



MobileAssistant™

Talk, Don't Type

Getting Started

1. Download our mobile app **Talk It**



(or call our dictation hotline 608-831-3015)

2. Press record to begin your dictation. Speak & spell the contact name, then speak your *notes*.

OR

Click the **Assistant** at the bottom of the screen, then choose or create a template to *guide* you through the dictation process.

3. Within 8 business hours, your *notes* will be professionally typed & delivered by email and to the Notes section for the contact in the Wealthbox CRM.

Pro Tip: If you would like your dictation delivered as a Task in Wealthbox, you **MUST** say "make this a Task" at the beginning of your dictation.

Meet your new **Assistant**

Designed to help *guide* you to record
what matters most



To access your account online visit
www.mobileassistant.us

Contact us | support@mobileassistant.us | 888-373-1916