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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 Mor	n Nov 25	
Edit	Estimate List	(+
Q Search	Estimate or Customer	r Name
Estimate	• Name	
Name	11/20/2010	

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 Ad	d Estimate	Done
Estimate Info	rmation	
Name		
Due Date		
Tax Percentage	Tax Percentage	
Mark-up Percentage	Mark-up Percentage	
Discount Percentage	Discount Percentage	
Customer Info	ormation	
Name		
Address1		
Address2		
City		
State		
Zip Code		
Customer Co	ntact	
Name		
Email		
Phone Number		
Categories		

+

Add New Category

EDITING A ESTIMATE

4:30 PM Mon		
4.00 P M MOI	Nov 25	
Edit	Estimate List	+
Q Search E	Estimate or Customer Nar	ne
Estimate Due Date: Name Contact Na	Name 11/25/2019 ame	
Press the edit an es The "Edit open and	e "i" button to / stimate t Estimate" screen I allow you to edit y	will your

7:20 PM Tue De	ec 10	
Cancel	Edit Estimate	Done
Estimate	Information	
Estimate Name		⊗
12/09/2019	İ	
0.0	Tax Percentage	
0.0	Mark-up Percentage	3
0.0	Discount Percentage	e
Custome	r Information	
Name		
Address		
Address 2		
City		
State		
Zip Code		
Custome	r Contact	
Contact Name	2	
Email		
Phone Numbe	 Pr	
Set-Up		
Add New Categ	gory	+
Customer Prop	osal	

ADDING A NEW CATEGORY

4:36 PM Tue Nov 26					
Cancel Edit E	stimate List Done				
Estimate Infor	mation				
Estimate Name	8				
11/25/2019					
0.0	Tax Percentage				
0.0	Mark-up Percentage				
0.0	Discount Percentage				
Customer Info	rmation				
Name					
Address					
Address 2					
City					
State					
Zip Code					
Customer Con	ntact				
Contact Name					
Email					
Phone Number					
Categories	\frown				
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 pate.

Press the "+" button to begin adding new categories.

1:42 PM Wed Nov 27	
Edit Estimate List	Edit +
Category 1	(i) >
Category 2	(i) >

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.



EDITING A NEW CATEGORY

11:33 AM Tue Feb 18	
Edit Estimate	Update Edit +
Category 1	(i) >
Category 2	í
Press the "i" butto edit an category	on to

1:44 PM Wed	Nov 27	
〈 Back	Edit Category Ca	ncel Done
Category 1		8
The "Edit	Category" scree	n will

I ne "Edit Category" screen will open and allow you to edit your Category Name.

ADD NEW TAKE-OFF ITEM

7:07 PM Tue Dec 10		_			≈ 1	5%
Edit Estimate List +	Edit		1e	Q	Ċ	+
Q Search Estimate or Customer Name	Q Search Description or Notes					\succ

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

7:12 PM Tue Dec 10			중 100% 🔳
Edit Estimate List +	Cancel	Add Take-Off Item	Done
Q Search Estimate or Customer Name			
Estimate Name	TAKE-OFF ITEM		
Due Date: 12/09/2019	Category	Q	
Contact Name	pescription		
	Quantity		
	Cost		
	Calculate Subtotal	Ċ	
	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 wether 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



item is taxable

11:00 AM Sat Feb	8				🗢 31% 💽 -
Edit	Estimate List	+	Cancel	Edit Take-Off Item	Done
Q Search Estimate or Customer Name					
Estimate Na	me		TAKE-OFF ITEM		
Due Date: 12, Name	^{(19/19}) >	Equipment	Q	
Contact Name	e		Air Handling Unit		
Estimate Na Due Date: 12,	me /19/19		1.0		
Name Contact Name	•	, <i>,</i> ,	5000.00		
			5000.00	Ċ	
			See Quote		
			Taxable		

EDIT TAKE-OFF LIST

8:59 PM Wed Jan 29 Edit +	Edit	1. Press the "Edit" buttonmove All 🝵 🔋	n Q	 ₹ 1 59% ■
Estimate List	Q Seal	ch Description or Notes		
Q Search Estimate or Customer Name	6	Equipment		1.00
Estimate Name	,	Air Handling Unit		\$5,000.00
Name	ب ال	Subcontractors Insulation		1.00 \$1,500.00 \$1,500.00
		Rentals Crane		1.00 \$15,000.00 \$15,000.00 \$

9:03 PM Wed Jan 29		₹ 1 59% ■)
Edit +	Done	Remove All 🔟 🎼 🔍 📾 😤 [+]
Estimate List	Q Search Description or Notes	
Q Search Estimate or Customer Name	C Equipment	1.00
Estimate Name Due Date: 12/09/2019	Air Handling Unit	\$5,000.00 \$
Name Contact Name	Subcontractors	1.00
	Insulation	\$1,500.00 \$
	Rentals	1.00
	Crane	\$15,000.00

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)

9:06 PM Wed Jan 29				२ 1 59%	% n
Edit +	Done	Remove All	Q	🛗 🖒 (+
Estimate List	Q Search Description or Notes				
Q Search Estimate or Customer Name	C Equipment			1.00	Ë
Estimate Name Due Date: 12/09/2019	Air Handling Unit			\$5,000.00 \$5,000.00	\$
Name (1) > Contact Name	Subcontractors			1.00	Ë
	Insulation			\$1,500.00 \$1,500.00	\$
	🖉 Rentals			1.00	Ë
	Crane			\$15,000.00 \$15,000.00	\$

DRAG AND DROP



Drag and drop multiple selected items at a time

6:40 PM Wed Feb 5		🗢 1 59% 🔳
Edit Estimate List +	Done	Remove All 🔟 🎼 📿 🔚 👍 🕂
Q Search Estimate or Customer Name	Q Search Description or Notes	
Estimate Name Due Date: 12/19/19 Name Contact Name	Equipment Image: Air Handling Unit	1.00 \$5,000.00 \$5,000.00
Estimate Name Due Date: 12/19/19 Name Contact Name	Subcontractors Insulation	1.00 \$1,500.00 \$1,500.00
	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

8:44 AM Sun Feb 16					२ 1 59% ■
Edit Estimate List	+	Edit		JF Q	⇔ +
Q Search Estimate or Customer	Name	Q Search Description or Notes			
Estimate Name Due Date: 12/19/19 Name Contact Name	(i) >				
New Estimate Due Date:	Estimate Name Due Date: 12/19/19 Name Contact Name Contact Name	32 (€) >			

SEARCH AND SORTING

5:25 PM Thu Feb 6		€ @ 71%
Edit +	Edit Remove A	『 前 『 Csv 于
Estimate List	Q Search Description or Notes	
Q Search Estimate or Customer Name	🖉 Equipment	1.00
Estimate Name Due Date: 12/19/19	Air Handling Unit	\$5,000.00
Contact Name	Subcontractors	1.00
Estimate Name Due Date: 12/19/19	Insulation Equipment	\$1,500.00 (\$
Contact Name	Rentals Rentals	1.00 🗐 \$15,000.00
	Crane Subcontractors	\$15,000.00
		_
		_

Sort by category

4:05 PM Thu Nov 28	२ 1 59% ■	D,
Edit Estimate List +	Edit Remove All 🗍 🎼 📿 😫 🕂]
Q Search Estimate or Customer Name	Q. Search Description or Notes	

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

PDF Do	<u>cuments</u>		Proposal
6:23 PM Wed Fel	b 19		
Cancel	Edit Estimate Done		
Estimate I	nformation	1	
Estimate Name	8	1	February 07, 2020
2/9/20		PRO	
0.0	Tax Percentage		
10	Mark-up Percentage	Name Address	
0.0	Discount Percentage	Address 2 City State Zip Code	Estimate Name
Customer	Information		
Name		Summary - Equipment	\$5.000.00
Address		Subcontractors	\$1,500.00
Address 2		Discount	\$0.00
Address 2		Grand Total	\$43,000.00
City		Categories	Customer proposal does
State		appear in the	not include the following:
Zip Code		order they are	Total cost
Customer	Contact	listed. Visit	• Tax
Contact Name		categories and	• Mark-up
Email		reorder as	Labor hours
Phone Number		needed	Crew rate
Set-Up	P	Summary -	
Add New Catego	ory	Rentals	\$30,000.00
Customer Propo	Isal	Equipment	\$3,000.00
		Total Cost	\$43,000.00
Export CSV File		Tax	\$0.00
	9	Mark-up Discount	\$0.00
		Grand Total	\$43,000.00
		Labor Hours	0
Estimat	e Summary	Crew Rate	\$0.00
includes	s the following:		
Total	cost		
• Tay	0001		
• Mark-			Thank you!
	houre		
			stimate Summary
• Crew	rate	Estimate Notes	
• Crew	rate	Estimate Notes	Air Handling Unit Insulation
• Crew	rate	Estimate Notes	Air Handling Unit Insulation Crane

PDF Documents Continued



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.

		CSVEs	timate			 Column headers
Category	Name	Qty	Cost	Subtotal	Note	must match
Labor	Install Equipment	32	55	1760	Enter Notes Here	example
Material	Buy Material	1	100	100	See Quote	 File name must b
Equipment	Buy Equipment	1	5000	5000	See Quote	"CSVEstimato"
Subcontractors	Insulation	8	150	1200	Issue Subcontract	
Rentals	Crane	1	4000	4000	Get Quotes	 Do not leave cells
Other	Bolts	1	500	500	See Quote	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

9:44 AM Sat Feb 8			On My iPad	중 40% ■ Select
Browse		Q Search		Ũ
Locations	~		File folder is created with	in the Files
iCloud Drive		Ŧ	app to store files associa	ted with
🔲 On My iPad		PRO	EstimatorPro	
		EstimatorPro		

9:48 AM Sat Feb 8			奈 39% ∎
	< On My iPad	EstimatorPro	Select
Browse	Q Search		
Locations		Proposal Followare Sunnary www.	
iCloud Drive		The second secon	
🔲 On My iPad	<u> </u>		
🔤 Box	CSVEstimate	CustomerProposal Estimate	Estimatelists.plist
Recently Deleted	Yesterday at 6:41 PM 350 bytes	Yesterday at 6:12 PM Yesterday at 6:29 44 KB 41 KB	PM Yesterday at 6:42 PM 1 KB
Favorites ~			
Downloads	1		
Tags ~			
Yellow	logo		
O Home	Yesterday at 6:09 PM 6 KB		
• Red			
• Green			
Purple			
• Gray		5 items, 8.36 GB available	
	Recents	Browse	

List of files created by EstimatorPro