



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.



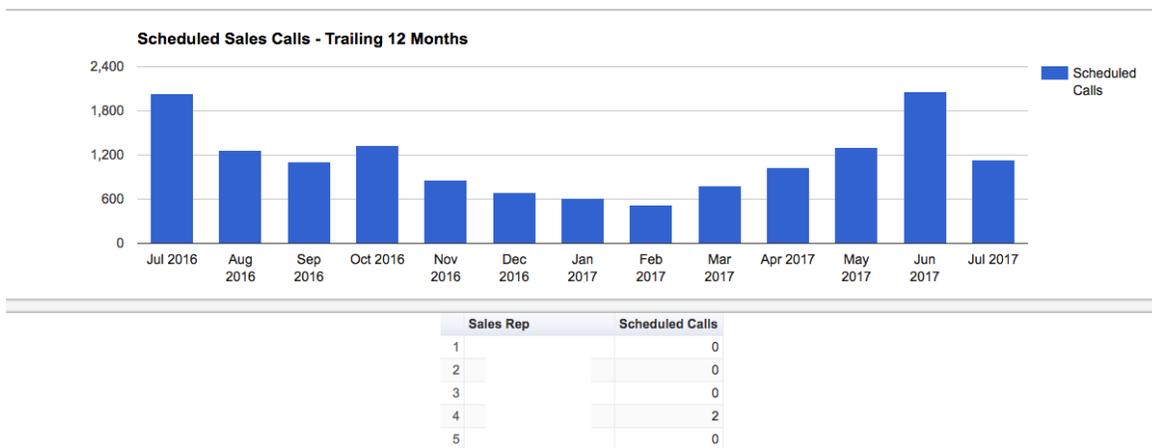
Usage and Scheduling

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:

Job Address

Address Line 1:

Address Line 2:

City:

State: Zip:

Contact / Caller

Contact:

Contact Phone: Caller Phone:

Billing Address ☑ Same as Job Address

When finished, click **Save**.

Customer #	Customer Name	GS Test 👤 Edit	Contact
12345	GS Test	Customer #: 12345	Gina Sankey Contact Phone 4127192134 Caller Phone 4127192134
12345	GS Test	Phone 4127192134 Mobile 4127192134 Email ginasankey@gmail.com	
2017001	John Steidley	Customer Class Johns	
0	Test1	Lead Source Territory	

Job Address Billing Address

2228 Wrenford Rd
University Heights, OH 44118

2228 Wrenford Rd
University Heights, OH 44118

+ Add Job

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 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.