FieldEdge PREMIER

MUTLI-OPTION QUOTING ENHANCEMENTS

Whether you're suggesting different equipment choices, multiple repair options or even brand preference, the Multi-Option Quote feature in FieldEdge Premier allows you to easily provide your customers with the power to choose the option that best fits their needs. Utilizing Multi-Option Quotes, you can easily build, organize and present more than one option when building a quote in FieldEdge.

What are the Benefits?

By providing multiple options, your team is equipped with the tools to generate higher average ticket prices, increase your quote conversions and generate more sales.

When customers want to revisit quotes offered to them in the past, quickly pull up a history of the various options you presented.

Easily keep track of quote conversion rates and identify which options your customers selected.

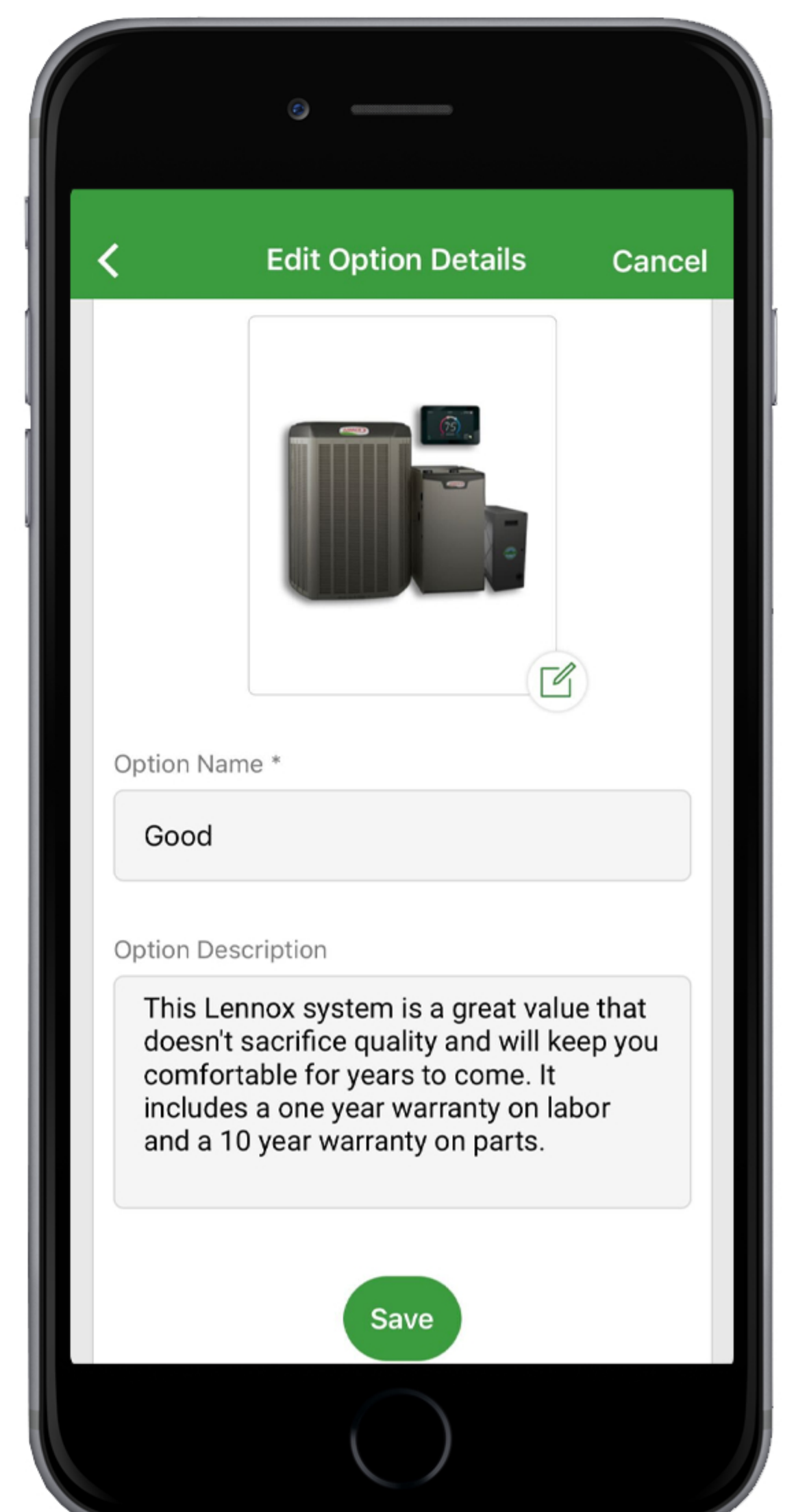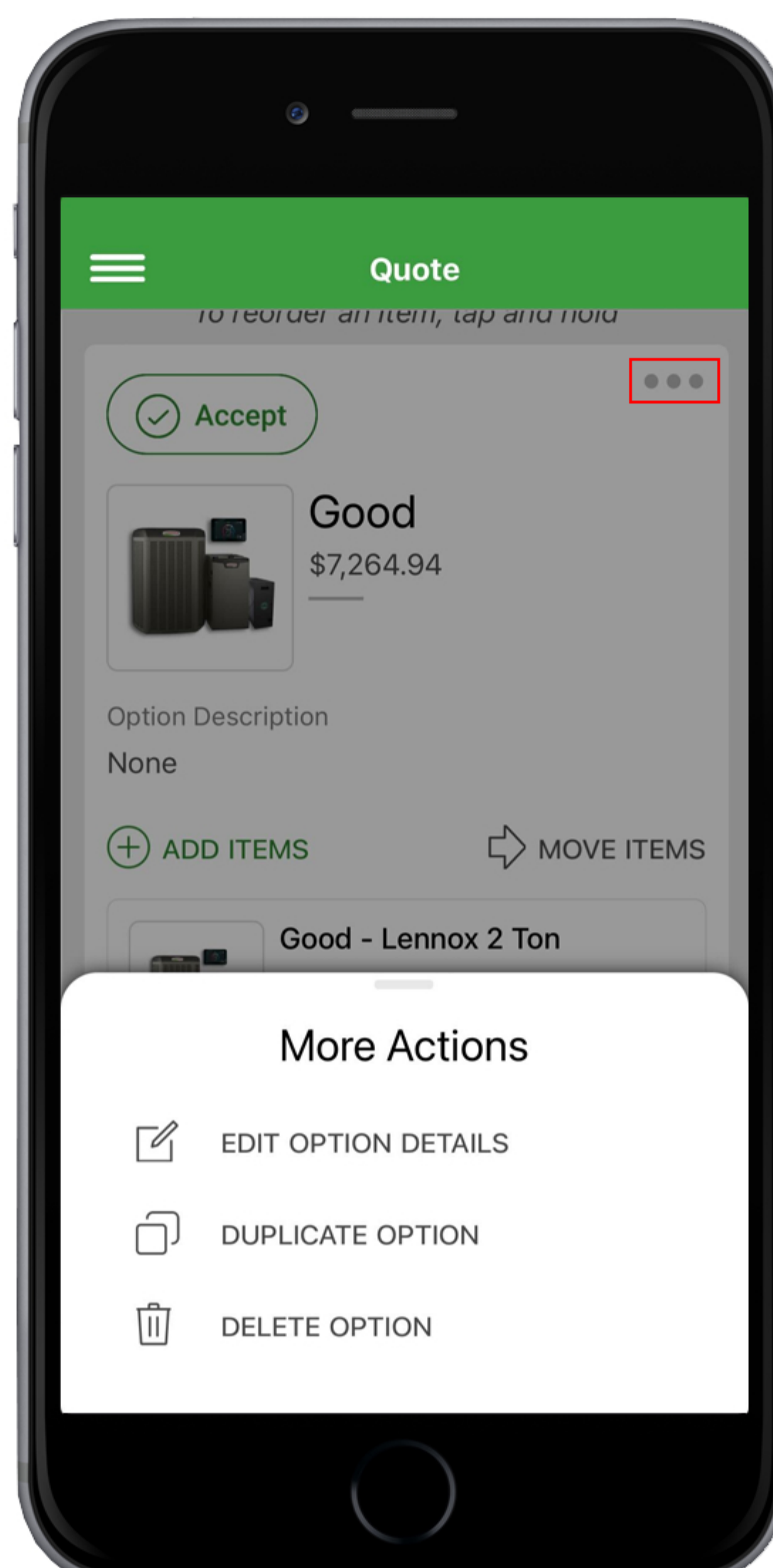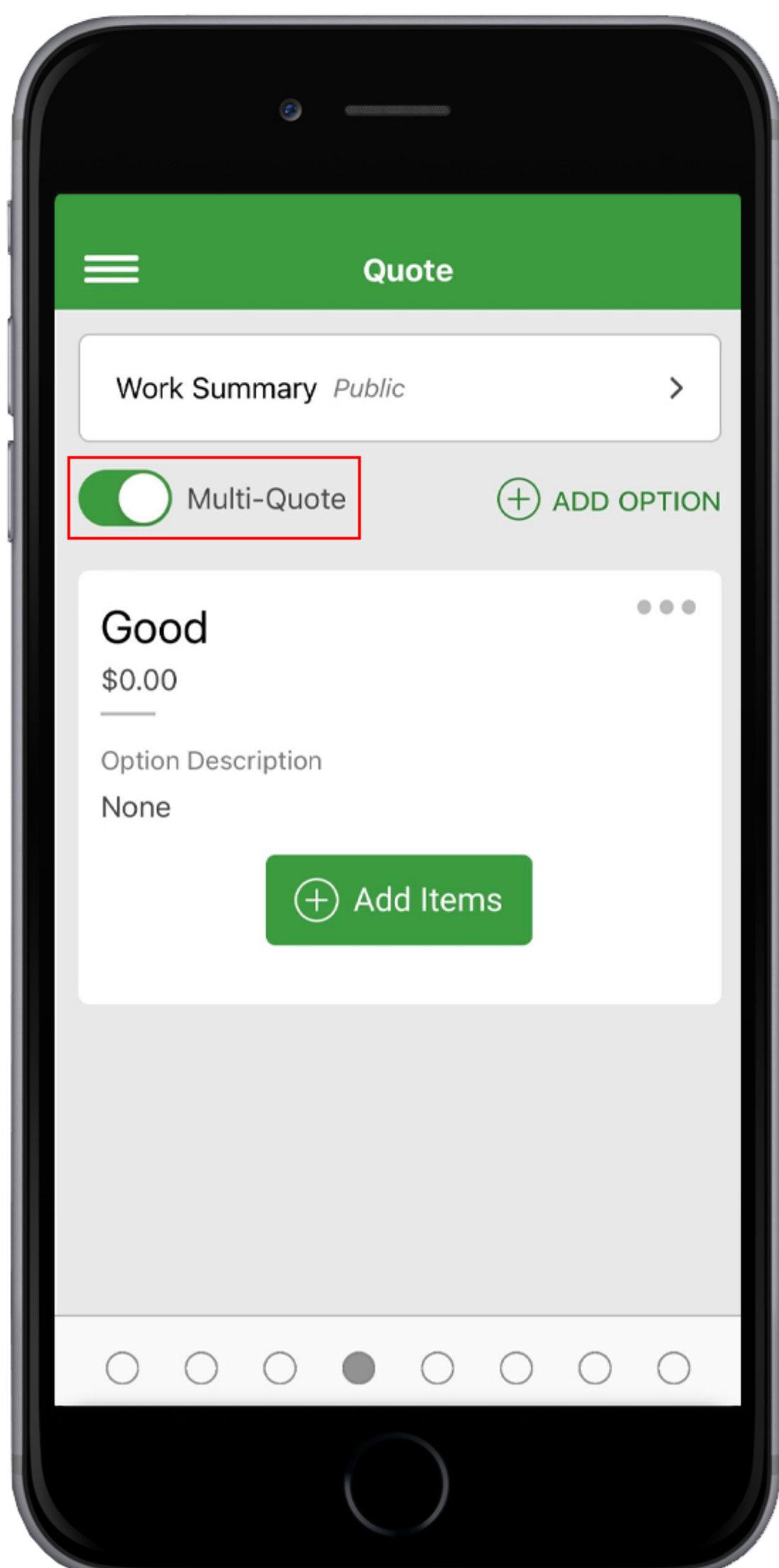## Building Multi-Option Quotes with the Mobile App

Creating Options

Click the **Multi-Quote** toggle at the top of the Quote page to enable Multi-Option Quoting.

Quote Actions

Quickly duplicate, delete or edit the details of an option by using the **Action Menu** at the top of the Option screen.

Option Details

Use the **Edit Option Details** screen to easily give your option a title, add a description, and attach a photo for a more professional presentation.
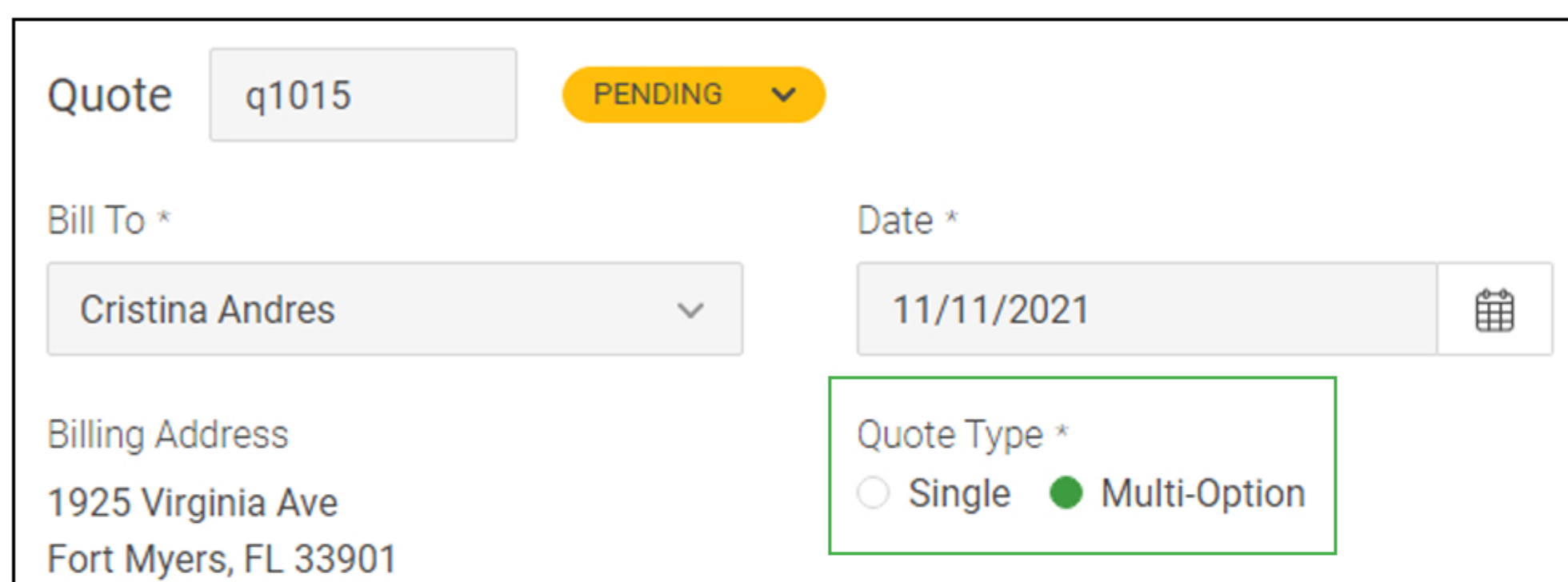
Managing Multi-Option Quotes from the Office

Enabling Multi-Option Quoting

Using the new toggle at the top of the Quote, you can quickly change your Quote type from Single to **Multi-Option**.
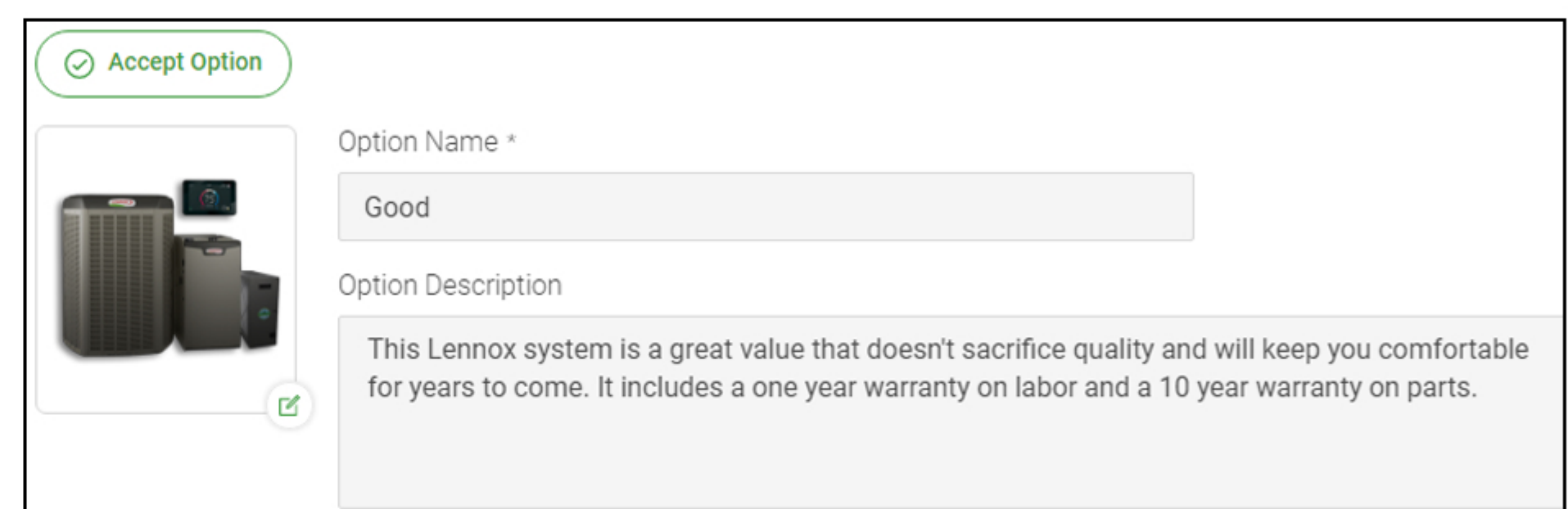

Multi-Option Quote Features

Once the Multi-Option Quote has been enabled, you will see new fields: **Option Name, Option Description and Option Picture**. These fields will be displayed above the line items on the customer-facing quote.
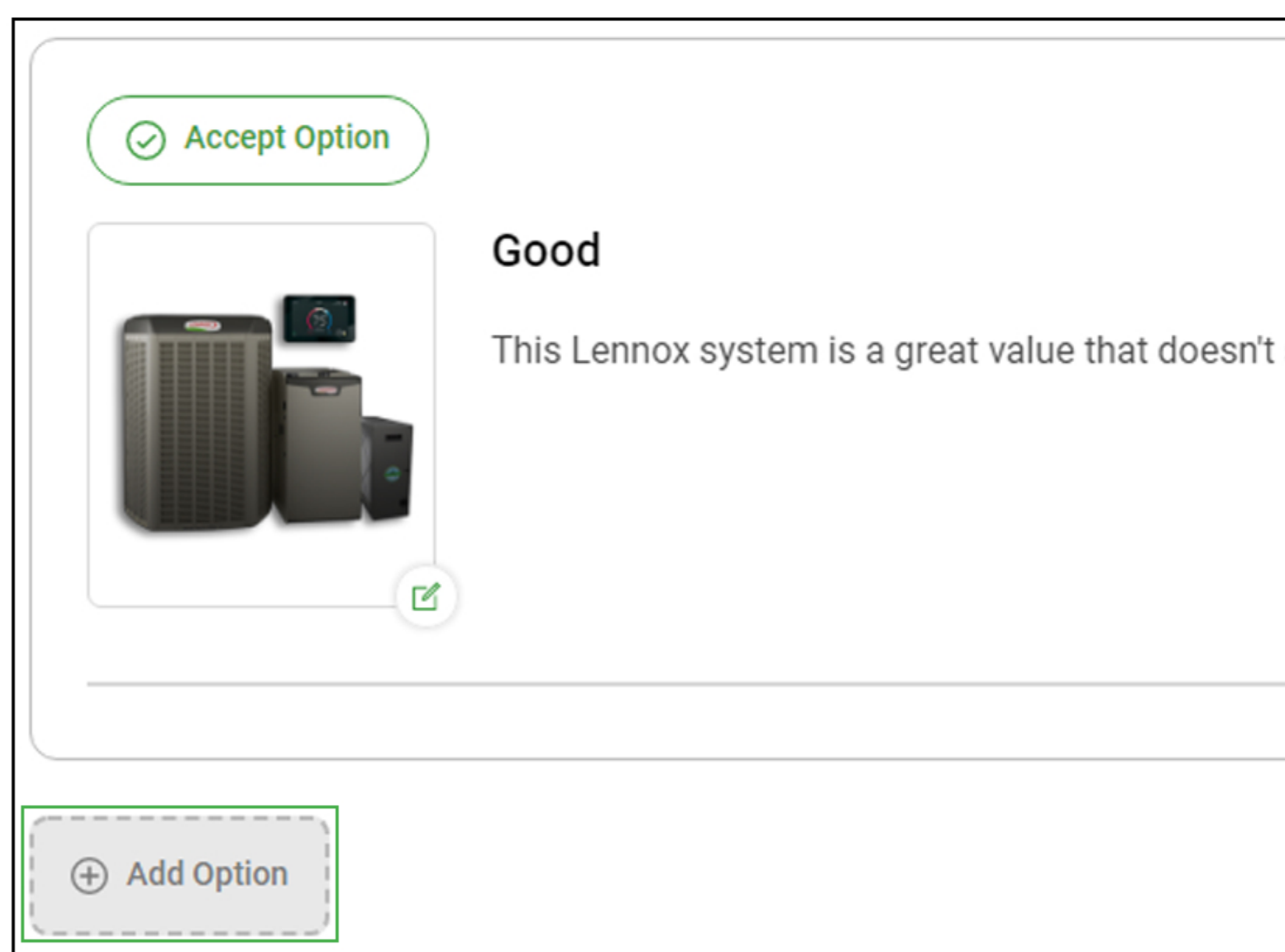

Adding an Option

Once items have been added to the quote, continue building out additional options by clicking the **Add Option** button.

Accepting an Option

Once your customer confirms, mark the selected option as Approved by clicking **Accept Option**.

Layout Templates

To view and setup the two new Multi-Option Quote layout templates, go to **Settings > Layout Templates** and modify as needed.

Managing Quotes from the Office

Emailing a Quote

When emailing your customer a quote with multiple options, the new Multi-Option Quote template will automatically show the option image and description.

Quote q1308

Good   Total: $6,899.00
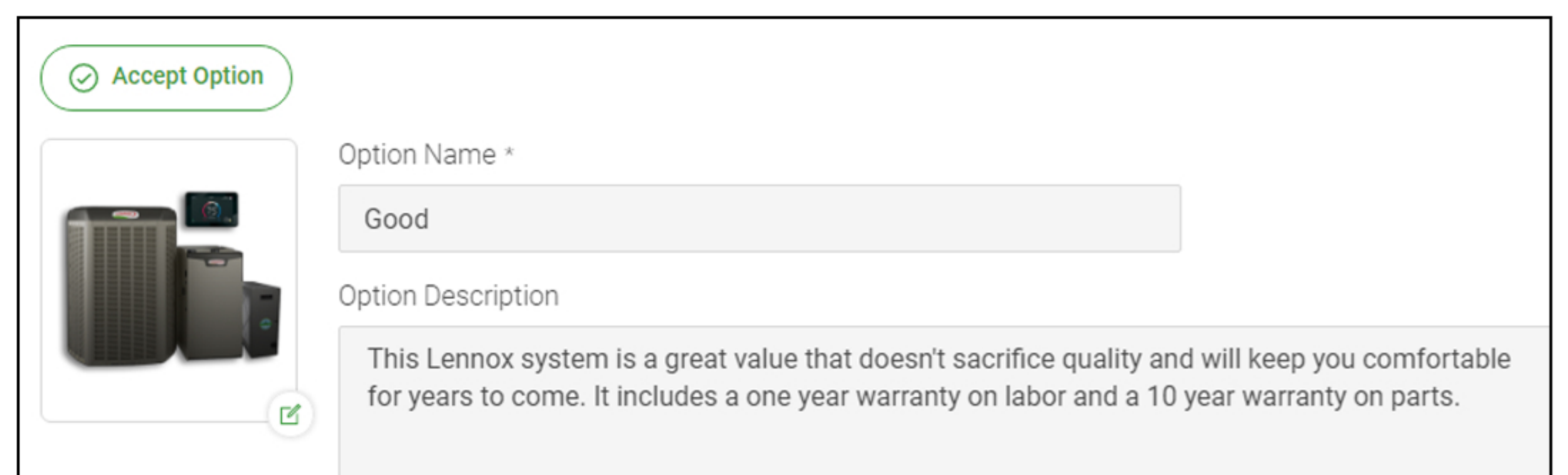
This Lennox system is a great value that doesn't sacrifice quality and will keep you comfortable for years to come. It includes a one year warranty on labor and a 10 year warranty on parts.

Item	Description	Equipment	Quantity	Price	Amount
Good - Lennox 2 Ton	Lennox 2 Ton System		1	$6,899.00	$6,899.00

Subtotal:	$6,899.00
Tax:	$365.94
Total:	$7,264.94

Quote Option Actions

Easily duplicate, delete, or rearrange quote options by using the action menus at the top right of the option.

≡ Rearrange Options

• • •

📋 DUPLICATE OPTION

🗑 DELETE OPTION

Reporting

Before any quote options are approved, the quoted amount will show as the highest value option. Once a quote option is approved, the quoted amount will change to reflect this value. The Quote List and Quote micro-dashboard within the work order will show these values in all reporting.

Quote

Multi-Options	3
Quoted	$6,479.10

Quote

Accepted	$6,034.43
Quoted	$6,034.43

Quote #	Date	Status	Expiration Date ▲	Amount
Q1040	05/07/2020	Pending	06/06/2020	$2,900.43
Q1036	05/07/2020	Accepted	06/06/2020	$6,034.43
Q1032	05/07/2020	Scheduled	06/06/2020	$3,384.91