



## iPoint Quick Start Guide

Use this guide as a reference point to help you know which training manuals & videos are most applicable to you. Below you will see 6 general roles (**sales, technician, project manager, purchasing manager, warehouse manager, and admin**) and the training materials that are most useful to them. The roles are here to help guide you through the training process and aren't necessarily based on your job title. For instance, you may be a sales representative for your company but you also are in charge of purchasing and managing the projects you bring in. In this case you should follow the training guides for the project manager and purchasing manager roles in addition to the sales role. It's most helpful to go through the training materials in the order listed.

### **Sales**

1. Customers Manual and Video
2. Proposals Manual and Video
3. Sales Order Manual and Videos
  1. Watch all Sales Order Videos
4. Invoices Manual and Video
5. Items Manual and Video
6. Calendar Manual and Video
7. RMA Manual and Video
8. Assignments Manual and Video
9. Time Clock Manual and Video

### **Technician**

1. Work Orders Manual and Video
2. Calendar Manual and Video
3. Autos Order Manual and Videos
4. RMA Manual and Video
5. Assignments Manual and Video
6. Time Clock Manual and Video

### **Project Manager**

1. Proposals Manual and Video
2. Sales Order Manual and Videos
  1. Watch all Sales Order Videos
3. Projects Manual and Video
4. Work Orders Manual and Video
5. Invoices Manual and Video
6. Calendar Manual and Video
7. RMA Manual and Video
8. Assignments Manual and Video
9. Reports Manual and Video
10. Time Clock Manual and Video

### **Purchasing Manager**

1. Vendors Manual and Video
2. Items Manual and Video
3. Sales Order Manual and Video
  1. Product Manager Video
4. Purchase Orders Manual and Video
5. Inventory Manual and Video
6. Reports Manual and Video
7. RMA Manual and Video
8. Assignments Manual and Video
9. Time Clock Manual and Video

### **Warehouse Manager**

1. Items Manual and Video
2. Purchase Order Manual and Video
3. Inventory Manual and Video
4. Reports Manual and Video
5. RMA Manual and Video
6. Assignments Manual and Video
7. Time Clock Manual and Video

### **Admin**

The Admin user should have knowledge of all the areas in iPoint and should go through the training materials for all the modules. In addition, they should also focus on the following admin only sections.

1. Settings Module
  1. All Videos - they are separated out so you can focus on one area at a time
2. Importing Items Manual
  1. This walks you through the process of importing new or updating existing products in you Items module from a vendor price sheet.