

WELCOME

Welcome to ImmediaQuote®. This app is perfect for any Contractors who are on the go with an iPad. This app can create estimates and invoices for your customers....simply. I'm a Contractor who created this app after spending countless hours of using paper and pencil and decided to make my life easier.

The operation manual can be located on our website. www.CambranEnterprises.com. In addition, there are some videos showing some of the features of ImmediaQuote®

Install the app from the iTunes Store. Open the app and create an account by creating a username and password. Follow the prompts to create an account. Once you've created an account you're almost ready to start making estimates and invoices.

APPLICATION REQUIREMENTS

An IOS Device (iPad or iPhone) and internet access is required to operate this app.


COMPANY INFORMATION

At the top right of the screen, tap the circle next to the Logout button and you'll be taken to a screen where you can input your Company information. Fill in the information on this page. If you have a company logo, you can upload a jpeg version by tapping the circle which says 'change company logo'. Tap save and you're done.

SAMPLE FILE

Please visit www.ImmediaQuote.com to view a sample customer file. This file showcases many of the features of ImmediaQuote®. Navigate to the Project Information page to review the details of this sample project.

MASTER PRICING PAGE

Before you create your first app you'll need to go to the Master Pricing Page and input your pricing for many of the items or services that pertain to your business. The Master Pricing page can be found by tapping the  symbol located on the main page. Once your pricing is input in the Master Pricing section ImmediaQuote will remember it for future quotes.

Please visit www.ImmediaQuote.com to view an example of how to populate the Master Pricing Page with your pricing.

To add a category tap the **+** sign at the top of page and add your custom category. It's that simple.

To delete a category or subcategory all you have to do is swipe the individual item left to delete it.

To add a subcategory tap the **white +** symbol on the left side of the screen and add your subcategory. Once you've tapped the white symbol you'll be given a few options. You can create an item or product with a specific price. If the subcategory is an item or product just type the name and tap the 'Add' button and tap the 'Add Cost' box and insert your cost. Please note if you insert a price on this page it will carry that amount over to your quote. In the event you want to change the price for a specific client all you need to do tap the price and adjust the price for within the specific quote and make the change.

You can also add titles for certain items such as room names very easily. Once the subcategory box is displayed select the 'Highlighted' box to create your item. This item will be bold faced, underlined and center justified. *See can see an example of this under the Plumbing Category.*

CREATE A NEW CUSTOMER FILE

To create a new customer tap the blue 'Start New File' on the icon on the right side the screen Fill in all the appropriate information for each new customer.

CUSTOMER INFORMATION

On this screen you can insert all your customer's information such as address, email and telephone.

To delete a record (or client) tap the blue trash can in the upper right corner.

In order to make money you'll need to add Gross Profit to each item on your Estimate/ Invoice. You do this globally by inserting a Gross Profit % in the space provided on this page. This can be adjusted at anytime from within this page.

In the event you want to make adjustments to your total profit, this can be done either globally adjusting the Gross Profit within the **Customer Information** page or by adjusting each individual cost within the **Project Information** page.

Once all your information has been inputted into this page make sure to save this page when finished by tapping the blue 'Save' icon at the bottom of the page. Now you're ready to start inputting all your job details. Tap the back arrow at the top of the screen. Now tap the Project Information icon on the right side of the screen and begin.

GROSS PROFIT VS. MARKUP

Many Contractors mistake Markup as Gross Profit. I have found that many Contractors use Markup instead of Gross Profit. Understanding the difference between Gross Profit and Markup can be confusing. ImmediaQuote® only uses Gross Profit. Here is a quick definition of both.

Definition of Gross Profit

Gross Profit is defined as sales minus the cost of goods sold. Think of Gross Profit as being dynamic in that it applies to the entire project.

Example of Gross Profit

If a Contractor sells a product for \$10,000 and its cost was \$8,000, the gross profit amount is 20% (or \$2,000). Gross profit expressed as a percentage of sales.

The formula is gross profit in dollars ÷ the sales price.

Definition of Markup

Markup in dollars is the difference between a product's cost and its selling price. Think of Markup as being static in that it can be just a flat fee added to the cost of the project.

Example of Markup

If the product has a cost of \$8,000 and the Contractor sets a selling price of \$10,000.

The markup is 25% (or \$2,000). Markup is usually expressed as a percentage of the product's cost (not its selling price). The formula is markup in dollars ÷ product cost.

Helpful Note: The Project Total will be rounded to the nearest dollar.
Rounding the Project Total to the nearest dollar will give your
Estimates and/or Invoices a professional look.

PROJECT INFORMATION

Now that you're in the Project Information section of the app you can start adding and deleting items as needed. All of the items from the Master Pricing Page are populated and ready for you to select. To use any of the Categories and Subcategories all you have to do is tap the checkbox of the left side of the screen and adjust the quantities as needed. As previously mentioned you can not only adjust quantities, but also adjust pricing for each client on this page.

In addition, you'll be able to add a custom Subcategory for each individual client. This would be useful for a client who has a unique situation where the Subcategory might be seldom used. Tap the **white +** from within Project Information page to add a Subcategory.

To adjust line item pricing within this page simply tap the plus or minus sign in the quantity section or tap the number in the quantity column to adjust the number.

DROP DOWN MENUS

You can also make custom drop down menus which can display a list of useful information. For example, let's say you would like to choose from a list of particular faucets manufacturers. Start by creating a new Subcategory in the Master Pricing page. Type the name of the Drop Down item and save your item. Add a subcategory tap by tapping the **white +** symbol on the left side of the screen and add your subcategory. Add the name of the Subcategory.

Then navigate to your customer's Project information page and locate the new drop down menu that you created. Tap the blank space next to your drop down item and select one of the items in the list you created. After each item has been created tap the submit button on the right side of the screen and add the next item.

Helpful Note: Please visit www.ImmediaQuote.com to see an example of a drop down menu in the Plumbing Category.

KEEPING YOUR INFORMATION PRIVATE

At the bottom of the **Project Information** screen there is a '**Show/Hide**' button which can be used to prevent your customer from seeing your costs. For instance, as you are gathering information at a client's job site (on your iPad) pricing information may become visible to your client and this is a way of preventing unwanted information being displayed. See **Figure A** below.

Figure A

12:48 PM Fri Sep 6 62%

Project Information

Customer Name : John Doe
Job Description : Bathroom Renovation
Project Total : \$14,573.00

+ Add Category

General Services	Plumbing	Countertops	Notes
+ Countertops	Items	Quantity	Cost
✓ Demolition		2	\$750
✓ Material	Quartz		
✓ Countertop Cost Per/ Sq. Ft.		31	\$112
✓ Room	Kitchen		
✓ Kitchen Sink Cost		1	\$350
✓ Kitchen Sink Type	Quartz Single Bowl		

* Sales Total column is rounded to nearest dollar

Show/Hide

Displays contractor pricing

Project Cost: \$13,407.00
Profit: \$1,166.00
Project Total: \$14,573.00

Show/Hide toggle switch

Contractor pricing Email/Print button

PRINTING OR EMAILING INVOICES OR ESTIMATE

In today's society of comparison shopping or "Googling it", we feel itemizing every item on customers estimates or invoices can lead to potential conflicts during the project. It has been our experience in the past that many customers try to price shop each item resulting in frustration to the Contractor. For that reason, we only show the Sales Total of the project on their invoice.

To print or email a Customer an invoice (or estimate) navigate to the **Opening Page** or the **Job Information Page** within the app and choose the mail or print button icon. Remember printing or emailing to a specific Customer will only display the job Sales Total.

In the event if you'd like to email or print the costs to yourself, select 'Show/Hide' button at the bottom of the **Job Information Page**. Make sure the toggle is in the 'Show' position. A printer icon will appear at the bottom of the page near the Project Total. Tap the printer button and you'll be asked to choose between Estimate or Invoice before advancing. Please note this icon should **ONLY** be used by the Contractor because it will display your costs along with profit. See **Figure A** below

Helpful Note: If you ever need to get into a discussion with a Customer about individual sales pricing about particular items on the Estimate or Invoice you can always refer back to the **Project Information** page and see that pricing in detail. The Unit Sales Price Column is the per unit cost of each item.