



Deal Manager

What's New?

Use Case Scenarios

Deal Manager – What's New?



Remote Deal Acceptance

Enhanced Search Capabilities

Office User Deal Management

Deal Manager Use Case Scenarios

Kitchen Table Win

Remote Customer Acceptance

Office User Manage the Deal



Kitchen Table Win

9:05 AM Thu May 13

Signature

Notes & Payment

Signatures

Acceptance (Customer)
Sign Clear
Remote

Approval (Company)
Sign Clear

Company Approval

View Action Email

Status

This Proposal	Overall	Options
Pending	Pending	0

Manage

Total Investment
Including Accessories

Opt 1: \$15,647 Balance
\$15,647

Opt 2: \$12,879 Balance
\$12,879

Opt 3: \$5,497 Balance
\$5,497

Rebates

Opt 1:
Opt 2:
Opt 3:

Final Notes

Install Date

All required permits are included.

Deposit required to begin installation equals:

Customer Company Option 1 Option 2 Option 3 Summary Enhancement Signature

- Build a 3 option Quote
- Select an Option
- Company Approval Signature
- Proposal and Overall Deal Status Pending
- Manage the deal - Add Notes

Manage Deal

Additional Notes

- Add Color Coded Notes
- Internal visibility



Sales follow-up
Installation team
Accounts receivable team

9:16 AM Thu May 13 Cancel Manage Deal Save

Deal Notes

System ID #: 604250

Office #:

+ Add additional notes. Internal use only 🗑️ 🔴 🟡 🟢 Done

Wants to talk over with wife. Call back on Monday. 05/13/2021 9:14 AM ... ✍️

Boiler needs to be removed — 2 person job 05/13/2021 9:13 AM ... ✍️

☐ Show Details

Proposal 5/13/2021 9:02:06 AM (Recently Viewed) 📄

Deluxe Equipment <ul style="list-style-type: none">• Gold DA1760• Platinum D96VA1152524M• Deluxe DCF6024M \$15,647	Deluxe Equipment <ul style="list-style-type: none">• Platinum DA2060• Deluxe DCF6021S \$12,879	Mitsubishi Electric Equipment <ul style="list-style-type: none">• MUZ-GL15NA-U1• MSZ-GL15NA-U1 \$5,497
--	---	---

❌ Customer Accepted
✅ Company Approved

Accepted Pending
Declined Obsolete

June Getzinger
5/13/2021 9:02:06 AM

of Options: 0
Total: \$0
Pending
Unsaved Changes

Remote Customer Acceptance

Simple Search

- Customer Name
- Narrow results with date range, proposal status and/or Advanced Filters
- Open the proposal

The screenshot displays a mobile application interface for customer acceptance. The top status bar shows the time as 11:30 AM on Thursday, May 13, and indicates the device is not charging. The interface is divided into two main sections: a search filter panel on the left and a results panel on the right.

Search Panel:

- Search:** A text input field contains the word "kitchen". Below it are three date range filters: "2 Days" (selected), "7 Days", and "30 Days".
- From:** A date picker shows "5/12/21".
- To:** A date picker shows "5/13/21".
- Accepted Declined Pending:** Three radio buttons are present, with "Pending" selected.
- Advanced:** A section with a "Match" label and several filter options, each with a radio button: "Customer Name", "Customer #", "Job #", "Office #", and "System ID #".
- Address Line 1:** A text input field.
- City:** A text input field.
- Zip:** A text input field.
- Job:** A section with "Yes", "No", and "Both" radio buttons. The "Both" option is selected, and there is a green checkmark icon next to it.
- Proposals:** A section with two radio buttons: "Show Obsolete" and "Show Deleted".
- Forms:** A section with one radio button: "Show Deleted".
- Go:** A blue button at the bottom of the search panel.

Results Panel:

- Customers:** A section with the text "Select a customer to show results." and a list of customer entries. The first entry is "Kitchen Table Win" with "Customer #: 0" and a "Pending" status.
- Proposals:** A section with a list of proposal entries. The first entry is "Kitchen Table Win" with "Created: 5/13/21 9:02 AM" and a "Pending" status. Other entries include "Site Survey - Unitary v2.0", "Site Survey - Ductless v2.0", and "Comfort Survey v2.0", each with a "Kitchen Table Win" status and a "Created: 5/13/21 9:01 AM" timestamp.



Build Weekly To Do List

Date filter:

2 days: "HOT"

7 days: "WARM"

30 days: "COLD"




Remote Customer Acceptance

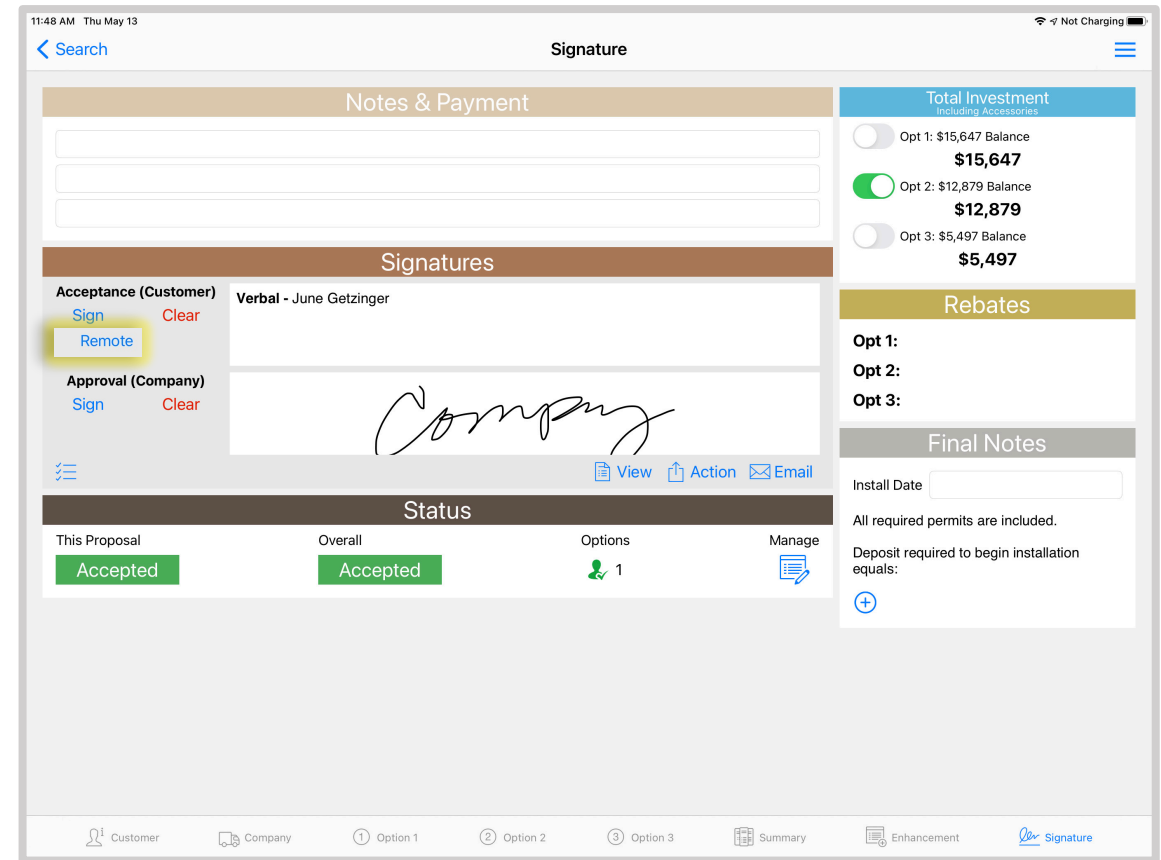
Remote Acceptance

- Customer calls verbally accepts Option 2
- Select Option 2
- Original quote becomes obsolete
- Revised quote is pending



Select mode of Acceptance:

-  Signature on File
-  Email/Written
-  Verbal



The screenshot displays the 'Signature' app interface. At the top, it shows the time '11:48 AM Thu May 13' and a search bar. The main content area is divided into several sections: 'Notes & Payment' with input fields, 'Signatures' with 'Acceptance (Customer)' and 'Approval (Company)' sections, and a 'Status' section at the bottom. The 'Acceptance (Customer)' section has 'Sign' and 'Clear' buttons, with 'Remote' highlighted. The 'Approval (Company)' section also has 'Sign' and 'Clear' buttons. The 'Status' section shows 'This Proposal' and 'Overall' as 'Accepted', 'Options' as '1', and a 'Manage' button. On the right side, there is a 'Total Investment' section with three options: 'Opt 1: \$15,647 Balance' (selected), 'Opt 2: \$12,879 Balance', and 'Opt 3: \$5,497 Balance'. Below this is a 'Rebates' section with 'Opt 1:', 'Opt 2:', and 'Opt 3:' labels. At the bottom right is a 'Final Notes' section with an 'Install Date' field and a note about required permits. The bottom navigation bar includes icons for 'Customer', 'Company', 'Option 1', 'Option 2', 'Option 3', 'Summary', 'Enhancement', and 'Signature'.

Remote Customer Acceptance

The screenshot shows a mobile app interface for "Remote Customer Acceptance". At the top, it displays the time "11:48 AM Thu May 13" and battery status "Not Charging". The main screen is titled "Signature" and contains several sections:

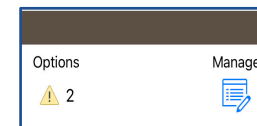
- Notes & Payment:** A section with three empty text input fields.
- Signatures:** A section with two sub-sections: "Acceptance (Customer)" and "Approval (Company)". The "Acceptance (Customer)" section shows a "Sign" button (blue) and a "Clear" button (red). The "Approval (Company)" section shows a "Sign" button (blue) and a "Clear" button (red). Below these is a large signature area with a handwritten signature "Company".
- Total Investment:** A section showing three options with their respective balances: "Opt 1: \$15,647 Balance \$15,647", "Opt 2: \$12,879 Balance \$12,879", and "Opt 3: \$5,497 Balance \$5,497". Each option has a toggle switch.
- Rebates:** A section with three options: "Opt 1:", "Opt 2:", and "Opt 3:".
- Final Notes:** A section with an "Install Date" input field and a note: "All required permits are included. Deposit required to begin installation equals:". Below this is a plus icon (+).
- Status:** A section with four tabs: "This Proposal", "Overall", "Options", and "Manage". The "This Proposal" and "Overall" tabs show a green "Accepted" button. The "Options" tab shows a green icon and the number "1". The "Manage" tab shows a blue icon.

At the bottom, there is a navigation bar with icons for "Customer", "Company", "Option 1", "Option 2", "Option 3", "Summary", "Enhancement", and "Signature".

- Customer Acceptance displays "how" and "who"

Status

- **Accepted** displays for the Proposal and Overall deal Status.
- Options displays the number of options selected



Note: Verification is required when more than one option is selected. "Tap" Manage to verify options.

Proposal PDF

- Remote Acceptance Line

12:04 PM Thu May 13

Kitchen Table Win Proposal

Done

Option 1 Total Investment	Option 2 Total Investment	Option 3 Total Investment
Total: \$15,647 Payment: Cash	Total: \$12,879 Payment: Cash	Total: \$5,497 Payment: Cash

Investment Summary

Equipment	\$26,732
Accessories	\$474
Additional Services	\$740
Install Materials	\$580
Total Investment	\$28,526
Less Down Payment	(-) \$0
Remaining Balance	\$28,526

Remaining Balance Payment Terms

Option 1, 2: \$28,526 Balance.

Remote Acceptance:

Verbal - June Getzinger

Date: 05/13/2021 11:43 AM

Customer Acceptance:

Date:

Company Approval:

2 Option

Date: 05/13/2021 11:57 AM

Company Representative: June Getzinger, juneahr@mobilesupport.com

Notes

All required permits are included.
Deposit required to begin installation equals:



Advanced Search

Advanced Search

- Narrow results Advanced Filters
- Enter Customer Name, Customer #, Job#, Office #, System ID #, Address
- Select date range
- Obsolete and Deleted Proposals will not display
- Turn On "Show Obsolete/Deleted to reopen obsolete and deleted proposals"
- Open the proposal

11:30 AM Thu May 13

Search

Search

kitchen

2 Days 7 Days 30 Days

From: 5/12/21 To: 5/13/21

Accepted Declined Pending

Advanced

Match

Customer Name

Customer #

Job #

Office #

System ID #

Address Line 1

City Zip

Job

Yes No Both

Proposals

Show Obsolete

Show Deleted

Forms

Show Deleted

Go

Search

Customers

Select a customer to show results.

Kitchen Table Win

Customer #: 0

Pending

Results

Proposals

Kitchen Table Win

Created: 5/13/21 9:02 AM

Pending

Site Survey - Unitary v2.0

Kitchen Table Win

Created: 5/13/21 9:01 AM

Site Survey - Ductless v2.0

Kitchen Table Win

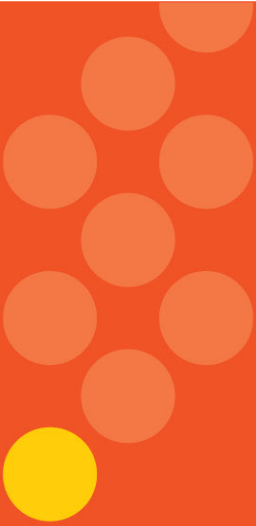
Created: 5/13/21 9:01 AM

Comfort Survey v2.0

Kitchen Table Win

Created: 5/13/21 9:01 AM

Office User



Remote Win in the Office

- Sales Management Tools > Search (New Way) Tab
- Deal Search
- Customer Name, Date Range or narrow results with Advanced Search
- Select the deal to open the Deal Manager

The screenshot displays the 'Search (New Way)' tab in the Intelligent Mobile Support system. The interface includes a search bar with the text 'Kitchen', a search icon, and an information icon. Below the search bar are filters for '2 Days', '7 Days', '30 Days', '1 Year', and 'Custom'. An 'Advanced Search' button with a plus icon and a 'Filters On' link are also present. The 'Results' section shows a table with one entry: 'Matts ME Deluxe Demo' for 'Kitchen Table Win'. The table has columns for Company, Name, Address, Phone (H/M), Date/Time/Status, Deal Status (highlighted as 'Pending'), Acceptance, Amount, Potential, Options, Sales Rep, Lead Source, Customer Class, Trade Type, and Prese. A hand icon points to the 'Pending' status. At the bottom left, there is a pagination control showing '1'.

Company	Name	Address	Phone (H/M)	Date/Time/Status	Deal Status	Acceptance	Amount	Potential	Options	Sales Rep	Lead Source	Customer Class	Trade Type	Prese
Matts ME Deluxe Demo	Kitchen Table Win	31320 Solon Rd Solon, OH 44139	(888) 980-9119 Ext 701	05/13/2021 10:00 AM Complete	Pending			\$15,647.00		June Getzinger		Matts Tetra Basic	HVAC	1

Remote Win in the Office

- Select Option
- Select Customer Acceptance

 Signature on File

 Email/Written

 Verbal

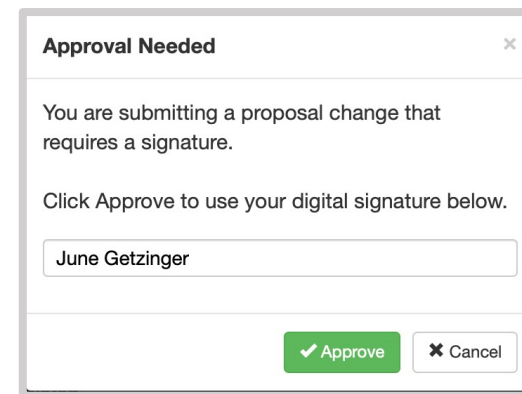
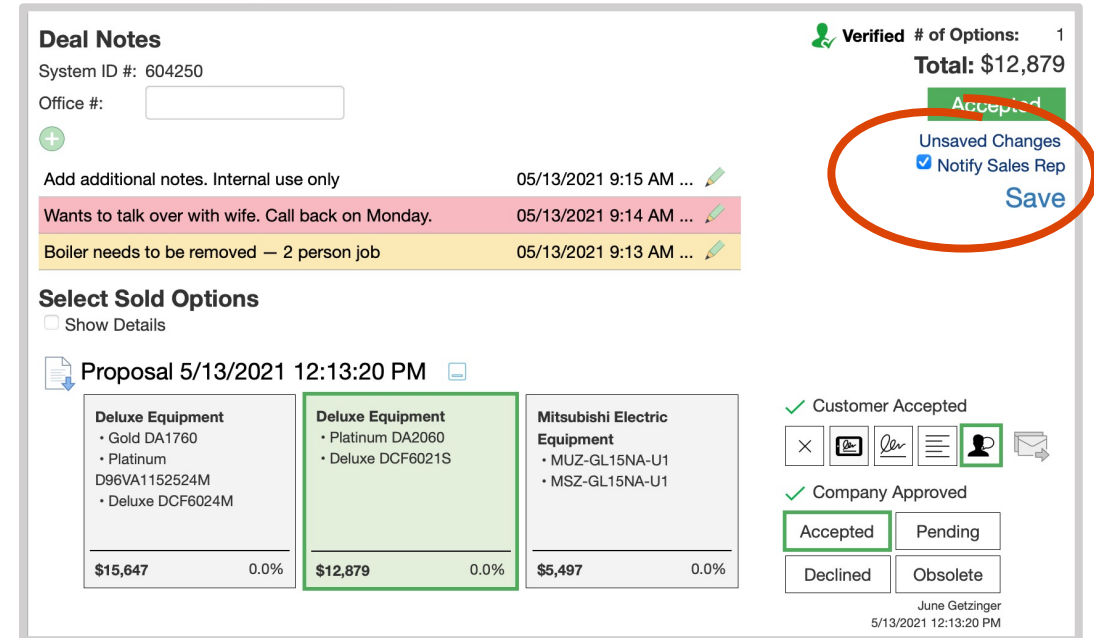
- Enter Office #, Notes

- Save

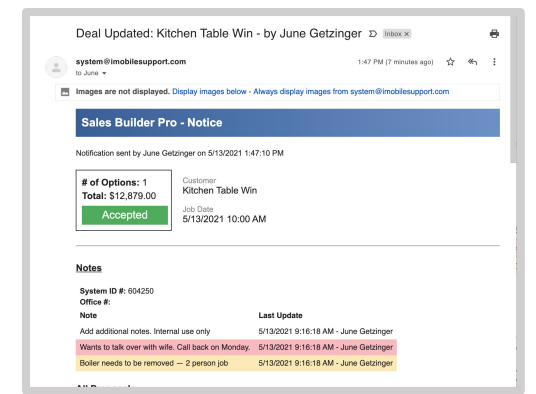
- Approve digital signature

- Notify Sales Rep Email

Subject Line: Deal Updated: Kitchen Table Win - by June Getzinger



Admin digital signature



SBP Notice Deal Updated

Advanced Deal Search

Deals

Kitchen

2 Days7 Days30 Days1 YearCustom

Advanced Search

Match

☐ Customer Name
☐ Customer #
☐ Job #
☐ Office #
☐ System ID #

Address

Line 1

Line 2

City

State

Zip

Phone

Home or Mobile

Email

Email

Deal Status

☐ Accepted
☐ Declined
☐ Pending
☐ WIP/Closed

Date Range Includes

☐ Job Date
☐ Proposal Date
☐ Form Date

Verification

Any

Acceptance

☐ ☐ ☐ ☐ ☐

Sales Rep

June Getzinger (juneahr@imobilesupport.com)

Company

Any

Customer Class

Any

Trade Type

Any

Reset

Search

Results

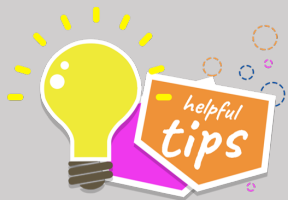
Export (.xlsx)

Company	Name	Address	Phone (H/M)	Date/Time/Status	Deal Status	Acceptance	Amount	Potential	Options	Sales Rep	Lead Source	Customer Class	Trade Type	Pres
Matts ME Deluxe Demo	Kitchen Table Win	31320 Solon Rd Solon, OH 44139	(888) 980-9119 Ext 701	05/13/2021 10:00 AM Complete	Pending			\$15,647.00		June Getzinger		Matts Tetra Basic	FW	1

1

Narrow the results with Advanced Filters

- Enter Customer Name, Customer #, Job#, Office #, System ID #, Address in text box
- Select date range
- Deal Status
- Sales Rep
- Select a deal



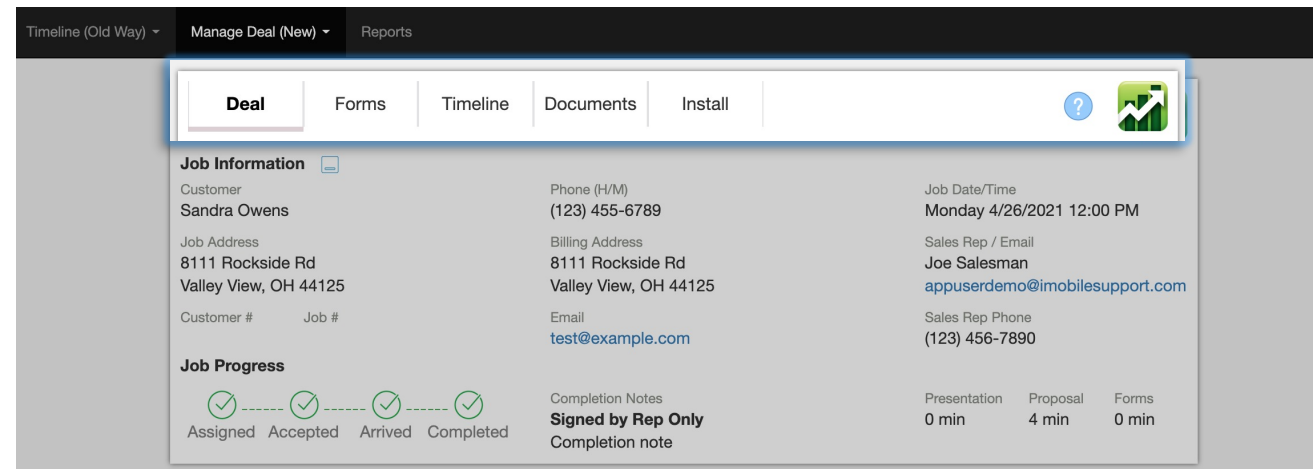
Sales Managers:

Use 2, 7, 30 Day filters to build list of "HOT", "WARM" and "COLD" deals; export the lists.

Note the \$ Potential of a deal

Improved Deal Management

- Improved layout to Deal Information
- Same information as the Timeline (Old Way)
- Manage Deal (New) organizes the information into Separate Tabs
- Job information at the top of each tab streamlines communication with your team and the customer



The screenshot shows the 'Manage Deal (New)' interface with a dark header bar containing 'Timeline (Old Way)', 'Manage Deal (New)', and 'Reports'. Below the header is a tabbed interface with 'Deal', 'Forms', 'Timeline', 'Documents', and 'Install'. The 'Deal' tab is active and displays the following information:

Job Information	
Customer Sandra Owens	Phone (H/M) (123) 455-6789
Job Address 8111 Rockside Rd Valley View, OH 44125	Billing Address 8111 Rockside Rd Valley View, OH 44125
Customer #	Job #
Email test@example.com	
Job Date/Time Monday 4/26/2021 12:00 PM	
Sales Rep / Email Joe Salesman appuserdemo@imobilesupport.com	
Sales Rep Phone (123) 456-7890	

Job Progress

Assigned Accepted Arrived Completed

Completion Notes
Signed by Rep Only
Completion note

Timeline


Activity	Duration
Presentation	0 min
Proposal	4 min
Forms	0 min



Use the email links to quickly communicate with customers and sales rep

Deal Management

Forms

 Download SBP forms associated with the deal.

Deal


Forms


Timeline

Documents

Install

?



Job Information 

Customer

Kitchen Table Win

Job Address

31320 Solon Rd
Solon, OH 44139

Customer #

Job #

Phone (H/M)

(888) 980-9119 Ext 701

Billing Address

31320 Solon Rd
Solon, OH 44139

Email

june@imobilesupport.com

Job Date/Time


Thursday 5/13/2021 10:00 AM

Sales Rep / Email


June Getzinger
juneahr@imobilesupport.com

Sales Rep Phone


Job Progress




Assigned



Accepted



Arrived



Completed

Completion Notes

Signed by Rep Only

Presentation

0 min

Proposal

22 min

Forms

0 min

Site Survey - Unitary v2.0



Created 5/13/2021 9:01:36 AM

Site Survey - Ductless v2.0



Created 5/13/2021 9:01:46 AM

Comfort Survey v2.0



Created 5/13/2021 9:01:57 AM

Deal Management

Timeline

New functionality:
Session drop-down allows
Managers to select specific
sessions.

Arrival to Completion
05/13/2021
✓ 05/14/2021



Deal

Forms

Timeline

Documents

Install

Job Information

Customer
Kitchen Table Win

Job Address
31320 Solon Rd
Solon, OH 44139

Customer # Job #

Phone (H/M)
(888) 980-9119 Ext 701

Billing Address
31320 Solon Rd
Solon, OH 44139

Email
june@imobilesupport.com

Job Date/Time
Thursday 5/13/2021 10:00 AM

Sales Rep / Email
June Getzinger
juneahr@imobilesupport.com

Sales Rep Phone

Job Progress

✓

✓

✓

✓

Assigned Accepted Arrived Completed

Completion Notes
Signed by Rep Only

Presentation Proposal Forms
0 min 24 min 0 min

Timeline

Session: 05/14/2021

Switch to Time Spent

Preparing Proposal										
Proposal: Customer										
Proposal: Option 1										
Proposal: Option 2										
Selected: Gold D95TC100...										
Proposal: Option 3										
Proposal: Summary										
Proposal: Accessory										

Deal Management

Deal Documents

Store all documents related to the deal in one place:

- AHRI certificates
- Warranties
- Financing Apps
- Customer acceptance docs
- Subcontractor estimates

DealFormsTimelineDocumentsInstall

Job Information

Customer

Sandra Owens

Job Address

8111 Rockside Rd
Valley View, OH 44125

Customer #

Job #

Phone (H/M)

(123) 455-6789

Billing Address

8111 Rockside Rd
Valley View, OH 44125

Email

test@example.com

Job Date/Time

Friday 4/23/2021 12:00 PM

Sales Rep / Email

Joe Salesman
appuserdemo@imobilesupport.com

Sales Rep Phone

(123) 456-7890

Job Progress

✓

✓

✓

✓

Assigned

Accepted

Arrived

Completed

Completion Notes

Signed by Rep Only

Presentation

0 min

Proposal

8 min

Forms

0 min

Documents

Submit Document

Description

Choose File

No file chosen

Submit

Document History

	Name	Description	Submitted	By	View
PDF	AHRI Certificate.pdf	AHRI Certificate	✗ 04/27/2021 1:17 PM	Susan Lakes	Download
PDF	Electrical Estimate 4-22-2021.pdf	Electrical Panel Subcontract	✗ 04/27/2021 1:17 PM	Susan Lakes	Download

Deal Management

DealFormsTimelineDocumentsInstall

Job Information

Customer

Sandra Owens

Job Address

8111 Rockside Rd
Valley View, OH 44125

Customer #

Job #

Phone (H/M)

(123) 455-6789

Billing Address

8111 Rockside Rd
Valley View, OH 44125

Email

test@example.com

Job Date/Time

Monday 4/26/2021 12:00 PM

Sales Rep / Email

Joe Salesman
appuserdemo@imobilesupport.com

Sales Rep Phone

(123) 456-7890

Job Progress

Assigned

Accepted

Arrived

Completed

Completion Notes

Signed by Rep Only

Presentation

0 min

Proposal

5 min

Forms

0 min

Install Notes

System ID #: 747

Office #:

of Options: 0

Total: \$0

Pending

Export

☐ Show Details

Proposal 4/26/2021 10:44:52 AM

Lennox Equipment

• XC21-036
• CBX32MV-036

\$18,300-0.6%

Lennox Equipment

• 13ACXN-036
• C33-36A-2

\$12,273-0.8%

Mitsubishi Electric Equipment

• MUZ-GL15NA-U1
• MSZ-GL15NA-U1

\$11,538+0.4%

Pending

Proposal Notes: [View](#)

Export Option: ☐ 1 ☒ 2 ☐ 3

Price Analysis: [Open](#)

Bill of Materials: [XLSX](#) [CSV](#)

Cost Analysis: [XLSX](#) [CSV](#)

Working Hours: [View](#)

Install Analysis: [View](#)

Proposal 4/26/2021 10:41:20 AM

Obsolete

Proposal 4/26/2021 10:30:16 AM

Obsolete


Install

Download:

- Bill of Materials
- Cost Analysis

View:

- Pricing Analysis
- Proposal Notes
- Working Hours
- Install Analysis

 intelligent
MOBILE SUPPORT