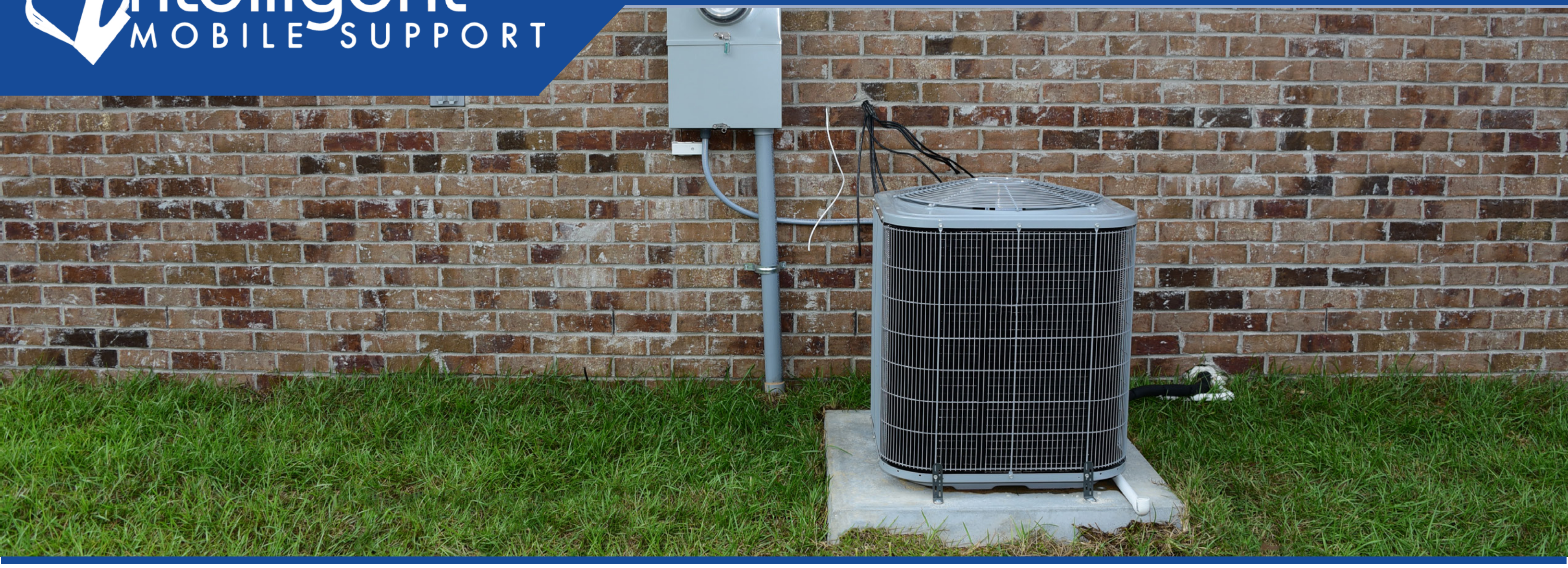
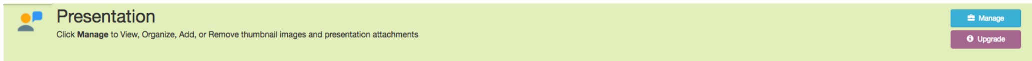
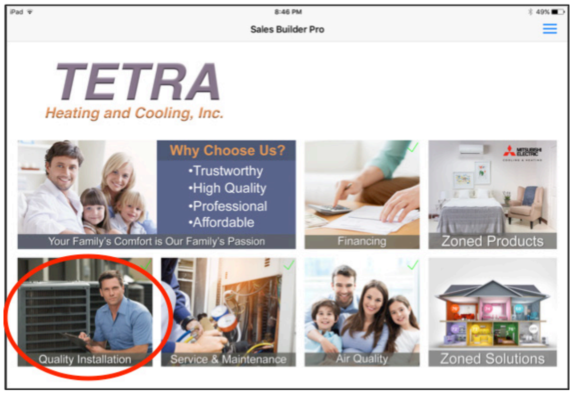
Sales Builder Pro Portal: **Presentation**



Managing Your Presentation Using the Management Portal

The management portal makes it easy to **view** and **manage** the contents of your Sales Presentation in Sales Builder Pro.

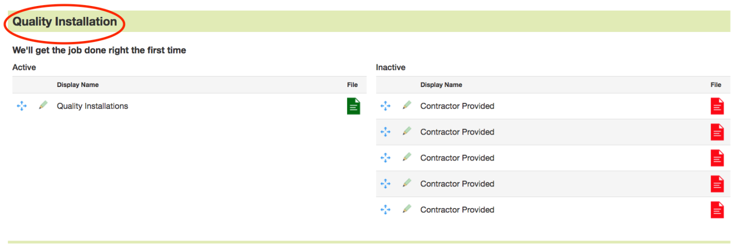




To view your presentation contents, click the blue **Manage** button in the Presentation section of the Management portal.

The presentation management page will display the contents behind each button on your home screen.

The categories will be pre-configured for you by your Customer Success Specialist, as determined by the presentation package you chose when you purchased Sales Builder Pro.

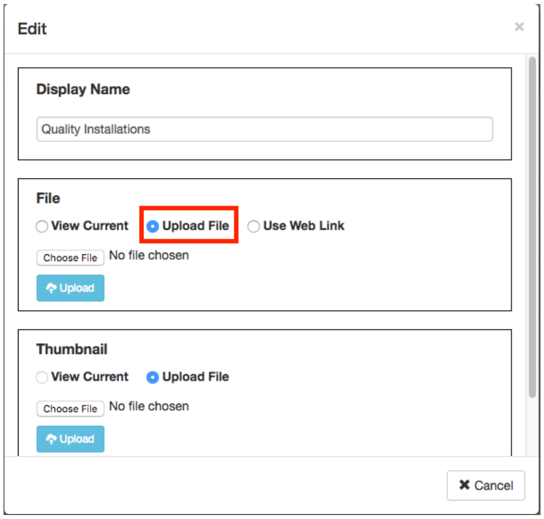


In the example at left, you can see that the **Quality Installation button** in the app coordinates with the **Quality Installation section** of the Presentation Management page in the Management Portal.

All of the 'Contractor Provided' line items are placeholder spots for you to upload your own graphics, brochures, and web links.

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

As with other sections of the Management portal, you can use the blue arrow icon to drag line items from Inactive to Active and vice versa.

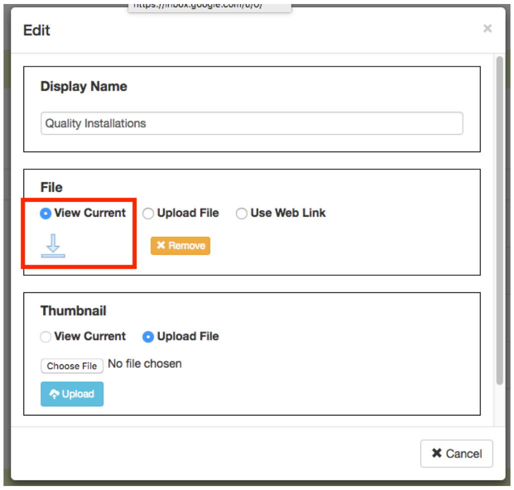


To **edit** a line item, click the pencil icon on the line item.

The **Display Name** is the name that will appear in the menu on the app, so it should be intuitive and user-friendly.

After entering the display name, remember to click **Save** so that the title is saved.

You can upload your file into the File section by choosing a file from your desktop and clicking the blue **Upload** icon.



If there was a file previously loaded, you can download it by switching to **View Current**, and then clicking the arrow icon.

You can also upload a thumbnail to display on the menu next to the display name. The recommended thumbnail size is 250 pixels by 250 pixels.

Presentation FAQ

What file types are recommended for my presentation?

The best file formats are .PNG, .JPG, and .PDF. You can also link to a website, but be aware that if your tablet is not connected to the internet, you won't be able to load the web link.

What types of items do other customers typically load?

It varies based on the individual needs of the contractor, but here are some common examples:

- Before and After Pictures
- Customer Testimonials
- Financing applications
- Maintenance Agreements
- Promotional flyers
- Spec sheets that the sales representatives can use as reference points

It's not necessary to add all of your product brochures to the Sales Presentation, because Sales Builder Pro shows brochures in the proposal process when you're quoting equipment.

I need to add more assets, how can I upgrade my presentation?

Sure! You can add more assets by contacting your Customer Success Specialist. They will provide you with a quote to customize your presentation.

I still have questions about my Sales Presentation!

No problem! Please feel free to contact your Customer Success Specialist by email, and we'd be glad to walk you through the process. We will also have live classroom training available for pricing rules as well.