



## MarginPoint Professional Services

MarginPoint is a leading provider of cloud-based inventory management solutions. MarginPoint Mobile Inventory can be deployed rapidly without any significant upfront investment and implementation is easier than you may think with MarginPoint's Professional Services team. Our team has completed thousands of successful implementations in North America and our consultants are highly experienced in the process of inventory management.

### Easy Implementation

When companies call MarginPoint looking for help managing their inventory, many are surprised at how easy our system is to implement. After becoming a customer, the process starts with a simple phone call and a MarginPoint consultant will guide you through the entire step-by-step process.

#### Pre-Implementation Call

During the first call, a MarginPoint consultant will review your current inventory management process to understand your goals moving forward. The consultant will then gather a list of your suppliers and parts to begin building your inventory system remotely, allowing you to continue your day-to-day operations without delay. MarginPoint understands that every day your trucks are not on the road can cost you thousands. Our simple process ensures the least amount of downtime for your company and technicians.

### The Facts About Our Experts



30k+ Consulting Hours Completed



18k+ Face-to-Face Hours Training Customers



3k+ Stocking Locations Optimized

**Current customer, Michael Fox with Aux Home Services, expressed how pleased he's been with our team:**

**"MarginPoint is different. They've been great. You get on the phone with them and the next thing I know we've got five people on the phone together, figuring out an issue if there is one. They take feedback and they want to use it to improve the software. They're willing to build the software based on how you need to use it and that's what's so awesome about it."**



## On-Site Setup and Training

Your MarginPoint consultant will schedule an on-site visit to finalize the implementation process. At this stage, changes can be made to your catalog of items, minimum and maximum quantities of inventory on-hand can be set, and inventory replenishment methods solidified. This will typically take about two days and will include training for the administrative team, as well as mobile training for technicians.

- Trainings can take as little as thirty minutes
- You will receive training materials and catalog label booklets (with QR/barcodes pre-setup) for the mobile users
- Consultants will assist you with cycle counting stock for set up and evaluating current inventory levels at each stocking location to maximize efficiency

## Follow-Up Optimization

MarginPoint offers ongoing support for the life of the account to assist you with any questions you may have. Our consultants will help you add new trucks or technicians to your inventory system or help you adjust for seasonal usage. We also offer optimization reports on suppliers, vendors and parts to help you save money across your entire organization.

MarginPoint is always working to make inventory control more efficient for companies of all sizes. We understand that every company is different. That's why we work with you to identify your company's unique needs and create solutions that meet those needs.

## Simple, Powerful Technology

- Cloud-based software powered by Microsoft Azure ensures automatic updates and real-time, constant visibility of all of your inventory
- Ability to integrate with ERP and business applications via open API platform framework
- Mobile app available for both iOS and Android devices
- No need for costly hardware, perform transactions in the palm of your hand
- Mobile optimized with full set of transactional capabilities to capture material usage, even without cellular service
- Includes functionality for barcode and QR code scanning

### Additional Services Provided

- U.S. Based Support Services
- Education & Training
- Data Services
- Business Process and Advanced Product Use
- Reporting Key Performance Indicators (KPI's)
- Dashboard Visualizations

For more information please visit us at:  
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