

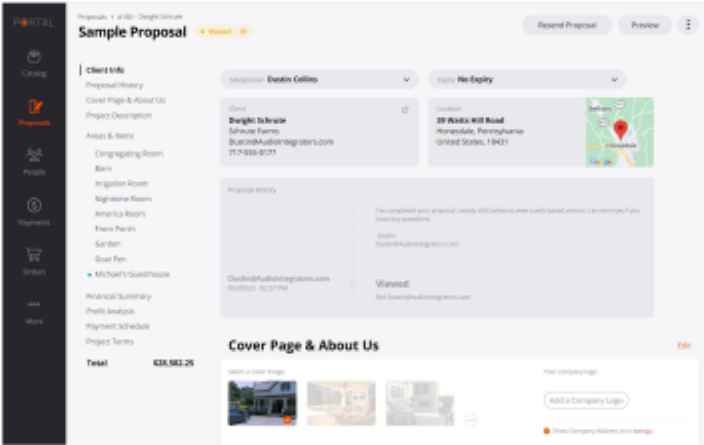
Stage 1

Sales Rep
Builds
Contact



Stage 2

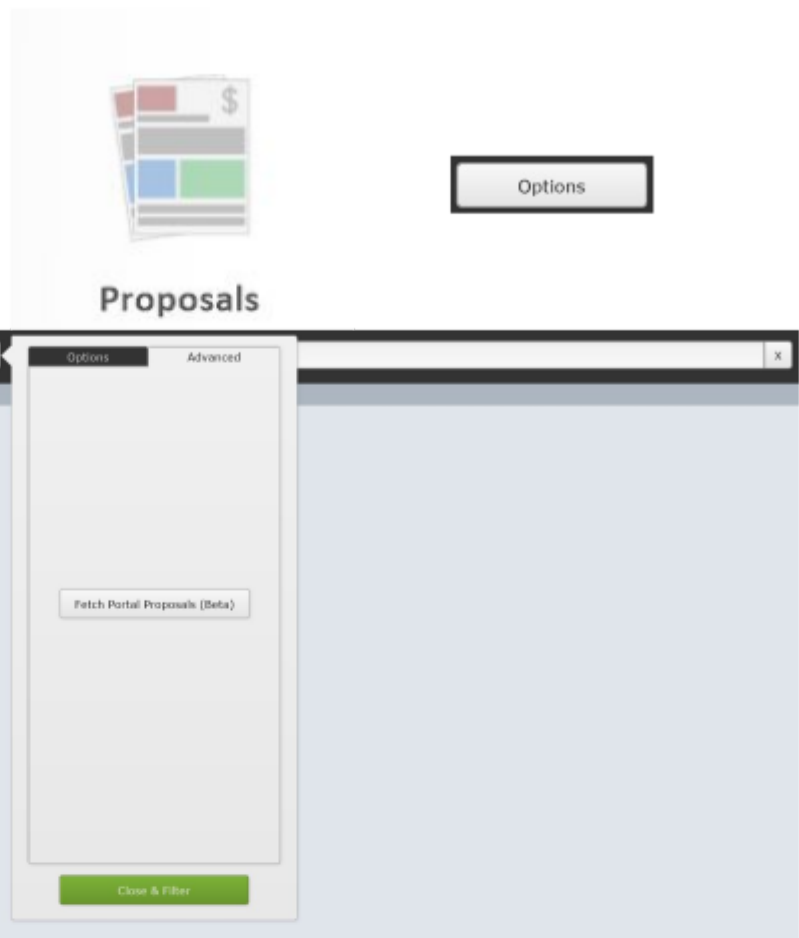
Sales Rep
Builds
Proposal



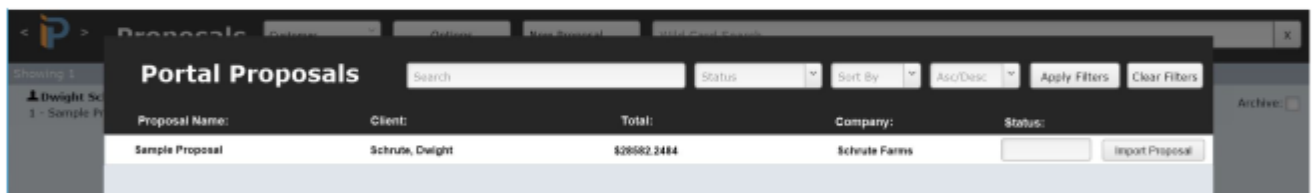
Stage 3.1

Fetch
Portal
Proposal

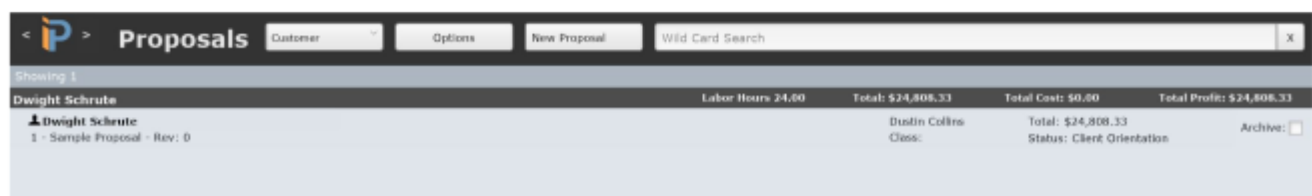
—



Fetch Portal Proposal -
iPoint > Proposals > Options > Fetch Portal Proposals (Beta)



Import Proposal



Stage 3.2.1

Complete
iPoint
Proposal

—



Proposals

Dwight Schrute

Dwight Schrute

1 - Sample Proposal - Rev: 0

Proposal Info

> Proposals Customer Options New Proposal Wild Card Search X				
Showing 1				
Dwight Schrute				
Dwight Schrute 1 - Sample Proposal - Rev: 0		Labor Hours: 24.00	Total: \$24,808.33	Total Cost: \$0.00
		Dustin Collins Class:	Total: \$24,808.33 Status: Client Orientation	Total Profit: \$24,808.33 Archive: <input type="checkbox"/>

> **Sample Proposal - Revision: 0**
Grand Total: \$26,611.04 - Labor Hours: 24.00

Check In Options Designer

Go to List Ref Number: 1

Proposal Info

Setup

Revisions

Reports

Docs / Assignments

Time

Customer Name { Bill To }

Proposal Address Name

Purchase Order

Next Install Date

Optional Related Customer

Optional Ship To Address

Tax Rate

Tax Code Override

Tax Code Override

Created: DCollins on 5/11/2023 10:45:28 AM

Modified: DCollins on 5/12/2023 10:14:24 AM

Proposal Name

Sales Rep

Project Manager

Technical Designer

Proposal Class

Proposal Type

Proposal Status

Next Due Date

Expected Close Date

Client Submitted Date

Convert to Sales Order

Parts Amount

Bulk Qty

Phases

Labor Time

Global Modifier 1 Title:

☒

Print

Global Modifier 2 Title:

☒

Print

Margin Override Title:

☒

Print

Misc. Parts Title:

☒

☒

Project Management Title:

☒

☒

Custom Modifier 1 Title:

☒

☒

Custom Modifier 2 Title:

☒

☒

Discount 1 Title:

☒

☒

Discount 2 Title:

☒

☒

Created: DCollins on 5/11/2023 10:45:28 AM
Modified: DCollins on 5/12/2023 10:14:24 AM

Complete iPoint Proposal -
iPoint > Proposals > Select Proposal > Proposal Tabs

> **Sample Proposal - Revision: 0**
Grand Total: \$26,611.04 - Labor Hours: 24.00

Check In Options Designer

Go to List Ref Number: 1

Proposal Info

Setup

Revisions

Reports

Docs / Assignments

Time



Stage 3.2.2

Scope
Of
Service

—




Proposals

Dwight Schrute
Dwight Schrute
1 - Sample Proposal - Rev: 0

Setup

Description of Work Performed

<  > **Sample Proposal - Revision: 0** Check In Options Designer
Grand Total: \$26,611.04 - Labor Hours: 24.00 Ref Number: 1

Proposal Info	Setup	Revisions	Reports	Docs / Assignments	Time
Custom Data List	Locations	Groups	Description of Work Performed		Cover Page Image

Scope Of Service

Scope of Service Snippet 1
This is a snippet of text that can be added to the proposal scope of service agreement.

Scope of Service Snippet 2
This is a snippet describing a second scope of work.

Preview

Snippets

← Scope of Service Snippet 1	Sort #
← Scope of Service Snippet 2	Sort #

Edit Snippets

Edit Snippets

Scope of Service -


iPoint > Proposals > Select Proposal > Setup > Description of Work Performed

Stage 3.2.3

Custom
Cover Page
Image

—




<  > **Sample Proposal - Revision: 0**
Grand Total: \$26,611.04 - Labor Hours: 24.00

Check In Options Designer

Ref Number:

Proposal Info	Setup	Revisions	Reports	Docs / Assignments	Time
Custom Data List	Locations	Groups	Description of Work Performed	Cover Page Image	

Add a custom Cover Page image here. Image size should be 7.5" wide X 5" tall



Note: If your template uses a Full Screen Cover Page image. This image will appear on top of the upper portion of the full screen image.

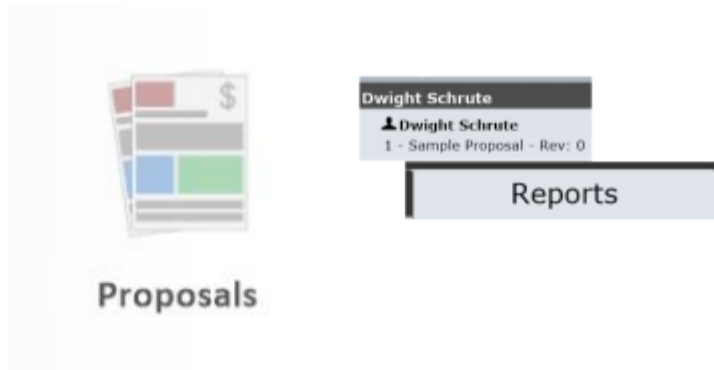


Cover Page Image -
iPoint > Proposals > Select Proposal > Setup > Cover Page Image

Right Click > Insert Image

Stage 3.3.1

Create
Proposal
Package



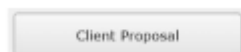
The screenshot shows the iPoint software interface. At the top, it says 'Sample Proposal - Revision: 0' with a 'Grand Total: \$26,611.04 - Labor Hours: 24.00'. There are buttons for 'Check In', 'Options', and 'Designer'. A 'Ref Number: 1' field is also present. Below this is a navigation bar with tabs: 'Proposal Info', 'Setup', 'Revisions', 'Reports', 'Docs / Assignments', and 'Time'. The 'Reports' tab is selected. On the left, under 'Client Reports', there are buttons for 'Client Proposal', 'Picture Book', 'Cover Page', 'Group Summary', and 'Description of Work Performed'. Below these are 'Management Reports' buttons: 'Labor Hours', 'Profit & Loss', 'Product List', 'Profit By Product', 'Retail By Product', and 'Profit Analysis'. On the right, under 'Contract', there are dropdown menus for 'Select Override Template' (iPoint Sample Extra Details), 'Select Override Payment Schedule' (50/50 Payment Schedule), and 'Select Override Contract Language' (CONTRACT 1). There is a 'View Contract' button. Below these is a table with columns: 'Payment Description', '%', 'Amount', and 'Due Date'. The table has two rows: '1 Deposit' with 50.00% and \$13,305.52, and '2 Due Upon Completion' with 50.00% and \$13,305.52. There is an 'Invoice' button next to the second row. At the bottom, there is a 'Contract Grand Total' section with a '0%' field and a '100%' field, both with corresponding amount fields (\$26,611.04).

(a)

Confirm Payment Schedule - Proposals > Select Proposal > Reports

(b)

Create Proposal Package -
iPoint > Proposals > Select Proposal > Reports > Client Proposal



(c)

Request For Payment - Proposals > Select Proposal > Reports



Stage 3.3.1b

Create
Proposal
Package

—

Proposals

Dwight Schrute

Dwight Schrute

1 - Sample Proposal - Rev: 0

Reports

Client Proposal

< P > Options

Congregating Room	Total:	\$5,910.76
While hosting rehearsal dinners that turn into secret weddings, or training temps to be sales superheroes, these outdoor speakers will rock the bars. We'll extend the network from the house to the bars with the Echo access points.		
Bar	Total:	\$1,996.86
Guests can enjoy their favorite tunes on Sonos. Full control of the volume from the app on their phone will help drown out any unwanted voices from outside... or inside the house.		
Irrigation Room	Total:	\$1,543.60
Guests in the Nighttime themed room can fall asleep to the quiet sound of their favorite playlist, or listen to white noise on the amazing Sonos speaker.		

Options

Template & Sorting

Template: iPoint Sample Extra Details

Hide Locations Show Groups Locations First

Show Phase Condensed

Standard Text Options Layout Options Advanced Filters

Customizations

Show Detailed Summary Show Line Price

Show All Items Show Unit Price

Show Accessory Hide Installed Price

Hide Accessory Prices Hide All Prices

Hide Labor Lines

Export Reports FAQ

View PDF Quick PDF

Save PDF Preview Mode

Email

Save in Docs

E-Signature Version

Save Only

Save & Email Link

Close Details Designer

*

Select Proposal Design Template -
Demo iPoint Sample Extra Details

i

Save Proposal Package To -
Proposal > Docs/Assignments Tab

ii

Send To Customer &
Save Proposal To -
Proposal > Docs/Assignments Tab

Stage 3.3.1b.i

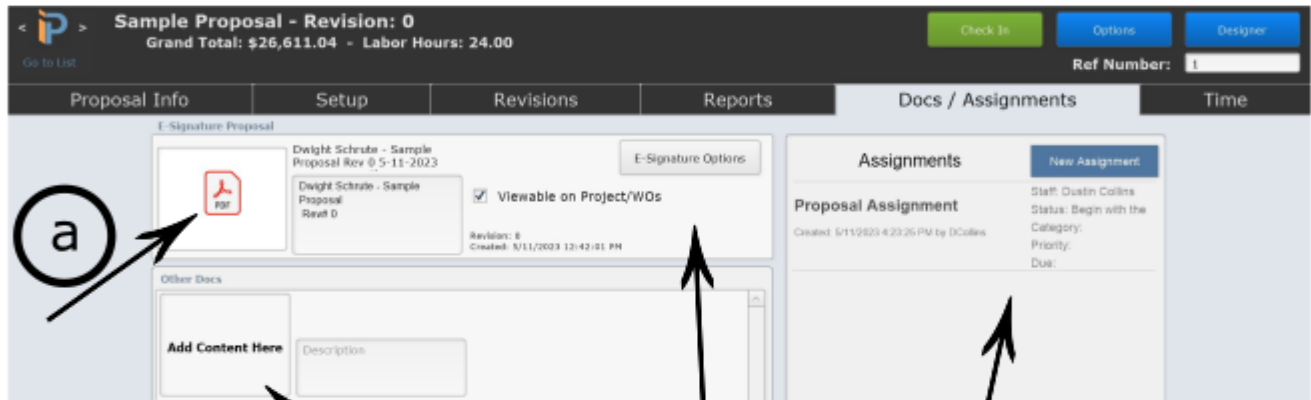
Manage
Proposal
Package

—



Dwight Schrute
Dwight Schrute
1 - Sample Proposal - Rev: 0

Docs / Assignments



a

Right Click For Options -
View / Copy / Export

b

E-Signature Options - Manage Proposal
Submit to Client / Accepted / Declined
Client Comments
Client Signature

c

Create New Proposal Referenced Assignments -

d

Add additional Docs and Media -
Right click > Insert Picture or Insert File

Stage 3.3.1c

Send
Request For
Payment

—

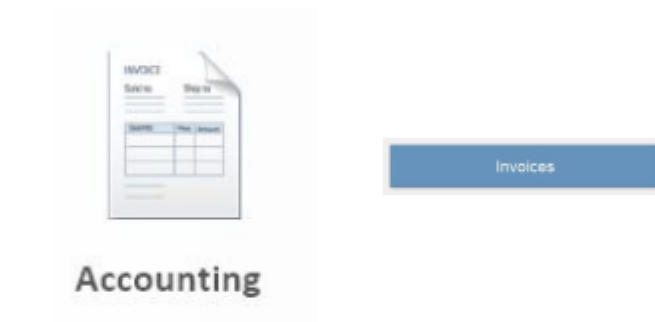


	Payment Description	%	Amount	Due Date	
1	Deposit	50.00%	\$13,305.52		Invoice
2	Due Upon Completion	50.00%	\$13,305.52		

Stage 3.3.1c

Review
Request For
Payment

—



Showing 1 of 1

Item	Description	Quantity	Units	Rate	Amount	Tax
1	Deposit Invoice for Sales Order #5 - Sample Proposal - Revision: 0	1		\$13,305.52	\$13,305.52	
2						

Process Payment or
Manage Payment Status

Payment Add

Add Payment: **Credit Memo** **Process COACH**

5/12/2023

Amount Paid

Payment Method

Check Number

Class

Check Image

Payment Memo

Save & Close

Save & Print

Payments:

Date Applied

Amount

Method

new Payment/Credit

Memo & Signatures

References

Items

Tax Rate

Subtotal

Markup

Tax Code

Sales Tax

Total

Balance Due

Stage 4

Convert
Proposal To
Sales Order

—



< >

Sample Proposal - Revision: 0

Grand Total: \$26,611.04 - Labor Hours: 24.00

Check In

Options

Designer

Ref Number: 1

Proposal Info

Setup

Revisions

Reports

Docs / Assignments

Time

Customer Name (Bill To)

Dwight Schrute

Proposal Address Name

Job Site

Purchase Order

Next Install Date

Optional Related Customer

Optional Ship To Address

Tax Rate

AZ

8.5%

Tax Code Override

Created: DCollins on 5/11/2023 10:45:28 AM

Modified: DCollins on 5/12/2023 10:14:24 AM

Proposal Name

Sample Proposal

Sales Rep

Dustin Collins

Project Manager

Technical Designer

Proposal Class

Proposal Type

Proposal Status

Client Orientation

Next Due Date

Expected Close Date

5/22/2023

Client Submitted Date

Convert to Sales Order

Parts Amount

Bulk Qty

Labor Time

Phases

Global Modifier 1 Title:

%

Print

Global Mod 1

Global Modifier 2 Title:

Global Mod 2

Margin Override Title:

Labor

Parts

Print

Margin Adjustment

Misc Parts Title:

Misc Parts

Project Management Title:

Project Management

Custom Modifier 1 Title:

Custom Mod 1

Custom Modifier 2 Title:

Custom Mod 2

Discount 1 Title:

Discount

Discount 2 Title:

Discount 2



Convert Proposal to Sales Order -
Creates a Sales Order matching the proposal settings.