

Navigation Menu Overview

Quick Proposal – bypasses the Scheduling function, use when you are in a hurry

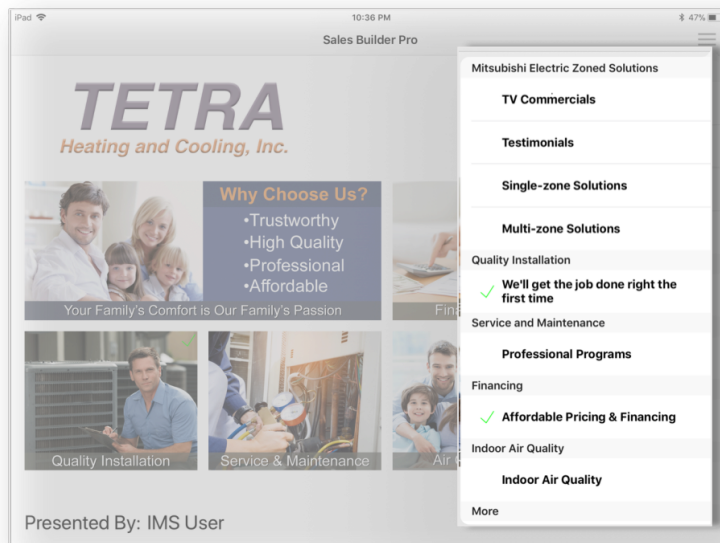
View Schedule – to display today's scheduled jobs (appointments)

Search – Search for a previously created proposal by Customer Name or date

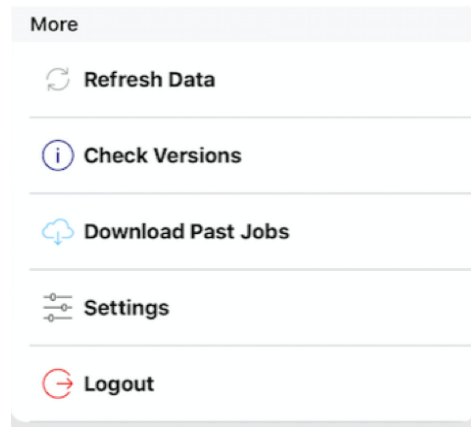
Schedule Jobs – schedule a job for today or a day in the future

Presentation Section:

Quick navigation to Presentation assets; brochures, images, videos

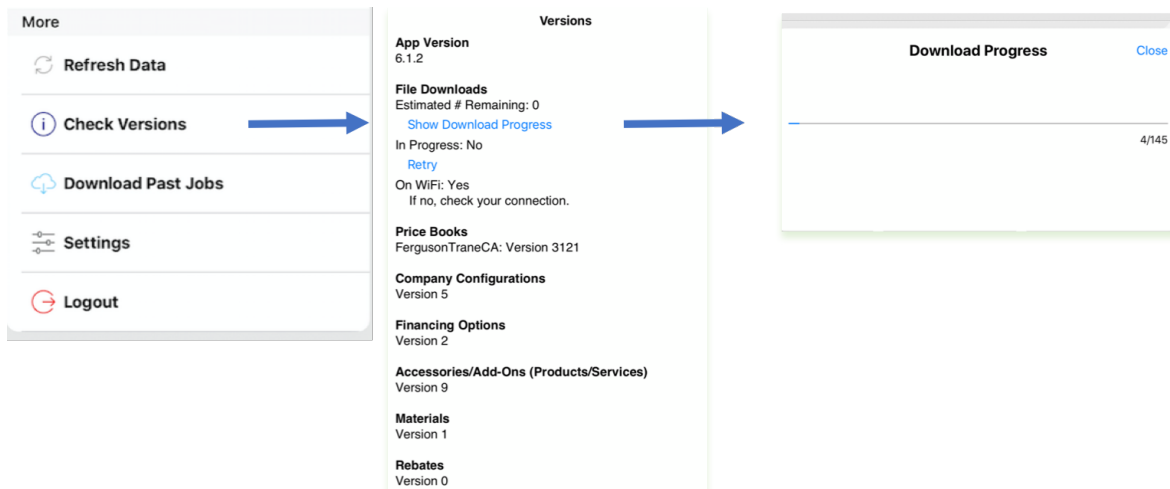


More



Refresh Data – Use this feature when you need to pull database changes mid-day

Check Versions – allows you to check the progress of a refresh. Check here to see if the refresh has completed. Do not start a new quote if the price book download has not completed. Tap [Show Download Progress](#) to see how many files are left to download. If the download is not in progress, tap [Retry](#).



Download Past Jobs pulls all of the proposals you have written from the database and all of the customers associated with your company. Use this feature when you sign-in to a new table

Settings:

Changes will apply to all **NEW** quotes.

Show Model Numbers - slide ON (green) to display model numbers on the Customer proposal

Show Line Item Pricing

- **ON (green)** to show pricing (\$) for ALL items on the customer proposal
- Slide OFF to present proposal with the system total.

Send Brochures with Proposal Email. Slide on to send links to brochures with the customer email.

Select **Parts, Labor, Compressor Warranty or Guarantee label.** Label displays on the customer Proposal

Ductless Design Criteria Mitsubishi Electric default Parameters

Taxes & Fees – this section adds Sales Tax to the full system price and displays on the Customer proposal when selected. Tap "+" to add a Sales Tax and Fee to autopopulate in the app. Salesperson will select the appropriate tax or fee when building a quote. on or off the

Logout - it's a good idea to Logout at the end of the day. If you are on a network all data will sync to your company database. If you are not on a network the data will remain on your tablet and sync when a network is available.

Cancel Settings Save

Proposals

Show Model Numbers

Show Line Item Pricing

Send Brochures With Proposal Email

Parts Label Warranty

Labor Label Warranty

Compressor Label Warranty

Heat Exchanger Label Warranty

Ductless Design Criteria

	Cooling		Heating	
Indoor Temperature	<input type="text"/>	°F WB	<input type="text"/>	°F DB
Outdoor Temperature	<input type="text"/>	°F DB	<input type="text"/>	°F WB
Altitude	<input type="text"/>			ft

Taxes & Fees

Show Taxes & Fees by Line Item