



# Quantum Software Solutions

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## Features and Benefits

- Schedule your jobs
- Manage and track service calls
- Manage and track punch lists
- Efficiently distribute work orders and schedules
- Organize and manage your contacts in the contact manager
- Track workmen's compensation & liability insurance
- Print/Email/Fax professional looking work orders/schedules
- Update your entire schedule in 1 step
- Create Gantt Charts
- Can also run on your Palm or Pocket PC
- Compatible with Windows Vista or higher
- Multiple user licenses available



## VirtualBoss – Construction Scheduling Software

As a homebuilder, general contractor, property manager, developer, remodeler or service company you need the right scheduling software to stay on top of things. VirtualBoss was designed to streamline your scheduling and job management functions without wasting any time with setup or learning how to make it work. You could be up and running in less than an hour!

VirtualBoss will schedule and keep track of your jobs. You will have a better idea of where things are out in the field, and you will be able to completely update your entire schedule by updating just 1 task. Your completion times will be reduced because of better planning, better communication, and increased thoroughness. Say goodbye to endless punch list tracking with legal pads. You can add additional tasks to any job in seconds. Punch lists, service calls, and to-do items will not be forgotten or fall through the cracks. VirtualBoss offers a powerful system at an affordable price.

VirtualBoss operates on any Windows based PC, including desktops, laptops, Pockets PC's, stand-alones, and networks. The many features of VirtualBoss ensure that you know the exact status of your project and task list at anytime. VirtualBoss keeps track of the "big picture" for you. Enter job pertinent data once and it is automatically reflected on all reports. Your entire schedule can be updated by changing a single task. With just two clicks you can email, fax, and mail work orders to an unlimited number of sub-contractors, suppliers, or employees. Recipients understand what needs to be done and where and when they are scheduled to work. This improved communication is one of the hallmarks of VirtualBoss and leaves little room to question what, where, or when. VirtualBoss offers a powerful yet affordable system for homebuilders, general contractors, remodelers, tradespersons, developers, real estate property managers, and related businesses. It's the logical choice for those who demand the best in job efficiency and productivity.

**Bottom line:** VirtualBoss will keep you ahead of your competition.

For more information, visit [www.quantumss.com](http://www.quantumss.com), email [sales@quantumss.com](mailto:sales@quantumss.com) or call 1-800-894-1278.

## VirtualBoss Basic Information

**VirtualBoss summary** – VirtualBoss is an “easy to use” job scheduling and task management software program designed for contractors by contractors. VirtualBoss was designed to streamline your scheduling and job management functions. VirtualBoss operates on any Windows based PC, including desktops, laptops, Pockets PC’s, stand-alones, and networks. The many features of VirtualBoss ensure that you know the exact status of your project and task list at anytime. VirtualBoss keeps track of the “big picture” for you. Punch lists, service calls, and to-do items won’t be forgotten or fall through the cracks; enter job pertinent data once and it is automatically reflected on all reports. Your entire schedule can be updated by changing a single task. With just two clicks you can email, fax, and mail work orders to an unlimited number of sub-contractors, suppliers, or employees. Recipients understand what needs to be done and where and when they are scheduled to work. This improved communication is one of the hallmarks of VirtualBoss and leaves little room to question what, where, or when. VirtualBoss offers a powerful yet affordable system for homebuilders, general contractors, remodelers, tradespersons, developers, real estate property managers, and related businesses. It’s the logical choice for those who demand the best in job efficiency and productivity.

- Schedule your jobs
- Manage and track service calls
- Manage and track punch lists
- Efficiently distribute work orders and schedules
- Organize and manage your contacts in the contact manager
- Track workmen’s compensation & liability insurance
- ... And more!

**What are the system requirements?** VirtualBoss is compatible with **Windows XP or higher**. It will run smoothly on anything from a notebook to a network and requires minimal disk space (less than 10 megabytes) and memory.

**Will VirtualBoss run on a network?** VirtualBoss will run simultaneously on any PC based network. It will run on Peer-to-Peer or a Server based network. There is no limit to the number of users that can access a VirtualBoss data set, even at the same time. We do offer single user and multiple user licensing options.

**Will VirtualBoss run on a Mac?** VirtualBoss will run on a Macintosh if you have a Windows emulator program. Most of our Macintosh users have Virtual PC. It is made by Connectix.

**What is the typical setup time and learning curve?** VirtualBoss was made to be easy to use. It will not take you long to get started. Most people with limited computer experience are set up and running (scheduling jobs, tracking punch lists, and printing work orders) in 1 - 2 hours. Other job management software requires a lot more time. VirtualBoss comes with free technical support for one year. You can call or email our service team at any time.

**Who uses VirtualBoss?** Homebuilders, remodelers, developers, general contractors, real estate managers, service companies, subcontractors, and many others!

**Is there a limit to the amount of information entered in VirtualBoss?** There is no limit to the amount of tasks, jobs, or contacts that can be entered into VirtualBoss.

**Does VirtualBoss integrate with any other software programs?** VirtualBoss integrates with Microsoft Excel when using the import/export feature. However, it does not integrate with any accounting system such as: Timberline, Peachtree, and QuickBooks. (Although, we are planning integration with QuickBooks)

**What type of Help is offered with the program** - We have our Getting Started instructions that appear immediately after installing the program. We have a built-in Help Module that gives you a basic understanding of how all the features in VirtualBoss work. We offer FAQ’s on our website and you can contact our service department at anytime for technical support via email or by calling.

## VirtualBoss Features

**Develop a Critical Path within your schedule** – When setting up a schedule in VirtualBoss you have a “linking” option, which allows you to link all tasks within a particular job together to create a critical path within that job. You have the ability to set your schedule up where one task could not start until another task is completed. Or if one task is falling behind all the following tasks (dates) within that schedule will be changed according to the delay in the schedule (will change the dates in the schedule like a chain reaction). This feature save you time and allows you to follow your schedule even more efficiently. All you need to do is link a task’s start date to a previous task’s finish date. You do this on the Task Detail Screen by putting a check in the field shown in the window

below. When you place a checkmark in this box, a list of tasks to choose from will appear. Once you select a task for this task to follow, this task's start date will be controlled by the previous task's finish date. You can link as many tasks in a row as necessary and you can also link multiple tasks to follow one task's finish date. If you change one task, all the following tasks dates will be updated automatically.

**Using the Fast Job Copy feature** - You can save a lot of time by duplicating a job rather than setting a job up from scratch. Many customers set up one or more job templates to duplicate when creating new jobs. You duplicate jobs in the **Job Manager**. VirtualBoss will ask you for a new Job # (the field is alpha numeric) and will then create a new job by copying all tasks from an existing job or template and assigning these tasks to the new job. All your links, task descriptions, task notes, order numbers, etc. will be copied into the new job. You can edit your new job by adding, updating, or deleting from it at anytime. This saves a considerable amount of time and eliminates the process of having to setup new jobs from scratch every time you start a new job.

**Using the Job Manager Screen** -VirtualBoss will manage and track your jobs within the Job Manager screen. Job site details can be printed with many sorting and filtering options. Information maintained for every job in the Job Manager contains:

- Job Number/Name
- Lot Number
- Development Name
- Owner's Name phone number
- Lock box combination
- Directions to Job Site
- Job site address
- Job site notes

**VirtualBoss Task List (Main Screen)** – VirtualBoss allows you to keep on top of everything that needs to be done on every job site. VirtualBoss gives you a place to consistently put your to-do items. Your task list can be filtered by using our Filter Options button so you can view your list in many different ways. As you review the task list you print, email, or fax works orders as necessary. The Task List is where you view all your outstanding (shown in red) or completed tasks (shown in blue) in your jobs.

**The VirtualBoss Gantt Chart** – With the Gantt chart you can see a graphic representation of any or all of your jobs. You can manipulate the view on the Gantt chart by using our Filter Options, which will allow you to view just one job or multiple jobs, one sub or multiple subs (to see if they're overlapping for example), a specified date range, a certain group, and many other options. You can also change the format of the Gantt chart in our Gantt Chart Options. You can easily view the “big picture” and change your schedule on the chart itself. You can track your tasks as one week flows into the next with contrasting colors to indicate the weekends. Specific task details on the Gantt Chart are only one mouse click away, and will adjust themselves in your Gantt Chart as you make changes to your schedule.

**Contact Management (Address Book)** - VirtualBoss includes a built-in Address Book where you can record the names, addresses, phone numbers, and even more detailed information on all your subs, employees, suppliers, customers, etc. This information is integrated with the job scheduling and task-tracking features. With the Contact Manager you can:

- Save multiple addresses and phone numbers for each contact.
- Have a place to consistently store information on **any** category of person or company and be able to refer to it at any time. VirtualBoss leaves an additional amount of room for entry of additional information on each contact.
- Print or view multiple copies of your Address Book by company name, profession, person, or group (for example – group your sales leads or suppliers) at anytime.
- Be able to print a list of all outstanding tasks, completed or pending for any contact.
- Each person added to the Contact Manager will be available on the list of assignees for tasks.
- Track and manage your sales calls.
- Overall, you will have a consistent place to put your names, addresses, phone numbers, for each person that has anything to do with your schedule.
- You can also import contacts from other databases through Microsoft Excel and export contacts to Microsoft Excel. This is a nice **new** feature that will streamline your entry process!

**Manipulate the view on all screens and reports by using Filter Options-** Using the Filter Options button allows you to easily filter down to only the items you want to see. You can add tasks and or jobs to groups and view only tasks that are members of the groups you set up. For example you can create groups by job location (city, county, etc.) subdivision names, primary scheduling items, active jobs, pending jobs, and many more. You can apply these filters to what you see on screen and to what you print, fax, or email.

**VirtualBoss Work Orders and Schedules** - VirtualBoss will schedule and keep track of all job site activities. With just two clicks, you can **print, systematically fax, or email** work orders to an unlimited number of sub-contractors, suppliers, or employees. You can:

- Print, fax, or email lists of outstanding items for any job, any individual, or any date range.
- Access important job site information instantly.
- Quickly review the status of outstanding tasks before paying bills.
- Maintain a central location that stores all work orders.
- Eliminate mistakes and misunderstandings that are often made when using manual to-do lists.
- Review and analyze work order turn around time.

When using the **faxing** feature in VirtualBoss you will need to have a faxing program on your PC. You can use the built-in faxing within your Windows operating system or we recommend purchasing **WinFax Pro 10.0** so you can easily fax every outstanding work order with less effort than it takes to make 1 phone call. The timesavings are incredible. You can fax 100 work orders to 100 different subcontractors as easy as you can print work orders for those subcontractors. (Win Fax Pro is about \$99). When **emailing** work orders and schedules, they email in text (.txt) format so everyone can read them with or without VirtualBoss.

## Additional VirtualBoss Features

**Job Templates included with the software** – With each licensed version of VirtualBoss, customers receive multiple job templates they can utilize if needed. These templates can be duplicated to as many different jobs as needed. After the templates have been duplicated they can be added to, deleted from, or updated at anytime.

**Helpful Builder Forms** – Also included are 21 helpful builder forms ranging from contracts to budgets and to specification forms.

**Taking days off in VirtualBoss** – Before setting up a schedule you need to take all your days off (weekends and holidays) for the next couple years. You can change your days off at anytime and the change will reflect on your schedule.

**Tracking Workman's Comp and Insurance** – In each contact record in the Contact Manager you can track their Workman's Comp and Insurance by entering that information into the Profile tab. You also have the option to print a report on all contacts that have Workman's comp and insurance so you know what their status with these options.

**VirtualBoss backup & restore feature** – VirtualBoss has a built-in backup feature where you can backup your entire database in just 3 clicks directly from the program and save it anywhere. Once the file has been backed up you can then restore the file back into VirtualBoss.

## VirtualBoss on a PDA

**Pocket PC** – Our new Pocket PC version works with your PC version to give you even more functionality. VirtualBoss is now flexible and mobile! You can take your schedule and contact list in the field with you. If you're at the job site and for any reason need to make adjustments to your scheduled tasks (for example, if you're running ahead or behind schedule), you can make changes on the spot. Add notes, make changes to your schedule, and synchronize those changes with your PC version. You have all options available on your desktop version on the Pocket PC version except the Gantt Chart. This is a powerful tool that gives you access to all your information, no matter where you are.

**Palm** - If you own a handheld device such as a **Palm**, you can take your task list out in the field with you. If you're at the job site and for any reason need to make adjustments to your scheduled tasks (if you're running ahead or behind schedule, for instance), you can make the changes on the spot. With our **Import/Export** feature (to/from MS Excel) you will be able to synchronize your task list between your PC and your PDA. You can view and update your task list in the field. When using the import/export feature with a **Palm**, you will only be able to view your task list out in the field (not your contact list). Because the VirtualBoss Import/Export feature converts task lists into Microsoft Excel spreadsheets, you will need a spreadsheet program for your Palm that will let you view and modify them. There are many programs out there, but we recommend using **Quicksheet** by Cutting Edge Software, Inc. It is a powerful spreadsheet utility that will let you modify your task lists easily. We are in the process of developing a Palm version that should be released very soon and will allow you to do everything the Pocket PC version allows you to do!

**Bottom line:** VirtualBoss will keep you ahead of your competition.

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