Contents

[Roles and Responsibilities 4](#_Toc136416414)

[**Sales Rep** 5](#_Toc136416415)

[**Sales Rep Modules** 5](#_Toc136416416)

[**Customer Service** 6](#_Toc136416417)

[**Billing** 6](#_Toc136416418)

[**Billing Modules** 6](#_Toc136416419)

[**Customer Service Modules** 6](#_Toc136416420)

[**Warehouse PO Manager** 7](#_Toc136416421)

[**Warehouse PO Manager Modules** 7](#_Toc136416422)

[**Project Manager** 8](#_Toc136416423)

[**Project Manager Modules** 8](#_Toc136416424)

[**Technician** 9](#_Toc136416425)

[**Technician Modules** 9](#_Toc136416426)

[Proposal/Billing/Project/WO Procedures 10](#_Toc136416427)

[**Stage 1 – Customer Information** 11](#_Toc136416428)

[1.1 Create New Client 11](#_Toc136416429)

[1.2 Find Existing Client 11](#_Toc136416430)

[**Stage 2 –Proposal Information** 11](#_Toc136416431)

[2.1 Create New Proposal 11](#_Toc136416432)

[1.3 Create Proposal Name 11](#_Toc136416433)

[2.3 Select Payment Schedule 11](#_Toc136416434)

[2.4 Project Terms (optional) 11](#_Toc136416435)

[**Stage 3 – Import Portal Proposal into iPoint** 12](#_Toc136416436)

[3.1 Fetch Portal Proposal 12](#_Toc136416437)

[3.2 Complete iPoint Proposal Details 12](#_Toc136416438)

[3.3 Proposal Setup 12](#_Toc136416439)

[3.4 Create E-Signature Proposal Package 12](#_Toc136416440)

[3.5 Create Proposal Assignments 13](#_Toc136416441)

[**Stage 4 – Billing Accepted Invoice Request For Payment** 13](#_Toc136416442)

[4.1 Select the payment schedule and send the initial RFP Invoice 13](#_Toc136416443)

[4.2 Customer Submits payment. 13](#_Toc136416444)

[4.3 Convert Proposal to Sales Order 13](#_Toc136416445)

[**Stage 5 – Create Project** 15](#_Toc136416446)

[5.1 Create iPoint Project from Sales Order 15](#_Toc136416447)

[**Stage 6 – Purchase Request Manager** 16](#_Toc136416448)

[6.1.1 Inventory Preparation – 16](#_Toc136416449)

[6.1.2 Physical Stock Count – 16](#_Toc136416450)

[6.3 Select Items and Create PO by Vendor or Vendor: Project – 16](#_Toc136416451)

[6.4 Purchase Order Details – 16](#_Toc136416452)

[6.5 Submit Purchase Order – 17](#_Toc136416453)

[6.6.1 Purchase Order Confirmation – 17](#_Toc136416454)

[6.6.2 PO Item Backordered – 17](#_Toc136416455)

[6.7 Purchase Order Received –– 17](#_Toc136416456)

[6.2.1 Allocating Products from Global Product Request Manager 18](#_Toc136416457)

[6.2.2 Allocating Products from Sales Order PRM 18](#_Toc136416458)

[6.2.1 Allocating Products That Require a Serial Number 18](#_Toc136416459)

[6.7 Print Item Job Labels – 19](#_Toc136416460)

[6.7 Return Delivered Items from Project/WO – 19](#_Toc136416461)

[6.8 Return Delivered Items from PRM – 19](#_Toc136416462)

[6.9 Permanently Remove Item from SO via PRM – Requires CO Approval 19](#_Toc136416463)

[6.9 Permanently Remove Item from SO via Project/WO – Requires CO Approval 20](#_Toc136416464)

[**Stage 7 – Create Project Work Order** 21](#_Toc136416465)

[7.1 Allocate Parts to Project and Set Task Notes 21](#_Toc136416466)

[7.2 Create WOs 21](#_Toc136416467)

[7.2 Linking Multiple Technician WO’s to the same Project 21](#_Toc136416468)

[**Stage 8 – Technician Work Order Actions** 24](#_Toc136416469)

[8.1 Completing Sales WO 24](#_Toc136416470)

[8.1 Completing Service WO 24](#_Toc136416471)

[8.2 RMA 24](#_Toc136416472)

[8.2 Adding Items 24](#_Toc136416473)

[8.3 Removing Items 24](#_Toc136416474)

[8.3 Adding Misc. Expenses 24](#_Toc136416475)

[8.3 Creating a Service Invoice 24](#_Toc136416476)

[**Customer Notes** 25](#_Toc136416477)

[**Customer: Job Notes** 25](#_Toc136416478)

[**Proposal Docs/Media/Asgmts** 25](#_Toc136416479)

[**Sales Order Docs/Asgmts/Data** 25](#_Toc136416480)

[**Project Notes** 25](#_Toc136416481)

[**WO Notes** 25](#_Toc136416482)

[**Task Notes/Media** 26](#_Toc136416483)

[**Billing Notes** 26](#_Toc136416484)

[**Item Notes** 26](#_Toc136416485)

[**Assignments** 27](#_Toc136416486)

[**Activities** 27](#_Toc136416487)

[**Staff Notifications** 28](#_Toc136416488)

[Sales Rep Notifications 28](#_Toc136416489)

[Billing 28](#_Toc136416490)

[Warehouse PO Notifications 28](#_Toc136416491)

[Project Manager Notifications 28](#_Toc136416492)

[Tech Notifications 28](#_Toc136416493)

[Customer Service Notifications 29](#_Toc136416494)

[Global Notifications 29](#_Toc136416495)

[**Customer Notifications** 29](#_Toc136416496)

[**Contact Notifications** 29](#_Toc136416497)

[iPoint University Beginning Training 32](#_Toc136416498)

[iPoint University Advanced Training 33](#_Toc136416499)

# Roles and Responsibilities

## **Sales Rep**

* Generate Leads and Proposals.
  + Create New Client Profile.
  + Create Proposal in Portal.
    - Create proposal areas in Portal
  + Fetch Portal proposal in iPoint
  + Add Proposal Documents to Proposal
  + Use Designer to Add Sales Notes for Proposal Tasks
  + Verify Expected Proposal Labor Hours
  + Approve/Submit Change Orders
* Understand Client Project Goals
* Describe complimentary products, features, and services that help meet customer goals and expectations.
* Produce Clear project descriptions, sales notes and assignments to Customer Service and Project Managers.

## **Sales Rep Modules**

* Proposals

## **Customer Service**

* 5 Point Communication
  + 1.
  + 2.
  + 3.
  + 4.
  + 5.
* Customer Notification
* Scheduling Moderator
* Assignment / Activity Accountability

## **Billing**

* Verify Time of Service
* Deliver to Client Payment Scheduled Invoices
  + 60:30:10
  + 75:25
  + 100
* Verify Payment of Added Parts and Service – Request CO
* Verify Warranty Conditions – Request RMA
* Review WO Notes
* Accept/Confirm Final Payments

## **Billing Modules**

* Accounting

## **Customer Service Modules**

* CRM
* Assignments
* Calendar
* Reports

## **Warehouse PO Manager**

* Track Asset Locations
* Communicate with Technicians about required Field Item Stock
* Maintain necessary quantities of Non-Inventory Items
* Create POs for field items, accessories, and non-inventory items.
* Identify Accepted SO
  + Create a Project Item Delivery Schedule from Expected arrival Tracking Numbers.
    - Identify ETA of the Last Project Product Arrival
      * Communicate ETA of Last Project Product Arrival to Project Manager

## **Warehouse PO Manager Modules**

* Vendors
* Inventory
* Items
* Purchase Orders

## **Project Manager**

* Review and Complete Project Details
* Project Status
  + Review Project Proposal Completion Date
  + Review Item Delivery Schedule
    - ETA of Last Project Product Arrival
  + Define Next Installation Date
    - Communicate with other PM to Schedule Technicians
  + Create and Schedule Work Orders.
* Communicate with customers regarding changes to scope of service or item delivery schedules.
* Create WO Notes and Descriptions
  + Task Notes
  + Task Lists
  + Punch Lists
* Review Project Work Orders
  + Compare Project Labor Time – Task Completion Time and Expected Project Time Clock
  + Review CO Signatures
  + Review Additional Items or Labor Added
  + Review WO Signatures

## **Project Manager Modules**

* Projects

## **Technician**

* Stage Service Vehicle
  + Asset Allocation - Check out shared assets.
  + Field Items
  + Non-Inventory Items
* Work Orders
  + Clock In
  + Project Product Delivery and Installation
    - Serialized Items – (Note Required)
    - Field Items - Notes
    - Non-Inventory Items – Notes
  + Service Call
    - Field Items – Notes
    - Non-Inventory Items – Notes
    - RMA – Request Notes
  + Clock Out
  + Work Order Status: Complete (Note Required)

## **Technician Modules**

* Autos
* RMA
* Work Orders

# Proposal/Billing/Project/WO Procedures

## **Stage 1 – Customer Information**

### 1.1 Create New Client

1. Select the **People** module in Portal.
2. Click on the **+** tab in the header to create a new contact. (Complete all client Information)

### 1.2 Find Existing Client

1. Select the **People** module in Portal.
2. Search for existing clients in the “Search All People” bar.

## **Stage 2 –Proposal Information**

### 2.1 Create New Proposal

1. Select the **Proposals** module in Portal
2. Assign Client
3. Add Logo, Cover Image, and About US
4. Add a project description.

### 1.3 Create Proposal Name

1. **Click** on **Proposal Name** **to Edit**
   1. {Client} {Job Name} {Proposal Type} – Proposal Name Becomes SO Name and Project Name

2.2 Add proposal Area(s)

1. Click + **Add Area**
2. Add area description.
3. Add parts required for each area.
4. Add labor requirements for each area.

### 2.3 Select Payment Schedule

1. Add payment schedule.
   1. 60:30:10 - 60% Deposit 30% Delivery 10% Completion
   2. 75:25 - 75% Deposit 25% Completion
   3. 100% - 100% Deposit
2. Add Client Description (optional) – This provides additional payment schedule details.

### 2.4 Project Terms (optional)

## **Stage 3 – Import Portal Proposal into iPoint**

### 3.1 Fetch Portal Proposal

1. **Proposals** **Module** > **Options**> **Advanced** > **Fetch Portal Proposals (Beta)**
   1. Fetch Portal Proposals opens a list view of proposals.
      1. Select the proposal to import by clicking **Import Proposal.**

### 3.2 Complete iPoint Proposal Details

1. **Proposal >**
2. **Customer Name**
3. **Proposal Address Name**
4. **Proposal Job Name & Address**
5. **Next Install Date** - If you know when the installation will occur, you can enter the date here. This date will appear on the resulting sales order and projects to aid in scheduling the work.
6. **Tax Rate – AZ 8.5%**
7. **Proposal Name** - the proposal’s name is what distinguishes this proposal from other jobs. Use something meaningful to your customer as it also prints on a variety of sales documents. \* This is a required field.
8. Sales Rep
9. **Project Manager**
10. **Proposal Type** - this optional field helps categorize the type of proposal. Users populate this list as they manually enter a type in this field.
11. **Proposal Status**
12. **Next Due Date** - enter a date for the next customer interaction.
13. **Expected Close Date** - this date lets you know when you expect the customer to decide on the proposal.
14. **Client Submitted Date** – enter the date that the customer received the proposal.

### 3.3 Proposal Setup

1. **Proposal > Setup >**
   1. **Custom Data Lists**
   2. **Locations** – What room is it in.
   3. **Groups** – What Type of System is it
   4. **Description of Work** – Select Appropriate Snippets
   5. Cover Page Image

### 3.4 Create E-Signature Proposal Package

1. **Proposal** > **Reports > Client Proposal**
   1. Click **Options**
      1. **[E-Signature Version]** buttons.
         * **Save Only OR Save & Email**
           1. Chose Package Documents & Order
           2. Continue

## **Stage 4 – Billing Accepted Invoice Request For Payment**

### 4.1 Select the payment schedule and send the initial RFP Invoice

1. **Proposal > Reports > Contract**
2. Select RFP Invoice (Deposit)
   1. Click Invoice
   2. Click **Yes** to create a new Request for Payment.
   3. Select **To Pay Link**
   4. Select **Submitted**
3. **Invoice Options > Submit Request for All Items.**

### 4.2 Customer Submits payment.

1. **Customer Accepts Proposal** and provides RFP payment via link to signature/payment portal.
   1. Proposal Status change from Proposal Delivered to **Proposal Accepted**.

### 4.3 Convert Proposal to Sales Order

1. Open **Proposals** ready for conversion to Sales Order
2. Click the green button “**Convert to Sales Order**”.

## **Stage 5 – Create Project**

### 5.1 Create iPoint Project from Sales Order

1. Select the **Sales Order** for which to create the project
2. Within the Sales Order click On the **Project** tab
3. Clicking Task Options will show the Tasks and Status of the SO.
4. Click on **Go to Project.**
5. Enter Required Project **Info**

* Estimated Project Time
* Estimated Task Time
* Total Time On Site
* Default Labor Phase
* Description and Notes – (this shows in work order notifications)
* Select Customer
* Create Project Name
* Status Phase
* Sales Rep
* Project Manager
* Link to Sales Order
* Mileage Record

1. Enter Required **Milestones**
2. Add New **Assignments**
3. Add **Related Contacts**

## **Stage 6 – Purchase Request Manager**

### 6.1.1 Inventory Preparation –

1. Select **Inventory > Product Request Manager**

### 6.1.2 Physical Stock Count –

1. Select **Inventory > Product Request Manager**

### 6.3 Select Items and Create PO by Vendor or Vendor: Project –

1. Select **Inventory > Product Request Manager**
2. Click **Options**
3. **Filters** 
   1. **Show Only > Show All**
   2. **Summarize By Ven / Man / Part / Due / Line**
4. Select the **Sales Order**for which to create Purchase Order.
5. Select the **Product** tab.
6. Click **Product Manager**.
7. **Select Items** for Purchase Order.
8. Click **Options** Button
   1. **Add**Selected**to Existing PO**    
      or
   2. **Create** **New PO**from the Selected

### 6.4 Purchase Order Details –

1. Select **Purchase Order Module**
2. Select **Purchase Order**
3. Define Details
   1. **PO Number**
   2. **Date Created**
   3. **Vendor and Account Number**
   4. **Status**
   5. **Expected Receive**
   6. **Tracking Number**
   7. **Vendor Free Freight Allowed At**
   8. **Vendor Payment Terms**
   9. **Ship To Address**
4. **PO Line Items – Quantity – Job Reference ( Doesn’t Impact PO )**
   1. Click the **Work Order Button** to View Work Order details.
   2. Click the **Invoice Button** to View Invoice details.
   3. Click the **Sales Order Button** to View Sales Order details.

DO NOT ADD EXTRA QUANTITY TO PO ITEM ASSOCIATED TO A JOB/INV/SO. DOING SO WILL OVER ALLOCATE ITEMS TO THAT SPECIFIC JOB. INSTEAD, ADD ADDITIONAL LINE ITEMS FOR ADDITIONAL STOCK ITEMS.

1. Add **Stock Item** to Purchase Order
   1. **Filter Product Search** with Header Filters
   2. **Add Item and Quantity** to new Item Line
2. Add PO Description
3. Add Internal Notes
4. Add Printed Notes – Prints on the Purchase Orde

### 6.5 Submit Purchase Order –

1. Select **Purchase Order Module**
2. Select **Purchase Order**
3. Click **Options Button** 
   1. **View Purchase Order**
   2. **Email to Vendor**
   3. **Print**
4. The Purchase Order Status has not been Submitted. Would you like to do that now?
   1. No – Sales Order has not been submitted to Vendor.
      1. Mark Yes When Submitted
   2. Yes – Sales Order has been submitted to Vendor.

### 6.6.1 Purchase Order Confirmation –

1. Select **Purchase Order Module**
2. Select **Purchase Order**
3. Fill Purchase Order Details
   1. Carrier
   2. Ship Speed
   3. Expected Receive Date
   4. Tracking Number
      1. Once you enter a carrier and tracking number, you can click track now link for shipping details.

### 6.6.2 PO Item Backordered –

1. Select **Purchase Order Module**
2. Select **Purchase Order**
3. View Purchase Order Line Item
   1. Click the Options Button
      1. Check Back Ordered
         1. Back Order Expected Receive Date
         2. Back Order Notes

### 6.7 Purchase Order Received ––

1. Select **Purchase Order Module**
2. Select **Purchase Order**
3. Process Option 1 – Receive Items One by One
   1. **Click** Line Item **Rec’v Box**
      1. Set **Receiving Location** – Line Item by Project: Areas
         1. Allocates Received **Quantities** to Project Area Product Requests
4. Process Option 2 – Bulk Receive Selected PO Items
   1. **Select PO Items**
   2. Set **Receiving Location**
   3. Click **Receive Selected Lines** Button

### 6.2.1 Allocating Products from Global Product Request Manager

1. Select **Inventory > Product Request Manager**
2. Click **Options**
3. **Filters** 
   1. **Show Only > Needs Ordered**
   2. **Summarize By Ven / Man / Part / Due / Line**
4. **Click the Line Item > Required Number**
5. Choose **Location to Allocate Item From**
   1. **Click Stage** 
      1. Select **Transfer To Location.**
      2. Enter **Quantity**
      3. Click **Save Transfer**

### 6.2.2 Allocating Products from Sales Order PRM

1. Select **Sales Order Module**
2. Select **Product** Tab
   1. Click **Product Manager** – List of all the parts sold for that SO Project.
3. Toggle **Show Stock** if necessary
4. Process Option 1 – Allocate Multiple SO items at a time.
   1. **Select Box of Products** for Allocation
   2. **Options**
   3. **Stock Transfers**
      1. **Select Where to Allocate Too**
      2. **Click Allocate Selected from Stock** for inventory items.

or

* + 1. **Click Allocate Selected Non-Inventory** for Non inventory Items

1. Process Option 2 – Allocate One SO item at a time.
   1. From the SO PRM > Click Item > **Details**
   2. Select **Available Stock** Tab
   3. **Click Apply from Stock**
      1. Select **Transfer To Location**
      2. Enter **Quantity**
      3. Click **Save Transfer**

### 6.2.1 Allocating Products That Require a Serial Number

1. Select **Inventory > Product Request Manager**
2. Identify Item for Allocation
3. **Click on** the Line-Item **Package Icon**
   * 1. Select Available Stock
     2. Choose Location
     3. Click Magnifying Glass or Barcode to Scan Barcode
     4. Click allocate.

### 6.7 Print Item Job Labels –

1. Select **Purchase Order Module**
2. Select **Purchase Order**
3. Select Purchase Order Line Items
   1. Print Labels
      1. Select Sheet or In-Line Labels
         1. Print For - All: Received: or Selected Items

### 6.7 Return Delivered Items from Project/WO –

1. Select **Work Order or Project Module**
2. Select **Work Order or Project**
3. Click **Task/Parts Button**
4. Select **Parts** **Tab**
5. Click on Item to Return
   1. Select Return to Location
   2. Enter Return Quantity
   3. Save Return
   4. Fill Return Memo

### 6.8 Return Delivered Items from PRM –

1. Select **Inventory > Product Request Manager**
2. View PRM Line Items Marked Delivered
3. Click Details Button of Item to return.
   1. Select Inventory Tab
      1. Click Return
      2. Select Return to Location
      3. Enter Return Quantity
      4. Save Return
      5. Fill Return Memo

### 6.9 Permanently Remove Item from SO via PRM – Requires CO Approval

1. Select **Inventory > Product Request Manager**
2. View PRM Line Items Marked Allocated
3. Click Details Button of Item to remove.
   1. Select Inventory Tab
      1. Click Un-Allocate
      2. Transfer to Location
      3. Enter Remove Quantity
      4. Save Remove
         * Stock Removal leaves the Item on the SO
         * Permanent Removal remove the Item from SO via CO

### 6.9 Permanently Remove Item from SO via Project/WO – Requires CO Approval

## **Stage 7 – Create Project Work Order**

### 7.1 Allocate Parts to Project and Set Task Notes

1. Choose a **Project** for which to allocate parts.
2. Click the **Tasks/Parts**button.
3. Select**Parts List**.

* If the part is in stock it can be allocated or delivered.
* If the part is not in stock it must be requested. Click Allocation > Change Requested For Allocation to Yes. This adds the part to the purchase request manager.
* If you try to allocate or deliver a part that is not in stock, you will be prompted to request the item instead.

(note: requested items are added to the purchase request manager – Inventory>purchase request manager)

1. On the **Project Details** screen click on the **Tasks/Parts**button**.**
2. Confirm Task Information, Parts List, and punch list.
3. Add Task specific Notes and Media

### 7.2 Create WOs

1. Choose a **Project** for which to create Work Order.
2. On the **Project Details** screen click on the **Tasks/Parts** button.
3. On the Tasks/Parts screen click the **Create Work Order** button.
4. **Select Tasks** for the work order. (note: if required parts are not staged for work order you will receive a warning.)
5. Assign To Technician. (note: review time to complete.)
6. Confirm WO Details and Status
7. Select Work Order Type
8. Schedule - Start Date / Time – End Date / Time
9. Select Calendar Group
10. Create Work Order With or Without Notifications.

### 7.3 Linking Multiple Technician WO’s to the same Project

1. Choose a **Project** for which to create Work Order.

### 7.4 Return Delivered Items from WO or Project

1. Select **Work Order or Project Module**
2. Select **Work Order or Project**
3. Click **Task/Parts Button**
4. Select **Parts** **Tab**
5. Click on Item to Return
   1. Select Return to Location
   2. Enter Return Quantity
   3. Save Return
   4. Fill Return Memo

## **Stage 8 – Technician Work Order Actions**

## **Service WO - {Job:Name Project: Service YYYY}**

### Clock In to Daily Time Clock

* iPoint Home Page > {Clock In – Hours:}

### Preview Item Tasks & Field Item Stock

* View Daily WO in the Work Orders Module or the Calendar Module
* Review WO Description and Tasks
  + WO Module > Select Work Order > Tasks.
* Check Service Vehicle Field Item Stock
  + Inventory Module > Inventory Dashboard > Reports > Stock Levels in Specific Location > Select Location > Run Report

### Work Order Status En-Rout

* Work Order > Set {Work Order Status: En-Rout}

### Check In to Service WO

* Work Order > Check In
  + Set {Labor Phase: Service}
  + Set the {Work Order Status: Working})
* Make sure you adjust your time entry for 1 hour minimum.

### Complete WO Tasks

* Work Order > Task/Parts > Task List
* Tasks
  + Tasks 1
    - Task Details
      * Set Task Status as Working
      * Review Task Description
      * Punch List > Items To Complete
        + Check of Completed Punch List Items
        + Click Done
      * Enter Task Notes
      * Set Task Status as Completed
  + Repeat for all Scheduled Tasks
    - Task Details
      * Set Task Status
      * Review Task Description
      * Punch List > Items To Complete
        + Check of Completed Punch List Items
        + Click Done
      * Enter Task Notes
      * Mark Task as Completed

### Add Parts

* Work Order > Add & Request Parts
  + + Plus Box to Add Parts
    - Lookup From List > Allocate or Deliver > From Location > Deliver.

### Collect WO Signature from Client

* Work Order > Signature at Bottom of WO
  + Click on Signature Window > Client Signs > Click Accept

### Mark WO Status Billable or Non Billable

* Work Order > Time & Billing > Billable
* If Non Billable
  + Work Order > Work Order Details > Work Order Type > Service-In Warranty
  + Set Work Order Status to Complete
* If Billable
  + Work Order > Work Order Details > Work Order Type > Service-Non Warranty

### If Billable Create Invoice

* Create Invoice
  + Work Order > Invoices
  + Invoice > Memo & Signature > Collect Client Signature

### If Possible Collected Payment

* Collect Payment
  + Work Order > Invoices > Select Invoice > New Payment/Credit
  + Collect Payment
    - Collect Payment Signature
  + Mark Paid In Full
* Set Work Order Status to Complete

### If Unable to Collected Payment

* Set Work Order Status to Job Complete, Needs Billed

## **Sales Project WO - {Job:Name Project: Name}**

### Clock In to Daily Time Clock

* iPoint Home Page > {Clock In – Hours:}

### Preview Tasks

* View Daily WO in the Work Orders Module or the Calendar Module
* Review WO Description and Tasks
  + WO Module > Select Work Order > Tasks.

### Request Un Available Parts for Project Work Order

* Work Order > Parts List (item icon at the bottom of Work Order) >
* Select on Work Order Part
  + Request Details
    - Requested for Allocation {Yes}
    - Required By
    - Request Memo
    - Purchase Notes
    - Done

### Allocate Available Parts to Project Work Order

* Work Order > Parts List (item icon at the bottom of Work Order) >
* Select Work Order Part
  + Click Available Stock
    - Select Item from Available Inventory Location (Warehouse)
    - Select Allocation Location (Staging)
    - Allocate

### Deliver Allocated Parts to SO Project WO Location

* Work Order > Parts List (item icon at the bottom of Work Order) >
* Select Work Order Part
  + Click on Allocated
  + Click on Deliver
  + Deliver

### Check Service Vehicle Field Item Stock

* Check Service Vehicle Field Item Stock
  + Inventory Module > Inventory Dashboard > Reports > Stock Levels in Specific Location > Select Location > Run Report

### Work Order Status En-Rout

* Work Order > Set {Work Order Status: En-Rout}

### Check In to Service WO

* Work Order > Check In
  + Set {Labor Phase: Service}
  + Set the {Work Order Status: Working})
* Make sure you adjust your time entry for 1 hour minimum.

### Complete WO Tasks

* Work Order > Task/Parts > Task List
* Tasks
  + Tasks 1
    - Task Details
      * Set Task Status as Working
      * Review Task Description
      * Punch List > Items To Complete
        + Check of Completed Punch List Items
        + Click Done
      * Enter Task Notes
      * Set Task Status as Completed
  + Repeat for all Scheduled Tasks
    - Task Details
      * Set Task Status
      * Review Task Description
      * Punch List > Items To Complete
        + Check of Completed Punch List Items
        + Click Done
      * Enter Task Notes
      * Mark Task as Completed

### Add Parts

* Work Order > Add & Request Parts
  + + Plus Box to Add Parts
    - Lookup From List > Allocate or Deliver > From Location > Deliver.

### Collect WO Signature from Client

* Work Order > Signature at Bottom of WO
  + Click on Signature Window > Client Signs > Click Accept

### Mark WO Billable or Non Billable

* Work Order > Time & Billing > Billable

### Mark WO Status Complete

* Work Order > Time & Billing > Billable

## **Stage 9 – Project Completions**

### 9.1 Delivery Invoices - Should be created for each Project SO at the end of every month.

* **Sales Order > Billing > Billing Options > All Delivered Invoice**

### 9.2 Project Performance Report

* **Reports > SO Master Summary**

9.3 Archive Completed Module Records

* **Sales Order > Archive Checkbox**
* **Projects > Archive Checkbox**
* **Work Orders > Archive Checkbox**
* **Accounting > Invoices > Archive Checkbox**
* **RMA > Archive Checkbox**

## **Customer Notes**

The CRM > Customer > Notes page is the most comprehensive view for notes in the iPoint system. All notes pertaining to a Customer’s Projects, WO, and WO Tasks will be shown on the Customer Notes.

Stage: 1

Roles of Responsibility: Sales Rep & Customer Service

## **Customer: Job Notes**

The CRM > Customer: Jon > Notes page is the same as the primary Customer Notes Section. All notes pertaining to a Customer: Job Projects, WO, and WO Tasks will be shown on the Customer: Job Notes.

Stage: 1

Roles of Responsibility: Sales Rep & Project Manager

## **Proposal Docs/Media/Asgmts**

Proposals do not have separate notes. Instead there is a Proposal tab that accepts additional documents, media, and proposal referenced assignments.

Stage: 2

Roles of Responsibility: Sales Rep

## **Sales Order Docs/Asgmts/Data**

Sales orders have a Docs/Asgmts/Data page that accepts additional documents, media, and sales order referenced assignments.

Documentation related to Change Orders will also visible in the Sales Order>Docs/Asgmts/Data>Change Order Docs section of the Sales Order.

Stage: 3

Roles of Responsibility: Project Manager & Warehouse PO Manager

## **Project Notes**

The project notes are located in the notes tab in the right column of the project. Notes within the project can be toggled to show Only This Project, or All Client Notes.

Document/Media/Notes that are attached to the related Sales Order will show in the Notes>Sales Order Docs window of the Project

Stage: 6

Roles of Responsibility: Project Manager

## **WO Notes**

Stage: 7

Roles of Responsibility: Project Manager & Technician

## **Task Notes/Media**

Stage: 8

Roles of Responsibility: Technician

## **Billing Notes**

Stage: 9

Roles of Responsibility: Billing & Customer Service

## **Item Notes**

Proposals>Proposal>Designer>Item>Notes

* **Item Sales Notes** – Sales notes created here will Appear in the Project Tasks Created from this product as well.
* **Item Tech Task Description** – Notes for technicians will Appear in the Project Tasks Created from this product as well.

Roles of Responsibility: Warehouse PO Manager

## **Assignments**

* From the Home Screen.
  + If you create an **assignment** from the **Home Screen**, the assignment **will not have Contact Reference**.
* From the Customer Profile.
  + If you create an **assignment** from the **Customer Profile**, the assignment **will have a Contact Reference**.
* From the Proposal.
  + If you create an **assignment** from the **Proposal>Docs/Assignments** tab, the assignment **will have a Proposal Reference.**
* From the Sales Order
  + If you create an **assignment** from the **Sales Order>Docs/Asgmts/Data** tab, the assignment **will have a Sales Order Reference Number.**

## **Activities**

* Schedule Client Meetings with Sales Rep and Project Managers.

## **Staff Notifications**

### Sales Rep Notifications

### Billing

### Warehouse PO Notifications

* **New PO Created**

(PO New at MM/DD/YYYY 12:00:00 AM)

Dustin Collins Created a new Purchase

Order 1 at MM/DD/YYYY 12:00:00 PM

Vender: SO: -Customer:

[Immediate]

{CC: Project Manager}

### Project Manager Notifications

* **Project Note Added**

(Note Added at MM/DD/YYYY 12:00:00 AM)

New Project Note: Created

By: Dustin CollinsCreated On: MM/DD/YYYY 12:00:00 AM

Project : 0 – Dwight Schrute

[Immediate]

{CC: Customer Service}

### Tech Notifications

* **New Work Order Scheduled**

(New Work Order Scheduled)

Work Order Notification: DK-0-Dwight Schrute-?

Project : Home TheaterStart: 5/11/2023 at 12:00 PM

Description: Thi

[10 Min After Appointment]

{CC: Customer Service}

* **Late For Appointment**

(Late for Appointment at 12:00 PM)

You are late to appointment titled DK-0-Dwight Schrute-?

Project: Home Theater scheduled to start today at 12:00 PM

[10 Min After Appointment]

{CC: Customer Service}

### Customer Service Notifications

### Global Notifications

* **Event Reminder**

(Event Reminder: 12:00 PM)

You have an event titled DK-0-Dwight Schrute-?

Project: Home Theater scheduled to start on 5/11/2023 at 12:00 PM

[30 Min Before Appointment]

{CC: Customer Service}

## **Customer Notifications**

## **Contact Notifications**

Select Applicable Global Modifiers

1. Parts Amount - by selecting a percentage here, all parts on the proposal will be increased by the value entered. So, if you have four speakers and you enter 50%, the speakers will be increased to quantity 6. Keep in mind that if you have one television, and you enter 50%, you will end up having 1 1/2 televisions… and we all know that isn’t a likely scenario!
2. Blk Qty - placing a percentage here will increase all *Bulk* parts by the modifier. A bulk part is set up on the item itself by checking the **Bulk** checkbox. Typically bulk products are things like wire, conduit, or flex tubing.  
   Example: You have calculated that the average wire run is 100 feet. You have set up some pre-wire package items that include 100 feet of wire, a box, a plate, plus several inserts. But you are working on a quote for a huge home where the wire runs need to be 175 feet each. Rather than going through every line item in the designer and manually changing the wire lengths from 100 to 175, you could enter a **Bulk Qty** modifier of 75%. And because all of your wire and conduit have been marked as *Bulk*, iPoint will adjust the lengths of the wire and conduit in each of your drops to 175 feet.
3. Phases - placing a percentage here will increase the labor time on labor phases by the percentage entered.
   1. Click the **Phases** button to open the phase pop-up list.
   2. Place a check next to the phases you want to adjust.
   3. Enter a percentage.
   4. iPoint will increase the labor for each of the checked phases by the amount entered. If you chose Finish, Prewire, and Trim, for example, those times would be increased. While the Design & Engineering and Travel phases will not be increased.
4. **Global Modifiers** – you have two amounts that will be calculated across the total design, regardless of parts or labor.
5. **Margin Override** – Entering a percent here will adjust the margin on items listed in the Designer. For example, if you select 10%, the system will change the sales price to include a 10% margin based on each item’s cost. Note that you can assign the margin override to parts and labor separately.
   1. There are two caveats to the margin override:
      1. You cannot change the margin on an item if the price is less than the *Min / Map* of an item as defined on the Item Details screen.
      2. If an item is marked *No Disc.* (no discount) on an Item Details, the system cannot \_ reduce the price of the item\_ by this margin override. It can be increased, however.

Project Created

1. Check for automation to create a project and generate purchase orders upon conversion of the proposal to a sales order. Project Creation happens from the Sales Order>Project Tab

Automated Notification for Purchasing/Project Manager upon creation of purchase order. – Notification Builder. Who do you want to be notified?

Order Products

Receive Products into inventory.

Assign Inventory to the Project. – Add Parts from the Project

Assign Inventory/ Labor/ Tasks to Daily Work Orders - Add Parts from Work Order

Work Orders – Tech Change Orders – Handled by Techs – Notification Builder For CO

Future Automation

1. Tech In Route – Auto notification in advance. Days in advance? 2 Time? 2
2. Closing out WO. No notes not closing work orders. Settings>Work Orders>Require Not when Checking Out of a Work Order. Min Note Length?
3. Notes Notification – Notification Builder. Who do you want to be notified?

Notes & Questions:

Split work order line items between two technicians.

Purchase Orders only for serialized items.

Non-serialized items need to have Modifier Items Created

Assign Equipment to Techs

# iPoint University Beginning Training

Sales

1. Customers
2. Proposals
   1. Designer
   2. Print a Proposal
   3. Revisions
3. Sales Orders
4. Change Orders
5. Commissions

Accounting

1. Service Invoices
2. Invoice Overview
3. Payments

Project Management: Sales Scheduling

1. Requesting Parts
2. Sales Scheduling
3. Change Orders
4. Service Scheduling

Purchasing Manager: Allocating Parts

1. Allocating Parts
2. Purchase Request Manager
3. Purchase Orders
   1. Item Receipts
4. Reassign Parts

Technicians – Work Order: Basic

1. Clocking In and Out for payroll
2. Clocking in and out of a work order
3. Completing Tasks
4. Delivering Parts
5. Capturing Notes and Images
6. Getting the customer’s signature

Technicians – Work Order: Advanced

1. Adding parts to a work order
2. Tracking Expenses
3. Tracking Mileage
4. Creating and completing Assignments

# iPoint University Advanced Training

Proposals:

1. Enhanced Location List
2. Electronic Signatures

Projects

1. Service Contracts
2. Project Milestones

Work Orders

1. iPoint Tech App

Accounting

1. Refunds
2. Gift Cards
3. Recurring Invoices
4. QB Payroll Setup
5. QB Payroll Use
6. Bulk Send Invoices
7. Recurring Invoices: Auto Email & Pay
8. Switch RFP AR to RFP Liability
9. Point of Sale

Assignments

1. Assignments Module

CRM

1. Deals

Items

1. Portal Integration
2. Items Mass Edit
3. Master Packs

Inventory

1. Inventory Prep
2. Physical Inventory

Multi-Site Inventory

1. Multi-Site Inventory

Purchase Orders

1. PO Barcode Scanning

RMA’s

1. RMA Office

Items

1. Portal Integration
2. Items Mass Edit
3. Master Packs

Settings

1. Picture Book
2. Document Builder
3. Slack Configuration

Reports

1. Time Clock
2. Cash Bag Journal
3. Mileage Records
4. Time Summary
5. Work Order Labor Commission
6. Sales Order Commissions
7. Invoice Commissions
8. Asset Tracking
9. Sales Order Summary
10. Sales Order Item Stock Summary
11. Invoice Summary
12. Payment Summary
13. Invoice Item Summary
14. Expense Report
15. Task Report
16. Customer Notes

Auto’s

1. Mileage Log
2. Expense Records
3. Maintenance Records
4. Vehicle Information
5. Maintenance

Time Clock

1. Clocking In and Out
2. Map

Calendar

1. View Options
2. Filters
3. User Settings
4. Google Calander

Marketing

1. Marketing Lists
2. Marketing Templates
3. Marketing Campaign

New Features Dec 2022

1. Item Receipts
2. Serialized Inventory

New Features Dec 2022

1. Portal Integration
2. Items Mass Edit
3. Master Packs

New Features Mar 2021

1. Auto Email and AutoPay Invoices

New Features May 2020

1. Bulk Send Invoices

New Features Nov 2019

1. Service Contracts
2. Item Mass Edit
3. Enhanced Location List
4. QuickBooks OAuth 2
5. Previously Announced
6. iPoint Tech