



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

The screenshot displays a mobile application interface titled "Sales Builder Pro" with a status bar at the top showing "10:51 AM Thu May 13" and "Not Charging". The main content area features the company logo "TETRA Heating and Cooling, Inc." and a "Kitchen Table Win" header. Below the logo, there are several content blocks: a "Why Choose Us?" section with a list of benefits (Trustworthy, High Quality, Professional, Affordable) next to an image of a family; a "Financing" section with an image of hands using a tablet; a "Product Videos & Images" section with an image of a house; a "Quality Installation" section with an image of a technician; a "Service & Maintenance" section with an image of hands holding a house icon; an "Air Quality" section with an image of a person opening a window; and a "Product Literature" section with an image of a family sitting on a sofa. The Mitsubishi Electric logo is visible in the top right of the content area. At the bottom, it says "Presented By: June Getzinger".

Kitchen Table Win

9:05 AM Thu May 13

Signature

Notes & Payment

Signatures

Acceptance (Customer)
Sign Clear
Remote

Approval (Company)
Sign Clear

Company Approval

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 Not Charging

Manage Deal

[Cancel](#) [Save](#)

Deal Notes # of Options: 0

System ID #: 604250 **Total: \$0**

Office #:

Pending

Unsaved Changes

+ 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 <p style="text-align: right;">\$15,647</p>	Deluxe Equipment <ul style="list-style-type: none">• Platinum DA2060• Deluxe DCF6021S <p style="text-align: right;">\$12,879</p>	Mitsubishi Electric Equipment <ul style="list-style-type: none">• MUZ-GL15NA-U1• MSZ-GL15NA-U1 <p style="text-align: right;">\$5,497</p>	<p>✖ Customer Accepted</p> <p>✔ Company Approved</p> <p>Accepted Pending</p> <p>Declined Obsolete</p> <p style="font-size: small;">June Getzinger 5/13/2021 9:02:06 AM</p>
--	---	---	--

Remote Customer Acceptance

Simple Search

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

The screenshot shows a mobile application interface for searching customer proposals. The top bar displays the time (11:30 AM) and date (Thu May 13). The search 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 containing "kitchen".
- Filters:** Three buttons for "2 Days" (selected), "7 Days", and "30 Days".
- Date Range:** "From: 5/12/21" and "To: 5/13/21" with calendar icons and red 'X' marks.
- Status:** Radio buttons for "Accepted", "Declined", and "Pending".
- Advanced:** A checkbox labeled "Advanced" is checked.
- Match:** Radio buttons for "Customer Name", "Customer #", "Job #", "Office #", and "System ID #".
- Address:** Input fields for "Address Line 1", "City", and "Zip".
- Job:** Radio buttons for "Yes", "No", and "Both". A "Install Scheduled" button with a green checkmark is visible.
- Proposals:** Radio buttons for "Show Obsolete" and "Show Deleted".
- Forms:** A radio button for "Show Deleted".
- Go:** A blue "Go" button at the bottom.

Results Panel:

- Customers:** A section titled "Customers" with the instruction "Select a customer to show results." A card for "Kitchen Table Win" (Customer #: 0, Pending) is highlighted.
- Proposals:** A list of proposals under the heading "Proposals":
 - "Kitchen Table Win" (Created: 5/13/21 9:02 AM, Pending)
 - "Site Survey - Unitary v2.0" (Created: 5/13/21 9:01 AM)
 - "Site Survey - Ductless v2.0" (Created: 5/13/21 9:01 AM)
 - "Comfort Survey v2.0" (Created: 5/13/21 9:01 AM)



Build Weekly To Do List

Date filter:

2 days: "HOT"

7 days: "WARM"

30 days: "COLD"

Remote Customer Acceptance

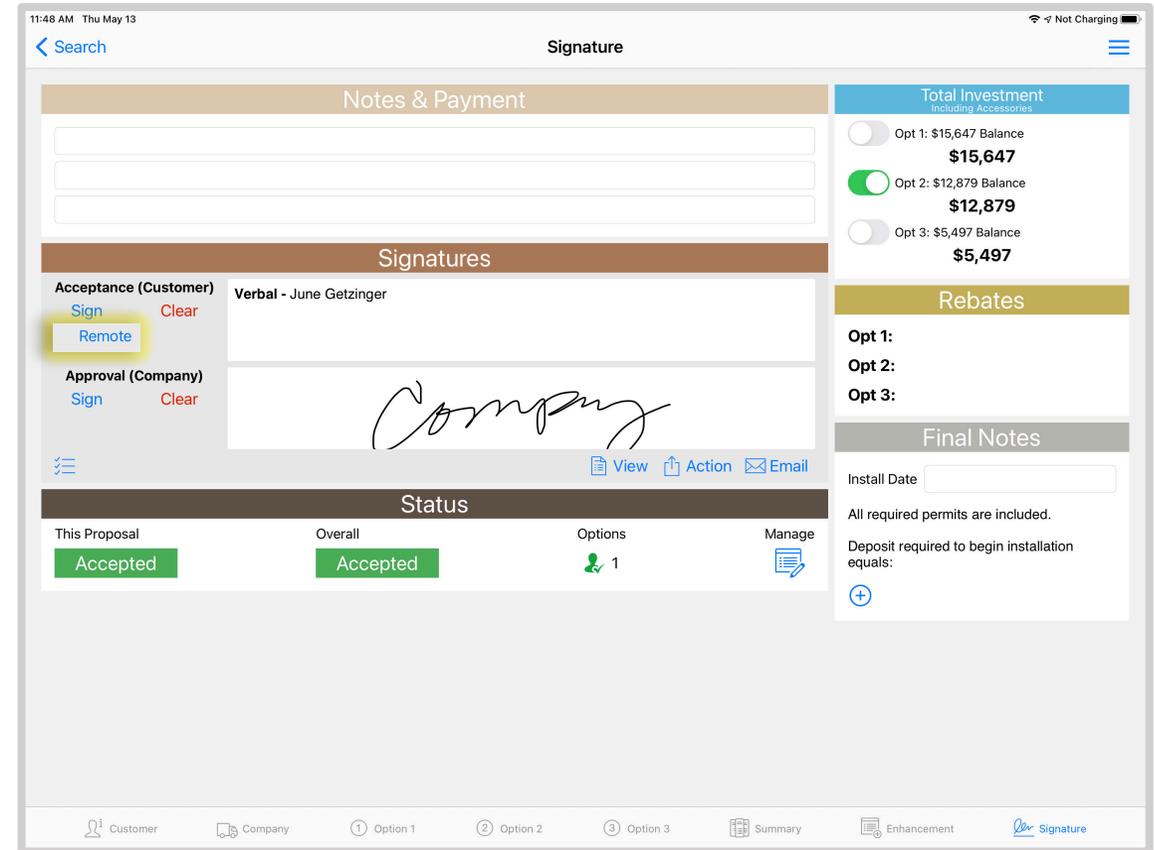
Remote Acceptance

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



Select mode of Acceptance:

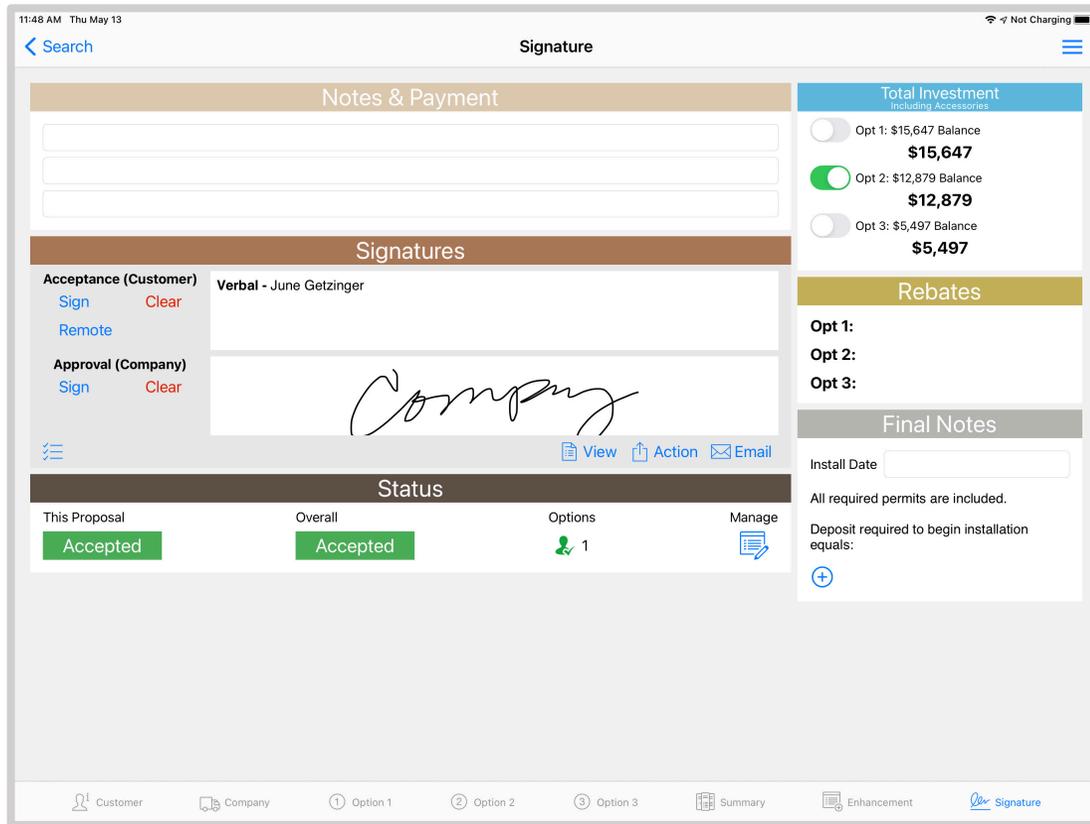
-  Signature on File
-  Email/Written
-  Verbal



The screenshot shows a mobile application interface for 'Signature' with the following sections:

- Notes & Payment:** Three empty text input fields.
- Signatures:** A section for 'Acceptance (Customer)' with 'Verbal - June Getzinger' and a 'Remote' button highlighted. Below it is 'Approval (Company)' with a handwritten signature.
- Total Investment:** A summary of three options: Opt 1 (\$15,647), Opt 2 (\$12,879), and Opt 3 (\$5,497).
- Rebates:** A section for 'Rebates' with three empty input fields for Opt 1, Opt 2, and Opt 3.
- Final Notes:** A section for 'Final Notes' with an 'Install Date' field and a note: 'All required permits are included. Deposit required to begin installation equals:'. A plus icon is at the bottom.
- Status:** A table showing 'This Proposal' and 'Overall' both as 'Accepted', 'Options' as '1', and a 'Manage' button.
- Bottom Navigation:** A bar with icons for Customer, Company, Option 1, Option 2, Option 3, Summary, Enhancement, and Signature.

Remote Customer Acceptance



- 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@imobilesupport.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

Install Scheduled

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

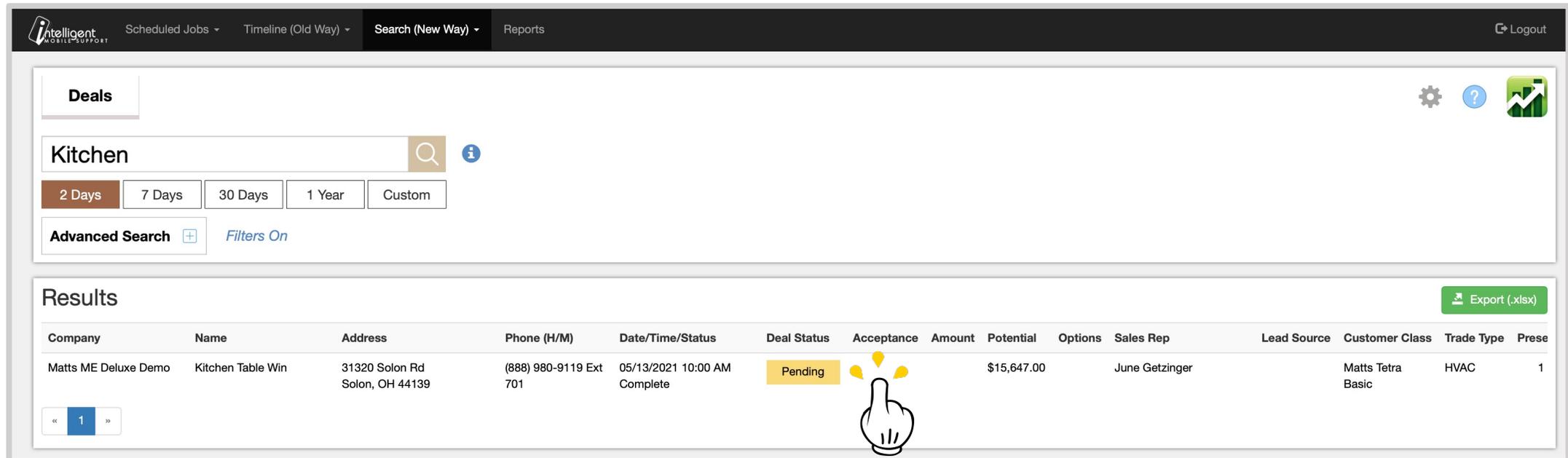
Created: 5/13/21 9:01 AM

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 application. The search criteria are set to 'Kitchen' with a 2-day filter. The results table contains one entry:

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

A hand icon with three yellow dots above it points to the 'Pending' status cell in the 'Deal Status' column.

Remote Win in the Office

- Select Option
- Select Customer Acceptance

 Signature on File

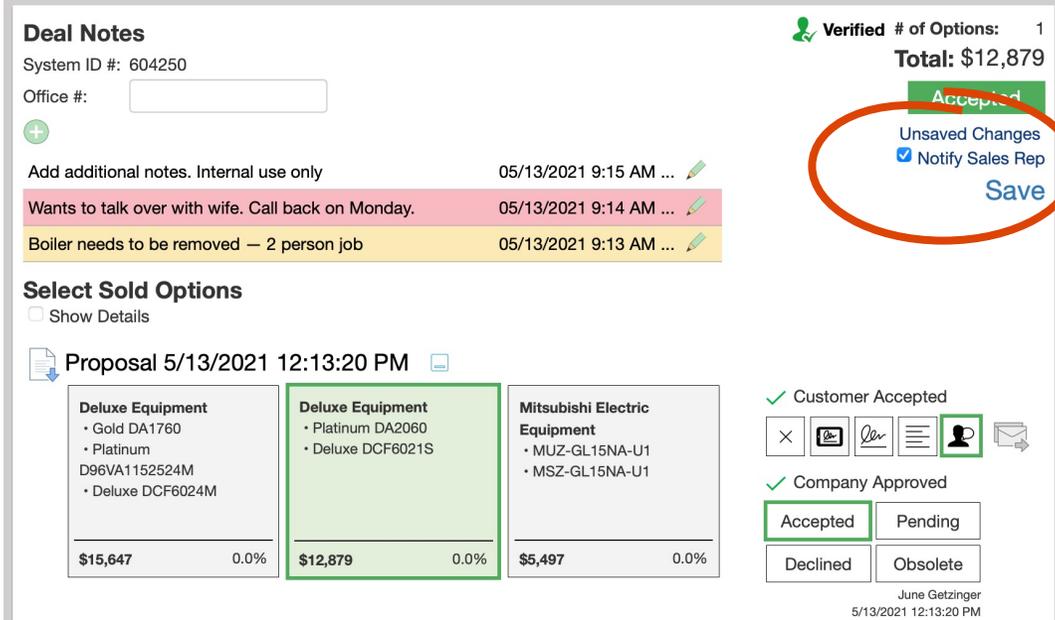
 Email/Written

 Verbal

- Enter Office #, Notes
- Save

- Approve digital signature
- Notify Sales Rep Email

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



Deal Notes
System ID #: 604250
Office #:

Verified # of Options: 1
Total: \$12,879

Accepted

Unsaved Changes
 Notify Sales Rep
Save

Add additional notes. Internal use only

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 ...

Select Sold Options
 Show Details

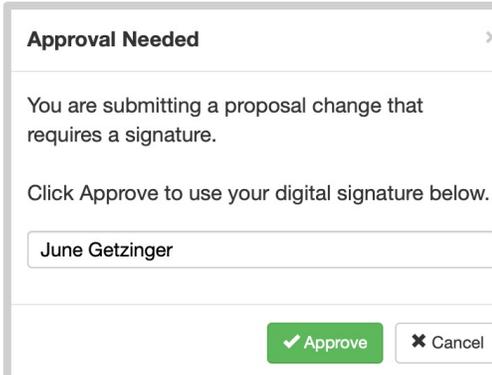
Proposal 5/13/2021 12:13:20 PM

Deluxe Equipment • Gold DA1760 • Platinum D96VA1152524M • Deluxe DCF6024M \$15,647 0.0%	Deluxe Equipment • Platinum DA2060 • Deluxe DCF6021S \$12,879 0.0%	Mitsubishi Electric Equipment • MUZ-GL15NA-U1 • MSZ-GL15NA-U1 \$5,497 0.0%
--	--	--

Customer Accepted
Company Approved

Accepted Pending
Declined Obsolete

June Getzinger
5/13/2021 12:13:20 PM



Approval Needed

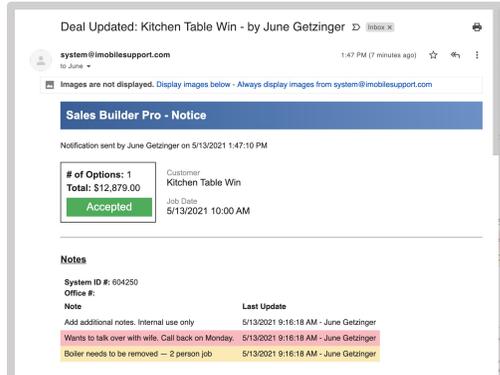
You are submitting a proposal change that requires a signature.

Click Approve to use your digital signature below.

June Getzinger

Approve Cancel

Admin digital signature



Deal Updated: Kitchen Table Win - by June Getzinger

system@imobilesupport.com
to June

Sales Builder Pro - Notice

Notification sent by June Getzinger on 5/13/2021 1:47:10 PM

of Options: 1
Total: \$12,879.00
Accepted

Customer: Kitchen Table Win
Job Date: 5/13/2021 10:00 AM

Notes

System ID #: 604250
Office #:

Note

Add additional notes. Internal use only

Wants to talk over with wife. Call back on Monday.	5/13/2021 9:16:18 AM - June Getzinger
Boiler needs to be removed — 2 person job	5/13/2021 9:16:18 AM - June Getzinger

SBP Notice Deal Updated

Advanced Deal Search

Deals

Kitchen

2 Days 7 Days 30 Days 1 Year Custom

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

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	HVAC	1

Export (.xlsx)

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 displays the 'Manage Deal (New)' interface. At the top, there are navigation tabs: 'Timeline (Old Way)', 'Manage Deal (New)', and 'Reports'. Below this is a sub-tabbed interface with 'Deal', 'Forms', 'Timeline', 'Documents', and 'Install'. The 'Deal' tab is active, showing 'Job Information' and 'Job Progress'. The 'Job Information' section includes fields for Customer (Sandra Owens), Phone (123) 455-6789, Job Date/Time (Monday 4/26/2021 12:00 PM), Job Address (8111 Rockside Rd, Valley View, OH 44125), Billing Address (8111 Rockside Rd, Valley View, OH 44125), Sales Rep / Email (Joe Salesman, appuserdemo@mobilesupport.com), and Sales Rep Phone (123) 456-7890. The 'Job Progress' section shows a sequence of steps: Assigned, Accepted, Arrived, and Completed, each with a green checkmark. Below this, there are 'Completion Notes' (Signed by Rep Only, Completion note) and a table with columns for 'Presentation', 'Proposal', and 'Forms', with values '0 min', '4 min', and '0 min' respectively.



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	Phone (H/M) (888) 980-9119 Ext 701	Job Date/Time Thursday 5/13/2021 10:00 AM
Job Address 31320 Solon Rd Solon, OH 44139	Billing Address 31320 Solon Rd Solon, OH 44139	Sales Rep / Email June Getzinger juneahr@imobilesupport.com
Customer # Job #	Email june@imobilesupport.com	Sales Rep Phone

Job Progress

Assigned Accepted Arrived Completed

Completion Notes
Signed by Rep Only

Presentation	Proposal	Forms
0 min	22 min	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.



Deal | **Forms** | **Timeline** | Documents | Install

Job Information

Customer: Kitchen Table Win
Job Address: 31320 Solon Rd, Solon, OH 44139
Customer #: [blank] Job #: [blank]

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: [blank]

Job Progress

Assigned ✓ Accepted ✓ Arrived ✓ Completed ✓

Completion Notes: Signed by Rep Only

Presentation: 0 min | Proposal: 24 min | Forms: 0 min

Timeline

Session: 05/14/2021

Switch to Time Spent

Activity	Start	End
Preparing Proposal	05/13/2021 10:00 AM	05/13/2021 10:00 AM
Proposal: Customer	05/13/2021 10:00 AM	05/13/2021 10:00 AM
Proposal: Option 1	05/13/2021 10:00 AM	05/13/2021 10:00 AM
Proposal: Option 2	05/13/2021 10:00 AM	05/13/2021 10:00 AM
Selected: Gold D95TC100...	05/13/2021 10:00 AM	05/13/2021 10:00 AM
Proposal: Option 3	05/13/2021 10:00 AM	05/13/2021 10:00 AM
Proposal: Summary	05/13/2021 10:00 AM	05/13/2021 10:00 AM
Proposal: Accessory	05/13/2021 10:00 AM	05/13/2021 10:00 AM

Deal Documents

Store all documents related to the deal in one place:

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

The screenshot displays a web interface for managing deal documents. It features a navigation bar with tabs for Deal, Forms, Timeline, Documents (active), and Install. The main content is divided into three sections: Job Information, Job Progress, and Documents.

Job Information

Customer Sandra Owens	Phone (H/M) (123) 455-6789	Job Date/Time Friday 4/23/2021 12:00 PM
Job Address 8111 Rockside Rd Valley View, OH 44125	Billing Address 8111 Rockside Rd Valley View, OH 44125	Sales Rep / Email Joe Salesman appuserdemo@imobilesupport.com
Customer #	Job #	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
AHRI Certificate.pdf	AHRI Certificate	04/27/2021 1:17 PM	Susan Lakes	
Electrical Estimate 4-22-2021.pdf	Electrical Panel Subcontract	04/27/2021 1:17 PM	Susan Lakes	

Deal Management



Deal | Forms | Timeline | Documents | **Install** ?

Job Information

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

Job Progress

Assigned Accepted Arrived Completed

Completion Notes
Signed by Rep Only

Presentation	Proposal	Forms
0 min	5 min	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 <hr/> \$18,300 -0.6%	Lennox Equipment • 13ACXN-036 • C33-36A-2 <hr/> \$12,273 -0.8%	Mitsubishi Electric Equipment • MUZ-GL15NA-U1 • MSZ-GL15NA-U1 <hr/> \$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