



## Viewing Your Usage & Scheduling Jobs Using the Management Portal

The management portal makes it easy to **schedule** new jobs and **view** your company's usage of Sales Builder Pro by user.



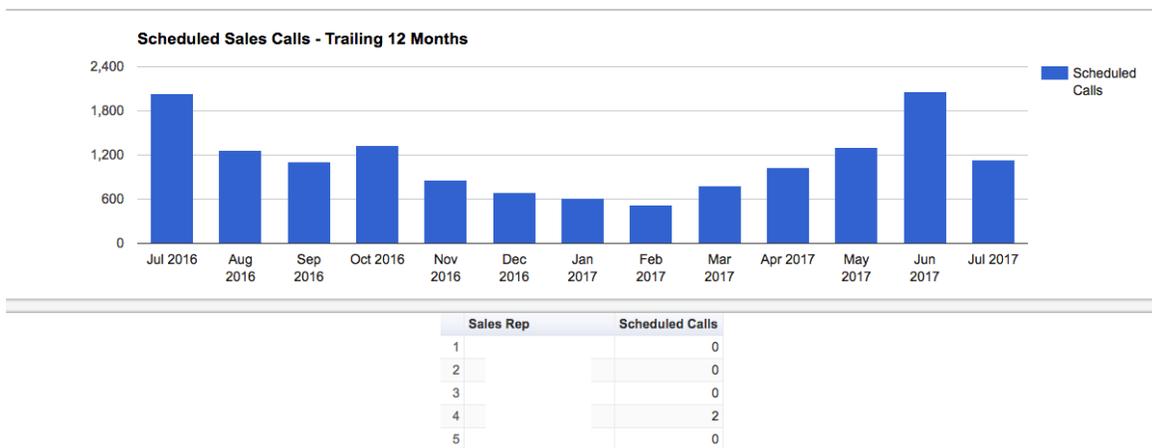
### Usage and Scheduling

Click **View** to see Scheduled Sales Calls from the prior 12-months  
Click **Schedule** to manage Scheduled Sales Calls.



To access **Usage** by Sales Representative, select the blue **View** button on the right side of the Usage and Scheduling Section.

This view will show you, at a glance, how many sales calls have been scheduled using Sales Builder Pro in the past 12 months by Sales Rep.



### Usage and Scheduling

Click **View** to see Scheduled Sales Calls from the prior 12-months  
Click **Schedule** to manage Scheduled Sales Calls.



To schedule a job in Sales Builder Pro online, select the blue **Schedule** button in the Usage and Scheduling section.

The simple online job scheduling interface is very similar to the interface in the app.

To view today's schedule, select **View Schedule** in the top navigation bar.



## Today's Jobs

## Future Jobs

## Past Jobs

[Show Past Month](#)

To schedule new jobs, select **Schedule Jobs** in the top navigation bar.

To search for an existing customer, enter their name or customer number, and to add a new customer, select **Add Customer**.

**Customer #**

Customer Search

**Customer Name**

[🔍 Search Customers](#)

[+ Add Customer](#)

Enter the customer information, job address, and billing address for your customer.

✔ Save
✕ Cancel

**Customer**

Customer Number:

Customer Name\*:

Phone:  Mobile:

Email:

Customer Class: Johns

**Customer Info**

Lead Source:

Territory SSIN:

**Contact / Caller**

Contact:

Contact Phone:  Caller Phone:

**Job Address**

Address Line 1:

Address Line 2:

City:

State:  Zip:

**Billing Address**  Same as Job Address

When finished, click **Save**.

Customer #	Customer Name	GS Test <span style="float: right;">👤 Edit</span>	
12345	GS Test	Customer #: 12345	<b>Contact</b> Gina Sankey <b>Contact Phone</b> 4127192134 <b>Caller Phone</b> 4127192134
12345	GS Test	<b>Phone</b> 4127192134 <b>Mobile</b> 4127192134 <b>Email</b> ginasankey@gmail.com	
2017001	John Steidley	<b>Customer Class</b> Johns	
0	Test1	<b>Lead Source</b> <b>Territory</b>	
		<b>Job Address</b> 2228 Wrenford Rd University Heights, OH 44118	<b>Billing Address</b> 2228 Wrenford Rd University Heights, OH 44118
		<b>Jobs</b> <span style="float: right;"><a href="#">+ Add Job</a></span>	

To add a job to a customer, select the customer's name from the list and select the blue **Add Job** button.

Complete the job information, and click **Save** when finished.

✔ Save

**Customer**

Customer Number:

Customer Name:

**Job Info**

Job Number:

Trade Type: HVAC

**Date & Time**

Scheduled Date\*:

Start Time\*:

End Time:

**Notes**

**Assigned To**

IMS Sales (samplehvac@imobilesupport.com)

**Items to Quote**

## Usage and Scheduling FAQ

### **Where can I see more detailed analytics about each proposal?**

If you have purchased the optional Sales Management tools, you can access them in the Sales Management Tools of the Management portal. If you'd like to upgrade, contact [sales@imobilesupport.com](mailto:sales@imobilesupport.com) for more information!

### **Do I need to schedule a job from the portal for my sales representatives to use the app?**

No, the sales representatives can always add a customer and a job on their tablets while they're out in the field. If they're adding a new customer, they can even do a Quick Proposal that allows them to jump right to building a quote.

### **I still have questions about Usage and Scheduling!**

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