

Scaffolding Software

iQuote v6.48

New Features

November 2022



Copyright © Scaffolding Software 2010-2023



iQuote : 6.48 (November, 2022)

Quote letter enhancements.

Added ability to allow multiple detail sections in the quote letter. See sample below:

The scaffold specifications are as follows:

Scope of Works:

Stage 1 Description: Stage 1

Erect scaffold o perimeter of house 2 deck levels where required

Stage 2 Description: Stage 2

2 levels of boards 3 wide
2 levels of hop up brackets
2 levels of kickboards

Stage 1 Description: Stage 1

TOTAL SCAFFOLDING COSTS FOR THE FIRST	1	<u>WEEKS</u>	\$	5,037.50
HIRE OF SCAFFOLDING PER DAY AFTER			\$	950.00

MINIMUM HIRE PERIOD IS AS QUOTED. THIS QUOTATION EXCLUDES ANY GST

Stage 2 Description: Stage 2

TOTAL SCAFFOLDING COSTS FOR THE FIRST	4	<u>WEEKS</u>	\$	5,825.00
HIRE OF SCAFFOLDING PER DAY AFTER			\$	972.00

MINIMUM HIRE PERIOD IS AS QUOTED. THIS QUOTATION EXCLUDES ANY GST

Added ability to include customised Terms and Conditions text to your quote letter.

iQuote : 6.46 (April, 2020)

Enhancements.

Added an extra "Details type 3" TAB in setup form. This TAB contains pages for the following text templates:

- Scaffold description.
- Scope of works.
- Clarifications.
- General exclusions.
- Standard conditions of hire.

iRent users form now has a delete user option.

Added option for a "Terms and conditions" file to be printed along with the quote.

Bug fixes:

Fixed issue with Quote details page when adding the second or subsequent stage: the initial hire period section is now visible.

Changed the misleading message that pops up when logging in without selecting a branch first.

iQuote : 6.40 (March, 2019)

Enhancements.

For “Roofing” option:

Added “General Conditions” section to Roofing quote.

Added a new TAB in the setup form – “Per Metre Tiers”. This required new forms to maintain Stage Names, Stage Tiers and Tier Levels.

Added option to colour code roofing products.

Bug fixes:

Fixed issue with Job Summary report when report type was not set.

Fixed issue with Job Summary report with Customer’s drop down list.

iQuote : 6.27 (September, 2018)

Enhancements.

Added option to handle quoting for roofing instead of scaffolding. This includes changing the main and quote details pages to be formatted and assigned to roofing specific options.

Updated reports to handle roofing.

Bug fixes.

- Fixed issue when using "Find" in the main form: the quote details page was not refreshed.
- Fixed issue when using the "Search" TAB in the main form: the quote details page was not refreshed.
- Fixed issue with the Builder Not Quoted report where part of the report went off page on the right hand side.
- Fixed issue when deleting a stage
- Fixed issue with Min Days and Transport Cost popups.
- Fixed issue with stage order numbers being all set to the same number when accepting a quote.

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.

ID	Description
R	RESIDENTIAL
C	COMMERCIAL
I	MEDIUM DENSITY

Buttons: Add, Delete, Exit

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

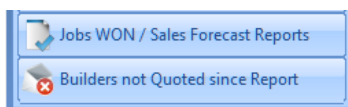
Added new report "Builders that have not quoted since..."

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:

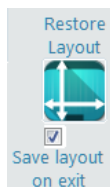
In the Quote details TAB, the grid columns may be adjusted and resized similar to the behaviour in Excel.

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"/>	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.



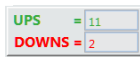
JobsBoard : 1.27 (January, 2018)

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).



DAILY JOBS Version number: 1.27

Refresh Every: 300 Seconds

Refresh Now

Daily Jobs Date: Monday 05/02/2018

Job is Done ☒

Restore Layout ☒ Save layout on exit

Crew	Numbers	Job No.	Job Type	Customer	Site	JACKS/TWP/DECKS	Job Order	7AM Checkin	1PM Checkin	Rollover	Comments
ABC SCAFFOLDING	0	14135-1	UP	CONSTRUCTIONS AUS	Southport						
ABC SCAFFOLDING	0	14577-1	VO	NEW HOMES	Coorparoo	ON CHARGE					
BETTER SCAFFOLDING	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	Rosedale	50-5.5-3					
BILLS LABOUR	0	11187-2	UP	XYZ HOMES	Tarragindi	76-8.5-4					
BUILD SCAFFOLDING	0	14997-1	DOWN	NEWBUILD	Upper Kedron	14-4.0-2					
LABOUR SUPPLIER	0	14384-1	UP	QUALITY HOMES	Palmview	62-4.0-2					
LABOUR SUPPLIER	0	11904-3	VO	XYZ HOMES	Bridgeman Downs	ON CHARGE					
NEW SCAFFOLDING	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 SCAFFOLDING	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.

Exit

Add Project

Add Quote

Find

Save

Edit

Print Quote

Print Project

Print Selected

Revisions

Folders

Order By

☒ Job No.
☐ Customer

Project \ Quotes

Quote Details

List

Search

RS 1008 - 2

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 the setup screen. Sample plan sources are: Builder Direct, Client Services and Rep.

Project Summary Report

Enter Date Range

Select Date Type

☒ Project Open Date

☐ Quote Result Date

From 23/01/2015

To 23/01/2015

Report Type

☐ Jobs Quoted

☐ Jobs Won

☐ Jobs Lost

☐ Jobs Pending

☐ Jobs with Zero Total Value

☒ Plan Report

Project Type

Sales Rep

☐ Order by customer

☐ Order by Job No.

☒ Order by Rep

☐ Show FIRST tender/quote only

☐ Show description

Print Preview Cancel

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
1006	- 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

INITIAL HIRE PERIOD					ADDITIONAL HIRE				TRANSPORT				LABOUR						
Stage	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	Sales	Total
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
Totals for Site	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!

Exit Add Project Add Quote Find Save Edit Print Quote Print Project

Order By Job No. Customer

Project \ Quotes Quote Details List Search

RS 4708 - 1

Project Type COMMERCIAL Cordell

Project Name "City Village" The Crestway

Branch BRISBANE

Revisions

Exit RS 4708 - 1 Revision 0006 of 8 Date/Time 15/01/2015 10:45:58 AM User ID R Print Quote Print Project Branch BRISBANE

PROJECT

Type COMMERCIAL Cordell

Name "City Village" The Crestway

Site Robina

City brisbane

Contact Marcella Pellicciotti Phone Open Date 03/10/2013 Target Project ☒

Mobile Fax Result LOST

eMail Fred@amdindustries.com.au Result Date 16/12/2013

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

Address 2

City NERANG State QLD Postcode 4211

Cust. Contact LYNNE Phone 07-5551234

Mobile Fax

eMail lvnne@amdindustries.com.au

Quote Progress Notes Date: 5/05/2014 Quote No:4708-1)(User:ADMIN SUPPORT) CF to follow up

Quote Type NEW QUOTE Date Required / / Estimator Brenda Date Quoted 21/10/2013

Pricing Method Expected Start Date No. Weeks 0 Chance To Win 0% Finish Date / /

Plan Source Builder Direct Rep Richard Larkins

Total Hire 48958.34 Discount % 71.9

Labour 94824.00 Weeks 10.7

Transport 23040.00 Total Weight 328583.3 (kg)

Sales 0.00 Last Call Date 04/11/2013

Total Value 166822.34 Call Back Date / /

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 scaff	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.

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

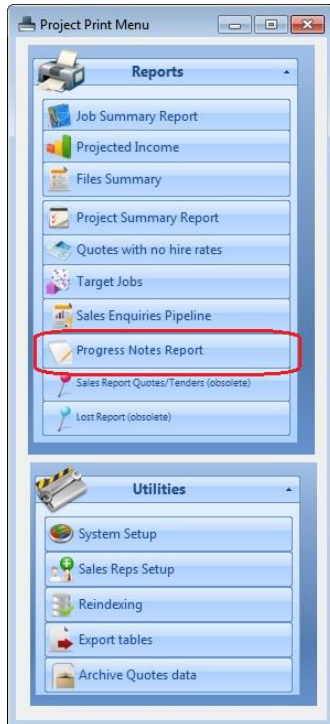
iQuote : 4.800 (July, 2014)

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.



PPM Logistics

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:6075-1)(User:BRENDA) Date: 22/07/2014 Quote No:6076-1)(User:BRENDA)	
5475-1	2WS INVESTMENTS	21-31 GAMELIN CRESCENT STAFFORD	Date: 12/08/2014 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/lay book this Job in for 6 wks time - Sent Win verbal .Send email to Despatch .sales. Last Call Date = 12/05/2014	GM
			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 requote 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.