

LEAP SOFTWARE WORKSHOP

MASTERING LEAP PRO

JUNE 2021 AGENDA

ENTERING CLIENT DATA

- Navigating the Questionnaire
- Invite Client to the Client Portal
- Creating a Present Position
- Cash Flow Analysis
- Master Report
- Resource Identification
- Task List
- Collaborate With Other Leap Professionals

DESIGN CENTER & CALCULATORS

- Navigation Overview
- How to Build a Case
- Creating Design Analysis
 - Creating Scenarios
 - Uploading Illustrations
- Design Center Best Practices
- When & How to Use Calculators
- Using Calculators in Front of a Client
- Printing Calculators
- Saving Calculator Data & Story Manager

