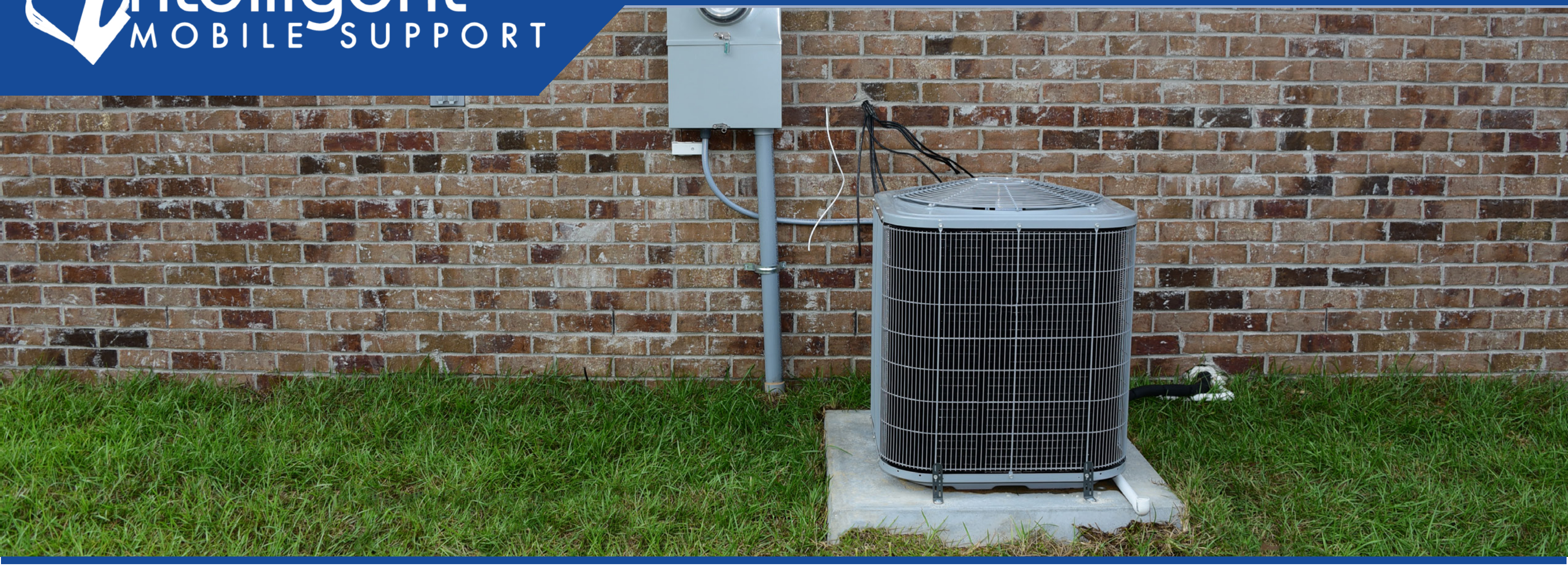
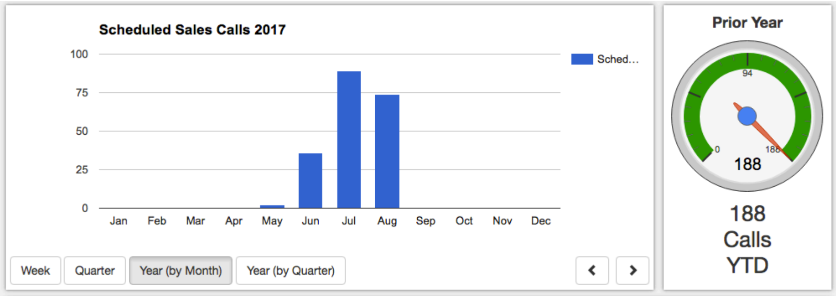


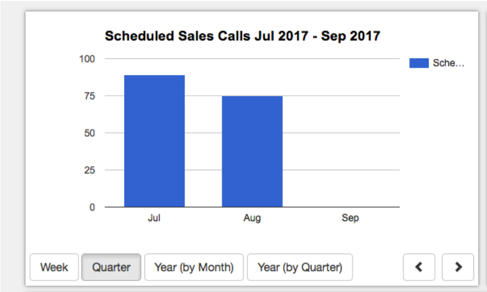
Accessing Sales Management Tools Using the Management Portal

The management portal makes it easy to **access** your **Sales Management Tools** in Sales Builder Pro.

To view the Sales Management Tools, click the blue **Users** button in the Sales Management Tools section of the Management portal.



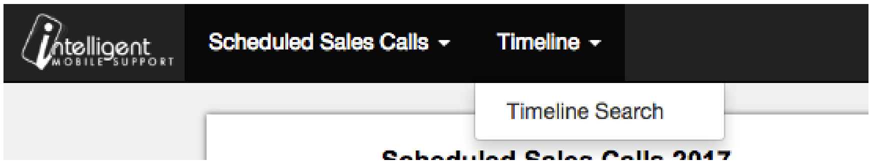
The first screen you will see is a graph showing Scheduled Sales Calls per month in the current year, with a breakdown by Sales Rep below.



You can also toggle this view by clicking the Week, Quarter, Year (by Month), or Year (by Quarter) buttons.

To view all of your proposals in a certain timeframe, select **Timeline Search** from the top navigation bar under **Timeline**.

You can search by Sales Rep, Customer Number, Customer Name, and Date Range. The fewer fields you fill out, and the wider you make the date range, the more results you'll get when you click **Search Jobs**.

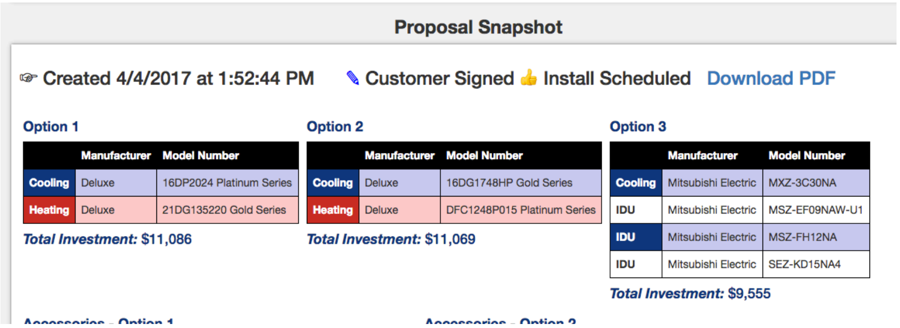


Sales Builder Pro Portal: **Sales Management Tools**

On each line item, there will be Status, Signed, Install, Presentation and Proposal columns in addition to the fields in the search box.

Job Date/Time	Customer #	Customer Name	Assigned Rep	Status	Signed	Install	Presentation	Proposal
4/4/2017 12:00 PM	0	Joe and Susan Homeowner	Mitsubishi Electric Tetra Basic Admin	Complete	✎	👍	59 min	67 min

- The **Status** column indicates the status of the job in the app.
- The **Signed** column indicates whether the customer has signed. The pencil icon will appear if the customer's signature is present on the proposal.
- The **Install** column indicates whether an install date has been scheduled in the app. The thumbs up icon will appear if the install date field has been completed on the proposal.
- The **Presentation** column indicates how long the Sale Representative spent showing the Sales Presentation to the customer.
- The **Proposal** column indicates how long the Sales Representative spent building the proposal.


Proposal Snapshot

Created 4/4/2017 at 1:52:44 PM ✎ Customer Signed 👍 Install Scheduled Download PDF

Option 1

	Manufacturer	Model Number
Cooling	Deluxe	16DP2024 Platinum Series
Heating	Deluxe	21DG135220 Gold Series

Total Investment: $11,086

Option 2

	Manufacturer	Model Number
Cooling	Deluxe	16DG1748HP Gold Series
Heating	Deluxe	DFC1248P015 Platinum Series

Total Investment: $11,069

Option 3

	Manufacturer	Model Number
Cooling	Mitsubishi Electric	MXZ-3C30NA
IDU	Mitsubishi Electric	MSZ-EF09NAW-U1
IDU	Mitsubishi Electric	MSZ-FH12NA
IDU	Mitsubishi Electric	SEZ-KD15NA4

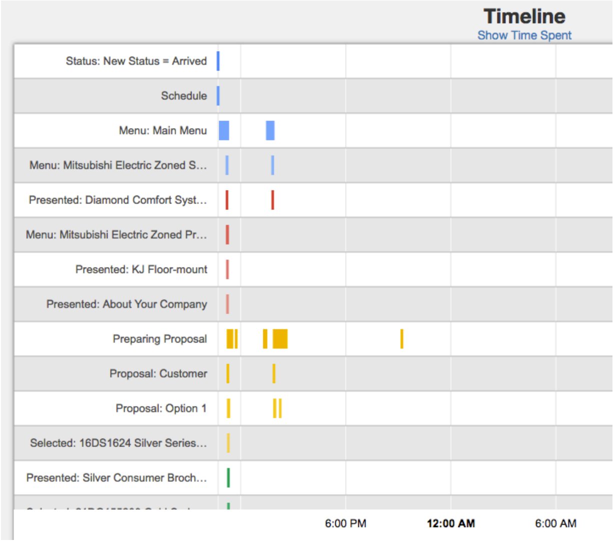
Total Investment: $9,555

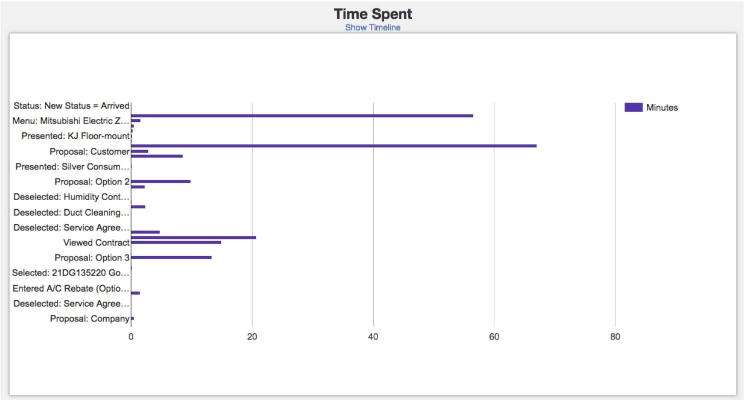
You can view the job details by clicking any of the blue links in the line item of the search results.

For each proposal that was created for the customer, you can view the equipment that was quoted and download a PDF of the proposal.

You can also see the breakdown of where the Sales Representative spent his or her time in the proposal.

By clicking the **Show Time Spent** link, you can toggle between the Timeline view and the Time Spent view.

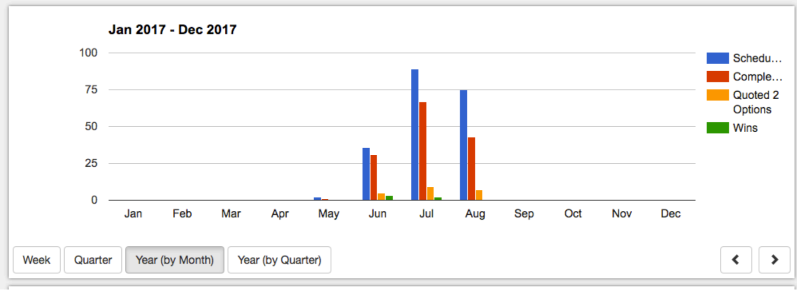




Under the **Scheduled Sales Calls** menu in the top navigation bar, you can **Build a Chart**, **Build a Table**, view your **Sales Funnel**, and **Compare Users**.

To **build a chart**, you can select the columns you would like to appear by clicking **Select Columns**, and then marking each column with a checkbox and clicking OK.

Your chart will update with bars for each column you selected.

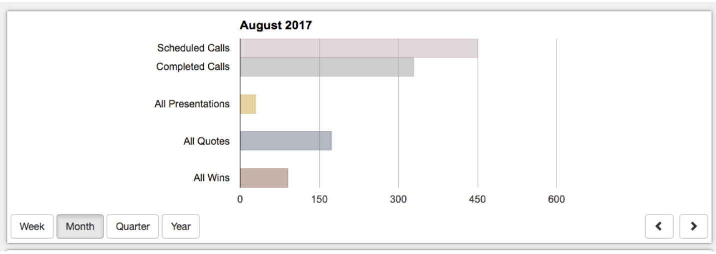


	A	B	C	D	E
1	**Build a Chart**				
2					
3	**Sales Rep**	**Scheduled Calls**	**Completed Calls**	**Quoted 2 Options**	**Wins**
4	Sales Rep 1	0	0	0	0
5	Sales Rep 2	66	36	5	1
6	Sales Rep 3	0	0	0	0
7	Sales Rep 4	1	0	0	0
8	Sales Rep 5	8	4	1	0
9	Sales Rep 6	63	45	6	0
10	Sales Rep 7	10	8	0	2
11	Sales Rep 8	52	47	8	1
12					
13	Build a Chart				
14	Created By Intelligent Mobile Support, Inc.				
15	Generated By Gina 8/15/2017 11:07 AM				
16	From 1/1/2017				
17	To 12/31/2017				

You can export this view to Excel by clicking the green Export button.

The **Build a Table** function works similarly except that it doesn't display the graph, and it also includes an Average row for all the sales reps.

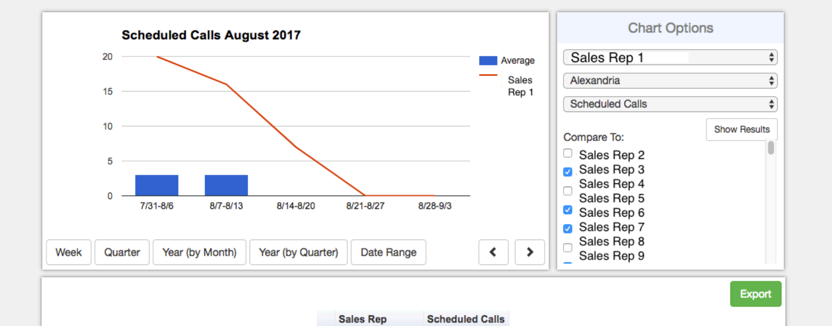
Sales Rep 8	52	47	8	1
Average	25	18	2	0
Build a Table				
Created By Intelligent Mobile Support, Inc.				
Generated By Gina 8/15/2017 11:11 AM				
From 1/1/2017				
To 12/31/2017				



The **Sales Funnel** shows your total number of scheduled calls by month (although you can toggle to show by week, quarter, or year as well), how many have been completed to date, how many have included the Sales Presentation, how many quotes were generated, and how many were classified as Wins.

As with the other views, you can view the Sales Rep level detail below the graph and export to Excel.

The **Compare Users** view allows you to compare one user to another, or to the average of multiple users, and you can pick the criteria to compare them.



Sales Management Tools FAQ

I still have questions about using the Sales Management Tools!

No problem! Please feel free to contact your Customer Success Specialist by email, and we'd be glad to walk you through the process.