

## Managing Your Final Notes Using the Management Portal

The management portal makes it easy to **view**, **add**, and **manage** your final notes in Sales Builder Pro.

**Final Notes**

Click **Manage** to View, Organize, Add, Remove, or Change default to On or Off

[Manage](#)

[Export \(.xlsx\)](#)

[Export \(.csv\)](#)

Final Notes					
<small>Company: John's Sample HVAC</small>					
<small>Last Update: 07/26/17 4:51 PM by Gina Sarkey</small>					
Active					
Preview	Show on Proposal	Send to Back Office	Default On	Last Update	
Floor protection is used during the entire install.	Yes	No	Yes	07/26/17 4:51 PM Gina Sarkey	
All required permits are included.	Yes	No	Yes	07/26/17 4:51 PM Gina Sarkey	
All applicable sales and local taxes are included.	Yes	No	Yes	07/26/17 4:51 PM Gina Sarkey	
All necessary materials and supplies to complete installation are included.	Yes	No	Yes	07/26/17 4:51 PM Gina Sarkey	
Inactive					
Preview	Show on Proposal	Send to Back Office	Default On	Last Update	
Operational ductwork, venting, electrical wiring and drains are used as needed.	Yes	No	Yes	07/26/17 4:51 PM Gina Sarkey	
Used (replaced) equipment is removed and recycled as appropriate.	Yes	No	Yes	07/26/17 4:51 PM Gina Sarkey	
Used refrigerant is reclaimed and recycled in accordance with EPA Standards.	Yes	No	Yes	07/26/17 4:51 PM Gina Sarkey	



To view your final notes, click the blue **Manage** button in the Final Notes section of the Management portal.

All of the final notes listed under the **Active** header will appear in the app, and all of the final notes listed under the **Inactive** header will be hidden.

To **add** a new final note, select the green plus sign at the bottom of the list.

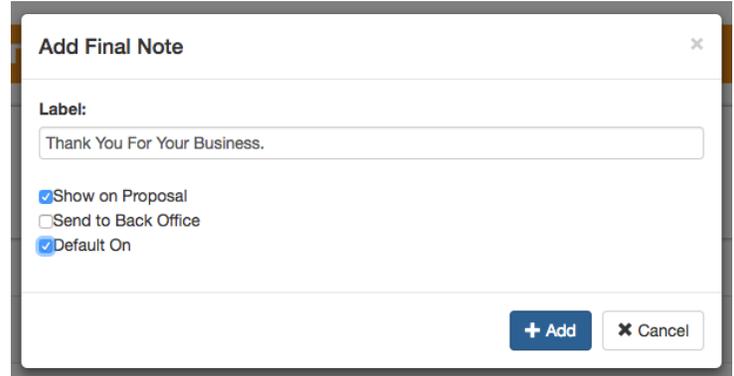
The **Label** is the actual text of the final note. By default, a text box will appear after your label, so that you can use this to gather information.

**Show on Proposal** indicates that it is a customer-facing note, while **Send to Back Office** indicates that you are gathering information that will be important to your scheduling, installation, or billing departments internally, like payment terms or special instructions about the installation.

**Default On** indicates that the Sales Representative will not have to toggle this note on for every proposal. Instead, it will be there by default every time.

**Note:** If a final note is marked as **Default On**, you will **not** be able to turn it off in the field, so you should save this status for notes that you definitely want to appear on every proposal.

When complete, click **Add** to add the note to your Active list.



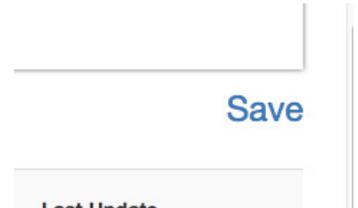
Active

Preview	Show on Proposal	Send to Back Office	Default On	Last Update
Used (replaced) equipment is removed and recycled as appropriate.	Yes	No	Yes	08/04/17 9:40 AM John Steidley
Floor protection is used during the entire install.	Yes	No	Yes	08/04/17 9:40 AM John Steidley
All required permits are included.	Yes	No	Yes	08/04/17 9:40 AM John Steidley
All applicable sales and local taxes are included.	Yes	No	Yes	08/04/17 9:40 AM John Steidley
All necessary materials and supplies to complete installation are included.	Yes	No	Yes	08/04/17 9:40 AM John Steidley
50% due upon signing <input type="text"/>	Yes	No	No	08/04/17 9:40 AM John Steidley

Inactive

To **deactivate** or **remove** a Final Note, select the line item by hovering over the blue arrow icon, and **drag** it down to the Inactive section. You can also use the blue arrow icon to re-order notes within the Active list, to help you sort them in a logical way for your workflow.

After making any change to the order or status of a final note, a **Save** button will appear on the right-hand side, and you will need to save your change before making another change. To **cancel** your change, simply **refresh** the page.



## Final Notes FAQ

**What are some examples of notes that should be sent to the back office vs. shown on the proposal?**

Send to Back Office –

- Notes about the way that the customer has paid or invoicing instructions
- Special instructions about the customer’s home (Dogs in home, please call ahead)
- Special instructions about the installation (Furnace is in the attic, extra labor required)

Show on Proposal –

- Customer-facing notes about the installation (Floor protection is used during the entire install)
- Customer-facing inclusions (All necessary materials and supplies to complete installation are included.)

**I still have questions about my final notes!**

No problem! Please feel free to contact your Customer Success Specialist by email, and we’d be glad to walk you through the process.