

Gold Demo Scripts

Contents

Following is a list of the contents of your Gold Demo notebook.

NOTE: *The Relationships demo (which shows Life Insurance, Investment Information, and Employee Benefits) is not listed in the Notebook: Contents page. This demo is accessed through a personal profile in the Day Planner.*

The MobileScript demo is in the H. pylori demo (see page 3).

Demo	Page
Business Planner	19
Address List	19
Day Planner	19
Month Planner	20
Samples	17
Read Me	17
Loan Calculation	18
What's Your Mortgage?	18
Wheels & Hubs	18
NotePaper	19
Consumer Packaged Goods	8
Salon Turnover Order Form	8
Financial Services	10
Equipment Lease	10
TravelMedicalQuote	11
FleetServices	11
Relationships	13
Medical Supplies	2
Coulter	5
Customers	2
H. pylori	2
Pharmaceutical Sample Report ..	6
Surgical Instruments	6
Sales Process	16
Sales Process ROI	16
Support Documents	20

Introduction

Emphasize for All Audiences:

- **Dual use.** Emphasize that this solution extends the capability of a laptop — that it can be used as a laptop and can also be used interactively in front of the customer, where a laptop cannot be used.
- **Customer focus.** The light weight of the tablet and the simple gesture interface of SalesPoint means you can focus on your customers and their needs and not on the machine. You tap, flick, and swoop to do your work without shifting your attention away from your customer; the simplicity of a paper notepad with the power of a Windows 95 PC.
- **Standard system.** Show that the tablet supports a standard Windows 95 desktop environment.

Start the Demo

1. Start by showing the tablet with a keyboard attached. Briefly show the Windows desktop.
2. Double-tap SalesPoint.
3. While SalesPoint is booting, disconnect the tablet from the keyboard to show its dual use and how easily it can be held in one hand.
 - After SalesPoint boots, the Gold Demo notebook should be open to the Notebook: Contents page.
4. Talk about the interface: PAGE, document metaphor, table of contents, tabs.
 - Note that the tabs are like the tabs of a paper notebook: They mark a page so you can turn directly to that page.

In the following demo scripts, the steps are listed on the left side of the page, and points you might want to make are shown to the right of the step.

Unless otherwise stated, all demos begin at the Notebook: Contents page.

MEDICAL SUPPLIES

Customer List (General Medical)

1. Tap the **Customers** tab on the Notebook: Contents page.
 2. Flick up and down on the Customer List. Use the alphabetic tabs.
Demonstrate **swooping**:
3. Write a large **GL** in the middle of the page to display 038104, Glendale Eye Med Grp Inc at the top of the list.
- *Point out that the Customer List has scrolled. Compare this to flicking through pages of a paper notepad.*
- *Point out that the Customer List has scrolled to the exact customer you are looking for.*

Order Form

4. Display the Customer Order Guide:
 - Tap on the **COG** button to the right of Glendale Eye Med Grp Inc.
 5. Flick up and down on the Order Guide. Use the alphabetic tabs.
Demonstrate **swooping**:
6. Write a large **DR** in the middle of the page to display the DRUGS product section at the top of the list.
- *This is a customizable list of the products that this particular customer has ordered in the past or has expressed interest in.*
- *Point out that the Order Guide has scrolled.*
- *Point out that the Order Guide has scrolled to the exact section you want.*

Commission Calculator

7. Double-tap the **Commission Calculator** button to float the Commission Calculator.
 8. Move the Commission Calculator to the right so that you can see the item number column of the Order Guide.
Place an order:
9. Write **1** to the left of Diamox Seq 500MG (DRUG D0405 in the middle of the screen).
 10. Change the order to 2; change the order to 3. Watch the commission number go up.
 11. Change the order to 4.
 12. Tap the **Cancel** button on the confirmation dialog.
 13. Tap the close corner on the Commission Calculator.
- *Initially, the commission shown is \$0.0.*
- *Talk about the handwriting recognition capabilities.*
- *Note the changes on the Commission Calculator; you want the commission to move “up and out” on the table.*
- *Talk about the smart Order Guide.*

What's New

14. Double-tap the **What's New** tab to float the New document over the Customer Order Guide.
 15. Tap on the text **Quidel's new H. pylori test**. The H. pylori document opens floating and the New document is closed.
- *Compare this with the product list. This is an intelligent, interactive product encyclopedia — a sales intelligence tool.*

H. pylori

- The H. pylori document opens to the **QuickVue** page.
 16. Tap the **Procedure** tab.
- *Note that the tabs have changed to H. pylori tabs.*
- *Note the change in the tabs to show what page you are on.*

17. Tap the **Contents** tab.
 - **NOTE:** Do not make the circle gesture to go to the Contents page; you will get an **e-case** error message.
18. Tap on page **16**, CLIA Fees.
 - **NOTE:** Do not make any other gestures on a Publisher Contents page.
19. Tap the **Features and Benefits** tab.

MobileScript

20. Checkmark (**+**) on the **Coach** button in the cork margin.
21. Insert gesture (**-**) in the open space below the Stop button.
22. Tap on **Prompt**.
23. Edit gesture (**(**) on the new **Prompt** button.
24. Change the name of the button to “Prompt Demo”.
25. Checkmark on the new **Prompt Demo** button.
26. Edit gesture on the “**Prompt text**” and change it to “Tap to select.”.
27. Tap on the new **Prompt Demo** button.
28. Tap the **Cancel** button.
29. Back on the script sheet, tap on “**Tap to select:**” to highlight the prompt.
30. Tap the **New** menu option.
31. Edit gesture on “**text**” and change the text of the new prompt to “Choice 1”.
32. Tap on **Choice 1**, tap **New**, and create “Choice 2”.
33. Tap on the “**OK**” prompt, and tap the **Delete** menu option to delete that prompt.
34. Change the **Prompt Style** to Menu.
35. Tap on the new **Prompt Demo** button (not on the script sheet).

► *Note the change in the prompt style (command bar vs. menu).*
36. Tap the **Cancel** button.
37. Close gesture (**?**) on the **Prompt Demo script sheet**.
38. Draw a line from the **Date Stamp** button to your new **Prompt Demo** button.
39. Draw a line from **Choice 1** of your new prompt button to the **Quidel User** button.
40. Tap the **Begin** button of the Coach script.

► *Notice the Date Stamp and Prompt Demo buttons highlight as their scripts are executed.*
41. Tap **Choice 1**.
 - The first Quidel User prompt displays.
42. Tap on the asterisk (*****) on the Quidel User prompt.
43. Delete (scratch out) gesture (**3**) on the **Prompt Demo** button.
44. Tap the **OK** button on the confirmation dialog box.
45. Draw a line from the **Date Stamp** button to the **How do you evaluate** button.
46. Close gesture on the **Coach script palette**.
 - Be sure to begin the close gesture in the title bar.

Back to H. pylori

47. Tap the **Coach** button in the cork margin.
48. Tap **Refer to specialist**.
49. Tap **We send out to the laboratory**.
50. Tap **What is HP?**
51. Tap **Treatment**.
52. Tap **Antibiotics**.
53. Tap **Proof Source**.
 - The WSJART document opens.
54. Tap **OK**.
55. Flick to navigate the article (there are two pages).
56. Tap the **Return** button on the bottom of the WSJART document.
 - The QuickVue page is re-displayed.
57. Tap the **VOC** button in the cork margin.
 - The H. pylori Results document is displayed.
58. Tap on one of the two **Graph** buttons.
 - The data described on that line of the Survey Summary is displayed in graph form.
 - Write **P**, **L**, and **B** on the graph to display the data in pie chart, line, and bar graph forms.
59. Close gesture (?) on the graph page.
60. Close gesture on the Survey Summary (H. pylori Results).
 - The QuickVue page is re-displayed.
61. Tap the **Report** button in the cork margin.
 - The Call Report document is displayed.
62. Close gesture on the Call Report document.
 - The QuickVue page is re-displayed.
63. Tap the **FAQ** button in the cork margin.
64. Tap on #15, **Proficiency Testing?**
 - The Proficiency Testing document opens.
65. Enter **60** tests per month.
 - Change the number of tests per month by writing over it to show dynamic calculations and the effect on the Per Test Cost.
66. Close gesture on the Proficiency Testing document.
67. Close gesture on the H. pylori document to return to the order guide.
 - Be sure to begin the close gesture in the title bar.Add the H. pylori test to the order:
68. Make an insert gesture (-) on your Customer Order Guide to display the Product Lookup page.
69. Write **PYL** in the Word comb field.
70. Tap the **Find** button.
 - The Product Lookup Results page lists five H.PYLORI QUICK-VUE tests.

► *Note that the prompts they are seeing now are displayed by the script they were just looking at.*

► *This is the Wall Street Journal article.*

► *This page, titled “Survey Summary”, shows a summary of the data that is transmitted to the headquarters server.*

► *An email can be sent to the sales manager with this summary of the important information gathered during sales calls that day.*

► *Handle customer objections.*

► *This is used to clarify for the customer how the cost of regulatory compliance affects the cost per test.*

► *Point out that the Per Test Cost of Proficiency Testing, Net Per Test Reimbursement, and Total Annual Net all recalculate based on the number of tests per month.*

► *Assuming this is the first time this customer has seen this product, you need to add it to his custom product list.*

► *Note that 6 matches are found.*

71. Double-tap on the Commission Calculator.
72. Write **2** to the left of the last H. pylori test.
73. Close corner on the Commission Calculator.
74. Close corner on the Product Lookup Results page.
75. Close corner on the Product Lookup page.
76. Write a large **Q** in the middle of the Customer Order Guide.

► *Note the changes on the Commission Calculator.*

► *The Order Guide has scrolled to the Quidel section, which has just been created in this particular customer's order guide.*

HQ Communication

77. Tap the **Current Order** button.
78. Tap the **Send Order** button.
 - You are back at the Notebook: Contents page.
79. Tap the **Outbox** and show the order.
80. Mention Held Orders.
81. Mention HQ Library.

Back to What's New

82. Double-tap the **What's New** tab to float the What's New document over the Contents page.
83. Tap on the text **Coulter's MD Series II**. The Coulter document opens floating and the New document is closed.

Coulter

- The Coulter document opens to the COULTER page.
84. Tap the **Procedure** tab.
 85. Tap the **Survey** button.
 86. Enter the number of CBCs performed daily into the edit pad, and tap the **OK** button.
 - The value should be between 3 and 100 for demo purposes.
 87. Tap **In house**.
 88. Tap the name of any instrument listed.
 89. Tap on the age of the instrument.
 90. Tap **Lease**.
 91. Tap **It's OK**.
 92. Place a checkmark next to **Faster** and next to **Lower cost per test**.
 93. Tap **Continue**.
 94. Tap the **ROI** button in the left corner of the cork margin.
 - The Cost Analysis document is displayed.
 95. Tap **Lease**.
 96. Enter the percent Medicare, Medicaid, and private pay.
 97. Tap **Purchase**.
 - Toggle between **Lease** and **Purchase** to compare.

► *Note that the tabs have changed to Coulter tabs.*

► *Note the number of CBCs already displayed and say, "The last time we talked, you said you were performing this many CBCs. Are you still doing this many? No? How many are you doing?"*

► *The number of tests per day has already been entered.*

► *The percent Managed Care is assumed to be the remainder.*

Point out the total reimbursement per month and the final reimbursement the first year, plus the five-year total.

► *Note the changes in operating cost, first-year reimbursement, and five-year reimbursement, plus the addition of a line labeled Return on investment.*

98. Close gesture (?) on the Cost Analysis document.

99. Tap the **VOC** button in the cork margin.

- The Voice of the Customer page is displayed.

100. Tap the **Market Share** button in the cork margin.

- A 3-D graph of market share is displayed.

101. Close gesture on the Market Share document.

102. Close gesture on the Voice of the Customer document.

103. Close gesture in the title bar of the Coulter document.

- You are back at the Notebook: Contents page.

► *This displays a summary of data collected from all customers.*

Surgical Instruments

1. Tap on **Surgical Instruments** in the Medical Supplies section of the Notebook: Contents page.

2. Tap on page **6**: Webster Needle Holder.

- **NOTE:** Do not go to any other page in this demo.

3. Tap the **Better Value** button.

► *Show a better value product.*

4. Tap **OK**.

5. Tap **Yes**.

6. Change “43” to “23” simply by writing a **2** over the 4.

► *Note that the graphs change dynamically.*

- The TC needle holder is still a better value.

7. Close gesture (?) in the title bar of the Relative Cost Per Use document.

- **NOTE:** Be sure to begin the close gesture in the title bar. If you accidentally make one of the graphs an icon of a graph, just tap on the icon to restore the graph.

8. Close gesture on the Surgical Instruments document.

- Be sure to begin the close gesture in the title bar.

Pharmaceutical Sample Report

NOTE: Do not go directly to this document; you must go through the Day Planner (the document is hard coded to open with Dr. Payne’s name and address already filled in).

1. Tap the **Day Planner** tab.

2. Tap the Wednesday tab at the bottom of the Day Planner.

► *An appointment may have already been set up by the head office call center and downloaded to this agent’s Day Planner.*

3. Double-tap on **Les Payne** in the Day Planner.

- The Physician profile sheet for this client is displayed.

► *Review information that is already known about this client.*

4. Review the Payne profile.

► *These first steps would be done before the sales rep meets with the customer.*

5. Tap on the **Sample Report** notebook tab.

- The Pharmaceutical Sample Report page is displayed.

► *Notice that Dr. Payne’s name and address and today’s date are already automatically filled in.*

- Write the names of the drug samples you are leaving on the page:
- **NOTE:** Do not write too large when you write the names of the drug samples. Writing too large will litter the page with ink.
6. Write **VA** on the page. The name Valium is automatically filled in.
 - *You can write anywhere on the page. The system helps you fill out the drug names.*
 7. Write **TO** on the page. A choice list is displayed. Tap on Toradol 60.
 - *If you write enough letters to uniquely identify an item in the list, the full name is filled out immediately.*
 - *If you do not write enough letters, a choice list pops up.*
 8. Circle gesture (**(**) on Toradol 60.
 - *If the name is not correct, you can (on the name to specify a different one.*
 9. Write in quantities to the right of each drug name.
 10. Write in a signature for Dr. Payne.
 - **NOTE:** Do not write outside the signature pad; if you do, the signature will not be cleared the next time you open the document.
 - *Do not write outside the signature pad.*
 11. Tap on **Quidel's new H. pylori test.**
 - *As the doctor is signing, the sales rep has his attention. The rep says, "Can I show you this new product?"*
- ## H. pylori
- The H. pylori document opens to the **QuickVue** page.
12. Tap the **Procedure** tab.
 - *Note that the tabs have changed to H. pylori tabs.*
 13. Tap the **Contents** tab.
 - **NOTE:** Do not make the circle gesture to go to the Contents page; you will get an **e-case** error message.
 - *Note the change in the tabs to show what page you are on.*
 14. Tap on page **16**, CLIA Fees.
 - **NOTE:** Do not make any other gestures on a Publisher Contents page.
 15. Tap the **Features and Benefits** tab.
 16. Tap the **Coach** button in the cork margin.
 17. Tap **Refer to specialist.**
 18. Tap **We send out to the laboratory.**
 19. Tap **What is HP?**
 20. Tap **Treatment.**
 21. Tap **Antibiotics.**
 22. Tap **Proof Source.**
 - The WSJART document opens.
 - *This is the Wall Street Journal article.*
 23. Tap **OK.**
 24. Flick to navigate the article (there are two pages).
 25. Tap the **Return** button on the bottom of the WSJART document.
 - The QuickVue page is re-displayed.
 26. Tap the **VOC** button in the cork margin.
 - The H. pylori Results document is displayed.
 - *This page, titled "Survey Summary", shows a summary of the data that is transmitted to the headquarters server.*

27. Tap on one of the two **Graph** buttons.
 - The data described on that line of the Survey Summary is displayed in graph form.
 - Write **P**, **L**, and **B** on the graph to display the data in pie chart, line, and bar graph forms.
28. Close gesture (?) on the graph page.
29. Close gesture on the Survey Summary (H. pylori Results).
 - The QuickVue page is re-displayed.
30. Tap the **Report** button in the cork margin.
 - The Call Report document is displayed.
31. Close gesture on the Call Report document.
 - The QuickVue page is re-displayed.
32. Tap the **FAQ** button in the cork margin.
33. Tap on #15, **Proficiency Testing?**
 - The Proficiency Testing document opens.
34. Enter **60** tests per month.
 - Change the number of tests per month by writing over it to show dynamic calculations and the effect on the Per Test Cost.
35. Close gesture on the Proficiency Testing document.
36. Close gesture on the H. pylori document to return to the Pharmaceutical Sample Report.
 - Be sure to begin the close gesture in the title bar.
37. Close gesture on the Pharmaceutical Sample Report.
 - You are back at the Notebook: Contents page.

► An email can be sent to the sales manager with this summary of the important information gathered during sales calls that day.

► Handle customer objections.

► This is used to clarify for the customer how the cost of regulatory compliance affects the cost per test.

► Point out that the Per Test Cost of Proficiency Testing, Net Per Test Reimbursement, and Total Annual Net all recalculate based on the number of tests per month.

CONSUMER PACKAGED GOODS

Salon Turnover Order Form

NOTE: Do not go directly to this document; you must go through the Day Planner (the document is hard coded to open with Just in Style's name and address already filled in).

1. Tap the **Day Planner** tab.
2. Tap the Tuesday tab at the bottom of the Day Planner.
3. Double-tap on **Just in Style** in the Day Planner.
 - The Customer profile sheet for this client is displayed.
4. Review the Just in Style profile.
5. Tap on the **Order Form** notebook tab.
 - The Salon Turnover Order Form is displayed.
6. Tap the **Stylist** button.
7. Tap **Tina White**.

► An appointment may have already been set up by the head office call center and downloaded to this agent's Day Planner.

► Review information that is already known about this client.

► These first steps would be done before the sales rep meets with the customer.

► Notice that Just in Style's name and address and today's date are already automatically filled in.

8. Tap anywhere under the **Product Description** column in the table.
 - A choice list of brands is displayed.
9. Tap on any brand.
 - The Product List is displayed.
10. Enter some quantities.
11. Close gesture (?) on the Product List.
12. Enter a signature.
 - **NOTE:** Do not write outside the signature pad. Use the eraser to delete any stray ink.
13. Tap the **New Order** button.
14. Tap a name.
15. Tap the **PROMO** button.
 - The Miss Clairol Campaign document is opened.
16. Tap **What do you currently use?**
17. Tap any brand.
18. Tap anything.
19. Tap anything.
20. When you are finished saying what you currently use, tap **No other lines are used.**
21. Tap the **Exit** button.
22. Make a circle gesture anywhere on the page to turn to the table of contents page.
23. Tap #9, **Predictability.**
24. Tap **Survey Results.**
 - The Customer Response document is displayed.
 - This shows the survey data for this one customer.
25. Tap the **Clairol Survey Data** button.
 - The Clairol Survey Data document is displayed.
 - This shows the survey data for all customers.
 - Flick to navigate.
26. Tap the **Graph Data** button.
 - The graph document is displayed.
27. Write a **P** on the page to display the same data as a pie graph. Write an **L** to display a line graph. Write a **B** to redisplay the bar graph.
28. Close gesture (?) on the graph document.
29. Close gesture on Miss Clairol Campaign.
 - Be sure to begin the close gesture in the title bar.
30. Tap the **DCR** button.
31. Flick to navigate the DCR.
32. Close gesture on the DCR.
33. Close gesture on the STOF.
 - Do not make the close gesture in the Product Description area.

► *Note that you do not have to be careful about where you tap.*

► *Note the products you selected are added to the order form.*

► *Point out the **Eraser** button in the signature pad. Tap on it, and tap anywhere on the ink you want to delete.*

► *Note that the Order Form can share information with the Address List.*

► *The order form is cleared except for the new customer name.*

► *Note that the tabs have changed to Miss Clairol campaign tabs.*

► *Gather Market Intelligence.*

► *Handle customer objections.*

► *Voice of the customer.*

► *This is the information the home office gets.*

► *This shows brand survey data in graph form for all customers.*

► *It is easy to show different views of the same data.*

► *You can automatically fill out a call report.*

FINANCIAL SERVICES

Equipment Lease

1. Tap the **Equipment Lease** document title in the Financial Services section of the Notebook: Contents page.
2. Tap the **Transportation Equipment** button.
3. Tap **With your Lease or Buy decision?**
 - The Basic Lease Data document is displayed.
4. Tap the choice arrowhead under **Description**.
5. Tap anything.
6. Enter a purchase price; for example, \$1,200,000.
7. Enter 5 in the **Expected useful life** box.
8. Enter 5 in the **Tax Life** box.
9. Enter 32 in the **Tax Rate** box.
10. Enter 1.00 in the **Spread over Treasuries** box.
11. Tap the **CONTINUE** button.
 - You may need to pull the windowshade down further to see the CONTINUE button on the bottom of the page.
12. Tap **No, I already know**.
13. Tap **Yes**.
 - The Bottom Line document is displayed.
14. Replace “1.00” (third line) with “2.00”.
15. Tap the value to the right of the text **The PV advantage of leasing is...** (this value should be in green).
 - The Residual Value Analysis document is displayed.
16. Tap the **Return to Key Factors** button.
 - The KeyFactors document is displayed.
17. Tap the **equipment value** button.
 - The same Residual Value Analysis document is displayed again.
18. Tap the **See Bottom Line** button.
 - The same Bottom Line document is displayed again.
19. Tap the **Finished** button.
 - The ClientData document is displayed.
 - Flick left and right to view the entire document.
20. Close gesture on the ClientData document.
 - You are back to the Notebook: Contents page.

► When speaking with the CFO of a company, the question whether to lease equipment is an important one. This application shows the series of calculations and concerns that enter into such a decision.

► Show that the Present Value of rent is being calculated as you go.

► Assume that the CFO is knowledgeable about the factors going into the decision.

► The Bottom Line document shows the Present Value advantage of leasing (see the red amount).

► The calculations are dynamic: Both the PV advantage number (in red) and the graph update immediately.

► This shows how the calculations are made.

► This shows that three factors enter into the decision.

► The minimum sale price at the end of the useful life (5 years) that the company would require in order to be indifferent about leasing is shown at the bottom, both as dollars, and as a percentage of the purchase price. A typical 5-year selling value is under 10% of the purchase price, showing that, in this case, leasing is preferable.

► This shows that all the data was captured in the background, ready for transmission to the home office.

TravelMedicalQuote

1. Tap the **TravelMedicalQuote** document title in the Financial Services section of the Notebook: Contents page.
 - A list of names (Address List) is displayed floating on top of the TravelMedicalQuote document.
2. Tap any name shown.
3. Tap any box shown (for number of travelers and children).
4. Tap any box related to ages.
5. Enter any date in the future in the form:
 - Day, Month, Year [Note: *not* Month, Day, Year]
6. Enter any date less than 30 days after the previous date.
 - *Policies are only issued for up to 30 days of vacation.*
 - *If a Premium is not calculated, double-check your dates.*
7. Tap the **Issue Policy?** button.
8. Tap **Yes**.
 - The Exclusions (from coverage) document is displayed.
 - *The underlying rate sheet is automatically updated when orders are transmitted.*
 - *The need to show what is excluded from coverage is a matter of statutory regulation in many states. This application enforces that this is shown to the client before closing the transaction.*
9. Tap the **See Invoice** button.
 - The Invoice document is displayed.
 - *The invoice is generated from the data, and can be transmitted as is to the head office for acceptance of coverage.*
10. Close gesture (?) on the Invoice document.
11. Close gesture on the TravelMedicalQuote document.

FleetServices

NOTE: Do not go directly to this document; you must go through the Day Planner (the document is hard coded to open with Richard Kavanagh's name and address already filled in).

1. Tap the **Day Planner** tab.
2. Tap the Tuesday tab at the bottom of the Day Planner.
3. Double-tap on **Richard Kavanagh** in the Day Planner.
 - The personal profile sheet for this client is displayed.
 - *An appointment may have already been set up by the head office call center and downloaded to this agent's Day Planner.*
4. Review the Kavanagh personal profile.
 - Flick up (!), beginning in the profile title bar, to maximize the profile sheet and make it easier to review.
 - *Review information that is already known about this client.*
5. Double-tap the name **Andy's Trucking Company I...** on the Kavanagh personal profile.
 - The Andy's Trucking company profile is displayed.
 - *Review information that is already known about this company.*
6. Review the Andy's Trucking profile.
7. Close gesture (?) on the company profile sheet.
 - Be sure to begin the close gesture in the title bar.
8. Tap on the document icon in the middle of the Kavanagh personal profile sheet, under the Andy's Trucking address and to the right of Notes.

9. Tap on **Sept 22nd Discovery Letter**.
 - The letter is displayed.
10. Close gesture on the letter.
11. Close gesture on the Kavanagh personal profile sheet.
 - Be sure to begin the close gesture in the title bar.
12. Tap on the **FleetServices** notebook tab.
 - The FleetServices page is displayed.
13. Tap **Maintenance Management Program** button.
 - The Maintenance Management document is displayed.
14. Close gesture on the Maintenance Management document.
15. Tap the **Fleet Administration** button.
 - The FleetAdmin document is displayed.
16. Tap the **Fleet Tools** button.
 - The Fleet Tools app document is displayed.
17. Tap the **Customer Needs** button.
18. Tap **Paper-based system**.
19. Tap **Sometimes**.
20. Tap **Some difficulty**.
21. Tap **A lot of time**.
22. Tap **No**.
 - *Note the expressed need to centrally administer registrations, and to avoid fees and penalties.*
 - *These first steps would be done before the agent meets with the client.*
 - *This shows the level of detail of information that is available to an agent when in front of a client.*
 - *Recall that this was the main point raised during the discovery process.*
 - *The Fleet Tools app document initially has a large blank area in the middle. This area will be populated according to the answers to the questions asked about the customer's needs.*
23. Tap the **Administrator Tool** button.
24. Tap the **OK** button.
25. Tap the **WorkBench** button.
26. Tap the **OK** button.
27. Tap the **OK** button.
 - The Late Reg report document is displayed.
28. Tap the **What if...?** button.
 - A small ROI document is floated on the Late Reg report.
29. Tap the choice arrowhead.
30. Tap **NJ**.
31. Tap the **Calculate** button.
 - The table under Cost of missing registration deadline and the Total are automatically calculated and filled in.
32. Close gesture on the ROI document.
33. Close gesture on the Late Reg report document.
34. Tap the **Questions** button.
35. Tap any answer.
36. Tap the **OK** button.
37. Tap any answer.
38. Tap the **OK** button.
39. Tap any answer.
 - *This shows the various tools that would fit the needs of the customer as described by the answers to the questions.*
 - *Again, this shows the detailed information available.*
 - *Recall the client's needs from the discovery letter.*
 - *Get a sample report of registration expiration dates.*
 - *This shows that (hypothetically) missing registration deadlines in New Jersey for those periods would cost an amount that could pay for the entire administrative toolset.*
 - *These are typical questions that might be asked by a client.*

40. Tap the **OK** button.
 - Make sure that you have tapped at least 3 question/answer sets.
41. Tap the asterisk (*).
42. Tap the **Summary** button.
 - The Summary document is displayed, which is a letter from Fleet Services to the customer you are meeting with (recall Day Planner and client profile).
43. Close gesture on the letter.
 - The CustomerData page is displayed.
44. Use flick gestures to navigate the CustomerData page.
45. Close gesture on the CustomerData page.
46. Close gesture on the Fleet Tools app page.

► *This letter is a form letter that has been modified according to the choices made during the meeting with the client. All items in blue are those that were discussed with or shown to the client. Notice that Richard Kavanagh's name and address and today's date are already automatically filled in.*

► *This shows that all the data discussed was captured in the background, so that the "voice of the customer" is now ready to be transmitted directly to the home office the next time the agent dials in.*

Relationships

These demos do not have tabs and are not listed in the Notebook: Contents page at all: The only way to get into these demos is through the Day Planner.

1. Tap the **Day Planner** tab.
2. Tap the Tuesday tab at the bottom of the Day Planner.
3. Double-tap on **Wendy McDonald** in the Day Planner.
 - The personal profile sheet for this client is displayed.
4. Review the McDonald personal profile.
 - Flick up (**!**), beginning in the profile title bar, to maximize the profile sheet and make it easier to review.
5. Double-tap the name **NY Bearings Inc** on the McDonald personal profile.
 - The NY Bearings company profile is displayed.
6. Review the NY Bearings profile.
7. Close gesture (**?**) on the company profile sheet.
 - Be sure to begin the close gesture in the title bar.
8. Double-tap the name **NY Press Club** on the McDonald personal profile.
 - The NY Press Club group profile is displayed.
9. Review the NY Press Club profile.
10. Double-tap the name **Jill Mullin** on the NY Press Club group profile.
 - The personal profile sheet for Jill Mullin is displayed.
11. Close gesture on the Mullin personal profile sheet.
 - Be sure to begin the close gesture in the title bar.
12. Close gesture on the NY Press Club group profile sheet.
 - Be sure to begin the close gesture in the title bar.

► *Review information that is already known about this client.*

► *Review information that is already known about this company. The area at the bottom amounts to an opportunity manager.*

► *Review possible networking opportunities, if permission is given by other clients.*

► *These first steps would be done before the agent meets with the client.*

13. Tap on the document icon in the middle of the McDonald personal profile sheet, under Notes.
14. Tap on **Business Events**.
 - A Business Events document with a Circle of Events graphic is displayed that shows business and personal events in an entrepreneur's life. ► *The entrepreneur's life is surrounded by both business and personal events.*
15. Tap the **Coach** button.
 - The same Circle of Events graphic is displayed, but this time the graphic contains more buttons (and the document is called Coached Events). The Employee Package and Personal buttons are highlighted. ► *The Coach button highlights those areas which clients with similar profiles have pursued. The coach has built-in business rules that tell the rep what the client's needs probably are.*

Life Ins Need

16. Tap the **Personal** button.
17. Tap **Family Protection**.
 - The Life Ins Need document is displayed. ► *This is protection provided to the family in the event of some mishap for the entrepreneur — usually in the form of life insurance.*
18. Enter "14" for Linda's age. ► *The children's ages are important to assess the number of years of coverage required.*
19. Enter "12" for Geoffrey's age.
20. Enter "4" for **Yrs to go in College** for both children.
 - **NOTE:** If you make any errors entering data, use the scratch-out (3) delete gesture and start over. ► *Both children will have 4 years of college requiring funding. Note that **Additional Insurance Required** changes to accommodate the years in college.*
21. Enter "6000" for **Monthly Income Needed**. ► *Monthly spending is estimated at around \$6,000.*
22. Enter "10" for **Years**.
 - **NOTE:** The only values you can enter are 5, 10, 15, and 20. ► *Given Geoff's age of 12, another 10 years of support are needed.*
23. Enter "70,000" for **Uninsured Debt Amount**. ► *An unsecured line of credit taken out before the business started.*
24. Enter "100,000" for **Whole Life**.
25. Enter "100,000" for **Term Life**.
26. Enter "200,000" for **Ret.Svgs** (retirement savings).
 - Note: You may get a different number here if you did not exit this demo properly the last time you ran it, even if this particular form appears to be filled out correctly. Be sure to follow this script. ► *The result is that, in the event of the entrepreneur's death, the money available to fund her children's growing up and college, after paying back the unsecured loan, is \$344,000 short. That is how much additional life insurance is needed.*
27. Close gesture on the Life Ins Need document to go back to the Circle of Events graphic (Coached Events document).

Investor Info

28. Tap the **Personal** button.
29. Tap **Retirement Savings**.
 - The Investor Info document is displayed. ► *At the same time, the client may be concerned that she is not saving enough for her eventual retirement.*
 - *Note that the existing information on Wendy is carried forward.*
30. Tap the **How much should you contribute?** button.
31. Enter "120,000" for **Current Annual Income**.
 - Change Current Annual Income by overwriting it to show dynamic calculations. ► *Note that the target income at retirement, annual amount required from your retirement savings, and the annual contribution to your retirement savings are dynamically calculated.*
32. Close gesture on the How much Contribution? document. ► *Investment and Income fields have been automatically filled in.*
33. Tap the **Retirement Plan?** choice arrowhead.

34. Tap **Individual Retirement Account**.
35. Tap the **Profile Questions** button.
 - The Questions document is displayed.
36. Tap the **Next** button.
37. Tap the **Next** button.
38. Tap the **Next** button.
39. Tap the **More Info** button on question 8: “Which best matches your expected annual return?”
 - The Annual Returns document is displayed. Note the graph.
40. Tap the **Return** button.
41. Tap the **Next** button.
42. Tap the **Next** button.
 - The Asset Mix document is displayed.
43. Tap the **Original Mix** button (center column heading).
 - The Income & Moderate Growth document is displayed.
44. Tap the **Return** button.
45. Tap the **Recommend** button (first column heading).
 - The Balanced Growth document is displayed.
46. Tap the **Return** button.
47. Enter numbers in the **Personal Mix** column.
 - For example, from top to bottom: 0, 15, 0, 20, 45, 20
48. Tap the **Continue** button on the Asset Mix document.
49. Tap **Your own choice of mix?**
 - The Final Choice document is displayed.
50. Close gesture (?) on the Final Choice document.
 - The Coached Events document displays.
51. Tap **Yes**.
 - The Investor Data document is displayed.
52. Flick left and right to see all of the table.
53. Close gesture on the Investor Data document.

Emp.Bene.Pkg

54. Tap the **Employee Package** button.
 - The Emp.Bene.Pkg document is displayed.

- *Knowing how much to invest may not help Wendy. She also is concerned about how to invest her annual contribution. Assume that she does not know what kind of risk profile she has.*
- *There are 10 short questions which will help determine Wendy’s profile for investing. Assume that Wendy is a very conservative investor of her own money, as she is risking a great deal in her business.*
- *This shows that there is more information available for the agent to use to explain the choices — in this case the kind of annual returns from various scenarios, where, in some years, money is lost (negative return) from more risky investments.*
- *The application now takes all the answers, scores them, and returns 2 different portfolio mixes.*
- *The Original Mix is that portfolio that Wendy’s answers indicated as her preference for risk.*
- *The Recommended mix is that portfolio that we recommend for Wendy. In this case, given her youth and her high salary, a slightly more risky portfolio than she herself indicated.*
- *Assuming that Wendy is not comfortable with the recommended mix, even though she recognizes the need to take a little more risk.*
- *This shows the chosen percentage mix, and the amounts of her annual contribution to be put into each.*
- *From this point, you can explain that, with a family of funds behind each fund type, and the associated performance data, Wendy could even move to making an order. For the sake of this demo, those steps have not been shown.*
- *Show that all of Wendy’s data and preferences have been captured in the background.*
- *Wendy may also have expressed a desire to improve the life coverage of her managers in the group plan.*
- *What follows is a very abbreviated demo of the design of an employee benefits package. This demo skips several of the information-gathering steps that are usual, and only shows Life and Disability coverage.*

55. Tap the **CONTINUE** button.
 - The Company Details document is displayed.
56. Tap the **CONTINUE** button.
 - The Employees document is displayed.
57. Tap the **CONTINUE** button.
 - The Plan Summary document is displayed.
58. Tap the **Short Term Disability** button (column heading).
 - The Short-term Disability document is displayed.
59. Close gesture on the Short-term Disability document.
 - The Plan Summary document is displayed again.
60. Tap the **LIFE** button in the upper right corner.
61. Tap **Set coverage for each class?**
62. Tap **OK**.
63. Tap **Salary multiple**.
64. Tap **2 times**.
65. Tap **Cancel**.
 - The Plan Summary document is displayed again.
66. Tap the **CONTINUE** button on the Plan Summary document.
 - The Quotation document is displayed.
67. Close gesture on the Quotation document.
 - The ClientData document is displayed.
68. Flick left and right to show the range of data captured.
69. Close gesture on the ClientData document.
70. Close gesture on the Coached Events document.

- Assume that this information has been provided by the company, perhaps on a preformatted spreadsheet. The agent can then import the information directly into this application and verify it. Some details of the company are shown. Note that the effective date of coverage has been captured.
- Now the details of the employees are shown. There are 10 employees: 3 managers and 7 staff.
- This is the summary of the existing plan for Life and Disability coverage.
- This shows the detail that lies behind, so that the agent can provide explanations.
- Show the Manager class, and the total coverage currently provided.
- Show the change in coverage.
- Show the quotation reflecting the change in coverage. This quotation uses a rate sheet in the background which can be automatically updated.
- Show that all the data has been captured in the background.

SALES PROCESS

Sales Process ROI

1. Tap on the **Address List** document in the Business Planner section of the Notebook: Contents page.
2. Enter this customer's name, company name, and address.
3. Tap the **Contents** tab in the Notebook: Contents page.
4. Tap on **Sales Process ROI** in the Sales Process section of the Notebook: Contents page.
5. Tap the **New** button.
6. Tap on the name of the customer you just entered.

Survey the customer about what problems they are currently having, and tap to the left of each problem identified by the customer to mark it.

- These first steps would be done before the sales rep meets with the customer.
- Note that the Sales Process ROI document is sharing information with the Address List document.

7. Tap on the text **Too Much Discounting**.
 - A worksheet for this problem is turned to: Impact of high discount rates.
8. Fill out the worksheet.
9. Make changes to the information you just filled out.
10. Tap the **Return** button.

► *Note that commensurate changes are automatically made to other information on the page — notably to the bottom line.*
11. Tap on the text **High No Decision Loss**.

► *Note that values that were entered in the previous worksheet are carried over to this worksheet.*
12. Fill out the worksheet.
 - NOTE: Do not enter a Target NDR that is higher than the Current NDR.
13. Tap on the value to the right of **Bottom Line Impact**.

► *This shows how the computations were done.*

 - The Show Calculation No Decision document is displayed.
 - Each worksheet has this feature.
14. Change some of the values.

► *Any changes that you make here are reflected back on the No Decision Loss page.*
15. Close gesture (?) on the Show Calculation No Decision page.
16. Tap the **Return** button on the High no decision loss page.
17. Tap on **Too Many Sales Calls**.
18. Tap on the graph icon (looks a little bit like a tiny comb field) to the right of **Per Sales Call Cost**.

► *At this point the sales rep might ask the customer, “Are you sure you are considering all the costs of sales?”*

 - A page is turned to that shows a graph of various costs.
19. Close gesture on the graph page.
20. Tap the **Return** button on the Too many sales calls page.
21. Tap **Summary Page**.
 - The Needs Analysis Report document is displayed.
22. Tap **Quotation**.

► *This quotation shows the cost to implement this face-to-face sales application for your sales force.*
23. Close gesture on the Quotation document.
24. Tap the **Return** button on the Needs Analysis Report page.
25. Tap the **Meeting Notes** button.
26. Take some notes about your meeting.
 - Be sure to clear your meeting notes between clients.
27. Close gesture on the Meeting Notes page.
 - Be sure to begin the close gesture in the title bar.
28. Close gesture on the Sales Process ROI page.

SAMPLES

These are the “elevator” demos: One-page demos that can be shown in a minute or two.

Read Me

This is the well known text file on gestures. You could open this to demonstrate TextPaper gestures and inserting text in TextPa-

per. The document is read-only, so any changes you make in it will not be saved.

1. Tap on **Read Me** in the Samples section of the Notebook: Contents page.
2. Use the close page gesture (?) to return to the Contents page.

Loan Calculation

This is a demonstration of FinancePaper: values calculating and displaying dynamically.

1. Tap on **Loan Calculation** in the Samples section of the Notebook: Contents page.
2. Enter a **Principal Amount**.
3. Change the **Principal Amount**, **Interest Rate**, and **Term**.
4. Close gesture (?) on the Loan Calculation document.

► *Note the immediate change in the monthly payment and the two contingent monthly payment increase amounts.*

What's Your Mortgage?

This is similar to the Loan Calculation demo.

1. Tap on **What's Your Mortgage?** in the Samples section of the Notebook: Contents page.
2. Change the loan **Amount** and interest **Rate**.
3. Tap on **Explanation** in the cork margin.
4. Tap the **Prompt me** button.
5. Change the principal amount and tap **OK**.
 - Enter a number less than \$1 million.
6. Change the loan rate and tap **OK**.
 - Enter a reasonable rate number.
7. Tap the **OK** button.
8. Select some rows in the middle of the table, and select Delete Rows from the Design menu.
 - Do not delete the first or last rows in the table.
9. Close gesture (?) on the What's Your Mortgage? document.

► *Note the entire table is recalculated to show how much principal and interest you are paying every month for the life of the loan.*

► *This shows the increase you would need to make in your monthly payment to pay off your loan earlier than 30 years.*

Wheels & Hubs

This is a good place to quickly demonstrate zooming gestures and the ability to get a close up view of a technical diagram.

1. Tap on **Wheels & Hubs** in the Samples section of the Notebook: Contents page.
 - **NOTE:** Be careful how you make your zoom gestures. If the system thinks you made just the circle gesture, you will get an **e-case** error message saying there is no table of contents.
- d Zoom in (sensitive to the size of the circle).
 - c Zoom out (sensitive to the size of the circle).
 - 1 Increase the size of the page contents 10%.

► **NOTE:** Do not flick on this page. Do not go to another page in this document. Stay on this first page.

- 2 Decrease the size of the page contents 10%.
 - W Adjust the page to the width of the screen.
 - H Adjust the page to the height of the screen.
2. Use the close page gesture (?) to return to the Contents page.
 - Be sure to start the close page gesture in the title bar.

NotePaper

This is a piece of NotePaper that you can use to demonstrate taking notes and changing the colors, paper, ink, and writing style, and drawing and manipulating shapes.

1. Tap on **NotePaper** in the Samples section of the Notebook: Contents page.
2. Write some words on the document.
3. Draw a triangle.
4. Tap on the triangle to select it.
5. Edit gesture (()) on one of the graphic anchor boxes.
6. Tap **Triangle**.
7. Circle on one of the anchor boxes again.
8. Tap **Circle**.
9. With the graphic still selected, checkmark (+) inside the anchor boxes.
 - **NOTE:** Do *not* use the menus.
10. Change the options and tap the **Apply** button.
11. Tap on a word to select it.
12. Change the options and tap the **Apply** button.
13. Tap the choice arrowhead at the top of the Options sheet, and tap on **Paper**.
14. Change the options, and tap the **Apply & Close** button.
15. Use the close page gesture (?) to return to the Contents page.
 - Be sure to start the close page gesture in the title bar.

BUSINESS PLANNER

In general, these should not be shown as separate demos, but as part of another demo. Many of the demos described in the remainder of this document begin by going to the Day Planner.

This section discusses some things you may want to show in these tools that may not be mentioned in the other demos.

Address List

Enter a customer name and company name.

Day Planner

1. Tap on the **Day Planner** tab.

2. Demonstrate how to navigate the Day Planner.
3. Schedule an appointment.
4. Show **Notes**; take notes in appointments.
5. Double-tap on a bold name to show a customer profile.

► *The customer information comes from the Address List.*

► *The sales rep can review this before a call.*

Month Planner

Demonstrate how to navigate the Month Planner.

SUPPORT DOCUMENTS

Do not open this section, and do not have it open.