



EagleView Estimator™ User Guide



1011 Main St

My Estimates ▶ 1011 Main St

Line Items

Roofing

General

QTY

0.00

UOM

SQ

Description

Tear off Existing Single Layer Roofing Down to Roof Decking & Dry In

0.00

SQ

Supply & Install #15 Felt Paper over Roof Decking

0.00

SQ

Supply & Install 3-Tab 25 Year Shingles - 3 Eds / Sq

0.00

LF

Supply & Install a Continuous Ridge Vent

Unit Cost

\$35.50 -

\$18.77 -

\$137.29 -

\$2.90 -

Extended

\$0.00

\$0.00

\$0.00

\$0.00

O&P

\$0.00

\$0.00

\$0.00

\$0.00

Notes

\$0.00

\$0.00

\$0.00

\$0.00

Total Cost \$0.00

Create POR

+ Add Line Item

Actions -

My Account

Order

Welcome, John Doe

Estimator -

Support -

View: Categories | Areas

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Overview


EagleView Technologies is the industry leader in developing technology solutions that automate traditionally manual tasks. The company invented the concept of 3D aerial roof measurements and its reports have become the industry standard in the construction and insurance industries. The EagleView Estimator is an easy-to-use estimating tool that seamlessly integrates EagleView's accurate measurement reports and offers catalogs from national, regional and local suppliers to provide contractors the ability to prepare extremely detailed and accurate estimates.

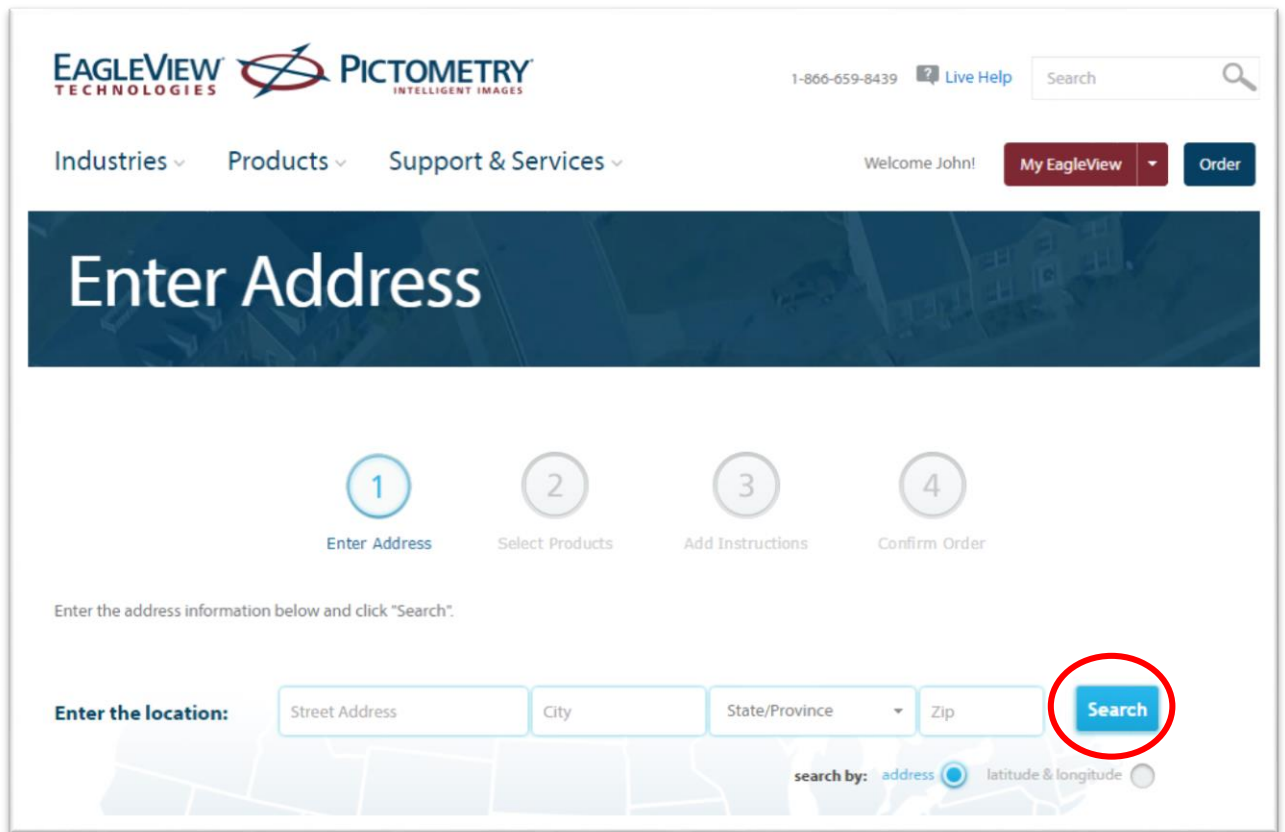
Benefits

1. Prepare accurate estimates using catalogs from national and regional building material suppliers
2. Preloaded construction lists allow for detailed estimates
3. Auto-generated Material Quote Request can be sent electronically to a building material distributor of choice for hassle-free material ordering
4. Provides a customized, detailed estimate to present a professional proposal to property owners
5. Positions contractors as innovative business practitioners while providing an important way to differentiate their services
6. Integrates with EagleView measurement reports to quickly generate an estimate and Material Quote Request
7. Easy to use
8. Completely portable, web-based application is accessible anywhere there is Internet or from a tablet/smartphone with cellular data

Getting Started

Place Order

Step 1: Visit www.eagleview.com, enter the address of the property and click  .



The screenshot shows the EagleView Pictometry website interface. At the top, the logo for EagleView Technologies and Pictometry Intelligent Images is displayed. To the right of the logo, there is a phone number (1-866-659-8439), a Live Help icon, and a search bar. Below the logo, there are navigation links for Industries, Products, and Support & Services. On the right side, there is a user greeting (Welcome John!), a My EagleView dropdown menu, and an Order button. The main content area features a large blue banner with the text "Enter Address". Below the banner, there is a four-step process flow: 1. Enter Address (highlighted with a blue circle), 2. Select Products, 3. Add Instructions, and 4. Confirm Order. Below the process flow, there is a prompt: "Enter the address information below and click 'Search'." The address entry form includes fields for Street Address, City, State/Province (dropdown), and Zip. A blue Search button is highlighted with a red circle. Below the form, there is a search by: address (selected) and latitude & longitude (unselected) options.

Step 2: Verify the property location and type

A satellite image appears to verify that the marker is on the correct property. Click and drag the marker to the correct structure if necessary. After verifying that the property location is correct, indicate whether the property is residential or commercial before proceeding. This selection can be made using the drop-down menu above the **Next >** button.

Enter Address

1
Enter Address

2
Select Products

3
Add Instructions

4
Confirm Order

Select which structure you want to measure below, then click "Next"
If you do not see the property on the map or are unsure of its location, please skip this step and proceed with placing the order.

⚠ Please verify that we have successfully identified the property at the address you have provided.

Address

Street:

State/Province:

Latitude & Longitude

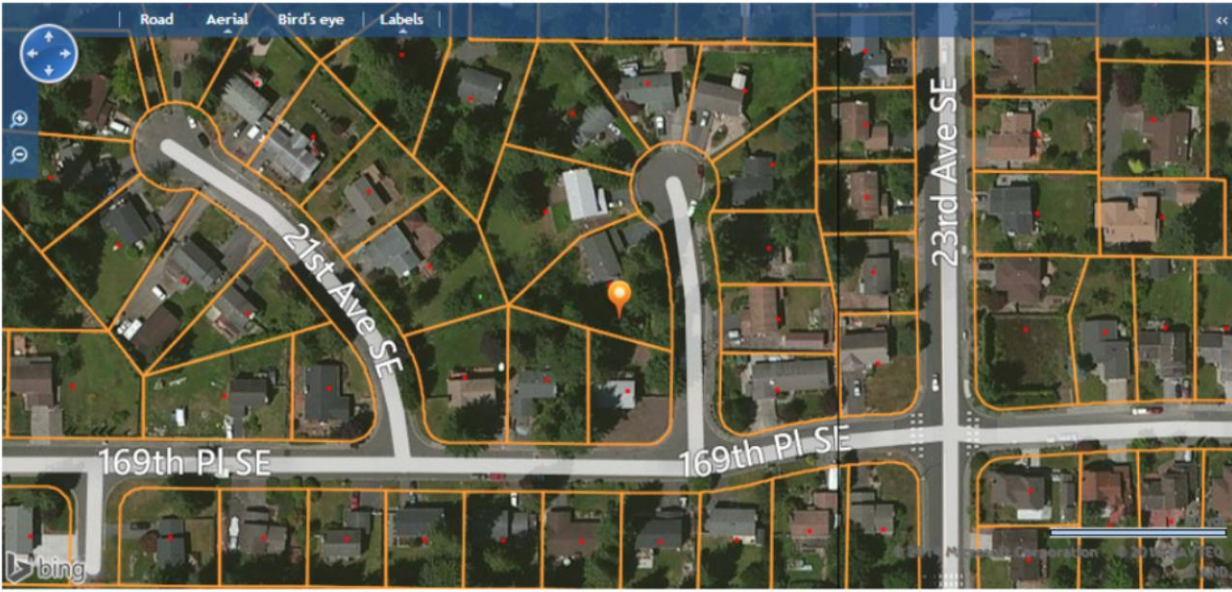
Latitude:

City:

Zip/Postal Code:

Longitude:

Road Aerial Bird's eye Labels



Select Property Type:

Property type will be validated by EagleView when order is processed.

Step 3: Log in or create a new account

If you already have an EagleView account, enter your login Email and Password and click

LOG IN

Click to create your EagleView account

Register

The screenshot shows the EagleView Technologies website. At the top left is the logo for EagleView Technologies and Pictometry Intelligent Images. To the right of the logo are the phone number 1-866-659-8439, a Live Help icon, and a search bar. Below the logo are navigation links for Industries, Products, and Support & Services. On the right side of the header are links for Create Account, Log In, and Order. The main content area has a large blue banner with the text "Log in". Below the banner, there are two columns of content. The left column is titled "Log in to My EagleView" and contains a login form with a text input field containing "johndoe@training.com", a password input field with masked characters, a "Forgot password or trouble logging in?" link, a "LOG IN" button, and a "Remember me" checkbox. The right column has two sections: "No EagleView Account Yet?" with a "Register" button, and "Looking for PictometryOnline?" with a "Go to PictometryOnline" button. At the bottom of the page, there is a note for Pictometry Customers: "Pictometry Customer? If this is your first time logging in to your new EagleView account, click here for assistance."

Step 4: Select products

Select the desired Measurement product. Add the Estimate product to the order and select [Next >](#).

Delivery options (regular or expedited) can be chosen directly underneath the icon. View more information about the different report types by clicking on the [?](#) next to the report title.


Select Products

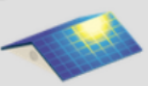
1 Enter Address ✓ 2 **Select Products** 3 Add Instructions 4 Confirm Order


When possible we will combine products into a single product and deliver them at the same time.


Measurement Products

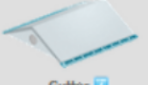
Roof

 Premium [?](#)
Regular Delivery ▼

 Solar [?](#)
Regular Delivery ▼

 Standard [?](#)
Regular Delivery ▼

 Walls [?](#)
Regular Delivery ▼

 Gutter [?](#)
Regular Delivery ▼

Estimate Products

Estimate [?](#)
Regular Delivery ▼


Order Information [?](#)

Property Type:
Residential

Roof Size:
- Select Squares - ▼

Products:
Premium -
Regular Delivery -
Estimate -
Regular Delivery -
Estimated Total: -

Did you know?

 You can add a Wall Measurement Report for this property & get 20% off the combined price!

< Back **Next >**

Step 5: Add instructions, report options and customization

Please indicate if there have been changes to the structure in the last 4 years and include any special instructions or information related to the order. Indicate substitution preferences and check the boxes to include a property owner report and customized report cover. Select [Next >](#) to continue.

Add Instructions

1
Enter Address ✓

2
Select Products ✓

3
Add Instructions

4
Confirm Order

Fill out the information below, then click "Next".

Measurement Instructions:

Measure: 📏
Primary Structure + Detached Garage ▼ Your report will include the primary structure and a detached garage if one exists.

Include Special Instructions:

Changes in the last 4 years

Claim & Property Information

Claim Number: Claim Information:
PO Number: Building ID:
Date of Loss: 📅
Cat ID:

Order Information ?

Property Type:
Residential

Roof Size:
N/A ▼

Products:

Estimate	\$0.00
Regular Delivery	\$0.00

Estimated Total: \$0.00

Add-ons & Custom Cover Page

Select Report Add-ons: Property Owner Report

Include a Custom Cover page: Custom Cover Page

[Edit](#)

[< Back](#) [Next >](#)

Step 6: Confirm information and place the order

Review that the property information is correct and select additional file types that you would like to receive. Select [Place Order](#) to submit the order.

Confirm Order

1 Enter Address ✓ 2 Select Products ✓ 3 Add Instructions ✓ 4 Confirm Order

Review your report details and enter your payment information below, then click "Place Order".

Order Details

Street: 123 Main Street
City: Any Town
State: WA
Zip: 98012
Structure: Primary Structure + Detached Garage
Changes: No structural changes in last 4 years

Optional

Send a copy to:

You can send a copy of the report to additional email address(es).

Specify Additional Formats:
(Not available for all reports)

DXF XML
 RXF

Order Information

Property Type: Residential
Roof Size: N/A
Products: [Edit Order](#)
Estimate \$0.00
Regular Delivery \$0.00
Estimated Total: \$0.00

Payment Information

Promotion Code: [Apply](#)

Your account payment is handled by your parent company.

By ordering a report you agree to our [Terms of Use](#).

[< Back](#) [Place Order](#)

Step 7: Receive confirmation

After submitting the order a confirmation message will appear.

Order Submitted

✔ Thank you. Your order is being processed.

Order number: **8006984**

Report Details

Street:	123 Main Street	Product Type:	Estimate
City:	Any Town	Availability:	You will receive an email when your estimate is ready. If you also ordered a measurement report your estimate will not be available until that is completed.
State:	WA	Structure:	Primary Structure + Detached Garage
Zip:	98012	Changes:	No structural changes in last 4 years

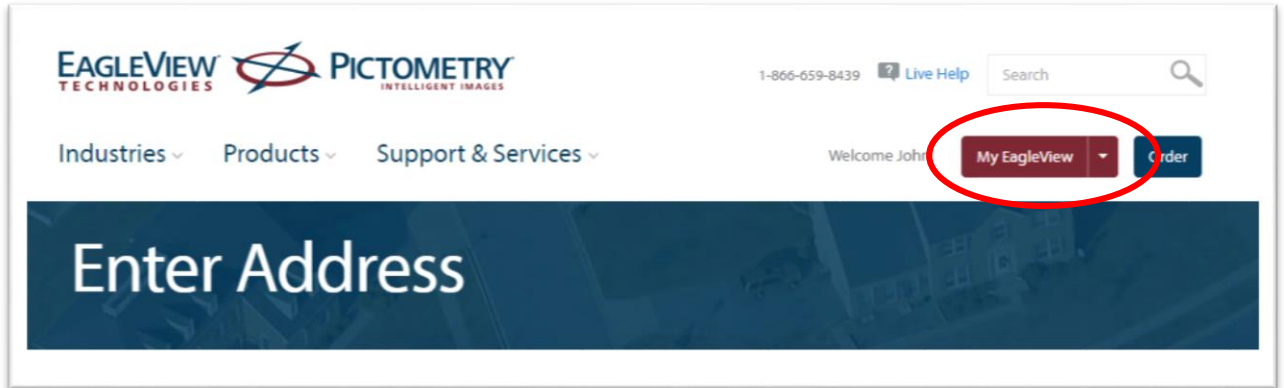
You can track the status of your order on the [Order History](#) page.

You can update and set your order preferences on your [Account Settings](#) page.

[Place another order >](#)

Create the Estimate

An email will be sent when the report and estimate are available. To create the estimate, click on the link within the email or log into My EagleView by clicking on the My EagleView button in the upper right corner of the EagleView website.



From My EagleView, click on the Reports & Order History.

EAGLEVIEW TECHNOLOGIES **PICTOMETRY INTELLIGENT IMAGES** 1-866-659-8439 [Live Help](#)

Industries ▾ Products ▾ Support & Services ▾ Welcome John! [My EagleView](#) [Order](#)

My EagleView

Account Summary		
Custom	207	1
Membership Level	My Orders Received	My Orders Pending

Latest Orders			
Report #	Type	Date	
0946102	Estimate	Nov 10 2014	+
9201147	Estimate	Aug 20 2014	+
9201546	Premium	Aug 20 2014	+

- Reports & Order History**
View and access your reports and order history.
- Email & Password**
Change your password and notifications.
- Billing Information**
View and edit your billing information.
- Contact Information**
View and edit your contact information.
- Account Settings**
Edit and customize your EagleView settings & how your reports are handled.
- Text Alert Settings**
Sign up or edit your EagleView text alert settings.
- My Estimates**
View, edit and manage your estimates.
- Payment Options & Membership Level**
Update your payment option & review your membership level.

A listing of all ordered reports and estimates will appear. Locate the address for the Estimate you'd like to create. Simply find the address of the property and identify the Estimate in the Material Type column or filter the listing by Estimate Material Type. Click on Manage in the Actions column to open the Estimator.

My Eagleview >

Reports & Order History

Manage your reports and view your order history. You can also filter by report attributes, or export your list to Excel.

Filter By

From: 3/24/2013 To: 3/24/2014

Claim #:

Status: All

Batch ID: Any

Product Type: Any

Cat ID: Any

[Filter](#)

Reports (1 - 20 of 44)

Report #	Date	Product Type	Address	Claim #	Delivery	Cost	Status	Actions
8006984	03/24/2014	Estimate	123 Main Street, Any Town		Regular	\$0.00	Completed	Manage
8006738	03/24/2014	Estimate	123 Main Street, Any Town		Regular	\$0.00	Completed	Manage

If you ordered an Estimate material only without an EagleView measurement report, you will be taken to the **Estimator Line Items**. This page will allow you to add line items or to Import an EagleView Report

Welcome, John Doe Estimator Support My Account Order

84025 Total Cost

My Estimates > 84025 [+ Add Line Item](#) [Actions](#) [Create List](#)

Line Items Info Markup Labor Areas

Add Line Items, Add a Template, or Import an EagleView Report.

Import an EagleView Report

Import an EagleView Report

EagleView Technologies roof measurement reports include the roof measurements needed to estimate and order materials for roofing projects. You can order an EagleView report from the EagleView website (<http://thd.eagleview.com/>).

Once the roof measurement report is received, make note of the report number. The report number is needed to import the EagleView report in Estimator.



The screenshot shows the EagleView Technologies website interface. At the top left is the EagleView Technologies logo. To the right of the logo, the text 'Welcome, John Doe' is displayed, followed by navigation links for 'Estimator', 'Support', 'My Account', and 'Order'. The main heading is 'Import an EagleView Report'. Below this heading, there is a label 'EagleView Report Number' above a text input field containing the number '9291546'. To the right of the input field is a dark blue button labeled 'Get Report'.

When an EagleView report is imported, the Estimator application calculates the quantities for the line items and cost of the materials needed for the roofing project and builds a materials list with the quantities and costs of the materials selected.

Click on the Link to open the Import an EagleView Report Wizard. Enter the Measurement Report Number and click on Get Report.

Import an EagleView Report

EagleView Report Number

[Get Report](#)**We found your report!**[← View Notes Diagram for this report.](#)
(cancel)

Quality:

- Good
- Better
- Best

Line Item Type:

- Combined Labor & Material
- Separate Labor & Material

	Import EagleView Report Attributes	Select SKU
Shingles	<input type="text" value="Composite - 25 Yr - 3 Tab"/> ▾	Link
Ridge Vent	<input type="text" value="Continuous"/> ▾	Link
Underlayment	<input type="text" value="15 # Felt"/> ▾	Link
Hip Shingles	<input type="text" value="Composite - 25 Year - 3 Tab"/> ▾	Link
Step Flashing	<input type="text" value="Metal Stepped Flashing"/> ▾	Link
Drip Edge	<input type="text" value="Aluminum Drip Edge"/> ▾	Link
IWS – Eave	<input type="text" value="Single Layer"/> ▾	Link
IWS – Rake	<input type="text" value="Single Layer"/> ▾	Link
IWS – Valley	<input type="text" value="Single Layer"/> ▾	Link
Valley Metal	<input type="text" value="W-Style Metal"/> ▾	Link
Ridge Shingles	<input type="text" value="Composite - 25 Year - 3 Tab"/> ▾	Link
Straight Flashing	<input type="text" value="Metal"/> ▾	Link
Parapet Coping	<input type="text" value="Coping Cap"/> ▾	Link

[Next](#)

Selections for the estimate are set on this screen. When the selections are complete, the Next button will open the Line Item screen with new line items that have quantities that are generated from the EagleView Report.

1011 Main Street-2

(Change)

List Total \$0.00

Estimate: 1011 Main Street-2 ▸ List: 1011 Main Street-2

+Add Line

Actions ▾

Create Quote

Search your list...



<input checked="" type="checkbox"/>	Description	SKU#	Category	Unit Price	UoM	Qty	Item Total	Delete
<input checked="" type="checkbox"/>	15# Felt Underlayment - 432 SF	SKU#	Category	0.00	ROL	5	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	25 Year Shingles - 3 Bdl/Sq	SKU#	Category	0.00	BDL	54	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	D Style Galvanized Steel Drip Edge - 1l	SKU#	Category	0.00	EA	30	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ice and Water Shield - 1.5 Square Roll	SKU#	Category	0.00	ROL	9	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ridge/Hip Cap Shingles - 30 LF	SKU#	Category	0.00	BX	3	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Rolled Metal Flashing - 50 Ft Roll	SKU#	Category	0.00	LF	2	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Roof Louver Vent	SKU#	Category	0.00	EA	1	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	25 Year 3-Tab Shingles - 3 Bdl/Sq	SKU#	Roofing	0.00	BDL	151	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ridge Vent - 20 Ft	SKU#	Roofing	0.00	EA	7	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	15# Felt Underlayment - 432 SF	SKU#	Roofing	0.00	ROL	9	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	4, 8 and 12 Inch Step Flashing	SKU#	Roofing	0.00	EA	142	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Aluminum Drip Edge - 10 Ft Piece	SKU#	Roofing	0.00	EA	41	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ice and Water Shield - 225 SF	SKU#	Roofing	0.00	ROL	7	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Galvanized Steel W Valley Flashing - 2'	SKU#	Roofing	0.00	EA	8	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Domer Flashing - 10 Foot	SKU#	Roofing	0.00	EA	150	\$0.00	<input checked="" type="checkbox"/>

+Add Line

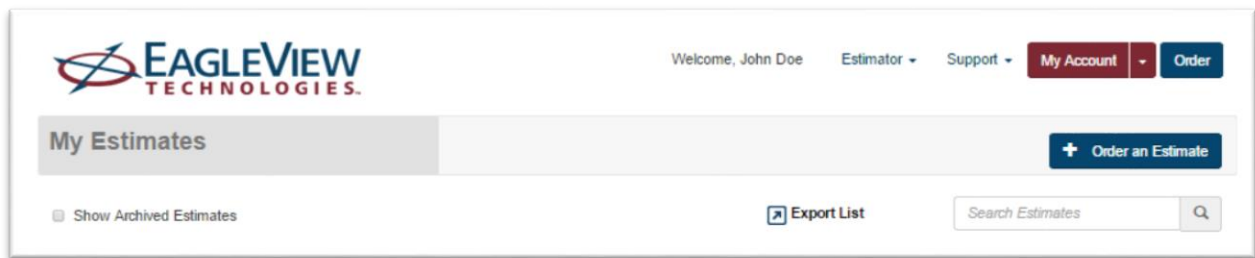
List Total \$0.00

Create Quote

Navigation Overview

This system was designed for effortless navigation. System screens are consistent in each function and all application movement happens at the top navigation area. The top navigation area contains the main menu for the system and is always available from each screen.

Top Navigation Bar



See the top **navigation bar shown above**: Estimator, Support, My Account, and Order. This navigation bar is always visible.

Estimator is the menu to navigate to [Work Areas](#) and [Manage](#) company templates and clients

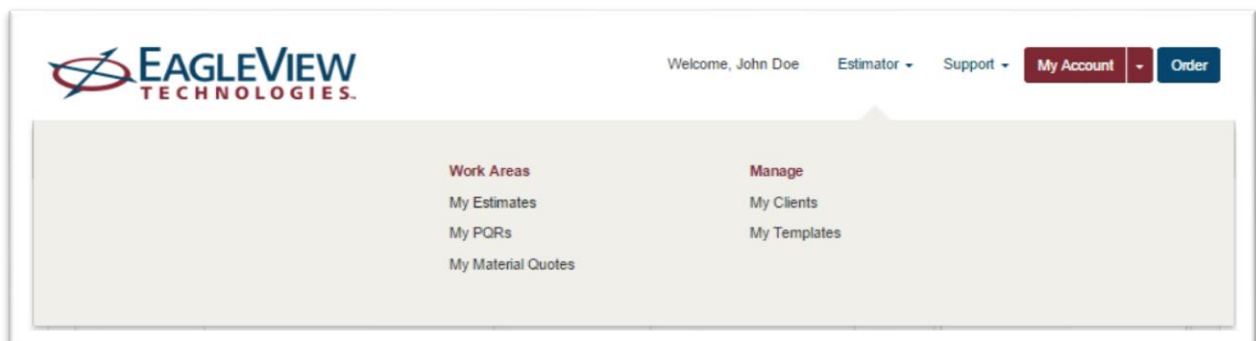
Support is a menu of links for help with working with the Estimator

My Account is a menu of links to company defaults and to view the estimates and measurements ordered from EagleView Technologies.

Order is a link to the Order Manager at EagleView Technologies where you are able to order measurement reports to be used in the Estimator.

Estimator

The Estimator tab is where My Estimates, MyPQRs, My Material Orders, My Templates and My Clients are stored in the system.



My Estimates

The Estimates link contains a listing of current estimates stored in the system.

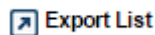
EAGLEVIEW TECHNOLOGIES. Welcome, John Doe Estimator Support My Account Order

My Estimates

Show Archived Estimates [Export List](#)

Date Created	Estimate Name	Address	Client Name	Report #	Status	
08/20/2014	Bathrooms-20140100	1236 Parkwood Blvd	Schmo , Joe	9291546	Estimating	<input type="checkbox"/>
06/13/2014	Roof Replacement	72 Greenhill Ct	Brown , Toby	8688325	Estimating	<input type="checkbox"/>
06/11/2014	Roof Repairs	123 Main Street	Sunday , John		Estimating	<input type="checkbox"/>
03/24/2014	84025	123 Main Street			Estimating	<input type="checkbox"/>
05/29/2013	Asphalt Roof Replacement-JOB000052	1011 Main Street	Johnson , Chris	5378891	Estimating	<input type="checkbox"/>
05/24/2013	123 Main Street-9	123 Main Street		6537113	Estimating	<input type="checkbox"/>

Place a checkmark here to show archived estimates along with active estimates. An archived estimate is any estimate in a No Job or Completed status.



Will create a .csv file that can be exported or uploaded into other software or programs.

Estimates can be sorted by Date Create, Estimate Name, Address, Client Name, Report Number or Status. Select the column header to activate the sort. Click on it again to switch from Ascending to Descending Order.

A search feature is also available on the Estimates listing page. Type a search term in the text box and all client records containing that search term will appear in the listing below. Clear the text box to clear the search.

+ Create New List - Click to open the Create New List page where you'll enter a list name and location to create a new list.



Click this icon to open the estimate work area for the selected estimate.



Click this icon to delete the estimate. Note: If an estimate was ordered from the EagleView Order Manager, the Delete option will not be visible.

Estimate Status - may be changed from this work area by clicking the Status drop-down box in the Status column.

My PQRs

The My PQRs page displays a list of the PQRs that have been created through the estimator or directly as a PQR, including those lists that materials have been ordered from. Different lists can be kept for different types of projects and materials can be ordered for several projects using the same materials list.


Lists are available as long as they are not deleted by the user.

Name	Created	Items	Go to Estimate	Duplicate	Delete
1011 Main Street-2	2014-10-08T16:46:27.99	15	Go to Estimate	Duplicate	Delete
1011 Main Street-22	2014-10-08T16:46:27.99	9	Go to Estimate	Duplicate	Delete
1011 Main Street-37	2014-10-08T16:46:27.99	8	Go to Estimate	Duplicate	Delete

+ Create New List - Click to open the Create New List page where the name and location can be entered to create a new list.

Sort by - Click and select **Name** or **Date** to sort the list alphabetically by name (A - Z or Z - A) or by date created (most recent to least recent or vice versa). If an option is clicked twice the sort order is reversed.

Items per page - Click and select the number of items to view on this page.

Search Box - Type the name of the list to search for and press **ENTER** or click . This feature can be helpful when there are several pages of lists. Type the entire name or any part of it.

PQR Name - Click the name of the PQR to open the work area for the PQR

Go to Estimate - Designates that this PQR was created from line items in an estimate. Click this link to return to the Estimate Work Area for this PQR.

Duplicate - Click to create a duplicate list of the materials list shown on the same row as the Duplicate button.

Delete - Click the row to delete a list

<<Prev and Next>> - If there are more items than can be displayed on this page (dependent on the selected items per page), click to view the Previous or Next page of items.


My Material Quotes

The My Material Quotes page shows your order history. There is one row for every order placed—both currently pending orders and past orders.

The screenshot shows the EagleView Technologies user interface. At the top left is the company logo. To the right, it says 'Welcome, John Doe' followed by 'Estimator', 'Support', 'My Account', and 'Order' buttons. Below this is a 'My Quotes' section. It has a 'Sort By: Order Date' dropdown and an 'Items per page: 10' dropdown. A search box labeled 'Search Orders...' is on the right. Below the filter section, there is a table with one row for 'EagleView Import'. The table shows the order number '#135' and the total amount '\$2,093.00'. Below the table, it says 'Location: MIDTOWN 159' and 'Order Placed May 27, 2014 9:14:44 AM'. To the right of the table, there is a 'View Details' button and a link 'Create a list from quote'.

Sort by - Click and select **Name** or **Date** to sort the list alphabetically by name (A - Z or Z - A) or by date created (most recent to least recent or vice versa). If an option is clicked twice the sort order is reversed.

Items per page - Click and select the number of items to view on this page.

Search Box - Type the name of the list to search for and press **ENTER** or click . This feature can be helpful when there are several pages of lists. Type the entire name or any part of it.

View Details – Click to open the Order History page and view the details of an order. On the Order History page, click the button to export the order details in Adobe PDF format or in Microsoft Excel CSV format.

Go to Estimate – Designates that this PQR was created from line items in an estimate. Click this link to return to the Estimate Work Area for this PQR.

Create a list from order - Click this link (under the View Details button) to create a new materials list from the materials on an existing order.

<<Prev and Next>> - If there are more items than can be displayed on this page (dependent on the selected items per page), click to view the Previous or Next page of items.

My Clients

The My Clients link contains a listing of current clients stored in the system.

	First Name	Last Name	Address	City	State	Postal Code	
	Aaron	Doe	1011 Main Street	Any Town	WA	98012	
	Aaron	Rodgers	123 Main Street	Any Town	WA	98012	
	Alex	Smith	1011 Main Street	Any Town	WA	98012	
	Bob	Jones	1011 Main Street	Any Town	WA	98012	
	Bruce & Nancy	Kallenberg	9660 13th Ave S	Bloomington	MN	55425	
	Byron & Pamela	Little	6924 Howard Ln	Eden Prairie	MN	55346	
	Chris	Johnson	1011 Main Street	Any Town	WA	98012	
	Chris	Johnson	123 Main Street	Any Town	WA	98012	
	Clint	Abbott	1011 Main Street	Any Town	WA	98012	
	Gina	Red	1011 Main Street	Any Town	WA	98012	
	Jack	Peterson	123 Main Street	Any Town	WA	98012	
	Jack	Peterson	123 Main Street	Any Town	WA	98012	

Clients can be sorted by First Name, Last Name, Address, City, State or Postal Code. Select the column header to activate the sort. Click on it again to switch from Ascending to Descending Order.

+ Create New Client –

A search feature is also available on the My Clients page. Type a search term in the text box and all client records containing that search term will appear in the listing below. Clear the text box to clear the

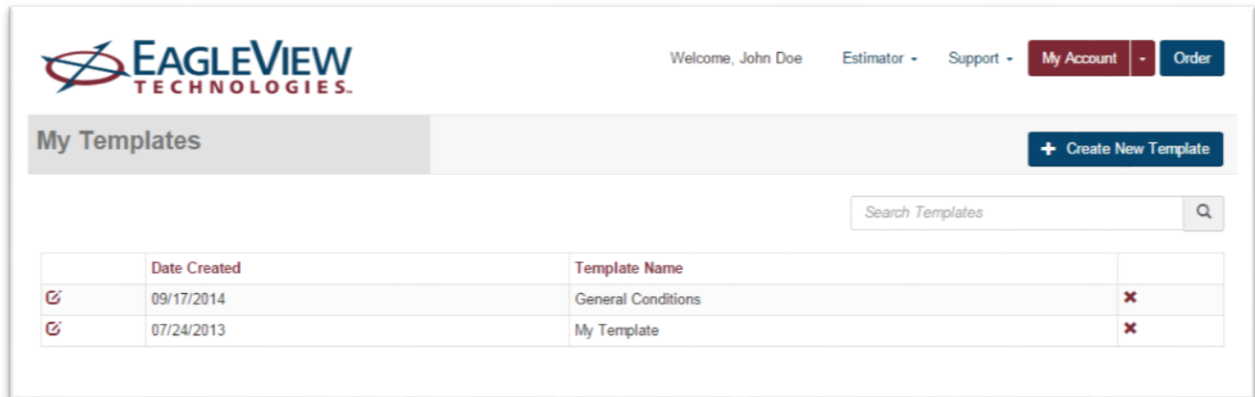
search.





Click this icon to open the client detail for the selected client.

Click this icon to delete the client. Note: If the client is associated with an estimate, the delete option is disabled.


My Templates


The My Templates link contains a listing of current templates stored in the system.




	Date Created	Template Name	
	09/17/2014	General Conditions	
	07/24/2013	My Template	

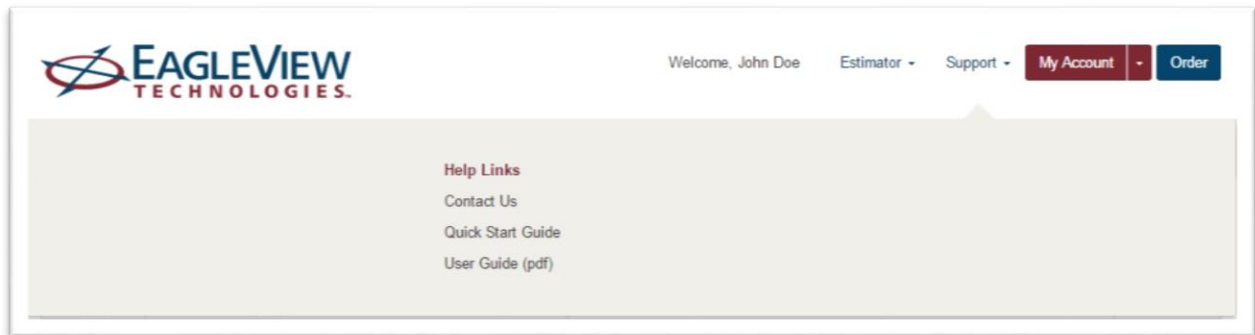
Sort by - Click and select **Name** or **Date** to sort the list alphabetically by name (A - Z or Z - A) or by date created (most recent to least recent or vice versa). If an option is clicked twice the sort order is reversed.

Search Box - Type the name of the list to search for and press **ENTER** or click . This feature can be helpful if when there are several pages of lists. Type the entire name or any part of it.

 **Open Template** – Click to open the Template details

 **Delete** – Click the row to delete a list

Support



Help Links

- Contact Us
- Quick Start Guide
- User Guide (pdf)

Contact Us

Link takes user to phone numbers and email to use to contact EagleView for help. This page also has links to additional help and training.

Quick Start Guide (.wmv)

Links to a video that gets new users started into the system.

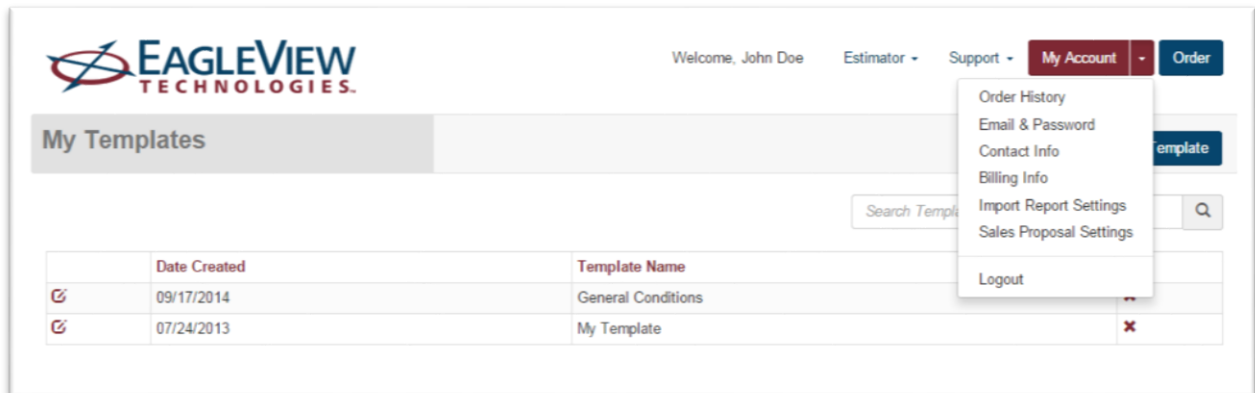
User Guide (pdf)

Links to a document that is available for download or printing.





My Account

Use the My Accounts menu to set up default application settings, such as default roofing materials, financial details for sales proposals, your company's contact information and your email and password settings.

To open this menu click **My Account** in the Navigation Bar.



The screenshot displays the EagleView Technologies web application interface. At the top left is the company logo. The top right navigation bar includes the text "Welcome, John Doe", "Estimator -", "Support -", "My Account -", and "Order". The "My Account" dropdown menu is open, listing the following options: "Order History", "Email & Password", "Contact Info", "Billing Info", "Import Report Settings", "Sales Proposal Settings", and "Logout". Below the navigation bar, the "My Templates" section is visible, featuring a search bar and a table of templates.

	Date Created	Template Name	
	09/17/2014	General Conditions	
	07/24/2013	My Template	

Order History

Manage your EagleView Measurement Reports and Estimates ordered through the EagleView website.

To open this page select the drop-down menu on My Account from the Main Navigation and select Order History.

Manage your reports and view your order history. You can also filter by report attributes, or export your list to Excel.

Filter By

From: To:

Claim #:

Report #:

Batch ID:

Status:

Cat ID:

Product Type:

[Filter](#)

Reports (1 - 17 of 17)

Report #	Date	Product Type	Address	Building ID	Claim #	Delivery	Cost	Status	Actions
9291547	08/20/2014	Estimate	1236 Parkwood Blvd, Schenectady		Claim9291547	Regular	\$0.00	Completed	Manage
9291546	08/20/2014	Premium	1236 Parkwood Blvd, Schenectady		Claim9291546	Regular	\$0.00	Completed	View Email
9277301	08/18/2014	Premium	2341 Fenwick Way, Virginia Beach			Regular	-	Created	
9277233	08/18/2014	Estimate	2525 220th St SE, Bothell			Regular	\$0.00	Completed	Manage
8721547	06/13/2014	Estimate	72 Greenhill Ct, Dallas			Regular	\$0.00	Completed	Manage
8721522	06/13/2014	Estimate	123 Main Street, Anytown			Regular	\$0.00	Completed	Manage
8048021	04/01/2014	Estimate	72 Greenhill Ct, Dallas			Regular	\$0.00	Completed	Manage
8048020	04/01/2014	Premium	72 Greenhill Ct, Dallas			Regular	\$0.00	Completed	Unavailable
8047260	04/01/2014	Estimate	123 Main Street, Any Town			Regular	\$0.00	Completed	Manage

Email and Password

The Email link contains Email and Password information. Here, you can choose to send reports to your Login Email or enter one or more email addresses to receive reports.

EAGLEVIEW TECHNOLOGIES **PICTOMETRY INTELLIGENT IMAGES** 1-866-659-8439 [Live Help](#) Search

Industries ▾ Products ▾ Support & Services ▾ Welcome John! My EagleView ▾ Order

Email & Password

[Back to Estimator](#)

Change your password and notification settings below.

✔ Your email and password settings have been changed.

Email Addresses

Login Email: johndoe@training.com Send my reports to this email address

Send my reports to: johndoe@training.com
(Email address where your reports will be delivered.)

Change your Password

Old Password:

New Password:
8 characters or more (case sensitive)

Retype New Password:

Email Notifications

Send me emails regarding new products and services from EagleView.

Cancel Save

Password information can also be updated from this page.

Contact Info

The Email link contains User Name and Address information. Here, you can update the information on your account and the information displayed on reports.

The screenshot shows the EagleView Pictometry user interface. At the top left is the logo for EagleView Technologies and Pictometry Intelligent Images. To the right of the logo is the phone number 1-866-659-8439 and a Live Help button. A search bar is located in the top right corner. Below the logo, there are navigation links for Industries, Products, and Support & Services. On the right side, there is a welcome message "Welcome John!", a "My EagleView" dropdown menu, and an "Order" button. The main heading is "Contact Information" in a large white font on a dark blue background. Below the heading is a link "Back to Estimator". The main content area contains the text "View and edit your contact information below." followed by a form titled "Contact Information". The form has the following fields: First Name (John), Last Name (Doe), Phone (866-555-1122) with an Ext. field, Secondary Phone with an Ext. field, Company (TrainMe, LLC), Department (987654321), Address (123 Main Street), City (Atlanta), State/Province (Georgia), and Zip/Postal Code (30303). At the bottom right of the form are "Cancel" and "Save" buttons.

EAGLEVIEW TECHNOLOGIES **PICTOMETRY**
INTELLIGENT IMAGES

1-866-659-8439 [Live Help](#) Search

Industries ▾ Products ▾ Support & Services ▾ Welcome John! My EagleView ▾ Order

Contact Information

[Back to Estimator](#)

View and edit your contact information below.

Contact Information

First Name:*	<input type="text" value="John"/>
Last Name:*	<input type="text" value="Doe"/>
Phone:*	<input type="text" value="866-555-1122"/> Ext: <input type="text"/>
Secondary Phone:	<input type="text" value="___-___-___"/> Ext: <input type="text"/>
Company:*	<input type="text" value="TrainMe, LLC"/>
Department:	<input type="text" value="987654321"/>
Address:*	<input type="text" value="123 Main Street"/>
	<input type="text"/>
City:*	<input type="text" value="Atlanta"/>
State/Province:*	<input type="text" value="Georgia"/>
Zip/Postal Code:*	<input type="text" value="30303"/>

Billing Info

The Billing link contains information on the payment information and billing address.

industries ▾ Products ▾ Support & Services ▾

Welcome John! My EagleView ▾ Order

Billing Information

My EagleView ▾ Billing Information

View and edit your billing information below.

Change Your Payment Information

First Name:

Last Name:

Card Type:

Card Number:

Expiration Date: /

Change Your Billing Address

Please verify the billing address matches the payment information.

Billing Email:

Phone: Ext:

Secondary Phone: Ext:

Company Name:

Address:

City:

State/Province:

Zip/Postal Code:

, click [Back to Estimator](#).

Import Report Settings Page

The import setting page allows the user the ability to set up template defaults for importing EagleView Reports

Line Item Type	Generic Material List Item
Demolition	-none-
Extra Stories	-none-
Steep Charge	-none-
Shingles	Composite - 25 Yr - 3 Tab
Ridge Vent	Continuous
Underlayment	15 # Felt
Hip Shingles	Composite - 25 Year - 3 Tab
Step Flashing	Metal Stepped Flashing
Drip Edge	Aluminum Drip Edge
IWS – Eave	Single Layer
IWS – Rake	Single Layer
IWS – Valley	Single Layer
Valley Metal	W-Style Metal
Ridge Shingles	Composite - 25 Year - 3 Tab
Straight Flashing	Metal
Parapet Coping	Coping Cap

Components on this page

Good – Click this tab to select the materials to be assigned to each generic materials item for good-quality roofing materials.

Better – Click this tab to select the materials to be assigned to each generic materials item for better-quality roofing materials.

Best– Click this tab to select the materials to be assigned to each generic materials item for best-quality roofing materials.

Save – Click to save changes.

Sales Proposal Page

Use the Sales Proposal page to enter the default financial details to be used when creating sales proposals. (These are defaults only; details can be changed when creating sales proposals.)

To open this page click on the My Account in the Main Navigation and select Sales Proposal Settings.

Setting	Value	Unit
Profit	10.00	%
Overhead	10.00	%
Add Labor	\$ 0.00	
Add Labor	0.00	%
Labor Tax	0.00	%
Material Tax	0.00	%
Other Fee	\$ 0.00	

Components on this page

Profit – Type the percentage of profit desired for proposals

Overhead – Type an overhead percentage

Add Labor (\$) – If the preference is to charge a flat amount for labor, type the dollar amount

Add Labor (%) – If the preference is to charge for labor as a percentage of materials cost, type the percentage.

Labor Tax – Type the Labor Tax rate (a percentage) if the state requires this or if the desire is to add a labor tax rate to the proposal. This is not a common tax.

Material Tax – Type the sales tax rate (a percentage) applicable to jobs.

Other Fee – Type the dollar amount of any other fees that are desired in the proposal, such as a dumpster fee or other miscellaneous fees not included in the cost of materials or labor.

Save – Click to save changes.

Logout

The Email link contains Email and Password information. Here, reports can be sent to the account Login Email or one or more email addresses can be entered to receive reports.

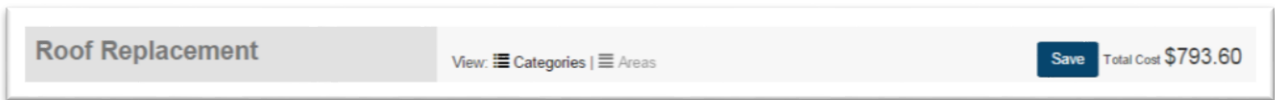
Order

Order



Takes users to the EagleView Order Manager where users can order EagleView Measurement Reports

Estimating

Page Title Bar



Name – Displays the name of the active estimate of the page

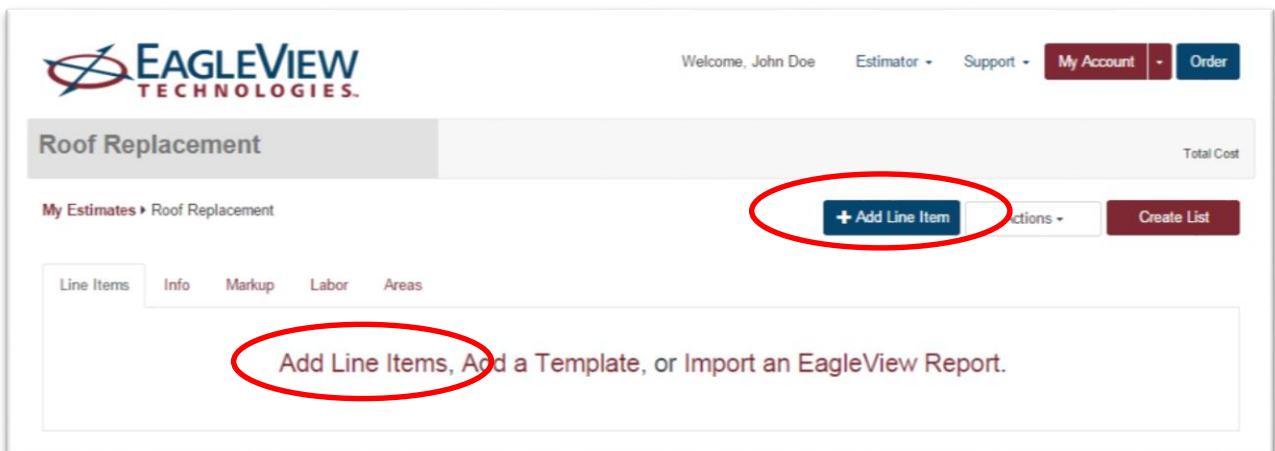
View –  Categories line items are sorted by Category first and then Area or  Areas line items are sorted by Area first and then Category

Save – Button is displayed only when there are unsaved changes in the work area. Clicking on the button saves all changes from the estimate.

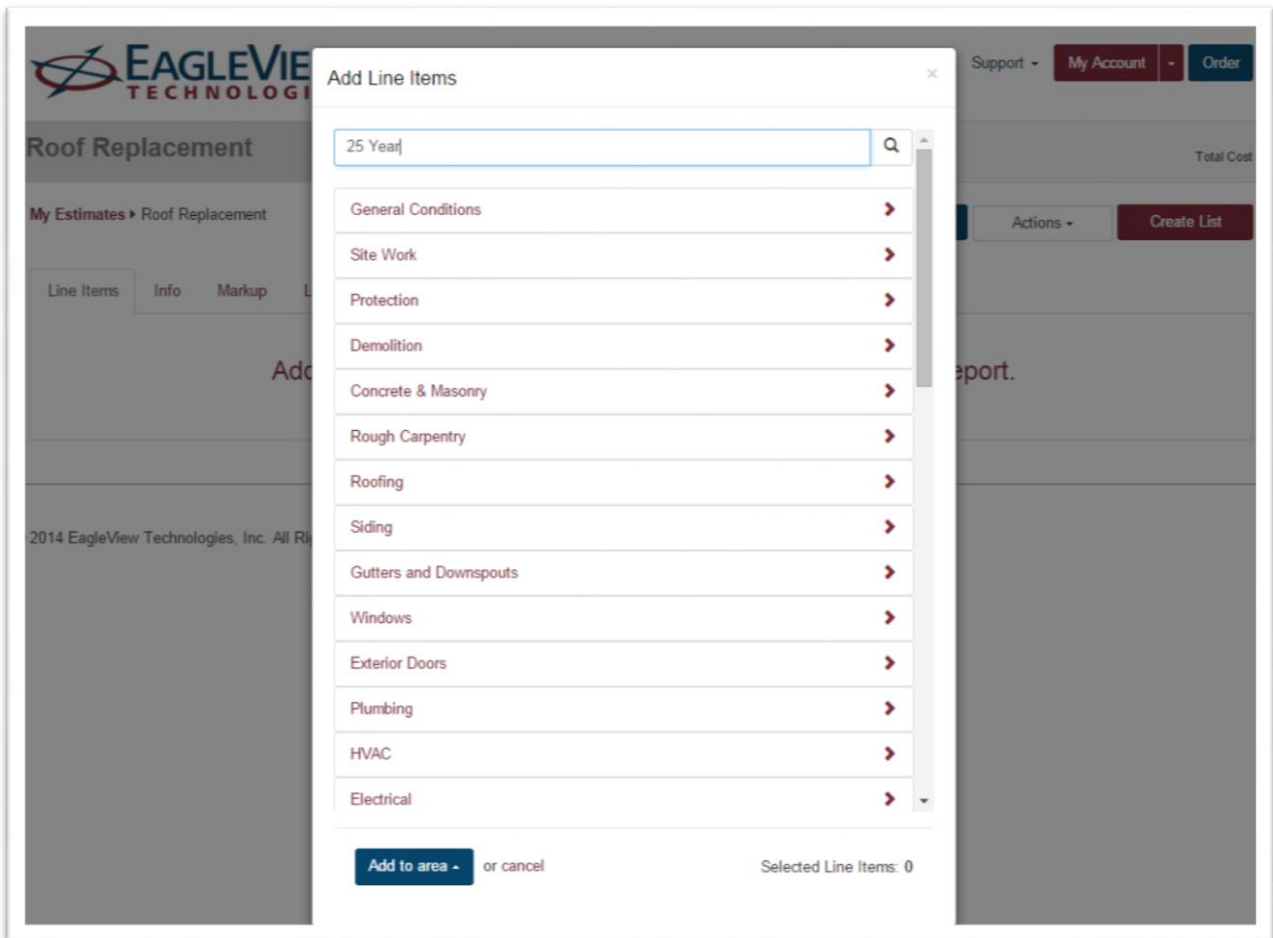
Total Cost – Sum of the costs on the Estimate Work Area. *Note: This is costs only and does not include any **Markups***

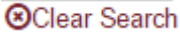
Building an Estimate

Add line items



– Clicking on the link or the button will bring up the list of over 8000 construction line items.



To search for a specific line item, type keywords into the text box located at the top of the dialog and click Search. All line items containing the keyword will appear in their respective categories. Click  to clear the search.

Expand the categories by clicking on the chevron to the right of the category or subcategory

Select lines items by clicking on the checkbox to the left of the description. The line items display the UOM that the pricing and description is based on.

Add Line Items [Close]

25 Year [Search] [Clear Search]

Roofing > Composite Roofing - Labor and Materials

< Back

- [SQ] Supply & Install 3-Tab 25 Year Shingles - 3 Bdl / Sq
- [LF] Supply & Install 3-Tab 25 Year Hip Cap Shingles
- [LF] Supply & Install 3-Tab 25 Year Ridge Cap Shingles
- [LF] Supply & Install Woven 3-Tab 25 Year Shingles in the Valley
- [LF] Supply & Install 25 Year California Cut Shingles in the Valley

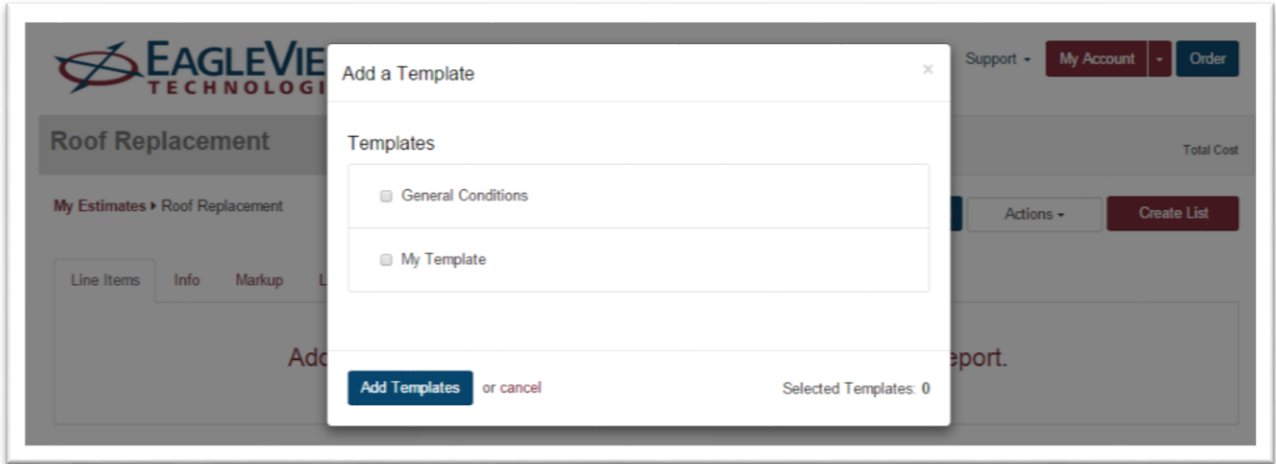
Add to area - or cancel Selected Line Items: 0

The bottom of the dialog displays the number of lines selected to be added to the estimates.

From this page an Area must be selected for the estimate.

Add a Template

Templates are an easy way to add a prepopulated list of line items at one time. The line items are all added with a quantity of zero.



Click on the Add Template link opens up a dialog box that lists the templates that are saved in the user account. These templates are also available in the main navigation under Estimator.

Select a template by clicking on the checkbox to the left of the template name. Multiple templates can be added at one time.

Add Templates

This button will close the dialog and open the Line Items of the Estimate with the new line items being displayed.

Import an EagleView Report

EagleView Technologies roof measurement reports include the roof measurements needed to estimate and order materials for roofing projects. You can order an EagleView report from the EagleView website (<http://thd.eagleview.com/>).

Once the roof measurement report is received, note the report number. The report number is needed to import the EagleView report in the PQR application.



The screenshot shows the EagleView Technologies website interface. At the top left is the logo for EagleView Technologies. To the right of the logo, there is a user greeting 'Welcome, John Doe', a navigation menu with 'Estimator' and 'Support' (both with dropdown arrows), and two buttons: 'My Account' (with a dropdown arrow) and 'Order'. Below the navigation is the main heading 'Import an EagleView Report'. Underneath this heading is a label 'EagleView Report Number' followed by a text input field containing the number '9291546'. To the right of the input field is a blue button labeled 'Get Report'.

When importing an EagleView report, the Estimator application calculates the quantities for the line items and cost of the materials needed for the roofing project and builds a materials list with the quantities and costs of the materials selected.

Click on the Link to open the Import an EagleView Report Wizard. Enter the Measurement Report Number and click on Get Report.

EAGLEVIEW TECHNOLOGIES. Welcome, John Doe Estimator Support My Account Order

Import an EagleView Report

EagleView Report Number
9291546 **Get Report**

We found your report!
← View Notes Diagram for this report.
(cancel)

Quality:
 Good
 Better
 Best

Line Item Type:
 Combined Labor & Material
 Separate Labor & Material

	Import EagleView Report Attributes	Select SKU
Shingles	Composite - 25 Yr - 3 Tab	Link
Ridge Vent	Continuous	Link
Underlayment	15 # Felt	Link
Hip Shingles	Composite - 25 Year - 3 Tab	Link
Step Flashing	Metal Stepped Flashing	Link
Drip Edge	Aluminum Drip Edge	Link
IWS - Eave	Single Layer	Link
IWS - Rake	Single Layer	Link
IWS - Valley	Single Layer	Link
Valley Metal	W-Style Metal	Link
Ridge Shingles	Composite - 25 Year - 3 Tab	Link
Straight Flashing	Metal	Link
Parapet Coping	Coping Cap	Link

Next

Selections for the estimate are set on this screen. When the selections are complete, the Next button will open the Line Item screen with new line items that have quantities that are generated from the EagleView Report.

1011 Main Street-2
(Change)

List Total \$0.00

Estimate: 1011 Main Street-2 ▸ List: 1011 Main Street-2

+Add Line

Actions ▾

Create Quote

Search your list...



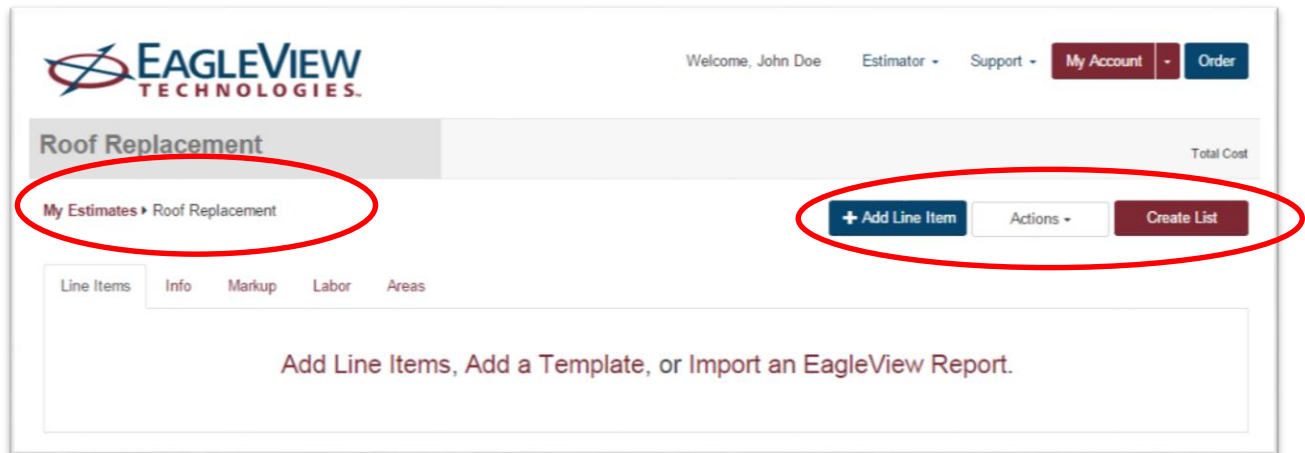
<input checked="" type="checkbox"/>	Description	SKU	Category	Unit Price	UoM	Qty	Item Total	Delete
<input checked="" type="checkbox"/>	15# Felt Underlayment - 432 SF	SKU#	Category	0.00	ROL	5	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	25 Year Shingles - 3 Bdl/Sq	SKU#	Category	0.00	BDL	54	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	D Style Galvanized Steel Drip Edge - 1l	SKU#	Category	0.00	EA	30	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ice and Water Shield - 1.5 Square Roll	SKU#	Category	0.00	ROL	9	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ridge/Hip Cap Shingles - 30 LF	SKU#	Category	0.00	BX	3	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Rolled Metal Flashing - 50 Ft Roll	SKU#	Category	0.00	LF	2	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Roof Louver Vent	SKU#	Category	0.00	EA	1	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	25 Year 3-Tab Shingles - 3 Bdl/Sq	SKU#	Roofing	0.00	BDL	151	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ridge Vent - 20 Ft	SKU#	Roofing	0.00	EA	7	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	15# Felt Underlayment - 432 SF	SKU#	Roofing	0.00	ROL	9	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	4, 8 and 12 Inch Step Flashing	SKU#	Roofing	0.00	EA	142	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Aluminum Drip Edge - 10 Ft Piece	SKU#	Roofing	0.00	EA	41	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Ice and Water Shield - 225 SF	SKU#	Roofing	0.00	ROL	7	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Galvanized Steel W Valley Flashing - 2'	SKU#	Roofing	0.00	EA	8	\$0.00	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Domer Flashing - 10 Foot	SKU#	Roofing	0.00	EA	150	\$0.00	<input checked="" type="checkbox"/>

+Add Line

List Total \$0.00

Create Quote

Estimate Action Menu



Navigation – [My Estimates > Roof Replacement](#)

clicking on the line [My Estimates](#) will close the estimate and open the My Estimates page

+ Add Line Item –

Button opens the Add Line Items dialog described earlier

Action –

Links to actions used to build the estimate

[Add Template](#) – Opens the template dialog described earlier

[Save As](#) – Save the active estimate with a new name

[Export](#) – Export the estimate details to a .csv file to be used for analysis and uploading into other programs

[Import an EagleView Report](#) – Uses EagleView Measurement Reports for creating the estimate. This has been described earlier

[Reports](#) – Create customer reports based on the active estimate

Proposal

Contract

Create List –

Opens the PQR module and displays material items.

Estimate Work Area

EagleView Technologies logo and navigation: Welcome, John Doe, Estimator, Support, My Account, Order.

Roof Replacement Total Cost

My Estimates > Roof Replacement + Add Line Item Actions Create List

Line Items Info Markup Labor Areas

Line Items

EagleView Technologies logo and navigation: Welcome, John Doe, Estimator, Support, My Account, Order.

Roof Replacement View: Categories | Areas Save Total Cost \$1,510.19

My Estimates > Roof Replacement + Add Line Item Actions Create List

Line Items Info Markup Labor Areas

Qty	UOM	Description	Unit Cost	Extended	O&P	Notes
11.00	SQ	Supply & Install 3-Tab 25 Year Shingles - 3 Bdls / Sq	\$137.29	\$1,510.19	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Quantity: 10.00 SQ
Waste Factor: 10.00 %
Adjusted Quantity: 11.00 SQ

You have set the default Waste Factor for this item to 10.00%. Clear default

When line items are added to an estimate, the following fields should be completed and/or reviewed:

Quantity – The amount of the line item needed to complete the project based on the Unit provided by the system.

Waste % – The waste factor for the line item selected.

Adjusted Quantity – The total of the Quantity entered or automatically generated from the EagleView Report Import adjusted with the waste factor. This is the number that will be used to calculate costs and material amounts.

UOM – The unit of measure for each line item is based on the type of line item. Units are program generated and cannot be changed.

Description – The description for the line item selected. Descriptions can be edited as needed. **Note:** *Changes to line item descriptions are not saved for future estimates unless the 'Save As' option is chosen.*

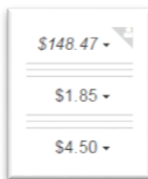
Unit Cost – Line item system costs generally include both material and labor amounts per unit. These are costs and do not include markups. Markups are applied when creating a proposal. If the system cost is zero, it typically means that no costs have been established for that line item. Along with the **Average** cost, which is generated by the system, there is **My Cost** pricing as well. Here is how pricing is defined:

Labor: Through third party surveys, government publications, and user input each company is given projected labor rates in their area. These rates should be reviewed and updated to meet your specific needs. The rates published are intended to be used as guidelines only. Each line item takes the user's labor rate and multiplies it by a labor factor that is determined by third party surveys, user input and industry standards.

Materials: Material costs are based on pricing local building material suppliers as well as using third party surveys, industry standards and user input to determine amount and quantity of materials to be used. This material pricing is an average price and should be used as a guideline only. The user should use "My Cost" to keep track of their own costs on a job.

The system gives users the guidelines to get started quickly, but becomes more accurate and customized to each user by using the My Cost feature available on all line items. Once a My Cost is entered into the system, the system saves that value and makes it available for all future estimates.

My Cost is specific to the company set up in the system. When **My Cost** has been entered it will appear for that line item only. To save a **My Cost** as a company default check the box on the bottom of the dialog box "Save My Cost as line item default." Once a default is set, this cost will show up each time that line item is entered into an estimate. When selected by the radio button on the top of the dialog **My Cost** always overrides the read-only **Average** costs.






Line items using **My Cost** are designated with the corner image

Extended cost is calculated by multiplying the quantity times the unit cost **Average** or **My Cost**.

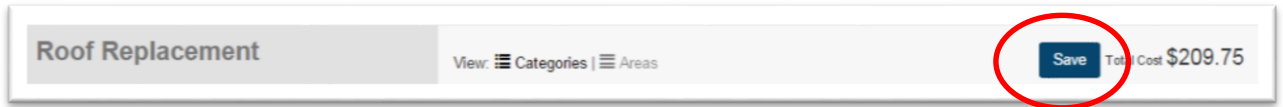
Note: *The estimate is calculated at cost, meaning no overhead or profit markups have calculated yet. Mark ups are applied when the proposal is created.*

O&P – indicates whether Overhead & Profit markup calculations should be done on this line item. Click the column heading to add/remove O&P from every line item or click each individual line to customize O&P calculations.

Notes – Notes can be added to each line item. These notes will appear in the Proposal and Contract to the client. The  will change to a  when notes have been entered for that line item. Notes can be set as a default for the line item by clicking Save note as line item default in the lower left corner of the Notes dialog box.

Delete – Line items can be deleted by selecting the . When a line is deleted, it is immediately deleted and cannot be undeleted. If a line is deleted by mistake, simply add that line back in.

Save – To save line item changes, click the Save button displayed in the page title bar



This icon will only display when line items have been modified in the estimate.

Info

View or edit the site and contact information for the active estimate by clicking on the Info tab to the right of the Line Item tab.

The screenshot displays the EagleView Technologies interface for editing estimate information. The page title is 'Roof Replacement'. The user is logged in as 'John Doe' and is in the 'Estimator' role. The 'Info' tab is selected, showing the following fields:

Estimate Info		Site Info	
Estimate Number	98320	Address 1	72 Greenhill Ct
Estimate Name	Roof Replacement	Address 2	Address 2
Estimate Status	Estimating	City	Dallas
Client Name	Brown, Toby	State	Georgia
	Create new client	Postal Code	30157

Estimate Number – System-generated number

Estimate Name – Unique name that is required for each estimate. Estimate Name or description will display on proposals and job reports.

Estimate Status – This is a drop-down menu that defines stages of the current estimate. Estimates in a 'No Job' or 'Completed' status will be archived.

Client Name – Select an existing client from the drop-down menu or create a new client using the link below the drop-down menu.

Address – Enter job site address information

Postal Code - This is a required field and is used to determine the store location and pricing on the estimate.

Phone – Clicking on the drop-down menu gives the option of adding Work, Home, Cellular and Fax numbers.

Email – Entering an email address is for reference only

Clicking the button will save the estimate information.

Markups

Access the Estimate Markup dialog box from within the estimate by clicking Markup from the Estimate submenu.

The screenshot shows the 'Markup' tab of the Estimate Markup dialog box. It features several input fields for different markup types, a 'Company Default' column with checkboxes, and a 'Markup Grid' on the right side.

Markup Type	Value	Unit	Company Default
Profit*	20.00	%	<input checked="" type="checkbox"/>
Overhead*	10.00	%	<input checked="" type="checkbox"/>
Labor Tax	0.00	%	<input checked="" type="checkbox"/>
Material Tax	7.00	%	<input type="checkbox"/>
Overall Tax	0.00	%	<input checked="" type="checkbox"/>
City/Municipal Tax	0.00	%	<input checked="" type="checkbox"/>
Other Fee	\$ 150.00		<input checked="" type="checkbox"/>
Other Fee	0.00	%	<input checked="" type="checkbox"/>

Markup	Gross Profit
20%	16.67%
25%	20.00%
30%	23.08%
35%	25.93%
40%	28.57%
45%	31.03%
50%	33.33%
55%	35.48%
60%	37.50%
100%	50.00%
200%	66.67%

Profit % - This is the percent of profit added to each line item on the project. There is a markup grid on this screen to show you what the gross profit on a job would be based on the Profit %.

Overhead % - This is the percent of overhead to add to each line item on the project.

Labor Tax % - This is the tax that is paid by the contractor as a part of doing business. This is added to the labor in the estimate and displays in the proposal and contract amounts. This is not a common tax in most locations and is rarely used. Overhead and Profit are added to this tax.

Material Tax % - This is the tax that is paid by the contractor as a part of doing business. This is added to the material costs in the estimate and displays in the proposal and contract amounts. This should be based on the amount of tax paid to the material supplier. Overhead and Profit are added to this tax.

Overall Tax % - This tax is added at the end of the Proposal and is a tax collected by the contractor and paid directly to the state. Overhead and Profit is not added to this tax.

City/Municipal Tax % - This tax is similar to the Overall Tax, but is collected by the contractor and paid directly to the City or Municipality. Overhead and Profit is not added to this tax.

Other Fee \$ - This is a flat fee that is included in the overall proposal subtotal. Overhead and Profit is not added to this fee.

Other Fee % - This is a percentage of the overall cost of the project after Labor and Material Taxes are added. Overhead and Profit is not added to this fee.

Note: Make the markup details entered here your company default by placing a checkmark in the Company Default column.

Labor Rates

Line Items
Info
Markup
Labor
Areas

Important: Changes do not affect existing line items in this estimate.

				Set As Default	Company Default	System Default
General Conditions	\$	48.43	per hour	<input type="checkbox"/>	\$54.42	\$54.42
Site Work	\$	46.01	per hour	<input type="checkbox"/>	\$51.70	\$51.70
Protection	\$	40.33	per hour	<input type="checkbox"/>	\$45.32	\$45.32
Demolition	\$	40.33	per hour	<input type="checkbox"/>	\$45.32	\$45.32
Concrete & Masonry	\$	45.57	per hour	<input type="checkbox"/>	\$51.20	\$51.20
Rough Carpentry	\$	45.17	per hour	<input type="checkbox"/>	\$50.75	\$50.75
Roofing	\$	50.00	per hour	<input checked="" type="checkbox"/>	\$50.00	\$54.19
Siding	\$	47.58	per hour	<input type="checkbox"/>	\$53.46	\$53.46

Labor rates by construction category are edited at the estimate level. An existing estimate will need to be open before Labor Rates can be adjusted.


Changes to any of these fields will only impact the currently open estimate.

To update company default labor rates, place a check mark in the corresponding company default box. Company defaults set here will only affect future estimates and will not change any other current projects.

The Company and System Defaults are included for reference only.

Company Default – Labor rate set for active account only

System Default – Through third party surveys, government publications, and user input we give each company projected labor rates in their area.

When complete, click  in the title bar. A successful save notification will record the changes.

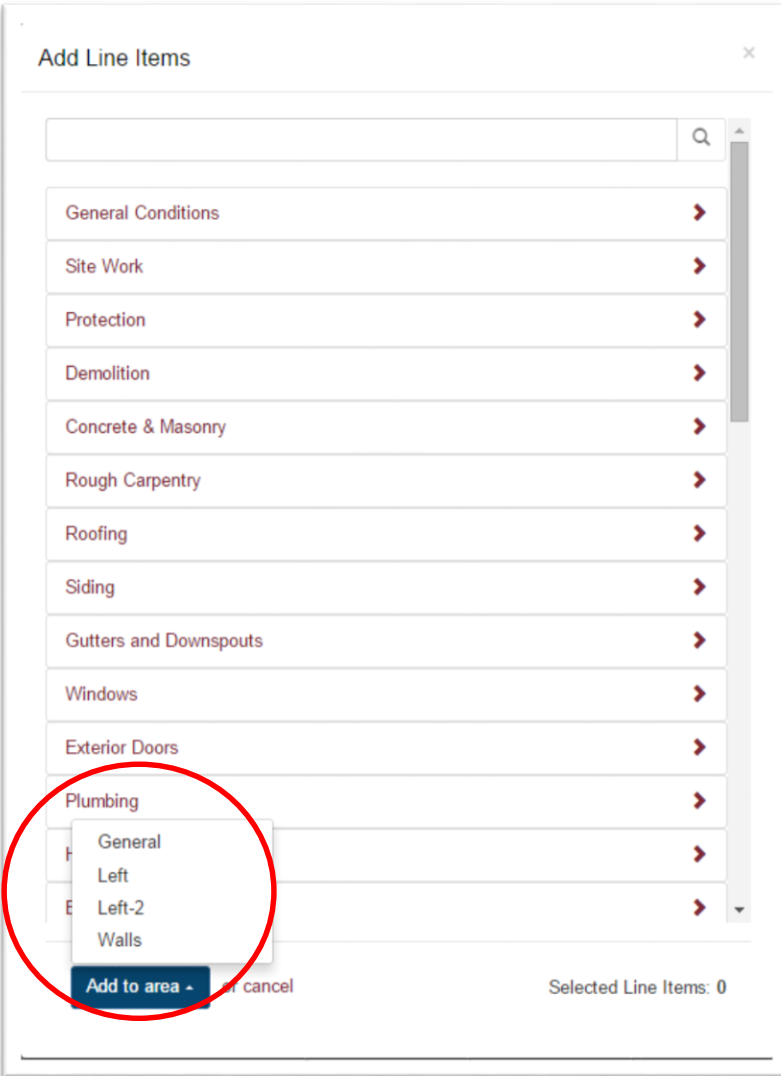
Areas

Create/Edit an Area

The program has the ability to create estimates by areas or rooms. When in an estimate, click on the Areas tab.

	Name	Notes	
	General	System Generated Area	+
i	Left		x
i	Left-2		x
i	Walls		x

Click on the + at the top right of the work area. A new line opens up with two empty text boxes. The system requires a unique area name per estimate. Type in the name of the area you wish to add and any supporting notes. When complete, move the cursor to the upper right corner of the dialog box and click on Save in the page title bar. This will add an area to the estimate. Repeat the process to add more areas to an estimate. Click back on the Line Items tab to return to the Estimate Work Area.

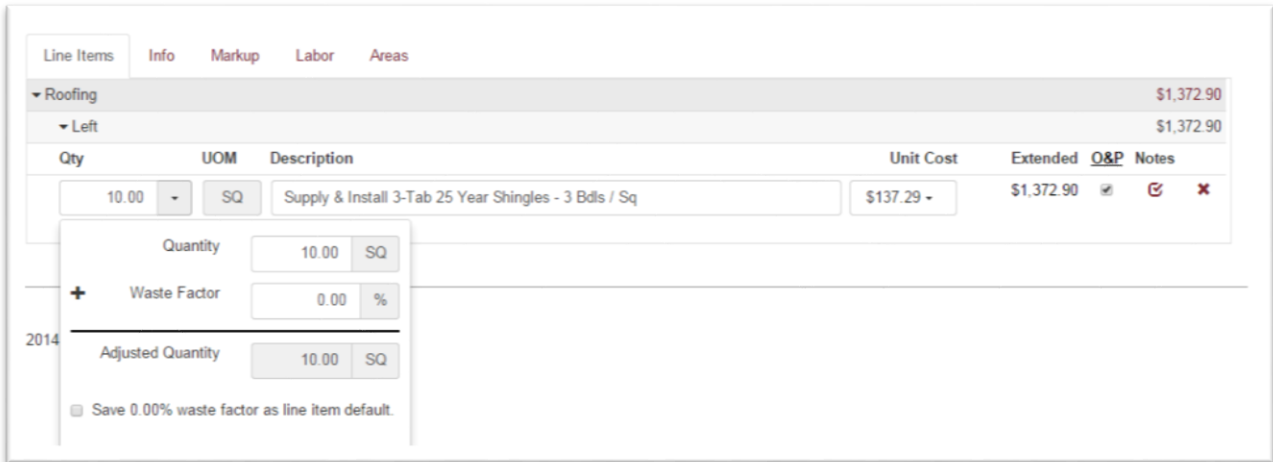


Line items can now be added by area. To add a line item by area, click on the +Add Line Item button and select line items. When complete move the cursor to the bottom left of the Add Line Items dialog box Click on the Add to area. A list of the areas will display. Select from that list and when the line items are added into the estimate they will be added to the selected area.

Editing a line item

Update quantity

Quantity is used to calculate the Extended cost of the line item and is used to determine the amount of materials required for the estimate.

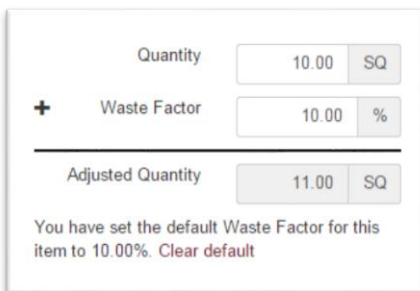


Quantity – Select the text box and simply enter a quantity for the line item.

Waste Factor – To enter a waste factor click on the down arrow to expand the quantity dialog. Enter a percent of waste that is desired.

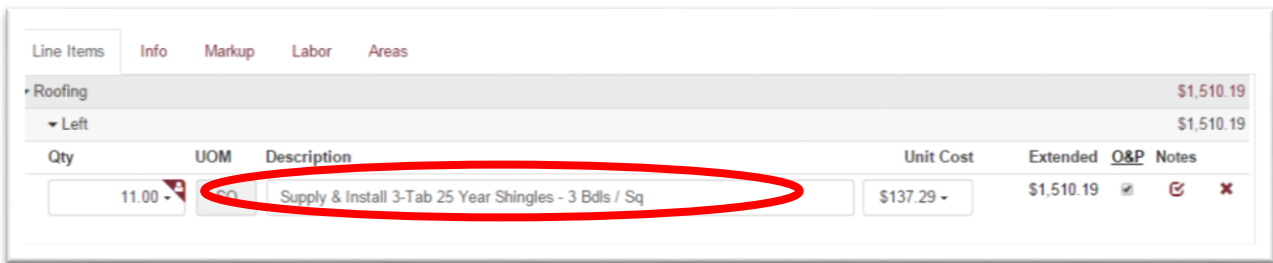
Adjusted Quantity – When a waste factor is entered on a line item, the quantity is adjusted by that amount. The adjusted quantity will be used to calculate extended costs and the amount of materials on the PQR.

Default – To set a company default for this line item, click on the check box on the bottom of the dialog box. For every line item that has a default set, the system remembers the waste factor each time the line is added to a future estimate.



To clear the default click on the **Clear default**.

Edit line item descriptions

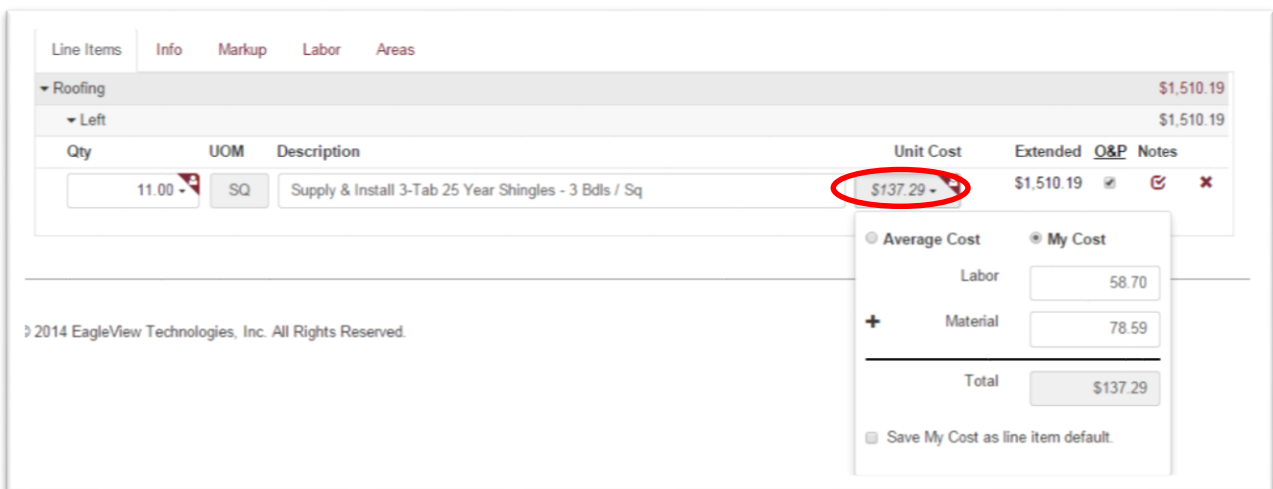


Qty	UOM	Description	Unit Cost	Extended	O&P	Notes
11.00	SQ	Supply & Install 3-Tab 25 Year Shingles - 3 Bdls / Sq	\$137.29	\$1,510.19		

To edit line item descriptions, open the estimate work area and select the description that needs to be edited. Place the cursor in the description box to make the desired edits. To save the changes click on the Save button in the page title bars.

Update line item costs

To customize line item costs, click on the expand category icon and open the category work area. Move the cursor to the 'My Cost' column and click on the drop-down text box.



Qty	UOM	Description	Unit Cost	Extended	O&P	Notes
11.00	SQ	Supply & Install 3-Tab 25 Year Shingles - 3 Bdls / Sq	\$137.29	\$1,510.19		

Average Cost My Cost

Labor

+ Material

Total

Save My Cost as line item default.

Expanding the drop-down will open a dialog box with Labor and Material breakdown of system average costs or costs you have previously entered. Enter or update your own labor and/or material costs and click. Clicking off of the dialog box will close the box.

The type of line item determines which boxes you can enter amounts into. A line item that is a "Supply Only" will not allow you to enter an amount in the labor box. The amounts entered here will be multiplied by the Adjusted Quantity to calculate extended costs.

When you enter costs in the My Cost dialog box, the My Cost values override the system average cost for this estimate.

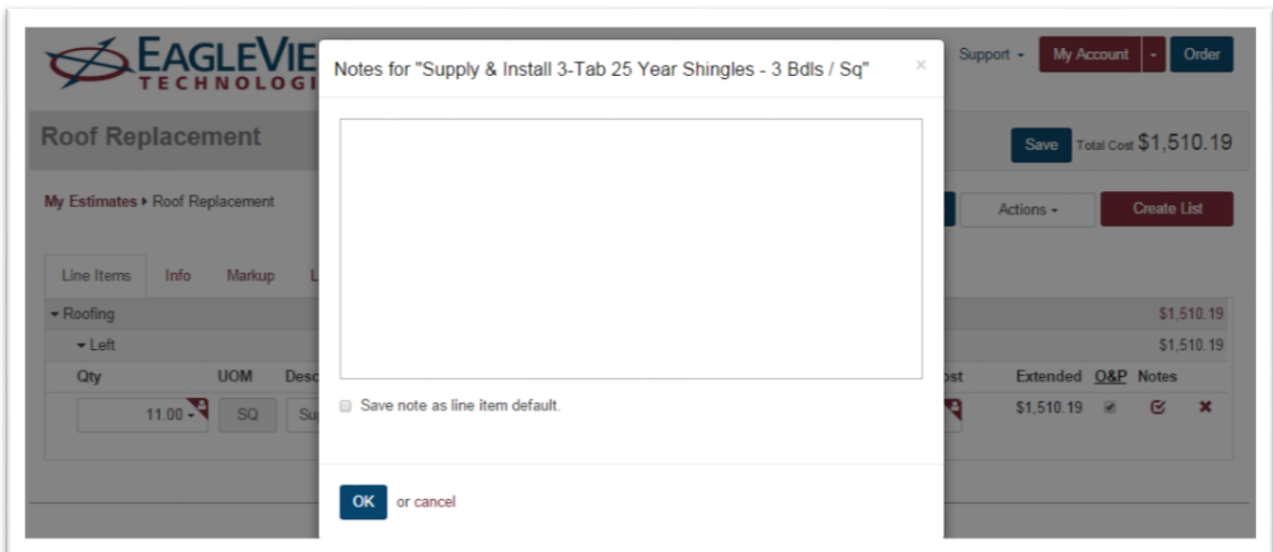
To set this as the company default, select the check box at the bottom of the dialog box. The next time you add this line item to an estimate, your My Cost values will display. You will always have access to the current average cost, but it is not used in the calculated costs for the estimate unless the radio button is selected.



The screenshot shows a dialog box with a header bar containing two cost values: '\$137.29' with a minus sign and a red flag icon, and '\$1,510.19' with a checkmark and a red flag icon. Below the header, there are two radio buttons: 'Average Cost' (unselected) and 'My Cost' (selected). Under 'My Cost', there are two input fields: 'Labor' with the value '58.70' and 'Material' with the value '78.59'. A plus sign is to the left of the 'Material' label. A horizontal line separates these from a 'Total' field which shows '\$137.29'. At the bottom, a message reads: 'You have set the default My Cost for this item to \$58.70 for Labor and \$78.59 for Materials. Clear defaults'.

To clear the default click on [Clear default](#).

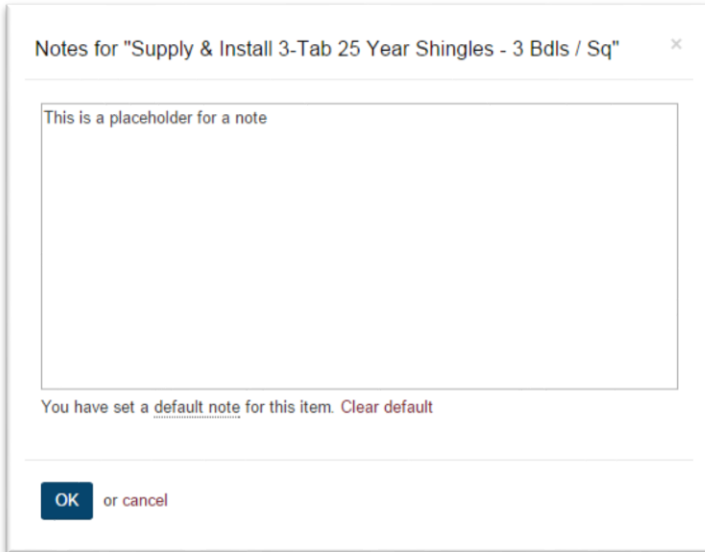
Even though the system comes pre-loaded with average costs by area, the application is designed to enter your own costs. This ensures estimates are completely accurate and detailed estimates can be created with confidence.

Add notes to my Estimate



To add notes to an estimating line item, click on the expand category icon to open the estimating work area. Move the cursor to the right side of the line and click on the  in the Notes column. This will open the Notes dialog box. Add any notes and when finished, move the cursor to the lower left corner of the dialog box and click .


Default notes can be created for a line item by selecting the checkbox at the bottom of the dialog. If the default option is selected, these notes will be attached to this line item for future estimates.



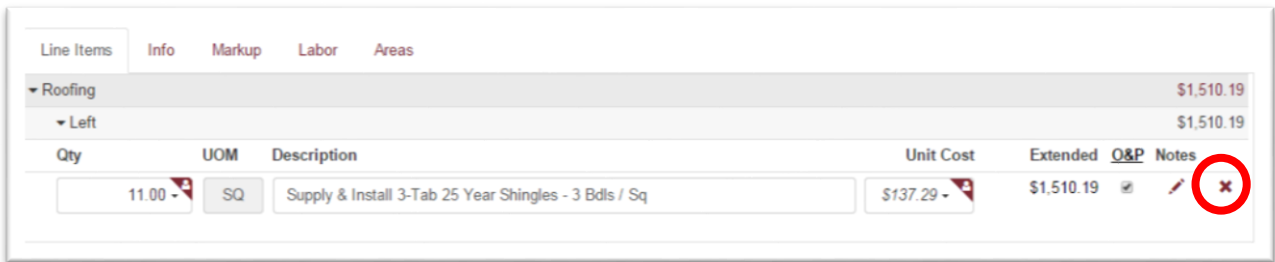
To clear the default click on the


Clear default

Hovering over the default note link will expand the entire default note.

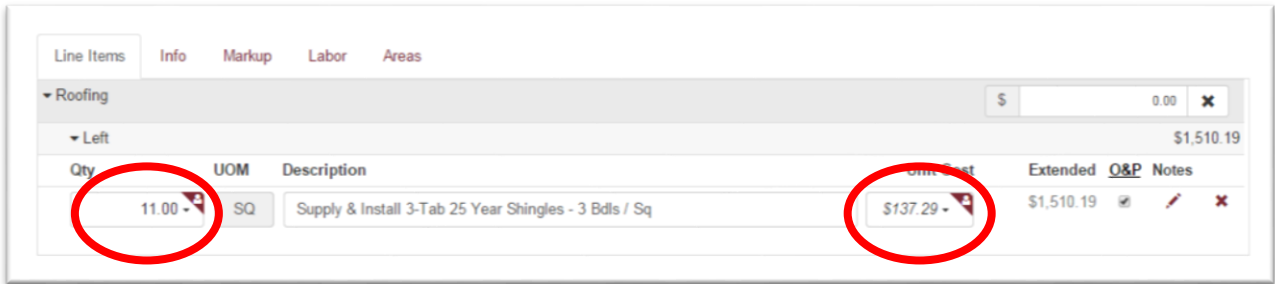
Please note that when there is information contained in the notes section, the notes icon turns into a . Notes will appear on Proposal and Contract reports.

Delete line items



To delete a line item, click on the expand category icon to open the estimating work area. Move the cursor to the far right side of the work area and click on the  that corresponds to that line. When a line is deleted, it is immediately deleted and cannot be undeleted. If a line is deleted by mistake, simply add that line back in.

Override Extended Costs

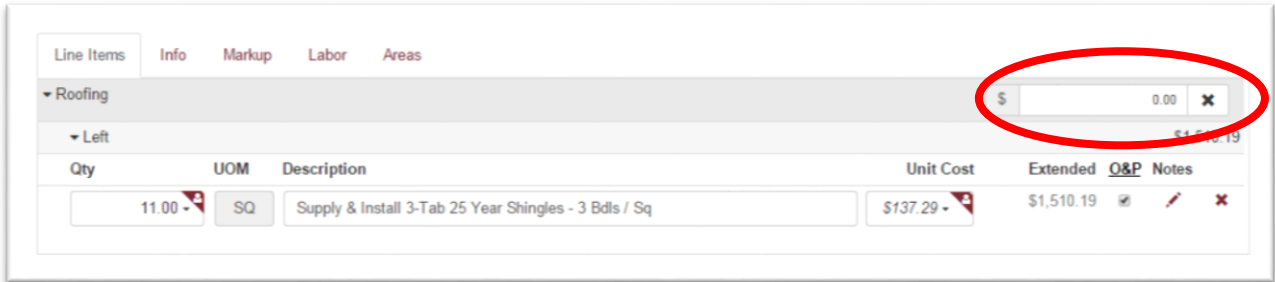


Line Items	Info	Markup	Labor	Areas		
▼ Roofing						
▼ Left						
Qty	UOM	Description	My Cost	Extended	O&P	Notes
11.00	SQ	Supply & Install 3-Tab 25 Year Shingles - 3 Bds / Sq	\$137.29	\$1,510.19		

To override extended costs for a line item, click on the expand category icon to open the estimating work area. Move the cursor to either quantity or My Cost. Changing one or both of those values will change the extended cost for that line item. When done, click on the **Save** button in the page title bar.

Override Category Cost

To override the costs for an entire category click on the text box for category total. An editable text box is displayed. The amount entered in this textbox will update the total costs on the estimate.

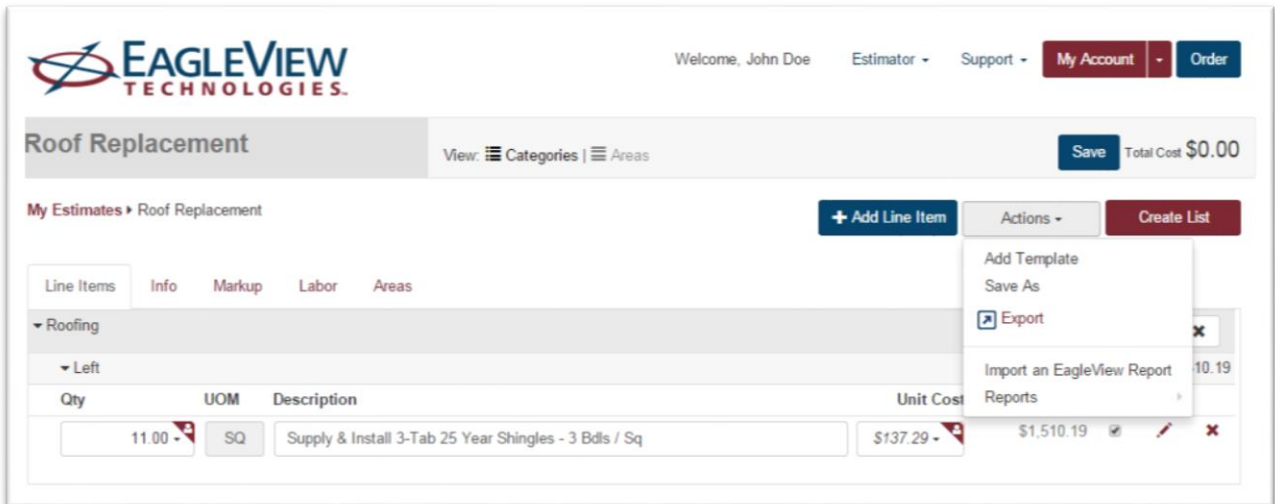


If the category is overwritten the detail costs of the line items the category will be ignored.

Markups are always added to the amount of the overwritten category totals.

Note: If a category has been overwritten the Area View will be disabled.

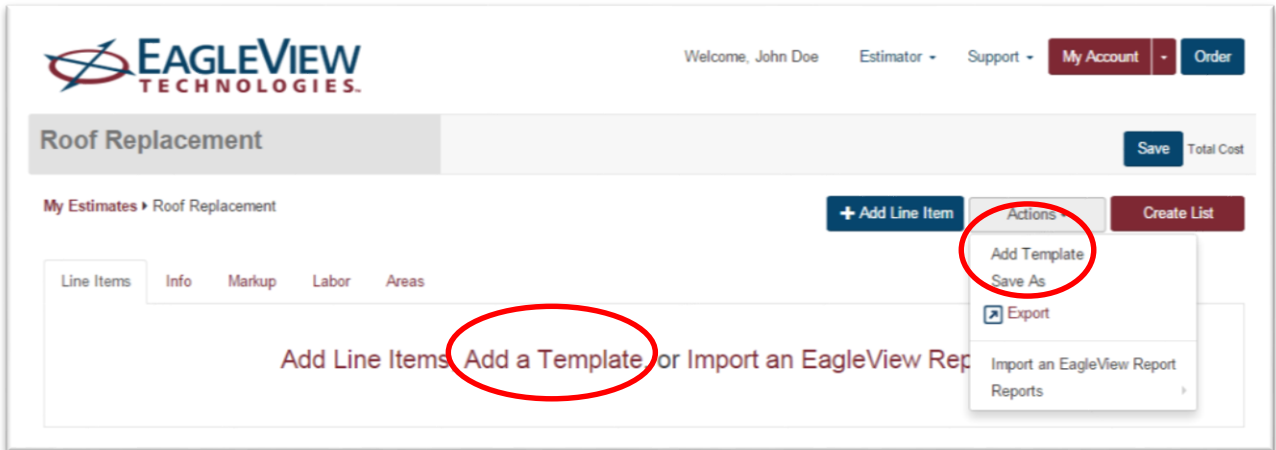
Actions Menu



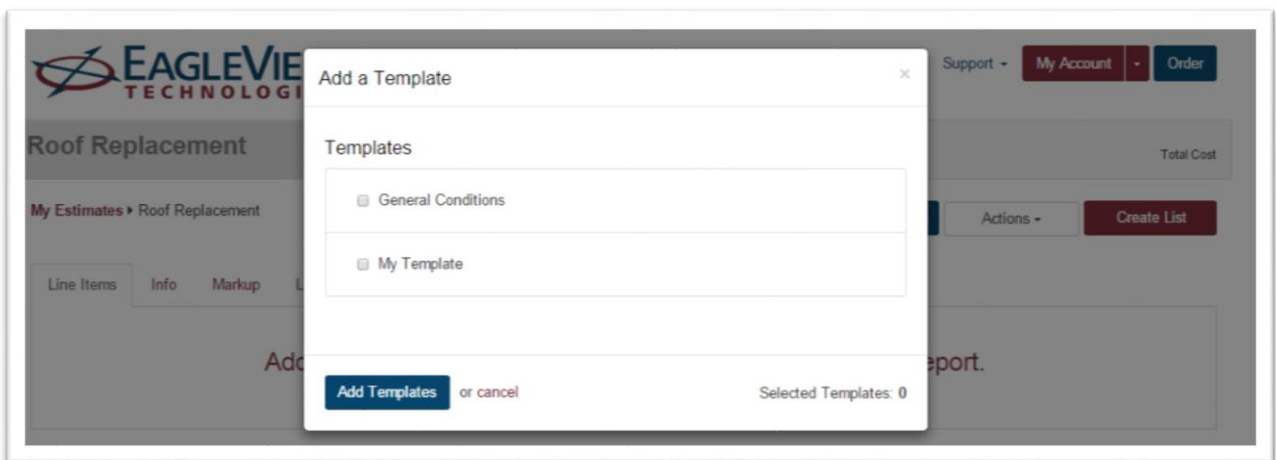
Add a Template

Add a Template to an Estimate

To add a template, open an existing estimate or create a new estimate. From the estimating work area, select Add Template from the links on an empty estimate or by clicking on the Add Template link in the Actions Menu. A dialog box containing a listing of all templates will open.



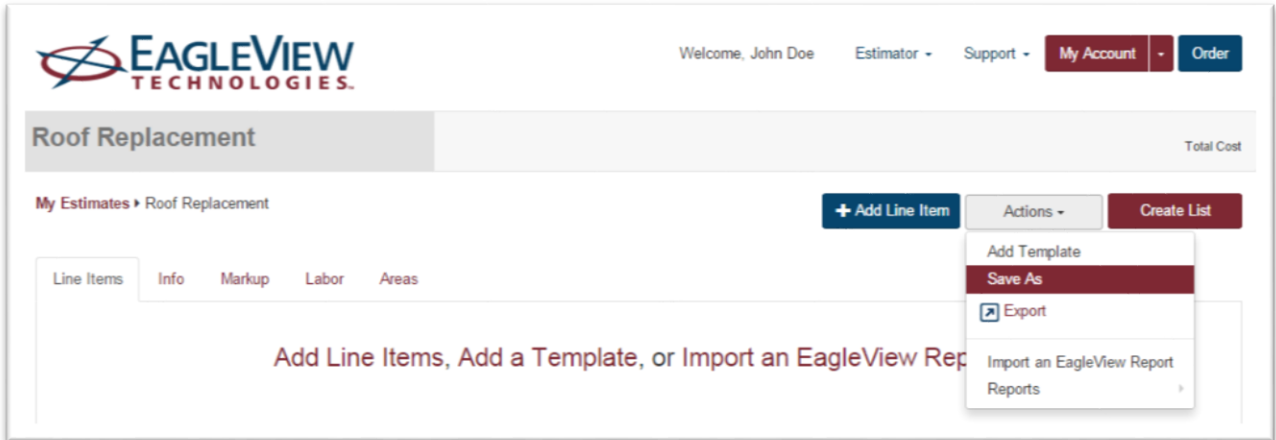
Choose a template to add to this estimate and click Add Templates button on the bottom left of the Add a Template dialog box. The line items added to the template will now appear in the open estimate. You may add multiple templates to one estimate. More than one template can be added at the same time.



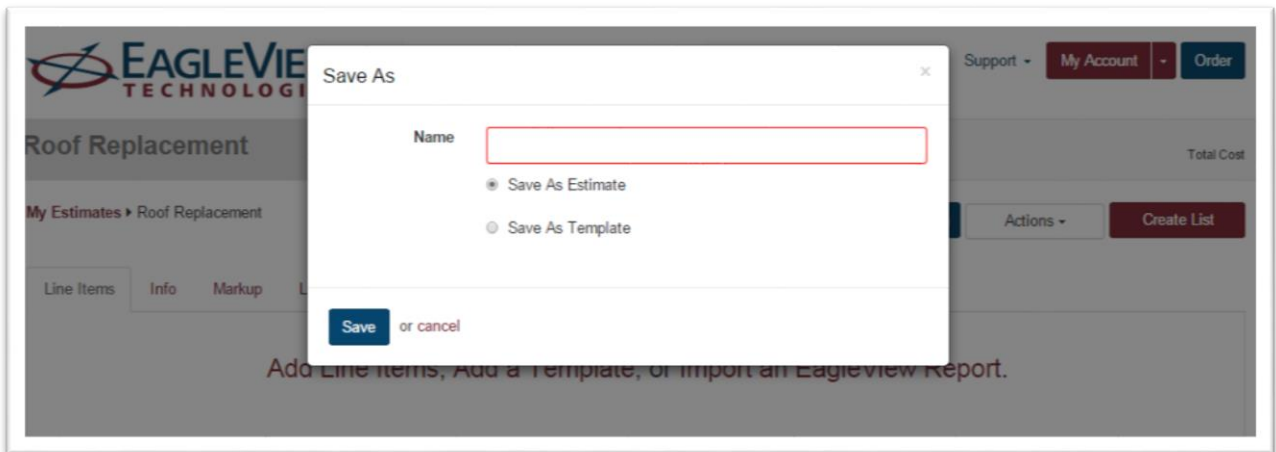
When a template is added into an estimate, My Cost and Average costs will update to reflect the most current costs. All Line Item Descriptions, waste factors and notes will also be added on the Template Line Items.

Save As

The program has the ability to save an exact copy of an estimate or to create templates, further streamlining the estimate process. The Save As function (located in the Actions Menu) allows you to choose between saving the current estimate as a copy or a template.



While in an estimate, click Save As from the Action Menu. A dialog box will appear, requiring a name to be entered and a choice between Save As Estimate or Save As Template. When done, click on the **Save** button on the bottom left of the Save As dialog box.



The Save As Estimate option will create an exact copy of the current estimate, including all cost information and open the new copied estimate in the estimate work area.

The Save As Template option will create a template using the line items added into this estimate and add that template to the Templates listing. The template will not contain cost information and will update to current costs when added to an estimate. See the section below for more information about creating templates and adding templates to an estimate.

Export



Export the cost details of the estimate by clicking on the Export link under the Action Menu. The export is created in a .csv file and can be uploaded into an Excel document.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Area	Category	Qty	Waste	AdjQty	Uom	Description	MyCost	Labor	LaborTax	Material	MaterialTax	ExtendedWithoutTax	ExtendedWithTax	Hours	CategoryOverride
General	Roofing	192.55			LF	Supply & Install Ice & Water Shield per Code at the Eave (36 Inch Wide)	Yes	240.69		385.1	19.26	625.79	645.04	3.88	N/A
General	Roofing	208.47			LF	Supply & Install Ice & Water Shield per Code at the Rake (36 Inch Wide)		154.27		160.52	8.03	314.79	322.82	2.49	N/A
General	Roofing	76			LF	Supply & Install Ice & Water Shield per Code in the Valley (36 Inch Wide)		56.24		58.52	2.93	114.76	117.69	0.91	N/A
General	Roofing	34.63			SQ	Supply & Install #15 Felt Paper over Roof Decking		553.73		129.86	6.49	683.6	690.09	8.93	N/A
General	Roofing	48.94			SQ	Supply & Install 3-Tab 25 Year Shingles - 3 Blds / Sq		3561.85		3704.27	185.21	7266.12	7451.34	57.45	N/A
General	Roofing	134.32			LF	Supply & Install 3-Tab 25 Year Ridge Cap Shingles		147.75		100.74	5.04	248.49	253.53	2.38	N/A
General	Roofing	76			LF	Supply & Install (w) Style Painted Galvanized Steel Flashing in the Valleys		174.04		167.96	8.4	342	350.4	2.81	N/A
General	Roofing	15			LF	Supply & install Straight Mechanical Counter Flashing		25.05		1393.35	69.67	1418.4	1488.07	0.4	N/A
General	Roofing	70.5			LF	Supply & install Stepped Mechanical Counter Flashing		117.74		64.16	3.21	181.89	185.1	1.9	N/A
General	Roofing	134.32			LF	Supply & Install a Continuous Ridge Vent		53.73		322.37	16.12	376.1	392.21	0.87	N/A
Siding	Siding	1200			SF	Supply & Install TYVEK® or Equivalent Wall Covering		204		288	14.4	492	506.4	3.82	N/A
Siding	Siding	60			LF	Supply & Install Mid-Story Flashing		228.6		96.6	4.83	325.2	330.03	4.28	N/A

Reports

Create a Report

To access and create reports, an estimate must be open. Please remember that all estimates are done at cost. At cost means there are no Markups applied while working in the estimate work area. Markups and other fees are applied when creating reports such as sales proposals and contracts.

To create a report, open the Action Menu and select Reports. Select from Proposal or Contract and then select type of report required.

The screenshot displays the EagleView Technologies software interface for a 'Roof Replacement' estimate. The top navigation bar includes the company logo, user name 'John Doe', and links for 'Estimator', 'Support', 'My Account', and 'Order'. The main header shows the estimate title 'Roof Replacement', a 'View' menu for 'Categories' and 'Areas', and a 'Save' button next to a 'Total Cost' of '\$14,451.21'. Below this, there's a section for 'My Estimates' with a '+ Add Line Item' button and an 'Actions' menu. The 'Actions' menu is open, showing options like 'Add Template', 'Save As', 'Export', 'Import an EagleView Report', and 'Reports'. The 'Reports' menu is further expanded to show 'Proposal' and 'Contract' options, with sub-options for 'With Totals Only', 'With Line Item Totals', and 'Summary Only'. The main content area shows a table of line items with columns for 'Qty', 'UOM', 'Description', and 'Unit Cost'. The table contains three items: 'Provide Building Permits & Plan Review' (Qty: 20.00, UOM: EA, Unit Cost: \$200.00), 'Daily Job Management' (Qty: 10.00, UOM: DAY, Unit Cost: \$72.65), and 'Project Start Conference' (Qty: 1.00, UOM: EA, Unit Cost: \$193.73).

Remember that reports are created dynamically and reflect what has been saved in the estimating work area.

A preview page of the estimate opens and from this preview the header and footer information can be edited. The system allows text to be copied and pasted or edited inline.

EAGLEVIEW TECHNOLOGIES. Welcome, John Doe Estimator - Support - My Account - Order

Export Email Close Report

H1 H2 H3 H4 H5 H6 P B I U [List Bullets] [List Squares] [List Circles] [List Triangles] [List Diamonds] [List Stars]

TrainMe, LLC
 123 Main Street , Atlanta, GA 30303
 Phone: (866) 555-1122
 Email: johndoe@training.com

Proposal

Date: 11/12/2014 Job Name: Roof Replacement Site Address: 72 Greenhill Ct
 Client: Toby Brown Job #: 98320 Dallas, GA 30157

Area: General			
General Conditions			\$8,907.30
Qty	Unit	Description	Price
20.00	EA	Provide Building Permits & Plan Review	\$5,564.00
10.00	DAY	Daily Job Management	\$944.45
1.00	EA	Project Start Conference	\$251.85
16.00	HR	Daily Setup & Job Site Clean Up	\$1,007.34
1.00	EA	Install Lockbox & Signage	\$22.75
3.00	EA	10 Yard Dumpster	\$1,116.90
Area: Walls			
Siding			\$10,555.58

Export and Print a Report

EAGLEVIEW TECHNOLOGIES. Welcome, John Doe Estimator - Support - My Account - Order

Export Email Close Report

Reports must be exported to the local computer before they can be printed. From the preview page click on the Export link on the top left of the page.

Once editing is complete choose to Export the report into a Word document where additional editing can be completed. This will either open a download dialog box from the local machine or automatically render the report in the format selected. Proceed to either save or print the report.

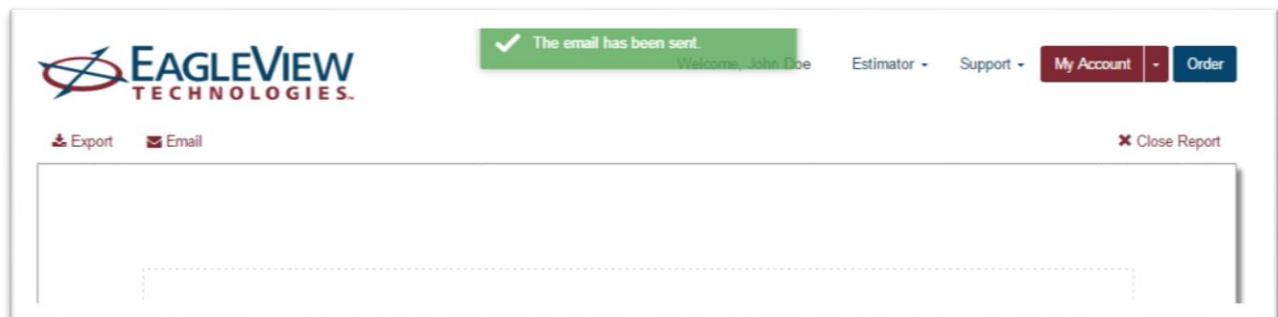
Close the preview page by clicking on the X Close Report link at the top right of the page. The preview page will close and the Line Item work area reopens.

Note: The edits and changes made on this page are not retained in the system. Save the report to the hard drive to retain this information.

Email a Report

From the preview page click on the Email link on the top left side of the page. This sends an email with an attached Word document to the email address in the account's Contact Information.

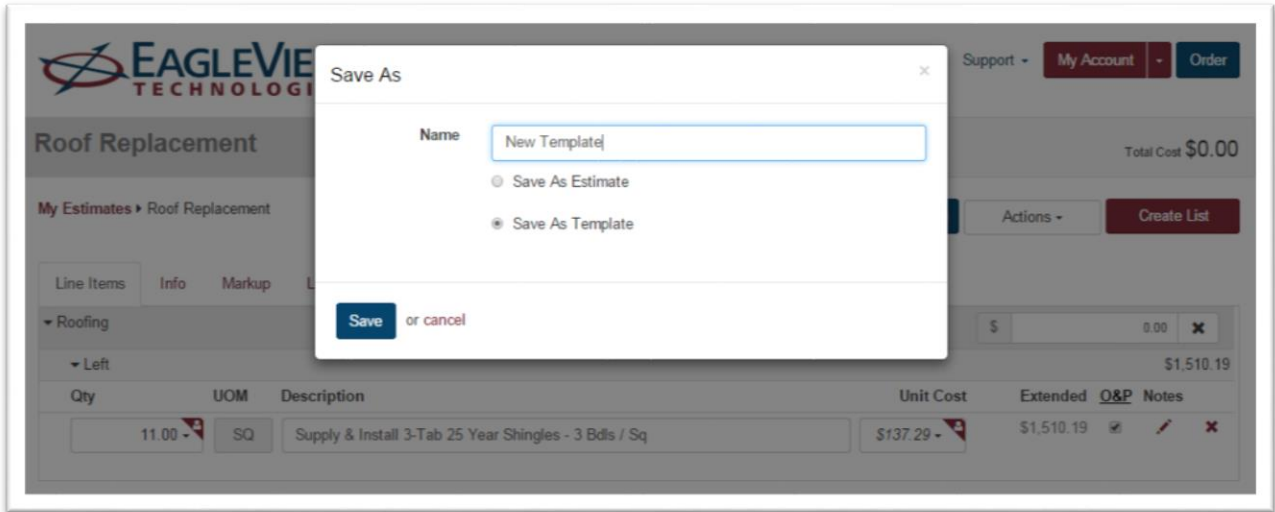
A green message indicating the email was successfully sent will appear.



The email will be sent to the email address used to subscribe to the application. To change that email address, click on the My Account menu in the main navigation and select Contact Info. A new page opens up and the email address can be changed.

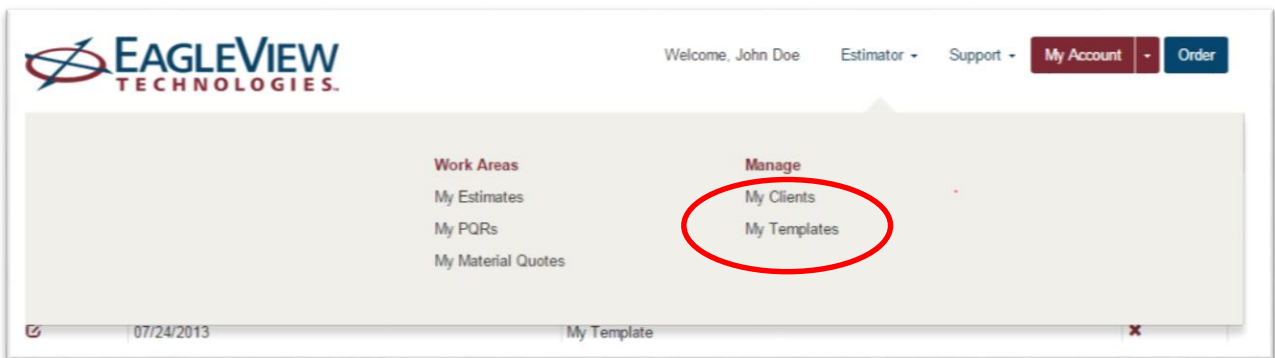
Create a Template

The program has the ability to create templates to streamline the estimate process. To create a template, follow the same steps as creating an estimate. Once line items have been added, click Save As from the Action Menu.

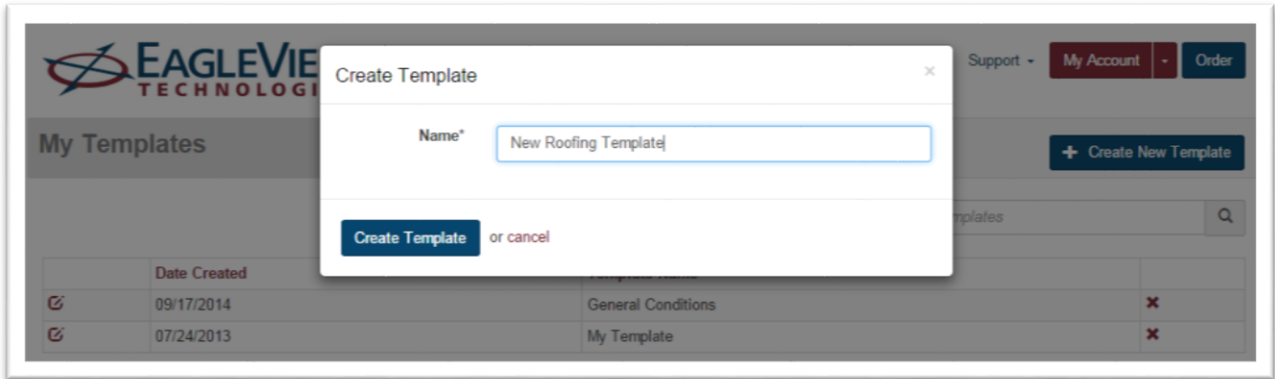


A dialog box requiring a Name will appear. Assign a name for this template and choose the option to Save As Template. This template has now been created and can be used in building future estimates.

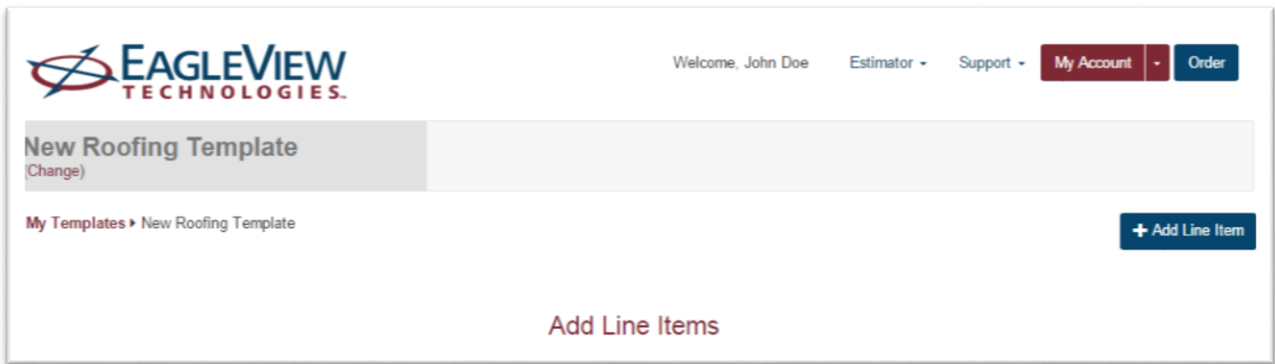
Templates can also be created directly from the My Templates page located on the Estimator Menu in the main navigation.



Click on the +Create New Template button on the page title bar. The Create Template dialog box will open up. A unique name is required to create a template. When done, click on the Create Template button on the bottom left of the Create Template dialog.



Add line items to the new template by using the +Add Line Item button or the Add Line Items link. These actions will open up the Add Line Items dialog described earlier.



Editing a Template

Templates can be edited by adding additional lines, deleting lines, adding notes, updating line item descriptions and waste factors. Changes made to the template will be applied to new estimates only.


Roofing				
General				
Uom	Description	Waste	Notes	
SQ	Tear off Existing Single Layer Roofing Down to Roof Decking & Dry In	0.00 %		
SQ	Supply & Install #15 Felt Paper over Roof Decking	0.00 %		
SQ	Supply & Install 3-Tab 25 Year Shingles - 3 Bdls / Sq	10.00 %		
LF	Supply & Install a Continuous Ridge Vent	0.00 %		

Add Line Items – Add lines by clicking on the +Add Line Item button underneath the page title bar. The Add Line Item dialog will open up. The template defaults to the General Category.

Update Description – Move the cursor to the Description text box and type in new text

Waste – Add waste percent in the template and it will be automatically added to the line item when you add a template to an estimate.

Notes – Add notes to the template. Notes will be added to the line items when the template is added to the estimate. Notes from templates will overwrite company default notes.

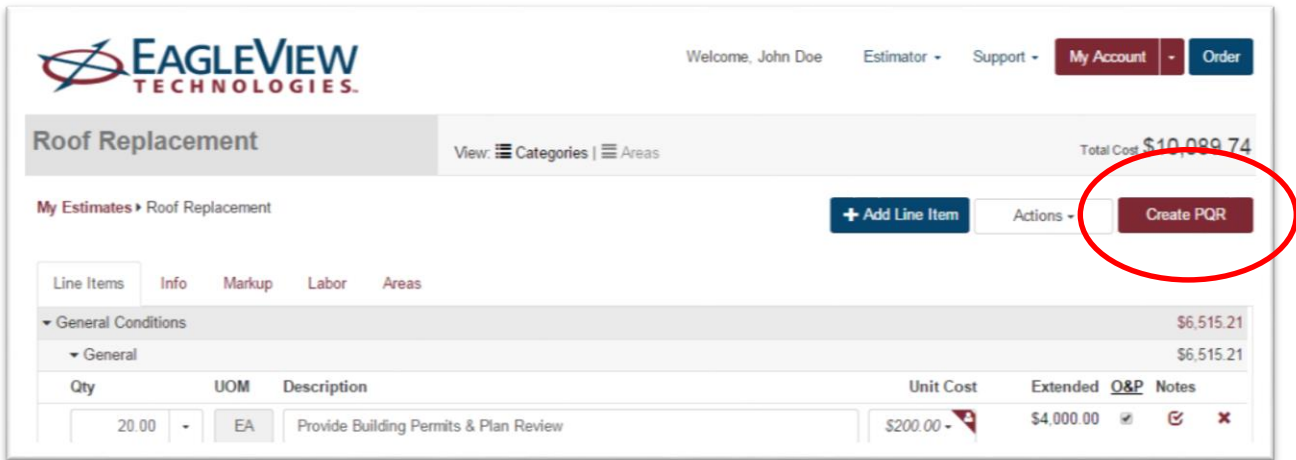
Delete – Line items can be deleted by selecting the . When a line is deleted, it is immediately deleted and cannot be undeleted. If a line is deleted by mistake, simply add that line back in.

Save – To save line item changes, click the Save button displayed in the page title bar

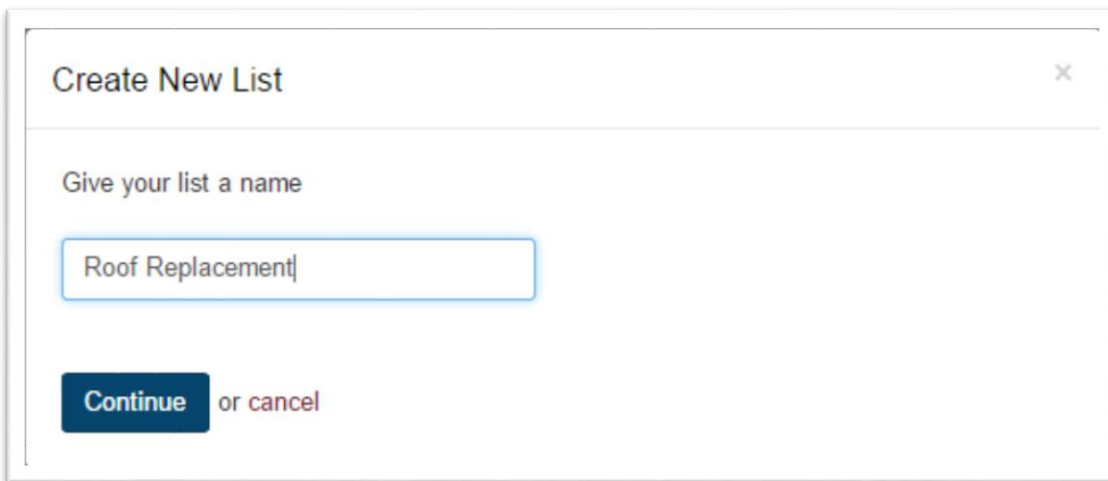
PQR (Material Quote Request)

Create a PQR from an estimate

To create a PQR or material quote request which is a list of material that will be required based on the estimate line items. While in an estimate, click on the Create PQR button in the sub navigation.



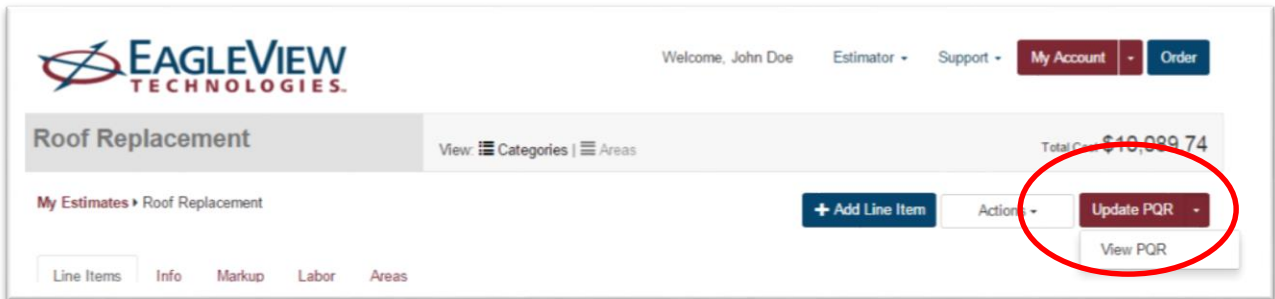
A dialog box opens asking for a list name. It defaults to the name of the estimate. Click on Continue to open up the PQR Detail Page.



Update PQR/View PQR

The PQR reads from the line items in the estimate at the time the PQR is viewed. Users can update their PQR with changes from the Estimate by clicking on the Update PQR button. The PQR detail page will open up and Material Items and quantities will be updated based on the estimate. Materials added to the PQR that were added outside the Estimate will be retained in the list.

A PQR can be viewed without updating data from the estimate by clicking on the drop-down tied to the Update PQR button. Selecting View PQR will open the PQR Detail page in the latest PQR view without updating with new Estimate Details.



PQR Detail Page

The PQR Detail page shows the materials you added from the estimate. You'll do most of your work on the PQR Detail page.

To open this page, click on the Estimator on the Main Navigation and select My PQRs or by clicking on the Create PQR, Update PQR, View PQR buttons on the Estimate Detail Page

From the My PQR page, click the name (the maroon link) of the PQR list to be opened. The PQR Detail page will open.

The active list (the one you're currently working with)

The total value of the list

Actions List

Drag-and-drop icon

	Description	SKU	Category	Unit Price	UoM	Qty	Item Total	Delete
1	15# Felt Underlayment - 432 SF	SKU#	Roofing	0.00	ROL	3	\$0.00	X
1	Ice and Water Shield - 225 SF	SKU#	Roofing	0.00	ROL	4	\$0.00	X
1	25 Year	SKU#	Roofing	0.00	BDL	40	\$0.00	X
1	Galvanized Steel W Valley Flashing - 2	SKU#	Roofing	0.00	EA	5	\$0.00	X
1	Dormer Flashing - 10 Foot	SKU#	Roofing	0.00	EA	2	\$0.00	X
1	Ridge Vent - 20 Ft	SKU#	Roofing	0.00	EA	2	\$0.00	X
1	4.5 Inch Lead Pipe Jack	SKU#	Roofing	0.00	EA	3	\$0.00	X
1	Lockbox & Signage	SKU#	General Conditions	0.00	EA	1	\$0.00	X
1	10 Yard Dumpster	SKU#	General Conditions	0.00	EA	3	\$0.00	X

List Total \$0.00

Components on this page

Change (under the list name) – Click to change the name of the list.

Save – Appears only after selecting or clearing a checkbox or changing something in the list (such as the quantity or category text)

Note: Click to save the changes (When changing a field on this page, the TAB key may have to be pressed for the Save button to appear.)


Actions list - A drop-down list that contains several options for working with the active list. For example, you can quickly add materials by using the links for Import a list, Import an EagleView report or create a sales proposal that includes the materials selected on this page.

+ Add Line – Click to open a blank row to add an item to the material list by entering its information. Enter a material description, a SKU, a category, a unit of measure, a quantity and a price to the list.


NOTE: This button appears at both the top and bottom of the page.

Create Quote - Click to create a report that can be exported or emailed to a supplier

NOTE: This button appears at both the top and bottom of the page.

Search box - To search for a material in this list by material description, type the text to search for and press **ENTER** or click . The application will display any materials with descriptions containing the text entered in the search box. This is a quick way to find materials in a very long list. Type any words that might be in a material description.

Clear Search - *Appears only after starting to enter search terms in the Search box.* Click this link to clear the search terms and navigate back to the last page displayed before the search was started..

Drag-and-drop icon  - Drag up or down to re-order the items in the list. Moving a row's drag-and-drop icon moves only that row's item.

Check Box - Click the check box on the column headings row to select the check boxes for all items in the list. Click the check box on an individual row to select that material. (Although the check box doesn't have a label, you might think of it as the "Select All" check box.) Click **Save** to save your selections.

Important: *The Select All check box (in the column heading row) selects all items in the list, even those that have been previously filtered out. (For more information about filtering a list, see "Filtering and sorting a list by category" on page 50.)*

When creating a quote, a sales proposal or viewing reports, only selected materials will be included in the order, proposal or reports.

SKU – The material's description and SKU number.

Category – Click the mouse in this field to change the category text for an item. Click this column heading to filter the list by category text.

Unit Price - The material's price per unit. The maximum value that can be entered is 99999.99.

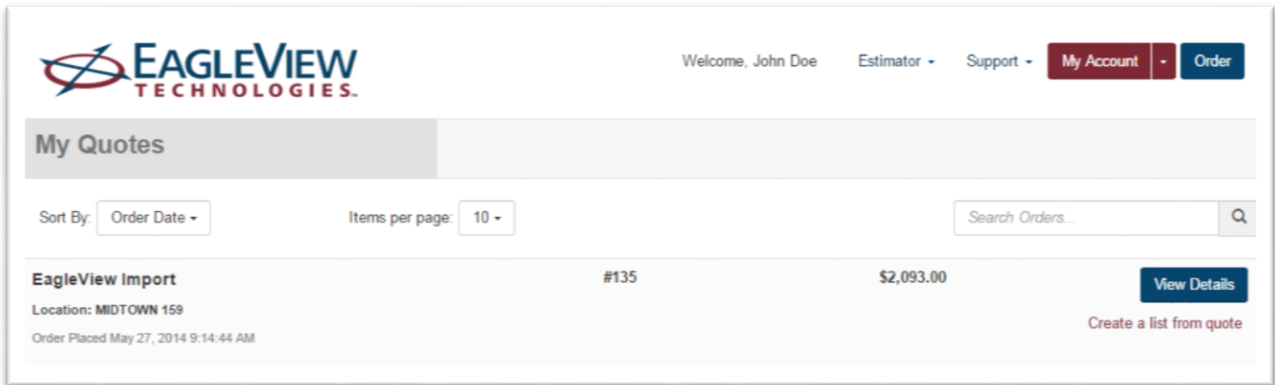
UOM – The unit of measure in which the material is sold.

Quantity – Click in this field to change the quantity of the material. The quantity must be a whole number.

Delete - Click in the Delete column to delete material.

My Material Quote Page

The My Material Quote page displays a list of the PQRs already created, including those lists you've ordered materials from. You might even keep different lists that contains materials for different types of projects and then order materials for several projects from the same materials list.



Your lists are available as long as you don't delete them.

To open this page click on the My Material Quotes under Estimator in the main navigation.

Components on this page

Sort by – Click and select **Order Date**, **Order Number**, or **Date** to sort the list alphabetically by name

Items per page – Click and select the number of items you wish to view on this page.

Search box– Type the quote number or the order name and click **Search** button to find a particular quote.

View Details – Click to open the Order History page and view the details of an order. On the Order History page, click the button to export the order details in Adobe PDF format or in Microsoft Excel CSV format.

Create a list from a quote – Click this link (under the View Details button) to create a new materials list from the materials on an existing order.

<<Prev and Next>> – If there are more items than can be displayed on this page (dependent on the selected Items per page), click to view the Previous or Next page of items.

Import Report Settings Page

Use the Import Report Settings page to select default materials to assign to each roofing component for each level of quality (good, better, best). Click the tab to choose the level of quality to be set up. These are defaults only. The same generic materials list items are available for all quality levels. The application does not make any determinations about what material quality is good, better, or best. That is strictly up to the user.

These defaults will automatically fill the materials page when ordering roofing materials.

To open this page click on the My Account in the Main Navigation and select Import Report Settings.

Components on this page

Good – Click this tab to select the materials to be assigned to each generic materials item for good-quality roofing materials.

Better – Click this tab to select the materials to be assigned to each generic materials item for better-quality roofing materials.

Best– Click this tab to select the materials to be assigned to each generic materials item for best-quality roofing materials.

Link SKU – Click to link a specific Home Depot material to each type of roofing material. You can select from materials available at the default Home Depot store location.

Save – Click to save changes.

Sales Proposal Settings Page

Use the Sales Proposal page to enter the default financial details to be used when creating sales proposals. (These are defaults only; details can be changed when creating the sales proposals.)

To open this page click on the My Account in the Main Navigation and select Sales Proposal Settings.

Components on this page

Profit – Type the percentage of profit desired for proposals

Overhead – Type an overhead percentage

Add Labor (\$)– If the preference is to charge a flat amount for labor, type the dollar amount

Add Labor (%) – If the preference is to charge for labor as a percentage of materials cost, type the percentage.

Labor Tax – Type the Labor Tax rate (a percentage) if the state requires this or if the desire is to add a labor tax rate to the proposal. This is not a common tax.

Material Tax – Type the sales tax rate (a percentage) applicable to jobs.

Other Fee – Type the dollar amount of any other fees that are desired in the proposal, such as a dumpster fee or other miscellaneous fees not included in the cost of materials or labor.

Save – Click to save changes.

Working with PQR

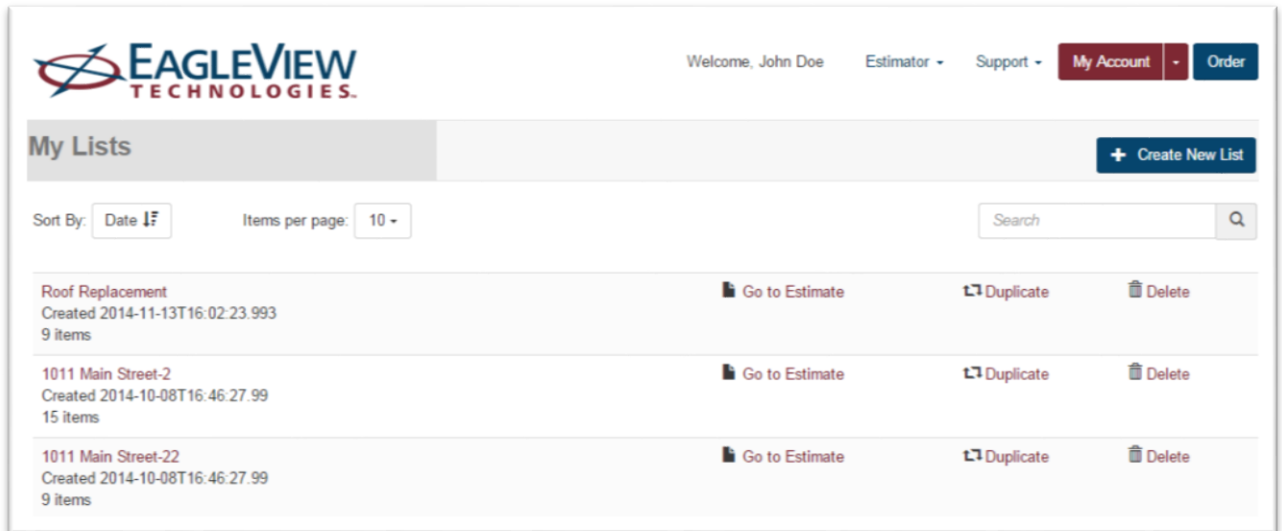
Viewing, Creating and Deleting PQRs

This section describes how to work with the list of PQRs on the My PQRs page. Specifically, it describes how to:

- View the My PQRs page, which shows a list of all the lists that have been created
- Create new lists from scratch
- Create new lists by copying existing lists
- Delete lists

Viewing a list of all PQRs

The My PQRs page shows the name of each PQRs that has been created, how many items are in each PQR and when each was created. Select a PQR from this page to open and work with its details.



In the Navigation Bar, click **My PQRs**. The My PQRs page opens.

From here, complete these tasks that pertain to PQRs as a whole (as opposed to the materials in a PQR):

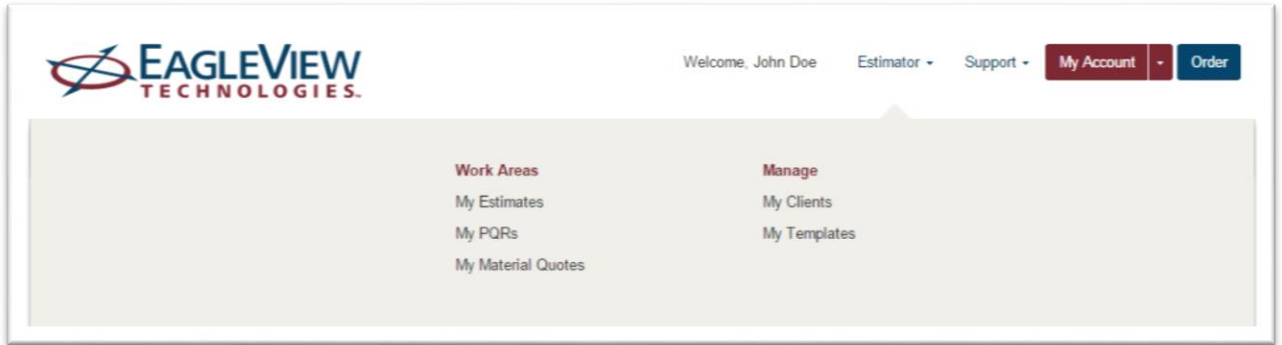
- Select a specific PQR to work with.
- Create a new PQR
- Go to Estimate.
- Duplicate (make a copy of) a PQR.
- Delete a PQR.

Creating a PQR

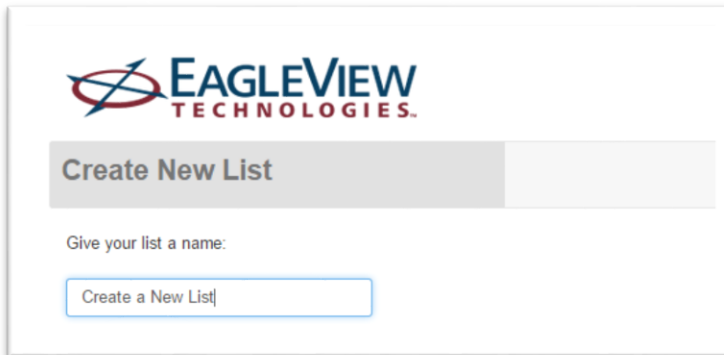
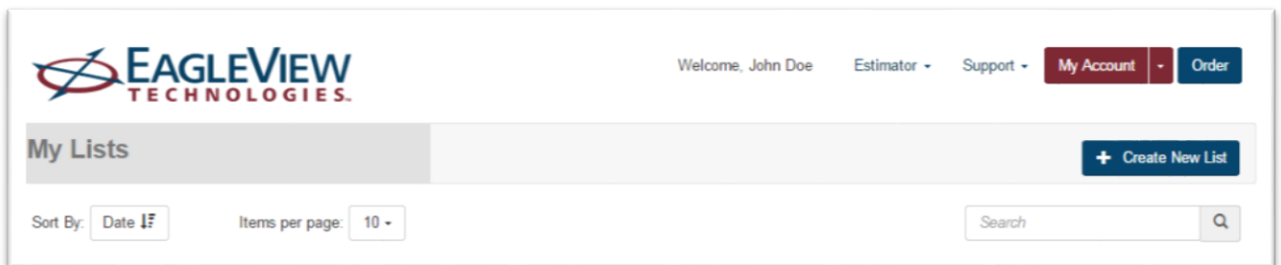
The following instructions describe how to create a new, empty PQR first, which can later have materials added.

Create a PQR

1. Click My **PQRs** in the Navigation Bar. The My PQRs page opens.



2. Click **Create New PQR**.



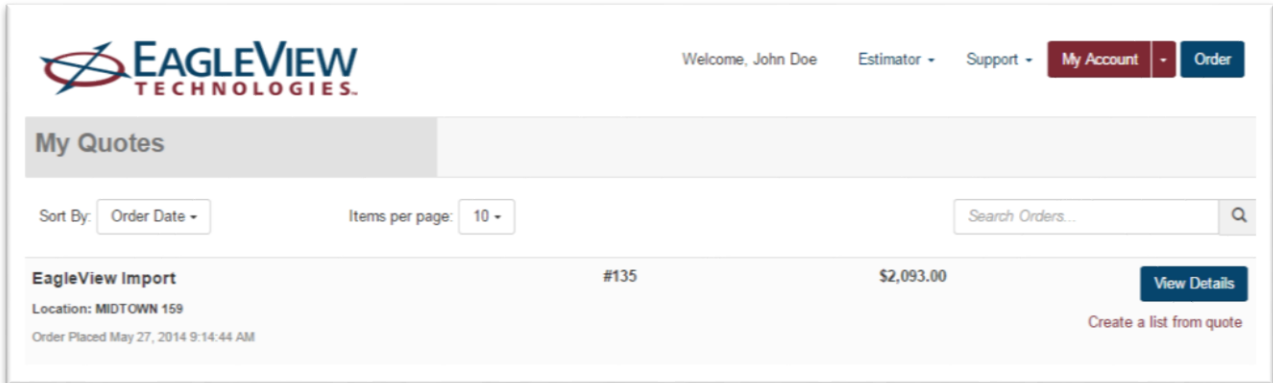
3. Click in the field and type a unique name for the new PQR, and click **Continue**. The PQR Detail page opens, with links for adding materials.

The screenshot shows the EagleView Technologies web application interface. At the top left is the logo for EagleView Technologies. To the right of the logo, the user is logged in as "John Doe" with roles "Estimator" and "Support". There are buttons for "My Account" and "Order". Below the header, there is a section titled "Create a New List" with a "(Change)" link. The "List Total" is displayed as "\$0.00". A breadcrumb trail shows "My Lists > Create a New List". There are three buttons: "+Add Line" (blue), "Actions" (white with a dropdown arrow), and "Create Quote" (maroon). A search bar contains the text "Search your list..." and a magnifying glass icon. Below this, a large maroon text prompt reads: "Add Line from the catalog, Import an EagleView Report or import a file." At the bottom left, there is a "+Add Line" link. At the bottom right, the "List Total" is again "\$0.00" and there is a "Create Quote" button.

4. Click one of the maroon links to add materials either from the catalog, from an existing PQR, or by importing a file.

Creating a PQR from an Order

Use the following procedure to create a new PQR from the materials included in an order you placed.

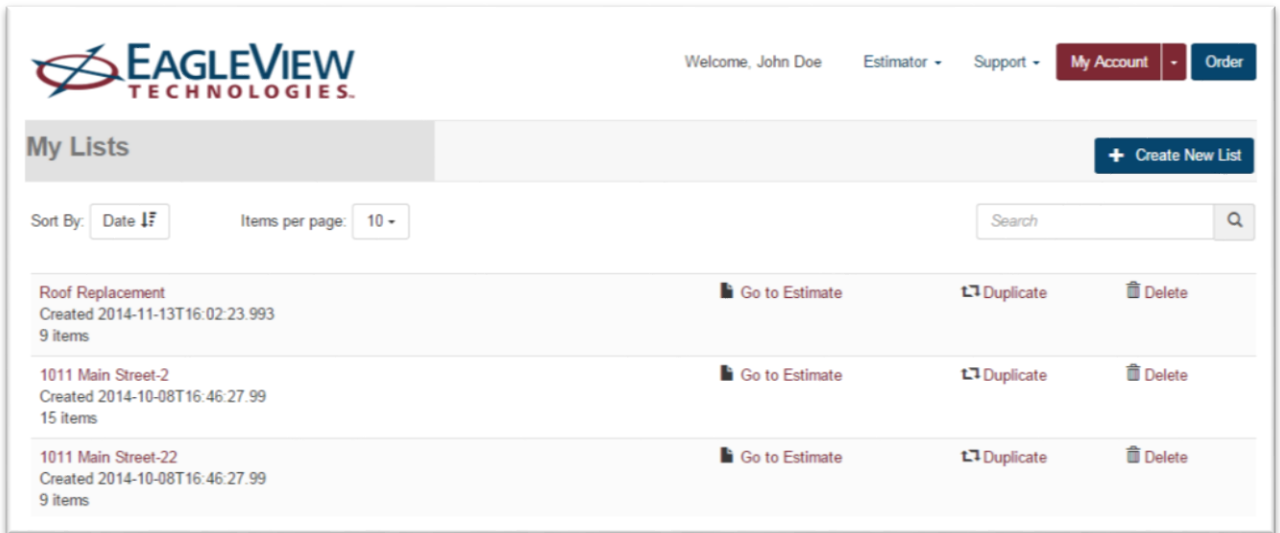


1. In the Navigation Bar, click **My Material Orders** to view your order history.
2. Find the order you want to create a PQR from, and click **Create a list from quote** (under its View Details button). The Create New PQR window opens.

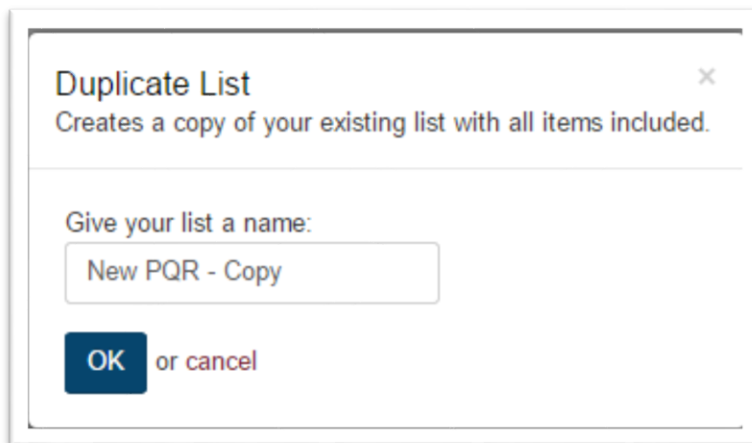
3. Type a name for the new PQR, and click **Continue**. A confirmation message appears briefly at the top of the page. The new PQR opens in the PQR Detail page.

Duplicating a PQR

A quick and easy way to create a new PQR is by creating a duplicate of an existing PQR. This is especially handy when you want to use the same materials you've used previously.



1. In the Navigation Bar, click **My PQRs**. The My PQRs page opens.
2. Click the **Duplicate** link for the PQR to be copied.



3. To change the default PQR name, click inside the New PQR Name box and change the PQR name as desired.
4. Click **OK**. A confirmation message appears briefly at the top of the page.

Deleting PQR

If a PQR is no longer needed, it can be deleted from the My PQRs page.

1. In the Navigation Bar, click **My PQRs**. The My PQRs page opens.

The screenshot shows the 'My Lists' page in the EagleView Technologies application. At the top, there is a navigation bar with the logo, user name 'John Doe', and links for 'Estimator', 'Support', 'My Account', and 'Order'. Below this, the 'My Lists' section features a '+ Create New List' button. A filter section allows sorting by 'Date' and setting 'Items per page' to '10'. A search bar is also present. The main content area displays a table of lists:

Item Name	Created	Items	Go to Estimate	Duplicate	Delete
Roof Replacement	2014-11-13T16:02:23.993	9 items	Go to Estimate	Duplicate	Delete
1011 Main Street-2	2014-10-08T16:46:27.99	15 items	Go to Estimate	Duplicate	Delete
1011 Main Street-22	2014-10-08T16:46:27.99	9 items	Go to Estimate	Duplicate	Delete

2. Click the **Delete** link for the PQR to be deleted.
3. When asked if you are sure, click **Delete PQR**. A confirmation message appears briefly at the top of the page.

Importing SKU's from a spreadsheet or CSV file

Materials can be quickly added to a PQR by importing an Excel spreadsheet or CSV file that contains SKUs and quantities; the easiest way to import a file is to use the sample template provided by this application to enter material information. (The instructions in this topic indicate how to download the sample template.)

Import file requirements

To create an import file, it must meet these requirements:

- It must have one of these file name extensions: .xls, .xlsx, or .csv.
- It must have four column headings, as shown here:

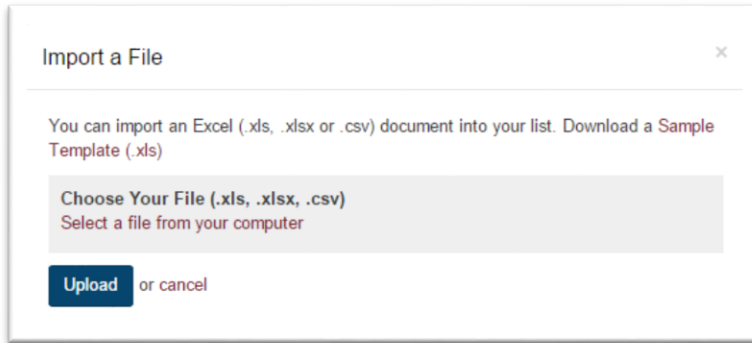
	A	B	C	D	E
1	SKU	QTY	Category	Description	
2					
3					
4					

- The columns must be in the order shown above.
- The SKU and QTY must be all upper case.

All the columns in the spreadsheet do not have to be filled in; however, the SKU must be included. (The application will fill in the Category and Description fields from the material catalog. If a description is entered, it might be overwritten by the description in the catalog.)

NOTE: If a quantity is not entered for a SKU, the material is added with a quantity zero.

1. On the PQR Detail page, click **Actions > Import a File**.



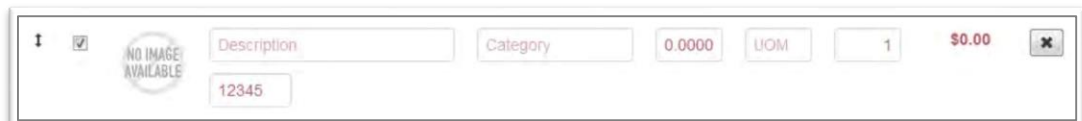
2. To download a sample template in which to enter material information, click **Sample Template (.xls)** and save the sample template to your hard drive. Give the file a meaningful name, and note where it was saved on the computer.
3. Open the downloaded file, enter the SKUs and quantities (and optionally, the material category and description).
4. To import a file, click **Select a file from your computer** and choose a file to upload. The file name is shown on the window.
5. Click **Upload**. A confirmation message appears briefly at the top of the page.

The materials are added to the bottom of the active PQR in the order in which they appeared in the spreadsheet.

TIP: Re-arrange items in the PQR by dragging an item's drag-and-drop icon  .

The application checks if the SKUs of the added materials are valid and if they are available at the store location shown.

If a SKU is not found, the material information is shown with red text. "No Image Available" appears in the Material column and the Unit Price is \$0.00. The information stays in your PQR, and will appear in reports and orders.



Adding materials from another PQR

Materials from another PQR can be quickly added to the active PQR. This does not change the other PQR in any way. This might be handy a master PQR of materials exists and will be used repeatedly.

1. On the PQR Detail page, click **Actions > Add an Existing PQR**. A PQR of all existing PQRs appears (with the most recently viewed PQRs shown first).

Select an Existing List ×

Viewing 1-5 of 51 Lists

New PQR Created 11/13/2014	<input type="button" value="Select"/>
Create a New List Created 11/13/2014	<input type="button" value="Select"/>
Roof Replacement Created 11/13/2014	<input type="button" value="Select"/>
1011 Main Street-37 Created 10/8/2014	<input type="button" value="Select"/>
1011 Main Street-2 Created 10/8/2014	<input type="button" value="Select"/>

2. Select a PQR, using the following chart as a guide.

If ...	Do this ...
The PQR you want <u>is not</u> on this page	Do one of these things: <ul style="list-style-type: none"> n Search for the PQR by typing its name in the search box and clicking Search. When you find it, click its Select button. n Click Next>> to display the next page of PQRs. (Click <<Prev if you need to go
The PQR you want <u>is</u> on this page	Click its Select button.

All materials from the selected PQR are added to the bottom of the active PQR shown on the PQR Detail page.

TIP: Re-arrange the items in the PQR by dragging an item's drag-and-drop icon



Filtering and Sorting a PQR by Category

On the PQR Detail page, the user can group materials by category, change the order in which categories are shown, and filter out materials from specific categories. This allows the user to work with a small subset of a PQR, and is an easy way to rearrange the materials in the PQR by category (instead of manually dragging and dropping rows).

NOTE: Filtering by category does not change which items are saved in the PQR. Filtering simply allows you to display and work with a smaller group of similar items on the page.

EXAMPLE:

When might filtering be handy? Suppose you created a large PQR and added several types of materials to it, maybe bath materials, roofing materials, electrical materials and drywall materials. And suppose you want to place a quote for only the bath materials. You might filter the PQR to show all items in the bath category, click the check box for each item you want to quote, and then place a quote. You can later change the filter to view everything in the PQR, or to view other materials.

Important: Clicking the check box in the column headings row select all materials, even those you've filtered out.

Category Text

Use the text shown in the Category column to filter and sort the items in the active PQR. When a material is added to a PQR, the PQR application fills in the category field with default text, which comes from the name of the highest-level category for that material. That text appears in the Category column on the PQR Detail page, as shown here.

<input checked="" type="checkbox"/>	Description	SKU	Category
<input checked="" type="checkbox"/>	15# Felt Underlayment - 432 SF	SKU#	Roofing
<input checked="" type="checkbox"/>	Ice and Water Shield - 225 SF	SKU#	Roofing
<input checked="" type="checkbox"/>	25 Year 3-Tab Shingles - 3 Bdl/Sq	SKU#	Roofing
<input checked="" type="checkbox"/>	Galvanized Steel W Valley Flashing - 2	SKU#	Roofing

The category text is used only for filtering and sorting the PQR. The default text can be left as is or it can be changed to be relevant for items in the PQR. Changing the text allows for sorting and filtering by categories created by the user.

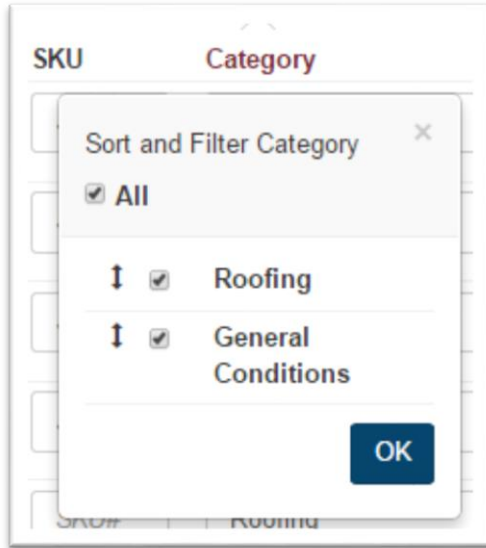
EXAMPLE:

You might have two bathroom renovations, a master bathroom and a powder room, you might have two different sinks in your PQR. By changing the category for one item to "Master Bathroom" and the other to "Powder Room" you can filter the items by one of those categories and place an order for only the items you need for one of those projects.

1. Click inside the category field to be changed.
2. Highlight the text in the field and type the new category text.
3. Click **Save**.

Detailed Instructions

1. On the PQR Detail page, click the (orange) **Category** column heading. A pop-up window shows all of the categories



2. Complete these tasks as desired, using this chart as a guide:

To ...	Do this ...
Show all categories	Make sure that the All check box is checked.
Filter the PQR by specific categories	Select the check boxes for the categories to be shown when the PQR is re-displayed. Clear the check boxes for categories you don't want shown.
Change the order of the categories	For each item to be rearranged, move its drag-and-drop icon to the desired spot in the category PQR.

3. Click **OK**.

The PQR Detail page is re-displayed and shows only those categories that were selected. All others are filtered out. The following example shows that all categories except for 'Master Bath' have been cleared.

4. To change the category order permanently, click **Save**.

Export a PQR to Excel

The PQR can be exported in Excel or CSV format so it can easily be imported to another user account (using the Import a File option on the Actions PQR.)

TIP: This feature is also helpful for working with PQR data in Excel or to use it in other applications, such as Microsoft Word.

When you export a PQR to Excel, only the text is exported. Since CSV is a text-only format, material images cannot be exported.

1. Make sure the PQR is open.
2. On the PQR Detail page, click **Actions > Export PQR**.
3. Open or save the file to the hard drive, as desired. Here is an example of the type of information that is imported:

	A	B	C	D	E	F	G
1	Description	SKU	Category	Unit Price	UoM	QTY	Item Total
2	Cadet3 Bone Ch Rnd Toilet 2Pc	757484	Bath	198	EA	1	198
3	Casual 48" Cognac Vnty Cab	877385	Bath	399	EA	1	399
4	5' Maui White Bathtub Rh	573689	Bath	179	EA	1	179


Editing Material Details

Edit the Description, SKU, Unit Price and UoM fields.

1. Click your mouse inside the field you want to change.
2. Highlight the text or value in the field and type the new text or value.
3. Click **Save**.

Deleting Materials

Delete material from a PQR on the PQR Detail page.

- Click  in the Delete column in that material's row.

Importing an EagleView Report

EagleView Technologies roof measurement reports include the roof measurements needed to estimate and order materials for roofing projects. Order an EagleView report from the EagleView website (<http://thd.eagleview.com/>).

Once the roof measurement report is received, make note of the report number. The report number is needed to import the EagleView report into the PQR application.

When an EagleView report is imported, the PQR application calculates the quantities and cost of the materials needed for the roofing project and builds a PQR with the quantities and costs of the materials selected.

Overview

Here's a summary of the process of importing an EagleView report.

Here's an explanation of each major step:

1	Set up default roofing materials for good, better, and best qualities of materials (Settings > Scope of Work tab).
2	Create a PQR. At the end of the process, the PQR application will fill out the PQR with the roofing materials and quantities needed for your roofing project.
3	Select the option on the PQR Detail page to import an EagleView report.
4	The application verifies the EagleView report number.
5	The application displays the default materials from the Scope of Work tab on the Settings page for the quality currently selected.
6	Select a quality (good, better, or best).
7	Optionally select different materials (like composite 30 year, 3 tab instead of 25 year).

8	Import the EagleView roof report.
9	The PQR application calculates quantities based on the measurements in the EagleView report, and displays the resulting PQR with the quantities needed to complete the roofing project and the cost for each material.
10	Import the EagleView roof report.
11	The PQR application calculates quantities based on the measurements in the EagleView report and displays the resulting PQR with the quantities needed to complete the roofing project and the cost for each material.

Detailed Instructions

Here are detailed instructions for importing an EagleView report.

1. If not already done, set up material defaults for good, better and best quality. (Click **Settings** > **Scope of Work** tab. See "Scope of Work page" on page 13 for more details.)
2. Create a PQR for the roofing project you will be estimating or ordering materials for (or open an existing PQR).

Important: If you start with an existing PQR, the application does not change any items already in the PQR (even if the PQR contains roofing materials). At the end of the import procedure, the wizard adds new lines for roofing materials to the open PQR.


2. On the PQR Detail page, click **Actions** > **Import an EagleView Report**. The Import an EagleView Report page opens
3. page opens

4. Click in the field and type the EagleView report number for this project, then click **Get Report**.

The application checks the report number to be sure it's valid.

Import an EagleView Report

EagleView Report Number



We found your report!
← View Notes Diagram for this report.
(cancel)

Quality:

Good
 Better
 Best

Line Item Type:

Combined Labor & Material
 Separate Labor & Material

Select Materials:

5. Select the quality of the materials wanted for this roofing project: **Good**, **Better**, or **Best**. The default materials for the selected quality are displayed.
6. (*Optional*) To select a different material item for a material type (such as "shingles"), open the drop-down PQR and select a material. (The same drop-down PQR options are available for all qualities.)

Import the report:

When done selecting materials, click **Next**. (The Import Report button is at the bottom of the page. You might need to scroll to see it.) The EagleView report is imported and the PQR Detail page appears, showing the materials

What you do next depends on your needs. You might choose to print out the PQR by selecting **Reports** in the Actions menu, or you might create a sales proposal or an order for the materials on this PQR.

Unit of Measure Table

BAG	Bag	NT	Night
BDL	Bundle	PKG	Package
BX	Box	PR	Pair
CY	Cubic Yard	QT	Quart
DAY	Day	ROL	Roll
EA	Each	SET	Set
FT	Foot	SF	Square Foot
GAL	Gallon	SHT	Sheet
HR	Hour	SQ	Square
LBS	Pounds	SY	Square Yard
LF	Lineal Foot	TB	Tube
LI	Lineal Inch	TON	Ton
MI	Mile	YD	Yard
MO	Month		