



# *Allpro Insulator*

*Insulation Contractor Software*

## *Software Brochure*

*(Version 6 – 02/28/2011)*

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# Allpro Insulator Overview

*Allpro Insulator* was developed specifically for insulation contractors. Regardless of whether you use cellulose, foam, or fiberglass insulation, *Allpro Insulator* will fit your needs perfectly. *Allpro Insulator* is even a perfect fit for mechanical insulation contractors. As long as your primary pricing is based on a square or lineal ft value, *Allpro Insulator* can help simplify your estimating process.

This software completely automates the estimating process and takes the guess work out of estimating insulation jobs. Contractors can take electronic measurements using a laser measuring device or on-screen blueprint takeoff software, and then export those measurements to *Allpro Insulator*. The measurements can then be used to automatically create an estimate, based on the square footage or lineal feet pulled from the laser or blueprint takeoff. Once you are finished creating the estimate, you have the option to send that estimate directly to QuickBooks or manage your estimates directly with *Allpro Insulator*. This allows you to create and manage estimates with *Allpro Insulator* and also benefit from all the accounting features found in QuickBooks.

*Allpro Insulator* allows you to use only the features you choose. You can use *Allpro Insulator* independently to manage your business or you can choose to integrate the software with the laser measuring device, blueprint takeoff software, and/or QuickBooks.

## Key Features

- Manage Customers and Jobs
- Create Insulation Estimates and Invoices
- Produce Insulation Estimates on the Job Site
- Merge Estimate Data with Your Contracts
- Synchronize Laptop with Office
- Does Not Require an Internet Connection
- Track Accounts Receivable
- Manage Estimate Pricing/Costing
- Provide Detailed Package Options
- Create Detailed Job Sheets
- Manage Job Expenses
- Track Employee Wages
- Manage Job Schedule
- Manage warehouse inventory
- Manage Tasks and Activities
- Print Over Fifty Reports
- Import Measurements from Laser
- Import Measurements from Takeoff Live (blueprint takeoff software)
- Send Estimates to QuickBooks

## **Time is Money**

- Literally Cut Your Administration Time In Half
- Eliminate Wasted Time by Entering Information Only Once
- Produce Insulation Estimates for Customers Right Away on the Job Site
- Easily do blueprint takeoffs right on your computer screen - no paper print required!
- Faster and More Accurate Billing Process
- Offer your customer upgrades to help increase revenue
- Easily review sales reps current activities and job statuses
- Easily Determine Who Owes You Money and How Much
- Manage Your Crews Schedule In One Convenient Place
- Manage your warehouse inventory
- Synchronize data over the internet (requires Allpro Web Sync Software)

## **Allpro Insulator Version 6 - Now Available**

- Not only manage items but fully manage actual Product Materials
- Manage Supplier and Manufacturer information
- Full product inventory control including projected inventory
- Easily offer estimate line item upgrades to your customers
- Track Estimate Percentages (sales tax, sales commission, etc.)
- Custom discount feature which allows you to apply a discount to only selected records
- Automatically export estimates to Adobe PDF format and automatically create an email message
- Full Sales rep control including price locking, estimate restrictions, estimate number ranges
- Full customer management including managing sub contacts, calls, and emails
- Full Google map integration including maps and directions
- Save custom grid layouts and show/hide columns with the new field chooser
- Spell check has been added to the large text boxes found throughout Allpro Insulator
- A new backup process has been added so you can easily backup your data
- We created a new and up to date video training series that covers every aspect of Allpro Insulator
- Tabbed interface (work on multiple forms at the same time)
- Multi-company support (manage multiple companies independently)
- Support for Takeoff Live Software (for blueprint takeoffs)
- Notes form allows you to easily manage all your tasks
- Enhanced calendar filtering (easily find the appointments you are looking for)
- Has been fully tested on Windows Vista and Windows 7
- Works with the Leica Disto A6 Laser!
- Synchronize data between two or more computers!
- Merge estimate data with your own custom contracts!
- Print your own custom letterhead on the estimate!
- Email estimates with your digital signature!
- Includes Allpro SchedulePro (\$1,000 Value)!
- Fully integrated job scheduling!
- Simpler QuickBooks integration!
- Remote access technical support!
- Many more new features...

## **NEW - Allpro Web Sync Software**

Allpro Insulator is now compatible with our all new Allpro Web Sync software which allows you to synchronize multiple databases over the internet (Allpro Web Sync is available for \$120 per year).

Our all new Allpro Web Sync software allows you to synchronize all of your out of the office Allpro Insulator databases with your primary database in the office. Allpro Web Sync utilizes cloud data storage technologies to copy the databases from each of your out of the office computers to your primary computer in the office.

The best part about this software is you don't have to rely on your sales reps remembering to synchronize. All of the synchronizing is done on the primary computer in the office. All your sales reps have to do is ensure that after they have completed any new estimates that need to be synchronized they keep their computer connected to the internet long enough for their database to copy over to your main office computer. Allpro Web Sync can then be scheduled to synchronize some or all of your databases at specific dates and times. You can create multiple sync groups and schedules for the utmost synchronizing flexibility available. Note that Allpro Web Sync is a separate program that must be purchased separately.

Allpro Web Sync is a subscription based software application which requires you to pay an annual fee to continue using the software. We are currently offering a one year subscription for \$120.

Our Allpro Web Sync software works in conjunction with Dropbox online data storage. They currently offer up to 2GB of storage for free. If you require additional online storage space Dropbox currently offers 50GB of space for \$9.99 per month. Note that unless you have a very large sales force that works out of the office you will likely not need more than 2GB of storage space.

## **Remote Access Technical Support**

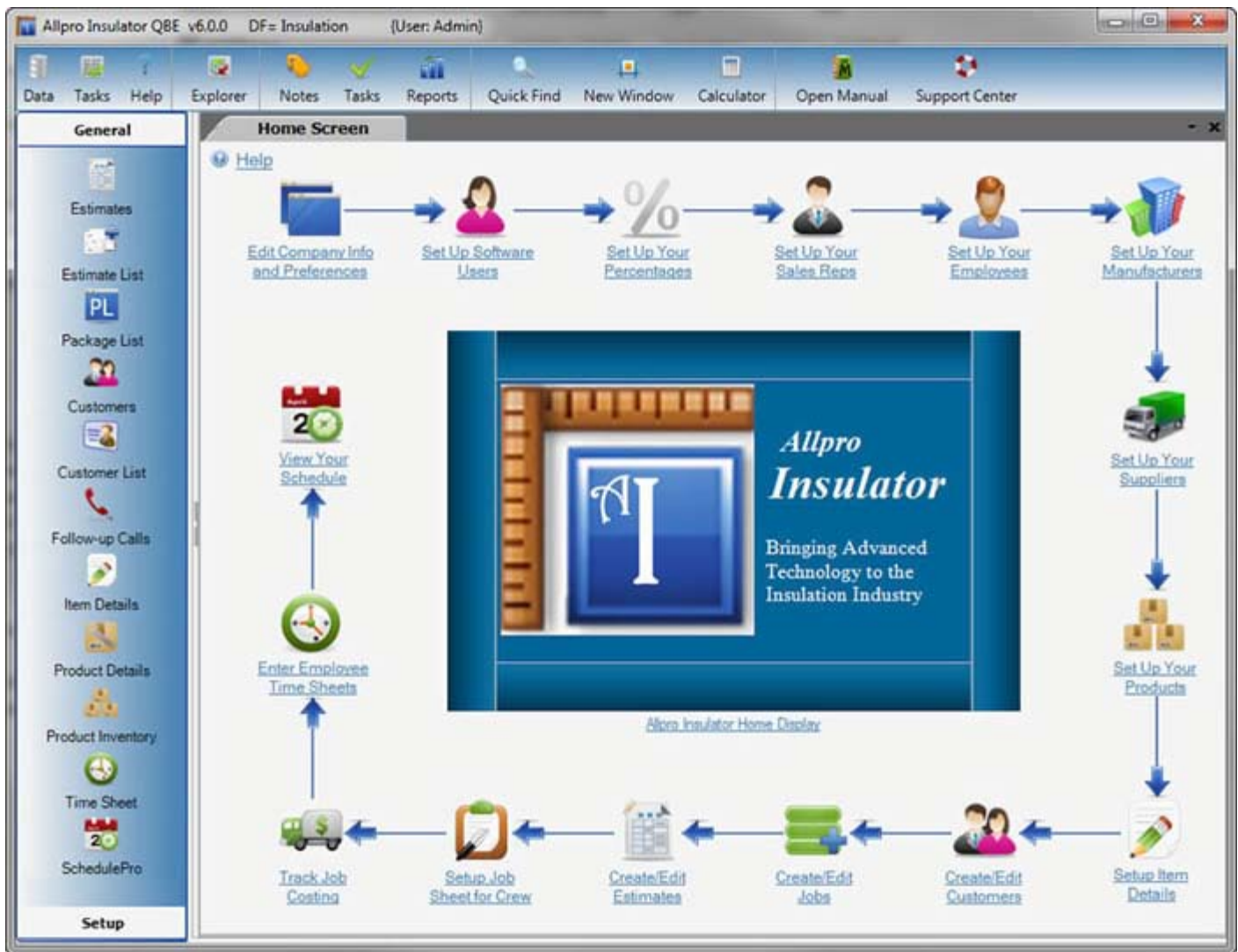
We are proud to now offer our Allpro Insulator customers remote access technical support. While Allpro Insulator is now easier than ever to use, we understand that situations may arise where you need additional help. Allpro Insulator comes with a comprehensive 90 page manual and a 1 1/2 hour training video to help you get started. If you are having problems with the software or need additional training after you have referenced the manual and the training video, we do offer limited remote access technical support to help you get moving forward faster.

Remote access support allows us to invite you to an online support session. Once you join the session we will be able to control your computer remotely with our Monitor, Keyboard, and Mouse. This will allow us to help you visually, rather than trying to explain steps over the phone or via email. This advanced technology is sure to make even the most difficult issue a breeze.

# Allpro Insulator Details

The screen shot below shows the main screen that is displayed when you open Allpro Insulator. When you select an icon on the left side of the screen, that particular form is displayed in the main area of the form. This interface makes Allpro Insulator very easy to navigate around. All of your options are displayed right in front of you.

The Home Screen provides you with the proper workflow information as well as quick links to common tasks. This Home Screen makes navigation extremely simple. We have done everything possible to make this insulation contractor software very easy to use. We realize that not everyone has a computer expert in the office. With the help of our 1 1/2 hour training video and our telephone / remote access support, we truly believe anyone can learn this insulation estimating software!



## **Two Editions To Choose From**

*Allpro Insulator* is available in two editions.

- Allpro Insulator SAE (Stand Alone Edition)
- Allpro Insulator QBE (QuickBooks Edition)

Both editions include the same basic features and functionality with the following exceptions:

The Stand Alone Edition allows you to manually enter line items or import job measurements from your laser and then manage all your customers, estimates, invoices, and receivables from directly within *Allpro Insulator*.

The QuickBooks Edition provides all the same functionality as the Stand Alone Edition plus QuickBooks integration. After you have completed the estimate, you will have the option to send the estimate to QuickBooks. You will then be able to harness all of the accounting benefits of QuickBooks without having to manually reenter the estimate. This edition also allows you to share all of your customer, job, and item data between *Allpro Insulator* and QuickBooks.

## **System Requirements**

In order to run *Allpro Insulator* properly, your computer must meet the following minimum system requirements.

- Microsoft Windows 98SE, ME, 2000, XP, or Vista (32-Bit Only)
- A Personal Computer Using a 500MHz or Higher Processor
- 128MB of RAM (512MB Recommended)
- Hard Drive With 250MB of Free Space
- 1024x768 or Higher Resolution Video
- Mouse or Compatible Pointing Device
- Parallel or USB Port
- Microsoft Internet Explorer 6.0 or Higher
- Microsoft .Net Framework Version 2.0 (Downloadable From Our Website)
- Microsoft Excel 2000 or Higher (If you plan on using a laser, Takeoff Live, or merge documents)
- Microsoft Word 2000 or Higher (If you plan on merging documents)
- Microsoft Outlook 2000 or Higher (If you plan on importing email messages)
- QuickBooks Pro 2002 or Higher (If you plan to import from or export to QuickBooks)

## Allpro Insulator Tour

When we developed *Allpro Insulator* we took every effort possible to make the program very easy to use but also very functional. With the capabilities to import measurements from a laser measuring device and then export estimates directly to QuickBooks, this program is undeniably powerful and feature packed.

We could have dozens of pages devoted to listing all the powerful features in *Allpro Insulator* but we believe the best way to get a good understanding of the software is to see it in action.

### Taking Measurements with the Disto A6 Laser



Taking measurements is as easy as aiming and pushing a button. The Disto A6 is a very functional and accurate measuring device. Even with long measurements the Disto A6 is accurate with 2 mm.

The Disto A6 has Bluetooth technology that allows you to wirelessly transfer your laser measurements from the laser to your Windows based PDA or Smartphone. After you take a measurement you can select the Bluetooth button on the laser. The measurement will then be sent wirelessly to a Microsoft Excel spreadsheet on your PDA. You can then enter a measurement ID on your PDA.

For example, if you measure a four inch wall, you may want to enter "104" on your PDA so you know that particular measurement was for a four inch wall. When you import all of your measurements into *Allpro Insulator* all of the four inch wall measurements will be automatically combined. This will give you a total square footage for all of your four inch wall measurements.

#### Assigning Package ID Codes

You can also enter a Package ID on your PDA. Package IDs are used to distinguish between jobs and packages.

For example, when you go to your first job for that day, you could assign "1h" for that particular job. Then when you go to the next job site you could change the Package ID to "2h". This feature allows you to store measurements for several different jobs without having to upload the measurements into a computer between each job.

You can also use Package IDs to keep estimate options separate. For example, you may have a customer who knows they want to insulate their house but they are not sure if they want to do their garage. You could assign Package ID "1h" for the house and assign Package ID "1g" for the garage measurements. This will allow you to list these items separate on the estimate.

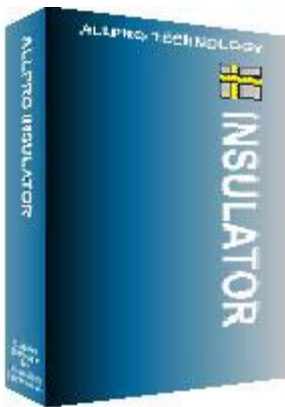


## ***Transferring Data from the Laser to Allpro Insulator***



As you are taking measurements with the Disto A6 you will be wirelessly transferring the measurements to a Microsoft Excel spreadsheet on your PDA. After you are finished taking all the measurements, you can transfer the Excel spreadsheet to your computer.

Once the spreadsheet has been copied to your computer you can import the data into *Allpro Insulator*. This is a very simple process. You simply open the Import form and select the "Import From Laser" button.



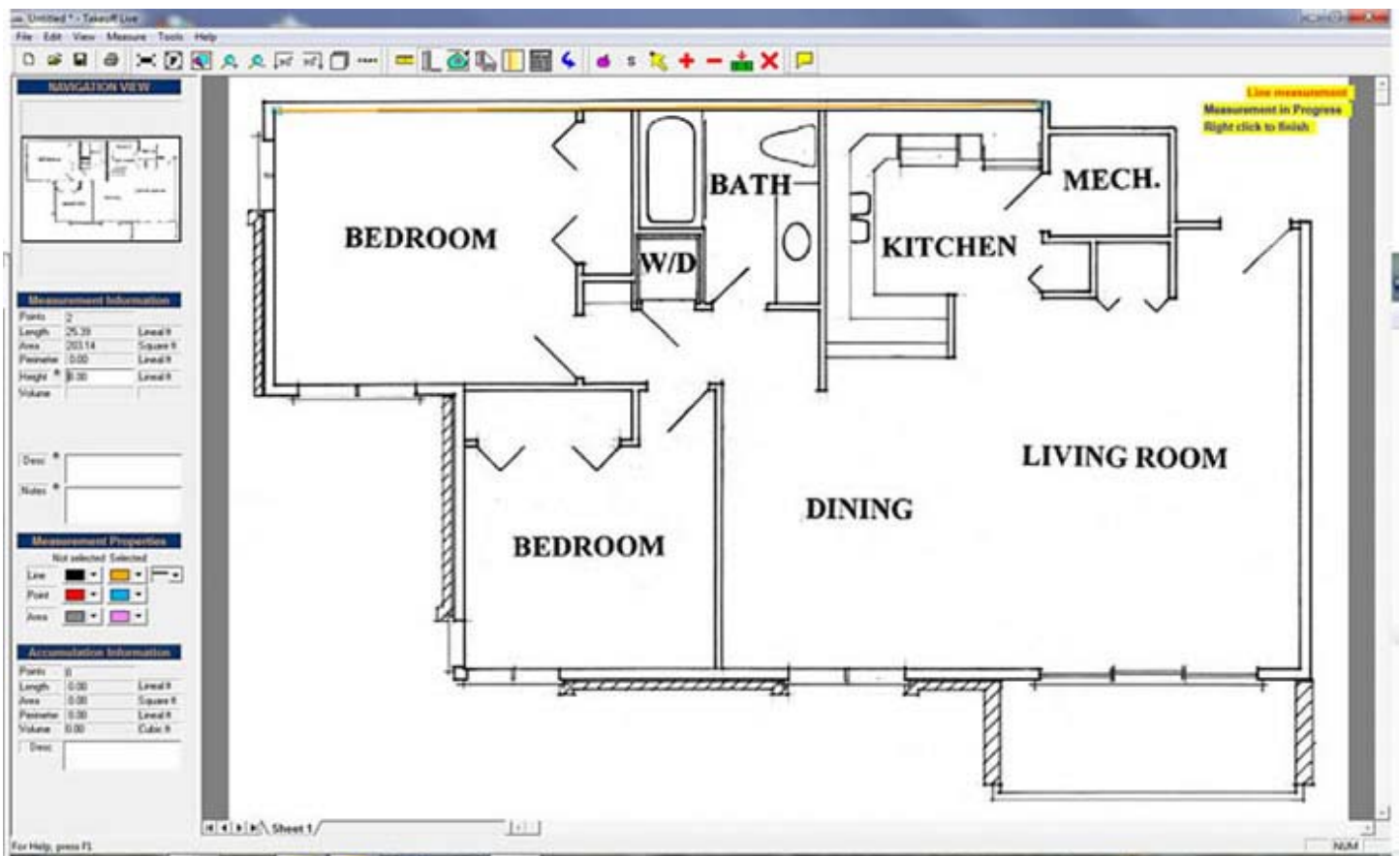
Now all of your job measurements are stored in *Allpro Insulator*. When you import all of your measurements they will be summarized. For example, if you took twenty different measurements for four inch walls, you don't need to know the square footage for each measurement, just the total square footage for four inch walls. *Allpro Insulator* performs these calculations for you to help simplify the estimating process. This also helps eliminate human calculation errors.

## Taking Measurements with Takeoff Live

*NOTE: Takeoff Live is a third party software application that allows you to easily do blueprint takeoffs right on your computer screen. Takeoff Live was not developed by Allpro Technology. Our software interfaces with the measurements taken with Takeoff Live through an Excel Spreadsheet that is outputted by Takeoff Live. Takeoff Live is available for purchase directly from Allpro Technology.*

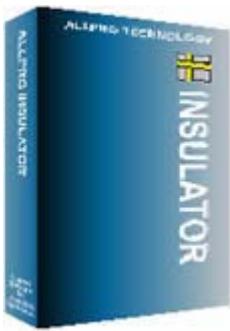
Takeoff Live is the most elegantly simple, affordable digital takeoff software on the market today. No digitizer or plan prints needed...you can even use a picture of your plans from your digital camera!

Even if you've never used a computer before, you can use Takeoff Live. You can calculate square footage, lineal footage, and even volumes in seconds with a simple point and click. The software is intuitive, and still provides the power and flexibility you need.



Takeoff Live is the paperless way to make your job fast, simple and hassle free. Figuring how much of any material is needed can now be done faster than ever. Takeoff Live can use scanned plans, plan pictures you take with your digital camera, as well as .TIF, .PDF, .GIF, Dodge Plan files, ISQFT Plan files, Blue Book plan files, .JPG, .BMP, and .PNG.

## ***Transferring Data From Takeoff Live to Allpro Insulator***



You use Takeoff Live to take all of your on-screen measurements. After you have finished taking all the measurements for a particular package Takeoff Live allows you to export those measurements to Microsoft Excel.

Once the spreadsheet has been copied to your computer you can import the data into Allpro Insulator. This is a very simple process. You simply open the Import form and select the "Import From Takeoff Live" button.

Now all of your job measurements are stored in Allpro Insulator. When you import all of your measurements they will be summarized. For example, if you took twenty different measurements for four inch walls, you don't need to know the square footage for each measurement, just the total square footage for four inch walls. Allpro Insulator performs these calculations for you to help simplify the estimating process. This also helps eliminate human calculation errors.

## Setting Up Your Items in Allpro Insulator

Before you can start creating estimates, you have to setup all of your items. All item information is managed on the Item Details form which is displayed below. If you are using Allpro Insulator QBE (QuickBooks Edition), all of your items will automatically be imported in from QuickBooks. You will not have to re-enter the Item ID or the Description. While QuickBooks provides you with several accounting features, it does not provide you with an easy way to calculate estimate prices and costs. That's where Allpro Insulator takes over.

Item Category	Item ID	Description	Material Price	Labor Price	Sales Price	Total Cost	Material Cost	Labor Cost 1	Labor Cost 2	Other Cost	Coverage / Unit	Sort	Hide	Product ID
Attic	ATTIC		0	0	0	0	0	0	0	0	1	0		
Attic	A6	~ 6" Flat Attic: Install insulation to 10" (R-38) in	0.5	0.45	0.95	0.57	0.32	0.22	0	0.03	35	103		Cellulose
Attic	A10	~ 10" Flat Attic: Install insulation to 10" (R-38) i	0.43	0.32	0.75	0.55	0.4	0.07	0.05	0.03	20	108		Cellulose
Attic	A12	~ 12" Flat Attic: Install insulation to 12" (R-44) vi	0.4	0.49	0.89	0.58	0.46	0.09	0	0.03	17	112		Cellulose
Attic	A14	~ 14" Flat Attic: Install insulation to 14" (R-50) i	0.6	0.38	0.98	0.64	0.5	0.1	0	0.04	15	113		Cellulose
Ceiling	RW	~ Rafterwall: Install insulation in rafterwall area.	0	0	1	0.63	0.48	0.11	0	0.04	14	114		Cellulose
Ceiling	SCA	~ Scissor Truss Cathedral: Insulate scissor truss	0	0	0.85	0.62	0.47	0.11	0	0.04	15	115		Cellulose
Ceiling	CATH	~ Vented Cathedral: Install insulation in vented c	0	0	1.6	0.84	0.6	0.2	0	0.04	12	120		Cellulose
Ceiling	TCATH	~ Cathedral Ceiling: Cathedral area tightblown w	0	0	1.7	0.91	0.65	0.22	0	0.04	21	128		Cellulose
Attic	BA12	~ Bonus Room Attic: Install insulation in attic are	0	0	1.1	0.75	0.46	0.25	0	0.04	15	130		Cellulose
Attic	AF	~ Attic/Floor area: Install insulation in attic and	0	0	1	0.79	0.55	0.2	0	0.04	10	132		Cellulose
	VENTILATI		0	0	0	0	0	0	0	0	1	200		
Venblation	CHAN	~ Vent Chutes: Install channel vent chutes in eve	0	0.37	2.5	1.33	0.55	0.75	0	0.03	1	206		VC16
Venblation	GV	~ Gable Vents: Install gable vents.	0	0.35	75	55.03	35	20	0	0.03	1	212		GV16
Venblation	RV	~ Roof Vents: Install roof vents.	0	0.4	50	30.03	15	15	0	0.03	1	216		RV16

The primary purpose of the Item Details form is to allow you to set pricing and costing values. The Sales Price column is where you enter the per square foot price you will be charging your customers for the current item. On the Estimate form you will be able to apply a discount percent for customers if needed. The Material Cost column is where you enter your actual raw material cost for the current item. The Labor Cost column is where you enter the estimated per square foot cost you will pay in labor to spray the insulation. The Other Cost column is where you enter any additional per square foot costs you want to associate with the item.

For example, you could figure a per square foot overhead cost and enter it into the item. The Total Cost column is automatically generated based on the values you enter in the Material Cost, Labor Cost, and Other Cost columns. This value helps you determine your job cost. You can also use this value if you choose to charge your customers based on a markup percent rather than by a sales price.

The Item Details form also provides you with a place to enter the estimated coverage per unit for each item. This value will be used on the job sheets so the crew will know how many units of material they will need for each job. The Sort Order column is used to determine the order the items will be displayed on the printed estimate. When you take measurements at a job, you will likely be taking wall measurements, then attic measurements, and then maybe some more wall measurements. Then all of these measurements will be automatically pulled into the estimate. The Sort Order column allows you to control the appearance of the estimate by sorting items based on how you choose.

NEW! - Allpro Insulator now has additional columns that allow you to enter your Material Price and Labor Price. These fields are especially useful when you are working with weatherization estimates which often require you to separate what you are charging for material and labor.

NEW! - Allpro Insulator now allows you to associate a Product ID with each item. The Product ID represents the actual material product you are using with the item. In most instances you would enter the manufacturers item number for the Product ID. Allpro Insulator uses the Product ID to manage warehouse inventory.

## Selecting Packages for Estimates

The first step to creating an estimate is to open the Open Estimates form and then select the New button. Then select the Customer you are creating the estimate for. If you are using Allpro Insulator QBE, your customer list will automatically be imported from QuickBooks. If you are using Allpro Insulator SAE, you can manage all your customers directly from Allpro Insulator.

The next step to creating an estimate is to select the Packages that you want to include in the current estimate. Remember that when you took measurements with the Laser Measuring Device or Takeoff Live you assigned a Package ID to each measurement. The image below shows the grid you use to select the Package IDs.

Select Customer / Job: Ralph Wood:330 3rd Ave Estimate #: 1003.00

Status: Estimate Price Style: Discount Date: 01/17/2011 Terms: Due on R PO #: 1810 Sales Rep: Dan Source of Order: Repeat Cus Percent: 0.00 % APPLY

Full Details (16) Packages (3) Job Sheet Projected vs. Actual

Setup the packages below that you want to include in the current estimate. All laser measurements from the selected packages will be automatically loaded into the current estimate. Once these measurements are loaded, they will no longer be available for other estimates.

Drag a column header here to group by that column.....

Package ID	Details	Package Name	Comments	Display Price	Include In Total	Display On JS	Send To QB	Sort	Status
<input checked="" type="checkbox"/>	Search Row: Enter your search criteria here.....			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
▶ 100		HOUSE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	Awarded
101		BONUS ROOM		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2	Awarded
102		GARAGE WALL		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	Pending
*				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Note: Only select the "Insert Measurements" button if you are inserting measurements from a laser or Takeoff Live. Ensure that you have selected the correct Packages before selecting the "Insert Measurements" button.

Insert Measurements (Q)

The Package ID column has a drop down list that displays all of the Package IDs that you imported from the laser or Takeoff Live that have not already been inserted in an estimate. You simply select the Package IDs you want to include in the current estimate. The image above shows a job with three separate options: the House, Bonus Room, and Garage Walls.

This grid also allows you to select how you want each job to be displayed on the estimate. The example above shows that both the House and the Bonus Room will be done for sure and they want to include those charges in the total on the estimate. The Garage Wall however, is not included in the total and it is set to display the option price separately. This is a convenient way to provide your customers with option pricing. You can also control which options will be displayed on the job sheets and which options you want to send to QuickBooks. This grid provides you with a lot of control over how your options will be displayed and billed.

Once you have selected all of the options you want to include in the current estimate you simply select the Insert Measurements button located at the bottom of the grid.

**NEW!** - Allpro Insulator now allows you to track the status of each package separately. This provides you with better monitoring control over projects that will be completed in multiple stages.

## Working With Line Items in Estimates

After you select the Insert Measurements button from the Packages tab, the Details grid will be displayed with all of the measurements associated to the Packages you selected. If you look at the image below you will see all of the summarized measurements for Package ID 100 (House), 101 (Bonus Room), and 102 (Garage Walls). The Qty column displays the total coverage per unit for each item. The Rate column is based on the prices you set on the Item Details form. Remember you have the option to apply a discount or a markup percent when you create the estimate.

The screenshot shows the software interface for creating an estimate. At the top, there is a toolbar with icons for Close, Edit, Save, Delete, New, First, Prev, 1 of 1, Next, Last, Search, Print, Action, Show, and Help. Below the toolbar, the customer information is displayed: "Select Customer / Job: Ralph Wood:330 3rd Ave" and "Estimate #: 1003.00".

The main grid displays the following data:

Package ID	Item Category	Item ID	Description	Qty	Rate	Total	Hide	Product ID
100	Attic	A12	~ 12" Flat Attic: Install insulation to 12" (R-44) with	728	\$0.89	\$647.92	<input type="checkbox"/>	Cellulose
100	Attic	RW	~ Rafterwall: Install insulation in rafterwall area. (	410	\$1	\$410.00	<input type="checkbox"/>	Cellulose
100	Attic	CATH	~ Vented Cathedral: Install insulation in vented ca	812	\$1.6	\$1,299.20	<input type="checkbox"/>	Cellulose
100	Attic	CHAN	~ Vent Chutes: Install channel vent chutes in every	248	\$2.5	\$620.00	<input type="checkbox"/>	Misc
100	Walls	W4	~ 4" Sidewalls: Install sprayed cellulose in 4" exte	961	\$0.65	\$624.65	<input type="checkbox"/>	Cellulose
100	Walls	W6	~ 6" Sidewalls: Install sprayed cellulose in 6" exter	2288	\$0.79	\$1,807.52	<input type="checkbox"/>	Cellulose
100	Walls	W6 Walkou	~ 6" Walkout/Daylight walls: Install sprayed cellul	346	\$0.79	\$273.34	<input type="checkbox"/>	Cellulose
100	Attic	FOAM	~ Foamboard: R-board type ceilings/backer install	6	\$18	\$108.00	<input type="checkbox"/>	FD55
100	Attic	BOX	~ Boxesill/Rimjoist: Boxesill/Rimjoist insulation (area	169	\$1	\$169.00	<input type="checkbox"/>	Cellulose
100	Misc	T&M		1	\$0	\$0.00	<input type="checkbox"/>	Cellulose
101	Attic	BA12	~ Bonus Room Attic: Install insulation in attic area	895	\$1.1	\$984.50	<input type="checkbox"/>	Cellulose
101	Attic	AF	~ Attic/Floor area: Install insulation in attic and un	574	\$1	\$574.00	<input type="checkbox"/>	Cellulose
101	Attic	CHAN	~ Vent Chutes: Install channel vent chutes in every	96	\$2.5	\$240.00	<input type="checkbox"/>	Misc
101	Walls	W4	~ 4" Sidewalls: Install sprayed cellulose in 4" exte	656	\$0.65	\$426.40	<input type="checkbox"/>	Cellulose
101	Walls	FOAM	~ Foamboard: R-board type ceilings/backer install	12	\$18	\$216.00	<input type="checkbox"/>	FD55
102	Walls	W6	~ 6" Sidewalls: Install sprayed cellulose in 6" exter	641	\$0.79	\$506.39	<input type="checkbox"/>	OC16R1

At the bottom of the grid, there are summary buttons: Total, Percentages (0), Upgrades (0), and Comments. Below the grid, there is a memo field with the text "Thanks For Your Business!" and a post status field with the text "No portions of this estimate have been sent to QuickBooks". The subtotal and total amounts are displayed as \$8,400.53.

Once the items have been inserted, you are free to edit them in any way. There may be some changes that you wish to make for the particular job. You can also create new records or delete records. *Allpro Insulator* does all the data entry and calculations for you but you are in no way limited to what is automatically inserted. For example, you may want to add an additional charge for long travel time. You can just create an additional line and enter the amount you would like to charge.

**NEW!** - Allpro Insulator now allows you to track estimate percentages. Examples of percentages you might add would be Sales Tax, Sales Commission, etc. You can choose to add the percentage amount to the estimate or exclude it from the price and store for reporting purposes only. For example, if you are calculating Sales Tax you will want to add that price to the estimate total. The value will be printed on the Estimate report. If you are calculating Sales Commission, you may not want to add the amount to the estimate price but you will want it to be calculated so you can generate reports showing a sales rep's sales commissions for a specific date range.

**NEW!** - Allpro Insulator now allows you to easily offer your customers line item upgrades. This allows you to enter upgrade options for selected line items and then display them on the printed estimate as an upgrade option. For example, if you are currently listing A10-C (Attic sprayed with 10" of cellulose at R38), you could offer A12-C (Attic sprayed with 12" of cellulose at R44) and A14-C (Attic sprayed with 14" of cellulose at R50) as upgrade options. The estimate will list the two upgrade options below the A10-C line item along with the upgrade price to go from A10-C to A12-C and from A10-C to A14-C. This new feature allows you to easily provide your customers with a list of upgrade options they can choose from.

## Sending Estimates to QuickBooks

The features listed on this page are only available with *Allpro Insulator QBE (QuickBooks Edition)*. *Allpro Insulator SAE (Stand Alone Edition)* allows you to convert estimates into invoices and then manage your receivables.

*Allpro Insulator* provides you with all the tools to easily create estimates and job sheets, as well as manage sales prices and actual job costs. *Allpro Insulator* however, is not a complete accounting program. If you run a large company and you want to have complete accounting and payroll capabilities than *Allpro Insulator* combined with QuickBooks is the perfect choice for you. As far as accounting goes, QuickBooks is a great program. It just doesn't have the custom tools insulation contractors need to easily create estimates and manage jobs.

The screenshot displays the Allpro Insulator software interface. At the top, there is a toolbar with icons for Close, Edit, Save, Delete, New, First, Prev, 1 of 1, Next, Last, Search, Print, Action, Show, and Help. Below the toolbar, the header section shows the customer and job information: "Select Customer / Job: Ralph Wood:330 3rd Ave" and "Estimate #: 1003.00". The header also includes fields for Status, Price Style, Date, Terms, PO #, Sales Rep, Source of Order, and Percent. The main table lists items with columns for Package ID, Item Category, Item ID, Description, Qty, Rate, Total, Hide, and Product ID. The bottom section shows a memo field with the text "Thanks For Your Business!", a post status message "No portions of this estimate have been sent to QuickBooks", and a subtotal of \$8,400.53.

Package ID	Item Category	Item ID	Description	Qty	Rate	Total	Hide	Product ID
100	Attic	A12	~ 12" Flat Attic: Install insulation to 12" (R-44) with	728	\$0.89	\$647.92	<input type="checkbox"/>	Cellulose
100	Attic	RW	~ Rafterwall: Install insulation in rafterwall area. (	410	\$1	\$410.00	<input type="checkbox"/>	Cellulose
100	Attic	CATH	~ Vented Cathedral: Install insulation in vented ca	812	\$1.6	\$1,299.20	<input type="checkbox"/>	Cellulose
100	Attic	CHAN	~ Vent Chutes: Install channel vent chutes in every	248	\$2.5	\$620.00	<input type="checkbox"/>	Misc
100	Walls	W4	~ 4" Sidewalls: Install sprayed cellulose in 4" exte	961	\$0.65	\$624.65	<input type="checkbox"/>	Cellulose
100	Walls	W6	~ 6" Sidewalls: Install sprayed cellulose in 6" exter	2288	\$0.79	\$1,807.52	<input type="checkbox"/>	Cellulose
100	Walls	W6 Walkou	~ 6" Walkout/Daylight walls: Install sprayed cellul	346	\$0.79	\$273.34	<input type="checkbox"/>	Cellulose
100	Attic	FOAM	~ Foamboard: R-board type ceilings/backer install	6	\$18	\$108.00	<input type="checkbox"/>	FD55
100	Attic	BOX	~ Boxsill/Rimjoist: Boxsill/Rimjoist insulation (area	169	\$1	\$169.00	<input type="checkbox"/>	Cellulose
100	Misc	T&M		1	\$0	\$0.00	<input type="checkbox"/>	Cellulose
101	Attic	BA12	~ Bonus Room Attic: Install insulation in attic area	895	\$1.1	\$984.50	<input type="checkbox"/>	Cellulose
101	Attic	AF	~ Attic/Floor area: Install insulation in attic and un	574	\$1	\$574.00	<input type="checkbox"/>	Cellulose
101	Attic	CHAN	~ Vent Chutes: Install channel vent chutes in every	96	\$2.5	\$240.00	<input type="checkbox"/>	Misc
101	Walls	W4	~ 4" Sidewalls: Install sprayed cellulose in 4" exte	656	\$0.65	\$426.40	<input type="checkbox"/>	Cellulose
101	Walls	FOAM	~ Foamboard: R-board type ceilings/backer install	12	\$18	\$216.00	<input type="checkbox"/>	FD55
102	Walls	W6	~ 6" Sidewalls: Install sprayed cellulose in 6" exter	641	\$0.79	\$506.39	<input type="checkbox"/>	OC16R1

**Total**    Percentages (0)    Upgrades (0)    Comments

Memo:  Thanks For Your Business!    Subtotal: **\$8,400.53**

Post Status: **No portions of this estimate have been sent to QuickBooks**    Total: **\$8,400.53**

Once you have finished making any necessary changes to the estimate, you have the option to send the estimate to QuickBooks. This typically won't be done until the estimate has been accepted by your customer. This process couldn't be any easier. You simply open the estimate you want to send to QuickBooks and then select the Create QB Estimate button located at the top of the screen. After you select the button, there will be about a

three second pause, and then you will receive confirmation that the estimate was successfully created. You can then open the Estimates form in QuickBooks and the new estimate will be displayed. The estimate can then be invoiced and further processed with QuickBooks. The estimate will however, still be in Insulator where you can create job sheets and track actual job costs.

## Scheduling Appointments with Allpro SchedulePro

*Allpro Insulator* also provides you with complete job and appointment scheduling capabilities. *Allpro Insulator* includes all of our comprehensive scheduling components (*Allpro SchedulePro*). This is not just another drop in scheduling component (similar to what you would get with Microsoft Outlook). *Allpro SchedulePro* is fully integrated with *Allpro Insulator* so you can easily schedule and monitor the status of all of your current jobs. You simply select the "*Allpro SchedulePro*" button from the main menu bar and *Allpro SchedulePro* will be opened in a new window. This comprehensive scheduling control allows you to:

- Create detailed appointments
- View your appointments in the Day, Work Week, Week, Month, or Timeline View
- Create recurring appointments
- Maintain multiple calendars (Prep Crew, Wall Crew, Estimates, Office, etc.)
- View schedule for each crew or merge all schedules into one calendar
- Filter appointments by Customer/Job to easily track specific jobs
- New Advanced Filter panel allows you to easily find the appointments you are looking for
- Set Alarm/Reminders so you never miss an appointment
- Drag appointments from one calendar to another
- Print calendars in any view to take on the road

## Working with the Day View

The Day View Calendar displayed below provides you with details about the appointments for any given day. This calendar provides you with a place to enter details about the jobs that will be performed that day. To display the *Day* view calendar select the *Day* button on the toolbar.

The screenshot shows the Allpro SchedulePro software interface. The title bar reads "Allpro SchedulePro". The toolbar contains icons for Tools, Save, Refresh, Print, Day, Work Week, Week, Month, Timeline, Group By, Resource, Date, No Grouping, and Exit. The "Day" button is selected.

**Date Navigator**

February 2009

S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

March 2009

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today

**Displayed Resources**

- Atbc Crew
- Estimates
- Prep Crew
- Wall Crew

**Prep Crew**

Thursday, February 05

P/ Best Builders: 8732 Clark St. 616-325-4567 616-357-6789 (8732 Clark St., Allegan)

6 AM

7:00

8:00 W/ Best Builders: 1512 w/ 14x26 Cathedral 616-325-4567 616-357-6789 (1512 S. Johnson St.)  
The job is located on Johnson St. It is the third driveway on the left past Lincoln Rd. You are going to want to prep both the house and the garage. The property owner's name is Dave Look.

9:00

10:00

11:00

12 PM

1:00 P/ Sharp Construction: Larry Loving Residence 517-243-3467 (1455 Clark St., Owosso)  
Clark St. is the first road on your left past Tony Rd. while traveling on Highway 115. You will be turning into the second driveway on the right after you turn on Clark St. You will want to prep the house and the basement.

2:00

3:00

4:00

## Working with the Work Week View

The Work Week View Calendar displayed below provides you with details about the appointments for any given work week. This calendar provides you with a place to enter details about the jobs that will be performed throughout the work week. This view is useful when you are scheduling appointments to make sure you don't accidentally create any scheduling conflicts. To display the Work Week view calendar select the *Work Week* button on the toolbar.

The screenshot shows the Allpro SchedulePro application window. The title bar reads "Allpro SchedulePro". The toolbar includes buttons for Tools, Save, Refresh, Print, Day, Work Week, Week, Month, Timeline, Group By, Resource, Date, No Grouping, and Exit. The "Work Week" button is selected.

The main window displays a calendar for February 2009. The "Date Navigator" on the left shows the current month and year, with a "Today" button. Below it, the "Displayed Resources" section lists:

- Atbc Crew
- Estimates
- Prep Crew
- Wall Crew

The main calendar grid is titled "Prep Crew" and shows appointments for Monday, February 02 through Friday, February 06. The time slots range from 6 AM to 4 PM. The following table summarizes the appointments shown in the calendar:

Day	Appointment Details
Monday, February 02	<p>7:00 - P/ Builders of America: Dave Teager Residence (8914 Main St., Reed City) This job is expected to be done today. If you have any questions the Contractors name is Bill Smith.</p>
Tuesday, February 03	<p>8:00 - P/ Larry Samson Builders: Jones Cabin 248-456-3214 (9823 Kent Blvd, Acme)</p>
Wednesday, Feb 04	<p>12:00 - P/ Selling Bros. Construction: Chris Cross Residence 517-465-4321 (912 Linda Lane, Saint Helen)</p>
Thursday, February 05	<p>8:00 - W/ Best Builders: 1512 w/ 14x26 Cathedral 616-325-4567 616-357-6789 (1512 S. Johnson St.) The job is located on Johnson St. It is the third driveway on the left past Lincoln Rd. You are going to want to prep both the house and the garage. The</p> <p>12:00 - P/ Sharp Construction: Larry Loving Residence 517-243-3467 (1455 Clark St., Owosso) Clark St. is the first road on your left past Tony Rd. when traveling on Highway 115. You will be turning into the</p>
Friday, February 06	<p>8:00 - P/ Brenda Davis: Brenda Davis (789 Pine St., Evart) The drywallers will be there as well so you will have to work around them.</p>

## Working with the Week View

The Week View Calendar displayed below provides you with a brief look at the appointments that are scheduled for any given week. This view is useful when you are scheduling appointments to make sure you don't accidentally create any scheduling conflicts. To display the Week view calendar select the *Week* button on the toolbar.

**Allpro SchedulePro**

Tools Save Refresh Print Day Work Week **Week** Month Timeline Group By: Resource Date No Grouping Exit

**Date Navigator**

February 2009

S	M	T	W	T	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

March 2009

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today

**Displayed Resources**

- Attic Crew
- Estimates
- Prep Crew
- Wall Crew

**Prep Crew**

Monday, February 02

7:00 AM 3:30 PM P/ Builders of America:Dave Teager Residence

Tuesday, February 03

8:00 AM 3:30 PM P/ Larry Samson Builders:Jones Cabin 248-456-

Wednesday, February 04

11:30 AM 4:00 PM P/ Selling Bros. Construction:Chris Cross Reside

Thursday, February 05

8:00 AM 12:00 PM W/ Best Builders:8732 Clark St. 616-325-4567 616-357-6789 (8732

8:00 AM 12:00 PM W/ Best Builders:1512 w/ 14x26 Cathedral 616

1:00 PM 4:30 PM P/ Sharp Construction:Larry Loving Residence 5

Friday, February 06

8:00 AM 3:30 PM P/ Brenda Davis:Brenda Davis (, Evert)

8:00 AM 3:30 PM P/ Brenda Davis:Brenda Davis (789 Pine St., E

Saturday, February 07

Sunday, February 08



## Working with the Timeline View

The Timeline View Calendar displayed below allows you to view your overall schedule to help you determine the best available times to schedule new jobs. This view provides you with an overall picture of your schedule. To display the Timeline view calendar select the Timeline button on the toolbar.

The screenshot shows the Allpro SchedulePro application window. The title bar reads "Allpro SchedulePro". The toolbar contains icons for Tools, Save, Refresh, Print, Day, Work Week, Week, Month, and Timeline. The "Timeline" view is selected. The "Group By:" dropdown is set to "Resource". The main calendar area displays a timeline from Monday, February 02, 2009, to Sunday, February 15, 2009. The calendar is organized into columns for each day. The "Prep Crew" resource is visible on the left side of the calendar. The schedule shows various tasks and resources assigned to specific days, such as "P/Dean", "P/Best B", "P/Brend.", "Ej", "P/Custor", "P/Best B", and "P/Best B".

**Date Navigator**

January 2009

S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

February 2009

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
1	2	3	4	5	6	7

Today

**Displayed Resources**

- Atbc Crew
- Estmates
- Prep Crew
- Wall Crew

## Working with the Schedule Appointment Dialog

The Schedule Appointment Dialog displayed below is where you actually enter appointment information. This form is fully integrated with the data you enter in *Allpro Insulator*. You simply select the Customer/Job you would like to schedule and then select the "Create Auto Subject/Location" button. All of your job location and contact information will automatically be pulled from the Customers form in *Allpro Insulator* so you do not have to reenter all of this information on your calendar. This allows your crews to have all the information they need when you provide them with their calendar. You will also be able to view the full schedule for a specific job from the Customers form. The best part is there is no double entry! This calendar is fully integrated with *Allpro Insulator*!

W/ Best Builders: 1512 w/ 14x26 Cathedral 616-325-4567 616-357-6789

Customer/Job: Best Builders: 1512 w/ 14x26 Cathedral

Create Auto Subject/Location

Subject: W/ Best Builders: 1512 w/ 14x26 Cathedral 616-325-4567 616-357-6789

Location: 1512 S. Johnson St. Label:  None

Start time: 2/5/2009 8:00:00 AM  All day event

End time: 2/5/2009 12:00:00 PM Resource: Prep Crew

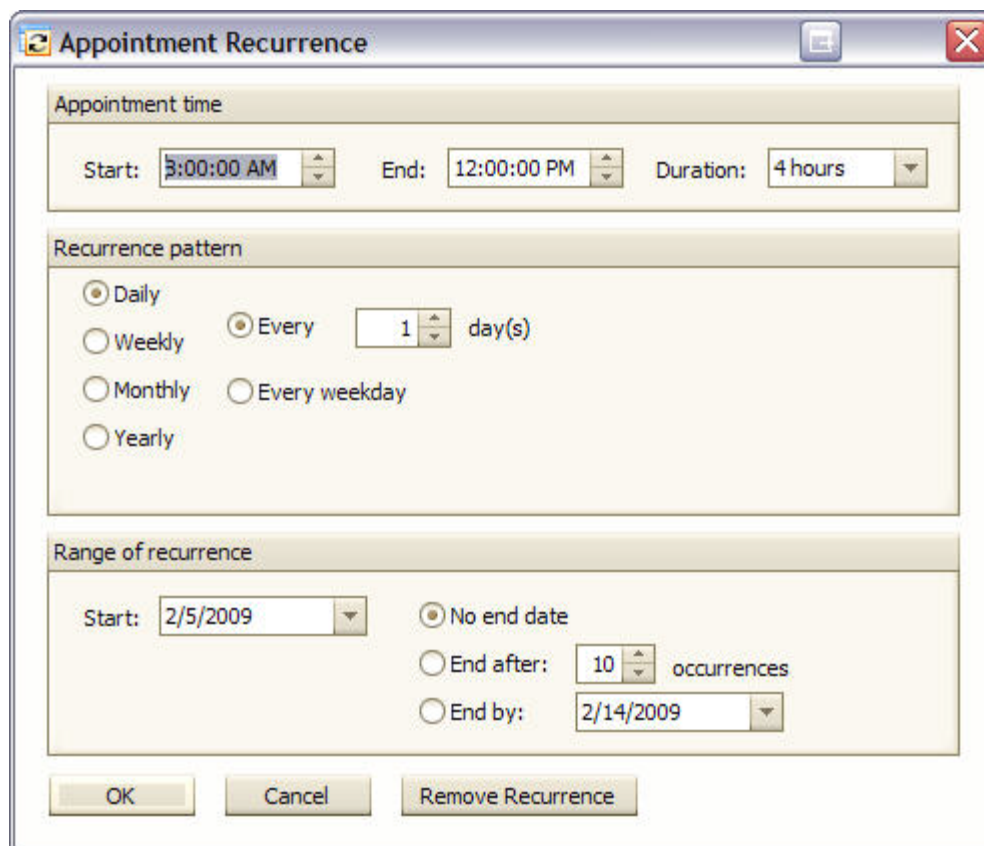
Show time as:  Busy  Reminder

The job is located on Johnson St. It is the thrid driveway on the left past Lincoln Rd. You are going to want to prep both the house and the garage. The property owner's name is Dave Look.

OK Cancel Delete Recurrence

## Working with the Recurring Appointments Dialog

The Recurring Appointments Dialog is displayed when you select the *Recurrence* button from the Appointments Dialog form. This form allows you to create recurring appointments to help organize appointments that appear on a regular basis. For example, you could create a separate calendar Resource for all your monthly bills. You could then create a recurring appointment for each bill's due date so you never forget to pay a bill on time.



The screenshot shows a dialog box titled "Appointment Recurrence" with three main sections: "Appointment time", "Recurrence pattern", and "Range of recurrence".

- Appointment time:** Start: 8:00:00 AM, End: 12:00:00 PM, Duration: 4 hours.
- Recurrence pattern:** Radio buttons for Daily, Weekly, Monthly, and Yearly. The "Every" option is selected with a value of 1 day(s). The "Every weekday" option is also visible.
- Range of recurrence:** Start: 2/5/2009. Radio buttons for "No end date", "End after: 10 occurrences", and "End by: 2/14/2009".

Buttons at the bottom: OK, Cancel, Remove Recurrence.

## Multiple Calendar Functionality

Allpro SchedulePro allows you to manage as many Resources as you require. You can have a separate calendar for each crew, each estimator, your office staff, etc. When working with the calendar you have the option to view only specific calendars, all calendars individually, or you can merge all of the calendars so you can view the full schedule for all resources on one calendar. The calendar below displays the Attic Crew, Estimator, Prep Crew, and Wall Crew all on separate calendars. They are displayed in the Day View so you can easily see what is scheduled for each of your resources for the current day. This multi resource display is available for every view.

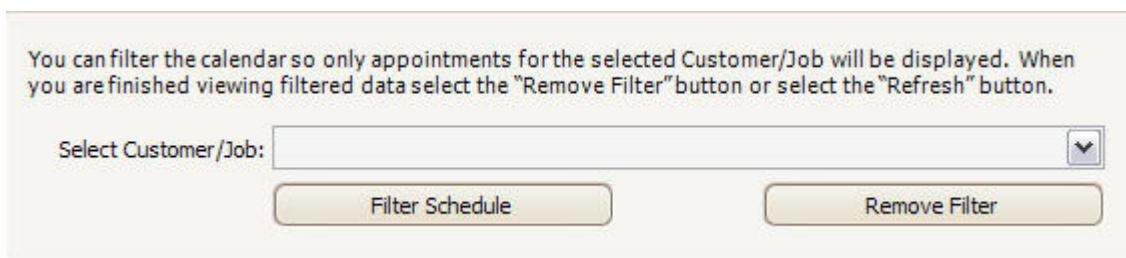
The screenshot displays the Allpro SchedulePro software interface. The window title is "Allpro SchedulePro". The toolbar includes icons for Tools, Save, Refresh, Print, Day, Work Week, Week, Month, Timeline, Group By (Resource, Date, No Grouping), and Exit. The main interface is divided into several sections:

- Date Navigator:** Shows a calendar for February 2009, with the current date (Thursday, February 05) highlighted. Below it is a calendar for March 2009.
- Displayed Resources:** A list of resources with checkboxes:
  - Attic Crew
  - Estimates
  - Prep Crew
  - Wall Crew
- Main Calendar:** A vertical timeline view for Thursday, February 05, 2009. The timeline is divided into columns for different resources:
  - Attic Crew (Yellow):** Shows tasks such as "A/ Best Builders: 1512 w/ 20x28 Great Rm/Split Bedm. 616-325-4567 616-357-6789 (,)" and "A/ Larry Samson Builders: Jones Cabin 248-456-3214 (, Acme)".
  - Estimates (Grey):** Shows events such as "E/ Stop at East Point Builder" and "E/ Meet with Bill Kent".
  - Prep Crew (Green):** Shows tasks such as "P/ Best Builders: 8732 Clark St" and "W/ Best Builders: 1512 w/ 1-4x26 Cathedral 616-325-4567 616-357-6789 (1512 S. Johnson St.)". It also includes detailed notes: "The job is located on Johnson St. It is the third driveway on the left past Lincoln Rd. You are going to want to prep both the house and the garage. The property owner's name is Dave Look." and "P/ Sharp Construction: Larry Loving Residence 517-243-3467 (1455 Clark St., Owosso). Clark St. is the first road on your left past Tony Rd. when traveling on Highway 115. You will be turning into the second driveway on the right after you turn on Clark St. You will want to prep the house and the".
  - Wall Crew (Blue):** Shows a task: "W/ Custom Homes By Randall: Brown Residence (Suite 7, Petoskey)".

## ***Filtering the Schedule by Customer/Job***

*Allpro SchedulePro* allows you to filter the calendar so only appointments for a particular Customer/Job will be displayed.

The Filter panel is displayed when you select the *Filter by Customer/Job* button from the *Tools* toolbar. To create a filter you simply select the Customer/Job you would like to filter by from the dropdown list and then select the *Filter Schedule* button. Then when you view the calendar you will notice that only appointments for the selected Customer/Job will be displayed. This feature is very useful if you are having a hard time finding a Customer/Job on the schedule. You can choose to display the Month view and easily locate the required appointments.



You can filter the calendar so only appointments for the selected Customer/Job will be displayed. When you are finished viewing filtered data select the "Remove Filter" button or select the "Refresh" button.

Select Customer/Job:

To remove the filter and display all of the appointments you can either select the *Remove Filter* button from the Filter panel or you can select the *Refresh* button from the toolbar.

## ***Allpro SchedulePro Summary***

*Allpro SchedulePro* provides you with every feature you need to efficiently maintain an accurate schedule for an unlimited quantity of crews. With the ability to view and print the appointment information in a variety of ways you won't have to waste so much time trying to keep your crews running efficiently. *Allpro SchedulePro* is fully integrated with *Allpro Insulator* so you will never have to double enter your data. Comparable scheduling software can run as much as \$1,000 just for the scheduling functionality but you pay nothing extra. *Allpro SchedulePro* is included with both the QuickBooks and Stand Alone Edition of *Allpro Insulator*.

## Allpro Insulator Tour Summary

As you can see *Allpro Insulator* provides you with all the tools you need to fully automate your office operations. This tour demonstrated what we feel are the most useful features in *Allpro Insulator*. There are however, several more features not mentioned.

We worked side by side with a large insulation contractor for several years developing this software. You are not going to find this kind of functionality with any off the shelf software. *Allpro Insulator* was developed specifically for insulation contractors. We know your business and we know your needs.

If you have any questions about *Allpro Insulator* please don't hesitate to contact us via email or telephone.

For more information about *Allpro Insulator* or to make a purchase please contact:



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