

# The Vantage Suite

The operating system for AV, security, and low-voltage integrators. One platform to track customers, design and quote work, run the install, and support the customer for the life of the system.

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## 01 Customers & CRM

FOUNDATION

Your central customer list lives in Vantage and stays in sync with the tools you already carry — update a customer once and it's right everywhere.

### Central customer list

One source of truth for every customer, contact, and property — shared across projects, proposals, tickets, and invoices.

### Outbound sync

Push customers and contacts out to **Quo / OpenPhone, Gmail / Google Contacts, and Microsoft 365 / Outlook** so your phone and inbox always match Vantage.

### Leads & contractors

Track leads separately, and manage GC / trade-contractor relationships with their own scoped access to shared projects.

### Multi-property

A single customer can hold multiple properties and projects, each with its own address, design, and timeline.

## 02 Design & Estimating

QUOTE

The design tool is the estimate. Plot devices on the customer's floor plan and they land on the proposal in real time — organized by room, priced from your catalog.

### ON THE FLOOR PLAN

#### Plot & price live

Place speakers, cameras, access points, keypads, and alarm devices on the plan; each one appears on the proposal as you place it.

#### Design overlays

**WiFi heatmap, camera field-of-view coverage, audio coverage & zone membership, and alarm zones & partitions** — show the customer why, not just what.

#### Auto technical docs

**Network rack elevation, PoE budget, and the alarm zone list** generate from the same design — no separate drawings to maintain.

### CATALOG

#### Pre-loaded catalog

Tens of thousands of the most common AV, network, security, and automation parts pre-enrolled with **images, pricing, SKUs, and UPCs** for inventory scanning.

#### AI product import

For the outliers, screenshot-based AI importing pulls a product into your catalog — brand, model, price, description — so you're not hand-typing model numbers.

## 03 Interactive Proposals

QUOTE

Customers get a living proposal, not a static PDF.

### Interactive & live

Built straight from the design — organized by room with pricing attached. What you see is what the customer sees.

### Guest forwarding

Customers can forward the proposal to guests (designer, spouse, builder) for recommendations and input.

### Accept on the page

Accept, decline, or request changes right in the proposal — acceptance moves the project into the install lifecycle automatically.

## 04 Scheduling

INSTALL

MS-Project-grade scheduling without the project-manager degree — in contractor language, extremely easy to use.

### Phases & tasks

Pre-Wire → Inspection → Trim-Out → Closeout, with durations, scheduled vs. actual dates, and status at a glance.

### Dependency linkages

Tasks are wired together (finish-to-start with lag); hover a task to see the dependency chain draw itself, with calendar- and working-day gaps shown on each link.

### External gates

Mark tasks as gated on an outside trigger (e.g. **General Contractor notice-to-proceed**) so the schedule reflects who you're actually waiting on.

### Baseline & views

Set a baseline to track slippage; view as table or Gantt; build from reusable schedule templates.

## 05 Procurement & Reconciliation

INSTALL

The paperwork that eats margin — POs, vendor invoices, payments — reconciled with AI and minimal user input.

### Purchase orders

Generate POs from the project; track what's ordered, what's arrived, and what's outstanding.

### AI reconciliation

Vendor invoices matched to POs and payments automatically — line by line — so you see discrepancies without manual data entry.

### Vendors

Vendor records with order history feeding both procurement and job costing.

## 06 Inventory

INSTALL

A full inventory system — not an afterthought.

### Locations & bins

Track stock across warehouses, trucks, and bin locations.

### Project allocation

Allocate and pull inventory to jobs; pulls flow into job costing.

### Barcode-ready

Catalog items carry SKUs and UPCs for scan-based receiving and pulls.

## 07 Labor, Time & Job Costing

INSTALL

Know how you're doing while you can still do something about it.

### Time & attendance

Clock in / out on site, plus retroactive logging for hours that got missed.

### Timesheets + approval

A full timesheet system with manager approval; approved hours feed job costing automatically.

### Job costing

Materials, labor, and purchases roll up live into project P&L so margin is visible in real time, not at invoice time.

## 08 Service Calls

SUPPORT

Service is where integrators win customers for life. Vantage turns every visit into a clean, billable record.

### Opened either way

You open a ticket, or the homeowner does from their portal.

### Visit, labor & materials

Every visit, hour, and part is tracked to the ticket so the invoice writes itself instead of being guessed at.

### Automated correspondence

The homeowner is kept in the loop at every step — same as during the install.

## 09 Support Modules · V-Tools

EVERYDAY

Purpose-built modules that solve the everyday problems — all tied to the same project or ticket.

MODULE	WHAT IT DOES
VShot	An Instagram for your projects. Declutter your camera roll — photos sorted by project, phase, and timeline. Share with the customer (progress or record) or keep internal; customers can post punch-list items or praise.
VMeet	Track all appointments and push them to Google or Microsoft calendars. Record in-person meetings for <b>AI transcription</b> — action items, notes, and answers to every question asked. Take photos, manual notes, and sketches while recording; everything saves to the project or ticket.
VSign	Legally binding e-signature — a DocuSign equivalent for any file (proposals, change orders, agreements).
VNotes	Channels for every project — like Teams. Notes and reminders any team member can post to and reply on; the conversation about the job lives with the job.
VFiles	File management for the company, projects, and tickets — internal and customer-facing, with control over what the customer sees. Use Vantage storage or <b>bring your own</b> Google Drive / OneDrive.

## 10 Customer Portal & Correspondence

SUPPORT

A portal that makes a three-person shop feel like a three-hundred-person company.

### Self-serve portal

Customers get their own branded portal: the live proposal, invoices, files, progress photos, and service requests.

### Password vault

Every credential for the system you installed lives in the customer's portal — a password manager that's **always available** to them. The 9 PM "what's my WiFi password" call is gone.

### From your name

Automated correspondence sends from **your** email address and **your** phone number — the customer never sees a third-party brand.

### GC view-only

General Contractors get a free view-only account on your projects — design, proposal, and invoices when they're the ones being billed (with routing to the homeowner).

## 11 Network Monitoring

SUPPORT

Vantage notices before the customer does.

### Ubiquiti Site Manager

Monitor WiFi status, access points, and cameras across every customer site from one place.

### Live status map

A live map with green/red up/down status for every device at every site.

### Auto-ticket + notify

When something goes down, Vantage creates a ticket and notifies the homeowner automatically — with **quiet hours respected**.

## 12 Chat & Company Management

COMPANY

Run the company, not just the jobs.

### Chat

Company-wide chat, customer chat, and chat with affiliated contractors — tied to your projects, inside Vantage.

### Employees

Employee accounts, roles, and management.

### Time & attendance

Full time-and-attendance with timesheets and manager approval, logging to projects and service calls.

## 13 Integrations

CONNECTS

Plays well with the tools you're keeping.

INTEGRATION	CAPABILITIES
Google Workspace	Gmail sending · calendar sync · contact sync · Google Drive file storage
Microsoft 365	Outlook email sending · calendar sync · contact sync · OneDrive file storage
Quo / OpenPhone	Automated SMS to customers · contact sync
Twilio	Automated SMS for shops running their own messaging number
OAuth Sign-In	Sign in with Google, Microsoft, or Apple
Ubiquiti Site Manager	WiFi / AP / camera monitoring with auto-ticketing
Stripe	Recurring payments — memberships and routine service plans

## 14 Mobile App

FIELD

The office in the tool bag — available as a mobile-friendly PWA in any browser, or as the native iOS / Android app. Same Vantage backend, same projects, same customers.

### Two ways to run it

**PWA** (installable mobile web app) or the **native iOS / Android** app from the App Store.

### Role-aware

One sign-in, many memberships — staff, admin, customer, and cross-tenant GC/contractor — with a role switcher to move between them.

### Field navigation

Staff tab bar: Projects · Service Calls · quick-action FAB · Chat · more. Customers get Projects · Support · Chat · Monitoring.

### Built for the field

Project & service-call access, photos straight into VShot, chat, and on-site clock in/out. *Expanding* Additional modules port to mobile release by release toward App Store v1.

## 15 How Tiers Work

PLANS

Every feature is in every tier. You pay for the volume you run — not the capability. A few conveniences (branding, custom domain) unlock as you grow. Pricing is announced at launch.

CAPABILITY	STARTER	PRO	ENTERPRISE
Active projects	3	8	Unlimited
Employee seats	1	4	Unlimited
Unlimited customers	✓	✓	✓
Full platform (design, proposals, schedule, procurement, inventory, labor, service, modules, monitoring)	✓	✓	✓
Custom branding (logo + colors)	—	✓	✓
Subdomain (yourshop.thevantagesuite.com)	—	✓	✓
Custom domain (portal.yourshop.com)	—	—	✓