

# Scaffolding Software

iQuote v6.19

# New Features

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2018

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## iQuote : 6.19 (January, 2018)

### Bug fixes.

Fixed "Search" TAB in main form to "Clear" filters

Fixed duplicate customers in Job Summary report combo boxes.

### Enhancements.

Made stage Order number editable so each stage can have its own order number.

Added new TAB to setup form reference TAB – "Project Type" maintenance.

Stage in Quote	Lost to	Result	Draw Method	Estimator	Truck	Labour Crew	Plan Source	Project Type																						
<table border="1"> <thead> <tr> <th>ID</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>R</td> <td>RESIDENTIAL</td> </tr> <tr> <td>C</td> <td>COMMERCIAL</td> </tr> <tr> <td>I</td> <td>MEDIUM DENSITY</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table>								ID	Description	R	RESIDENTIAL	C	COMMERCIAL	I	MEDIUM DENSITY															<input type="button" value="Add"/> <input type="button" value="Delete"/> <input type="button" value="Exit"/>
ID	Description																													
R	RESIDENTIAL																													
C	COMMERCIAL																													
I	MEDIUM DENSITY																													

Added "Order by Plan Source" for plan option in project summary report.

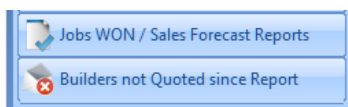
Added new report "Builders that have not quoted since..."

Added new Jobs WON report.

This report shows all jobs WON that have no "Customer requested start date"; This helps forecasting and planning by showing: Customer Project Name and first line of address with dollar values and totals of Project Type. For example a figure for Residential, Medium Density (or Industrial) and Commercial and then a total for all three Project Types.

Added new sales forecast report.

Similar to Jobs WON report but uses the "chance to win" field to pro-rata revenue. Report adds the totals by Project Type, and a grand total for all Project Types.



**Grid Customisation:**

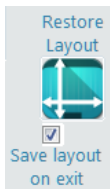
In the Quote details TAB, the grid columns may be adjusted and resized similar to the behaviour in Excel.

There is also a grid column hider settings bar which can allow you to hide unwanted columns in the Quote Details TAB and reset them anytime.

Column visibility (Click column to Toggle ON/OFF)												
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Order No	Areas	Stage Type	Stage Name	Stage Details*	Hire Per Week List	Hire Per Week % Discount	Discounted Day Rate	Minimum Days*	Day Rate	Day Rate % Discount	Discounted Day Rate

Your preferences are automatically saved if the “Save Layout...” check box is ticked.

When you enter a new session of iQuote, your preferences are can be restored by clicking on the “Restore Layout” button.



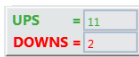
## JobsBoard : 1.27 (January, 2018)

### Jobs Board Enhancements

Display "INACTIVE" labour suppliers. Previously "INACTIVE" suppliers were not displayed and so "history" of suppliers was not available. "Inactive" suppliers are disabled in the drop down list and cannot be selected.

Comments column to have colour coding similar to customer/job columns

Added "UPS" and "DOWNS" counts to header of main form.



Added a New "Daily Jobs" form. This displays jobs per day for the current week (in a similar way as the main JobsBoard screen).



Crew	Numbers	Job No.	Job Type	Customer	Site	JACKS/TWP/DECKS	Job Order	7AM Checkin	1PM Checkin	Rollover	Comments
ABC SCAFFOLDIN	0	14135-1	UP	CONSTRUCTIONS AUS	Southport						
ABC SCAFFOLDIN	0	14577-1	VO	NEW HOMES	Coorparoo	ON CHARGE					
BETTER SCAFFOLD	0	13811-1	DOWN	MASTER HOMES	Bridgeman Downs	46-3.5-2					
BIG CREW	0	14074-1	DOWN	New HOMES	Underwood						
BIG CREW	0	13110-2	P/DOWN	ABC PTY LTD	Maroochydore	ongoing					
BILLS LABOUR	0	14433-1	UP	ABC PTY LTD	Rochedale	50-5.5-3					
BILLS LABOUR	0	11187-2	UP	XYZ HOMES	Tarragindi	76-8.5-4					
BULD SCAFFOLDI	0	14997-1	DOWN	NEWBUILD	Upper Kedron	14-4.0-2					
LABOUR SUPPLIE	0	14384-1	UP	QUALITY HOMES	Palmview	62-4.0-2					
LABOUR SUPPLIE	0	11904-3	VO	XYZ HOMES	Bridgeman Downs	ON CHARGE					
NEW SCAFFOLDI	0	14207-1	DOWN	HTW HOMES	Scarborough	52-3.5-2					
OWN	0	14388-1	UP	BUILD HOMES	Upper Kedron	50-3.5-2					
OWN	0	14316-1	UP	HOMES (QLD) PL	Mango Hill	42-3.5-2					
OWN	0	11904-3	VO	GOLDEN HOMES	Bridgeman Downs	NO CHARGE					
OWN SCAFFOLD	0	13500-1	P/DOWN	CUSTOM BUILDERS PT	Forestdale	69-4.0-2					
XYZ HIRE	0	14110-1	DOWN	HOMES (QLD) PL	Mango Hill						
XYZ HIRE	0	13865-1	UP	AUS HOMES	Paradise Waters						
XYZ HIRE	0	10004-1	UP	DESPATCH							

Greatly improved performance for "Add New Job(s)".

## JobsBoard : 1.19 (July, 2017)

### Jobs Board Enhancements

Added colour coding to the Jacks/TWP and Project columns.

When importing jobs from iQuote, now checks if customer already exists in Jobsboard and if not then Pops up "Has this NEW customer completed a Credit Application YES / NO". If YES, then Proceed but put a flag in so that payment must be received before dismantling. If NO, then do not allow import in to jobs board.

When "Dismantle" is selected from the "Action" drop down, if this is for a NEW client then pops up "Has the NEW Customer Account been paid? "YES" / "NO".

Yes will allow the user to select "Dismantle" from the "Action" drop down and it will also allow new actions and dismantles for this new customer. NO will not allow "Dismantle" to be selected from the "Action" drop down.

## **iQuote : 6.10 (March, 2017)**

### **Added iRent users screen.**

You may now add new iRent customers directly in iQuote.

### **Added “Quote added” date to Quote section of main iQuote screen.**

The “Quote added” date is used by the new Plan Source report.

### **Added Plan Source TAB to setup screen.**

Plan Source options can now be maintained (Add/Edit/Delete).

## JobsBoard : 1.17 (January, 2017)

### Jobs Board Enhancements

Added an "Active" column to the Labour and Transport supplier list form so that suppliers may be flagged as "Active" / "Inactive". Enhanced the Labour/Transport supplier drop down combo's to only show "Active" suppliers.

Jobs may be archived and the archives may be restored by date or job range.

Jobs may be archived and the archives may be restored by date or job range.

Jobs may be flagged as "Do not dismantle" with a message "Approval required" if an attempt is made to set a job's action to "Down" or "Finish down" (dismantle).

"Action" column in main Jobsboard form now has colour coding similar to customer/job columns.

Export to excel now handles filters on Customer/Site/Job No and Project.

## iQuote : 6.000 (June, 2015)

### New Print Variations functionality.

On the quote details page there are 2 new columns in the grid:

1. Select (check box)
2. Quote Type – currently there are only two quote types – Variation and Contract

You may select as many of the stages as you like. There is a new “Print Selected” button. This is for printing “Variation” quotes for the stages that are selected.

STAGE DETAILS					INITIAL HIRE PERIOD				ADDITIONAL HIRE PERIOD			
Order No	Areas	Stage Type	Stage Name	Stage Details*	Hire Per Week List	Hire Per Week % Discount	Minimum Days*	Discounted Day Rate	Day Rate % Discount	Day Rate	Discounted Day Rate	
<input type="checkbox"/>	Plant 1	Variation	Main Scaffold	More insulation and scaffolding by	1400.00	50.00	28	100.00	0.00	143.00	143.00	
<input checked="" type="checkbox"/>	Plant 1	Contract	Perimeter Scaffold	Insulation and Scaffolding	300.00	0.00	28	42.86	0.00	43.00	43.00	

### Quote Details page enhancements

The grid headers have been enhanced to allow horizontal scrolling while maintaining component section headers in sync with their corresponding columns.

### Export won job to iRent fix

The issue with the option in the setup screen that allows won jobs to be automatically imported into iRent as an advanced contract job has been fixed.

### Cosmetic enhancements

Cosmetic enhancements to main iQuote screen.



## iQuote : 5.200 (January, 2015)

### New Plan Source Report

Added a "Plan Report" option to the Project Summary report and added an "Order by Rep" option. In conjunction with this new report, added a new drop down combo box to the customer area of the main screen "Plan Source" which can be set to be mandatory if desired in in the setup screen. Sample plan sources are: Builder Direct, Client Services and Rep.

### Jobs PLAN Report

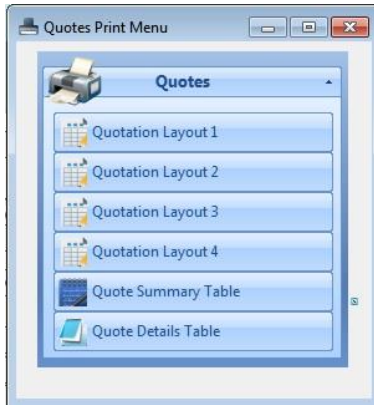
Page: 1

Proj. No	Quote No	Project Open Date	Rep	Customer Name	Site Address	Plan Source
1004	- 1	01/05/20	BS	REV 0002 WINCREST SCAFFOLDING	211 SOUTH STREET	BUILDER DIRECT
1004	- 2	01/05/20	RA	ALL ABOUT TURF	211 SOUTH STREET	CLIENT SERVICES
1004	- 3	01/05/20	ON	RRRR	211 SOUTH STREET	REP
1004	- 4	01/05/20	ON	RRRRR	211 SOUTH STREET	BUILDER DIRECT
1005	- 1	08/05/20	AY	ABDUL AKBAR CONSTRUCTIONS	SITE ADDRESS	REP
1008	- 1	14/05/20	SM	3AK CONSTRUCTIONS - TESTING GOOD.		CLIENT SERVICES
1007	- 1	02/08/20	KA	RAWCORP P/L		BUILDER DIRECT
1008	- 1	08/08/20	MA	WELCOME SCAFFOLDING		BUILDER DIRECT
1008	- 2	08/08/20	MK	INTEGRATED SCAFFOLD SYSTEMS		REP
1009	- 1	24/08/20	MA	FREE FORMAT CUSTOMER		BUILDER DIRECT

### New Quote Details Table Report

This is the "detailed" version of the Quote Summary Report located in the Print Quote option. It includes most of the columns from the grid in the Quote Details TAB of the main screen.





Job No. **1004-1**

8 Putt St, Parramatta, VIC 3000

88 ALBERT SHOPPING CENTRE : Detailed Scaffold Schedule

Site 211 South Street

Stage	INITIAL HIRE PERIOD				ADDITIONAL HIRE				TRANSPORT				LABOUR				Sales	Total	
	Hire/Week	PW % Disc	Min Days	Disc'd Day Rate	Day Rate	Day Rate % Disc	Disc'd Day Rate	Weight Tonnes	Deliver Cost	Return Cost	% Markup	Charge	Erect Cost	Dismantle Cost	% Markup	Erect			Down
S1 Perimeter Scaffold 1 A Bit Longer Than Usual	102,000.00	10	128	13,114.29	12,000.00	10	10,800.00	1,200.0	11,000.00	12,000.00	10	25,300.00	22,000.00	23,000.00	20	26,400.00	27,600.00	17,000.00	1,774,928.60
<b>Totals for Site</b>	102,000.00		13,114.29	12,000.00	10,800.00	1,200.0	11,000.00	12,000.00	25,300.00	22,000.00	23,000.00	26,400.00	27,600.00	17,000.00	1,774,928.60				

## Report Enhancements

Progress notes report enhanced to generate better format when exporting to excel.

Quote Summary report now includes the job discount and job number as well as showing gross hire value.

## Security

New security feature allows the iQuote administrator to set access rights to iQuote for all users.

## New Revisions/Auditing System

Every time a quote is added or edited and then saved, a complete copy of the quote including project, customer and stage details is saved as a "Revision".

A separate "Revisions" screen allows the user to scan through the revisions of a quote and the difference between the first revision and subsequent revisions is highlighted. Deleted stages are also highlighted. The date and time of each revision along with the user ID are displayed.

The Revision System allows for "Revision" quotes to be printed using the same layouts as for the "Live" quote. However, revision copies will be watermarked with the word "REVISION" along with the revision number.

Access to the Revisions System is security controlled and users, including the admin user, are not allowed to edit revision copies!



**PROJECT**

Type: COMMERCIAL  
 Name: "City Village" The Crestway  
 Site: Robina  
 City: brisbane

Contact: Marcella Pellicciotti  
 Email: Fred@amdindustries.com.au  
 Project Progress Notes: Date: 5/05/2014 Quote No:4708-1)(User:ADMIN SUPPORT) CF to follow up

**QUOTE**

Cust. Name: Large Works Group  
 Address 1: P.O. Box 123  
 City: NERANG  
 State: QLD  
 Postcode: 4211  
 Cust. Contact: LYNNE  
 Phone: 07-5551234  
 Email: lvnne@amdindustries.com.au

Quote Type: NEW QUOTE  
 Estimator: Brenda  
 Date Quoted: 21/10/2013  
 Plan Source: Builder Direct  
 Total Hire: 48958.34  
 Labour: 94824.00  
 Transport: 23040.00  
 Sales: 0.00  
 Total Value: 166822.34

Stage No.	Order No.	Areas	Stage Name	Stage Details*	Hire Per Week List	Hire Per Week % Discount	Minimum Days	Discounted
1		Area 1	Stage 1 Block 1 A Bit Longer Than Usual	To supply, erect and dismantle perimeter scaffo	1802.82	75.00	42	64.39
2		Area 2	Stage 1 Block 2		3000.00	75.00	50	107.14
3			Stage 1 Block 3 Much Longer Than Usual!!!		1858.64	75.00	42	66.38
4		Artea 4	Stage 1 Block 4		1854.62	75.00	50	66.24
5			Stage 1 Block 5		2000.64	50.00	75	142.90
6			Stage 1 Block 6		1854.62	75.00	42	66.24
7			Stage 1 Block 7		2430.65	75.00	42	86.81
8			Stage 2 Block 8		4553.11	75.00	42	162.61
9			Stage 2 Block 9		2517.77	75.00	42	89.92

## Jobs Board : 1.00 (Nov 2014)

Jobs Board add on allows logistics/job management for operations.

Day	Date	Job #	Action	Plans Qty	Load Made	Customer	Project	Site	Stage Name	Comments	Jacks / TWP	Labour Supplier	Labour Cost	Tonnage	Supervisor	Transport Supplier	Rep ID	Order No.	Areas	Stage No.	Stage Details	
Monday	22/09	6444-1	UP	YES	YES	CRAFT BUILD	47 Dudley Street	Paddington	SATURDAY	68-9-4	JUSTAZ	2358.00	24 Paul 0401 399 811	TEAM X2	GM					1	8 GUYS AARON/NO JUSTIN	
Monday	22/09	5416-1	DOWN	N/A	N/A	EVERMORE HC	Lot 7, 81 Bilsen R/Wavell Heig	Stage 2		58-45-2	GREG SIMMK	657.50	12672 Craig Wheatley	DAN	GM		00191/OH1		2			
Monday	22/09	4883-1	VO	N/A	N/A	Francis White	15 Lytton Road	Bulimba		2 MEN TO DEVO ON CHAR		SIMON UND	0.00	42070 DARREN HOODSON	N/A	RA						1 PULL SCAFF OUT FRONT TO
Monday	22/09	5028-1	P/DOWN	N/A	N/A	Francis White	19 Princess Stree	Bulimba		TOP DECK RH VO ON CHAR		WS SCAFFOL	0.00	52372 NATALIE CORDERI	N/A	RA						1 STRIP 1 DECK SIDES AND BA
Monday	22/09	5341-1	VO	N/A	N/A	Francis White	32 & 34 Gallway	Windsor		extra hand rail VO ON CHAR		KORI	0.00	70620 Joe Freney 0432 7	N/A	GM						1
Monday	22/09	6433-1	UP	YES	YES	G&G SNELLGR	41 Wentworth Pl	Balmoral			32-4-2	SIMON UND	725.00	6 Gary 0418 788 68	DAN	GM						1
Monday	22/09	4810-1	UP	YES	YES	Makin Reside	34 Mareeba Road	Ashgrove	STAGE 1	DEL: 0422 94186-6-3		DS SCAFFOL	2569.11	21 ALBERT INNAMOF	JOSH X2	GM						1 STAGE 1 FOR TRUCK
Monday	22/09	5091-1	UP	YES	YES	NU STYLE HOI	Lot 115 Cooper C	Rosedale			28-35-2	KORI	635.00	6 JASON ADAMS 04	DAN 2ND	RA						1 DELIVERIES ON DAY
Monday	22/09	5706-1	UP	YES	YES	SMK CONSTRI	17 Tabulam Stree	Wavell Heig	MAIN SCAFF		54-4-2	KWIKSCAFF	1242.00	15	POPPA X2	GM						1
Monday	22/09	6428-1	UP	YES	YES	SUTTON CON	133 Grosvenor St	Morningsid		JOSH 19-9; PR 64-6-3		PRECISION	1707.00	16 Luke 0422 995 74	JOSH	RA						1 CRANE TRUCK
Monday	22/09	5904-1	CONTINUE	N/A	N/A	TABRIZI PROP	Lot 86, 45 Hargre	Chelmer		PRC UP 1ST LC 44JKS		WS SCAFFOL	0.00	11288 KEVIN 0403 344 6	WALLIS CRA	BS						1 FINISH DOWN/PRICE GIVEN
Monday	22/09	5905-1	CONTINUE	N/A	N/A	TABRIZI PROP	Lot 87, 47 Hargre	Chelmer			44JKS	WS SCAFFOL	0.00	11270 KEVIN 0403 344 6	DAN	BS						1 FISH DOWN/PRICE GIVEN
Monday	22/09	5114-1	DOWN	N/A	N/A	URBAN SCEN	29 Tennyson Stre	Norman Pa	Stage 1		34-75-4	GLOBAL	623.50	11761 CHANTAL 0401 00	WALLIS CRA	RA						1 Mackliir OH1
Monday	22/09	4562-1	DOWN	N/A	N/A	VANTAGE HOI	Lot 1195, Waterw	The Gap	Unit Type 1a			JOHN PITA	0.00	20677 Jamie Glover 0407	JOSH	GM						1 UNITS 5-6
Tuesday	23/09	5475-1	CONT UP	N/A	YES	ZWS INVESTM	21-31 Gamelin C	Stafford		BRUCE X 1 FR ON GOING		CAGE	0.00	30 Rob 0421 991 999	BRUCE	GM						1
Tuesday	23/09	5475-1	CONT UP	N/A	N/A	ZWS INVESTM	21-31 Gamelin C	Stafford		BRETT DEL EX ON GOING		CAGE	0.00	00896 Rob 0421 991 999	RESI TRUCK	GM						1 FINISH BUILD/PRICE GIVEN

## iQuote : 5.030 (November, 2014)

### Improved Integration

iQuote can transfer the winning job to iRent.

Users have the option of accepting a winning job and it will be visible in iRent with full contract information.

### Report Enhancements

The user name is now shown in the Progress Notes Report.

### Main screen enhancement

Changed "Quote Mailed" to "Quote emailed" for progress notes.

### Quote search Enhancement

Added "Total Quote Value" range option to search TAB and included "Total Quote Value" in export to excel



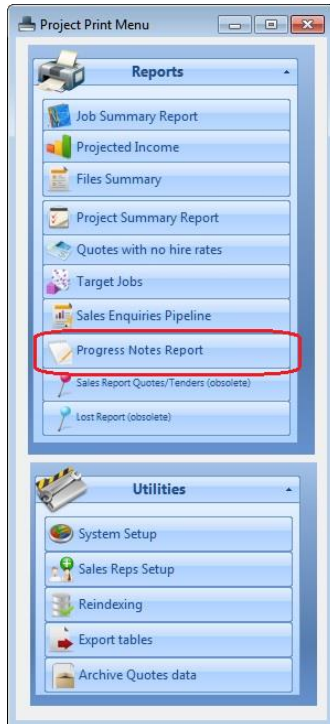
## iQuote : 4.800 (July, 2014)

### Searching

In the main Project screen, you may now order the Main List of Quotations by Client or Quotation Number.

### Improvements to Reports

We have added a new menu option to the reports menu: Progress Notes.



This report allows you to print a selection of Progress notes by Customer and Date Range. It's a great tool for managing your customer relationships.



Progress Notes Report

Job No.	Customer Name	Site Address	Progress Notes	Sales Rep
6074-1	2K CONSTRUCTIONS PTY LTD	LOT 19, FAIRWAY BOULEVARD HOPE ISLAND	Date: 30/07/2014 Quote No:6074-1)(User:BRENDA) Took \$100 off transport to reduce quote as per GS Next Call Date = 2/08/2014	SM
6075-1		LOT 3, FAIRWAY BOULEVARD HOPE ISLAND	Date: 22/07/2014 Quote No:6074-1)(User:BRENDA) Date: 30/07/2014 Quote No:6075-1)(User:BRENDA) Took \$100 off transport to reduce quote as per GS Next Call Date = 2/08/2014	
6076-1		LOT 96, FAIRWAY BOULEVARD HOPE ISLAND	Date: 22/07/2014 Quote No:6076-1)(User:BRENDA)	GM
5475-1	2WS INVESTMENTS	21-31 GAMELIN CRESCENT STAFFORD	Date: 22/07/2014 Quote No:6076-1)(User:BRENDA) Date: 12/05/2014 Quote No:5475-1)(User:SUZIE) Rob is going to send the signed Quote back to us in the next 2 days .as discussed with Rob Attention/ley book this Job in for 6 wks time - Sent Win verbal. Send email to Dispatch .sales. Last Call Date = 12/05/2014	
			Date: 5/05/2014 Quote No:5475-1)(User:BRENDA)	
			Date: 5/05/2014 Quote No:5475-1)(User:BRENDA) Re-quote R1 as per CF. Added 24 Jacks at \$50.	
			Date: 2/05/2014 Quote No:5475-1)(User:SUZIE) I Called Rob back to advise of the outcome (as per conversation with CF) Drafting did not read properly the Price will slightly change however this should not go over the 50 g. Rob wanted me to clarify with CF that scaffold not clip on is needed for 16 -17 - and Rob will be happy with this price and he should have this back on Monday . I have advised Craig and he will make sure this is done. Next Call Date = 5/05/2014 Last Call Date = 2/05/2014	
			Date: 2/05/2014 Quote No:5475-1)(User:CRAIG) Checking with drafting and confirm on Monday	
			Date: 28/04/2014 Quote No:5475-1)(User:SUZIE) Rob has advised he will send the signed quote back to us this week ,and this Job will start this is 4-6 wks . Rob advised. Plan does not show scaffold RE: Unit 16 -17 1st deck . advised Craig F. Next Call Date = 5/05/2014 Last Call Date = 28/04/2014	
			Date: 24/04/2014 Quote No:5475-1)(User:ESTIMATING) Craig requested this job. Received great feedback from Suzie's phone call to the builder. We were able to quote this job to meet the price that the builder was wanting. New quote sent to builder today.	

The Job Summary Report option can now order by customer.

The Project Summary Report option can now order by customer.

Both the Job Summary report and Progress Notes report can export to Excel based on the filter selected.



## iQuote : 4.500 (April, 2014)

### Changes to Quick Start Guide

Login:

Click on Reports/Utilities button "Admin"

Click on Sales Reps Setup to change sales rep information

Click on System Setup, click on reference page

For each subpage:

Stage In Quote: DO NOT CHANGE THIS!

Lost to: please update this

Result: DO NOT CHANGE THIS!

Draw Method: please update this

Estimator: please update this

Truck: please update this

Labour Crew: please update this

On the System Setup General page, you may change most of the settings based on your business requirements but DO NOT change any of the paths!

## iQuote : 4.200 (March, 2014)

### Report Enhancements

#### Job Files

The Job Files report can now filter by Customer Name.

#### Job Summary

Added filter by customer range.

Added export to excel option.



## **iQuote : 4.100 (February, 2014)**

### **Improved Layout Versatility**

You may now use as many as four different quotation layouts in your single installed iQuote system.

### **More Templates**

We've increased the number of available templates from which you can choose from to a total of ten (10).

### **Live Signature Storage**

Our database now allows you to store the actual Salesperson signature, for PDF quotation printing.

## iQuote : 4.000 (January, 2014)

### Interface Enhancement

We have made the following improvements to the interface:

- **document filing index.** general enhancement
- **main Quotation List grid.** double-clicking on a record here will now take you to the main screen record

### Main Stages Grid Correction

We have fixed the issue involving two columns swapped in the Main Stages grid

### Improved Clipboard Functionality

We've made improvements to the way Cut and Paste commands operate in the Main Quotations form.

### Initial View Change

The system now automatically opens jobs in Folder view.