sales stages by clicking on the **Sales Stage** hyperlink button and adding a stage and probability percentage.
6. Enter the **Exp. Close Date**. This is the date you expect the quote to be closed by and is used in forecasting.
7. The **Quote Total** is read-only and is calculated automatically based upon the items you add to the quote.
8. The **Probability** is used for tracking probability of close percentages and is used to calculate **Forecast Totals**. It may automatically be set by the Sales Stage if you enter Probability % for each sales stage.
9. The **Forecast Total** is a read-only field and is calculated automatically based upon the **Quote Total** times the **Probability %**.

10. Enter the **Rep** that is responsible for the quote. By default, it will default to the user who creates the quote OR you can overwrite with a new representative.
11. Click the **Save** button to save the quote.

Adding Quote Items:

Click on the **Add Quote Item** button to add new quote items to the quote. This is where you can add one or multiple items to the quote.

1. Select the **Item ID** you are quoting.
2. Use the default description for the item or update the **Description** for the item you are quoting as necessary.
3. Select the **QTY** of the item you are quoting for.
4. Select the **D/M Type** you want to use. By default it is set to **None** that will pull the default price from the item file. **D/M Type** is **Discount** or **Markup** and is used to either discount off of the price or markup off of the cost. If you select **Discount**, it will discount the default price by the percentage you enter. If you select **Markup**, it will markup the default cost by the percentage you enter.
5. If you use **Discount** or **Markup**, you can enter the percentage you want to discount or markup the item.
6. The **Price** is the price you are quoting the item for.

7. The **Base Price** is the default price pulled from the item file and is read-only and is used to compare the actual price quoted to the default price of the item.
8. The **Cost** is the cost of the item you are quoting for to track profitability of the quote.
9. The **Base Cost** is the default cost pulled from the item file and is read-only and used for calculating markups on cost.
10. **Ext. Price** is read-only and is calculated automatically based upon the **Qty** times **Price**.
11. **Ext. Cost** is read-only and is calculated automatically based upon the **Qty** times **Cost**.
12. If the item needs to be purchased when you convert the quote into a job, you can click on the **Add to PO** checkbox to flag ServiceLedger that the item needs to be purchased when the quote is converted to a job.
13. If the item is taxable, you can click on the **Taxable** checkbox to flag ServiceLedger that the item is taxable. By default, it will be checked or unchecked based upon if you setup the item to be taxable or not.
14. If you want to add the item as an option and do not want it to update the **Quote Total**, you can click on the **Optional** checkbox to add it as an option. Optional items are only used to inform the customer on the quote of options they can elect with the price, however it does not quote them for the item on the quote. All optional items are included on the quote under **Optional Items**. If they elect an optional item, you will need to uncheck it prior to converting the quote into a job or invoice to add it to the job or invoice.
15. Click **Save & New** to add more items or **Save & Close** when you are finished adding items.

Adding Agreement Items to Quotes:

If you add agreement items to a quote, you have the ability to have ServiceLedger automatically create the agreement record for you when you convert the quote. As a time-saving step, you can add the **Agreement Plan** to the item so when you convert it to an agreement there will not need to be any additional information required for the agreement. Any item you have defined as a service plan or recurring item when you create the item will provide you with the option to add an agreement plan when you convert the quote to an agreement.

For more information on Agreements and Agreement Plans, see **Getting Started on the Agreement Manager**.

Tracking Quote Notes:

The **Notes** tab allows you to track notes specific to the quote. You can click on the **Add Date/Time Stamp** button to date, time and user stamp any notes added to the quote.

At the bottom of the Notes tab you can view information like **Reason Code** (why you won or lost the business) with a **Reason** (more detailed information) as well as the **Create By User**, **Create Date**, **Closed By User** and **Closed Date** fields.

The screenshot displays the 'Quote 106' window in ServiceLedger. The window title is 'Quote' and it includes a standard toolbar with icons for 'Save & Close', 'Save', 'Print', and 'Actions'. The main content area shows the quote details: 'Quote 106' with a status of 'Pending'. Fields include 'Customer: Balak, Mike', 'Sales Rep.: ADMIN', 'Service Site: Main', and 'Quote Title'. Below these are tabs for 'Details', 'Tasks', 'Groups', 'Scope of Work', 'Quote Text', 'Notes', 'Competitors', and 'History'. The 'Notes' tab is active, showing an 'Add Date/Time Stamp' button and a large empty text area. At the bottom of the Notes tab, there are fields for 'W/L. Code', 'Reason', 'Created By: ADMIN', 'Create Date: 11/23/2011', 'Closed By', and 'Close Date'. A summary bar at the very bottom shows: 'Total: \$0.00 Cost: \$0.00 Forecast: \$0.00 Profit: \$0.00 / 0.00% Task Dur.: 0.00'.

Adding Quote Text:

ServiceLedger allows you to manually enter quote text that will print at the bottom of the quote you print out of ServiceLedger or to copy templates you have already created. This is most often used to add terms and conditions to the quote.


Click on the **Quote Text** tab to either manually enter the quote text or copy existing text into the field. Click on the **Copy** button to copy an existing text template into the quote. (See **Getting Started with the Administration Manager** for more information on creating text templates.)




Tracking Quote Competitors:

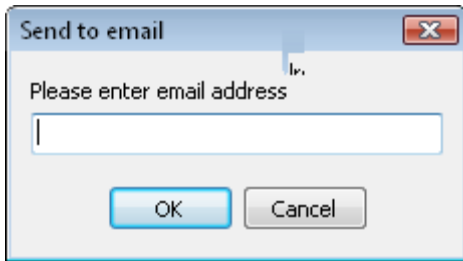
This is a free-form field where you can store competitive information or use as you wish. The information entered is specific to the quote and is not used anywhere else in the system.

Printing & Emailing Quotes:

You can print quotes by clicking on the  **Print** button at the top of the quote record. Optionally, you can elect to print quotes with pricing, without pricing and with sales taxes by clicking on the down arrow and selecting the quote you wish to print. For example, if you provide your customers with a job quote and do not wish for the customer to see the individual line item pricing, you can print the quote without line item pricing and the customer will see the items and only a total for the quote.

You can email quotes by clicking on the  **Email** button at the top of the quote record. When you email quotes, it will convert the quote automatically to a .pdf document that the customer can open using a PDF Reader.

When emailing a quote, you can add a short message to the email by entering the message in the **Message** box and clicking **OK** to send.



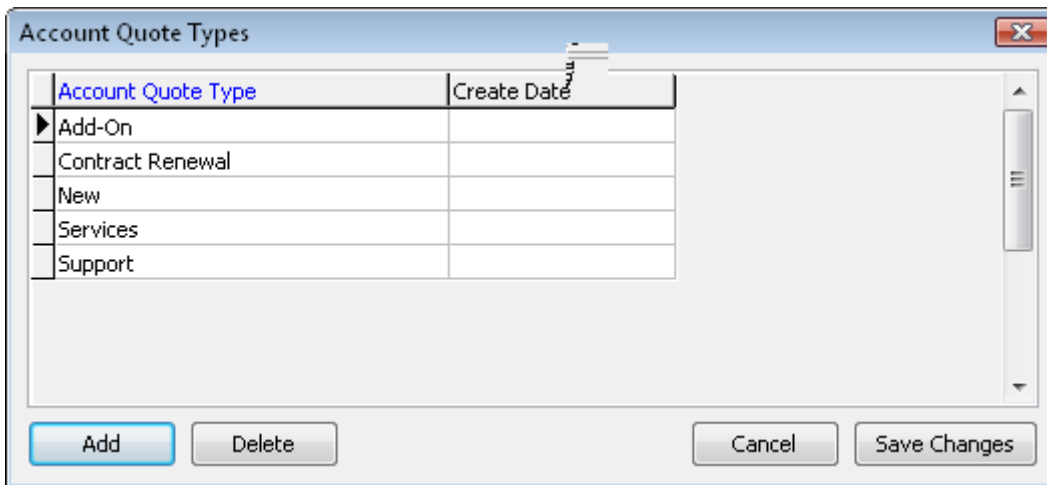
Creating Quote Types:

Quote Types allow you to categorize your quotes and report on different types of quotes. By creating Quote Types, you can run reports on the different types of quotes in your system instead of having to deal with all quotes.

To add Quote Types or view existing quote types you have in the system, click on **Quote Type** link from within the quote .

Click on the **Add** button to add a new type and type in the name for the quote type. Click the **Save** button to save the quote type.

Note: You can start by editing existing quote types if you elect not to use any of the default quote types in ServiceLedger before adding new ones. You cannot delete quote types once they are created.



Creating Quote Sales Stages:

Sales Stages is a very useful feature in ServiceLedger to let you know where you are at in the sales stage on any quote. Many companies learn from experience based upon certain milestones on how close the quote is to being closed and as certain milestones are crossed the probability that the quote will be won. Using

this feature will help you in your forecasting and allow you to have greater accuracy in how you forecast your quotes.

To add Sales Stages, click on **Sales Stages** link from within the quote to view existing sales stages in the system.

Click on the **Add** button to add a new sales stage.

Account Quote Sales Stage	Probability	Sort	Create Date
Closing		8	
Contacted		2	
Demo		5	
Lost		10	
Needs Analysis		4	
Negotiation		7	
New		1	
Proposal		6	

1. Enter the **Sales Stage** name.
2. Enter the **Probability %**. This is based upon your experience that when a quote is at a certain stage, you feel comfortable forecasting x %. You must enter the information using in **.xx** (don't forget the decimal first) format. For example, you would enter .05 for 5%, .10 for 10% and 1.00 for 100%.
3. Enter the **Sort Order** to identify the sorting for each sales stage. For example, 1 would be stage one and 5 would be the fifth stage.
4. Click the Save button to save the record.

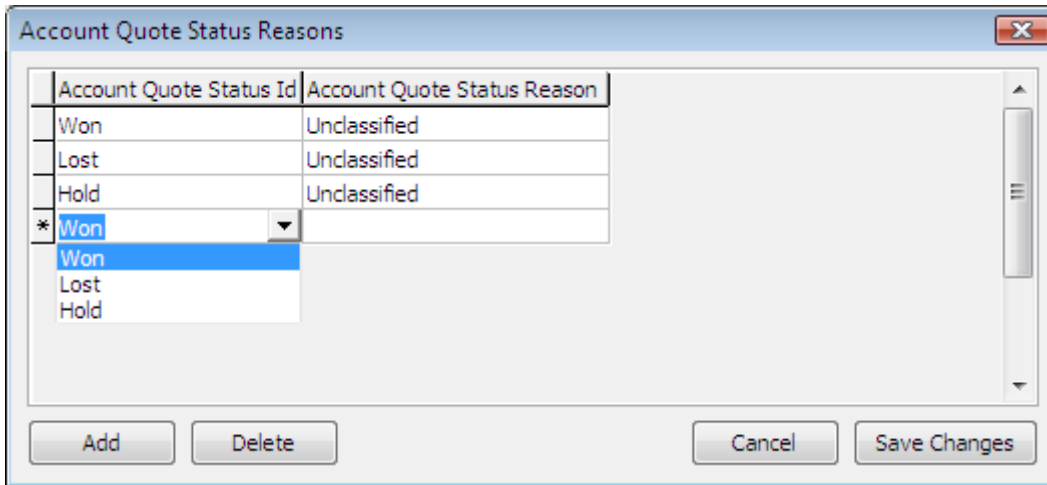
Note: You can start by editing existing sales stages if you elect not to use any of the default sales stages in ServiceLedger before adding new ones. You cannot delete sales stages once they are created.

Creating Reason Codes:

Reason Codes allow you to track why you won or lost a quote and report on why you are winning or losing business. This is an important tracking tool to allow you to track the success or failure of your quotes.

To add a Reason Code, go to the **Notes Tab** within a **Quote** where you can use the **W/L Codes** field to view and add existing reason codes in the system.

Click on the blue **W/L Codes** button to add a new reason code.

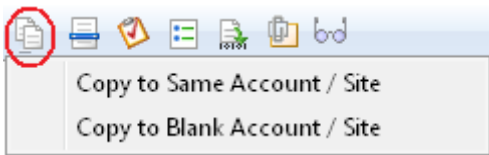


1. Select if the reason code is for quotes you **Won**, **Lost** or on **Hold**.
2. Enter a **Reason** for the reason code. For example, you create a reason code of **Won** for **Price**. You would enter **Price** would be the **Reason**.
3. Click the Save button to save the reason code.

Copying Quotes for the Same or Different Customers:

You can create a common quote record that you can re-use later for the same or different customers. This is a time-saving step that allows you to build common quotes and quickly copy the quote for the same customer or another customer.

Click on the **Copy Quote** button and select either **Copy to Same Account/Site** or **Copy to Blank Account/Site**. If you copy to a blank account, you will need to use the **Account** drop-down to select the account.



Searching For and Finding Quotes:

You can use the **Quote List** to find any existing quote in ServiceLedger. You can search for quotes by any field on the quote provided the List View Definition has been updated on the fields you wish to search by. The default List View Definition has the most common fields requested.

Enter the value you wish to search for in the **Search** field and double-click on the record to open the quote.

Name	Title	Quote #	Exp. Close	Forecast Total	Assigned To	Status	Type
Balak, Mike		106	12/23/2011	\$0.00	Administrator	Pending	New
Dunn, Eric C.W.		107	12/31/2011	\$0.00	Administrator	Pending	New
Wood's Garden Cafe		108	12/31/2011	\$0.00	Administrator	Pending	New
Tumacder, Jacint		109	12/31/2011	\$0.00	Administrator	Pending	New
Baker, Chris		110	12/31/2011	\$0.00	Administrator	Pending	New
Barley, Renee		111	12/31/2011	\$0.00	Administrator	Pending	New
Yoo, Young-Kyu		112	12/31/2011	\$0.00	Administrator	Pending	New
Burney, Tony		113	12/31/2011	\$0.00	Administrator	Pending	New
Melton, Johnny		114	12/31/2011	\$0.00	Administrator	Pending	New

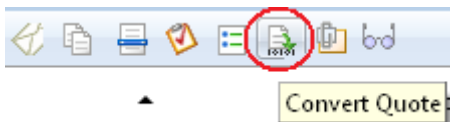
Record 1 of 5. Not showing statuses of Lost,Won.

You can also find quotes for any customer by opening the account record, clicking on the **History** tab and selecting **Quotes** as the **View Type**. This option will allow you to view the quote history for a specific account and you can double-click on any quote to open the quote record.

Converting Quotes:

When a quote is won, you can convert the quote to a work order, agreement or invoice. Converting the quote eliminates the need to duplicate effort by manually creating the work order, agreement or invoice later.

Click on the **Convert Quote** button from the quote record to convert the quote.



This will launch the **Quote Conversion** window.

Quote Conversion

Project Conversion
 If this quote is associated with a project, all work orders or invoices created below will also be associated with that project and the quote will be included in project estimation details. You can see which project this quote is associated with below. If you have not yet chosen a project, you can create a project at this time with the button below.

Project ID Create Project

Work Order / Invoice Conversion
 You can convert won quotes (or groups within a quote) to either work orders or invoices. To convert, please choose the desired option in the 'Convert To...' dropdown, then click Create Work Orders / Invoices below.

#	Group Summary	Convert To...	Converted To

Create Work Orders / Invoices

Agreement Conversion
 Agreement line items are not included in work order / invoice conversion. If any agreement line items are on the quote, they may be converted to new agreements below.

Item ID	Description	Plan	Convert To...	Converted To

Create Agreements

Select the type of conversion you wish to make. For example, if you want to create a work order, select the **Work Order** option from the **Convert to...** drop down the click the **Create Work Orders/Invoices** button (work orders will create invoices later). If you want to create an invoice, use the **Create Invoice** option (no work orders will be created). If you want to create an agreement, use the **Create Agreement** option (must have agreement items on the quote for this option to be enabled).

This will convert the quote and fill in the **Converted To** field with a link to the record that was just created.

Note: When you convert to an agreement, it will only handle the conversion and create an agreement record only. If you have any additional items on the quote, you will need to convert them to either a work order or invoice.

When converted, you can find the record it created with a hyperlink to the record on the **Details** page above the **Quoted Items**. Click on the hyperlink to open the record created from the quote.

Converted to [Work Order 1208](#)

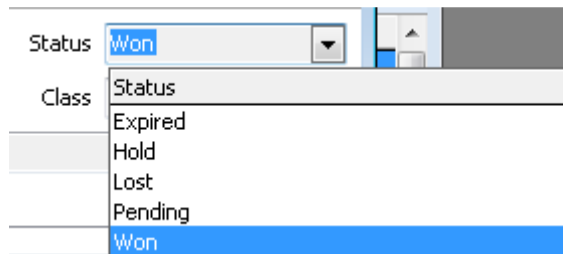
Expired & Pending Quotes:

Any quote in ServiceLedger that has not been **Won**, **Lost** or put on **Hold** will have a status of either **Pending** or **Expired**. All pending quotes will be any active quote where the **Exp Close Date** of the quote has not passed. All expired quotes will be any quote where the **Exp Close Date** of the quote has passed. To reset an **Expired** quote to **Pending**, you need to reset the **Exp Close Date** to a date that has not passed.

Losing or Holding Quotes:

When you lose business or need to put a quote on hold, you have the ability to update the reason codes to track why you lost it or put it on hold. Click on the **Status** drop-down from the quote record and select either **Lost** or **Hold**.

Note: If you select Lost, you will not be able to do anything with that quote in the future. If you select Hold, you can always change the status from Hold to Pending at a later date.



Enter the **Reason Code** on why you lost or putting the quote on hold.

Quote Reporting:

ServiceLedger provides many reports on the Quote Manager you can use for management of your quotes. Click on **Reports | Quote Reports** to view any standard report offered.