# IPOINT DETAIL WORKFLOW



Workflow diagram with the following elements:

**Proposals branch:**
- NEW PROPOSAL
  - EXHISTING CUSTOMER → ADD EXISTING CUSTOMER
  - NEW CUSTOMER → NEW CUSTOMER → ADD EXISTING CUSTOMER
- ADD EXISTING CUSTOMER → ADD ROOMS → ADD PRODUCTS → SEND PROPOSAL
- SEND PROPOSAL
  - PROPOSAL IS ACCEPTED → CONVERT TO SALES ORDER
  - CUSTOMER HAS EDITS → CREATE REVISION → SEND PROPOSAL
  - PROPOSAL IS DECLINED → ARCHIVE PROPOSAL

**Sales Orders branch:**
- CONVERT TO SALES ORDER
  - CUSTOMER WANTS TO ADJUST SALES ORDER → CREATE CHANGE ORDER → CONVERT TO SALES ORDER
  - → ALLOCATE ON HAND STOCK
  - → CREATE PROJECT TASKS
  - → INVOICE SALES ORDER

**Allocate / Order Products:**
- ALLOCATE ON HAND STOCK
  - NOT ENOUGH STOCK ON HAND → ORDER PRODUCTS
- ORDER PRODUCTS
  - YOUR COMPANY HAS A PURCHASING MANAGER → SUBMIT PRODUCT REQUEST → CREATE PO FROM PURCHASING MANAGER → RECEIVE & ALLOCATE PRODUCTS
  - YOU ORDER PRODUCTS FOR YOUR COMPANY → CREATE PO FROM SO PRODUCT MANAGER → RECEIVE & ALLOCATE PRODUCTS
- RECEIVE & ALLOCATE PRODUCTS → DELIVER PRODUCTS
- DELIVER PRODUCTS
  - ALL PRODUCTS ALLOCATED → ALLOCATE ON HAND STOCK
  - USE DEFERRED REVENUE → GENERATE INTERNAL DELIVERY INVOICES
  - DEFECTIVE PRODUCT → CREATE RMA TICKET

**Projects branch:**
- SERVICE CALL → CREATE SERVICE PROJECT → CREATE PROJECT TASKS
- CREATE PROJECT TASKS → SCHEDULE WORK ORDERS → COMPLETE WORK ORDERS
- COMPLETE WORK ORDERS → INVOICE FOR SERVICE
- ADD ADDITIONAL PARTS (dashed) → CREATE CHANGE ORDER

**Invoice branch:**
- INVOICE SALES ORDER
  - DEFERRED REVENUE → CREATE REQUEST FOR PAYMENT PER PAYMENT SCHEDULE → GENERATE INTERNAL DELIVERY INVOICES
  - LINE ITEM OR SUMMARY → ADD SELECTED PARTS & LABOR TO INVOICES → CREATE FINAL INVOICE FOR BALANCE DUE

## iPoint Modules Color Key

- PROPOSALS (light blue)
- CRM (purple/magenta)
- SALES ORDERS (orange)
- PROJECTS (blue)
- INVENTORY (gray)
- PURCHASE ORDERS (yellow)
- WORK ORDERS (red)
- RMAS (green)

iPoint