

Specs

Here are the main **functions and features** you would need to create for a quoting and job management software similar to the MYCS Quotes system for Premier Insulation, based on the web page you are viewing:

Navigation Modules:

- Quotes Management (Overview, search, and manage quotes)
- Jobs Management

The screenshot shows a grid of 20 jobs. Each row contains details such as job number (e.g., PDI3378, PDI3495, PDI3460, PDI3452, PDI3444, PDI3444, PDI3463, PDI3404, PDI3404, PDI3403, PDI3403, PDI3443, PDI3402, PDI3402), quote number (e.g., 3-01159, 3-01151, 3-01132, 3-01137, 3-01105, 3-01104, 3-01103, 3-01122, 3-01130, 3-01111, 3-01123, 3-01117, 3-01115), status (e.g., Confirmed N Schedule, Invoiced, Pending, New Build, High Priority, Pending Review, Pending Review), job type (e.g., ECA, ECA), job date (e.g., Friday, 7 November 2025, Monday, 3 November 2025, Tuesday, 21 October 2025, Thursday, 6 November 2025, Thursday, 2 October 2025, Thursday, 2 October 2025, Thursday, 2 October 2025, Wednesday, 15 October 2025, Tuesday, 21 October 2025, Tuesday, 21 October 2025, Tuesday, 7 October 2025, Thursday, 9 October 2025, Monday, 13 October 2025, Friday, 10 October 2025), customer name (e.g., Liz.Birrell, John.the.Bulder, Kevin.Kelly.Austin, LuxCraft.Homes, Mike.Leth, Sandra.Evett, Emily.Turnball, Clare.Frost, Mike.Leth, 44.Lantana.Road, Sandra.Evett, 44.Lantana.Road, Ned.Semour.Sally, Elevation.Building, Terry.Grant, Terry.Grant), site address (e.g., 2 Peavay Street, Kainawa 573 (ECA 80%, FW 10%), 121 Grey Street, Auckland, 192 Corks Road, Tikipunga, Whangarei, 5 Tuakau Crescent, Milford, 8 Raymond Street, Point Chevalier 1022 (ECA 80%, FW 10%), 114C Western Springs Road, Hornungade 1022 (ECA 50%), 36 Totara Road, Te Atatu Peninsula 0610 (ECA 20%), 44 Lantana Road, Green Bay 0604 (0999999999 + 10% PES), 47 Northgate Road, Kumud 0991 (Hirex Dwelling Glass Works), 30 Elition Crescent, Shannore Bay, Whangaparaoa (REVISED AS PER PLANS 19TH Oct 2025), 109 Fenton St, Avedale 1026 (0999999999 + 10% PES), 12 Ardila Avenue, Harry, Whangaparaoa 0930), sales rep (e.g., Percy.Darrena, Percy.Darrena), discount applied (e.g., \$ 1,002.14, \$ 5,456.47, \$ 3,889.87, \$ 972.47, -200.47 %, \$ 5,630.88, \$ 5,630.88, \$ 3,738.26, \$ 415.36, -387.09 %, \$ 1,323.61, \$ 1,323.61, \$ 2,336.60, \$ 1,786.60, 14.94 %, \$ 5,042.06, \$ 0.00, 0 %, \$ 4,662.70, 26.67 %, \$ 4,169.55, \$ 1,042.39, -128.81 %, \$ 2,756.22, 39.26 %, \$ 4,903.88, \$ 544.88, -362.3 %), total excl. gst (e.g., \$ 116.02), margin (e.g., -335.9 %, 28.83 %, 200.47 %, 34.42 %, 34.42 %, 7.66 %, 14.94 %, 0 %, 26.67 %, 128.81 %, 39.26 %, -362.3 %), installers (e.g., Karen (Lead), Darren S, Karen (Lead), Darren S), vehicle fleet no & rego (e.g., 1. HOME, 2. HOME, 3. HOME, 4. HOME, 5. HOME, 6. HOME, 7. HOME, 8. HOME, 9. HOME, 10. HOME, 11. HOME, 12. HOME, 13. HOME, 14. HOME, 15. HOME, 16. HOME, 17. HOME, 18. HOME, 19. HOME, 20. HOME), invoice created (e.g., 1. HOME, 2. HOME, 3. HOME, 4. HOME, 5. HOME, 6. HOME, 7. HOME, 8. HOME, 9. HOME, 10. HOME, 11. HOME, 12. HOME, 13. HOME, 14. HOME, 15. HOME, 16. HOME, 17. HOME, 18. HOME, 19. HOME, 20. HOME), completion certificate created (e.g., 1. HOME, 2. HOME, 3. HOME, 4. HOME, 5. HOME, 6. HOME, 7. HOME, 8. HOME, 9. HOME, 10. HOME, 11. HOME, 12. HOME, 13. HOME, 14. HOME, 15. HOME, 16. HOME, 17. HOME, 18. HOME, 19. HOME, 20. HOME), and job closed (e.g., 1. HOME, 2. HOME, 3. HOME, 4. HOME, 5. HOME, 6. HOME, 7. HOME, 8. HOME, 9. HOME, 10. HOME, 11. HOME, 12. HOME, 13. HOME, 14. HOME, 15. HOME, 16. HOME, 17. HOME, 18. HOME, 19. HOME, 20. HOME).

The screenshot shows a form for creating a new job. It includes sections for Job Details (Job Number: 3-011166, Job Date: 8/11/2025, Sales Rep: New, Site Address: 12 Ardila Avenue, Harry, Whangaparaoa 0930), Customer Details (Customer Name: Key Contacts: PO Number:), Job Notes (Office View Only:
+ Other Site Contacts:
Product Items Summary (From Quotes):
Quote Items Summary List:
Job File Attachments: Job File01 CHOOSE FILE, Job File02 CHOOSE FILE, Job File03 CHOOSE FILE, Job File04 CHOOSE FILE, Job File05 CHOOSE FILE, Job File06 CHOOSE FILE, Job File07 CHOOSE FILE, Job File08 CHOOSE FILE), Installer Crew Details (Lead Installer: Installer1, Installer2, Installer3, Installer4), and Installation Details (WHERE & HOW TO INSTALL, WHAT TO INSTALL, TOTAL SQUARES REQUIRED, TOTAL BALES REQUIRED, BALES TAKEN OUT, INSTALLER RETURN, BALES LEFT ON SITE, RETURN TO WAREHOUSE, WHERE & HOW TO INSTALL, WHAT TO INSTALL, TOTAL SQUARES REQUIRED, TOTAL BALES REQUIRED).

- Job Calendars (Scheduling)

- Accidents, Incidents, Near Misses Logging

Accidents, Incident, Near Miss (Admin View)

Action	Created By	Date	Type of Report	Project/Site	Decl. Advised?	Decl. Advised Date	Injured Persons
[VIEW]	Eileen.Hurley	12/02/2021	Accident / Incident	49E Swanson Road	NO		
[VIEW]	Eileen.Hurley	23/11/2020	Accident / Incident	1/12 Moau Avenue, Parakai	NO		
[VIEW]	Eileen.Hurley	3/11/2020	Accident / Incident	503 Whangaparaoa	NO		
[VIEW]	Eileen.Hurley	3/11/2020	Near Miss		NO		
[VIEW]	Eileen.Hurley	9/10/2020	Near Miss		NO		
[VIEW]	Eileen.Hurley	11/09/2020	Accident / Incident	49 Sunline Avenue	NO		
[VIEW]	Eileen.Hurley	26/06/2020	Near Miss		NO		

Displaying 7 records.

New Accidents, Incidents, Near Miss

Select Required Form

Near Miss Accident / Incident

Near Miss

Name: Eileen.Hurley Date of Near Miss: 2021/02/21

Event / Circumstance description:

What could be done to prevent or avoid this happening again?

Signed by

Signed by Employer: Sign Off Signed by Employee: Sign Off

Notes

Notes:

- Insulation Assessments

Views	Insulation Assessment						Result
Insulation Assessment	Action	Inspection Date	Assessor's Name	Customer	Site Address		
VIEW	EDIT	POD PASS RESULT	10/09/2023	Percy Darabia	Cody McClelland	3 CULLINGWOOD ROAD, Waitakere 2123	Pass
VIEW	EDIT	POD PASS RESULT	10/09/2023	Percy Darabia	Shuk Xuan Cheng	1/14 Stanfield Street, Sunnynills 2010 (90%)	Pass
VIEW	EDIT	POD PASS RESULT	20/08/2023	Percy Darabia	Dong Young Kim	7 Stires Parkway, Takapuni Auckland	Pass
VIEW	EDIT	POD PASS RESULT	3/08/2023	Percy Darabia	Hawtis Kaledmen	62 Waipani Road, Te Atatu Peninsula 0610	Pass
VIEW	EDIT	POD PASS RESULT	10/12/2023	Percy Darabia	Zane Hooper	17 Eynes Street, Henderson 612	Pass
VIEW	EDIT	POD PASS RESULT	20/08/2024	Percy Darabia	Oceania	VILLA 6, 9 Melrose Drive, Warkworth	Pass
VIEW	EDIT	POD PASS RESULT	26/08/2024	Percy Darabia	Ben Webster	211 School Road, Kingland 0610	Pass
VIEW	EDIT	POD PASS RESULT	4/09/2024	Percy Darabia	Ivan Foyala	218 Hibiscus Coast Highway, Orewa 0931	Pass
VIEW	EDIT	POD PASS RESULT	6/09/2024	Jae Andrews	Valerie McGinn	231 Don Buck Road, Heslop, Auckland 614	Pass
VIEW	EDIT	POD PASS RESULT	6/09/2024	Percy Darabia	Spencer Hendshaw	Unit 201, 3 Tasman Ave, Mt Albert	Pass
VIEW	EDIT	POD PASS RESULT	6/09/2024	Percy Darabia	Lucy Lui	22 Stokes	Pass
VIEW	EDIT	POD PASS RESULT	12/11/2023	Percy Darabia	Peter George Jepson	94 Bellwood Avenue/Hount Eden, Auckland 1024	Pass
VIEW	EDIT	POD PASS RESULT	10/10/2023	Percy Darabia	Jengkil Yun	14b Nile Rd, Milford	Pass
VIEW	EDIT	POD PASS RESULT	24/09/2023	Dan Sena	Barfoot & Thompson Whangaparaoa	54 Tihi Road, Manly, Whangaparaoa 0930	Pass
VIEW	EDIT	POD PASS RESULT	18/07/2023	Dan Sena	Xi Gao	36A Riverpark Crescent, Henderson 0610 (90% OFF)	Pass
VIEW	EDIT	POD PASS RESULT	10/07/2023	Percy Darabia	Bradley Don	32A ARTHURAGE ROAD, Westfield 9990	Pass
VIEW	EDIT	POD PASS RESULT	26/06/2023	Percy Darabia	Among Group	11 Westpark drive, West Harbor, AKL	Pass
VIEW	EDIT	POD PASS RESULT	12/06/2023	Percy Darabia	Simon Garner	10/34 Walkers Place , Walkers 0994	Pass
VIEW	EDIT	POD PASS RESULT	24/05/2023	Las Warsuvithana	WYSE CONSTRUCTION LIMITED	Unit 3 2c Valley Road, Mt Eden	Pass
VIEW	EDIT	POD PASS RESULT	18/05/2023	Dan Sena	ROC BUILD LIMITED	171A Calvert Road, Haslev, Auckland *** Remaining Underfloor***	Pass
VIEW	EDIT	POD PASS RESULT	7/03/2023	Percy Darabia	Sasha Peterson	20 Lilburn Street, Warkworth 0910	Pass
VIEW	EDIT	POD PASS RESULT	1/03/2023	Dan Sena	Nazemir Rufat	14 Troy Place, Glendowie, Auckland 1071	Pass
VIEW	EDIT	POD PASS RESULT	1/03/2023	Las Warsuvithana	Carters Homemakers	26C, Mary Road, Howick Eden, Auckland	Pass
VIEW	EDIT	POD PASS RESULT	27/01/2023	Percy Darabia	Andy the builder	4/43 Wallace Rd, Papatoetoe	Pass
VIEW	EDIT	POD PASS RESULT	2/01/2022	Las Warsuvithana	A Bamster & MRS Baintry	12 Childrens Road, Rangiwhata	Pass
VIEW	EDIT	POD PASS RESULT	3/01/2022	Dan Sena	Iron Bridge Property Management	7 Lenham Lane, Haslev, Auckland 0614 (EARTHWOOL R3.6 100mm)	Pass
VIEW	EDIT	POD PASS RESULT	28/11/2022	Las Warsuvithana	Andy the Builder	72 Willerton Ave New Lynn	Pass
VIEW	EDIT	POD PASS RESULT	15/11/2022	Las Warsuvithana	Verifro Property Management	1212 Whangaparaoa Gulf Harbour/Auckland * Underfloor	Pass
VIEW	EDIT	POD PASS RESULT	13/11/2022	Las Warsuvithana	ASSET MANAGERS LIMITED	94 Kaweka Street, New Lynn	Pass
VIEW	EDIT	POD PASS RESULT	8/11/2022	Las Warsuvithana	Reuben Paterson	242 Glenary Road Glen Eden	Pass

All Apps

Log in

Continuing loan dashboard

Edit Insulation Assessment

NEW INSULATION ASSESSMENT

Assessor Name: Cody McCutcheon

Assessor Mobile: +61421266303

Assessor Email: cody.mccutcheon@maine.edu.au

Customer: Cody McCutcheon

Site Address: 7 DOLLINGWOOD ROAD, Valletta 2123

Rodney Email: rodney@maine.edu.au

Subject: Re: Insulation Assessment

Work Email: cody.mccutcheon@maine.edu.au

Inspection Date: 08/05/2023

Area: EXTERIOR

Description of Insulation: Premier G/W Ceiling Segment R3.6 40mm - Completed - PASS

Pass / Fail: PASS

Description of Work Required: None

Area: INTERNAL WALL

Description of Insulation: Premier Polyester R2.0 Underfloor Blanket - Underfloor - PASS

Pass / Fail: PASS

Description of Work Required: None

Area: EXTERNAL WALL

Description of Insulation: Premier Polyester R2.0 Underfloor Blanket - Underfloor - PASS

Pass / Fail: PASS

Description of Work Required: None

Area: CEILING INSULATION AREA

Description of Insulation: Premier Polyester R2.0 Underfloor Blanket - Underfloor - PASS

Pass / Fail: PASS

Description of Work Required: None

Final Assessment Result:

Overall Result: PASS

Comments/Notes: Ceiling and Underfloor have been installed and are a pass.

SUBMIT REFRESH CANCEL

- Completion Certificates handling

The screenshot shows a list of completion certificates. Each entry includes:

- Site Address:** Various addresses such as UHD 1, 19 Barrerman Road, Western Springs; Lot 2, 24 Deckers Ave; Lot 20, 7 Aherlowe Ave, West Hills; etc.
- Ceiling:** Premier Glazing K1.2 Ceiling Segments 27mm, Premier Glazing RT.2 Ceiling Segments 27mm, Premier Glazing K1.2 Ceiling Segments 27mm.
- Walls:** Premier Polyester Wall Slatcover K2.0 90mm, Premier G/F Acoustic Wall Blanket K2.0 90mm.
- Underfloor:** K3.2 Premier Polyester Underfloor Blanket 140mm.
- Builder:** Smart Solutions, SG Construction Solutions LTD, Universal Homes Ltd, etc.
- Signer:** Penny Darlana, Eileen Murray, etc.
- Date:** Various dates from 18/12/2018 to 29/01/2019.

At the top right, there is a search bar labeled "Search Completion Certificates: Select Criteria". Below the grid, there is a "EXECUTE QUERY" button.

Job Details:

- Job Number: 890
- Completion Certificate Details:

 - Site Address: Premier Glazing K1.2 Ceiling Segments 27mm
 - Ceiling: Premier Glazing K1.2 Ceiling Segments 27mm
 - Walls: Premier Polyester Wall Slatcover K2.0 90mm, Premier G/F Acoustic Wall Blanket K2.0 90mm
 - Underfloor: K3.2 Premier Polyester Underfloor Blanket 140mm
 - Builder Name (Please edit if Required): Eileen Murray
 - Date: 29/01/2019

System Columns:

ID	Created	Modified
890	6/1/2024 5:38:41 PM	6/1/2024 4:07:27 PM

- PS3 (Producer Statement) management

All Apps | Loan Management System | Continuing loan dashboard | PS3-827 - MPCs for Premier Insulation Ltd | +

[Log in](#) mycos.co.nz/secure/t/07725/preview.aspx?r=649615bd+1005&back-to=~/505/M102/Tz9/L15/CT3X9wqgAvUsTQnOBKgkjDTHENjQmVY3VvLjAON1gTz2NNTmetTA91Dy/1EExSc20NAQ=+2478508

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My Cloud Solutions Ltd

Premier Insulation Ltd

PREMIER INSULATION

INSULATION • ROOFING • EXTERIOR FINISHES • PLASTERING • PAINTING • CARPENTRY

NEW PS3-14

SEARCH DOWNLOADS ACCIDENTS INCIDENTS HIGH RISERS INSULATION ASSESSMENTS COMPLETION CERTIFICATES PDF

Views

PS3: 827

Job No. 201120 Search PS3 Customer Mike O'Brien Franklin Ltd Old Job

Producer Statement Construction (PS3)

General Construction Work

To BE CONSTRUCTED BY THE PERSON WHO HAS UNDERTAKEN THE BUILDING WORK

Author Name Mike O'Brien

Author Company Premier Insulation West/Holiday

Description of Supply & Install Insulation

Description of Supply & Install Insulation

Performance Standard Work

Performance Standard Work

Site Address Lot 9 299 Victoria Street West, Pakuranga 2120

Building Consent No CC01094214

Registration No

Premier G/W Ceiling Segment P.L.E 45mm

Premier G/W Acoustic Wall Blanket R4.2 90mm

Premier G/W Acoustic Wall Blanket R4.1 140mm

LOT 9 OF 69300

NZSIC Classes HS

I have sighted the above building consent and read the attached conditions of consent and confirm that I have undertaken the building work described above in accordance with the consented plans and specifications. I understand that Council will not open the producer statement, for the purpose of establishing compliance with the above building consent.

Signature (If this field is empty, the Signer Name has not put their signature on their Employee Record)

PEDaralna

Date 21/10/2023

Post Code 2010

Transcription Employee Details

Address Unit 3 184 Hobson Road, Te Matai South, Auckland

Business Premier Insulation West/Holiday

Mobile +64210808081

Fax N/A

Email pms@premierinsulation.co.nz

System Columns

ID	Date Created	Created By	Last Modified	Modified By
827	21/10/2023 10:03:14 AM	Premier Database	21/10/2023 10:03:14 AM	Premier Database

EDIT CREATE PDF ADD SIMILAR DELETE BACK

Dashboards:

- Default dashboard

Quotes Overview

To see Quotes by Customer, Date or Status, use the Quotes Search query. (The results can be exported to Excel). Enter in 1 or more criteria and click on Execute Query to run the query.

To view ALL Quotes, leave all the fields blank.

- Customer Name: To look for Quotes for a specific Customer
- Quote Status: To look for Quotes by Quote No
- Site Address: To look for Quotes by Site Address
- Quote Dates: To look for Quotes by a specific date or a range of dates
- Quotes Status: To look for Quotes by its Status
- Sales Rep: To look for Quotes by Sales Rep
- Job Type: To look for Quotes by Job Type

Quotes Search: Select Criteria

Customer Name:	<input type="text"/>	<input type="button" value="EXECUTE QUERY"/>	<input type="button" value="REFRESH"/>
Site Address:	<input type="text"/>	<input type="button" value="EXECUTE QUERY"/>	<input type="button" value="REFRESH"/>
Quote No:	<input type="text"/>	<input type="button" value="EXECUTE QUERY"/>	<input type="button" value="REFRESH"/>
Quote Date:	<input type="text"/> --ANY--	<input type="button" value="EXECUTE QUERY"/>	<input type="button" value="REFRESH"/>
Quote Status:	<input type="text"/> --ANY--	<input type="button" value="EXECUTE QUERY"/>	<input type="button" value="REFRESH"/>
Sales Rep:	<input type="text"/> --ANY--	<input type="button" value="EXECUTE QUERY"/>	<input type="button" value="REFRESH"/>
Job Type:	<input type="text"/> --ANY--	<input type="button" value="EXECUTE QUERY"/>	<input type="button" value="REFRESH"/>

- Sales reporting/dashboard

Sales Calendar Year to Date (Cross Tab View)

Quota Date	January 2023	February 2023	March 2023	April 2023	May 2023	June 2023	July 2023	August 2023	September 2023	October 2023	November 2023	Total
Sales Rep	Total	Total	Total									
Aiden Kalita	\$12,527.23	\$14,541.45	\$12,481.32	\$12,532.82	\$12,431.32	\$12,049.20	\$20,244.24	\$16,049.20	\$20,244.24	\$16,049.20	\$16,049.20	\$160,526.85
Celina Andruska	\$158,510.15	\$11,284.68	\$20,860.69	\$13,679.19	\$11,967.64	\$18,085.79	\$69.00	\$11,967.64	\$18,085.79	\$11,967.64	\$11,967.64	\$57,857.10
Hatt Hobroff			\$38,426.65	\$13,250.00	\$11,277.12	\$12,329.55	\$17,018.40	\$22,126.59	\$33,526.84	\$31,054.60	\$14,422.12	\$319,382.22
Percy Darabia	\$111,728.01	\$89,181.32	\$172,850.33	\$128,179.00	\$95,956.11	\$136,781.00	\$160,212.33	\$252,092.75	\$202,138.08	\$202,773.45	\$153,121.57	\$1,583,152.57
Saman Yafa	\$29,545.45				\$193.54							\$587.08
Total	\$ 313,609.86	\$ 165,007.66	\$ 456,501.81	\$ 499,003.53	\$ 199,093.84	\$ 205,627.66	\$ 245,657.58	\$ 281,158.65	\$ 258,910.14	\$ 233,828.05	\$ 40,529.84	\$ 3,001,287.82

Sales by Sales Rep (Bar Graph View): Select Criteria

Sales by Month or Year (Cross Tab View): Select Criteria

Sales by Sales Source (Bar Graph View): Select Criteria

Sales "WON" by Sales Source (Bar Graph): Select Criteria

Sales "LOST" by Sales Source (Bar Graph): Select Criteria

Sales "WON" by Sales Source (List): Select Criteria

Sales "LOST" by Sales Source (List): Select Criteria

Quotes Views:

- Quotes (Management View)

The screenshot shows the Quotes Management View. On the left, there's a sidebar with 'Dashboards' (Default Dashboard, Sales Reporting), 'Views' (Quotes (Management View), Quotes Search, Recycle Bin), and 'Jobs'. The main area displays a 'Sales Calendar Year to Date (Cross Tab View)' table:

Sales Rep	January 2025 Total	February 2025 Total	March 2025 Total	April 2025 Total	May 2025 Total	June 2025 Total	July 2025 Total	August 2025 Total	September 2025 Total	October 2025 Total	November 2025 Total	Total
Aiden Kalra	\$32,927.32	\$14,381.43	\$42,364.12	\$47,881.32	\$28,932.07	\$34,531.32	\$128,230.65	\$8,049.30	\$20,243.30	\$14,308.85	\$1,463,308.85	
Cabir Amroha	\$148,910.13	\$61,284.68	\$20,860.09	\$42,372.18	\$41,721.61	\$1,18,792.79	\$8,090.00	\$1,18,792.79	\$1,18,792.79	\$1,18,792.79	\$1,18,792.79	
Hannah Bell												
Perry Dandala	\$111,259.04	\$89,181.52	\$173,850.26	\$28,179.08	\$59,963.11	\$156,781.00	\$169,233.53	\$252,982.76	\$20,130.06	\$20,773.45	\$1,26,107.22	\$1,698,152.57
Samantha	\$293.54											
Total	\$ 313,809.06	\$ 165,007.66	\$ 458,501.81	\$ 499,083.53	\$ 199,093.84	\$ 205,627.66	\$ 345,657.58	\$ 281,158.65	\$ 258,010.14	\$ 231,028.05	\$ 40,529.84	\$ 3,001,287.82

Below the table are several filter sections for 'Sales by Sales Rep (Bar Graph View)', 'Sales by Month or Year (Cross Tab View)', 'Sales by Sales Source (Bar Graph View)', 'Sales "WON" by Sales Source (Bar Graph)', 'Sales "LOST" by Sales Source (Bar Graph)', 'Sales "WON" by Sales Source (List)', and 'Sales "LOST" by Sales Source (List)'. Each section includes 'Quote Date' and 'Quote Status' dropdowns and 'EXECUTE QUERY' and 'REFRESH' buttons.

- Quotes Search (filter, criteria-based searching)

The screenshot shows the Quotes Search interface. On the left, there's a sidebar with 'Dashboards' (Default Dashboard, Sales Reporting), 'Views' (Quotes (Management View), Quotes Search, Recycle Bin), and 'Jobs'. The main area displays a 'Quotes Search: Select Criteria' form:

Customer Name:	<input type="text"/>	<input type="button" value="EXECUTE QUERY"/>	<input type="button" value="REFRESH"/>
Site Address:	<input type="text"/>	<input type="button" value="Search"/>	
Quote No:	<input type="text"/>		
Quote Date:	<input type="button" value="--ANY--"/>		
Quote Status:	<input type="button" value="--ANY--"/>		
Sales Rep:	<input type="button" value="--ANY--"/>		
Job Type:	<input type="button" value="--ANY--"/>		

Below the form are 'Customer Name' and 'Site Address' input fields, and a search button. The bottom of the page includes copyright information: 'Copyright ©2018 My Cloud Solutions Limited. All Rights Reserved. Terms of Service | Privacy Statement'.

- Recycle Bin (deleted/archived quotes)

Name	Deleted By	Deleted On
553 Miltborough Road, Mount Roskill, Auckland 1041 Lot 2	Percy Darbina	28/10/2023 10:50:03 AM
Quote Items	RESTORE DELETE	
42362	Percy Darbina	7/1/2023 6:18:37 PM
42358	Percy Darbina	7/1/2023 1:22:35 PM
42345	Percy Darbina	7/1/2023 1:09:43 PM
42342	Percy Darbina	6/11/2023 11:39:39 PM
42340	Percy Darbina	6/11/2023 11:08:47 PM
42359	Percy Darbina	6/11/2023 11:07:13 PM
42358	Percy Darbina	6/11/2023 11:05:29 PM
42356	Percy Darbina	6/11/2023 11:03:49 PM
42355	Percy Darbina	6/11/2023 10:03:23 PM
42354	Percy Darbina	6/11/2023 9:59:44 PM
42353	Percy Darbina	6/11/2023 9:57:55 PM
42351	Percy Darbina	4/11/2023 7:00:38 PM
42357	Percy Darbina	4/11/2023 2:37:39 PM
42356	Percy Darbina	4/11/2023 2:36:40 PM
42285	Percy Darbina	4/11/2023 2:10:10 PM
42280	Percy Darbina	3/11/2023 11:51:10 PM
42278	Percy Darbina	3/11/2023 6:48:48 PM
42277	Percy Darbina	3/11/2023 6:47:49 PM
42276	Percy Darbina	3/11/2023 6:42:20 PM
42275	Percy Darbina	3/11/2023 6:41:34 PM
42255	Percy Darbina	1/11/2023 2:38:53 AM
42252	Percy Darbina	1/11/2023 2:35:36 AM
42250	Percy Darbina	1/11/2023 2:35:34 AM
42245	Percy Darbina	3/10/2023 5:36:59 PM
42242	Percy Darbina	3/10/2023 5:17:39 PM
42238	Percy Darbina	3/10/2023 5:13:52 PM
42235	Percy Darbina	3/10/2023 5:08:04 PM
42231	Percy Darbina	3/10/2023 5:03:53 PM
42227	Percy Darbina	3/10/2023 4:50:31 PM
42226	Percy Darbina	3/10/2023 4:40:42 PM
42225	Percy Darbina	3/10/2023 4:39:02 PM
42201	Percy Darbina	30/10/2023 3:55:35 PM
41100...	Percy Darbina	30/10/2023 3:56:04 PM

Quote Actions and Filters:

- Add New Quote / New Quote Item

New Quote - MCS for Premier Insulation West Auckland & Rodney

Job Type: None | Quote Status: Draft | Follow Up Date: 8/11/2023

Customer Details

Sales Rep Details

Key Contacts

Other Site Contacts

TAGS / COMMENTS

Customer Acceptance

Discount Formula	Totals & Margins	Final Quote Amounts	Customer Acceptance
Discount? \$0.00 Applied? No	SUB TOTAL \$ 0.00 TOTAL COST \$ 0.00 MARGIN 0 %	TOTAL (Excl. GST) \$ 0.00 GST \$ 0.00 TOTAL Incl. GST \$ 0.00	Acceptance Date 8/11/2023 PO Number Upload Signed Copy of Quote CHOOSE FILE No file chosen

Quote Status: Accepted, Accepted - Job Created, Draft, Not Accepted, Sent, Tender/Jobs to Price, Tender Due

- Multi-quote export (PDF/Word)

- Customize views and columns
- Search/filter quotes by:
 - Customer Name
 - Quote No
 - Site Address
 - Quote Date/range
 - Quote Status
 - Sales Rep

Job Type -

- Execute custom queries for quotes
- Refresh listings

Quote Table Columns (Fields Tracked per Quote):

- Action (View, Edit, Add Quote Item, Clone, etc.)
- Quote No
- Region

- Quote Source
- Job Type
- Quote Status
- Quote Date
- Follow Up Date
- Sales Rep
- Customer Name
- Site Address
- Scheduled Job Date
- Job Numbers associated
- Discount Applied?
- Total Value (Excl. GST)
- Margin
- Quote Cloned?

Other Page Functions:

- Sidebar pin/unpin
- Hide/show filters and navigation
- Search (global/quote-specific)
- Export quote search results to Excel

Quote Lifecycle Functionality:

- Status: (Draft, Sent, Accepted, Invoiced, Tender, etc.)
- Customer follow-up management
- Linking jobs to Quotes
- Tracking job status and progress via calendar and job modules

These form the **core feature set** you'll need to plan for development of a comprehensive quoting and job management platform for services in building or trade industries.[mycs](#)

1. <https://login.mycs.co.nz/secure/db/67726/overview.aspx?t=596376>

