



Sales Builder Pro App Checklist

RECOMMENDED SEQUENCE

CHECKLIST		
<input type="checkbox"/>	Major distributor price book	Submit to Implementation Specialist
<input type="checkbox"/>	Learn how to use the app	Learn How to Use the App Video Series
<input type="checkbox"/>	Learn how to manage the app	Learn How to Manage the App Video Series
<input type="checkbox"/>	Learn how to use the pricing engine	Pricing Video
<input type="checkbox"/>	Financing programs	Submit to documents in the portal
<input type="checkbox"/>	Minor brand accessories	Submit to documents in the portal
<input type="checkbox"/>	Additional services	Submit to documents in the portal
<input type="checkbox"/>	Terms and Conditions	Submit to documents in the portal
<i>CSS will contact you after loading the major price book</i>		
<input type="checkbox"/>	Schedule a 1:1 pricing call	Contact Customer Success Specialist
<input type="checkbox"/>	Customize the proposal bullet points and the customer email body	Submit to documents in the portal
<input type="checkbox"/>	Sales team training – Learn how to use the app	Learn How to Use the App Video Series