



Onboarding Guide

iPointSolutions.net (800) 535-4101

Support@iPointSolutions.net

Table of Contents

Server / Hardware / Network Requirements

Server Requirements.....	3
Supported Operating Systems.....	3
Server Hardware Requirements.....	3
Desktop Requirements.....	4
Network Requirements.....	4
Mobile Device Requirements.....	4

Training Opportunities

iPoint University.....	5
Daily Webinar Training.....	5
One-on-One Training.....	5
iPoint Onsite Training.....	6
Meet Your Trainer, Dave Maurer.....	6

Timeline

7 Steps to Becoming an iPoint Ninja.....	7
--	---

Install iPoint

On a Desktop Computer.....	9
On an iOS Device.....	12

System and Hardware Requirements

iPoint is a cloud-based office management system providing access to all your company's information wherever you have an internet connection.

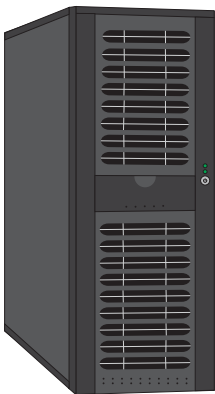


To reduce data transfer latency, we **STRONGLY** recommend that you host iPoint on a server in your office, reducing the distance between your data and your staff.

Server Requirements

All of your data will be housed on your server, which stores all the data, media, and other files needed for your users to access your company's information.

iPoint is based on the FileMaker Pro platform, and as such, has very specific server operating system requirements.



Supported Server Operating Systems

- Windows 10
- Windows Server 2012 R2 Standard
- Windows Server 2012 Essentials (if not using any of the Essentials roles or features)
- Windows Server 2016 Standard Edition (with Desktop Experience)

Not Supported Server Operating Systems

The following operating systems are NOT compatible with the FileMaker Server:

- Windows 7
- Windows Vista
- OS X
- Server 2012 (without R2)
- Server 2012 Essentials (if using any of the Essentials roles or features)
- Windows 8
- Windows XP
- Server Small Business Edition

In some cases, we can deploy a virtual machine, but this is not ideal.

Server Hardware Requirements

- Processor: 3.5 GHz or greater
 - ◆ Intel i5, i7, Xeon E3 or better, AMD Athlon X4, FX (Quad Core, if virtualizing)
- RAM: 8 GB minimum (16 GB, if virtualizing)
- SSD: 1 SSD hard drive of 100GB or larger
- 2nd Drive: any type SSD or Spindle (recommend 500GB or larger)

iPoint Ninja Tip



We prefer no antivirus software be running on your server. However, if you must run antivirus, please exclude iPoint files from virus scans, as this dramatically decreases access speeds to your data.



We **STRONGLY** encourage a stand-alone server to run iPoint as this reduces the potential for software conflicts which can reduce speed and reliability.



Desktop Requirements

The FileMaker Pro desktop application will run on a variety of computer operating systems, including Apple OS X 10.10 Yosemite, OS X 10.11 El Capitan, macOS 10.12 Sierra, and macOS 10.13 High Sierra; Microsoft Windows 7 Service Pack 1, Windows 8.1, and Windows 10.

Network Requirements



In order for your staff members to access the data stored on your server, an internet connection is required. Additionally, there are some network requirements that must be addressed prior to setup and use of the software:

- Ports: 80, 443, 5003, 16000 must be port forwarded (TCP only)
 - ◆ Ports 5003 and 16000 are required by the software
 - ◆ We can use alternate ports for 80 and 443, if necessary
- Nat Loopback needs to be enabled. Nat Loopback is a feature in many consumer routers which permits the access of a service via the public IP address from inside the local network
- Static IP or Dynamic DNS
- WAN Speed: 5MB upload or greater

Mobile Device Requirements

Remote access is available using an Apple iPhone or iPad. Currently, the FileMaker Go application is only available for iOS devices. Due to the FileMaker database size and complexity, only certain devices are recommended.



Recommended iOS Devices

- iPad Air 2
- iPad Mini 4
- iPad Pro
- iPhone 6
- iPhone 7
- iPhone 8
- iPhone X

Additional Mobile Device Information

- The minimum compatible iOS devices are: iPad Mini 2 with Retina, iPad Air, and iPhone SE.
- Older iOS devices are not officially supported.
- We have had some success with Windows tablets as long as they have the ability to run the full FileMaker Pro application and have an active connection to the internet.

iPoint Ninja Tip



iPoint creates documents using the PDF file format. However, Filemaker has a known compatibility issue with older versions of Adobe, which can cause documents to be unreadable and unprintable. This is typically not an issue for the free Adobe Reader, but older professional versions of Adobe have been known to cause issues.



Tablets must have cellular plan or the ability to pair with a wireless hotspot.

Training Opportunities

We provide multiple training options for you and your staff to become experts using the iPoint software.

iPoint University

The iPoint University module is located on the iPoint dashboard. This module provides multiple short videos outlining all the major functionalities in iPoint. You can enroll in classes that are specific to your role in the company, including:

- Billing Manger
- Project Manager
- Purchasing Manager
- QuickBooks
- Sales
- Settings
- Technicians
- Warehouse Manager

Daily Webinar Training

iPoint provides daily online training sessions with specific instruction on various employee roles. These live classes provide the opportunity for Q&A with a knowledgeable instructor and interaction with peers from other companies doing the same job function.

Webinar registration is free at ipointsolutions.net/ipoint-training.

Webinar Schedule

Monday	Tuesday	Wednesday	Thursday	Friday
Proposals & Sales	Project Management & Scheduling	Purchasing & Staging	Billing & Payments	Technicians & Work Orders - OR - Request for Payment Billing

One-on-One Training

Some of you may prefer individualized instruction using your own data. We provide personalized training via web session so you can work in your system with the help of the iPoint training staff. These classes are tailored to the way your company does business and how your processes work within the context of the iPoint software. Call iPoint Support at (800) 535-4101 to schedule a One-on-One Training session today.

iPoint Ninja Tip



One-on-One Training is available to users who have completed the built-in iPoint University training or attended the weekly webinar for your specific role in your company.

iPoint Onsite Training

iPoint offers onsite training opportunities for you and your staff. This training features hands-on work with your staff, your data, and your processes with the intent of integrating iPoint into your daily operations.

Onsite training is typically focused on the following areas

- System Setup (4 - 6 hours)
- Proposals & Sales (2 - 3 hours)
- Project Manager & Scheduling (2 - 3 hours)
- Purchasing & Staging (2 - 3 hours)
- Billing & Receiving (2 - 3 hours)
- Technicians & Work Orders (2 - 3 hours)
- We also offer business process consulting, which is typically at least one full day depending on the topics.

Onsite Training Details

- Cost is \$6,000 for 3 training days and includes travel.
- Additional training days are available at \$1,500 a day.
- Additional travel fees apply outside of the lower 48 states.
- Your company needs to provide the training space.
- Call iPoint Support at least 30 days in advance to schedule an onsite training session.

Typically, Dave arrives in town the night before and joins you first thing the next morning for day one of training. He stays as long as you need, but 3 days is usually adequate, depending on the training your staff requires.

Meet Your Trainer

Training is conducted by Dave Maurer, Director of Training and Support. Dave provides daily training webinars and produces training materials for iPoint, in addition to providing client phone support. Previous to joining the iPoint team, Dave worked for more than a decade at a custom audio video integrator in Portland, Oregon as the Director of Business and Finance. He holds an MBA in Business Management with a technology emphasis.

Dave Maurer

Alias: Grandmaster Dave

Occupation: iPoint Ninja

Based Out Of: Portland, OR

Rank: 1st Echelon Grandmaster

Specialties:

- Webinar Training
- One-on-One Training
- Onsite Training
- Business Management
- Business Process Analysis and Consulting

Characteristics:

Patient, Knowledgeable, Professional, Responsive, Passionate about Teaching



7 Steps to Becoming an iPoint Ninja

Step 1 – Initial Phone Call

Who: An iPoint team member and your project lead

Typical Duration: 30 minutes

- Once your payment is processed, a member of our staff will call you to verify server specifications and network settings.
- We will conduct an initial survey to determine what data will be imported into iPoint from your legacy software.

Step 2 – Server Setup

Who: An iPoint team member

Typical Duration: 15 minutes

- We will configure your server for remote access by our technicians.

Step 3 – Software Installation

Who: An iPoint team member

Typical Duration: 3 – 5 hours

- An iPoint staff member will install the iPoint software on your server.
- We will provide you with instructions on how to install iPoint on your computers, iPhones, and iPads.
- We will train your admin user how to set up new users and provide access to iPoint.
- A member of the iPoint team will walk you through initial settings and setup processes.

Step 4 – Data Acquisition

Who: You and Your Staff

Typical Duration: 1 – 2 days

- You will gather import data (items, customers, and vendors) and graphic images as determined in Step 1 above.
- D-Tools data: If you are exporting your data from D-Tools, please export as an Excel document.
- We have a limited library of manufacturers you can import from. If you have additional manufacturers, please email us their price sheets (.csv format preferred) and we can add them to our library.

Step 5 – iPoint University Training

Who: Each of your staff members

Typical Duration: 4 – 6 hours to view all the training videos for an individual role

- Your users can begin learning the software by watching the iPoint University videos.

Step 5.5 – Data Migration

Who: An iPoint team member

Typical Duration: 1 – 2 business days

- While your team is busy with training and getting familiar with the iPoint software, our staff will begin data migration—importing your legacy data into the iPoint platform.

Step 6 – Training & Ongoing Support

- Our Training team will work with your staff to provide training through webinars and one-on-one training sessions.
- **Daily Phone Calls:** For the first week or so, we will call you nearly every day, just to make sure you have all the information and support you need.
- **Weekly Phone Calls:** After the initial week of setup and training, you will be ready to dig in and get more familiar with the iPoint process. We'll call you on a weekly basis just to make sure things are flowing smoothly.
- **Monthly Phone Calls:** Once the first month is done, we won't bother you as much. But we will check in on a monthly basis to see how things are going.

Step 7 – You Have Become an iPoint Ninja!

- You are live and running your business with the iPoint business solution.
- iPoint support staff continue to work with you through support and additional training, as needed.
- Support is available ANYTIME—you don't have to wait for us to call you! If you ever have an issue or something you can't figure out, our staff is available to help—we're just a call or email away. Call iPoint Support at (800) 535-4101 or email us at support@ipointsolutions.net.

Installing User Devices

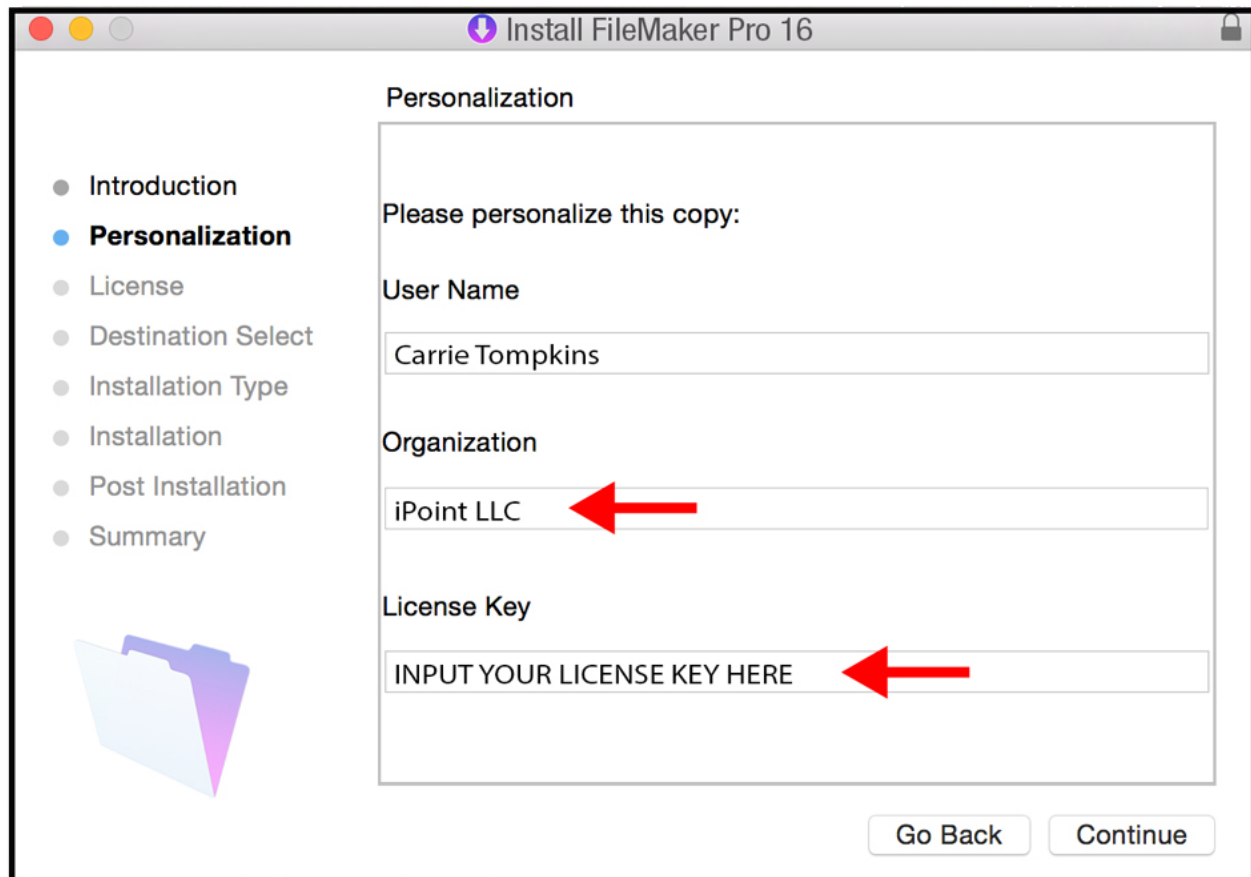
Desktop Computer

This guide will walk you through the process of installing iPoint on your PC or Mac. Before you begin make sure that you have the following:

- Your iPoint user name and password
- FileMaker Pro license key, iPoint server name, and iPoint file name
- Contact iPoint Support for these at support@ipointsolutions.net or (800) 535-4101 ext. 1

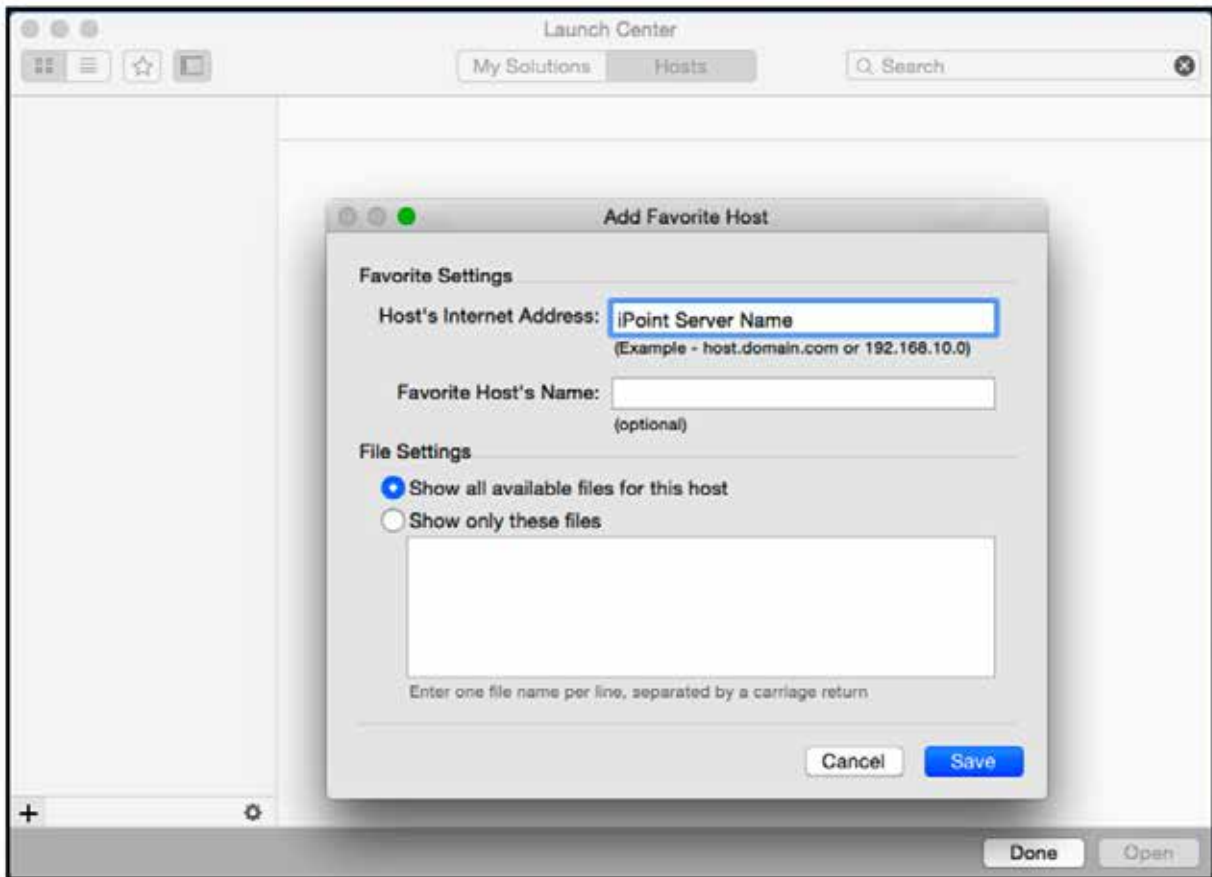
Once you have this information you are ready to begin!

1. Download FileMaker Pro to your computer
 - a. For Mac click [HERE](#)
 - b. For PC click [HERE](#)
2. Run the installer
3. Follow through the prompts and select the default options
4. When it asks for the Organization and License Key enter in:
 - a. Organization: iPoint LLC
 - b. License Key: Call iPoint Support at (800) 535-4101

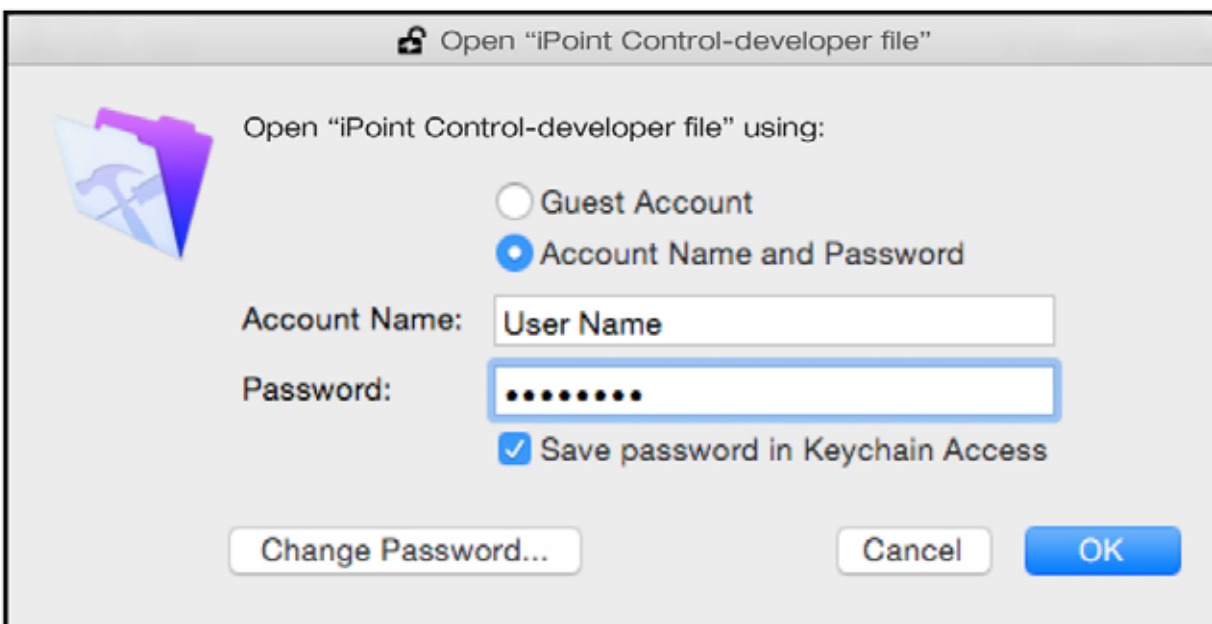


5. Continue through the installation guide until FileMaker is installed
6. Open the FileMaker Pro application

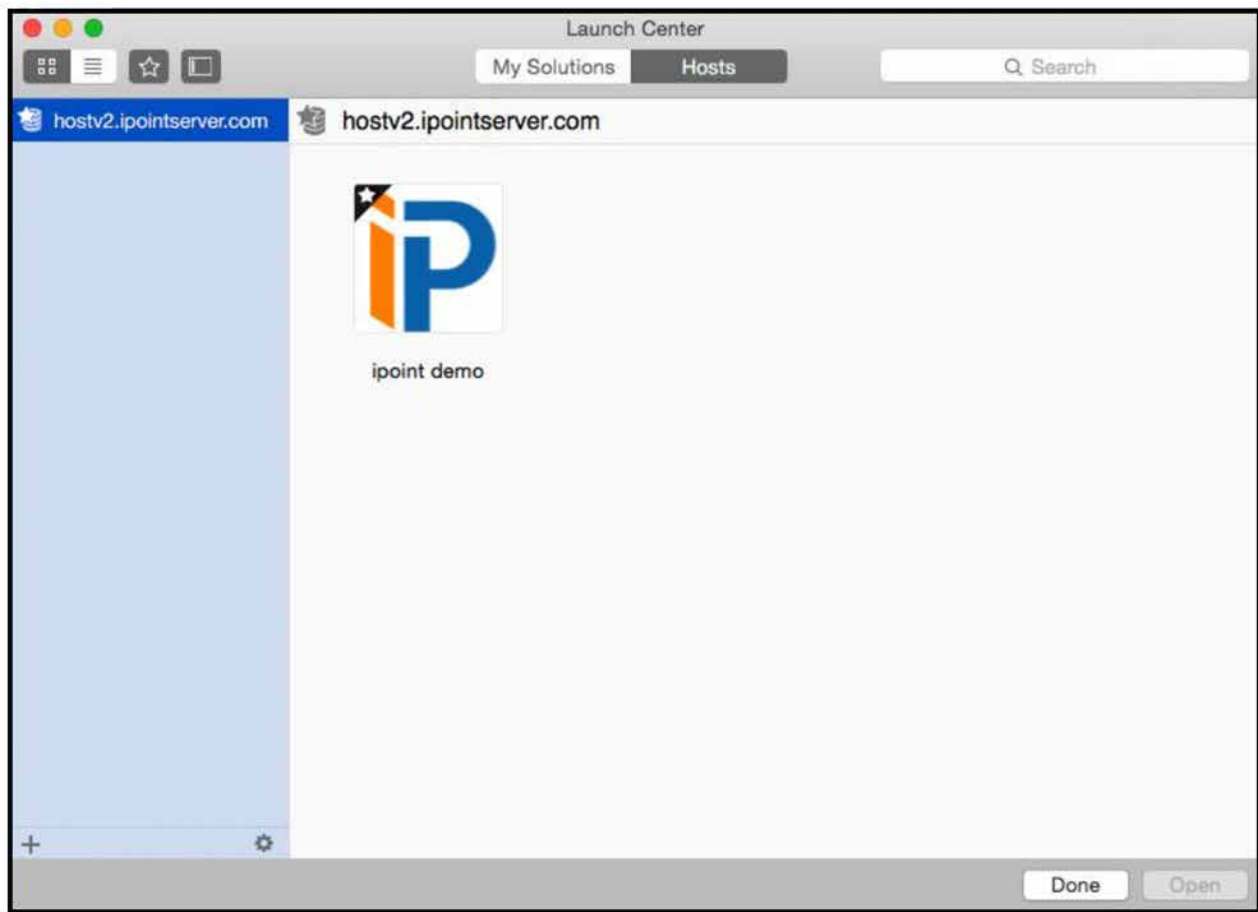
7. Close out of the welcome splash screen that opens
8. Open the Launch Center (File > Open Remote)
9. Go to the Hosts tab and click the plus sign in the lower-left corner
10. Enter in your iPoint server name in the Host's Internet Address field and click Save



11. Enter your iPoint user name and password and click the checkbox to save it in the Keychain



12. You will see your file name with the iPoint Logo



13. Click the star in the left corner of the file icon to mark it as a favorite
14. Double click the file to open iPoint
15. Re-enter your user name and password
 - a. Mark the box to save the password so you don't have to enter it every time
16. You will need to have your iPoint administrator enter in their user name and password to authorize the computer
17. You will be prompted to enter in a name for this device (for example, Rob's PC)

You have successfully installed iPoint!!!

To open the iPoint dashboard in the future, simply open FileMaker and double click your favorited iPoint icon. If you run into any issues, don't hesitate to contact iPoint Support at (800) 535-4101 or email us at support@ipointsolutions.net.

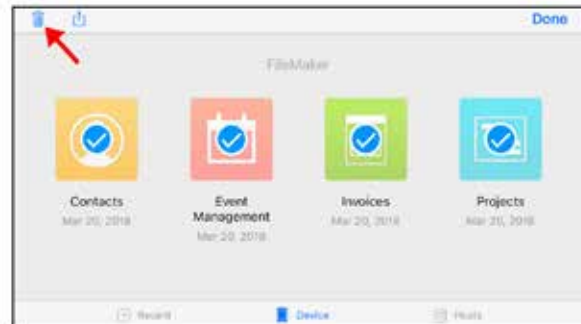
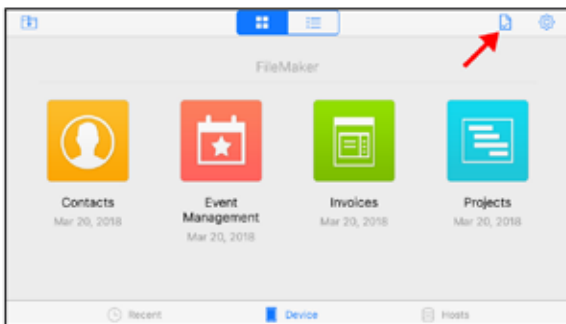
iOS Devices

This guide will walk you through the process of installing iPoint on your iOS device. Before you begin, make sure that you have the following:

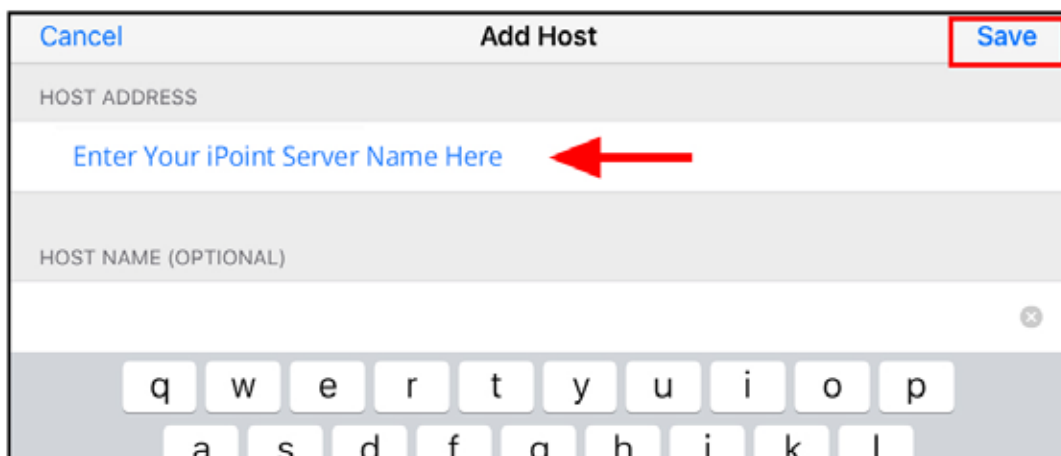
- Your iPoint user name and password
- iPoint server name and iPoint file name
- Contact iPoint Support for these at support@ipointsolutions.net or (800) 535-4101 ext. 1

Once you have this information you are ready to begin!

1. Download the FileMaker Go 16 app to your device from the App Store
2. Open FileMaker Go 16
3. Click the file folder on the top left of the screen and click Launch Center
4. Click on Device on the bottom of the screen
5. Delete the files listed:
 - a. On iPhone: Click the Select icon at top right, select each file, and then click the trash can icon at top left to delete



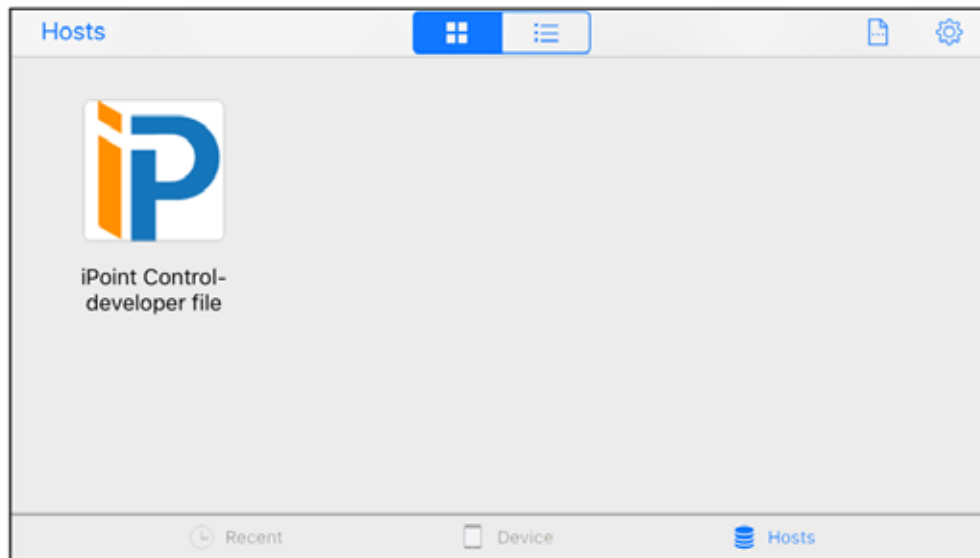
- b. On iPad: Swipe left across each file and click Delete
6. Click the Hosts icon at the bottom of the screen
 7. Click Hosts in the top-left corner
 8. Click the plus sign in the top-right corner to add your host
 9. Enter in the server name in the Host Address field
 - a. Your server name is provided by iPoint Support



10. Click Save at top right
11. Enter in your iPoint user name and password
 - a. Select Save in Keychain on iPad (iPhone will automatically save it to your Keychain)



12. Click Sign In in the top-right corner
 - a. DO NOT click Login as Guest
13. Find your file name in the list of files available on your host and select it
 - a. Your file name is provided by iPoint Support



14. You will be prompted to enter in a name for this device (for example, Rob's iPad)

You have successfully installed iPoint!!!

To open iPoint in the future, simply open the FileMaker Go app and click on your file name from the Recent files list. If you run into any issues, don't hesitate to contact iPoint Support at (800) 535-4101 or email us at support@ipointsolutions.net.