

# Implementation Review



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## ***Table of Contents***

Tigerpaw CRM+ Version 10 .....	1
Implementation Review .....	1
Table of Contents .....	2
Overview .....	3
Instructions.....	4
System-Wide Features and Functions.....	5
Implementing a new system.....	5
Pursuit Contact Management and Marketing .....	7
Quotes and Proposals (Includes Work Orders and Invoicing).....	10
Service & Repair service, technician and contract tracking .....	12
Parts Inventory Control.....	14
Reports .....	16
Accounting Interface.....	17

*Overview*

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**Customer Implementation Review (CIR)  
for**

**Company** \_\_\_\_\_  
**Contact** \_\_\_\_\_  
**Phone** \_\_\_\_\_  
**Email** \_\_\_\_\_

**Date** \_\_\_\_\_

## ***Instructions***

Print a copy of this document and fill in each bracket. If you are not using a feature of Tigerpaw CRM+, enter a 1,2, or 3 for High, Medium or Low as your level of priority for implementation. If you are using a feature, enter a "U" if you fully understand the feature or enter an "H" if you need additional help. Use this document often to maintain an accurate assessment of your implementation of Tigerpaw CRM+.

If you need an explanation for a specific function, please reference the Tigerpaw User Guide available through the Tigerpaw Software Start menu or on-line under Help in the application. Also, view how to use specific functions and features using the [on-line Video reference library](#).

This review is divided into several sections:

System-Wide – general, non-module specific features and functions

Pursuit – contact management and marketing

Quotes – detailed proposals and work orders

Service & Repair – customer service, technician and contract tracking

Parts – purchasing and inventory control

Reports – use of the Reports Explorer and Crystal Reports

Accounting interface – steps required to interface to several accounting packages

Enter one of the following for each item:

**1** - High Priority – not using now, want to implement

**2** - Medium Priority – want to implement after High Priority items

**3** - Low Priority – do not need or may not ever implement

**U** - Using and fully understand – do not need any more help

**H** - Using somewhat, but need help to fully utilize

## ***System-Wide Features and Functions***

- [ ] Tigerpaw Business Suite Overview
- [ ] Pursuit Overview
- [ ] Quotes Overview
- [ ] Service & Repair Overview
- [ ] Parts Overview
- [ ] Using on-line Help (On-line User Guide, How Do I... feature).
- [ ] Understanding what is available at the Tigerpaw Web site.
- [ ] Watching on-line training videos.
- [ ] Attending regularly scheduled Webex classes.
- [ ] Using FAQs (frequently asked questions) on Tigerpaw Web site.
- [ ] Participating in Tigerpaw on-line Forums.
- [ ] Understanding how information flows through CRM+.
- [ ] Attaching to the Sample Database.
- [ ] Using a sample database and scripts to enter/process information.
- [ ] Navigating Tigerpaw CRM+ (using Views, rearranging columns, customizing tool bars and grids).
- [ ] Using a list view and placing results in a group.
- [ ] Searching for data.

## ***Implementing a new system***

- [ ] Developing an implementation plan.
- [ ] Installing Enterprise MSDE .

- Setting up a new database.
- Setting up system options.
- Setting up master tables.
- Setting up a new user parameters, password, preferences.
- Setting up Rep (employee) groups.
- Setting up security.
- Understanding the steps required to set up accounting.
- Importing data.

## ***Pursuit Contact Management and Marketing***

- [ ] Using Accounts to maintain prospect and customer information.
- [ ] Using the Type code to differentiate types of accounts.
- [ ] Using the Status code to identify the status of an account.
- [ ] Understanding the Marketing tab interface.
- [ ] Using Groups.
- [ ] Using Profiles to codify an account.
- [ ] Using SIC Codes to classify businesses by categories.
- [ ] Using the Web Tab interface.
- [ ] Using the Web URL link.
- [ ] Using Email addresses.
- [ ] Using the Instructions Tab interface.
- [ ] Maintaining Service Instructions.
- [ ] Maintaining Quotes Instructions.
- [ ] Maintaining Directions to location.
- [ ] Using Backtrack.
- [ ] Maintaining the account Journal.
- [ ] Using the Data Miner.
- [ ] Scheduling Tasks (alarmed).
- [ ] Scanning in documents and linking them to accounts.
- [ ] Linking stored Documents/files to accounts/contacts.
- [ ] Using Workflow.

- [ ] Using Activities.
- [ ] Maintaining Circuits rmaton.
- [ ] Preparing Quotes.
- [ ] Maintaining Contracts.
- [ ] Creating Service Orders.
- [ ] Maintaining Customer Inventory purchase history.
- [ ] Using Custom Account Fields.
- [ ] Using Custom Folders.
- [ ] Maintaining A/R (Bill/Ship to, Tax).
- [ ] Maintaining Systems.
- [ ] Using the Reference Library / Knowledge Base.
- [ ] Using the Group Explorer (Group email, fax, word merge).
- [ ] Auto-Dialing a phone number
- [ ] Emailing a contact
- [ ] Merging to Word (Single letter)
- [ ] Using the Calendar for scheduled appointments X
- [ ] Using the Account List View
- [ ] Using the Contact List View
- [ ] Using the Task List view (follow-up, past dues, what's next)
- [ ] Using the Journal List view
- [ ] Using the Workflow List View

- [ ] Using the Activity List View
- [ ] Using the Outlook Inbox, linking incoming emails to contacts
- [ ] Maintaining Contacts
- [ ] Using Custom Fields
- [ ] Using Contact Profiles
- [ ] Using Contact Groups
- [ ] Duplicating contacts

## ***Quotes and Proposals (Includes Work Orders and Invoicing)***

- [ ] Preparing quotes.
- [ ] Using Assemblies / Kits on a quote.
- [ ] Using Labor hours on a quote.
- [ ] Using Quote templates.
- [ ] Using Discounts on a quote.
- [ ] Using Billing .
- [ ] Using Shipping .
- [ ] Using Manager approval function.
- [ ] Using Status changes to manage work flow.
- [ ] Forecasting sales.
- [ ] Creating and managing opportunities
- [ ] Emailing quotes.
- [ ] Using Work Orders.
- [ ] Filling from inventory.
- [ ] Invoicing.
- [ ] Posting invoices to update the database.
- [ ] Using the Invoice List view.
- [ ] Using Credit Memos.
- [ ] Emailing invoices.
- [ ] Creating a service order from a quote.

- [ ] Using follow-up Tasks (Alarmed) for a quote.
- [ ] Using the Quote List view.
- [ ] Using the Work Order list view.
- [ ] Using the Credit Memo list view.

## ***Service & Repair service, technician and contract tracking***

- [ ] Preparing Service Orders.
- [ ] Using customized Status & Type codes to control work flow.
- [ ] Opening & Closing a service order.
- [ ] Assigning a technician to a service order.
- [ ] Using Billing & Shipping information.
- [ ] Using service order Notes.
- [ ] Tracking Items Serviced.
- [ ] Tracking RMA items back to vendor, printing packing slip.
- [ ] Entering Time Logs / Expenses.
- [ ] Using the Batch time log entry function.
- [ ] Recording Parts & Labor Used for invoicing.
- [ ] Exchanging inventory with a customer, posting the Exchange.
- [ ] Filling a service order from inventory.
- [ ] Preparing an Invoice.
- [ ] Utilizing partial invoicing.
- [ ] Posting invoices to update inventory.
- [ ] Emailing an invoice.
- [ ] Using the Invoice List view.
- [ ] Issuing a Credit Memo.
- [ ] Tracking customer inventory history.

- [ ] Using Symptoms & Resolutions Codes.
- [ ] Using the Statistics tab.
- [ ] Scheduling Tasks (alarmed) for techs for a service order.
- [ ] Using the graphical Dispatching function to schedule techs.
- [ ] Using the Service Order List View – printing a batch of orders.
- [ ] Using the Calendar.
- [ ] Using Contracts (creation, maintenance, link to service calls).
- [ ] Performing Contract Billing (recurring invoicing).
- [ ] Using the RMA List view.
- [ ] Using the Contract List view.
- [ ] Using the Exchange List view.
- [ ] Using Workflow.

## ***Parts Inventory Control***

- [ ] Understanding how to define and create price book items and future impact.
- [ ] Understanding and using seven levels of pricing, multiple ways to pre-price an item.
- [ ] Using multiple vendors for an inventory item.
- [ ] Understanding stock items versus non-stock inventory.
- [ ] Importing a price list.
- [ ] Adjusting pricing rmaton.
- [ ] Adjusting inventory counts.
- [ ] Establishing mainenance price and warranty for an inventory item.
- [ ] Defining purchasing rmation (receiving location, case quantities).
- [ ] Understanding inventory detail (on hand, on order, reserved).
- [ ] Understanding assemblies.
- [ ] Understanding serialization of items and bar coding.
- [ ] Searching by serial number, reviewing serial number history.
- [ ] Preparing Purchase orders (ordering, receiving, posting to inventory)
- [ ] Using Hot items for important inventory.
- [ ] Using Smart PO for automatic creation of purchase orders.
- [ ] Flagging items Inactive so they are not used.
- [ ] Using a Picture file for an inventory item.

- [ ] Exchanging a new item for one in customer inventory.
- [ ] Understanding inventory locations and the transfer function.
- [ ] Using the Price Book list view.
- [ ] Using the Purchase Order list view.
- [ ] Using the Transfer list view.
- [ ] Using the Received items list view.
- [ ] Getting the initial counts of inventory into the system using a Purchase Order.
- [ ] Preparing for your first physical inventory.
- [ ] Printing the physical inventory worksheets.
- [ ] Taking a physical inventory count while suspending all filling and receiving.
- [ ] Entering in the physical inventory counts.
- [ ] Making adjustments to physical inventory counts.
- [ ] Posting a new physical inventory count update.

## ***Reports***

- [ ] Familiarization with the Reports Explorer.
- [ ] Understanding the Reports Explorer.
- [ ] Understanding how to locate a report.
- [ ] Understanding the reports categories.
- [ ] Print Previewing a Report and exporting the data in a report.
- [ ] Using the Scoreboard Reports.
- [ ] Modifying report definitions.
- [ ] Creating your own reports using Crystal reports and entering them into Reports Explorer.

## ***Accounting Interface***

- [ ] Understanding basic accounting principles.
  
- [ ] Understanding your company's current General Ledger Chart of Accounts.
  
- [ ] Using your current accounting software on a regular basis for A/R and G/L.
  
- [ ] Understanding and using Distribution Codes.
  
- [ ] Understanding and using tax districts and tax codes.
  
- [ ] Understanding where and how to set up the accounting interface system options.
  
- [ ] Understanding how to set up a price book item for accounting.
  
- [ ] Understanding how to set up a customer for the accounting interface, both in Tigerpaw and in your accounting software.
  
- [ ] Understanding when and how to create batch transaction files for importing customers, A/R transactions and G/L transactions.
  
- [ ] Understanding how to create an accounting interface definition for accounting software not supported by Tigerpaw Software.