

Getting Started with Estimating

CoConstruct's single-entry financials enables information to transfer across the financial suite of your system, reducing mistakes and avoiding double entry.

BASICS

Get organized with 3 tiers.

1. Set up broad CATEGORY buckets to organize information in a seamless, easy to understand format.
2. Build out major building block ITEMS consisting of Specifications and Selections that you'll price and define.
3. Add in all the relevant COST LINES to represent the various prices going into the project.

The screenshot shows a software interface with a table of cost estimates. A green arrow points from the 'Category' label to the '2000 Excavation and Foundation' row. Another green arrow points from the 'Item' label to the 'Excavation' row. A third green arrow points from the 'Cost' label to the 'Earth Hauling' row. The table has columns for Description, Qty, Units, Unit Cost, Ext. Cost, Cost Type, Accounting Code, Profit, Total Price, Price/sq. ft., and % of Total.

Description	Qty	Units	Unit Cost	Ext. Cost	Cost Type	Accounting Code	Profit	Total Price	Price/sq. ft.	% of Total	Notes
1000 Preparation Preliminaries				\$124,048.00				\$17,012.00	\$155,060.00	21.80%	
1000 Permits and Fees				\$20,000.00				\$7,000.00	\$15,000.00	4.60%	
1100 Architectural and Engineering				\$4,100.00				\$1,920.00	\$5,120.00	0.72%	
2000 Excavation and Foundation				\$29,680.99				\$7,420.00	\$37,101.24	5.14%	
^ 2000 Excavation				\$5,805.00				\$1,451.00	\$7,256.25	1.00%	
Excavation	2,000	each	1.02	2,040.00	Subcontract	2000 - Excavati	25%	510.00	2,550.00	0.35%	
Shoring	1	each	2,016.00	2,016.00	Subcontract	2000 - Excavati	25%	504.00	2,520.00	0.35%	
Earth Hauling	1	each	1,749.00	1,749.00	Subcontract	2000 - Excavati	25%	437.00	2,186.25	0.30%	
2000 Foundation Protection				\$7,875.99				\$2,000.00	\$9,876.00	1.33%	
2000 Rough Structure				\$98,875.99				\$24,712.75	\$123,588.74	16.70%	
3000 Steel				\$4,500.00				\$1,137.50	\$5,637.50	0.76%	
3100 Framing				\$19,000.00				\$4,750.00	\$23,750.00	3.20%	
3400 Concrete				\$22,400.00				\$5,710.00	\$28,110.00	3.90%	
3500 Rough Slab Metal				\$2,975.99				\$743.99	\$3,719.99	0.50%	
TOTAL EST. TOTAL				\$712,089.56				\$143,180.42	\$715,902.06		

Learn More: [Transferring Your Current Estimate into CoConstruct](#)

ADDING ITEMS

Start building an estimate by adding items !

1. Begin on the Estimate
2. Select "+ New"
3. Choose to build from **SCRATCH** or **COPY FROM TEMPLATE**

The screenshot shows the 'Add Item' dialog box in the software. It has buttons for '+ New', 'Import', 'Parameters', 'Markup, Margin & Tax', 'Discard', and 'Save'. Below the buttons is a table with columns for Specification, Selection, Qty, Units, Unit Cost, Ext. Cost, Cost Type, Accounting Code, Profit, and a 'Copy from Spec/Selection Template' button. The table shows a total of \$0.00 for the Ext. Cost and Profit columns.

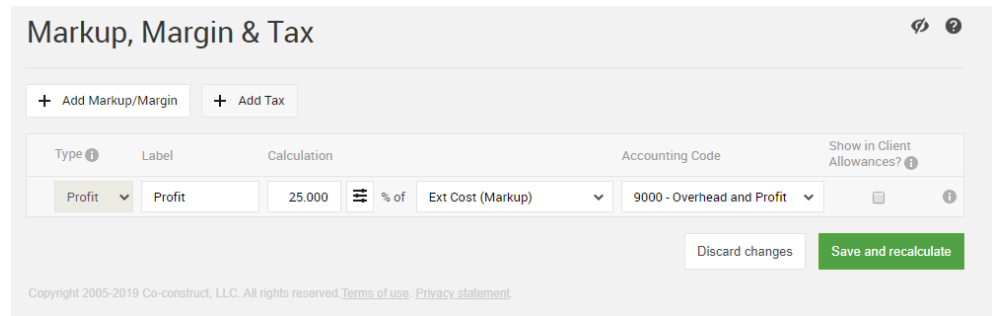
Specification	Selection	Qty	Units	Unit Cost	Ext. Cost	Cost Type	Accounting Code	Profit	Copy from Spec/Selection Template
					\$0.00				\$0.00
Totals					\$0.00				\$0.00
Price/sq. ft.									
% of Total									

Learn More: [Creating an Estimate](#)

Estimating Tools

CONFIGURING MARKUPS/MARGINS

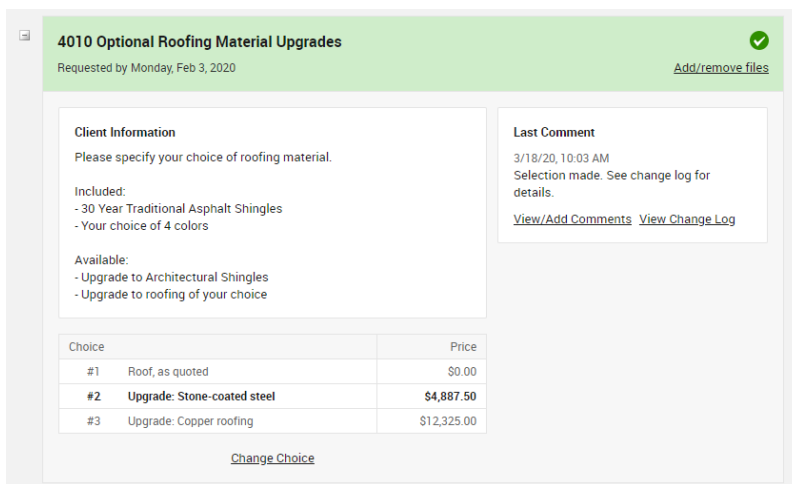
Set certain percentages to calculate on top of the raw estimated costs.



The interface shows a table for configuring markups and margins. It includes buttons for '+ Add Markup/Margin' and '+ Add Tax'. The table has columns for Type, Label, Calculation, Accounting Code, and Show in Client Allowances?. A row is configured with Type 'Profit', Label 'Profit', Calculation '25.000', and Accounting Code '9000 - Overhead and Profit'. There are 'Discard changes' and 'Save and recalculate' buttons at the bottom.

Type	Label	Calculation	Accounting Code	Show in Client Allowances?
Profit	Profit	25.000	9000 - Overhead and Profit	<input type="checkbox"/>

Learn More: [Configuring Your Markup & Tax](#)



The form is titled '4010 Optional Roofing Material Upgrades' and includes a 'Client Information' section with instructions to specify roofing material choices. It lists included items (30 Year Traditional Asphalt Shingles, 4 colors) and available options (Architectural Shingles, roofing of choice). A table shows the pricing for these choices.

Choice		Price
#1	Roof, as quoted	\$0.00
#2	Upgrade: Stone-coated steel	\$4,887.50
#3	Upgrade: Copper roofing	\$12,325.00

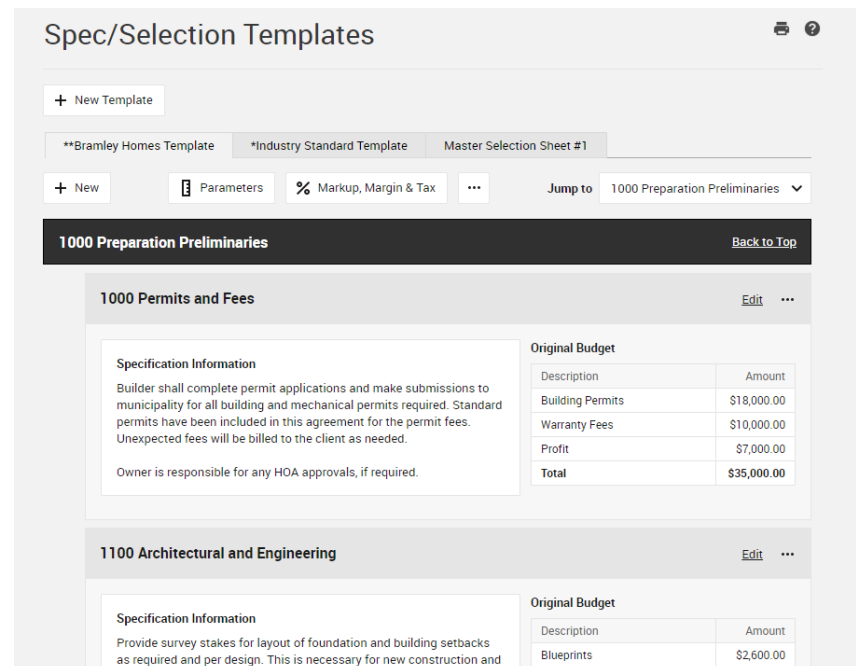
BUILDING SELECTIONS

Account for options, allowances, and choices clients can use to fine tune the project and budget.

Learn More: [Selection Scenarios](#)

TEMPLATES

Save common financial data in a template library for quick, easy use on future projects!



The interface shows a library of templates. The selected template is '1000 Preparation Preliminaries'. It displays 'Specification Information' and an 'Original Budget' table.

Description	Amount
Building Permits	\$18,000.00
Warranty Fees	\$10,000.00
Profit	\$7,000.00
Total	\$35,000.00

Learn More: [Specs & Selections Template Overview](#)