

## EstimatorPro Key Features:

- Estimate List
- Add new estimate
  - Estimate information
    - Enter name
    - Select due date
    - Enter tax percentage
    - Enter mark-up percentage
    - Enter discount percentage
  - Customer information
    - Enter name
    - Enter address 1
    - Enter address 2
    - Enter city
    - Enter state
    - Enter zip code
  - Customer contact
    - Enter name
    - Enter email address
    - Enter phone number
  - Set-up
    - Select new categories
      - Add new categories
        - Enter category name
      - Edit categories
    - Edit categories
      - Delete categories
      - Move categories
    - Update categories
      - This function will copy all categories in your current take-off list. This can be helpful when copying take-off items from one estimate to another
    - Select customer proposal
      - See Create PDF document
    - Export CSV file
      - See CSV files
- Edit estimates
  - Edit estimate information
  - Edit customer information
  - Edit customer contact
  - Set-up
    - Add new categories
    - Select customer proposal
      - See Create PDF document
    - Export CSV file
- Edit estimate list
  - Delete estimates
  - Move estimates
- Search estimates by estimate or customer name
- Add new take-off items
  - Select category
  - Enter description
  - Enter quantity
  - Enter cost
  - Display subtotal
  - Enter notes
  - Select taxable

- Edit take-off items
- “Labor” category
  - When a “Labor” category is set-up the following changes occur:
    - Enter quantity changes to labor hours
    - Enter cost changes to labor rate
    - Labor hours and rate are displayed on detailed estimate PDF
    - Taxable defaults to “off”
- Take-off item displays whether it contains notes or taxes
- Search take-off items by description or notes
- Import CSV file
  - See CSV files
- Create PDF document
  - Two types of documents: Proposal and Estimate
    - Proposal is the default document. Tax and mark-up is included in respective categories
    - Estimate
      - Details:
        - Total cost
        - Tax
        - Mark-up
        - Labor hours
        - Crew rate
  - Select logo
  - Preview PDF document
  - Email PDF document
- Find and replace by take-off item category, description and note
- Sort by category
- Edit take-off list
  - Remove all
  - Delete by selected take-off items
- CSV files
  - Easily create CSV files
  - Export current take-off list to CSV file format for editing in Numbers app
  - Import CSV files after editing (guidelines are outlined in owners manual)
- Drag and drop to move take-off items within the take-off list
- Drag and drop selected take-off items to copy to any estimate
- Drag and drop one estimate to another to copy all take-off items of a single estimate
- Drag and drop take-off items to Reminders app. The item description is copied during this action
- Drag and drop reminders from Reminders app. A new take-off item is created and the item description is copied from the reminder
- Automatically saves when app is closed
- Select estimate to refresh view