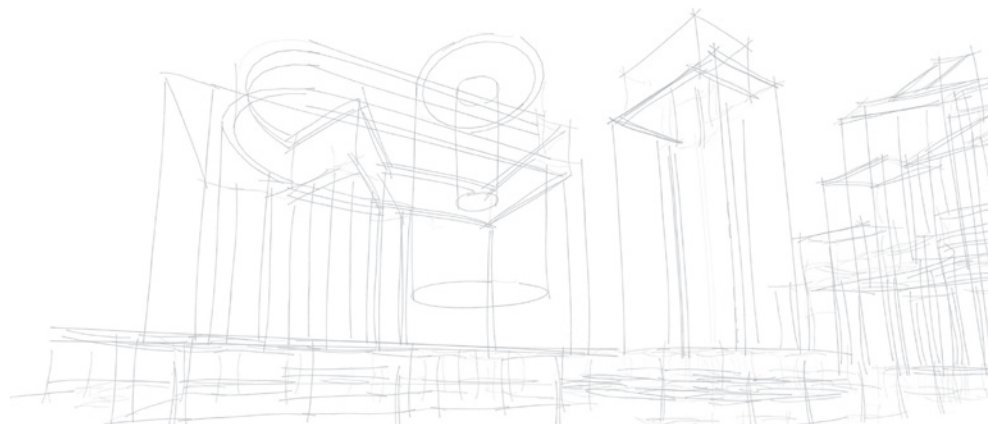# USER MANUAL

Hi-Quote

Air conditioning solutions

HITACHI

ANDROID / iOS

1. INTRODUCTION

Hitachi's Hi –quote app simplifies managing your sales appointments; you will be able to generate projects very easily and you will have the option of preparing a personalised estimate from a mobile device or tablet.
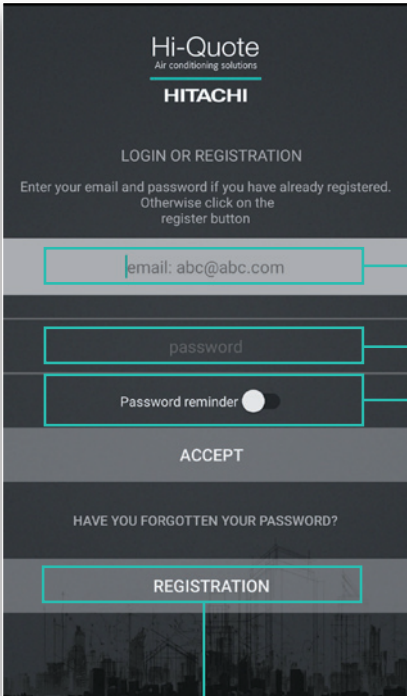
This user manual will help you to understand the key processes and features of the estimate management tool Hi-Quote Android/iOS.

The sections you will find in the app are:

▸ Registration process
▸ Home screen
▸ Settings screen
▸ Clients section
▸ Appointments section
▸ Estimate generator section
▸ 3D Reality section

HITACHI
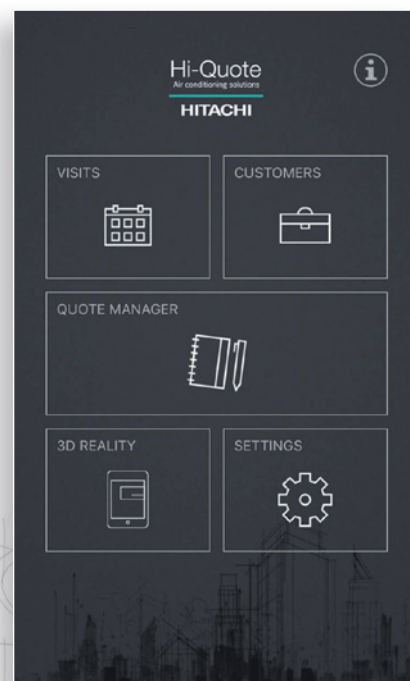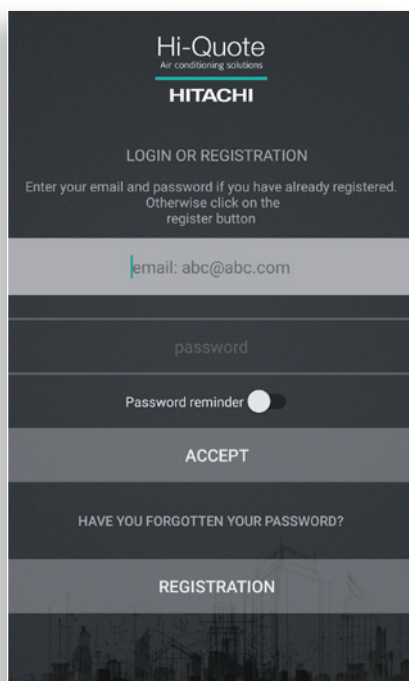
2. REGISTRATION PROCESS

This is the first screen that will appear when you open the app. In order to use the tool, you must register. In the *Darse de alta* (register) icon, you must enter a series of mandatory data in order to complete the registration process.

If you close the app and then open it again, you will have to log in with the email and password you entered when registering. Another option would be to remember the password with a tab so that when you open the app, you will be automatically logged in.

Login details in the installer with the option to remember the password for future uses

Fill in these fields when signing in for the first time

3. HOME SECTION

This section includes a shortcut to all of the features of the app. Using the 5 function buttons, you will be able to access each section of the app (appointments, clients, estimate manager, 3D reality, information and settings) and an information area.

3.1 INFORMATION AREA

This section includes information about the apps, such as:

ⓘ General information.

ⓘ The user manual.

✉ Email address for sending questions and suggestions related to the tool.

f Facebook and Twitter links.
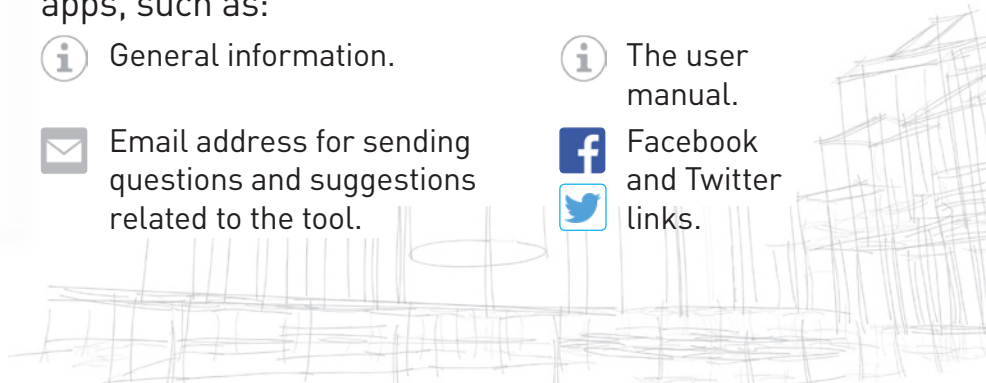
4. CLIENTS SECTION

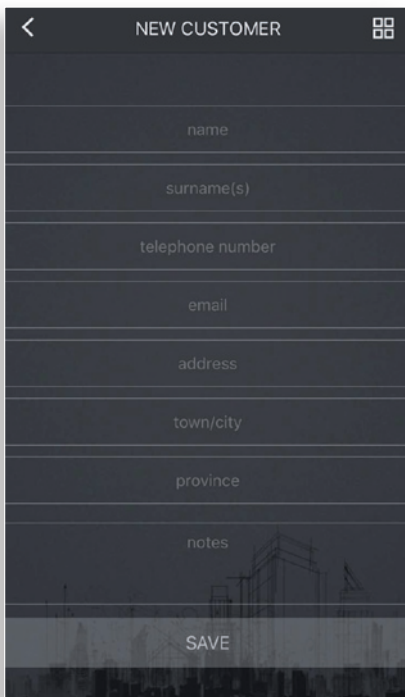This section will be the base of every estimate, as this is where users will create and manage their clients. This section consists of two subsections; one for registering new clients and another for managing them (view and edit existing clients).

4.1 CREATE CLIENTS

In this section you can register new clients. In order to do this, enter the client's details and tap save client.

When entering the client's address, it must be entered in a way that allows it to be automatically completed. This means that as addresses are entered they will be automatically completed via a connection to Google and you must select the last suggested address.

4.2 VIEW AND EDIT CLIENTS

This section includes the list of clients that you have registered and will be displayed in file format with their name, phone number and email address. You can tap the phone icon to directly call the client.

If you wish to view the client's full details, simply tap the file and go to a screen with the client's full details.
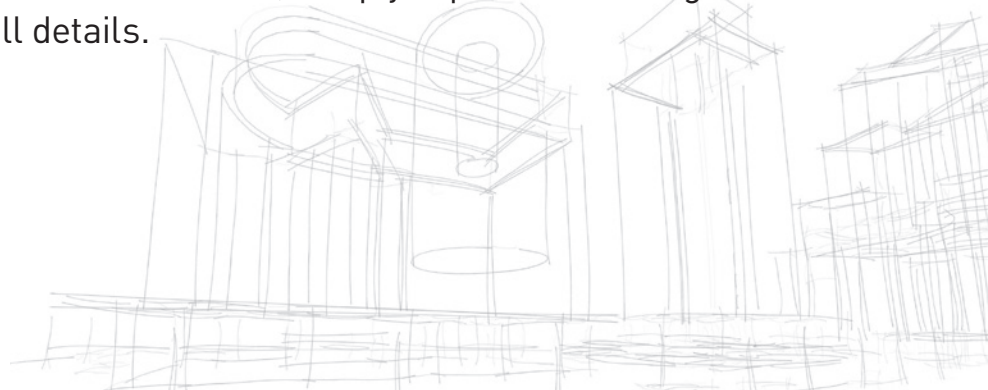
In order to edit or delete a client, swipe the file from right to left to reveal 2 buttons that allow you to edit the client's details or delete them.
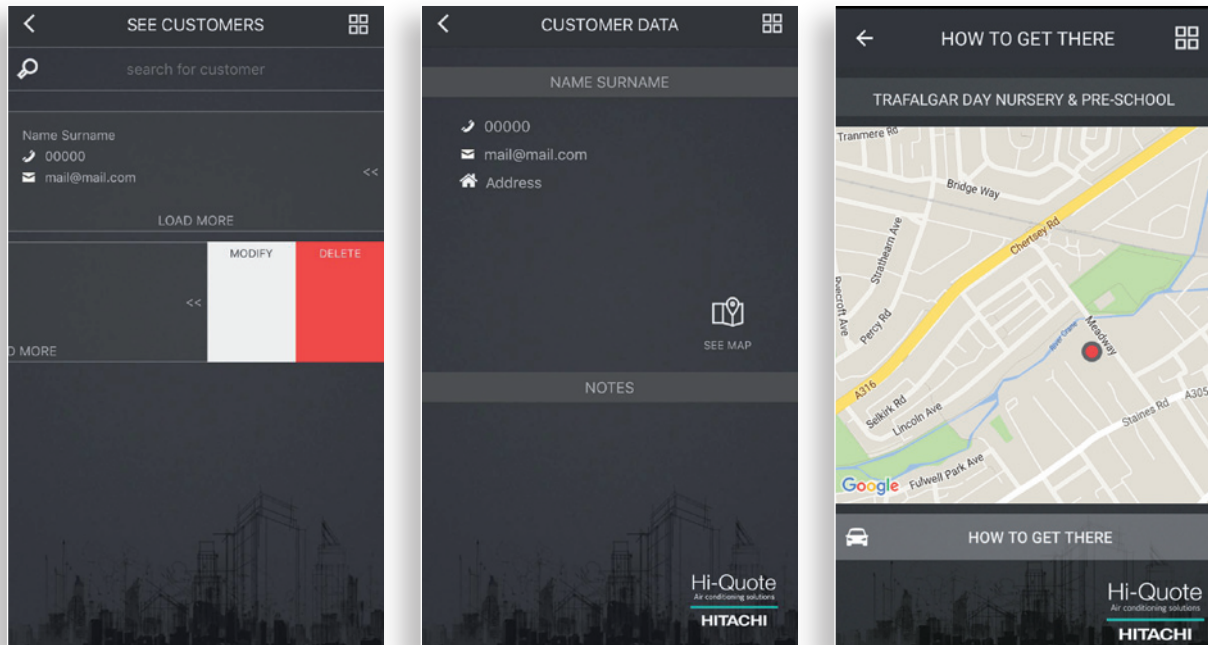
Each client has a file showing all of the details entered. In addition, you can also view the client's location on a map. This tool will allow you to plot the route from your location to the client's location, by marking it on the map.

5. APPOINTMENTS SECTION

In this section you can create, view and edit the appointments whenever you wish.

5.1 CREATE APPOINTMENT

In order to create an appointment, first you must select the client type:

▶ *Cliente nuevo* (new client): Fill in the form in order to create the client (point 4.1), save it and select the date and time in order to create the appointment.

▶ *Cliente existente* (existing client): Select the client from the list displayed on the device. After selecting the client, select the date and time of the appointment.
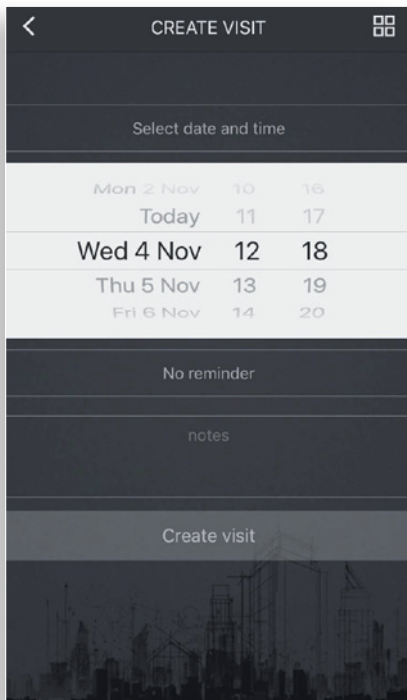
Date and time picker:

After selecting a client, you must select the date and time of the appointment. This picker will be the usual Android or iOS picker.

It will also show the previous reminder, which will trigger the device to show a warning. You can also write notes about the appointment.

After entering all of the details, save the appointment and it will appear in 5.2 (*VER VISITAS* - VIEW APPOINTMENTS).
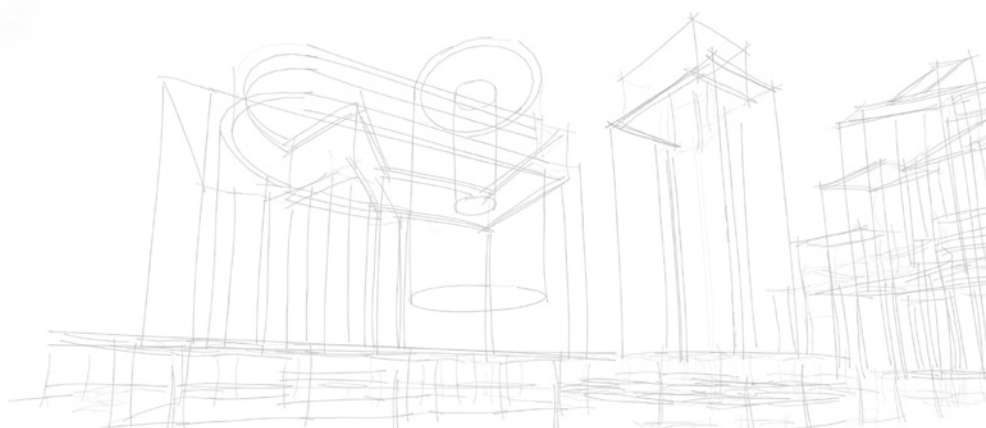
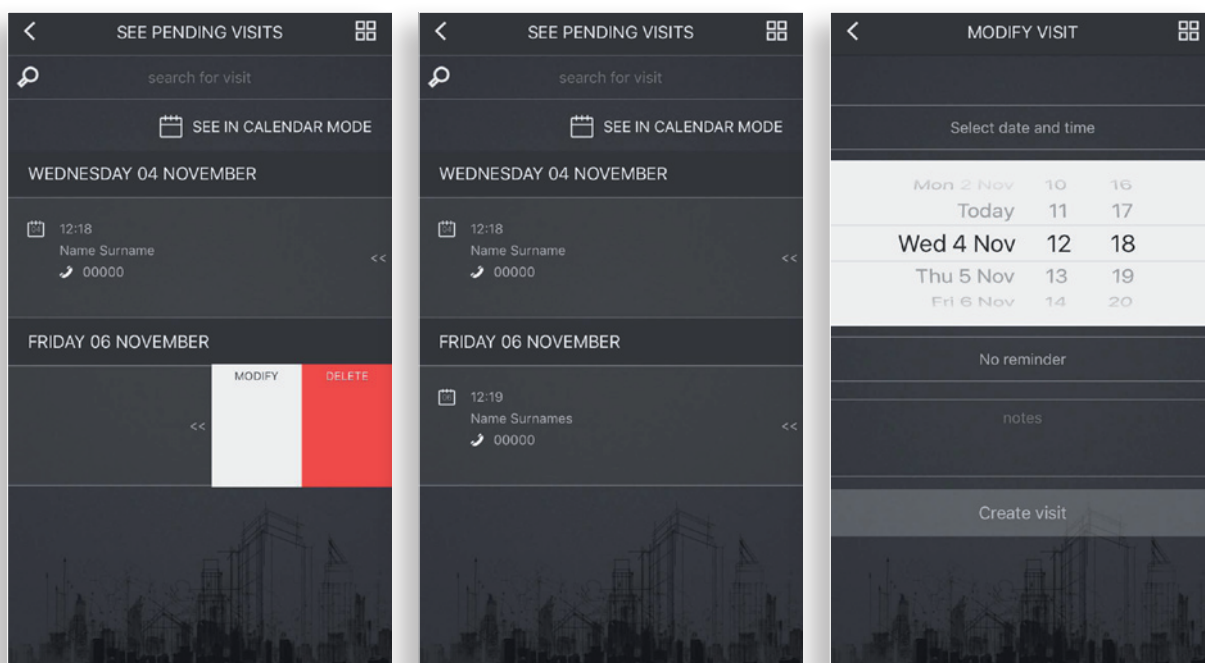## 5.2 VIEW, EDIT AND DELETE APPOINTMENTS
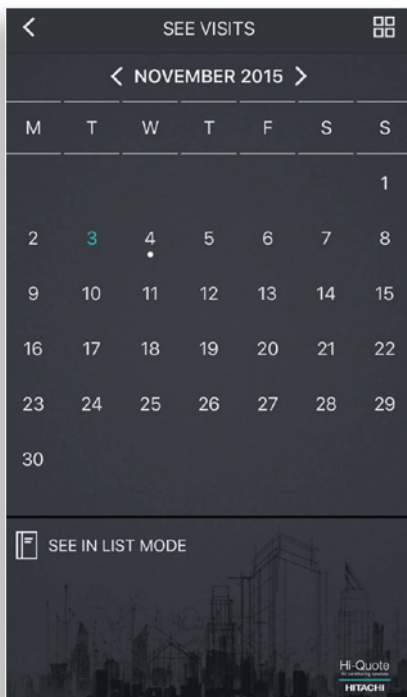
In this section you can view the appointments created in section 5.1. There are two displays:

Calendar display:

The calendar will specify, with a dot, the days on which you have scheduled an appointment with the client. In addition, the current day will be shown in red. Tapping this day will show the details of the day.

HITACHI

In order to view the appointments you have on a certain day, tap the selected day and all of the appointments for that day will appear in chronological order. In this screen you can edit or delete each visit, swiping the cell of each visit from right to left, as shown below. If you wish to edit it, choose the date again.

List view:
This view shows a list of the appointments in chronological order. It includes a shortcut to the calendar view and an appointments search engine. In this screen you can also edit or delete each visit, swiping the cell of each visit from right to left, as shown below.

Edit appointment:
when you select Modificar visita (edit appointment), the sections that you can edit will appear. After making the changes, save them by tapping *GUARDAR CAMBIOS* (save changes).
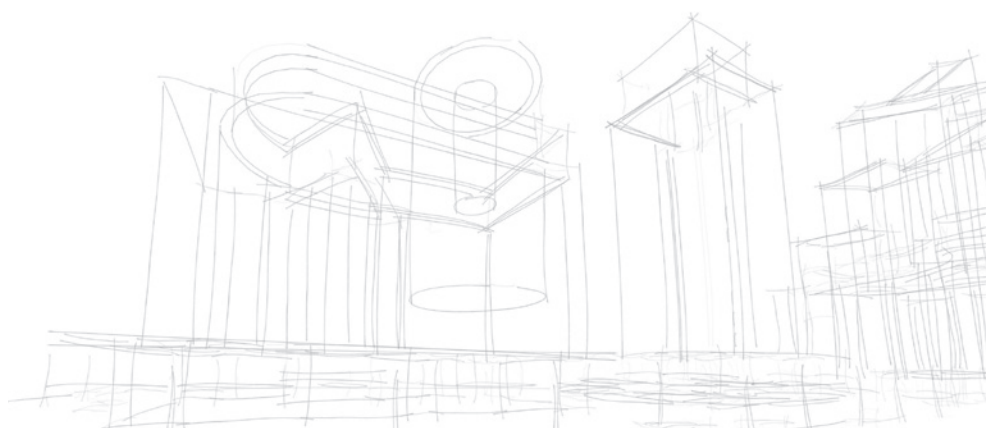
6. SETTINGS SECTION
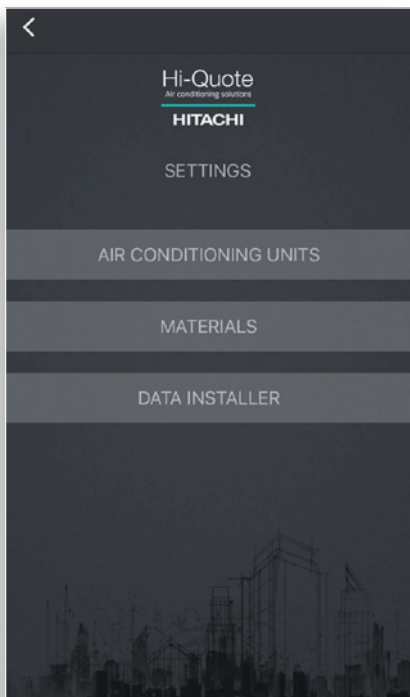
In this section you can change your details, the ones that will appear on the estimates, view and edit new materials and view the units available in the app. The settings screen appears as follows:
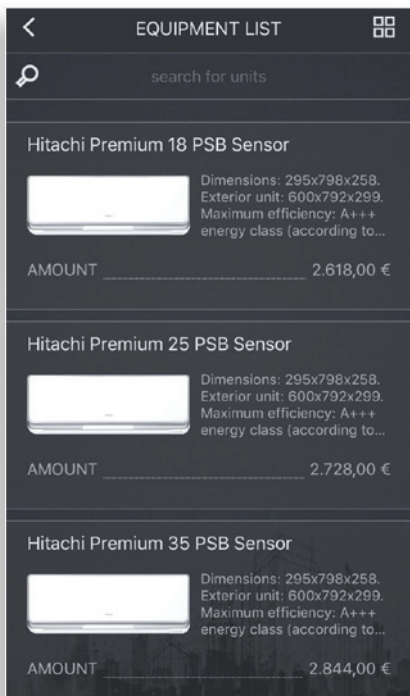
6.1 UNITS

This section shows the list of units and a search engine so that you can check the units loaded in the app. This list shows the amount, image and name of the unit, along with a brief description. In order to access the unit details, simply tap the cell and you will be able to see all of the features of the unit.
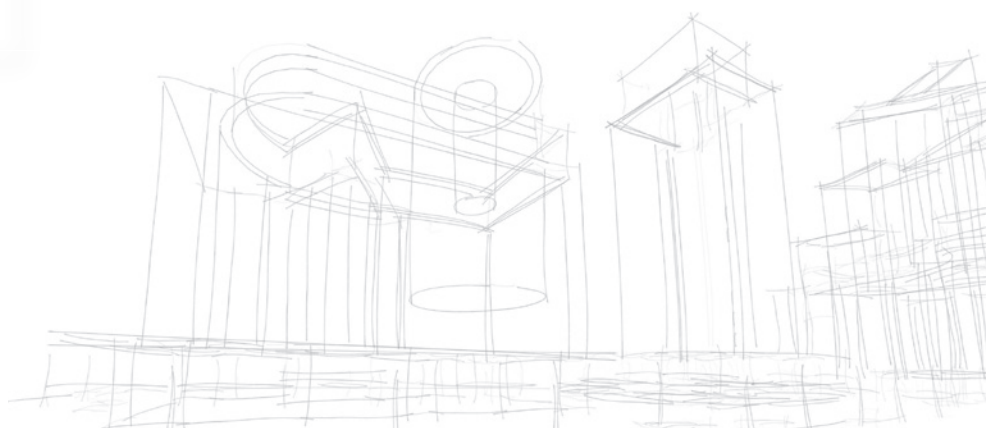
6.2 MATERIALS

This section lists all of the materials registered and includes a search engine by material type.

Materials can be registered by selecting *AÑADIR MATERIAL* (add material). A pop-up window is displayed with the details to complete:

> ▶ Material name (text)
> ▶ Unit price (€)
> ▶ Units (linear metres, hours, m2, etc.)
> ▶ Discount that could apply (%)

After completing the pop-up, tap OK and the new material will be generated.

The material list contains the following properties of each material:

1. It can be edited.
2. It can be deleted by swiping the cell to the left, revealing these options.
3. Tapping the material expands the cell, where you can edit the discount applicable to the material.

6.3 INSTALLER DETAILS
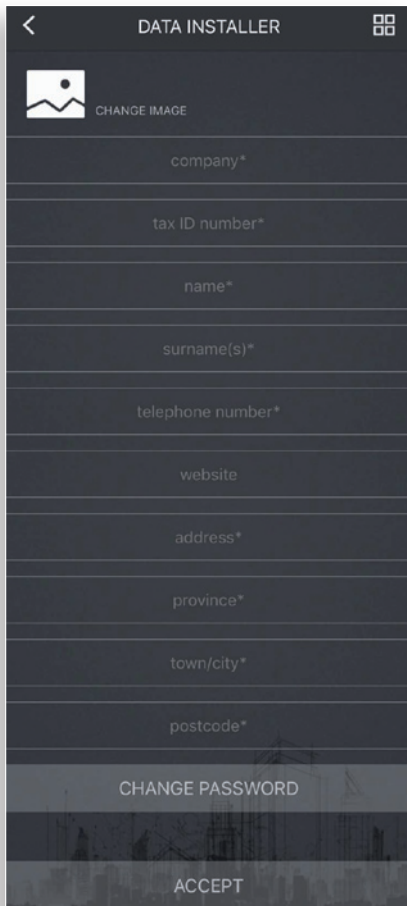
In this section you can view and edit all of the data you require (phone number, tax number, password, etc.) using the form that you completed when setting up the app.

The data that can be edited will appear in a list, which once edited will be updated by tapping GUARDAR DATOS (save data) at the bottom of the screen.

7. 3D REALITY SECTION

This section adds significant value to the tool. You will be able to superimpose a Hitachi unit in the room using 3D reality. In order to do this:
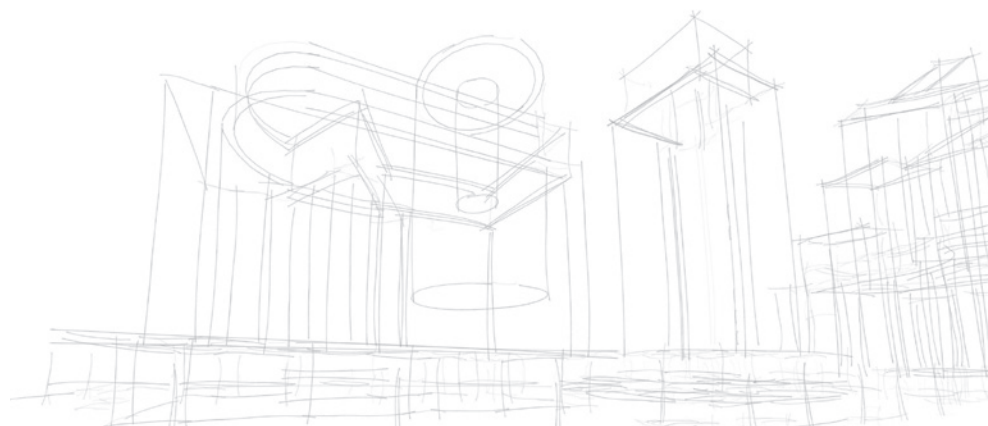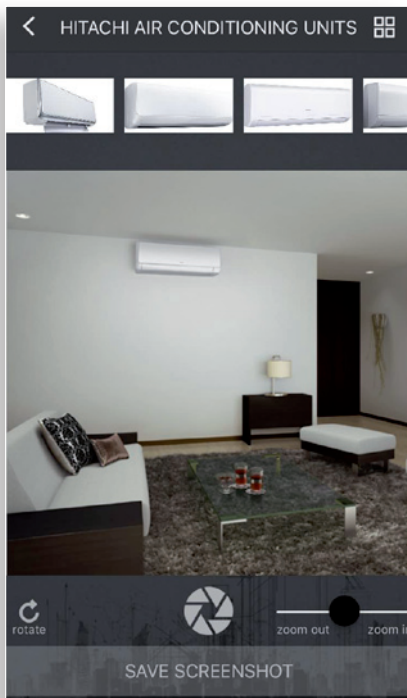
▸ Take a picture of the area in which you wish to place the unit and it will go directly to the 3D screen.

▸ After taking the picture you can select the chosen unit (from all units) in the carousel at the top of the screen by tapping it.

▸ You can also move the unit around the screen by dragging it with your finger.

▸ Rotate it (bottom left button) to switch between the 3 positions of the unit (side left, side right and front).

▸ Resize it so that it fits in its actual size.

After the unit has been placed correctly, you can save the capture on the mobile device's film reel.

In the estimate manager this feature will include the picture taken in the estimate.

8. ESTIMATE GENERATOR SECTION

This is one of the most important sections in the app. In this section you can manage your estimates, view them, edit them, accept them, reject them, create them and send them.

8.1 VIEW AND EDIT ESTIMATES

This section shows a list of all estimates prepared and their status. The information that will appear is the client's name, phone number, current status of the estimate (Pending, accepted or rejected).
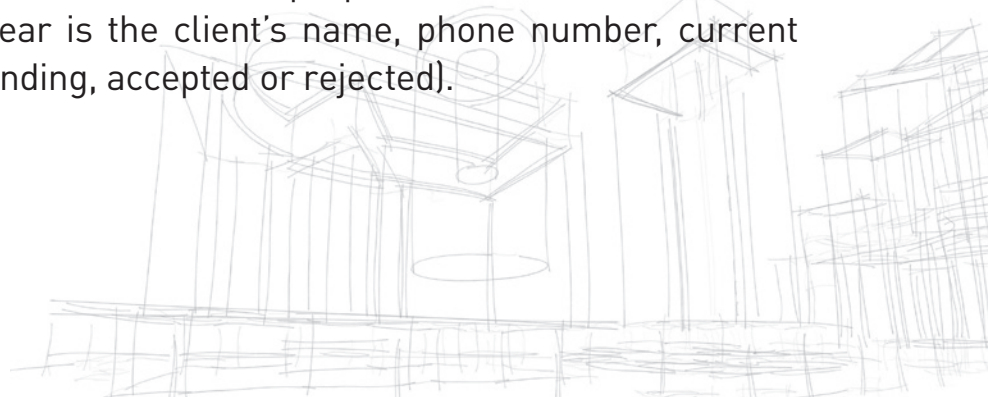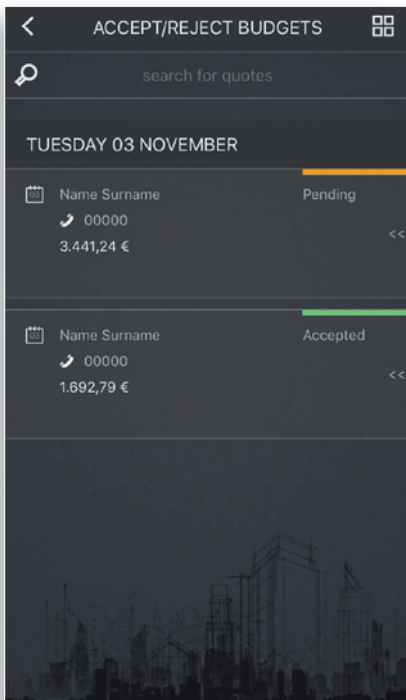
Using the icons under the estimate status icon you can perform a series of actions:

▶ **View the estimate:** to do this, tap the PDF icon in the cell.
▶ **Send the estimate:** to do this, tap the envelope icon in the cell. This opens an email message with the client's address so that the user can send it.
▶ **Edit estimate:** To do this, tap the pencil icon. This opens the estimate creation process, described in section 8.3.
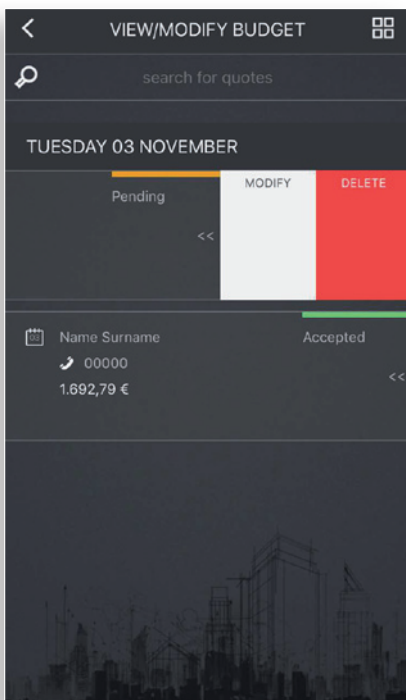
8.2 ACCEPT AND DELETE ESTIMATES

In this section you can assign a status to your budget. There are three options; accept, reject or delete. After selecting the preferred status, it will appear in the *ver/modificar presupuesto* (view/edit estimate) section.

8.3 CREATE ESTIMATES

IIn this section you can create an estimate from your mobile device or tablet. This app is developed to allow each installer to perform a 1x1 or multi installation, according to the client's needs.
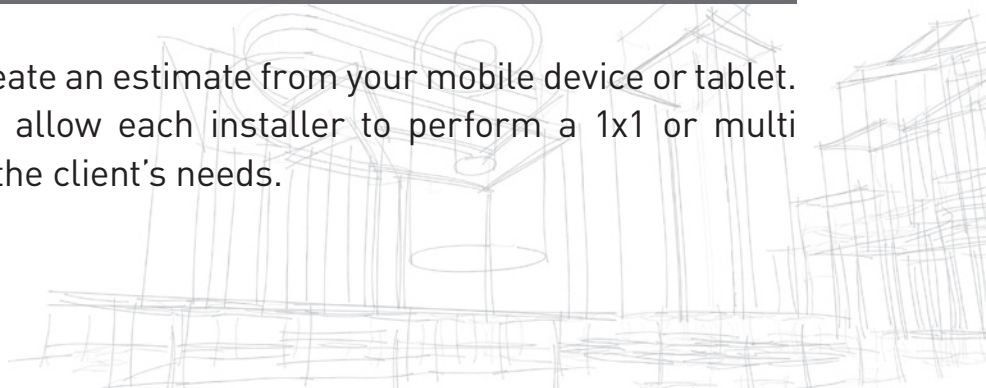
8.3.1 1X1 ESTIMATE

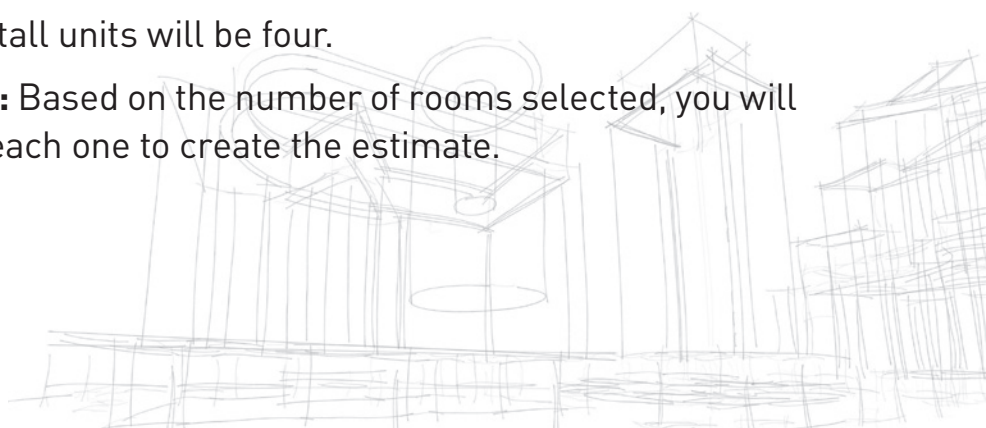The steps to follow in this type of estimate are as follows:

▶ Select the client

▶ **Heating or refrigeration:** The client will be asked for the type of installation.

▶ **Position:** The compass will give you the coordinates.

▶ **Windows:** Depending on whether it is done with insulation, without insulation or if the window is large or standard.

▶ **Area:** Select the room area type using the wheel.

▶ **Power:** This returns the estimated power, which can be changed.

▶ **Models:** Based on the power obtained the app will offer you a series of models that adapt to the installation.

▶ **3D Reality:** You can take a 3D picture to include on the estimate sheet.

▶ **Materials:** Choose the material that will be used in the installation.

▶ **Summary:** You can view the units and materials chosen in the estimate you have prepared.

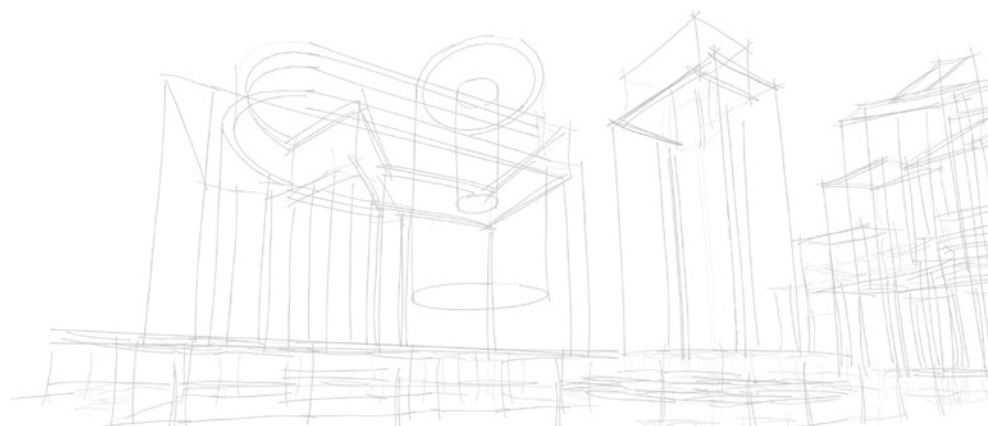▶ **Generate estimate:** The estimate generated will be saved on the device and may be sent directly to the client.

8.3.2 MULTI ESTIMATE

▶ Select the client

▶ **Heating or refrigeration**: Ask the client the purpose of the unit.

▶ **Position:** The compass will give you the coordinates.

▶ **Number of rooms:** The maximum number of rooms in which the installer can install units will be four.

▶ **Select the room:** Based on the number of rooms selected, you will have to choose each one to create the estimate.

▸ **Position:** Select the coordinates using the compass.

▸ **Windows:** Depending on whether it is done with insulation, without insulation or if the window is large or standard.

▸ **Area:** Select the room area type using the wheel.

FOLLOW THE SAME PROCEDURE FOR THE REMAINING ROOMS

▸ **Total power:** You can view the total power in each room divided between the rooms previously selected.

▸ **Multi types:** Here you can select the wall unit type: Basic or Akebono.

▸ **Models:** In basic wall unit or Akebono, using the power returned, the application will display the models you can choose.

▸ **Exterior units:** You can view the list of exterior units.

▸ **3D Reality:** You can take a 3D picture in each room to include on the estimate sheet.

▸ **Materials:** Choose the material that will be used in the installation.

▸ **Summary:** You can view the units and materials chosen in the estimate you have prepared.

▸ **Generate estimate:** The estimate generated will be saved on the device and can be sent directly to the client.

Hi-Quote

Air conditioning solutions

HITACHI

ANDROID / iOS