C-Cube

User Guide
December 2021

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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.

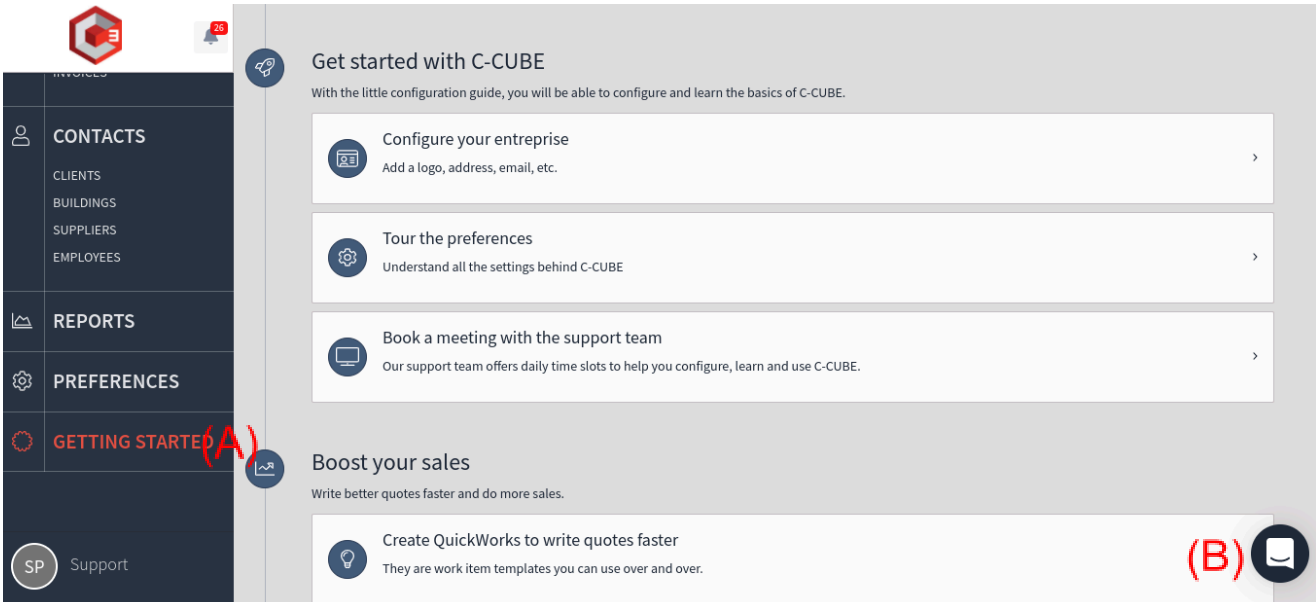
It's essential to consider that C-Cube evolves its procedures and interfaces in a very dynamic way, often without notice. This will inevitably lead, over time, to discrepancies, even inconsistencies, between the information and procedures that will be communicated during training and what you will eventually 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.

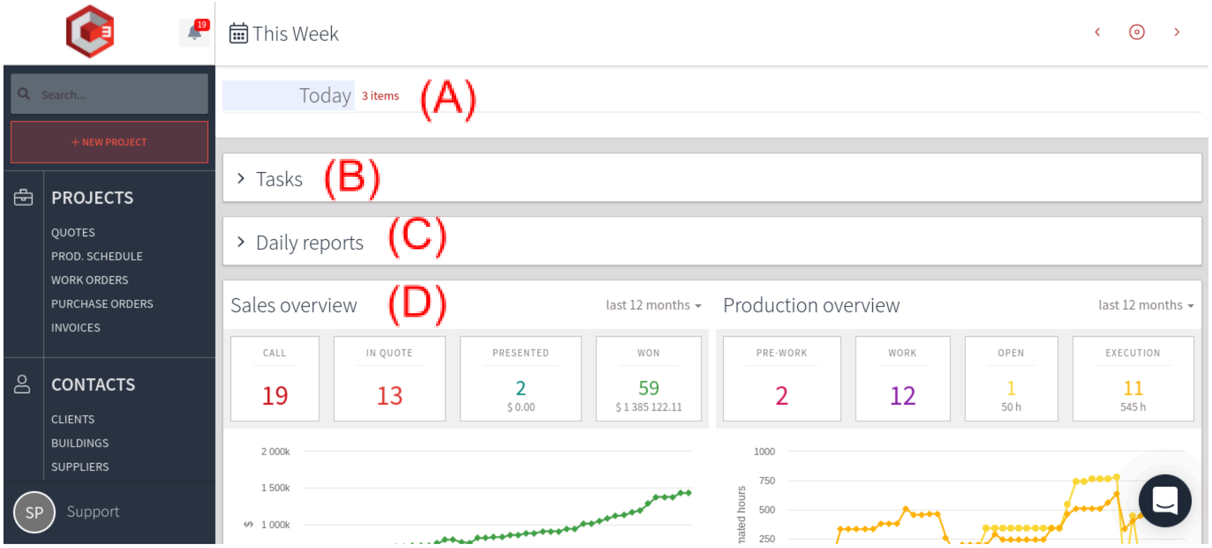
Every white box takes you to the options of this feature offered by C-Cube. For example, the enterprise configuration allows you notably to change the logo and/or the company information while the preferences tour directs you towards a video link that explains the complete procedure and the link to change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

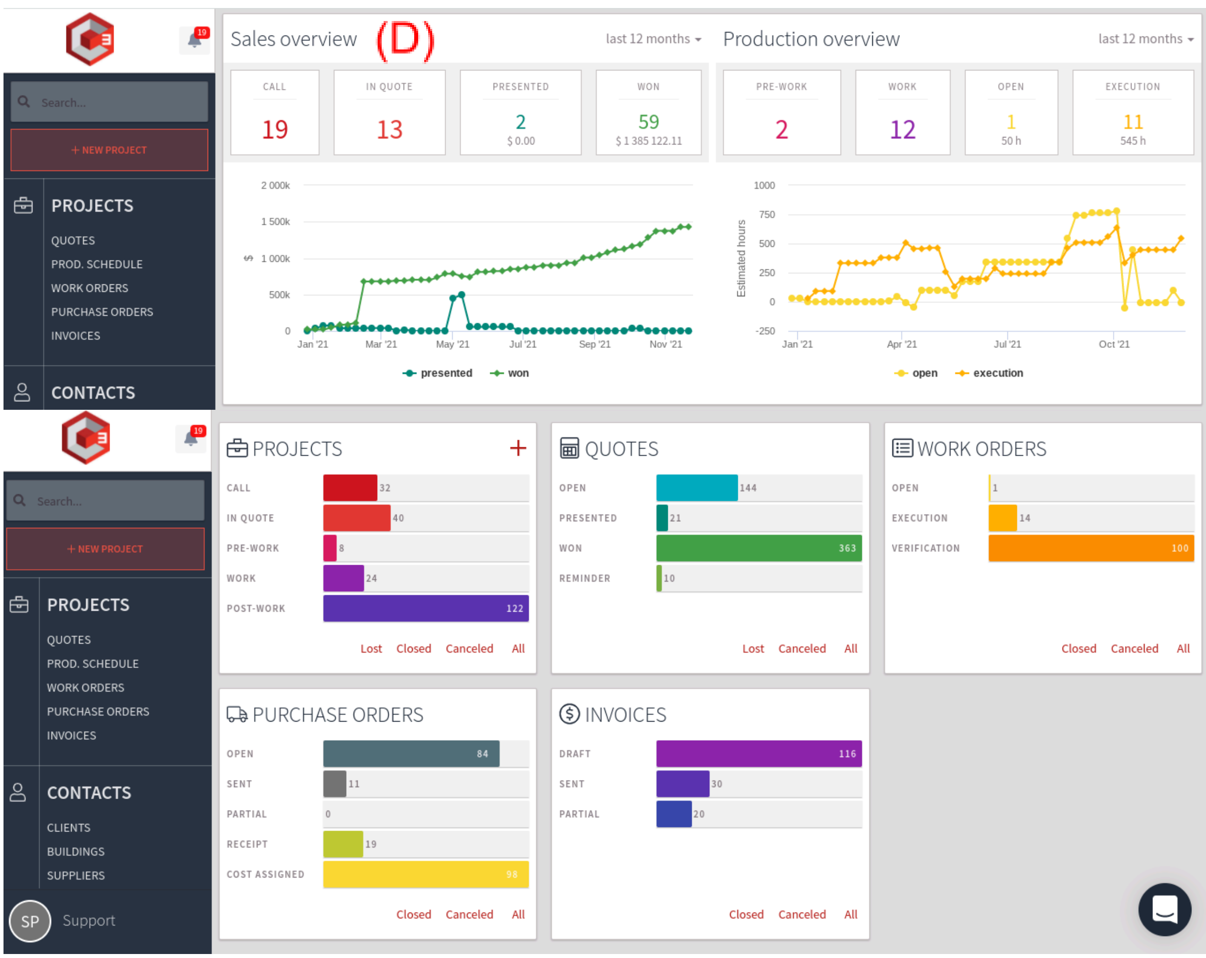
2.3. Daily reports

(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.

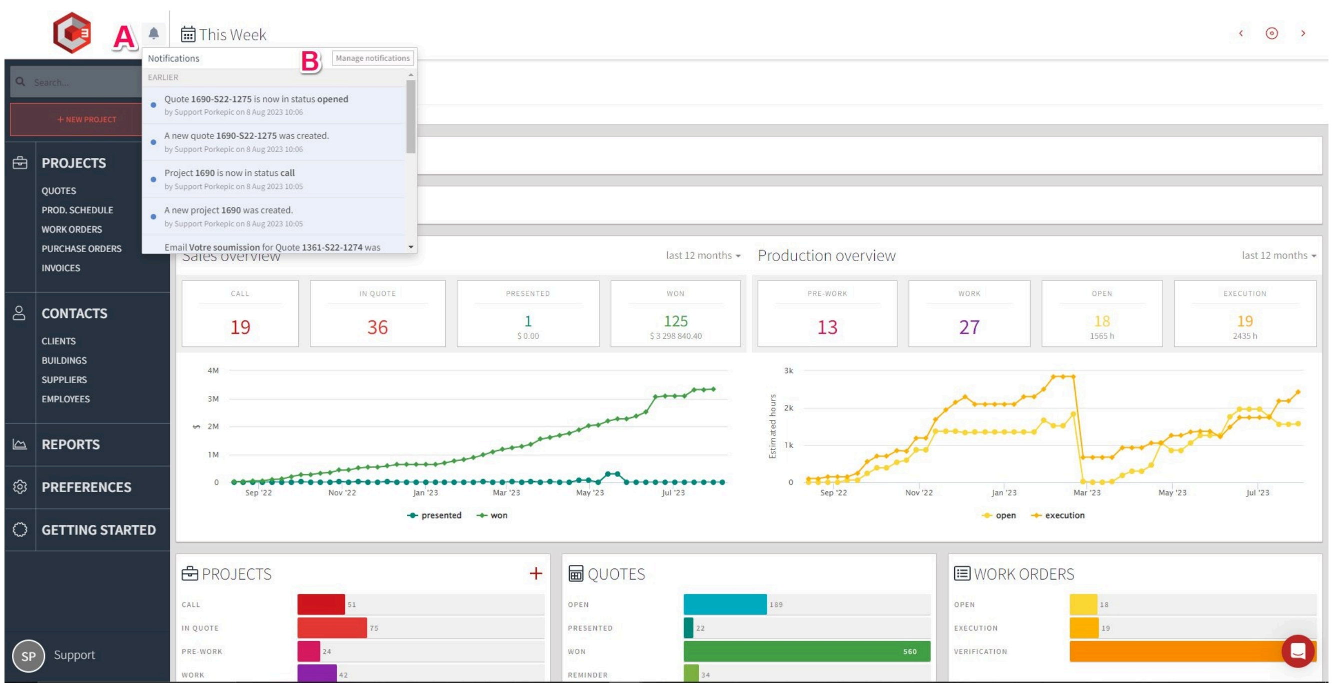


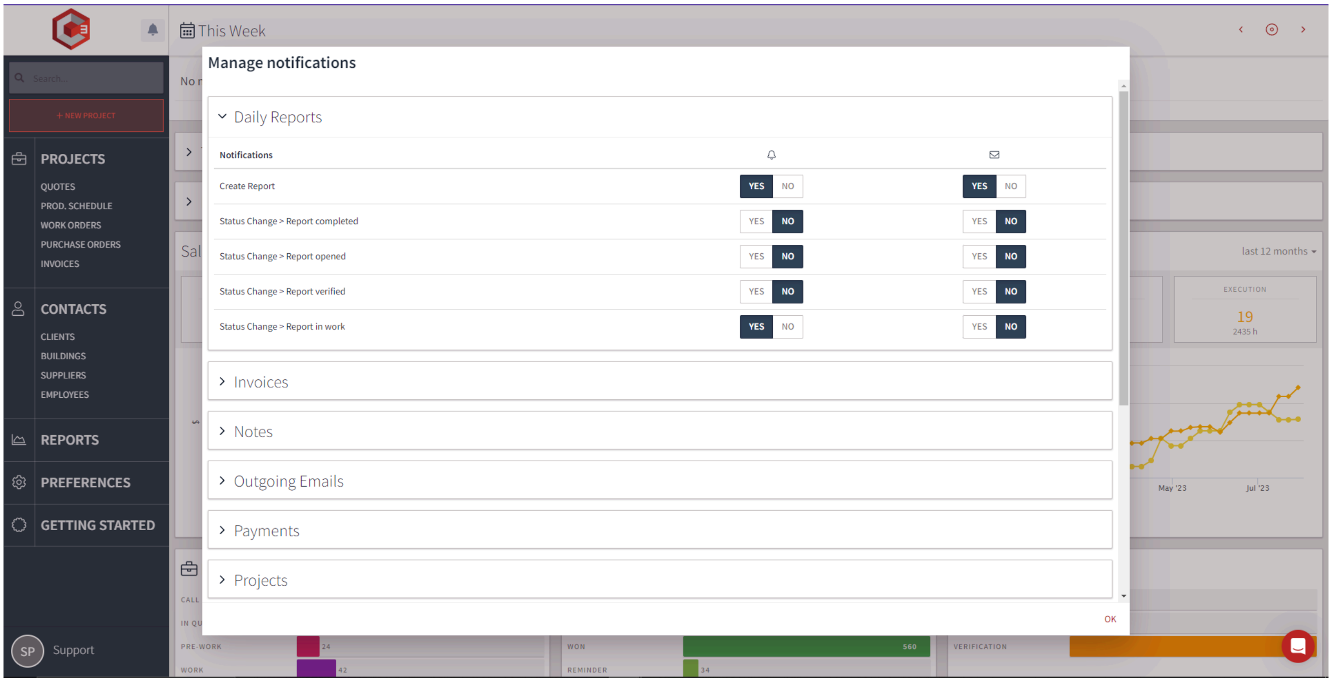
(D) It's possible to modify the time period above the graph. Several are available including the current year, every 12 months, last month and last week.

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 untaken 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.



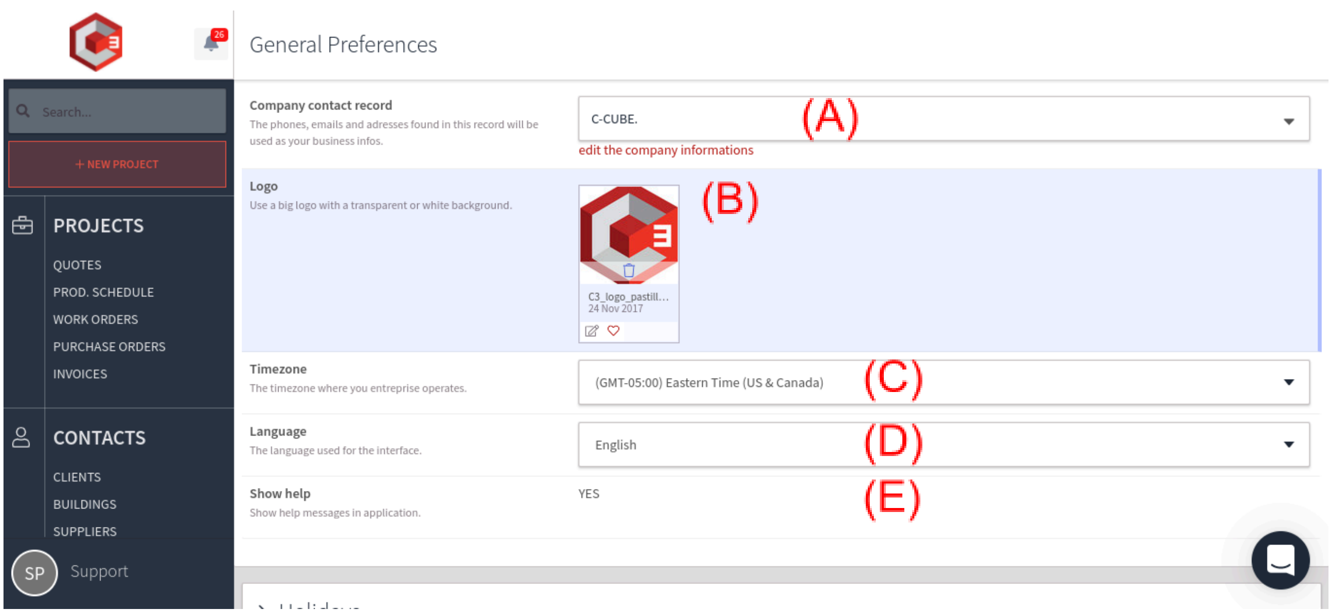


3. General preferences

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

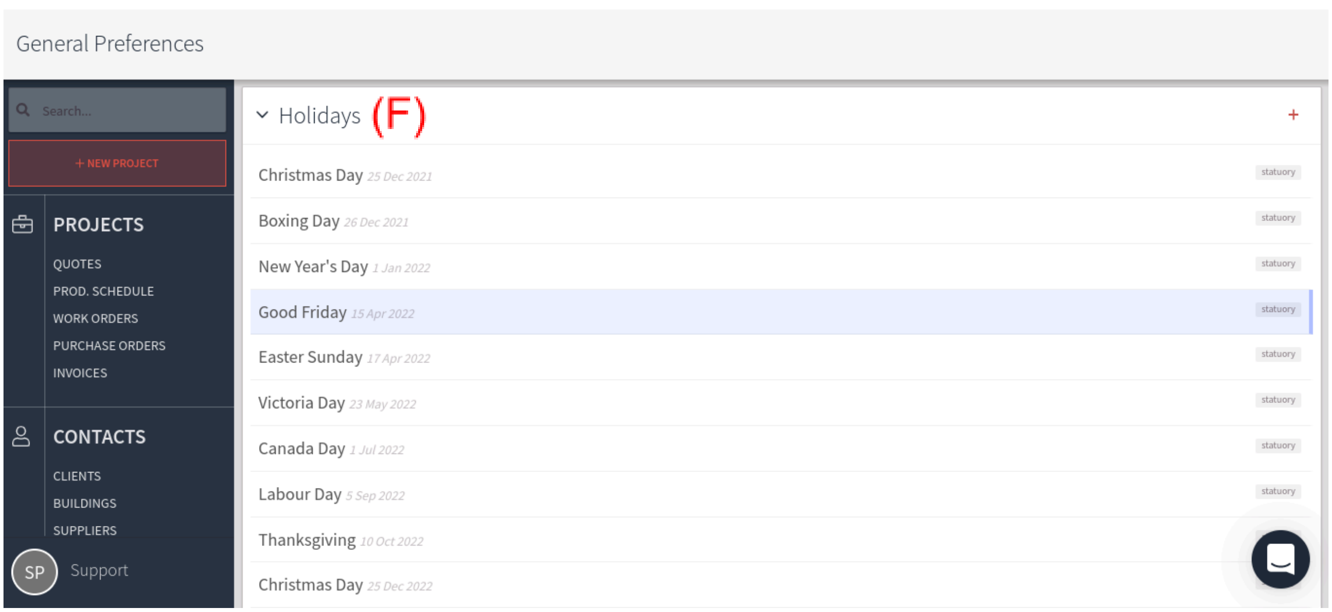
(D) Choose between the two possibilities that are offered, French and English. The selected language is applicable to all the functionalities of the interface. Please note that the option is also applicable to all users of the same company.

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

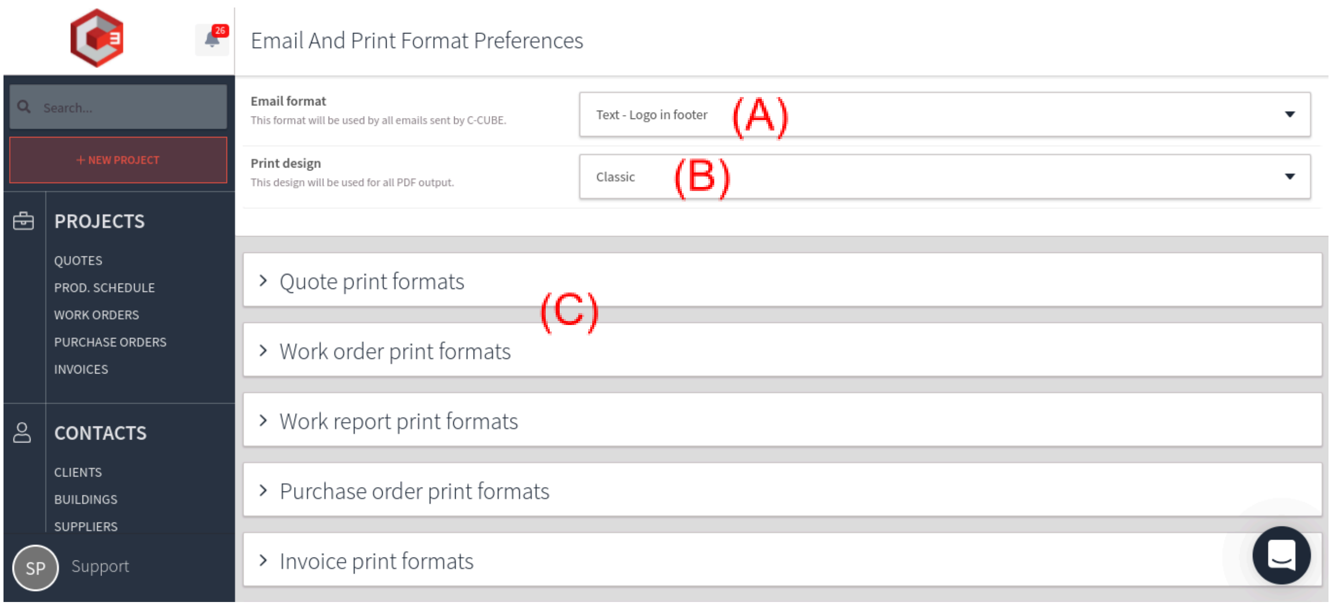
All the days off and holidays are listed in this section.



(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

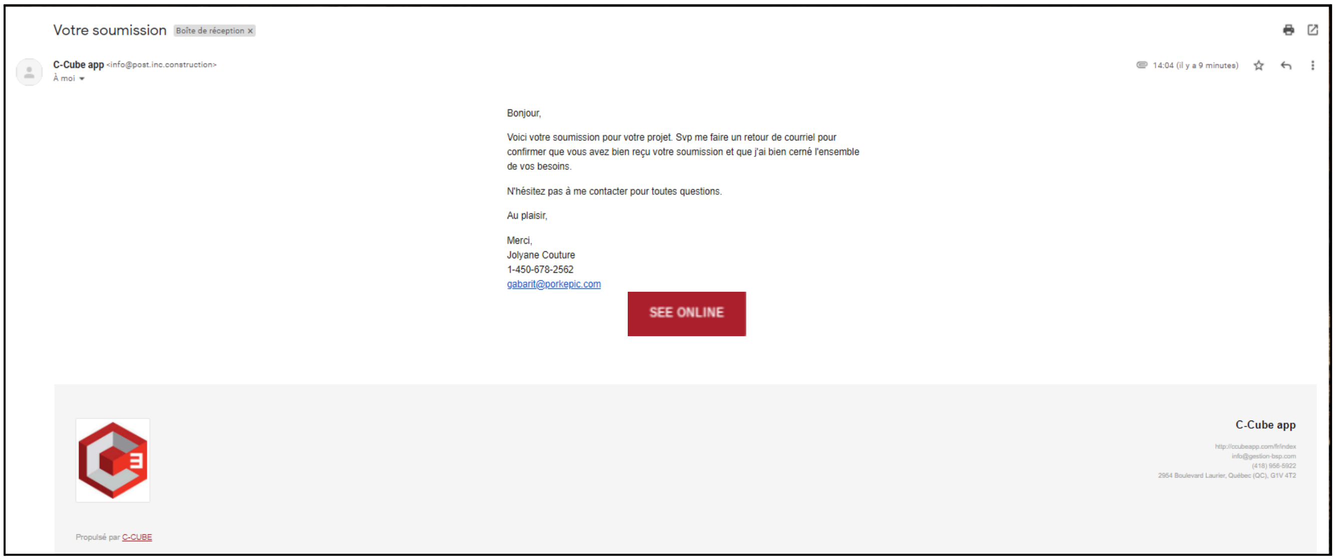
All the modifications concerning the display of the documents to be sent can be changed in these preferences.



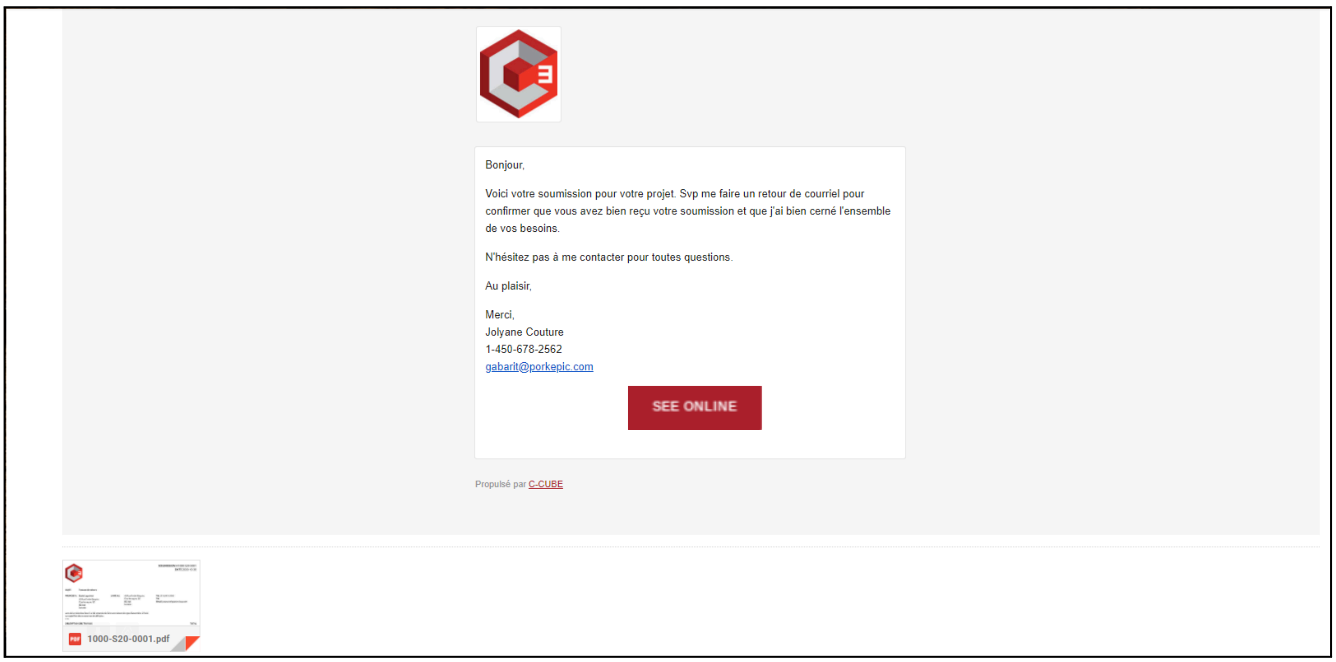
3.2.1. Emails' format

(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

VENTES | PROJETS | RÉFÉRENCES

www.ccubeapp.com
info@ccubeapp.com
1 866 665-1508

SOUMISSION #1000-S20-0001

DATE 2020-10-30

SUJET: **Travaux de toiture**

PROPOSÉ À: **David Lapointe**
40 Rue Émile-Despins
Charlemagne, QC
J5Z 3L6
Canada

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

Tél. (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

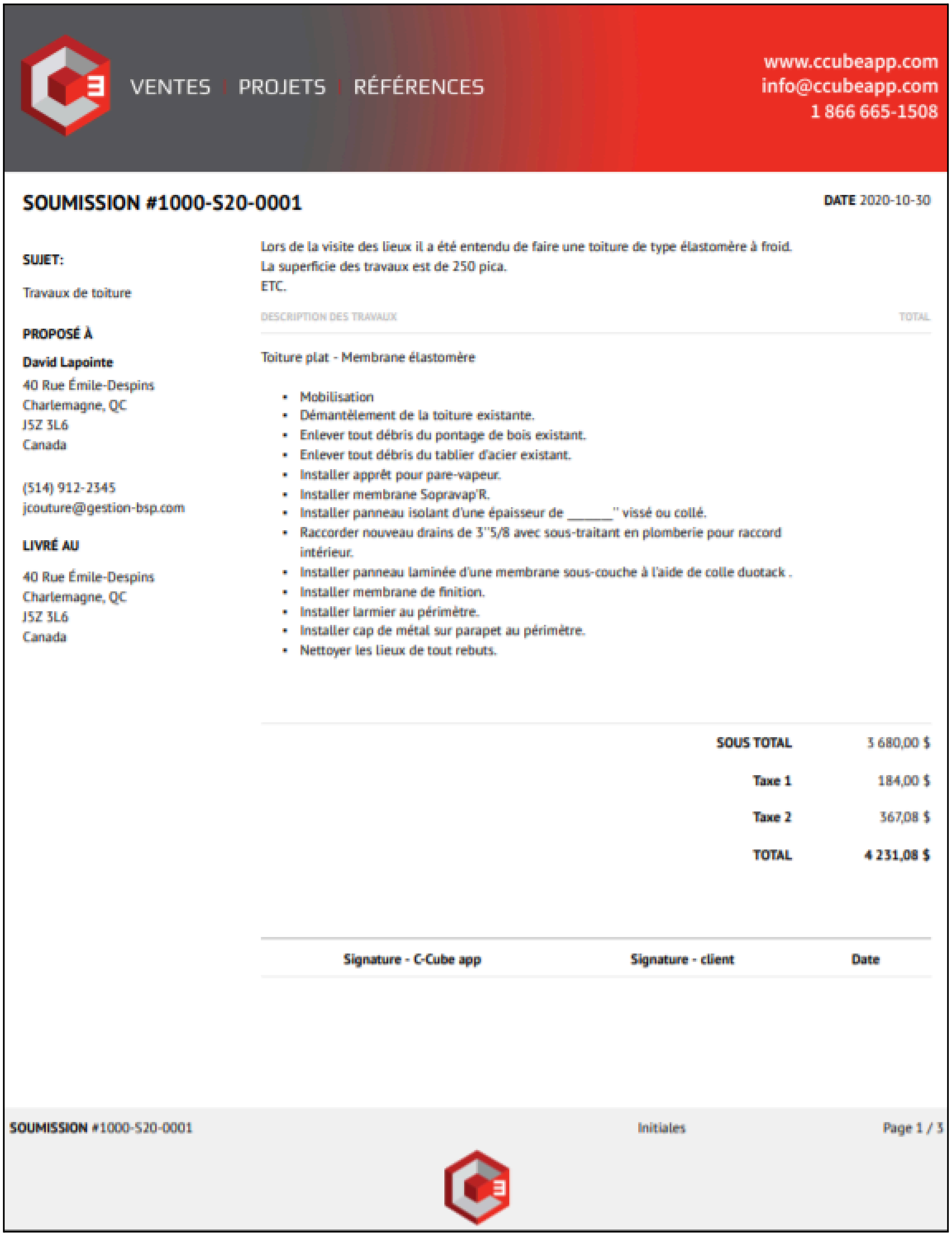
- Mobilisation
- Démantèlement de la toiture existante.
- Enlever tout débris du pontage de bois existant.
- Enlever tout débris du tablier d'acier existant.
- Installer apprêt pour pare-vapeur.
- Installer membrane Sopravap'R.
- Installer panneau isolant d'une épaisseur de ______" vissé ou collé.
- 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



VENTES | PROJETS | RÉFÉRENCES

www.ccubeapp.com
info@ccubeapp.com
1 866 665-1508

SOUMISSION #1000-S20-0001 — **DATE** 2020-10-30

SUJET:

Travaux de toiture

PROPOSÉ À

David Lapointe
40 Rue Émile-Despins
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Canada

(514) 912-2345
jcouture@gestion-bsp.com

LIVRÉ AU

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

Lors de la visite des lieux il a été entendu de faire une toiture de type élastomère à froid.
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DESCRIPTION DES TRAVAUX	TOTAL
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- 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.
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- Installer cap de métal sur parapet au périmètre.
- Nettoyer les lieux de tout rebuts.

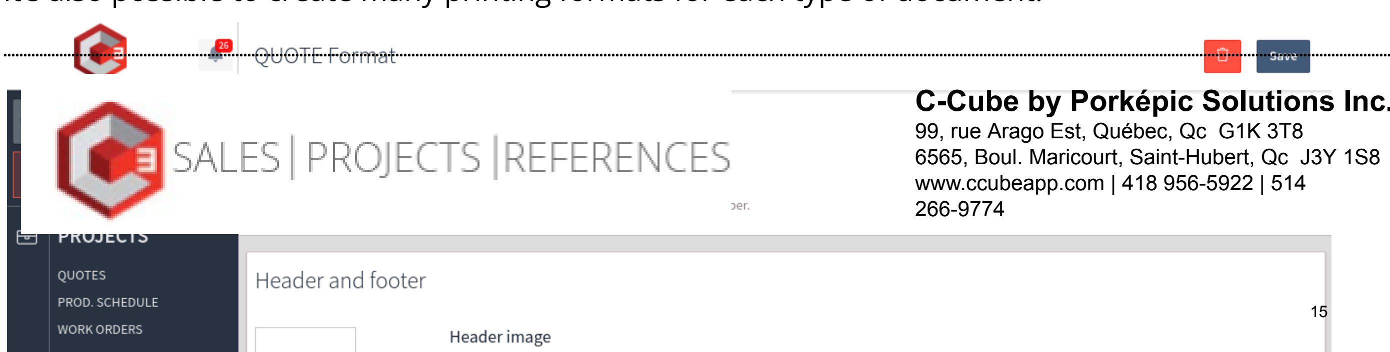
SOUS TOTAL	3 680,00 $
Taxe 1	184,00 $
Taxe 2	367,08 $
TOTAL	**4 231,08 $**

Signature - C-Cube app	Signature - client	Date

SOUMISSION #1000-S20-0001 Initiales Page 1 / 3

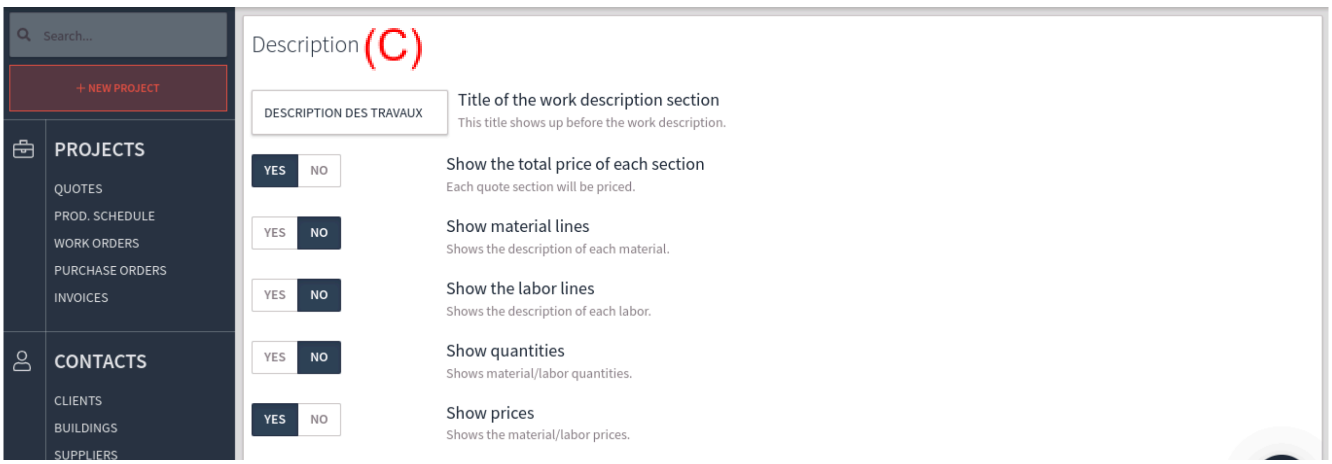
3.2.3. Printing format according to the files

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.



(A)

(B)



(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.

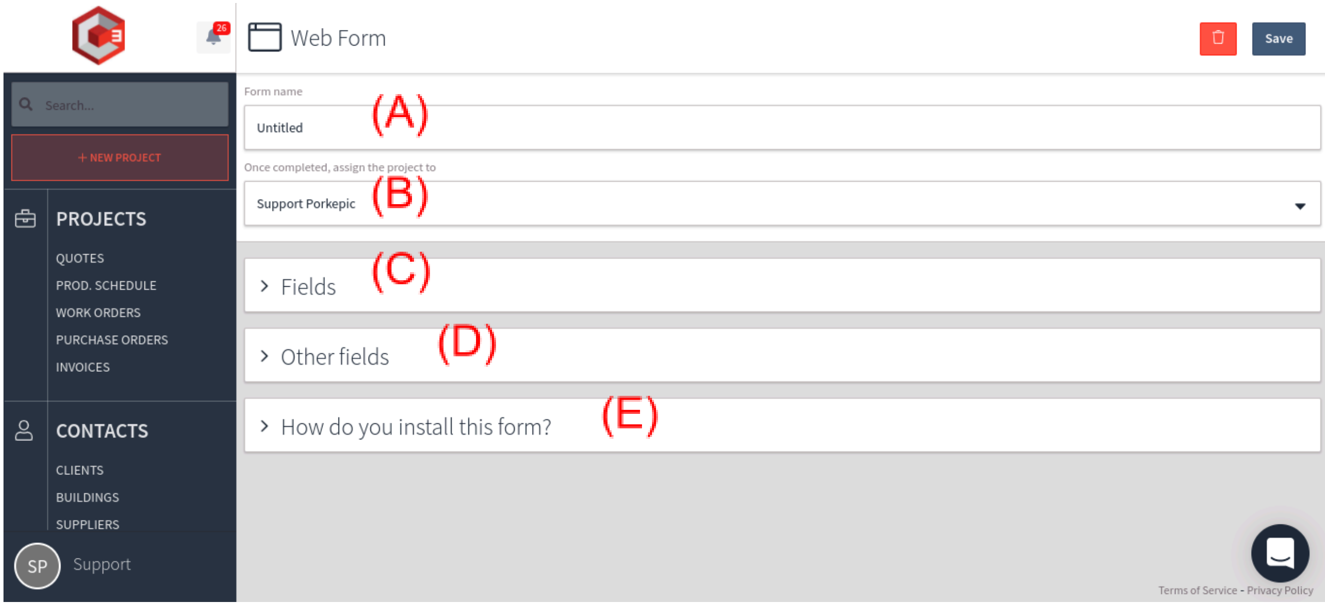
3.3. Web forms

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.

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



(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

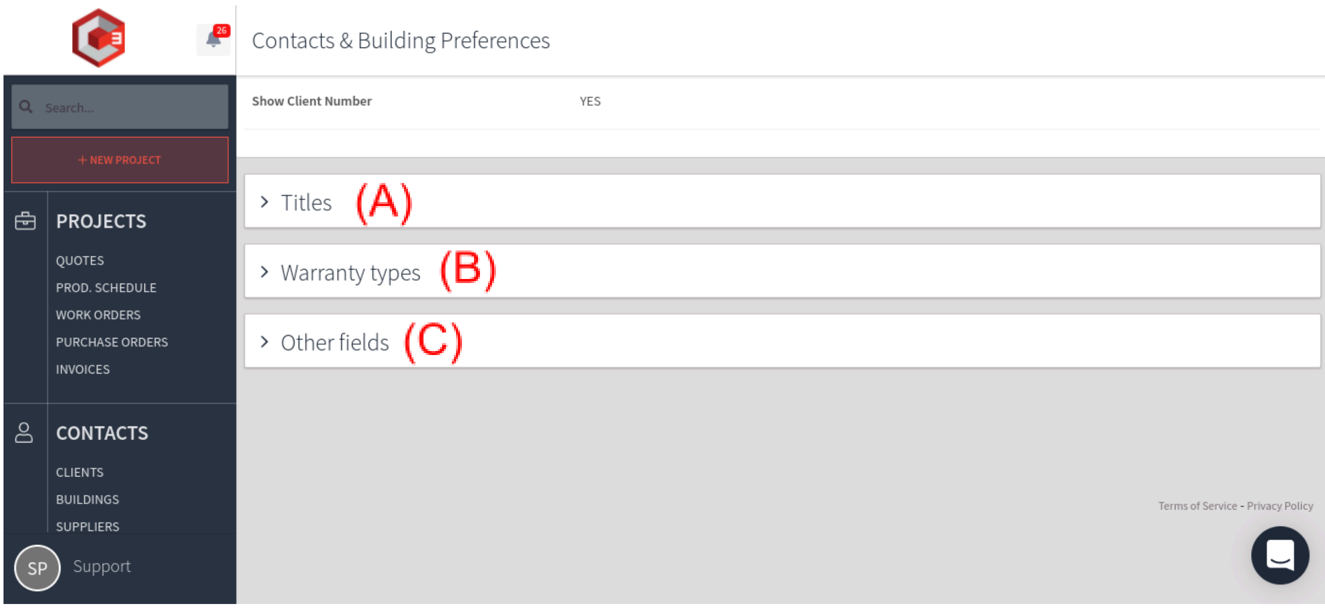
To install this form, you need to know HTML and CSS in order to modify your web page. **We strongly suggest that you contact your website administrator to make the changes.**

(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.



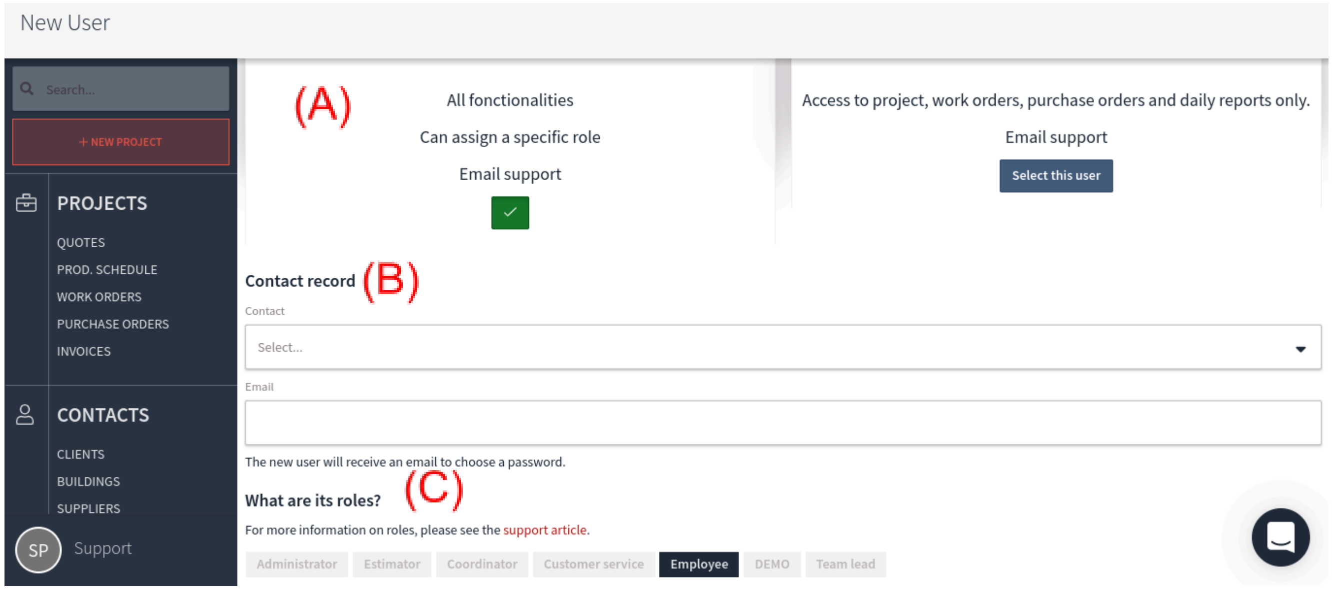
(A) Select the appropriate title for the client. To create a new one, click on the + on the right.

(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.



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

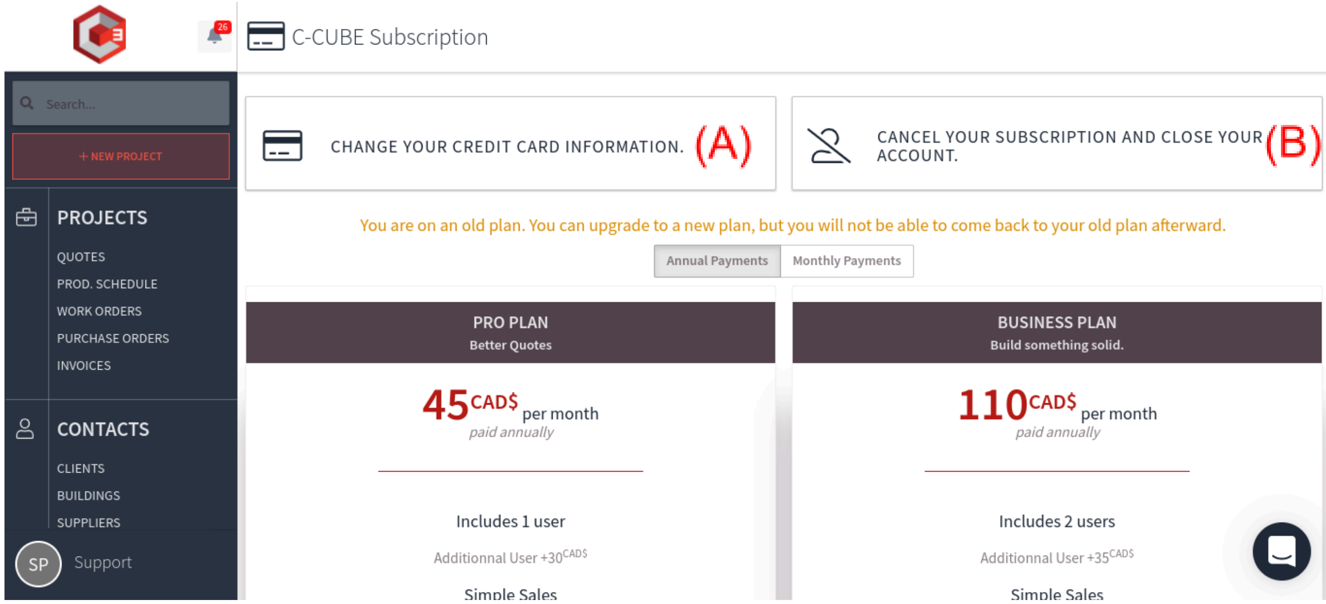
(B) Complete the contact form by entering the employee's name and email. In addition, the password can also be modified in this tab.

(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.



(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.

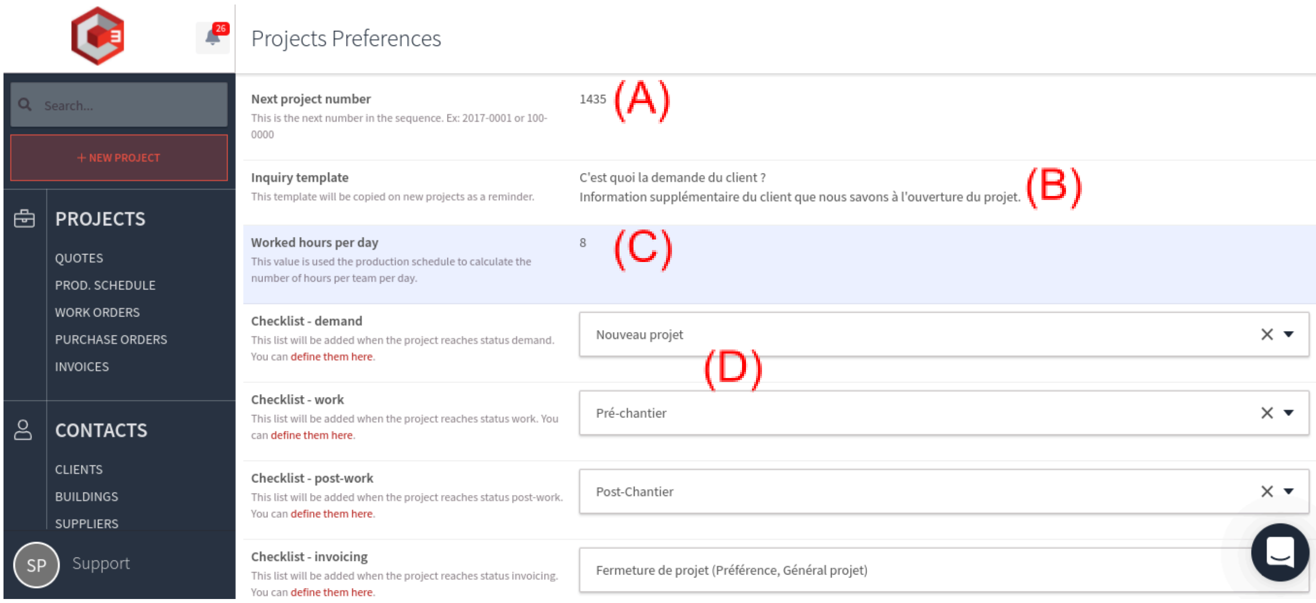
Your text	The result
# Header 1 ## Header 2 ### Header 3	**Header 1** **Header 2** **Header 3**
Hi, I'm **bold* and *italic* and even ~~strikethrough~~.	HI, I'm **bold** and *italic* and even ~~strikethrough.~~
Here is a [link](www.google.com).	Here is a link.
- item - item - item	• item • item • item
1. item 1. item 1. item	1. item 2. item 3. item
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.

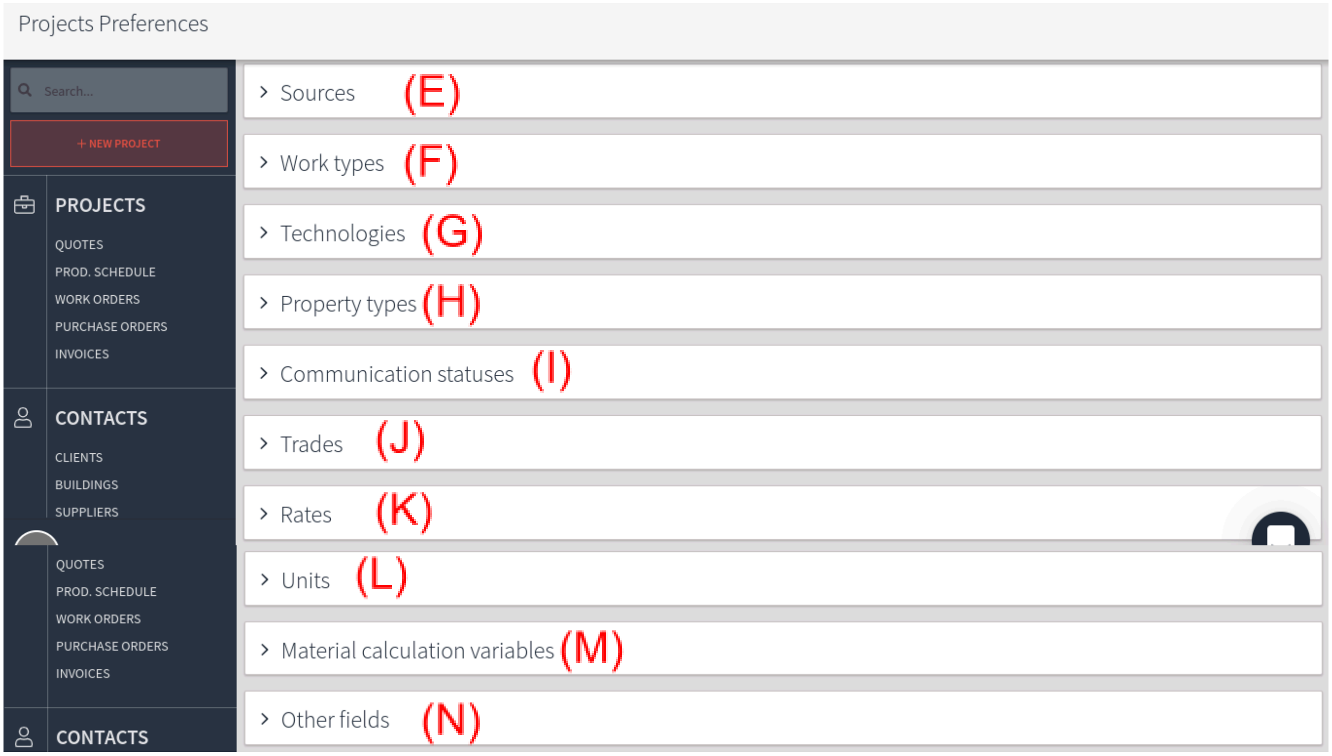
(B) Create an inquiry template.

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:



(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.

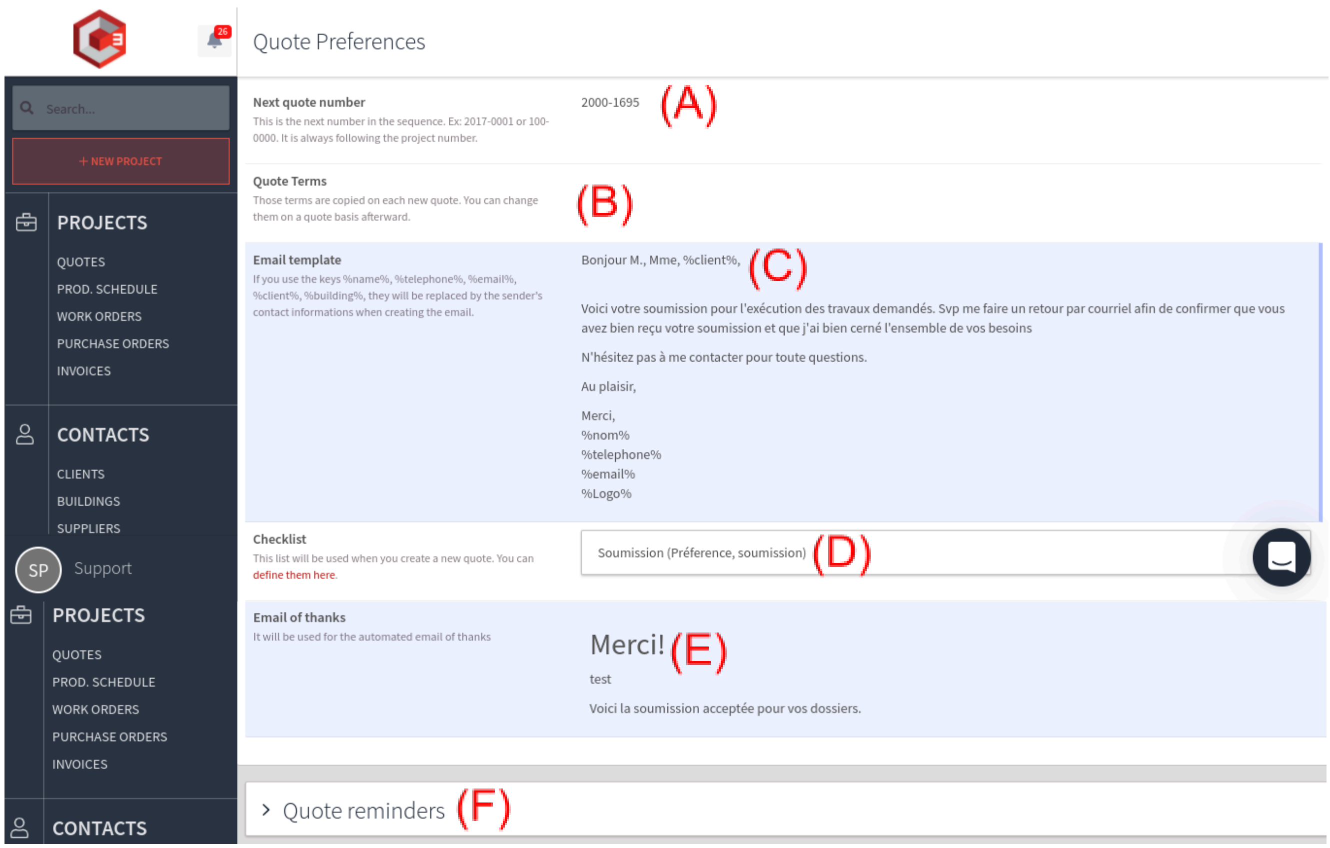
(M) Material calculation variables (surface, length, volume, etc.) They are used to make calculations in assemblies.

(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.

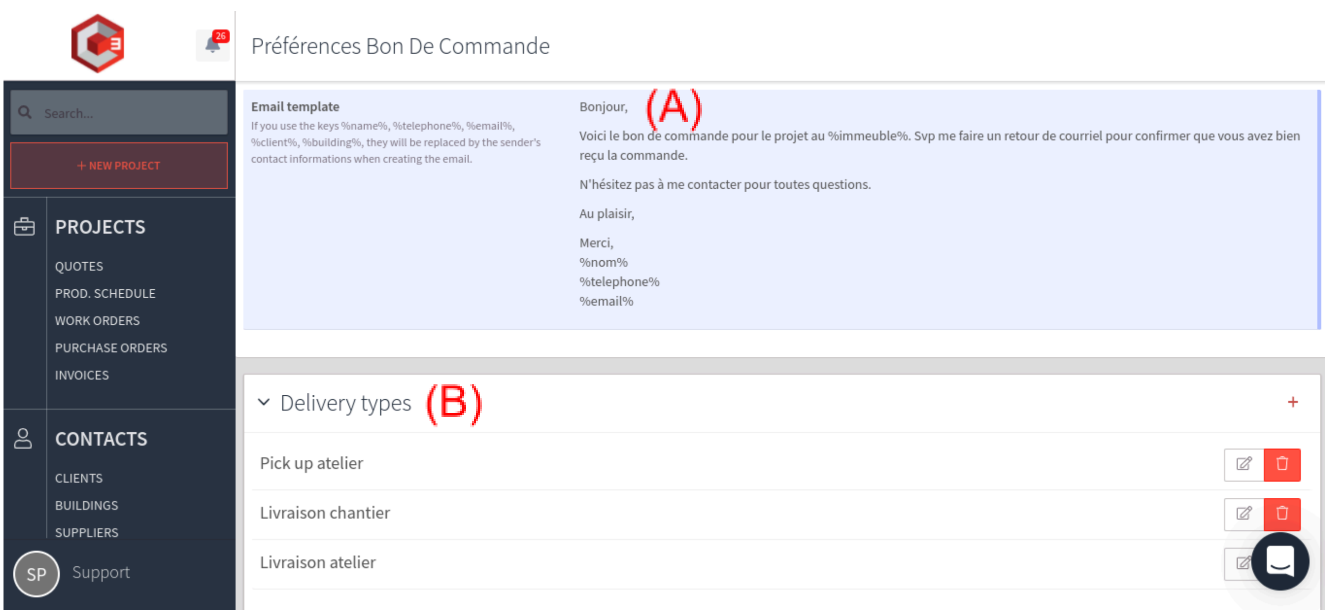
(E) Develop a thank you email template; the email is sent automatically.

(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.



(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.

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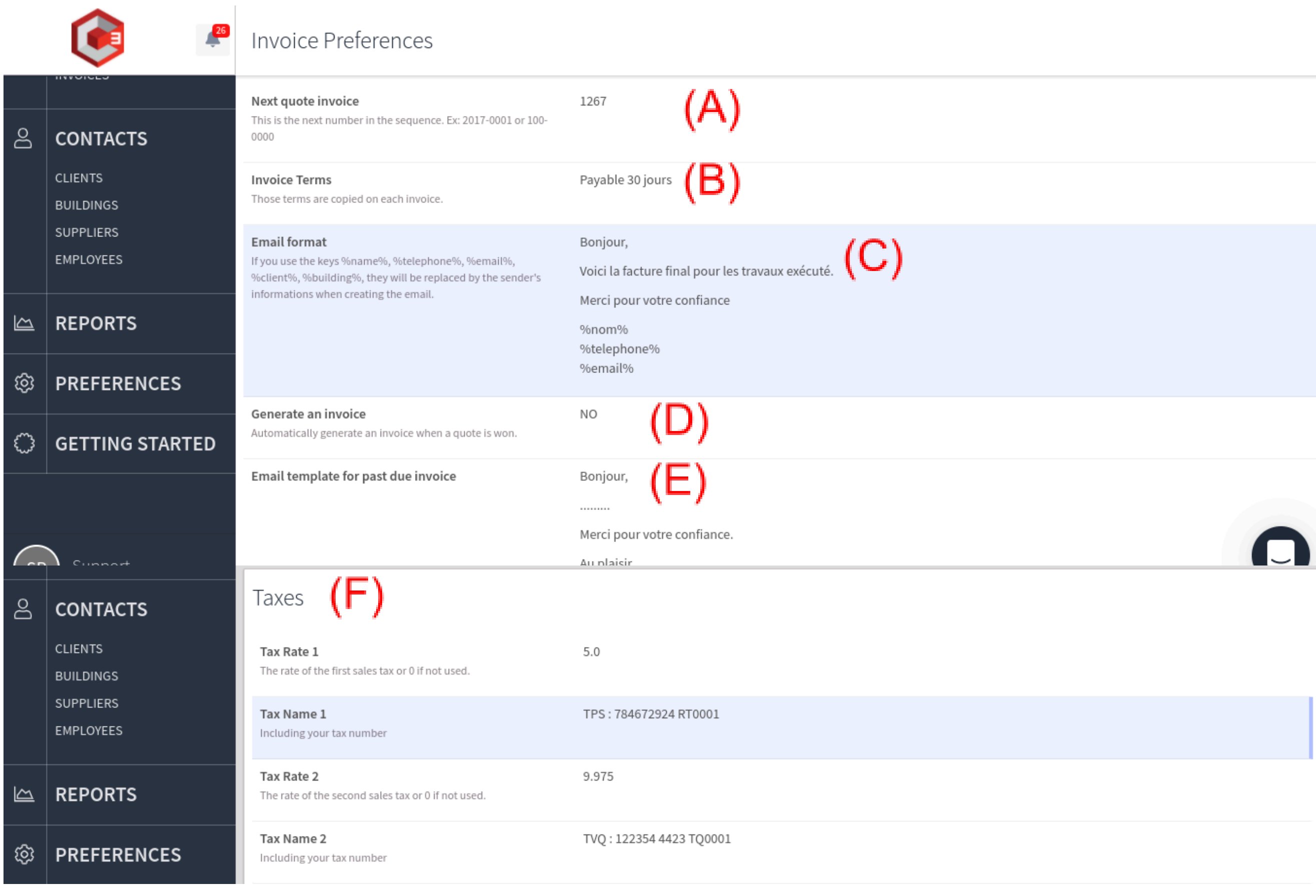
(B) Create the delivery types to be applied on the purchase orders when sending. (Site delivery, workshop delivery, to take away)

5.4. Invoicing

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



(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.

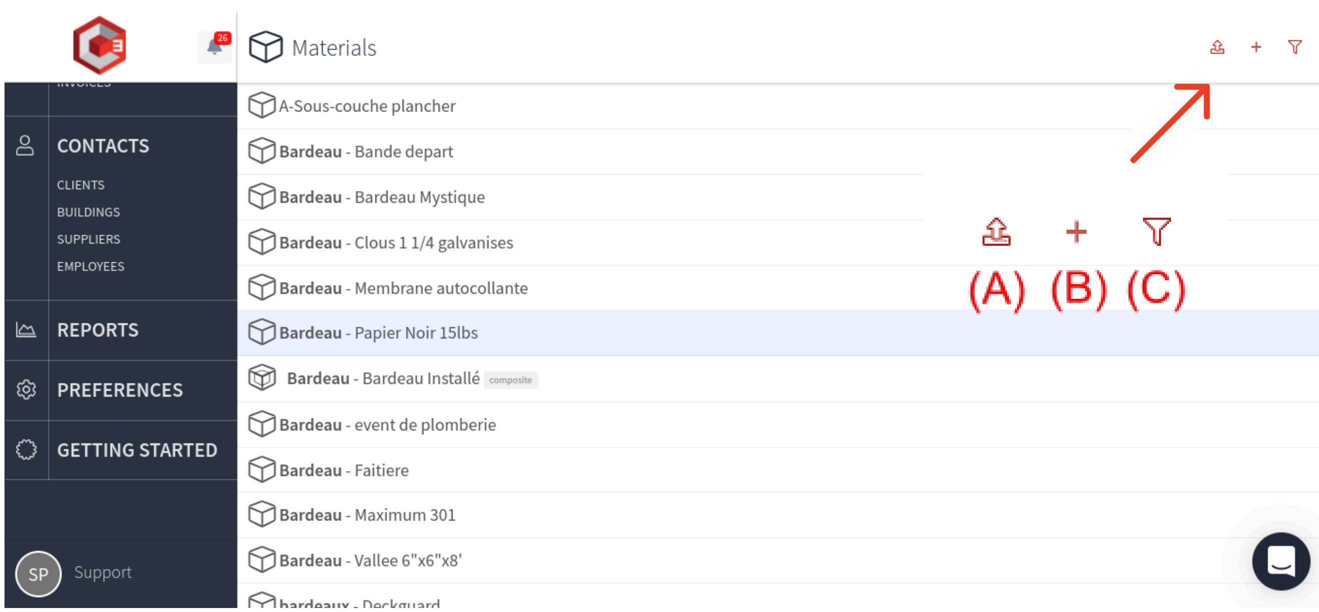
5.5. Materials

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*.

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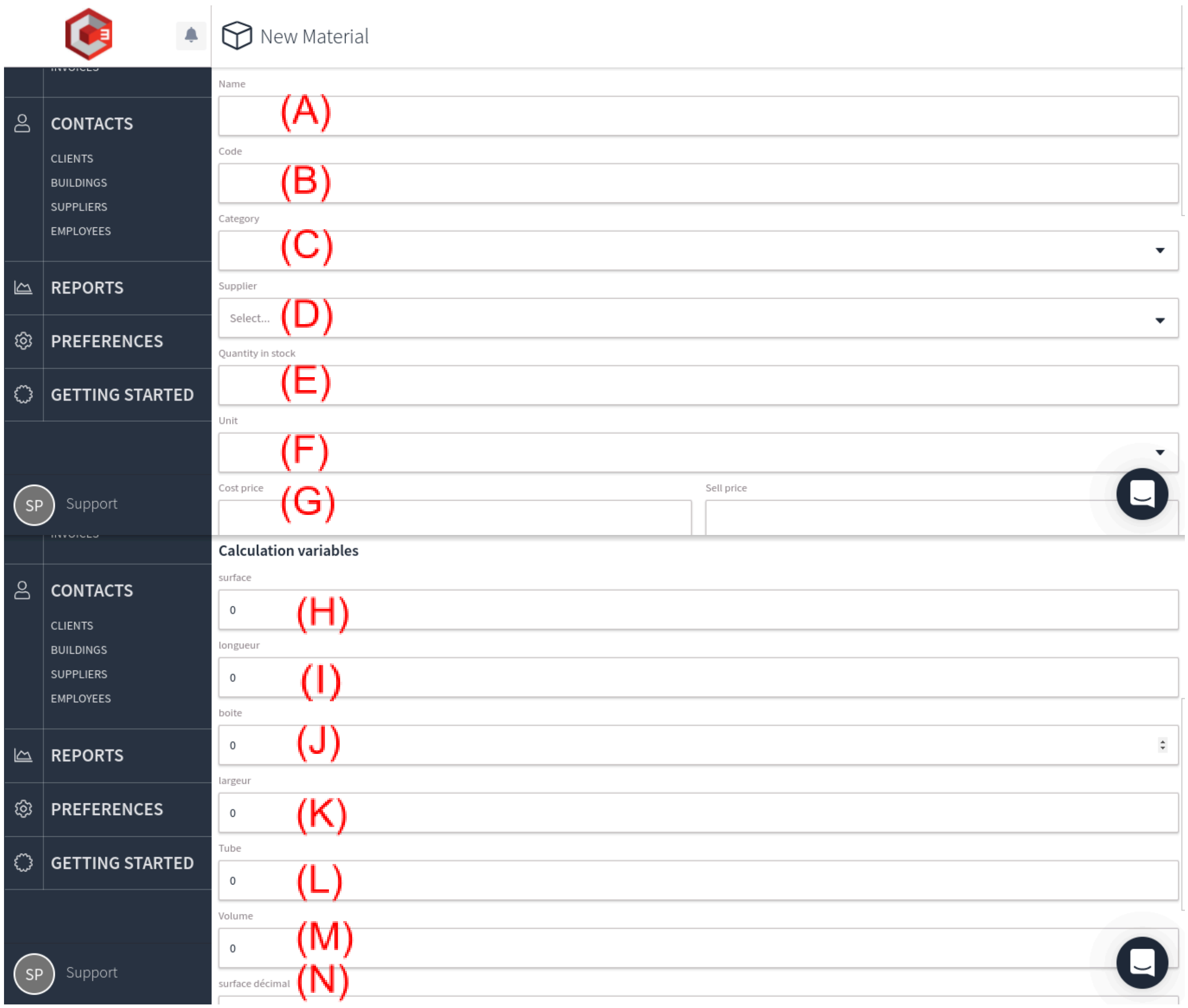
(B) Create a new material by selecting the + at the top right. You must choose between a material or a composite material, choosing the most appropriate one according to the use.

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

Material

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) IIndicate the length of the material used.

(J) Mention how many units there are per box.

(K) Indicate the width of the material used.

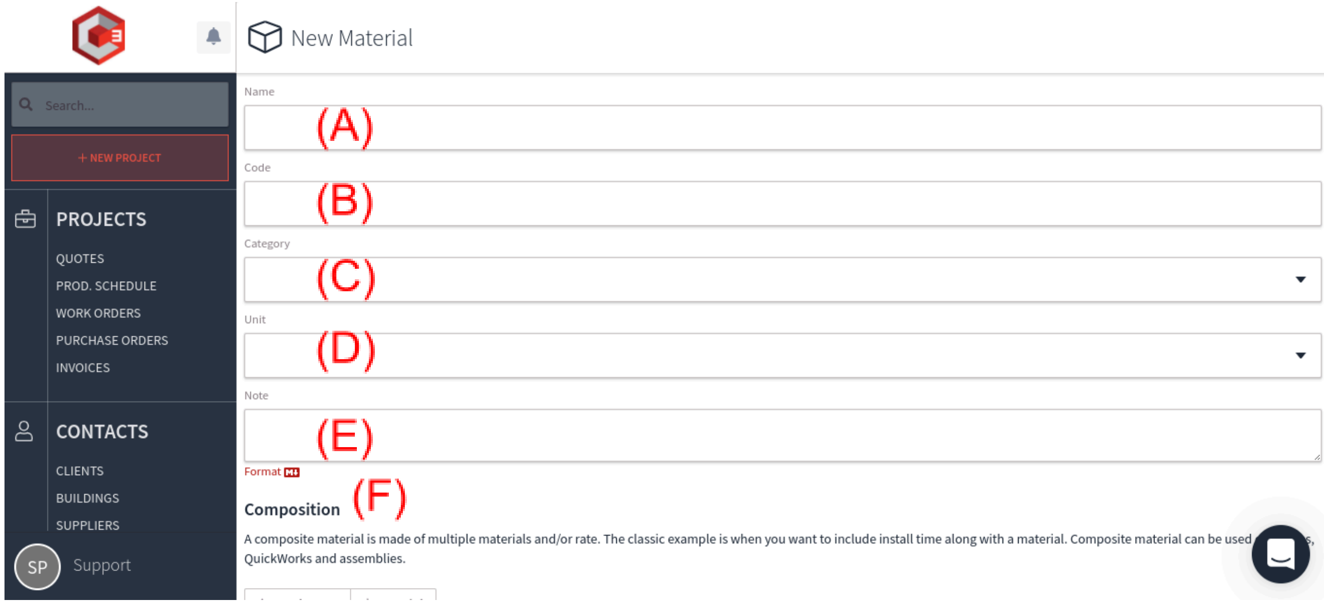
(L) Mention how much product per tube or the number of tubes per box, if necessary, depending on how the assembly is assembled.

(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.



(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.

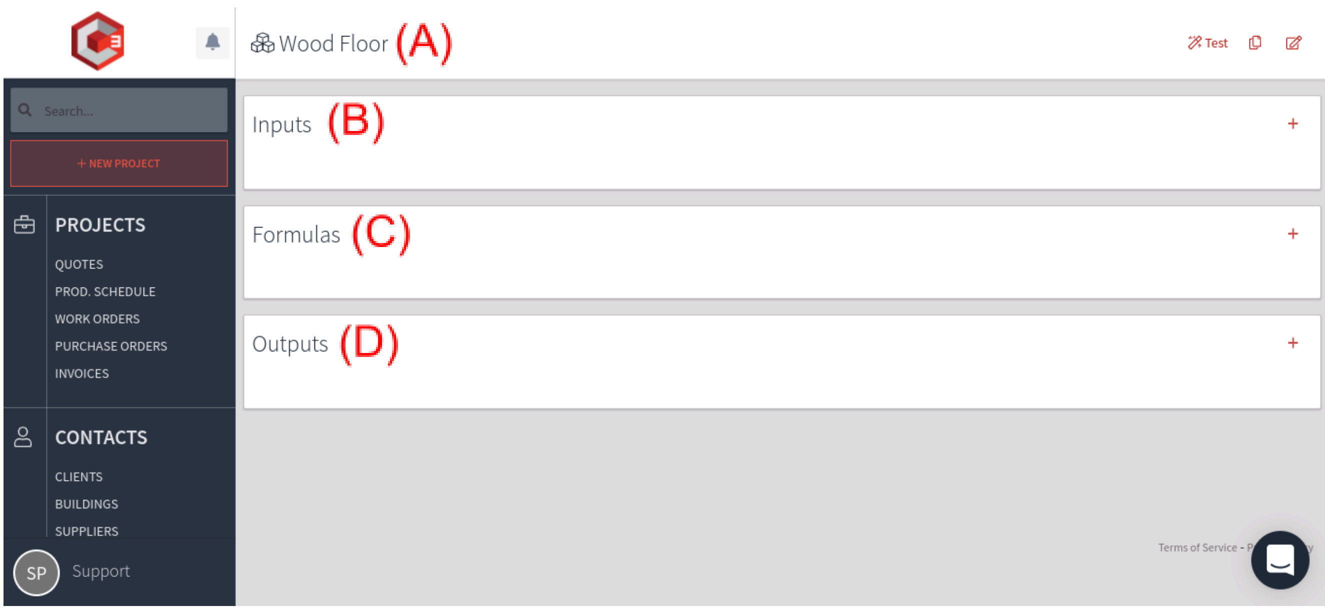
(F) Specify the hourly rate and the material to be used by clicking on their respective buttons. An option named *Composition Factor* is to be filled in.

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 assemblie.

(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

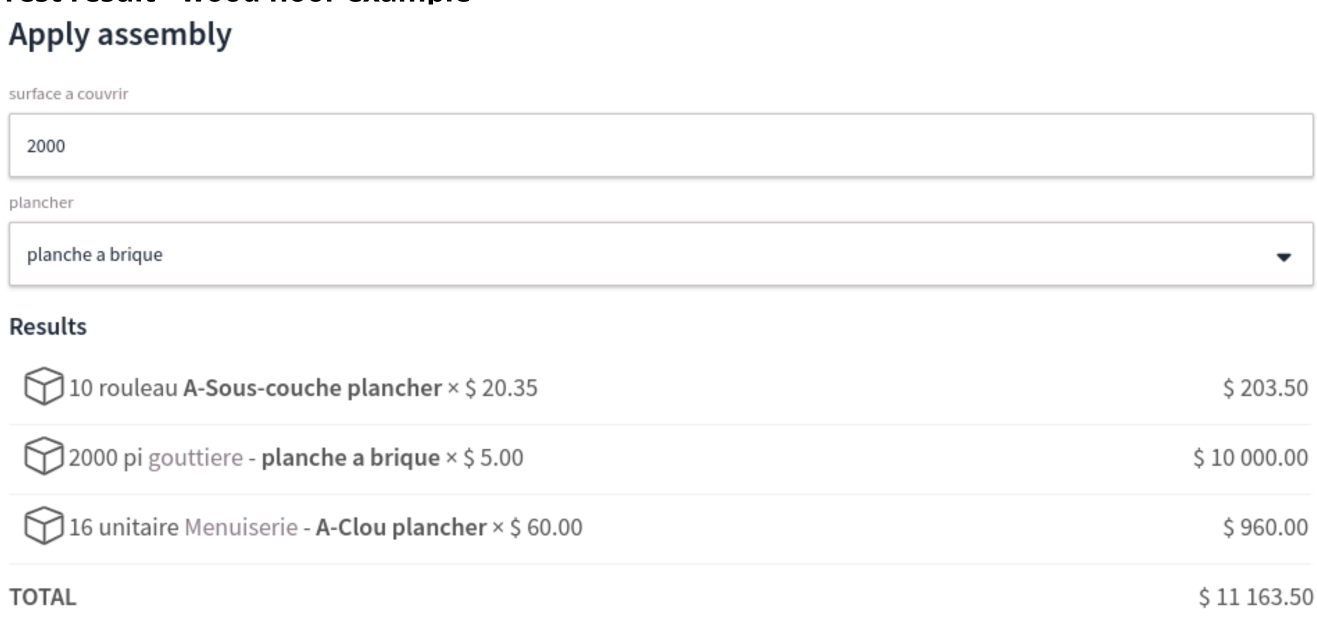
Box of nails = (Area to be covered * Number of nails covering 1sq.ft.) / Number of nails per box

(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*



*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.

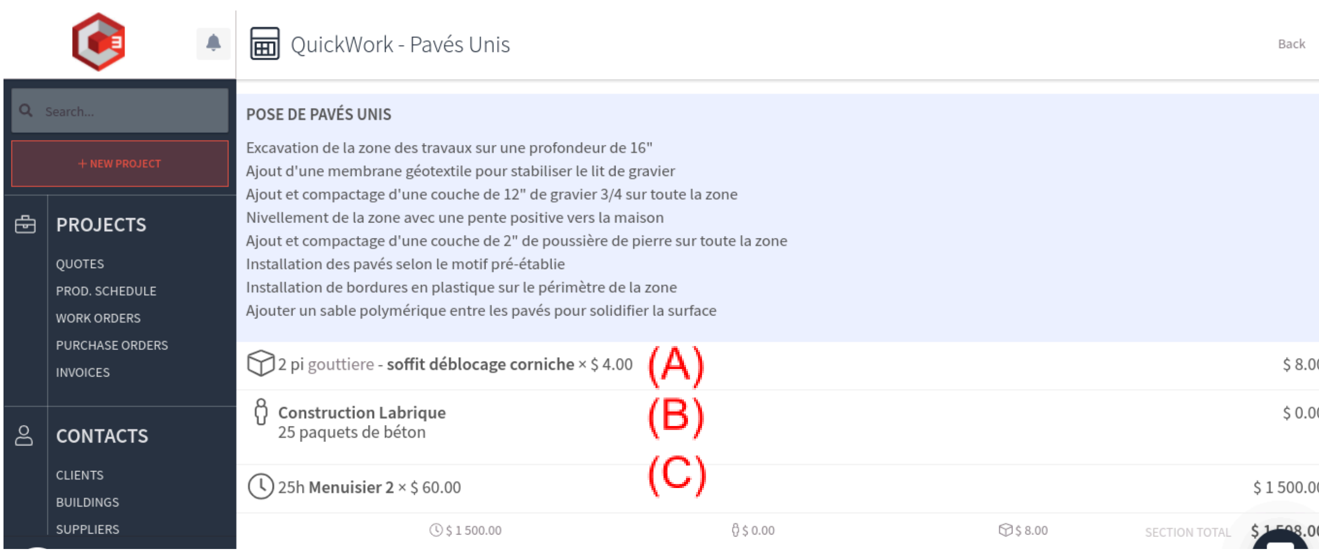
Note that assemblies can be integrated into it to facilitate the calculations. It's also possible to link a checklist or to create a new one for Quickwork.

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.

(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



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(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

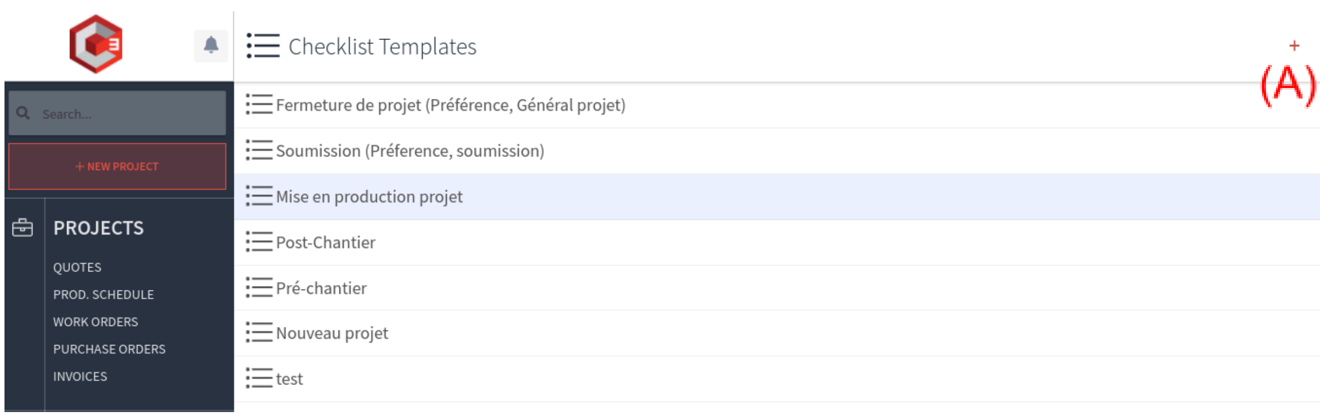
(C) Include completion time based on a pre-set rate for a specific trade.
You have to define:

- 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.

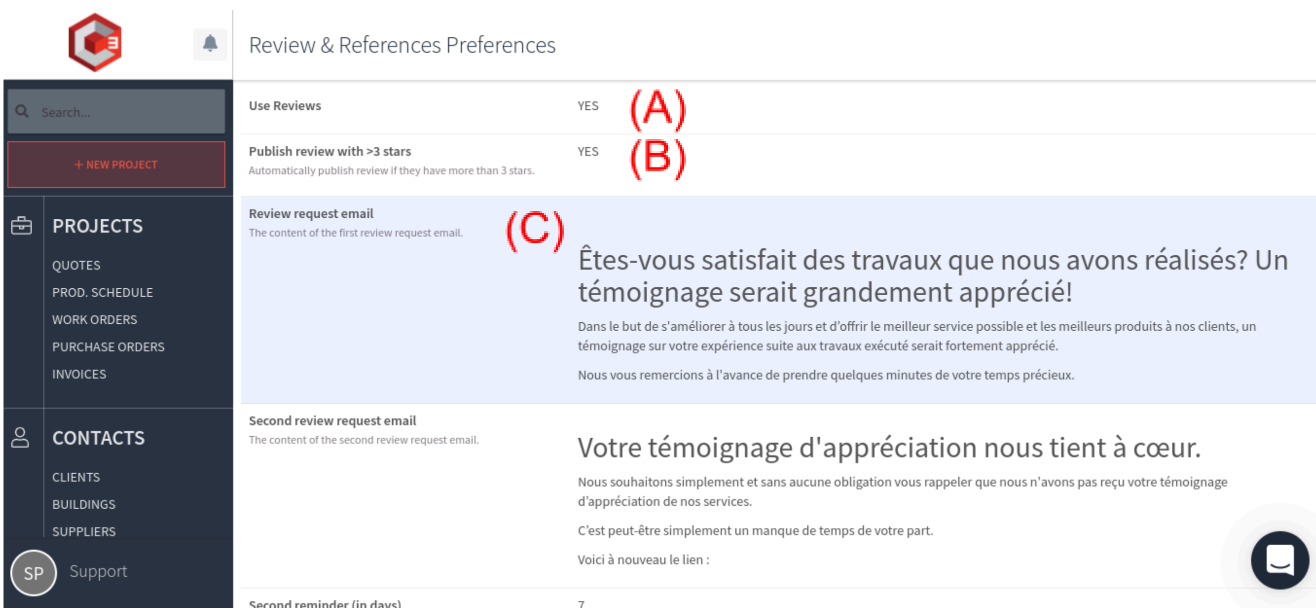
(B) Choose an appropriate name.

(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.

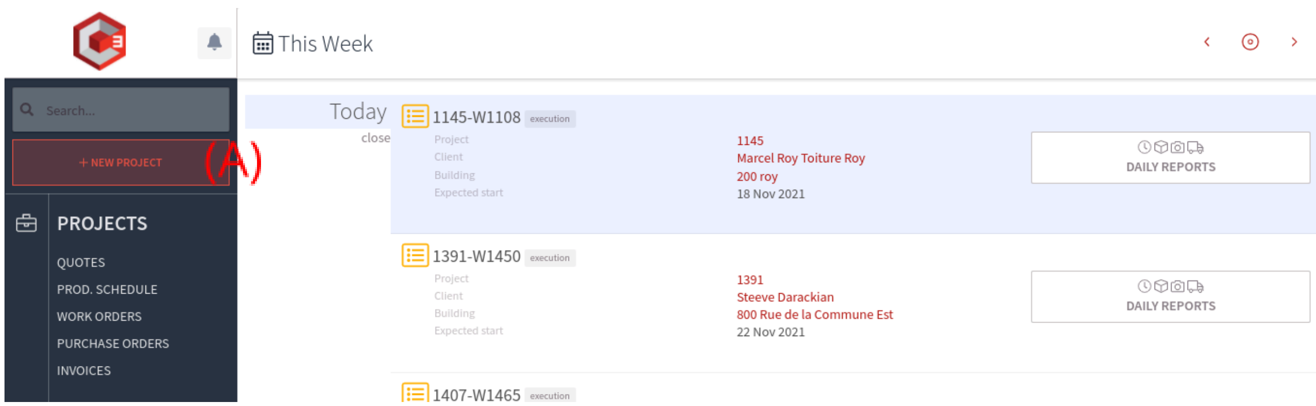
5.9.2. Testimonials

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

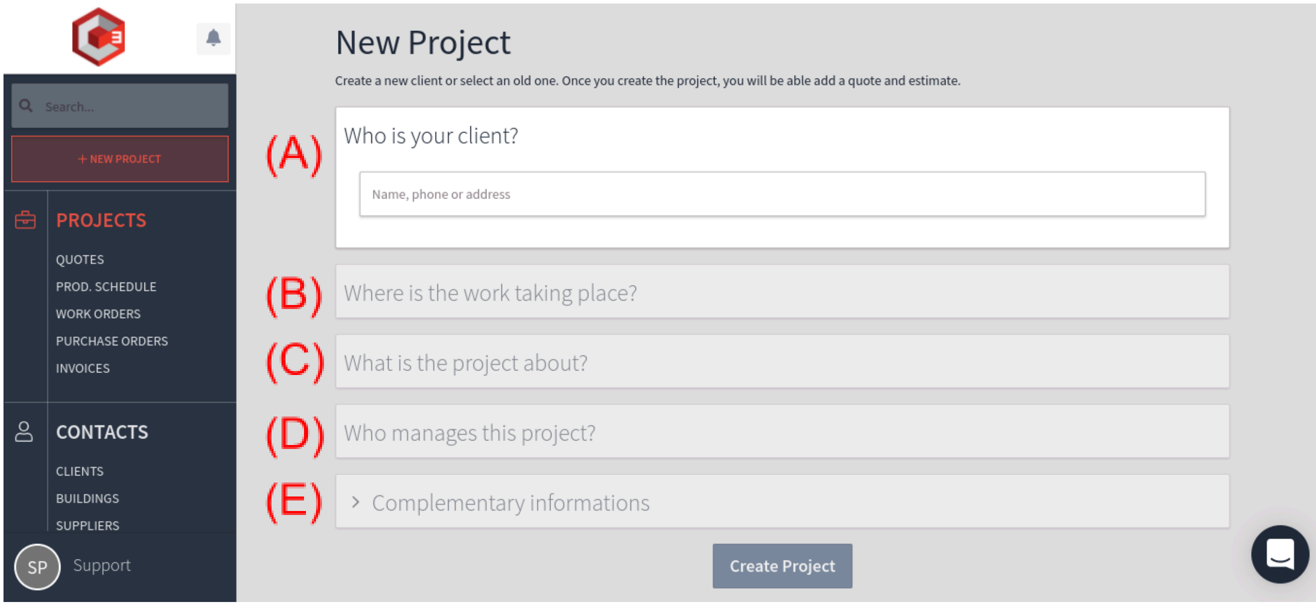
6.1. New project

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:



(A) who is your client

(B) where is the work taking place

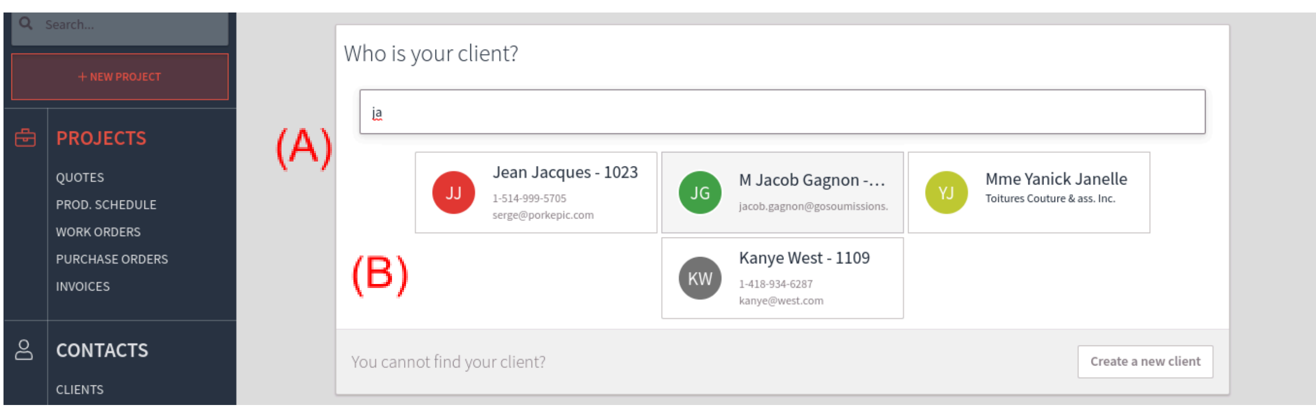
(C) what is the project about

(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.



(C)

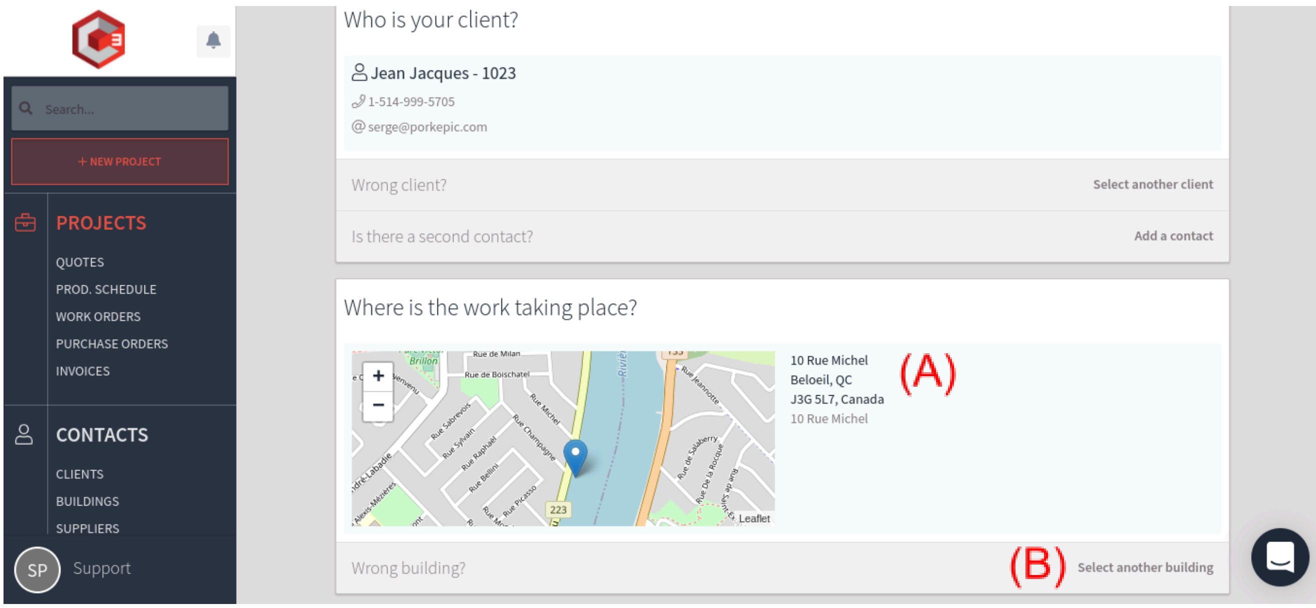
(A) Select the search field for an existing client.

(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

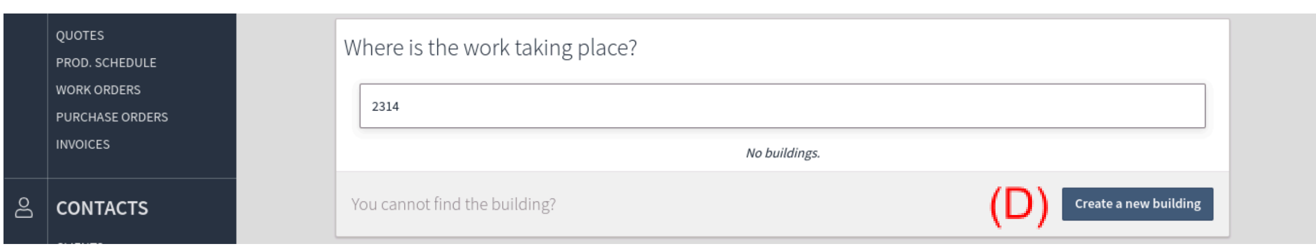
When you choose an existing client:



(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.



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

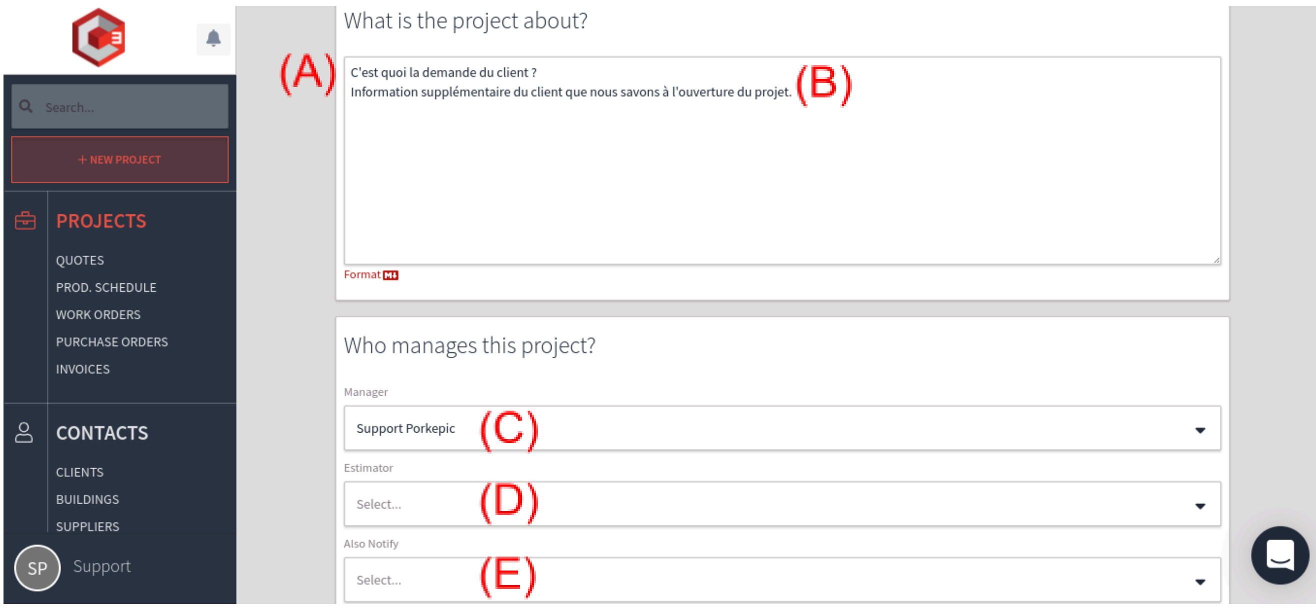
For a new customer

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



(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.

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6.1.4. Who manages this project

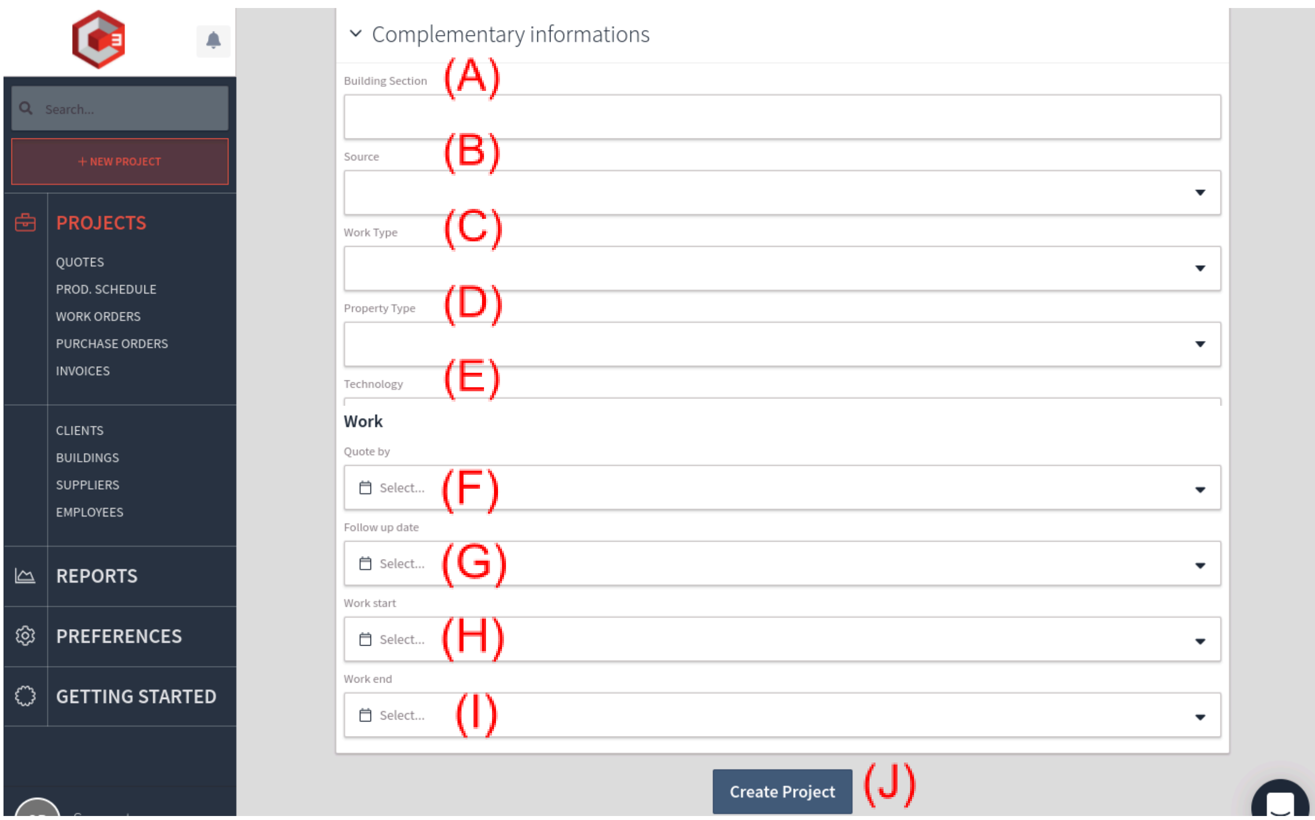
(C) Identify the employee responsible for the project. Remember that the responsible person is the one who creates the project. It’s possible to make a modification for the project manager or the project director.

(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.



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.

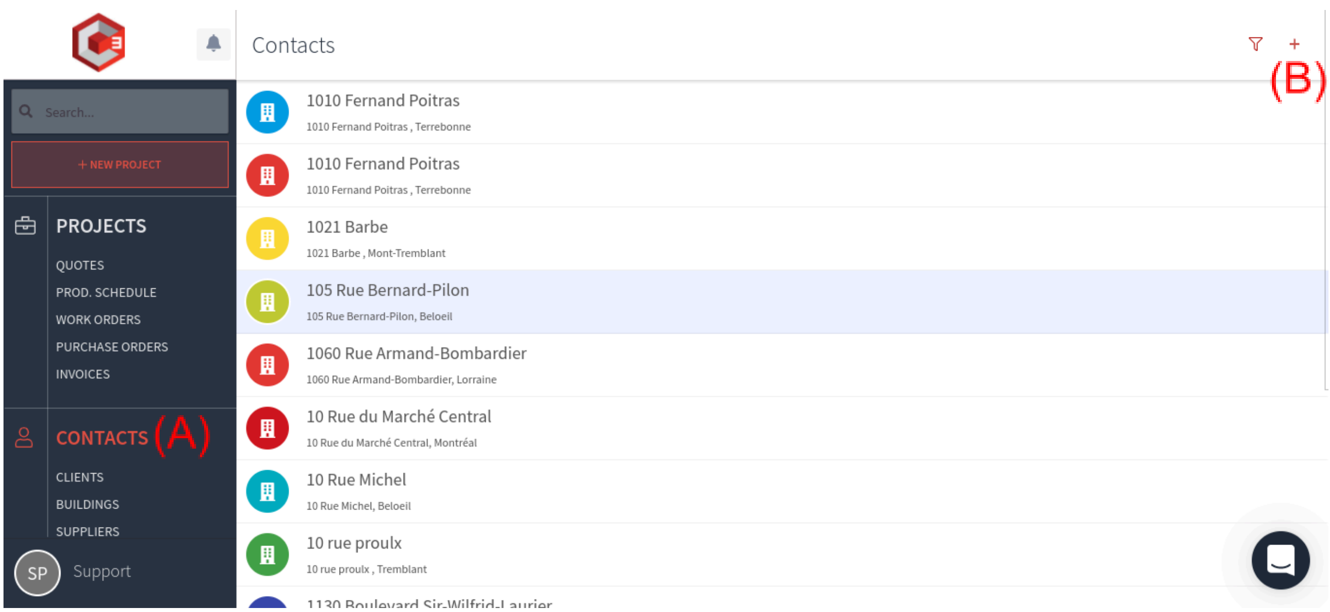
(I) Add the desired ending if the information is known.

(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*.

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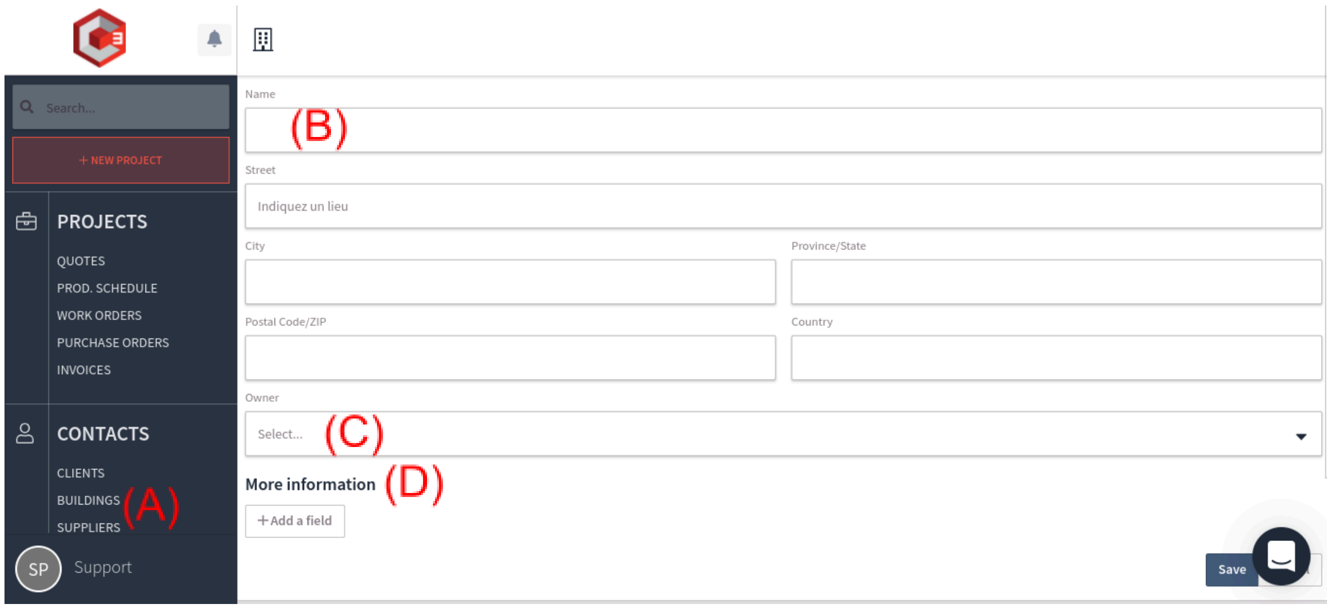
(B) Click on the + at the top right. Then you have to choose between a contact or a company. The difference between the two is that there can be several contacts in the same company.

6.2.2. New building



(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.

(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.

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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.

(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.

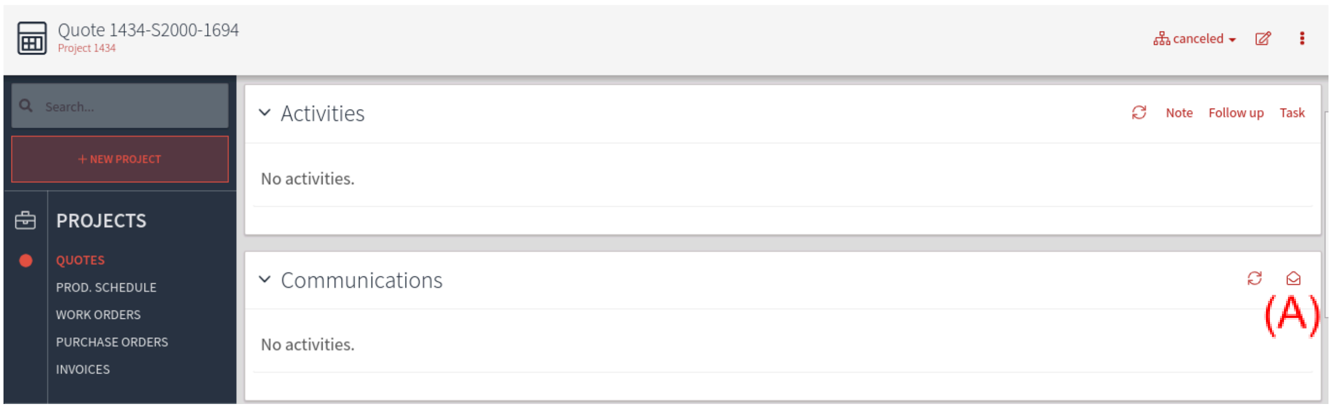
(H) Add a contact photo if you wish.

(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.

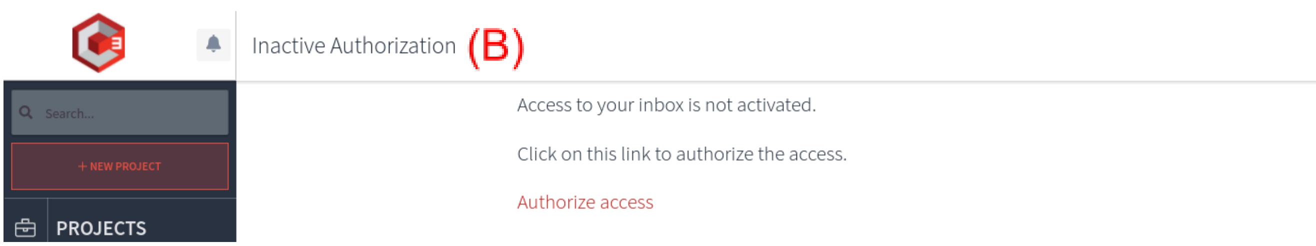
(J) Add additional information in the *More information* section. They can be set up in the Contact & Buildings preferences.

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.

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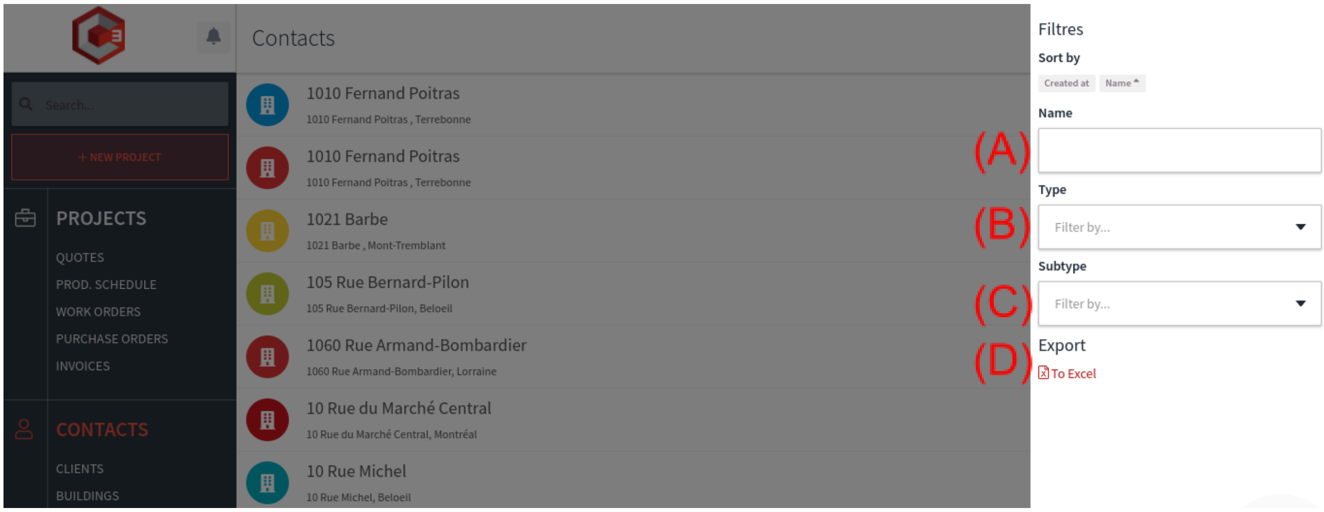
6.2.6. Filters

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.



(A) The name

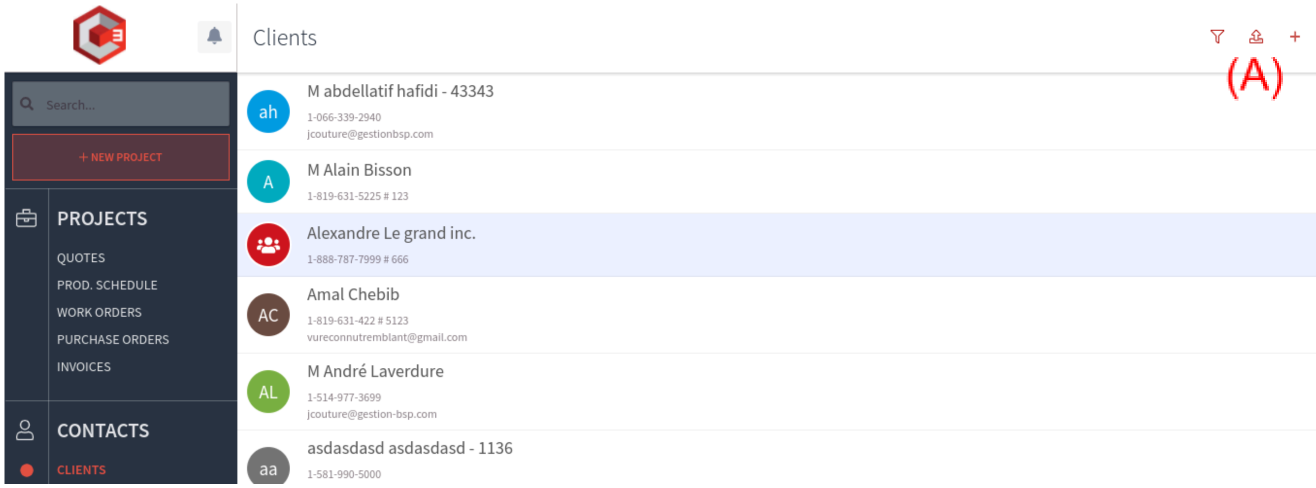
(B) The type (contact, company, or building)

(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

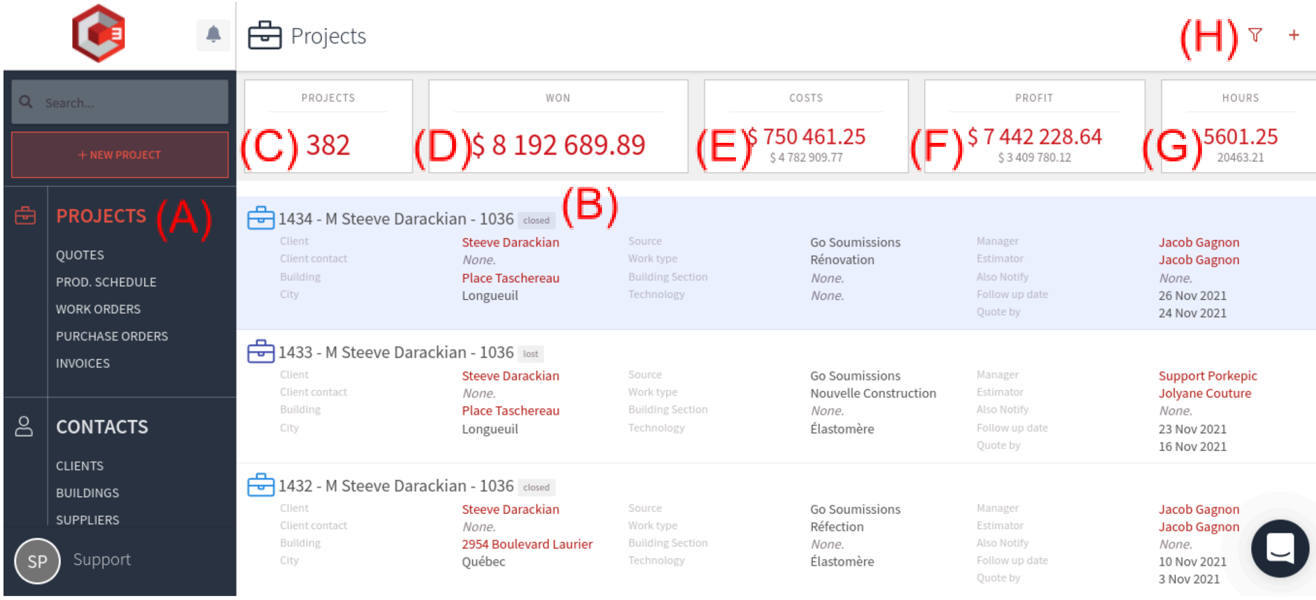
- Draft
- Sent
- Canceled
- Partial

Closed

Invoice

- Closed

7.2. Quotes' list



(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.

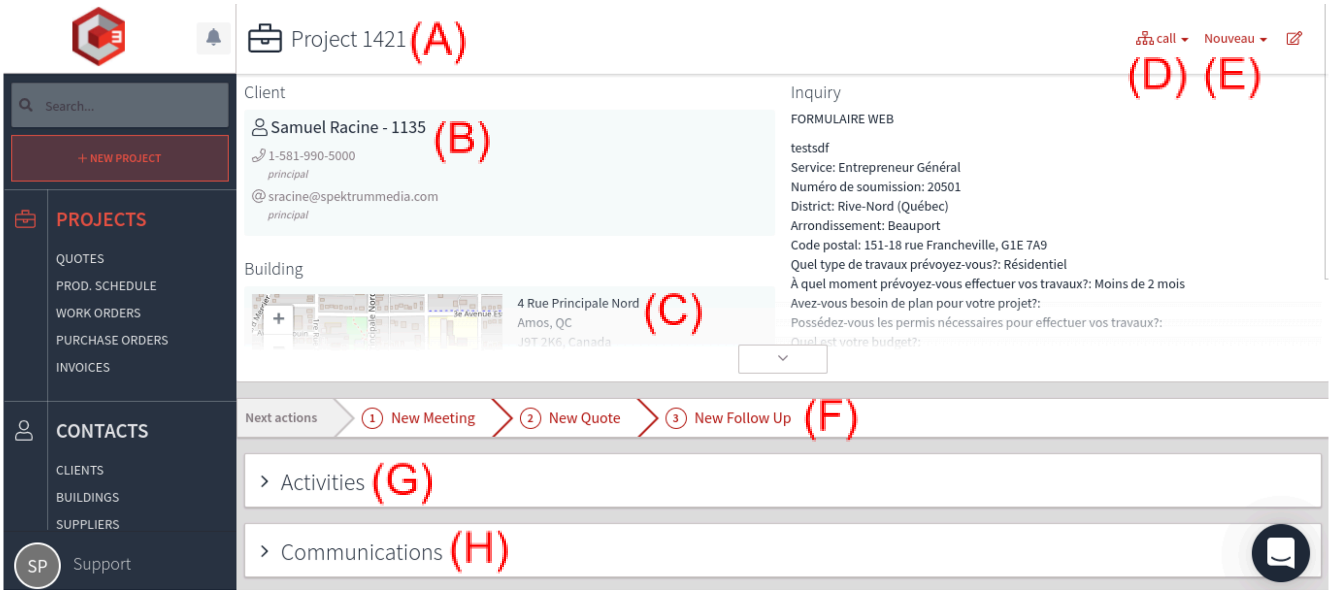
(F) The profits generated by the projects.

(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.



(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).

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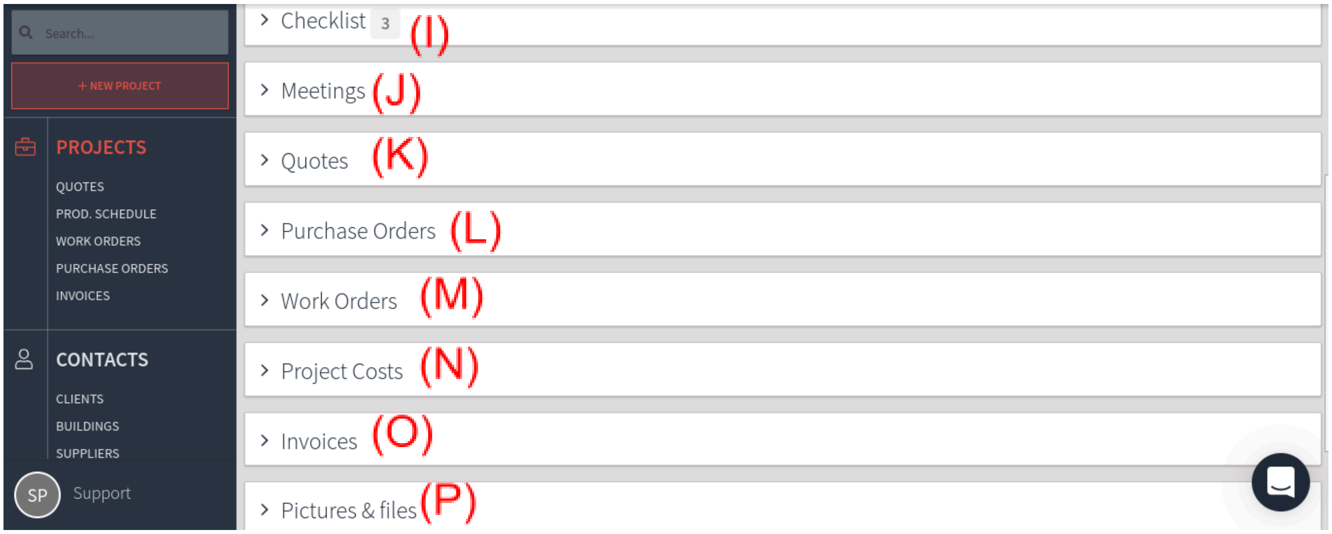

(I) The checklist.

(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.

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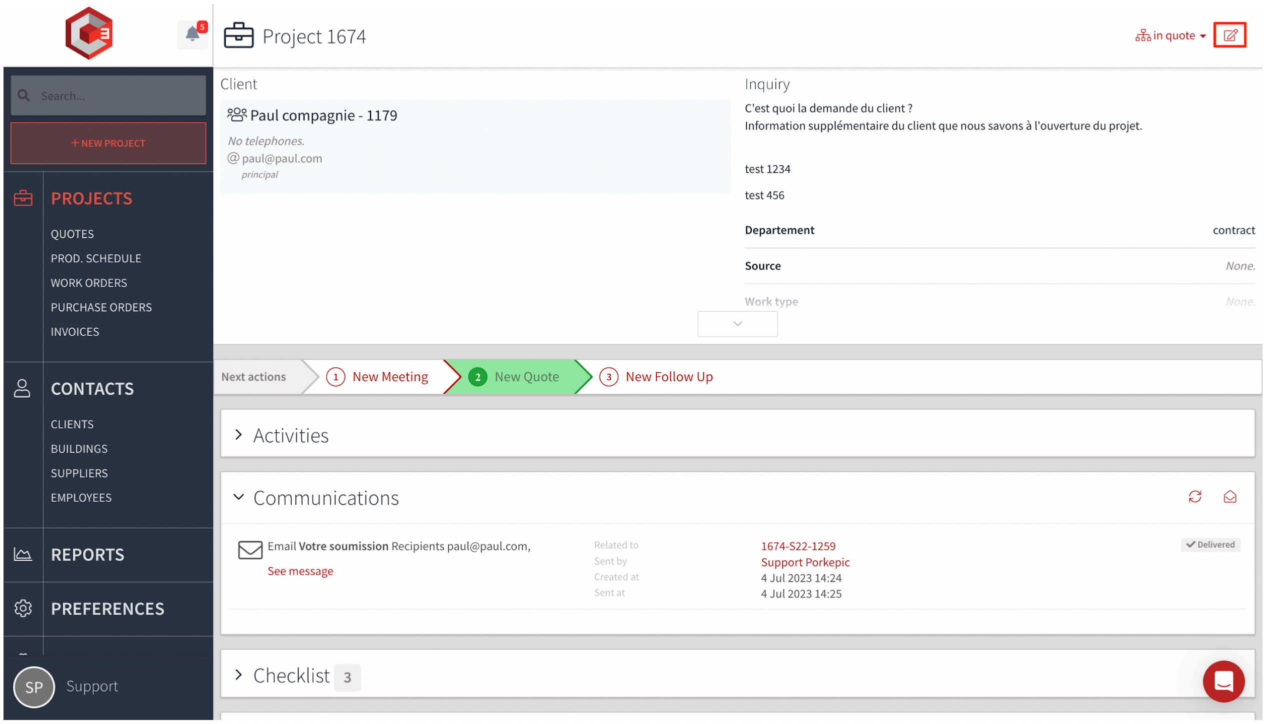
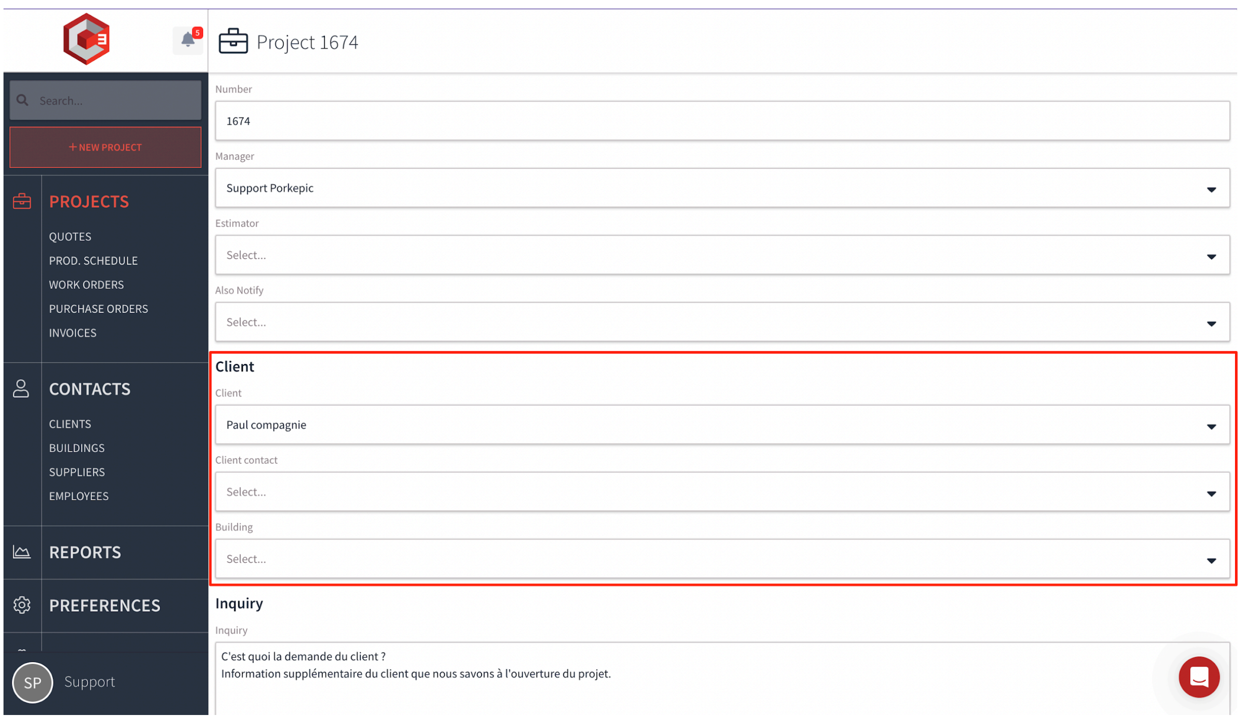


Whether you want to change the customer on the quotation or even on the invoice, you have to do it for the whole project.

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

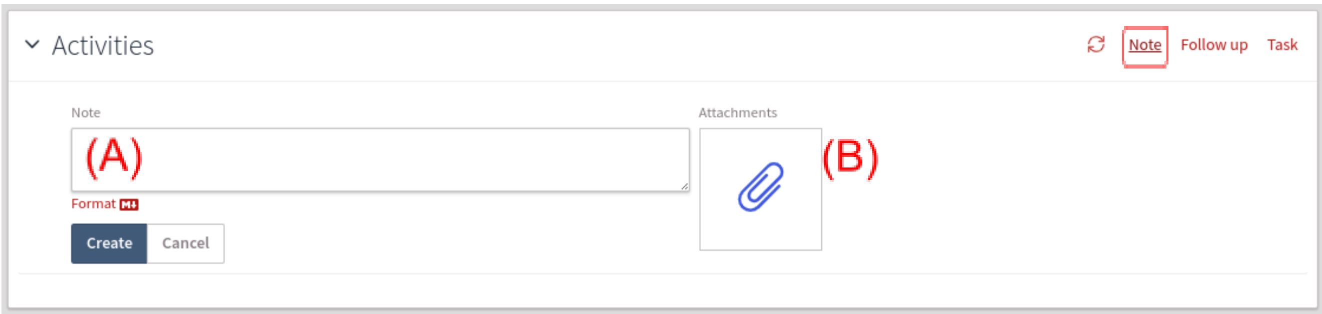


It is possible to modify all project information taken from the initial call.

7.5. Activities

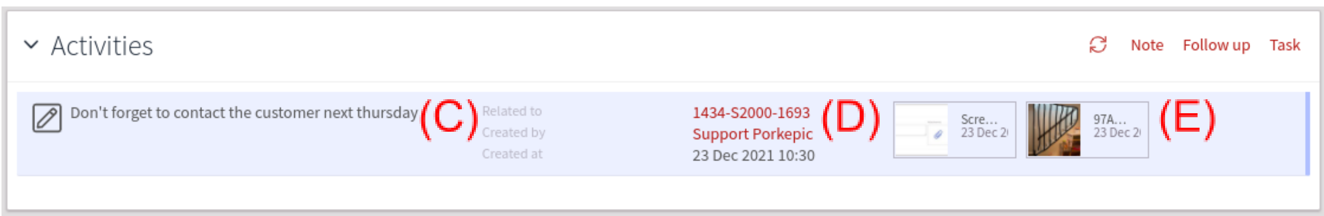
In this section, it’s possible to leave information related to the project.

7.5.1. Note



(A) Enter the note in this box.

(B) Attach a file if needed.



(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.

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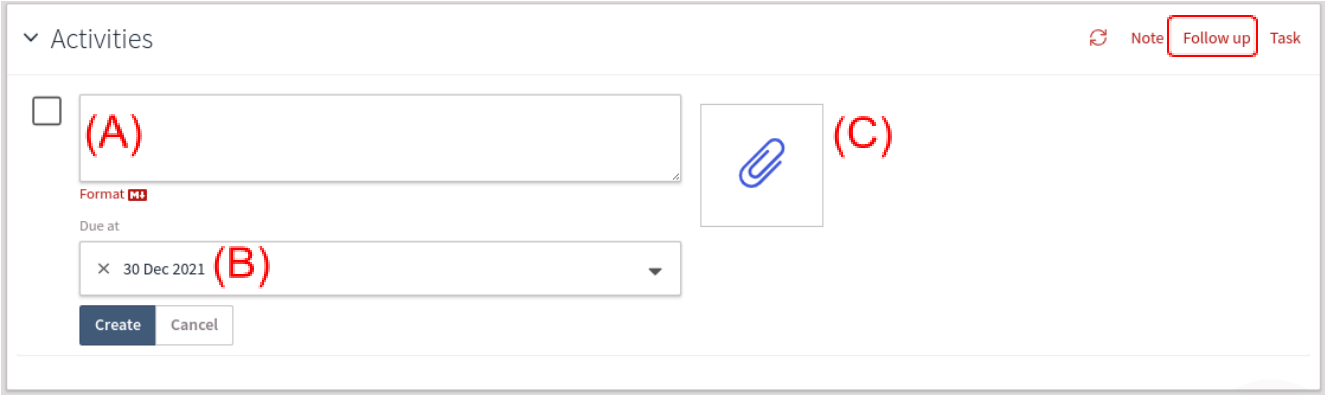
7.5.2. Follow-up



(A) Add a description.

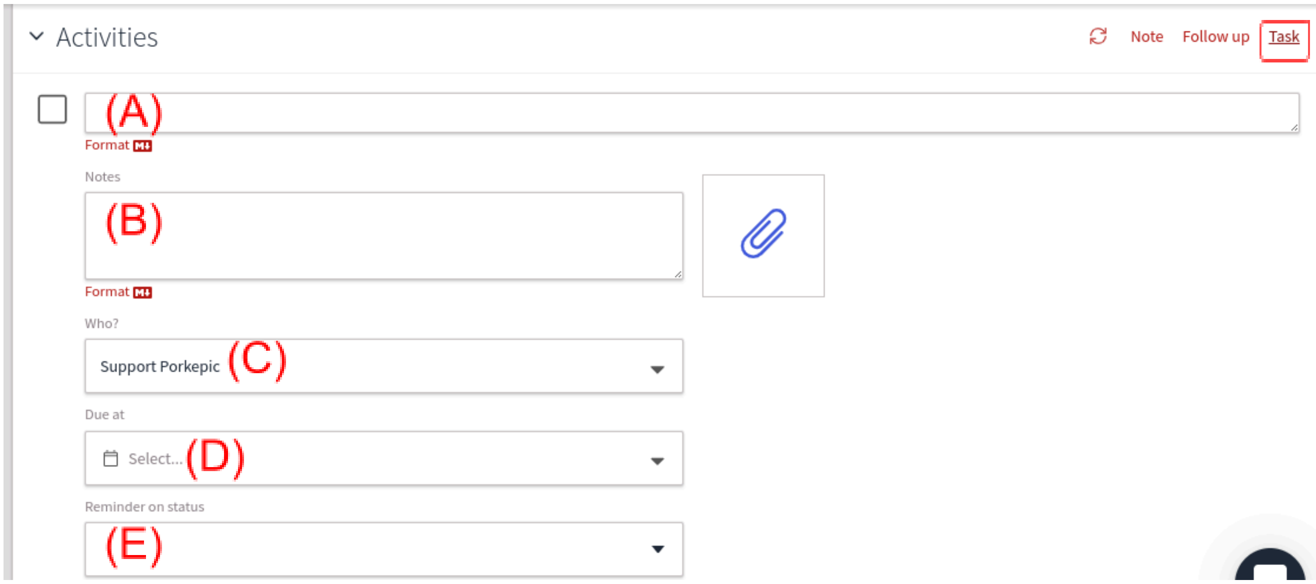
(B) Specify a date to receive a follow-up reminder.

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

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

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

7.5.3. Task



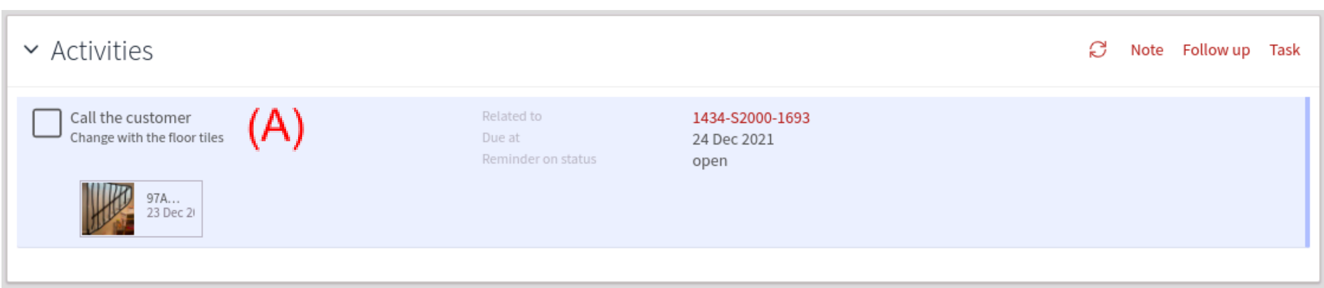
(A) Define a title for the task.

(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.

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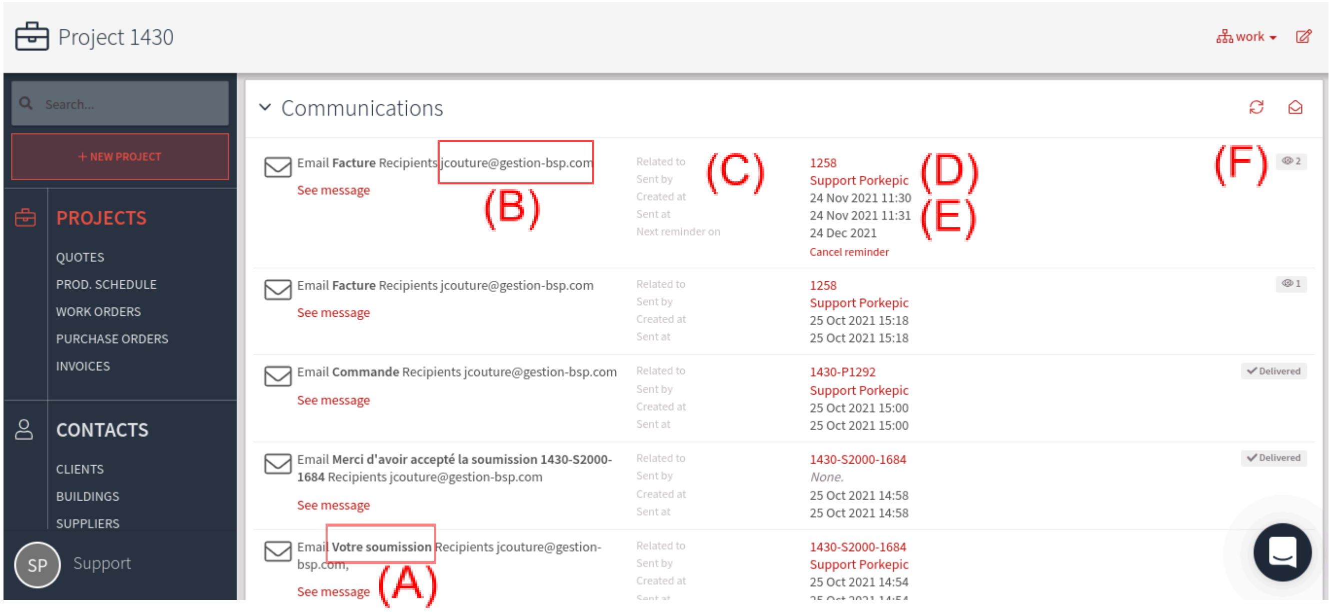


(A) What type of email was sent.

(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.

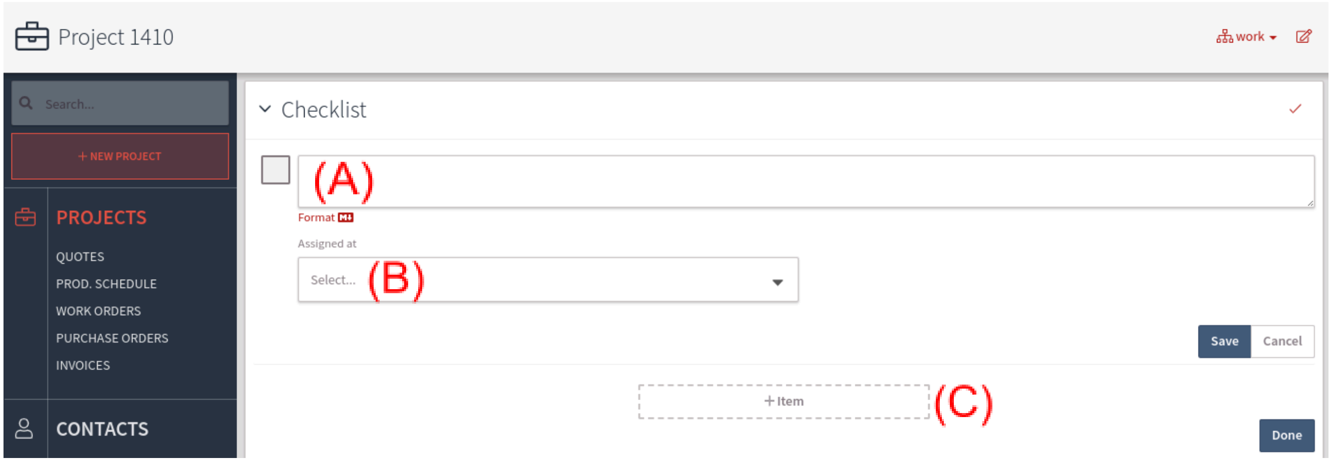
(E) If a reminder is scheduled and you want to remove it, press *Cancel Reminder*.

(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

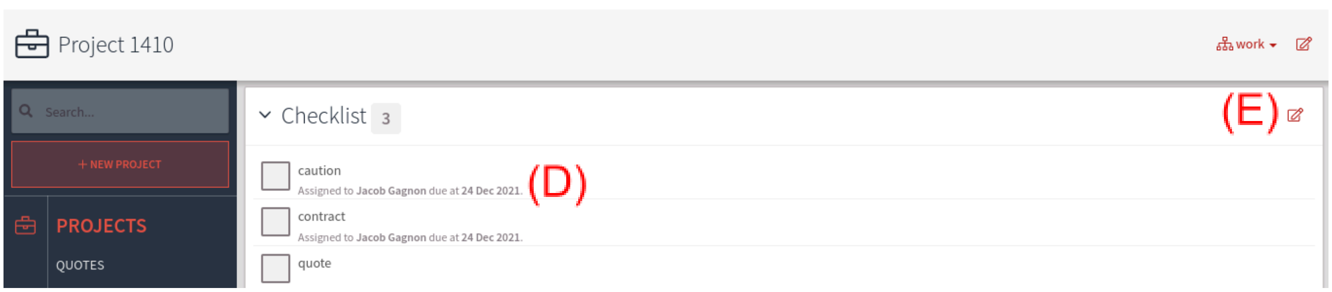
A checklist allows to follow the progress of the project. It's possible to have a default list on each project or according to the project status. It's possible to change the information of the list in the section *Checklists*. It's possible to assign the list to the project status in the *General preferences*.



(A) Determine the name of the checklist.

(B) Assign the activity to a colleague.

(C) Add/import items in the list.



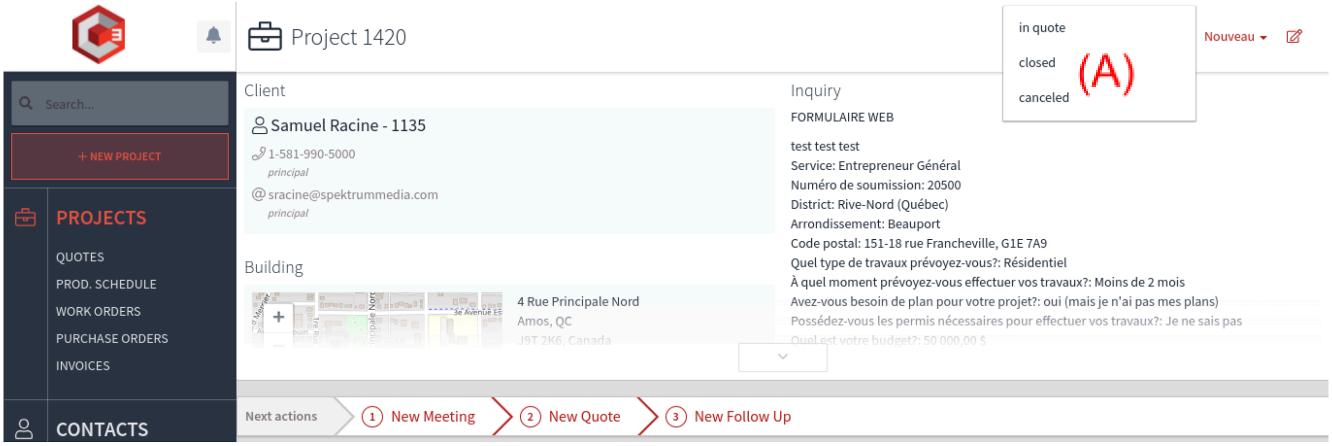
(D) Check the box when an activity in the list is completed.

(E) Modify the checklist.

7.8. New request stage

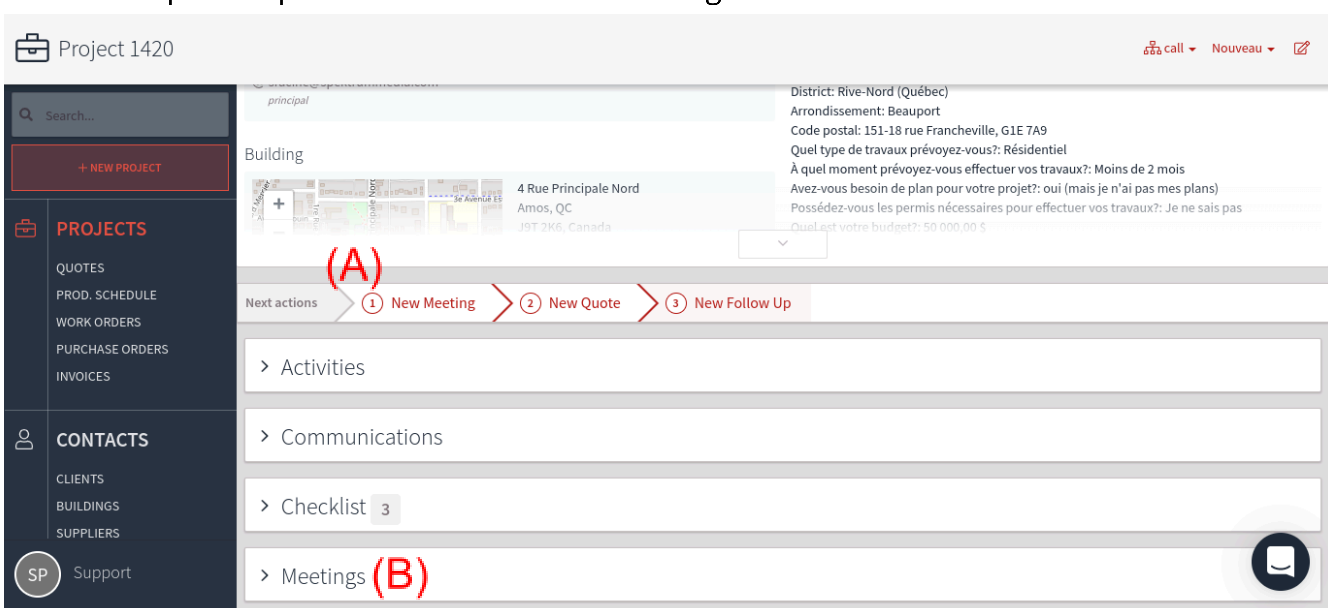
7.8.1. Communication status

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



7.8.2. New meeting

The next step in the process is to schedule a meeting with the client.



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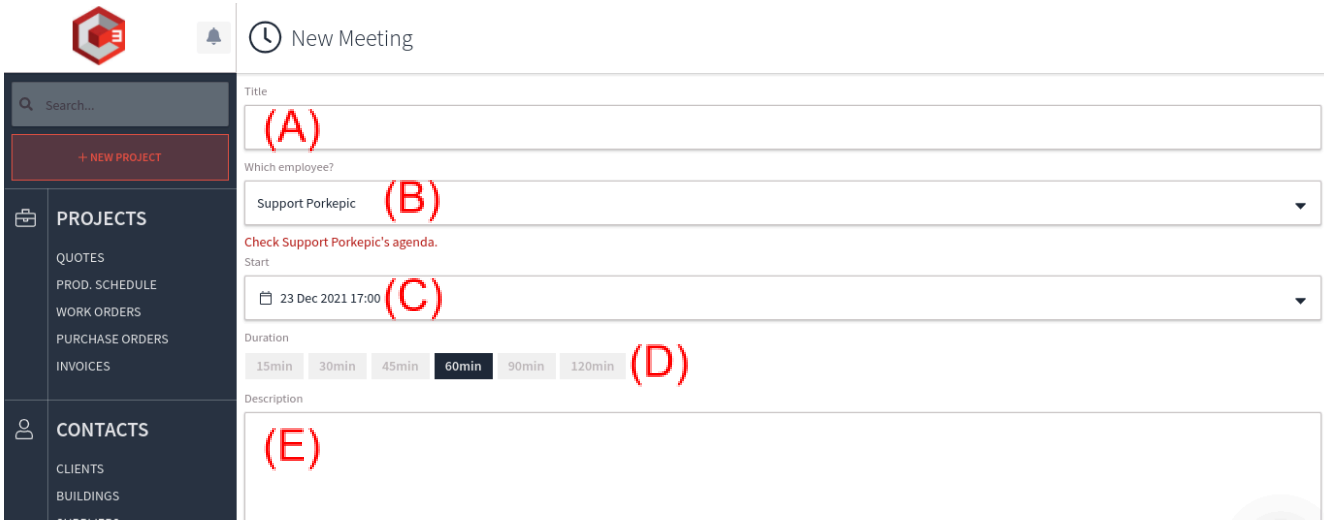
(A) Click on *New meeting* by following the order of the arrows in the next actions.

(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.

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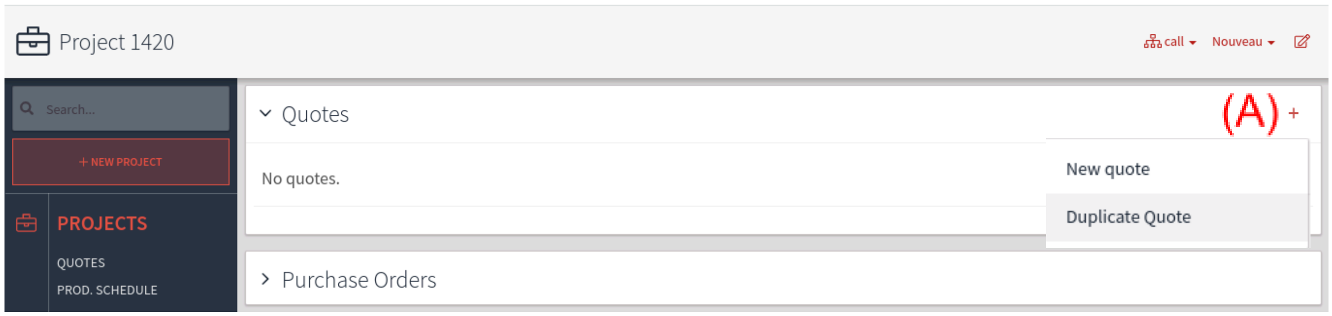
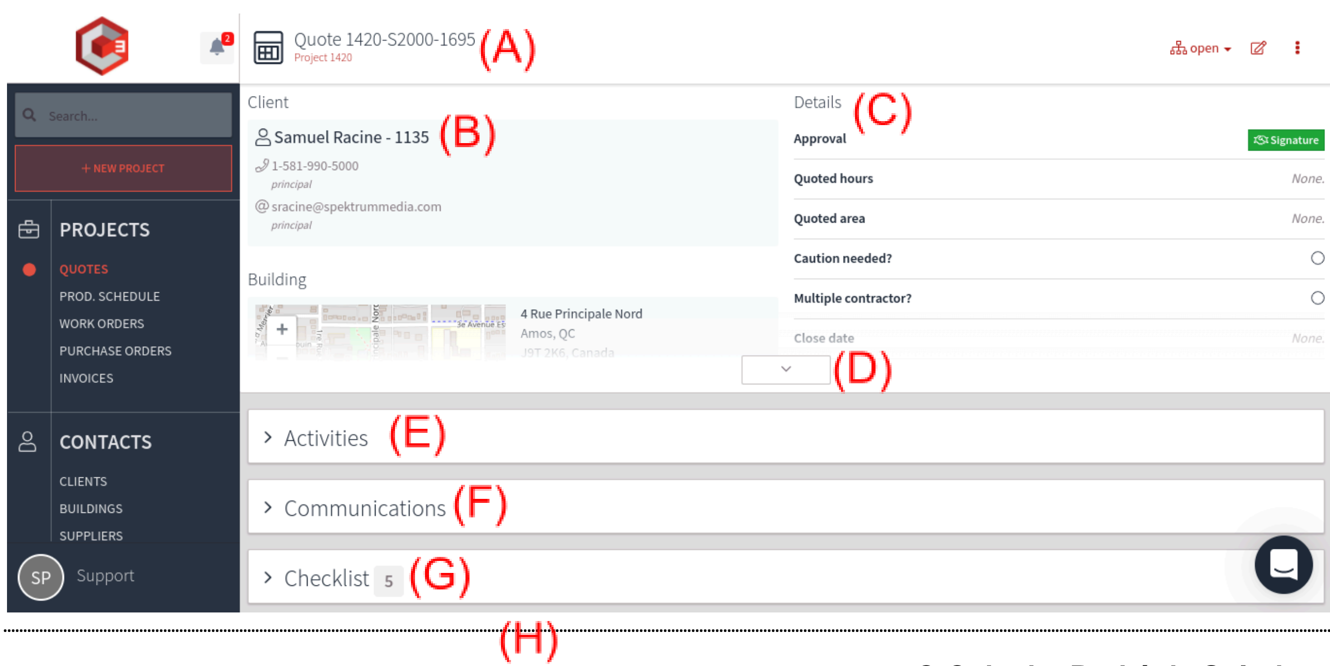
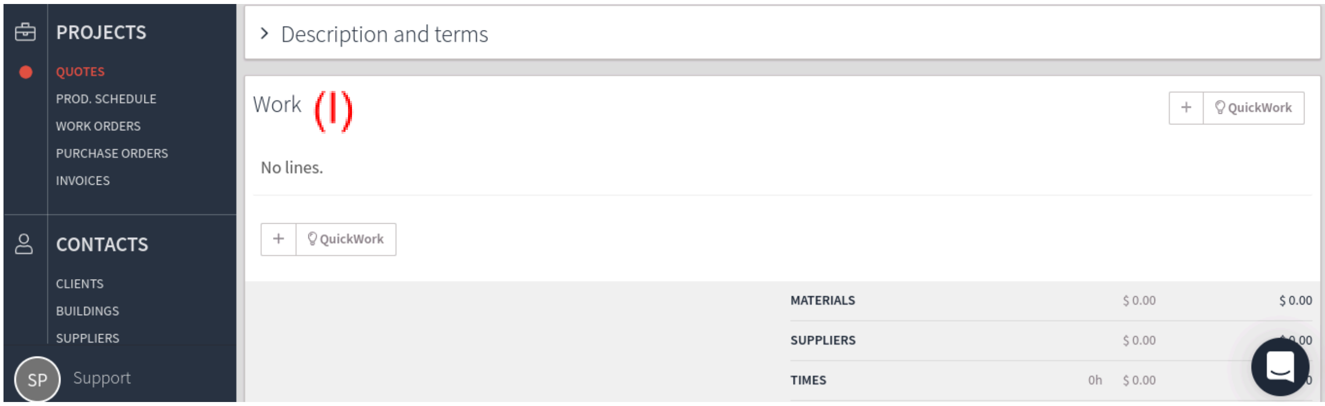


(A) Select whether you want to create a new quote or duplicate an existing quote.

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.

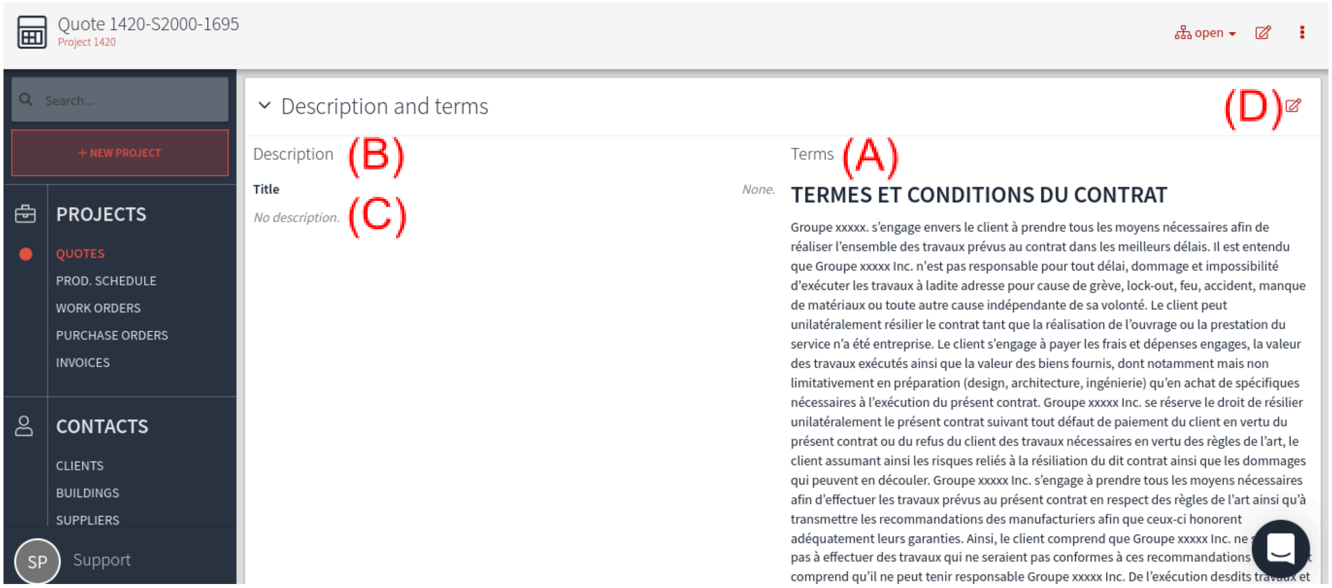
(G) The checklist.

(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.



(A) Specify the terms and conditions of the contract; it's possible to make them appear on all quotes in the quote preferences.

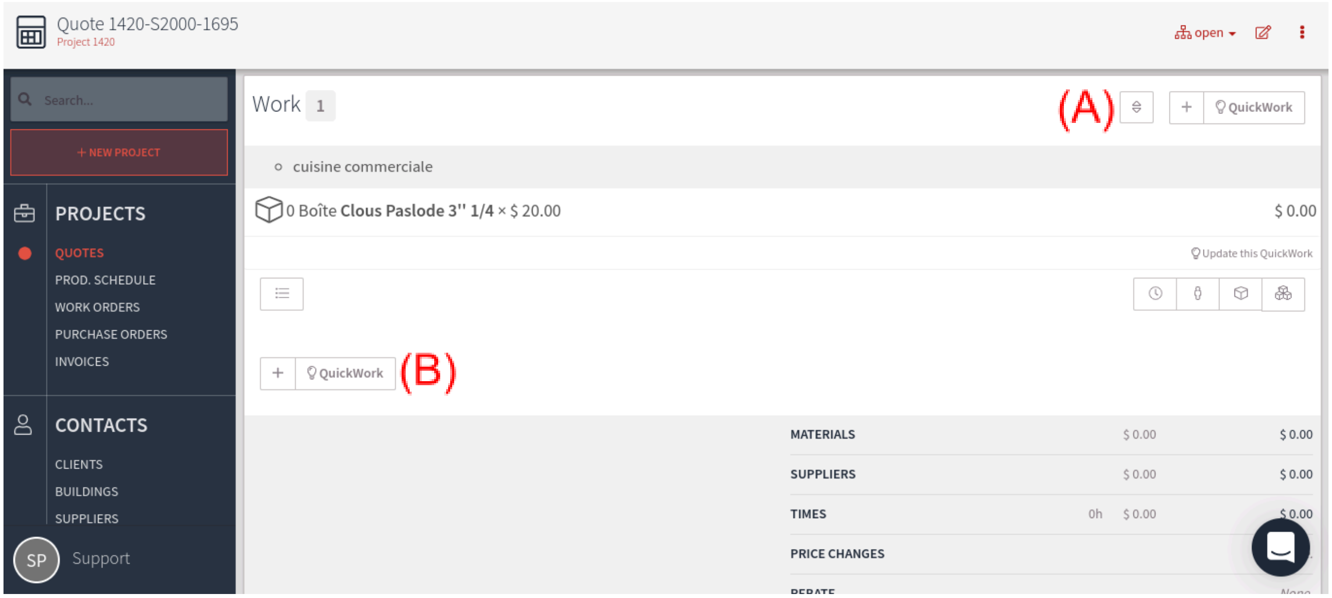
(B) Indicate the description of the quote or introduction.

(C) Enter the title.

(D) Modify the terms and conditions.

7.9.2.2. Works

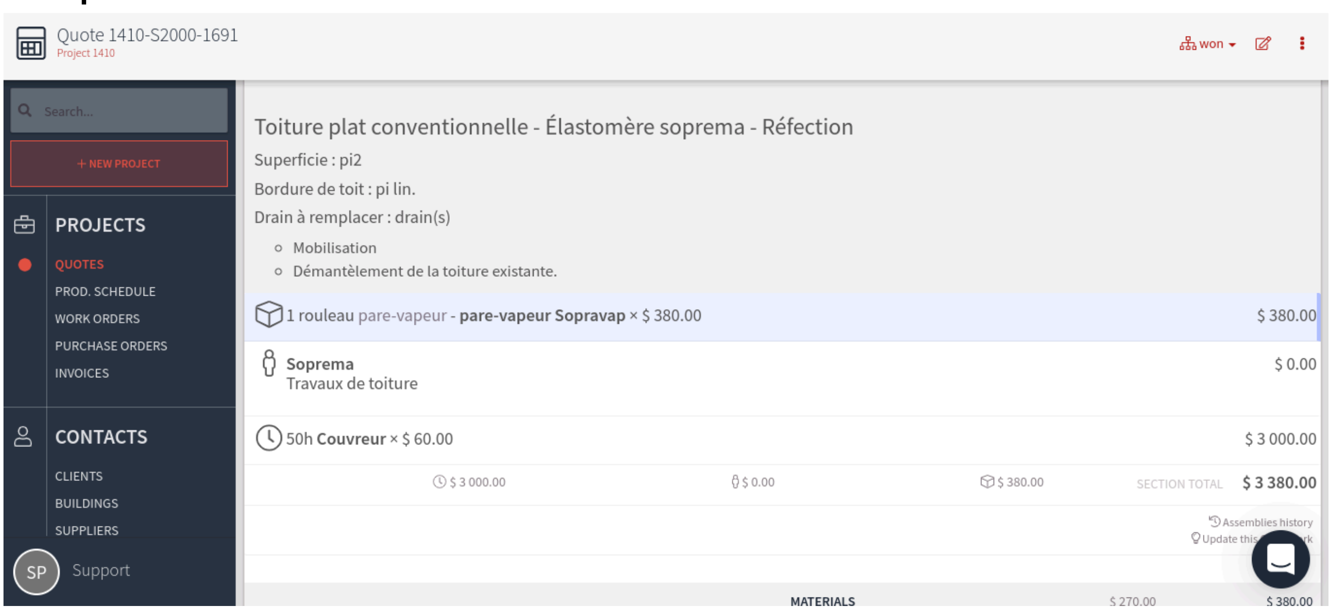
The *Work* section allows you to add the detailed description. You must have a description (new section or QuickWorks) to be able to add either, workforce, materials, suppliers or subcontractors or an assembly.



(A) Press + for a new section.

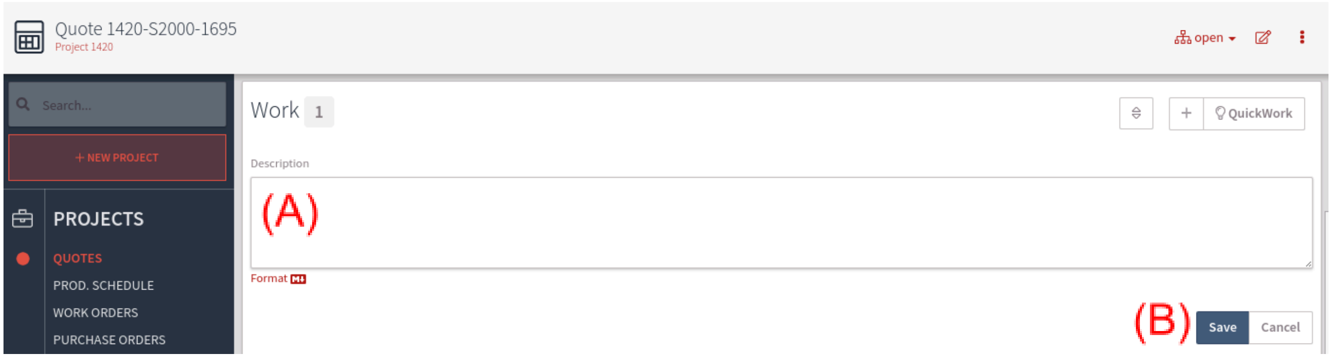
(B) Click on *QuickWorks* to select one.

Example - Flat roof



7.9.2.2.1. New section

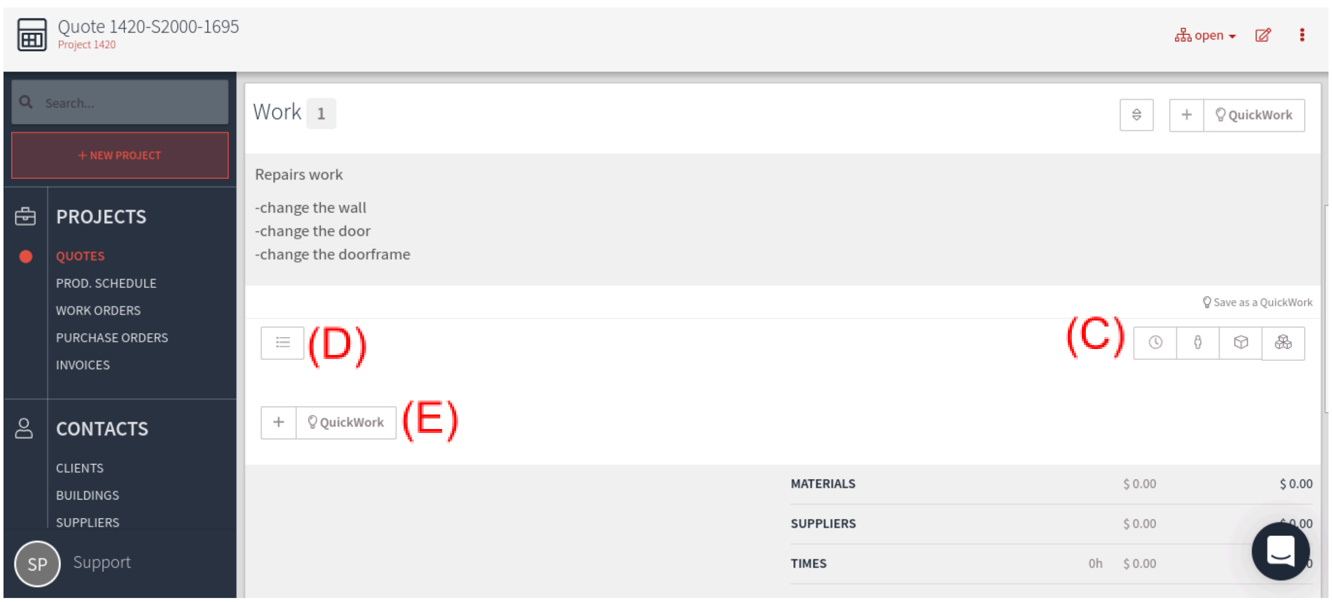
In each section, it's possible to enter the text of your choice. It's also possible to add several sections to form the quote. Each section is calculated separately.



(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).

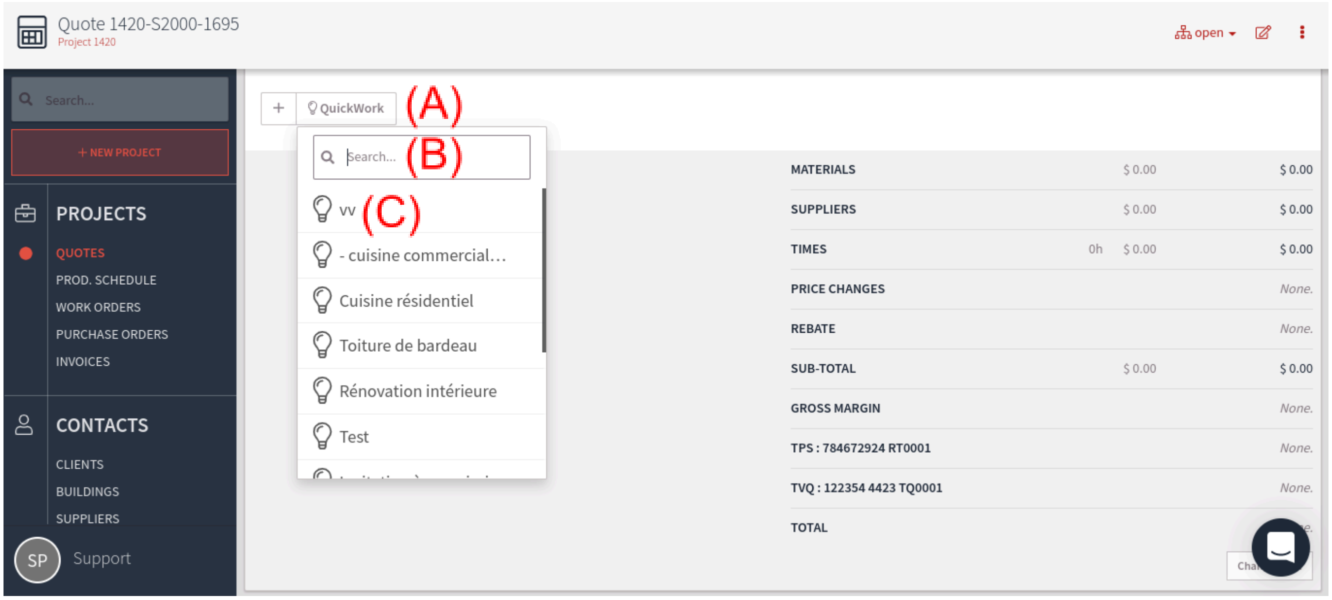
(D) Add a checklist that will appear on the work order if desired.

(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.

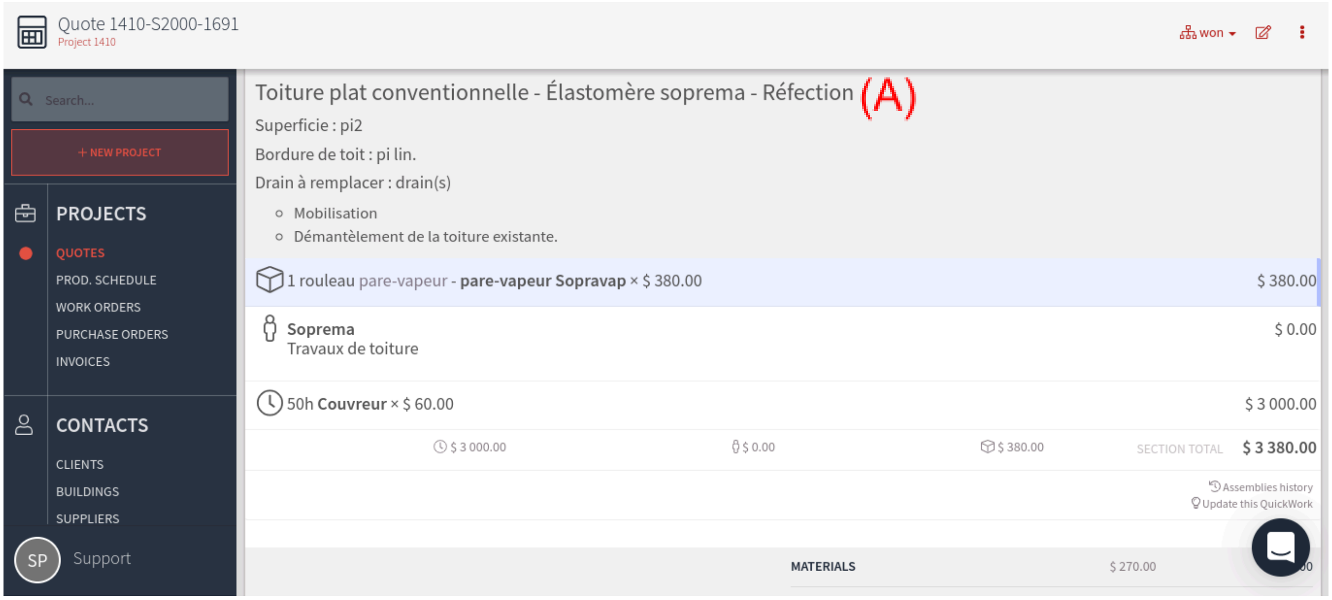


(A) Click on *QuickWorks* to display a list of the last 10.

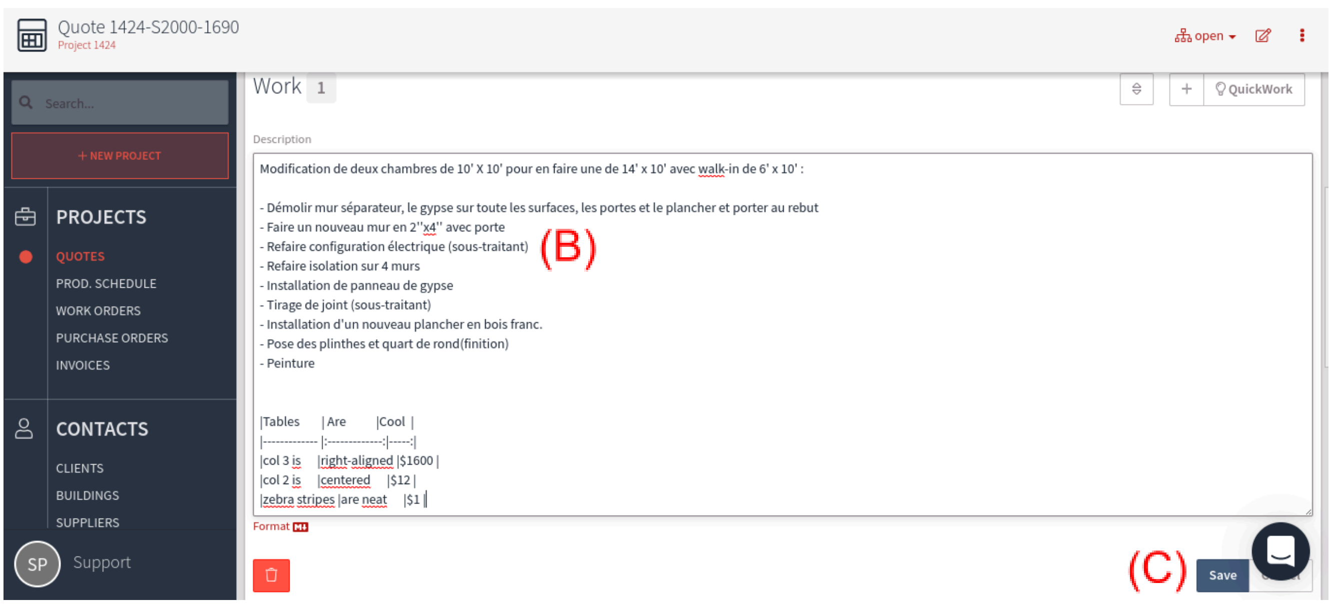
(B) Do a keyword search.

(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.



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

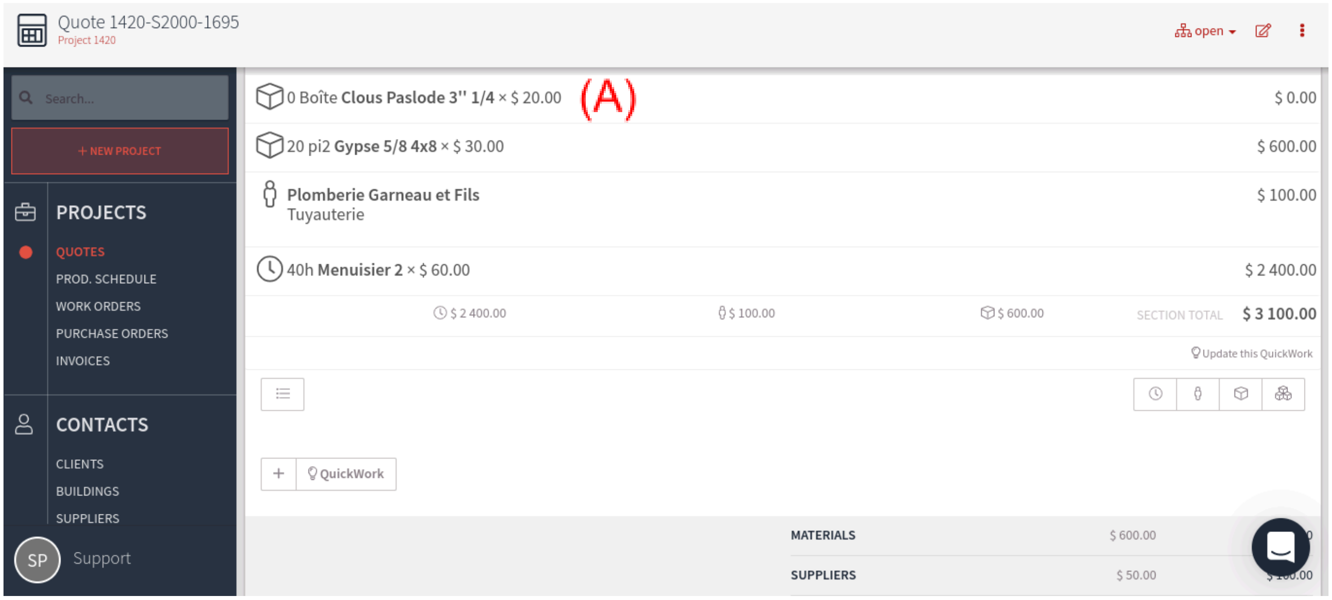


(B) Edit the text as desired when the formatting box appears.

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

7.9.2.2.3. Estimate

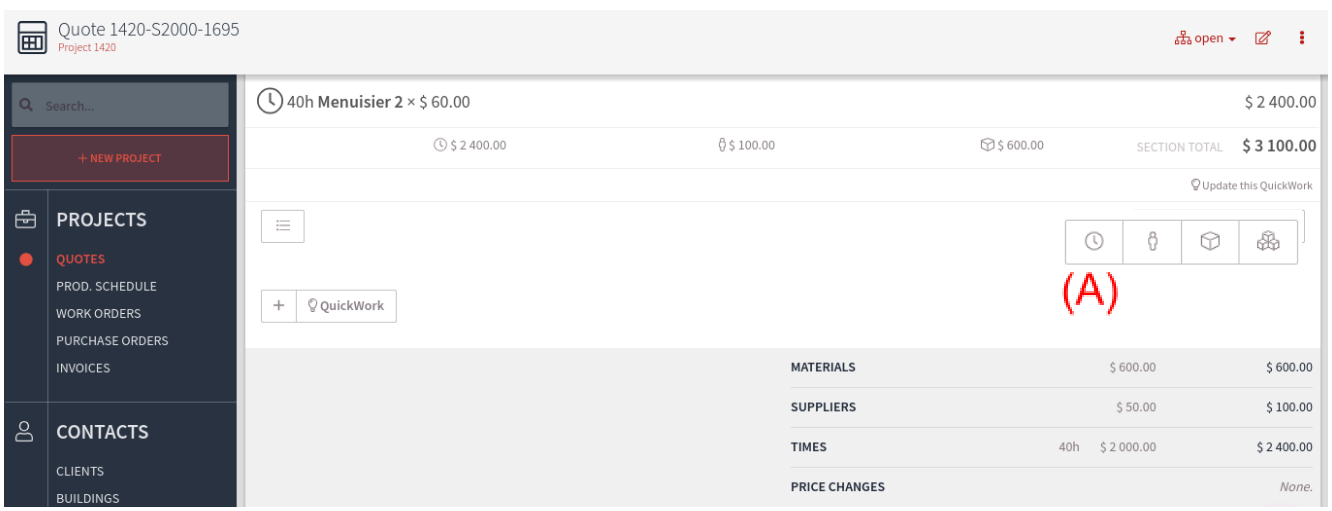
To add costs to the quote, it's possible to do so manually by adding [materials](), [workforce]() and [suppliers or subcontractors](). It's also possible to make [assemblies]().



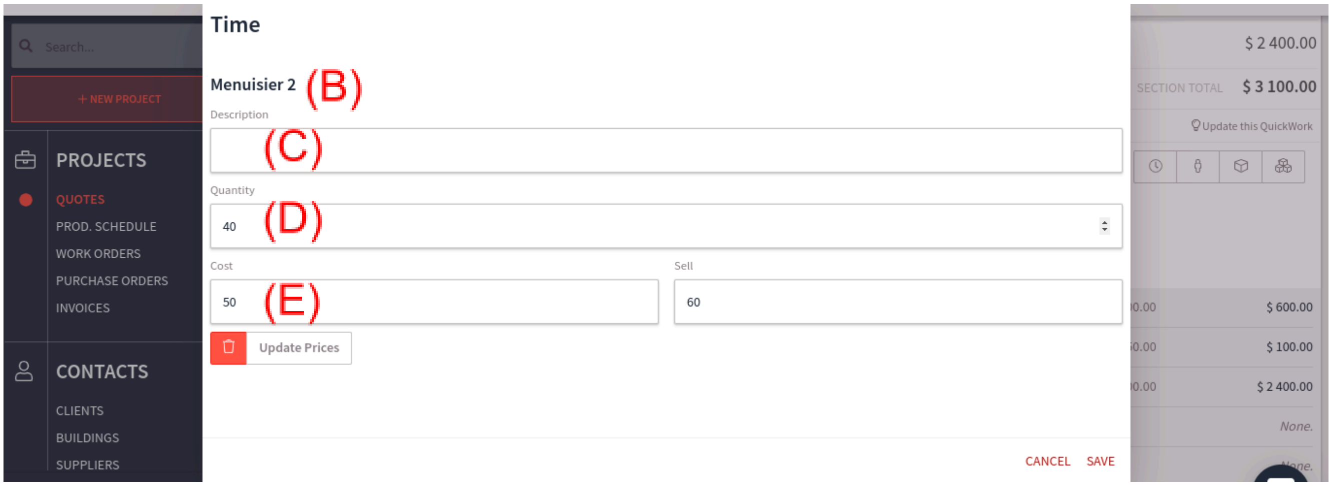
(A) Press the material line to change the quantity.

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.



(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.

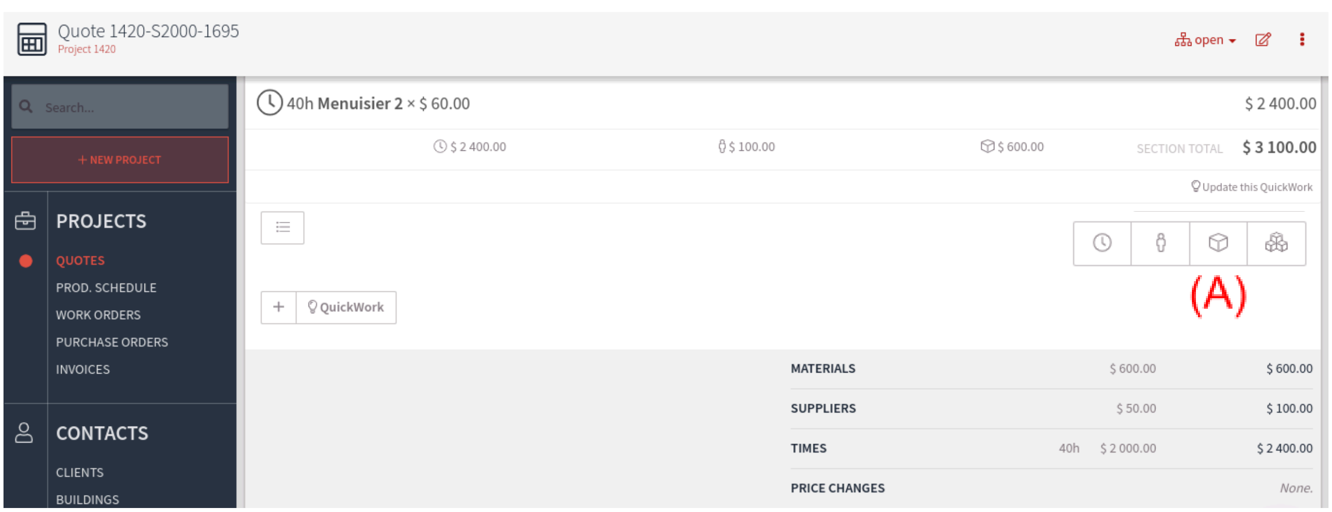
(C) Include a description to differentiate multiple sections.

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

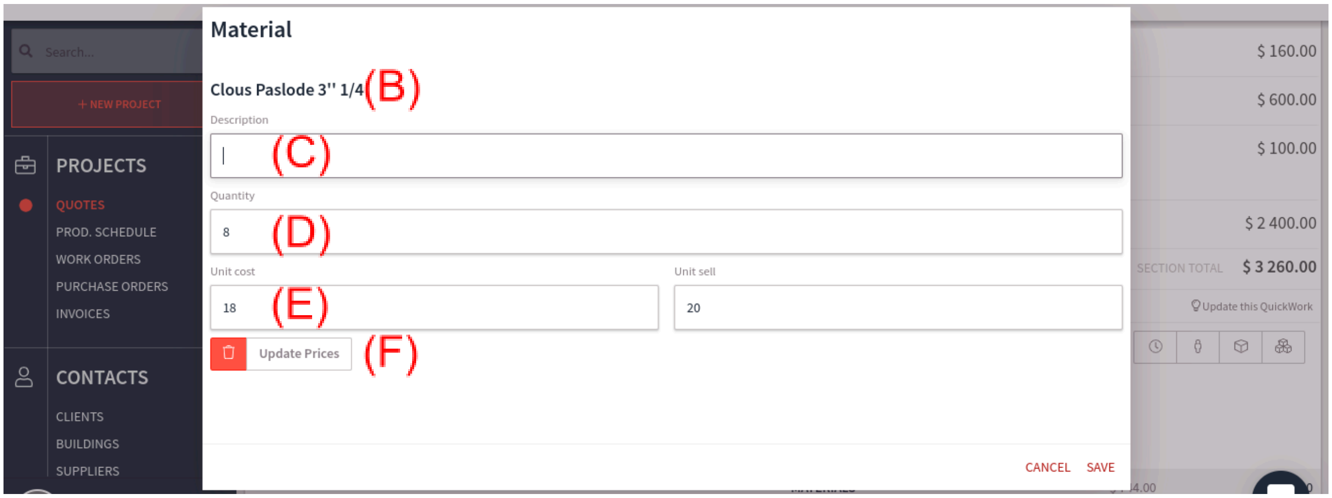
(E) Change the cost and selling price, if you have the access.

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.

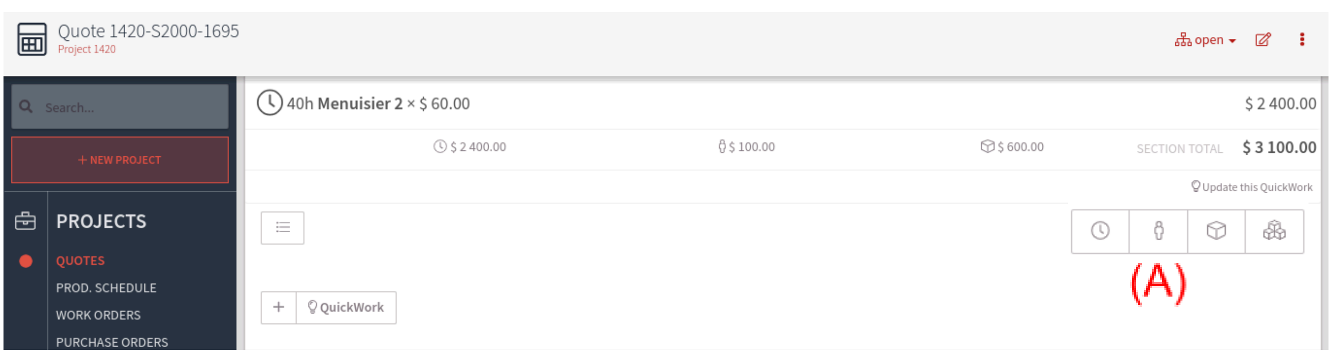
(D) Determine the quantity needed.

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

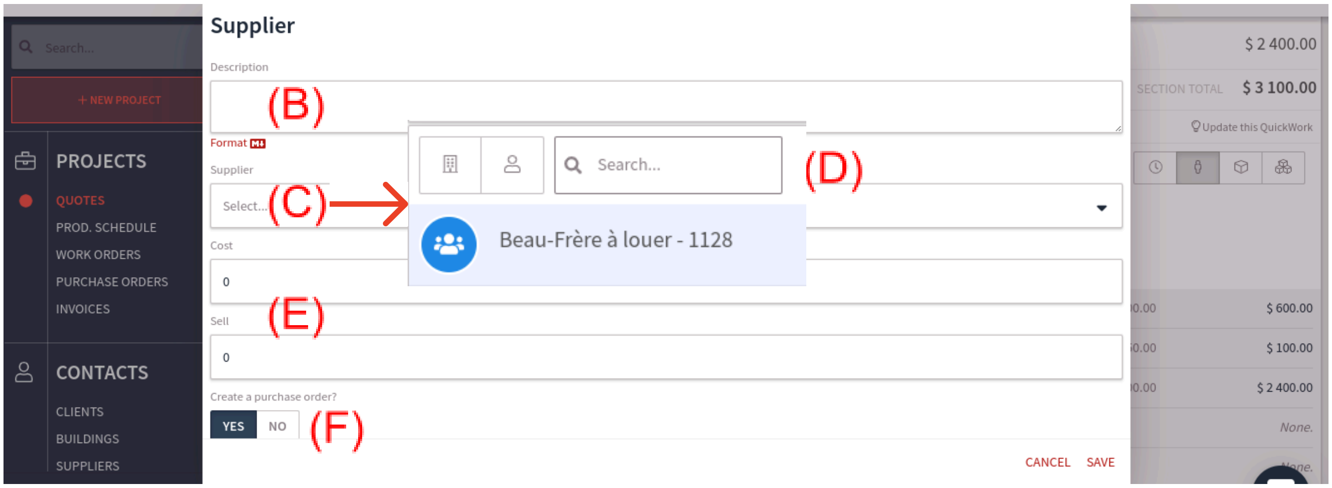
(F) Change the price if necessary. If the quote is dated and you know that the price has been changed in the master list. It's possible to click here and the price will be modified on this section of the quote. Note that the price will be modified only for this quote.

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.



(B) Enter a description or detail regarding the addition of this supplier.

(C) Select from suppliers or subcontractors.

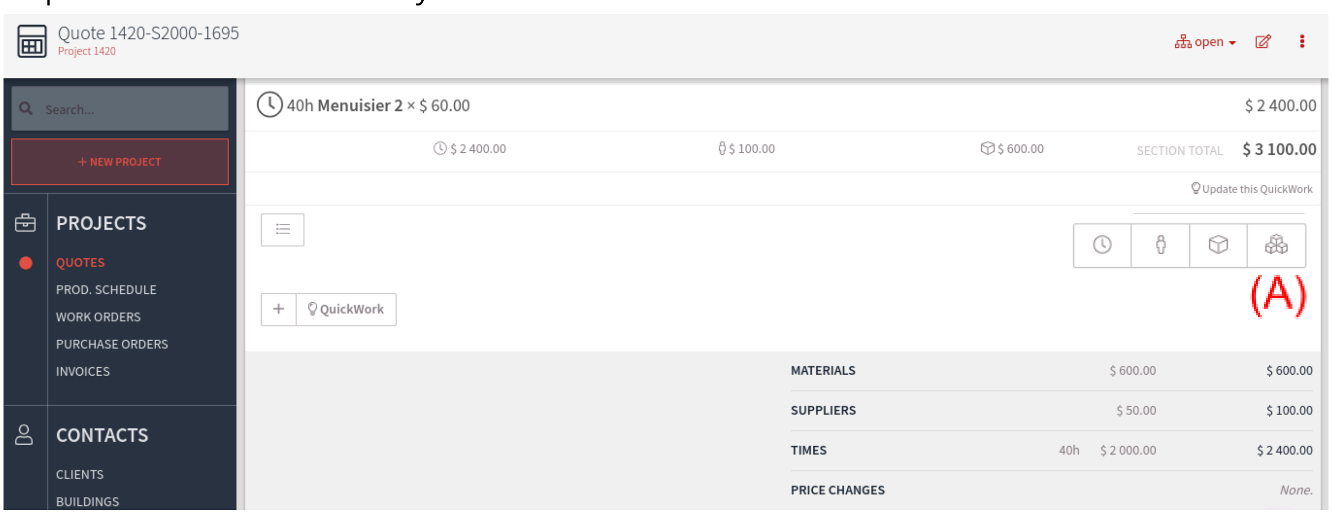
(D) Create a new supplier or subcontractor directly in the interface, if you have access.

(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*.

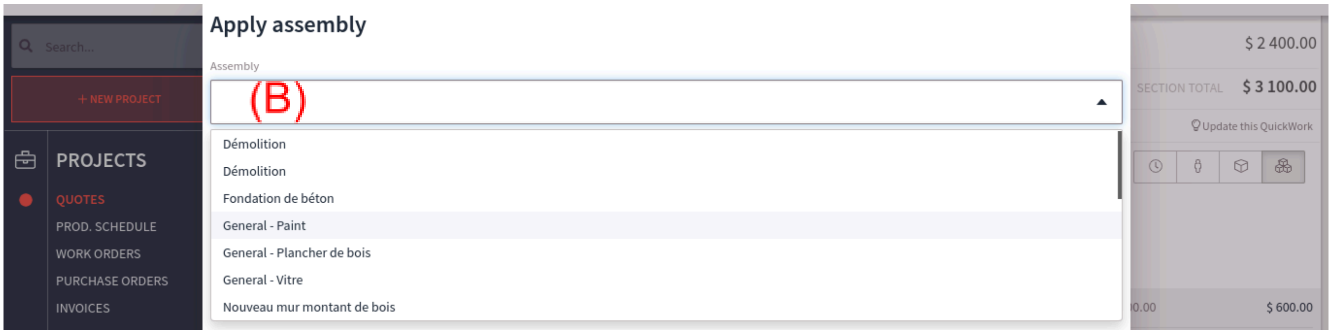
7.9.2.2.4. Assemblies

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



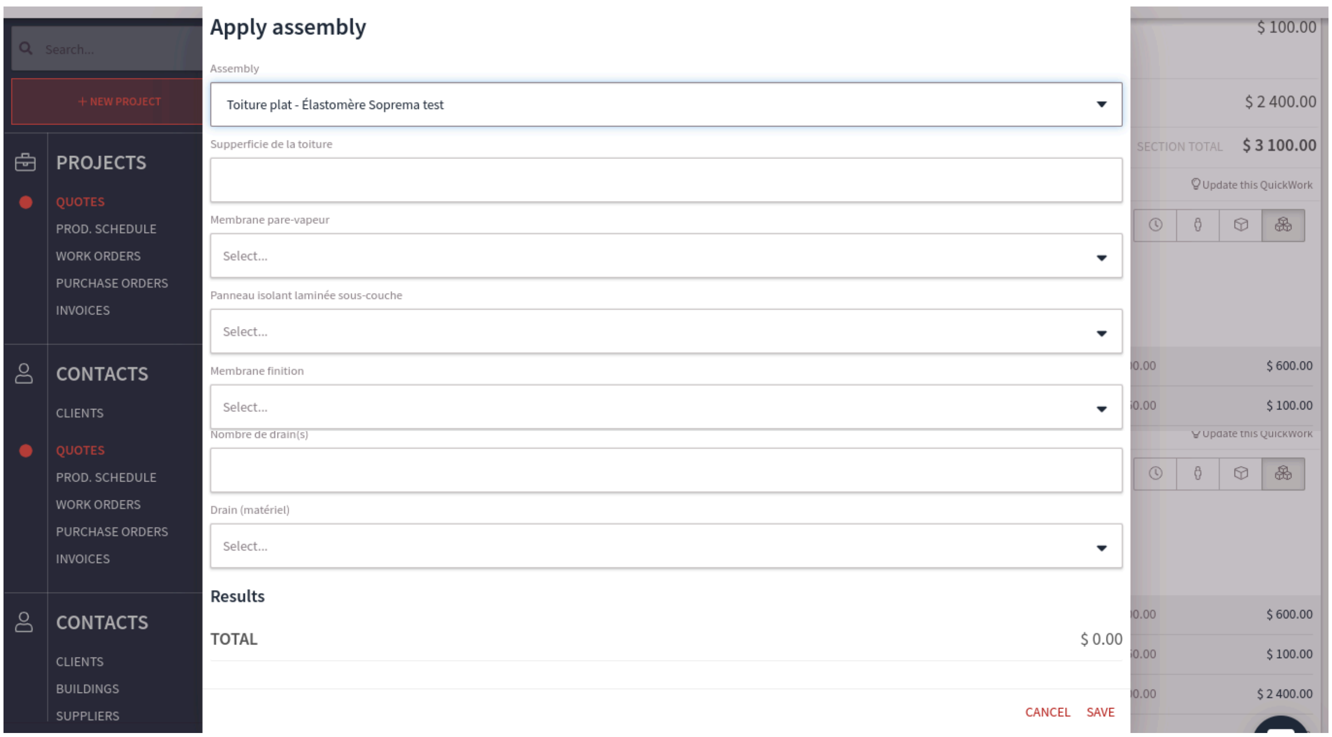
(A) Press the three small cubes to choose which assembly to use from the list.

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.



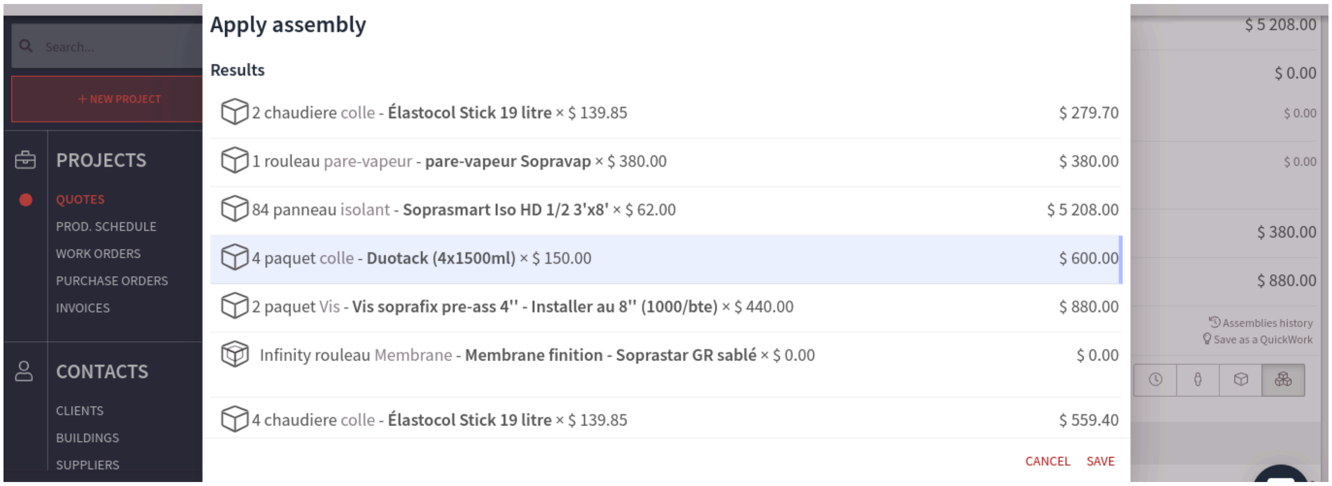
(B) Click on the one to be applied, for example, the Flat Roof - Elastomer assembly.

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



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

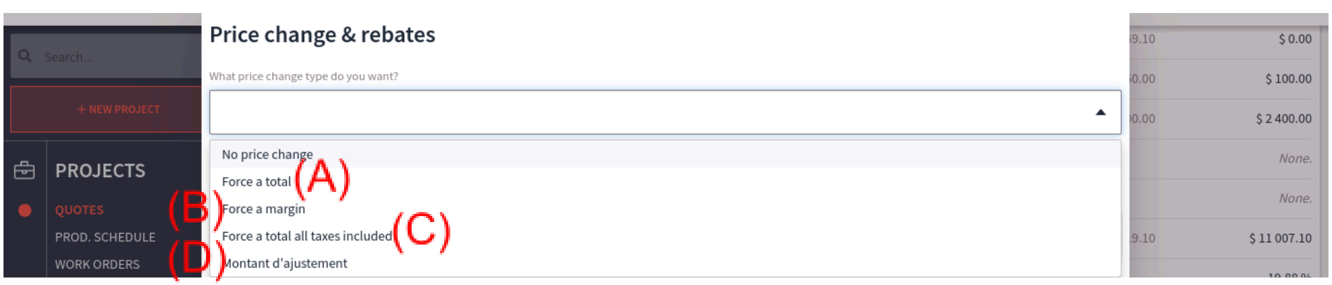


It's possible to apply multiple assemblies to a QuickWorks or in the *Works* area.

7.9.2.3. Price adjustment

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

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



(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.

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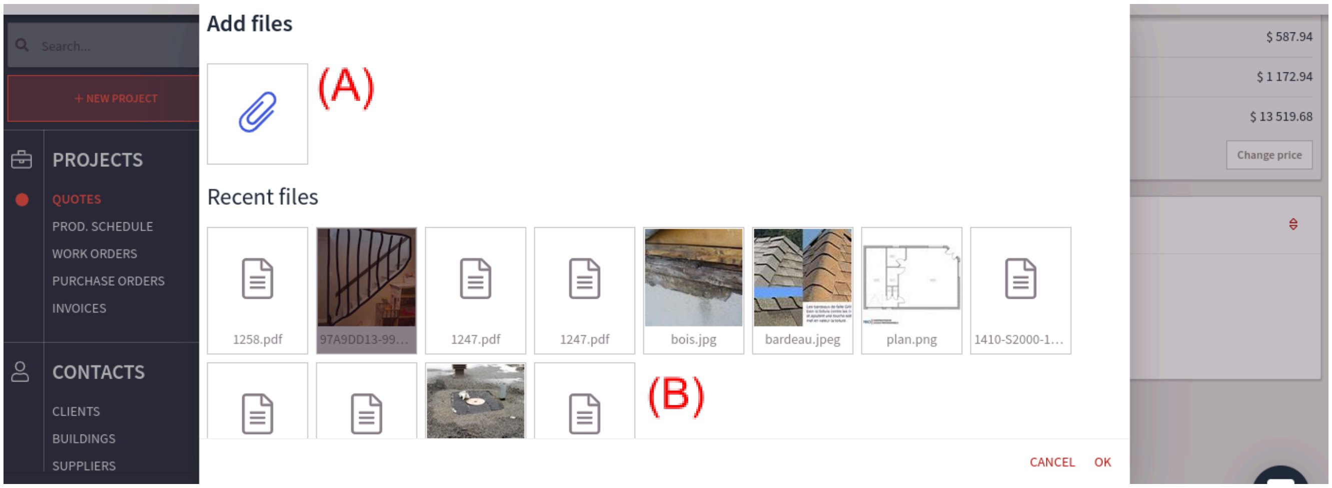
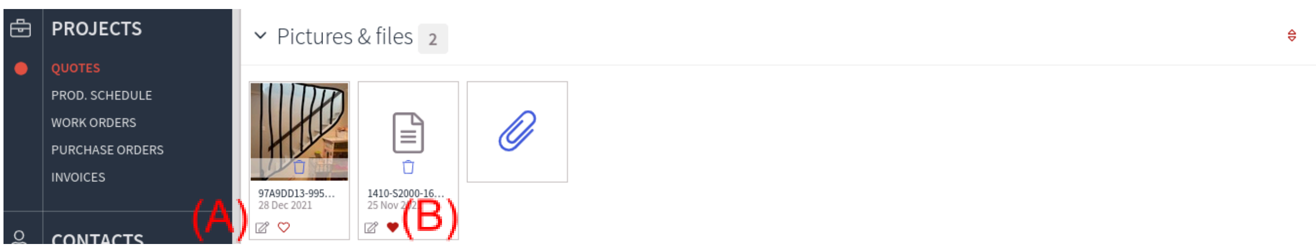


(A) To select photos or files from your computer.

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

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

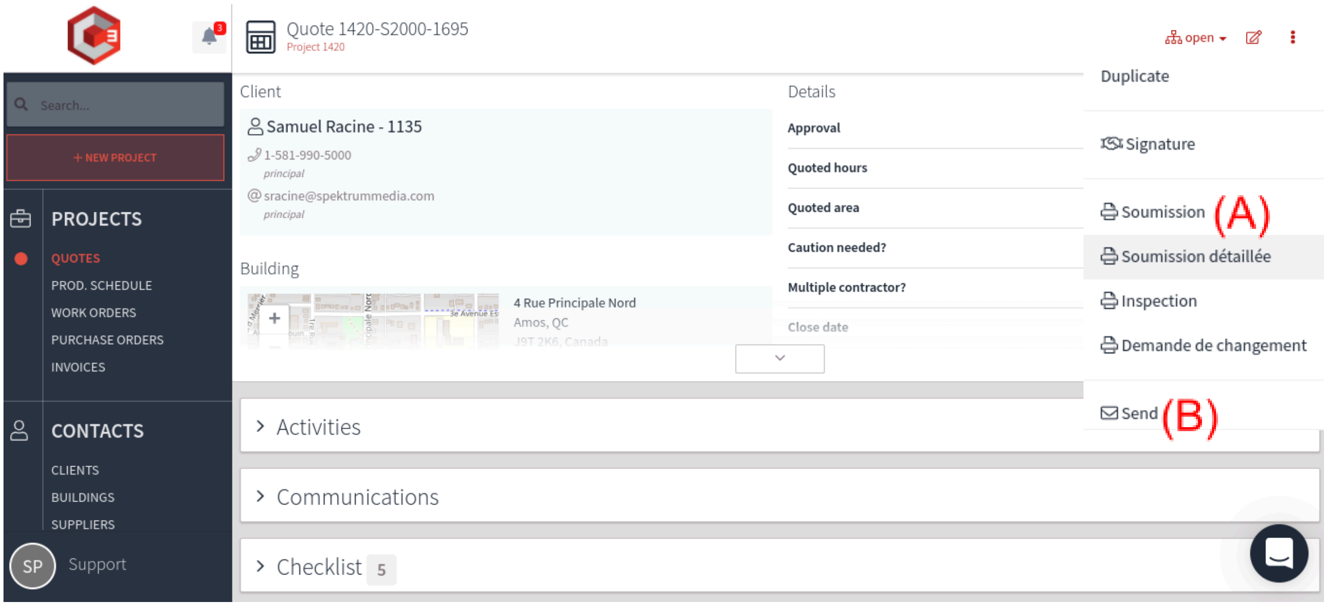


(A) Set a description to the image by clicking on the small pencil under the photo.

(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.

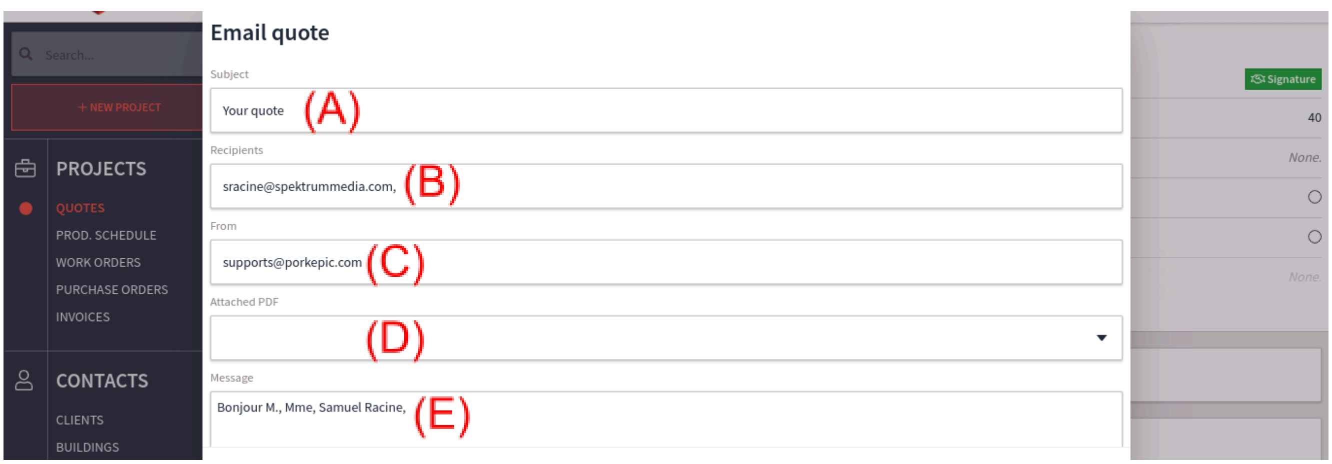


(A) Print the basic quote, the detailed quote, an inspection or a change request.

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.



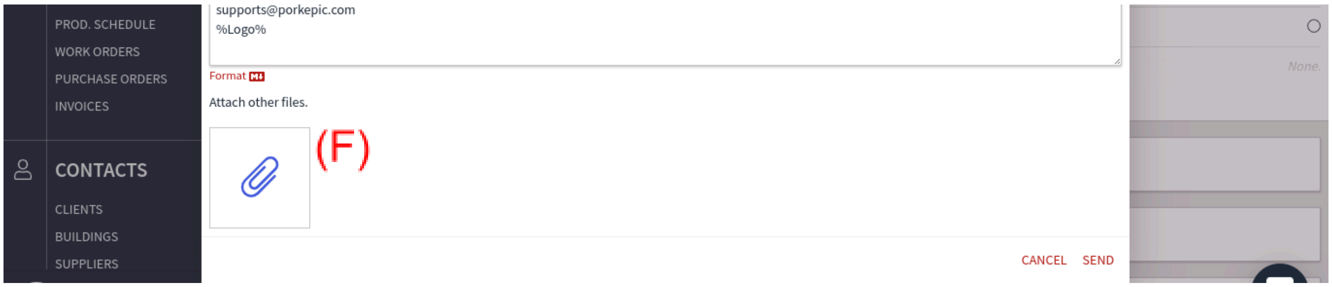
(A) The subject of the email.

(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.*

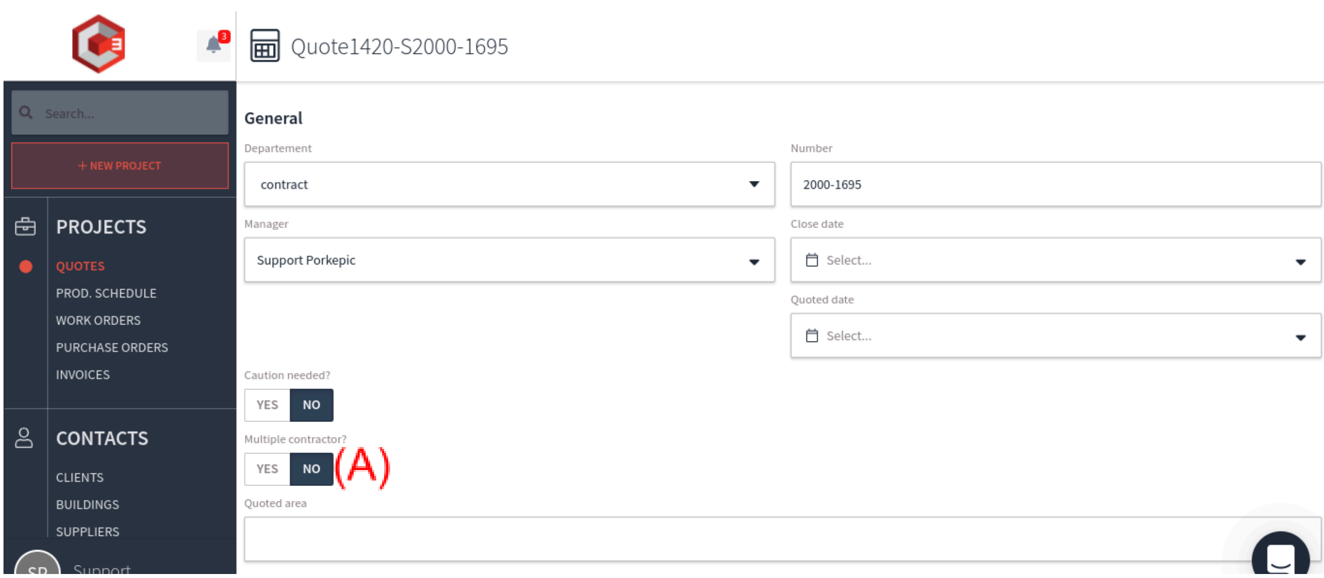


(F) It's also possible to attach other files to the quote such as certificates or attestations.

This step will mark the quote as sent.

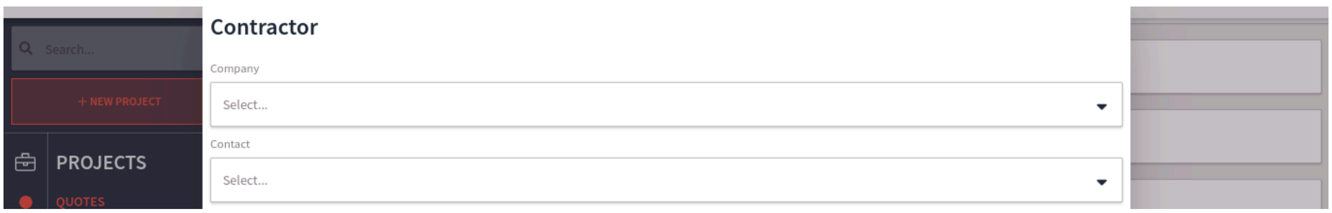
7.9.5. Sending multiple contractors

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.

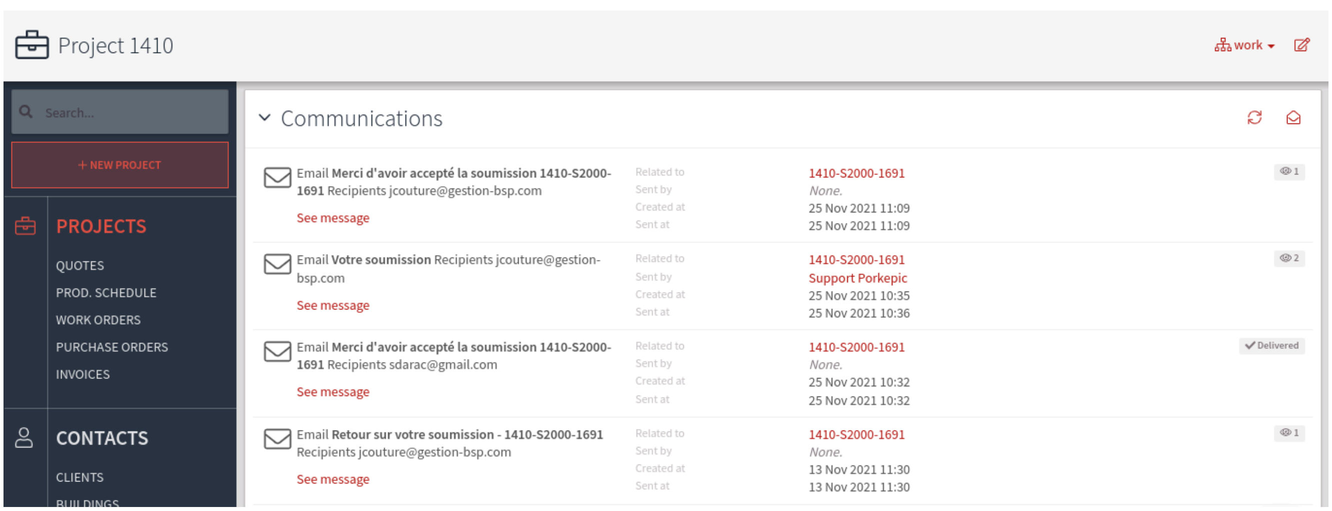
(B) Add another company (customer) and a contact.



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.

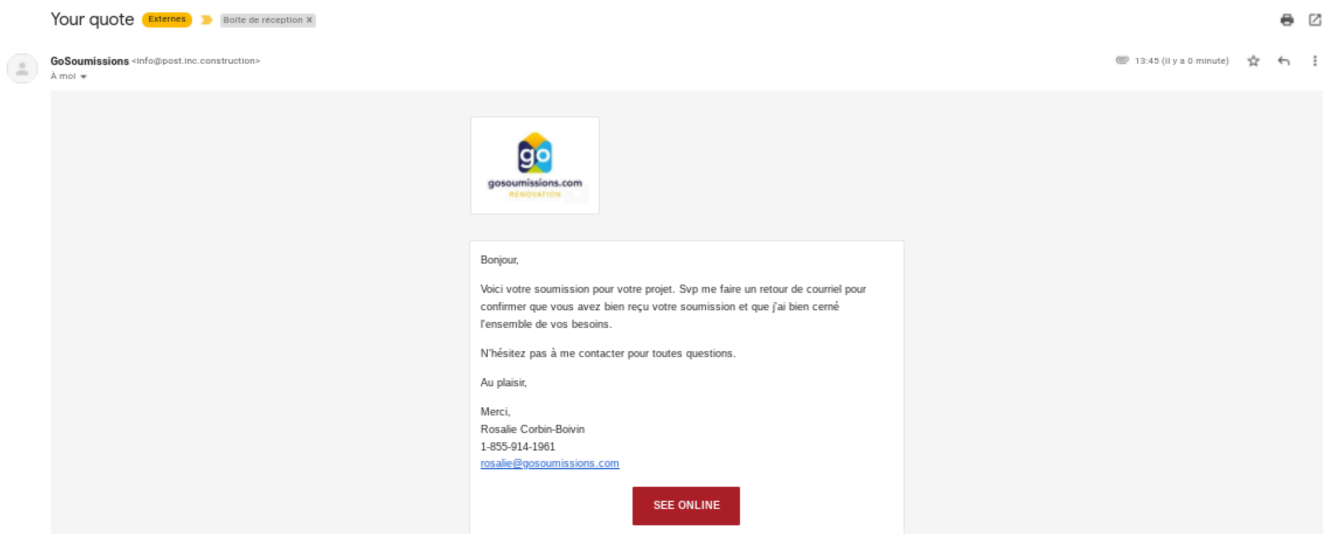


7.9.7. Electronic signature

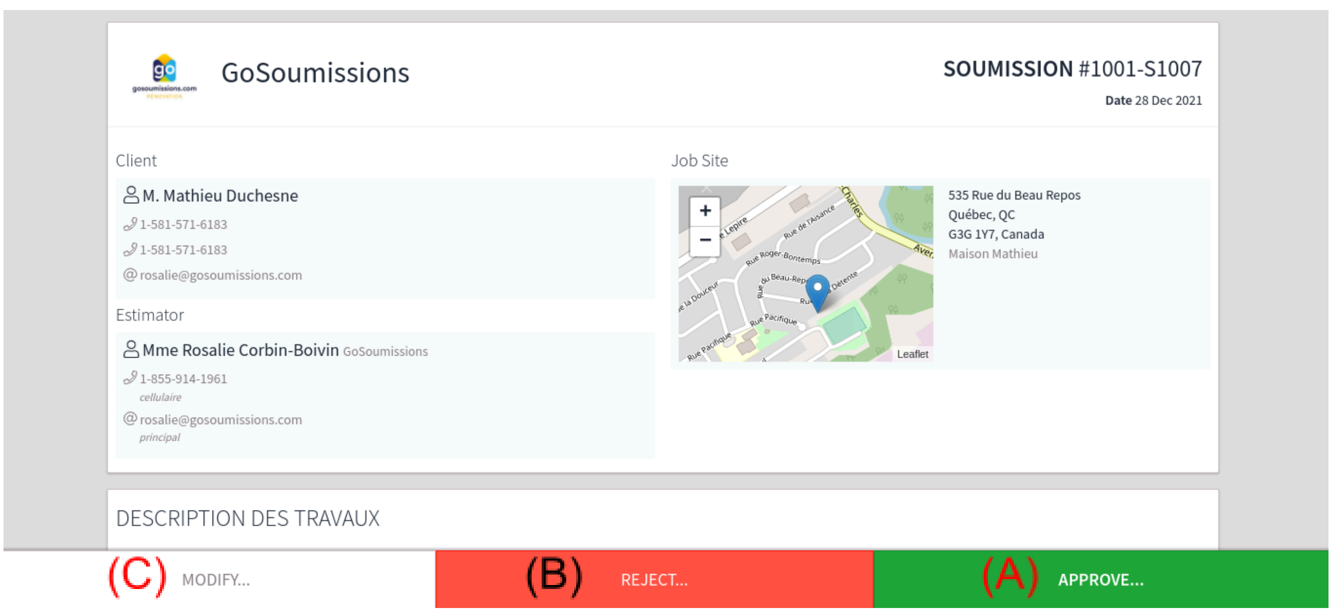
It's important to mark the quote as *Won*. This can be done via the email sent to the client or in the *Approval* section on the top right.

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.

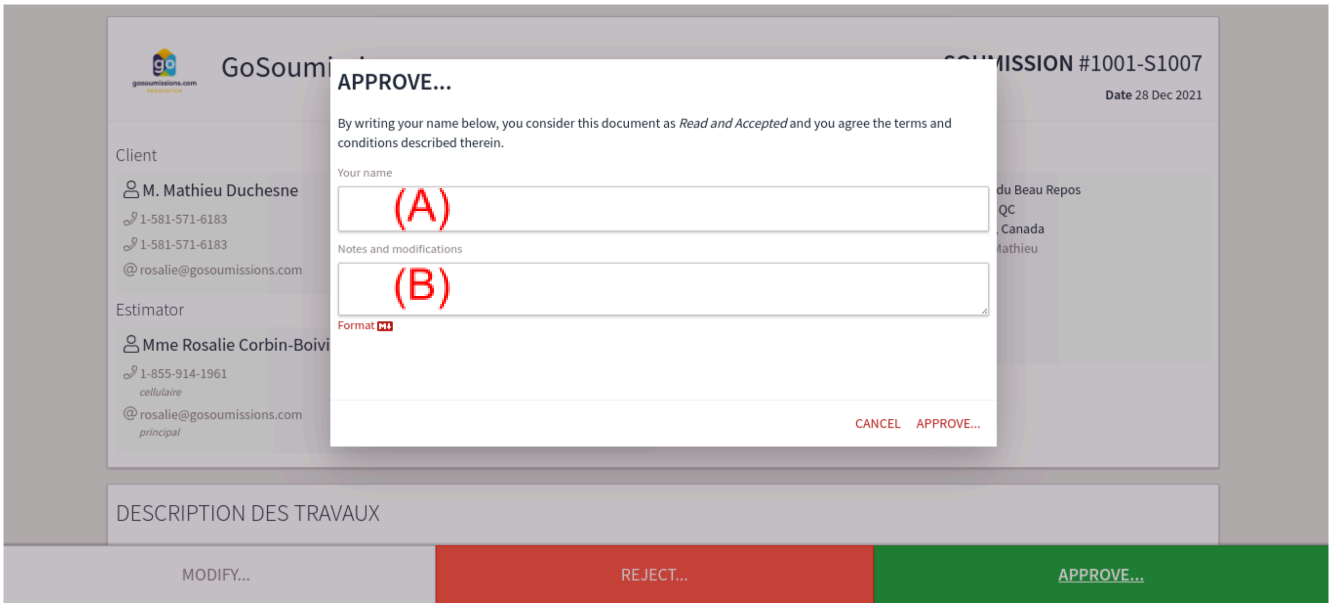


(A) Approve.

(B) Reject.

(C) Request a modification for the quote.

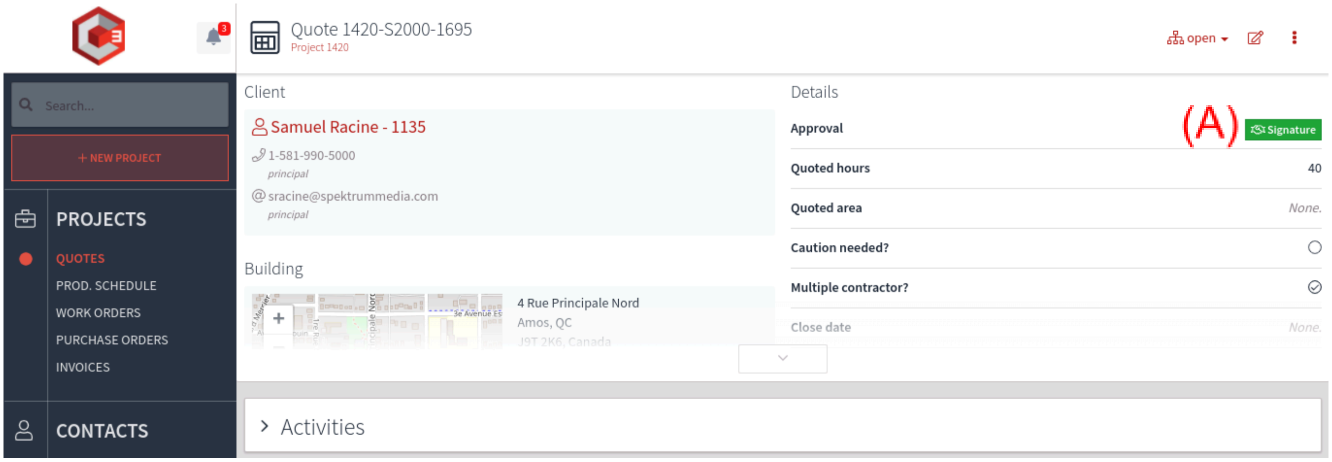
By clicking on *Approve*, you must enter the name of the person who accepts, then an email is sent to the person in charge of the project and to the client. It's the same for the refusal and the modification.



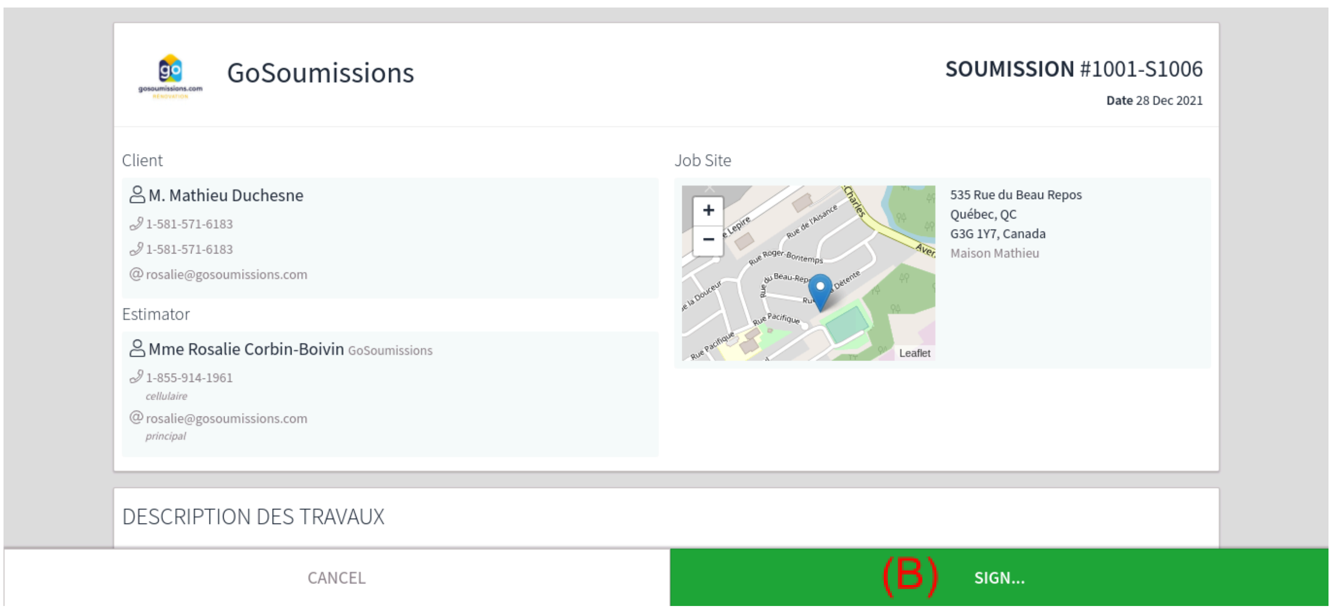
(A) Enter the name of the employee who accepts it.

(B) Enter notes and changes regarding the quote.

7.9.7.2. Via application

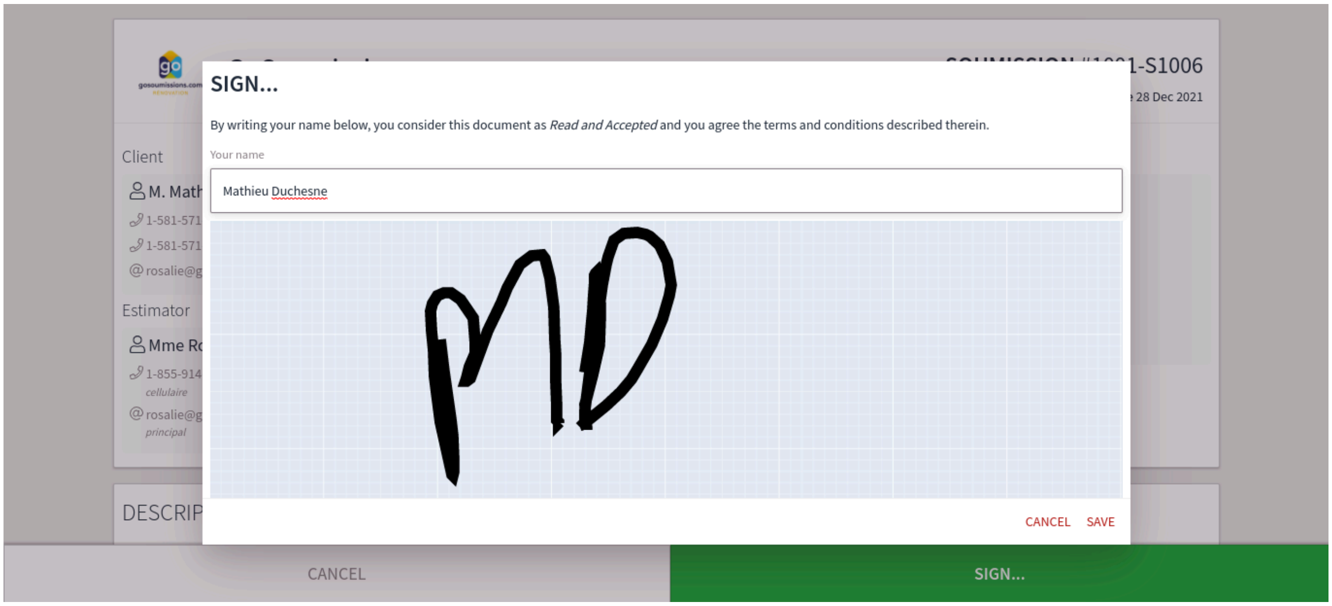


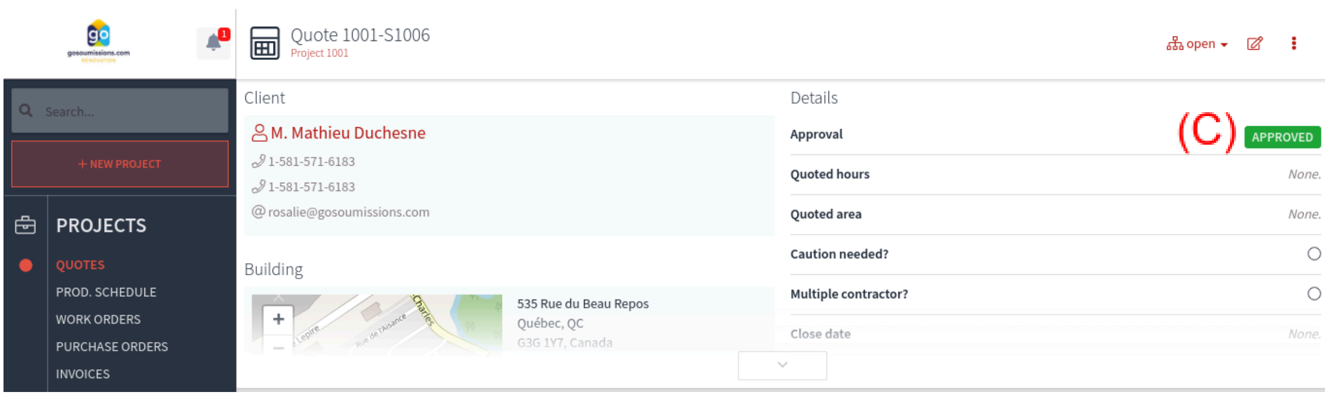
(A) Press the *Signature* tab to have the client sign on the screen of a phone or tablet. You need to choose what type of document you want them to sign and then the quote appears on the screen.



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

Example of an electronic signature



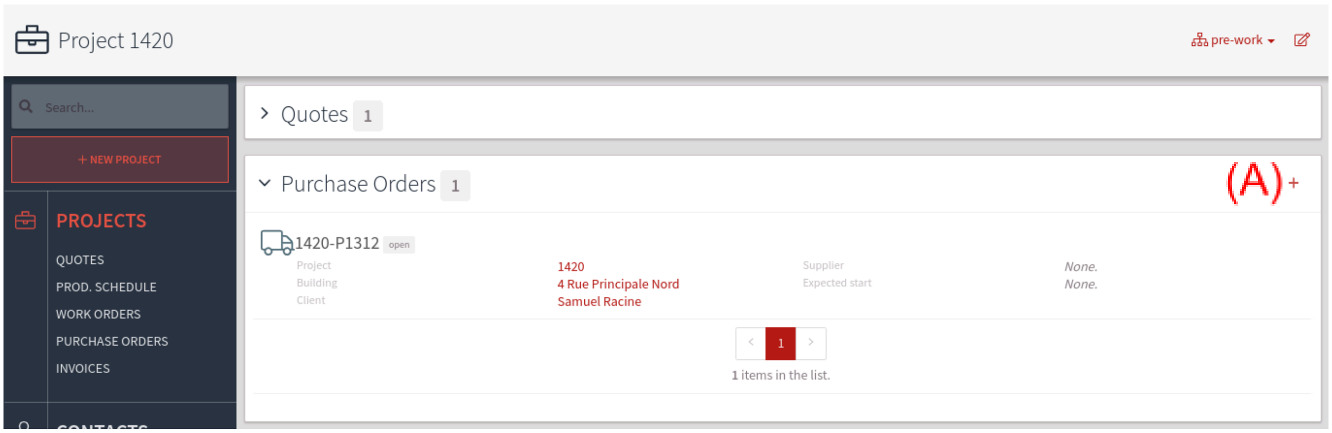


(C) The quote then becomes *Won* and the approval status is now *Approved*.

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.

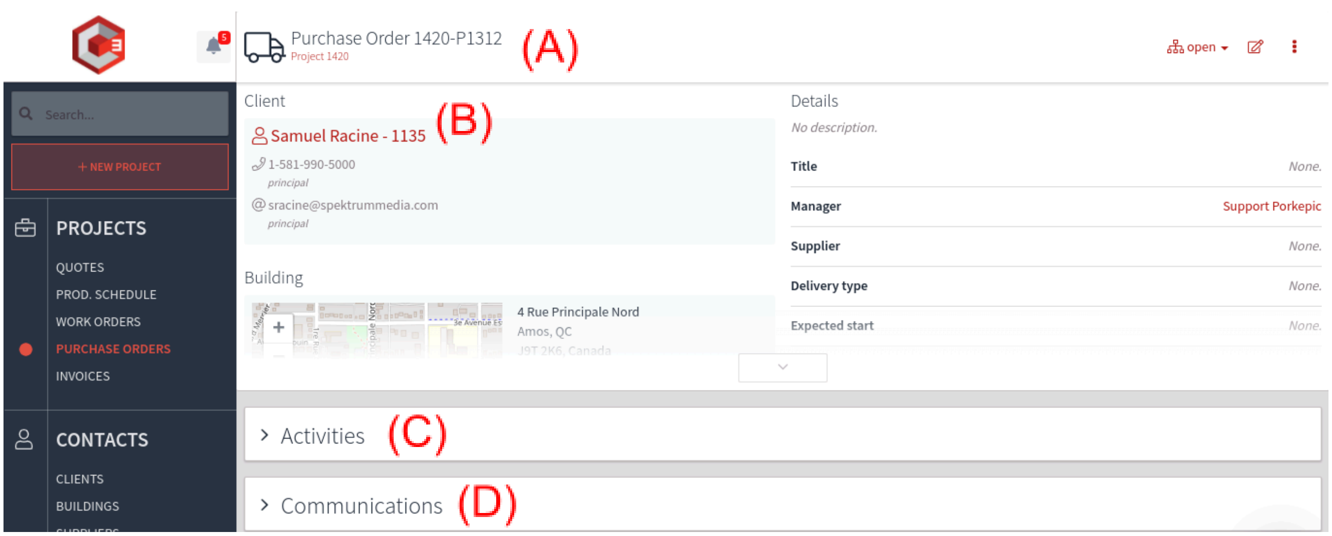
7.10.1. New Purchase order



(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.

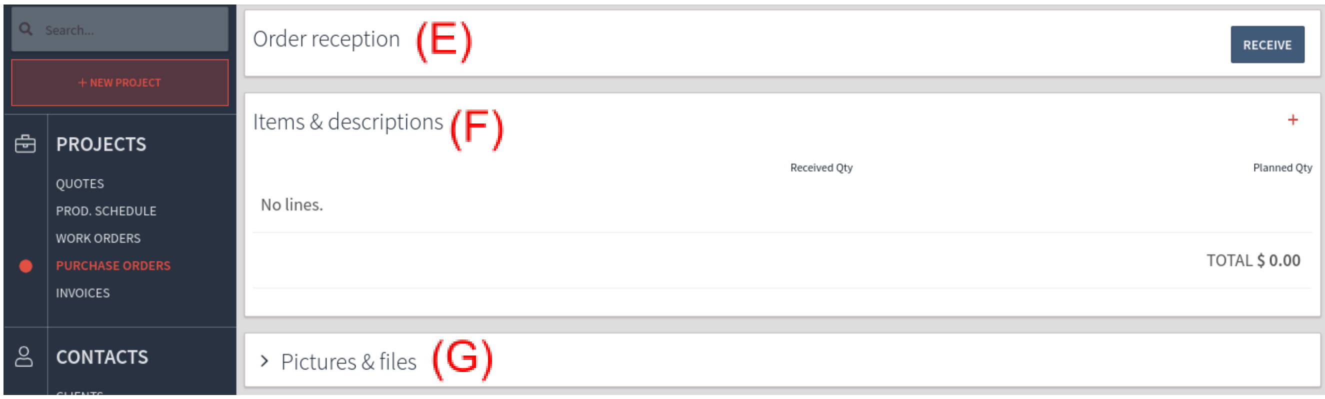


(A) The name and numbering are created automatically after pressing the + (previous step). It's possible to change the information in the small pencil on the right.

(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).



(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.

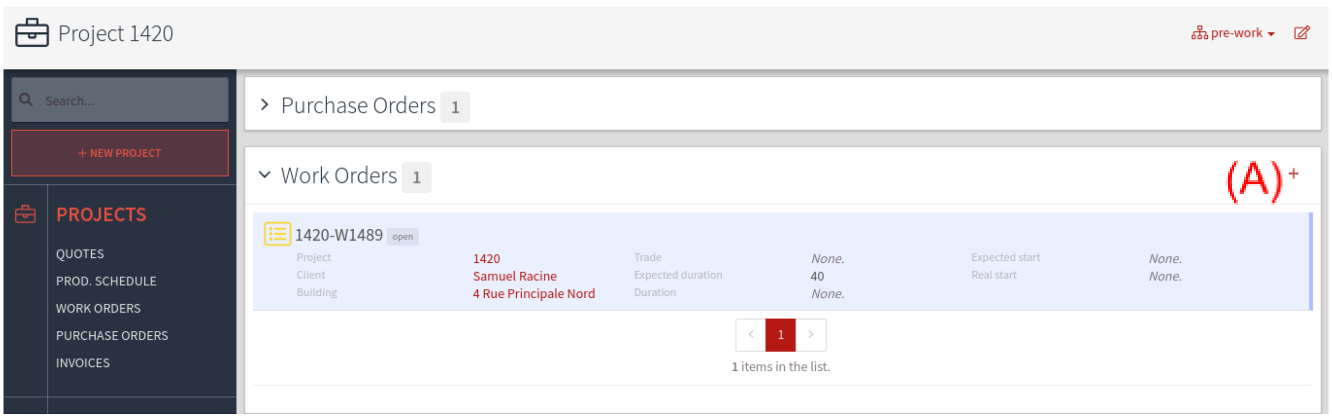
7.10.2.1. To send to the subcontractor

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

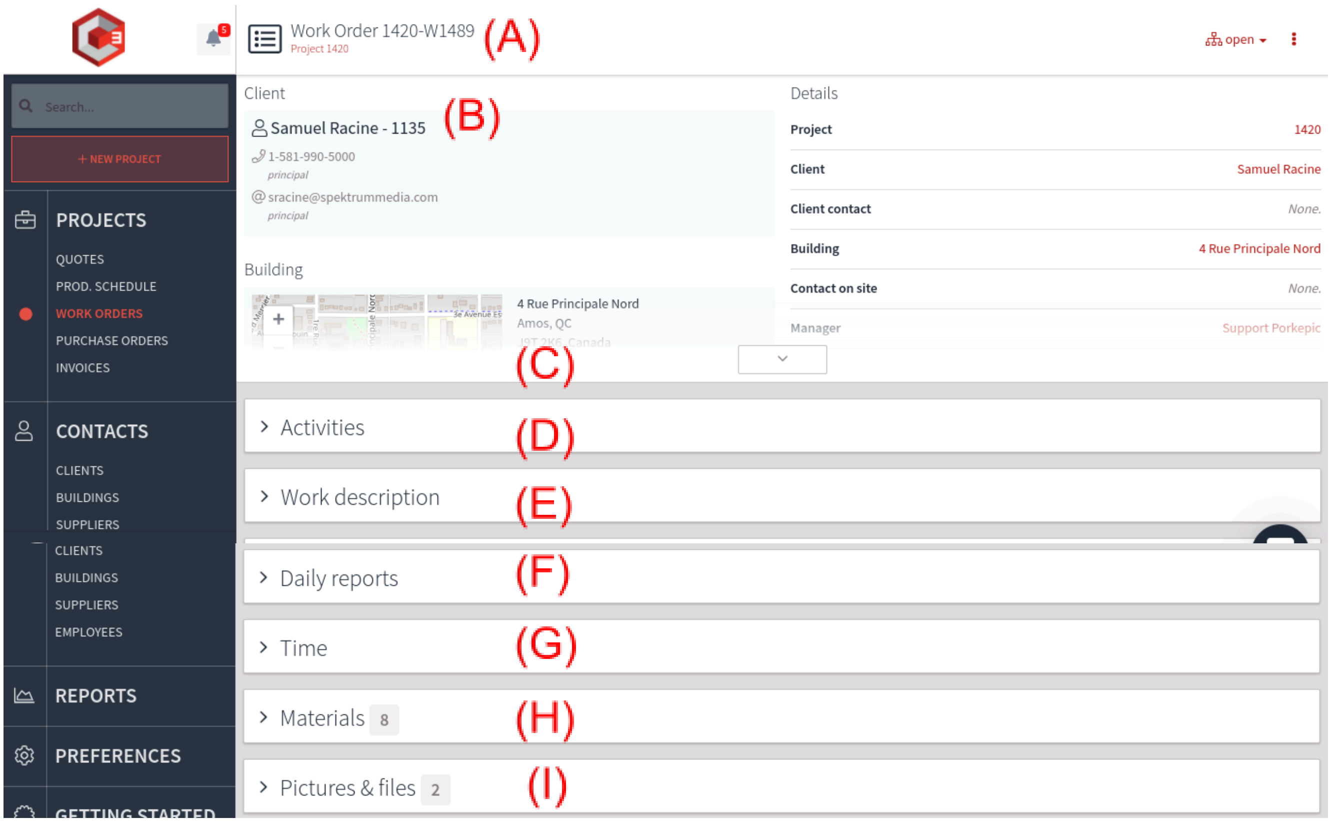
7.10.3. New Work orders



(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.



(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.

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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

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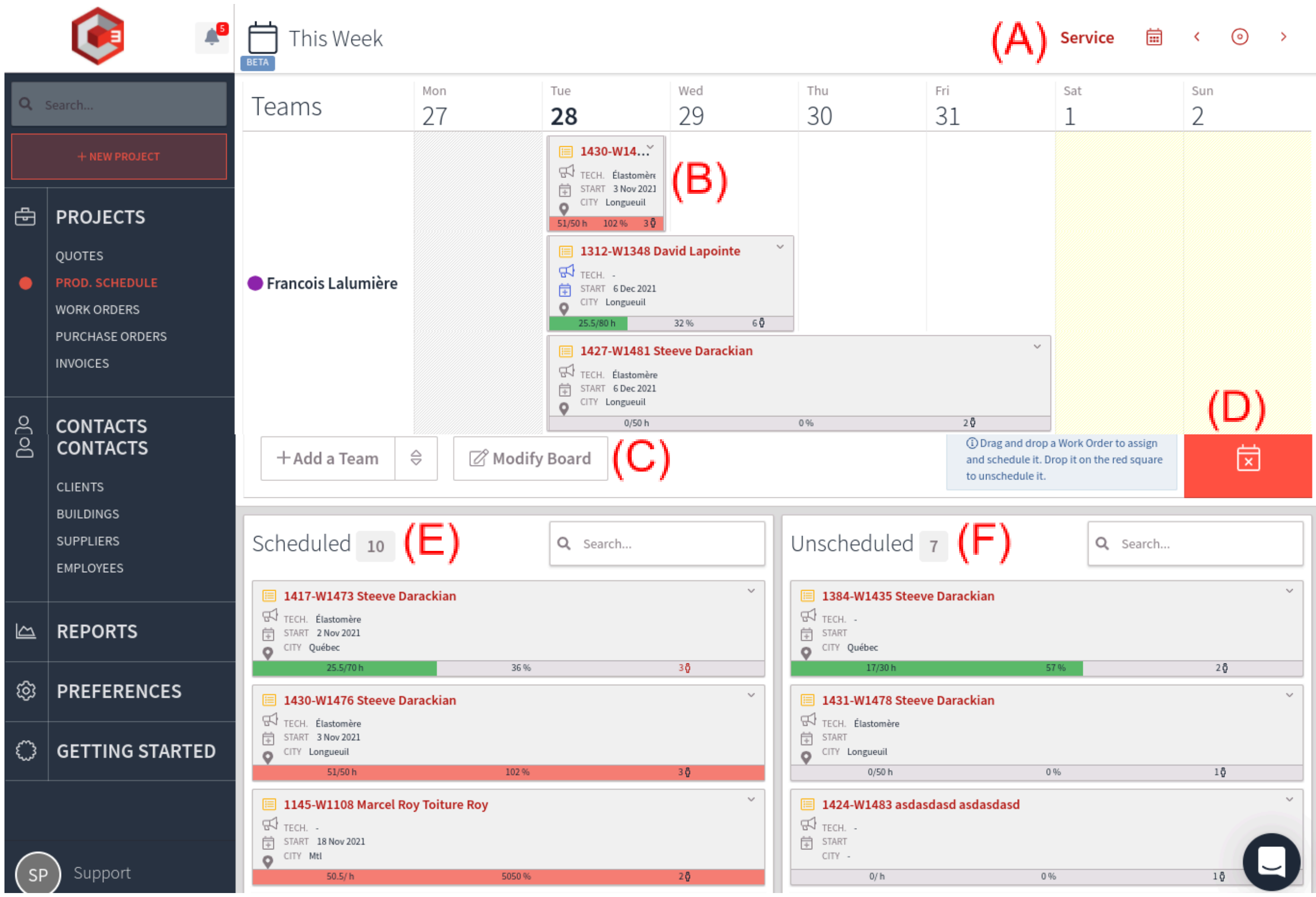
7.11. Construction stage

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.



(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.

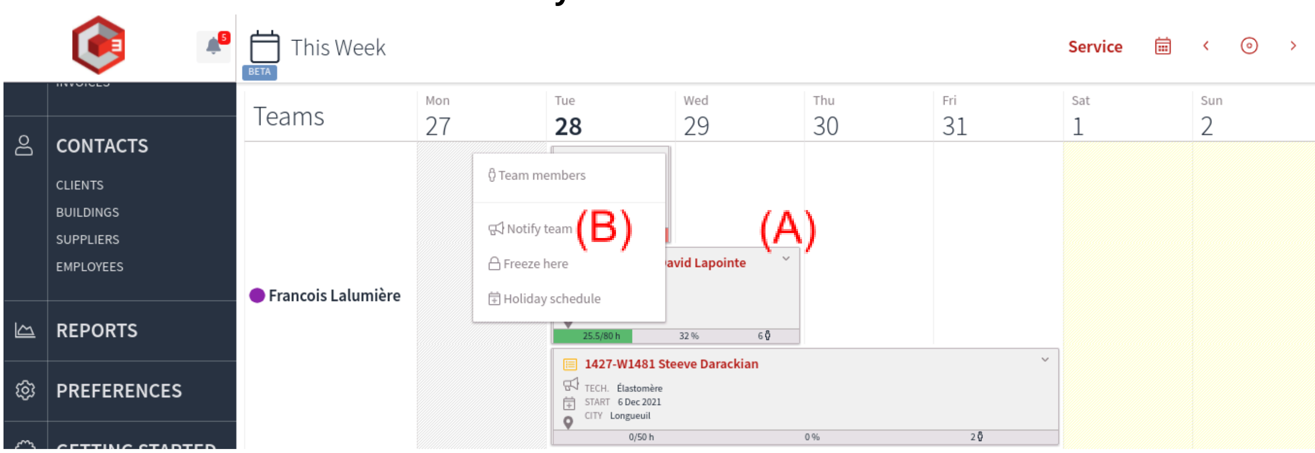
(D) Drag the work order onto the red box to remove it from the schedule. It's also possible to drag the work order to assign it and put it on the schedule.

(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



(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.

(A) Define the name of the table.

(B) Filter by profession.

(C) Filter by type of work.

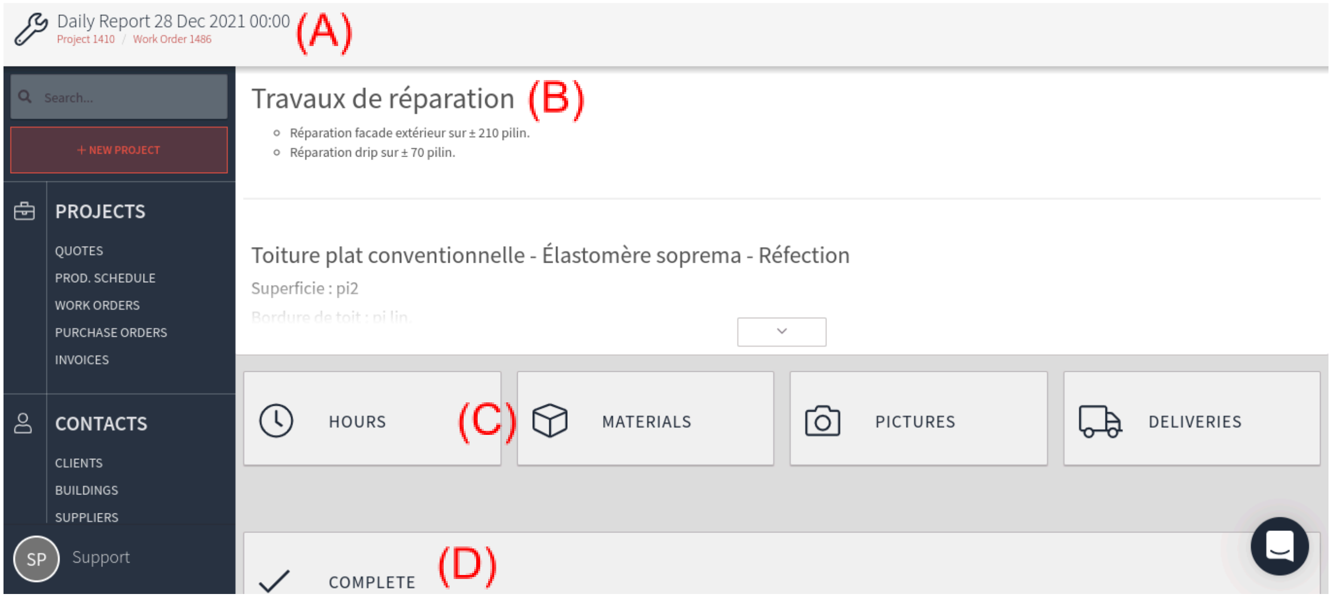
(D) Filter by type of property.

(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.



(A) The name is created automatically after pressing the + in the *Work order* section.

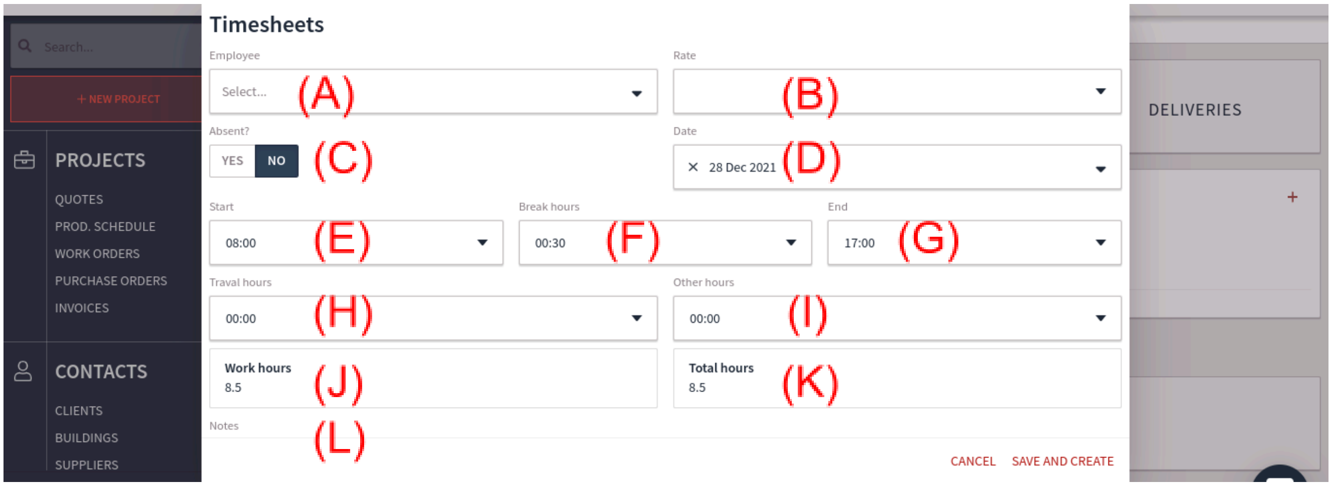
(B) All the information related to the client and the building are present.

(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.



(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.

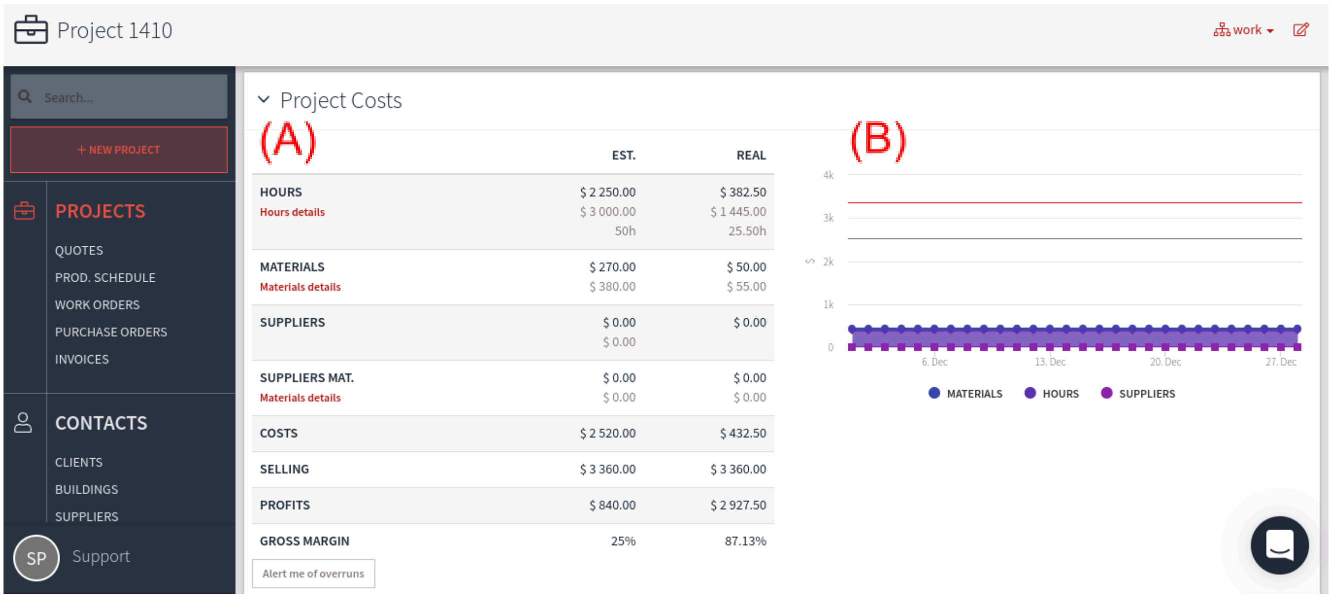
When all the tabs have been filled in, press *Complete* at the top right.
It's necessary to define:

- 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

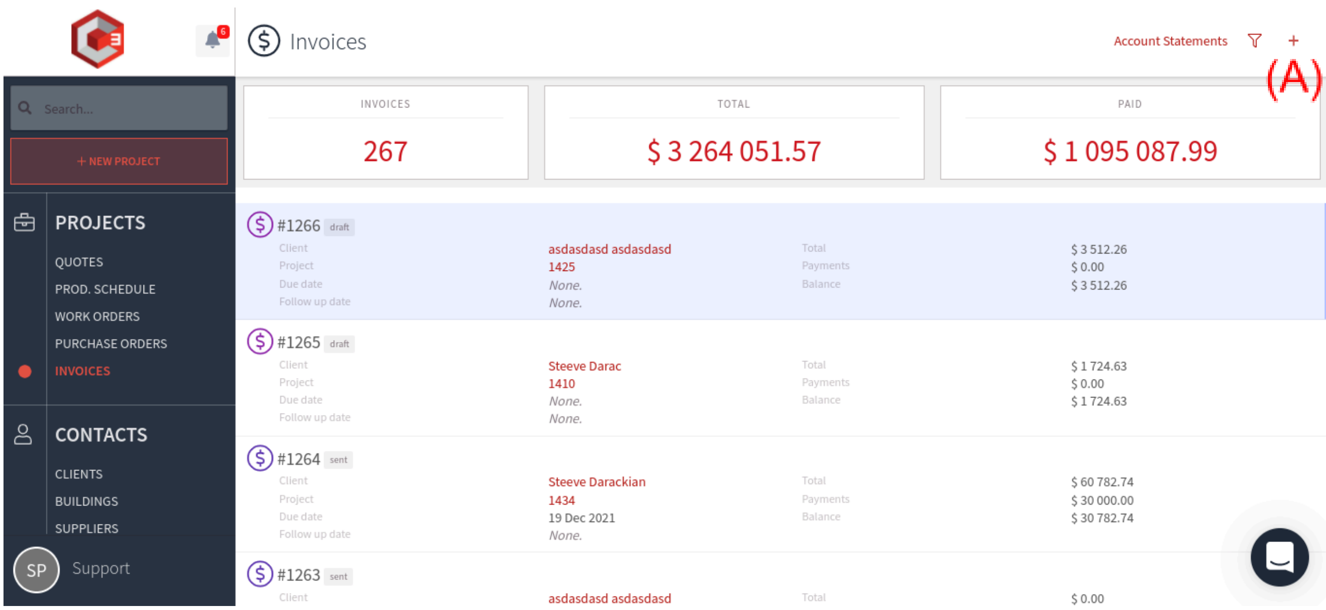
Purchase orders help assign costs to the project when they are received for the *Supplier materials* section. For materials that are not on a purchase order, they must be added manually. The *Real* column is completed using the costs on the receiving orders and manual entries.

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.



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

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

(B) The number of invoices.

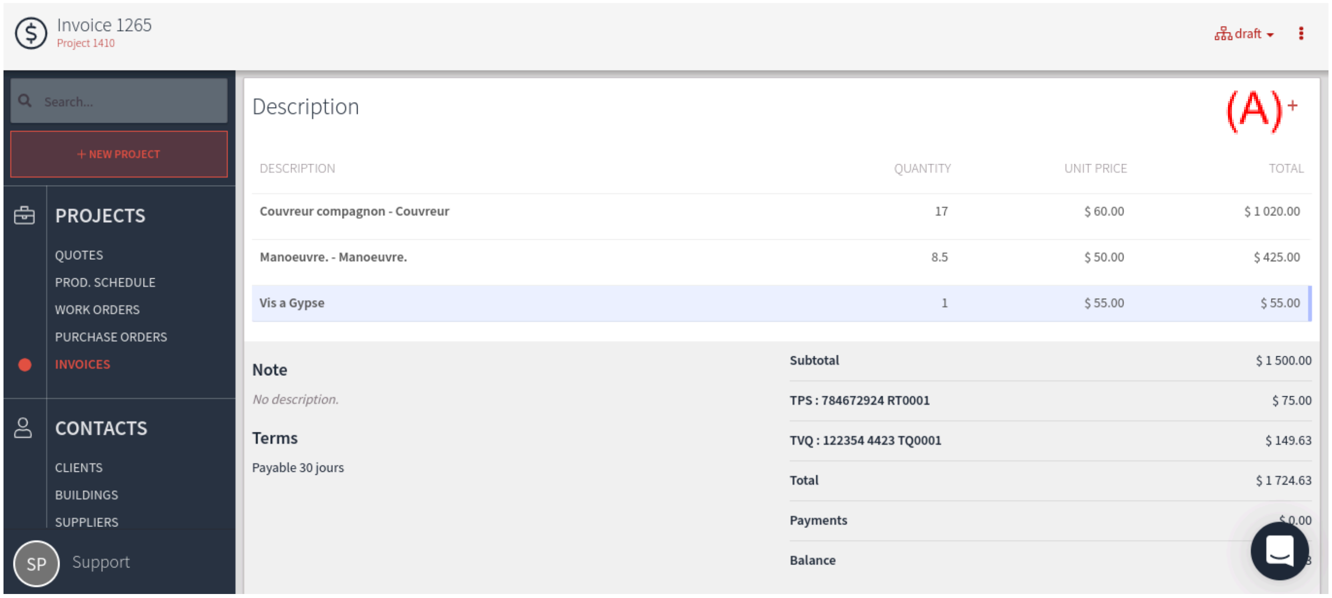
(C) The total amount of the invoices.

(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.



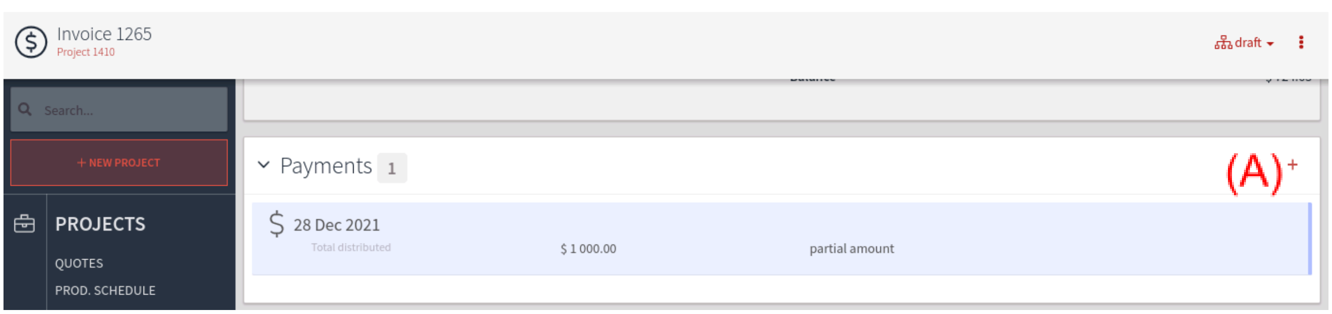
(A) Press the + on the right to add a description.

You must choose between:

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

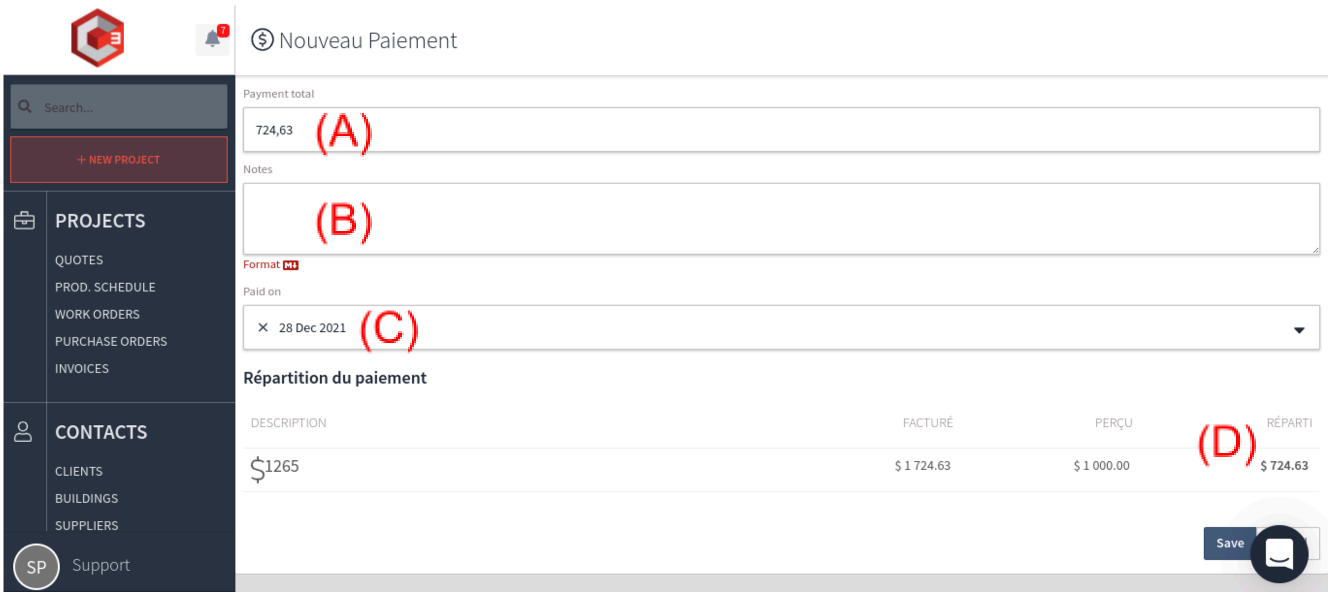
7.13.2.1. Payment

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.



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

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



(A) Enter the amount of the payment.

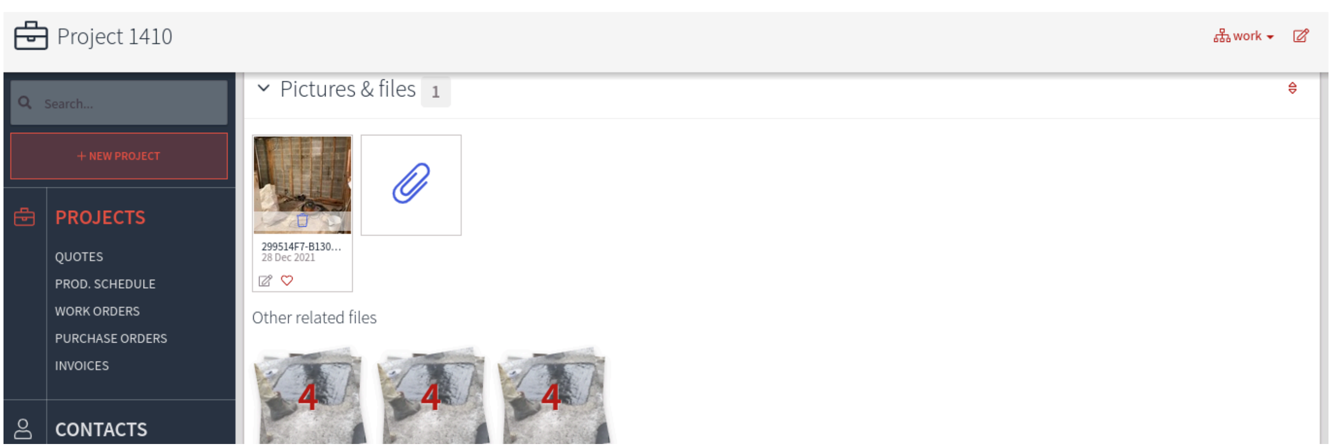
(B) Include notes if needed.

(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.



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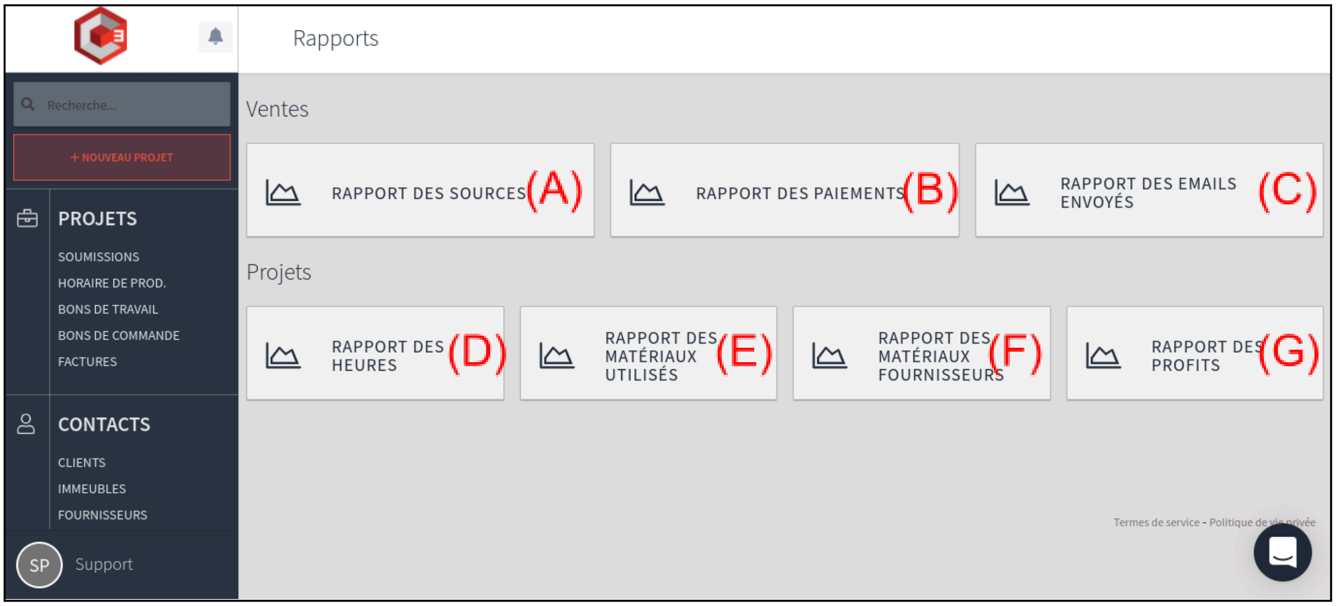
8. Management

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

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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.

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