

Getting Started with Estimating

The screenshot displays the UDA ConstructionOnline software interface for a project named 'Farrell Residence'. The interface is divided into several sections:

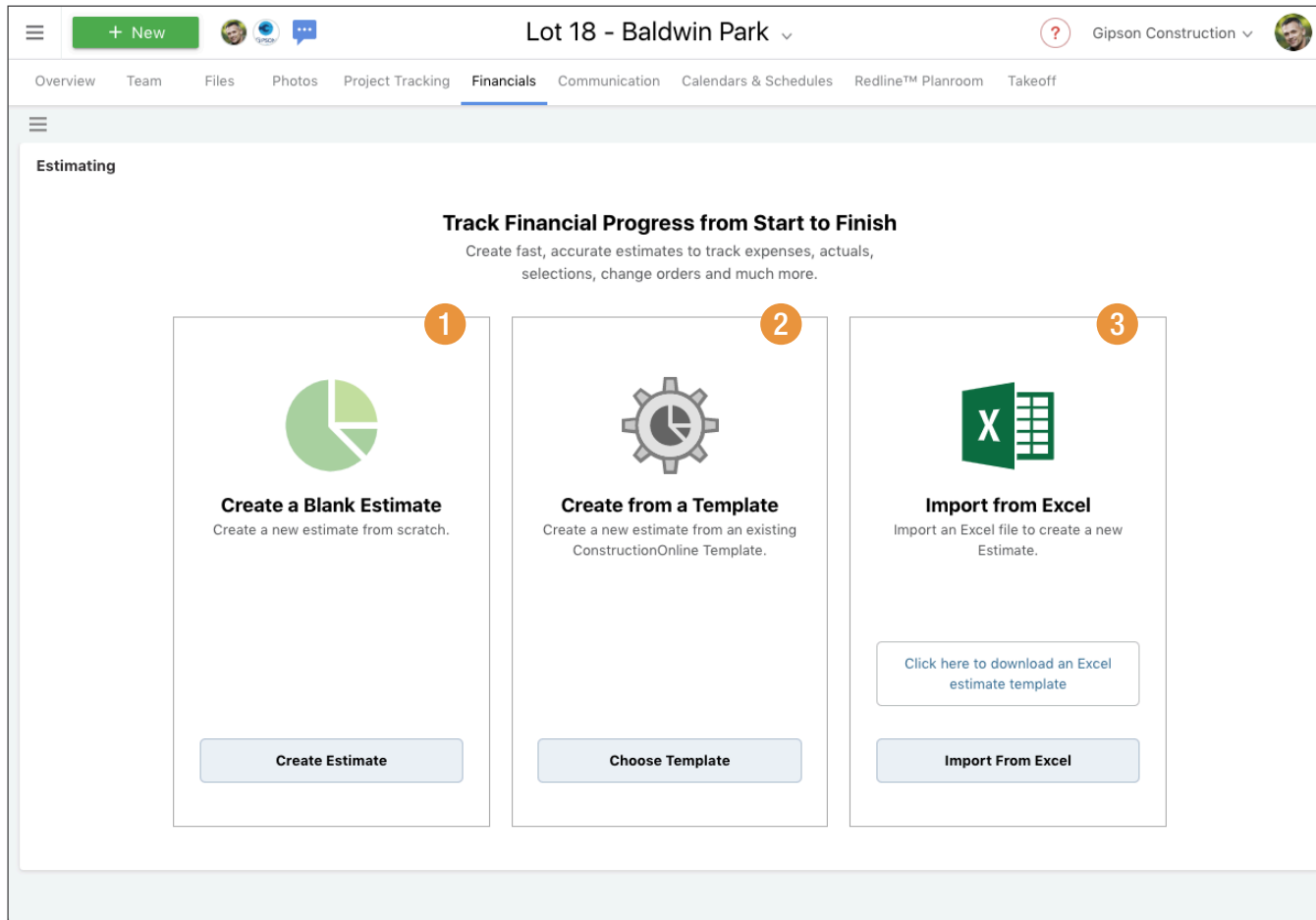
- Top Navigation:** Includes a '+ New' button, a user profile icon, and a 'Menu List'.
- Left Sidebar:** Contains a 'Project Totals' section with a green bar chart and a 'Cost Code' dropdown menu.
- Main Table:** A detailed estimate table with columns for 'ITEM', 'UNIT', 'UNIT COST', 'BASE COST', 'STATUS', and 'RESOURCE'. It lists various construction items under the 'Roofing' category, including 'Roofing Labor', 'Roofing Materials', and 'Shingles'.
- Right Panel:** Features a 'Column View' section with a 'Link to Estimate' button and a 'Category Total' of \$12,819.28.

The table data is as follows:

| ITEM | UNIT | UNIT COST | BASE COST | STATUS | RESOURCE |
|--------------------------|------|-----------|------------|-----------|---------------------|
| Roofing Labor | 12 | \$140.89 | \$1,690.68 | Estimated | Roofing Labor |
| Roofing Materials | 12 | \$12.50 | \$150.00 | Estimated | Roofing Materials |
| Shingles | 200 | \$12.50 | \$2,500.00 | Estimated | Shingles |
| Valley Flashing | 10 | \$42.87 | \$428.70 | Estimated | Valley Flashing |
| Strip Edge Flashing | 10 | \$42.87 | \$428.70 | Estimated | Strip Edge Flashing |
| Acrylic Seal Joints | 10 | \$14.25 | \$142.50 | Estimated | Acrylic Seal Joints |
| Roofing Nails | 10 | \$12.50 | \$125.00 | Estimated | Roofing Nails |
| Total: Roofing Labor | | | \$1,690.68 | | |
| Total: Roofing Materials | | | \$2,500.00 | | |
| Total: Roofing | | | \$4,190.68 | | |

Creating a New Estimate

ConstructionOnline makes it easy to get your estimates up and running. You can build your estimates your way by creating them from scratch, from an existing template, or by importing an Excel spreadsheet. You can also choose the estimate structure that works best for your jobs.



1 Create a Blank Estimate

Start from a blank slate and build your estimate to suit your needs. You can choose between a Standard or a 5 Column structure, and create a Summary (2-Level) or Detailed (3-Level) estimate.

2 Create from a Template

This option will allow you to create a new Estimate from a previously saved Estimate Template.

3 Import from Excel

Create your Estimate from an Excel file. Download links for Excel templates are provided here so you can ensure your data is imported correctly.

Quick Tip

Each project is limited to one estimate, to ensure accurate financial reporting. To create a new estimate for a project that already has one, you'll need to delete the existing estimate first.



Creating a New Estimate

ConstructionOnline offers flexible options for your estimate structure. You can choose to organize your estimate into 2 or 3 levels, depending on the amount of detail you require. You can also choose a standard or 5-column cost calculation method.

1 Step 1 of 3 - Estimate Name & Cost Code List

ESTIMATE NAME
Lot 18 - Baldwin Park Estimate

COST CODE LIST
Cost codes are not assigned to this project. [Assign here.](#)
If a Cost Code list has already been assigned at the project level, then it cannot be changed here.

Next

2 Step 2 of 3 - Choose Estimate Detail Level

Standard (2-Level)
This estimate structure consists of Categories and Subcategories

Advanced (3-Level) BETA
This estimate structure consists of Categories, Subcategories and Items

Next Cancel

3 Step 3 of 3 - Choose Cost Calculation Method

Standard Calculation
In this method, Base Cost is calculated by multiplying Quantity times Unit Cost.

5-Column Calculation
In this method, Base Cost is calculated by multiplying Quantity times the sum of Material, Labor, Subcontractor, Equipment and Other costs.

Back Save Cancel

1 Estimate Name & Cost Codes

Here's where you'll name the estimate and assign a Cost Code list if you wish. Please note that if cost codes have already been assigned at the project level, they cannot be changed here.

2 Estimate Detail Level

You can choose to organize your estimate by 2-Levels (Category > Subcategory) or 3-Levels (Category > Subcategory > Item), depending on the amount of detail you would like to see.

3 Base Cost Calculation Method

Here's where to set how your Base Cost is calculated. You can choose the Standard method (Quantity x Unit Cost), or the 5-Column method (Quantity x the sum of Material, Labor, Subcontractor, Equipment, & Other Costs).

Estimate View - Project Totals Sheet

The Project Totals sheet is where you can get a big picture view of your estimate values. You can quickly navigate to a specific category, see your invoiced amounts, review change order amounts, and much more.

The screenshot shows the 'Project Totals' sheet for 'Lot 18 - Baldwin Park'. At the top, there's a header bar with a '+ New' button, user avatars, and the project name. Below this is a 'Show Financial Categories' link. The main table has columns: NAME, BASE COST, MARKUP TOTAL, CONTRACT PRICE, C.O. PRICE, INVOICED, and QUICKBOOKS INVOICED. The table is organized into sections: 'Project Totals' (green header), 'Category 1' and 'Category 2' (grey headers), 'Project Subtotals' (green header), 'Selections Total' (purple header), 'Company Overhead and Margin' (grey header), 'Change Orders Total' (orange header), and 'Unclassified QuickBooks' (grey header). At the bottom, there's a 'Project Totals' row (green) and a 'Sheet Tabs' bar (orange) with tabs for 'Project Totals', 'Category 1', 'Category 2', 'Selections', 'Company Overhead and Margin', and 'Change Orders'. Numbered callouts are placed over the interface: 1 points to the 'Column View' dropdown, 2 points to the 'Category 1' header, 3 points to the 'Selections Total' row, and 4 points to the 'Sheet Tabs' bar.

| | NAME | BASE COST | MARKUP TOTAL | CONTRACT PRICE | C.O. PRICE | INVOICED | QUICKBOOKS INVOICED |
|--|------|-----------|--------------|----------------|------------|----------|---------------------|
| Project Totals Project Total: \$ 0.00 | | | | | | | |
| Category 1 | | | | | | | |
| Subcategory A | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Subcategory B | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Total: Category 1 | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Category 2 | | | | | | | |
| Subcategory A | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Subcategory B | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Total: Category 2 | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Project Subtotals | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Selections Total | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Company Overhead and Margin | | | \$ 0.00 | \$ 0.00 | | \$ 0.00 | \$ 0.00 |
| Change Orders Total | | | \$ 0.00 | | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Unclassified QuickBooks | | | | | | | |
| Estimate Unqualified | | | | | | | \$ 0.00 |
| Selection Unqualified | | | | | | | \$ 0.00 |
| Change Order Unqualified | | | | | | | \$ 0.00 |
| Total: Unclassified QuickBooks | | | | | | | \$ 0.00 |
| Project Totals | | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 | \$ 0.00 |

1 Estimate Column View

Choose what columns will show in the estimate, based on where your project is in its lifecycle. There are predefined views for Budgeting, Simple & Advanced Estimating, Job Costing, and Invoicing.

2 Estimate Categories

Any Categories you create in the estimate will be listed first in the table. Click on a category's name to jump directly to its sheet.

3 Selections, Company Markup, Change Orders and More

Additional values beyond the base estimate will be shown here, including selections, change orders, markup, and any unqualified QuickBooks values.



4 Sheet Tabs

Quickly jump to your estimate sheets with Excel-like tabbed navigation.

Estimate View - Category Sheets

When you use 3-level estimating, your estimate is built from Category sheets. These contain all the subcategories and items for each estimate category.

+ New



1752 Lois

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Gipson Construction

Show Financial Categories

Show Estimate Sideba

1752 Lois Estimate

Column View: Advanced Estimate

Project Totals

Insulation & Drywall

Category Total: \$ 7,974.80

| | NAME | QTY | UNIT COST | UNIT | BASE COST | STATUS | RESOURCE | MARKUP | MARKUP TYPE | MARKUP TO |
|----------------------|--------------------------|-----|-----------|--------------|-------------|-----------|-------------|--------|-------------|-----------|
| ▼ Insulation | | | | | | | | | | |
| | Insulation Labor | 80 | \$ 25.00 | Per Man Hour | \$ 2,000.00 | Estimated | Allan Brown | | \$ | \$ 0 |
| | Batt Insulation | 60 | \$ 53.58 | Each | \$ 3,214.80 | Estimated | | | \$ | \$ 0 |
| | Blown Insulation | | \$ 0.00 | Each | \$ 0.00 | Estimated | | 5% | % | \$ 0 |
| | Insulation Baffles | 32 | \$ 25.00 | Each | \$ 800.00 | Estimated | | 5% | % | \$ 40 |
| | Other | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | % | \$ 0 |
| | | | | | | | | | | |
| | Total: Insulation | | | | \$ 6,014.80 | | | | | \$ 40 |
| ▼ Drywall Labor | | | | | | | | | | |
| | Labor Type 1 | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | \$ | \$ 0 |
| | Labor Type 2 | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | \$ | \$ 0 |
| | Labor Type 3 | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | \$ | \$ 0 |
| | Other | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | \$ | \$ 0 |
| | Other | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | \$ | \$ 0 |
| | | | | | | | | | | |
| | Total: Drywall Labor | | | | \$ 0.00 | | | | | \$ 0 |
| ▼ Drywall Materials | | | | | | | | | | |
| | 4"x12"x1/2" Drywall | 120 | \$ 16.00 | Each | \$ 1,920.00 | Estimated | | | \$ | \$ 0 |
| | 4"x12"x1/2" MR Drywall | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | \$ | \$ 0 |
| | Tape | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | \$ | \$ 0 |
| | Drywall Mud | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | \$ | \$ 0 |
| | Corner Bead | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | \$ | \$ 0 |
| | Other | | \$ 0.00 | Each | \$ 0.00 | Estimated | | | \$ | \$ 0 |
| | | | | | | | | | | |
| | Total: Drywall Materials | | | | \$ 1,920.00 | | | | | \$ 0 |
| Insulation & Drywall | | | | | \$ 7,934.80 | \$ 40 | | | | |

Project Totals

Planning

Foundation

Insulation & Drywall

Framing

Exterior Veneer

Cabinetry & Countertops

Interior Trim & Stairs

Floorcovering

Tile & Cera

1 Category Name

Always know where you are in your estimate with the Category name row.

2 Subcategory Details

Each estimate Subcategory is totaled up from the Items within it. Here you can see each item's cost, status, assigned resources, markup and much more.

3 Category Totals Row

See the current category's totals for base cost, markup, linked change orders, and overall total value here.

Selections, Change Orders, and Company Overhead & Margin in Estimates

ConstructionOnline Estimating is designed to cover the entire scope of your jobs, including selection choices, change orders, and company overhead. You'll see up-to-date financials that ensure your projects remain profitable.

1

Farrell Residence

Yuan / Farrell Residence Estimate

Project Totals

Selections

| NAME | SELECTION CHOICES | STATUS | ALLOWANCE | APPROVED | NET |
|----------------------------|--|----------|-------------|--------------|-------------|
| Appliances | | | | | |
| Range | Thor Kitchen 48 in. 6.7 cu. ft. Professional Gas Ra... | Approved | \$ 4,500.00 | \$ 4,999.00 | + \$ 499.00 |
| Refrigerator | LG Electronics 24 cu. ft. 3-Door French Door Sma... | Approved | \$ 3,500.00 | \$ 3,999.00 | + \$ 499.00 |
| Dishwasher | LG STUDIO Top Control Tall Tub Smart Dishwashe... | Approved | \$ 1,500.00 | \$ 1,199.00 | - \$ 301.00 |
| Total: Appliances | | | \$ 9,500.00 | \$ 10,197.00 | \$ 697.00 |
| Plumbing Fixtures | | | | | |
| Sink | Pending Approval - View Choices | Pending | \$ 0.00 | Pending | Pending |
| Faucet | Pending Approval - View Choices | Pending | \$ 0.00 | Pending | Pending |
| Bathroom Sink - Master | Pending Approval - View Choices | Pending | \$ 1,000.00 | Pending | Pending |
| Total: Plumbing Fixtures | | | | | |
| Electrical Fixtures | | | | | |
| 1st Floor Lighting | Pending Approval - View Choices | | | | |
| 2nd Floor Lighting | No Choices Yet - Add Choices | | | | |
| Total: Electrical Fixtures | | | | | |
| Flooring | | | | | |
| Hardwood - 1st Floor | Hardwood option 1 - dark | | | | |
| Tile | Marazzi Montagna Rustic Bay 6 in. x 24 in. Glazed... | | | | |

2

Farrell Residence

Yuan / Farrell Residence Estimate

Project Totals

Company Overhead and Margin

| NAME | MARKUP | MARKUP TYPE | MARKUP TOTAL |
|-----------------------------|---------|----------------|--------------|
| Company Overhead | 15% | Percent Margin | \$ 31,882.32 |
| Company Margin | 5% | Percent Margin | \$ 10,627.44 |
| Contingency | \$ 0.00 | Fixed Amount | \$ 0.00 |
| Other 1 | \$ 0.00 | Fixed Amount | \$ 0.00 |
| Other 2 | \$ 0.00 | Fixed Amount | \$ 0.00 |
| Company Overhead and Margin | | | \$ 42,509.76 |

3

Farrell Residence

Yuan / Farrell Residence Estimate

Project Totals

Change Orders

Change Orders Total: \$ 15,900.00

| NAME | STATUS | C.O. COST | MARKUP | C.O. PRICE |
|-------------------------------|----------|--------------|-------------|--------------|
| Approved Change Orders | | | | |
| Design Services Revisions | Approved | \$ 0.00 | \$ 0.00 | \$ 0.00 |
| Window Upgrade | Approved | \$ 2,000.00 | \$ 750.00 | \$ 2,750.00 |
| Change Windows | Approved | \$ 1,500.00 | \$ 150.00 | \$ 1,650.00 |
| Countertop Upgrade | Approved | \$ 2,000.00 | \$ 0.00 | \$ 2,000.00 |
| Electrical upgrades | Approved | \$ 1,800.00 | \$ 200.00 | \$ 2,000.00 |
| Electrical Upgrades - 2 | Approved | \$ 750.00 | \$ 250.00 | \$ 1,000.00 |
| Patio Upgrade | Approved | \$ 4,000.00 | \$ 1,000.00 | \$ 5,000.00 |
| Add a closet | Approved | \$ 1,000.00 | \$ 500.00 | \$ 1,500.00 |
| Total: Approved Change Orders | | \$ 13,050.00 | \$ 2,850.00 | \$ 15,900.00 |

1 Client Selections

See all of your allowance values, selection statuses, and approved choices in the Selections tab.

2 Company Overhead & Margin

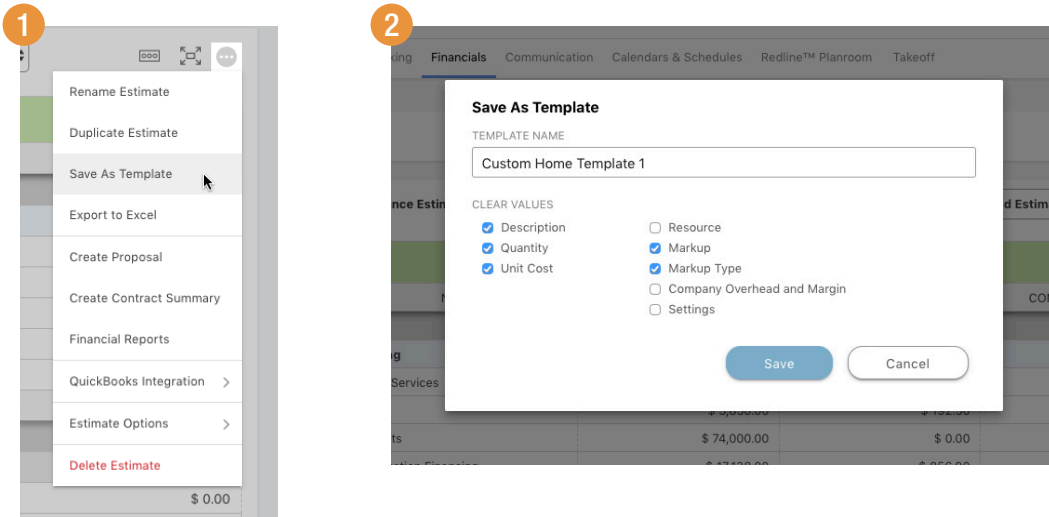
Here's where you can set your overhead, margin, and contingency for the estimate so you can ensure profitability.

3 Change Orders

Any change orders for the project will be listed here, along with statuses, markup and client prices.

Working with Estimate Templates

Estimate templates give you the power to save time and reproduce success in future jobs. Once you've found an estimate structure that works for you, it's simple to create a template from it with as much or as little detail as you need.

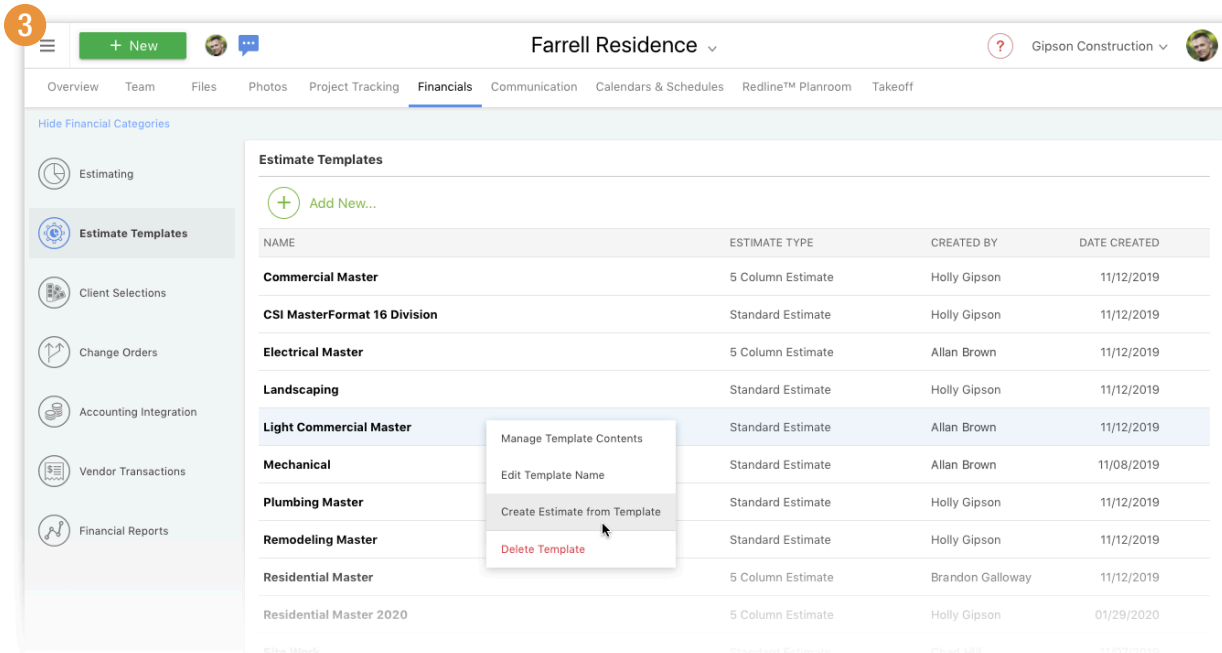


1 Click "Save As Template"

You can save any estimate you've created as a template for future use - simply click "Save As Template" from the estimate.

2 Choose Estimate Values to Include in the Template

Select the values you want to carry over to the template, including quantities, unit costs, markup, resources and more.



3 Estimate Template is Created!

Your templates are located in the Estimate Templates tab. Here you can create new estimates from templates, manage template contents, edit template names and more.

Financial Reports

ConstructionOnline provides you with dozens of reporting options for all features. The Financial Reports section contains professional proposals, contracts, summaries and more so you can run your jobs more efficiently and win more jobs in the future.

+ New

Farrell Residence

Gipson Construction

OverviewTeamFilesPhotosProject TrackingFinancialsCommunicationCalendars & SchedulesRedline™ PlanroomTakeoff

Show Financial Categories

Financial Reports

EstimatesSelectionsChange OrdersExports

Estimating Reports

Current Contract Summary

Create a summary of your estimate, including categories, subcategories, and markup.

Estimate Proposal

Easily create professional proposals for your clients from estimates.

Simple Estimate Proposal

Create a clear, simple proposal from your estimate.

Estimate vs. Actual Report

Track project profitability with this report showing variance between total estimated costs and actuals.

Estimate vs. Invoiced Report

Create a report that compares your invoiced amounts against your estimated costs.

Committed vs. Actual

Review line item payments by comparing committed costs to actuals and calculating variance.

Estimate Status Report

Show estimate items filtered by their assigned status.

Materials List

Generate a list of project materials by resource or estimate category.

Estimate Notes Report

Create a report containing any item notes within a specific estimate.

Purchase Order

Create a purchase order for your vendors directly from an estimate.

Harbison Design Build

Moores Mill Road

Auburn, AL 36830

Farrell Residence Estimate

Estimate Summary

| NAME | QTY | UNIT COST | MARKUP | TOTAL |
|------------------------|-----|--------------|-----------|---------------------|
| Planning | | | | |
| Design Services | | | | |
| Site Plan | 1 | \$ 180.00 | \$ 9.00 | \$ 189.00 |
| Survey | 1 | \$ 260.00 | \$ 13.00 | \$ 273.00 |
| Design Services | 1 | \$ 10,000.00 | \$ 0.00 | \$ 10,000.00 |
| Total: Design Services | | | | \$ 10,462.00 |
| Permits | | | | |
| Building Permit | 1 | \$ 2,024.00 | \$ 101.20 | \$ 2,125.20 |
| Zoning Permit | 1 | \$ 264.00 | \$ 13.20 | \$ 277.20 |
| Inspection Fees | 1 | \$ 352.00 | \$ 17.60 | \$ 369.60 |
| Impact Fees | 1 | \$ 1,210.00 | \$ 60.50 | \$ 1,270.50 |
| Total: Permits | | | | \$ 4,042.50 |
| Lot Costs | | | | |
| Lot Cost | | \$ 74,000.00 | \$ 0.00 | \$ 74,000.00 |