

Estimator Pro

INDEX

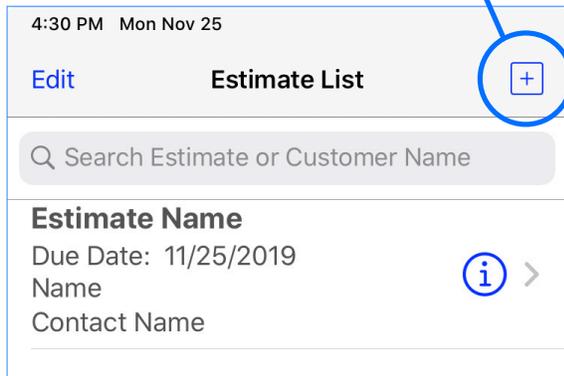
- **Add a New Estimate**
- **Edit a Estimate**
- **Add a New Category**
- **Edit a Category**
- **Add a Take-Off Item**
- **Edit a Take-Off Item**
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FEATURES

Visit www.jcptechnologiesLLC.com and select the “Key Features” tab

ADDING A NEW ESTIMATE

Press the “+” button to begin a new estimate



4:30 PM Mon Nov 25

Edit Estimate List +

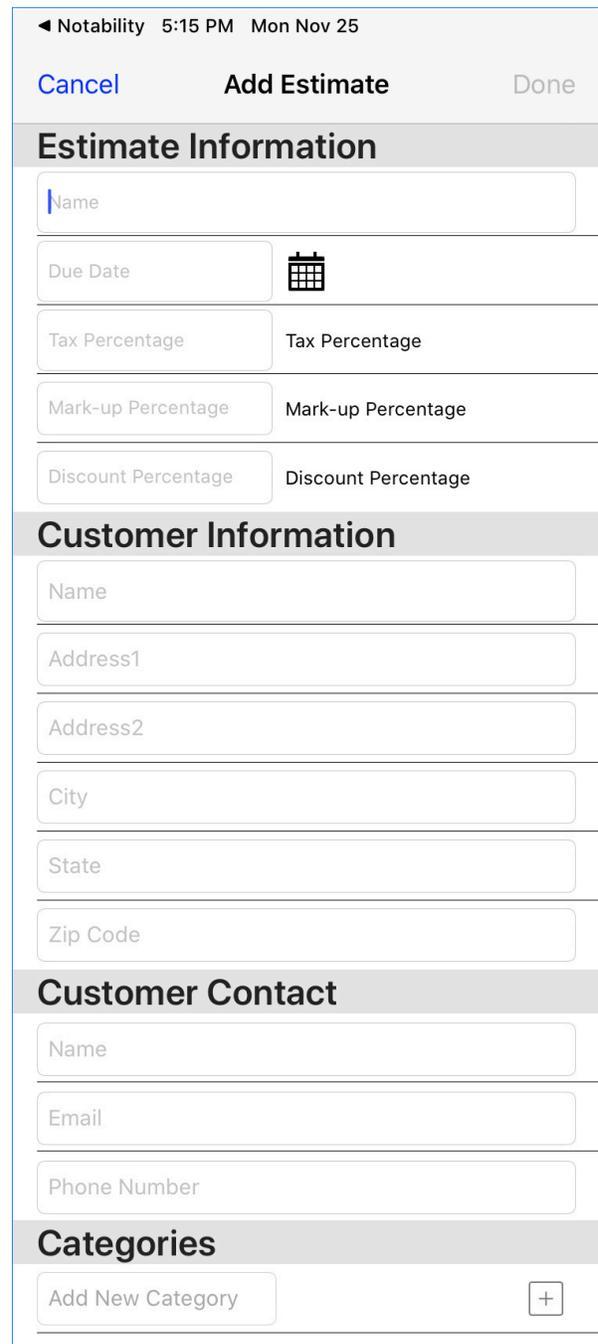
🔍 Search Estimate or Customer Name

Estimate Name
Due Date: 11/25/2019 i >
Name
Contact Name

The “Add Estimate” screen will open and allow you to enter Estimate, Customer and Contact information.

Categories can be added once the Estimate Name field is completed and “Done” is pressed to save the estimate. Simply re-open the estimate to start adding new categories.

Please note that you must complete the Estimate Name field before you can save the estimate.



◀ Notability 5:15 PM Mon Nov 25

Cancel Add Estimate Done

Estimate Information

Name

Due Date 

Tax Percentage Tax Percentage

Mark-up Percentage Mark-up Percentage

Discount Percentage Discount Percentage

Customer Information

Name

Address1

Address2

City

State

Zip Code

Customer Contact

Name

Email

Phone Number

Categories

Add New Category +

EDITING A ESTIMATE

4:30 PM Mon Nov 25

Edit Estimate List +

Q Search Estimate or Customer Name

Estimate Name
Due Date: 11/25/2019
Name
Contact Name



Press the “i” button to edit an estimate

The “Edit Estimate” screen will open and allow you to edit your Estimate, Customer and Contact information.

7:20 PM Tue Dec 10

Cancel Edit Estimate Done

Estimate Information

Estimate Name

12/09/2019 

0.0 Tax Percentage

0.0 Mark-up Percentage

0.0 Discount Percentage

Customer Information

Name

Address

Address 2

City

State

Zip Code

Customer Contact

Contact Name

Email

Phone Number

Set-Up

Add New Category +

Customer Proposal

ADDING A NEW CATEGORY

4:36 PM Tue Nov 26

Cancel Edit Estimate List Done

Estimate Information

Estimate Name

11/25/2019

0.0 Tax Percentage

0.0 Mark-up Percentage

0.0 Discount Percentage

Customer Information

Name

Address

Address 2

City

State

Zip Code

Customer Contact

Contact Name

Email

Phone Number

Categories

Add New Category

Press the “+” button to begin category set-up

The application automatically creates two default categories. You can either delete them or edit them to change the category name. Editing categories is covered on the following page.

Press the “+” button to begin adding new categories.

1:42 PM Wed Nov 27

< Edit Estimate List Edit

Category 1 >

Category 2 >

The “Add Category” screen below will open and allow you to enter a category name.

Categories can be added once the Category Name field is completed and “Done” is pressed to save the category.

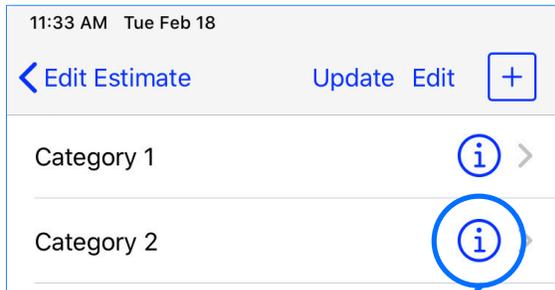
Please note that you must complete the Category Name field before you can save the estimate.

7:03 PM Sun Dec 8

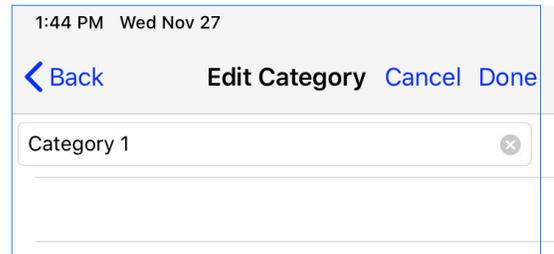
< Back Add Category Cancel Done

Category Name

EDITING A NEW CATEGORY



Press the “i” button to edit an category



The “Edit Category” screen will open and allow you to edit your Category Name.

ADD NEW TAKE-OFF ITEM

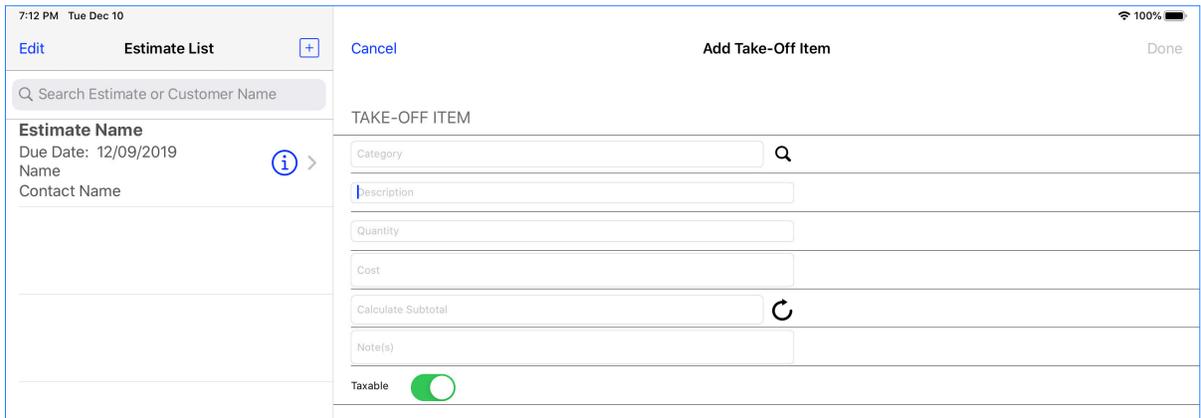


7:07 PM Tue Dec 10

Edit Estimate List + Edit Remove All [trash] [refresh] [search] [print] [share] [plus]

Q Search Estimate or Customer Name Q Search Description or Notes

Press the “+” button to begin adding a new take-off item



7:12 PM Tue Dec 10

Edit Estimate List + Cancel Add Take-Off Item Done

Q Search Estimate or Customer Name

Estimate Name
Due Date: 12/09/2019
Name
Contact Name

TAKE-OFF ITEM

Category [search]

Description

Quantity

Cost

Calculate Subtotal [refresh]

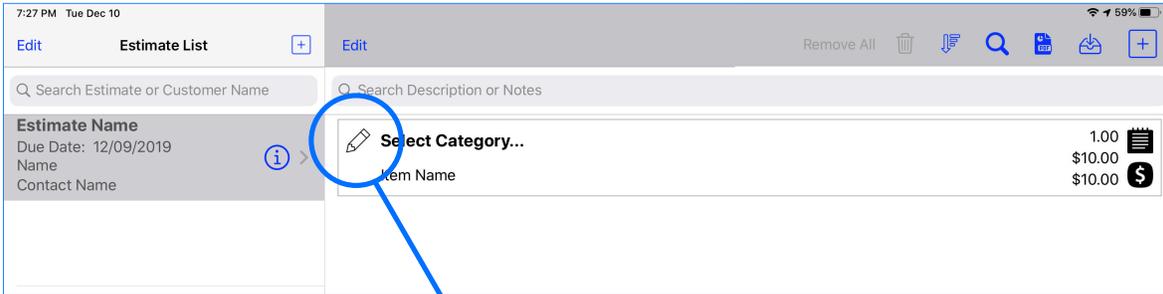
Note(s)

Taxable

The “Add Take-Off Item” screen will allow you to perform the following:

- **Select a category.** If “Labor” is your default category the quantity and cost field change to Labor Hours and Labor Rate
- **Enter description**
- **Enter quantity**
- **Enter cost**
- **Calculate your subtotal.** Press the refresh button to update this field as you make changes to quantity or cost
- **Enter notes**
- **Select whether the item is taxable.** If “Labor” is your selected category taxable is automatically turned off

EDIT TAKE-OFF ITEM

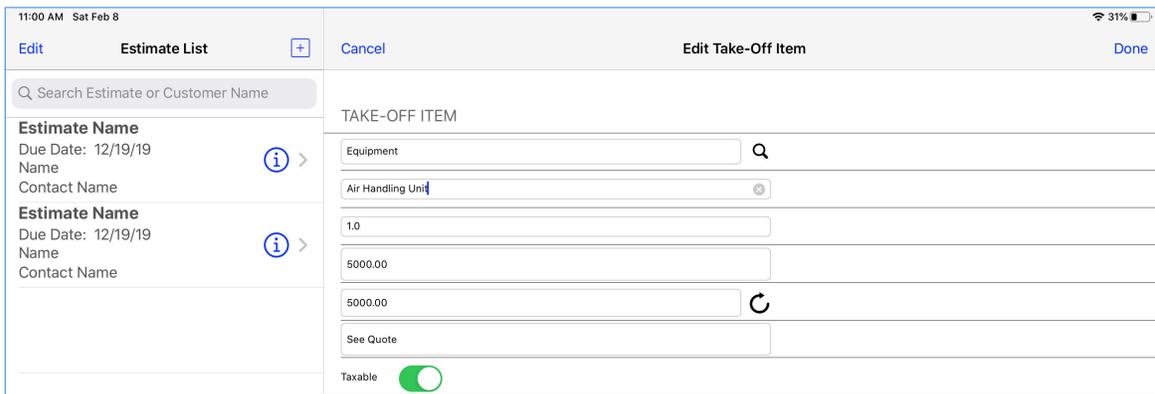


Press the "pencil" button to edit a take-off item

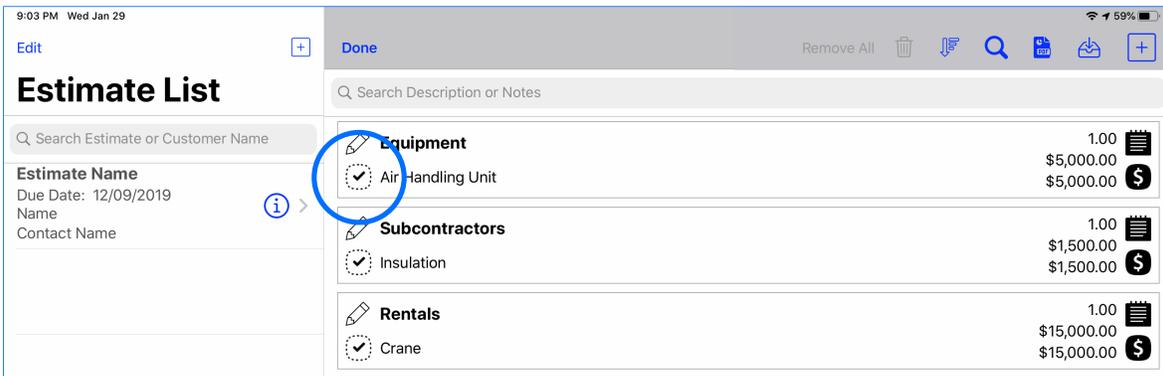
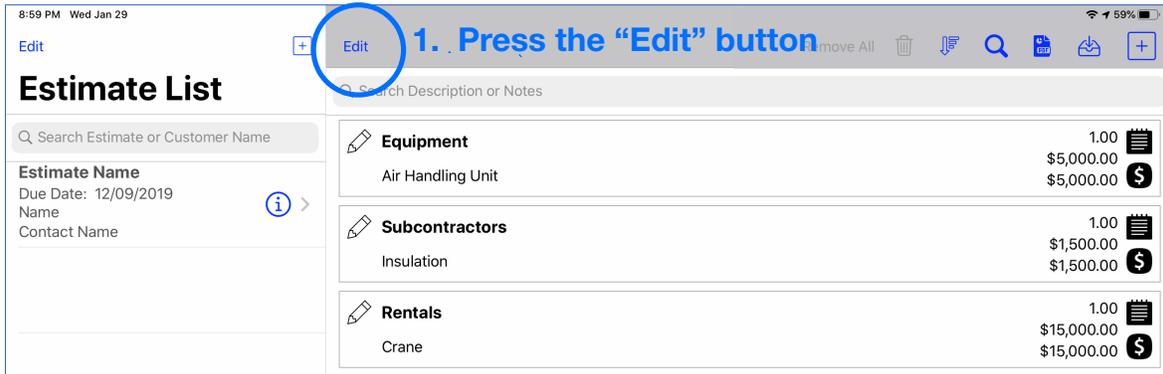


Indicates that the take-off item contains notes

Indicates that the take-off item is taxable

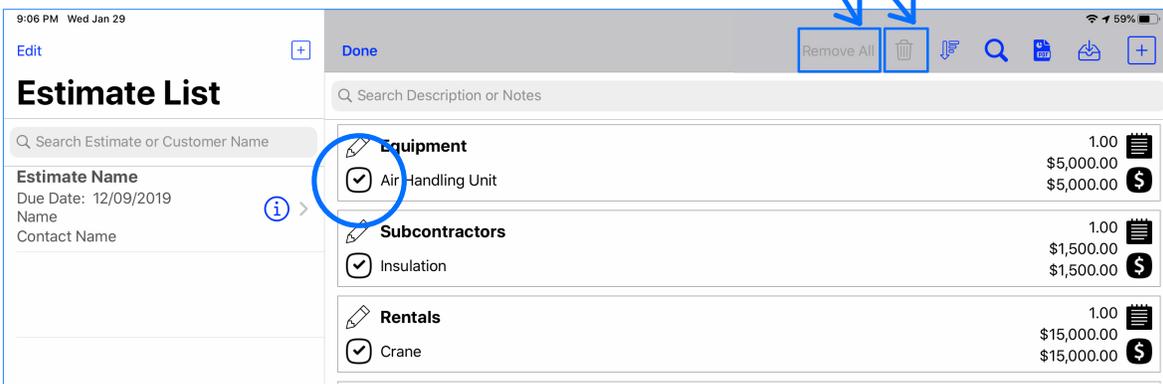


EDIT TAKE-OFF LIST



Once selected the following actions can be performed:

- Drag and drop (See drag and drop)
- Remove all
- Delete selected
- *(Note the remove all and delete action can not be undone)*



DRAG AND DROP

8:43 PM Mon Feb 17

Edit

Estimate List

Q Search Estimate or Customer Name

Estimate Name
Due Date: 2/9/20
Name
Contact Name

Category	Description	Quantity	Unit Price	Total Price
Equipment	Air Handling Unit	1.00	\$5,000.00	\$5,000.00
Rentals	Crane	1.00	\$15,000.00	\$15,000.00
Subcontractors	Insulation	1.00	\$1,500.00	\$1,500.00

Drag and drop to reorder take-off items

7:45 PM Mon Feb 3

Edit

Estimate List

Q Search Estimate or Customer Name

Estimate Name
Due Date: 12/19/19
Name
Contact Name

Category	Description	Quantity	Unit Price	Total Price
Equipment	Air Handling Unit	1.00	\$5,000.00	\$5,000.00
Subcontractors	Insulation	1.00	\$1,500.00	\$1,500.00
Rentals	Crane	1.00	\$15,000.00	\$15,000.00

Drag and drop multiple selected items at a time

6:40 PM Wed Feb 5

Edit Estimate List

Done

Q Search Estimate or Customer Name

Q Search Description or Notes

Estimate Name
Due Date: 12/19/19
Name
Contact Name

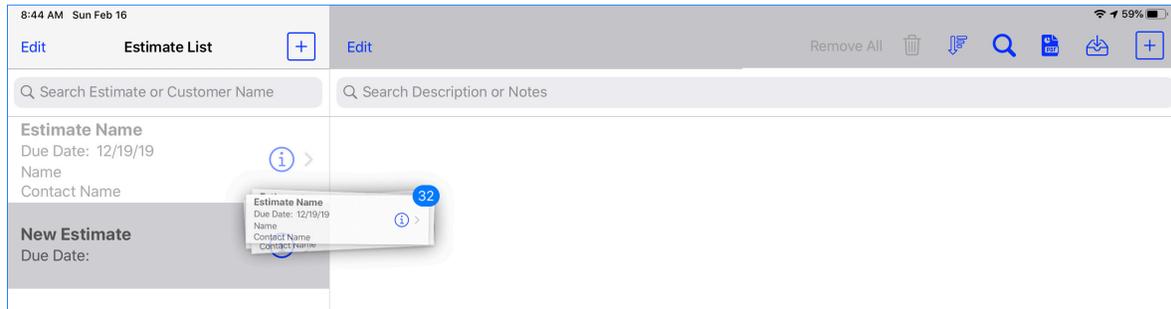
Estimate Name
Due Date: 12/19/19
Name
Contact Name

Category	Description	Quantity	Unit Price	Total Price
Equipment	Air Handling Unit	1.00	\$5,000.00	\$5,000.00
Subcontractors	Insulation	1.00	\$1,500.00	\$1,500.00
Rentals	Crane	1.00	\$15,000.00	\$15,000.00

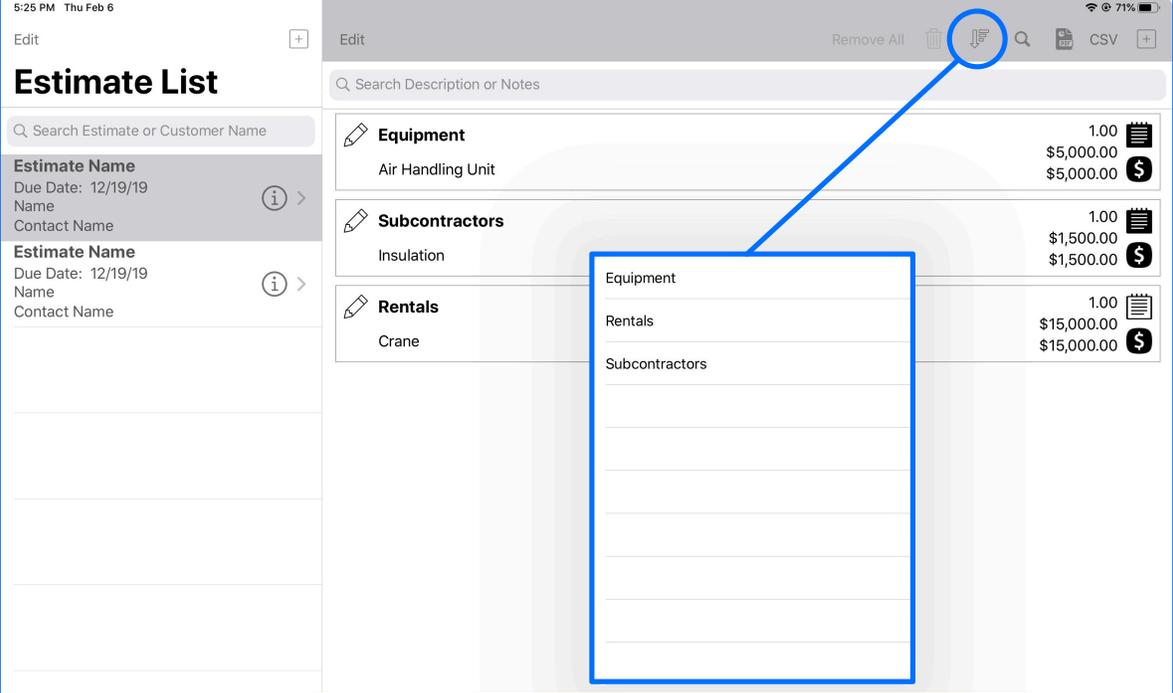
- Drag and drop to copy take-off items from one estimate to another
- Drag and drop take-off items within the same estimate to easily copy a take-off item

DRAG AND DROP - Continued

Easily copy the contents of one estimate to another by dragging from the source to the new estimate



SEARCH AND SORTING



- Sort by category



- Search estimates by estimate or customer name
- Search take-off items by description or notes

PDF Documents

6:23 PM Wed Feb 19

Cancel Edit Estimate Done

Estimate Information

Estimate Name [x]

2/9/20 [calendar icon]

0.0 Tax Percentage

10 Mark-up Percentage

0.0 Discount Percentage

Customer Information

Name [input]

Address [input]

Address 2 [input]

City [input]

State [input]

Zip Code [input]

Customer Contact

Contact Name [input]

Email [input]

Phone Number [input]

Set-Up

Add New Category [input]

Customer Proposal

Export CSV File [input]

[back] [forward] [share]

Proposal

February 07, 2020



Name
Address
Address 2
City State Zip Code

Estimate Name

Summary -

Equipment	\$5,000.00
Subcontractors	\$1,500.00
Rentals	\$15,000.00
Discount	\$0.00
Grand Total	\$43,000.00

Categories appear in the order they are listed. Visit categories and reorder as needed

Customer proposal does not include the following:

- Total cost
- Tax
- Mark-up
- Labor hours
- Crew rate

Summary -

Rentals	\$30,000.00
Subcontractors	\$3,000.00
Equipment	\$10,000.00
Total Cost	\$43,000.00
Tax	\$0.00
Mark-up	\$0.00
Discount	\$0.00
Grand Total	\$43,000.00
Labor Hours	0
Crew Rate	\$0.00

Thank you!

Estimate Summary

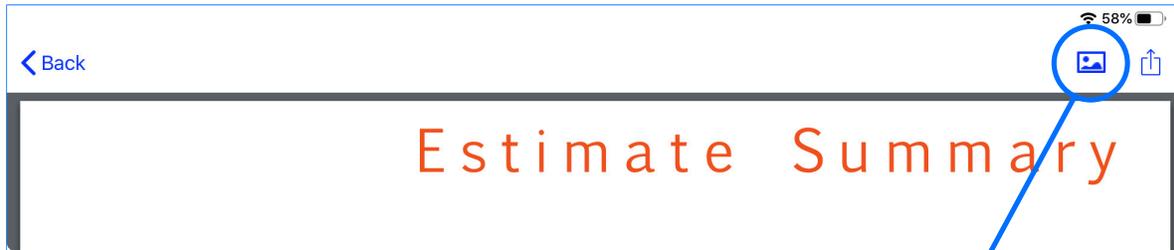
Estimate Notes

Air Handling Unit
Insulation
Crane
Air Handling Unit

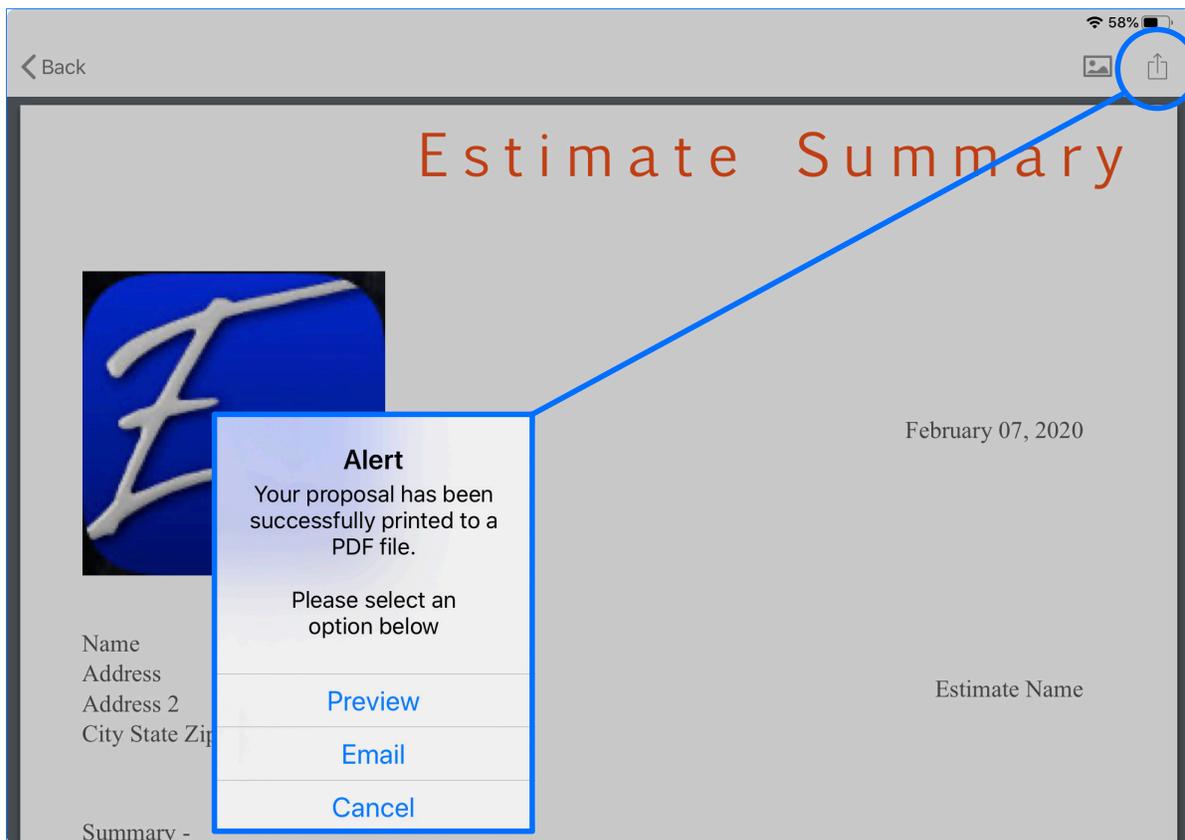
Estimate Summary includes the following:

- Total cost
- Tax
- Mark-up
- Labor hours
- Crew rate

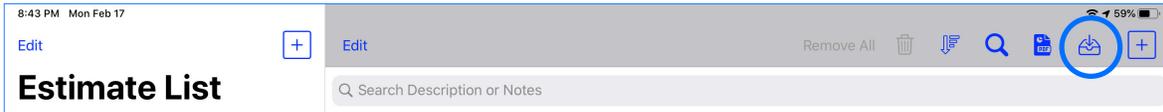
PDF Documents Continued



Select the logo you would like to appear on your document



Import CSV File



Use Numbers App to create CSV file. Import CSV file into take-off list. You will need to follow a few simple rules.

	A	B	C	D	E	F
	CSVEstimate					
1	Category	Name	Qty	Cost	Subtotal	Note
2	Labor	Install Equipment	32	55	1760	Enter Notes Here
3	Material	Buy Material	1	100	100	See Quote
4	Equipment	Buy Equipment	1	5000	5000	See Quote
5	Subcontractors	Insulation	8	150	1200	Issue Subcontract
6	Rentals	Crane	1	4000	4000	Get Quotes
7	Other	Bolts	1	500	500	See Quote

Rules:

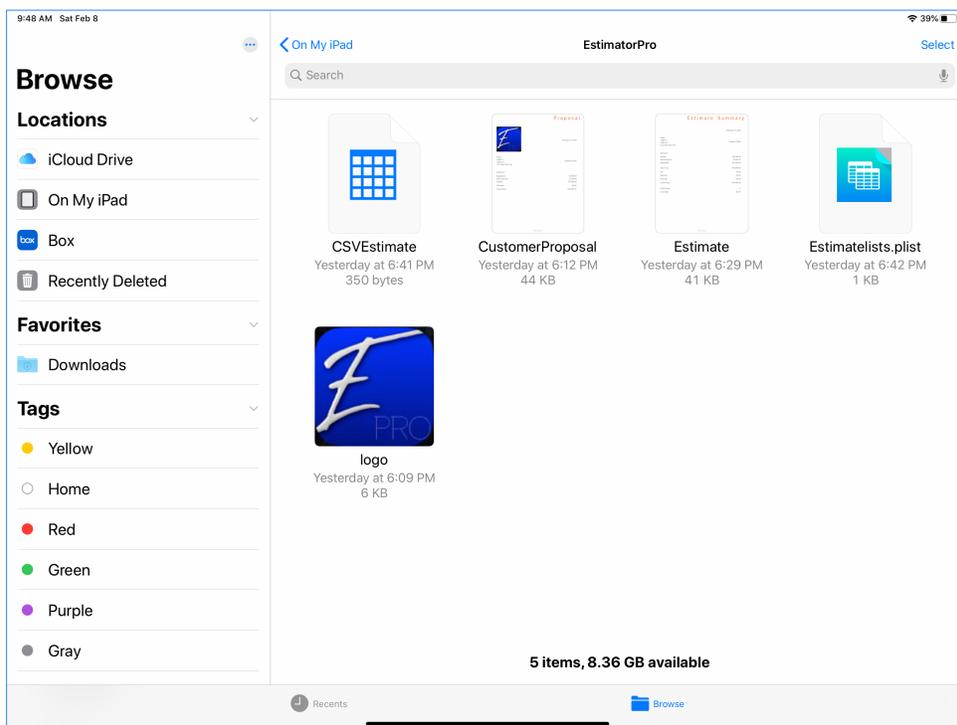
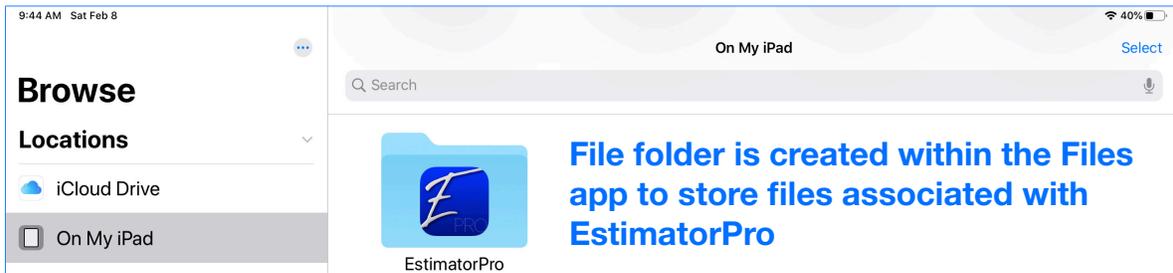
- **Column headers must match example**
- **File name must be "CSVEstimate"**
- **Do not leave cells blank**

- **CSV files can be opened in Numbers or Excel for editing**

Export CSV File

Export take-off list to comma separated values

File Storage



- List of files created by EstimatorPro

