

Table of Contents

- Introduction 1
- Lead Entry 2
- Quote Entry..... 8
- Sending a Quote..... 13
- Quotes – Other tabs..... 17
- Steps After Winning Quote..... 22
 - #1. Award the Line Items on the Quote that your new customer agreed to**..... 22
 - #2. Convert to Customer** 22
 - #3. Add Customer to QB, from the Quote** 23
 - #4. Assign to a Route, by Clicking the Assign to a Route Button** 23
 - #5. Add Items to Pricing, which will add the awarded line items to the Pricing Tab** 24
 - #6. (optional) Notify Driver / Create Follow up Task** 25
 - #8. Update Preferred Delivery Method in QuickBooks** 28
- Quote List..... 29

Introduction

RouteStar Online (RSO) has a built in Leads & Quotes system which replaces ZoHo. Benefits of using the RSO Leads & Quotes platform is:

1. License fees are not required to be paid for ZoHo licenses
2. Leads can be converted to quotes, thus eliminating double entry (Converted leads will also sync into QuickBooks)
3. Quotes can be generated from the system to present to a potential customer or existing customer

The definition of “Leads and Quotes” is:

1. “Leads” are essentially businesses that you are prospecting, which are not current customers
2. “Quotes” are the products and services you quote for a lead or an existing customer

Leads and Quotes are accessed from the Menu structure in RSO, “Leads and Quotes.” Sub menu Items include:

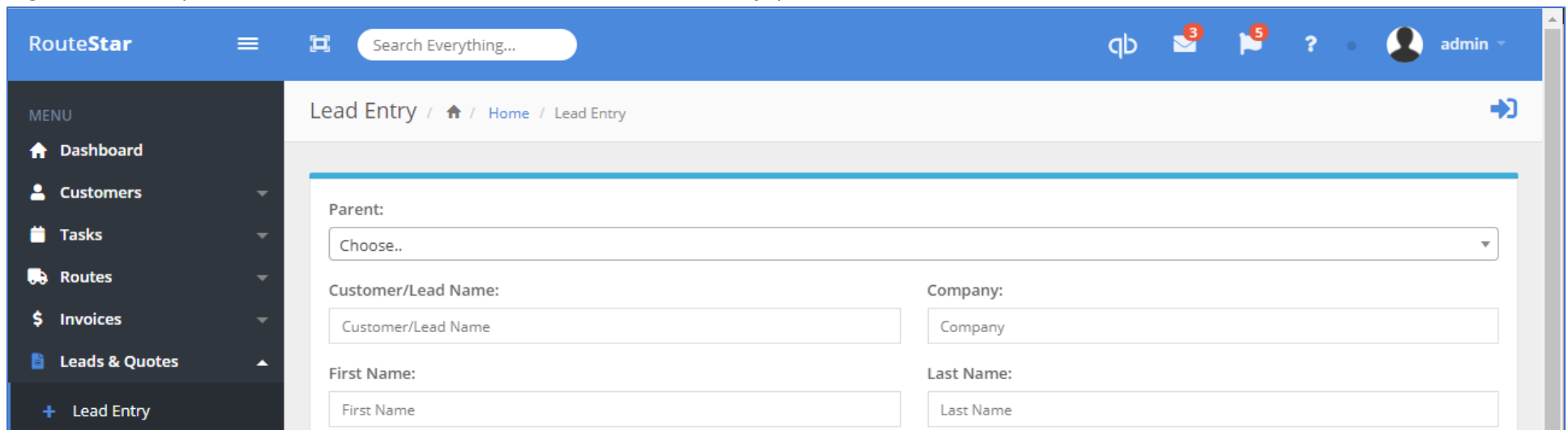
- Lead Entry – entry screen for the beginning of the Lead process (identical to setting up a new account)
- Leads List – an exportable grid or list that displays the details of the quotes (much like the customer list)
- Quote Entry – entry screen for the beginning of the Quote process (like adding items to a customer)
- Quote List – an exportable grid or list that displays the details of the quotes and a status dashboard
- Buy Leads – a future program to purchase leads and have them loaded directly into RSO

Basic Elements of Leads & Quotes is:

1. Create a lead or use an existing customer
2. Create a Quote for that lead or customer
3. Convert the lead to a customer (if you started with a lead)
4. Award the Quote Items, Route the customer, create an install ticket and put them on the route schedule



Lead Entry

Login to RSO with your user credentials and select **Leads & Quotes, Lead Entry**, you will see this screen:



The screenshot shows the RouteStar web application interface. The top navigation bar is blue and contains the 'RouteStar' logo, a search bar with the text 'Search Everything...', and user information including 'qb', notification counts (3 and 5), a help icon, and a user profile for 'admin'. A dark sidebar menu on the left lists 'MENU' items: Dashboard, Customers, Tasks, Routes, Invoices, Leads & Quotes, and Lead Entry. The main content area is titled 'Lead Entry / Home / Lead Entry' and contains a form with the following fields: 'Parent' (a dropdown menu with 'Choose..' selected), 'Customer/Lead Name' (a text input field), 'Company' (a text input field), 'First Name' (a text input field), and 'Last Name' (a text input field).

Enter the Lead name and Lead contact Info:

Lead Entry /  / Home / Lead Entry 






Parent:


Customer/Lead Name: Company:

First Name: Last Name:

Next, start typing the lead address in the **Search for Service Address**. With Locations services allowed on your browser, the address should start to auto-fill:

Search for Service Address:

-  **100 Main Street** Fort Mill, SC, USA
-  **100 Main Street** McAdenville, NC, USA
-  **100 Main Street** Pineville, NC, USA
-  **100 North Main Street** Belmont, NC, USA
-  **100 West Main Avenue** Gastonia, NC, USA

powered by 

Most locations will have the same **Bill to Address**, so just select the checkbox:

Billing Address:

Same as Service Address

Your completed address(es) will be filled in with the correct QuickBooks formatting that is required for a good Geo-Coding:

🔍 Search New Address

Billing Address:

Same as Service Address

RSO – LEADS & QUOTES

Complete the Phone and Email fields and your sales rep initials (the other fields are discretionary and may be completed once the lead converts to a customer)

Phone: <input type="text" value="513-652-3710"/>	Alt Phone: <input type="text" value="704-901-8317"/>	Fax: <input type="text" value="Fax"/>	
Email: <input type="text" value="mhanschke@gmail.com"/>	Is this a customer or a lead? <input type="text" value="Lead"/>	Preferred Contact Method: <input type="text" value="SMS"/>	
Sales Rep: <input type="text" value="TN"/>	Tax Code: <input type="text" value="Choose.."/>	Sales Tax Rate: <input type="text" value="Choose.."/>	Customer Type <input type="text" value="Choose.."/>
Terms <input type="text" value="Choose.."/>	Grouping <input type="text" value="Choose.."/>	Price Grouping <input type="text" value="Choose.."/>	

We now have all the information required to create the lead (or Clear to start over). Press **Create Customer/Lead**.

<input type="button" value="Clear/Reset Form"/>	<input type="button" value="+ Create Customer/Lead"/>
---	---

The screen will refresh, and you will be presented with your New Lead (Note the **Convert to Customer** button):

Customer Detail / Home / Customers / Customer Detail

Enviro Testing School - Location A

Created: 10/19/2020 8:33 AM Last Modified: 10/19/2020 8:33 AM

[+ Convert to Customer](#)
[+ Task](#)
[+ Invoice](#)
[+ Quote](#)
[Geocode](#)
[Delete](#)
[Close](#)

[Details](#)
[Activity](#)
[Additional Info](#)
[Additional Contacts](#)
[Equipment](#)
[Routes](#)
[Notes](#)
[Attachments](#)
[Pricing](#)
[Portal](#)
[Transactions](#)
[Marketing](#)

Account # Account Number	Parent Parent Name	Customer/Job Enviro Testing School - Location A
Balance \$	Company Enviro Testing School	Contact Michael Enviro

This lead will be visible in the **Lead List** (the lead list can be exported to Excel and the grid can also be sorted and filtered like all normal RSO grids):

Leads / Home / Leads

[Menu](#)

Last

	Lead	Address	City	State	Zip	Phone	Email	Active	Paperless	
1	Enviro Testing School - Location A	100 Main St	Fort Mill	SC	29715	513-652-3710	mhanschke@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10.
2	MH 12	Woodvine Court	Indian Trail	NC	28079	5136523710	mhanschke@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	06.

RSO – LEADS & QUOTES

Quote Entry

Next step is to create a quote for that lead (or an existing customer). If you are still on the lead record, you may select **+ Quote** from the top menu screen, or, alternatively, you may select **Leads & Quotes, Quote Entry**

Customer Detail / Home / Customers / Customer Detail

Enviro Testing School - Location A

Created: 10/19/2020 8:33 AM Last Modified: 10/19/2020 8:33 AM

[+ Convert to Customer](#)
[+ Task](#)
[+ Invoice](#)
[+ Quote](#)
[Geocode](#)
[Delete](#)
[Close](#)

[Details](#)
[Activity](#)
[Additional Info](#)
[Additional Contacts](#)
[Equipment](#)
[Routes](#)
[Notes](#)
[Attachments](#)
[Pricing](#)
[Portal](#)
[Transactions](#)
[Marketing](#)

Account #
 Account Number

Balance
 \$

Tax Code
 Choose..

Parent
 Parent Name

Company
 Enviro Testing School

Email
 mhanschke@gmail.com

Customer/Job
 Enviro Testing School - Location A

Contact
 Michael Enviro

Phone
 513-652-3710

Either method will open the Quote screen:

Quote Details / Home / Quote List / Quote Details / Q1023

[Quote Details](#)
[Attachments](#)
[Equipment](#)
[Tasks](#)
[Steps After Winning Quote](#)
[Forms](#)

[+ Create](#)
[Save & Close](#)
[Print](#)
[Email](#)
[Duplicate](#)
[Delete Quote](#)

Customer/Lead Info
 Customer/Lead: Enviro Testing School - Location A

Quote Details
 Date Entered: 10/19/2020

Misc Info
 Entered By: admin

RSO – LEADS & QUOTES

Enter the estimated **Value of Account** on the **Customer/Lead Info** tab:

Customer/Lead Info		Billing Address	Service Address
Customer/Lead			
<input type="text" value="Enviro Testing School - Location A"/>			
Phone	Email		
<input type="text" value="513-652-3710"/>	<input type="text" value="mhanschke@gmail.com"/>		
Contact	Value of Account		
<input type="text"/>	<input type="text" value="4800"/>		

Complete the **Stage** and **Status Fields** on the **Quote Details** tab:

Quote Details	Misc Info
Date Entered	Entered By
<input type="text" value="10/19/2020"/>	<input type="text" value="admin"/>
Quote #	Sales Rep
<input type="text" value="Q1023"/>	<input type="text" value="TN"/>
Case Type	Stage
<input type="text" value="Choose.."/>	<input type="text" value="Prepare Quote"/>
Last Touched	Status
<input type="text" value="10/19/2020 8:41 AM"/>	<input type="text" value="Pending"/>

RSO – LEADS & QUOTES

Enter a **Quote Good Through** and **Follow Up Date** on the **Misc Info** tab:

Quote Details
Misc Info

PO #

Terms

Quote Good Through

Deposit Amount

Follow Up Date

Quote Type

Next it is time to add **Line Items** to the quote. For a new customer, you would most likely add all services and products. For an existing customer, you may likely add an additional service or products. Either way, it is the same for a new or existing customer. Use the **Choose** field and select the + sign to add to the quote:

Line Items

+

	Item	Description	Qty	Rate	Amount	Class	Tax Code	Awarded
1	Choose..							<input type="checkbox"/>

TIP: Use natural language when searching for an item. Entering scrub, will display all items that reference the word scrub.

Completed **Line Items** on the quote:

Line Items

+

	Item ↑	Description	Qty	Rate	Amount	Class	Tax Code	Awarded
1	A1-PAPER:8 in Hardwound Kraft	8 inch Hardwound Kraft	1	\$6.50	\$6.50		Tax	<input type="checkbox"/>
2	D1-DISPENSERS:AIR-ODY-BLK - Odyssey	ODYSSEY Battery Dispenser - BLK - Private labeled	4	\$0.00	\$0.00		Tax	<input type="checkbox"/>
3	Services:6006-Trip Charges	Trip Charge	1	\$4.00	\$4.00		Non	<input type="checkbox"/>
4	Services:7001-Sani Service Weekly	Sani Service - Weekly	1	\$38.00	\$38.00		Non	<input type="checkbox"/>
5	Services:8001-Sani Scrub E4W	Sani Scrub - Every four weeks	1	\$138.00	\$138.00		Non	<input type="checkbox"/>
6	Choose..							<input type="checkbox"/>

RSO – LEADS & QUOTES

You may want to add a **Quote Description** at the bottom of the quote and review the totals:

Signed By

Quote Description [Web Comments](#)

Reminder, this quote is good for 30 days. We look forward to earning your business!

Tax Breakdown

Code	Amount
(0%)	\$0.00

Subtotal	\$186.50
Tax	\$0.00
Total	\$186.50
Awarded Total	\$0.00

NOTE: We did not select a tax rate in the field when we created this quote, so no taxes are being displayed. So it may be a good idea to determine the Tax code, so that a more accurate quote may be prepared.

Quotes are visible on the **Quote List Grid**:

Menu
Refresh

List

Map

Quote #	Date ↓	Entered By	Customer	Case	Stage	Status	Follow Up	Awarded	Rejected	Quoted Total	Awarded Total	Percent Awarded	
1	Q1023	10/19/2020	admin	Enviro Testing School - Location A		Prepare Quote	Pending	11/02/2020			\$186.50	\$0.00	0%
2	Q1021	10/12/2020	admin	TEST						\$0.00	\$0.00	0%	
3	Q1018	10/01/2020	admin	Ace Hardware - Hanschkeville		Initial Visit	Won			\$56.96	\$56.50	99%	
4	Q1019	10/01/2020	admin	mm1						\$181.50	\$181.50	100%	
5	Q1020	10/01/2020	admin	mm2		Initial Visit	Pending			\$1,135.00	\$1,135.00	100%	
6	Q1017	09/01/2020	admin	MH-LEAD-01		Present Quote	Won			\$376.50	\$376.50	100%	
7	Q1015	07/07/2020	admin	MH-5						\$0.00	\$0.00	0%	

With a Total Quoted vs Awarded and percentage:

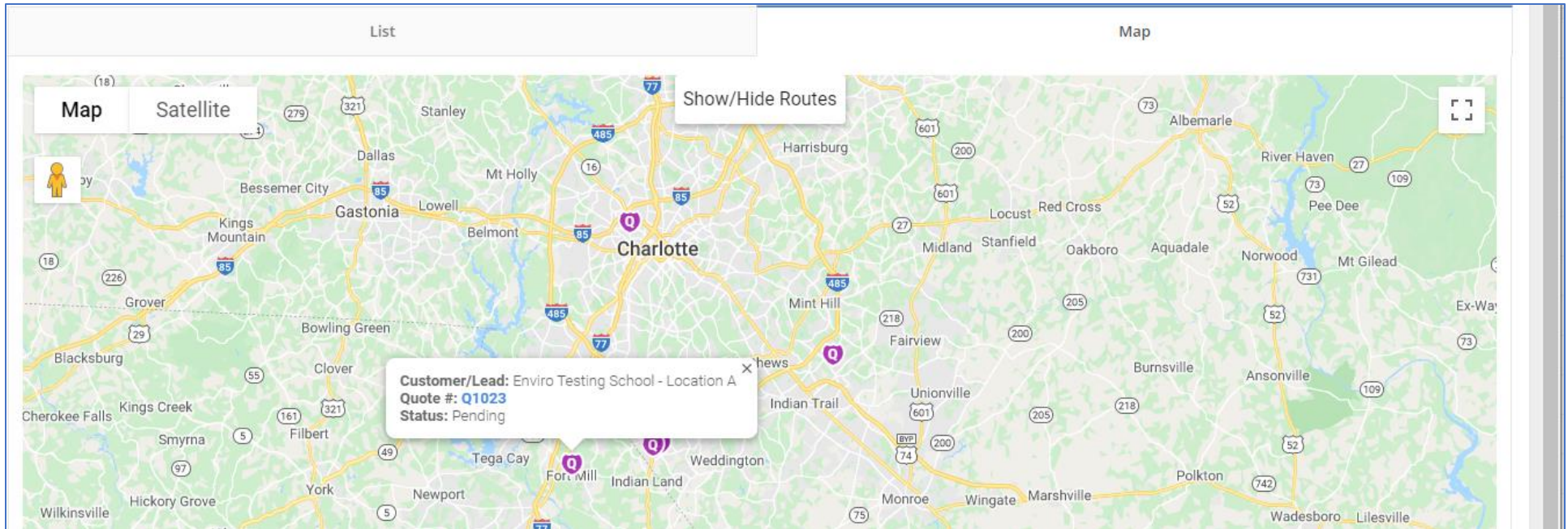
First

Quoted Total: \$3882.51 Total Awarded: **\$3225.50**

Percent Awarded: **83.08%**

RSO – LEADS & QUOTES

and in Map format:



Or also visible on the **Transactions** tab, on the lead itself:

Customer Detail / [Home](#) / [Customers](#) / Customer Detail ➔

Enviro Testing School - Location A

Created: 10/19/2020 8:33 AM Last Modified: 10/19/2020 9:19 AM

[+ Convert to Customer](#)
[+ Task](#)
[+ Invoice](#)
[+ Quote](#)
[Geocode](#)
[Delete](#)
[Close](#)

[Details](#)
[Activity](#)
[Additional Info](#)
[Additional Contacts](#)
[Equipment](#)
[Routes](#)
[Notes](#)
[Attachments](#)
[Pricing](#)
[Portal](#)
[Transactions](#)
[Marketing](#)

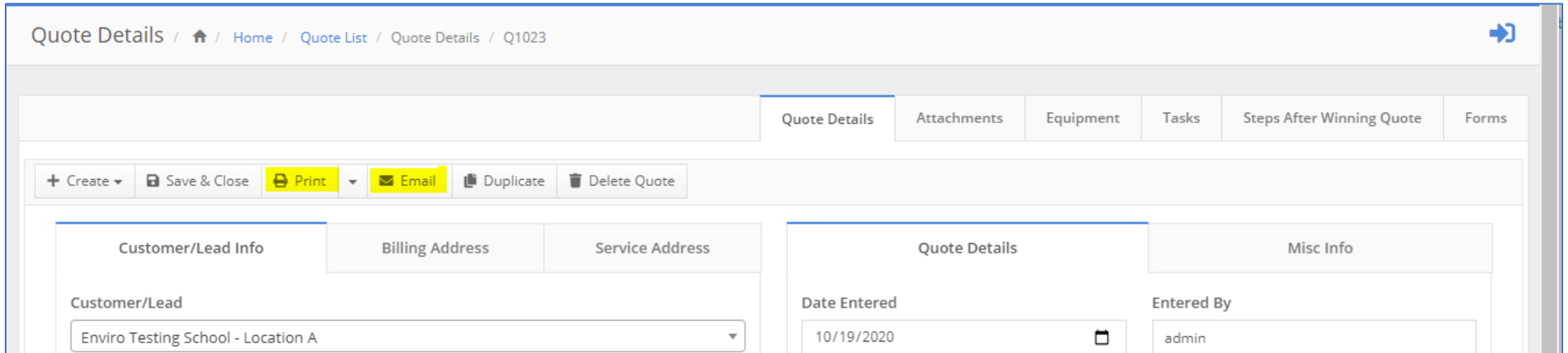
Menu
🔍
🔄
Search List

Last

	Txn #	Type	Date	Status	AssignedTo	Total
1	Q1023	Quote	10/19/2020	Pending	admin	\$186.5

Sending a Quote

At this point, you may elect to **Print** or **Email** the quote:



Quote Details / Home / Quote List / Quote Details / Q1023

Quote Details | Attachments | Equipment | Tasks | Steps After Winning Quote | Forms

+ Create | Save & Close | Print | Email | Duplicate | Delete Quote

Customer/Lead Info	Billing Address	Service Address	Quote Details	Misc Info
Customer/Lead Enviro Testing School - Location A			Date Entered 10/19/2020	Entered By admin

Email a Quote:

Email Quote

From

To

Please enter only one valid address.

CC

Please enter only one valid address.

Body

Dear Enviro Testing School - Location A, you can view your quote by downloading the attached PDF.


Information about the invoice and a link will be added automatically to the emailed message.

Send Me a Copy

This will automatically BCC the email address connected to your username.

SEND **CANCEL**


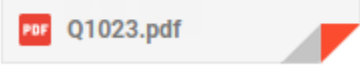
Quote in customer Inbox:



Quote Q1023 Enviro-Master  Inbox x

Enviro-Master <no-reply@mycustomerconnect.com>
to me ▾

Dear Enviro Testing School - Location A, you can view your quote by downloading the attached PDF.

Quote #: Q1023 **Date:** 10/19/2020
Total: \$186.50 **Terms:**

 Reply  Forward

Print a Quote:



Enviro-Master
 PO Box 12350
 Charlotte, NC 28220
 Phone: 7049018317
 Email: mhanschke@enviro-master.com

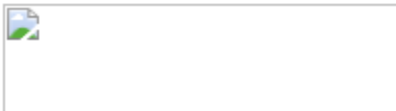
Quote #	Q1023
Date	10/19/2020

Bill To:	Ship To:
Enviro Testing School - Location A 100 Main St Fort Mill, SC 29715	Enviro Testing School - Location A 100 Main St Fort Mill, SC 29715

Terms	PO #

Description	Quantity	Rate	Price
8 inch Hardwound Kraft	1.00	\$6.50	\$6.50
Trip Charge	1.00	\$4.00	\$4.00
Sani Service - Weekly	1.00	\$38.00	\$38.00
Sani Scrub - Every four weeks	1.00	\$138.00	\$138.00
ODYSSEY Battery Dispenser - BLK - Private labeled	4.00	\$0.00	\$0.00

Notes:



Subtotal	\$186.50
(0%)	\$0.00
Total	\$186.50

Signed By:

RSO – LEADS & QUOTES

Quotes – Other tabs

Attachments – add any other documents or images to the Lead for future reference

Quote Details / Home / Quote List / Quote Details / Q1023

Quote Details | Attachments | Equipment | Tasks | Steps After Winning Quote | Forms

Drag & Drop Files (or click to upload)

Menu | Refresh / Clear Filters | Search List

Last

	FileName	Notes	Group	AddedBy	DateAdded	Actions
1	Q1023-20201019100601.jpg		Choose..	admin	10/19/2020 10:06 AM	Download Remove

Equipment – this would typically be added after the customer was won.

Tasks – Use the **Create Task** menu (we will be building a RSO – Tasks document, which will go deeper into detail, this covers the basics):

Quote Details / Home / Quote List / Quote Details / Q1023

Quote Details | Attachments | Equipment | **Tasks** | Steps After Winning Quote | Forms

+ Create | Save & Close | Print | Email | Duplicate | Delete Quote

Task

Invoice

Customer/Lead

Billing Address

Service Address

Quote Details

Misc Info

Date Entered

Entered By

Enter the pertinent Information on the Task (Task Types are maintained on the Create New Task function):

+ Create Task ✕

Start 10/26/2020 📅 **End** 10/30/2020 📅

Assigned To
✕ admin

Task Type
Follow Up On Quote ▼

Add only awarded line items?
No (Add All Items) ▼

Create Cancel

Quote Details / [Home](#) / [Quote List](#) / Quote Details / Q1023 ➔

[Quote Details](#) [Attachments](#) [Equipment](#) **Tasks** [Steps After Winning Quote](#) [Forms](#)

TW5279

[Prepare Quote](#)

Start: 10/26/2020 12:00 AM

End: 10/30/2020 10:14 AM

Description: Created From Quote #: Q1023

Resolution: - n/a -

🔔 Task created by [admin](#)

Assign the task to somebody for follow up and Save & Close !

TW5279 ✕

Task Details

Enviro Testing School - Location A

20

10/26/2020 12:00 AM 📅 10/30/2020 10:14 AM 📅

Line Items

100 Main St

Equipment

Fort Mill SC 29715

mhanschke@gmail.com 513-652-3710 Michael Enviro

Recurring

Preferred Contact Method: SMS Email Phone

Forms

Description Notes Resolution Customer Comments

Attachments

Activity

Bills

admin ✕
Type here to add users

B **I** **U** **🔗** **🔗** **X²** **X₂** 13 **A** **☰** **☰** **☰** **🔗** **📄** **🖨** **Print** **🕒**

Call Michael at Enviro Testing School and see if he has any questions on the Quote we sent last week.

A possible demo or paid for service may help move this account to the won column !

Text Notification:

Today

A task was created for you by admin. <http://rsnotify.com/1j9k>
10:18 AM

Email Notification:

From: Enviro-Master BETA <no-reply@mycustomerconnect.com>
Sent: Monday, October 19, 2020 10:18 AM
To: Michael Hanschke <mhanschke@enviro-master.com>
Subject: [Automated Notification] Task Updated for Enviro Testing School - Location A

Dear admin,

There has been an update to a task your assigned to. You can click the link below to view its details.

[Click Here](#)

Looking for a quick summary of this task?

Check out the tracker by clicking [here](#).

Links not working? Copy and paste the following address into your browser:

Details: <http://embeta.routestar.online/web/employeeetasklist/TW5279>

Tracker: <https://embeta.routestar.online/web/tasktracker/PlwJu7ulfbgacW0wwtSfaQXX>

Steps After Winning Quote

#1. Award the Line Items on the Quote that your new customer agreed to

	Item	Description	Qty	Rate	Amount	Class	Tax Code	Awarded
1	A1-PAPER:8 in Hardwound Kraft	8 inch Hardwound Kraft	1	\$6.50	\$6.50		Tax	<input type="checkbox"/>
2	Services:6006-Trip Charges	Trip Charge	1	\$4.00	\$4.00		Non	<input checked="" type="checkbox"/>
3	Services:7001-Sani Service Weekly	Sani Service - Weekly	1	\$38.00	\$38.00		Non	<input checked="" type="checkbox"/>
4	Services:8001-Sani Scrub E4W	Sani Scrub - Every four weeks	1	\$138.00	\$138.00		Non	<input type="checkbox"/>
5	D1-DISPENSERS:AIR-ODY-BLK - Odyssey	ODYSSEY Battery Dispenser - BLK - Private labeled	4	\$0.00	\$0.00		Tax	<input checked="" type="checkbox"/>
6	Choose..							<input type="checkbox"/>

#2. Convert to Customer

Customer Detail / [Home](#) / [Customers](#) / Customer Detail ➔

Enviro Testing School - Location A

Created: [10/19/2020 8:33 AM](#) Last Modified: [10/19/2020 9:19 AM](#)

+ Convert to Customer
+ Task
+ Invoice
+ Quote
Geocode
Delete
Close

#3. Add Customer to QB, from the Quote

Quote Details / Home / Quote List / Quote Details / Q1023

	Quote Details	Attachments	Equipment	Tasks	Steps After Winning Quote	Forms
Add Customer to QB	<input checked="" type="checkbox"/>	Completed			10/19/2020 10:58 AM	
Assign to a Route	<input type="checkbox"/>	Completed			Completed TimeStamp	
Add Items to Pricing	<input type="checkbox"/>	Completed			Completed TimeStamp	
Notify Driver	<input type="checkbox"/>	Completed			Completed TimeStamp	
Create Follow Up Task	<input type="checkbox"/>	Completed			Completed TimeStamp	

#4. Assign to a Route, by Clicking the Assign to a Route Button

Quote Details / Home / Quote List / Quote Details / Q1023

	Quote Details	Attachments	Equipment	Tasks	Steps After Winning Quote	Forms
Add Customer to QB	<input checked="" type="checkbox"/>	Completed			10/19/2020 10:58 AM	
Assign to a Route	<input checked="" type="checkbox"/>	Completed			10/19/2020 11:01 AM	

RSO – LEADS & QUOTES

Enter the name, **Get Distance** and then use the **arrows** to insert before or after another stop:

Map Distance / Home / Map Distance

Data View | Map View

Map Distance to a New Route Stop

Select a customer and press get distance and then simply click the arrow to add the selected customer to the route schedule either before or after.

Enviro Testing School - Location A Get Distance

AssignedTo	Freq	Date	Customer	Day	Stop	Distance (mi.)	Before/After
CORP5	weekly	10/12/2020	mm2	Monday	2	5.598349	↩ ↪
CORP5	weekly	10/14/2020	MICHAEL COD	Wednesday	1	6.046129	↩ ↪
CORP5	weekly	10/15/2020	MH-17	Thursday	1	6.046129	↩ ↪

#5. Add Items to Pricing, which will add the awarded line items to the Pricing Tab

Quote Details / Home / Quote List / Quote Details / Q1023

Quote Details | Attachments | Equipment | Tasks | **Steps After Winning Quote** | Forms

Add Customer to QB	<input checked="" type="checkbox"/> Completed	10/19/2020 10:58 AM
Assign to a Route	<input checked="" type="checkbox"/> Completed	10/19/2020 11:01 AM
Add Items to Pricing	<input checked="" type="checkbox"/> Completed	10/19/2020 11:06 AM

Awarded Items will be added to the pricing:

Customer Detail / [Home](#) / [Customers](#) / Customer Detail ➔

Enviro Testing School - Location A

Created: 10/19/2020 8:33 AM Last Modified: 10/19/2020 9:19 AM

+ Task + Invoice + Quote Geocode Delete Close

Details
Activity
Additional Info
Additional Contacts
Equipment
Routes
Notes
Attachments
Pricing
Portal
Transactions
Marketing

Menu ↕ 🔍 ↕ 🔄

Search List

🔴 Last

	Item	Description	Cost	Sales Price	Default Qty	Fill Cap	Frequency	Class
1	Services:6006-Trip Charges	Trip Charge	\$0.000	\$4.000			Choose..	Choose..
2	Services:7001-Sani Service Weekly	Sani Service - Weekly	\$0.000	\$38.000			Choose..	Choose..
3	D1-DISPENSERS:AIR-ODY-BLK - Odyssey	ODYSSEY Battery Dispenser - BLK - Private labeled	\$0.000	\$0.000			Choose..	Choose..
4	Choose..						Choose..	Choose..

#6. (optional) Notify Driver / Create Follow up Task

Quote Details / [Home](#) / [Quote List](#) / Quote Details / Q1023 ➔

Quote Details
Attachments
Equipment
Tasks
Steps After Winning Quote
Forms

<div style="border: 1px solid #ccc; padding: 5px; width: 80%; margin: 0 auto;">Add Customer to QB</div>	<input checked="" type="checkbox"/> Completed	<div style="border: 1px solid #ccc; padding: 5px; width: 80%; margin: 0 auto;">10/19/2020 10:58 AM</div>
<div style="border: 1px solid #ccc; padding: 5px; width: 80%; margin: 0 auto;">Assign to a Route</div>	<input checked="" type="checkbox"/> Completed	<div style="border: 1px solid #ccc; padding: 5px; width: 80%; margin: 0 auto;">10/19/2020 11:01 AM</div>
<div style="border: 1px solid #ccc; padding: 5px; width: 80%; margin: 0 auto;">Add Items to Pricing</div>	<input checked="" type="checkbox"/> Completed	<div style="border: 1px solid #ccc; padding: 5px; width: 80%; margin: 0 auto;">10/19/2020 11:06 AM</div>
<div style="border: 1px solid #ccc; padding: 5px; width: 80%; margin: 0 auto; background-color: #fff9c4;">Notify Driver</div>	<input checked="" type="checkbox"/> Completed	<div style="border: 1px solid #ccc; padding: 5px; width: 80%; margin: 0 auto;">10/19/2020 11:10 AM</div>

Notifies the driver with an email or SMS text that they have a new customer on their route:

+ Create Task ✕

Start 10/19/2020 📅 **End** 10/19/2020 📅

Assigned To
✕ CORP1

Task Type
New Customer Assigned to You ▾

Add only awarded line items?
Yes (Add Awarded Only) ▾

Create Cancel

#7. Update your Quote, so that is correctly reflected on your dashboard

Quote Details / Home / Quote List / Quote Details / Q1023

Quote Details | Attachments | Equipment | Tasks | Steps After Winning Quote | Forms

+ Create | Save & Close | Print | Email | Duplicate | Delete Quote

Customer/Lead Info		Billing Address	Service Address	Quote Details		Misc Info
Customer/Lead Enviro Testing School - Location A			Date Entered 10/19/2020		Entered By admin	
Phone 513-652-3710	Email mhanschke@gmail.com		Quote # Q1023		Sales Rep TN	
Contact []	Value of Account 4800		Case Type Choose..		Stage Closed	
			Last Touched 10/19/2020 11:21 AM		Status Won	

	Quote #	Date	Entered By	Customer	Ca	Stage	Status	Follow Up	Av	Re	Quoted Total	Awarded Total	Percent Awarded
1	Q1023	10/19/2020	admin	Enviro Testing School - Location A		Closed	Won	11/02/2020			\$186.50	\$42.00	22%
2	Q1021	10/12/2020	admin	TEST							\$0.00	\$0.00	0%

#8. Update Preferred Delivery Method in QuickBooks

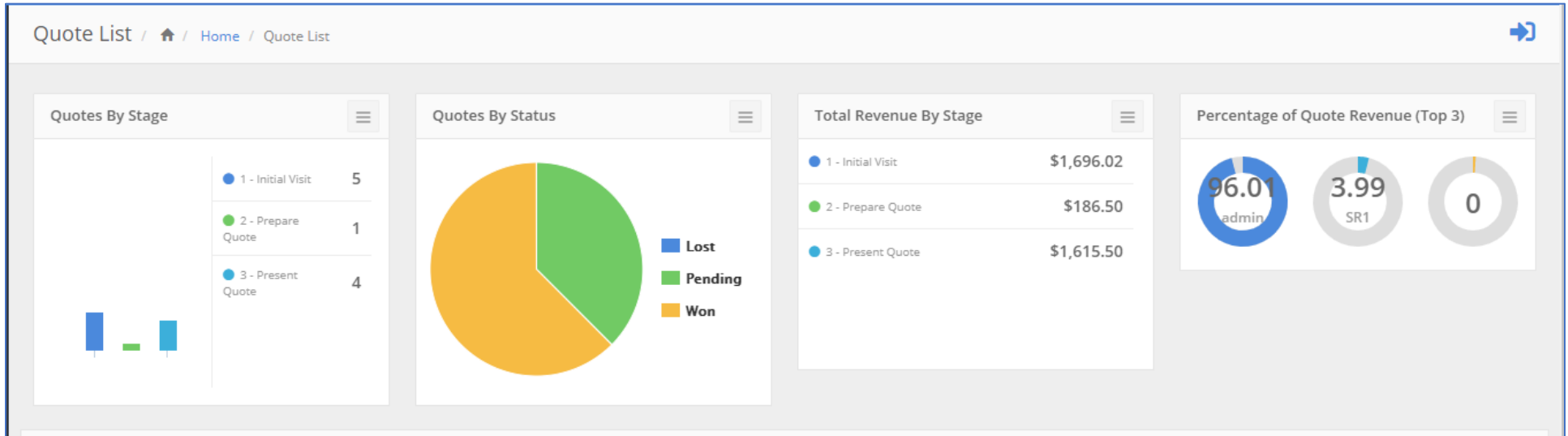
This setting is used to determine how your customer will receive their monthly statement, or on-demand printed invoices from the A/R team

- None – default value, meaning they will not receive a statement (mainly used by Corporate Accounts)
- Mail – they will receive a hardcopy emailed statement
- E-Mail - they will receive an emailed statement (they must have a valid email address on the customer card)

RSO – LEADS & QUOTES

Quote List

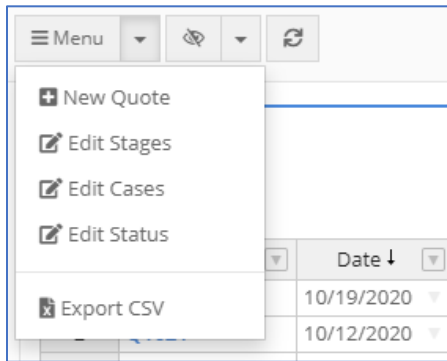
The quote will now appear on your Quote Dashboard:



And Grid, where they are also exportable to Excel:

	Quote #	Date	Entered By	Customer	Case	Stage	Status	Follow Up	Awarded	Rejecte
1	Q1022	10/19/2020	admin	Ace Hardware - Hanschkeville						
2	Q1023	10/19/2020	admin	Enviro Testing School - Location A		Prepare Quote	Pending	11/02/2020		
3	Q1021	10/12/2020	admin	TEST						
4	Q1018	10/01/2020	admin	Ace Hardware - Hanschkeville		Initial Visit	Won			
5	Q1019	10/01/2020	admin	mm1						
6	Q1020	10/01/2020	admin	mm2		Initial Visit	Pending			
7	Q1017	09/01/2020	admin	MH-LEAD-01		Present Quote	Won			

Stages, Cases and Status are maintained from the Menu dropdown under the Quote List:



The screenshot shows a software interface with a menu and a table. The menu is open, displaying the following options:

- New Quote
- Edit Stages
- Edit Cases
- Edit Status
- Export CSV

Below the menu, a table is partially visible with a column header 'Date ↓'. The table contains the following data:

Date ↓
10/19/2020
10/12/2020

RSO – LEADS & QUOTES

Pre-populated Stages:

Maintain Stage List
✕

Order	Stage	Avg. Time	Point Value	Actions
1	Call	1 Days	1	
2	Meeting	7 Days	2	
3	Proposal	1 Days	3	
4	Demo	7 Days	0	
5	Closed	14 Days	0	

Order

Stage Name

Avg Timeframe (days)

Point Value

Pre-Populated Status:

Maintain Status List
✕

Status	Actions
Lost	
Pending	
Won	

Status

Add