

Basecamp Training Sample

Paperless Project - For all jobs (Temporary/Permanent/Dealership/Marina/Other)

<IMMIX#/Job#> - <Name of Site, City>, (Team Lead/ISC/Sales), [MFG Complete Date], [LIVE date] <2nd line list equipment>

[Who will be invited?](#)

24 people will be automatically invited

[5 Discussions](#) [128 To-dos](#) [10 Text documents](#) [Events](#) Add the first: [File](#)

Discussions

[Post a new message](#)

[Watch a quick video about Discussions](#)

-  Don A. [Original Key Dates for Project](#) - Manufacturing Complete: Date Start Deployment: Date for Burn In: Date for Go Live:
-  Don A. [Notes Concerning Job Delays and updates](#)
-  Don A. [Project Contact List](#) - Enter the contact information for the following contacts (GM, IT, Electrician, Sub Contractor, Roofer and etc.) Name: Position Title: Cell Phone: Email Address:
-  Don A. [IMMIX Log in Credentials](#) - Contact Name: Email Address: Username: Password:
-  Don A. [A03 - Accounting Approval \(Add Customer Account...](#) - • Accounting has verified that the clients credit application is sufficient to move forward and Credit Report is good to move forward. • Accounting has created a Client Account in 1

To-do lists

[Add a to-do list](#)

[Watch a quick video about To-Do Lists](#)

Approvals

Sales, Executive, and Accounting tasks

- ☐ A01 - Sales Representative Received Signed Agreement from Customer (Add Date in Comment) Sales
- ☐ A02 - Executive Approval Sign Off (Add Date in Comment) Tasks S01 through S05 completed. Nathan Mah
- ☐ A03 - Accounting Approval (Add Customer Account Number on 2. Cover Page) 1 comment kmclean@vanfire.com

Sales

Sales Tasks

- ☐ S01 - Upload Signed Contract Agreement to Basecamp Sales
- ☐ S02 - Upload Quoting Form and Financial Summary to Basecamp Sales
- ☐ S03 - Upload Completed Dispatch Protocol to Basecamp Sales
- ☐ S04 - Upload Camera Throws to Basecamp Sales
- ☐ S05 - Upload Camera Views to Basecamp Sales
- ☐ S06 - Introductions of RG Team via Phone/email to the Client and their Team Sales
- ☐ S07 - Meets with Client and goes through Night Walk Test Report and updates ISC Sales
- ☐ S08 - Sales Roll Out Meeting with Client Sales

[Add a to-do](#)

Operations

Operations and ISC Tasks

- ☐ Project Acknowledgment Date: Cynthia
- ☐ O01 - Assign Job to ISC Cynthia
- ☐ O02 - Set up Job in Sedona ISC
- ☐ O03 - Assign IMMIX Number to 2. Cover Page ISC
- ☐ O04 - Revise Basecamp Project Header to reflect the updated details ISC
- ☐ O05 - D&F Stage 2/3 Scheduling (Add Date) ISC
- ☐ O07 - D&F Stage 4 Scheduling (Add Date) ISC
- ☐ O08 - Client Responsibility Email sent as a follow up to the introduction ISC
- ☐ O09 - Quote Request for Pole/Post Installation/Electrical/Roof Jacks ISC
- ☐ O10 - Submit a request for a locate (Call before you dig) and upload documents to Basecamp File. ISC
- ☐ O11 - Apply for a F.A.R.P. Permit ISC
- ☐ O12 - Arrange Lock Block Delivery ISC

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- ☐ O13 - Customer's Power is ready and available on-site ISC
- ☐ O14 - Schedule Auger Company and coordinate with Site Superintendent to Install Poles. ISC
- ☐ O15 - Bucket Truck / Boom Lift Reserved ISC
- ☐ O16 - Sedona Tasks Updated ISC
- ☐ O17 - Night Walk Test Scheduled ISC
- ☐ O18 - Complete Burn-in Checklist and Request Site to go Burn-in ISC
- ☐ O19 - Complete Go-live Checklist and Request Site to Go-live ISC

[Add a to-do](#)

Design Stage

Security Specialist, and Lead Technician tasks

- ☐ D01 - Go through Scope of Work Questions with Client SecuritySpecialist@gmail.com
- ☐ D02 - Complete Camera Map and upload to Basecamp SecuritySpecialist@gmail.com
- ☐ D03 - Complete IR Map and upload to Basecamp SecuritySpecialist@gmail.com
- ☐ D04 - Complete Wifi Map and upload to Basecamp SecuritySpecialist@gmail.com
- ☐ D05 - Complete Wiring List and upload to Basecamp SecuritySpecialist@gmail.com
- ☐ D06 - Save all documents to L: SecuritySpecialist@gmail.com
- ☐ D07 - D&F Stage 3 Completed SecuritySpecialist@gmail.com
- ☐ D08 - Assign Lead Technician to Project and invites them to Basecamp Project. SecuritySpecialist@gmail.com

Production/Manufacturing

Supply Chain Tasks

- ☐ Scheduled Manufacturing Completion Date: Aleksei Bulavko
- ☐ P01 - Review Scope of work details, and equipment recipe. Complete 7. Manufacturing Details. Aleksei Bulavko
- ☐ P02 - BOM and Optional Parts Ordered Aleksei Bulavko
- ☐ P03 - Scheduling Board updated and Job is released into Production. Aleksei Bulavko
- ☐ P04 - IMMIX Programmed Aleksei Bulavko
- ☐ P05 - Equipment Powered up Aleksei Bulavko
- ☐ P06 - Equipment Programmed Aleksei Bulavko
- ☐ P07 - Device IP List Saved to Project Folder in L Drive Aleksei Bulavko
- ☐ P08 - QA Completed and uploaded to Basecamp and saved to L: Aleksei Bulavko
- ☐ P09 - Equipment Serial Number and Equipment Number saved to Equipment List in L: Aleksei Bulavko
- ☐ P10 - Equipment prepped for Shipment or Deployment Aleksei Bulavko
- ☐ P11 - Equipment Shipped or Deployed Aleksei Bulavko
- ☐ P12 - Unused Parts returned back to inventory Aleksei Bulavko
- ☐ P13 - Sedona Tasks and information updated Aleksei Bulavko

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Installations

Lead Technician and Installation Tasks

- ☐ Scheduled Go Live Date: ISC
- ☐ Safety: Complete Fall Protection Plan - Upload to Basecamp Lead Technician
- ☐ Safety: Complete Field Level Hazard Assessment - Upload to Basecamp Lead Technician
- ☐ I01-planning for installation Lead Technician
- ☐ I02 - Poles/Posts/Roof Jacks Installed Lead Technician
- ☐ I03 - Confirm with Client the Tec Cable is connected to temporary power Lead Technician
- ☐ I04 - Equipment Delivered to Site Lead Technician
- ☐ I05 - Equipment Installed Lead Technician
- ☐ I06 - Equipment Powered up Lead Technician
- ☐ I07 - Cameras Aimed Lead Technician
- ☐ I08 - IR's Aimed Lead Technician
- ☐ I09 - System Commissioned Lead Technician
- ☐ I10 - Radius Contact Signs installed Lead Technician
- ☐ I11 - Red Handed Banners installed Lead Technician
- ☐ I12 - Commissioning Report Completed and uploaded to Basecamp Lead Technician
- ☐ I13 - IMMIX Finalized (Maps, Schedules) Lead Technician
- ☐ I14 - Run Alarm Report from New Service and review False Alarms prior to Burn-in Request Lead Technician
- ☐ I15 - Customer Orientation, Remote Access Set-up Lead Technician
- ☐ I16 - Night Walk Test Preparation Lead Technician

Dispatch Protocol

Manitou Account Set-up Checklist

- ☐ Make Sure There is only 1 account number required Sharon Hunt
- ☐ Confirmation of Site Name Sharon Hunt
- ☐ Confirmation of Site Address Sharon Hunt
- ☐ Site Contact(s) Name, Phone Number, and Email Addresses Sharon Hunt
- ☐ After Hour Entries to Site Sharon Hunt
- ☐ Dispatch Procedures Sharon Hunt
- ☐ Emergency Dispatch Numbers Sharon Hunt
- ☐ Arming and Disarming Schedule / Operation Hours Sharon Hunt
- ☐ Permit Numbers Sharon Hunt
- ☐ Passcodes Sharon Hunt
- ☐ Special Notes Sharon Hunt
- ☐ Asterisk placed on person who should receive reports Sharon Hunt
- ☐ Action Patterns Sharon Hunt
- ☐ Add system programming lines for SBA Activations Sharon Hunt
- ☐ Assign Guard Service Sharon Hunt
- ☐ Check if Security Account online and put as related to IMMIX Account Sharon Hunt
- ☐ Dispatch Protocol Finalized Sharon Hunt
- ☐ From New Service run Event Pivot Table report for this site since date of burn in to current date to check on amount of false alarms. If any cameras triggered more than 5-10 false per day have technician investigate Sharon Hunt

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Burn-in Check

ISC Checklist before Requesting Burn-in from the Monitoring Station

- ☐ Ensure that Commissioning Checklist and Manufacturing QA inspection is completed and attached to Basecamp Files. ISC
- ☐ Night Walk Test has been conducted (for non-construction site), and completed Report has been attached to Basecamp Files. ISC
- ☐ F.A.R.P. Number Added ISC
- ☐ Programming in IMMIX - Cross Reference schedule and address with Manitou Account. ISC
- ☐ Programming in IMMIX - Immix Maps with Compass Rose, hyperlinks and title blocks confirmed. ISC
- ☐ Programming in IMMIX - If PTZ installed, check operation (turn left, right, up, down, zoom), check presets, hyperlinks. ISC
- ☐ Programming in IMMIX - Ensure clips are loading in IMMIX and that alarm description matches linked camera. ISC
- ☐ Lock Box on-site and passcode is provided. ISC
- ☐ Ensure no outstanding tickets in SpiceWorks has been left unresolved ISC
- ☐ Confirm existing Guard is on-site. ISC
- ☐ Notify Operations Manager, Central Station Manager and Sales Rep of Burn-in request. ISC
- ☐ Once Burn-in request is approved, take account off test in IMMIX. ISC
- ☐ Move IMMIX parent account from "Non-Active Group" to "Active Sites". ISC
- ☐ Email Burn-in notice to customer and follow up with a phone call. ISC
- ☐ Add Burn-in Date ISC

Go-Live Check

ISC Checklist before Requesting to Go-Live from the Monitoring Station

- ☐ Ensure the internal Security System is hooked up to the RG Control Panel (Typically on Permanent Sites). ISC
- ☐ Sedona - Add Contract end in "Custom Field", that is associated with the length of term in the Agreement. ISC
- ☐ Sedona - Start RMR Billing Cycle. ISC
- ☐ Sedona - Approve Job Tasks. ISC
- ☐ Confirm Equipment, Serial Number and Equipment Numbers are added to the "RG Product Equipment List" Spreadsheet in L Drive. ISC
- ☐ Sedona - Confirm Equipment, Serial Number, Equipment Numbers, SIM Card, and Optional Products are added to Jobs / Custom Field Area. ISC
- ☐ Spiceworks - Ensure no outstanding tickets has been left unresolved. ISC
- ☐ Notify Operations Manager, Central Station Manager, Sales Rep that system is ready to Go-Live. ISC
- ☐ Email Go-Live notice to Customer and follow up with a phone call. ISC
- ☐ Add Go-Live Date ISC

Job Closing Check

ISC Checklist when closing a Job

- ☐ Review Agreement and confirm contract terms is in line with what is recorded in Sedona. ISC
- ☐ Ensure Monitoring is Live: Enter Date in comments. ISC
- ☐ Ensure Install was properly billed during Job creation: Enter details in 9. JOB FEEDBACK DETAILS. ISC
- ☐ Ensure RMR Invoicing has been created: Enter values in 9. JOB FEEDBACK DETAILS. ISC
- ☐ Ensure all time card entries have been recorded. ISC
- ☐ Have all unused parts and materials been returned to the Warehouse and make sure Jason process return, in Sedona, before month end. Be sure Jason knows the Job #. ISC
- ☐ All Purchase Orders affiliated with the Job are entered and received: Subcontractors, equipment rental, miscellaneous purchases. ISC
- ☐ All Employee expense reports, chargeable to the job, submitted to AP. ISC
- ☐ Reconcile Parts "Materials": Parts Qty, = Issued Qty. (Check for red colored line items in Sedona?"Jobs/Tools/Parts Reconciliation") ISC
- ☐ Update Notes on Account in Sedona ISC
- ☐ Review that all job tasks are completed in Sedona. ISC
- ☐ Confirm Job Costing was complete by Operations Manager Don Azcona
- ☐ Inform CFO, Accounting, Remote Guarding Department Manager, and HR of completion. ISC
- ☐ Archive Basecamp Job. Don Azcona

Basecamp Training Sample

1. Remote Guarding qualifying questions for presentation

1. Company name, address, contact information etc.
2. Confirm roof access will be permitted for site visit
3. Google Map – forward to customer, ask them to add any buildings and key areas of interest
4. Ask customer for Site plans
5. Ask the following Questions/gather the following information:
 - What are the security measures currently in place?
 - What are the strengths and weakness of the current security measures?
 - Using guards? If so, what is monthly cost?
 - Ask customer is they would like access to areas of the site (this would be an add on-not part of the rg3 solution)?

2. Cover Page

Customer Account #:

IM#:

Bird Dog:

Peg Assist:

Commission (1 or 2):

No. of Months:

Proposal #:

Sales Person:

Milestone	Date	Month #
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Note

Demolition Started:

Excavation Started:

Substructure Started:

Superstructure Started:

Occupancy:

End of Contract:

Client Name	Title	Telephone
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Customer Address

3. Dispatch Protocol

Name of Company:

Site Address:

F.A.R.P. (If Applicable):

Guard Company for Site:

Site Contact List (In Priority)

Name	Password	Email
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Telephone #	Reports sent Y or N
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Site Password:

Monday:	AM	PM
Tuesday:	AM	PM
Wednesday:	AM	PM
Thursday:	AM	PM
Friday:	AM	PM

Customer Address

4. Design & Finalize Stages:

Stage -1 – Signed Contract Submission

Stage -2 – Prepare for Site Meeting

Stage -3 - Finalizing Scope of Work Details with the Customer

Stage -4 – Project Hand Off

Stage - 1 - Signed Contract Submission

- Sales advises Radius Security Operations of having a SIGNED contract.
- RSO assigns Project to ISC.
- ISC Sets up Job in Sedona and updates Basecamp.
- ISC schedules Team Lead and Sales person for Site visit.
- Prep for Site Meeting
- Site Meeting and Post Site Meeting Actions
- Design and Finalize Mtg
- Expectation is that the first meeting is done within a week.

5. Scope of Work Details

Job #:

IM:

Customer:

1. Confirm Site Address?
2. Confirm the equipment (RG1, RG3, PODS, RG6, RG8, RGX, VideoFied, etc.)?
3. If RG3, identify LH/RH panel, confirm location, and consider additional space for battery back up?
4. What Security Solution Strategies are being deployed?
 - Full Perimeter Coverage
 - Partial Perimeter Coverage
 - Exit Entrance Protection
 - Entire Area Protection
 - Partial Area Coverage
 - Choke Points Coverage
 - Asset Protection Coverage
 - A combination of the above

6. Stage 4 Meeting Notes (IM#, Job #, Customer Name)

Date:

Attendees:

Equipment:

Items Discussed:

LIVE DATE:

DEPLOYMENT DATE:

MANUFACTURING COMPLETION DATE:

Action Items:

Sales:

Installation Technician:

ISC:

7. Manufacturing Details

8. Installation Details

9. JOB FEEDBACK DETAILS

Installation Fee Invoice #:

Amount: \$

Proportionate Invoice #:

Amount: \$

For number of days:

Next RMR Cycle date: