

# QRG 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.

*You can edit the Earliest Start Permitted in the Time Constraints if you need to have a different time-range than what Salesforce automatically provides.*

## 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.