



QuoteNerd™ Pro

Release 2.4.x

User Guide
For

For Palm OS

This manual describes the features of the QuoteNerd Pro handheld application and the PC Companion software. References to **QuoteNerd** in this manual refer to the **Professional** version of QuoteNerd and may not be applicable to the **Lite** version. Gabriel Software strongly recommends that you take the time to go through this manual before using the QuoteNerd for business purposes. There are many features and settings that can be customized to make using QuoteNerd as simple as operating a handheld calculator.

We are confident that once you've read this manual and started using the QuoteNerd in your day to day business, you'll wonder how you ever worked without it!

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IMPORTANT: Please read the **Software License and Limited Warranty** accompanying this product before using the QuoteNerd™ software. Using the **QuoteNerd™** software indicates that you accept the terms of the **Software License And Limited Warranty**.

Introduction

What is a QuoteNerd™?

QuoteNerd is a handheld application designed specifically for small to mid-sized businesses that need to create line item based Estimates, Quotes and Invoices on a per client or job basis. Depending on the business, line item charges may be for materials or services provided, or both. Unlike many quoting and invoicing applications, QuoteNerd supports both material and service charges per line item. In addition, QuoteNerd Pro supports automatically calculating item quantities dependent on user defined linear measure (length), area or volume. Dependent items are a feature of QuoteNerd Pro and are not supported in the QuoteNerd Lite version.

Purpose

The purpose of this User Guide is to introduce you to the general operation of the QuoteNerd tool. Upon reading this guide and following the simple examples within, you will quickly become adept at using the QuoteNerd.

Assumptions

This manual assumes that the user is familiar with the general usage of a Palm OS based handheld computer (handheld) also commonly referred to as a Personal Digital Assistant (PDA). Basic usage instructions can be obtained from the User Guides that are supplied with your handheld.

What's new in release 2.4

The following major features and enhancements were added to **QuoteNerd Pro 2.4.0**:

- **Automatic price updates for Job Template Items.** When a new template item is created from an item in the Catalog, the template item will be linked to the Catalog item from which it was created. Changes to the **unit costs and markups** of a Catalog item will automatically be reflected in all template items that are linked to the Catalog item. This means that new client jobs created from a Job Template can automatically get the latest pricing information in your Items Catalog.
- **Support for global Find** on the handheld.
- **Export Client Address** to remote handheld or local address book. Feature available on handhelds with **Palm OS 4** and later.
- **Print the Client Job Summary.** The job summary information can now be printed via the **PC Companion** application.
- **Print to Text File.** Both the **Quote** and **Summary** can optionally be "printed" to a simple text file via the **PC Companion** application.

- **Scrollbars** added to all lists. Now use scrollbars or scroll buttons, on the handheld, as you prefer. Note that this change has not yet been reflected in this manual.
- **Improved** Summary and Quote displays and PC printing font support.
- **Starter Items Catalog** provided.

Please refer to the "What's New" readme file, included with the QuoteNerd ZIP distribution file, for further information regarding enhancements in the specific release that you are installing.

Getting Started

Handheld Requirements

- Palm OS version of 3.5 or later.
- 8 MB of RAM memory are recommended. QuoteNerd will install with as little as 512 KB of free memory space available. QuoteNerd's total memory requirements are dependent on the amount of data being managed by the application.
- PalmPrint printer driver (Steven Creek Software: <http://www.stevenscreek.com/palm/index.shtml>). This third party software must be installed in order for QuoteNerd to print directly from the handheld.

PC Requirements

- Palm Desktop version 3.5 or later. PalmOne offers free desktop upgrades for Palm users (<http://www.palmone.com/us/software/desktop/>).
- Java software for the desktop. SUN Microsystems offers a free java download (www.java.com). The Java desktop software is required by the QuoteNerd Pro PC Companion application.
- 30 MB of free disk space recommended.
- Windows 98, Windows XP
- 128 MB of RAM memory. 256 MB recommended.

Installation

The QuoteNerd distribution ZIP file contains an installation readme file. The readme file distributed with the QuoteNerd may contain more up to date information than is detailed in this section, as well it may contain as HTML hotlinks to further information on the WEB. Please follow the instructions in the installation readme file if that file is available to you.

All that is required to install QuoteNerd on the handheld is the QuoteNerd PRC file. If you are only installing the handheld portion of the QuoteNerd then follow these instructions:

- To install QuoteNerd on your handheld, extract the PRC file from the zip archive. Normally, Palm applications are stored in the Palm Add-on folder which is usually located in C:\Palm\Add-on. If your Palm desktop software has been installed correctly, you need only double click on the QuoteNerd PRC file and the Palm Install Tool will prompt you to specify the user name associated with the handheld on which to install the QuoteNerd

application. Once you have completed this step, QuoteNerd will automatically be loaded to the handheld the next time you perform a Hotsync with the handheld in the USB or Serial cradle.

The remainder of this section deals with installing the full QuoteNerd Pro application. The full install consists of the QuoteNerd Pro handheld software, the PC conduit software used to synchronize the QuoteNerd handheld data with the QuoteNerd PC data, and the QuoteNerd Pro PC Companion desktop application software.

QuoteNerd is distributed in Zip archive file format. The QuoteNerd zip file contains this manual, a Software license agreement, and the QuoteNerd files to be installed on the handheld and desktop. Read the license agreement before installing and using the QuoteNerd tool.

Updating a Previous Installation:

- Extract the QuoteNerd Pro files from the distribution zip file to a temporary folder on the PC.
- Launch the **Install** tool (Install.exe) included with the QuoteNerd Pro distribution zip file. The Install tool will copy QuoteNerd Pro application and conduit files to the QuoteNerd Pro application folder (C:\QuoteNerdPro). In addition, Install will register the QuoteNerd Pro conduit synchronization software with the Palm Desktop Software as well as launch the Palm application installer to queue the QuoteNerd Pro handheld application for transfer to the handheld during the next HotSync session.
- HotSync the handheld with the PC to transfer the QuoteNerd Pro application to the handheld.

Installing for the First Time:

If you are installing QuoteNerd Pro for the first time, you will need to ensure that you have the required system support software installed on your PC. The QuoteNerd Pro PC software consists of a conduit that handles the synchronization of the handheld and PC data as well as a user application called the PC Companion. The required system support software is freely available from Palm One and Sun Microsystems. The required system support software is listed below:

- Palm Desktop Software version 3.5 or later. The Palm Desktop Software was supplied with your Palm handheld. It contains the basic synchronization support (HotSync) as well as the PC applications for accessing the addressbook, memopad and other built-in applications, via the PC. You can determine the version of your Palm Desktop software by opening the Palm Desktop application and selecting the **Home | About Palm Desktop** menu item. If you need to upgrade your Palm Desktop Software, you can download the latest version for your handheld, free of charge, from <http://www.palmone.com/us/software/desktop>.
- Palm Desktop support software for Java based conduits (JSync). This software is supplied free of charge by PalmOne however it is not shipped with the handhelds. If you do not know whether this software is currently installed on your PC then more than likely it is not. You can download the JSync Installer from our website at <http://www.gabrielsoftware.com/Palm/Downloads/JSyncInstaller.exe>. Open the JSync

Installer application after you have downloaded it and it will automatically install the necessary synchronization support required by QuoteNerd Pro and any other Java based conduits for the Palm OS handheld, that you may install in future.

- The QuoteNerd Pro PC Companion application is a Java based application. As such it requires that a Java runtime environment be installed on the PC. Since many websites use Java technology, you may already have the Java runtime system software installed on your PC to support your Web Browser. If you are not certain that you have Java installed on your PC or you know that you have a very old version of the Java runtime software installed, download the latest version, free of charge, from <http://www.java.com>.

After ensuring that you have the required system support software installed on the PC, you are ready to install the QuoteNerd Pro PC software. Follow these simple steps to install the QuoteNerd Pro PC software:

- Extract the QuoteNerd Pro files from the distribution zip file to a temporary folder on the PC.
- Launch the **Install** tool (Install.exe) included with the QuoteNerd Pro distribution zip file. The Install tool will copy QuoteNerd Pro application and conduit files to the QuoteNerd Pro application folder (C:\QuoteNerdPro). In addition, Install will register the QuoteNerd Pro conduit synchronization software with the Palm Desktop Software as well as launch the Palm application installer to queue the QuoteNerd Pro handheld application for transfer to the handheld during the next HotSync session.
- HotSync the handheld with the PC to transfer the QuoteNerd Pro application to the handheld.
- The QuoteNerd Pro handheld application is entitled **QNerd Pro**. Locate **QNerd Pro** in the list of applications on the handheld. Launch the **QNerd Pro** application on the handheld by selecting it from the list of applications.
- HotSync the handheld with the PC one more time. This will cause the presence of the handheld application to be detected by the PC.
- Launch the QuoteNerd PC Companion application by opening (double click with the mouse) the **C:\QuoteNerdPro\QuoteNerdProW.exe** Windows application. The QuoteNerd Pro PC Companion will automatically detect all Palm OS handhelds on which you have installed the QuoteNerd Pro application.
- Close the QuoteNerd PC Companion. At this point, you may want to make a shortcut to the PC Companion and place the shortcut on the desktop for easy access in future. To create a shortcut, right click on the **QuoteNerdProW** application and then select **Create Shortcut** on the popup menu. A short cut will be created in the C:\QuoteNerdPro folder. Drag this shortcut to the Windows desktop.

QuoteNerd Pro will operate for a limited time period (normally 30 days) prior to registering the software. After the trial use period has expired, QuoteNerd will no longer function until a registration code is supplied via the QuoteNerd Registration Form on the handheld. All data you may have entered prior to the trial use expiry date will remain on the handheld and PC so that you may register at any time and then continue using QuoteNerd with the

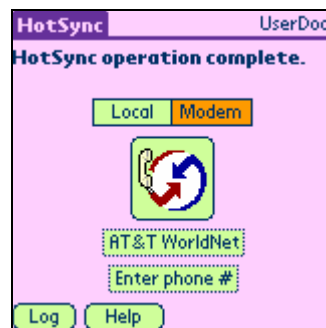
data entered prior to registering. A registration code will be issued to you when you purchase a QuoteNerd software license.

Note that the QuoteNerd Company name information cannot be entered or changed without supplying a valid registration code.

Registering your QuoteNerd Software Application

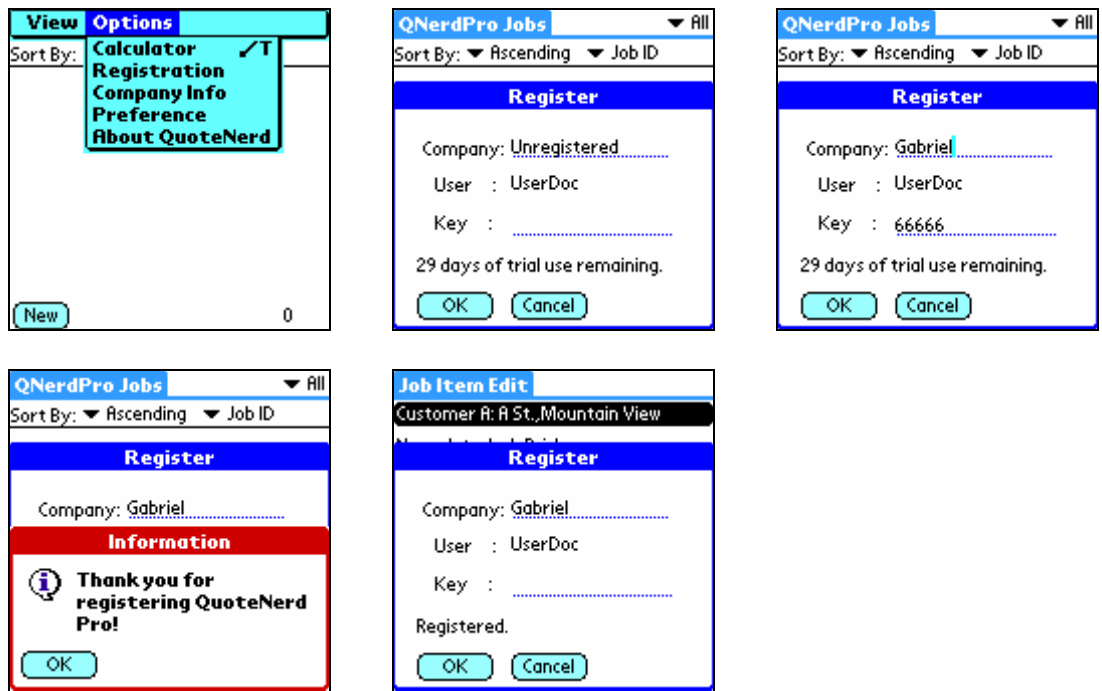
QuoteNerd Pro has a trial use evaluation period of 30 days. After the trial period you must register the application for your handheld by purchasing a user license. QuoteNerd Pro will remind you to register as the trial period draws to a close. If you neglect to register the application by the end of the trial period you will no longer be able to access the data that you have entered into the application until registration is complete. Naturally, you do not need to wait until the trial period expires before registering the QuoteNerd Pro application.

The registration key is based on the handheld user name on which QuoteNerd is installed. Thus each key allows registration on only one handheld. You can determine your handheld user name by starting the HotSync application:



The user name is displayed in the upper right hand corner. In this example the handheld user name is "UserDoc".

Once you have purchased a user license for the QuoteNerd application, you will be issued a registration key. The registration key can be entered in the **Registration** form. The **Registration** form also gives you the option of changing your Company name. The Company name is used in the printing of Quotes and Invoices, so you will want to change it when registering QuoteNerd. The Company name can be changed at any time via the **Registration** form if a valid registration key is provided. This is the only way to change the Company Name.



Customizing QuoteNerd

The first thing to do when starting QuoteNerd (other than registering it if you have a registration key) is to enter your company information and general preferences. Both of these actions can be performed from the Options Menu shown above.

Company Information

Select **Options Company Info**

Once you have registered the QuoteNerd (menu **Options Registration**), the Name field will display the company name that you entered in the Registration form.

The Country field is set via the Preferences form described in the next section. All other information regarding your company can be changed at any time in this form. Modifying the company information is best done using the Palm virtual keyboard.

Preferences

The **Options Preference** menu item allows setting of the user's country and tax names.

Select your country of origin using the popup list.

QuoteNerd provides for up to two tax rates to be used in a job. You can modify the default names of these taxes in the Preferences form. For instance, change the Tax1 name to SST (State Sales Tax) or NYST (New York Sales Tax) etc. In Canada, certain provinces have a separate Provincial Sales Tax (PST) and a federal Goods and

Services Tax (GST) so the Tax1 name might be changed to PST and the Tax2 name changed to GST.

Organization of the QuoteNerd

QuoteNerd is organized into three major sets of forms that are referred to as **views**. Each view deals with a different aspect of the QuoteNerd data. The views are:

1. Client Jobs

The Client Job forms are commonly referred to as the Job forms. These are the forms used to manage client estimates, quotes and invoices.

2. Items Catalog

The Items Catalog forms are used to manage a Catalog of line items that may be added to Jobs or Job Templates. Essentially, the Catalog items are templates to be used as line items in client jobs. The Item Catalog forms are very similar to the forms used to manage items in the Client Jobs and Job Templates.

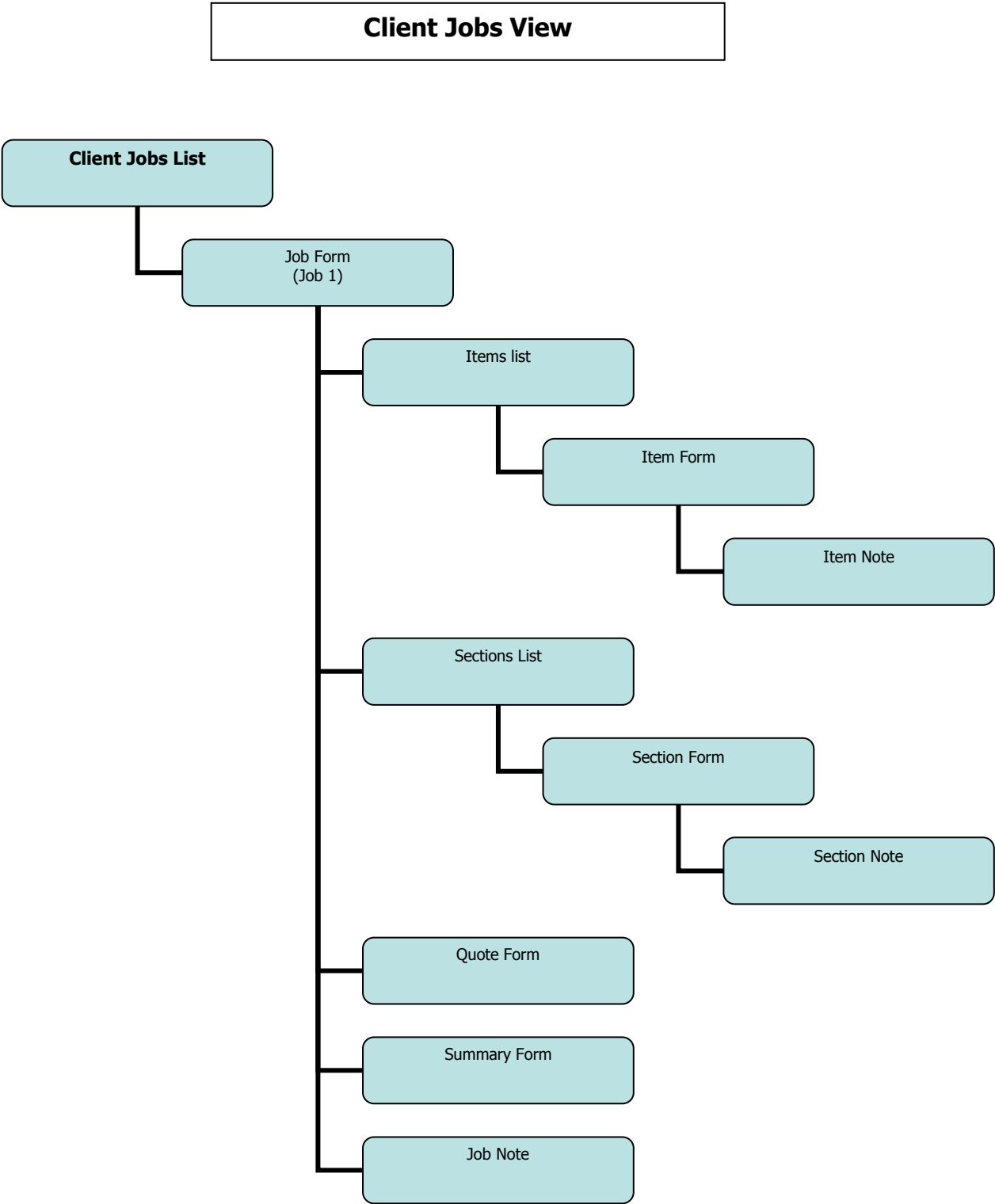
3. Job Templates

Job Template forms are used to manage a list or catalog of ready-made jobs. The job templates serve as a starting point when setting up new Client Jobs. The Job Template forms are similar to the Client Job forms.

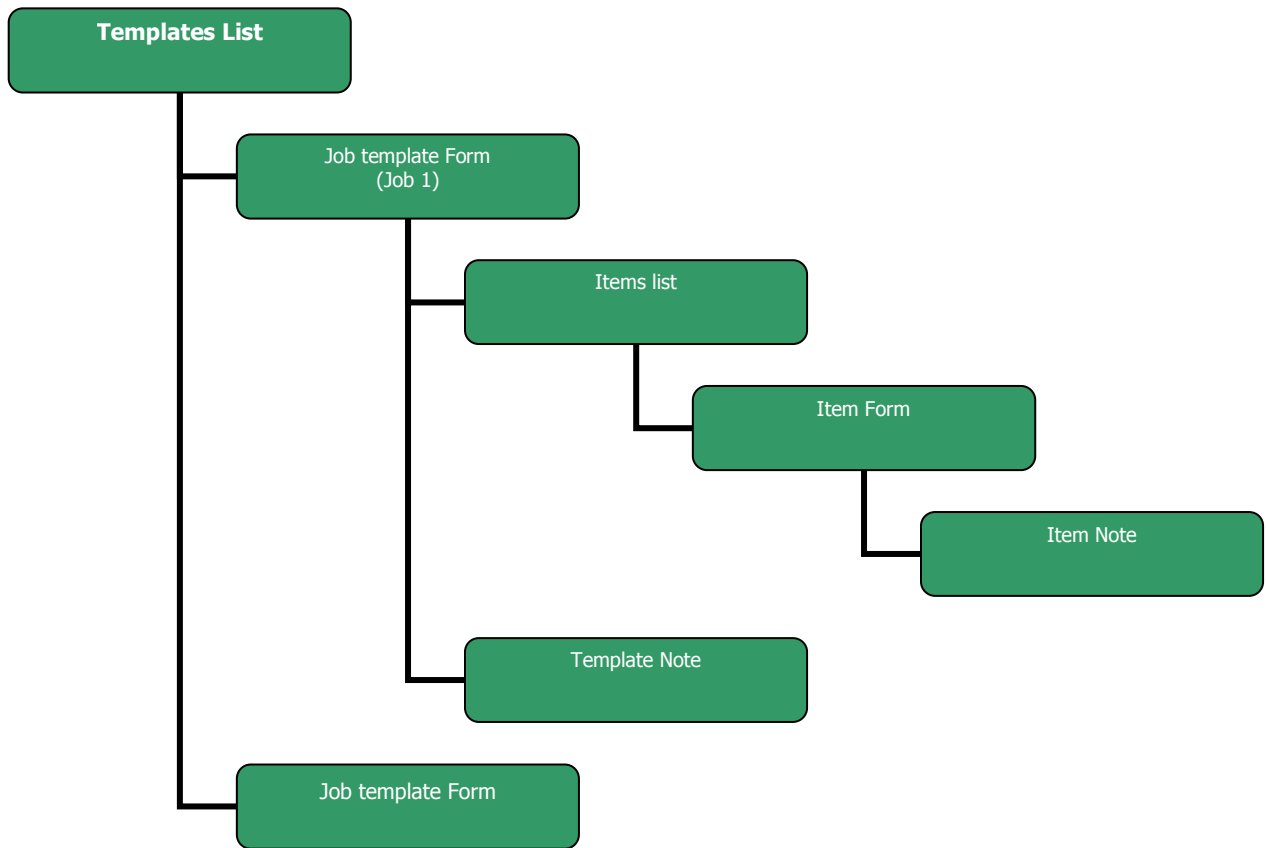
All major forms contain a **View** menu on the menu bar. The **View** menu allows you to switch from one set of forms to another and back again. QuoteNerd remembers where you were previously in a view and returns you to the form that you were last using much the same as most Palm applications – including QuoteNerd - will return you to the form you were last using when you re-open or launch the application.

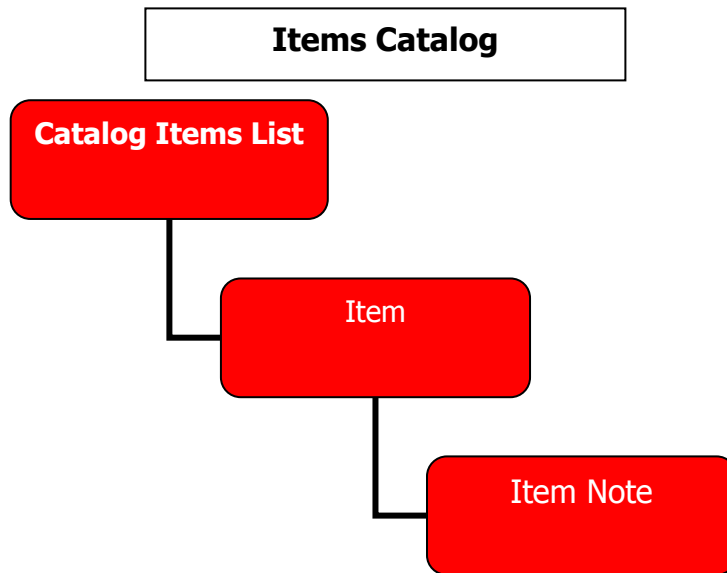
Most of the major forms in the QuoteNerd contain a **Back** and a **GoTo** button. The **Back** button will switch back to the previous form in the current form set (view). This allows you to “ping pong” back and forth between two forms in a set so that you can change information in one form and then see the affect of the change in the other form at the touch of the **Back** button. The **GoTo** button allows you to go to a **specific** form in the current view’s form set. The following briefly details the hierarchy (ordering) of the form sets.

Forms Hierarchy



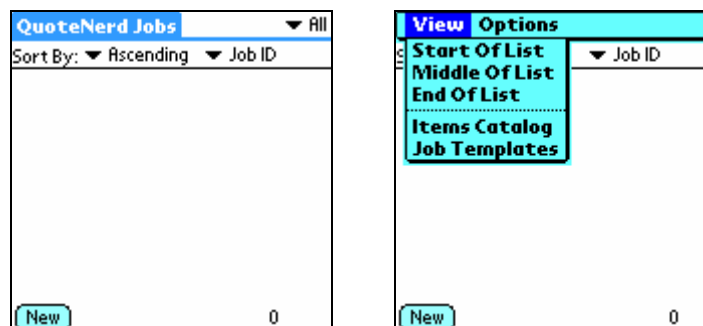
Job Templates View





Setup a Default Job Template

A very useful second step in configuring QuoteNerd is to setup a default Job template to be used in creating new Client Jobs. Managing Job templates is covered in more detail later in this guide. However, it is worthwhile to quickly setup one default Job template now. From the menu bar of the main Client Jobs form, entitled "**QuoteNerd Jobs**", select the "**View Job Templates**" menu option:



This will display the **Template Jobs** List form. Naturally, there are no Job templates listed at this point. Select the **New** button to create one.

Note that the Country is already entered. This information reflects the choice of country in the preferences form. Change the Name field to "Basic Job" or a similar label that you prefer (hint: double tap on the field text to highlight it before entering your choice of name).

Now, fill in fields on the form that will be common to most Jobs. These will normally be City, State and Country and possibly the Phone area code. The form should now look similar to the following:

Now select the Details button to enter further template information:

Template Edit Unfiled

Name: Basic Job

Details

Description:

Discount(%): 0

SST(%): 0

Tax2(%): 0

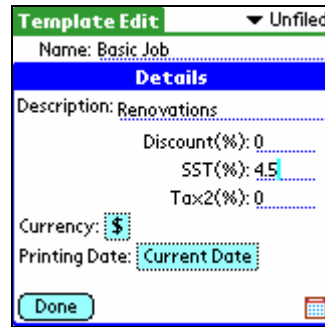
Currency: \$

Printing Date: Current Date

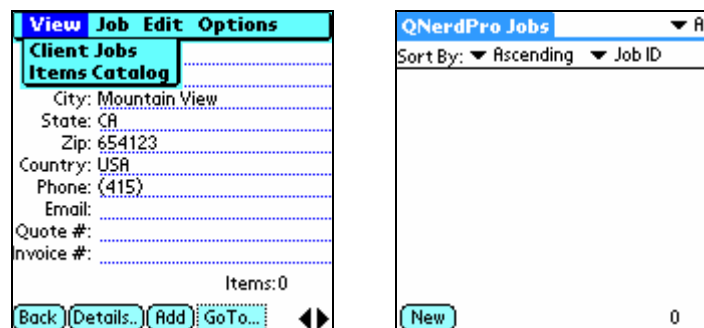
Done

The minimum that should be entered here is the tax rates. In our example the Tax1 name has been changed via the **Options Preference** menu to SST (Tax1). We will not be applying Tax2 to our example jobs, so it is left unchanged at 0%. Your tax names will be listed as you specified them via the **Options Preference** menu or as Tax1 and Tax2 if you made no changes to the default names.

When we are done our example looks like this:



Select done and return to Client Jobs by selecting the **View Client Jobs** menu item.

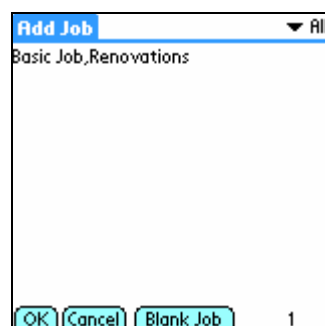


Managing Client Jobs

In this section we will briefly cover setting up a new client job.

Create a New Job

QuoteNerd does not have any jobs in its database when it is first installed on the handheld. So, our first client job is created in the empty QuoteNerd Jobs form. Select the **New** button. The **Add Job** dialog form will popup:



The **Add Job** dialog displays a list of Job templates that can be used as a starting point for the new job. If you created a basic template job earlier, you will see the Basic Job template listed. If you select the "Basic Job" (by highlighting it with the stylus) from the displayed list and then select the **OK** button, the job template,

including all line items associated with it, will be copied to the client jobs database. The alternative is to create a brand new job from scratch by selecting the **Blank Job** button. For now select the basic job template and inspect the resulting Job form.

The left screenshot shows the 'Add Job' dialog box with a dropdown menu set to 'All'. The list contains 'Basic Job.Renovations'. At the bottom are buttons for 'OK', 'Cancel', and 'Blank Job', along with a counter '1'.

The right screenshot shows the 'Job Edit' form with a dropdown menu set to 'Unfiled'. The form contains the following fields: Name: Job1, Street: (empty), City: Mountain View, State: CA, Zip: 654123, Country: USA, Phone: (415) (empty), Email: (empty), Quote #: (empty), Invoice #: (empty), Status: Estimated (dropdown), and Items: 0. At the bottom are buttons for 'Back', 'Details..', 'Add', 'GoTo...', and a double arrow button.

The new client job contains all of the information that we entered into the default job template excepting that the name field has been changed to a name based on the job ID number of the job. All QuoteNerd client jobs, templates and item records are assigned unique ID numbers when created. The ID number is just a short form method of uniquely identifying a job or line item in the software. The next step after creating a new job would normally be to enter the client information and set up the Description and tax rates for the job by selecting the **Details** button.

The screenshot shows the 'Job Edit' form with the 'Details' tab selected. The fields are: Name: Job1, Description: Renovations, Discount(%): 0, SST(%): 4.5, Tax2(%): 0, Currency: \$, and Printing Date: Current Date. At the bottom is a 'Done' button and a small calendar icon.

However, in this case the default tax rates that we set up in the job template are sufficient and we need only change or add information specific to the client.

The screenshot shows the 'Job Edit' form with the 'Details' tab selected. The fields are: Name: Job1, Street: (empty), City: Mountain View, State: CA, Zip: 654123, Country: USA, Phone: (415)555-5555, Email: (empty), Quote #: 1002, Invoice #: (empty), Status: Estimated (dropdown), and Items: 0. At the bottom are buttons for 'Back', 'Details..', 'Add', 'GoTo...', and a double arrow button.

Add Line Items to a Job

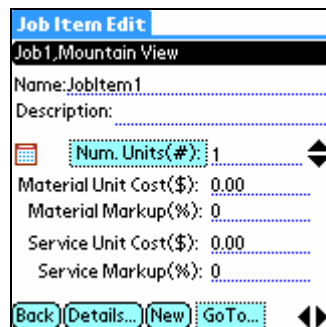
At this point our client job has no line items. We will add a couple of line items to the job with the intent of demonstrating the ease of doing so as well some of the powerful features of the QuoteNerd.

Select the **Add** button on the Job form to display the **Add Items** dialog.



The **Add Items** dialog displays a list of items in the Catalog. At this point we are a little ahead of ourselves since we don't have any ready-made items in our Catalog yet. We have two choices; we can create some items in the Catalog, using the **View** menu to switch to the Items Catalog view, and then come back to our client job and add our Catalog items or we can add a **Blank Item** to the job. For now we will just create an item from scratch using the **Blank Item**. The Items Catalog will be addressed, in more detail, later in this guide.

Select the **Blank Item** button.



The Item fields are described below:

1. Name

This is a short name/title for the line item. This should be a generic name to keep it short for displaying in tables on the handheld.

2. Description

This is a detailed name or explanation of the line item. QuoteNerd will display as much of the description as will fit after the Name.

3. Quantity

This is the specified nominal quantity for the line item. You do not need to include a waste or contingency factor in this figure – QuoteNerd can do this automatically. You do not need to round this number up to a whole number in cases where partial units do not apply QuoteNerd can do that automatically as well. See **Item Details** below for further information regarding rounding and waste factors.

4. Material Unit Cost

This is your material cost (wholesale), not necessarily the cost to your customer.

5. Material Unit Mark-up

This is your percentage mark-up (gross profit) on material. The customer's cost or charge is the sum of your material cost + your mark-up. Calculating and tracking mark ups is a feature of QuoteNerd. If you don't want to use this feature, just include the mark up in the unit cost.

6. Service Unit Cost

This is your cost of labor or other service charges per unit of the line item. If you are paying others for labor or services, this figure is rather obvious. However, if you are self employed and do not receive a set salary from the business it is not quite as easy a figure to determine. How accurately you can determine this figure is a good indicator of how well you are managing your business. You should "know your cost per mile" as they say in the Trucking industry.

7. Service Unit Mark up

This is your percentage mark-up (gross profit) on the service and labor you provide. The customer's cost or charge is your service cost + your mark up.

Our first job item will be very simple one. We need to supply a dumpster to remove waste material from our renovation site. We are limited to using a small dumpster due to job site space limitations. The dumpster is supplied by a third party service.

Setup the first job item is follows:

Job Item Edit
 Job1,Mountain View
 Name:Dumpster
 Description:4x8 small box
 Num.Units(#): 1
 Material Unit Cost(\$): 0.00
 Material Markup(%): 0
 Service Unit Cost(\$): 115
 Service Markup(%): 0
 Back Details... New GoTo...

We also need to specify how taxes apply to this item and how quantities are to be handled. Select the Details button:

The sequence of screenshots shows the configuration of the **Details** tab for the 'Dumpster' job item. The settings are as follows:

- Billable:** ☒ (checked)
- Whole Units:** ☒ (checked)
- Lot:** ☐ (unchecked)
- SST:** N/A
- Tax2:** Material Only
- Material Waste Factor(%):** 0
- Qty Dependency:** None

The sequence shows the selection of 'Material Only' for Tax2, then 'Service Only', and finally 'Both'.

We have specified that this item is a billable item and that unit quantities must always be rounded up to the next whole (non-fractional) number. In addition, SST (State Sales Tax) applies to service charges for this item and Tax 2 doesn't apply. Another important aspect is that there is no quantity dependency for this item. This means that we will specify the required number of units (number of dumpster bins used). We will discuss item quantity dependency in more detail later. Note that in this example we are passing our cost straight through to the customer – no mark up is added for our overhead in dealing with the supplier of the dumpster.

Our second job item is much more interesting than the first. This item will demonstrate some truly powerful estimating features of QuoteNerd Pro.

In our example we are drywalling an area measuring 14 Ft. by 26 Ft. by 7.5Ft high (a typical basement room). The drywall will be installed, taped and sanded, ready for painting. We will use 4x8 Ft. sheets of drywall (32 Sq. Ft. each). Our new line item can be created directly from the current item, using the **New** button.

Select the **New** button to create a new item. From the **Add Items** form select the **Blank Item** button as we did earlier for the first item we created:

The first screenshot shows the 'Job Item Edit' form for 'Job1,Mountain View'. The 'Name' field is 'JobItem1' and the 'Num.Units(#)' is 1. The 'Material Unit Cost(\$)' is 0.00, 'Material Markup(%)' is 0, 'Service Unit Cost(\$)' is 0.00, and 'Service Markup(%)' is 0. The 'Add Items' form is shown in the middle, displaying 'Empty item catalog.' with 'OK', 'Cancel', and 'Blank Item' buttons. The second screenshot shows the 'Job Item Edit' form for 'Job1,Mountain View' with 'Name:JobItem2' and 'Num.Units(#): 1'.

Modify the new job item to look like this:

The screenshot shows the 'Job Item Edit' form for 'Job1,Mountain View'. The 'Name' field is 'Drywall' and the 'Description' is '4x8 Sheets - installed &'. The 'Num.Units(#)' is 1. The 'Material Unit Cost(\$)' is 6.95, 'Material Markup(%)' is 20, 'Service Unit Cost(\$)' is 32, and 'Service Markup(%)' is 30.

At this point we could enter the number of drywall sheets (room perimeter * height / area per sheet = $(2*(14+26))*7.5/32 = 18.75$ Sq. Ft.). However, we aren't going to do that because QuoteNerd provides an easier way to do this. We will create a Job Section that describes the wall area and then have QuoteNerd do the quantity calculations based on the Section. A job section is just a description of a physical dimension related to the job. Any number of job sections can be defined for a job and any number of line items can be made dependent on a job section to determine the number of item units required.

To create a Job Section, first go to the Job's Sections list. Select the **GoTo** button and then select **Sections List** from the available forms displayed in the popup menu:

The first screenshot, titled 'Job Item Edit', shows a form for 'Job1, Mountain View' with fields for Name, Description, and Num. Units. A popup menu is open, showing options: Summary, Quote, Item Note, Items List, Sections List (highlighted), Job Form, and Jobs List. The second screenshot, titled 'Job Sections', shows the same job view but with a 'GoTo...' button at the bottom right.

This job has no Sections defined as yet. Select the **New** button in the **Sections List** to create a new section. Name the section "Basement walls".

The first screenshot, titled 'Job Section Edit', shows the form for 'Job1, Mountain View' with the 'Name' field set to 'J1S1'. The second screenshot, also titled 'Job Section Edit', shows the same form with the 'Name' field set to 'Basement walls'.

The room perimeter length is $2 \times (14 + 26)$. Use the built-in calculator to calculate and enter the value into the section length field. Select the calculator icon beside the length field, perform the perimeter calculation and then select the **RetVal** button to return the value to the section form:

The first screenshot shows a calculator interface titled 'Job Section Edit' with the text 'Calculate Length'. The display shows the value 80. The second screenshot shows the 'Job Section Edit' form for 'Job1, Mountain View' with the 'Name' field set to 'Basement walls' and the 'Length(x)' field set to 80.

Now enter the wall height in the height field and then select another field such as the area field. The section height will be calculated and displayed.

Job Section Edit
Job 1, Mountain View
Name: Basement walls
☒ Auto Calc Area ☒ Auto Calc Vol.
Length(x): 80
Height(y): 7.5
Area = 0
Depth(z): 0
Vol = 0
Back New GoTo...

Job Section Edit
Job 1, Mountain View
Name: Basement walls
☒ Auto Calc Area ☒ Auto Calc Vol.
Length(x): 80
Height(y): 7.5
Area = 600
Depth(z): 0
Vol = 0
Back New GoTo...

Let's go back to the drywall item and make that item dependent on the area defined by this section. Select **GoTo Items List**. From the **Items List** form, select the Drywall item:

Job Section Edit
Job 1, Mountain View
Name: Basement walls
☒ Auto Calc Area ☒ Auto Calc Vol.
Length(x): 80
Height(y):
Area = 0
Depth(z):
Vol = 0
Back New **Summary** Items List Section Note Sections List Job Form Jobs List

Job Items List
Job 1, Mountain View
Dumpster, 4x8 small box 1
Drywall, 4x8 Sheets - installed & t. 1
Back New Show... GoTo... 2

Job Item Edit
Job 1, Mountain View
Name: Drywall
Description: 4x8 Sheets - installed &
Num. Units(#): 1
Material Unit Cost(\$): 6.95
Material Markup(%): 20
Service Unit Cost(\$): 32
Service Markup(%): 30
Back Details... New GoTo...

Note that we could have selected the **Back** button on the Job Sections form to go back to the Drywall item form. The only reason we didn't do that was to again emphasizing navigating through the form set using the **GoTo** button.

Now select the Details button:

Job Item Edit
Job 1, Mountain View
Name: Drywall
Details
☒ Billable ☒ Whole Units ☐ Lot
SST ☐ Material Only
Tax2 ☐ Both
Material Waste Factor(%): 0
Qty Dependency ☐ None
Done

Make the item quantity dependent on the "Basement walls" section area using the **Qty Dependency** control to select **Section Area**:

The first screenshot shows the 'Job Item Edit' form for 'Job 1, Mountain View' with item name 'Drywall'. In the 'Details' section, 'Billable' and 'Whole Units' are checked. The 'Qty Dependency' dropdown is open, showing options: 'None', 'Section Area', 'Section Volume', and 'Section Length'. 'Section Area' is selected. The second screenshot shows the same form, but the 'Section' dropdown is open, showing 'Basement walls' as the selected option. The 'GoTo Section' button is visible at the bottom.

Note that the dependent section defaults to "Basement walls", the first and only section that we have defined. However, the dependency ratio defaults to 1 / 1 (1 drywall sheet per 1 Sq. Ft. of wall area) which is not true. To complete the dependency, set the **Qty Ratio** to 1 / 32 (1 sheet or unit per 32 Sq. Ft. of wall area):

This screenshot shows the 'Job Item Edit' form with 'Qty Ratio' set to '1 / 32' and 'Section' set to 'Basement walls'. The 'GoTo Section' button is visible at the bottom.

Set the tax to apply to both material and labor and set the *Material Waste Factor* to 10%, then select the **Done** button to return to the main item form:

The first screenshot shows 'Tax2' set to 'Both' and 'Material Waste Factor' set to 10%. The second screenshot shows the 'Material Waste Factor' set to 10%. The third screenshot shows the 'Num. Units' calculated as 18.75. The 'GoTo Section' button is visible at the bottom of the first two screenshots, and the 'Back' button is visible at the bottom of the third screenshot.

The Item form always shows the nominal quantity. Note that the quantity can no longer be edited directly since we have specified that the item is dependent on a **Job Section**. The quantity will be updated automatically when a change is made to the section on which it is dependent. The unit quantity is now 18.75 sheets. This is the nominal quantity calculated by dividing the wall area by the square area of a sheet of drywall.

To see the total quantity for this dependent item, select the Num Units label – it is actually a selector button.

The screenshot shows the 'Job Item Edit' form for 'Job 1, Mountain View' with the item 'Drywall'. The description is '4x8 Sheets - installed &'. A 'Qty Info' dialog box is open, displaying the following values: 18.75 nominal, 1.875 waste, 20.625 total, and 21 whole units. The dialog has an 'OK' button. The background form has a 'Back' button at the bottom left.

The total quantity includes a 10% MWF all rounded up to the next whole number (21 sheets).

We now have a dry wall item (4x8 Ft. sheets). State Sales Tax (SST) will be applied to both material and service, a material waste factor of 10% will be applied to the nominal quantity specified or calculated and total quantities will be rounded up to a whole number. We could probably use this item in many jobs so it should really be added to the **Item Catalog**. We can quickly add the item to our Catalog via the Item menu (**Item AddTo Catalog**) as follows:

The first screenshot shows the 'Job Item Edit' form for 'Drywall' with the 'Item' menu open. The 'AddTo Catalog' option is highlighted. The second screenshot shows the 'Add To Catalog' dialog box. It has fields for 'Category' (set to 'Unfiled'), 'Catalog Item Name' (set to 'Drywall'), and 'Catalog Item Description' (set to '4x8 Sheets - installed & taped'). There are 'OK' and 'Cancel' buttons at the bottom.

While we are at it, we might as well add our other job item to the catalog as well. Select the form scroll arrow at the bottom right of the Item form to switch to our Dumpster job item. Add that item to the catalog.

The first screenshot shows the 'Job Item Edit' form for 'Job 1, Mountain View' with the item 'Dumpster'. The description is '4x8 small box'. The 'Num. Units(#)' is set to 1. The second screenshot shows the 'Job Item Edit' form with the 'Item' menu open and 'AddTo Catalog' highlighted. The third screenshot shows the 'Add To Catalog' dialog box for 'Dumpster', with 'Category' set to 'Unfiled', 'Catalog Item Name' set to 'Dumpster', and 'Catalog Item Description' set to '4x8 small box'. There are 'OK' and 'Cancel' buttons at the bottom.

Let's add one last item to our first client job. We will be adding four new electrical outlets (receptacles) during the renovation. Select the **New** button

This time we had two items in the Catalog to choose from. However, neither is one that we want so, select the **Blank Item** button to create another job item from scratch.

Once again, we quickly modify the new item to meet our needs. We are using the virtual keyboard for entering larger amounts of text because it suits our hunt and peck typing skills.

Job Item Edit

Job 1,Mountain View

Name:110V Outlet

Details

☒ Billable
☒ Whole Units
☐ Lot

SST ▾ Both

Tax:2 ▾ N/A

Material Waste Factor(%): 0

Qty Dependency ▾ None

Done

Job Item Edit

Job 1,Mountain View

Name:110V Outlet

Description:duplex recptacle -

Num. Units(#): 4

Material Unit Cost(\$): 15

Material Markup(%): 20

Service Unit Cost(\$): 30

Service Markup(%): 50

Back Details... New GoTo...

Add the Outlets item to the **Item Catalog** for future use:

Job Item Edit

Job 1,Mountain View

Name:110V Outlet

Add To Catalog

Category: ▾ Unfiled

Catalog Item Name:

110V Outlet

Catalog Item Description:

duplex recptacle - installed & wired

OK Cancel

At this time, take a moment to explore the **item scroll** buttons at the bottom right of the Item form. You will see that they scroll through the items in the current job.

Job Item Edit

Job 1,Mountain View

Name:110V Outlet

Description:duplex recptacle -

Num. Units(#): 4

Material Unit Cost(\$): 15

Material Markup(%): 20

Service Unit Cost(\$): 30

Service Markup(%): 50

Back Details... New GoTo...

Job Item Edit

Job 1,Mountain View

Name:Dumpster

Description:4x8 small box

Num. Units(#): 1

Material Unit Cost(\$): 0.00

Material Markup(%): 0

Service Unit Cost(\$): 115.00

Service Markup(%): 0

Back Details... New GoTo...

Job Item Edit

Job 1,Mountain View

Name:Drywall

Description:4x8 Sheets - installed &

Num. Units(#): 18.75

Material Unit Cost(\$): 6.95

Material Markup(%): 20

Service Unit Cost(\$): 32.00

Service Markup(%): 30

Back Details... New GoTo...

Now let's navigate to the main **Job** form for this client job. Select the **GoTo** button and then select **Job Form** from the popup list:

Job Item Edit

Job 1,Mountain View

Name:Drywall

Description:4x8 Sheets - installed &

Num. Units(#): 18.75

Material Unit Cost(\$):

Material Markup(%):

Service Unit Cost(\$):

Service Markup(%):

Summary

Quote

Item Note

Items List

Sections List

Job Form

Jobs List

Back Details... New

Job Edit

▾ Unfiled

Name: Job 1

Street:

City: Mountain View

State: CA

Zip: 654123

Country: USA

Phone: (415)555-5555

Email:

Quote #: 1002

Invoice #:

Status: ▾ Estimated

Items: 3

Back Details... Add GoTo...

Note that the **Job** form now shows three items associated with the job in the lower right of the form.

Tip: selecting the number of items with the stylus is a shortcut method of calling up the **Items list** form.

Selecting the **Back** button will return to the previous form which was the **Item** form. Note that the **Back** button will not toggle between the Item forms or any two forms of the same type. That is what the scroll arrows are for in the bottom right of the **Item** and **Job** forms. Select the **Back** button a couple of times:

The first screenshot shows the 'Job Edit' form with fields for Name (Job1), Street, City (Mountain View), State (CA), Zip (654123), Country (USA), Phone ((415)555-5555), Email, Quote # (1002), Invoice #, Status (Estimated), and Items (3). The bottom buttons are Back, Details..., Add, and GoTo... with scroll arrows.

The second screenshot shows the 'Job Item Edit' form for 'Job1.Mountain View'. It has fields for Name (Drywall), Description (4x8 Sheets - installed &), Num. Units (#) (18.75), Material Unit Cost (\$) (6.95), Material Markup (%) (20), Service Unit Cost (\$) (32.00), and Service Markup (%) (30). The bottom buttons are Back, Details..., New, and GoTo... with scroll arrows.

The third screenshot shows the 'Job Edit' form again, identical to the first, with the same fields and bottom buttons.

Selecting the **Back** button allows us to ping pong between the two most recent form types. To invoke a form other than the two most recent forms – Job and Item form in this case – select the **GoTo** button.

The screenshot shows the 'Job Edit' form with the 'GoTo' button selected, opening a menu with the following options: Summary, Quote, Items List, Section List, Job Note, and Jobs List. The bottom buttons are Back, Details..., Add, and GoTo... with scroll arrows.

All of the forms listed in the **GoTo** list are associated with the current job we are working on, except for the **Jobs List** entry. Selecting the Jobs List form will return us to the main **QuoteNerd Jobs** form. Let's briefly take a look at the other forms associated with the job.

The **Job Note** form is fairly self explanatory. A small memo of up to 4000 characters can be added to each job:

Job Note

Job1,Mountain View

Basement - only 8x4 drywall will fit down the stairs.

Done Delete...

The **Items List** lists the items associated with the current job:

Job Items List

Job1,Mountain View

Dumpster, 4x8 small box 1

Drywall, 4x8 Sheets - installed &... 21

110V Outlet, duplex receptacle - in... 4

Back New Show... GoTo... 3

Select any item in the list to edit the item. From the **Item** form, select the **Back** button to return to the **Item List**.

Now that we have added some items to the job, we should have a look at the **Summary** and **Quote** forms. The **Summary** form is your report of the job details. This form shows a breakdown of costs, mark ups and totals for the job. The **Quote** form is the client report of the job details; that is the job details as they would be quoted to your customer. Use the **GoTo** button to go to the **Summary** form for the job:

Job Items List

Job1,Mountain View

Dumpster, 4x8 small box 1

Drywall, 4x8 Sheets - installed &... 21

110V Outlet, duplex receptacle - in... 4

Back New Show... GoTo... 3

Job Items List

Job1,Mountain View

Dumpster, 4x8 small box 1

Drywall, 4x8 Sheets - installed &... 21

110V Outlet, duplex receptacle - in... 4

Back New Show... GoTo... 3

- Summary
- Quote
- Sections List
- Job Note
- Job Form
- Jobs List

Job Summary View

Job1,Mountain View

Material Line Item Costs

Dumpster, 4x8 sma...	1@0.00	0.00
Drywall, 4x8 Sheets..	21@6.95	145.95
110V Outlet, duplex..	4@15.00	60.00

Material Totals

Matl Cost:	205.95
Matl Markup:	41.19
Matl Charge:	247.14

Back Show... GoTo...

Both the **Summary** and **Quote** forms are “print outs” of the job details. You can scroll through the information of the **Summary** form to review the figures. Use the up/down arrows in the lower right corner of the form, to scroll one line at a time. Use the handheld’s up/down buttons or jog control to scroll one screen of information at a time. Use the **View** menu to quickly scroll to the top, middle or bottom line of the report.

The first screenshot shows the **View Options** menu with options: Start Of Summary, Middle Of Summary, End Of Summary, Items Catalog, and Job Templates. Below are material totals: Matl Cost: 205.95, Matl Markup: 41.19, Matl Charge: 247.14.

The second screenshot shows the **Job Summary View** for Job 1, Mountain View. It displays Service Totals: Serv Costs: 843.00, Serv Markup: 242.40, Serv Charge: 1085.40, Serv SST: 48.84, Serv Total: \$1134.24, and Serv Gross=\$242.40, GM=22.3%.

The third screenshot shows the **Job Summary View** for Job 1, Mountain View. It displays Job Totals: Job Costs: 1048.95, Job Markup: 283.59, Job Charges: 1332.54, Job SST: 59.96, Job Total: \$1392.50, and Job Gross=\$283.59, GM=21.3%.

The amount and manner in which information is displayed can be controlled with the **Options Dialog**. Select the **Show** button to display the Options dialog:

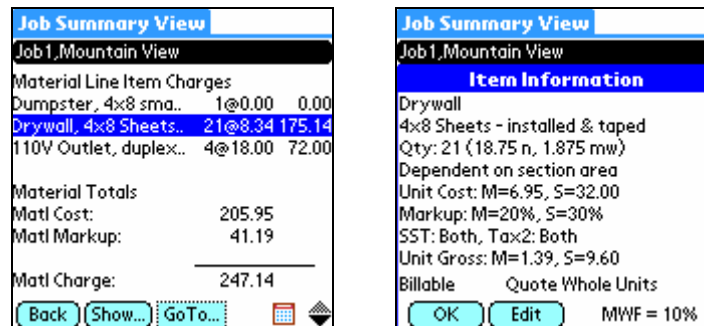
The first screenshot shows the **Summary View Options** dialog. It has checkboxes for 'Show itemized Materials' and 'Show itemized Service', both of which are checked. Below each checkbox are buttons for 'Cost', 'Markup', and 'Charge'. There is also a 'Hide Non-Billables' checkbox which is unchecked. At the bottom are 'OK' and 'Cancel' buttons.

The second screenshot shows the **Summary View Options** dialog, identical to the first.

The third screenshot shows the **Job Summary View** for Job 1, Mountain View. It displays Material Line Item Charges: Dumpster, 4x8 sma.. 1@0.00 0.00, Drywall, 4x8 Sheets.. 21@8.34 175.14, 110V Outlet, duplex.. 4@18.00 72.00. Below are Material Totals: Matl Cost: 205.95, Matl Markup: 41.19, Matl Charge: 247.14.

The fourth screenshot shows the **Job Summary View** for Job 1, Mountain View. It displays Service Line Item Markups: Dumpster, 4x8 sma.. 1@0.00 0.00, Drywall, 4x8 Sheets.. 19@9.60 182.40, 110V Outlet, duplex.. 4@15.00 60.00. Below are Service Totals: Serv Costs: 843.00, Serv Markup: 242.40.

Double clicking on a material or service line item will invoke the **Summary Item Information** dialog which shows more detailed summary information for the item and allows the item to be edited as well.



Note the total quantity for our drywall item after adding a Material Waste Factor (MWF) of 10% and specifying that the item be quoted in whole units. Also, note that the service charges are based on the item quantity excluding any calculated material waste quantities.

The **Quote** form is the customer or public view of the job details. All material and service charges include mark-ups. There are still a number of different ways in which the quote/invoice information can be shown. Here are views of the Summary and Quote forms shown side by side for comparison:

Job Summary View		Job Quote View	
Job 1, Mountain View		Job 1, Mountain View	
Material Line Item Charges		Material Line Item Charges	
Dumpster, 4x8 sma..	1@0.00 0.00	Drywall, 4x8 Sheets..	21@8.34 175.14
Drywall, 4x8 Sheets..	21@8.34 175.14	110V Outlet, duplex..	4@18.00 72.00
110V Outlet, duplex..	4@18.00 72.00		
Material Totals		Materials Totals	
Matl Cost:	205.95	Matl Charges:	247.14
Matl Markup:	41.19	Matl SST:	11.12
Matl Charge:	247.14	Matl Total:	\$258.26
Back Show... GoTo...		Back Show... Print GoTo...	

There are a couple of interesting points to note. The **Summary** shows a zero cost Dumpster item, in the material line items list, while the **Quote** does not. That is because the **Summary** options are not set to hide non-billables. **Summary** considers zero cost items to be non-billable. This is configurable (use the **Summary Show** options button) and can be used to check for missed values. The **Quote** doesn't show zero cost items at all although it can be configured (**Show** options button) to show non-billable items that are not zero cost items.

The Quote form allows the pricing information to be shown and printed in a number of ways via the **Show** button.

Job Quote View		Job Quote View	
Job 1, Mountain View		Job 1, Mountain View	
Material Line Item Charges		Material Line Item Charges	
Drywall, 4x8 Sheets..		21@8.34 175.14	
110V Outlet, duplex..		4@18.00 72.00	
Materials Totals		Materials Totals	
Matl Charges:		247.14	
Matl SST:		11.12	
Matl Total:		\$258.26	
Quote View Options		Back Show... Print GoTo...	
<input type="checkbox"/> Show Combined Matl & Serv. <input checked="" type="checkbox"/> Show Matl. & Service summaries <input checked="" type="checkbox"/> Show itemized Materials <input checked="" type="checkbox"/> Show itemized Service <input checked="" type="checkbox"/> Hide Non-Billables			
OK Cancel			

Material and service charges can be blended into a combined charge instead of reporting them separately.

Job Quote View

Job 1, Mountain View

Quote View Options

☒ Show Combined Matl & Serv.

☐ Show Matl. & Service summaries

☒ Show itemized Materials

☒ Show itemized Service

☒ Hide Non-Billables

OK Cancel

Job Quote View

Job 1, Mountain View

Job Line Item Charges

Dumpster, 4x8 sma..	1@115.00	115.00
Drywall, 4x8 Sheets..	21@45.98	965.54
110V Outlet, duplex..	4@63.00	252.00

Job Totals

Job Charges: 1332.54

Job SST: 59.96

Job Total: \$1392.50

Back Show... Print GoTo...

Further options are provided for formatting a printed quote or invoice via the Quote Options Menu:

View Options

Job 1, Mo

Service L

Dumpste

Drywall, 4

110V Out

15.00

90.40

80.00

Service Totals

Serv Charges: 1085.40

Serv SST: 48.84

Serv Total: \$1134.24

Back Show... Print GoTo...

Job Quote View

Print Options

Copies: 1 Extra Top Margin: 0

Include: ☒ Signature Line

☒ Footer ☒ Payment Options

Service Label:

Service

Footer Text:

OK Cancel

Job Quote View

Print Options

Copies: 1 Extra Top Margin: 0

Include: ☒ Signature Line

☒ Footer ☒ Payment Options

Service Label:

Labor

Footer Text:

Thank you for your business!

OK Cancel

The Extra Top Margin option is for adding additional margin lines at the top of each page to support a company Letterhead or logo.

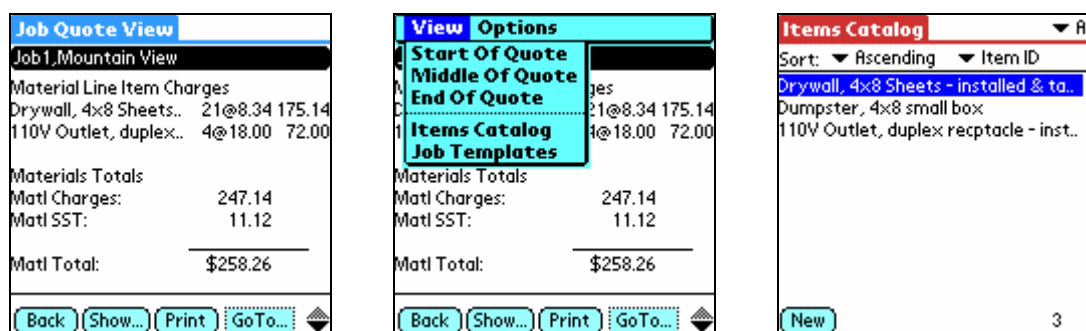
The Service Label is the text label to be printed for service items. The term "Labor" or "Installation" may be a more appropriate label for service charges in many business quotes and invoices. Changes made to the **Printing** options only affect the printed output unlike the **Show** button options which affect both the display and the printed output.

This concludes the introduction to the **Client Jobs View**. The next section will explore the **Items Catalog View**.

Managing the Items Catalog

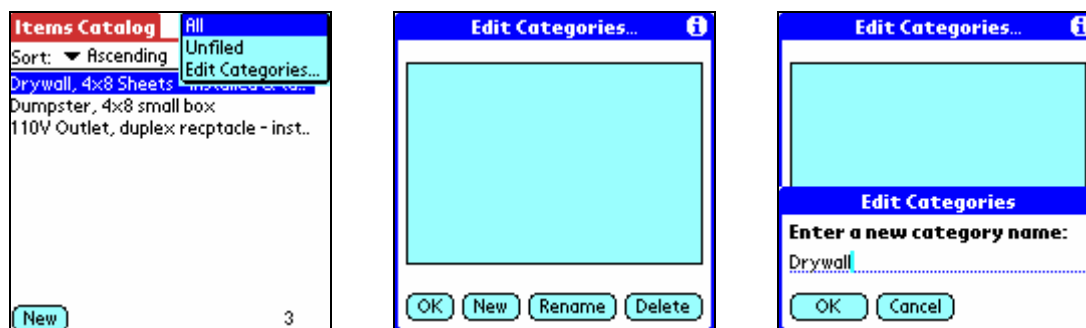
Managing the Items Catalog is very easy. There are two major forms in the Items Catalog form set; the **Items list** form and the **Catalog Item** form. The **Catalog item** form is essentially the same as the item form in the Client Jobs view as well as the Job Templates view. New Blank items can be added to the Catalog in the **Catalog Items list** and in the **Catalog Item** form. Preconfigured items can be added to the Catalog from an existing Client job or even a Job Template as demonstrated earlier. The Items Catalog supports organizing items in as many as 15 user defined categories. In addition, a note of up to 4000 characters in length can be attached to each item in the Catalog. The categories and notes are features common to all jobs, templates and items in all views.

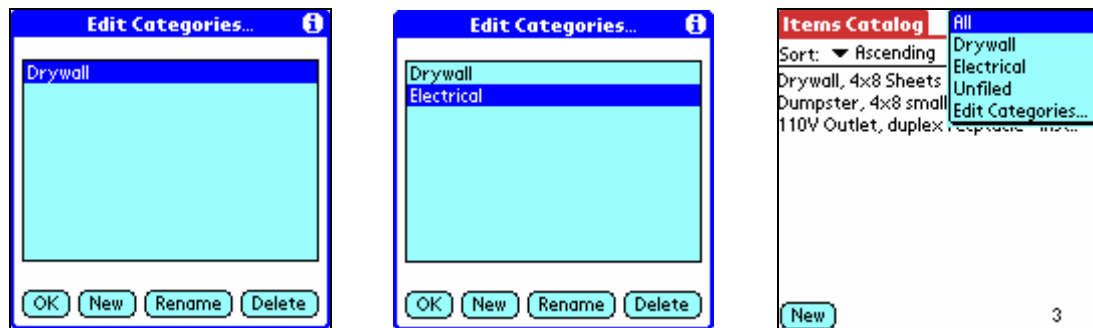
Select the **Items Catalog** view, from any main form in the **Client** or **Templates** view, by selecting **View Items Catalog** from the menu:



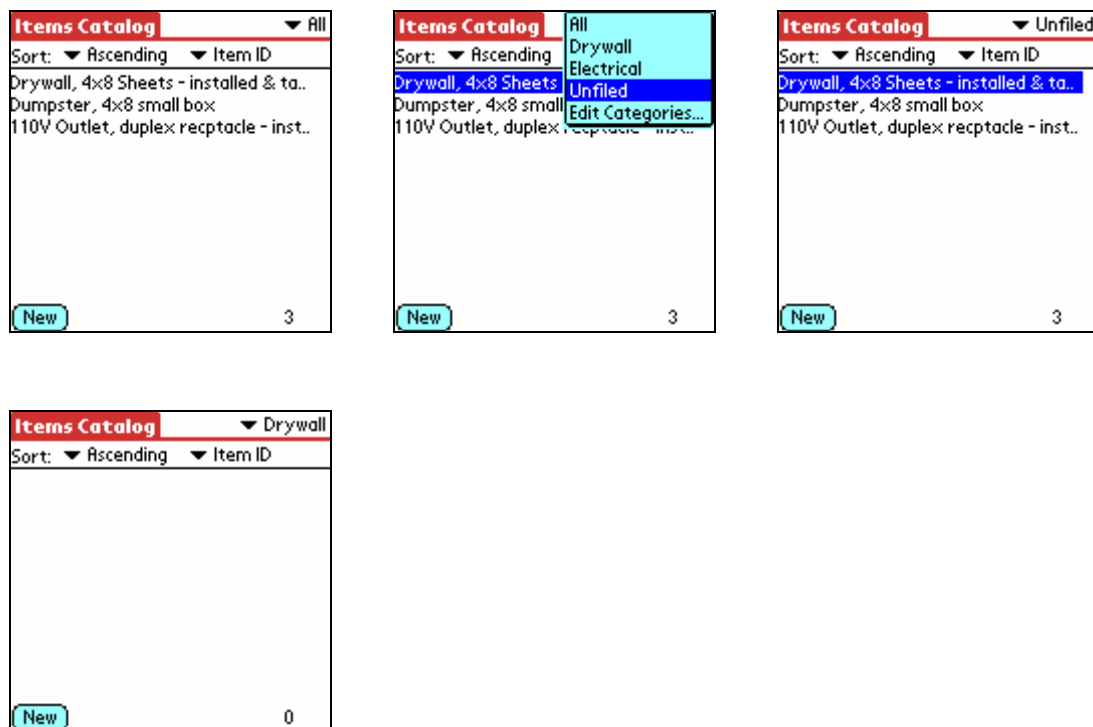
Creating Item Categories

Creating Item categories is the same as creating categories in any of the standard Palm applications. This applies to the **Client Jobs** and **Job Templates** views as well. Select the category popup in the upper right corner of the Items Catalog list form. Select **Edit Categories** and then **New** to create a new category. We will create two categories for the types of items we have added to the Catalog thus far.





Since we did not assign our items to a category when we added them to the Catalog - we didn't have any categories defined at the time - our sample items are in the default "Unfiled" category. These items will only be displayed in the list of Catalog items if we have selected to display All categories or the Unfiled category in the **Items Catalog** form.



Note that QuoteNerd displays the total number of items in the category being displayed, in the lower right of the form.

Assigning Items to a Category

To assign an existing item to a category, edit the item by selecting the item from the list. We select the drywall item first. The Item Edit form displays the item's category in the upper right corner. To assign the item to a different category, select the desired category from the category popup control.

The first screenshot shows the 'Items Catalog' window with the 'Drywall, 4x8 Sheets - installed & ta...' item selected. The second screenshot shows the 'Catalog Item Edit' window for the selected item, with the category dropdown set to 'Drywall'. The third screenshot shows the same 'Catalog Item Edit' window, but the category dropdown is now set to 'Electrical'.

Change the category of the Drywall item to Drywall and then select the Done button to return to the Items Catalog form.

The first screenshot shows the 'Catalog Item Edit' window with the category dropdown set to 'Drywall'. The second screenshot shows the same window after the 'Done' button has been clicked, returning to the 'Items Catalog' window.

Now when we review the Items Catalog by category we see the following:

The first screenshot shows the 'Items Catalog' window with the 'Drywall' category selected, displaying three items. The second screenshot shows the 'Items Catalog' window with the 'Electrical' category selected, displaying two items. The third screenshot shows the 'Items Catalog' window with the 'Drywall' category selected, displaying one item.

Change the category of the duplex receptacle to "Electrical".

If a new item is created in the **Catalog Items List** form, the item will be assigned to the category currently being displayed or to the **Unfiled** category if **All** item categories are being displayed. If a new item is created in the **Catalog Item** form, it will be assigned to the category of the currently displayed item. **This works exactly the same for categorizing Jobs in the Client Jobs and Job Templates view.**

There are a number of ways of creating new Catalog items. Items can be added to the catalog from existing **Client Jobs** or **Job Templates** as was demonstrated earlier. In addition, new blank items can be created using the **New** button in either the **Catalog List** form or the **Catalog Item** form. Another shortcut method is to duplicate an existing Item in the catalog and then just change the fields that differ in the new item. Below, we will duplicate our Drywall item to create a 3/8" thick drywall item. Each sheet is still 4'x8', so only the price per sheet and the name of the item needs to be changed.

The sequence of screenshots illustrates the process of creating a new catalog item by duplicating an existing one:

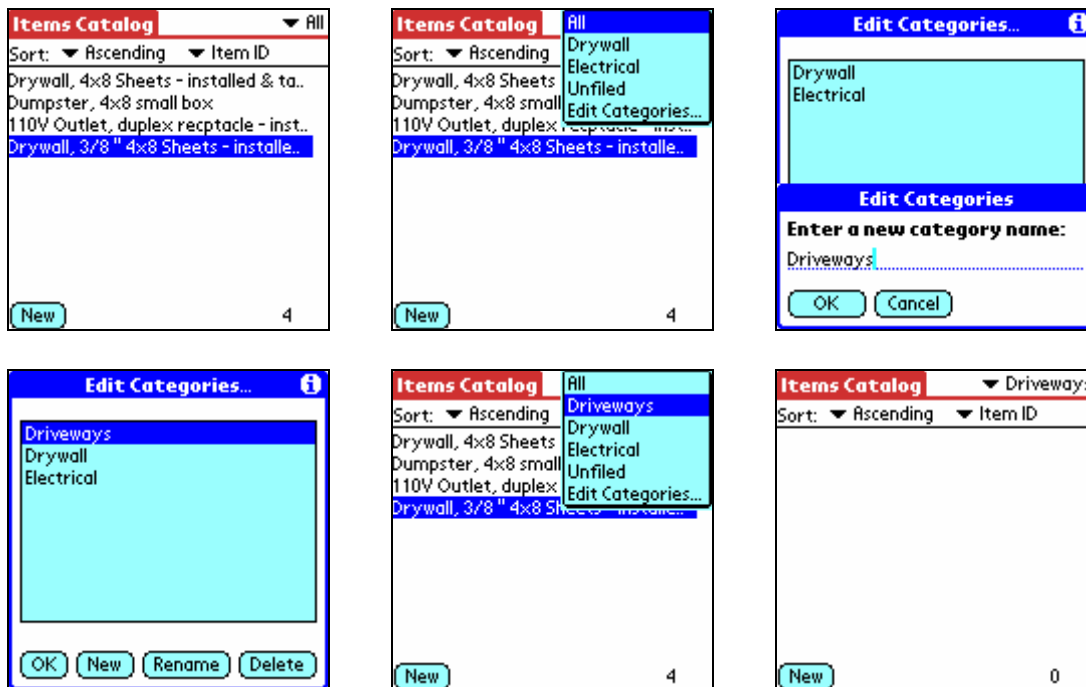
- Items Catalog:** Shows a list of items under the 'Drywall' category. The item 'Drywall, 4x8 Sheets - installed & ta..' is selected.
- Catalog Item Edit:** Shows the details for the selected item. Fields include Name (Drywall), Description (4x8 Sheets - installed & ta..), Num. Units (#) (0), Material Unit Cost (6.95), Material Markup (%) (20), Service Unit Cost (32.00), and Service Markup (%) (30).
- View Item Edit Options:** A context menu is open, showing options like 'Delete Item', 'Edit Note', 'Delete Note', 'Duplicate Item', and 'Beam Item'. The 'Duplicate Item' option is selected.
- Catalog Item Edit:** Shows the details for the newly created item, 'Copy-Drywall'. The fields are identical to the original item, but the Material Unit Cost is now 5.95.
- Catalog Item Edit:** Shows the details for the newly created item, 'Drywall'. The fields are identical to the original item, but the Material Unit Cost is now 5.95.
- Items Catalog:** Shows the updated list of items. The new item 'Drywall, 3/8" 4x8 Sheets - installed & ta..' is now visible in the list.

Dependent Items

Before proceeding any further, we must point out one major difference between defining items in the items Catalog versus the **Client Jobs** view. Item quantities can be defined based on length, area or volume (dependent item) or as specific values (independent item). In the **Client Jobs** view a dependent item must be linked to a Job Section that defines the length, area or volume used to calculate the item quantity. This is not the case for an item in the Item Catalog. The Item Catalog allows you to define a dependent item without defining a Job Section, since defining sections is job specific and items can be added to any number or type of job. When a dependent item is added to a client job from the catalog, the item will initially be linked to the first **Job Section** defined for the Job or a "dummy" **Job Section** will be created for the job if there are no Sections currently defined. This applies to adding items in the Job Templates view as well.

Since dependent items are such an important feature of **QuoteNerd Pro**, we will demonstrate another small example of creating and using dependent items. In this example we will define two items related to creating an interlock brick driveway. Both item quantities are dependent on the area of the driveway.

First create a Driveway category to hold related items:



Next, we create an item for laying a gravel base for the driveway. In our example we will lay a base that is 18 inches deep. We want to use this item to estimate the number of cubic yards of gravel required. So, our item quantity is the number of cubic yards of gravel. Select the **New** button to create a new item and then configure the item to our needs.

The first screenshot shows the 'Catalog Item Edit' dialog box with the following fields: Name: CatalogItem5, Description:, Num. Units(#): 1, Material Unit Cost: 0.00, Material Markup(%): 0, Service Unit Cost: 0.00, and Service Markup(%): 0. The second screenshot shows the same dialog box with the following fields: Name: 18" Gravel Base, Description: (Cu. Yards), Num. Units(#): 1, Material Unit Cost: 35.60, Material Markup(%): 0, Service Unit Cost: 0.00, and Service Markup(%): 0.

Note that "as is" the item's quantity is **independent** of length, area or volume. We could use the item as is by just adjusting the number of units – remember our unit quantity is a cubic yard - if we calculate the number of yards required. However, that is not what we want to do each time that we estimate a new driveway job requiring an 18" gravel base. We want to define the item's quantity dependency based on the square area of the driveway. Select the **Details** button and modify the item accordingly:

The four screenshots show the 'Details' tab of the 'Catalog Item Edit' dialog box. The first screenshot shows the 'Details' tab with 'Qty Dependency' set to 'None'. The second screenshot shows a dropdown menu for 'Qty Dependency' with options: 'Material Only', 'Service Only', and 'Both'. The third screenshot shows 'Qty Dependency' set to 'Section Area'. The fourth screenshot shows 'Qty Ratio' set to '1 / 18'.

The above is all very straight forward, except for the quantity ratio. Since we are defining a fixed depth gravel base, we can calculate the volume of gravel required per unit area. The alternative is to make the item dependent on section volume in which case the section depth would have to be specified for each job in which the item is used. In any case it is worthwhile to note how we determined the quantity ratio because it may not be obvious to

others - or even ourselves - in future. Select the **Done** button and then add a note to the item, describing the quantity ratio:

The first screenshot shows the 'Catalog Item Edit' window for '18" Gravel Base'. The description is '(Cu. Yards)'. The unit cost is 35.60. The second screenshot shows the 'Options' menu with 'Edit Note' selected. The third screenshot shows the 'Catalog Item Note' window with a note: '18" Gravel Base: (Cu. Yards) Volume quantity calculated based on area in Sq. Ft. 18" = 1.5 Ft. Cu.Ft. = area * 1.5 area = Cu.Ft. / 1.5 1 Cu.Yd. = 27 Cu.Ft. area = 27Cu.Ft. / 1.5 Qty ratio = 1 Cu.Yd. / 18 Sq.Ft. of driveway area'.

The next Driveway item that we want to define is for interlock brick. We buy the brick by the pallet or cube. Each pallet covers 103 Sq.Ft. of surface area so our qty ratio is 1 to 103. We will price the brick as a single lot rather than x number of pallets even though we calculate the quantity in pallets.

Here is the interlock brick item:

The first screenshot shows the 'Catalog Item Edit' window for 'Interlock Brick'. The description is 'Rectangular'. The unit cost is 200. The second screenshot shows the 'Details' window with 'Qty Ratio' set to 1 / 103. The third screenshot shows the 'Catalog Item Note' window with a note: 'Interlock Brick: Rectangular Quantity is in pallets, quoted as a single lot.'

We have not added mark ups or service (labor) charges per item to simplify this example. This would be quite easy to do if we have the values at hand. However, in this case we assume that the simple rough approach of one overall labor charge for the job based on the square area will suffice.

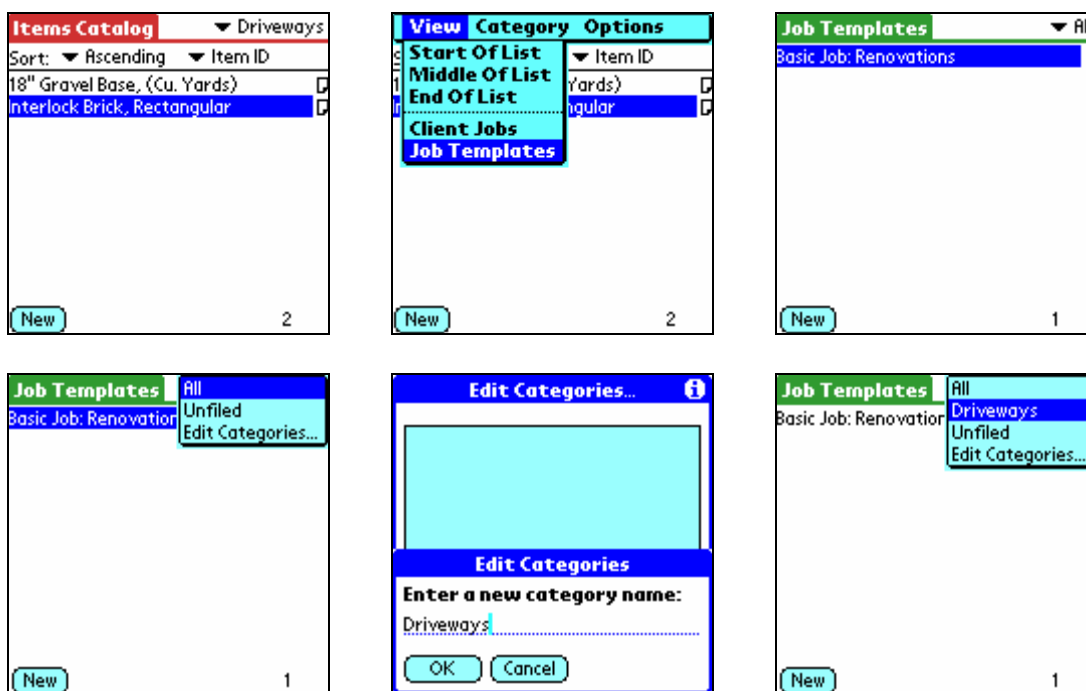
In this section, we introduced creating and maintaining the Item Catalog. Items in the catalog can be added to Client Jobs and to Job Templates. The next section will briefly revisit creating a Job Template to be used for creating **Client Jobs**.

Managing Job Templates

Managing Job Templates is similar to managing the **Items Catalog** and the **Client Jobs**. Templates are preconfigured Jobs including optional line items. The Templates can be organized in user defined categories and the template form set is similar to the Client Job form set. A note can be attached to each template job and to individual items in a Job Template.

Since we have covered **Client Jobs** and the **Items Catalog** and created a simple Job Template earlier (our Basic Job template), we will cover this section by briefly creating a template for driveway construction jobs. This example will use the items that we created in the previous section on Managing the Items Catalog.

Switch to the Job Templates view and create a new category for Driveway jobs:



Switch to the newly created Driveways category and then create a new job template.

The sequence of screenshots shows the process of creating a new job template. It starts with the 'Job Templates' screen, then moves to the 'Template Edit' screen where various fields are filled out. The 'Details' tab is then selected, showing additional fields like Discount(%), SST(%), Tax2(%), Currency, and Printing Date. The final screenshot shows the 'Template Edit' screen with the 'Details' tab selected, indicating the template is ready for use.

Now we need to add some typical driveway items to the new Interlock Job Template. We will add the items from the Item Catalog:

The sequence of screenshots shows the process of adding items to the 'Interlock' job template. It starts with the 'Template Edit' screen, then moves to the 'Template Items List' screen where the 'Interlock' template is selected. The 'Add Items' screen is then shown, displaying the 'Interlock' template and the 'Add Items' button. The final screenshot shows the 'Add Items' screen with the 'Interlock' template selected, indicating the items are ready to be added.

The **Add Items** dialog displays the contents of the Item Catalog. Select both of the driveway items and then select **OK**. After selecting OK, the QuoteNerd will add the selected items to the template and immediately switch to editing the first new item.

Observe the Item details dialog:

Template Item Edit *

Interlock

Name: 18" Gravel Base

Description: (Cu. Yards)

Num. Units(#): 1

Material Unit Cost(\$): 35.60

Material Markup(%): 0

Service Unit Cost(\$): 0.00

Service Markup(%): 0

Back Details... New GoTo...

Template Item Edit *

Interlock

Name: 18" Gravel Base

Details

☒ Billable ☒ Whole Units ☐ Lot

SST Material Only

Tax2 N/A

Material Waste Factor(%): 0

Qty Dependency Section Area

Qty Ratio: 1 / 18 Sq. Units

Done

The item is exactly as created in the Item Catalog. Similarly, our second item is as created in the Item Catalog and we now have 2 items in the template:

Template Item Edit *

Interlock

Name: Interlock Brick

Description: Rectangular

Num. Units(#): 0

Material Unit Cost(\$): 200.00

Material Markup(%): 0

Service Unit Cost(\$): 0.00

Service Markup(%): 0

Back Details... New GoTo...

Template Item Edit *

Interlock

Name: Interlock Brick

Details

☒ Billable ☒ Whole Units ☒ Lot

SST Material Only

Tax2 N/A

Material Waste Factor(%): 0

Qty Dependency Section Area

Qty Ratio: 1 / 103 Sq. Units

Done

Template Items List

Interlock

18" Gravel Base, (Cu. Yards) ☐

Interlock Brick, Rectangular ☐

Back New GoTo... 2

Note the star (asterisk) in the upper right of the item edit form. The star indicates that this template item is linked to, or associated with, an item in the Catalog. Template items that are linked to items in the Items Catalog have special characteristics:

- The template item's cost and markup values are automatically updated when the associated Catalog Item is modified. So, the latest Items Catalog costs and markups can be reflected in the template items and any Client Jobs created from the template will get the latest Items Catalog pricing.
- A linked template item's cost and markup values cannot be modified via the Template Item Edit form since this would defeat the whole purpose of linking the template and catalog items.
- If the Template Job is locked, the linked template items will NOT be updated when changes are made to an associated Catalog item.
- If a template item is added to the Items Catalog, the template item is automatically linked to the newly created Catalog item.

To view or modify the associated Catalog item, of a linked template item, select the star (it is actually a button). Selecting the star will open the Catalog Item Edit form for the associated Catalog item. Below is an example of selecting the star to go to the associated Catalog item, changing the item and then returning to our original template item:

A template item's link to the Items Catalog can be broken any time you wish. To unlink the template item select the **Item Unlink From Catalog** menu item as shown below:

The PC Companion application allows you to change the Catalog item that a template item is linked to as well as unlinking a template item from the Items Catalog. The handheld only supports unlinking of the template item from the Items Catalog.

What we need to do now is to create one or more client jobs based on this template. To do that, switch to the **Client Jobs** view and select this template when creating a new job from the **Jobs List** form (hint – After switching to the **Client Jobs** view you may have to GoTo the **Jobs List** form from whatever form you were last viewing in the **Client Jobs** view):


The screenshots illustrate the initial setup of a job in QuoteNerd Pro. The process starts with viewing the job list, adding a new job with specific details, editing the job information, and then adding items to the job. The final screenshot shows the detailed configuration for a job item, including setting a 'Dummy Section' for dependency.


Note that the section dependency has been set to "Dummy Section". A Dummy Section was created because the template item needs a section to calculate the item quantity. This job will only have one section which is the total driveway. The first thing that should be done with this new job is to edit the job section and change its name and enter the section dimensions if they are known. To quickly do that, select the **GoTo Section** button:

These two screenshots show the 'Job Section Edit' dialog. In the first, the section is named 'DummySection' and all dimensions (Length, Height, Depth) are zero, resulting in zero area and volume. In the second, the section name has been changed to 'Driveway', and dimensions have been entered: Length is 48, Height is 27, and Depth remains 0. This results in a calculated Area of 1296 and Volume of 0.


Select the back button to return to the **Job Item Edit** form (back to the previous main form) and then review the changes in the **Job Item Details** dialog. Note that the number


of units (cubic yards for this item) are automatically calculated and we will be recalculated if the dimensions of the section are changed.

Job Item Edit	
Customer A: A St.,Mountain View	
Name:18" Gravel Base	
Description:(Cu. Yards)	
	Num. Units(#): 72
Material Unit Cost(\$): 35.60	
Material Markup(%): 0	
Service Unit Cost(\$): 0.00	
Service Markup(%): 0	
Back	Details... (New) GoTo...

Job Item Edit	
Customer A: A St.,Mountain View	
Name:18" Gravel Base	
Details	
<input checked="" type="checkbox"/> Billable	<input checked="" type="checkbox"/> Whole Units <input type="checkbox"/> Lot
SST ▼ Material Only	
Tax2 ▼ N/A	
Material Waste Factor(%): 0	
Qty Dependency ▼ Section Area	
Qty Ratio: 1 / 18 Sq. Units	
Section: Driveway	
Done	GoTo Section 

Observe that the Interlock brick item also refers to the one and only section for the job:

Job Item Edit	
Customer A: A St.,Mountain View	
Name:Interlock Brick	
Description:Rectangular	
	Num. Units(#): 12.583
Material Unit Cost(\$): 200.00	
Material Markup(%): 0	
Service Unit Cost(\$): 0.00	
Service Markup(%): 0	
Back	Details... (New) GoTo...

Job Item Edit	
Customer A: A St.,Mountain View	
Name:Interlock Brick	
Details	
<input checked="" type="checkbox"/> Billable	<input checked="" type="checkbox"/> Whole Units <input checked="" type="checkbox"/> Lot
SST ▼ Material Only	
Tax2 ▼ N/A	
Material Waste Factor(%): 0	
Qty Dependency ▼ Section Area	
Qty Ratio: 1 / 103 Sq. Units	
Section: Driveway	
Done	GoTo Section 

Now that we have the Interlock driveway template, it is easy to quickly create a new job containing the common Interlock driveway items. Additional items and sections can be added to the job as required.

Handheld Tips & Shortcuts

- Use the Up/Down scroll arrows (bottom right of form) to scroll lists one line at a time. Use the Up/Down hardware buttons or jog control to scroll a list one page at a time.
- Associate the QuoteNerd application with one of the hardware buttons This can be done from standardPalm Prefs application. Once this is done, you can launch the QuoteNerd with the touch of a button. The button can also be used to cycle through categories in a list as well as scrolling to next job, item or section in the respective edit forms.
- Select the number of items in a Job form to display the job's item list. The item list can also be displayed using the Job form's **GoTo** button.
- Clicking twice (selecting twice with the stylus) on a line item in a Client Job Summary or Quote form will display an **Item Information** dialog giving more detailed information on the line item. The item can be edited from the Item Information dialog if displayed while in the Summary form but not if displayed from the Quote form (we don't want to accidentally show our private information to the customer...).
- When cycling through jobs in a **Job** form, you only see jobs that match the current job list display category. This is true even if you change the category of the current job in the **Job** form.
- Changing the status of a job will lock the job data. The lock state can be overridden via the Job menu item in the **Job** form. A locked state is indicated in the title bar.
- Select the right most column in a job or item list to add, edit or review an attached note.
- When adding an item to a job, you can select a Catalog item's note icon to view the note associated with it prior to adding it to the job.
- Multiple items can be added, at the same time, from the Items Catalog to a Client Job or a Job Template. Select each item you wish to add to the job, with the stylus, and then select the **OK** button.
- Items can be selected from multiple Catalog categories in the Add Items dialog. Review all items selected in all categories by changing the display category to All. Selected items will be highlighted.
- When creating a new job, you can view a note attached to a Job Template in the list by selecting the note icon in the rightmost column.
- In forms containing a calculator dialog icon, selecting an editable numeric value field and then selecting the calculator icon will cause the calculator to import the selected value and give you the option of returning your calculated result to the selected field via the **RetVal** button.

- The calculator dialog can be invoked from the **Options** menu or by using the command toolbar (use the **command stroke** - a diagonal line from lower left to upper right - to view the command toolbar then tap on the Calculator icon. Some models have a command stroke key that performs similar function).
- In the Client Item edit form, the nominal (calculated or specified) number of items is displayed. Select the **Num. Units(#)** selector to get a quick breakdown of the total number of units that will be used in a quote, including any waste factor and rounding to next whole number if applicable.
- The currency selector in the Job form, selects the **currency symbol** to be used for the job. It does not convert values from one currency to another since that would require an up to date currency exchange rate table.

QuoteNerd Pro Pc Companion Application

Introduction

The QuoteNerd PC Companion Application (**Companion**) is a Windows desktop application that compliments the QuoteNerd Pro handheld application. The Companion supports most of the features of the handheld application and. There are a few exceptions to this rule:

- The Companion does not support registering the software. Registration must be done on the handheld.
- The Companion does not support altering the QuoteNerd Pro company information or general application preferences for the handheld. It does however; use this information from the handheld.
- The Companion supports managing archived Jobs as well as importing and exporting Item Catalog information from and to text files. These features are described in more detail later in this guide.
- The Companion supports multiple handhelds.

In general, the Companion looks and operates very similarly to the handheld application. There are some differences such as the lack of dialog forms where the dialog information can be fitted on the same form as the main data (eg. The item Details dialog). The Companion also presents the Summary and Quote data in a more tabular form suitable for a desktop application. Below are some screen shots from the Companion:

QuoteNerd Pro PC Companion

File View Help

Palm User: UserDoc

Catalog Items List
Display Category: All

Sort Order: Ascending
Sort Criteria: Item ID

Item	Item ID	Note
Drywall: 4x8 Sheets - installed ...	1	
Dumpster: 4x8 small box	2	
110V Outlet: duplex recptacle - ...	3	
Drywall: 3/8 " 4x8 Sheets - inst...	4	
18" Gravel Base: (Cu. Yards)	5	Volume quantity calculated bas...
Interlock Brick: Rectangular	6	Quantity is in pallets, quoted a...
Whilybird	7	
Sparklers: 14"	8	
Family pack	9	

New
9

QuoteNerd Pro PC Companion

File View Help

Palm User: **UserDoc**

Client Item Edit

Job1,Mountain View,Renovations

Name: Drywall

Description: 4x8 Sheets - installed & taped

Nominal Quantity(#): 18.75

Material Unit Cost(\$): 6.95

Material Markup(%): 20

Service Unit Cost(\$): 32.00

Service Markup(%): 30

Material Waste Factor(%): 10

☒ Billable ☒ Quote Whole Unit Quantities ☐ Quote as Single Lot

SST Applied: On Both

Tax2 Applied: On Both

Quantity Dependency Type: Section Area

Unit Quantity Ratio (1 per) 32 Sq. Units

Section (dependency): Basement walls

Back New Duplicate Note Delete AddTo Catalog Go To Form

QuoteNerd Pro PC Companion [Window Controls]

File View Help

Palm User:

Quote for Job1:Renovations

Material Items

Item	Qty	Unit Price	Quantity Price
Drywall: 4x8 Sheets - i...	21	8.34	175.14
110V Outlet: duplex re...	4	18.00	72.00

Service Items

Item	Qty	Unit Price	Quantity Price
Dumpster: 4x8 small box	1	115.00	115.00
Drywall: 4x8 Sheets - i...	19	41.60	790.40
110V Outlet: duplex re...	4	45.00	180.00

Totals

	Price	Discount	Sub-Total	SST	Tax2	Total Amount
Material	247.14	0.00	247.14	11.12	0.00	258.26
Service	1085.40	0.00	1085.40	48.84	0.00	1134.24
Job Totals	1332.54	0.00	1332.54	59.96	0.00	1392.50

Archived Jobs

The Companion has an **Archived Jobs** view in addition to the **Items Catalog**, **Client Jobs** and **Template Jobs** views. When a Job is deleted on the handheld or PC, there is an option to save an archive copy on the PC. The **Archived Jobs** view provides a means to manage these jobs.

Archived jobs can be viewed and printed just like regular Client jobs. However, the data for an archived job cannot be changed. An archived job can be added to the **Job Templates** and items from an archived job can be added to the **Items Catalog**.

Importing and Exporting Catalog Items

The Companion supports exporting (saving) and importing (loading) catalog items from text files. This means that data can be exchanged between the **QuoteNerd Pro** application and other **Windows** applications as well as other QuoteNerd Pro users. The Companion uses tab delimited text files for importing and exporting. Tab delimited text files are compatible with **Microsoft Excel**, **Microsoft Access** and a host of other desktop applications.

Select the Companion menu item **File Import/Export** to import or export catalog item data.

Exporting Catalog Items

Items can be exported on a per category basis. The items in one or more categories can be exported to the same text file. The companion automatically names the export text file based on the current desktop date and time.

In general, record columns (aka fields) fall into two types - attribute and data. Attribute columns are restricted to specific values. Because attributes have restricted values, the values can be specified using predefined text labels or numbers (numeric values). Data columns contain variable user data such as numbers or text.

Attribute column names begin with the prefix "**Attr:**" making it easy to identify the type of the column.

The Export columns are defined below in the order in which they are exported to the export data file. Import data files need not follow this column order although there are a few caveats to this as mentioned below.

Data Columns

Column itemID:

Integer value, QuoteNerd generated number that uniquely identifies an existing record in the Item Catalog. A value of 0 is interpreted as a new record

when importing records. QuoteNerd will assign a valid itemID to each new record it creates.

If the itemID column exists in an import data file, QuoteNerd PC assumes that any value other than 0 refers to an existing record.

If the itemID column is the first column in the data file, QuoteNerd PC will apply any further specified column values against the existing record effectively editing only those columns of the existing record. In this case only the columns to be modified need appear in the import data file.

If the itemID is not the first column in the data file, then QuoteNerd PC will update the existing record with the column values supplied and assign default values to all columns not supplied.

Column Attr:category

Each category has a unique numeric index value as well as a text value. The text value is the category name seen in the QuoteNerd application on the handheld or PC. Although this is an attribute column, it is slightly different than other attribute columns in that the text and associated numeric value can change as the user modifies the Catalog Item categories. Example values are:

Text: "Driveways", Value: 3
Text: "Drywall", Value: 1
Text: "Electrical", Value: 2
Text: "Fireworks", Value: 4
Text: "Unfiled", Value: 0

Column Attr:billable

Text: "true" or "yes", Value: 1
Text: "false" or "no", Value: 0

Column Attr:dependency

Text: "None", Value: 0
Text: "Area", Value: 1
Text: "Volume", Value: 2
Text: "Length", Value: 3

Column Attr:quoteWholeUnits

Text: "true" or "yes", Value: 1
Text: "false" or "no", Value: 0

Column Attr:applyTax1

Text: "None",	Value: 0
Text: "Material",	Value: 1
Text: "Service",	Value: 2
Text: "Both",	Value: 3

Column Attr:applyTax2

Text: "None",	Value: 0
Text: "Material",	Value: 1
Text: "Service",	Value: 2
Text: "Both",	Value: 3

Column Attr:quoteLot

Text: "true" or "yes",	Value: 1
Text: "false" or "no",	Value: 0

Column numUnits

Decimal value.

Column matlUnitCost

Decimal value.

Column matlMarkup

Decimal value.

Column servUnitCost

Decimal value.

Column servMarkup

Decimal value.

Column wasteFactor

Decimal value.

Column dependencyRatio

Decimal value.

Column name

Text value.

Column description

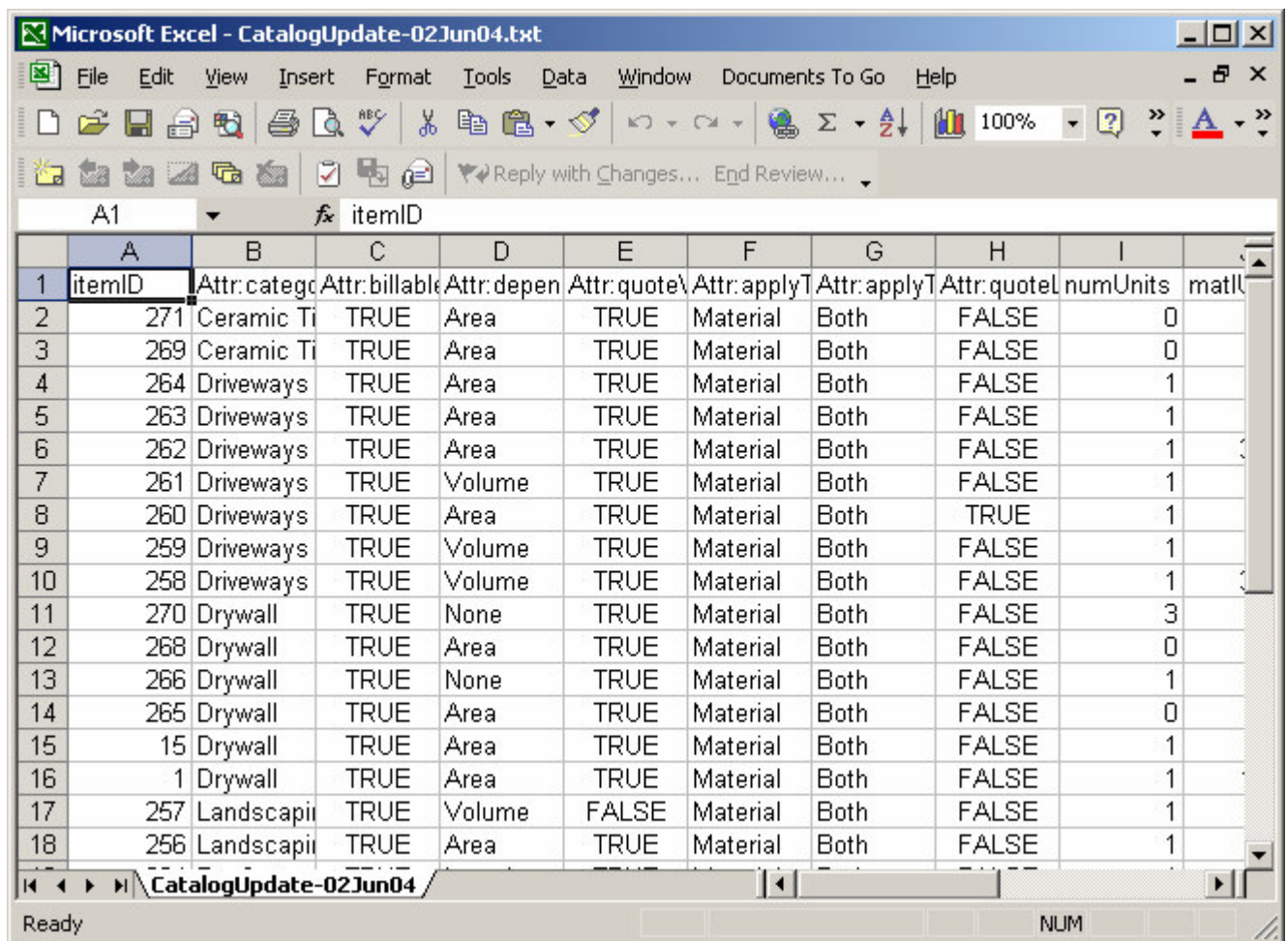
Text value.

Column note

Text value. When exported, the note text is modified. Each line will end with a '^' (circumflex or hat character). Any '^' are interpreted as end of line when the note field is imported.

Importing Catalog Items

The Companion will import catalog items from text files formatted as described in the **Exporting Catalog Items** section above. Each column in the import file must contain a valid column name. The easiest way to create an import file is to first export a category and then use the export file as the starting point for a new import file. Using a spreadsheet application to edit the file is the recommended way of manually creating an import file. Be sure to save the spreadsheet file as a tab delimited text file. Here is an example of an import file being edited in **Microsoft Excel**:



	A	B	C	D	E	F	G	H	I	J
	itemID	Attr:category	Attr:billable	Attr:depend	Attr:quote	Attr:apply	Attr:apply	Attr:quote	numUnits	matl
1	271	Ceramic Tiles	TRUE	Area	TRUE	Material	Both	FALSE	0	
2	269	Ceramic Tiles	TRUE	Area	TRUE	Material	Both	FALSE	0	
3	264	Driveways	TRUE	Area	TRUE	Material	Both	FALSE	1	
4	263	Driveways	TRUE	Area	TRUE	Material	Both	FALSE	1	
5	262	Driveways	TRUE	Area	TRUE	Material	Both	FALSE	1	
6	261	Driveways	TRUE	Volume	TRUE	Material	Both	FALSE	1	
7	260	Driveways	TRUE	Area	TRUE	Material	Both	TRUE	1	
8	259	Driveways	TRUE	Volume	TRUE	Material	Both	FALSE	1	
9	258	Driveways	TRUE	Volume	TRUE	Material	Both	FALSE	1	
10	270	Drywall	TRUE	None	TRUE	Material	Both	FALSE	3	
11	268	Drywall	TRUE	Area	TRUE	Material	Both	FALSE	0	
12	266	Drywall	TRUE	None	TRUE	Material	Both	FALSE	1	
13	265	Drywall	TRUE	Area	TRUE	Material	Both	FALSE	0	
14	15	Drywall	TRUE	Area	TRUE	Material	Both	FALSE	1	
15	1	Drywall	TRUE	Area	TRUE	Material	Both	FALSE	1	
16	257	Landscaping	TRUE	Volume	FALSE	Material	Both	FALSE	1	
17	256	Landscaping	TRUE	Area	TRUE	Material	Both	FALSE	1	

Microsoft Excel - CatalogUpdate-02Jun04.txt

File Edit View Insert Format Tools Data Window Documents To Go Help

100%

Reply with Changes... End Review...

H2 FALSE

	H	I	J	K	L	M	N	O
	Attr.quoteLot	numUnits	matlUnitCost	matlMarkup	servUnitCost	servMarkup	wasteFactor	dependencyf
1	FALSE	0	0.61	0	0	0	0	0.3
2	FALSE	0	0.61	0	0	0	0	0.3
3	FALSE	1	0	0	2	0	0	
4	FALSE	1	29.4	20	0	0	0	
5	FALSE	1	35.65	0	0	0	0	
6	FALSE	1	29.4	20	0	0	0	
7	TRUE	1	200	20	0	0	0	
8	FALSE	1	0	0	0	0	0	
9	FALSE	1	35.65	20	0	0	0	
10	FALSE	3	1.99	0	0	0	0	
11	FALSE	0	14	0	0.6	0	0	
12	FALSE	1	0	0	25	0	0	
13	FALSE	0	0	0	0.6	0	0	
14	FALSE	1	9.97	0	0	0	10	
15	FALSE	1	14.88	0	96	0	10	
16	FALSE	1	25	20	100	20	0	
17	FALSE	1	7.42	20	18	20	0	
18								

CatalogUpdate-02Jun04

Ready NUM

Note that if the import file contains items for a category that does not exist in the current QuoteNerd data, the Companion will attempt to create a new item category. If a new category cannot be created – perhaps the maximum number of columns already exists – the new item will be created in the **Unfiled** category.

Companion Tips and Shortcuts

- Client Jobs that are archived from the Companion will not appear in the Archived Jobs view until after the handheld is synched with the desktop.
- Right clicking on the tables in the Quote or Summary form allows copying of the selected rows in the tables to the Windows clipboard. This information can then be pasted into any number of applications such as a word processor or spreadsheet.
- Double click, where you would just single click on the handheld, to open a job or item in a list. Double click the Note column to edit a note for the job or item directly from the list.