iQuote Pro 7.0

What's new Guide

Apice Consulting S.r.l.

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1. Introduction

This guide lists new features in iQuote Pro 7.0 software.

Note: throughout this guide wherever you will find the following icon

you can click on it to view a video demonstration of the new feature.

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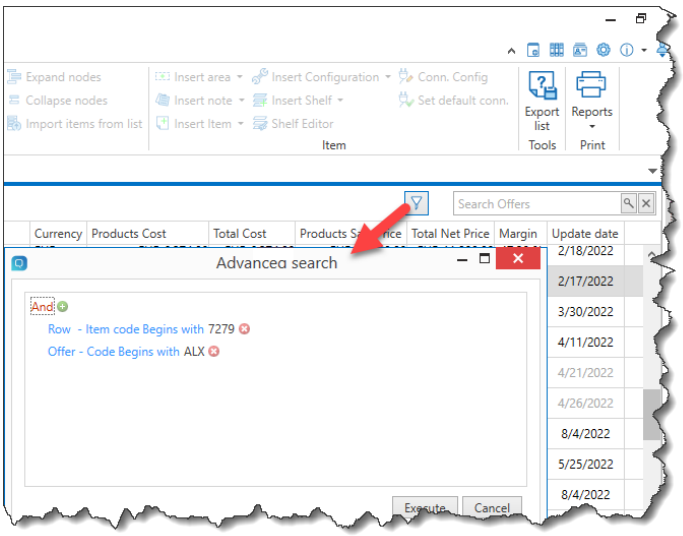
2. iQuoteWin

2.1. Advanced offer search and library search for technical data

Demo Video

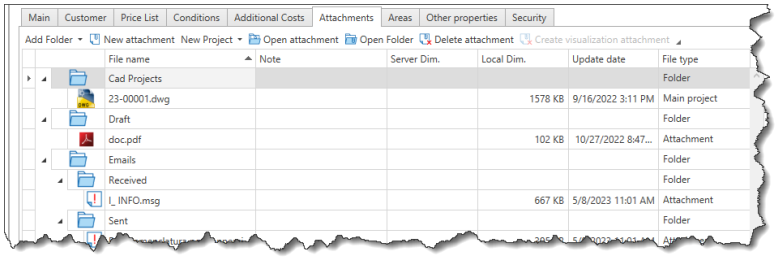
It is now possible to carry out advanced searches on the offer list, in order to more easily identify offers that reflect certain criteria. It is possible to filter for all the general fields of the offers and for all the fields of the offer lines, i.e. of the products included in the offer.
For example to search for which offer contains a certain item.
In the item library it is possible to search using information related to connections as a filter.



2.2. Organizing attachments into folders

Demo Video

Now you can organize the attachment list into folders and subfolders. This novelty allows you to put order in cases of offers with a large number of attached documents. However, the organization in folders remains a virtual and not a physical arrangement. This means that user visually sees attachments divided into folders, but physically files remain in the offer's work folder: so attachments with the same name are not allowed, even if arranged in different folders.



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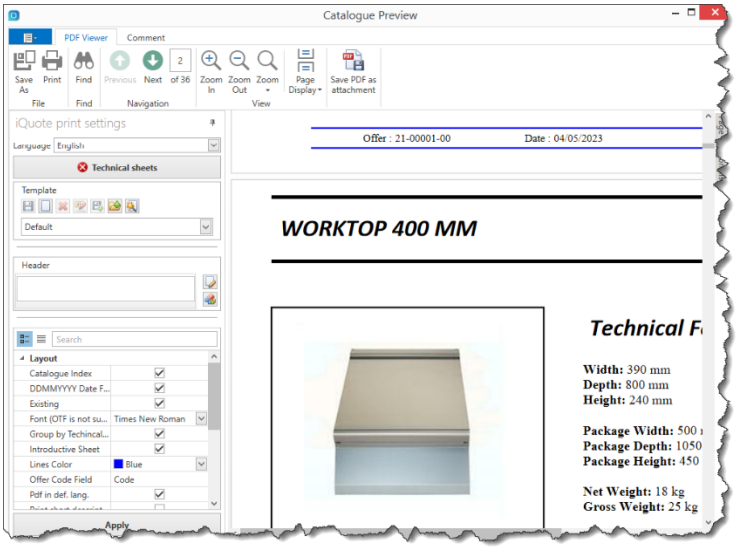
2.3. Print Catalog and Sales Analysis Renewed

Demo Video

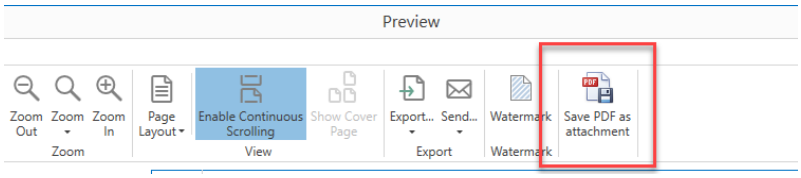
The layouts of the Print Catalog and Print Sales Analysis windows have been renewed and now present the management of templates and print settings directly within a command palette at the side of the print preview, as was already the case for the Print Offer.
Two new settings have also been added to the Print Catalog: the first to be able to exclude the grouping of the technical data sheets and the second to be able to activate the indication, directly in the technical data sheet, of the position number and the belonging area.
Quick shortcuts have also been introduced in the datasheet selection window to facilitate the selection, creation and replacement of datasheets.



2.4. Storage of the offer in PDF as an attachment

Demo Video

A new function has been introduced in the Print Offer window allowing to store the PDF version of the offer in the attachments.



A file name linked to the offer and review code is automatically proposed; if an attachment with the same name is already present, it is possible to choose whether to overwrite or not.

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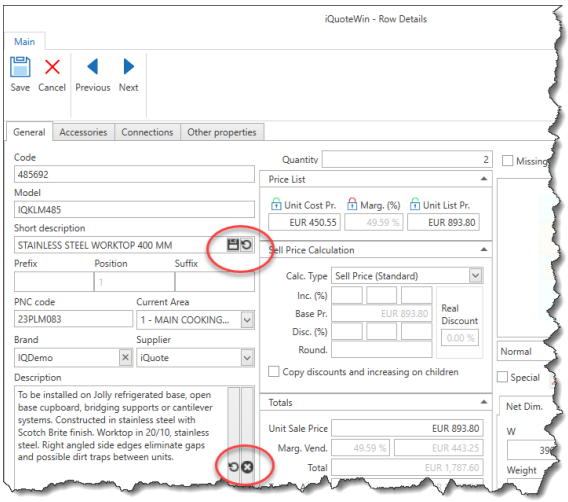
2.5. Descriptions management in personal language

Demo Video

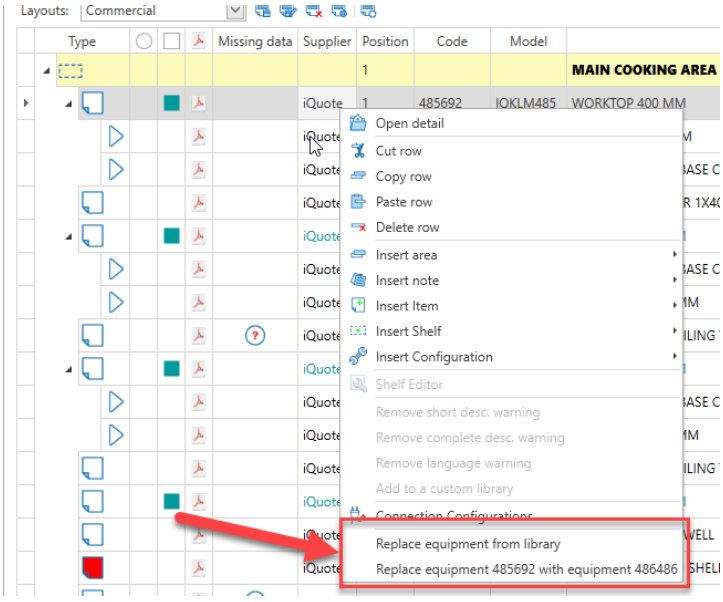
Starting from this version, user can memorize an alternative description for standard products in the manufacturers' price list. This is an exception to the rule that manufacturers' libraries cannot be modified. The stored alternative descriptions will not be altered by the normal liveupdate process. A short and a full alternative description can be entered for each language offered. This allows the user to make up for any errors/deficiencies in the product description or the lack of a description in the desired language. A particular user right allows the administrator to enable this functionality.



2.6. Item replacement

Demo Video

It is now possible to choose to replace an item on offer with an item taken from the library. The substitution is equivalent to the cancellation of the previous item and the insertion of the new one. The only properties that are kept are location and quantity. If the offer is linked to a CAD or Revit project, if the command is executed in iQuoteCAD/iQuote Revit, the CAD/BIM symbol is also automatically replaced, while if the command is executed in iQuoteWin, when the project is opened a discrepancy is reported, that have to be resolved manually.



The offer lines containing products declared by manufacturer as "out of production" are now highlighted in a different colour and, if the information is available, their replacement with a suggested code is proposed. The command allows you to automatically replace the obsolete item with the new one, without having to look for it in the library.

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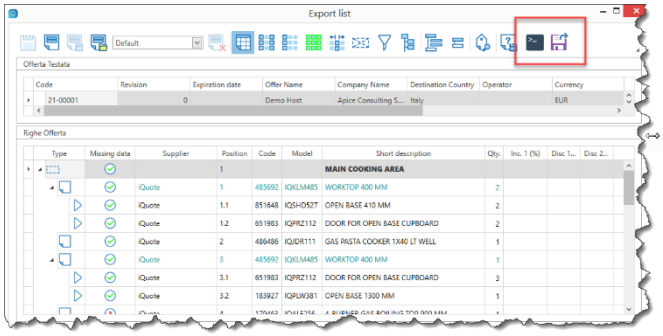
2.7. Offer export

Demo Video

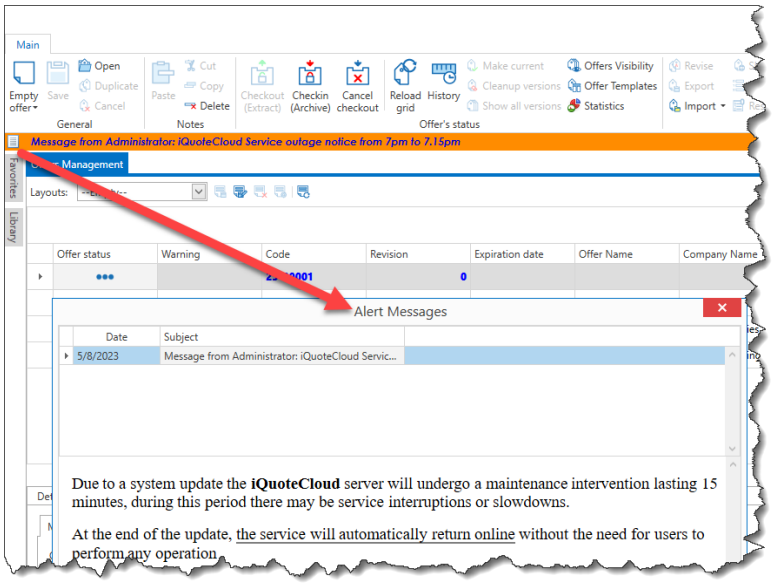
The offer export command has been improved, introducing new features: today it is also possible to export the offer header information in a separate or in a single file. You can also choose whether or not to include column headers. Finally, it is possible to set the execution of a customized command which is executed at the end of the export, for example to execute a third-party software, which takes care of importing the generated file into other programs, like an ERP.



2.8. Service messaging

Demo Video

A new message bar may appear on the iQuoteWin home screen. These are service messages, typically notifications of suspension of the service or information on the status of the server and more. These messages can be “by system", i.e. sent directly from Apice Consulting, or "local", i.e. sent by the administrator of the iQuote server. In case there are several messages at the same time, it is possible to open a display window to be able to look at the complete list.



2.9. Various

Demo Video

Other new features introduced in the 7.0 release:

- Enter favorites directly in a specific area
- Export list: possibility to export columns not containing information anyway

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- Export list: column with the name of the connection setup symbol has been added
- Option added to include/exclude special items from offer recalculation
- New column Offer Margin without additional costs, to have a margin calculated including only offered products
- New Windows 11 theme styles added (light and dark)
- All software migrated to Microsoft .net Framework 4.8

3. iQuoteCAD

3.1. AutoCAD 2024

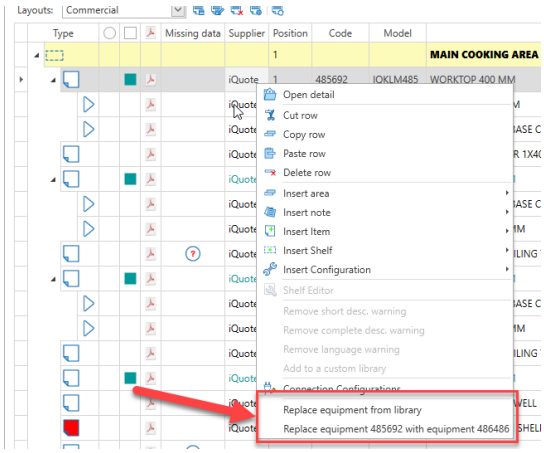
Support for AutoCAD 2024 and iQuoteCAD 2024 OEM has been introduced with iQuote Pro version 7.0. Now you can take advantage of all benefits of the new CAD platform.

Note: due to ongoing technology development, as well as Autodesk policies, iQuoteCAD compatibility is limited to the current version in addition to the previous 3 ones. For this reason, starting with this release, AutoCAD 2020 is no longer supported.

3.2. Item replacement

Demo Video

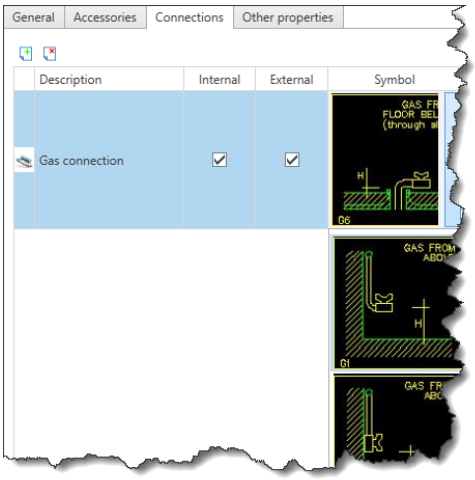
The command, similarly to what was looked at point 2.6, allows the replacement of the CAD block and the offer line with an alternative item chosen from the library or, in the case of replacement of an obsolete item, proposed by the system on the basis of the information received from the manufacturer.



3.3. Management of customized connection symbols

Demo Video

From this version administrator can introduce new connection installation symbols or hide system symbols that are never used.



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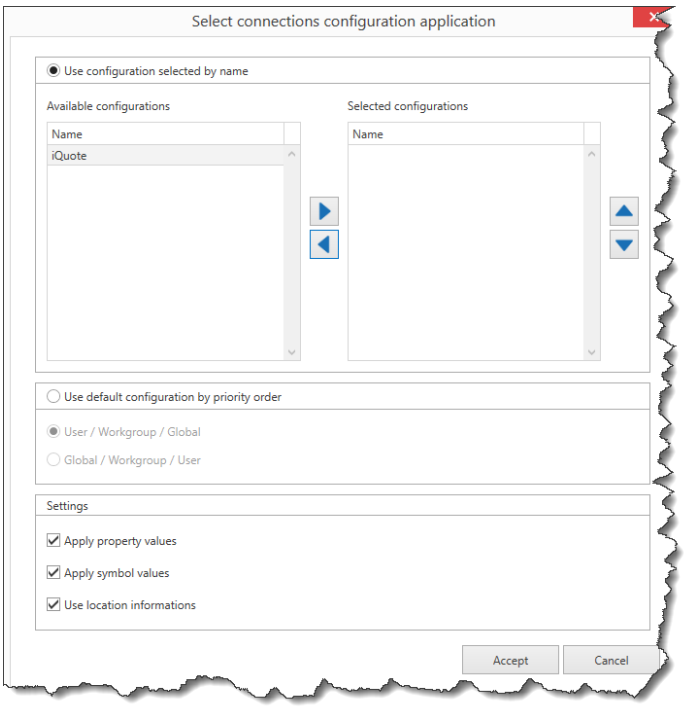
3.4. Mass loading of connection configuration by name

Demo Video

It is now possible to massively load the connection configuration for an entire project, indicating the names of the configurations to be loaded.



3.5. Various

Demo Video

Other innovations introduced in release 7.0:

- Locking the scale of paper space viewports
- Behaviour of Copy Mode and Selection Style buttons in the toolbar changed: they are now On/Off type buttons

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4. iQuoteRevit

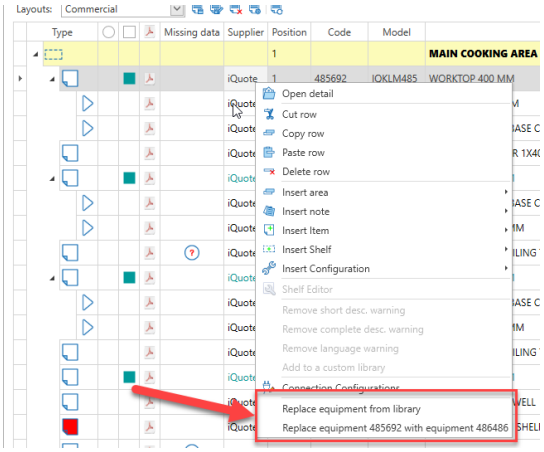
4.1. Revit 2024

iQuote Pro version 7.0 introduces support for Revit 2024 and iQuote for Revit 2024. Now you can take full advantage of the new BIM platform.

4.2. Item replacement

Demo Video

The command allows the replacement of the CAD block and the offer line with an alternative item chosen from the library or, in the case of replacement of an obsolete item, proposed by the system on the basis of the information received from the manufacturer.



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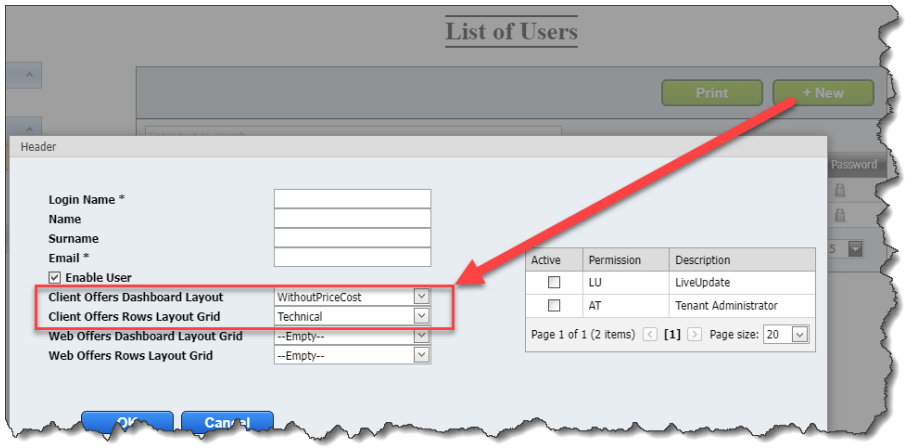
5. iQuoteLiveupdate

- Added the ability to recover the password lost during login

6. iQuote Administration

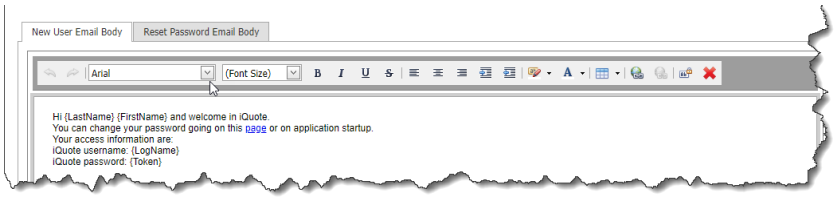
6.1. Grid layout setup for new users

Administrator can, when creating a new user, pre-assign a layout for the offer list grid and for the offer editing grid. So as to standardize software appearance on first launch.



6.2. E-mail message customization

Administrator can now customize text of the e-mail messages that are sent by the system when creating a new user or when resetting password. In both cases it is also possible for the administrator to attach a file to the e-mail, for example to attach a small introductory guide when creating a new user.



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Demo Video

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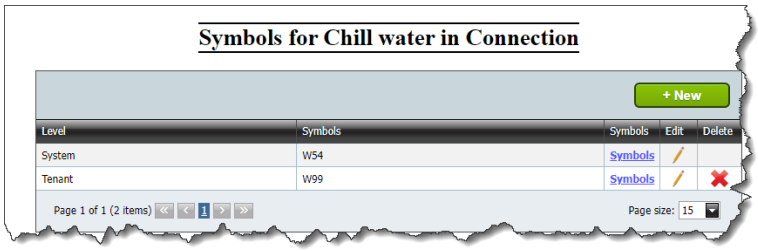

6.4. Various

- New option to force users to choose a strong password
- Access right to offer statistics is integrated into "SP" permission to print sales analysis too
- Management of users and price lists within the workgroup properties modification page has been separated
- New user permission to grant/deny print templates editing