



Management Portal

*Customize and Manage
Sales Builder Pro*

Training Workshop Sequence

Boot Camp

Quote equipment

- Cash Price, Down Payment
- Add a Discount and Rebate
- Add a Finance Program & Accessory (Dealer Fee “boost” and Payment Factor)
- Add an Install Date and special note

Portal Training

Manage the App

- Equipment
 - Export, edit
- Manage
 - Cash Price
 - Accessories
 - Add-Ons
 - Materials
 - Financing
 - “Boost”
 - Final Notes
 - Presentation

Pricing Engine

Pricing

- Calculated Price
- Tax
- Pricing Method
- Installation Kit
- Labor Costs
- Manage Margin
- Pricing Walk

Certified SBP

Certified User

- Schedule Management
- Sales Presentation
- Good Better Best
- 3 Ways to adjust for job complexity
- Ductless Quote

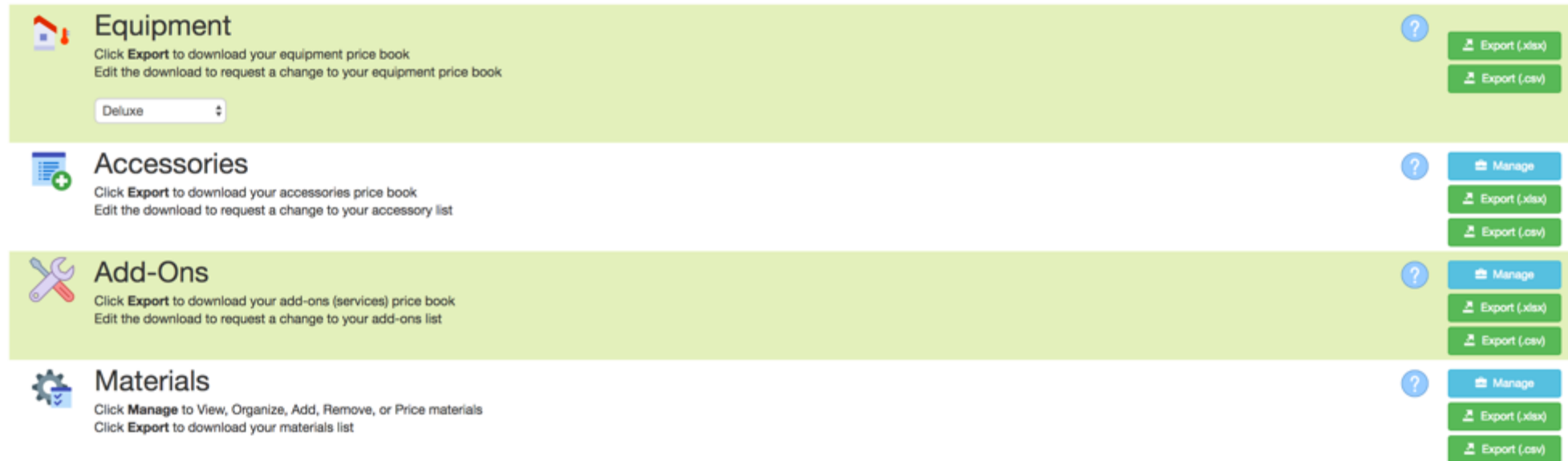
Management Portal

1. Export and edit the **Equipment**, Accessory, Add-Ons
2. Manage **Accessories** – add new, remove, edit pricing
3. Manage **Add-Ons** – add new, remove, edit pricing
4. Manage **Materials** – add new, remove, edit pricing
5. Manage **Financing Programs** – add new, remove, edit programs
6. Manage **Final Notes** – add new, remove, edit
7. Manage the **Sales Presentation** attachments – remove, add new attachments



Equipment


- Scroll to the Equipment Section
- Select Export to download an excel spreadsheet (.xlsx)
- If you do not have an excel compatible spreadsheet program export the worksheet as a .csv.
- Only need to see equipment associated with one OEM? Use the Select OEM dropdown to select a brand and then Export the excel sheet.



The screenshot displays a mobile application interface with four main sections, each highlighted in a light green background. Each section includes a title, a brief instruction, a dropdown menu, and a set of action buttons.

- Equipment:** Includes a home icon, a title "Equipment", instructions to click "Export" for a price book and to edit for changes, a dropdown menu currently set to "Deluxe", and buttons for "Export (.xlsx)" and "Export (.csv)".
- Accessories:** Includes a list icon with a plus sign, a title "Accessories", instructions to click "Export" for a price book and to edit for changes, and buttons for "Manage", "Export (.xlsx)", and "Export (.csv)".
- Add-Ons:** Includes a wrench and screwdriver icon, a title "Add-Ons", instructions to click "Export" for a price book and to edit for changes, and buttons for "Manage", "Export (.xlsx)", and "Export (.csv)".
- Materials:** Includes a gear icon, a title "Materials", instructions to click "Manage" for viewing/organizing and "Export" for downloading, and buttons for "Manage", "Export (.xlsx)", and "Export (.csv)".

Equipment – Download the Price Book

- Worksheet contains all active equipment models in your Price Book.
- Equipment displays on the Option Tab in the Sales Builder Pro app.
- The drop-down arrows  that appear on each column heading allow a Sort and/or Filter to be applied.

	A	B	C	D	E	F	G	H	I	J
1	Price Book	Training								
2	Date	09/12/2017								
3	Time	4:07 PM								
4										
5	Equipment									
6										
7	Change / Edit Y/N	Comments or Explanation	OEM	Type	Model Display Name	Cash Price	Regular Price	Cost	Calculated Price	Final Price
8			Deluxe	Air Conditioner	16DG1718 Gold Series (990)	0		990	2418	Calculated
9			Deluxe	Air Conditioner	16DG1724 Gold Series (1040)	0		1040	2495	Calculated
10			Deluxe	Air Conditioner	16DG1730 Gold Series (1140)	0		1140	2649	Calculated
11			Deluxe	Air Conditioner	16DG1736 Gold Series (1220)	0		1220	2772	Calculated
12			Deluxe	Air Conditioner	16DG1742 Gold Series (1310)	0		1310	2910	Calculated
13			Deluxe	Air Conditioner	16DG1748 Gold Series (1440)	0		1440	3110	Calculated
14			Deluxe	Air Conditioner	16DG1760 Gold Series (1730)	0		1730	3556	Calculated
15			Deluxe	Air Conditioner	16DG1818 Gold Series (1200)	0		1200	2741	Calculated
16			Deluxe	Air Conditioner	16DG1824 Gold Series (1250)	0		1250	2818	Calculated
17			Deluxe	Air Conditioner	16DG1830 Gold Series (1340)	0		1340	2956	Calculated
18			Deluxe	Air Conditioner	16DG1836 Gold Series (1430)	0		1430	3095	Calculated
19			Deluxe	Air Conditioner	16DG1842 Gold Series (1530)	0		1530	3248	Calculated
20			Deluxe	Air Conditioner	16DG1848 Gold Series (1640)	0		1640	3417	Calculated
21			Deluxe	Air Conditioner	16DG1860 Gold Series (1930)	0		1930	3863	Calculated

Equipment – Cash, Cost, Calculated and Final Price

- **Cash Price** displays on the app when the Final Price is "Cash".
- **Regular Price** is not used for equipment. It is used for accessories and add-ons, covered later in the workshop.
- **Cost** is the \$ amount you pay your distributor (before tax) for the equipment
- **Calculated Price** is the \$ amount that displays on the app after the Business Rules have been applied.
- **Final Price** can be "Calculated" when a Business Rule is applied or "Cash" when a Business Rule is NOT applied.
- In this example all visible items are using Business Rules.

	A	B	C	D	E	F	G	H	I	J
1	Price Book	Training								
2	Date	09/12/2017								
3	Time	4:07 PM								
4										
5	Equipment									
6										
7	Change / Edit Y/N	Comments or Explanation	OEM	Type	Model Display Name	Cash Price	Regular Price	Cost	Calculated Price	Final Price
8			Deluxe	Air Conditioner	16DG1718 Gold Series (990)	0		990	2418	Calculated
9			Deluxe	Air Conditioner	16DG1724 Gold Series (1040)	0		1040	2495	Calculated
10			Deluxe	Air Conditioner	16DG1730 Gold Series (1140)	0		1140	2649	Calculated
11			Deluxe	Air Conditioner	16DG1736 Gold Series (1220)	0		1220	2772	Calculated
12			Deluxe	Air Conditioner	16DG1742 Gold Series (1310)	0		1310	2910	Calculated
13			Deluxe	Air Conditioner	16DG1748 Gold Series (1440)	0		1440	3110	Calculated
14			Deluxe	Air Conditioner	16DG1760 Gold Series (1730)	0		1730	3556	Calculated
15			Deluxe	Air Conditioner	16DG1818 Gold Series (1700)	0		1700	2741	Calculated

Equipment – Need to make changes to the Price Book?

- Use the Change/Edit Y/N and Comments or Explanation columns to indicate the items that need to be changed. It is helpful to highlight cells that you have changed.
- After completing the changes, be sure to save the document.
- Submit the document to the Document Portal.
- Your Customer Success Specialist will be notified of the submittal and will notify you when the work has been completed.

	A	B	C	D	E	F	G	H	I	J
1	Price Book	Training								
2	Date	09/12/2017								
3	Time	4:07 PM								
4										
5	Equipment									
6										
7	Change / Edit Y/N	Comments or Explanation	OEM	Type	Model Display Name	Cash Price	Regular Price	Cost	Calculated Price	Final Price
8	Y	Delete this model	Deluxe	Air Conditioner	16DG1718 Gold Series (990)	0		990	2418	Calculated
9	Y	Model Display Name changed	Deluxe	Air Conditioner	New Model Display Name -16DG1724 Gold Series (1040)	0		1040	2495	Calculated
10			Deluxe	Air Conditioner	16DG1730 Gold Series (1140)	0		1140	2649	Calculated
11			Deluxe	Air Conditioner	16DG1736 Gold Series (1220)	0		1220	2772	Calculated
12			Deluxe	Air Conditioner	16DG1742 Gold Series (1310)	0		1310	2910	Calculated

Accessories

- Scroll to the Accessory Section
- Select Export to download an excel spreadsheet (.xlsx)
- If you do not have an excel compatible spreadsheet program export the worksheet as a .csv.

The screenshot displays a mobile application interface with four main sections, each in a light green header bar:

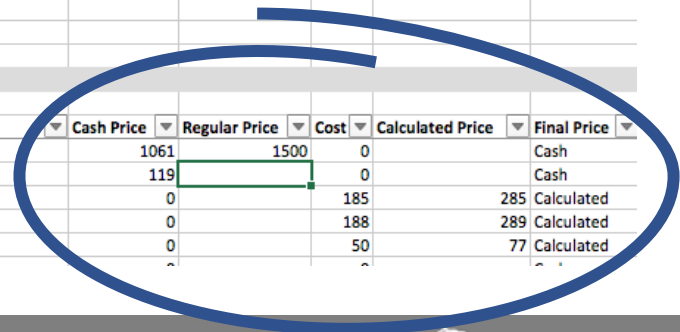
- Equipment:** Includes a house icon, a title, a description ("Click **Export** to download your equipment price book..."), a dropdown menu set to "Deluxe", and two "Export" buttons (one for .xlsx, one for .csv).
- Accessories:** Includes a document icon with a plus sign, a title, a description ("Click **Export** to download your accessories price book..."), and two "Export" buttons (one for .xlsx, one for .csv).
- Add-Ons:** Includes a wrench and screwdriver icon, a title, a description ("Click **Export** to download your add-ons (services) price book..."), and two "Export" buttons (one for .xlsx, one for .csv).
- Materials:** Includes a gear icon, a title, and a description ("Click **Manage** to View, Organize, Add, Remove, or Price materials..."). It features a "Manage" button and two "Export" buttons (one for .xlsx, one for .csv).

Accessory – Cash, Cost, Regular, Calculated and Final Price

- **Accessories Cash Price** displays on the app when the Final Price is "Cash".
- **Regular Price** maybe more familiar to you as "Stand-Alone" price. This would be the amount that you would quote the equipment for if it was NOT being installed with a new system. The sale price of the Honeywell Electronic Air Filtration would display \$1500 when quoted alone. When the equipment is quoted with a HVAC system, it will display a discount of \$439 and a sale price of \$1061.
- **Cost** is the \$ amount you pay your distributor (before tax) for the equipment
- **Final Price** is "Calculated" when a Business Rule is applied or "Cash" when a Business Rule is NOT applied.

**Calculated Price is the \$ amount that displays on the app after the Business Rules have been applied. Accessories typically do NOT use Business Rules.*

	A	B	C	D	E	F	G	H	I	J	K
1	Price Book	Training									
2	Date	09/13/2017									
3	Time	10:55 AM									
4											
5	Accessories										
6											
7	Change / Edit Y/N	Comments or Explanation	Block Name	OEM	Type	Model Display Name	Cash Price	Regular Price	Cost	Calculated Price	Final Price
11			Air Quality	Honeywell	Air Cleaner	Honeywell Electronic Air Filtration F300 TRAINING	1061	1500	0		Cash
12			Air Quality	Honeywell	Air Cleaner	Honeywell Whole-House Media Air Cleaner F100F2002 TRAINING	119		0		Cash
149			Mitsubishi Electric Remote Controller	Mitsubishi Electric	ME Remote Controller	Backlit Wireless Remote Controller (MHK1) TRAINING	0		185	285	Calculated
150			Mitsubishi Electric Remote Controller	Mitsubishi Electric	ME Remote Controller	Wired Remote Controller (PAR-32MAA-J) TRAINING	0		188	289	Calculated
151			Mitsubishi Electric Remote Controller	Mitsubishi Electric	ME Remote Controller	Lockdown bracket for remote controller (RCMKP1CB) TRAINING	0		50	77	Calculated



Accessory – Regular and Cash Price

Accessory Option 1:

The equipment is quoted with an HVAC system. The \$1500 Regular price is discounted \$439 to \$1061 (Cash Price)

Accessory Option 2:

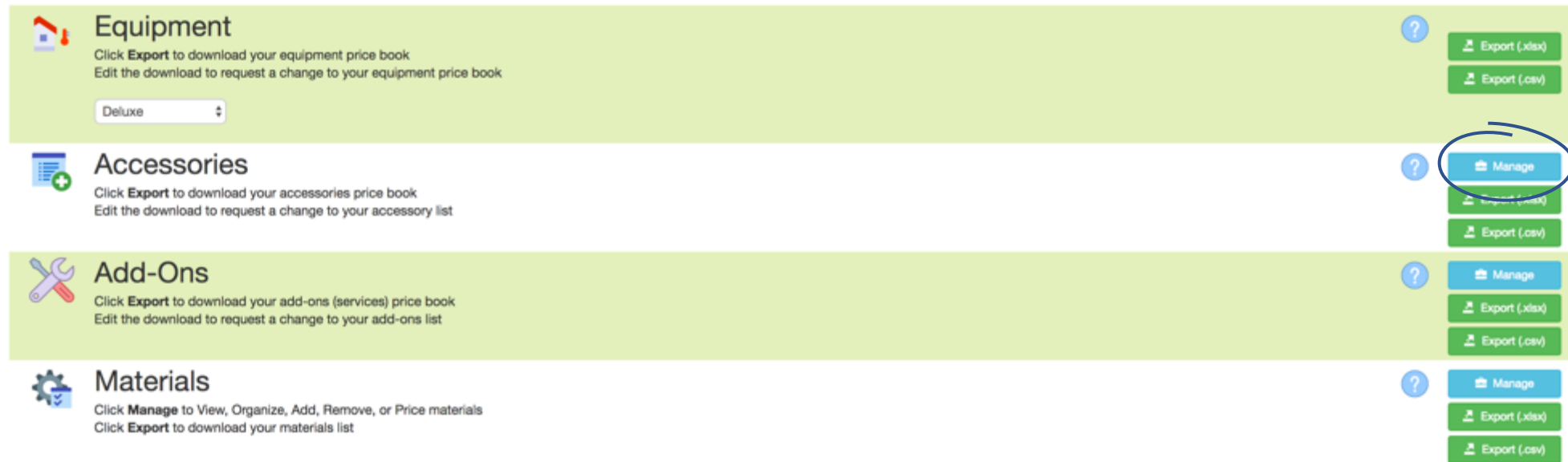
The equipment is quoted as a “Stand Alone”. The sale price of the Honeywell Electronic Air Filtration displays \$1500 when quoted alone.

Note: Regular Price feature works with Calculated and Cash Final Price.

The screenshot shows a mobile application interface for 'Enhancement' on an iPad. The top status bar shows 'iPad', '11:25 AM', and '38%' battery. The app header includes a 'Back' button, the title 'Enhancement', and a menu icon. Below the header are three tabs: 'Accessory' (selected), 'Add-On', and 'Material'. A prominent banner reads 'Optional Accessories Not Included in Equipment Prices'. The main content area is a table with columns for 'Unit Price' and 'Total'. It lists 'Thermostat' with a plus icon, 'Air Quality' with a plus icon, and 'Humidity Control' with a plus icon. Two rows for 'Honeywell Electronic Air Filtration F300 TRAINING' are shown. The first row has a quantity of '1 each', a unit price of '\$1,500.00', and a total of '\$1,500.00'. Below it, an 'Install Discount' of '(-) \$439.00' is shown, leading to a 'Subtotal' of '\$1,061.00'. The second row for the same product has a unit price of '\$1,500.00' and a total of '\$1,500.00', with a 'Subtotal' of '\$1,500.00'. To the right of the table are two summary sections: 'Accessory (Option 1)' with 'Air Quality' at '\$1,061.00' and a 'Total' of '\$1,061.00'; and 'Accessory (Option 2)' with 'Air Quality' at '\$1,500.00' and a 'Total' of '\$1,500.00'. Each row has a radio button labeled 'Option' next to it. The bottom navigation bar contains icons for 'Customer', 'Company', 'Option 1', 'Option 2', 'Option 3', 'Summary', 'Enhancement' (highlighted), and 'Signature'.

Accessories – Self Manage

- Scroll to the Accessories Section
- Select Manage



The screenshot displays a user interface with four main sections: Equipment, Accessories, Add-Ons, and Materials. Each section includes a title, a brief description, and a set of action buttons. The 'Accessories' section is highlighted in a light green color, and its 'Manage' button is circled in blue. The 'Equipment' section has a dropdown menu set to 'Deluxe'. The 'Add-Ons' and 'Materials' sections also have 'Manage' buttons and 'Export (.xlsx)' and 'Export (.csv)' buttons.

Section	Description	Buttons
Equipment	Click Export to download your equipment price book Edit the download to request a change to your equipment price book	Export (.xlsx) Export (.csv)
Accessories	Click Export to download your accessories price book Edit the download to request a change to your accessory list	Manage Export (.xlsx) Export (.csv)
Add-Ons	Click Export to download your add-ons (services) price book Edit the download to request a change to your add-ons list	Manage Export (.xlsx) Export (.csv)
Materials	Click Manage to View, Organize, Add, Remove, or Price materials Click Export to download your materials list	Manage Export (.xlsx) Export (.csv)

Accessories

Section Header – “Block”









UV Air Cleaner

Display Name always displays on the app and on the Customer Proposal

Price will display on the app and on the Customer Proposal when “Show Line Item Pricing” is set to ON

Select “Pencil” to edit

Active

Display Name	Price	File
 Favorite UV Air Cleaner 100 (Self Managed with brochure and thumbnail)	800	
 Favorite UV Air Cleaner 200 (Self Managed with Brochure)	1000	
 Favorite UV Air Cleaner 300 (Self Managed without brochure)	1000	
 Honeywell UV Filter UV2400U1000 TRAINING	199	



**Please contact your Customer Success Specialist to change block names or add additional blocks*

Accessory – Edit – Cash Price

- Edit the Display Name, Cost, **Cash Price** or Regular Price
- **Cost** is what you pay the Distributor
- **Cash Price** should include Margin, Tax, Labor
- **Regular Price** maybe more familiar to you as “Stand-Alone” price. This would be the amount that you would quote the equipment for if it was NOT being installed with a new system.
- Remove the Check mark from Active to Inactivate

USERS CAT Edit

Display Name

Honeywell FocusPro 4000 TH4110D1007 TRAINING

Cost Cash Price Regular Price

0 0

Active

000 TH4110D1007 TRAINING

000 TH5110D1022 TRAINING

000 TH6220D1028 TRAINING

TH3110D1008 TRAINING

000 TH8320R1003 TRAINING





✕ Cancel

Accessory – Edit – Calculated Price


- Edit Display Name, Cost, Regular Price
- **Cost** is what you pay the Distributor
- **Calculated Price** – Pricing rule will auto calculate
- **Regular Price** maybe more familiar to you as “Stand-Alone” price. This would be the amount that you would quote the equipment for if it was NOT being installed with a new system.
- Remove the Check mark from **Active** to Inactivate

The screenshot shows a mobile application interface. In the background, there is a list of accessories under the heading "Mitsubishi Electric Remote Controller". The list includes items like "Backlit Wireless Remote Controller (MHK1) TRAINING" and "Lockdown bracket for remote controller (RCMKP1CB) TRAINING". An "Edit" dialog box is overlaid on the screen, showing the details for the selected item. The dialog has a title bar with "Edit" and a close button. It contains a "Display Name" field with the text "Backlit Wireless Remote Controller (MHK1) TRAINING". Below that are three input fields: "Cost" with the value 185, "Calculated Price" with the value 285, and "Regular Price" which is empty. There is a checked checkbox labeled "Active" and a "Cancel" button at the bottom right.

Accessory – Add a new Accessory

UV Air Cleaner					
Active		Inactive			
Display Name	Price	File	Display Name	Price	File
 Honeywell UV Filter UV2400U1000 TRAINING	199		 Honeywell UV Filter UV2400U5000 TRAINING	448	



- Select the  to add an Accessory
- **Display Name** – appears in the app and on the Customer Quote
- **Cost:** is what you pay the distributor
- **Cash Price:** will be added to the quote
- **Regular Price:** “Stand Alone” Price
- **Important:** *Business Rules are not applied to Accessories that you manually add with this Self Manage function. Always include margin, tax, commission, etc. in the cash price.*

Add ×

Display Name Save

Display Name will appear in the app and on the Customer Quote

Cost **Cash Price** **Regular Price**

Distributor Cost Sell Price Stand Alone Price

Active









✕ Cancel

Accessories – Self Manage – “Pencil” – edit attachment

 Select the Pencil to edit attachments

UV Air Cleaner

Active

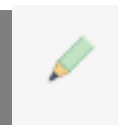
Display Name	Price	File
 Favorite UV Air Cleaner 100 (Self Managed with brochure and thumbnail)	800	
 Favorite UV Air Cleaner 200 (Self Managed with Brochure)	1000	
 Favorite UV Air Cleaner 300 (Self Managed without brochure)	1000	
 Honeywell UV Filter UV2400U1000 TRAINING	199	

← Self Managed – Document and thumbnail

← Self Managed – Document attached

← Self Managed – NO document

← IMS Managed



Accessories – Self Manage – Add an attachment

File Types:

PDF, PNG, JPG

See the next slide for file type and size requirements

Thumbnail: PNG or JPG

Choose File →
Upload →

Choose File →
Upload →

The screenshot shows the 'Edit' form with the following fields and controls:

- Display Name:** Favorite UV Air Cleaner 100 (Self Managed with brochure and thumbnail)
- Cost:** 400
- Cash Price:** 800
- Regular Price:** 1200
- Active
- File:** Radio buttons for 'View Current' and 'Upload File'. The 'Upload File' option is selected. Below it is a 'Choose File' button with the text 'IAQ PDF.pdf' and an 'Upload' button.
- Thumbnail:** Radio buttons for 'View Current' and 'Upload File'. The 'Upload File' option is selected. Below it is a 'Choose File' button with the text '400 x 400 thumbnail.png' and an 'Upload' button.
- At the bottom right are 'Delete' and 'Cancel' buttons.

The screenshot shows the 'Edit' form with the following fields and controls:

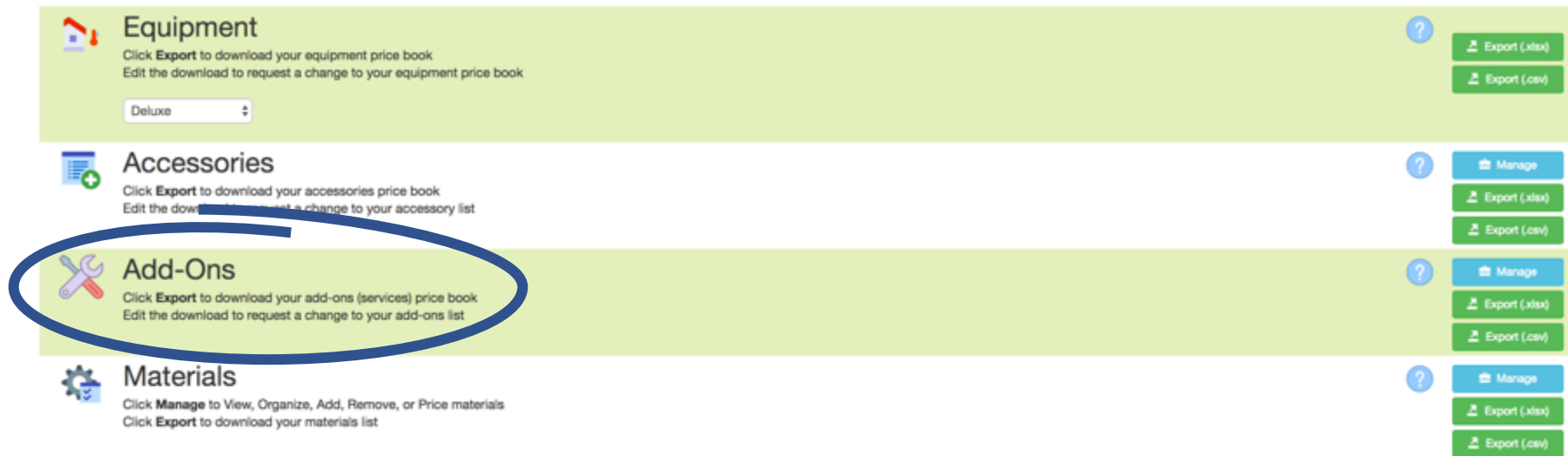
- Display Name:** Favorite UV Air Cleaner 100 (Self Managed with brochure and thumbnail)
- Cost:** 400
- Cash Price:** 800
- Regular Price:** 1200
- Active
- File:** Radio buttons for 'View Current' and 'Upload File'. The 'View Current' option is selected. Below it is a download icon and a 'Remove' button.
- Thumbnail:** Radio buttons for 'View Current' and 'Upload File'. The 'View Current' option is selected. Below it is a thumbnail image and a 'Remove' button.
- At the bottom right are 'Delete' and 'Cancel' buttons.

Accessory – Attachment - File Type and Size Requirements

File	File Type	Recommended Size	Maximum Size
Image	png, jpg	Less than 2.5 MB	5 MB
Document	pdf	Less than 12.5 MB	25 MB
Thumbnail	png, jpg	Square (400 x 400)	500 KB

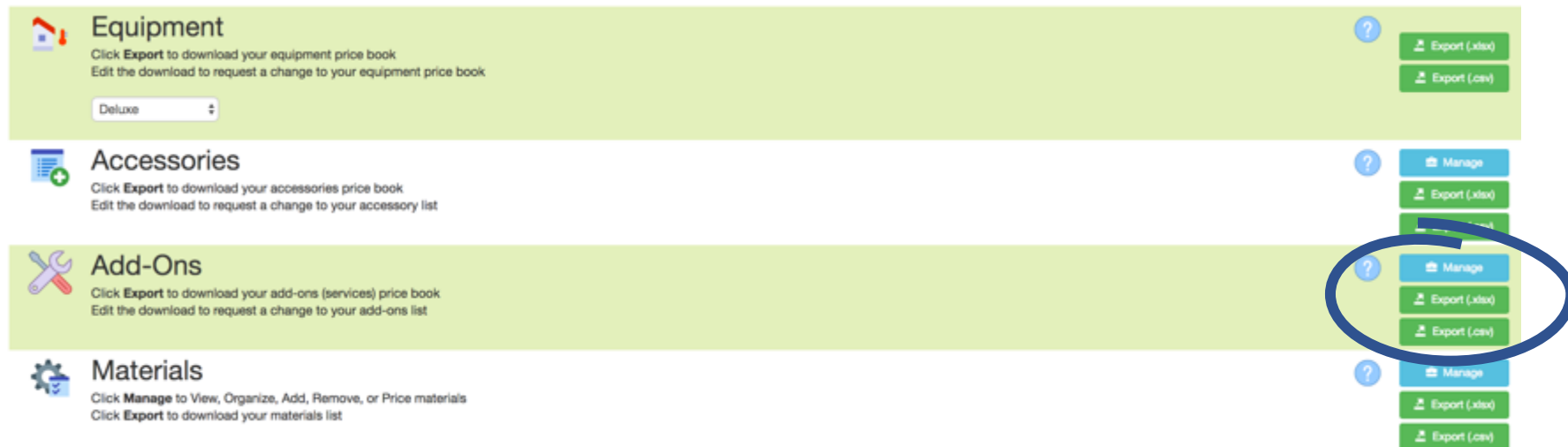
Add-Ons

- Scroll to the Add-Ons Section
- Select Export to download an excel spreadsheet (.xlsx)
- If you do not have an excel compatible spreadsheet program export the worksheet as a .csv.
- The Add-Ons export will include items that appear on the Add-Ons tab in the app. These items are usually services that you provide in addition to HVAC services and/or services that are associated with the installation.
- The export is identical to the Accessories export. Please refer to the Accessories slides 8 – 9 for details.



Add-Ons – Self Manage

- Scroll to the Add-Ons Section
- Select Manage
- The Add-Ons Self Manage is identical to the Accessories Self Manage features. Please refer to Accessories Slides 11 -17.



The screenshot displays a user interface with four main sections: Equipment, Accessories, Add-Ons, and Materials. Each section includes a title, a brief instruction, and a set of action buttons. The 'Add-Ons' section is highlighted with a blue circle around its 'Manage' button. The 'Equipment' section has a dropdown menu set to 'Deluxe'. The 'Accessories' and 'Materials' sections also have 'Manage' buttons. The 'Export (.xlsx)' and 'Export (.csv)' buttons are present for all sections except 'Equipment', which only has 'Export (.xlsx)' and 'Export (.csv)' buttons.

Section	Instructions	Buttons
Equipment	Click Export to download your equipment price book Edit the download to request a change to your equipment price book	Export (.xlsx) Export (.csv)
Accessories	Click Export to download your accessories price book Edit the download to request a change to your accessory list	Manage Export (.xlsx) Export (.csv)
Add-Ons	Click Export to download your add-ons (services) price book Edit the download to request a change to your add-ons list	Manage Export (.xlsx) Export (.csv)
Materials	Click Manage to View, Organize, Add, Remove, or Price materials Click Export to download your materials list	Manage Export (.xlsx) Export (.csv)

Materials

- Scroll to the Materials Section
- Select Export to download an excel spreadsheet (.xlsx)
- If you do not have an excel compatible spreadsheet program export the worksheet as a .csv.

The screenshot displays a user interface with four main sections, each with a title, a description, and a set of action buttons. The sections are:

- Equipment:** Click **Export** to download your equipment price book. Edit the download to request a change to your equipment price book. Includes a dropdown menu set to "Deluxe". Buttons: "Export (.xlsx)", "Export (.csv)".
- Accessories:** Click **Export** to download your accessories price book. Edit the download to request a change to your accessory list. Buttons: "Manage", "Export (.xlsx)", "Export (.csv)".
- Add-Ons:** Click **Export** to download your add-ons (services) price book. Edit the download to request a change to your add-ons list. Buttons: "Manage", "Export (.xlsx)", "Export (.csv)".
- Materials:** Click **Manage** to View, Organize, Add, Remove, or Price materials. Click **Export** to download your materials list. Buttons: "Manage", "Export (.xlsx)", "Export (.csv)".

A blue circle highlights the "Manage", "Export (.xlsx)", and "Export (.csv)" buttons for the Materials section.

Materials – Export

- **Description** displays on the app
- **Units(s)** - allow you to enter a quantity to sell by the ft., hrs., lbs., oz., sq. ft., qty.
- **Price** is the \$ amount that displays on the app **Financing “boost” will not apply to items on the Materials tab.*
- **Cost** is the \$ amount you pay your distributor for the material

**Keep in mind that the Price needs to include margin, taxes, commission and financing fees.*

**These items are generally no cost or very low cost items, that you want to display on the customer proposal.*

	A	B	C	D	E	F	G	H	I	J
1	Price Book	Training								
2	Date	09/14/2017								
3	Time	3:13 PM								
4										
5	Materials									
6										
7	Description	Price	Cost	Unit(s)			Description	Price	Cost	Unit(s)
8	Using Sales Builder Pro Defaults	0.00	0.00				Chimney liner	110.00	0.00	
9	Return air filter box	100.00	0.00				Flue pipe	0.00	0.00	
10	1 inch filter rack	0.00	0.00				PVC air intake/exhaust	0.00	0.00	
11	Low voltage wiring	0.00	0.00				Outdoor pad	0.00	0.00	
12	Drain pan	0.00	0.00				Line set	10.00	5.00	ft
13	PVC drain	0.00	0.00				Electric wiring whip	0.00	0.00	
14	Condensate pump	0.00	0.00				RX-11 flush	165.00	0.00	

Materials – Self Manage

- Scroll to the Materials Section
- Select Manage


The screenshot displays a user interface with four main sections, each with a title, icon, instructions, and a set of action buttons. The 'Materials' section is highlighted with a blue circle around its 'Manage' button.

- Equipment**: Icon of a house with a red exclamation mark. Instructions: "Click **Export** to download your equipment price book. Edit the download to request a change to your equipment price book." A dropdown menu shows "Deluxe". Action buttons: "Export (.xlsx)", "Export (.csv)".
- Accessories**: Icon of a document with a plus sign. Instructions: "Click **Export** to download your accessories price book. Edit the download to request a change to your accessory list." Action buttons: "Manage", "Export (.xlsx)", "Export (.csv)".
- Add-Ons**: Icon of a wrench and screwdriver. Instructions: "Click **Export** to download your add-ons (services) price book. Edit the download to request a change to your add-ons list." Action buttons: "Manage", "Export (.xlsx)", "Export (.csv)".
- Materials**: Icon of a gear with a checkmark. Instructions: "Click **Manage** to View, Organize, Add, Remove, or Price materials. Click **Export** to download your materials list." Action buttons: "Manage", "Export (.xlsx)", "Export (.csv)".

Materials – Self Manage

Drag the cross-hatch  to change the order of the line items

Select the Pencil to Edit the line item





























Select the  to add a new material line



Materials

Company: Training HVAC

Last Update: 09/14/17 3:12 PM by June Getzinger

Active

Description	Price	Cost	Unit(s)	Description	Price	Cost	Unit(s)
  Using Sales Builder Pro Defaults	\$0.00	\$0.00		  Chimney liner	\$110.00	\$0.00	
  Return air filter box	\$100.00	\$0.00		  Flue pipe	\$0.00	\$0.00	
  1 inch filter rack	\$0.00	\$0.00		  PVC air intake/exhaust	\$0.00	\$0.00	
  Low voltage wiring	\$0.00	\$0.00		  Outdoor pad	\$0.00	\$0.00	
  Drain pan	\$0.00	\$0.00		  Line set	\$10.00	\$5.00	ft
  PVC drain	\$0.00	\$0.00		  Electric wiring whip	\$0.00	\$0.00	
  Condensate pump	\$0.00	\$0.00		  RX-11 flush	\$165.00	\$0.00	

Materials – Edit – “Pencil”

- Select the pencil to edit an item.

	Description	Price	Cost	Unit(s)
 	Chimney liner	\$110.00	\$0.00	
 	Flue pipe	\$0.00	\$0.00	
 	PVC air intake/exhaust	\$0.00	\$0.00	
 	Outdoor pad	\$0.00	\$0.00	
 	Line set	\$10.00	\$5.00	ft
 	Electric wiring whip	\$0.00	\$0.00	
 	RX-11 flush	\$165.00	\$0.00	





- Edit the Description, Price Cost and/or units


Edit Material















Description:

Price: Cost: Unit(s):

Last Update: 09/14/17 3:12 PM by June Getzinger

Materials – Add a new Material

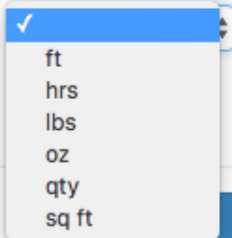
- Select the  to add a Material
- **Display Name** – appears in the app and on the Customer Quote
- **Price:** the Sell Price
 - *Price must include margin, tax, commission, financing fees. These items are generally no cost or very low cost items, that you want to display on the customer proposal.*
- **Cost:** is what you pay your distributor
- **Unit(s):** use when you sell by the ft, hrs, etc.



Active				
	Description	Price	Cost	Unit(s)
	 Using Sales Builder Pro Defaults	\$0.00	\$0.00	
	 Return air filter box	\$100.00	\$0.00	
	 1 inch filter rack	\$0.00	\$0.00	
	 Low voltage wiring	\$0.00	\$0.00	
	 Drain pan	\$0.00	\$0.00	
	 PVC drain	\$0.00	\$0.00	
	 Condensate pump	\$0.00	\$0.00	





Add Material


Description:
Description will appear in the app and on the Customer Quote

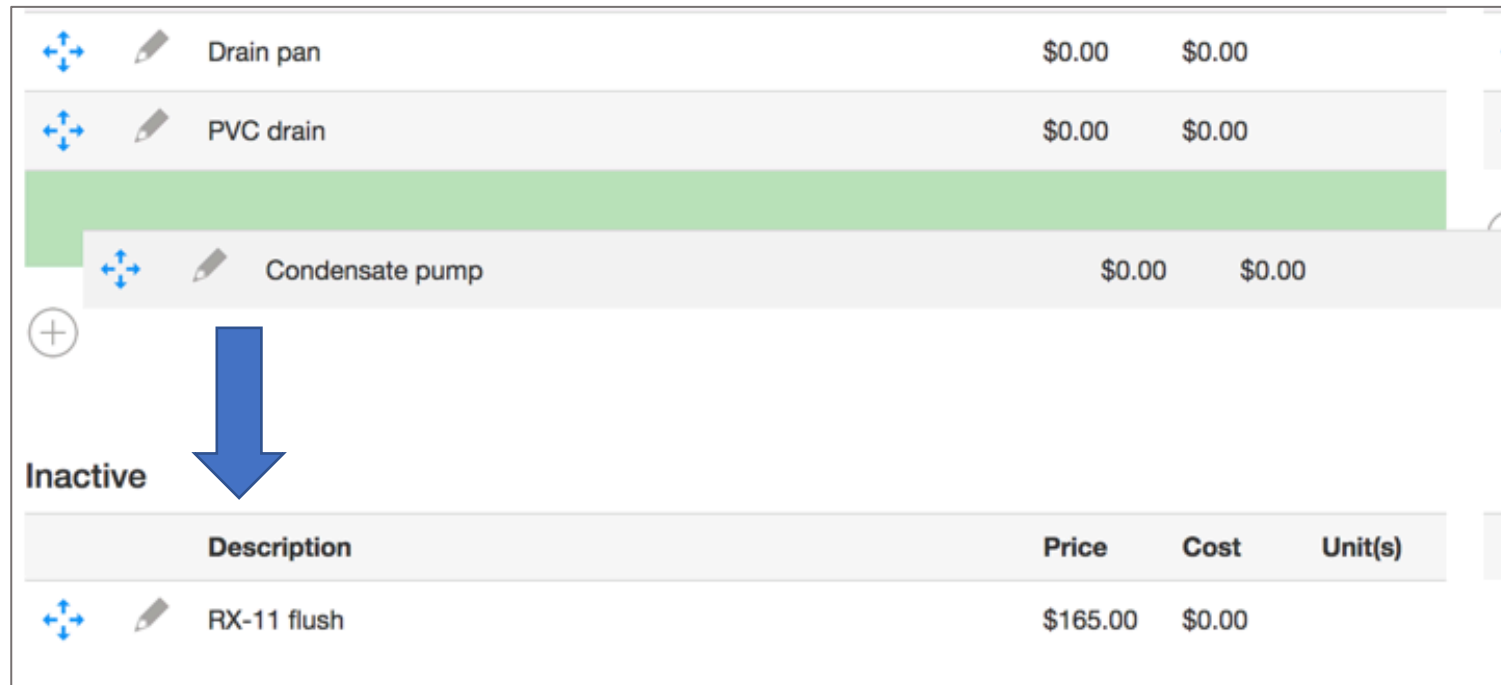
Price: Sell Price **Cost:** Distributor cost **Unit(s):** 

 Add  Cancel



\$100.00 \$0.00   Flue pipe

Materials – Inactivate

- Drag the cross-hatch  to move the item to the Inactive list or the active list



The screenshot shows a materials list interface. At the top, there are three items: 'Drain pan', 'PVC drain', and 'Condensate pump'. Each item has a blue cross-hatch icon to its left and a pencil icon to its right. The 'Condensate pump' item is highlighted with a green background. A blue arrow points from the cross-hatch icon of the 'Condensate pump' item down to the 'Inactive' list. Below the 'Inactive' list, there is a table with the following data:

Description	Price	Cost	Unit(s)
  RX-11 flush	\$165.00	\$0.00	

Financing Options

Scroll to the Financing Options Section

Select Export to download an excel spreadsheet (.xlsx)

If you do not have an excel compatible spreadsheet program export the worksheet as a .csv.

The screenshot displays a vertical list of five sections in a software interface. Each section has an icon, a title, a brief description, a help icon (question mark), and a set of action buttons. The 'Financing Options' section is highlighted with a blue oval.

Section	Icon	Description	Help	Buttons
Materials	Gears	Click Manage to View, Organize, Add, Remove, or Price materials Click Export to download your materials list	?	Manage, Export (.xlsx), Export (.csv)
Financing Options	Tablet	Click Manage to View, Organize, Add, or Remove programs Click Export to download your financing options	?	Manage, Export (.xlsx), Export (.csv)
Final Notes	List	Click Manage to View, Organize, Add, Remove, or Change default to On or Off	?	Manage, Export (.xlsx), Export (.csv)
Presentation	Person and speech bubble	Click Manage to View, Organize, Add, or Remove thumbnail images and presentation attachments	?	Manage, Upgrade
Sales Management Tools	Line graph	Click to View Dashboard	?	Users

Financing Options – Export

- **Program Name** - displays in the Finance Program selection pane
- **Payment Label** – displays on the app and the Customer Proposal
- **Term** – fill this field to divide the balance due into equal payments
- **Payment Factor %** - fill this field to apply a minimum monthly payment – this factor is usually provided by the Finance Company.
- **Dealer Fee %** - fill this field to increase the Sell Price of Equipment, Accessories and Add-Ons

**Dealer Fee % “Boost” is standard on Accessories and Add-Ons, speak with your CSS if you do NOT want the Dealer Fee % increase to apply to Accessories and Options*

**Dealer Fee % “Boost” NEVER applies to items on the Materials Tab.*

	A	B	C	D	E
1	Price Book	Training			
2	Date	09/14/2017			
3	Time	4:12 PM			
4					
5	Financing Options				
6					
7	Program Name	Payment Label	Term (months)	Payment Factor %	Dealer Fee %
8	1 year	/ mo	12		5.0%
9	2 year	/ mo	24		5.0%
10	3 year	/ mo	36		5.0%
11	4 year	/ mo	48		5.0%
12	5 year	/ mo	60		5.0%
13	Min Monthly	/ mo		1.49%	10.0%
14					

Financing Options – Self Manage

- Scroll to the Financing Options Section
- Select Manage

The screenshot displays a vertical list of management sections. Each section includes an icon, a title, a brief description, and a set of action buttons. The 'Financing Options' section is highlighted with a green background, and its 'Manage' button is circled in blue. The sections are as follows:

- Materials**: Click **Manage** to View, Organize, Add, Remove, or Price materials. Click **Export** to download your materials list. Buttons: Manage, Export (.xlsx), Add.
- Financing Options**: Click **Manage** to View, Organize, Add, or Remove programs. Click **Export** to download your financing options. Buttons: Manage, Export (.xlsx), Export (.csv).
- Final Notes**: Click **Manage** to View, Organize, Add, Remove, or Change default to On or Off. Buttons: Manage, Export (.xlsx), Export (.csv).
- Presentation**: Click **Manage** to View, Organize, Add, or Remove thumbnail images and presentation attachments. Buttons: Manage, Upgrade.
- Sales Management Tools**: Click to **View** Dashboard. Button: Users.

Financing Options – Self Manage



Drag the cross-hatch to change the order of the line items or to inactivate a Finance Program



Select the Pencil to Edit the Finance Program



Select the Plus to add a new Financing Program






Adjust Price For Down Payment – “Yes” – the app will recalculate the amount of dealer fee to apply to the quote after the down payment has been applied.

- *This is a default setting, speak to your CSS if you want the finance fee to apply to the sale price before the down payment.*
- *The Program with the highest Dealer Fee will display as Suggested Retail Price on the app*

Financing Options								
Company: Training HVAC								
Last Update: 09/06/17 12:26 PM by June Getzinger								
Active								
	Program Name	Payment Label	Term	Payment Factor	Dealer Fee	Adjust Price For Down Payment	Last Update	
		1 year	/ mo	12	5.0%	Yes	09/06/17 12:26 PM June Getzinger	
		2 year	/ mo	24	5.0%	Yes	09/06/17 12:26 PM June Getzinger	
		3 year	/ mo	36	5.0%	Yes	09/06/17 12:26 PM June Getzinger	
		4 year	/ mo	48	5.0%	Yes	09/06/17 12:26 PM June Getzinger	
		5 year	/ mo	60	5.0%	Yes	09/06/17 12:26 PM June Getzinger	
		Min Monthly	/ mo		1.49%	5.0%	Yes	09/06/17 12:26 PM June Getzinger
Inactive								
	Program Name	Payment Label	Term	Payment Factor	Dealer Fee	Adjust Price For Down Payment	Last Update	

Financing Options – Edit – “Pencil”

- Select the pencil to edit an item.

	Program Name	Payment Label	Term	Payment Factor	Dealer Fee	Adjust Price For Down Payment
	1 year	/ mo	12		5.0%	Yes
	2 year	/ mo	24		5.0%	Yes
	3 year	/ mo	36		5.0%	Yes
	4 year	/ mo	48		5.0%	Yes
	5 year	/ mo	60		5.0%	Yes



- Edit the Program Name, Payment Label, Term or Payment Factor %, and Dealer Fees

Edit Financing Option

Program Name:

Payment Label:

Term (months): Payment Factor: % Dealer Fee: %
 Adjust Price for Down Payment

HINT: If Payment Factor is not entered, 1 / Term will be used as the payment factor.

HINT: Finance Price = Cash Price / (1 - Dealer Fee)

HINT: If sales tax is shown on your proposal you need to increase your dealer fee to cover the added cost of financing sales tax. Just add an amount equal to your dealer fee times your sales tax. See instructions for an example.

Financing Options – Edit – “Pencil”

Program Name - displays in the Finance Program selection pane

Payment Label – displays on the app and the Customer Proposal

Term – fill this field to divide the balance due into equal payments

Payment Factor % - fill this field to apply a minimum monthly payment – this factor is usually provided by the Finance Company.

Dealer Fee % - fill this field to “boost” the Sell Price of Equipment, Accessories and Add-Ons

**Dealer Fee % increase is standard on Accessories and Add-Ons, speak with your CSS if you do NOT want the Dealer Fee% increase to apply to Accessories and Options*

**Dealer Fee % increase NEVER applies to items on the Materials Tab.*

**Dealer Fee % increase does not apply to Price Adjustments and Discounts*

Edit Financing Option

Program Name:
5 year

Payment Label:
/ mo

Term (months): 60 **Payment Factor:** % **Dealer Fee:** 5.0 %

Adjust Price for Down Payment

HINT: If Payment Factor is not entered, 1 / Term will be used as the payment factor.

HINT: Finance Price = Cash Price / (1 - Dealer Fee)

HINT: If sales tax is shown on your proposal you need to increase your dealer fee to cover the added cost of financing sales tax. Just add an amount equal to your dealer fee times your sales tax. See instructions for an example.

5.0% Yes

How is the Financing Fee applied?

$$\frac{\text{Cash Price}}{(1 - \text{Dealer Fee \%})} = \text{Financed Price}$$

$$\frac{\$ 1070}{(1 - .05)} = \$ 1127.00$$

$$\frac{\text{Financed Price}}{\text{Term}} = \text{Monthly Payment}$$

$$\frac{\$ 1127.00}{60} = \$ 18.78/\text{ mo.}$$

Edit Financing Option

Program Name:
5 year

Payment Label:
/ mo

Term (months): 60 **Payment Factor:** % **Dealer Fee:** 5.0 %
 Adjust Price for Down Payment

HINT: If Payment Factor is not entered, 1 / Term will be used as the payment factor.

HINT: Finance Price = Cash Price / (1 - Dealer Fee)

HINT: If sales tax is shown on your proposal you need to increase your dealer fee to cover the added cost of financing sales tax. Just add an amount equal to your dealer fee times your sales tax. See instructions for an example.

Special Case : Finance Fee + Sales Tax

If sales tax is shown on your proposal you need to increase your dealer fee to cover the added cost of financing.

When a financing program is selected the financing fee must include an allowance for sales tax. We recommend using the highest sales tax rate that is used in your region in this calculation.

- **Financing Fee: 5.0%**
- **Tax Rate: 7.25%**
- **Adjustment of financing fee for tax**
 $.05 + (.05 \times .0725) = .053625$
- **convert to percentage → Enter 5.36 in the Dealer Fee field**

Edit Financing Option

Program Name:
5 year

Payment Label:
/ mo

Term (months): 60 Payment Factor: % Dealer Fee: 5.36 %
 Adjust Price for Down Payment

HINT: If Payment Factor is not entered, 1 / Term will be used as the payment factor.

HINT: Finance Price = Cash Price / (1 - Dealer Fee)

HINT: If sales tax is shown on your proposal you need to increase your dealer fee to cover the added cost of financing sales tax. Just add an amount equal to your dealer fee times your sales tax. See instructions for an example.

5.0% Yes

Final Notes

Scroll to the Final Notes Section

Select Export to download an excel spreadsheet (.xlsx)

If you do not have an excel compatible spreadsheet program export the worksheet as a .csv.

The screenshot displays a vertical list of five sections, each with a unique icon, a title, a brief description, and a set of action buttons. The 'Final Notes' section is highlighted with a blue oval. The buttons for 'Export (.xlsx)' and 'Export (.csv)' are green, while 'Manage' is blue and 'Upgrade' is purple. A help icon (?) is present next to each section's title.

Section	Icon	Description	Buttons
Materials	Gears	Click Manage to View, Organize, Add, Remove, or Price materials Click Export to download your materials list	Manage, Export (.xlsx), Export (.csv)
Financing Options	Card	Click Manage to View, Organize, Add, or Remove programs Click Export to download your financing options	Manage, Export (.xlsx), Export (.csv)
Final Notes	List	Click Manage to View, Organize, Add, Remove, or Change default to On or Off	Manage, Export (.xlsx), Export (.csv)
Presentation	Speech bubbles	Click Manage to View, Organize, Add, or Remove thumbnail images and presentation attachments	Manage, Upgrade
Sales Management Tools	Line graph	Click to View Dashboard	Users

Final Notes Export

Notes are selected in the Customer Notes pane on the Signature Tab.

Show on Proposal Y/N:

“Y” – Note will appear on the Proposal when selected

“N” – Note will not appear on the Proposal

Sent to Back Office Y/N –

“Y” – Note will be included in the Back Office Email

“N” – Note will not be included in the Back Office Email

Default on Y/N –

“Y” – Note will default to ON on all proposals - user can turn off when building a quote

“N” – Note will default to OFF on all proposals – user can turn on when building a quote

	A	B	C	D
1	Price Book	Training		
2	Date	09/18/2017		
3	Time	5:24 PM		
4				
5	Final Notes			
6				
7	Note	Show On Proposal Y/N	Send To Back Office Y/N	Default On Y/N
8	All required permits are included.	Y	N	N
9	All applicable sales and local taxes are included.	Y	N	N
19	Sales notes (next steps if order not won): _____	N	Y	Y
20	Unitary Installation notes: _____	N	Y	Y

Blank line represents a fillable text box on the app.

Final Notes – Self Manage


- Scroll to the Final Notes Section
- Select Manage




The screenshot displays a vertical list of five sections, each with an icon, a title, a brief description, and a set of action buttons on the right. The sections are: Materials (gear icon), Financing Options (chip icon), Final Notes (list icon), Presentation (person and speech bubble icon), and Sales Management Tools (line graph icon). The 'Final Notes' section is highlighted with a light green background, and its 'Manage' button is circled in blue. The 'Manage' buttons for 'Materials', 'Financing Options', and 'Presentation' are also visible. The 'Export' buttons are present for 'Materials', 'Financing Options', and 'Final Notes'. The 'Upgrade' button is present for 'Presentation', and the 'Users' button is present for 'Sales Management Tools'.

Section	Icon	Description	Buttons
Materials	Gear	Click Manage to View, Organize, Add, Remove, or Price materials Click Export to download your materials list	Manage, Export (.xlsx), Export (.csv)
Financing Options	Chip	Click Manage to View, Organize, Add, or Remove programs Click Export to download your financing options	Manage, Export (.xlsx), Export (.csv)
Final Notes	List	Click Manage to View, Organize, Add, Remove, or Change default to On or Off	Manage, Export (.xlsx), Export (.csv)
Presentation	Person & Speech Bubble	Click Manage to View, Organize, Add, or Remove thumbnail images and presentation attachments	Manage, Upgrade
Sales Management Tools	Line Graph	Click to View Dashboard	Users

Final Notes – Self Manage

 Drag the cross-hatch to change the order of the line items or to inactivate a Finance Program

 Select the Pencil to Edit the Final Note

 Select the Plus to add an additional Final Note

Final Notes						
Company: Training HVAC						
Last Update: 09/25/17 4:06 PM by June Getzinger						
Active						
Preview		Show on Proposal	Send to Back Office	Default On	Last Update	
  All applicable sales and local taxes are included. <input type="text"/>		Yes	No	No	09/25/17 4:06 PM June Getzinger	
  Operational ductwork, venting, electrical wiring and drains are used as needed. <input type="text"/>		Yes	No	No	09/25/17 4:06 PM June Getzinger	

Final Notes– Edit – “Pencil”

Edit Final Note

Label: – Final note content

Show on Proposal

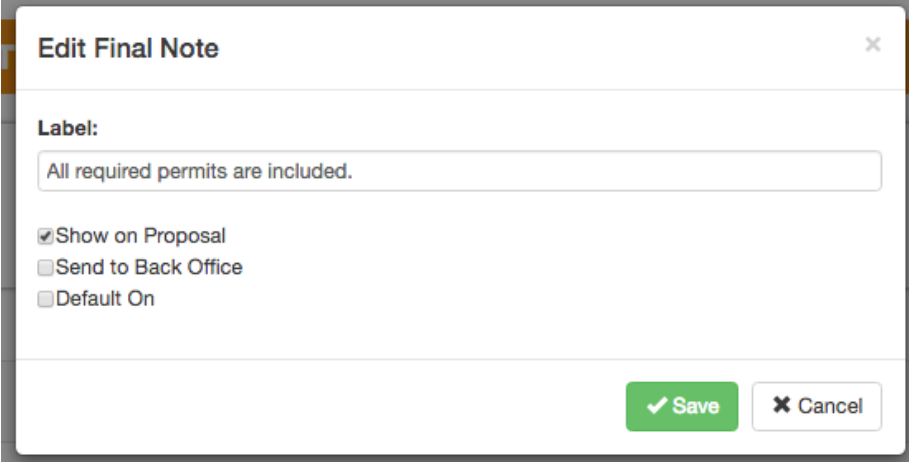
Note will display on proposal.

Sent to Back Office

Note will be included in the Back Office Email

Default On

Note will default to ON on all proposals - user can turn off when building a quote



Edit Final Note

Label:

All required permits are included.

Show on Proposal
 Send to Back Office
 Default On

Final Notes – Edit – “Add”

Label: – Final note content

Show on Proposal

Note will display on proposal.

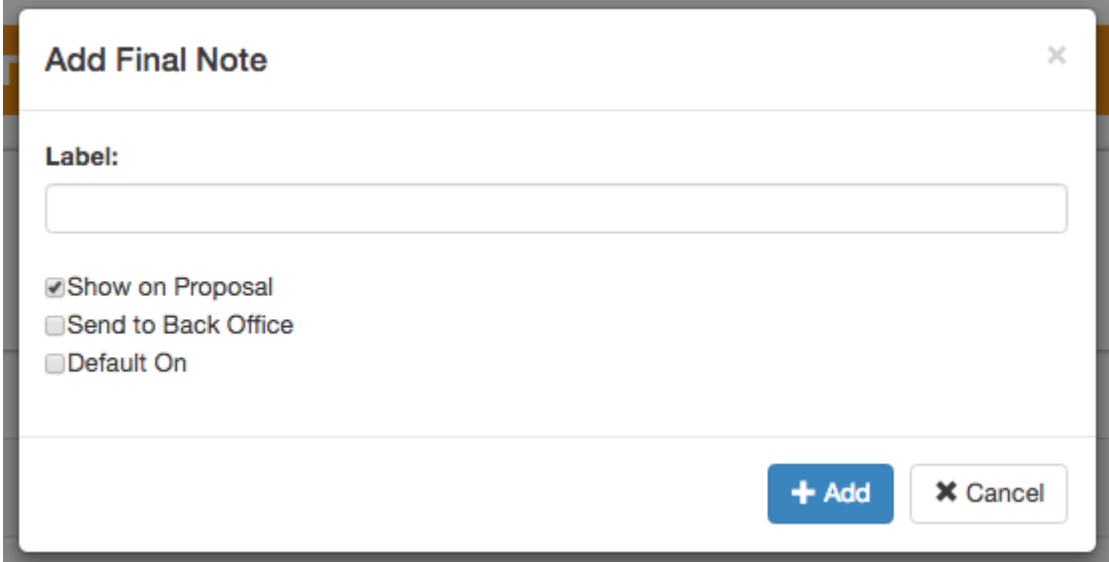
Send to Back Office

Note will be included in the Back Office Email

Default On

Note will default to ON on all proposals - user can turn off when building a quote

Select  to save the Final Note



Add Final Note

Label:

Show on Proposal

Send to Back Office

Default On

The software will display the note with a fillable text box at the end of the self managed note. User can fill the text box when building the quote or leave empty. An empty text box will not display on the proposal.

Presentation – Self Manage

- Scroll to the Presentation Section
- Select Manage

The screenshot displays a list of software sections. The 'Presentation' section is highlighted in light green. It includes a 'Manage' button, an 'Upgrade' button, and a 'Users' button. A blue circle highlights the 'Manage' and 'Upgrade' buttons.

Section	Icon	Description	Buttons
Materials	Gears	Click Manage to View, Organize, Add, Remove, or Price materials Click Export to download your materials list	Manage, Export (.xlsx), Export (.csv)
Financing Options	Card	Click Manage to View, Organize, Add, or Remove programs Click Export to download your financing options	Manage, Export (.xlsx), Export (.csv)
Final Notes	List	Click Manage to View, Organize, Add, Remove, or Change default to On or Off	Manage, Export (.xlsx), Export (.csv)
Presentation	Person	Click Manage to View, Organize, Add, or Remove thumbnail images and presentation attachments	Manage, Upgrade, Users
Sales Management Tools	Chart	Click to View Dashboard	Users

Presentation – Self Manage

1 **Why Choose Us?**

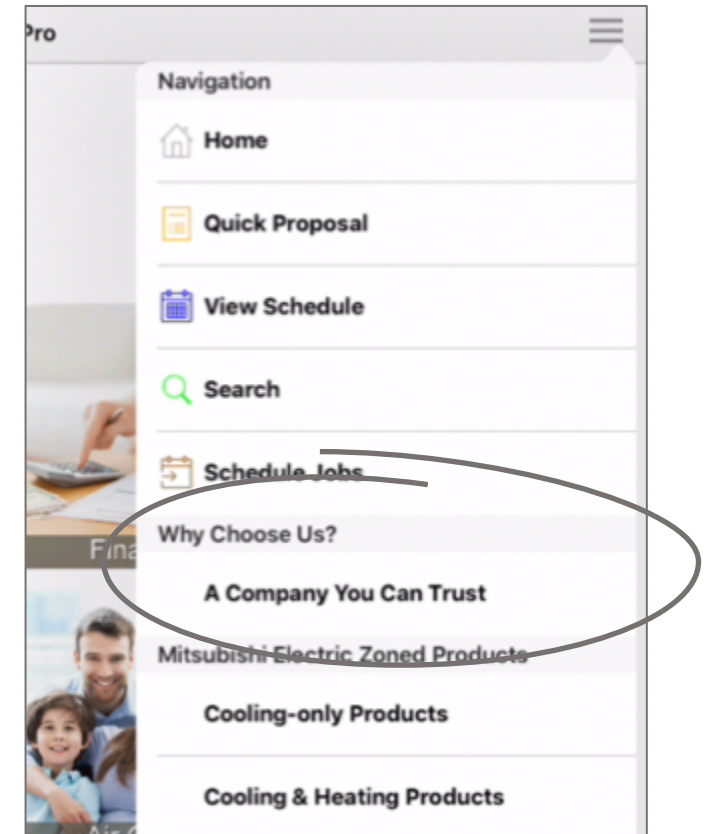
2 **A Company You Can Trust** ✎

Active

Display Name	File
✚ ✎ Our Company	📄
✚ ✎ Company Overview	📄

3

- 1 **“Why Choose Us?”** Navigation Menu Group (Presentation Button)
- 2 **“A Company You Can Trust”** Menu item
- 3 **“Our Company”** Menu item attachment
“Company Overview” Menu item attachment



Presentation – Self Manage



Drag the cross-hatch to change the order of the line items

Drag the item to the top of the Active/Inactive column to change activation status



Select the Pencil to edit the Menu Item attachment

Why Choose Us?

A Company You Can Trust Save

Active	Inactive										
<div style="border: 1px solid #ccc; padding: 5px;"><div style="display: flex; justify-content: space-between; align-items: center;">✚ ✎ Self Manage Presentation Asset📄</div><div style="background-color: #d9ead3; height: 20px; margin-top: 5px;"></div></div>	<table border="1"><thead><tr><th>Display Name</th><th>File</th></tr></thead><tbody><tr><td>✚ ✎ Contractor Provided</td><td>📄</td></tr><tr><td>✚ ✎ Contractor Provided</td><td>📄</td></tr><tr><td>✚ ✎ Contractor Provided</td><td>📄</td></tr><tr><td>✚ ✎ Contractor Provided</td><td>📄</td></tr></tbody></table>	Display Name	File	✚ ✎ Contractor Provided	📄	✚ ✎ Contractor Provided	📄	✚ ✎ Contractor Provided	📄	✚ ✎ Contractor Provided	📄
Display Name	File										
✚ ✎ Contractor Provided	📄										
✚ ✎ Contractor Provided	📄										
✚ ✎ Contractor Provided	📄										
✚ ✎ Contractor Provided	📄										
<div style="border: 1px solid #ccc; padding: 5px;"><div style="display: flex; justify-content: space-between; align-items: center;">✚ ✎ Our Company📄</div></div>											
<div style="border: 1px solid #ccc; padding: 5px;"><div style="display: flex; justify-content: space-between; align-items: center;">✚ ✎ Company Overview📄</div></div>											

Presentation– Edit – “Pencil”

Display Name: Menu Item Attachment – displays in presentation drop down

File:

Download to view current



Upload File:

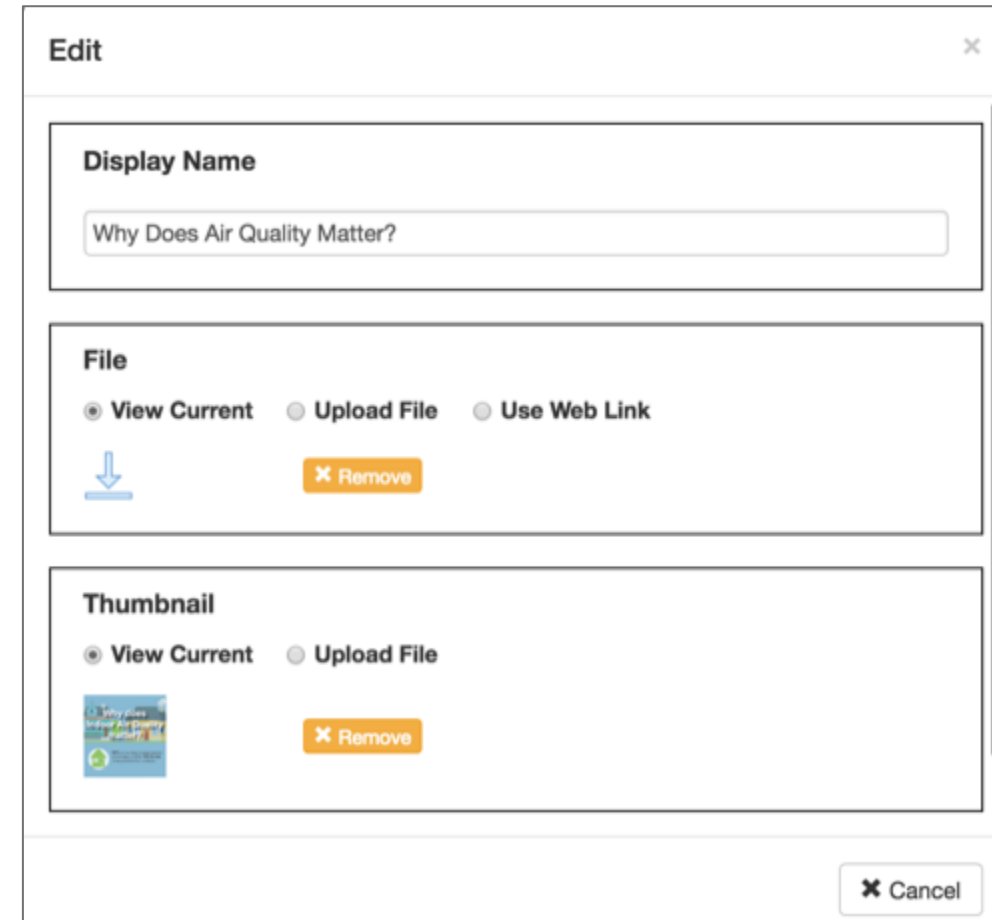
Image, Document, Video

Please see next slide for file type & size requirements

Use a Web Link - remember you must be online to connect to a website

Thumbnail:

Upload File – PNG or JPG square – please see next slide for size requirements

A screenshot of a software dialog box titled "Edit" with a close button (X) in the top right corner. The dialog is divided into three main sections: "Display Name", "File", and "Thumbnail".
1. "Display Name" section: Contains a text input field with the text "Why Does Air Quality Matter?".
2. "File" section: Features three radio buttons: "View Current" (selected), "Upload File", and "Use Web Link". Below the radio buttons is a blue download icon and an orange "Remove" button.
3. "Thumbnail" section: Features two radio buttons: "View Current" (selected) and "Upload File". Below the radio buttons is a small thumbnail image of a document and an orange "Remove" button.
At the bottom right of the dialog is a "Cancel" button with an X icon.

Presentation – Attachment - File Type and Size Requirements

File	File Type	Recommended Size	Maximum Size
Image	png, jpg	Less than 2.5 MB	5 MB
Document	pdf	Less than 12.5 MB	25 MB
Video	mp4	Less than 25 MB	50 MB
Thumbnail	png, jpg	Square (400 x 400)	500 KB

Management Portal Summary

Customize and Manage your App

1. Export and edit the Equipment, Accessory, Add-Ons, Materials – submit edited sheets to your CSS during the build process and designated update sessions.
2. Self Manage – Accessories, Add-Ons, Materials, Financing, Final Notes and Presentations
 - Edit display names, pricing, attachments
 - Add new items
 - Remove items





Need help? Have questions?

- Attend a Live Session - Portal Workshops are conducted every Wednesday at 10 AM.
- Visit our website page [Training & Implementation](#) to register.
- Contact your Customer Success Specialist
- Feedback? Questions?
- Email June
(jgetzinger.ims@imobilesupport.com)