Gold Support Webinar Series:
Develop Scope and Budget with Mobile Quote

This webinar was created to provide an introduction to revisions and change orders with 30 - 40 minutes of feature introduction and demonstration followed by a Q&A period.

Session Topics

- Getting Started
- Sync with SI Catalog
- Managing Quotes
- Creating a Quote
- Editing a Quote
- Reviewing a Quote
- Approve and Sync a Quote

Create an SI Project from a Quote

Notes

Getting Started

- Mobile Quote 2.0 is a companion iPad for System Integrator

    - Develop Scope and Budget

    - Get approval for that scope and budget during the initial client meeting

    - Shorten the sales cycle and reduce the time it takes to create a proposal

- To get started, download the App from the Apple App Store

- After launching the app, you can:

    - Connect and sync with SI

    - Use sample data to evaluate Mobile Quote before buying a license

- To connect with your SI server, you need:

    - Mobile Quote licensing

    - Your SI Server IP Address and login credentials

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Notes

ACTIVITY 1 – CONNECT WITH SI OR USE SAMPLE DATA

1. After installing Mobile Quote 2.0 from the Apple App Store, open the application.

2. The 'Welcome to D-Tools Mobile Quote' window opens.

3. To try out Mobile Quote with sample data, select 'No thanks, I'll use sample data'. This will configure Mobile Quote with available sample data. You can create Mobile Quotes but you cannot send them to SI.

4. To link Mobile Quote to your SI Server, select 'Connect to SI'.

5. Now the 'Register your Device with SI' window opens. Enter the required data:

    a. Device Name – to identify who iPad is associated with a Mobile Quote.

    b. SI Server Address.

        i.   If you host your own server, this should be the server's LAN IP Address.

        ii. If you want to sync remotely, the server must be configured to be visible through your firewall.

        iii. If your SI Server is hosted, the IP Address you use to sign-in to SI should be used.

    c. Port – the default port for Mobile Quote is 9011

    d. SI User Name – the same user account info you use to sign-in to SI

    e. SI Password - the same user account info you use to sign-in to SI

    f. Click Register.

6. If registration is successful, the message 'Device Validated' should be displayed.

7. Click Close and you will be prompted to 'Sync Catalog!'. Choose Yes or No to proceed.

8. If you need assistance, click Help on the bottom-right of the screen.

Notes

Sync with SI Catalog

- After connecting to your SI Server you are prompted to "Sync Catalog"

- Syncing with the Catalog ensures that you have the latest:

  - Product Categories

  - Packages

  - Labor Rate

  - Tax Rates

  - And other default settings

- In the upper-right corner is a message identifying when you last synced

- To sync again, click the "heartbeat" icon

Notes

ACTIVITY 2 – SYNC WITH SI CATALOG

1. In Mobile Quote, from the 'My Quotes' window, click the 'heartbeat' icon in the upper-right of the screen.
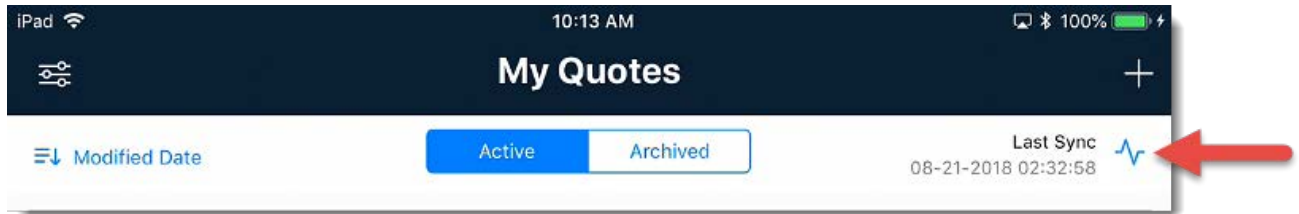
2. A 'Sync Catalog' message appears with a progress spinner.
3. When the sync is complete, a message displays.
4. Click 'Thanks' to [Compare] return to the 'My Quotes' window.

Notes

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Managing Revisions and Project Approval

- Tapping the Ellipsis to the right of a quote allows you to:
    - Open a quote
    - Clone a quote
    - Archive a quote
    - Rename a quote
    - Sync (the quote) with SI
    - Delete a quote
- Archived quotes are moved to the Archived quotes list

Notes

Creating a Quote

- To create a quote, tap the plus (+) in the upper right hand corner of the screen

- This launches a series of five setup screens

- Only two pieces of info are necessary

  - Quote Name and Client Name

- Client Information

  - Provide additional contact information from contacts on your iPad

- Set Pricing Guidelines

  - They include Tax, Labor Tax, Target Budget and Labor Difficulty

  - You can also set a Price/Quality level of Good, Better or Best

  - Project Types allow you to store default pricing guideline data

- Define Scope and Objective

  - Type in a scope or use the speech to text capabilities of your iPad

  - Select a meeting objective. Objectives are defined in SI

  - The objective determines the text shown when approving a quote

- Retainer/Deposit Amount

  - Request Retainer/Deposit (as percentage, fixed amount or per sq. ft.)

- 'Use Contingency' applies a percentage to all prices for budget purposes

Notes

ACTIVITY 3 – CREATE A QUOTE

1. Start by tapping the plus '+' symbol in the upper-right hand corner of the screen.

2. The 'New Quote' window opens. Type a name for the quote.

3. If you like, choose a 'Project Theme' to add an image at the top of your quote that is reflects the type of project.

4. Click Next

5. On the 'Client Information' screen, enter a 'Client Name'.

6. Type in additional contact info or click 'Import' to add contacts saved on your iPad.

7. Click Next

8. The 'Set Pricing Guidelines' screen allows you to set tax rates, a target budget and adjust labor difficulty. This can be entered in two ways:

    a. Type the data manually.

    b. Pick a 'Project Type' which includes these values.

9. Next you can add a scope of work and set a meeting objective.

10. For the scope, you can type it or use speech to text feature on your iPad.

11. Meeting Objectives are defined in SI. Choose an option. The Default is 'Define Scope'. Click on the name to choose another objective.

12. Click Next.

13. On the 'Retainer/Deposit Amount' screen you can choose to use a design retainer value and/or a budget contingency as defined in your 'Project type'.

14. Click Done to open your quote.

Notes

Editing a Quote

- After creating your quote, you can adjust quote settings by clicking the link in the upper-right

- The project type can include pre-determined systems and locations

- To add rooms, click the Add Room button in the upper-right

- Notice the quote total is listed below the quote name in the top-center

- From the bottom select the Room, System or Summary views

- In the room or system view, swipe left on a name to remove it from the list

- With a room selected, click Add Items below a system name to add packages or allowances based on product categories

- To edit an item, tap on the item. This allows you to adjust quantity, unit price, labor hours and add comments. Items can be set as OFE.

- To rearrange items in the quote, swipe right on a system/room name, click edit and use the pancake icons to adjust

- Tap and hold a package from the items drawer to add to multiple rooms

Notes

Reviewing a Quote

- Click Summary at the bottom of the screen to see a summary view

- This provides system and room totals

- The summary breaks down equipment, labor, estimated taxes and a total

- If a contingency was added, the total is a price range

- Click the arrow next to a room name to see an expanded view of the items within the room

Notes

Approve and Sync the Quote

- Click the Approve Quote button to open the approval window

- The approval language is directly tied to the selected meeting objective

- A signature line is available for the client. They tap Approve when done

- The Send Email option creates an email based on the template data in the quote settings

- After sending the message, click Save and Close

- Returning to the quotes list, notice the quote is now approved.

- To send the quote to SI, tap the Ellipsis to the right and choose Sync with SI

- After syncing, the quote will be available in SI to create a project

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Notes

Create an SI Project from a Quote

- Open SI and click Start -> Mobile Quotes -> Manage Mobile Quotes

- This opens your list of available Mobile Quotes

- To create a project, select a Mobile Quote, then click Create in the Project section of the command ribbon

- The New Project Wizard opens and it should already be populated. Click Save. The project is created and the project Editor opens.

- From the editor, find the Mobile Quote Explorer, a pop out window located on the left of the screen by default

- Select an item from the pop out and click Add to Project

- Packages will be added directly from the Catalog

- Items added from Categories will filter the catalog view and all you to add an item from the category

Notes

Training content complete

- Questions?

- Support Resources Available

    - D-Tools Application Home Page Links

        - [Documentation](#) – open the Support Wiki

        - [Support Ticket](#) – open the web page to create a support ticket

        - [Chat With Us](#) – Launches Chat Support

    - From any D-Tools software interface, click Learn More

        - Found in the upper-right corner

        - Launches the Support Wiki

    - Open the Support Wiki directly at support.d-tools.com

    - Send an email to support@d-toolshelp.com

    - Call 866.386.6571

Notes