



Using iQduct HD for iOS to export HVAC takeoff and importing to Express Duct by QuoteExpress.

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# 1 Welcome

Welcome to iQduct HD for the iPad. This guide will help you finalize the setup process to get your mobile device ready to input jobs and upload them to the cloud. The iQduct HD program can import these mobile jobs and create the same type of job that would be created within that program, allowing full reporting options and bids. iQduct HD requires QuoteExpress Sheet Metal or Fabshop, version 3.30r2201 or later.

This guide will walk you through the functions of the iQduct HD app. Start with the Home Screen and its points of interest, then to the details for the Settings screen and how to set those defaults. After you are done with the Settings, we'll walk you through the Take-off screen and show you how to create a job. Lastly, you'll be instructed on how to import your job to the PC editions of QuoteExpress.

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## 1.1 System Requirements

This guide is only applicable to the iQduct HD app, in conjunction with Sheet Metal v3.3 or later, and Fabshop 3.3 or later. The app also requires a wifi or 3G/4G connection to upload jobs from the iPad to the cloud. A pc with the aforementioned QuoteExpress products with an internet connection is required to download jobs from the cloud servers.

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## 1.2 Setup

First time users should start with the Settings screen. This will enable you to get started quickly with a proper Company ID and email notification. This is vital to proper upload and download usage of the app. The next few pages will explain how to get started.

## 1.3 Who Should Use It

This app is intended to be use by fabricators, contractors, project managers, field installers, and salespersons.

- **Fabricators:** Use the app to have customers input lists electronically.
- **Project Managers:** Use the app to order duct and pipe from the field.
- **Field installers:** log the duct and pipe installed for the day.
- **Estimators:** Use the app to do a remote takeoff.
- **Sales:** Use the app to get a quick price on custom duct and fittings.

This guide assumes that you have some knowledge of the Quote Express Sheet Metal or Fabshop programs, and general HVAC estimating.

For more information, call Quote Software at 800-813-7020.

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## 1.4 Why iQduct HD?

iQduct HD minimizes delays and reduces conflicts by entering data in real time, letting you closely monitor project changes, and providing near-instant availability of your labor and material costs to project managers and estimators.

The bottom line is iQduct HD lets you add lists of ductwork, fittings, and accessories in the field and have them show up immediately in your office. No more faxing, box tops, or calling the list in.

This User Guide will show you how to use the iOS app to make takeoff lists and how to import them into Express Duct and Fab Shop.

## 2 The Home Screen



Image 2.0

There are four options on the Home Screen:

- **Job List** – This option takes you to the list of jobs that have been created and the ability to create new job.
- **Settings** – This area will let you set the unique ID for your mobile device, input Catalog Item names, import a knowledge file, and other general setup tasks.
- **Website** – A link to our QuoteExpress Estimating Solutions webpage.
- **App Support** – A link to this document if you need some quick information on select topics.

Located on the right side of the screen is small format web browser that shows our mobile website. Click on links here to quickly review some of our other estimating products and our social media sites.

## 3 Settings

The Settings screen should be your first destination in the app. Setting your Unique ID and notification email address is important for getting your jobs to the right people. The following sections will help you get started.

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### 3.1 Global

#### 3.1.1 Company ID – (Required)

This number will be a unique identification (*that you choose*) for your company and the mobile devices you are using. This number is used by iQduct HD to download jobs and your knowledge file (Data) from the cloud. QuoteExpress recommends that you use your main office number as the Company ID for the iQduct HD app.

#### 3.1.2 Username – (Required)

Input your name here to identify who created the job when uploading to the cloud.

#### 3.1.3 Notify Email

This field should contain the email address of the QuoteExpress estimator that will import the job after it is uploaded to the cloud from the mobile device, in order to notify them that a job has been uploaded. Setting the option to **ON** will automatically generate an email from your device to be sent to the address listed.

### 3.1.4 Auto Upload

When set to **ON**, will automatically attempt to upload a job when you close the take-off screen.

### 3.1.5 Sound

This option, when set to **ON**, will cause the app to emit an audible tapping sound when tapping buttons and scrolling wheel menus.

### 3.1.6 Auto Expand Dimensions for Liner

When set to **ON**, exterior duct dimensions will be expanded by the liner thickness to leave the proper free air space.

### 3.1.7 Current Database

Shows the currently loaded database. There are two buttons at the bottom of the screen that will allow you to import a database (knowledge file) to the program. The Download Database button will allow you import a knowledge file that has been uploaded to the cloud from the full PC version of QuoteExpress. Importing this file will give you the duct construction standards and duct components used in your company's PC version. The button labeled Restore Generic Database will replace any current database loaded with the default QuoteExpress database.

The button labeled **Done** at the top of the screen will take you back to the Home Screen, saving any changes you made.

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## 3.2 Company

These fields are an optional set of contact information you may enter. This will be uploaded with all jobs and saved in the notes on the PC version of QuoteExpress. This is YOUR company information, not necessarily the information of the company you are sending the job to.

### 3.3 Catalog

Here is an optional 28 item list of items that can be mapped to the Catalog from your PC version of QuoteExpress. These items are intentionally generic when first installed and do not necessarily reflect items in any QuoteExpress Catalog. These items are also not loaded from any uploaded knowledge file. To customize this list, tap on the desired item in the list. A window will appear allowing you to change the button name (3 characters max) to display on the button in Take-off, and a field for you use to describe the item you intend to use in your jobs. Tap **Save** to insert the newly detailed item into the Catalog list.

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### 3.4 Palette Order

The palette list here reflects how the ductwork palettes are ordered on the Take-off screen. To change the order, simply tap the right side of the colored palette label and drag them into the order you prefer.



## 4 Job List

The Job List is the starting point for creating, editing, and submitting a new job take-off. Any jobs you have already created will show here in the list to the left. The currently loaded job is shown in the Job Name field, with the date it was created to the right, any notes for the job below the name, and the Audit Trail in the lower right will show any items already taken off in the job.

To start a new job: Tap the plus sign (+) at the top center of the screen. This leads you to the Add Job screen. You must add a Job name before you can continue, but that is the only information that is required at this point. You may add a subzone to start with if you wish. The Job ID is generated automatically, and cannot be edited. The Notes field can be used to provide extra details about the job you are creating, and can be seen on the Job List screen

Once you enter the Job name, tap the Create button at the top right of the screen to continue to the Take-off screen. If you wish to cancel the job creation process, just tap the Cancel button at the top left corner. To remove a job from the list, tap the job you wish to delete, then tap the trash can icon at the top of the screen, then tap the red Delete button to remove the job from your device.

## 5 The Take-Off Screen (TKO)

The Take-Off Screen is where you will select all the duct, fittings, and equipment that you want to get priced or quoted. No pricing is generated in the app itself. Items will get costs applied once the job is imported to the Quote Express Fabshop or Sheet Metal programs.

To select an item, simply tap the icon in the appropriate palette. Once selected, the item will appear in the Active Item area, where you modify the details of the duct or fitting. To change a dimension, tap the field you would like to change. The keyboard will appear in Single Entry mode, where you would tap the size you want to input.

You do not tap each digit of the number. For example, if you wanted to change the width of a fitting from 24 inches to 12 inches, you would tap the width field and the button **12** , not the buttons for 1 and 2. If you prefer to tap individual digits, select the 10 Key button at the bottom left. Note that after your first item is accepted, dimensions (width, height, diameter) are carried over from the previous item.

At this point you may also change the physical components of the duct or fitting.

Changing a component is simply a matter of tapping the appropriate field and selecting the new component name from the list. The list is determined by the currently loaded Pressure File, which are populated by the Knowledge File you have loaded in the Settings page. Once you have chosen the correct dimensions, components, and quantity, tap the Accept button to save the item to the Audit Trail.

Each item is added subsequently to the list as they are accepted and cannot be modified without first selecting the item, tapping the Edit button, making your changes, and then tapping the yellow Accept button (yellow signifies that you are in the edit mode.)

Once you are finished adding all the items you need to your Audit Trail, tap the Job File button to leave the Take-off screen. If you have the auto-upload function set to ON, then the app will try to upload the job to the QuoteExpress cloud server. If you



do not have the auto-upload function turned on, the app will return to the Job List screen, where you can tap the Upload button at the top to upload the file at any time. If the Notify Email option in Settings is set to ON, the app will open and compose an email for you to send to the appropriate estimator.

Item Note  s01 Code

Job List

Item 1

Vane

Gauge 26

No Liner No Wrap

1 of 0 Del Edit **Accept** 1 Quantity

Joint Galv S & Drive Sealant No Joint Sealant

Seam Snaplock Sealant No Seam Sealant

Angle No Reinforcement Rod No Reinforcement

Hangers 1in x 18ga Galv Strap

Active Item Area

After tapping a new item, the item shows in this area with the component options it will be built and installed with. Once selected, you may tap a dimension field and change any of the dimensions, select a component, or make a change to another style allowed by the pressure file currently loaded. Tapping the **Accept** button enters the item into the Audit Trail with the currently selected components.



Image 5.0.0

### Fitting Palettes

These four areas, the Rectangular, Round, Accessories, and Catalog palettes are populated by the items in each individual pressure file and the respective Accessory file and Catalog. The images in your app may appear differently, based on which knowledge file you currently have loaded. The vertical order of the rectangular, round, and accessory palettes is modified in the Settings page. The Catalog palette is **not** populated from a knowledge file, but instead from the Settings page,



Image 5.0.1

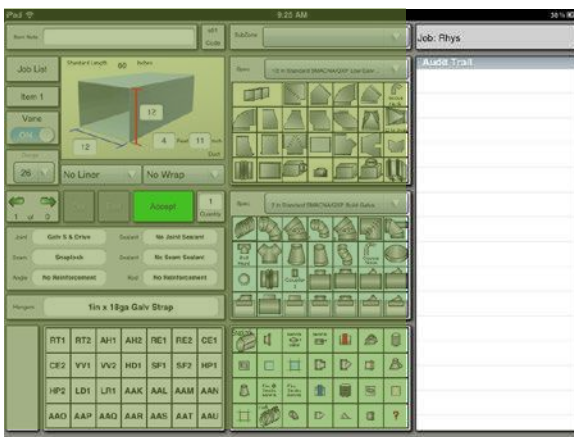


Image 5.0.2

### Audit Trail

After an item is selected and accepted, it is shown here. The items are given a line number and each has its relative data displayed in vertically bifurcated entry.

## 6 Importing to Sheet Metal and Fabshop

Importing to the QuoteExpress Sheet Metal and Fabshop programs on your pc will be very simple once a few setup items are taken care of. Whether the job was uploaded by you, a field tech, or a client, importing the takeoff is fairly quick and painless. Simply create a zone (or job for the Fabshop program), select your default pressure files to start and enter the Take-off screen. Once in TKO, you'll be able to search for any new jobs , select one to import, map any Accessory or Catalog items necessary, and see an audit trail of all the items imported. At that point the zone (or job) is the same in every way as any other job taken off manually. You can return to the Jobfile and run the reports you normally run, or create a new zone and continue inputting items.

Once you have a zone created and entered the TKO screen for that zone, go to the BIM menu at the top of the screen and choose Import iQduct HD – iPad import file.

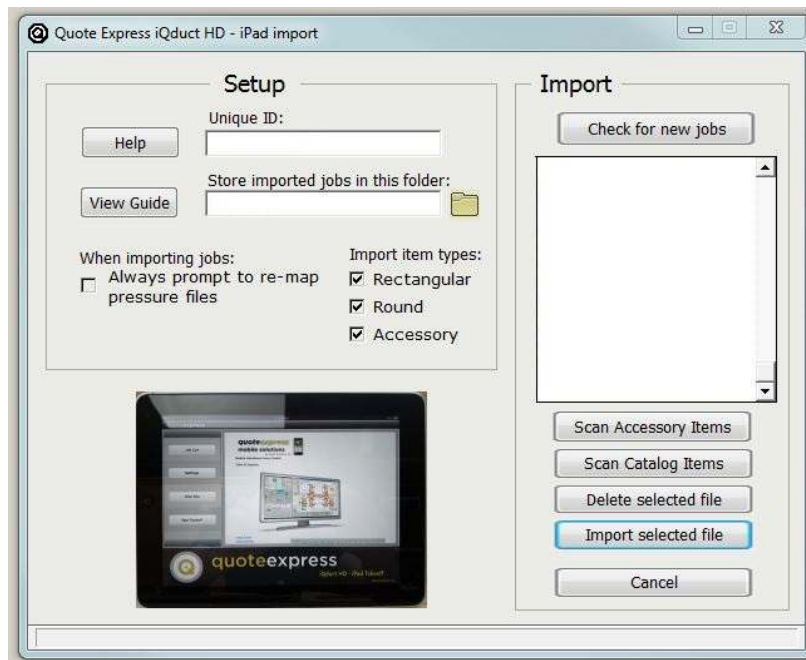


Image 6.0

## 6.1 Setup

### 6.1.1 Choose your Unique ID

The Unique ID you choose here should match the ID used on the job you are trying to import. Most commonly, this is your main office number if the iPad user is an employee with your company. This number rarely changes, but in some circumstances may need to be changed based on who is sending you jobs for import. Always verify this number matches the ID number on upload notice you received.

### 6.1.2 Store Imported Jobs

The location you choose here is where you want QuoteExpress to save the file that it downloads from our cloud servers. It can be any folder of your choosing. The files you download here become needless once they are imported to TKO (unless you need to archive them for some reason), since they are still on the cloud server for 60 days and on the iPad until they are deleted there. All the jobs stored here will show up in the big field to the right, whether or not they have the same ID number as jobs you are currently downloading.

### 6.1.3 When Importing Jobs (Mapping)

The option to always re-map Pressure Files is unchecked by default. If you jobs come from someone using your knowledge files, remapping is mostly unnecessary. However, if you receive jobs from multiple sources that are not using your knowledge file, it would be prudent to have this option selected. When jobs are imported, the program checks to see if the Pressure File used for the items on the iPad has been mapped to one of your Pressure Files. If there is no mapping, it will prompt you to map one. If there is a mapping, it continues on without stopping unless this option is selected.

### 6.1.4 Import Jobs of Type

Choose the type of items you want to import from the jobs you are downloading. You can choose any combination of the three options. Selections are static between jobs. The default is for all three to be checked.



## 6.2 Import

### 6.2.1 Check for New Jobs

Clicking this button tells the program to send a query to the QuoteExpress cloud servers and download any jobs that used the ID number in the ID field on the left. Jobs that get downloaded appear in the box below the button. Jobs continue to appear here as long as they are stored in the folder noted on the left and have the ID number listed on the left.

### 6.2.2 Job List

The list of jobs located here have an ID number that matches the ID listed in the field to the left and have been downloaded from the QuoteExpress cloud server to the location listed in field to the left. Click on a job here to select it, and then choose an option listed below the list.

### 6.2.3 Scan Accessory Items

This function allows you to search the job for any accessory items that might have been taken off in the mobile app.

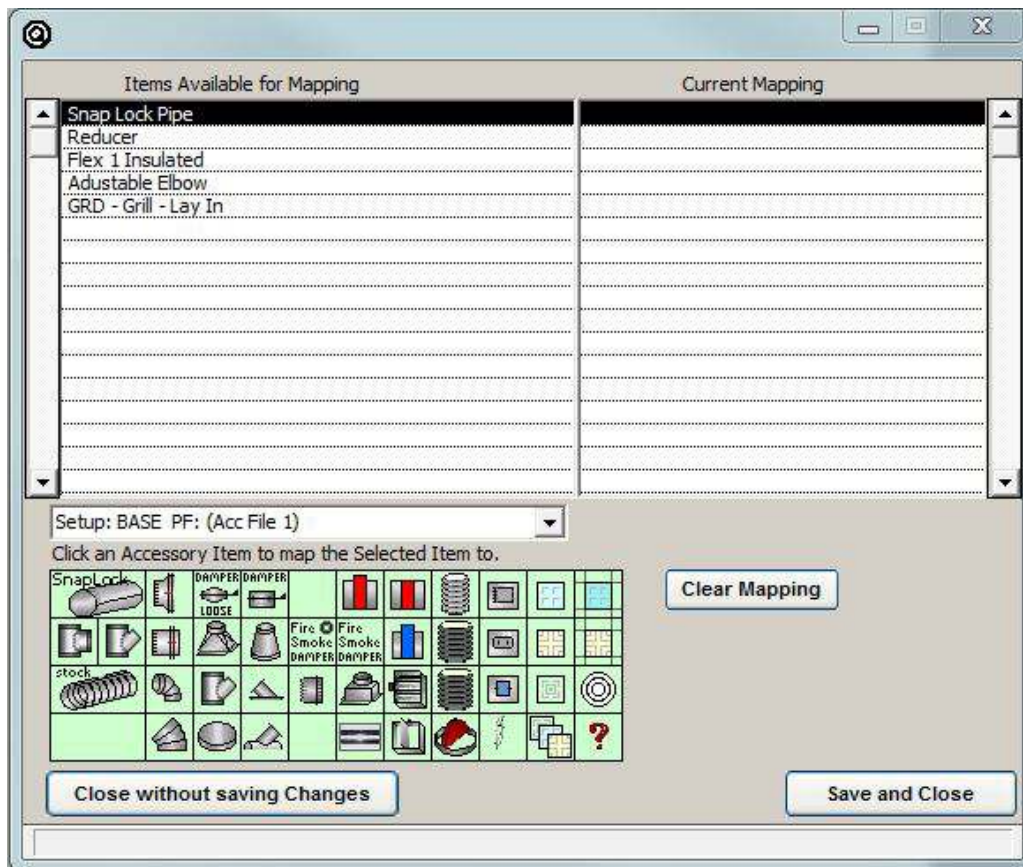


Image 6.2.3

Accessories included in the imported job show on the list to the left. On Image 5.0.4, the example has five Accessory items to import and map (Snap Lock pipe, Reducer, Flex 1 Insulated, Adjustable Elbow, GRD – Grill – Lay In). Since your Accessory file may contain different items or placement of items, we must map the items listed to items in the Accessory palette shown at the bottom of the screen.

To create a mapping, click on the item listed on the left, and then click on the item in the palette to create a mapping to. You may map multiple items in the list to one item on the palette. For example, if there are multiple items that are slightly different types of flexible duct, but you only have one flexible duct type in your palette, you can map all of them to the one you have.

Item names that have been mapped through previous jobs will be shown with their mappings already listed on the right. You can clear the mapping by highlighting the item to be changed and then clicking on the **Clear Mapping** button in the lower area. When finished mapping all items, click **Save and Close** button in the lower right.

#### 6.2.4 Scan Catalog Items

This function allows you to search the job for any catalog items that might have been taken off in the mobile app.

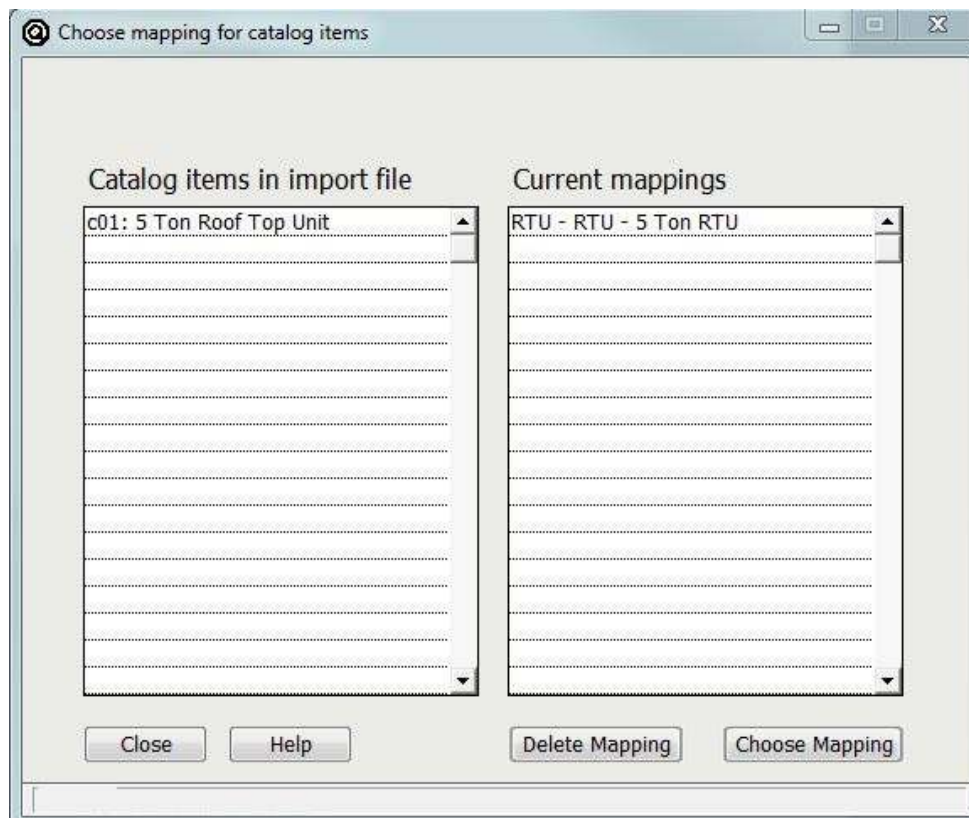


Image 6.2.4





To map an item, choose the item in the imported file from the left column and then click on the **Choose Mapping** button at the bottom. The catalog will appear and then you may choose the category, then group, and then the item that will be mapped. You will see the item appear in the list to the right. You may continue mapping items or delete mappings (with the **Delete Mapping** button). Items that have been mapped in previous jobs will show up having a mapping when this screen opens.

#### 6.2.5 Delete Selected File

This function deletes the file from your storage location, but does not affect the job file saved in the cloud or the original job on the mobile device. The **Check for new jobs** button will download the job again if it is still stored on the cloud (usually, jobs are retained for 30-60 days).

#### 6.2.6 Import Selected File

This function attempts to import all the items included in the iQduct HD file. It will build the list in the Audit Trail just as if you had taken off the items yourself manually.

If an item has no mapping or cannot be imported for some reason, it will show in a text file that will appear (if you choose to) with iQduct HD file item number, name, and reason for not being imported.

## 7 What's Next?

At this point your job is a full QuoteExpress Sheet Metal or Fabshop job. You can continue adding mobile jobs to the current one or start new projects. You can also now run the same reports you would have run if this job was taken off on your PC.

To become more efficient with your estimating programs, call us for more web-based training, classroom training, or face to face training at your office or ours. Ask about BIM imports and CAD-connect for streamlining work with your CAD department and our Plasma-connect to send jobs right to your plasma table.

Let us know if you have any questions at 541-684-4665 or log on to [www.quotesoft.com](http://www.quotesoft.com) anytime.