# Software Requirements

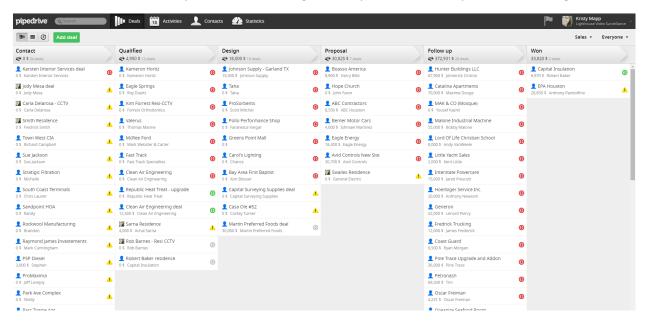
#### Overall View of LVS

#### 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

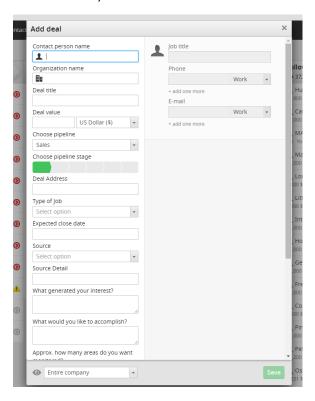
Currently we are using Pipedrive for this, and we like the functionality and ease of use (see screen shot below). Its limitations are: reports and continuing the lifecycle of the client past the sales stage.



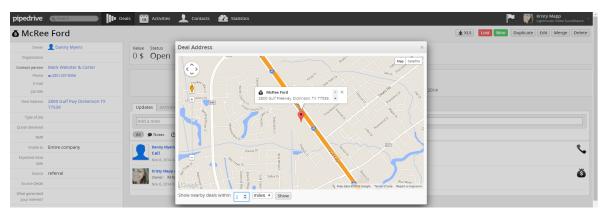
#### What we like about Pipedrive:

- 1. ability to drag and drop customer into different stage without having to go into their file
- 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:

Light	TOUSE SURVEILLANCE, LLC								
		Data							
		Date:							
<b>Estim</b>	ator	Salesman:							
LStilli	atoi	Estimate Number:							
	Cameras								
Analog or Digital	Nickname	Notes / Mount Needed?	Number Needed						
		Total Number of Cameras:							
		rotal Hallings of Gallionas.							
	Handa	/ Coffeens Noodod							
		vare / Software Needed							
	ideo Recording Device	Switches							
V Type			Number Needed						
	ideo Recording Device	Switches	Number Needed						
Туре	ideo Recording Device  Number Needed	Switches # of Ports	Number Needed						
Туре	ideo Recording Device  Number Needed  Encoder (analog only)	Switches # of Ports  UPS Device	Number Needed						
Туре	ideo Recording Device  Number Needed	Switches # of Ports	Number Needed  Number Needed						
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Type # Ports	Number Needed  Fincoder (analog only)  Number Needed  Number Needed	Switches # of Ports  UPS Device  VAC Needed  Software	Number Needed						
# Ports  # Channels	ideo Recording Device  Number Needed  Encoder (analog only)  Number Needed  wer Supply (analog only)  Number Needed	Switches # of Ports  UPS Device  VAC Needed  Software	Number Needed						
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# Ports  Port # Channels	ideo Recording Device  Number Needed  Encoder (analog only)  Number Needed  wer Supply (analog only)  Number Needed  item  System Design  Project Management  Customer Training  Heawy Equipment Shipping  Articulating Lift	Switches # of Ports  UPS Device VAC Needed  Software Camera Channels Needed  Maintenance Level Agreement	Number Needed						
# Ports  Port # Channels	ideo Recording Device  Number Needed  Encoder (analog only)  Number Needed  wer Supply (analog only)  Number Needed  item  System Design  Project Management  Customer Training  Heawy Equipment Shipping  Articulating Lift  Steel Pole	Switches # of Ports  UPS Device VAC Needed  Software Camera Channels Needed  Maintenance Level Agreement	Number Needed						
# Ports  Port # Channels	ideo Recording Device  Number Needed  Encoder (analog only)  Number Needed  wer Supply (analog only)  Number Needed  item  System Design  Project Management  Customer Training  Heawy Equipment Shipping  Articulating Lift	Switches # of Ports  UPS Device VAC Needed  Software Camera Channels Needed  Maintenance Level Agreement	Number Needed						
# Ports  Port # Channels	ideo Recording Device  Number Needed  Encoder (analog only)  Number Needed  wer Supply (analog only)  Number Needed  item  System Design  Project Management  Customer Training  Heawy Equipment Shipping  Articulating Lift  Steel Pole  Sub-Contractor Labor	Switches # of Ports  UPS Device VAC Needed  Software Camera Channels Needed  Maintenance Level Agreement	Number Needed						

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

- 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

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

Danny Myers 281-744-5202



<sup>\*</sup>Purchase prices listed exclude sales tax. Customer to provide power and high speed internet service.

<sup>\*\*</sup>Monthly price is based on desired maintenance coverage (no trip charge, no parts charge, no labor charge for service)

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).









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.

## 4 Projects / Installations

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

Lighthouse Vide	eo Surveilla	ancce, L	LC.				
18018 Nassau Bay D					The state of the s		
Nassau Bay, Texas 7							
(281) 744-5202 office						abl	1100
					- 1 /4 (	ghtho	use_
www.LighthouseVS.c	<u>;om</u>		1110741	555			
			INSTALI	- REP	ORI		
Customer:				Job	Number:		Arival Time
Contact:				Date:			:
Address:				Project Leader:			Departure
City, State, Zip:				Job Type:			:
Phone:				Internal	use only	total travel time:	
Percentage of Completion:		Custome	r Signature if Install	complete:			
			Ma	terials			
	Equipment	/Materials	Installed		Qu.	PART #	SERIAL #
			La	abor			
Technician	Regular Hrs	OT Hrs	Certified Tech Hrs		ls	ssues (off, late, no-shov	v)
Summary of Work (	Completed:	l					

- 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:			Arival 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 Percentage	e if Billable e Reached:				
				terials				
	Equipment	/Materials	sinstalled	Qu.		PART #	SERIAL #	+
Technician	Regular Hrs	OT Hrs	L. Certified Tech Hrs	abor	Is	ssues (off, late, no-sho	w)	
								+
Summary of Work	Completed:		1	ı				
			Items Remo	ved or Replace	1			
Ol D Itom	Model #		Sorial #	NEW Itom		Model #	Sorial #	+

#### 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
- projects/installation records
- scheduling for techs
- service tickets
- quoting
- price lists
- scheduling for sales
- Sales Funnel
- 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

- purchase orders
- inventory/assets
- invoicing
- customer portal for service
- digital signature
- customer portal for invoices
- GPS tracking for mileage
- RMAs