Home Console

Navigation

- Training vs Live
- Toolbar; Sign in/Sign out, Change locations, Quick Messages Database Name, Intranet
- Support Tab; Chat Support, Personalization Settings, Help Files, Support and Community
- Search Anywhere Magnifying Glass
- Widgets

Customer Console

Customer Search

- Search by; first name, last name, phone number

New Customer/Company

- Customer Information – Mandatory vs not Mandatory
  - Tab Navigation:
    - Summary Tab - Recent History, Custom Fields, A/R Accounts, Tax Exemptions
    - Activities
    - Opportunities
    - Services Requests

More Menu

- Merge Customers
- Move Customer History
- Convert Company To Division

Reports – A shortcut to reach Customer Reports
Sales Console

Top Toolbar Navigation

- New Sale
- Refund
- Sales Order
- Sales Quote
- Cash Management (Single and Multi)
  - Cash In
  - New Cash Skim
  - Drawer Audit
  - Closer Drawer
  - New Cashout
- Bill Pay/Deposit

More Menu

- New Recurring Invoice
- Refund Bill Pay/Deposit
- New Petty Cash Transaction
- Check Gift Card Balance
- Update Protected Phones
- Invoice Editor

Reports – A shortcut to reach Sales Reports

New Sale

- Accessory Only Sale
- Phone Activation
  - Carrier Integration
  - PAW (Phone Activation Wizard)
- Bill Pay Flow
- Sales Order Flow
- Refund Flow
  - Refunding Products Not Sold in RQ
  - Exchanging a Sale
  - Swap for Same
Operations

iQmanager

- Modules
- Top and Bottom panes

Marketing

- New Marketing Campaign
- Update Marketing Campaign
- Marketing Type Setup
- Marketing Summary Report
- New Custom Letter
- Update Custom Letter
- Letter Category Setup
- New Form Email
- Update Form Email
- Form Email Category Setup
- Email Signature Setup

Location Setup – Refer to Settings Console Module

More Menu

- Item Category Setup
- Item Setup
- Item Scheduling
- Location Master List
- Location Task Setup
- Location Task Manager
- Sales Contest Setup

Reports – A shortcut to reach Operation Reports

Operations Modules

- Company Tree
- Modules
  - Edit – Hide/unhide
- Punch Clock
Inventory

Inventory Tree

- Search Methods
  - Enabled, Disabled, Any
- Refresh Tree

Product Creation

- Regular Product
- Non-Stocked Product
- Vendor Rebate Product
- Non-Revenue Product
- Gift Card
- Bundle
- Warranty Loan Product

Product Tabs

- Product Summary
- Details
- Purchasing
- Pricing
- Availability (only for Regular Products)

Purchase Order

- New Purchase Order
- Auto Ordering Report
- Purchase Order Tab
  - Update, Receive, Complete

Transfer

- Quick Ship Transfer
- New Transfer Request
- Auto Transfer In/Out Reports
- Transfer Tab
  - Update, Ship, Receive, Complete

RMA

- RMA Tab
  - Update, Ship, Receive, Reject, Complete
Count Sheet

- New Count Sheet
- Update Non-Committed Count Sheet
- Update Committed Count Sheet

More Menu

- Cost Adjustments
- Quantity Adjustments
- Inventory Removal
- New Carrier Pricing Sheet
- Update Carrier Pricing Sheet
- Price Sheet Promotion Setup
- Price Sheet Term Setup
- New SOC Mapping Sheet
- Update SOC Mapping Sheet
- Warranty Loaner Product Inventory
- Warranty Loaner Category Setup

Maser Lists – see Reports Console

Import Wizards – see Settings Console

Reports – A shortcut to reach Inventory Reports

Employees Console

New Employee

- Mandatory Fields
- Summary Tab
  - Security Role (what it affects)
  - Email Settings
  - Assigned Locations
- Activities Tab
  - Create a New Activity
- Documents/Reviews
  - Attached Documents. Ex/ Employee contracts
- Time Off Tab
  - RTO
  - Intranet
- Work History
  - Keeps a timeline of the Employees Work History (unadaptable)
• Admin Tab (can be hidden)
  o Personal Information
  o Compensation Information
  o Insurance Information
  o Employee Details

Role Management - H/R Roles

• Create H/R Tree
• Within each Profile you assign an H/R Role
• Within each H/R Role you can set Rules
  o These Rules affect each employee set to this role.
• Force Punch In
• Idle mins for Lock Screen
• Key Metrix Tab
• Training Tab
• Documents Tab
• Widgets
  o Lock Widgets to Home Console

H/R Scheduling

• Employee View vs. Calendar View
• Filters:
  o Location
  o Roles (H/R Roles)
  o Sort by
• Make New Shift (Right Click)
• Copy Row, Column, Entire Schedule
• Print, Export (Weekly Spreadsheet)
• Revise Punches
• Time and Attendance (per location)
  o Setting Week Starts
  o Overtime
  o Filters for Mass Setup

More Menu

• Scheduling Setup – Store Hours
• Revise Punches
• Time Off Ledger Import
• Employee Master List
• Security Role Assignment
• Employee Transfer Master List
• HR Map

Reports – A shortcut to reach Employee Reports
Finance Console

**Finance Modules** (per Location)

- Cashouts
- Process Metrix
  - Inventory, Transfers, RMAs, Services Requests, etc

**Cash**

- Reconcile Cashouts
- Petty Cash Reconciliation
- Access to other Cash Functions and Reports

**Purchase Order**

- Reconcile Receiving Invoices
- Access to PO Reports

**Rebates**

- Reconcile Vendor Rebates
- Reconcile Charge Backs
- Vendor Account Journal

**Bill Pay / Deposit**

- Reconcile Vendor Deposits
- Refund Bill Pay / Deposits and Vendor Deposits
- Access to Reports and Setup

**Accounts Receivable**

- New A/R Account
- Update Account
- Pay off Account
- Setup New Recurring Invoice
- Bill Recurring Invoices
- Access to Reports

**G/L**

- Update Exported Status
- G/L Account Activity Report (also in Reports Console)
- Access to Reports and Setup
More Menu

- Commission Ledger Entry
- General Reconciliation
- Budgeting:
  - Reporting
  - Category Setup
  - Account Setup

Reports

- Access to finance reporting (all available in Reports Console)
  - A/R Reports
  - Tax Reports

Reports Console

Reports in General

- Over 400 canned reports
- Categories
- Search Filter
- Favorites
- Custom Reports

Sales Reports

- Product Detail Report
- Sales by:
  - Category
  - Customer
  - Employee Invoice
  - Location

Payment Reports

- Cash Audit Trail Report
- Payment Type Audit Report
- Discount Summary Report
- Manager Override Report
- Refund Summary Report
- Payment Integration Transaction by Date Report
- Activation Gross Profit Report
Inventory Reports

- Inventory Listing Report
- Inventory Totals by location Report
- Aged-Serialized Inventory Report
- Stale Inventory Report
- Purchase Order Detail Report
- Complete Purchase Order Report
- Auto Ordering Report
- Min/Max Pricing Adjustment
- Min/Max Calculator

Count Sheets

- Physical Inventory Counts
- Count Sheet History Report
- Adjustment History Report

Dashboards

- Executive Dashboard
- Pocket Dashboard
- Store Dashboard

Performance Groups

- Performance Group Setup
- New Performance Targets
- Update Performance Targets
- Period Setup

Performance Group Reporting

- Performance Group Report
- Performance Metrix Report
- Performance Metrix Summary Report
- Graphed Performance Metrix Report
- Widgets
Settings Console

Search Options and Categories

- Filtered by keywords
- Categories are sorted per Console

Company Settings (Business Rules)

- Account Security
- Commission
- Company
- Credit Card Security
- Customers
  - Payment
  - Service Requests
  - Mandatory Fields
- Employees
- Finance
- Inventory
- Language
- Marketing
- Printing
- Refunds
- Sales
  - PAW
  - Invoice
- Transaction Authentication

Workstation Settings

- Batch Scanner
- Cash Drawer
  - General
  - Cash Drawer
- Fingerprint Scanner
- General
  - General
  - Export
  - Display
- Payment Devices
- Payment Integration
Select Integration Provider

- Printer
  - Defaults
  - Printer Setup
    - Full Size Printer
    - Till Tape Printer
    - Label Printer
- Cash Drawer
- Signature Capture Device

Finance Settings

Inventory Settings

Sales Settings

Employees Settings

Customers Settings

Integration Settings
Day in the Life of a Sales Rep

The Sales Person session will introduce participants to the key components of the sales process in RQ. This material will provide an overview of the sales console placing emphasis on the tasks encountered on a day-to-day basis by a salesperson. The objective of this session is to provide participants with the knowledge necessary to conduct sales and operational tasks in the wireless retail environment. Covered material is geared towards all users who are both customer-facing, as well as administrative staff, looking to see how the program functions in the store environment.

Introduction

- Overview of each Console they have access to.
- Home Console:
  - Toolbar; Sign in/Sign out, Change locations, Quick Messages Database Name, Intranet
  - Support Tab; Chat Support, Personalization Settings, Help Files, Support and Community
  - Search Anywhere Magnifying Glass
  - Widgets

Talk to the follow:

- Customer Console
- Sales Console
- Operations
- Inventory
- Reports
- Workstation Settings

Morning Shift

- Signing In
- Punching In (differences between the two)
- Cash In
- Check if any Shipments came in; might have to receive Purchase Orders
- Inventory Count – Count Sheets
  - New Count Sheet
  - Start Counting (Update Non-Committed Count Sheet)
- Checking Operations Console
  - Activities
  - Call Backs
  - Tasks
- Check Quick Messages
- Bulletin Board
Customer Interaction
- Search for or Create a New Customer
  - Mandatory Fields
  - Decline email
- Sales Opportunities
- Sales Activities
- Sales
  - Phone Activation (PAW)
  - Explain Suggested Sells
  - Accessory Sale
  - Split Commission
- Sales Order
- Bill Pay/Deposit

Downtime
- Check Commission Reports/Widgets
  - Confirm commission was correct
- Check Operations Console
  - See if there are any Activities, Call backs, or follow-ups assigned to you
  - Update as you go

Customer Interaction
- Refunding a Sale that was not performed in RQ
- Refunding a Sale
- Exchange
- Swap for Same
- New Phone Activation with Insurance attached (optional)
- New Phone Activation with a Trade Up (optional)

Midday/Shift Change
- Cash Audit
- Cash Skim
- Punch out
- Sign out

End of Day
- Cash Out Single Drawer
- Cash Out Multi Drawer
  - Close Drawer
- Troubleshooting any issues
  - Cash Audit Trail Report
Day in the Life of a Store Manager

The Store Manager session will introduce participants to the key components of the sales process in RQ with a focus on management. This session will provide an overview of the sales console placing emphasis on the tasks encountered on a day-to-day basis by a Store Manager. The objective of this session is to provide participants with the knowledge necessary to conduct sales and operational tasks in the wireless retail environment. Covered material is geared towards all users who are playing a management role in the store environment.

Introduction

- Overview of each Console they have access to.
- Home Console:
  - Toolbar; Sign in/Sign out, Change locations, Quick Messages Database Name, Intranet
  - Support Tab; Chat Support, Personalization Settings, Help Files, Support and Community
  - Search Anywhere Magnifying Glass
  - Widgets

Talk to the follow:

- Customer Console
- Sales Console
- Operations
- Inventory
- Reports
- Workstation Settings

Morning Shift

- Signing In
- Punching In (differences between the two)
- Operations
  - Check Employees Duties for the day
- H/R Schedule
  - Who should be coming in and when
- Sales Contest
  - Create a New Sales Contest for the Day! Motivate Staff!

Check Status of Yesterday’s Sales and Last Night’s closing: Run Reports

- Cashout Summary Report
- Cash Audit Trail Report
- Store Dashboard
- Sales by Location Report
- Sales by Employee Report
- Performance Metrics Summary Report
- Performance Group Report
- Milestone Progress Report

**Check Sales Reps Activity**

- Auto Punch Out Report
- Manager Time Sheet Approval Report
- Login Audit Report – confirm they were logged in.
- Activity Tracking Report
- Call Back Report
- Graphed Sales Contest Report

**End of Day**

*If set up for Multi-Drawer Cash Terminals;*

- Cash out all Rep’s Closed drawers.
Day in the Life of an Inventory Manager

The Inventory Management session will introduce participants to the key components of managing inventory in RQ. This session will provide an overview of the Inventory console with a focus on: the creation and maintenance of products, purchasing and receiving products, Stock transfers, the RMA process, Quantity and Cost adjustments, as well as the physical Inventory Count process. The objective of this session is to provide participants with the introductory knowledge necessary to begin working in the Inventory console. Covered material is geared toward users whose responsibilities include inventory management.

Introduction

- Overview of each Console they have access to
- Home Console:
  - Toolbar; Sign in/Sign out, Change locations, Quick Messages Database Name, Intranet
  - Support Tab; Chat Support, Personalization Settings, Help Files, Support and Community
  - Search Anywhere Magnifying Glass
  - Widgets

Talk to the follow:

- Reports
- Settings
- Inventory

Setup/Inventory Rules

Settings Console

- Vendor Setup
- Vendor Account Setup
- Manufacturer Setup
- Product Category Setup
- Inventory Adjustment Reason Code Setup

Company Settings (Rules)

- Setting up rules for different scenarios throughout Inventory Management
  - Ex/ Sorting Product Category Tree, Count Sheet Rules, RMA Rules

Inventory Console

- Create New Products
  - Regular, Non-Stocked, Vendor Rebates, Non-Revenue, Gift Card, Bundle
- Product Import Wizards for mass entries (refer to Settings Console)
- Tabs within each Product
  - Details, Purchasing, Pricing, Availability, Commission, Compatibility
• Purchasing – Set Min/Max Quantities (Min/Max Adjustment Report)

Price Sheet Term Setup

Carrier Pricing Sheet

• Create New – Copy Existing
• Update Sheet

Price Sheet Promotion Setup

Master Lists

• Regular Product Master List
• Non-Stocked Product Master List
• Vendor Rebate Master List
• Product Commission Master List

Morning Reporting

Reports Console – checking inventory status

• Auto Ordering Report - If you have min/max setup for your products you can run the report to see what is needed to be ordered
• Min/Max Adjustment Report
• Auto Transfer In Report
• Auto Transfer Out Report
• Inventory Availability Summary Report
• Inventory Totals by Location Report
• Non-Sellable History Report
• Count Sheet History Report
• Aged Serialized Inventory Report

Inventory Management

Inventory Console

• Create New Purchase Orders
• Update Purchase Orders
• Receive Purchase Orders
• Reconcile Receiving Invoices
• Transfers
  o Quick Ship
  o Transfer Request
• RMAs (Return Merchandise Authorization)
• Count Sheets
  o New
  o Update Non-Committed
Update Committed
  Adjustments
  • Quantity Adjustments
  • Cost Adjustments

Reporting and Troubleshooting
Reports Console
  • Complete Purchase Order Report
  • Purchase Order Detail Report
  • Purchase Order Amendment Report
  • Receiving Invoice History Report
  • Complete Transfers Report
  • Transfer History Report
  • Completed RMAs Report
  • Adjustment History Report
  • Product Tracking Report
Day in the Life of Human Resources

The Human Resources session will introduce participants to the key components of managing employee profiles within RQ4. Creating new employees, assigning security roles and employee groups, as well as commission options will be discussed. The objective of this session is to provide participants with the introductory knowledge necessary to begin working in the Employees console. Covered material is geared toward all users whose responsibilities include managing employee profiles with the required security access.

Introduction

- Overview of each Console they have access to.
- Home Console:
  - Toolbar; Sign in/Sign out, Change locations, Quick Messages Database Name, Intranet
  - Support Tab; Chat Support, Personalization Settings, Help Files, Support and Community
  - Search Anywhere Magnifying Glass
  - Widgets

Talk to the follow:

- Employee Console
- Reports
- Settings Console

Role Management - HR Roles

Employee Console

- Role Management
  - Create HR Company Tree
  - Assign Rules for Roles
    - Force Punch In (Refer to Settings – Enable Auto Punch outs)
    - Idle time for lock screen
    - Reports to
    - Lock Widgets
    - Assign Training

New Employees

Employees Console

- New Employee
  - Mandatory Fields
  - Set HR Role
  - Security Role (explain difference in the two)
  - Assigned Locations
  - Email Setup

- Documents
Upload any HR related documents into Documents/Reviews Tab

- **Admin Tab**
  - Setting up Personal Information
  - Compensation Information
  - Commission
  - Employee Groups (refer to Settings)
  - Insurance Information
  - Employment Details

- **Employee Import Wizard**

**H/R Scheduling**

Employees Console

- **H/R Scheduling**
  - Time and Attendance Setup
  - Revise Punches
  - Employee vs Calendar View
  - Copy and Paste Columns, Rows and entire schedule
  - Sort/filter
  - Print and export

- **Time off Ledger Import – More Menu**
  - Intranet – RTOs
  - Scheduling

**Week prior to Payroll**

- **Time and Attendance Report**
  - Confirm Manager have approved punches

- **Employee Payroll Report**

- **Commission – Depending on how you pay, GP or Commission**
  - If using our Commission run; Commission Summary Report or Commission Details report
  - If using Gross Profit run; Sales by Employee Report or Product Detail Report

**Other H/R Reports**

- Auto Punch Out Report
- Punch Revision Report
- Clocked Hours Analysis Report
- Requested Time Off Report
- Time Off Ledger Activity Report
Day in the Life of Finance

The Finance session will introduce participants to the key components of the Finance console in RQ. This session will provide an overview on the Finance console with focus on the reporting of General Ledger activity, Cash Management, Reconciling Receiving Invoices, Accounts Receivable processes, and Bill Pay/Deposit transactions. The objective of this session is to provide participants with the introductory knowledge necessary to begin working within the Finance console. Covered material is geared towards users who have been granted security access to the Finance Console.

Introduction

- Overview of each Console they have access to.
- Home Console:
  - Toolbar; Sign in/Sign out, Change locations, Quick Messages Database Name, Intranet
  - Support Tab; Chat Support, Personalization Settings, Help Files, Support and Community
  - Search Anywhere Magnifying Glass
  - Widgets

Talk to the follow:

- Inventory
- Reports
- Settings
- Finance

Setup and Database Rules

Settings Console (Setup)

- Bill Pay / Deposit Setup
- Budget Account Setup
- Budget Category Setup
- Discount Code Setup
- Full Chargeback Reason Code Setup
- G/L Category Setup
- G/L Account Setup
- G/L Defaults Setup
- Payment Method Setup – assigning G/Ls
- Tax Setup
- Location Setup
  - Financial Tab

Company Settings (Rules)

- Setting up rules for different scenarios throughout RQ
  - Ex/ Default ‘Bill To’ Location for New Purchase Orders
- New Customers/Companies Default to accept Checks
Monthly Reconciliation

Finance Console

- Cash
  - Reconcile Cashouts
  - Reconcile Petty Cash
- Purchase Orders
  - Reconcile Receiving Invoices
- Rebates
  - Vendor Account Journal
  - Reconcile Vendor Rebates
  - Reconcile Charge Backs
- Accounts Receivable
  - New A/R Accounts (which can be done in Customer profiles as well)
  - Update A/R Accounts
  - Pay Off A/R Accounts
  - New Recurring Invoice
  - Bill Recurring Invoices
- G/L
  - G/L Account Activity Report
    - Export to Quickbooks or Great Plains
  - G/L Account List Report
  - Update Exported Status

Reports Console

- Cashout Summary Report
- Cash Audit Trail Report
- Complete Purchase Orders Report
- Purchase History Report
- Receiving Invoice History Report
- Vendor Deposit History Report
- Bill Pay History Report
- Aged Account Summary Report
- Aged Location Summary Report
- A/R Ledger Activity Report