

Specs/Selections & Proposals

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

BASICS

Organize various costs and scope of work details in 1 of 2 types of items:

VS.

Specifications

- standard, included details to the project
- costs/scope NOT requiring any client decision (i.e. labor, hard costs)

The screenshot shows a form for adding a new item. The 'Specifications' section is highlighted with a green border. It includes fields for Item Name, Category, Type (Choice or Specification), Requested By, Milestone, Date, and Urgent. Below these are sections for Specifications (Visible to both clients & trade partners), Client Info (Visible only to clients), and Trade Partner Info (Visible only to trade partners). The 'Original Budget' section includes a checkbox for Client Allowance and a field for Original Budget (\$ 0.00). The 'Files' section has an 'Add File' button. The 'Options' section has a 'What Type?' dropdown (Predefined Choices or Open-Ended Choice) and an 'Option to Decline' checkbox. The 'Open-ended choice' section has a 'Client Price' field (\$ 0.00) and a 'Show as TBD' checkbox. The 'Costs/Prices' section is highlighted in orange and includes an 'Add Cost Line' button. The form also has 'Cancel' and 'Add Item' buttons at the bottom right.

Selections

- options allowing clients to adjust or add scope
- allowances
- any scope requiring client decision

Learn More: [Specification vs Selection Items](#)

SELECTION OPTIONS

Open-Ended

- multiple or "endless" choices to pick from
- free form response from clients
- great for allowances

VS.

Predefined

- set list of options
- clients pick 1 from the list provided
- great for offering packages or limited number of options

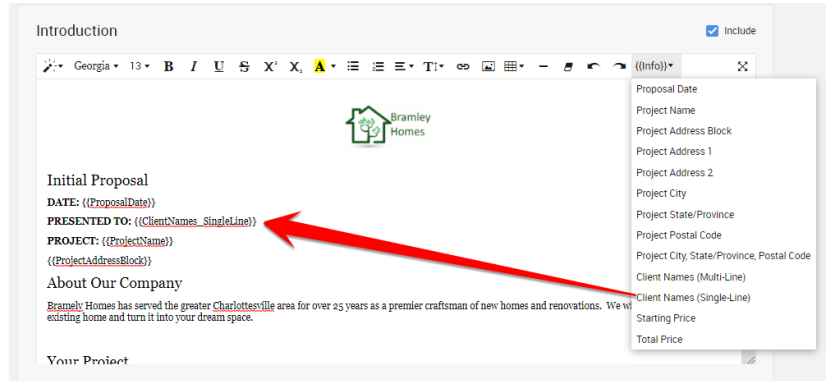
The screenshot shows a 'Make Choice' dialog box. The selection is '4110 Chimney Material'. The client information section asks to 'Please specify' and lists '- Material' and '- Color'. The allowance is \$1,000.00 and the price is TBD. The choice field contains the text 'Red brick in [emph] bond with white wash'. There are 'Cancel' and 'Make Choice' buttons at the bottom.

The screenshot shows a 'Make Choice' dialog box. The selection is '4010 Optional Roofing Material Upgrades'. The client information section asks to 'Please specify your choice of roofing material.' and lists 'Included: - 30 Year Traditional Asphalt Shingles - Your choice of 4 colors'. The available options are 'Upgrade to Architectural Shingles' and 'Upgrade to roofing of your choice'. The choice field has three radio button options: #1 Roof, as quoted (Price: \$0.00), #2 Upgrade: Stone-coated steel (Price: \$4,887.50), and #3 Upgrade: Copper roofing (Price: \$12,325.00). There are 'Cancel' and 'Make Choice' buttons at the bottom.

Proposal Tools

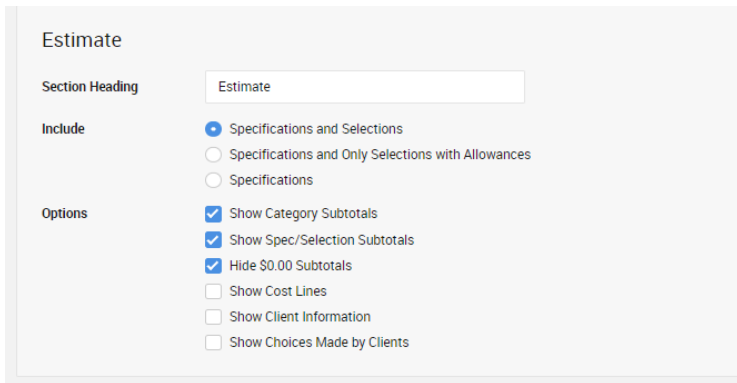
PROJECT INFO FIELDS

Leverage information from your project (Client names, project address, etc.) to quickly fill in important details.



Learn More: [Inserting & Customizing Project Data](#)

PRICING DETAIL OPTIONS

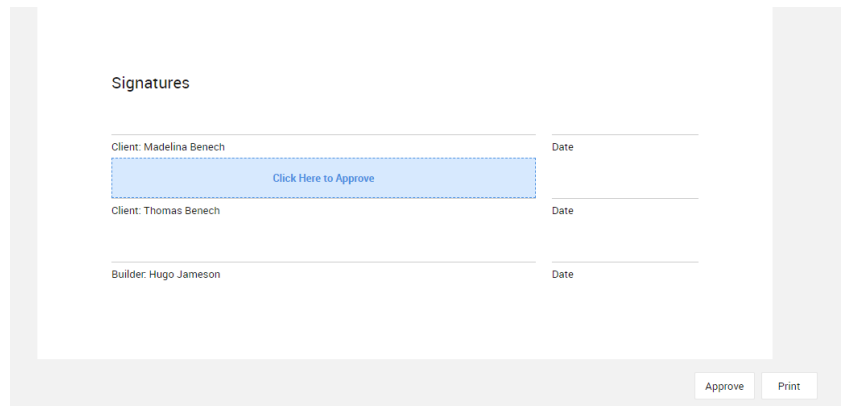


Determine what level of cost breakdown ranging all the way from just the grand total down to every cost line!

Learn More: [Displaying Cost Details on Proposals](#)

ELECTRONIC DELIVERY & SIGNATURE

Send proposals electronically to any clients attached to the project PLUS request an electronic signature for approval



Learn More: [Requesting Electronic Signatures](#)

TEMPLATES

Save common proposal/contract language in templates for future use + create templates for all types of proposals/contracts/agreements.

Additional Resources: [CoConstruct Community](#) + [Upcoming Webinars](#)