

Quick Start Guide

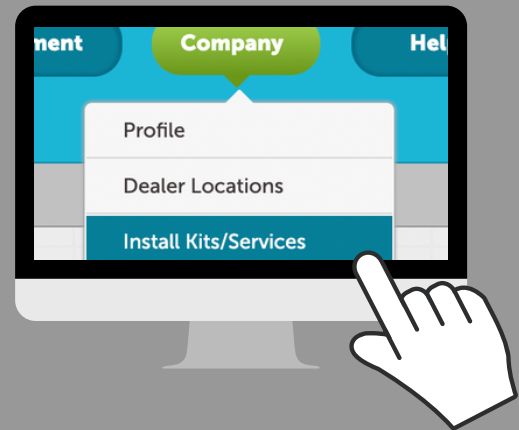


Step 1



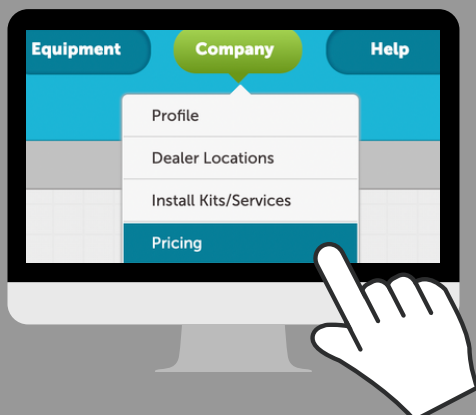
**Review Your Company
profile and Pricebook**

Step 2



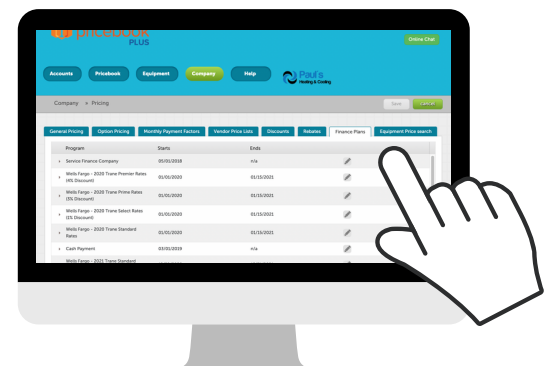
**Review Your Install Kits
and Services**

Step 3



Review Your Pricing

Step 4



**Review Your
Financing Options**

Quick Start Guide

Estimated time to complete: ~5-10 min



Review Your Pricebook

Click the "Pricebook" button at the top of the page.

Review your book. Note this section is for your reference, and you will not be able to build a Proposal here.



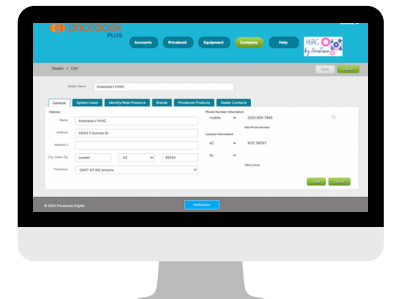
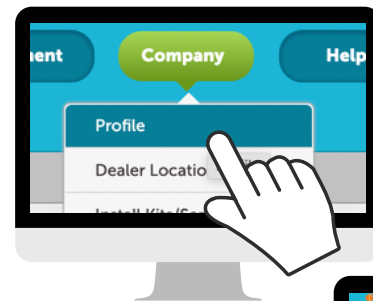
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Hover over the "Company" button and navigate to "Profile"

Review your company information and make any edits.



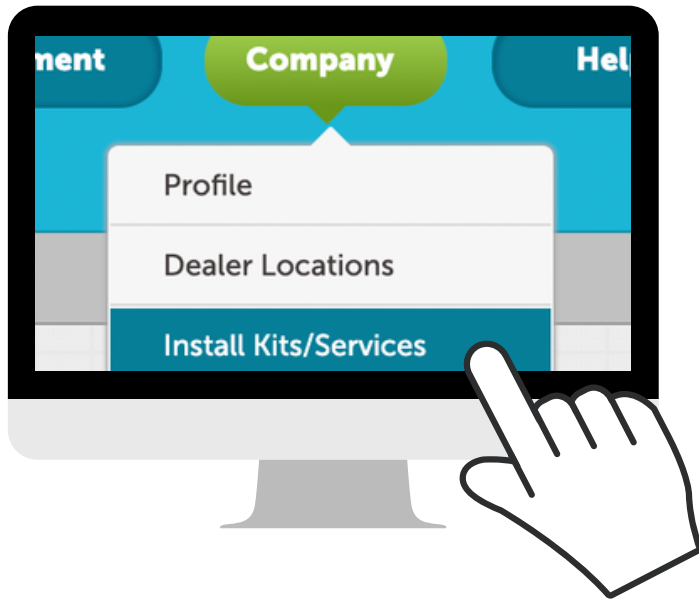
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Review Your Company Profile

Quick Start Guide

Estimated time to complete: ~20 min



Review Your Install Kits

Hover over the "Company" button and navigate to "Install Kits/Services."

Review and edit the labor and materials included in your Install Kits. You may add additional Install Kits as needed

**Remember - Install Kits are invisible to your customers.*



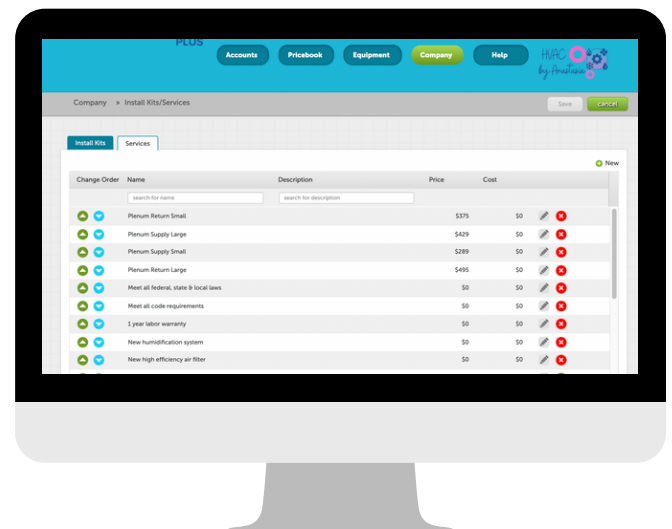
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Click the Services tab to edit or remove existing Services.

Add any Services you may want to offer on your Proposals.



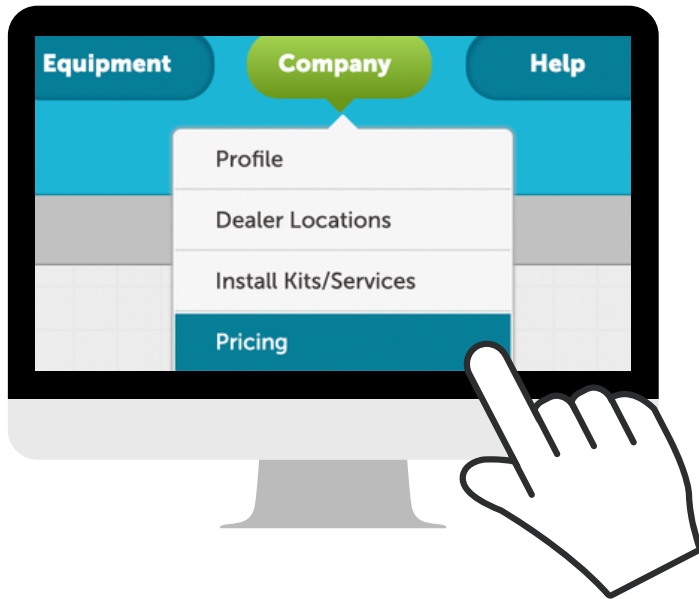
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Review Your Services

Quick Start Guide

Estimated time to complete: ~20 min



Review Your Pricing

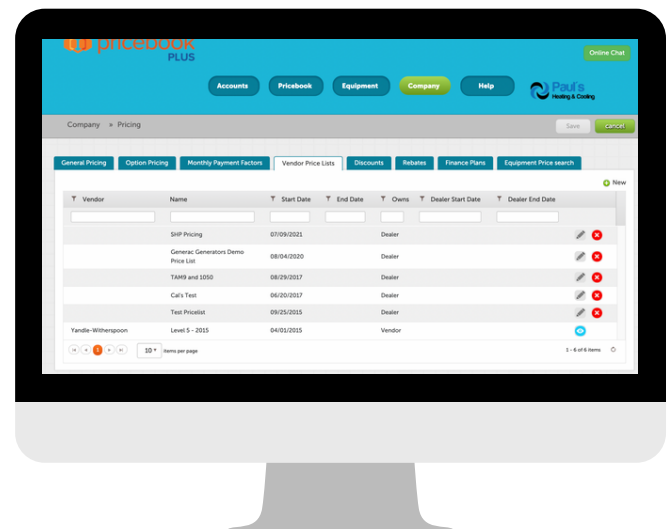
Hover over the "Company" button and navigate to "Pricing."

Review and edit your margin, sales tax, labor cost/hr and Financing Factor (fee).

**Tip: Now you can assess your retail prices by reviewing in the "Pricebook" section.*

Explore the remaining tabs in the "Pricing" section, customizing as needed.

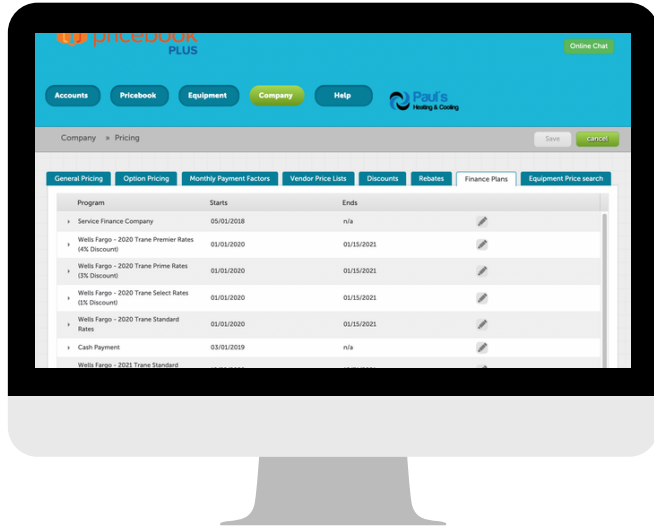
Notice the "Vendor Price Lists" tab includes your equipment costs.



Review Your Price Lists

Quick Start Guide

Estimated time to complete: ~10-15 min



Review Your Financing Plans

Hover over the "Company" button and navigate to "Pricing." Click the "Finance Plans" tab.

Review your finance plan selections. Use the pencil to turn individual plans on/off.

If you need additional plans added, email the rate sheets to support@pricebook.digital

