



## C-Cube

### User Guide

December 2021

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VENTES | PROJETS | RÉFÉRENCES

#### C-Cube par Porképic Solutions Inc

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www.ccubeapp.com | 418 956-5922 | 514  
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## Introduction

This training is offered to users to familiarize them with all the operations of the C-Cube cloud management application.

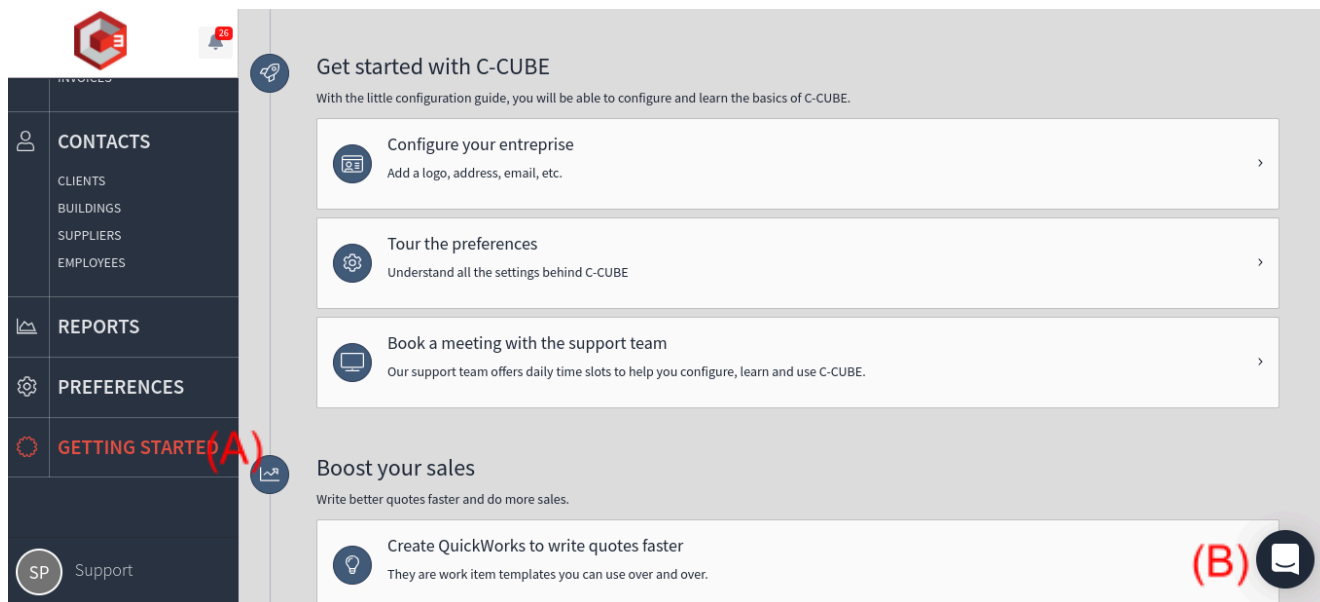
It's essential to consider that C-Cube evolves its procedures and interfaces in a very dynamic way, often without notice. This will inevitably lead, over time, to discrepancies, even inconsistencies, between the information and procedures that will be communicated during training and what you will eventually see on the screen as you use it. Your company's IT managers need to be aware that they will need to provide ongoing training and stay abreast of the changes Google is making to its environment.

We will do our best to keep this document up to date. It will evolve with the application. Make sure you have a link and an internet connection to have the document up to date.

# C-Cube

## 1. Online support

C-Cube has set up an online support to answer more efficiently the questions of the entrepreneurs using the interface. It's jointly linked to this user guide since the *Getting Started* section and the chat bubble are the two other support options available. Several video links are available to facilitate the integration of the procedures and the different functionalities.



(A) Select *Getting Started* in the menu options. This will redirect you to the image above. You can configure and learn the basics by yourself with this short configuration guide.

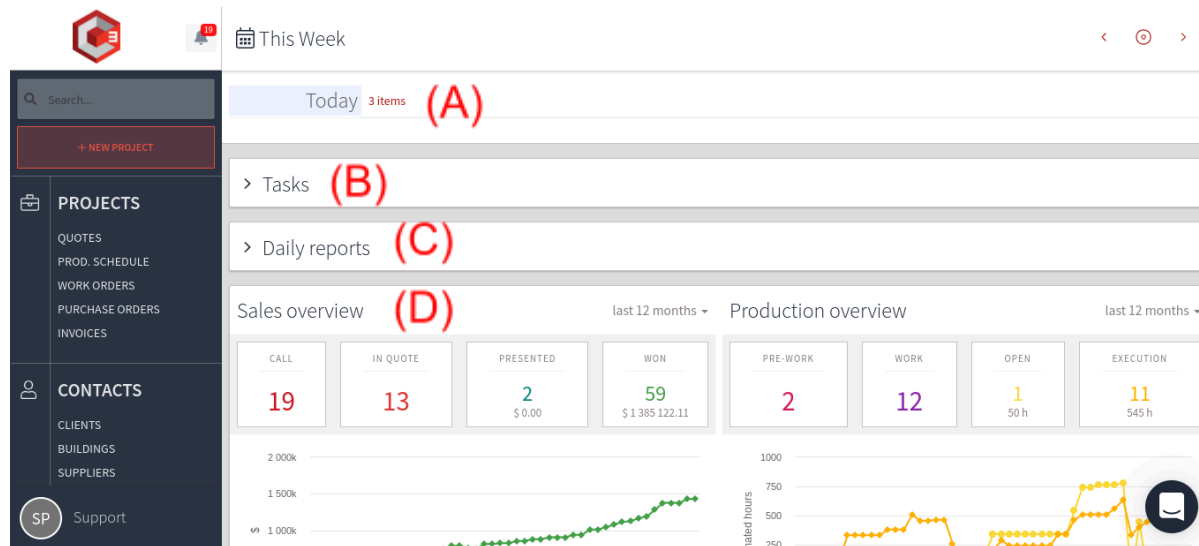
Every white box takes you to the options of this feature offered by C-Cube. For example, the enterprise configuration allows you notably to change the logo and/or the company information while the preferences tour directs you towards a video link that explains the complete procedure and the link to change the preferences.

(B) Click on the bubble at the bottom right, then on *Send us a message*. This allows you to send a message directly to the C-Cube platform to a support technician. The response time is usually less than 10 minutes.

It's also possible to consult all the conversations you had with the support until now.

## 2. Dashboard

The dashboard visual is as shown in the image below. Click on the company logo in the top left corner to access the dashboard at any time.



### 2.1. Calendar

(A) The calendar allows you to visualize all the upcoming actions for the week.

You can change the week by clicking on the arrows in the upper right corner. Besides, the circle in the center of the arrows allows you to go back to the current week.

The [projects](#) are accessible directly in the calendar by selecting the right one. In addition, project follow-ups and [daily reports](#) can be completed and verified in the calendar when they have already been created in the project.

### 2.2. Tasks

(B) To add a new task, click on *Task* in the upper right corner. Several options can be included such as the task's name, notes, attached files, the assignment to an employee and the deadline.

As soon as the task is created in the quote section, it will be added to the complete list of tasks in the dashboard.

To view all tasks, click on *All* at the top right. Also, the *Completed tasks* section can be consulted at the bottom of this page.

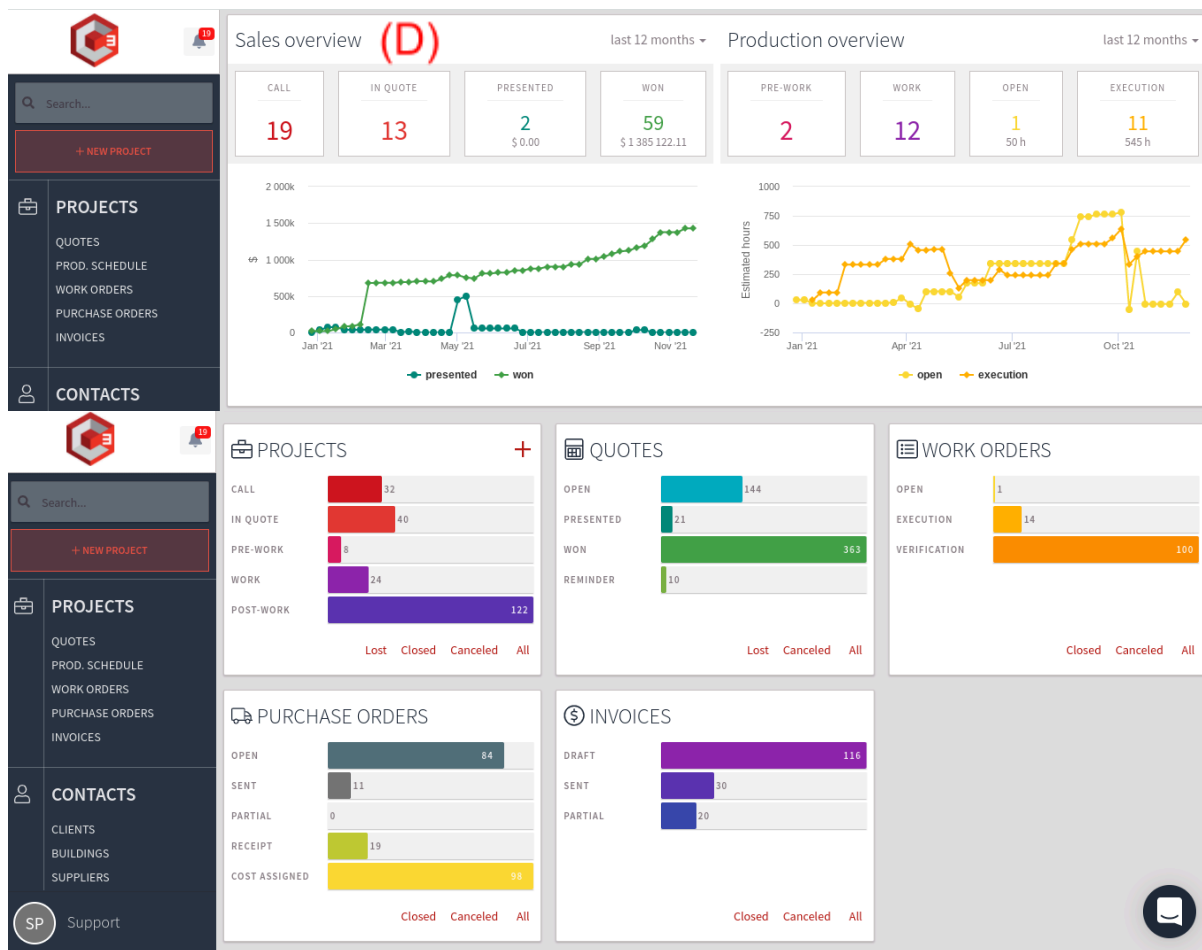
## 2.3. Daily reports

(C) This section lists all current daily reports for ease of reference. If you have any questions, please refer to the [Daily reports](#) section below.

The *Daily report* box provides access to all open work orders. If the work order doesn't appear in the list, click on *Check out the complete list*. The link will redirect you to the [Work orders](#) section.

## 2.4. Sale and production overview

The sale and production overview for all projects is represented in a respective graph. The sales are illustrated by the curves of quotes submitted and quotes won while the production is illustrated by the curves of open work orders and project executions in progress.

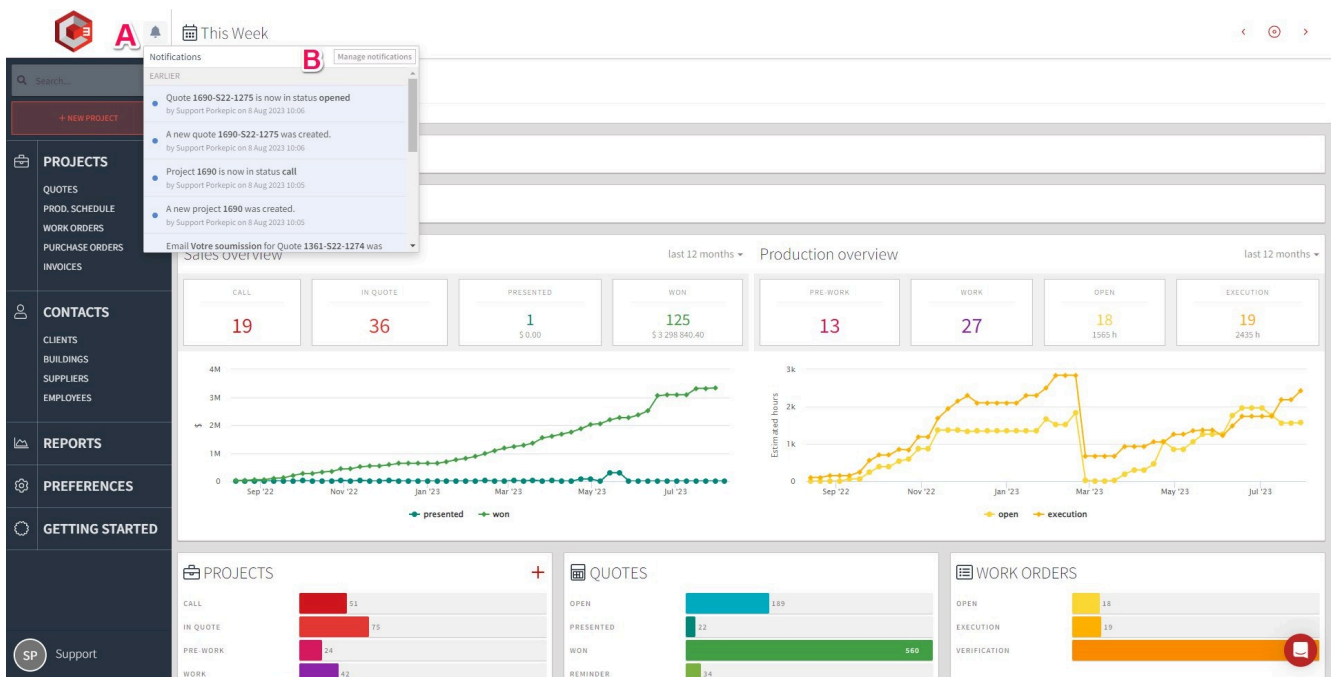


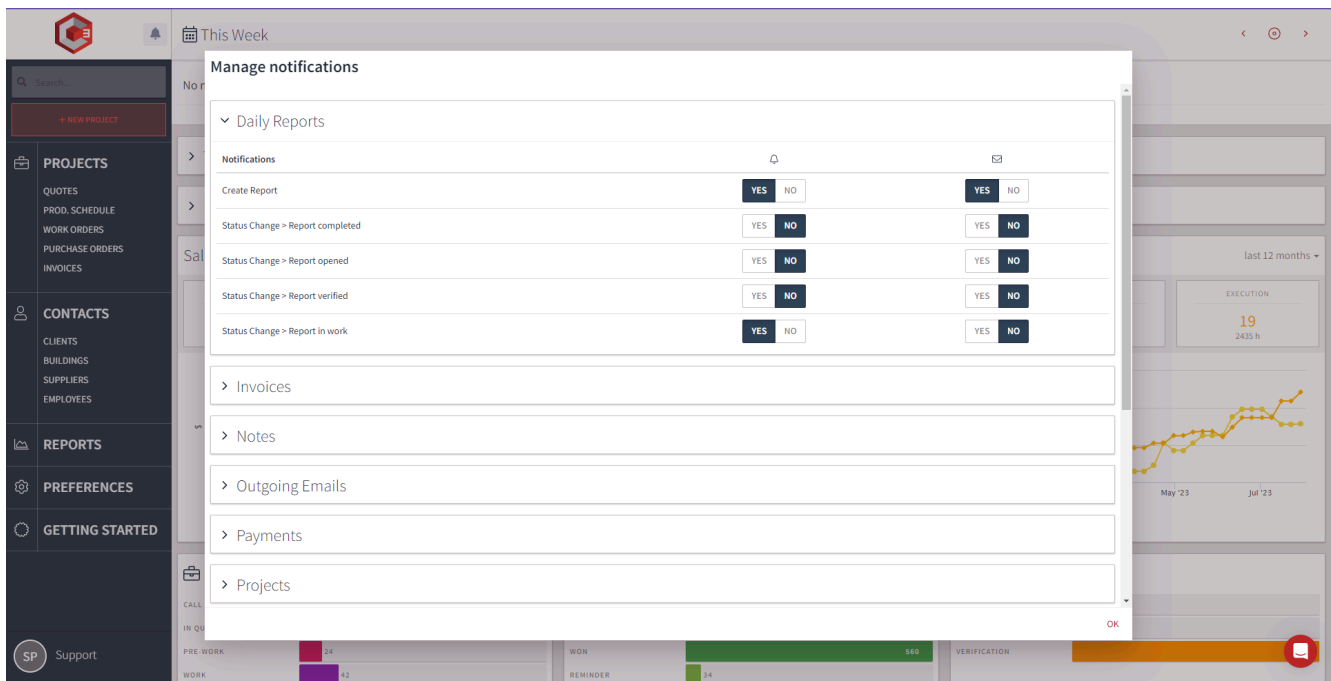
(D) It's possible to modify the time period above the graph. Several are available including the current year, every 12 months, last month and last week.

Moreover, there are five bar charts that allow you to visualize all of the main functions using different colors. These diagrams are a practical tool that helps to synthesize information about the projects undertaken by the company while imaging the process from the creation of the project to its invoicing in real time. It's possible to click on *Closed*, *Canceled* or *All* at the bottom of each diagram to access all the data related to the diagram in question.

## 2.5 Notifications manager

**(A)** To select the notifications received by email, click on the little bell and then select **(B)** "manage notifications" '. At this point, you can choose whether you want to be notified (little bell) or receive an email.



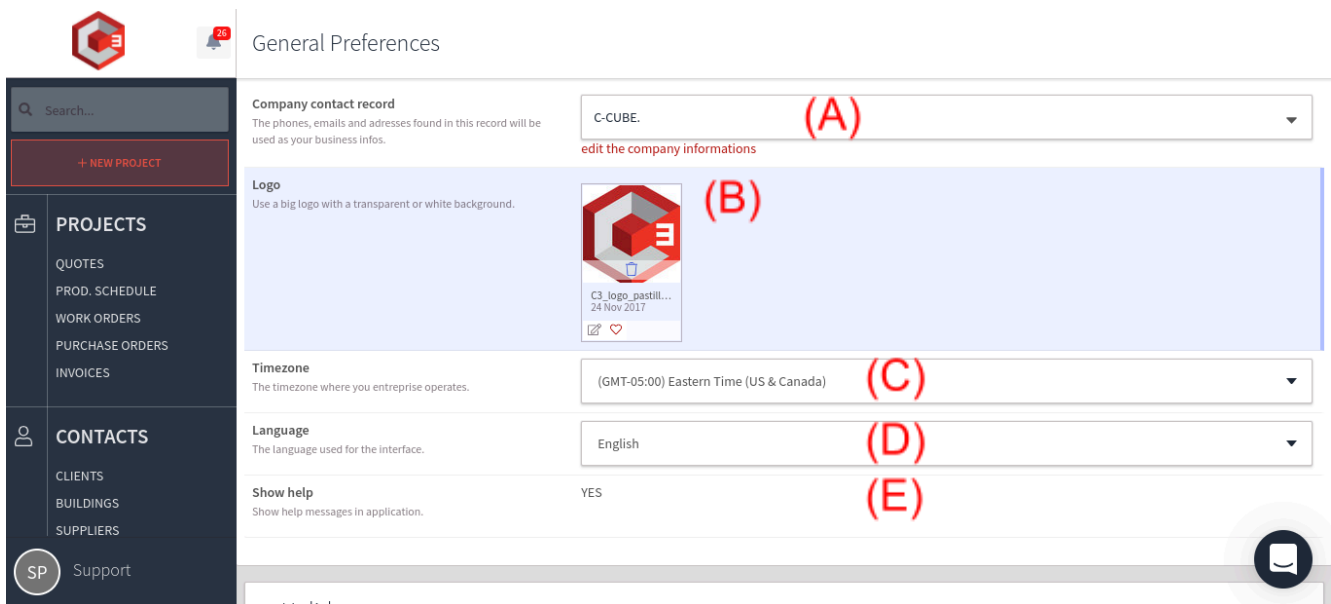


### 3. General preferences

#### 3.1. Company

This section frames all changes to a company's general preferences.

(A) Select the right company to modify the file. Then, click on *Edit the company information*.



### 3.1.1. Logo

(B) Upload your logo image. It's recommended to have an image that is large and readable on a white background.

### 3.1.2. Time zone

(C) Select the good time zone based on the location of the company.

### 3.1.3. Languages

(D) Choose between the two possibilities that are offered, French and English. The selected language is applicable to all the functionalities of the interface. Please note that the option is also applicable to all users of the same company.

### 3.1.4. Tooltips

(E) Designate if you want to keep the tooltips when browsing the platform. It's advisable to activate it at the beginning in order to get familiar with the interface more quickly, then remove it when the need is no longer present.

### 3.1.5. Days off and holidays

All the days off and holidays are listed in this section.

General Preferences

Search...

+ NEW PROJECT

PROJECTS

- QUOTES
- PROD. SCHEDULE
- WORK ORDERS
- PURCHASE ORDERS
- INVOICES

CONTACTS

- CLIENTS
- BUILDINGS
- SUPPLIERS

SP Support

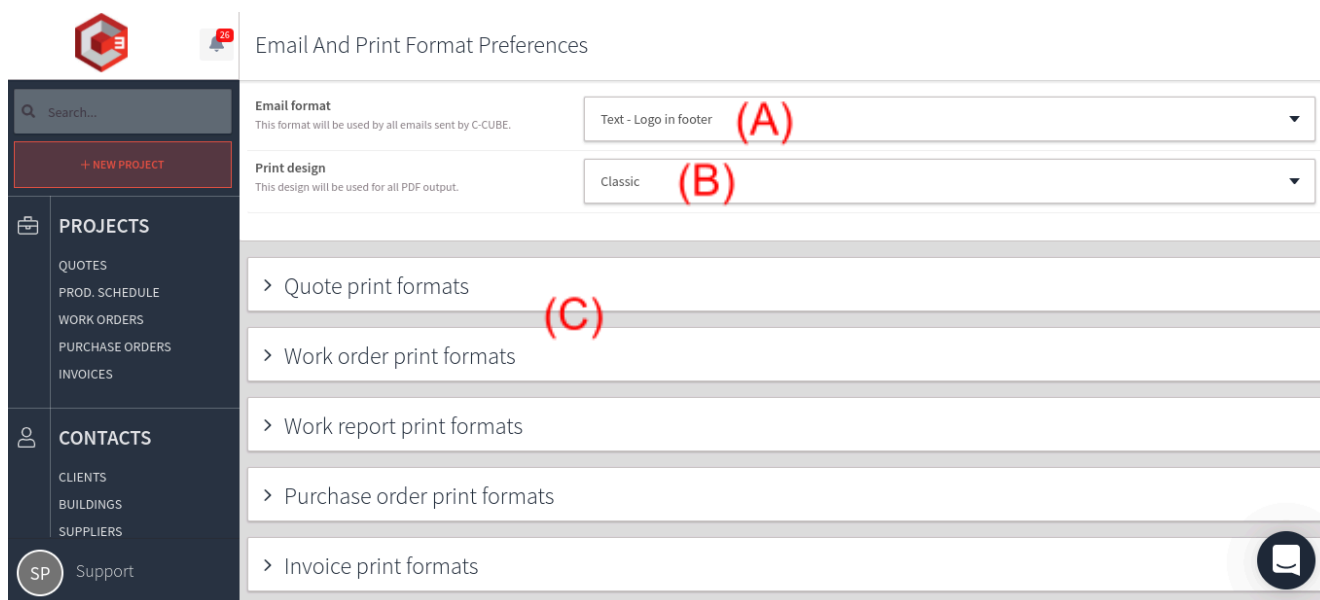
▼ Holidays (F)

Christmas Day	25 Dec 2021	statutory
Boxing Day	26 Dec 2021	statutory
New Year's Day	1 Jan 2022	statutory
Good Friday	15 Apr 2022	statutory
Easter Sunday	17 Apr 2022	statutory
Victoria Day	23 May 2022	statutory
Canada Day	1 Jul 2022	statutory
Labour Day	5 Sep 2022	statutory
Thanksgiving	10 Oct 2022	
Christmas Day	25 Dec 2022	

(F) To add a holiday or a day off, simply click on the + upper right corner. You must then determine the name as well as the start and the end date. Please note that the number of holidays differs depending on where you live.

### 3.2. Email and print formats

All the modifications concerning the display of the documents to be sent can be changed in these preferences.

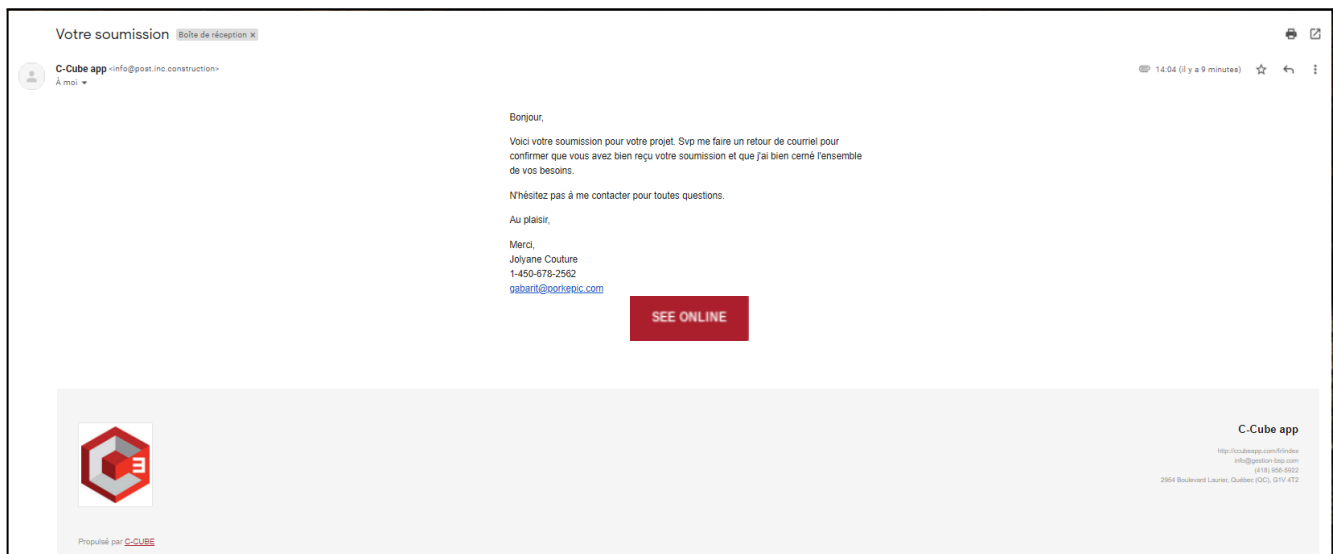


#### 3.2.1. Emails' format

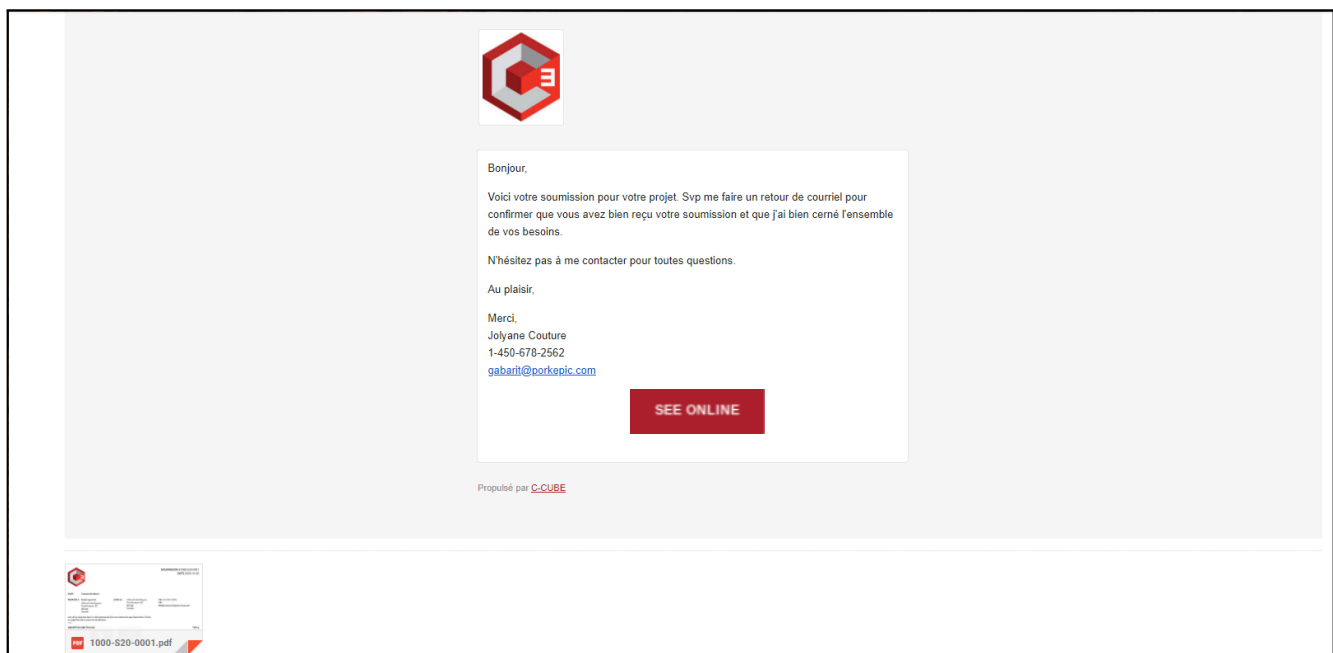
(A) Choose the email format between text (logo at the bottom of the email) and classic (logo in the header). As mentioned on the site, the chosen format is applicable to all emails sent via the C-Cube platform.

#### Text Example





## Classic Example



### 3.2.2. Printing formats

(B) Choose the print design format between classic and modern. As mentioned on the site, the selected design is applicable to all PDF outputs on the C-Cube platform.

## Classic Example



## SOUMISSION #1000-S20-0001

DATE 2020-10-30

SUJET: Travaux de toiture

PROPOSÉ À: David Lapointe  
40 Rue Émile-Despins  
Charlemagne, QC  
J5Z 3L6  
CanadaLIVRÉ AU: 40 Rue Émile-Despins  
Charlemagne, QC  
J5Z 3L6  
CanadaTél. (514) 912-2345  
Tél.  
Email jcouture@gestion-bsp.com

Lors de la visite des lieux il a été entendu de faire une toiture de type élastomère à froid.  
La superficie des travaux est de 250 pica.  
ETC.

## DESCRIPTION DES TRAVAUX

TOTAL

## Toiture plat - Membrane élastomère

- Mobilisation
- Démantèlement de la toiture existante.
- Enlever tout débris du pontage de bois existant.
- Enlever tout débris du tablier d'acier existant.
- Installer apprêt pour pare-vapeur.
- Installer membrane Sopravap'R.
- Installer panneau isolant d'une épaisseur de \_\_\_\_\_" vissé ou collé.
- Raccorder nouveau drains de 3"5/8 avec sous-traitant en plomberie pour raccord intérieur.
- Installer panneau laminée d'une membrane sous-couche à l'aide de colle duotack.
- Installer membrane de finition.
- Installer larmier au périmètre.
- Installer cap de métal sur parapet au périmètre.
- Nettoyer les lieux de tout rebuts.

SOUS TOTAL 3 680,00 \$

TAXE 1 184,00 \$

TAXE 2 367,08 \$

TOTAL 4 231,08 \$

SIGNATURE - C-CUBE APP

SIGNATURE - CLIENT

DATE

SOUMISSION #1000-S20-0001

Initiales

Page 1 / 3



## Modern Example



SALES | PROJECTS | REFERENCES

## C-Cube by Porképic Solutions Inc.

99, rue Arago Est, Québec, Qc G1K 3T8  
6565, Boul. Maricourt, Saint-Hubert, Qc J3Y 1S8  
www.ccubeapp.com | 418 956-5922 | 514  
266-9774

**SOUSSION #1000-S20-0001**

DATE 2020-10-30

**SUJET:**

Travaux de toiture

Lors de la visite des lieux il a été entendu de faire une toiture de type élastomère à froid.  
La superficie des travaux est de 250 pica.  
ETC.

**PROPOSÉ À****David Lapointe**

40 Rue Émile-Despins  
Charlemagne, QC  
J5Z 3L6  
Canada

(514) 912-2345

jcouture@gestion-bsp.com

**LIVRÉ AU**

40 Rue Émile-Despins  
Charlemagne, QC  
J5Z 3L6  
Canada

## DESCRIPTION DES TRAVAUX

TOTAL

Toiture plat - Membrane élastomère

- Mobilisation
- Démantèlement de la toiture existante.
- Enlever tout débris du pontage de bois existant.
- Enlever tout débris du tablier d'acier existant.
- Installer apprêt pour pare-vapeur.
- Installer membrane Sopravap/R.
- Installer panneau isolant d'une épaisseur de \_\_\_\_\_" vissé ou collé.
- Raccorder nouveau drains de 3"5/8 avec sous-traitant en plomberie pour raccord intérieur.
- Installer panneau laminé d'une membrane sous-couche à l'aide de colle duotack.
- Installer membrane de finition.
- Installer larmier au périmètre.
- Installer cap de métal sur parapet au périmètre.
- Nettoyer les lieux de tout rebuts.

<b>SOUS TOTAL</b>	<b>3 680,00 \$</b>
<b>Taxe 1</b>	<b>184,00 \$</b>
<b>Taxe 2</b>	<b>367,08 \$</b>
<b>TOTAL</b>	<b>4 231,08 \$</b>

Signature - C-Cube app

Signature - client

Date

SOUSSION #1000-S20-0001

Initiales

Page 1 / 3

**3.2.3. Printing format according to the files**

Several options are available in order to customize the printing format of six types of documents. It's also possible to create many printing formats for each type of document.



QUOTE Format



SALES | PROJECTS | REFERENCES

ref.

**C-Cube by Porképic Solutions Inc.**

99, rue Arago Est, Québec, Qc G1K 3T8  
6565, Boul. Maricourt, Saint-Hubert, Qc J3Y 1S8  
www.ccubeapp.com | 418 956-5922 | 514  
266-9774

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

Header and footer

Header image

(A)

(B)

Search...

+ NEW PROJECT

PROJECTS

- QUOTES
- PROD. SCHEDULE
- WORK ORDERS
- PURCHASE ORDERS
- INVOICES

CONTACTS

- CLIENTS
- BUILDINGS
- SUPPLIERS

Description (C)

DESCRIPTION DES TRAVAUX

Title of the work description section  
This title shows up before the work description.

YES NO

Show the total price of each section  
Each quote section will be priced.

YES NO

Show material lines  
Shows the description of each material.

YES NO

Show the labor lines  
Shows the description of each labor.

YES NO

Show quantities  
Shows material/labor quantities.

YES NO

Show prices  
Shows the material/labor prices.

(A) Determine the format's name as well as the document's title.

(B) Import the image for the header banner and the image for the footer banner.

(C) Check off the yes or no box according to the company's needs for each option. The description contains different options depending on the type of documents.

### 3.3. Web forms

#### 3.3.1. New form

The web form is posted on the company's website. Customers can fill it out and all the information related to the quote request will be automatically added to the C-Cube platform to start a [new project](#).

To create a new form, click on the + at the top right.

(A) Define the form's name.

(B) Assign the project to an employee to hand over the responsibility.

Once this part is completed, you may determine the form's components.

### 3.3.2. Fields

The fields in this section are obligatory in order to obtain a useful and efficient form.

(C) Be sure to include first name, last name, phone number, email and description of the quote.

### 3.3.3. Other fields

(D) It's also possible to add additional fields by selecting yes or no to the *Show* option. The potential choices are:

- A. The source (How did they hear about you?)
- B. The work type
- C. The property type
- D. The technology type
- E. The downloading files

Note that the initial values can be changed in the [Project Preferences - General](#) section.

### 3.3.4. How to install this form

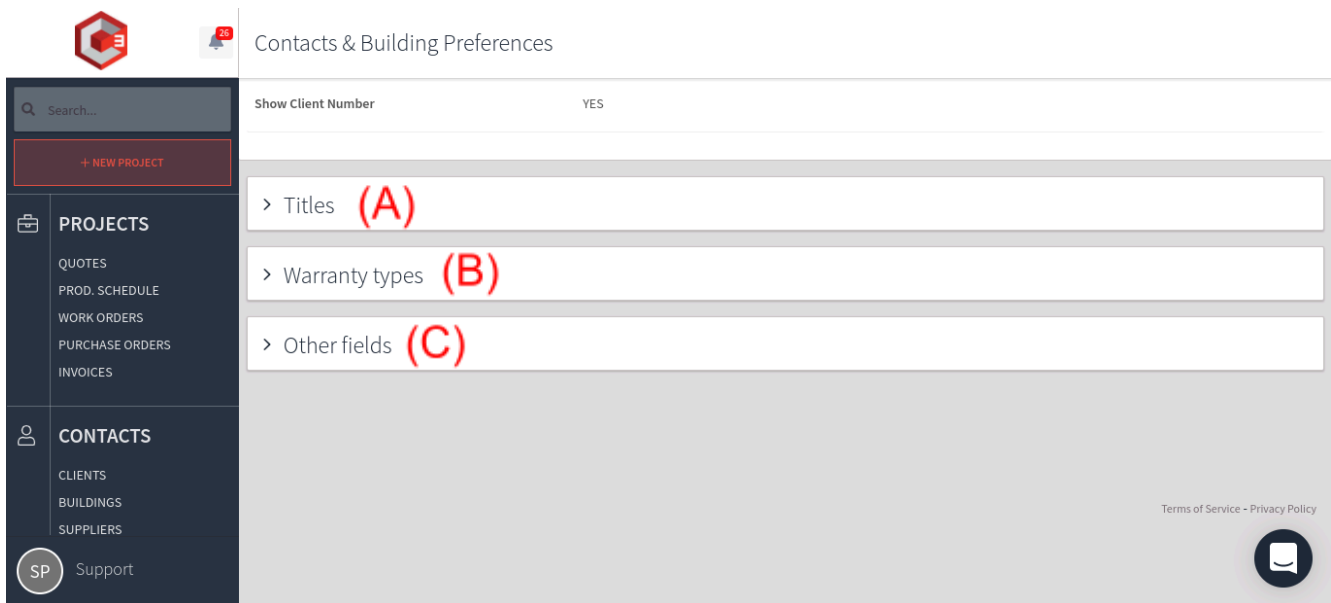
To install this form, you need to know HTML and CSS in order to modify your web page. **We strongly suggest that you contact your website administrator to make the changes.**

(E) Copy this HTML below to the place where you want to display this form.

```
<script id="c-cube-web-form-script"
src="https://demo.inc.construction/web_forms/5.js"></script>
```

### 3.4. Contacts and buildings

It's possible to display the customer's number next to his name.



(A) Select the appropriate title for the client. To create a new one, click on the + on the right.

(B) Select the appropriate warranty type for the client. To create a new one, click on the + on the right.

(C) The *Other Fields* tab allows you to add a new custom cell to the client record. To create a new one, click on the + on the right.

### 3.5. Users' profile

In order to add a user, you must click on the + at the top right. Then, another page appears with all the information to complete to validate the user's file. It's also possible to make a search using filters such as the name of the contact or its creation date.

New User

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

SUPPLIERS

SP

Support

(A)

All fonctionalities

Can assign a specific role

Email support

✓

Access to project, work orders, purchase orders and daily reports only.

Email support

Select this user

Contact record (B)

Contact

Select...

Email

The new user will receive an email to choose a password.

What are its roles? (C)

For more information on roles, please see the [support article](#).

Administrator

Estimator

Coordinator

Customer service

Employee

DEMO

Team lead

(A) Choose the type of user to provide access according to the needs of the position worked.

(B) Complete the contact form by entering the employee's name and email. In addition, the password can also be modified in this tab.

(C) Assign roles for the new user. It's essential to select the roles taking into account that they modify the actions that can be done in the application.

For more information on roles, please refer to the [Roles](#) section.



### 3.6. C-Cube's subscription

It's possible to manage the annual or monthly subscription in this section in order to make changes.

The screenshot shows the 'C-CUBE Subscription' page. On the left is a dark sidebar with a search bar, a '+ NEW PROJECT' button, and menu items under 'PROJECTS' (QUOTES, PROD. SCHEDULE, WORK ORDERS, PURCHASE ORDERS, INVOICES) and 'CONTACTS' (CLIENTS, BUILDINGS, SUPPLIERS). At the bottom of the sidebar is a 'Support' button with an 'SP' icon. The main content area has a header with a notification bell icon and the title 'C-CUBE Subscription'. Below the header are two buttons: 'CHANGE YOUR CREDIT CARD INFORMATION. (A)' and 'CANCEL YOUR SUBSCRIPTION AND CLOSE YOUR ACCOUNT. (B)'. A warning message states: 'You are on an old plan. You can upgrade to a new plan, but you will not be able to come back to your old plan afterward.' Below this are two tabs: 'Annual Payments' (selected) and 'Monthly Payments'. The 'Annual Payments' tab shows two plans: 'PRO PLAN' (Better Quotes) for 45CAD\$ per month (paid annually) and 'BUSINESS PLAN' (Build something solid.) for 110CAD\$ per month (paid annually). Both plans include 1 or 2 users respectively, with an additional user costing +30CAD\$ or +35CAD\$. A 'Simple Sales' label is at the bottom of each plan. A chat icon is visible in the bottom right corner of the main content area.

(A) It's also possible to update your credit card by selecting *Change your credit card information*. It's necessary to validate the billing information and your payment method to complete the update.

### 3.7. Cancel your subscription and close your account

(B) Click on the option *Cancel your subscription and close your account* when you want to cancel your subscription. After closing your account, you will still have access to the application and the information that is registered in it. However it will no longer be possible to add or modify information since you will have read-only access.

#### 4. Text section format

##### 4.1. Markdown

C-Cube uses Markdown for text formatting. It's an easy way to add style to your documents.

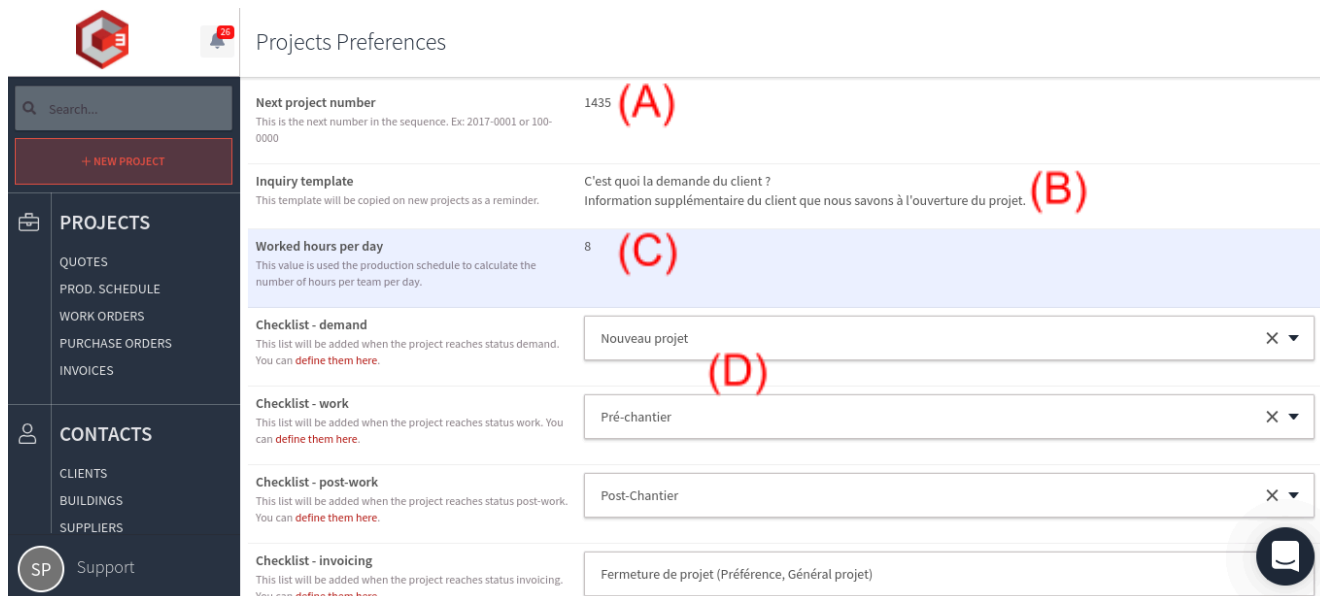
Your text	The result
# Header 1 ## Header 2 ### Header 3	<b>Header 1</b> <b>Header 2</b> <b>Header 3</b>
Hi, I'm <b>**bold*</b> and <i>*italic*</i> and even <del>~~strikethrough~~</del> .	Hi, I'm <b>bold</b> and <i>italic</i> and even <del>strikethrough</del> .
Here is a [link](www.google.com).	Here is a <a href="#">link</a> .
- item - item - item	<ul style="list-style-type: none"><li>• item</li><li>• item</li><li>• item</li></ul>
1. item 1. item 1. item	<ol style="list-style-type: none"><li>1. item</li><li>2. item</li><li>3. item</li></ol>
To make a line break, put 2 spaces at the end of the line. My name <space><space> My phone number	My name My phone number

## 5. Projects preferences

This section contains the modifications that can be made to the project information whether it's related to [general information](#), [quotes](#), [purchase orders](#), [invoicing](#), [materials](#), [assemblies](#), [quickworks](#) or [checklists](#).

### 5.1. General

This section provides access to all the editing options related to a project. It helps notably to structure the display of information, quantify the daily work time, establish checklists according to the time of the day and much more.



(A) Choose the next project number according to the desired sequence.

(B) Create an inquiry template.

It will be copied on all new projects. It's a memory aid of questions or relevant information to ask the client during the project evaluation.

(C) Determine the number of hours worked per day. This refers to the production schedule, which allows you to calculate the number of hours per shift per day.

(D) [Checklists](#) are added to the project according to the project's progress status. Several checklist configurations can be programmed depending on your needs.

Thereafter, other possibilities are available to you. It's possible to modify:

Projects Preferences

Search...

+ NEW PROJECT

**PROJECTS**

- QUOTES
- PROD. SCHEDULE
- WORK ORDERS
- PURCHASE ORDERS
- INVOICES

**CONTACTS**

- CLIENTS
- BUILDINGS
- SUPPLIERS

**CONTACTS**

- QUOTES
- PROD. SCHEDULE
- WORK ORDERS
- PURCHASE ORDERS
- INVOICES

> Sources (E)

> Work types (F)

> Technologies (G)

> Property types (H)

> Communication statuses (I)

> Trades (J)

> Rates (K)

> Units (L)

> Material calculation variables (M)

> Other fields (N)

(E) Sources of new requests (website, business cards, GoQuotes, telephone directory, etc.)

(F) Types of work (renovation, new construction, etc...)

(G) Technologies related to the type of work you have to do (example for roofing: asphalt, elastomer, shingles, etc...)

(H) Types of property (house, condo, duplex, commercial, etc...)

(I) The communication status, on the other hand, is used to categorize the projects [in demand](#).

(J) Trades allow you to categorize the types of trades when submitting and also allow you to have different rates. Each trade can have a different rate. It's possible to make trades by learning level.

(K) Rates are used to calculate quotes. When compared, the cost rate and the selling rate are used to obtain the [project margin](#).

(L) Units (unit, package, roll, etc.) They are used for [materials](#).

(M) Material calculation variables (surface, length, volume, etc.) They are used to make calculations in [assemblies](#).

(N) The *Other fields* section brings the possibility to add information to the categorized project according to each of the added sections. An example could be a serial number or the model installed. The added field appears in the box at the top containing all the information about the customer and his request in the *More Information* section.

All this information can be used later to extract [reports](#). As you can see, it's possible to modify each section and put them in the desired order.

## 5.2. Quote

This section provides access to all editing options related to a submission.

(A) Choose the next submission number according to the desired sequence.

(B) Define the terms and conditions of the contract. These terms will be used on all your future quotes, however you can change them per quote.

(C) Develop an email template for sending the quote. Note that if you use the %name%, %phone%, %email%, %client% keys, they will be replaced with the estimator's information when sending.

(D) Include a [checklist](#) if needed. This is automatically added when creating a new submission.

(E) Develop a thank you email template; the email is sent automatically.

(F) Define the different options for quote reminders.

- Select if you wish to have automatic reminders added to the quote requests.
- Define the subject of the email. It will be applied to all reminders sent.
- Choose the number of reminders you want. There is a possibility of three in total. It's not obligatory to have three. Also, it's necessary to indicate after how many days you want the reminder to be sent automatically.
- Enter -1 if there is a reminder you don't wish to have in the box provided.
- Customize the message for each reminder as you please.

### 5.3. Purchase order

All changes for purchase orders are made in this section.

Préférences Bon De Commande

**Email template**

If you use the keys %name%, %telephone%, %email%, %client%, %building%, they will be replaced by the sender's contact informations when creating the email.

Bonjour, (A)

Voici le bon de commande pour le projet au %immeuble%. Svp me faire un retour de courriel pour confirmer que vous avez bien reçu la commande.

N'hésitez pas à me contacter pour toutes questions.

Au plaisir,

Merci,

%nom%

%telephone%

%email%

▼ Delivery types (B)

Pick up atelier

Livraison chantier

Livraison atelier

(A) Define an email template for purchase orders to suppliers. If you use the %name%, %phone%, %email%, %client% keys, they will be replaced by the estimator information when sending.

(B) Create the delivery types to be applied on the purchase orders when sending. (Site delivery, workshop delivery, to take away)

## 5.4. Invoicing

There are six modification options for invoicing including terms, email template and taxes to set.

**Invoice Preferences**

<b>Next quote invoice</b> This is the next number in the sequence. Ex: 2017-0001 or 100-0000	1267 (A)
<b>Invoice Terms</b> Those terms are copied on each invoice.	Payable 30 jours (B)
<b>Email format</b> If you use the keys %name%, %telephone%, %email%, %client%, %building%, they will be replaced by the sender's informations when creating the email.	Bonjour, Voici la facture final pour les travaux exécuté. (C) Merci pour votre confiance %nom% %telephone% %email%
<b>Generate an invoice</b> Automatically generate an invoice when a quote is won.	NO (D)
<b>Email template for past due invoice</b>	Bonjour, (E) ..... Merci pour votre confiance. Au plaisir

**Taxes (F)**

<b>Tax Rate 1</b> The rate of the first sales tax or 0 if not used.	5.0
<b>Tax Name 1</b> Including your tax number	TPS : 784672924 RT0001
<b>Tax Rate 2</b> The rate of the second sales tax or 0 if not used.	9.975
<b>Tax Name 2</b> Including your tax number	TVQ : 122354 4423 TQ0001

(A) Choose the next invoice number according to the desired sequence.

(B) Define the billing terms (payable 30 days, 2/10n30, etc...). These terms will be copied to each invoice.

(C) Determine an email template for the invoices. If you use the keys %name%, %telephone%, %email%, %client%, they will be replaced by the project information when sending.

(D) Click on Yes or No to indicate whether you want to automatically generate an invoice when a submission changes to *Won* status or not.

(E) Determine a collection email template for invoices due. The keys in point B are also applicable to this template in order to insert the customer information.

(F) Specify, on the one hand, the tax rates to be applied, and on the other hand, the names of the taxes. It's important to respect the order of the sales taxes applicable in your area.

For example in Quebec, for Tax Rate 1, write 5.0 while for Tax Rate 2, write 9.975. As for the name of the taxes, simply enter either GST or QST in the appropriate box. You can also integrate your tax numbers after the name of the tax concerned.

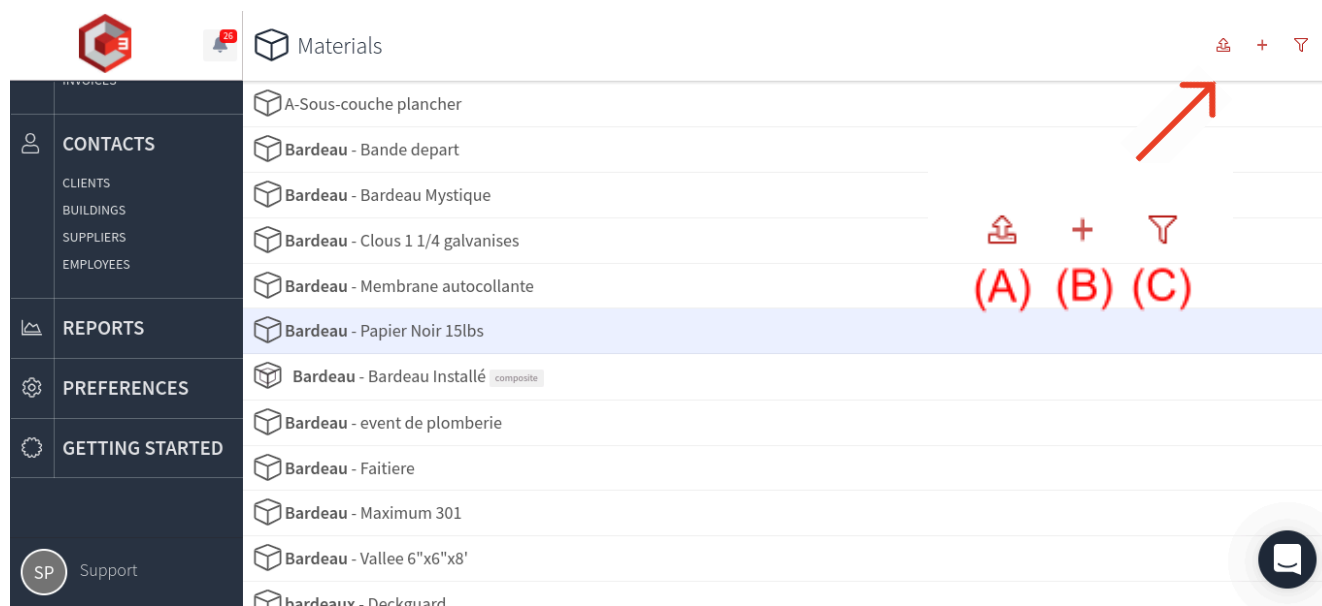
## 5.5. Materials

These preferences allow you to add the entire list of materials needed to complete the work being done. This list of materials is used for [quotes](#), [invoices](#), [purchase orders](#), [work orders](#) and [assemblies](#). It's also convenient to organize it according to your needs.

Then you can export and re-import it to update the material prices using an Excel file. Simply assign the following headings in order for the columns in your table.

**Name\*, Cost price\*, Sell price\*, Unit\*, Category, Supplier, Code, Note, Surface, Length, Box, Width, Tube, Volume, Decimal area**

Please note that columns with an \* are obligatory.



(A) Import your list of materials by clicking on the arrow at the top right, select the document to import, then click on *Import*.



(C) Apply the *Category contains*, *Name contains* and *Supplier* filters to perform a more in-depth search.

A material is simply one that is sold and purchased as it's offered in stores.

(A) Define the name of the material.

- (B) Enter the product code related to your supplier.
- (C) Specify the category according to the supplier's directory.
- (D) Identify the supplier to use. To add one, please refer to the [New supplier](#) section.
- (E) Indicate the number of materials currently in inventory.
- (F) Choose the unit applicable to the composite material in question (unit, package, roll, etc.).
- (G) Specify the cost price as well as the selling price.

There is also a *Notes* section to add relevant information and/or comments. Note that point H to point N are to be completed only if you intend to use the [assemblies](#).

- (H) Enter the area covered per unit.
- (I) Indicate the length of the material used.
- (J) Mention how many units there are per box.
- (K) Indicate the width of the material used.
- (L) Mention how much product per tube or the number of tubes per box, if necessary, depending on how the assembly is assembled.
- (M) Enter the volume covered per unit.
- (N) Enter the decimal area covered per unit according to the type of material. Area in feet or inches.

## Composite material

A composite material is made of several materials and/or time rates. The classic example is to include the material and its installation time in the same composite material.

The screenshot shows the 'New Material' form in the C-Cube application. The form is divided into several sections:

- Name:** A text input field labeled (A).
- Code:** A text input field labeled (B).
- Category:** A dropdown menu labeled (C).
- Unit:** A dropdown menu labeled (D).
- Note:** A text area labeled (E).
- Composition:** A section labeled (F) containing a 'Format' button and a text area for the composition factor.

The sidebar on the left contains navigation links for PROJECTS, CONTACTS, and Support. The 'Support' link is highlighted with a 'SP' icon.

(A) Define the name of the composite material.

(B) Enter the product code related to your supplier.

(C) Specify the category according to the supplier's directory.

(D) Choose the unit applicable to the composite material in question (unit, package, roll, etc.).

(E) Add notes as needed.

(F) Specify the hourly rate and the material to be used by clicking on their respective buttons. An option named *Composition Factor* is to be filled in.

Note: Use the composition factor to convert the unit of the material or rate into the unit of the composite material. For example, if the unit of the composite is 1 sq. ft. and a worker can install 1 sq. ft. per minute, then the composition factor would be 1/60 or 0.017.

## 5.6. Assemblies

An assembly allows you to make estimation calculations on your quotes. You can calculate materials or hours as well.

To create a new assembly, press the + in the upper right corner. It's possible to test the result before saving it by clicking on the *Test* button at the top right. Next to it there is an option to change the name of the assembly.

(A) Choose the name of the assemblée.

(B) Determine which inputs to include.

The inputs are available variables that include all the data necessary to perform the formulas. (Exp: area to be covered, percentage of loss, materials used, etc...)

You have to define:

- The name of the entry
- The type of the input (number, material, time)
- The predefined value

(C) Establish the formulas using the previously created variables and the following functions.

**cos(x) tan(x) asin(x) acos(x) atan(x) sinh(x) cosh(x) tanh(x) asinh(x) acosh(x) atanh(x) sqrt(x) log(x) abs(x) ceil(x) floor(x) round(x) trunc(x) exp(x)**

You have to define:

- The name of the formula
- The calculation

### Wood floor example

To be determined

- How many packages of wood
- How much sub-flooring
- How many nails

Thus, you must use the following formulas.

Wood Packages = Area to be covered / Floor Area

Subfloor = Area to cover / Subfloor Area

Box of nails = (Area to be covered \* Number of nails covering 1sq.ft.) / Number of nails per box

(D) Specify the outgoing materials to be used for the calculation.

You have to define:

- The incoming material
- The calculated quantity

### Test result - wood floor example\*

#### Apply assembly




surface a couvrir

2000

plancher

planche a brique

#### Results

 10 rouleau A-Sous-couche plancher × \$ 20.35	\$ 203.50
 2000 pi gouttiere - planche a brique × \$ 5.00	\$ 10 000.00
 16 unitaire Menuiserie - A-Clou plancher × \$ 60.00	\$ 960.00
<b>TOTAL</b>	<b>\$ 11 163.50</b>

\*Note that these are fictitious data

## 5.7. QuickWorks

A QuickWork contains a description, materials, time, etc. Once in place, they help create quotes quickly. The purpose of a QuickWork is to be efficient by not repeating the same input steps from one quote to another. In fact, you only need to create it and then it will be simple to add it to all applicable quotes by pressing *QuickWork* in the *Works* section of a quote. In addition, it calculates all the costs including labor and materials.

Note that assemblies can be integrated into it to facilitate the calculations. It's also possible to link a checklist or to create a new one for Quickwork.

You can also simply create a new section in the quote and use the link *Save as a Quickwork* or press on the + at the top right.

The screenshot shows the 'New QuickWork' form. On the left is a sidebar with a search bar, a '+ NEW PROJECT' button, and a menu with 'PROJECTS' (selected), 'QUOTES', 'PROD. SCHEDULE', 'WORK ORDERS', 'PURCHASE ORDERS', and 'INVOICES'. The main form has a 'Section name' field labeled (A) and a 'Description' field labeled (B). At the bottom right are 'Save' and 'Cancel' buttons.

(A) Establish the name of the section for quotes.

(B) Complete the description by including all the steps of the work to be performed.

### Final result - plain paving stone example

The screenshot shows the 'QuickWork - Pavés Unis' form. The sidebar is identical to the previous screenshot. The main form has a 'Back' button in the top right. The 'Section name' is 'POSE DE PAVÉS UNIS'. The 'Description' field contains the following text: 'Excavation de la zone des travaux sur une profondeur de 16"', 'Ajout d'une membrane géotextile pour stabiliser le lit de gravier', 'Ajout et compactage d'une couche de 12" de gravier 3/4 sur toute la zone', 'Nivellement de la zone avec une pente positive vers la maison', 'Ajout et compactage d'une couche de 2" de poussière de pierre sur toute la zone', 'Installation des pavés selon le motif pré-établie', 'Installation de bordures en plastique sur le périmètre de la zone', and 'Ajouter un sable polymérique entre les pavés pour solidifier la surface'. Below the description is a table with three rows: '2 pi gouttière - soffit déblocage corniche × \$ 4.00' (labeled A) with a cost of \$ 8.00, 'Construction Labrique 25 paquets de béton' (labeled B) with a cost of \$ 0.00, and '25h Menuisier 2 × \$ 60.00' (labeled C) with a cost of \$ 1 500.00. At the bottom, there is a summary bar showing '1 500.00', '0.00', '8.00', and 'SECTION TOTAL 1 508.00'.

(A) Add the materials to be used by pressing the cube at the bottom right.

You have to define:

- The material
- The quantity

(B) Choose the supplier related to the materials used by clicking on the man at the bottom right.

You have to define:

- The description
- The supplier
- The automatic creation of a purchase order

(C) Include completion time based on a pre-set rate for a specific trade.

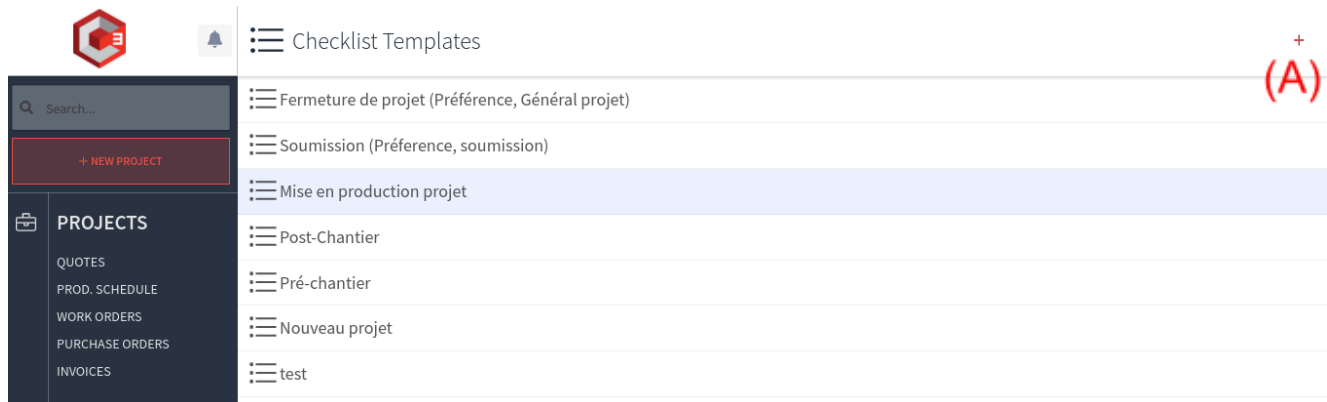
You have to define:

- The rate\*
- The amount of time

\*To create a new rate, please refer to the *Trades* and *Rates* sections in [Project Preferences - General](#).

## 5.8. Checklists

These lists can be quickly copied to a quote or work order section. You can then organize your work into a checklist for your employees on the job site.



(A) Click on the + at the top right to add a new checklist.

(B) Choose an appropriate name.

(C) Add items to the list. These can be new tasks or you can select an existing template to add to the new checklist.

## 5.9. Testimonials and references

### 5.9.1. General

This tab is used to create, if desired, a client satisfaction form for the services received.

(A) Activate customer testimonials if you want to collect feedback on your achievements.

(B) Activate automatic publication of a testimonial when it receives more than three stars.



(C) Determine an email template for the satisfaction survey. In addition, there are 2 reminder options to resend the email. You can also set a number of days for each reminder so that the next email will also be sent automatically.

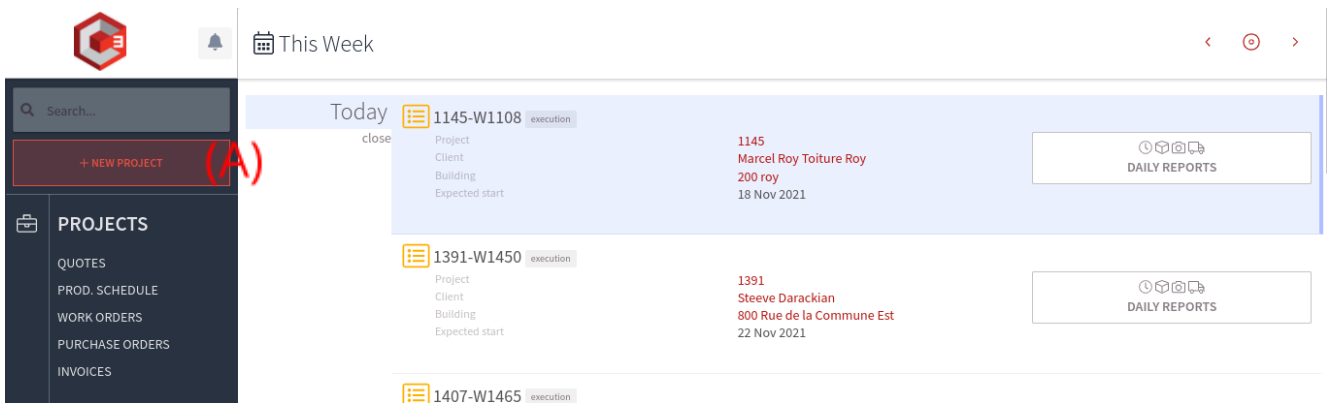
**5.9.2. Testimonials**

When a project is closed, a request for testimonials is sent to your clients. All of these testimonials are found here and are used for emailing purposes.

**6. The opportunities**

**6.1. New project**

The following section details the entire process of integrating data related to a new project. It highlights the opportunities that are related to it by centralizing the information in a digital way.



(A) Click on the red box at the top left +NEW PROJECT to begin.

Afterwards, this interface appears. You must now indicate:

**New Project**  
Create a new client or select an old one. Once you create the project, you will be able add a quote and estimate.

(A) Who is your client?  
Name, phone or address

(B) Where is the work taking place?

(C) What is the project about?

(D) Who manages this project?

(E) > Complementary informations

Create Project

(A) [who is your client](#)

(B) [where is the work taking place](#)

(C) [what is the project about](#)

(D) [who manages this project](#)

(E) [complementary informations](#)

### 6.1.1. Who is your client

It's possible to search among the existing customers in the application. You can also search by name, phone number or even address.

Who is your client?

ja

(A) JJ Jean Jacques - 1023  
1-514-999-5705  
serge@porkepic.com

(B) JG M Jacob Gagnon - ...  
jacob.gagnon@gosoumissions.

YJ Mme Yanick Janelle  
Toitures Couture & ass. Inc.

KW Kanye West - 1109  
1-418-934-6287  
kanye@west.com

You cannot find your client?

Create a new client

- (A) Select the search field for an existing client.
- (B) Select the box of the client in question.
- (C) Click on [Create a new client](#) if needed.

### 6.1.2. Where is the work taking place

When you choose an existing client:

Who is your client?

Jean Jacques - 1023  
1-514-999-5705  
@serge@porkepic.com

Wrong client? [Select another client](#)

Is there a second contact? [Add a contact](#)

Where is the work taking place?

10 Rue Michel  
Beloeil, QC  
J3G 5L7, Canada  
10 Rue Michel

Wrong building? [Select another building](#)

- (A) The building associated with this client appears automatically.
- (B) Choose another building if your client has more than one address.
- (C) Create a new building if it doesn't already exist.

Where is the work taking place?

2314

No buildings.

You cannot find the building? [Create a new building](#)

- (D) There are two options for creating a new building in a client's file.

## For a new customer

Click on *Create a new building* and enter the address in the space provided. When you click on *Select another building*, you arrive in a new section. It's then possible to [Create a new building](#).

## For an existing customer

Click on *Select another building*, enter the address in the space provided, and then click on the [Create a new building](#) link.

### 6.1.3. What is the project about

The screenshot shows the 'What is the project about' form. On the left is a dark sidebar with a search bar, a '+ NEW PROJECT' button, and two main sections: 'PROJECTS' (with links for QUOTES, PROD. SCHEDULE, WORK ORDERS, PURCHASE ORDERS, and INVOICES) and 'CONTACTS' (with links for CLIENTS, BUILDINGS, and SUPPLIERS). At the bottom of the sidebar is a user profile for 'SP Support'. The main content area has a title 'What is the project about?' and a large text input field labeled (A) containing the text 'C'est quoi la demande du client ?' and 'Information supplémentaire du client que nous savons à l'ouverture du projet.' labeled (B). Below this is a 'Format' button. Further down is a section titled 'Who manages this project?' with three dropdown menus: 'Manager' (labeled (C) and showing 'Support Porképic'), 'Estimator' (labeled (D) and showing 'Select...'), and 'Also Notify' (labeled (E) and showing 'Select...'). A chat icon is visible in the bottom right corner.

(A) The details of the project can be summarized to determine the scope of the work to be performed.

(B) The questions that appear in this section are editable and configurable in the [general project preferences](#).

You can also insert a text as a memory aid.

#### 6.1.4. Who manages this project

(C) Identify the employee responsible for the project. Remember that the responsible person is the one who creates the project. It's possible to make a modification for the project manager or the project director.

(D) Enter an estimator.

(E) If you wish to register a third party for the project, then *Also Notify* is the place to do so. This person will receive the project notifications in the same way as the responsible person and the estimator. In order to add people, they must first be created in the [Employees](#) section.

#### 6.1.5. Complementary informations

Additional project information is used to categorize the project. All the information displayed in this section is customizable in the [General project preferences](#).

Complementary informations

Building Section (A)

Source (B)

Work Type (C)

Property Type (D)

Technology (E)

**Work**

Quote by (F)

Follow up date (G)

Work start (H)

Work end (I)

Create Project (J)

A) Specify the section of the building where the work is to be done.

B) Enunciate the sources from which the new requests come (website, business cards, GoSoumissions, yellow pages, etc.).

- (C) Enter the type of work (repair, renovation, expansion, etc...).
- (D) Indicate the type of property (condo, house, bungalow, etc...).
- (E) Define the technology (for roofing: asphalt, elastomer, shingles, etc...).

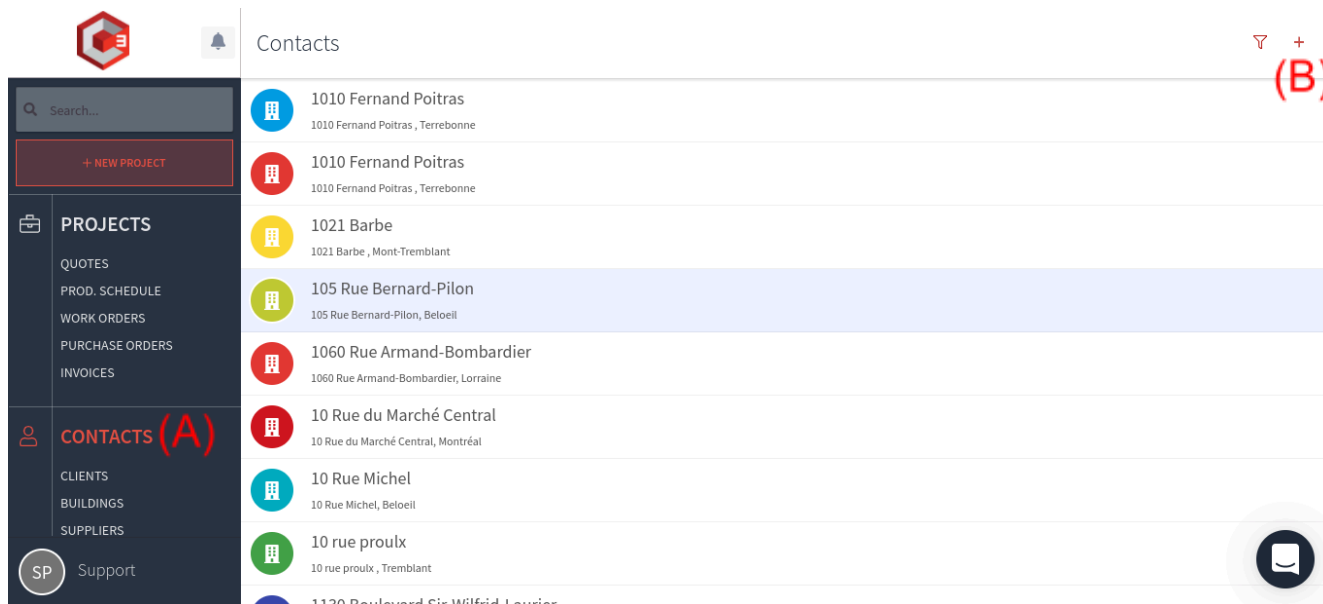
At the end of the week, month or year, a [report](#) can be generated.

- (F) Indicate the date by which the quote must be sent.
- (G) Mention the follow-up date, if you want a follow-up on the project. This automatically creates a [follow-up](#) in the project activities.
- (H) Enter a desired start date for the work.
- (I) Add the desired ending if the information is known.
- (J) Press *Create Project* to finish creating a new project.

You are now in the [project](#) interface.

## 6.2. Contacts

### 6.2.1. New contact



- (A) Establish a new contact in the new project interface or by clicking on *Contacts*.

(B) Click on the + at the top right. Then you have to choose between a contact or a company. The difference between the two is that there can be several [contacts](#) in the same [company](#).

### 6.2.2. New building

The screenshot shows the 'New building' form. On the left is a sidebar with a search bar and a '+ NEW PROJECT' button. Below this are two main sections: 'PROJECTS' and 'CONTACTS'. The 'CONTACTS' section is active, showing a list of links: 'CLIENTS', 'BUILDINGS' (annotated with (A)), and 'SUPPLIERS'. The main form area has a 'Name' field (annotated with (B)), a 'Street' field, and a 'City' field. Below these are 'Postal Code/ZIP' and 'Country' fields. The 'Owner' field is a dropdown menu (annotated with (C)). Below the 'Owner' field is a 'More information' section (annotated with (D)) with a '+ Add a field' button. At the bottom right, there is a 'Save' button and a chat icon.

(A) Create a new building in the *Buildings* section and click on the + at the top right.

(B) Name the building and/or enter the address.

(C) Enter the owner of this building.

(D) Add information in the *More Information* section. They can be set up in the [Contact & Buildings](#) preferences.

### 6.2.3. New supplier/client

All changes to the supplier and customer requirements can be found below.

The screenshot shows the 'New supplier/client' form in the C-Cube application. The form is divided into several sections:

- Header:** Includes the C-Cube logo and a notification bell icon.
- Left Sidebar:** Contains a search bar and a list of navigation items: PROJECTS, QUOTES, PROD. SCHEDULE, WORK ORDERS, PURCHASE ORDERS, INVOICES, CONTACTS, CLIENTS, and BUILDINGS.
- Main Form:**
  - Company Information:** Includes a dropdown menu for selecting a company (labeled (A)), a text field for the company name (labeled (B)), and a text field for the client number (labeled (C)).
  - Project Details:** Includes a logo upload field (labeled (D)) and a category selection field (labeled (E)) with options for 'supplier' and 'client'.
  - Additional Information:** Includes a section for adding additional information (labeled (F)) with a '+ Add a field' button.
- Footer:** Includes 'Save' and 'Cancel' buttons.

(A) For *Company*, several men appear at the top of the interface.

(B) Enter the name of the company.

(C) Designate the customer number for referencing to an accounting system when exporting information.

(D) Join a logo if applicable.

(E) Indicate if it's a supplier, a subcontractor or a customer.

(F) Add additional information. It's necessary to add the fields beforehand in the [general project preferences](#) in order to have access to them in this section.



## 6.2.4. New Contact / Employee / Supplier / Client

It's important to enter all the contact information in order to have all the data centralized in one place.

The screenshot shows the 'New Contact' form in the C-Cube application. The sidebar on the left contains a search bar, a '+ NEW PROJECT' button, and a list of navigation items: PROJECTS (with sub-items: QUOTES, PROD. SCHEDULE, WORK ORDERS, PURCHASE ORDERS, INVOICES), CONTACTS (with sub-items: CLIENTS, BUILDINGS, SUPPLIERS), and REPORTS. The main form area has the following fields and annotations:

- (A) Title dropdown menu
- (B) First Name text input
- (C) Last Name text input
- (D) Title text input
- (E) Client Number text input
- (F) Company dropdown menu (labeled 'Select...')
- (G) Description text input
- (H) Photo upload button (labeled 'Photo')
- (I) Categories section with buttons: contact, employee, supplier, client (the 'client' button is highlighted)
- (J) '+ Add a field' button under the 'More information' section

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

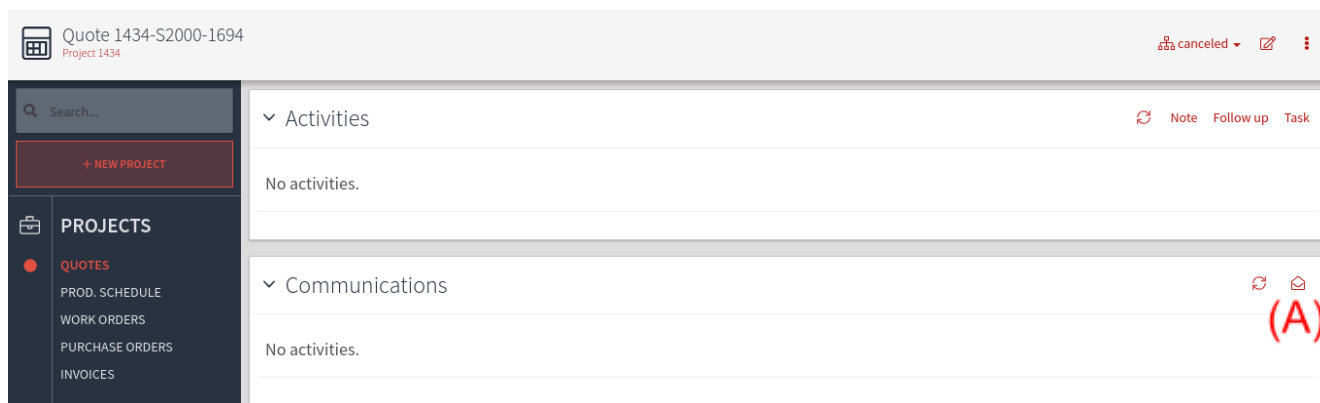
- (A) Select the name of the contact.
- (B) Enter the name of the contact.
- (C) Enter the first name of the contact.
- (D) Indicate the title of the workstation.
- (E) Mention the customer number (for reference to the accounting system).
- (F) Write the company he works for.
- (G) Include a description if necessary.
- (H) Add a contact photo if you wish.

(I) Choose the category of the contact. It allows the contact to be tracked in the right section, whether it's a contact, employee (of our company), supplier or customer.

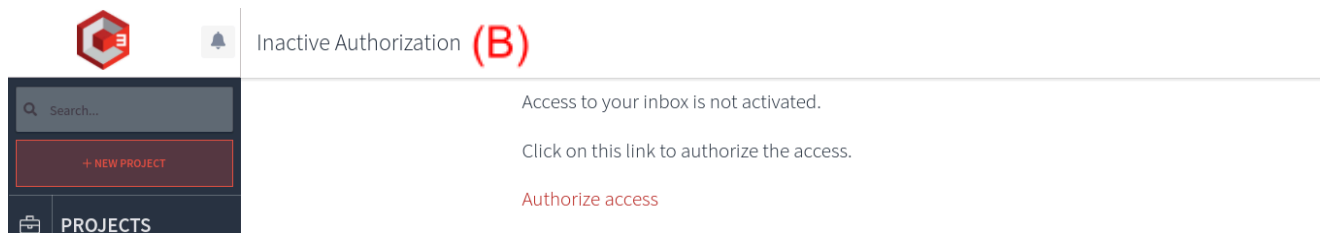
(J) Add additional information in the *More information* section. They can be set up in the [Contact & Buildings](#) preferences.

### 6.2.5. Email account link

C-Cube's platform allows you to integrate a connection with your email account to obtain all the details of the emails sent in the *Customer Tracking* section in a quote.



(A) Click on the envelope on the right.



(B) Authorize access by following the steps to integrate your Google Account into the interface.

### 6.2.6. Filters

To access the filters, click on the small funnel at the top right. Then, the possible filters appear according to the section you are in. In addition, an advanced search can be done using the subsequent filters.

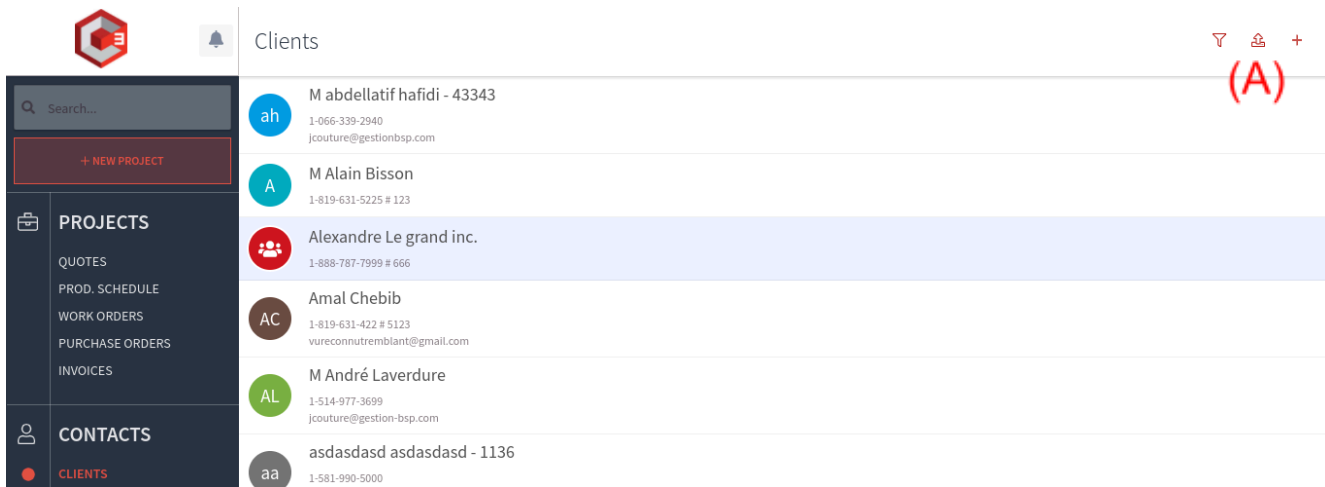
The screenshot displays the 'Contacts' section of the C-Cube application. On the left is a sidebar with navigation options: PROJECTS, QUOTES, PROD. SCHEDULE, WORK ORDERS, PURCHASE ORDERS, INVOICES, CONTACTS (selected), CLIENTS, and BUILDINGS. The main area shows a list of contacts, each with a colored icon and address. On the right, a 'Filtres' sidebar is open, showing 'Sort by' (Created at, Name), 'Name' (text input), 'Type' (dropdown menu), 'Subtype' (dropdown menu), and 'Export' (To Excel button). Red annotations (A), (B), (C), and (D) point to specific elements in the contact list.

Icon	Name	Address
Blue building	1010 Fernand Poitras	1010 Fernand Poitras, Terrebonne
Red building	1010 Fernand Poitras	1010 Fernand Poitras, Terrebonne
Yellow building	1021 Barbe	1021 Barbe, Mont-Tremblant
Green building	105 Rue Bernard-Pilon	105 Rue Bernard-Pilon, Beloeil
Red building	1060 Rue Armand-Bombardier	1060 Rue Armand-Bombardier, Lorraine
Red building	10 Rue du Marché Central	10 Rue du Marché Central, Montréal
Blue building	10 Rue Michel	10 Rue Michel, Beloeil

- (A) The name
- (B) The type (contact, company, or building)
- (C) The sub-type (supplier, customer or employee)
- (D) Each list obtained after applying a filter can be exported to *Excel*.

### 6.2.7. Import/Export

It's possible to import a list of customers, buildings and suppliers. To ensure that you have the right information when importing, we advise you to export a customer via the [filters](#) and thus have the right information for importing.



(A) Press the icon with the up arrow in the upper right corner next to the funnel.

## 7. Projects

### 7.1. Projects status

There are different project statuses applicable to all the functions available in C-Cube. Here is a complete list for each section below.

#### Request

(possible [communication statuses](#) at this stage)

#### Quote

- Open
- Presented
- Retry
- Won (goes to pre-construction stage, lost, canceled, retry)

#### Pre-construction

##### Purchase order

- Open
- Sent
- Canceled

##### Work order

- Open

- Canceled

## **Construction**

### **Purchase order**

- Receipt

### **Work order**

- Execution
- Verification

## **Post-Construction**

### **Purchase order**

- Costs assigned

### **Work order**

- Closed

### **Invoices**

- Draft
- Sent
- Canceled
- Partial

## **Closed**

### **Invoice**

- Closed

## 7.2. Quotes' list

The screenshot shows the 'Projects' list in the C-Cube software. The interface includes a sidebar menu with options like 'PROJECTS', 'QUOTES', 'PROD. SCHEDULE', 'WORK ORDERS', 'PURCHASE ORDERS', 'INVOICES', 'CONTACTS', 'CLIENTS', 'BUILDINGS', and 'SUPPLIERS'. The main area displays a table of projects with columns for PROJECTS, WON, COSTS, PROFIT, and HOURS. Each project row shows details like Client, Client contact, Building, City, Source, Work type, Building Section, Technology, Go Soumissions, Rénovation, Manager, Estimator, Also Notify, Follow up date, and Quote by. The projects are listed in descending order of creation date.

PROJECTS	WON	COSTS	PROFIT	HOURS
(C) 382	(D) \$ 8 192 689.89	(E) \$ 750 461.25 \$ 4 782 909.77	(F) \$ 7 442 228.64 \$ 3 409 780.12	(G) 5601.25 20463.21
<p>1434 - M Steeve Darackian - 1036 closed (B)</p> <p>Client: Steeve Darackian Client contact: None. Building: Place Taschereau City: Longueuil</p> <p>Source: None. Work type: Rénovation Building Section: None. Technology: None.</p> <p>Go Soumissions: Manager: Jacob Gagnon Rénovation: Estimator: Jacob Gagnon None. Also Notify: None. None. Follow up date: 26 Nov 2021 Quote by: 24 Nov 2021</p>				
<p>1433 - M Steeve Darackian - 1036 lost</p> <p>Client: Steeve Darackian Client contact: None. Building: Place Taschereau City: Longueuil</p> <p>Source: None. Work type: Nouvelle Construction Building Section: None. Technology: Élastomère</p> <p>Go Soumissions: Manager: Support Porkepic Nouvelle Construction: Jolyane Couture None. Also Notify: None. None. Follow up date: 23 Nov 2021 Quote by: 16 Nov 2021</p>				
<p>1432 - M Steeve Darackian - 1036 closed</p> <p>Client: Steeve Darackian Client contact: None. Building: 2954 Boulevard Laurier City: Québec</p> <p>Source: None. Work type: Réfection Building Section: None. Technology: Élastomère</p> <p>Go Soumissions: Manager: Jacob Gagnon Réfection: Estimator: Jacob Gagnon None. Also Notify: None. None. Follow up date: 10 Nov 2021 Quote by: 3 Nov 2021</p>				

(A) Click on Projects in the menu on the left, you will arrive on the list above. It's useful to know that the list appears according to the date of creation of the project from the most recent to the oldest.

(B) Each project status is displayed on the screen. We also see all the information entered when opening the new project.

(C) The number of total open projects.

(D) The total amount of projects marked as won.

(E) The costs related to the projects.

(F) The profits generated by the projects.

(G) The hours worked for all teams.

(H) [Filter](#), if necessary, all this list to extract the relevant information for the management of the company.

### 7.3. Relevant visual information about the project

In the interface of a project, it's essential to know where the information is located.

The screenshot displays the C-Cube project management interface. At the top, the project is identified as 'Project 1421' (A). The client information section (B) lists 'Samuel Racine - 1135' with contact details. The building location (C) is shown as '4 Rue Principale Nord, Amos, QC'. The inquiry form (D) and (E) contains various fields for project details. The 'Next actions' section (F) lists '1 New Meeting', '2 New Quote', and '3 New Follow Up'. The 'Activities' (G) and 'Communications' (H) sections are also visible at the bottom.

(A) The project number.

(B) The name of the client.

(C) The building where the work is performed.

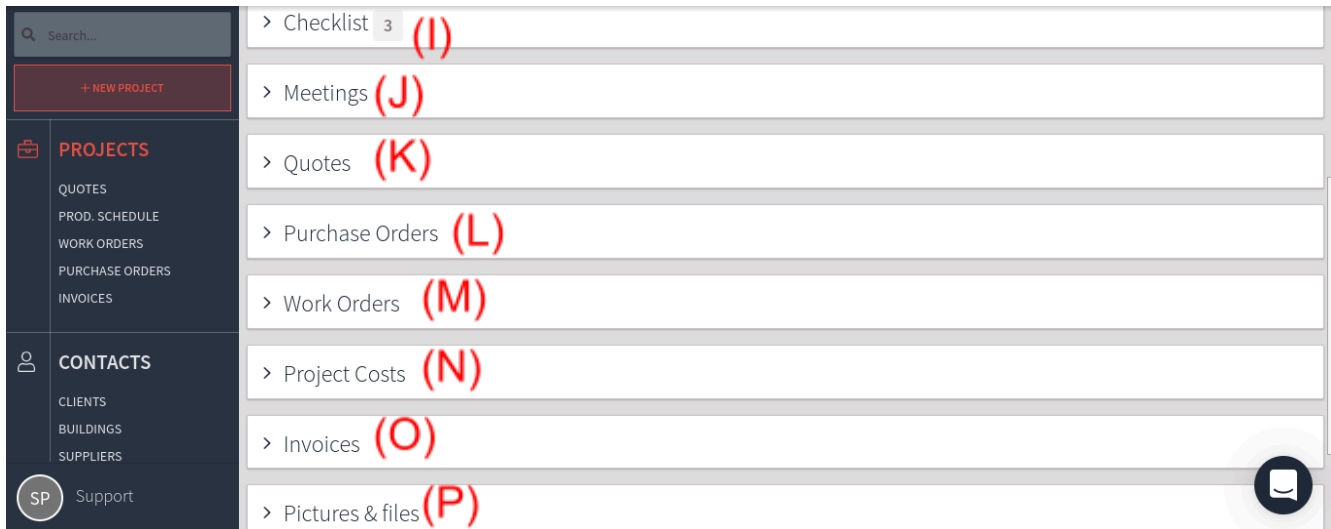
(D) The [status of the project](#).

(E) The [communication statuses](#).

(F) The next actions to be taken on the project.

(G) [Activities](#) (note, follow-up and/or task).

(H) [Communications](#) (client follow-up; includes all emails exchanged for this project).



(I) The [checklist](#).

(J) The [meetings](#).

(K) The [quotes](#).

(L) The [purchase orders](#).

(M) The [work orders](#).

(N) The [project costs](#).

(O) The [invoices](#) related to the project.

(P) The [pictures and files](#) to include.

#### 7.4. Change the client or building of work on a project

If there was an error during the creation and it's necessary to change the building of the work or even the client, it's possible to do it in the project by clicking on the small pencil at the top right.



Project 1674

Client: Paul compagnie - 1179  
No telephones.  
@ paul@paul.com  
principal

Inquiry: C'est quoi la demande du client ?  
Information supplémentaire du client que nous savons à l'ouverture du projet.

test 1234  
test 456

Departement: contract  
Source: None.  
Work type: None.

Next actions: 1 New Meeting, 2 New Quote, 3 New Follow Up

> Activities

> Communications

Email Votre soumission Recipients paul@paul.com, See message

Related to Sent by 1674-S22-1259 Support Porkepic  
Created at 4 Jul 2023 14:24  
Sent at 4 Jul 2023 14:25

> Checklist 3

Whether you want to change the customer on the quotation or even on the invoice, you have to do it for the whole project.

In this section, you can change either the customer or the building.

Project 1674

Number: 1674

Manager: Support Porkepic

Estimator: Select...

Also Notify: Select...

**Client**

Client: Paul compagnie

Client contact: Select...

Building: Select...

**Inquiry**

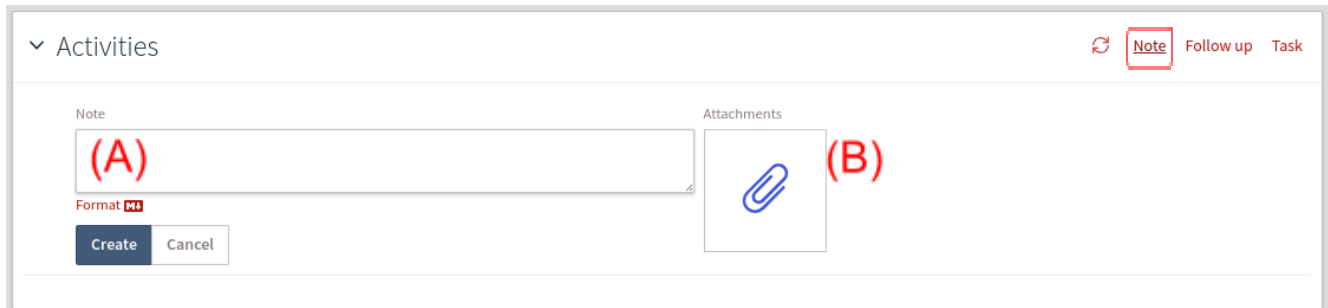
Inquiry: C'est quoi la demande du client ?  
Information supplémentaire du client que nous savons à l'ouverture du projet.

It is possible to modify all project information taken from the initial call.

## 7.5. Activities

In this section, it's possible to leave information related to the project.

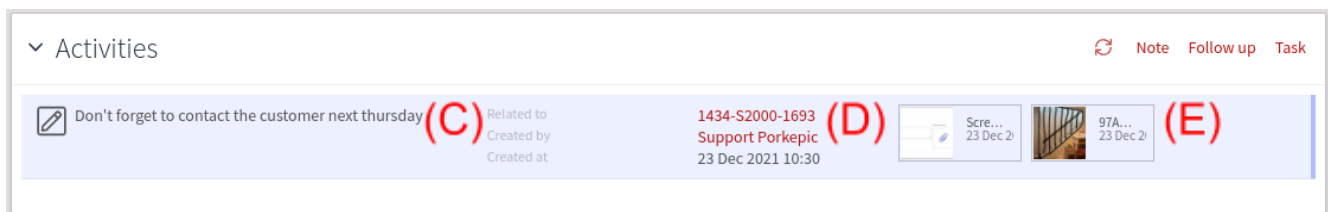
### 7.5.1. Note



The screenshot shows the 'Activities' section with a dropdown menu. In the top right corner, there are three tabs: 'Note' (highlighted with a red box), 'Follow up', and 'Task'. Below the tabs, there are two main areas: 'Note' and 'Attachments'. The 'Note' area contains a text input field with a red '(A)' label, a 'Format' button with a red icon, and 'Create' and 'Cancel' buttons. The 'Attachments' area contains a paperclip icon with a red '(B)' label.

(A) Enter the note in this box.

(B) Attach a file if needed.



The screenshot shows the 'Activities' section with a dropdown menu. In the top right corner, there are three tabs: 'Note', 'Follow up', and 'Task'. Below the tabs, there is a list of activities. The first activity is 'Don't forget to contact the customer next thursday' with a red '(C)' label. To its right, there is a red '(D)' label. Further right, there is a red '(E)' label. The activity is followed by a list of files: '1434-S2000-1693 Support Porkepic 23 Dec 2021 10:30', 'Scre... 23 Dec 2', and '97A... 23 Dec 2'.

(C) Make file categories if necessary.

(D) The person who created the note and the date of creation appears.

(E) Put all the files together.

## 7.5.2. Follow-up

Activities Refresh Note Follow up Task

☐ (A)

Format

Due at

X 30 Dec 2021 (B)

Create Cancel

(C)

(A) Add a description.

(B) Specify a date to receive a follow-up reminder.

(C) Include a file and/or a photo.

Activities Refresh Note Follow up Task

☐ Follow up (D)  
Contact the customer next friday

Related to 1434-S2000-1693  
Due at 31 Dec 2021

97A... 23 Dec 21 SDB... 23 Dec 21

(D) Follow-up information can be found in the *Activities* section.

Activities Refresh Note Follow up Task

☒ Follow up (E)  
Done

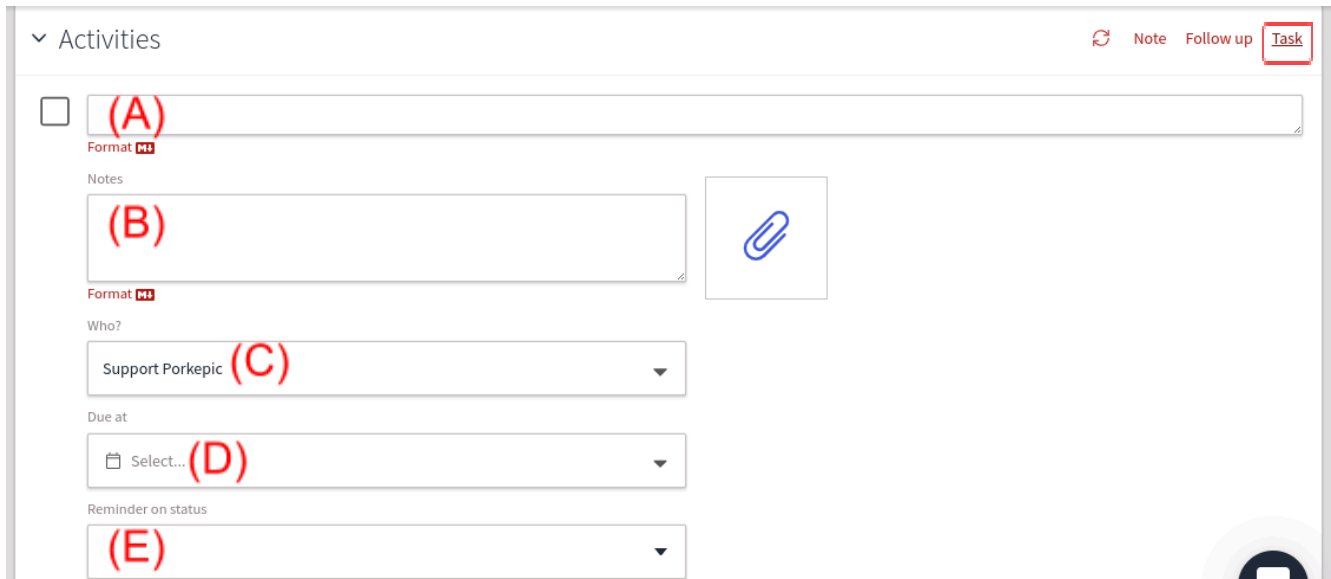
Related to 1434-S2000-1693  
Due at 31 Dec 2021

Completed by Support Porképic  
Completed at 23 Dec 2021 10:39

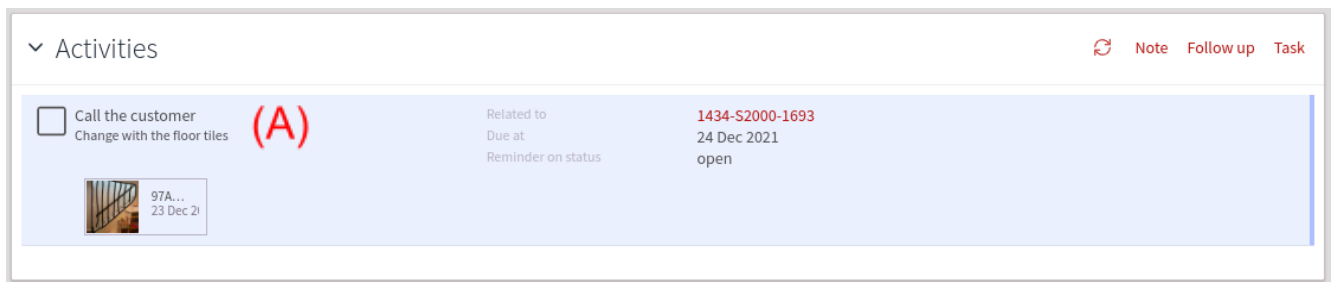
SDB... 23 Dec 21 97A... 23 Dec 21

(E) Complete the follow-up and enter a comment when the follow-up has been done.

### 7.5.3. Task



- (A) Define a title for the task.
- (B) Add a description.
- (C) Assign a person to the task.
- (D) Choose a predefined date.
- (E) Determine a [project status](#) for the reminder.



- (A) Check and enter a comment when the task is completed.

### 7.6. Communication

The *Communications* section allows you to follow up on emails sent via the application, by specifying whether the email has been read or not.

Project 1430

work

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

SUPPLIERS

SP Support

Communications

Email Facture Recipients jcouture@gestion-bsp.com <a href="#">See message</a>	Related to Sent by Created at Sent at Next reminder on	(C) 1258 Support Porkepic 24 Nov 2021 11:30 24 Nov 2021 11:31 24 Dec 2021 Cancel reminder	(D) (E) (F) @ 2
Email Facture Recipients jcouture@gestion-bsp.com <a href="#">See message</a>	Related to Sent by Created at Sent at	1258 Support Porkepic 25 Oct 2021 15:18 25 Oct 2021 15:18	@ 1
Email Commande Recipients jcouture@gestion-bsp.com <a href="#">See message</a>	Related to Sent by Created at Sent at	1430-P1292 Support Porkepic 25 Oct 2021 15:00 25 Oct 2021 15:00	✓ Delivered
Email Merci d'avoir accepté la soumission 1430-S2000-1684 Recipients jcouture@gestion-bsp.com <a href="#">See message</a>	Related to Sent by Created at Sent at	1430-S2000-1684 None. 25 Oct 2021 14:58 25 Oct 2021 14:58	✓ Delivered
Email Votre soumission Recipients jcouture@gestion-bsp.com <a href="#">See message</a>	Related to Sent by Created at Sent at	1430-S2000-1684 Support Porkepic 25 Oct 2021 14:54 25 Oct 2021 14:54	

- (A) What type of email was sent.
- (B) To whom the email was sent.
- (C) To which section of the project the email is linked.
- (D) The creation date and the sending date.
- (E) If a reminder is scheduled and you want to remove it, press *Cancel Reminder*.
- (F) The status of the email (seen, delivered, undelivered or being sent).

The communications appear in the [Quotes](#), [Purchase Orders](#), [Work Orders](#), [Invoices](#) and [Project](#) sections.

## 7.7. Checklist

A checklist allows to follow the progress of the project. It's possible to have a default list on each project or according to the project status. It's possible to change the information of the list in the section [Checklists](#). It's possible to assign the list to the project status in the [General preferences](#).

(A) Determine the name of the checklist.

(B) Assign the activity to a colleague.

(C) Add/import items in the list.

(D) Check the box when an activity in the list is completed.

(E) Modify the checklist.

## 7.8. New request stage

### 7.8.1. Communication status

(A) Communication statuses are used to categorize a new request. This information can be changed in the [General preferences](#).



(A) Click on *New meeting* by following the order of the arrows in the next actions.

(B) Go to the *Meetings* tab for the second option.

Press the + on the right and the window below will appear.

(A) Add a title to your event.

(B) Indicate which employees will be present at the meeting. It's possible to view the agenda of our colleagues if they have been added via the [email link](#).

(C) Enter the date of the meeting and the start time. It's possible to modify the duration of the meeting.

(D) Choose the duration of the meeting.

(E) Write a description to retain information related to the meeting.

It should be noted that a confirmation email for the meeting will be sent to the project client as well as to the employees involved.

## 7.9. Quote stage

The project steps are predefined in the application, but it's not obligatory to do each step.

### 7.9.1. New quote

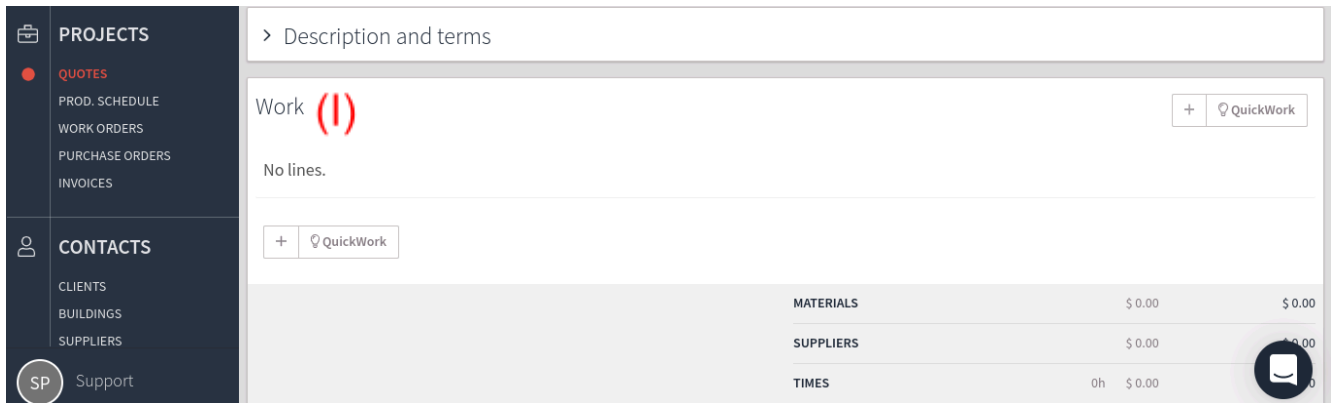
To create a new submission, click on the + in the *Submission* tab.



(A) Select whether you want to create a new quote or duplicate an existing quote.

### 7.9.2. Quote interface

The submission interface includes information about a quote. The interface remains more or less the same as the project but the information is different.



- (A) The project and quote number.
- (B) The client and the building in connection with this quote.
- (C) The details of the quote.
- (D) Enlarge to see all information.
- (E) The [activities](#) of the quote.
- (F) The [communications](#).
- (G) The [checklist](#).
- (H) The [description and terms](#).
- (I) The [works](#).

#### 7.9.2.1. Description and terms

The description and terms section includes all the conditions related to the contract. It allows you to protect yourself by specifying the inclusions and exclusions.

Quote 1420-S2000-1695  
Project 1420

open

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

SUPPLIERS

SP Support

Description and terms

Description (B)

Title (C)

No description.

Terms (A)

None. TERMES ET CONDITIONS DU CONTRAT

Groupe xxxxx. s'engage envers le client à prendre tous les moyens nécessaires afin de réaliser l'ensemble des travaux prévus au contrat dans les meilleurs délais. Il est entendu que Groupe xxxxx Inc. n'est pas responsable pour tout délai, dommage et impossibilité d'exécuter les travaux à ladite adresse pour cause de grève, lock-out, feu, accident, manque de matériaux ou toute autre cause indépendante de sa volonté. Le client peut unilatéralement résilier le contrat tant que la réalisation de l'ouvrage ou la prestation du service n'a été entreprise. Le client s'engage à payer les frais et dépenses engagés, la valeur des travaux exécutés ainsi que la valeur des biens fournis, dont notamment mais non limitativement en préparation (design, architecture, ingénierie) qu'en achat de spécificités nécessaires à l'exécution du présent contrat. Groupe xxxxx Inc. se réserve le droit de résilier unilatéralement le présent contrat suivant tout défaut de paiement du client en vertu du présent contrat ou du refus du client des travaux nécessaires en vertu des règles de l'art, le client assumant ainsi les risques reliés à la résiliation du dit contrat ainsi que les dommages qui peuvent en découler. Groupe xxxxx Inc. s'engage à prendre tous les moyens nécessaires afin d'effectuer les travaux prévus au présent contrat en respect des règles de l'art ainsi qu'à transmettre les recommandations des manufacturiers afin que ceux-ci honorent adéquatement leurs garanties. Ainsi, le client comprend que Groupe xxxxx Inc. ne pas à effectuer des travaux qui ne seraient pas conformes à ces recommandations et comprend qu'il ne peut tenir responsable Groupe xxxxx Inc. De l'exécution desdits travaux et

- (A) Specify the terms and conditions of the contract; it's possible to make them appear on all quotes in the [quote](#) preferences.
- (B) Indicate the description of the quote or introduction.
- (C) Enter the title.
- (D) Modify the terms and conditions.

### 7.9.2.2. Works

The *Work* section allows you to add the detailed description. You must have a description ([new section](#) or [QuickWorks](#)) to be able to add either, [workforce](#), [materials](#), [suppliers or subcontractors](#) or an [assembly](#).

Quote 1420-S2000-1695  
Project 1420

open

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

SUPPLIERS

SP Support

Work 1

(A)

cuisine commerciale

0 Boîte Cloud Paslode 3" 1/4 × \$ 20.00 \$ 0.00

Update this QuickWork

(B)

MATERIALS	\$ 0.00	\$ 0.00
SUPPLIERS	\$ 0.00	\$ 0.00
TIMES	0h \$ 0.00	\$ 0.00
PRICE CHANGES		
REBATE		

(A) Press + for a new section.

(B) Click on *QuickWorks* to select one.

## Example - Flat roof

Quote 1410-S2000-1691  
Project 1410

won

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

SUPPLIERS

SP Support

Toiture plat conventionnelle - Élastomère soprema - Réfection

Superficie : pi2

Bordure de toit : pi lin.

Drain à remplacer : drain(s)

- Mobilisation
- Démantèlement de la toiture existante.

1 rouleau pare-vapeur - pare-vapeur Sopravap × \$ 380.00 \$ 380.00

Soprema Travaux de toiture \$ 0.00

50h Couvreur × \$ 60.00 \$ 3 000.00

\$ 3 000.00	\$ 0.00	\$ 380.00	SECTION TOTAL	\$ 3 380.00
-------------	---------	-----------	---------------	-------------

Assembles history

Update this QuickWork

MATERIALS	\$ 270.00	\$ 380.00
-----------	-----------	-----------

### 7.9.2.2.1. New section

In each section, it's possible to enter the text of your choice. It's also possible to add several sections to form the quote. Each section is calculated separately.

(A) Section to write the text.

(B) Save the text.

Afterwards, it's possible to add the information to calculate the quote.

(C) To add costs to the section ([workforce](#), [materials](#), [suppliers or subcontractors](#) or [assembly](#)).

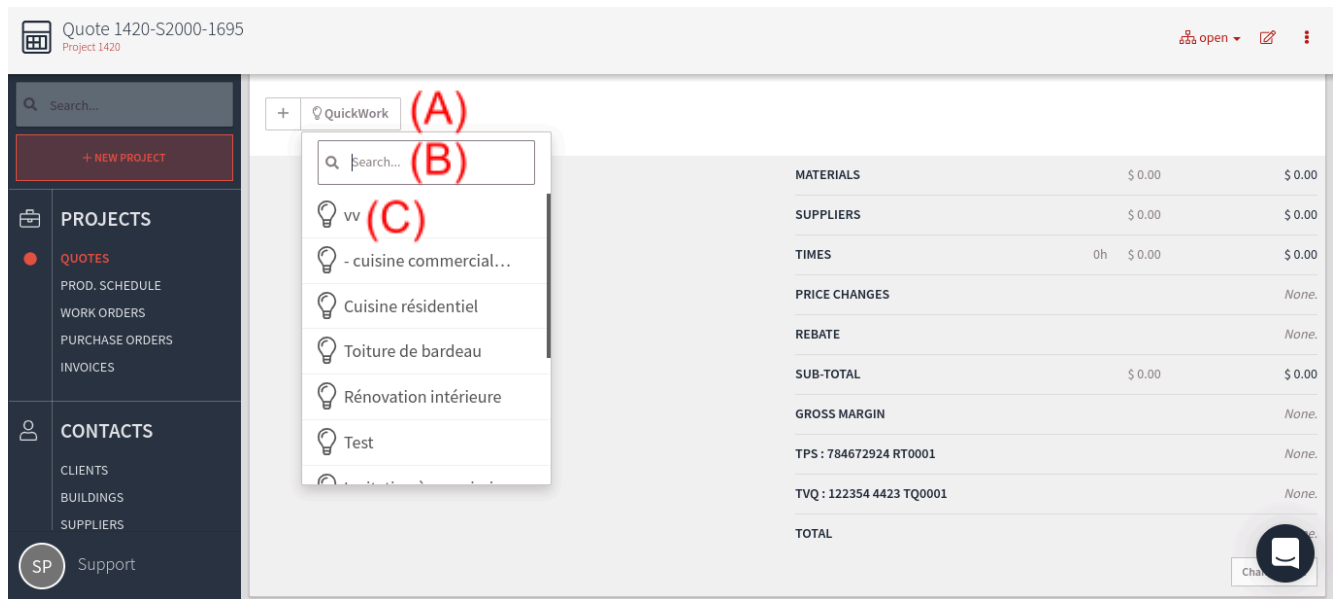
(D) Add a checklist that will appear on the work order if desired.

(E) Press the + or [QuickWorks](#) for a new section.

#### 7.9.2.2.2. QuickWorks

It's possible to save quote templates in the [QuickWorks](#) general preferences.

Adding a Quickworks allows you to predefine the text according to the jobs and to add the materials related to the jobs.



(A) Click on *QuickWorks* to display a list of the last 10.

(B) Do a keyword search.

(C) Select the template to be added by clicking on it.

Once the template is selected, the text appears for that template, along with materials, typical labor and related suppliers.

Quote 1410-S2000-1691  
Project 1410

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

SUPPLIERS

SP Support

Toiture plat conventionnelle - Élastomère sopraema - Réfection (A)

Superficie : pi2

Bordure de toit : pi lin.

Drain à remplacer : drain(s)

- Mobilisation
- Démantèlement de la toiture existante.

1 rouleau pare-vapeur - pare-vapeur Soprapap × \$ 380.00	\$ 380.00
Soprema Travaux de toiture	\$ 0.00
50h Couvreur × \$ 60.00	\$ 3 000.00
\$ 3 000.00	\$ 0.00
\$ 380.00	SECTION TOTAL \$ 3 380.00

Assembles history  
Update this QuickWork

MATERIALS \$ 270.00

(A) Edit the information relevant to this project by clicking on the *QuickWorks*.

Quote 1424-S2000-1690  
Project 1424

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

SUPPLIERS

SP Support

Work 1

Description

Modification de deux chambres de 10' X 10' pour en faire une de 14' x 10' avec walk-in de 6' x 10' :

- Démolir mur séparateur, le gypse sur toute les surfaces, les portes et le plancher et porter au rebut
- Faire un nouveau mur en 2"x4" avec porte
- Refaire configuration électrique (sous-traitant)
- Refaire isolation sur 4 murs
- Installation de panneau de gypse
- Tirage de joint (sous-traitant)
- Installation d'un nouveau plancher en bois franc.
- Pose des plinthes et quart de rond ( finition )
- Peinture

Tables	Are	Cool
col 3 is	right-aligned	\$1600
col 2 is	centered	\$12
zebra stripes	are neat	\$1

Format

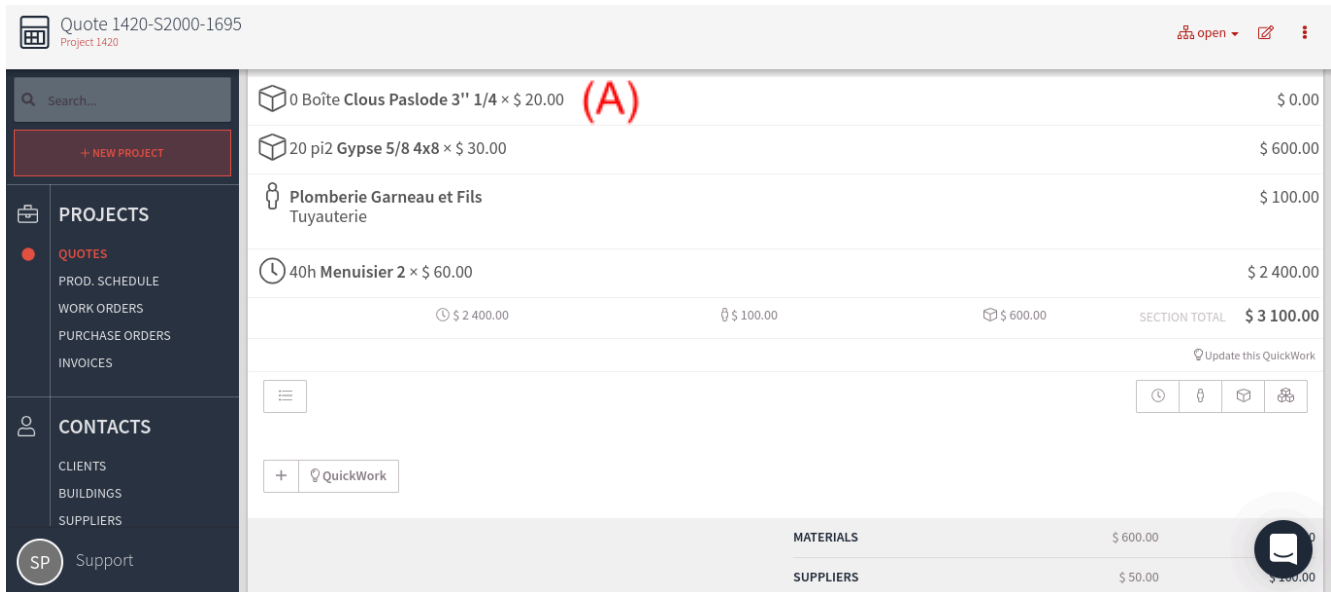
Save

(B) Edit the text as desired when the formatting box appears.

(C) Save to return and add materials, labor and subcontractors or suppliers.

### 7.9.2.2.3. Estimate

To add costs to the quote, it's possible to do so manually by adding [materials](#), [workforce](#) and [suppliers or subcontractors](#). It's also possible to make [assemblies](#).



Quote 1420-S2000-1695  
Project 1420

Search...

+ NEW PROJECT

PROJECTS

- QUOTES
- PROD. SCHEDULE
- WORK ORDERS
- PURCHASE ORDERS
- INVOICES

CONTACTS

- CLIENTS
- BUILDINGS
- SUPPLIERS

SP Support

0 Boîte Clous Paslode 3" 1/4 × \$ 20.00 (A) \$ 0.00

20 pi2 Gypse 5/8 4x8 × \$ 30.00 \$ 600.00

Plomberie Garneau et Fils  
Tuyauterie \$ 100.00

40h Menuisier 2 × \$ 60.00 \$ 2 400.00

\$ 2 400.00 \$ 100.00 \$ 600.00 SECTION TOTAL \$ 3 100.00

Update this QuickWork

+ QuickWork

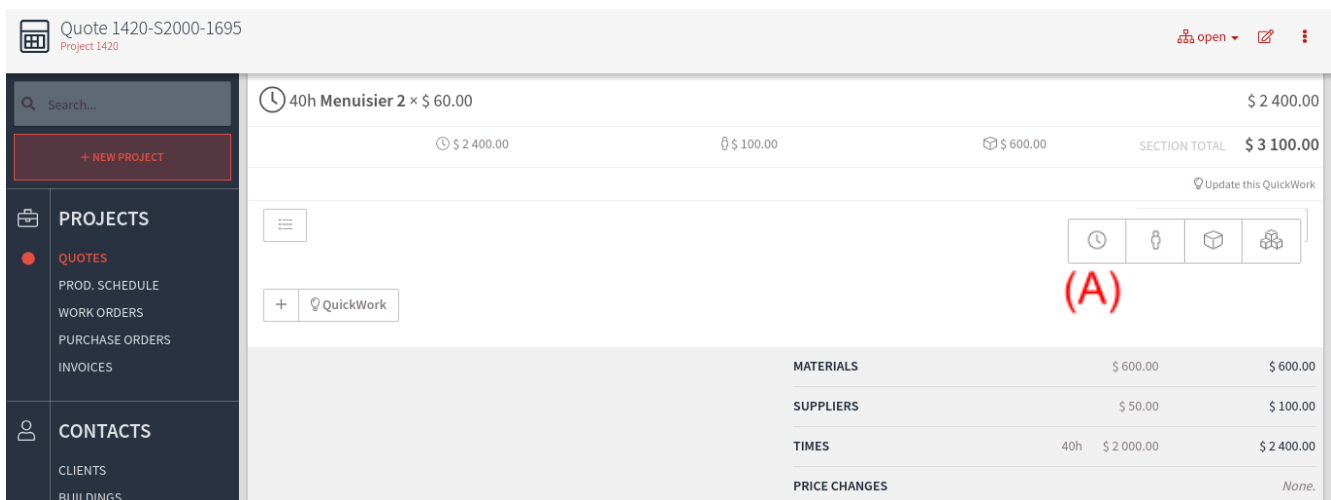
MATERIALS \$ 600.00

SUPPLIERS \$ 50.00

(A) Press the material line to change the quantity.

### 7.9.2.2.3.1. Workforce

It's possible to insert the labor time directly in the *Works* section. The calculation is made according to the rate applied to the chosen trade.



Quote 1420-S2000-1695  
Project 1420

Search...

+ NEW PROJECT

PROJECTS

- QUOTES
- PROD. SCHEDULE
- WORK ORDERS
- PURCHASE ORDERS
- INVOICES

CONTACTS

- CLIENTS
- BUILDINGS

40h Menuisier 2 × \$ 60.00 \$ 2 400.00

\$ 2 400.00 \$ 100.00 \$ 600.00 SECTION TOTAL \$ 3 100.00

Update this QuickWork

+ QuickWork

MATERIALS \$ 600.00 \$ 600.00

SUPPLIERS \$ 50.00 \$ 100.00

TIMES 40h \$ 2 000.00 \$ 2 400.00

PRICE CHANGES None.



(A) Click on the clock to add labor costs to this section of the quote.

(B) Predefine the rates in the [General Preferences](#) if it's not already there.

(C) Include a description to differentiate multiple sections.

(D) Indicate the number of hours required by rate.

(E) Change the cost and selling price, if you have the access.

#### 7.9.2.2.3.2. Materials

To add material costs to this section of the quote.

(A) Press on the small cube.

(B) Select a material from the list of materials. Integrate directly into the quote if you have access, otherwise materials must be added in the [Material Preferences](#).

(C) Add a description.

(D) Determine the quantity needed.

(E) Change the cost and selling price on this section only, if you have access.

(F) Change the price if necessary. If the quote is dated and you know that the price has been changed in the [master list](#). It's possible to click here and the price will be modified on this section of the quote. Note that the price will be modified only for this quote.

### 7.9.2.2.3.3. Suppliers or subcontractors

It's also possible to add suppliers or subcontractors to determine who to send the purchase orders to.

(A) Click on the little man.

**Supplier**

Description (B)

Format

Supplier (C) Search... (D)

Cost (E)

Sell (E)

Create a purchase order?

YES NO (F)

CANCEL SAVE

- (B) Enter a description or detail regarding the addition of this supplier.
- (C) Select from suppliers or subcontractors.
- (D) Create a new supplier or subcontractor directly in the interface, if you have access.
- (E) Insert the cost and selling price.
- (F) Press yes, if you want a purchase order to be created when the quote is marked as *Won*.

#### 7.9.2.2.4. Assemblies

It's possible to add an assembly in the *Works* section.

Quote 1420-S2000-1695

Project 1420

open

40h Menuisier 2 × \$ 60.00 \$ 2 400.00

\$ 2 400.00 \$ 100.00 \$ 600.00 SECTION TOTAL \$ 3 100.00

Update this QuickWork

+ QuickWork (A)

Item	Quantity	Unit Price	Total Price
MATERIALS		\$ 600.00	\$ 600.00
SUPPLIERS		\$ 50.00	\$ 100.00
TIMES	40h	\$ 2 000.00	\$ 2 400.00
PRICE CHANGES			None.

- (A) Press the three small cubes to choose which assembly to use from the list.

To use assemblies, you must create them in advance in the [Assembly preferences](#). Assemblies allow you to predefine the calculations for a type of work. It's possible to set up an assembly according to your needs.

Apply assembly

Assembly

(B)

Démolition

Démolition

Fondation de béton

General - Paint

General - Plancher de bois

General - Vitre

Nouveau mur montant de bois

\$ 2 400.00

SECTION TOTAL \$ 3 100.00

Update this QuickWork

0.00 \$ 600.00

(B) Click on the one to be applied, for example, the Flat Roof - Elastomer assembly.

Then, the questions predefined in the preferences appear. You have to fill in all the information to get the result.

Apply assembly

Assembly

Toiture plat - Élastomère Soprema test

Superficie de la toiture

Membrane pare-vapeur

Panneau isolant laminée sous-couche

Membrane finition

Nombre de drain(s)

Drain (matériel)

Results

TOTAL \$ 0.00

CANCEL SAVE

\$ 100.00

\$ 2 400.00

SECTION TOTAL \$ 3 100.00

Update this QuickWork

0.00 \$ 600.00

0.00 \$ 100.00

0.00 \$ 2 400.00

When all the information is completed, the result is displayed. You must click on save to add it to the quote.

## Final result - Flat Roof - Elastomer assembly

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

SUPPLIERS

Apply assembly

Results

2 chaudiere colle - Élastocol Stick 19 litre × \$ 139.85	\$ 279.70
1 rouleau pare-vapeur - pare-vapeur Sopravap × \$ 380.00	\$ 380.00
84 panneau isolant - Soprasmart Iso HD 1/2 3'x8' × \$ 62.00	\$ 5 208.00
4 paquet colle - Duotack (4x1500ml) × \$ 150.00	\$ 600.00
2 paquet Vis - Vis soprafix pre-ass 4" - Installer au 8" (1000/bte) × \$ 440.00	\$ 880.00
Infinity rouleau Membrane - Membrane finition - Soprastar GR sablé × \$ 0.00	\$ 0.00
4 chaudiere colle - Élastocol Stick 19 litre × \$ 139.85	\$ 559.40

CANCEL SAVE

\$ 5 208.00

\$ 0.00

\$ 0.00

\$ 0.00

\$ 380.00

\$ 880.00

Assemblies history

Save as a QuickWork

🕒

🔍

📦

👤

It's possible to apply multiple assemblies to a QuickWorks or in the *Works* area.

### 7.9.2.3. Price adjustment

When all QuickWorks are completed, it's possible to adjust the final quote price.

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

TIMES	40h	\$ 2 000.00	\$ 2 400.00
PRICE CHANGES	None.		
REBATE	None.		
SUB-TOTAL	\$ 8 819.10	\$ 11 007.10	
GROSS MARGIN	19.88 %		
TPS : 784672924 RT0001	\$ 550.36		
TVQ : 122354 4423 TQ0001	\$ 1 097.96		
TOTAL	\$ 12 655.42		

(A) Change price

(A) Press *Change Price*; you will be presented with several choices.

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

Price change & rebates

What price change type do you want?

No price change

Force a total (A)

Force a margin (B)

Force a total all taxes included (C)

Montant d'ajustement (D)

9.10

\$ 0.00

0.00

\$ 100.00

0.00

\$ 2 400.00

None.

None.

9.10

\$ 11 007.10

19.88 %

(A) Force a total; allows you to adjust the amount before taxes.

- (B) Force a margin; allows you to apply a percentage of the desired margin.
- (C) Force a total of all taxes included; allows you to modify the amount with taxes.
- (D) Enter an adjustment amount if needed.

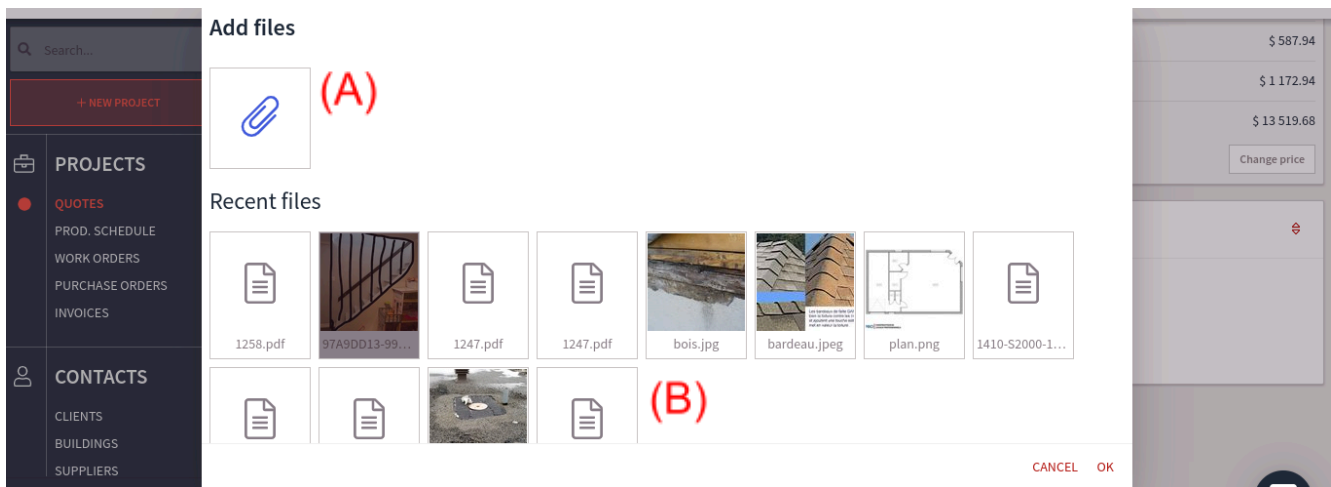
#### Example of forced margin

MATERIALS	\$ 6 769.10	\$ 0.00
SUPPLIERS	\$ 50.00	\$ 100.00
TIMES	40h \$ 2 000.00	\$ 2 400.00
PRICE CHANGES		(A) \$ 751.70
REBATE		None.
SUB-TOTAL	\$ 8 819.10	\$ 11 758.80
GROSS MARGIN		(B) 25 %
TPS : 784672924 RT0001		\$ 587.94

- (A) The total amount of adjustment to achieve the 25% gross margin.
- (B) Gross margin forced to 25%.

#### 7.9.2.4. Photos & files

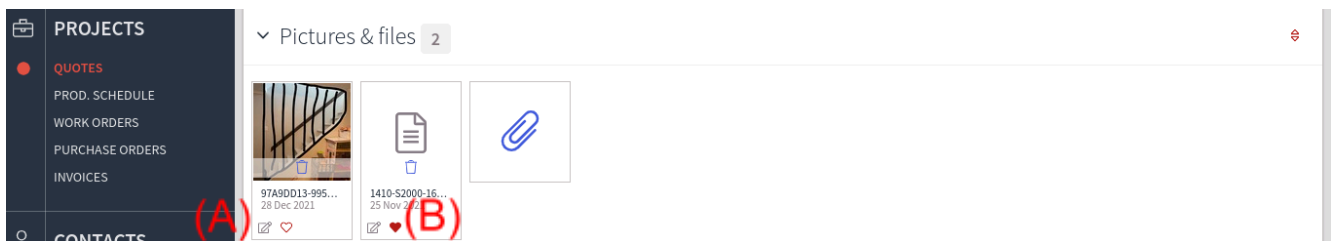
It's possible to include photos and files in a quote. To add them, you can click on the paperclip on a computer or on the camera if you are on a phone.



(A) To select photos or files from your computer.

(B) To select the files recently added to C-Cube.

It's possible to add a caption to the photo.



(A) Set a description to the image by clicking on the small pencil under the photo.

(B) Indicate the selection of photos to put on the quote by pressing the heart.

### 7.9.3. Printing

You can print a PDF of your quote by clicking on the three small dots at the top right.

The screenshot shows the software interface for Project 1420. The top bar includes a search icon, a notification bell, and the project name 'Quote 1420-S2000-1695'. The sidebar on the left has a search bar and navigation links for PROJECTS, QUOTES, CONTACTS, and Support. The main content area is divided into sections for Client, Building, and Details. The Client section shows Samuel Racine's contact information. The Building section shows a map and address. The Details section lists various options like Approval, Quoted hours, and Caution needed. On the right, there is a list of actions: Duplicate, Signature, Soumission (A), Soumission détaillée, Inspection, and Demande de changement. At the bottom right, there is a 'Send (B)' button.

(A) Print the basic quote, the detailed quote, an inspection or a change request.

The possible printouts can be modified in the preferences, [Emails formats and Printing](#).

### 7.9.4. Sending

(B) When you click on send quote, a new window appears. The information for sending the quote is displayed.

The screenshot shows the 'Email quote' form. It has several fields: Subject (Your quote (A)), Recipients (sracine@spektrummedia.com, (B)), From (supports@porkepic.com (C)), Attached PDF (empty field (D)), and Message (Bonjour M., Mme, Samuel Racine, (E)). On the right side, there is a signature field with a green 'Signature' button and a dropdown menu for selecting a signature.

(A) The subject of the email.

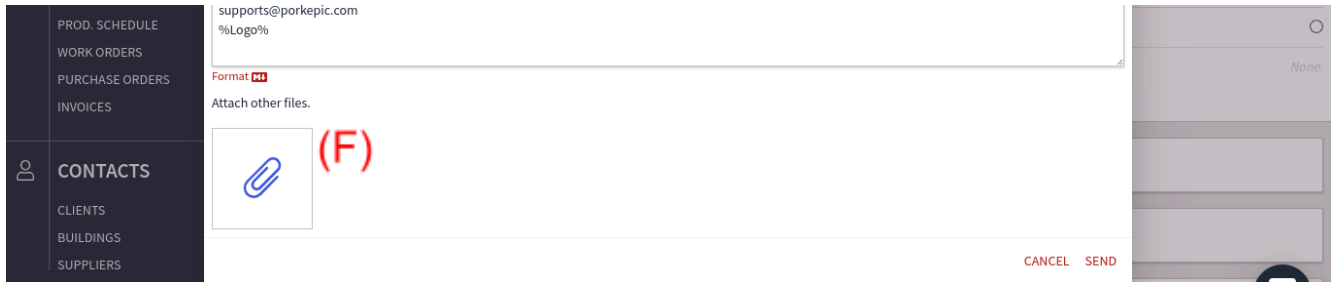
(B) The recipient of the email.



(C) The sender of the email.

(D) The PDF file to be included in the email.

(E) The email message. It's possible to edit the predefined message in the [Preferences Quotes - Email Template](#).

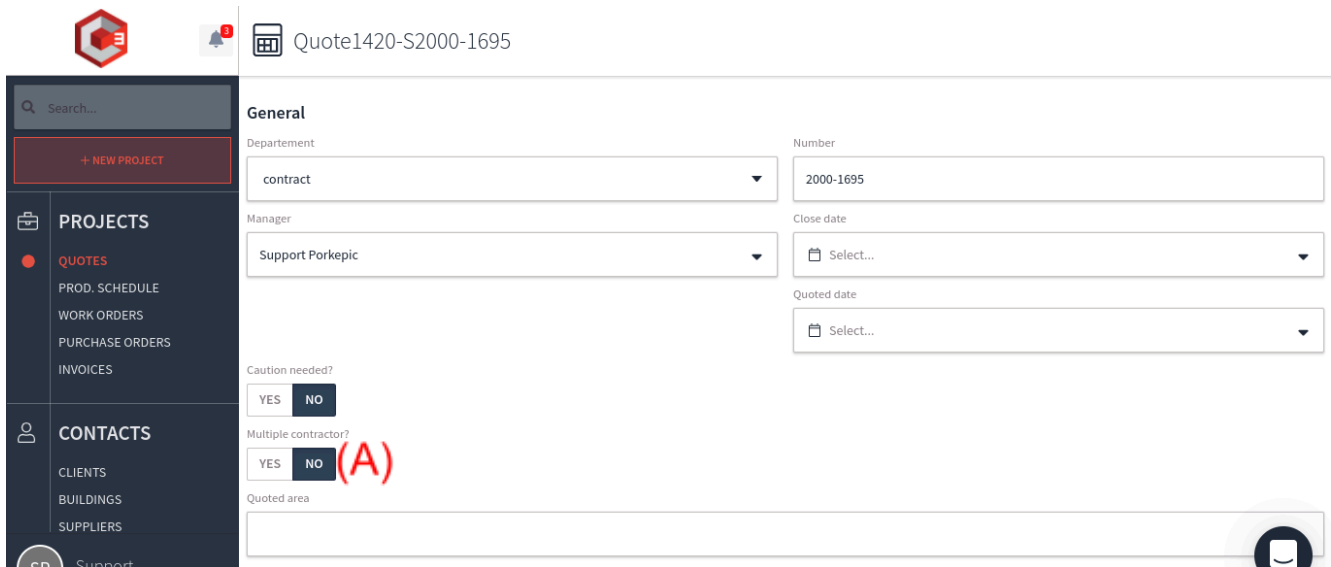


(F) It's also possible to attach other files to the quote such as certificates or attestations.

This step will mark the quote as sent.

### 7.9.5. Sending multiple contractors

It's possible to send the quote to multiple contractors. When a quote is to be sent to several people, it's possible to click on the multiple contractor function. Clicking on the small pencil in the upper right corner of the quote will take us to this page.



(A) By indicating yes to the multiple contractor section, a new section appears in the quote.

Quote 1420-S2000-1695  
Project 1420

open

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

> Activities

> Communications

> Checklist 5

> Contractor (B)

(B) Add another company (customer) and a contact.

Search...

+ NEW PROJECT

PROJECTS

QUOTES

Contractor

Company

Select...

Contact

Select...

Then, when sending, you will be asked to specify to whom you want to send the submission.

### 7.9.6. Automated customer follow-up

It's possible to use quote reminders. Go to [Project Preferences - Quotes](#) to organize the submission reminder section. The reminders are automatically set to reminder status. In the client follow-up you can see the reminders that have been made and sent.

Project 1410

work

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

> Communications

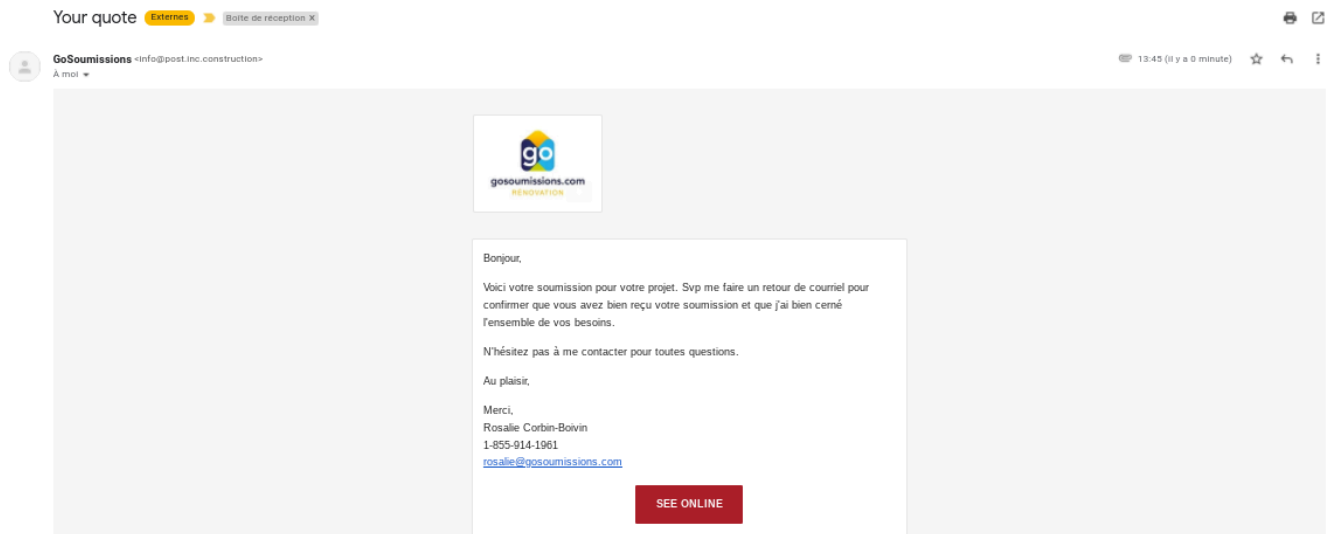
Email Merci d'avoir accepté la soumission 1410-S2000-1691 Recipients jcouture@gestion-bsp.com See message	Related to Sent by Created at Sent at	1410-S2000-1691 None. 25 Nov 2021 11:09 25 Nov 2021 11:09	1
Email Votre soumission Recipients jcouture@gestion-bsp.com See message	Related to Sent by Created at Sent at	1410-S2000-1691 Support Porkepic 25 Nov 2021 10:35 25 Nov 2021 10:36	2
Email Merci d'avoir accepté la soumission 1410-S2000-1691 Recipients sdarac@gmail.com See message	Related to Sent by Created at Sent at	1410-S2000-1691 None. 25 Nov 2021 10:32 25 Nov 2021 10:32	Delivered
Email Retour sur votre soumission - 1410-S2000-1691 Recipients jcouture@gestion-bsp.com See message	Related to Sent by Created at Sent at	1410-S2000-1691 None. 13 Nov 2021 11:30 13 Nov 2021 11:30	1

### 7.9.7. Electronic signature


It's important to mark the quote as *Won*. This can be done via the email sent to the client or in the *Approval* section on the top right.

#### 7.9.7.1. Via email


In the email, it's possible to see the online quote.

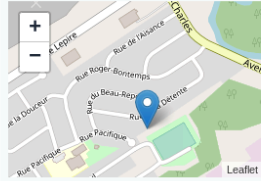


The client must take action by choosing which response to the following choices.


**GoSoumissions**

**SOUSSION #1001-S1007**  
Date 28 Dec 2021

**Client**  
**M. Mathieu Duchesne**  
1-581-571-6183  
1-581-571-6183  
rosalie@gosoumissions.com

**Job Site**  


535 Rue du Beau Repos  
Québec, QC  
G3G 1Y7, Canada  
Maison Mathieu

**Estimator**  
**Mme Rosalie Corbin-Boivin** GoSoumissions  
1-855-914-1961  
cellulaire  
rosalie@gosoumissions.com  
principal

**DESCRIPTION DES TRAVAUX**

**(C)** MODIFY...

**(B)** REJECT...

**(A)** APPROVE...

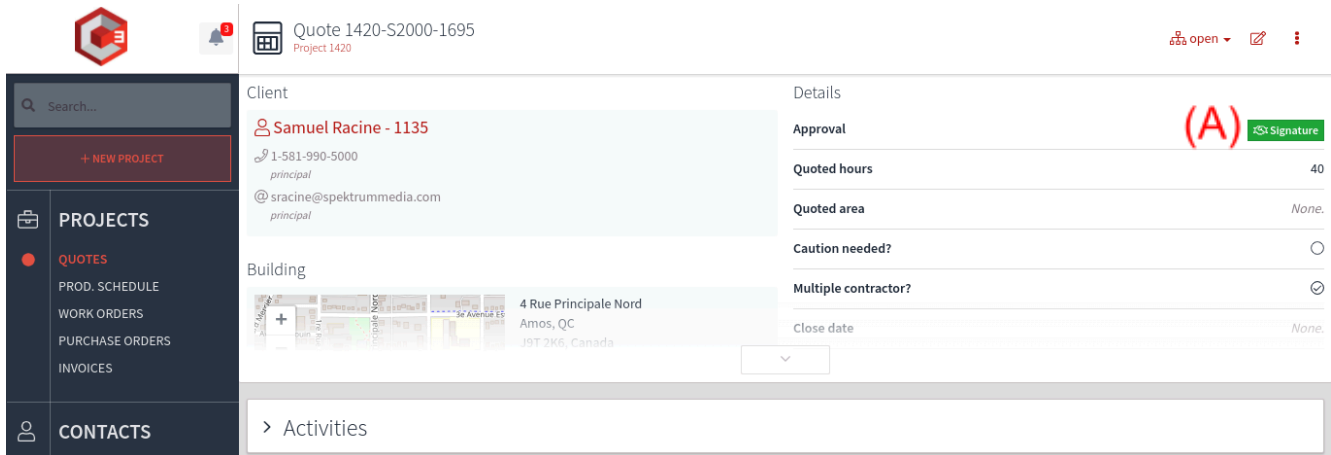
- (A) Approve.
- (B) Reject.
- (C) Request a modification for the quote.

By clicking on *Approve*, you must enter the name of the person who accepts, then an email is sent to the person in charge of the project and to the client. It's the same for the refusal and the modification.

The screenshot displays the GoSoumissions.com web interface. A modal window titled "APPROVE..." is centered on the screen. Inside the modal, there is a text prompt: "By writing your name below, you consider this document as *Read and Accepted* and you agree the terms and conditions described therein." Below this prompt are two input fields. The first field, labeled with a red "(A)", is for "Your name". The second field, labeled with a red "(B)", is for "Notes and modifications". A "Format" button with a red icon is located below the second field. At the bottom right of the modal are "CANCEL" and "APPROVE..." buttons. The background interface shows the "GoSoumissions.com" logo, a "COMMISSION #1001-S1007" with a date of "28 Dec 2021", contact information for Client "M. Mathieu Duchesne" and Estimator "Mme Rosalie Corbin-Boivin", and a section titled "DESCRIPTION DES TRAVAUX". At the bottom of the page are three buttons: "MODIFY..." (grey), "REJECT..." (red), and "APPROVE..." (green).

- (A) Enter the name of the employee who accepts it.
- (B) Enter notes and changes regarding the quote.

## 7.9.7.2. Via application



Quote 1420-S2000-1695  
Project 1420

open

Client

**Samuel Racine - 1135**  
1-581-990-5000  
principal  
@sracine@spektrummedia.com  
principal

Details

**(A)** Signature

Approval

Quoted hours 40

Quoted area None.

Caution needed? ☐

Multiple contractor? ☒

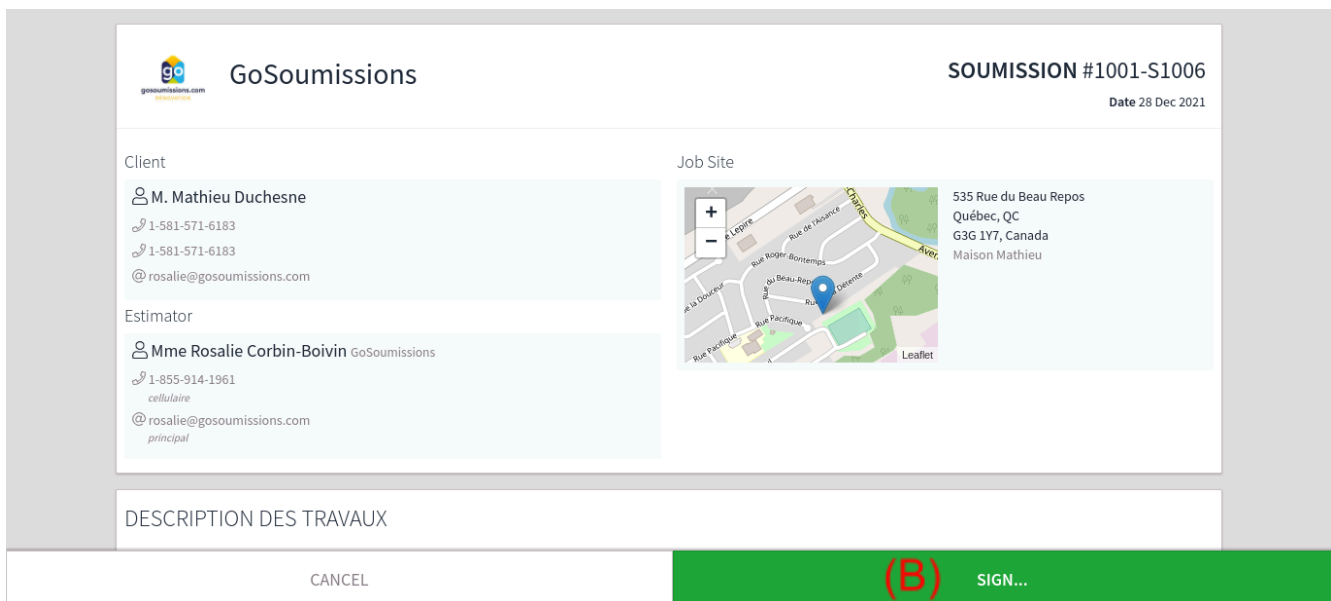
Close date None.

Building

4 Rue Principale Nord  
Amos, QC  
J9T 2K6, Canada

> Activities

(A) Press the *Signature* tab to have the client sign on the screen of a phone or tablet. You need to choose what type of document you want them to sign and then the quote appears on the screen.



GoSoumissions

SOUMISSION #1001-S1006  
Date 28 Dec 2021

Client

**M. Mathieu Duchesne**  
1-581-571-6183  
1-581-571-6183  
@rosalie@gosoumissions.com

Estimator

**Mme Rosalie Corbin-Boivin** GoSoumissions  
1-855-914-1961  
cellulaire  
@rosalie@gosoumissions.com  
principal

Job Site

535 Rue du Beau Repos  
Québec, QC  
G3G 1Y7, Canada  
Maison Mathieu

DESCRIPTION DES TRAVAUX

CANCEL

**(B)** SIGN...

(B) Press *Sign* to include the electronic signature.

## Example of an electronic signature

**SIGN...**

By writing your name below, you consider this document as *Read and Accepted* and you agree the terms and conditions described therein.

Your name

Mathieu Duchesne

CANCEL SAVE

CANCEL SIGN...

Quote 1001-S1006  
Project 1001

Client

M. Mathieu Duchesne  
1-581-571-6183  
1-581-571-6183  
rosalie@gosoumissions.com

Building

535 Rue du Beau Repos  
Québec, QC  
G3G 1Y7, Canada

Details

Approval (C) **APPROVED**

Quoted hours None.

Quoted area None.

Caution needed? ☐

Multiple contractor? ☐

Close date None.

(C) The quote then becomes *Won* and the approval status is now *Approved*.

## 7.10. Pre-construction stage

When the quote is accepted, the project becomes in pre-construction status. It's now time to create a work order and a purchase order. If the information was in the quote, the work orders are created automatically. However, if the information was not in the quote, it must be created manually.

### 7.10.1. New Purchase order

The screenshot shows the 'Project 1420' interface. On the left is a sidebar with a search bar and a '+ NEW PROJECT' button. Below this is a menu with 'PROJECTS' (selected), 'QUOTES', 'PROD. SCHEDULE', 'WORK ORDERS', 'PURCHASE ORDERS', 'INVOICES', and 'CONTACTS'. The main area displays the 'Purchase Orders' tab with a count of 1. A red '(A) +' is next to the tab. Below the tab, a card for '1420-P1312' is shown with an 'open' button. The card lists: Project 1420, Building 4 Rue Principale Nord, and Client Samuel Racine. At the bottom, it says '1 items in the list.' with navigation arrows.

(A) Add a purchase order by clicking on the + on the right in the options of the *Project* tab.

### 7.10.2. Purchase orders interface

All the options available to complete a purchase order are detailed below.

The screenshot shows the 'Purchase Order 1420-P1312' interface. At the top, there's a header with the project name and a red '(A)' next to it. Below the header is a sidebar with a search bar and a '+ NEW PROJECT' button. The main area is divided into two sections: 'Client' and 'Building'. The 'Client' section shows 'Samuel Racine - 1135' with a red '(B)' next to it, along with contact information: phone 1-581-990-5000, email sracine@spektrummedia.com, and address 4 Rue Principale Nord, Amos, QC. The 'Building' section shows a map and the same address. To the right of these sections is a 'Details' panel with fields for Title, Manager (Support Porkepik), Supplier, Delivery type, and Expected start. At the bottom, there are two tabs: 'Activities' with a red '(C)' and 'Communications' with a red '(D)'.

- (A) The name and numbering are created automatically after pressing the + (previous step). It's possible to change the information in the small pencil on the right.
- (B) All the information related to the client and the details are present.
- (C) Purchase order activities (note, follow-up, task).
- (D) Communications (all email exchanges).

The screenshot shows the 'Order reception' screen in the C-Cube application. The sidebar on the left has a search bar and a '+ NEW PROJECT' button. Below this, the 'PROJECTS' section is active, showing options for 'QUOTES', 'PROD. SCHEDULE', 'WORK ORDERS', 'PURCHASE ORDERS' (highlighted with a red dot), and 'INVOICES'. The 'CONTACTS' section is also visible. The main content area is titled 'Order reception (E)' and features a 'RECEIVE' button. Below the title, there is a section for 'Items & descriptions (F)' with a table that has columns for 'Received Qty' and 'Planned Qty'. The table currently shows 'No lines.' and a 'TOTAL \$ 0.00' at the bottom right. At the bottom of the main area, there is a section for 'Pictures & files (G)'.

- (E) Receive the purchase order by pressing *Receive*.

All materials that have been ordered on this voucher will be displayed. Simply enter the number received in the appropriate box. It's also possible to add a note, assign costs to the project and attach a delivery slip.

- (F) Add the materials by clicking on the + on the right. In addition, if the materials have been entered in the *Quote* interface, you can press *Import from project* to have them included automatically.

It's necessary to define:

- The materiel
- The description
- The planned quantity
- The unit price

- (G) Include a file and/or a photo.



### 7.10.2.1. To send to the subcontractor

To send the purchase order to the supplier in question, press the three small dots at the top right of the *Purchase Order* interface. There are two PDF versions available, *Purchase order* and *Inventory purchase order*. To complete the sending, click on *Send*.

It's necessary to define:

- The subject
- The recipient's email
- The sender's email
- The PDF to attach
- The email text
- Add another file if needed

### 7.10.3. New Work orders

Project 1420

pre-work

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

> Purchase Orders 1

Work Orders 1 (A) +

1420-W1489	open	1420	Trade	None.	Expected start	None.
Client		Samuel Racine	Expected duration	40	Real start	None.
Building		4 Rue Principale Nord	Duration	None.		

< 1 >

1 items in the list.

(A) Include a work order by pressing the + on the right.

#### 7.10.4. Work orders interface

The process of creating a work order is detailed below. In addition, the three small dots at the top right allow you to edit the information, the different PDFs available for printing, invoice time and materials and view the job report. It's also possible to change the status of the work order.

Work Order 1420-W1489 (A)

Client (B)

Samuel Racine - 1135  
1-581-990-5000  
principal  
@sracine@spektrummedia.com  
principal

Building (C)

4 Rue Principale Nord  
Amos, QC  
J3T 2G9, Canada

Details

Project 1420

Client Samuel Racine

Client contact None.

Building 4 Rue Principale Nord

Contact on site None.

Manager Support Porkepik

> Activities (D)

> Work description (E)

> Daily reports (F)

> Time (G)

> Materials 8 (H)

> Pictures & files 2 (I)

(A) The name is created automatically after pressing the + (previous step).

(B) All the information related to the client and the details are present.

(C) Work order activities (note, follow-up, task).

(D) The description of the work as mentioned in the *Work* tab of the *Quote* interface. The description can have more than one section that segments multiple sections of the project.

(E) Add, one at a time, all the employees concerned by the project. They are notified that they have new tasks.

(F) Create a [daily report](#) for each day worked on the project. For more details, click on the link.

In addition, it's possible to click on *View work report* next to the + on the right. The client report is a complete documentation of your project from your daily reports. Simply import the completed daily reports to the job report. Send it to your clients to charm them. This PDF report includes:

- The name of the project
- The customer information
- The date
- The activities (note, follow-up, task)
- The communication
- All daily reports related to the project

(G) The summary of the time of all employees who worked on the project. The time is recorded in the daily report.

(H) The summary of materials used by employees who worked on the project. The materials can be entered in the daily report or directly in the work order.

(I) Include a file and/or photo if necessary.

#### **7.10.4.1. Project tasks**

For project tasks, it's possible to include a checklist in each segment of the job description after it has been previously created. Press *+Item*, you now have the choice to insert an existing template or a new item.

#### **New item**

It's necessary to define:

- The task
- The assignment of the task
- The date

## 7.11. Construction stage

### 7.11.1. Production schedule

The production schedule helps to visualize all the crews on the job sites. The bar at the bottom of each work order represents the progress of the job. This section is filled in with the daily reports. It shows the number of hours worked over the estimated number of hours, the percentage progress and the number of employees required.

The screenshot shows the C-Cube software interface. On the left is a sidebar with navigation options: PROJECTS, QUOTES, PROD. SCHEDULE, WORK ORDERS, PURCHASE ORDERS, INVOICES, CONTACTS, CLIENTS, BUILDINGS, SUPPLIERS, EMPLOYEES, REPORTS, PREFERENCES, and GETTING STARTED. The main area displays a calendar for 'This Week' with work orders assigned to teams. Below the calendar, there are sections for 'Scheduled' and 'Unscheduled' work orders, each with a search bar and a list of work orders showing details like technician, start date, city, and progress bar.

(A) Select the desired service to display the appropriate calendar. Indeed, it's possible to create a calendar for each service offered within your company.

Click on the calendar icon to display three consecutive months.

The arrows are used to move from one week to another in the calendar. The circle in the middle of the arrows is used to go back to the current week.

(B) Validate the work orders assigned to your employees if you wish.

It's possible to select one of them in order to move it in the calendar. Before making the change, make sure you are not going to create a schedule conflict.

In addition, you can make changes by tapping on the team name.

It's necessary to define:

- The name of the team leader
- The color associated with the team
- The number of employees required
- The name of the team members

Note that changes to the team only affect future releases.

(C) Add a team to the calendar.

(D) Drag the work order onto the red box to remove it from the schedule. It's also possible to drag the work order to assign it and put it on the schedule.

(E) Directory of scheduled work orders for the current week.

(F) Directory of work orders to come on the calendar in the following weeks.

### 7.11.1.1. Team management

#### 7.11.1.1.1. Notify the team

The screenshot shows the C-Cube application interface. On the left is a sidebar with navigation icons and labels: INVOICES, CONTACTS, CLIENTS, BUILDINGS, SUPPLIERS, EMPLOYEES, REPORTS, PREFERENCES, and GETTING STARTED. The main area is a calendar view for 'This Week'. The calendar grid shows days from Monday (27) to Sunday (2). A team named 'Francois Lalumière' is highlighted in the calendar. A context menu is open over the calendar, showing options: 'Team members', 'Notify team' (marked with a red (B)), 'Freeze here', and 'Holiday schedule'. A work order card for '1427-W1481 Steeve Darackian' is also visible, with a red (A) pointing to a downward arrow in its header.

(A) Press the arrow pointing down in the box representing the work order.

(B) Select *Notify Team*.

The team leader will receive a notification the day before to remind him of the tasks.

It's also possible to modify the team, to freeze the work order at its location and to modify the vacation schedule.

### 7.11.1.2. Boards

You can create several tables. Each table represents a service offered by your company as mentioned above. To do so, click on *Service* at the top right, then on *New Board*.

You can also filter the work orders that appear in the queues in your table by the following criteria.

**Board**

Board Name (A)

**Filters**

Trades (B)

Work Types (C)

Property Types (D)

Technologies (E)

CANCEL SAVE

(A) Define the name of the table.

(B) Filter by profession.

(C) Filter by type of work.

(D) Filter by type of property.

(E) Filter by technology.

It's plausible that not all filters apply to your need for creating this table, in which case leave the box blank.

### 7.11.2. Daily reports

The daily reports list all the actions that have been done during the day. The tool is used by employees to report to their supervisor.

Daily Report 28 Dec 2021 00:00 (A)  
Project 1410 / Work Order 1486

Search...

+ NEW PROJECT

PROJECTS  
QUOTES  
PROD. SCHEDULE  
WORK ORDERS  
PURCHASE ORDERS  
INVOICES

CONTACTS  
CLIENTS  
BUILDINGS  
SUPPLIERS

SP Support

Travaux de réparation (B)

- Réparation facade extérieur sur ± 210 pilin.
- Réparation drip sur ± 70 pilin.

Toiture plat conventionnelle - Élastomère sopra - Réfection  
Superficie : pi2  
Bordure de toit : ni lin.

HOURS (C) MATERIALS PICTURES DELIVERIES

✓ COMPLETE (D)

- (A) The name is created automatically after pressing the + in the *Work order* section.
- (B) All the information related to the client and the building are present.
- (C) Add time, materials, photos and receipt of orders. For more information, see the procedures below.
- (D) Press *Complete* to finish the daily report.

### 7.11.2.1. Time sheets

To add a new timesheet, simply click on the + to the right in the *Timesheet* tab of the *Daily report* section.

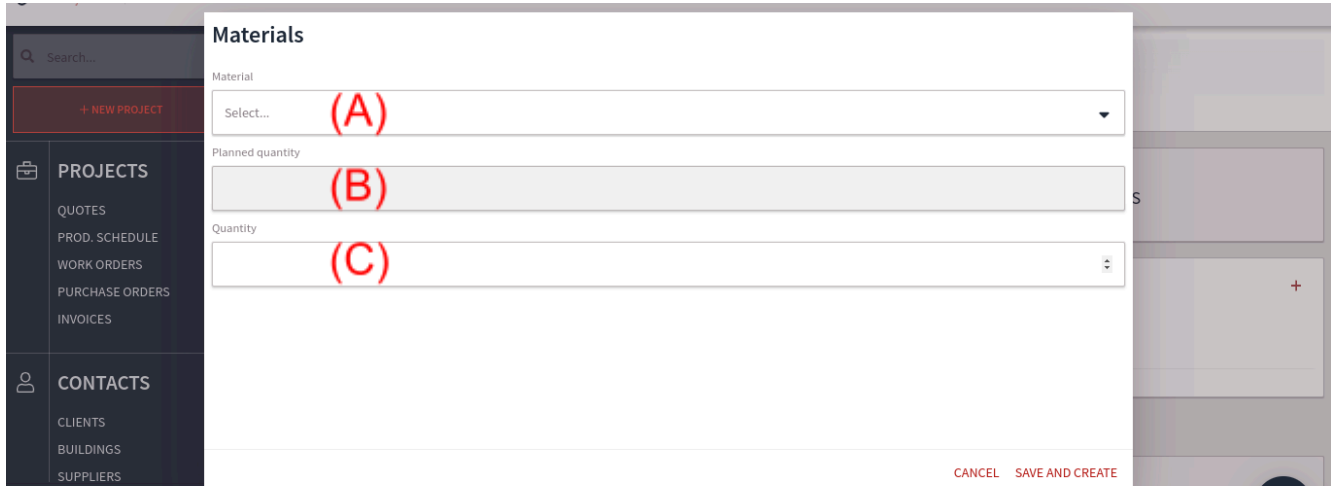
The screenshot shows the 'Timesheets' form in the CCube application. The form is titled 'Timesheets' and is located in the 'Daily report' section. It contains several fields for entering time sheet data, each labeled with a red letter in parentheses. The fields are: Employee (A), Rate (B), Absent? (C) with YES and NO buttons, Date (D) with a calendar icon, Start (E), Break hours (F), End (G), Travel hours (H), Other hours (I), Work hours (J) showing 8.5, Total hours (K) showing 8.5, and Notes (L). At the bottom right are buttons for CANCEL, SAVE AND CREATE. The left sidebar shows navigation options like PROJECTS, CONTACTS, and DELIVERIES.

- (A) Select the employee's file.
- (B) Validate the applied hourly rate.
- (C) Select if the employee is absent.
- (D) Validate the date (usually the current date).
- (E) Enter the starting time.
- (F) Indicate the total time of unpaid breaks.
- (G) Enter the ending time.
- (H) Indicate travel time if paid.
- (I) Indicate if there is another type of time to include.
- (J) Validate the number of hours worked for the day.
- (K) Validate the total amount of time worked for the day.
- (L) Add notes if needed.



### 7.11.2.2. Materials used

To add a material, simply click on the + to the right in the *Materials* tab of the *Daily report* section.



(A) Choose the material to be entered.

(B) The planned quantity is added automatically.

(C) Enter the quantity used.

### 7.11.2.3. Deliveries

To do the reception, click on *Receive*. This will give you access to all the purchase orders related to the project. Then, select the appropriate purchase order to identify the quantities received.

There is a *Notes* section if needed. Also, you must choose if you want to assign costs to the project. Then you can attach a picture of the delivery slip as proof.

### 7.11.2.4. Photos and notes

It's possible to include a file and/or a photo if necessary. This allows you to keep physical evidence of the daily progress of the work. In addition, it allows for the identification of deficiencies, if any, to be added to the tasks to be done.

When all the tabs have been filled in, press *Complete* at the top right.

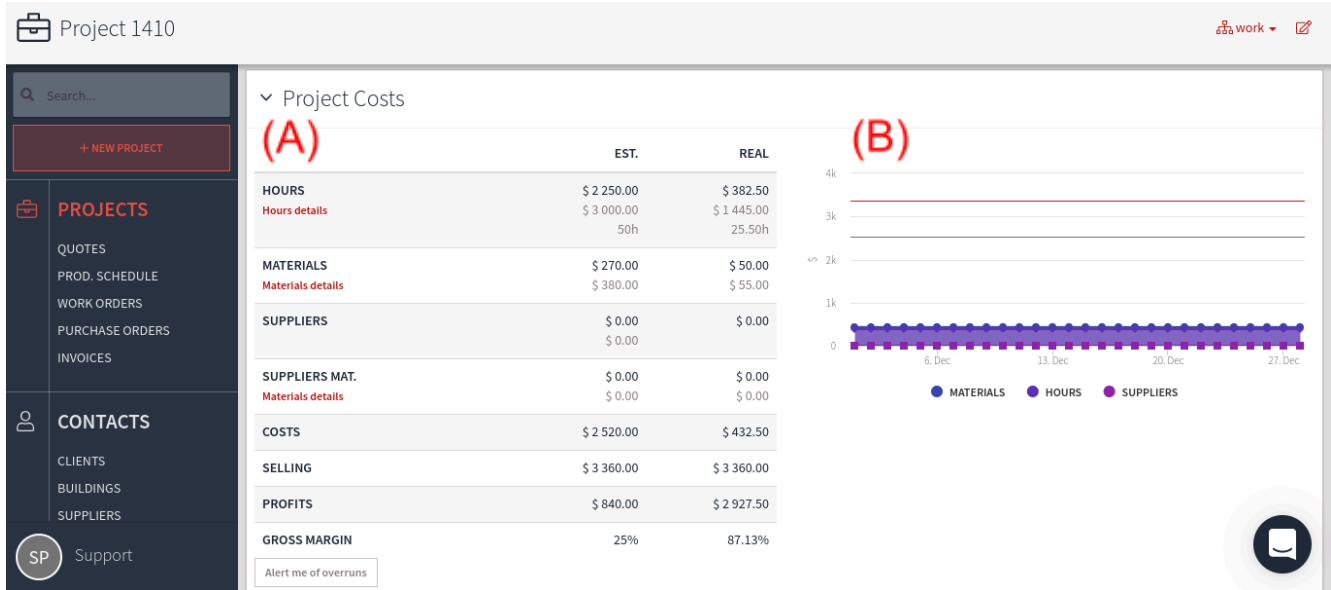
It's necessary to define:

- The description of the work
- The work order is completed or not
- The report's conclusion

## 7.12. Post-Construction Stage

### 7.12.1. Project costs

The job cost tab is available in the options of the *Project* interface. On the one hand, there is a summary table of all the costs generated by the work, and on the other hand, there is a graph that includes 3 curves on materials, time and supplier as well as 2 lines for the amount of margin and another one to indicate that the initial costs have been exceeded.



(A) The total cost allocation table.

(B) The graph of total costs according to materials, time and suppliers.

The straight line in gray is the ceiling of the initial estimated costs.

The straight red line indicates the ceiling that must not be exceeded for the project to be profitable.

The space between the two lines represents your profit margin.

Thus, when you go over the gray line, you reduce part of your profit. It's therefore important to keep a close eye on the costs of the work in order to make the most profit possible per project.

### 7.12.1.1. Assigning costs to the project

Purchase orders help assign costs to the project when they are received for the *Supplier materials* section. For materials that are not on a purchase order, they must be added manually. The *Real* column is completed using the costs on the receiving orders and manual entries.

Work orders allow, among other things, to apply time-related costs to the project. Simply invoice a work order in *Invoices*.

## 7.13. Closed stage

### 7.13.1. New invoice

You can create one or more invoices per project or per customer. You can then receive partial or full payments.

The screenshot shows the 'Invoices' section of the software. At the top, there's a header with the 'Invoices' title and a plus sign icon (A). Below this, a summary bar shows 'INVOICES' count (267), 'TOTAL' amount (\$ 3 264 051.57), and 'PAID' amount (\$ 1 095 087.99). The main table lists individual invoices with columns for invoice number, status, client, project, due date, follow-up date, and financial details (Total, Payments, Balance). The first three invoices are highlighted in blue. The sidebar on the left contains navigation links for PROJECTS, QUOTES, PROD. SCHEDULE, WORK ORDERS, PURCHASE ORDERS, INVOICES (selected), and CONTACTS. A search bar and a '+ NEW PROJECT' button are also visible.

(A) Press the + in the upper right corner.

In addition, there is more information to view on this window.

(B) The number of invoices.

(C) The total amount of the invoices.

(D) The total amount of invoices paid.

It's also possible to add an invoice directly in the *Invoices* tab in a project.

### 7.13.2. Invoice interface

The invoice interface includes customer information, project details, description, payment, activities and customer follow-up.

Invoice 1265  
Project 1410

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

WORK ORDERS

PURCHASE ORDERS

INVOICES

CONTACTS

CLIENTS

BUILDINGS

SUPPLIERS

SP Support

Description (A) +

DESCRIPTION	QUANTITY	UNIT PRICE	TOTAL
Couvreur compagnon - Couvreur	17	\$ 60.00	\$ 1 020.00
Manoeuvre. - Manoeuvre.	8.5	\$ 50.00	\$ 425.00
Vis a Gypse	1	\$ 55.00	\$ 55.00

Note

No description.

Terms

Payable 30 jours

Subtotal

\$ 1 500.00

TPS : 784672924 RT0001

\$ 75.00

TVQ : 122354 4423 TQ0001

\$ 149.63

Total

\$ 1 724.63

Payments

\$ 0.00

Balance

(A) Press the + on the right to add a description.

You must choose between:

- New line
- Invoice a work order
- Invoice a quote

#### 7.13.2.1. Payment

The payment is added in an invoice. Please note that the payment cannot be made on the C-Cube platform. However, it's possible to export the data to ultimately attach it to your accounting software.

Invoice 1265  
Project 1410

Search...

+ NEW PROJECT

PROJECTS

QUOTES

PROD. SCHEDULE

Payments (A) +

Date	Amount	Description
\$ 28 Dec 2021	\$ 1 000.00	partial amount

(A) Click on the + on the right to add a payment.

The window below will appear and you will be able to complete it.

**Nouveau Paiement**

Payment total: 724,63 (A)

Notes: (B)

Format: [icon]

Paid on: X 28 Dec 2021 (C)

**Répartition du paiement**

DESCRIPTION	FACTURÉ	PERÇU	RÉPARTI
\$1265	\$ 1 724.63	\$ 1 000.00	(D) \$ 724.63

Buttons: Save, [icon]

(A) Enter the amount of the payment.

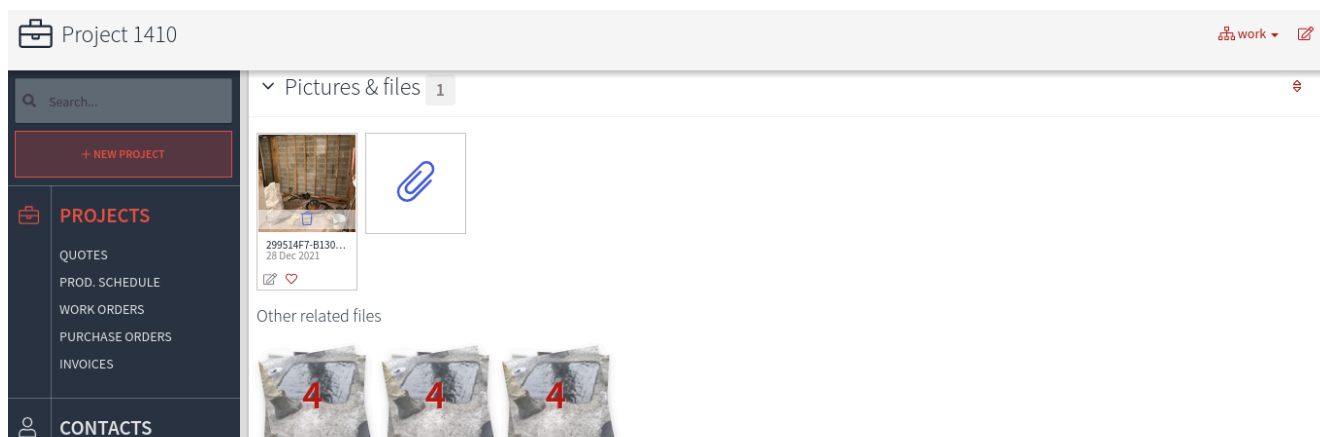
(B) Include notes if needed.

(C) Indicate the date of payment.

(D) View the payment distribution.

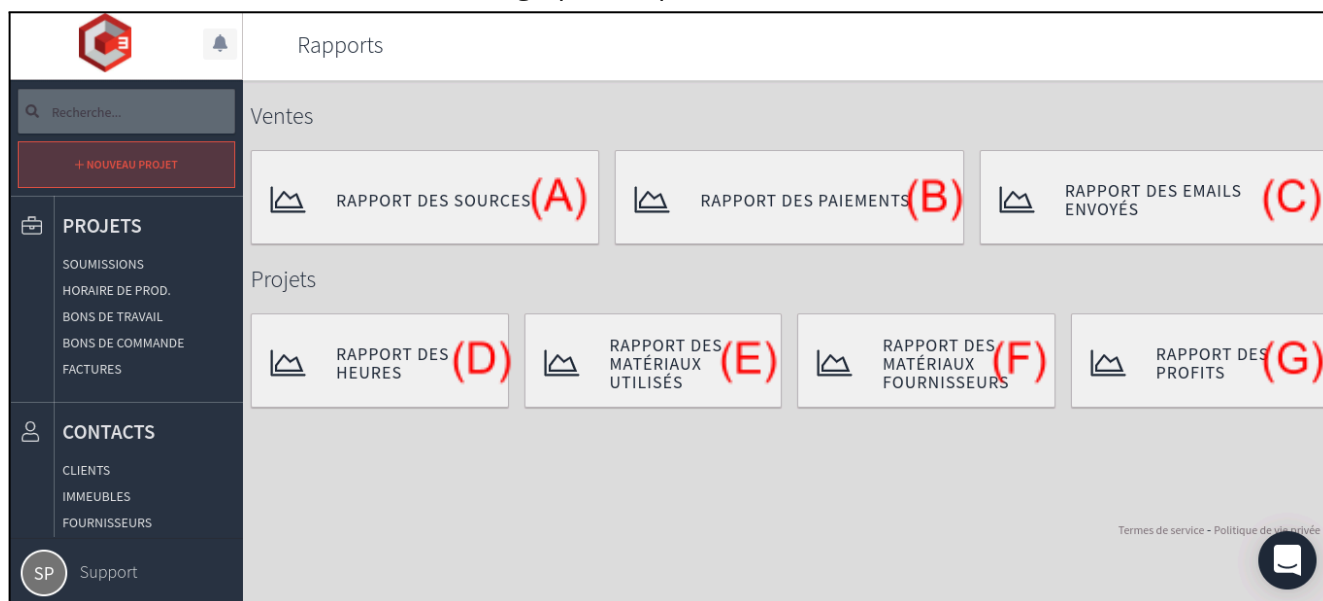
## 7.14. Photos and files

In this section of the project, it's possible to see all the photos and files attached in the different sections of the project. In fact, it's a media library where all the documents are centralized.



## 8. Management

This section allows the extraction of reports concerning sales and projects in order to maximize management efficiency at all times. The information contained in the reports is automatically updated when the report is added. Advanced searches can also be done using different filters to facilitate access to data. For all filtering options, please refer to the [Filters](#) section.



### 8.1. Reports

#### 8.1.1. Sources

(A) The sources report tracks all the information collected in the [Sources](#) section of *New project - real-time additional information*. This tool allows you to identify how customers heard about your company, quantifying by type of source which ones led to contracts or not.

Among other things, this report helps plan a marketing strategy based on the means used to make the company known. The analysis allows to differentiate between those to keep and those to reject.

The sources can be modified in the [Project preferences - General](#) section.

#### 8.1.2. Payments

(B) The payment report lists all payments received since you started using the interface. This tool allows you to distinguish the payments received from your customers in real time. For example, it can list all payments received in the last week.

The payment report is complementary to the *Sales overview* previously seen. Therefore, by taking all the data collected, it's possible to determine all the payments to come in a given time or the number of invoices to be issued.

### 8.1.3. Outgoing emails

(C) This report allows you to see all the emails sent via the C-Cube platform. Moreover, a status is given to each email to help determine what action to take. There are four status display options: sent, undelivered, delivered, viewed. In addition, emails can be viewed according to a predefined period.

### 8.1.4. Hours

(D) The hours report includes all employees within a company. Each hour is counted in order from the farthest day to the most recent.

The report includes:

- The hourly rate\*
- The absences
- Start of the day
- End of the day
- Break time
- Travelling time
- Other times
- Time worked
- Total time
- Notes

\*To define the hourly rate for a trade, please refer to the *Rates* section in [Project preferences - general](#).

This report is useful to have an overview of the hours worked by its different teams or employees in the field. They are recorded in real time by employee in the system. It's possible to use it to process payroll, evaluate employee productivity or analyze the number of hours of absence listed in order to find a strategy adapted to the needs of your employees (work-family balance). Several possibilities are available to you to optimize the efficiency of the use of your employees' work hours report.

### 8.1.5. Used materials

(E) The report allows you to count all the materials used for the realization of a project. They are displayed in a list under the name of the project in question. This makes it possible to quantify the percentage of material costs for the project.

In fact, there is a column for the estimated cost price and another for the actual cost price. In addition, a more advanced search helps to deepen the analysis by giving access to the annual use of each material listed in the database. This also allows for the calculation of the cost of purchasing the materials needed to complete the job.

### 8.1.6. Supplier materials

(F) The supplier materials report allows you to analyze how many materials you have ordered and used through the suppliers linked to your account. They are listed under the name of the project for which they were used. This allows you to evaluate the flow of purchase orders issued during the year for each supplier. This allows you to negotiate agreements with the most used suppliers or to obtain better payment conditions thanks to the trust established between the two companies.

Then there is a column for the estimated cost price and another for the actual cost price. This makes it possible to evaluate if prices have been modified on the platform or to identify the difference between ordered and delivered materials. Thus, it's possible to adapt these supplier choices to maximize efficiency, productivity and profitability.

### 8.1.7. Profits

(G) The profit report helps to visualize the profit in a concrete way with the help of a graph. There are three curves, one for materials, one for time and one for suppliers. The graph includes all the projects created since the beginning of the use of its platform. It's possible to sort the information; to do so, please refer to the [Filters](#) section below.

Afterwards, there is also a summary table of all the projects. It includes time, material, cost, selling price, total profit and gross margin in percent. Each item has an estimated cost and an actual cost as mentioned above. Thus, it allows to quickly take note of the most important and profitable works. Then, the table is useful to set objectives better adapted to the services offered or even to change the service offer either by enlarging the range of choices or by reducing it.

## 8.2. Filters

Each section has filtering options to further refine the search. To access them, click on the funnel at the top right; all available filters for that section will be displayed. Each section has its own options based on the relevant data to perform an advanced and targeted search. These are listed below.

### Projects

- Stage
- Client
- Project number
- Manager
- Estimator
- Source
- Work type
- Technology



- Property type
- Communication
- Follow up date
- Create at
- Quote date
- Work start
- Work end

## Quotes

- Stage
- Source
- Work type
- Technology
- Property type
- Client
- Manager
- Estimator
- Quote number
- Project number
- Create at
- Presented at
- Won at
- Close date

## Work orders

- Stage
- Manager
- Assignee
- Work order number
- Project number
- Created at
- Start
- Expected start

## Purchase orders

- Stage
- Manager
- Supplier
- Purchase order number

- Project number
- Created at
- Expected start

## **Invoices**

- Stage
- Work type
- Technology
- Client
- Invoice number
- Project number
- Estimator
- Follow up date
- Creation date
- Issue date
- Due date
- Sent at
- Partial at
- Paid at
- Credit note

## **Contacts, clients, buildings, suppliers and employees**

- Name
- Type
- Subtype

## **Sources report**

- Manager
- Estimator
- Technology
- Created at

## **Payments report**

- Project number
- Invoice number
- Paid on

### **Outgoing emails report**

- Sent by
- Sent at
- Opened greater than X times

### **Hours report**

- Dates
- Employee
- Project number

### **Used materials report**

- Created at
- Project number
- Material

### **Suppliers materials report**

- Created at
- Project number

### **Profits report**

- Created at
- Estimator
- Team lead
- Project number

In addition, all reports are exportable to an Excel file. Just open the filters, then, under Export, click on the red link *To Excel*.

## **9. Roles**

### **9.1. Data access**

Roles are associated with users and modify the actions they can do in the software. They can modify what they see, what they can create, modify or destroy.

### **Employee**

This role is assigned to all new users. It allows to:

- View, create and edit contacts

- See, create and modify the tasks assigned to him and the notes.

### **Administrator**

An administrator can do everything in the software.

### **Estimator**

This role is designed for employees who do estimates and sales. It allows for:

- See and modify what is assigned to it:
  - projects
  - quotes
  - purchase orders
  - work orders
  - meetings
- See the assemblies and materials

### **Customer service**

This role is designed for secretaries or general customer service. It allows you to:

- See and modify everything in the software
- No access to modify preferences

### **Coordinator**

This role is designed for production managers or project managers. It allows you to:

- See and modify:
  - projects
  - work orders
  - purchase orders
  - production schedule
  - assemblies
  - materials
  - interventions

## Team lead

This role is designed for team leaders using the software from the field. It allows to:

- See and modify what is assigned to it:
  - projects
  - purchase orders
  - work orders
  - interventions

### 9.2. Permissions

If you want to add or change these roles for your company, please contact your integration coach. He or she will be able to modify this for you. Please note that additional fees apply.

## 10. API

An API is a set of definitions and protocols that facilitate the creation and integration of software applications. API is an acronym that stands for *Application programming interface*.

We don't have an external API open. We are validating the possibility of creating one, but it will not be in the short term. We don't give access to the platform unless you want to pay for the development time to give access to your application. In fact, a poorly developed API could put our system and other users at risk. In short, this is a big project that requires analysis and special considerations for security.

We are currently working on an API with Quickbooks to enable real-time accounting communication and data transfer.

If we have requests for other programs, we will evaluate them so that everyone can benefit.

## Conclusion

The training of the application is based on the needs of the customer according to the level of knowledge of the application. It's possible to use only certain parts of the application and the training table will be adjusted accordingly. The application allows a contractor who wants to succeed to do a close follow-up on all his projects and his company.