Intelligent N	Nobile S	Support,	Inc.
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Sales Builder Pro – iPad Cheat Sheet

lincem			1 age 1 61 5
	Icon / View	Action	Notes
1	* 91%	Touch the Navigation	Located in the
		menu icon	upper right-hand
			corner
2		Select Quick Proposal	Hint: Your company
		Note: If your sales calls	logo is a short cut to
	Quick Proposal	(jobs) are scheduled for	your schedule page
		you, tap View Schedule to	
		view Customers	
3	Court Solid Report Commu	On the Quick Proposal	Customer #, Lead
	Customer Galarier #	popup:	Source, and Job #
	Notice Internet Regulard Contenter Com Article Storem	<ul> <li>Name (required)</li> </ul>	are optional
	AMS Source Cardo	• Touch <b>Continue</b>	
	Lead house		
	Jub Info		
4		Customer Tab:	Hint: Use commas to
	Cast Cast Cast	Fill in all necessary	separate more than one
	Contrave R: 0 20232009 New Contrave Name New Katalay Contrave 2010 Contrave 2010	Customer info Info	Email address
	Ernak Bourne 330 Address Ellerg Address Erne an Jaholinens ()	entered here will	
	Un 2         Un 2           Un 2         Un 2           Oy         Oy           Wate         Date           Base         Zar	autofill in the customer	
	Additional Contacts Tains Chail Additions	autom in the customer	
	Terrer Constantino	quote.	
5		From the bottom	
	L <sup>1</sup> Customer CB Company ① Option 1 ② Option 2 ③ Option 3	navigation bar	
	1	<ul> <li>Select Option 1</li> </ul>	
6	10.00 (5.00)	Add Cooling	Specs, Warranty
	Clask	components	Information, and a
	Cooling Ar Conditioner	• Touch <b>Type</b> .	brochure thumbnail
	Manufacturer Goodman Model 14 SEER-3T-GSC140361	Manufacturer.	appear
	BTUe 34,200 Werkery SEER   EER   HSPF 14 11.5 Lake Attraction 15 Traction 16 T	Model, and Coil to	• Touch the
	Cal.II.0. Coversion (FFDF-175 In- CAPF313786	open drop down	thumbhail to open
		nick lists	
		pick lists	the brochure
7		Add Heating	<ul> <li>Snecs Warranty</li> </ul>
	In a contrast         If a contrast         If a contrast         If a contrast           VMEI         320488304         If a contrast         If a contrast	components	- Spees, wairancy
	yeres Partie		
	Decit best Costory	<ul> <li>Touch <u>Type</u>,</li> <li>Manufacturar</li> </ul>	prochure thumbhail
	Yu/lit         dar         para provide         rupper           BU/lit         01000         Value         0.000           OVERSDOCIONE         Value         0.000	<u>Ivianutacturer</u> , Model and Electric	appear
	Veronie podru protokowej Stari de obrani za rezistania Veronie za stari de obrani za stari Veroni za stari de obrani za stari Veroni za stari de obrani za stari	ivioaei, ana <u>Electric</u>	Touch the
	anna ant	Heat to open drop	thumbnail to open
		down pick lists	the brochure
8	Heating Oteam 0	Adjust Overall Job	<ul> <li>Labor and Install</li> </ul>
	Joge Gas Furnace Manufacturer Deluxe	Costs, Labor and Install	Material
	Model         Shree D95PA661317M         Warranty           BTUs         60,000         Parts         30 Year	Materials – Touch	adjustments
	AFUE 95% Labor 1 War Bochic Hoat Hear Exchanger 20 War	Install	available to IMP
	Capachy		users only
	More Notes		,
	AHR		
9		In the <b>More</b> area	Add Notes for the
	More	AHRI number	option
	Notes My personal recommendation AHRI 123456789	populates on the	
		System tah	
		System lab	

Intellig	gent Mobile Support, Inc. Sales Builder Pro	– iPad Cheat Sheet	Page 2 of 3
10	Image: Control of the set of the se	<ul> <li>Pricing</li> <li>System price will display after all components have been selected.</li> <li>Tap Total Product Discount to apply a discount.</li> <li>Select Enhancements tab from the bottom navigation bar</li> <li>Accessory &amp; Add-On tab</li> <li>Touch the scroll box</li> </ul>	<ul> <li>Discounts will appear on the Customer Proposal when the option is selected.</li> <li>Tip: Use Miscellaneous to add something at the point of sale</li> </ul>
	So Mandamana Co	to popup a menu of available accessories or service items	
13	Value websy:     Websystem       Contrion Foldes:     Contrion Foldes:       Prevade for your safety:     Prevade for your safety:       Now     Prevade for the Prevad	<ul> <li>Notes Tab</li> <li>Add free form notes in Notes &amp; Payment area</li> <li>Add an Requested Install Date using the date spinner</li> <li>Add Final Notes using "+"</li> </ul>	
14	I de la marté la marté de la m	<ul><li>Signature Tab</li><li>Select Option</li><li>Tap Customize</li></ul>	
15	Not me sociaji     Customice Preposal       Codion 1     Option 2       Name     Name       Decoription     Decoription       Decoription     Decoription       Settings     Table & Fields       Option 1:     Settings       Decoription     Decoription	<ul> <li>Customize Proposal</li> <li>Customize the Proposal Name, Option name and description</li> <li>Show/Hide Line Item Pricing</li> </ul>	• <b>Tip:</b> Turn Off Show Line Item Pricing to display system price on the customer quote.
16	Significantics         Southing           Analyzine (Stations)         Implicant           Significant         Southing           Approximation         Southing	<ul> <li>Tap Sign: add Company Approve Signature</li> <li>View Quote</li> <li>Email to customer</li> </ul>	• <b>Tip:</b> Company approval locks the values down in the quote
17	Non to all     Conserve: Valuation (VEXER & 23 m) re     4 minute       Arrangenet Arrangenet None Regarded Conserve:     None Regarded Reset Constraint     None Regarded Reset Constraint     None Regarded Reset Constraint     None Regarded Reset Constraint     None Regarded Reset Constraint       None Regarded Constraint     None Regarded Reset Constraint     None Regarded Reset Constraint     None Regarded Reset R	Navigation Menu > View Schedule • Tap Completed • Select Completion Code • Tap Submit	<ul> <li>Back Office email is sent when the job is completed.</li> <li>Back Office email will be sent for every revision made to the quote at future dates</li> </ul>