iMedia Platform Modules

Our 16 years of creating customized business applications for businesses has created a large inventory of business structures and procedures that enable us to create semi custom business software very rapidly. All of our software modules have been written to be compatible with each other.

The **iMedia Business Platform** encompasses the entire business workflow from Outbound Marketing to Sales Management to Project/Job Management to Invoicing. The entire system is Quickbooks compatible. Any or all the information in the iMedia Platform can be “Live-Linked” to QuickBooks and other accounting packages.

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Groups and Group Members allows a hierarchical group structure to be created with an unlimited number of group members assigned to each group. Email marketing can be personalized by group member and sent by group. Digital assets can be assigned to individual group members. Personalized pdf documents can be created by group member based on a subset of digital assets. Group members can be moved to client or customer in the system.

Client/Customer allows personalized information about the companies and accounts you work with. These are normally the companies and individuals that your company provides products and services for. An unlimited number of contacts can be associated with the Client/Customer.

Contacts are people that your organization works with. Contacts can be associated with multiple Client/Customers and Vendors. Contacts can sync with address books on phones and computers.

Activities is a log of all the sales and non-sales activities that everyone in the company performs usually with people outside of the company. Activities can be assigned to clients, vendors, and contacts. They contain a open/closed status, notepad message, Follow Up Action, Promise Date, Price Quoted, Activity Type and Subtype, and Followup Department. Notifications via email and text message can be generated by Followup Department.

Catalog Items are all the products and services offered by the company. Items can be either internally created or performed through the people within the company or externally created or performed through external vendors. Items can be physical items that are purchased or created or labor items that people perform. Price Lists, Printed Catalogs, and automatically created static web pages with associated digital assets such as pdfs and videos can be attached to each item. These can be product literature, installation manuals, or any type of digital file. A single item can add an entire workscope or grouping of products.

Estimates/Quotes can be created from scratch, by template, or through a quote wizard that can be based on a procedure for a particular make and model number. Estimates/Quotes can be hierarchical where one line item can be drilled into with multiple line items included. Entire workscopes of tasks can be generated by level of service. Estimates/Quotes can be opened and closed with notifications and approval workflows based on email and text messages. Multiple revisions are tracked at each open/close.

Job/Project can be created from an Estimate/Quote or from scratch. Materials. Labor, and Expense are tracked by job/project. Purchase orders can be automatically generated from Job/Project Line Items. Job/Project can be hierarchical with sub-projects, subtasks and/or subassemblies. Status is maintained by line item, People can be assigned to line items. Dates and calendar integration enable scheduling and resource allocation.

Time Slips allow time to be tracked by each assigned task within a Job/Project. Actual time can be monitored in real time by task within a Job/Project. Time slips can be entered either after the task or start/stop buttons can be used to generate time slips.

Tasks are assigned from Job/Project Line Items. Through the mobile interface a worker can see what their assigned tasks are and start and stop the clock on them. When a Task is stopped a Time Slip is generated. Global Positioning Coordinates (GPS) can be logged with the time slip.

Purchasing can force multiple vendor quotes to be obtained before purchasing materials for a job. Purchase orders can be automatically created for a Job/Project. Purchasing status reports monitor the status of materials needed for Job/Projects. Receiving of materials can be completed through either the mobile or desktop interface. A QR code is printed on the Purchase Order that takes the mobile interface directly to the PO being received.

Assets or physical assets are physical items that are owned by a customer, a vendor, or the company. The asset's manufacturer, product number, serial number, and any number of additional attributes can be tracked. Maintenance dates can inform as to when periodic maintenance needs to be performed. Assets can be attached to Contacts, Customers, Estimates/Quotes, Estimate/Quote Line Items, Jobs/Projects, Job/Project Line Items, and /or Locations.

Photos or digital assets are digital files that can be photos, quotes, documents, videos, or any kind of a digital file. Digital assets can be attached to Assets, Contacts, Customers, Estimates/Quotes, Estimate/Quote Line Items, Jobs/Projects, Job/Project Line Items, and/or Locations. Digital assets can automatically be included in Quotes/ Estimates by clicking a checkbox. The mobile interface allows pictures to be taken and attached to a current task.

Locations track physical locations that work is performed, assets are located, photos are taken, contact's offices are located and customer companies are located. Any or all of the above records can be associated with a location.

Scan allows a mobile device to scan a generated QR code and automatically navigate to the associated record in the system. There is one scan function, the system recognizes the different QR codes. Contacts, Customers, Activities, Estimate/Quote, Estimate/Quote Line Item, Job/Project, Job/Project Line Item, Catalog Item, Purchase Order, Physical Asset, Digital Asset, and Location are supported. Scanning a Job/Project Task will open a timeslip on that task. Multiple timeslips can be open at one time. Various methods of allocating time with multiple open tasks are supported.

Expenses can be logged to Jobs/Projects or to Job/Project Line Items. Photos of invoices to be reimbursed can be attached to the expense record. Mileage can also be logged by Job/Project Line Item in this way as well.