Intelli	Itelligent Mobile Support, Inc.Sales Builder Pro – iPad Cheat SheetPage			
	Icon / View	Action	Notes	
1		Touch the <b>Sales Builder Pro</b> icon	To get the app, from your iPad, search the app store for <i>"Sales</i> <i>Builder"</i> and touch install	
2	\$ 91% •••	Touch the <b>Navigation</b> menu icon	Located in the upper right-hand corner	
3	Quick Proposal	Select Quick Proposal Note: If your sales calls (jobs) are scheduled for you, tap View Schedule to view Customers	<b>Hint:</b> Your company logo is a short cut to your schedule page	
4	Cancel Quick Proposal Continue Customer Customer #: Name:	On the Quick Proposal popup: • Touch <b>Name</b> • Touch <b>Continue</b>	<ul> <li>Customer Class and Trade Type should default to the correct values</li> <li>Customer #, Lead Source, and Job # are optional</li> </ul>	
5	2 state the set of t	Fill in all necessary <b>Customer</b> info	Hint: Use commas to separate more than one Email address	
6	iPad 🗢 K	<ul> <li>Touch Back to get to Home</li> <li>&lt; Back is located in the upper left-hand corner</li> </ul>	<ul> <li>You may also use the Navigation menu to go to the Home screen</li> </ul>	
7		<ul> <li>Use the Home screen to make your sales presentation</li> <li>Touch buttons (or tiles) to open various Attachments (e.g., videos, PDFs, and pictures)</li> </ul>	<ul> <li>Focus on what sets you apart from your competition – your differentiators.</li> <li>Answer the question <i>"Why</i> <i>Buy"</i> from you – what unique value do you offer?</li> </ul>	
8	* 975	From the <b>Home</b> view	Touch the Customer Name	
9	() Option 1 (2) Option 2 (3) Option 3	From the bottom navigation bar	Select <b>Option 1, 2 or 3</b> to build an equipment proposal option	
10	Cooling         Debis         Option           Type         Air Conditioner         Image: Conditioner         Image: Conditioner           Manufacturer         Deluxe         Image: Conditioner         Image: Conditioner           Model         160001736 Gold Series         Image: Conditioner         Image: Conditioner           Tons         3         Warranty         Parts         10 Year           SEER [EER   HsPF         17         Lacor         3 Year           Coll (IU)         CHNC4221000         Compressor         20 Year	<ul> <li>Add Cooling components</li> <li>Touch <u>Type</u>, <u>Manufacturer</u>, <u>Model</u>, and <u>Coil</u> to open drop down pick lists</li> </ul>	<ul> <li>Specs, Warranty Information, and a brochure thumbnail appear</li> <li>Touch the thumbnail to open the brochure</li> </ul>	
11	Heating Tyge Gas Funace Manufacturer Delue Manufacturer Delue Manufacturer Delue Manufacturer Delue Manufacturer Delue BTUs BTUs BTUs BTUs BTUs BTUS BTUS Prostor Copadry Heat Exchanger Liferon Liferon Delue Manufacturer Manufa	<ul> <li>Add Heating components</li> <li>Touch <u>Type</u>, <u>Manufacturer</u>, <u>Model</u>, and <u>Electric Heat</u> to open drop down pick lists</li> </ul>	<ul> <li>Specs, Warranty Information, and a brochure thumbnail appear</li> <li>Touch the thumbnail to open the brochure</li> </ul>	

Intelli	ntelligent Mobile Support, Inc. Sales Builder Pro – iPad Cheat Sheet Page 2 of 2				
12	More	in the <b>More</b> area	Add Notes and an AHRI number		
	AHRI 123456789				
13	CoolingTotal Product DiscountSuggested Retail Price\$8,429Finance Price with Discount\$8,429Cash Price with Discount\$8,429Cash Price with Discount\$8,429Total Product Discount\$6,742Suggested Retail Price\$6,742Finance Price with Discount\$6,742Cash Price with Discount\$6,742Cash Price with Discount\$15,171Down Payment\$15,171Remaining Balance\$15,171	Adjust <b>Total Investment</b> (price) using the hidden controls (no underlines)	<ul> <li>Total Product Discount adds a visible discount like a service credit – this is shown on the proposal</li> <li>Suggested Retail Price adds a hidden price change (+/-) to adjust for job difficulty – this is NOT shown on the proposal</li> <li>Down Payment adds a down payment – this is shown on the proposal</li> </ul>		
14	Cash Price Finance Price 3 year NO INTEREST (expires April 15, 2018) 5 year Green Sky 85 month (expires on Nov 15) ServiceFinance Synchrony 85 months 4 year Syncrony 6209 \$173.71 / mon	Touch <b>Cash Price / Finance</b> <b>Price</b> switch to toggle between these choices	The selected <b>Finance Program</b> is marked with a green checkmark		
15	Summary	From the bottom navigation bar	Select <b>Summary</b> to view a side- by-side comparison of all 3 options		
16	Enhancement	From the bottom navigation bar	Select <b>Enhancement</b> to view <b>Accessory, Add On</b> (Additional Services), and <b>Materials</b>		
17	Addressory Add-On Moterial Optional Accord Head Sector Resources and the Address and address and the Address and	Accessory tab (The Add On tab works the same)	<ul> <li>Touch the scroll box to popup a menu of available accessories or additional services</li> <li>Tip: Use Miscellaneous to add something at the point of sale and the Management Portal to update your price book</li> </ul>		
18	Option         Price           Outdoor Pad for AC or Heat Pump         0           Line Set up to 25 ft         0           Line Set up to 25 ftet         14           Line Set above 25 feet         ft: 40           Outdoor electrical disconnect box         0           Cable (whip) to connect the outdoor unit         0	<b>Materials</b> tab	<ul> <li>Select Materials for each of the 3 options</li> <li>Use green circles to indicate which materials belong to which options</li> </ul>		
20	Image: Signatures     Signatures       Image: Signatures     Image: Signatures       Image: Signatures     Ima	<ul> <li>Signature tab</li> <li>Add free form notes in Notes &amp; Payment area</li> <li>Select one or more options in Total Investment area</li> <li>Select one or more options in Total Investment area</li> <li>Add <u>mail-in</u> Rebates here</li> <li>Add "instant rebates" in Product Discount as those are subtracted from the price</li> <li>If known, add an Install Date using the date spinner</li> <li>Add Final Notes using +</li> <li>Approve by touching Sign</li> <li>View or Email (you must touch email to send)</li> <li>Use Action to print and for other iPad actions</li> </ul>			