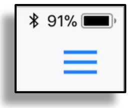
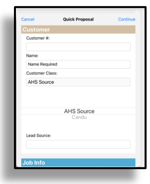
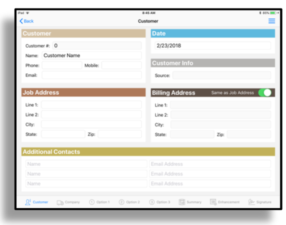
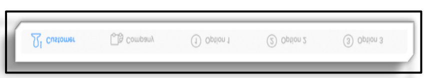
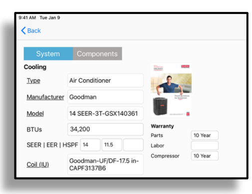
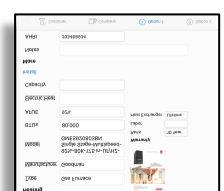
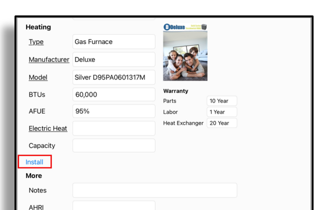
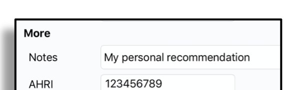
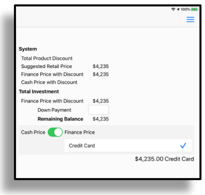
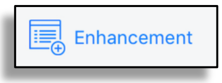
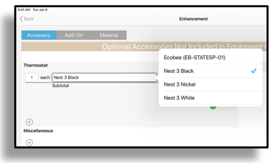
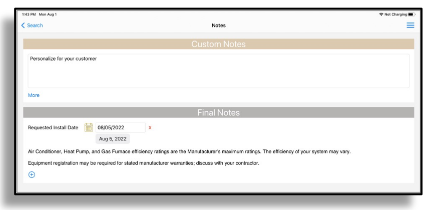
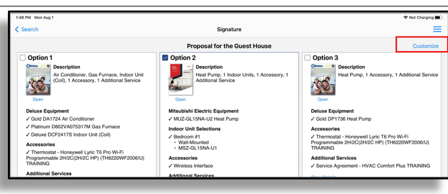
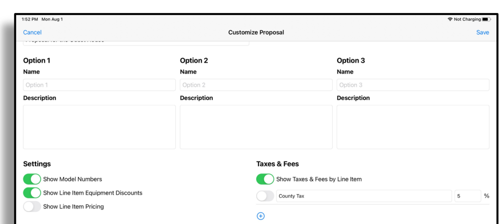
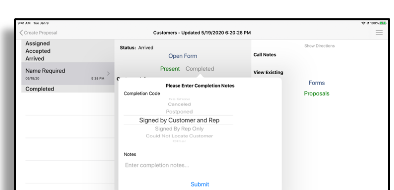
	Icon / View	Action	Notes
1		Touch the **Navigation** menu icon	• Located in the upper right-hand corner
2		Select **Quick Proposal** Note: If your sales calls (jobs) are scheduled for you, tap **View Schedule** to view **Customers**	**Hint:** Your company logo is a short cut to your schedule page
3		On the Quick Proposal popup: • **Name (required)** • Touch **Continue**	• **Customer #, Lead Source**, and **Job #** are optional
4		**Customer Tab:** Fill in all necessary **Customer** info. Info entered here will autofill in the customer quote.	**Hint:** Use commas to separate more than one Email address
5		• From the bottom navigation bar • Select Option 1	
6		Add **Cooling** components • Touch **Type**, **Manufacturer**, **Model**, and **Coil** to open drop down pick lists	• Specs, Warranty Information, and a brochure thumbnail appear • Touch the thumbnail to open the brochure
7		Add **Heating** components • Touch **Type**, **Manufacturer**, **Model**, and **Electric Heat** to open drop down pick lists	• Specs, Warranty Information, and a brochure thumbnail appear • Touch the thumbnail to open the brochure
8		Adjust Overall Job Costs, Labor and Install Materials – Touch Install	• Labor and Install Material adjustments available to IMP users only
9		In the **More** area • AHRI number populates on the System tab	• Add Notes for the option

10		Pricing • System price will display after all components have been selected. • Tap Total Product Discount to apply a discount.	• Discounts will appear on the Customer Proposal when the option is selected.
11		**Select Enhancements tab** from the bottom navigation bar	
12		**Accessory** & **Add-On tab** • Touch the scroll box to popup a menu of available accessories or service items	**Tip:** Use **Miscellaneous** to add something at the point of sale
13		**Notes Tab** • Add free form notes in **Notes & Payment** area • Add an **Requested Install Date** using the date spinner • Add **Final Notes** using **"+"**	
14		**Signature Tab** • Select Option • Tap Customize	
15		**Customize Proposal** • Customize the Proposal Name, Option name and description • Show/Hide Line Item Pricing	• **Tip:** Turn Off Show Line Item Pricing to display system price on the customer quote.
16		• **Tap Sign: add Company Approve Signature** • **View Quote** • **Email** to customer	• **Tip:** Company approval locks the values down in the quote
17		**Navigation Menu > View Schedule** • **Tap Completed** • Select **Completion Code** • Tap **Submit**	• Back Office email is sent when the job is completed. • Back Office email will be sent for every revision made to the quote at future dates