INTEMPT ACADEMY

In your pocket

The 19 steps to run your workspace from your phone, from signing in to replying to a customer. Tick them off as you go.

☐ 1.	Sign in or sign up with Continue with Google, Continue with Apple, or your work email and the 6-digit code (expires in 5 minutes). Use the same account as the console.	Lesson 12.4
☐ 2.	If your organization requires it, enter your authenticator code on Two-Factor Authentication and tap Verify.	Lesson 12.4
☐ 3.	Run onboarding once: swipe the walkthrough (Continue, Skip, Let's Go), choose Enable Notifications or Not now on Stay in the loop, enter your domain and tap Create workspace, then tap Let's get started! on your brand intel.	Lesson 12.4
☐ 4.	On Home, switch between the Sales, Marketing and Analytics product tabs.	Lesson 12.1
☐ 5.	Read the bottom tab bar: Home plus up to three pinned sections (Users, Accounts, Deals by default) and the ••• button that opens the full 11-section menu.	Lesson 12.1
☐ 6.	From •••, tap the eye icon to pin or unpin sections (three at most), then check the bar changed.	Lesson 12.1
☐ 7.	Open Accounts, open an account and scroll its Overview, Activity, Users and Deals tabs; create one with Account Name and Domain if needed.	Lesson 12.5
☐ 8.	Open Deals, change one deal's Deal stage, and confirm it moved in the web console.	Lesson 12.5
☐ 9.	Go account to user and user back to account using the linked records (user tabs: Overview, Activity, Tasks, Emails).	Lesson 12.5
☐ 10.	Create a task with Task title, Associated with user and the Deal it belongs to, then find it in Tasks still linked.	Lesson 12.5
☐ 11.	On Meetings tap +, then Record Meeting; allow the microphone, use Pause and Resume, then tap End call and confirm End meeting.	Lesson 12.6
☐ 12.	For a call on a link, tap +, then Capture Meeting, paste a Google Meet, Zoom or Teams link, and tap Start Capturing.	Lesson 12.6

- [ ] 13. For a file you already have, tap +, then Upload Audio, pick an MP3, WAV, M4A, OGG or FLAC up to 500 MB, and tap Upload & Transcribe. Lesson 12.6
- [ ] 14. With Analytics selected on Home, open the dashboard selector and check Traffic, Revenue and Engagement. Lesson 12.7
- [ ] 15. From •••, open Dashboards and a saved dashboard, then Reports, and compare one chart to the console. Lesson 12.7
- [ ] 16. From •••, open Journeys, change the view selector or filter, and open one to its status, Overview and Analytics tabs. Lesson 12.8
- [ ] 17. From •••, open Experiences, open one, use the footer Start, Pause, Resume or Stop button and confirm, then check the same status in the console. Lesson 12.8
- [ ] 18. Under Users open a contact, go to the Emails tab, open a thread, tap Reply with Blu, edit the draft, and tap Send Reply. Lesson 12.9
- [ ] 19. Open Settings and set Appearance, Language & Region and Notifications (Scheduled meetings, Auto-detected meetings, Meeting reminder). Lesson 12.9

YOU ARE DONE WHEN

- The same organization and project name show in the web console and on the phone.
- The deal stage you changed on the phone shows moved in the web console.
- The task you created appears in Tasks still linked to its user and deal.
- The recording you made, captured or uploaded appears in the meeting list.
- A saved dashboard on the phone matches the same one in the console.
- The experience status you changed on the phone shows the same in the console.
- Your reply appears on the contact record.

CORE STACK

- **Intempt mobile app (iOS and Android, waitlist)** This is the app itself. It is in App Store review, so join the waitlist to get it first

OPTIONAL UPGRADES

- **Mobile Settings & Customization** This is how you pick your tabs and switch workspaces
- **Viewing Experiences on Mobile** This is what each button does before you press it
- **Email Drafting & Reply Generation with Blu** This is how Blu writes your replies. Connect Gmail first
- **Setting Up Call Recording** This is how you choose when the notetaker joins your calls