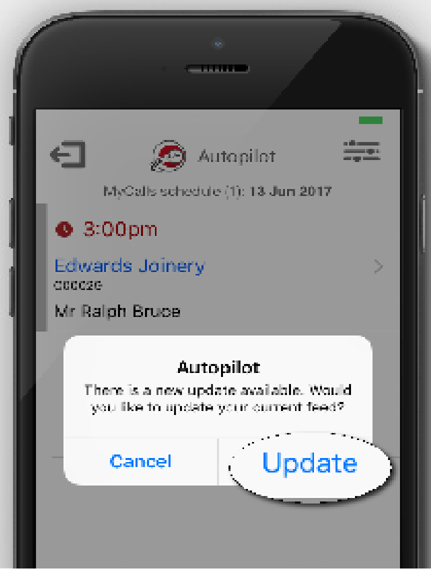
iOS AUTOPILOT HOW TO GUIDE

Autopilot is an offline feature for your sales-i app, designed to help simplify your daily call preparation and notes. It reads from your MyCalls diary, and, using this information generates reports and key sales information. This is done overnight and is ready when you log into sales-i the next day. It couldn't be any easier.

01 You can access **Autopilot** from your sales-i app Home Page on iOS.

Alternatively, access **Autopilot** at the login screen of your sales-i app.

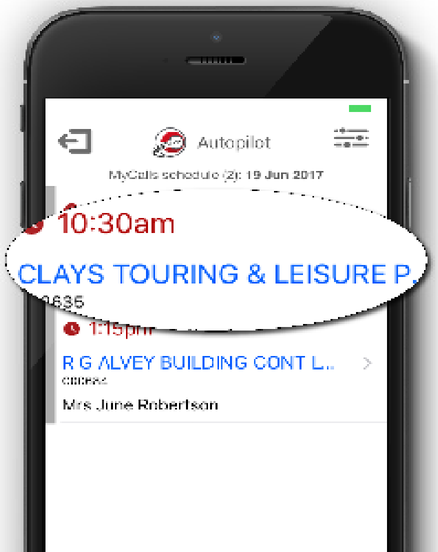


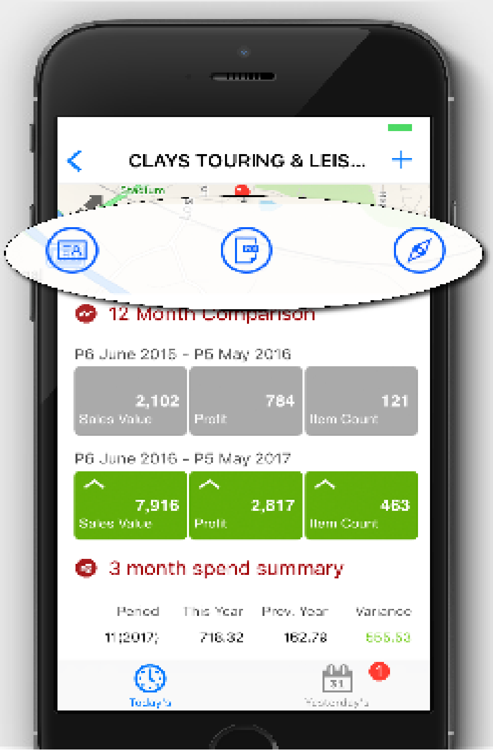
02 A pop-up will appear prompting you to update your Autopilot feed.
Tap **Update** to download your calls for the day*.

(*Requires 3G/Wi-Fi connection)

03 Tap on a call to view more details. From here you can access information about the customer, this call and an overview of the customer's spend.

You will need to allow the sales-i app to use your location and to have internet connection in order to use the map and navigation features.





04 The three icons at the top of the page allow you to access the CRM* (icon on the left), and Directions (icon on the right)* to the customer via navigation in your devices dedicated map app.

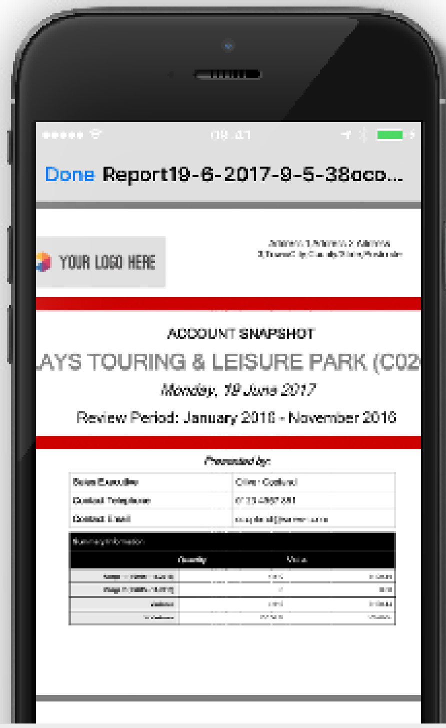
*Requires 3G/WiFi connection.

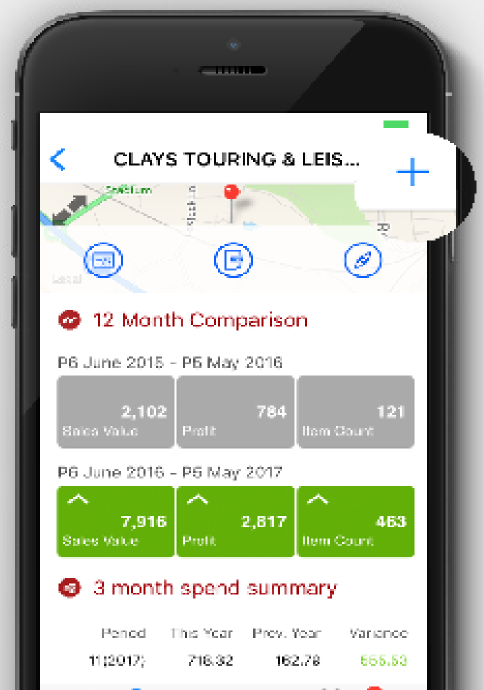
05 The icon in the center (from step 4) will load the **Snapshot*** report for the customer.

This is a customer facing document that clearly and cleanly presents customer spend data in an easy-to-read document.

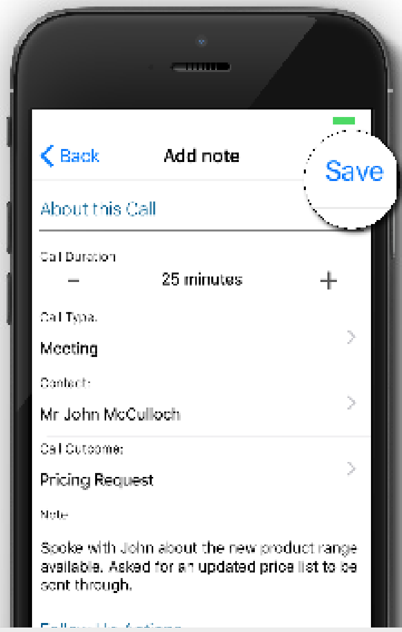
Once finished viewing, tap **Done** to return to previous screen.

*Customizable via the desktop.





06 To add a note; tap the + icon in the top right of your iOS screen.

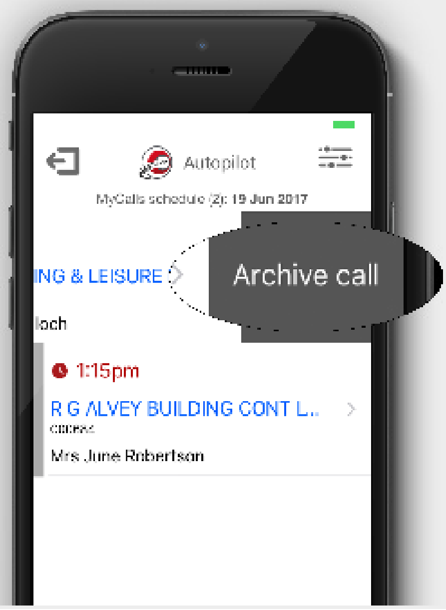


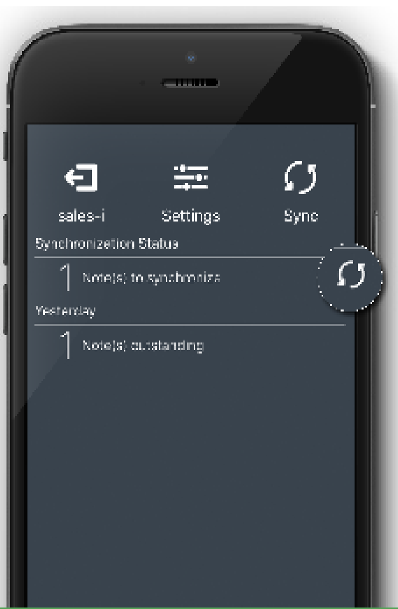
07 Fill in the relevant information, including Call Type, Call Outcome, any Notes, as well as any Follow-Up Actions.*

Tap **Save** to add the note to sales-i.

*Please note: How to guide for MyCalls is available on the support site.

08 To Archive the call, from the Autopilot home screen, swipe right-to-left on the required call and tap **Archive Call**.





09 To Synchronize, connect to the internet and stay in the app for 10 minutes. Autopilot will automatically update your notes to sales-i.

To manually sync, tap the **Settings** icon from the Autopilot home screen in the top right, then tap the **Sync** icon next to the **Note(s) to Synchronize**.

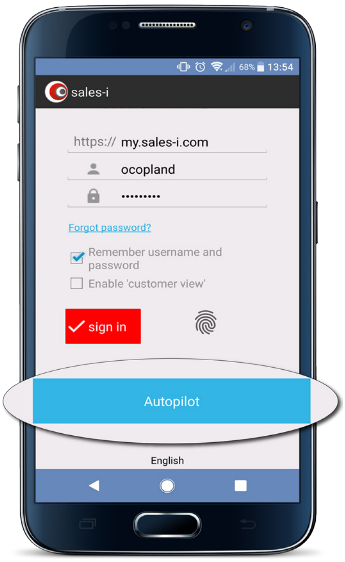
TOP TIP: Autopilot is a great backup, whether you plan to use it or not – who knows when you'll find yourself with an unreliable internet connection!

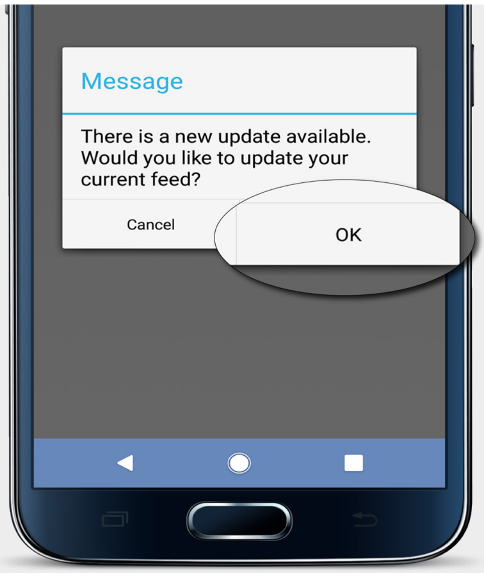
https://my.sales-i.com 1-847-868-8175 support@sales-i.com https://support.sales-i.com

ANDROID AUTOPILOT HOW TO GUIDE

Autopilot is an offline feature for your sales-i app, designed to help simplify your daily call preparation and notes. It reads from your MyCalls diary, and, using this information generates reports and key sales information. This is done overnight and is ready when you log into sales-i the next day. It couldn't be any easier.

01 You can access **Autopilot** from the login screen of your sales-i Android app.





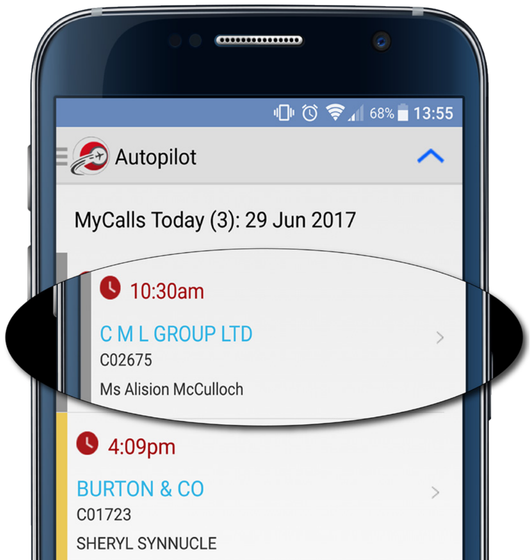
02 A pop-up will appear prompting you to update your Autopilot feed.

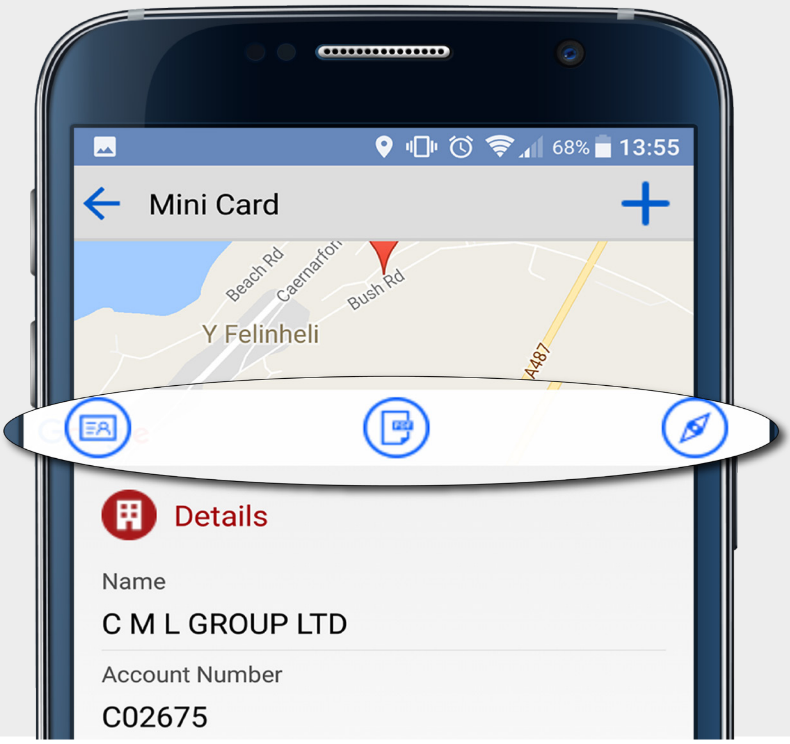
Tap **OK** to download your calls for the day*.

(*Requires 3G/Wi-Fi connection)

03 Tap on a call to view more details. From here you can access information about the customer, this call and an overview of the customer's spend.

You will need to allow the sales-i app to use your location and to have internet connection in order to use the map and navigation features.





04 The three icons at the top of the page allow you to access the CRM* (icon on the left), and Directions (icon on the right)* to the customer via navigation in your devices dedicated map app.

*Requires 3G/WiFi connection.

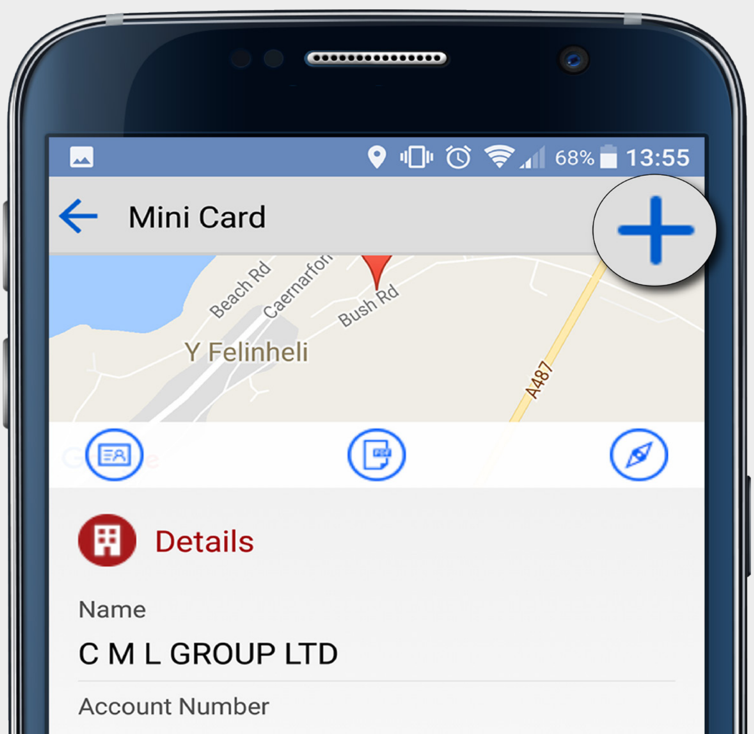
05 The icon in the center (from step 4) will load the **Snapshot*** report for the customer.**

This is a customer facing document that clearly and cleanly presents customer spend data in an easy-to-read document.

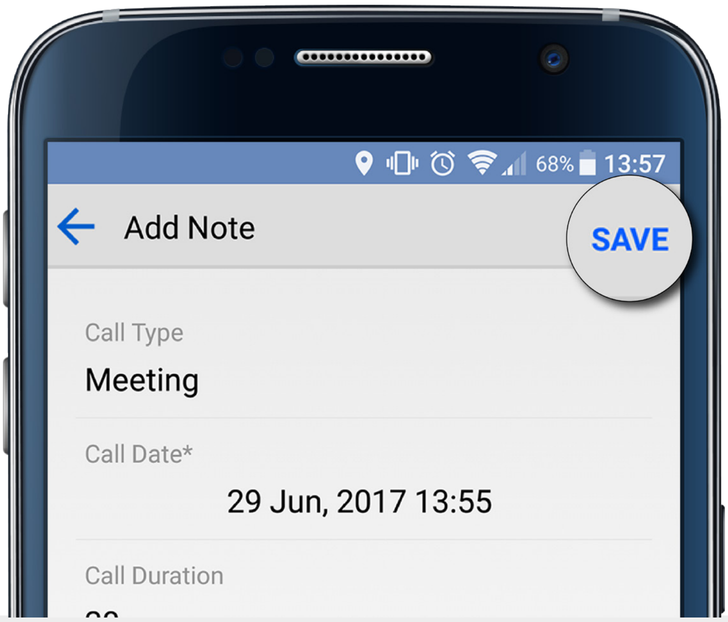
Once finished viewing, tap **Done** to return to previous screen.

*Customizable via the desktop.

**PDF viewer must be set up on your Android device to enable viewing of this report.



06 To add a note; tap the + icon in the top right of your Android screen.



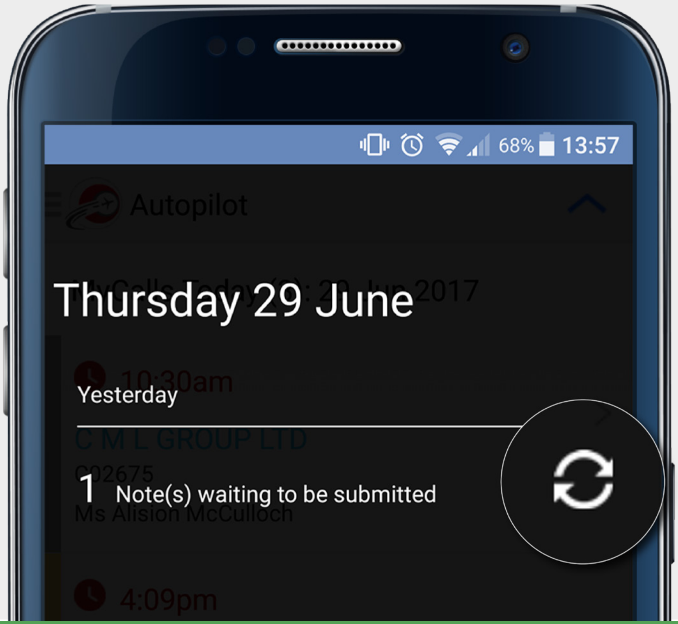
07 Fill in the relevant information, including Call Type, Call Outcome, any Notes, as well as any Follow-Up Actions.*

Tap **Save** to add the note to sales-i.

*Please note: How to guide for MyCalls is available on the support site.

08 To Synchronize, connect to the internet and stay in the app for 10 minutes. Autopilot will automatically update your notes to sales-i.

To manually sync, tap the **blue arrow** icon from the Autopilot home screen in the top right, then tap the **Sync** icon next to the **Note(s) waiting to be submitted.**



TOP TIP: Autopilot is a great backup, whether you plan to use it or not – who knows when you'll find yourself with an unreliable internet connection!

VISIT OUR SUPPORT SITE

Don't forget to visit our support site online to view sales-i how to's, tips, tricks and best practices.

https://support.sales-i.com

https://my.sales-i.com 1-847-868-8175 support@sales-i.com https://support.sales-i.com