

# **ServiceLedger 2009**

## **Getting Started Guides**



### **Getting Started with the Quote Manager**

This guide will document how to use the ServiceLedger Quote Manager to track customer and prospect quotes, proposals and estimates.

## **Introduction:**

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.

## **What's New in ServiceLedger Version 2009:**

ServiceLedger 2009 added a lot of new functionality to the ServiceLedger Quote Manager. The following functionality has been added or enhanced in ServiceLedger 2009:

1. Ability to quote by service task, including ability to specify multiple quantities per task that will update estimated job duration and quoted items associated with the task.
2. Ability to sort or group quote items by using the Grouping feature with ability to print out quote by group.
3. Ability to specify Scope of Work that will copy to the work order upon Quote Conversion.
4. Improved Conversion utility allowing you to convert to Projects, multiple work orders and service agreements.

## **Benefits of Using ServiceLedger Quotes:**

If you provide any sales quoting or estimating for your customers and prospects, the ServiceLedger Quote Manager is an excellent tool to help you automate and convert your sales quotes into jobs with a click of a button. ServiceLedger provides full quoting capabilities including the ability to create sales quotes with service tasks and grouping feature to allow you to have better control over how the quote will look for the customer. Additionally, you can now print the Scope of Work on the quote that will be converted over to the job upon conversion.

## **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.

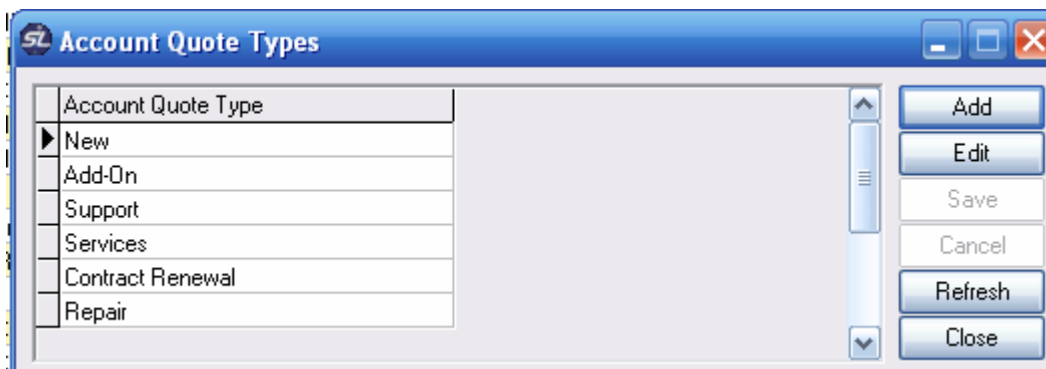
### ***Creating Quote Types:***

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, click on **Quotes | Quote Admin | Quote Types** from the **Navigator** to view existing quote types you have in the system.

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.*

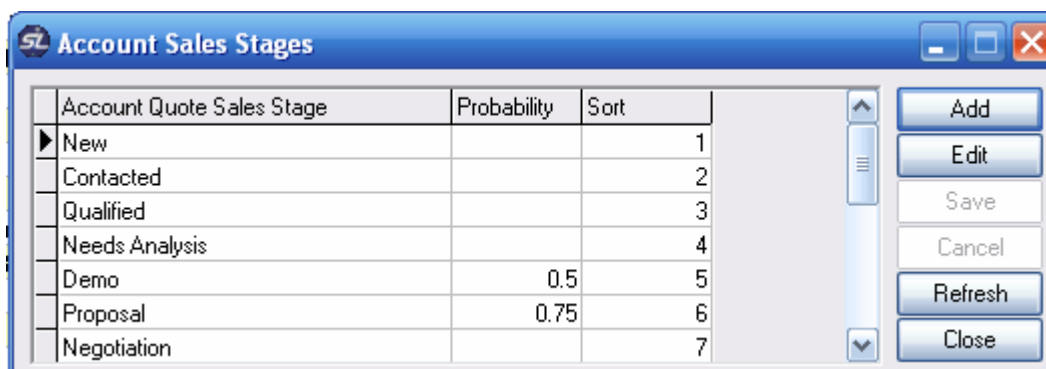


### **Creating Quote Sales Stages:**

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 **Quotes | Quote Admin | Sales Stages** from the **Navigator** to view existing sales stages in the system.

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



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.

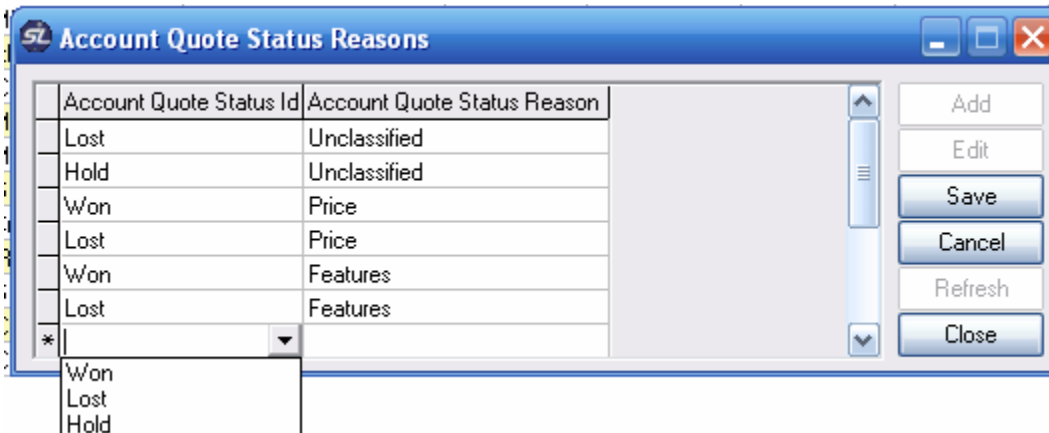
*Note: You can start by editing existing sales stages if you elect not to use any of the default sales stages in ServiceLedger before adding new ones. You cannot delete sales stages once they are created.*

### **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, click on **Quotes | Quote Admin | Reason Code** from the **Navigator** to view existing reason codes in the system.

Click on the **Add** 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.

### **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 **Quotes | Quote List** from the **Navigator** to view existing quotes and add new quotes.

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

**Quote** Class  Quote # 161 Status Pending

Details Tasks Groups Scope of Work Quote Text Notes Competitors History

Details

Account Golliday Sporting Goods Exp. Close Date 3/4/2009

Service Site Ship Quote Total \$2,120.00

Quote Title Probability 50.0%

Type New Forecast Total \$1,060.00

Sales Stage 5. Demo Rep ADMIN

Add Quote Item Remove

Drag a column header here to group by that column.

Qty	Item #	Description	Price	Ext Price	Ext Cost	Group	Task	Tax	Opt	%
5.0	Installatio	Installation of landscape design	\$35.00	\$175.00	\$0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	100
1.0	Default Pa	Default Part Item	\$45.00	\$45.00	\$0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	100
2.0	Labor	Labor	\$100.00	\$200.00	\$100.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	50.
1.0	DS-1	DS-1	\$1,500.00	\$1,500.00	\$25.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>	98.

Total: \$2,120.00 Cost: \$125.00 Forecast: \$1,060.00 Profit: \$1,995.00 / 94.10% Task Dur.: 6.00

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.

**Add Quote Item**

Details

Item ID DS-1

Description DS-1

Qty 1.0 D/M Type None % 0.0%

Price \$1,500.00 Base Price \$1,500.00

Cost \$750.00 Base Cost \$750.00

Ext. Price \$1,500.00 Ext. Cost \$750.00

Add To PO  Taxable  Optional

Agr. Plan

Class

Group

Cancel Save & New Save & Close

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**.

The screenshot shows a window titled "Add Quote Item". It contains two dropdown menus. The first is labeled "Item ID" and has "Platinum Plan" selected. The second is labeled "Agr. Plan" and also has "Platinum Plan" selected.

### **Adding Quote Tasks:**

If you use Service Tasks in ServiceLedger, you can add the service tasks to quotes for your quoting and proposal management needs. Click on the **Task** tab of the quote to add service tasks and click on the **Add Task** button to add the task.

The screenshot shows a window titled "Add Quote Task". It has a "Details" section with the following fields:
 

- Task ID:** A dropdown menu.
- Description:** A large text area.
- Quantity:** A text box containing "1" and a "Reset Quantity & Items" button.
- Dur. Ea.:** A text box containing "0.0".
- Total Duration:** A text box.
- Group:** A dropdown menu.

 Below the details is an "Items" tab with a table:
 

Qty	Description	Price	Cost	Ext. Price

1. The **Task ID** is the service task you are quoting.
2. The **Description** is the description of the task being performed.
3. **Quantity** is the quantity of the task being performed.
4. **Dur. Each** is the duration for each time the task is performed.
5. **Total Duration** is the **Quantity** times the **Dur. Each**.
6. **Group** is the group or option to attach the task to. This is optional.
7. The **Items** tab will automatically populate with all items (parts, materials, equipment and labor for the service task).

Each quote can have one or multiple service tasks added to it.

If you have **Task Groups** setup in ServiceLedger, you can add the **Task Group** instead of individual service tasks for more efficiency in creating your quotes.

For more information about service tasks, read the Getting Started with the Task Manager documentation.

### ***Adding Quote Groups/Options***

This new feature in ServiceLedger 2009 allows you to breakdown your quote into different groups or options for your customers. The main benefit of this feature is to provide your customer with a printed quote with each group or option clearly broken down in separate sections of the quote. Additionally, each group of the quote can be converted into one or multiple work orders during the quote conversion process.

Click on the **Groups** tab and click on **Add Group** to add a group or option to the quote.

The screenshot shows a software window titled "Add Quote Group Option". It contains a "Details" section with a "Summary" text box and a "Description" text area. Below this are two tabs: "Items" and "Tasks". Under the "Tasks" tab, there are three buttons: "Add Task", "Remove", and "Add Task Group". At the bottom of the window is a table with the following columns: "Task", "Description", "Qty", "Duration", "Total Cost", and "Total Price". The table is currently empty.

1. Enter a Summary of the group.
2. Enter a Description of the group.

### Group Management:

You can breakdown the **Items** or **Tasks** for each group by opening up the **Group Option** and defining the **Items** or **Tasks** associated with the group.

On **Items**, click on the **Add Item** button to add items and associate the item quoted to the group.

On **Tasks**, click on the **Add Task** button to add service tasks and associate the task quoted to the group.

*Note: If you added the items or service tasks first and need to associate them with a group afterwards, simply open up the item or task and select the appropriate group from the Group drop-down box.*

### **Adding Quote Scope of Work**

ServiceLedger 2009 allows you to add a scope of work to a quote that can be copied over to the work order upon conversion. This allows you to quickly enter in the scope of the work for the benefit of the customer and have the same scope pass over to the work order during the conversion process.

Click on the **Scope of Work** tab to enter the scope. The memo field is a free-form memo allowing you to add as much or as little as you like for the scope.

On conversion, the scope will be found in the **Request** field of the work order.

### **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.

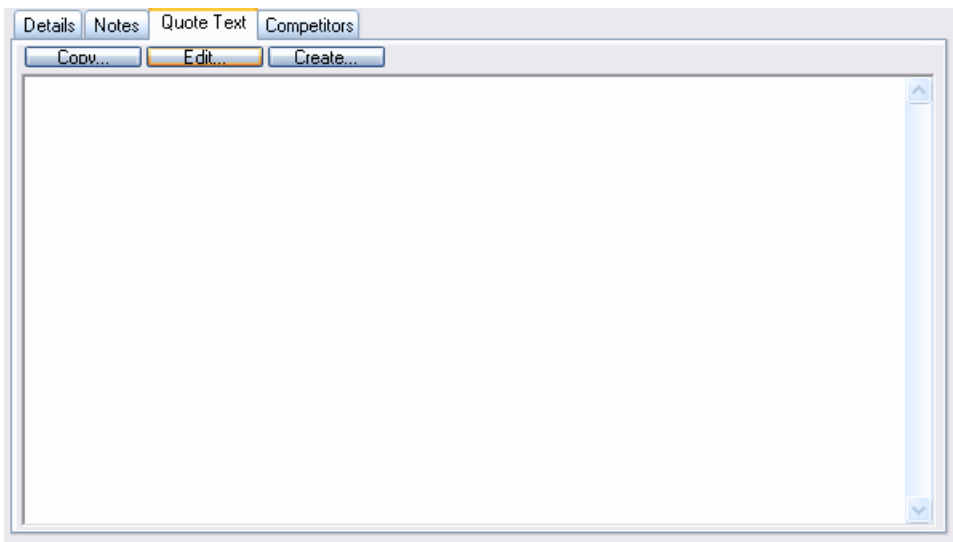
At the bottom of the Notes tab you can view information like **Reason Code** (why you won or lost the business) with a **Reason** (more detailed information) as well as the **Create By User**, **Create Date**, **Closed By User** and **Closed Date** fields.

The screenshot shows a software interface with four tabs: 'Details', 'Notes', 'Quote Text', and 'Competitors'. The 'Notes' tab is selected. At the top of the 'Notes' tab, there is a button labeled 'Add Date/Time Stamp'. Below this button is a large, empty text area for entering notes. At the bottom of the interface, there are several data fields: 'Reason Cd' (with a dropdown arrow), 'Reason' (with a text input field), 'Created By' (with the value 'ADMIN'), 'Create Date' (with the value '1/4/2007'), 'Closed By' (with a dropdown arrow), and 'Close Date' (with a dropdown arrow).

### ***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.)

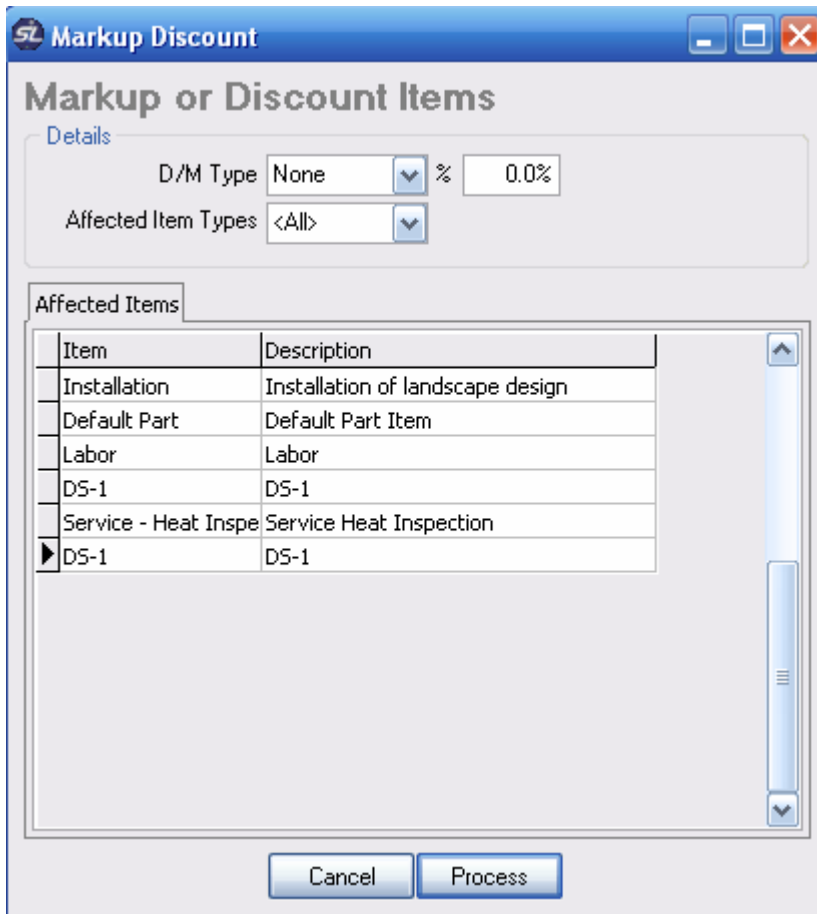


### ***Tracking Quote Competitors:***

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.

### ***Applying Global Markups or Discounts on Quotes***


From time to time you may want to apply a global markup or discount for all or certain items on the quote. Under **Actions | Global Markup / Discount** you can easily markup or discount items on the specific quote from one place instead of opening up each line item to markup or discount.




1. The **D/M Type** is the identifier if it is a markup on cost or discount on price.
2. The **%** is the amount to markup or discount.
3. **Affected Item Types** is the item types you want to markup or discount.

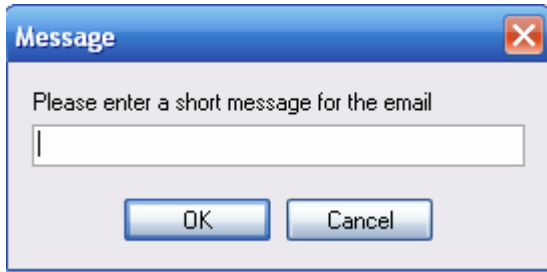
*Note: Markup is a markup of cost. If the item cost is \$10 and you want to markup by 25%, the item price will be \$12.50, or 25% above cost. Discount is the discount off of the price. If the item price is \$10 and you want to discount 25%, the new item price will be \$7.50, or 25% discount off of price.*

### **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.

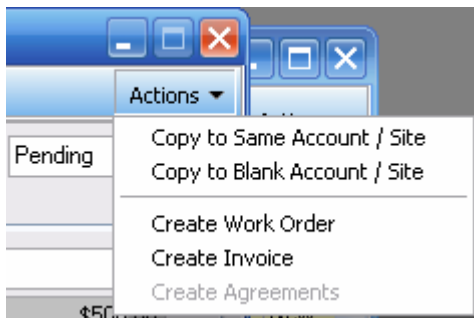
When emailing a quote, you can add a short message to the email by entering the message in the **Message** box and clicking **OK** to send.



### ***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 **Actions** 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
Blackwell, Edward		119	11/23/2007	\$0.00	Administrator	Expired
Chekris, Benjamin		143	9/19/2008	\$0.00	Administrator	Expired
Balak, Mike		146	2/20/2009	\$0.00	Administrator	Expired
Blackwell, Edward		150	2/21/2009	\$0.00	Administrator	Expired
Balak, Mike		152	2/21/2009	\$0.00	Administrator	Expired
Golliday Sporting Goods		161	3/4/2009	\$1,810.00	Administrator	Pending

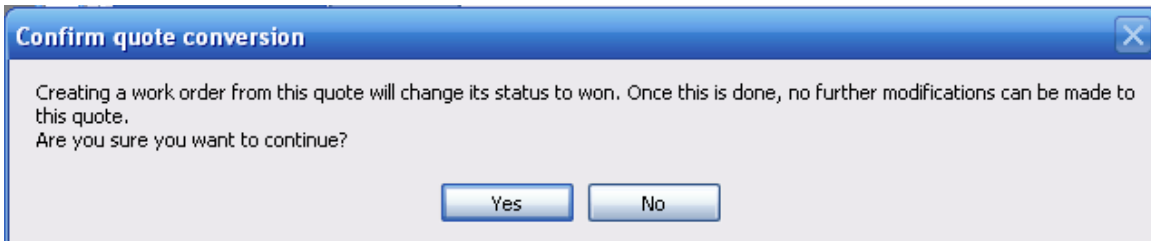
You can also find quotes for any customer by opening the account record, clicking on the **History** tab and selecting **Quotes** as the **View Type**. This option will allow you to view the quote history for a specific account and you can double-click on any quote to open the quote record.

### Converting Quotes:

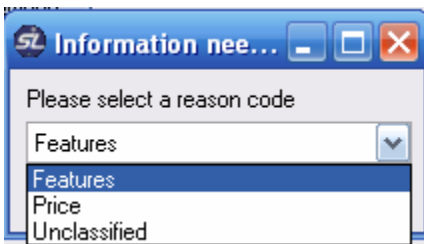
When a quote is won, you can convert the quote to a work order, agreement or invoice. Converting the quote eliminates the need to duplicate effort by manually creating the work order, agreement or invoice later.

Click on the **Actions** button from the quote record and click on **Convert / Review Links** to convert the quote.

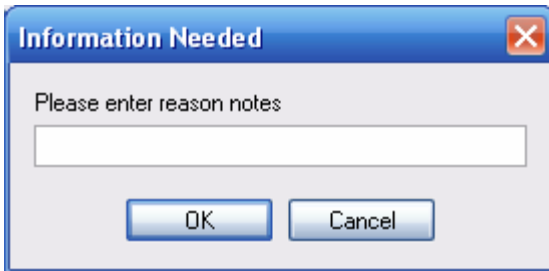
You will get a confirmation message asking if you are sure you want to convert the quote. Click **Yes** if you want to proceed.



Select the **Reason Code** on why you won the business and click **OK** to proceed.



Enter additional reasons on why you won the business and click **OK** to proceed.



1. You have several options when converting a quote. First, and most important, you must decide if you are going to create a **Project** first before you convert the quote. This step is important because if you convert before creating the project, you are unable to go back through the quote to re-associate the quote with the project later.
2. If you are going to create a project first, click on the **Create Project** button to create the Project. Note: It is important that you read the Getting Started with Projects documentation to understand the proper way to create projects, especially pertaining to invoicing, before you start using Project Management or converting quotes to projects. Note: You can

*bypass projects altogether and just convert directly to work orders. This is purely an optional feature in ServiceLedger 2009.*

3. If you have multiple groups on the quote, you can convert each one individually or all of them at the same time.
4. Select the **Convert To** option for each group. **New Work Order** will convert to a work order and **New Invoice** will bypass work orders and just create an invoice.
5. Click on **Process Conversion** to convert the quote.
6. If the quote has agreement items, you can create the agreement record by clicking on the **Process Agreements** button after you have converted all other options on the quote.

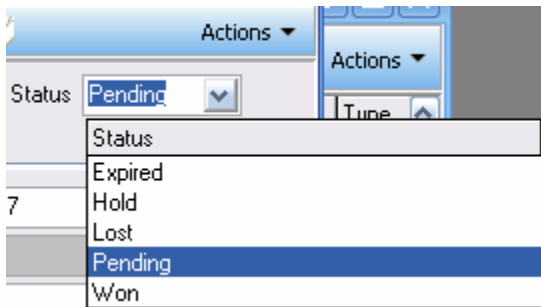
### Expired & Pending Quotes:

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**.

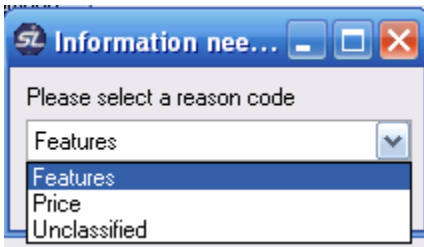
*Note: If you select Lost, you will not be able to do anything with that quote in the future. If you select Hold, you can always change the status from Hold to Pending at a later date.*



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.



Enter any additional information you want to track on why you lost or putting the quote on hold.

