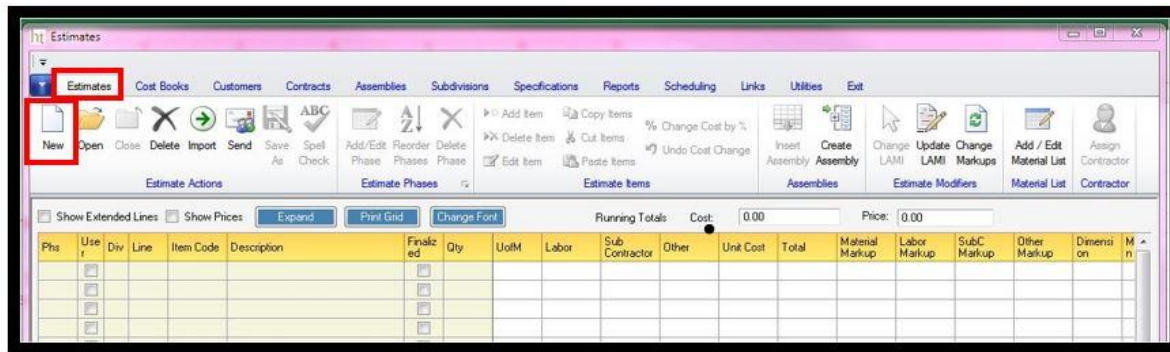


STEPS TO CREATING AN ESTIMATE

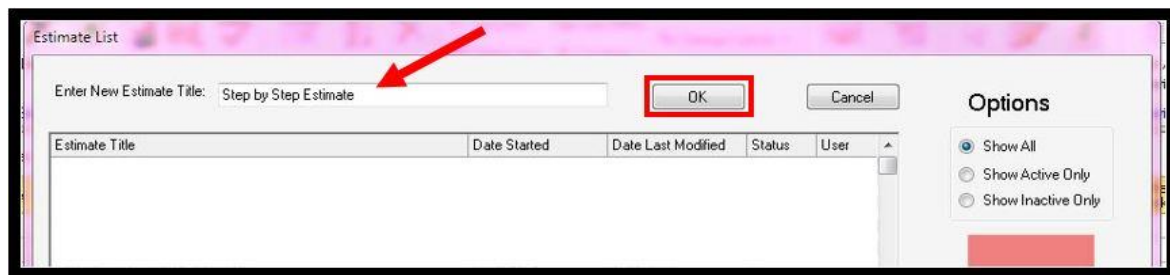
This tutorial will cover the basic step by step instructions to starting and finishing an estimate.

STEP ONE STARTING

To start a new estimate be sure you are in the 'Estimate' tab. Select the 'New' option



Give your estimate a title, and click 'Ok'



Indicate if this is a new customer or an existing customer and select 'Continue'



Be sure your customers information is fill out completely from their name to their zip code as shown in picture 1 on the left. This will keep from getting errors later on code to prevent getting errors later on in the process of creating your estimate.

PIC 1: ENTER CUSTOMER INFORMATION FOR NEW ESTIMATE. CLICK SAVE WHEN DONE

Buttons: New, Edit, Delete, Cancel, Save

Fields: First Name, Last Name, Company, Address, City, State, Zip, Phone, Phone 2, Phone 3, FAX, E-mail, Notes

☐ Inactivate Client

PIC 2: CUSTOMER ESTIMATES

Estimate Name	Address 1	Address 3	City

ENTER NEW ESTIMATE JOB SITE INFORMATION

Estimate Title: Step by Step Estimate X Use Customer Information

Site Address:

Site City, St, Zip:

Site Phone 1: Site Phone 3:

Site Phone 2: Site FAX:

Site E-mail:

☐ Currently Applied Local Area Modifier:

Start Date: Finish Date:

Notes:

Material	Labor	Sub C	Other	Overhead	Profit
50.00	50.00	50.00	50.00	0.00	0.00

PIC 1

PIC 2

If the job site address is the same as the address you entered in pic. 1 than mark the box as shown in Pic 2. If it is not the same enter the job site address

The Advantage program by default has the markup set at 50% you can change them in the default settings and all estimates created after will have the new markups There are four different locations you can change your markups. The first being when you create your client you can change markups on just one client. At the bottom of PIC 2 is where you would change the markups.

Material	Labor	Sub C	Other	Overhead	Profit
50.00	50.00	50.00	50.00	0.00	0.00

If you are satisfied with your estimate click the 'Save' option located in the middle column.

ENTER CUSTOMER INFORMATION FOR NEW ESTIMATE. CLICK SAVE WHEN DONE

Buttons: New, Edit, Delete, Cancel, Save

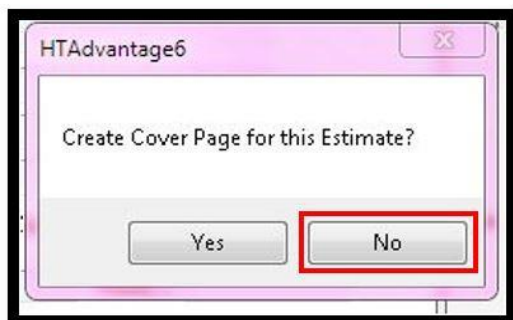
Fields: First Name, Last Name, Company, Address, City, State, Zip, Phone, Phone 2, Phone 3, FAX, E-mail, Notes

☐ Inactivate Client

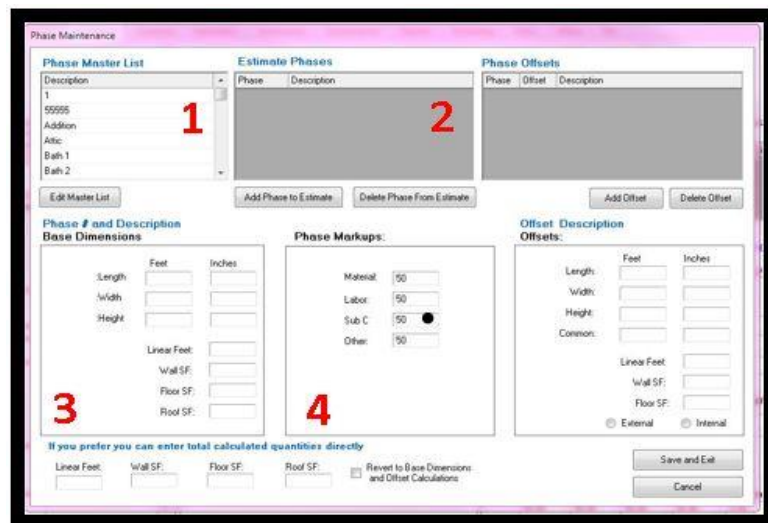
Save Complete, click 'Ok'



The next box is asking if you would like to create a cover page for this estimate I would recommend selecting 'No' at this time. If you have not set up your default cover page than any editing you do now you will have to do again to the default once this estimate is closed. For more info on setting up your cover page please visit us at www.HomeTechAdvantage.com for the tutorial



STEP TWO PHASES



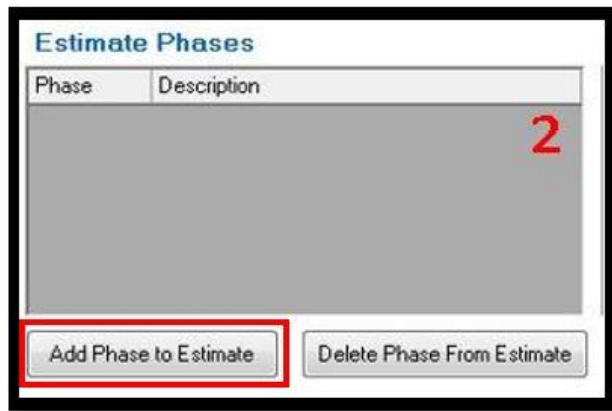
The box showing is the 'Phase Maintenance' window. Once closed it can be opened for editing at anytime by clicking the 'Add/Edit Phase' option in the 'Estimate' tab.

This is where you will create your phases for each estimate. It is not recommended but suggested that you create your phase's room by room rather than one phase being the entire house

Box 1 is the phase description. You can select one from the pre named list or you can create your own by clicking on 'Edit Master List'



Once you have selected your phase title click 'Add Phase to Estimate' located under Box 2



In Box 3 is where you will enter the base dimensions. Let say our room is 8ft x 9ft x8ft You would enter 8 for the Length, 9 for the Width, and 8 for the Height as shown in box Linear Feet will be filled in for you.

Phase # and Description
Base Dimensions

	Feet	Inches
:Length	8	
:Width	9	
:Height	8	
Linear Feet:		
Wall SF:		
Floor SF:		
Roof SF:		

3

In Box 4 is the second location to change your markups. If you change them here you will only be changing them for this one phase you are currently working on.

Phase Markups:

Material:	50
Labor:	50
Sub C:	50
Other:	50

4

If you are satisfied click 'Save and Exit' at the bottom right corner.

Floor SF:

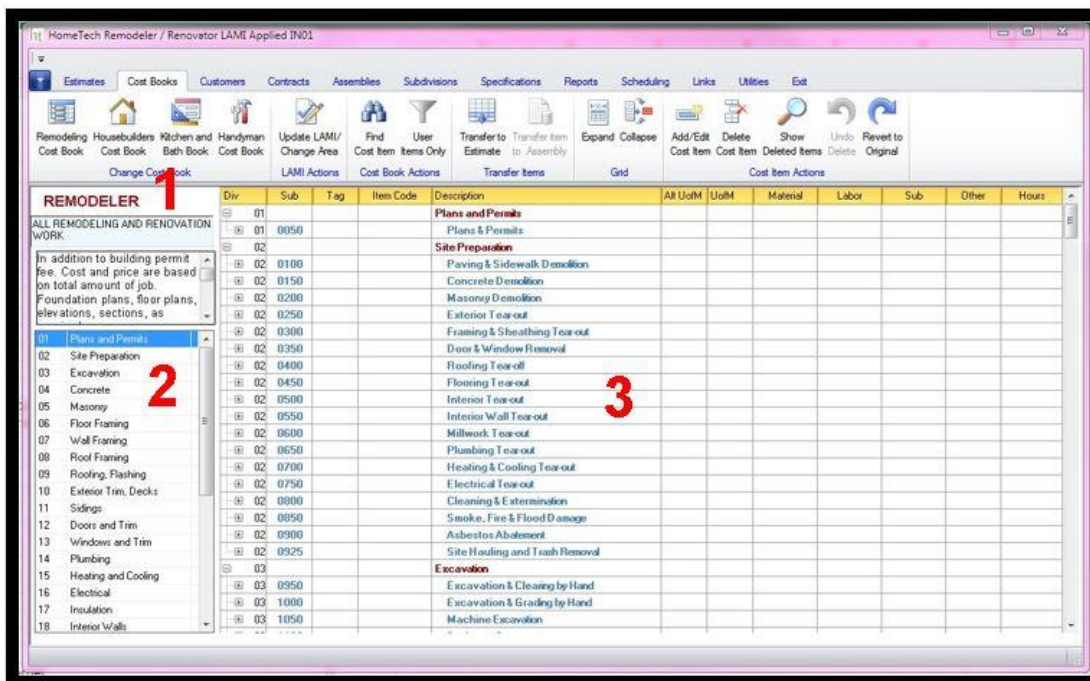
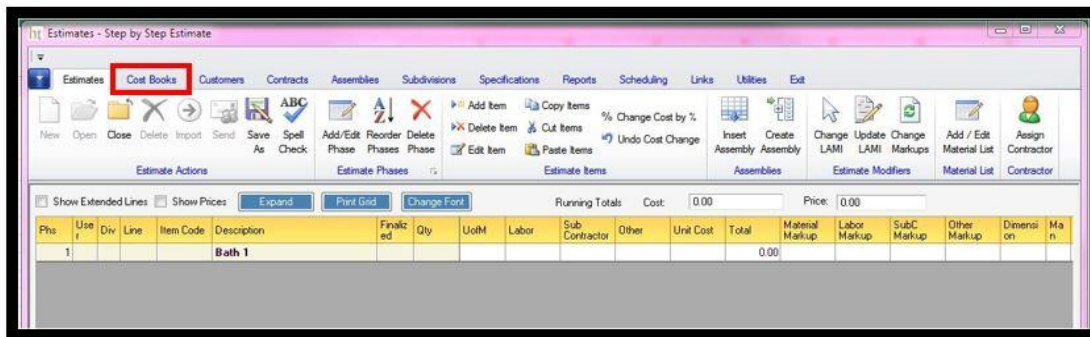
☐ External ☐ Internal

Save and Exit

Cancel

STEP THREE BUILDING YOUR ESTIMATE

The estimate grid should look like the picture below, containing just the name of your phase. Your next step is to build it up with cost items. Click on the 'Cost Book' tab



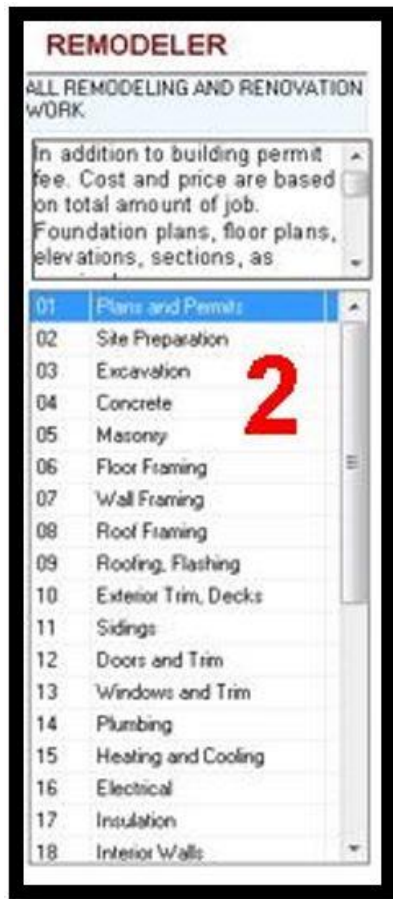
The 'Cost Book' tab is a data base of cost items you can use to build your estimate.

1 - Select the cost book you will be working with.

a. Remodeling b Housebuilders c Kitchen and Bath d Handyman



2. Box 2 is a list of divisions. Click on a division to view cost items relating to that division



3. Box 3 is where you will find the cost items separated by subdivisions. You can use the 'Expand' option to open up each subdivision allowing all cost items to show. Tag the items you want to transfer to the estimate and select 'Transfer to Estimate'

Div	Sub	Tag	Item Code	Description
01				Plans and Permits
01	0050			Plans & Permits
02				Site Preparation
02	0100			Paving & Sidewalk Demolition
02	0150			Concrete Demolition
02	0200			Masonry Demolition
02	0250			Exterior Tear-out
02	0300			Framing & Sheathing Tear-out
02	0350			Door & Window Removal
02	0400			Roofing Tear-out
02	0450			Flooring Tear-out
02	0500			Interior Tear-out
02	0550			Interior Wall Tear-out
02	0600			Milwork Tear-out
02	0650			Plumbing Tear-out
02	0700			Heating & Cooling Tear-out
02	0750			Electrical Tear-out
02	0800			Cleaning & Extermination
02	0850			Smoke, Fire & Flood Damage
02	0900			Asbestos Abatement
02	0925			Site Hauling and Trash Removal
03				Excavation
03	0950			Excavation & Clearing by Hand
03	0950		03.0000	Excavation by hand & wheel dirt/gravel/topsoil
03	0950		03.0010	Excavation by hand & wheel clay/loose rock
03	0950		03.0020	Excavate frozen soil by hand
03	0950		03.0030	Excavation by hand, difficult
03	0950		03.0050	Excavate crawl space, easy access
03	0950		03.0060	Excavate crawl space, difficult access
03	0950		03.0070	Lower basement floor, easy access
03	0950		03.0080	Lower basement floor, difficult access
03	0950		03.0100	Clear 8" tree with chainsaw
03	0950		03.0110	Clear 12" tree with chainsaw
03	0950		03.0120	Clear 18" tree with chainsaw
03	0950		03.0130	Clear 24" tree with chainsaw

COLLAPSED

EXPANDED

At this point your estimate should look like the picture below

Estimates - Step by Step Estimate

Estimates Cost Books Customers Contracts Assemblies Subdivisions Specifications Reports Scheduling Links Utilities Exit

Running Totals: Cost: 6,002.75 Price: 5,004.15

Ph	Use	Div	Line	Item Code	Description	Finalized	Qty	Unit	Labor	Sub Contractor	Other	Unit Cost	Total	Material Markup	Labor Markup	SubC Markup	Other Markup	Dimension	M
					Bath 1														
			01		Plans and Permits														
			01	100 01.0000	Plans, on-site survey, no		1.00	EA				200.00	200.00		50.00	50.00	50.00	50.00	
			01	200 01.0010	Per \$1,000 of contract amount,			-SM				10.00	10.00		50.00	50.00	50.00	50.00	
			01	300 01.0000	Building permit fee		1.00	EA				50.00	50.00		50.00	50.00	50.00	50.00	
			02		Site Preparation								607.12						
			02	100 02.3070	Remove resident tile or sheet goods		72.00	SF	0.43			0.43		50.00	50.00	50.00	50.00	50.00	Floor
			02	200 02.3070	Remove gypsum drywall ceiling		72.00	SF	0.43			0.43		50.00	50.00	50.00	50.00	50.00	Ceiling
			02	300 02.3400	Remove gypsum drywall from wall			SF	0.32			0.32		50.00	50.00	50.00	50.00	50.00	
			02	400 02.4070	Remove toilet		1.00	EA	122.20			122.20		50.00	50.00	50.00	50.00	50.00	
			02	500 02.4090	Remove steel tub		1.00	EA	300.80			300.80		50.00	50.00	50.00	50.00	50.00	
			02	600 02.4130	Remove wall/hung or pedestal		1.00	EA	122.20			122.20		50.00	50.00	50.00	50.00	50.00	
			14		Plumbing								3083.86						
			14	100 14.2020	Replace 1 piece toilet, white		1.00	EA	496.20			496.20		50.00	50.00	50.00	50.00	50.00	
			14	200 14.2070	Replace with steel tub		1.00	EA	895.35			1,489.35		50.00	50.00	50.00	50.00	50.00	
			14	300 14.2320	Replace lavatory in vanity, 21" x		1.00	EA	320.78			717.58		50.00	50.00	50.00	50.00	50.00	
			15		Electrical								568.42						
			15	100 15.1090	Ground fault outlet (GFC)		1.00	EA	101.70			101.70		50.00	50.00	50.00	50.00	50.00	
			15	200 15.1150	Single pole switch		1.00	EA	56.50			72.35		50.00	50.00	50.00	50.00	50.00	

STEP FOUR CONTRACTS

Click on the 'Contracts' tab if you wish to include a contract with your estimate. The Advantage 6 program comes with nine contract templates you can choose from or if you have your own contract you can copy and paste it right in to our program. To learn how to use a contract in your estimate please visit our web site for the tutorial. www.HomeTechAdvantage.com

Contracts

Estimates Cost Books Customers **Contracts** Assemblies Subdivisions Specifications Reports Scheduling Links Utilities Exit

Contracts Merge Fields

TEMPLATE CONTRACTS

- Change Order Form
- Construction Contract Proposal
- Contract Proposal With Block Specification
- Pre-Completion Punch List
- Pre-Construction Conference
- Pre-Construction Conference Agreement
- Right of Revision
- Warranty
- Warranty Checklist

ESTIMATE CONTRACTS

Contract Name

Construction Contract Proposal

We herewith submit proposal for materials and labor to be supplied at the sole request and order of

Cori Cori
55 Cori
Cori, CA 92562

hereinafter referred to as "OWNER" for work to be performed at premises set forth below, according to the following terms and specifications:

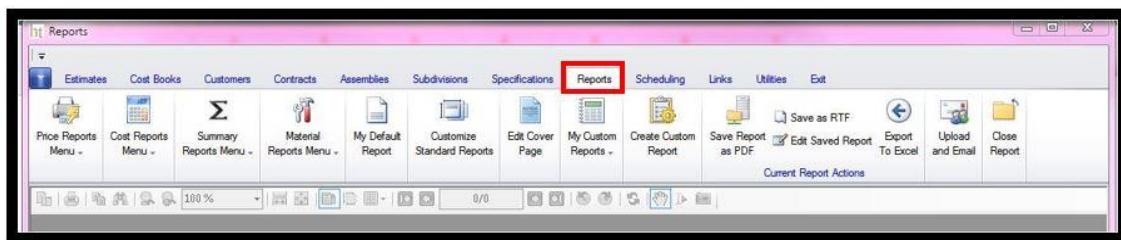
55 Cori
Cori, CA 92562

(Specifications are in a separate section of this proposal.)

1/1 PAGE 1 of 1 1 1 NUM 100%

STEP FIVE REPORTS

Next choose a report from the 'Reports' tab. The report is your actual estimate transformed into a more professional looking bid you can email to your client. Once you have selected your report you can choose to preview it. If you are satisfied you can save it or upload and email it to your client.



This is just the basic step by step to starting an estimate. Visit our website for more detail directions on any section you are not sure about. If the area in which you are unsure about is not listed in a tutorial scroll down to the bottom of the video page to request the tutorial. Tech Support will have one made and emailed to you as soon as possible.

www.HomeTechAdvantage.com

