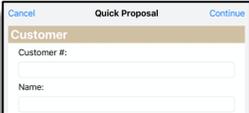
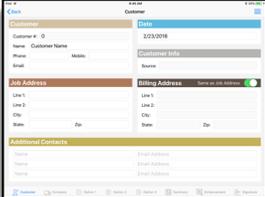
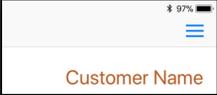
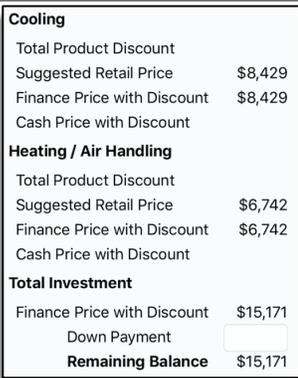
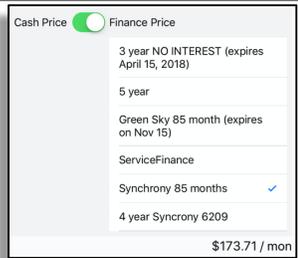
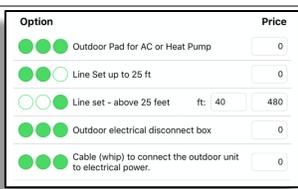
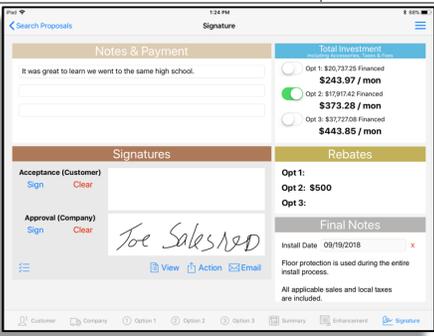


	Icon / View	Action	Notes
1		Touch the Sales Builder Pro icon	To get the app, from your iPad, search the app store for “Sales Builder” and touch install
2		Touch the Navigation menu icon	Located in the upper right-hand corner
3		Select Quick Proposal Note: If your sales calls (jobs) are scheduled for you, tap View Schedule to view Customers	Hint: Your company logo is a short cut to your schedule page
4		On the Quick Proposal popup: <ul style="list-style-type: none"> • Touch Name • Touch Continue 	<ul style="list-style-type: none"> • Customer Class and Trade Type should default to the correct values • Customer #, Lead Source, and Job # are optional
5		Fill in all necessary Customer info	Hint: Use commas to separate more than one Email address
6		Touch Back to get to Home <ul style="list-style-type: none"> • < Back is located in the upper left-hand corner 	<ul style="list-style-type: none"> • You may also use the Navigation menu to go to the Home screen
7		Use the Home screen to make your sales presentation <ul style="list-style-type: none"> • Touch buttons (or tiles) to open various Attachments (e.g., videos, PDFs, and pictures) 	<ul style="list-style-type: none"> • Focus on what sets you apart from your competition – your differentiators. • Answer the question “Why Buy” from you – what unique value do you offer?
8		From the Home view	Touch the Customer Name
9		From the bottom navigation bar	Select Option 1, 2 or 3 to build an equipment proposal option
10		Add Cooling components <ul style="list-style-type: none"> • Touch Type, Manufacturer, Model, and Coil to open drop down pick lists 	<ul style="list-style-type: none"> • Specs, Warranty Information, and a brochure thumbnail appear • Touch the thumbnail to open the brochure
11		Add Heating components <ul style="list-style-type: none"> • Touch Type, Manufacturer, Model, and Electric Heat to open drop down pick lists 	<ul style="list-style-type: none"> • Specs, Warranty Information, and a brochure thumbnail appear • Touch the thumbnail to open the brochure

12		in the More area	Add Notes and an AHRI number
13		Adjust Total Investment (price) using the hidden controls (no underlines)	<ul style="list-style-type: none"> • Total Product Discount adds a visible discount like a service credit – this is shown on the proposal • Suggested Retail Price adds a hidden price change (+/-) to adjust for job difficulty – this is NOT shown on the proposal • Down Payment adds a down payment – this is shown on the proposal
14		Touch Cash Price / Finance Price switch to toggle between these choices	<ul style="list-style-type: none"> • The selected Finance Program is marked with a green checkmark
15		From the bottom navigation bar	Select Summary to view a side-by-side comparison of all 3 options
16		From the bottom navigation bar	Select Enhancement to view Accessory, Add On (Additional Services), and Materials
17		Accessory tab (The Add On tab works the same)	<ul style="list-style-type: none"> • Touch the scroll box to popup a menu of available accessories or additional services <p>Tip: Use Miscellaneous to add something at the point of sale and the Management Portal to update your price book</p>
18		Materials tab	<ul style="list-style-type: none"> • Select Materials for each of the 3 options • Use green circles to indicate which materials belong to which options
19		Signature tab	<ul style="list-style-type: none"> • Add free form notes in Notes & Payment area • Select one or more options in Total Investment area • Add <u>mail-in</u> Rebates here • Note: Add “instant rebates” in Product Discount as those are subtracted from the price • If known, add an Install Date using the date spinner • Add Final Notes using (+) • Approve by touching Sign • View or Email (you must touch email to send) • Use Action to print and for other iPad actions
20	Touch Completed on Schedule view and enter a Completion Code and Completion Notes		