RG OP.1 – Sales Inspections & Locations

Quick Reference Guides · https://milo.masseyservices.com/docs/rg-op-1-sales-inspections-locations/

Booking the Initial Sales Inspection

1. Open an Opportunity.
2. Click **Create Sales Inspection** in the Quick Action ribbon.
3. Select the Service Location & the Service Territory.
4. Open the Service Appointment generated by Salesforce.
5. Schedule the appointment by choosing one of the following options:
   - **Candidates**
   - **Book Appointment**
6. Select a date & time range for the appointment.
7. Salesforce takes care of the rest.

Managing Service Locations

1. Open an Opportunity or Account.
2. Click **Update Service Location** in the Quick Action ribbon.
3. Select the Service Location and click **Next**.
4. Fill out the required fields:
   - **Residence Type**
   - **Location Type**
5. Complete any other fields needed.
6. Click **Next** to save the updates.

Creating a New Service Location

1. Open an Opportunity or Account.
2. Click **Create Service Location** in the Quick Action ribbon.
3. Follow the prompts to add the new location



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