

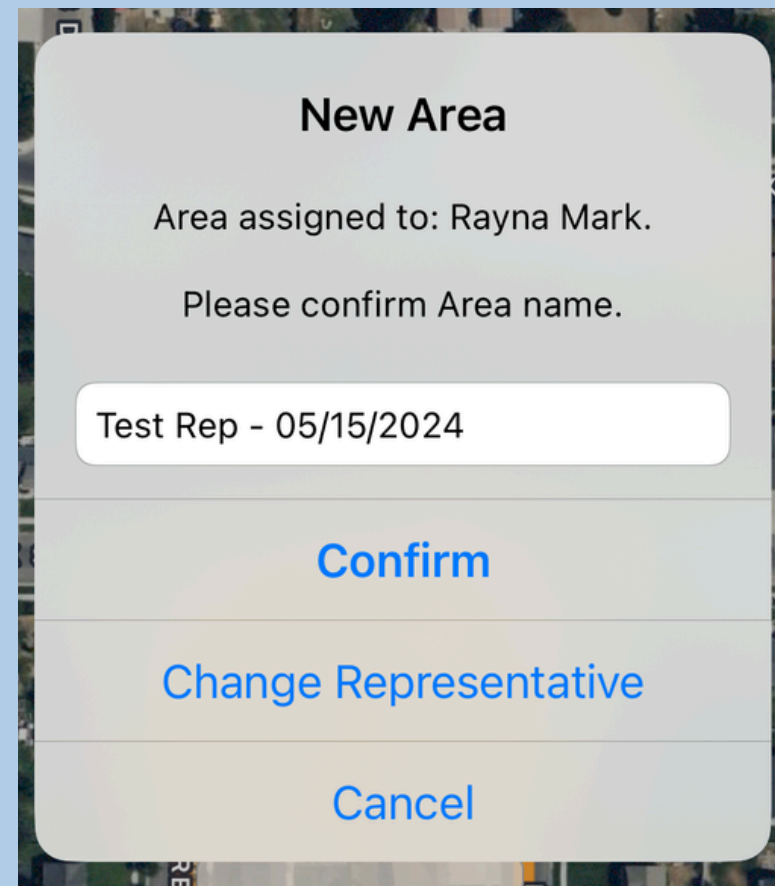
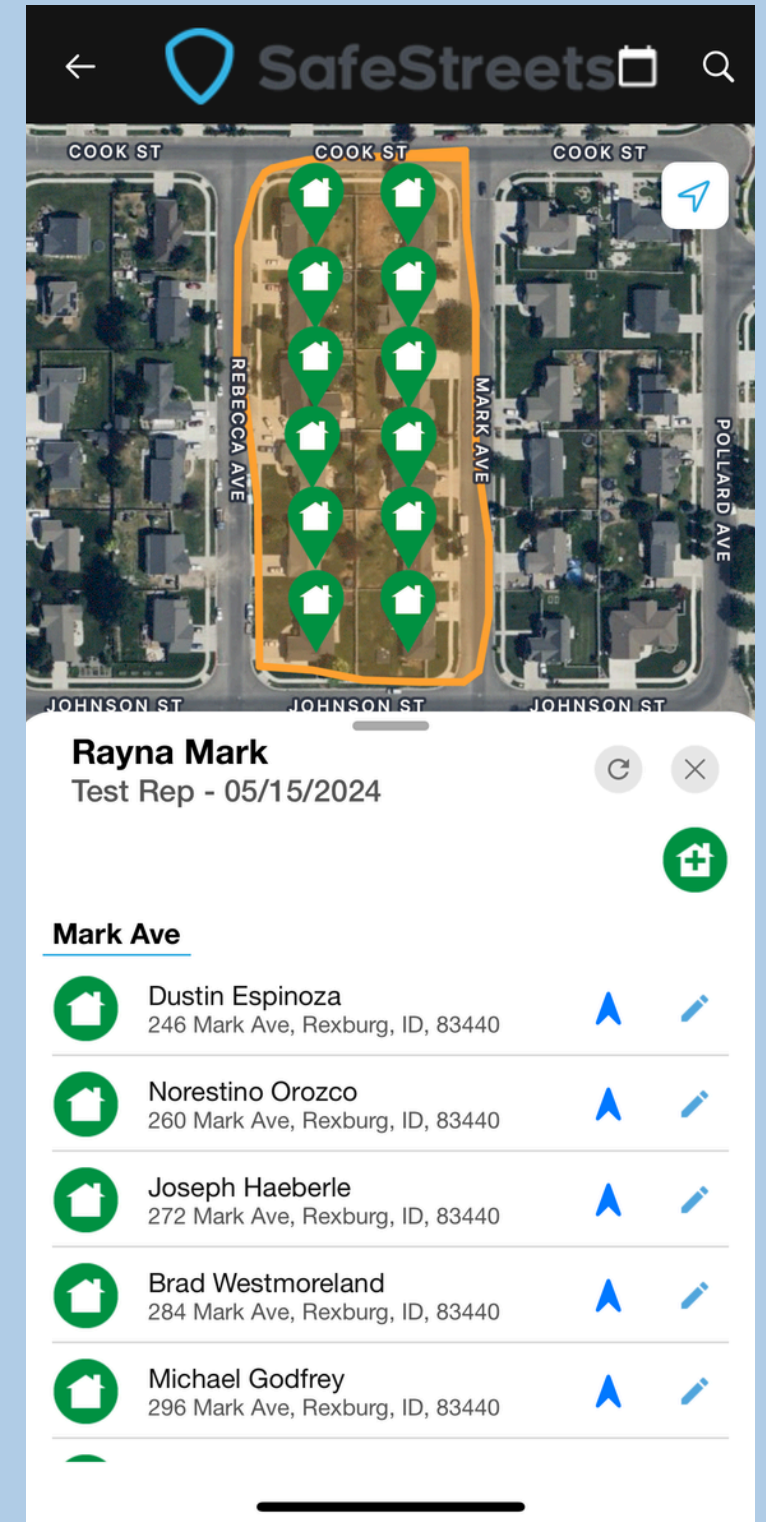
Area Management

IOS App



01

If a user is listed as an Area Manager within CoPilot they have the ability to designate areas for reps to keep track of which houses they've knocked/sold.

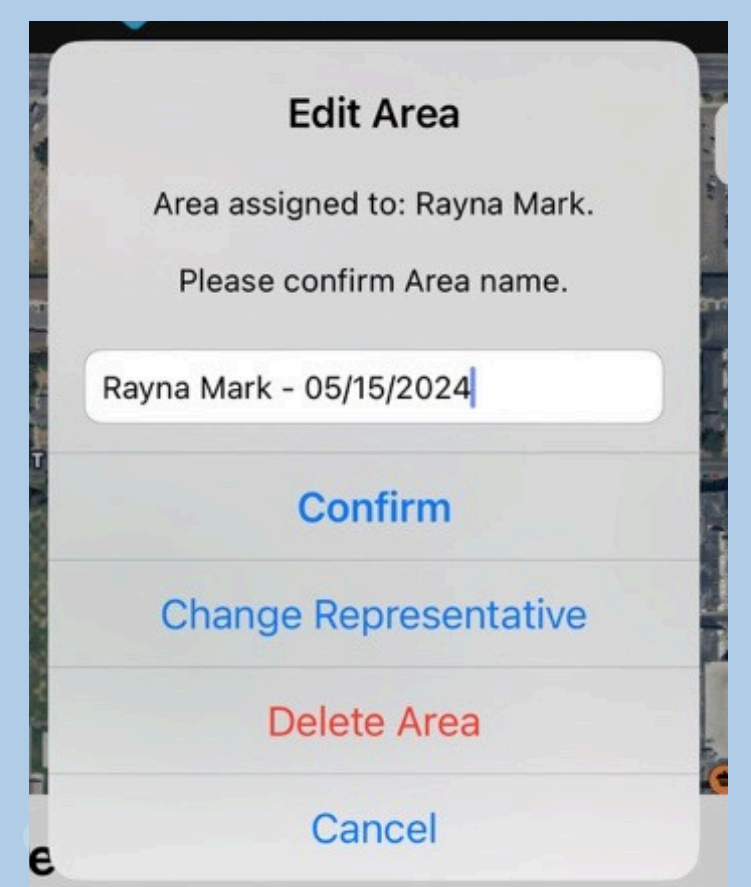
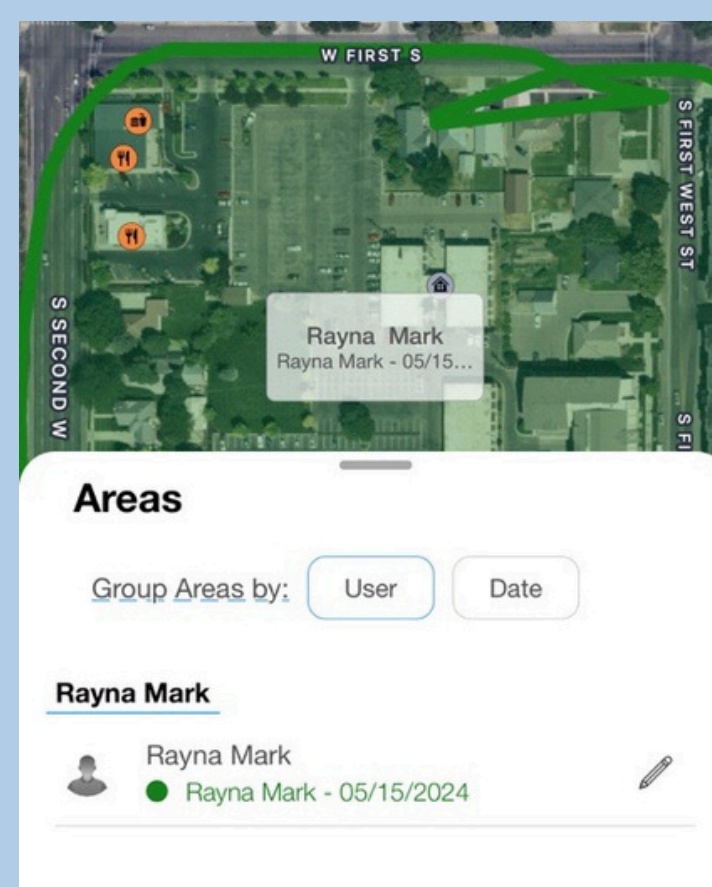


03

The rep will see their area and be able to select a disposition for each house that they've knocked and add any applicable notes to review afterwards.

Within the map, draw/highlight the houses that you would like to assign to a specific rep and name the area.

02



05

Some of the disposition options include:

- Visited
- Not Interested, No Presentation/Presentation
- Callback
- Not Qualified
- ADT - Existing Customer
- Can't Knock
- Do Not Contact
- Solo Sale
- Go Back

To delete an area click on the area, the edit button, and then select Delete Area. The rep and manager will no longer be able to see the area and previous notes

04