

Software Requirements

Overall View of LVS

Our process:

1. Potential customer calls in / we receive a referral and we qualify them using our call script. If qualified, we will print out a plan (if provided) or a satellite image of their property and schedule our walk-thru / demo.
2. We walk the property with the customer to understand their goals and needs for a video surveillance system. While there, we draw on the plan or image all the locations of the proposed cameras, as well as noting other equipment and additional items needed on our Estimator form. Back at the office we input the hand drawing into Photoshop and create the quote using the field notes, and then schedule a take-back.
3. If the client accepts the quote we will invoice them, and then order their equipment. Upon arrival of the equipment, we will schedule the installation.
4. During installation, the technicians record what was installed, along with each items serial #. If they complete the installation, they have the client sign off on their work, and then they show the customer how to use the product.
5. At the office, we will finalize the invoicing and record all of the serial #s installed for that client.
6. Service calls work much the same from steps 3-5, if the client has a service contract.

1 Leads/Deals/Opportunities

Currently we are using Pipedrive for this, and we like the functionality and ease of use (see screen shot below). Its limitations are: reports and continuing the lifecycle of the client past the sales stage.

The screenshot displays the Pipedrive CRM interface with a pipeline of deals. The pipeline stages are: Contact, Qualified, Design, Proposal, Follow up, and Won. Each stage shows a list of deals with their respective values and statuses. The 'Contact' stage has 34 deals, 'Qualified' has 12, 'Design' has 10, 'Proposal' has 7, 'Follow up' has 28, and 'Won' has 2 deals. The deals are listed in a table format with columns for the deal name, value, and status. The 'Contact' stage includes deals like 'Karsten Interior Services', 'Jody Mesa', 'Carla Delarosa - CCTV', 'Smith Residence', 'Town West CIA', 'Sue Jackson', 'Strategic Filtration', 'South Coast Terminals', 'Sandpoint HOA', 'Rockwool Manufacturing', 'Raymond James Investments', 'PSP Diesel', 'ProMaxima', and 'Park Ave Complex'. The 'Qualified' stage includes deals like 'Kameron Horitz', 'Eagle Springs', 'Kim Forrest Resi-CCTV', 'Valerus', 'McRee Ford', 'Fast Track', 'Clean Air Engineering', 'Republic Heat Treat - upgrade', 'Clean Air Engineering deal', 'Sarna Residence', and 'Rob Barnes - Resi CCTV'. The 'Design' stage includes deals like 'Johnson Supply - Garland TX', 'Taha', 'ProSorbents', 'Pollo Performance Shop', 'Faranesca Vargar', 'Greens Point Mail', 'Carol's Lighting', 'Chance', 'Bay Area First Baptist', 'Ann Blosser', 'Capital Surveying Supplies deal', 'Casa Ole #52', and 'Martin Preferred Foods deal'. The 'Proposal' stage includes deals like 'Boasso America', 'Hope Church', 'ABC Contractors', 'Bernier Motor Cars', 'Eagle Energy', 'Avid Controls New Site', 'Swales Residence', and 'General Electric'. The 'Follow up' stage includes deals like 'Hunter Buildings LLC', 'Catalina Apartments', 'MAK & CO (Mosque)', 'Malone Industrial Machine', 'Lord Of Life Christian School', 'Little Yacht Sales', 'Interstate Powercare', 'Hoerbiger Service Inc.', 'Generon', 'Fredrick Trucking', 'Coast Guard', 'Pine Trace Upgrade and Addon', 'Petronash', and 'Oscar Freeman'. The 'Won' stage includes deals like 'Capital Insulation' and 'EPA Houston'.

Contact	Qualified	Design	Proposal	Follow up	Won
Karsten Interior Services deal 0.5 Karsten Interior Services	Kameron Horitz 0.5 Kameron Horitz	Johnson Supply - Garland TX 15,000 \$ Johnson Supply	Boasso America 8,900 \$ Harry Billie	Hunter Buildings LLC 87,900 \$ Johnerrick Cinton	Capital Insulation 6,970 \$ Robert Baker
Jody Mesa deal 0.5 Jody Mesa	Eagle Springs 0.5 Roy Duett	Taha 0.5 Taha	Hope Church 0.5 John Favor	Catalina Apartments 70,000 \$ Maxime Douge	EPA Houston 26,830 \$ Anthony Pandolfino
Carla Delarosa - CCTV 0.5 Carla Delarosa	Kim Forrest Resi-CCTV 0.5 Forrest Orthodontics	ProSorbents 0.5 Scott Mitchell	ABC Contractors 8,550 \$ ABC Houston	MAK & CO (Mosque) 0.5 Yousef Kazmi	
Smith Residence 0.5 Fredrick Smith	Valerus 0.5 Thomas Marine	Pollo Performance Shop 0.5 Faranesca Vargar	Bernier Motor Cars 4,000 \$ Ibrahim Martinez	Malone Industrial Machine 55,000 \$ Bobby Malone	
Town West CIA 0.5 Richard Campbell	McRee Ford 0.5 Mark Webster & Carter	Greens Point Mail 0.5	Eagle Energy 18,400 \$ Eagle Energy	Lord Of Life Christian School 8,000 \$ Andy VanWeele	
Sue Jackson 0.5 Sue Jackson	Fast Track 0.5 Fast Track Specialties	Carol's Lighting 0.5 Chance	Avid Controls New Site 30,700 \$ Avid Controls	Little Yacht Sales 2,000 \$ Kent Little	
Strategic Filtration 0.5 Michelle	Clean Air Engineering 0.5 Clean Air Engineering	Bay Area First Baptist 0.5 Ann Blosser	Swales Residence 0.5 General Electric	Interstate Powercare 15,000 \$ Jared Prisco	
South Coast Terminals 0.5 Chris Laurier	Republic Heat Treat - upgrade 0.5 Republic Heat Treat	Capital Surveying Supplies deal 0.5 Capital Surveying Supplies		Hoerbiger Service Inc. 20,000 \$ Anthony Newsom	
Sandpoint HOA 0.5 Randy	Clean Air Engineering deal 12,300 \$ Clean Air Engineering	Casa Ole #52 0.5 Corley Turner		Generon 52,000 \$ Lenard Piercy	
Rockwool Manufacturing 0.5 Brandon	Sarna Residence 4,000 \$ Achal Sarna	Martin Preferred Foods deal 30,000 \$ Martin Preferred Foods		Fredrick Trucking 12,000 \$ James Frederick	
Raymond James Investments 0.5 Mark Cunningham	Rob Barnes - Resi CCTV 0.5 Rob Barnes			Coast Guard 9,500 \$ Ryan Morgan	
PSP Diesel 3,000 \$ Stephen	Robert Baker residence 0.5 Capital Insulation			Pine Trace Upgrade and Addon 36,000 \$ Pine Trace	
ProMaxima 0.5 Jeff Lovejoy				Petronash 69,200 \$ Tim	
Park Ave Complex 0.5 Shelly				Oscar Freeman 4,231 \$ Oscar Freeman	

What we like about Pipedrive:

1. ability to drag and drop customer into different stage without having to go into their file
2. scheduling next tasks/meetings (shown by red - overdue, green - today, grey - future, or yellow – nothing scheduled denotations)
3. easily see what stage every sales deal our customer is in, in our 'funnel'
4. there is a running list of notes on each customer's page with the last thing that happened, or you can just add a note (it would be great to have the ability to label or organize the notes into importance)
5. Easy input of potential customers & their requirements, how they heard about us, customized fields for reporting, automatic creation of 'contact' and 'organization' all from 1 screen (see below).

6. Once you input a client's info with address, you can click on the address and it pulls up a map to the location enabling you to get the most out of a day of scheduled visits (see below)

What is missing from Pipedrive:


1. Reports are basically nonexistent, but we are able to export the info to create our own
2. Taking the client from sales through to billing, ordering, installation and service, maintenance
3. No 'total customer view' (everything about the customer in 1 place from sales to final invoice and maintenance work to any and all correspondence & paperwork)
4. Calendar view of meetings & sales calls per Salesman – currently we have this auto populating into google calendar with no delineation between employees
5. After you hit 'WON' the deal disappears – this would be awesome if the deal automatically popped up into an 'accounts' section where the complete history of the client would be stored, and if it prompted you with scheduling the task of invoicing the client.

What we must have:

- A full view schedule of all employees' locations, meetings, installations, service.
- Individual calendars for each employee to see their duties/tasks for the day.
- Reports on lead generation, sales, etc.
- One page where all the customer's info is in one place. This can be a front page where we have a running list of notes (even automatic notes showing what the last thing that happened with that customer was) with tabs at the top or side to show us their inventory, installs, services, additional contacts, stores, etc.
- Automatic and re-occurring tasks

2.1 Quoting

We are not currently using a quoting software, however we have created this form which is the basis for how we quote:

			
		Date:	
Estimator		Salesman:	
		Estimate Number:	
Cameras			
Analog or Digital	Nickname	Notes / Mount Needed?	Number Needed
Total Number of Cameras:			
Hardware / Software Needed			
Video Recording Device		Switches	
Type	Number Needed	# of Ports	Number Needed
Encoder (analog only)		UPS Device	
# Ports	Number Needed	VAC Needed	Number Needed
Power Supply (analog only)		Software	
# Channels	Number Needed	Camera Channels Needed	Number of Viewing Clients
Additional Equipment Needed			
Hours/Quantity	Item	Maintenance Level Agreement	
	System Design	Job Notes:	
	Project Management		
	Customer Training		
	Heavy Equipment Shipping		
	Articulating Lift		
	Steel Pole		
	Sub-Contractor Labor		
	Additional Labor Hours		

The quoting portion of the software needs to:

1. Be visually easy to use.
2. Be available via tablet or smart phone in the field for input during a customer walk-through.
3. Have an attached database of cameras and equipment/labor hours to choose from that we can update in the office when prices change.
4. Upon completion of the above there should be a button to select to create a clean looking estimate for the client to sign, or for us to email to them for review that brings the information from the estimate over, with a total price (see below example). I will provide our estimator calculations sheet complete with margins, but we will need the ability to update it.

J&A Liem LLC

06-30-14

Quote# 063014A

Clear Lake Shores, TX

Arinta or Jason

713-703-5676

jasonadamholguin@hotmail.com

Avigilon High Definition Solution – (1) 2MP and (1) LPR Camera

- 1 Extreme High Definition Advanced Digital Recorder with Remote Access, Advanced Programming, Event Recording, Audio & Video Recording, 3TB Storage, Etc., **Future-Proof, Expandable, Upgradable**
- 2 Channel License for Avigilon HD-NVMS Software (Standard Version - up to 5 concurrent users)
- 1 8 Port PoE Switch - Managed
- 1 Avigilon 4 Channel Encoder
- 1 LPR Camera with varifocal lens (License Plate Recognition Camera)
- 1 High Definition (2 MP) Color Day/Night Vandal Dome Camera with Motorized auto focus lens
- 1 Avigilon Wall Mounts
- 1 350VA Surge Protector UPS
- 1 Camera Power Supply
- .5 Spool Direct Burial Cat-5 Cable

Misc. parts & Connectors

Labor and Installation

Hand trenching over to sign

Run conduit from office to sign

	Installation Total*		Monthly Service Charge**
Outright Sale Option (good for 30 days)	\$7,626.00	&	\$73.00
Discounted Price (good for 7 days)	\$6,468.00	&	\$59.00

**Purchase prices listed exclude sales tax. Customer to provide power and high speed internet service.*

***Monthly price is based on desired maintenance coverage (no trip charge, no parts charge, no labor charge for service)*

If you have any further questions, please call me @ 281-744-5202.

Danny Myers

281-744-5202



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Nassau Bay, TX 77058

www.lighthousevs.com

2.2 Mapping *(this section is not mandatory but would streamline the sales process – price separately)*

We hope to incorporate using a digital map during the estimate/walk-through phase that corresponds to the list of cameras on the estimator. We also hope to use this for future maintenance that may need to be done on a camera by using the map to locate which camera needs to be fixed. Currently we hand draw these maps but they are not in use for service calls – only for location of install (see below example).



LIGHTHOUSE LEGEND

- HUB / HE
- ◁ Existing Camera
- ◁ 2 MP Camera
- ◁ Analog Camera

CASA OLE #52
7750 Spencer Hwy
Pasadena, TX 77075



The map needs to be functional on a tablet and computer and do the following:

- We will be estimating wire runs, so we will need to identify some sort of reference measurement
- I need to be able to choose a camera type and show it's 'field of view'
- The above plan only shows the general types of cameras (either digital or analog), but I would want the ability to add other symbols and different types of lines to show wire runs.
- I will need to be able to upload my own background plan from a scan or pdf, or use a google map.
- I will need to number and add a note to each camera like: 'under the cabinet', or 'at 50ft above the floor, attached to pole'. The number of the camera will correspond to our estimator list.
- I would like to be able to 'lock' the locations of the cameras so they can't accidentally be moved during viewing or editing of a plan.
- I would like another field to indicate that camera's serial # that the installers can add during installation. This plan will be used later to find the camera/serial # that is having an issue during a service call. It will become part of the customer's record.

3.1 Contracts / Maintenance Agreements

This is pretty standard for Customer Service/relationship software. We will need the following:

- If we are at a small job, and we have written out our estimator form and the client agrees to a price, we will need the ability for the client to sign the quote right there in the field on our salesman's tablet. The customer will be viewing the page with item list and total price only, not the break down in pricing.
- The quote will become the contract, and after they sign (whether in the field or at a later date) we will want to be able to email that contract to them from the tablet, along with our terms and conditions which the salesman will want to review with the client (we will need some sort of viewing page for that, that won't stop the quoting process).
- We have a few options for maintenance/service agreements. We will need to be able to pull up a customer's record and easily see what plan they have, what all is included and when it expires.
- The same is true for individual pieces of equipment the customer may have. Each is under a warranty that will eventually expire and we will need some sort of a warning system to alert us to the fact that it will expire so we can upsell them.

3.2 Purchase Orders / Check-In Parts / RMA'S

Upon acceptance of an estimate, we will order the equipment. We would like the following:

- Ability to transfer items from the quote to an order form that we will send to our vendors. (We have several vendors, and we also have some things on hand, so maybe a simple checkbox function that allows us to choose which items need to be ordered to which vendor and which need to be checked to make sure we have in stock.)
- The vendors require the following information:
 - Quantity
 - Part #
 - Description
- Our Purchase orders are numbered using the Clients name-the date-and the vendor ID. We do this for ease of searching. (example: Capital Insulation, 11-14-14, Avigilon = CAPT-111414-AVI)
- We need a reminder after ordering to input the tracking # sent by the vendor, as well as the expected arrival date so we can have another pop-up that reminds us to be on the lookout for that order in case the vendor didn't process it.
- It would be nice to have an "Inventory" section where we would have a list of all the pending orders, orders sent, and orders arrived, ready to be dispatched.

Upon arrival of equipment we will:

- Obtain the packing list and check order against the PO, recording all the serial #s associated with each part that will be installed.
- Schedule to Installation or Service Repair.

Sometimes the ordered parts are found to be defective so we will need to send them back to the vendor as an RMA (Return Merchandise Authorization).

- Again we will want to be able to see when these orders were received, sent, and arrived (in the case of a replacement) Maybe an option on our records to check if we are expecting a replacement or not.
- RMA's require the tracking of serial #s. If we remove a part from a job and replace it with a new one, we will need to record the serial # taken out (which will go thru the RMA process) and the new serial # going in so it will be under the clients warranty agreement.

During an install the technician will use an 'installation form' (see below).

- We want this to be a digital input form so we can track the serial #s that are installed at the job.
- We will need an added field for 'location' which will correspond to our field map from section 2.2

- There will need to be a digital signature from the client upon completion of the install.
- There needs to be a 'start' and 'stop' timer field
- There needs to be a mileage field or even better, an automatic tracking of the technicians drive recording the mileage if they select 'go to job' (or something similar to start the trek)
- We need the ability to 'pause' the job in the event that the technicians take a lunch, or have to come back the next day to finish installation.
- Techs may need access to installation guides or procedures while in the field from their devices (we want the ability to have a library available to them)

5 Service Calls / Service Tickets

These will be much the same as installs (see Service form below). We will need a general 'scheduling system' for both installs and service work.

18018 Nassau Bay Dr.
Nassau Bay, Texas 77058
(281) 744-5202 office

www.LighthouseVS.com



SERVICE CALL REPORT

Customer:	Job Number:	Arrival Time
Contact:	Date:	:
Address:	Project Leader:	Departure
City, State, Zip:	Estimated Time:	:
Phone:	Job Type:	
Work Requested by:	Internal use only	total travel time:

Percentage of Completion:	Customer Signature if Billable
	Percentage Reached:

Materials

Equipment/Materials Installed	Qu.	PART #	SERIAL #

Labor

Technician	Regular Hrs	OT Hrs	Certified Tech Hrs	Issues (off, late, no-show)

Summary of Work Completed:

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Items Removed or Replaced

OLD Item	Model #	Serial #	NEW Item	Model #	Serial #
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The technicians will need to:

- Access current customer's info, previous jobs, service history, equipment location maps and serial #s.
- Select a product and add notes to it for future reference or the sending of an RMA.
- Perform an 'advanced replacement' of a part or camera that we know has to be replaced.
- Be able to 'pause' the job in the event they need to wait for an ordered part to come in.

6 Specs

Occasionally we have jobs that require additional safety measures. We will need:

- an alert or message to pop up to the installation techs telling them to be prepared for that
- the ability to add those additional time frames to the scheduler
- a way to view the specifications via phone or tablet

7 Invoicing

We currently use Quickbooks online and will need that to integrate with our new system. We would prefer this to be an automatic daily sync with a notification of successful transfer.

8 Customer '360 View'

This is one of the most crucial pieces to our system. Currently we do not have everything in one place. We will need:

- Customer name, address, contact(s), other locations
- Running notes section on who did what last
- Tabs at top or sides for completed installations, service, the map of equipment/asset locations, assets (with history per asset & serial #s)

Overall, this is a list of what we need:

- | | |
|---------------------------------|--------------------------------|
| • QuickBooks integration | • purchase orders |
| • projects/installation records | • inventory/assets |
| • scheduling for techs | • invoicing |
| • service tickets | • customer portal for service |
| • quoting | • digital signature |
| • price lists | • customer portal for invoices |
| • scheduling for sales | • GPS tracking for mileage |
| • Sales Funnel | • RMAs |
| • reports on sales | |
| • time sheets | |
| • ease of use | |
| • tasks and reminders | |
| • notes on clients & jobs | |
| • internal discussion | |
| • email integration | |
| • email campaigns | |
| • reports on service | |
| • Maintenance Agreements | |
| • time on job | |