

Viewing Your Setup Status Using the Management Portal

The Management Portal makes it easy to **view the Setup Status** of your Sales Builder Pro build at a glance.



Setup Status

Click **View** to see status

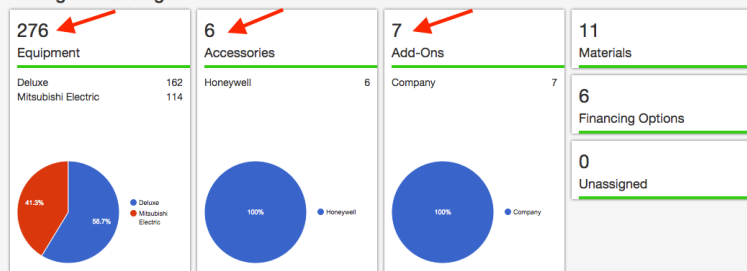


View

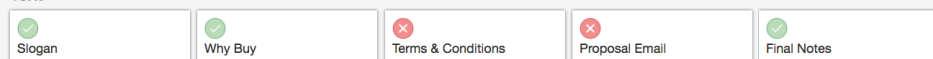
To access your **Setup Status**, click on the blue **Manage** button in the Setup Status section of the Management Portal.

This view will show you, at a glance, the completion status of each section of the app, along with a breakdown of your equipment brands and totals.

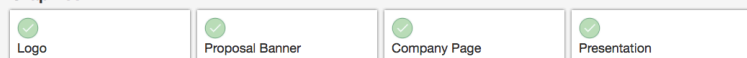
Pricing & Financing



Text



Graphics



In the example, you can see that there are 276 total pieces of equipment, and below that, you can see that 162 pieces are Deluxe brand, and 114 are Mitsubishi Electric.

A standard Sales Builder Pro build includes 500 pieces of unitary equipment, 50 accessories, 50 add-ons, and 50 materials, so the Setup Status is an easy way to check how close you are to those limits.

You'll also notice in this example that the Terms and Conditions and Proposal Email are missing from the build, so they appear with a red X instead of a green check mark. As we are getting ready to launch your app, your Customer Success Specialist will review this page with you to make sure everything has been added.

Setup Status FAQ

My Terms and Conditions, Why Buys, and Slogan are all marked as complete, but I haven't submitted those to my Customer Success Specialist yet. Where is that content from?

In order to accelerate onboarding, IMS has developed standard universal content for most of the text fields in the app. If you have a specific slogan or branding you'd like to add, just let us know and we can switch those out for you.

I still have questions about my setup status!

No problem! Please feel free to contact your Customer Success Specialist by email, and we'd be glad to take a look at your build with you.