

mpengo Quotes 3.0:

A Quick-Start Guide

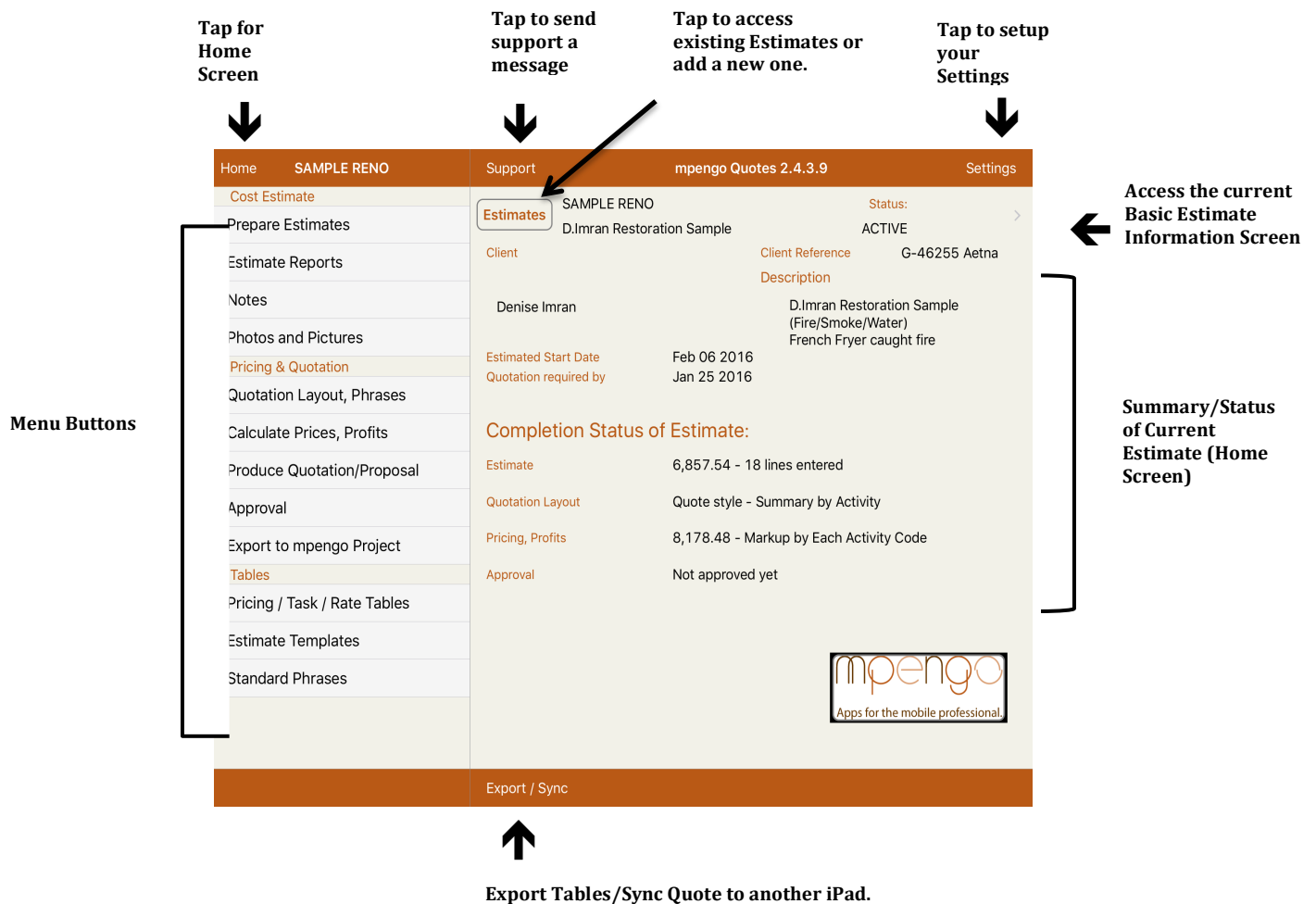


mpengo Quotes 3.0: A Quick-Start Guide

Welcome to mpengo Quotes. It's a great tool to help you create Quotes, Estimates, and Scope of Work right at your clients or prospects site.

The easiest way to learn mpengo Quotes is to walk through this guide with the sample estimate included in the app. You'll quickly learn the features and work flow.

You can make any changes you want to the sample. Add to the estimate, change your markup prices, your quotation layout, and so on..



App Buttons:

Generally, the app uses the following conventions:

[Back] - returns to the previous screen or menu, and does not save any data entered

[Done] - saves your work and returns you to the previous screen

[+] icon - tap to add a new record, line, or other piece of information

[Trashcan] icon - tap to delete a record

*Tapping outside the window - works the same as the [Back] button. Remember that your work is **NOT** saved when you do this.

How it Works – A Quick Overview:

- Enter Company information and business details in **Settings**
- Build or import your **Pricing / Task / Rate Tables** to reflect the services and materials you provide and their respective rates.
- Create or import Activity Codes and compile them into **Estimate Templates**.
- Create a new estimate by tapping the **Estimates** button along the top of the screen, and then tap the plus symbol (+) to enter a Reference Code, description and the relevant client information. Here you also add the Estimated Project Start Date, Quote Needed By date, Pricing Method, Default Price Table, Default Estimate Template and any Percentage Discount on Entire Quote.

***NOTE** on Percentage Discount on Entire Quote: The Discount Percentage will no longer be applied once a 'Price Agreed Upon' has been updated in the Approvals section. The Discount will be based on the difference between the price entered and the subtotal.*

- Use **Prepare Estimates** to add the various activities associated with the quotation.
- After some or all of the details have been entered, use **Calculate Prices, Profits** to setup the markup percentages or amounts and generate the price that will be presented to the prospective client.
- Customize your quotes using the **Quotation Layout, Phrases** function.
- At any time tap **Photos and Pictures** to add photos to the quotation
- **Produce Quotation/Proposal**, which can be then be emailed to the client or AirPrinted.
- Use **Approval** to have the customer agree on the amount. Fill in Approved By, change the status to WON and tap Approval Signature to have your client sign directly on the iPad. You can also email a copy to the client that includes the customer's acceptance signature. Remember to tap **UPDATE** when finished.
- Run **Reports** whenever you wish to look at information, or to email or AirPrint your reports.
- Add **Notes** at any time to keep track of items and/or place reminders into your Calendar app.

Note: If you are in the Fire/Water/Restoration Business, or an Insurance Adjuster:

We've added a couple of special features to help you in your work:

In Basic Estimate Information (Tap the blue disclosure button to the right of the Estimate reference code and description or along the top of the display) you can tap '**Scope of Work**'.

This turns off pricing in the estimate, and you can prepare your estimate and takeoff without any reference to unit prices. It also adjusts the layout of some of the reports.

The Menu:

Home	SAMPLE RENO
Cost Estimate	
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The menu sidebar is available to you everywhere you are in mpengo Quotes. You can easily switch from section to section by tapping on the menu.

Before changing screens, remember to save your work with the [Done] button.

Settings Screen:

Company & Support Info: Enter your name, company, city/region, address, personal email, and telephone so that we are able to help you if you have a Support question. When you contact us, we'll also add you to the notification list for future updates and tips. We will never share your address with anyone.

Make sure your company name and address is accurate, as the company name and address will appear on the top of your quotation. Your email, phone and fax will also appear on the top of your Quotation.

Tip: if you wish to hide your email address, phone or fax number from your Quotation then place an asterisk (*) before or after the phone numbers or email address.

Taxes on Client Quotations: let you include a tax calculation on your quotation, if desired.

< Back	Settings	Done
Company Info		
Company & Support Info		
Calculations		
Taxes on Client Quotations		
Room Calculation Units		
Header/Footer/Logo/Type of Work		
Standard Header		
Standard Footer		
Company Logo		
Type of Work		
Approval Text		
Proposal/Quotation Title		
Email Salutation		
Quotation Style and Report Colors		
Cost Groups		
L - Labor		
M - Materials		
E - Equipment		
S - Subcontract		
F - Fringes		
O - Other		
1 - Spare 1		
2 - Spare 2		

- Enter your appropriate tax rate. If you require multiple tax rates, leave the taxes as 0.00 and indicate '*plus applicable taxes*' in your text. You can set up a phrase code and have this included in your quotation layout.

- U.S.: Tax 1 = use composite rate if applicable, Tax 2 is usually blank. Or, if you are in a state that has State and Local taxes, you can set both taxes.

- U.K., E.U.: Tax 1 = VAT, Tax 2 is usually blank.

- Canada: Tax 1 = HST/GST, Tax 2 = PST (if applicable)

- Canada (PEI): turn ON Tax 2 switch - your province requires it.

Room Calculations Units: In *Room Calculations* you have the choice of using ft. (imperial, US), cm (metric), mm (metric) or m (metric). **Please note that if you change your units of measure later you will see a question asking whether you wish to convert ALL existing room dimensions in ALL estimates. BUT, note that the conversion will lose accuracy if you flip room Units back and forth.

Standard Headers and Standard Footers come preset with default descriptions that can be tailored to suit your company requirements. These headers and footers are automatically included on every quotation form. If you wish not to use the header or footer on a particular quote, go to Produce Quotation/Proposal to turn them off.

Company Logo will let you attach an image to the top of your Quotation. To do so, just tap Company Logo and follow the instructions.

Type of Work: You have the option of changing the default descriptions. Type of work can be selected when you prepare your estimate. You can run a report on the type of work by selecting either one of the estimate reports.

Approval Text: A sample approval text is already included. You may wish to use this or edit to create your own phrase.

Proposal/Quotation Title: Customize the description for your Quotation or Proposal.

Email Salutation: The 'Email Salutation' setting allows the user to override the 'Sent from mpengo Quotes' message.

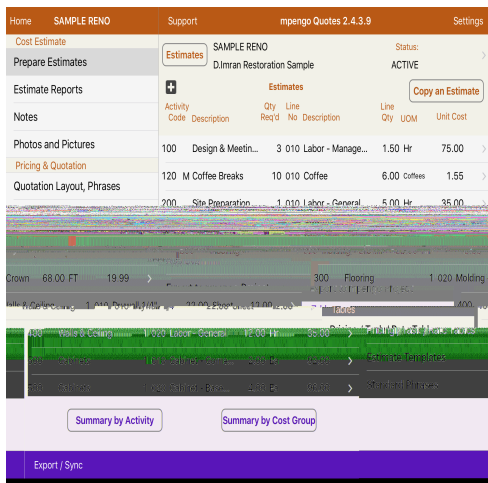
Quotation Style and Report Colors: Option to select from 4 different Quotation Header Styles and Report Column Heading Colors.

Cost Groups: For more advanced users, cost groups let you breakout your estimate into standard cost categories. When used consistently during estimating, it allows you to markup by cost group (e.g., 25% markup for Labor, 15% for Materials). This table simply sets out the descriptions of the standard groups or categories.

Prepare Estimates:

Estimates are created from a list of activities, their costs, and their quantities on this screen. These are the combination of rate codes and activity codes in your estimate templates.

Before using this screen, it's suggested that you create or import your rate codes in the Pricing / Task / Rate Tables screen and create or import estimate templates in the Estimate Templates screen.



Activity Code	Description	Qty	Line	Reqd	No	Description	Line Qty	UOM	Unit Cost
100	Design & Meetin...	3	010	Labor - Manage...	1.50	Hr	75.00		
120	M Coffee Breaks	10	010	Coffee	6.00	Coffee	1.55		
200	Site Preparation	1	010	Labor - General	5.00	Hr	35.00		

Once you have created an estimate template and a pricing / task / rate table, you can select your default templates for the estimate by tapping the blue arrow button in the top right of the screen. Then in the pricing section, tap 'Estimate Template to use' and 'Default Price Table'.

Any activity displayed on the screen can be edited by tapping the blue arrow button to the right of the entry. New activities can also be added by tapping the [+] button. Note: Edits or additions will be used in this estimate only. They will not be saved in the template used.

To view a summary, tap Summary by Activity or Summary by Cost Group at the bottom of the screen

Preparing an Estimate – additional functions and hints: Copying an Estimate:

- When creating an estimate, you can use an estimate you have already created for a similar job. Simply Tap the [Copy an Estimate] button.
- You can also use the Copy an Estimate function to put together a new estimate from groups of activities you use often.

For example, mini-estimates could be created for various flooring options: one for carpet and another for hardwood. Then during the creation of a new estimate, you would use the **Copy an Estimate** feature to pull in either a carpeted floor finish, or one with hardwood, and delete the activities not applicable.

Hint: when you go this method, set up a coding convention for your Activities. For example, you might create estimates coded such as ASMBLY-FLOORING, and then inside each estimate restrict your activity code range to, say, the 9000 series so as not to impinge on the other codes you are using in the actual estimate (e.g., within the flooring mini-estimate you would have estimate code 9010 Carpeted floor, 9020 Hardwood, 9030 Cork, and so on. Or a mini-estimate coded as STD-TREES which contains 9010 3' Tree and 9020 6' Tree, each having line items for excavation, placement, materials, mulch, equipment and so on. **Please note** that if you choose to use Copy Estimate it will only load an estimate that has **different activity codes** from the ones already in your estimate.

The top section of the Prepare Estimates screen contains the *Qty. Required* field that provides a quick method of increasing or decreasing the quantity of all detail lines associated with an activity code. For example, if the client requests two additional trees, simply increase the quantity by 2. The item can also be removed altogether from the quote by setting the value to zero.

Tap **Add Notes** to enter your general observation about each activity. This will appear in your *Scope of Work Report*.

The middle section includes a **Room Calculator, Materials Calculator and a Regular Numeric Calculator**. Fill in the appropriate information (e.g., Length, Width, Height, Thickness), and tap one of the **RESULTS** to transfer the value and UOM to your estimate.

During the entry of detail line items (third section) for an activity code that consists of multiple actions, a *Save & start next line* option has been provided. This feature saves the line item you just entered, preserve all of the common information, increment the line number and allow for entry of the new line item. For example, installing

carpet might be broken down into several line items; 010 – labor to remove old carpet, 020 – nail strips, 030 - installation of under pad, 040 - new carpet and 050 – labor to install new carpet. Or, just tap **Done** to save that line and return back to the list of Activities already created.

Estimate Reports:

Run **Reports** whenever you wish to look at information, or to email, or AirPrint your reports. You have the option of choosing HTML or PDF format also.

Outstanding Active Estimates: gives a summary of all Estimates with an ACTIVE status which includes estimated start date, estimated cost, client quoted price, profit, profit percent and date quote is required.

Company Summary: gives you all same information as Outstanding Active Estimates but includes ALL status of quotes (i.e. Active, Won, Lost).

Detailed Estimate: gives you a detailed report of the current estimate and breaking up the details by Activity code.

Detailed Estimate with Std Hrs: same as Detailed Estimate but also includes Std. Unit Hrs. and Total Hrs.

Summary by Activity: lists the activity code, description, estimated cost, client quotation and mark-up percent for the current Estimate.

Scope of Work: this report includes your quotation, insurance information, room dimensions and general notes for each activity.

Notes: shows detail for all notes entered for current Estimate including Follow-up information entered and reminder date.

Notes:

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Date

November	7	2015
December	8	2014
January	9	2015
February	10	2016
March	11	2017
April	12	2018
May	13	2019

Note

Follow Up

Remind Me ☐ Date and Time

To add a note:

Tap (+)

Indicate date, note, and follow-up. You also have the option to set a Remind Me and Date and Time to be inserted into the Calendar app.

Photos and Pictures:

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Estimates SAMPLE RENO Status: ACTIVE
D.Imran Restoration Sample

Photos and Pictures

You can attach up to six photos to your formal quotation by pressing on the "+" symbol above.

Photo Caption Description

Export / Sync

Tap Photos and Pictures then (+) to add photos from your existing Photos App or to take a picture with the iPad Camera. Be sure to enter a caption, as this is what appears on the PDF format only of the Quotation. You are permitted up to 6 pictures.

Note: if you take the picture with the camera inside of Quotes they are not stored in your Photos App. They are stored with the Quote. If for any reason you wish to keep these pictures after you delete the Quote then we suggest you take the pictures with the Camera App and then insert into mpengo Quotes.

Quotation Layout, Phrases

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Quotation Layout Copy a Layout

Order	Type	Code	Description
1.0	PHRASE		
2.0	PHRASE		
3.0	PHRASE		
4.0	PHRASE		
5.0	QUOTE		Summary by Activity
6.0	PHRASE		
7.0	PHRASE	Terms	Payment is due within 30 days of invoicing...
8.0	PHRASE	Payment	All Payments are subject to applicable legi...
9.0	PHRASE		
10.0	PHRASE		We hope you like our quotation.

Export / Sync

The layout of a quotation is unique to each Estimate. You can copy an existing Quotation Layout from another estimate by tapping **Copy a Layout** button on the quotation layout screen.

When adding a phrase line, you can tap the lookup button to draw from your existing table of phrases, or simply start typing free form. On the Quote line (the default is Sort Order # 5.0), indicate whether you wish to have Summary by Activity, Fully Detailed Quote or a One Line Quotation. If you choose a One Line Quotation then type in a 'Phrase, or lead-in' to the quote in the phrase area, such as ' The details of your quotation are: '.

Also included is a "Break Page after this line (for printing)" feature that you can turn on or off. This allows you to choose where you

would like a printer page break on your Quotation/Proposal. Note: web browsers are notoriously 'finicky' when it comes time for printing a document, so sometimes you may have to play with your browser and document settings (fonts, sizes, orientation, etc.) to get things to print properly.

To change the layout of your Quote select Line 5 and choose one of the following:

Summary by Activity: Shows one line per activity

Fully Detailed Quote: Detailed quote with quantity, units & amounts.

One Line Quotation: A single total before discount & taxes.

Fully Detailed-Summary Total: Detailed but NO quantity, units or amounts.

Calculate Prices, Profits:

Activity Code	Estimated Cost	Markup Percent	Quotation Price
100 Design & Meetings	337.50	15.00	388.13
120 Coffee Breaks	93.00	15.00	106.95
200 Site Preparation	175.00	15.00	201.25
300 Flooring	2,814.64	15.00	3,236.84
400 Walls & Ceiling	684.00	15.00	786.60
500 Cabinets	961.00	15.00	1,105.15
600 Subcontracted Work	1,236.93	15.00	1,422.47
700 Finishes	327.97	15.00	377.17
900 Cleanup	227.50	15.00	261.63
Total Cost:	6,857.54	Total Quote:	7,886.19
Markup Percent to apply to all lines:		15.00	

Use **Calculate Prices, Profits** to setup the markup percentages or amounts and generate the price that will be presented to the prospective client.

You have the option to enter a Markup percent by individual activity code or enter a Markup Percent to apply to all lines.

Note: you can still go and change an individual markup percent on an individual activity code even though you used the Markup percent to apply to all lines feature.

Produce Quotation/Proposal:

Produce Quotation/Proposal will create a report that can be emailed to the client or AirPrinted.

Choose which items are to be included on your Quotation/Proposal such as:

- Company Logo
- Co. Name and Address (if not on logo)
- Standard Header Phrase
- Standard Footer Phrase
- Include Approved By and Approval Signature
- Include Insurance Information.

Select HTML or PDF and tap proceed to produce your Quotation.

Note that HTML quotations do NOT include photos

Approval:

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Estimates SAMPLE RENO Status: ACTIVE
D.Imran Restoration Sample

Quotation Approval

D.Imran Restoration Sample (Fire/Smoke/Water) French Fryer caught fire

Current Quotation 8,178.48
Price Agreed Upon 8,178.48
Tax 1 Amount 0.00
Tax 2 Amount 0.00
Total Price (incl. tax) 8,178.48

Date Approved
Approved By
Status: ACTIVE WON LOST

Approval Signature Update Email Approval

Export / Sync

Tap **Approval** to have the customer agree on the amount. Then fill in Approved By, change the status to WON and tap Approval Signature to have your client sign directly on the iPad. You can also email a copy to the client that includes the customer's acceptance signature. Remember to tap **UPDATE** when finished.

Export to mpengo Project:

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Estimates SAMPLE RENO Status: ACTIVE
D.Imran Restoration Sample

Export to mpengo Project

What Export does:
Export creates a special tab delimited file, designed to integrate with mpengo Project.
It copies the cost estimate details from your quotation, and passes it to Project:
- You can setup the new project in Project in advance before importing
- Or you can ask Project to automatically create the project for you

The data that will be collected and sent is:
Activity Code Cost Estimate Quantity Estimate
Cost Group Hours
Description Unit of Measure

The formats available are:
- Summary: (eg) If activity code 0010 had 2 lines 10 & 20, a single line 0010 is created
- Detailed: (eg) If activity code 0010 had 2 lines 10 & 20, lines 0010-10 & 0010-20 are created, preserving the details of the original estimate

Note: though the file is a tab-delimited file, it has a special suffix of .mqexp2

Export in Summary Format Export in Detailed Format

Export / Sync

mpengo Quotes provides the ability to send the cost estimate details of a quotation over to our companion product **mpengo Project**, which gives you the ability to fully manage the costs and progress of your new project. You can setup the new project in mpengo Project in advance before importing or you can ask Project to automatically create the project for you. Please read "What Export Does" in **Export to mpengo Project** and then choose your format. Tap Export in Summary Format or Export in Detailed Format and email the resulting data file to yourself: then, in Mail, merge the file by going to the email, tap and hold the file image until you get the option to 'Open with mpengo Project' and tap that option. For advanced users, the file created is a common tab-delimited file suitable for import into Excel and Numbers. The filename has a file extension of 'mqexp2' to make it recognizable to mpengo Project.

Pricing/Task/Rate Tables:

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D.Imran Restoration Sample

+ Pricing / Task / Rate Tables Import Rates

Table Name

FULL HOUSE RENO
General Sample
Interior Design
Kitchen Reno
Labor Rates
Masonry

Export / Sync

There are two ways you can go about creating your pricing tables: you can create one master table that contains all rates and materials and simply use one table throughout your estimate, or create separate tables for materials, labor rates, special items and so on. The master table is simple but might become a large table to scroll through if not organized well: the second is cleaner, but requires you to shift from table to table as you prepare your estimate – the choice is yours! Personally, we went the single table route – less tapping and keys to hit while you prepare your estimate, but a bit more scrolling through the list.

Tap (+) to create a new table and enter a name for the table

Tap (+) to add a new Rate Code

Enter a code for the item, description, the typical quantity and unit of measure, and the unit cost and/or labor rate as applicable.

Tap **Done** when finished to add the item to your list.

RATE TABLES can also be created in Excel and imported. Please tap **IMPORT RATES** for instructions.

Estimate Templates:

Templates are used to simplify the entry of activity codes when preparing estimates by allowing activities associated with a particular type of project to be grouped into a single template. For example, one template could contain activities related to the renovation of a bathroom while another could be used for building an addition to a home. We've included a few simple templates as examples and to use if they serve your business model.

To add a new template:

Tap (+) to add a new template and enter a name for the template.

You may also create an **ESTIMATE TEMPLATE** in Excel. Tap **IMPORT TEMPLATES** for instructions.

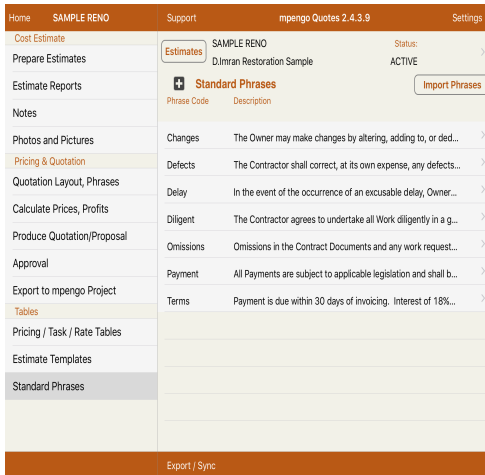
Tip: If you use numbers for your activity codes you may want to be consistent with the number of digits for sorting purposes. Example: if we have Activity codes of 100, 200, 300 and so on and then add 1000 it will sort the following way: 100, 1000, 200, 300 etc.

To add an activity code:

Tap (+) and enter the code and description

Select a cost group and enter the UOM (unit of measure) if applicable.

Standard Phrases:



These are used as part of the Quotation Layout and provide a quick way of including phrases such as payment terms or standard legal disclosures.

Tap (+) to add a new phrase and enter the Phrase code and description

Standard Phrases can also be created in an Excel Template and imported. Please tap **IMPORT PHRASES** for instructions.

Note: Importing uses data files with the following file extensions:

.mqtemplates for Estimate Templates

.mqrates for Rate Tables

.mqphrases for Standard Phrases

If using a PC and depending on your version of Windows you will need to go to My Computer/Folder Options or Organize /Folder and Search Options/View and UNCHECK the option that says “hide extensions for known file types” in order to be able to see, and change the name of your file extension for import.

Export/Sync



Export Data to another iPad: will allow you to export Rate, Templates and Phrase Tables to another iPad. Tap the export button to email the file. Then follow the instructions in the email. **IMPORTANT NOTE:** remember to do this first if you are going to export a Quote to another iPad so you have the same tables.

Synchronize Data:

Send this Quote to another iPad – here’s how

- Be sure you have already exported your Rate, Template and
- Phrase Tables to the other iPad
- Next select the Quote you wish to sync
- Tap Sync, and email the data file to the other device
- The email will contain instructions on how to merge the data
- Pictures and photos are not synced due to their large size

Other Information

A note on Memory: you may encounter memory limitations on your iPad (most iPads come with 1GB of working memory which is divided up between the internal operating system and your active apps—we're not referring to the 16GB, 32GB, or 64GB storage that you purchased with your iPad - that is data storage).

In general, when an app is no longer visible it will not be using any memory on the device. This is sometimes referred to as moving an app to the background but in fact, most apps are actually suspended and removed from memory. An exception to this statement is an app that is performing an activity in the background such as a navigation app.

A new feature is available in iOS 9 that allows specially designed apps to execute in a split screen mode. In this case, both apps are sharing the available memory and resources of the device.

To close apps active in the background (iOS 7, 8 and 9)

- Double tap the Home button to bring up the multitasking view.
- Swipe or flick up on the screenshot (not icon) of the app you want to exit.
- The app will fly off the screen and release its resources.
- When done, tap the screen with all your icons or double tap the home button.

To close apps active in the background (iOS 6)

- Double tap the Home button to bring up the multitasking bar of apps that are still active.
- Tap & hold on one of the apps until the icons start to 'wiggle' with a red (-) beside each app.
- Tap the (-) minus symbol above any unused app that you wish to close down (it's probably a good idea to keep your Phone app and your Mail app active).
- When done, tap anywhere on the screen above the bar or tap your home button.

If you have questions:

If you have any problems or questions, just tap Support, enter a subject, tell us your question, and tap Send. Remember to first indicate your contact name and email in Settings / Company & Support Info. You can also reach our support people (who are based in the U.S. and Canada) by sending a direct email to support@mpengo.com.

Our mpengo **Questions & Answers FAQ's** are also available by going to www.mpengo.com and selecting Support.

Develop this App with your support and comments!

If you like what you see, help support us by taking a look at some of our other apps that are also geared to provide help for business professionals out in the field – and tell your friends! We'd like to develop more tools suited to your needs, but need your help to spread the word. And send us your suggestions!

A good review on the App Store would also be greatly appreciated!