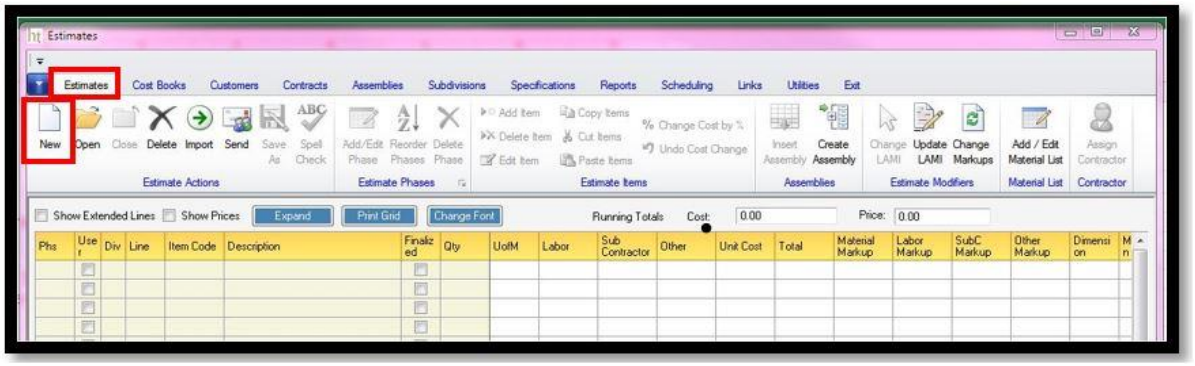
STEPS TO CREATING AN ESTIMATE

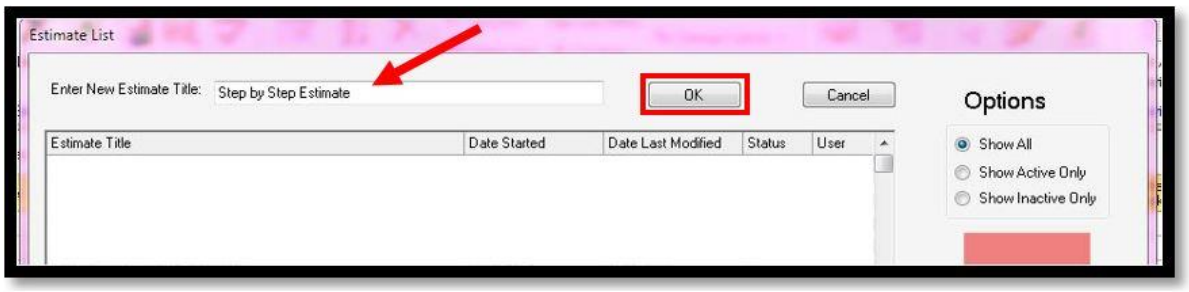
This tutorial will cover the basic step by step instructions to starting and finishing an estimate.

STEP ONE STARTING

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

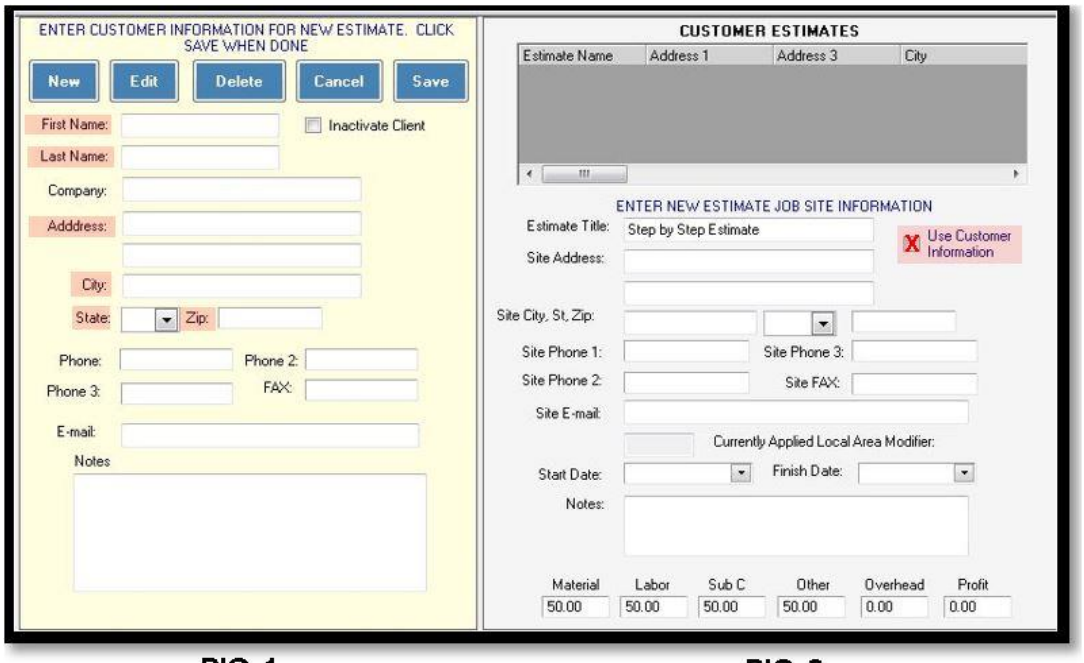


Give your estimate a title, and click 'Ok'



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 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.

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

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

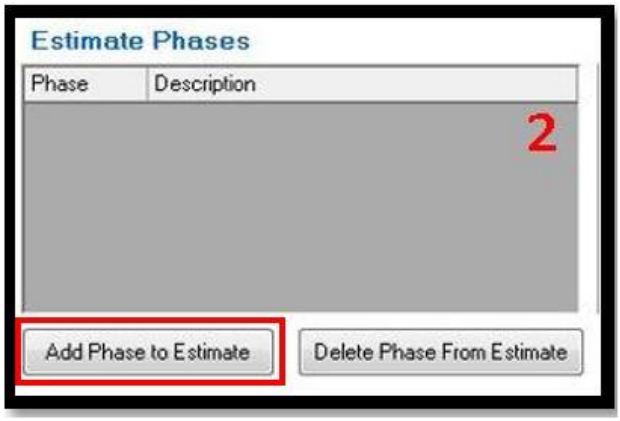
STEP TWO PHASES

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.

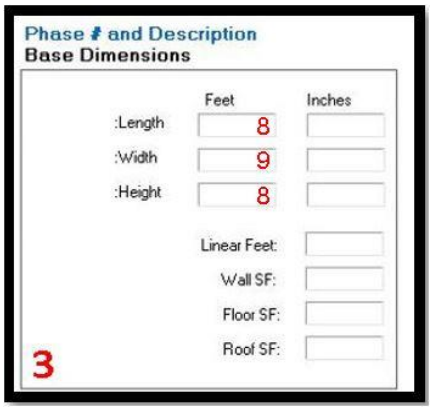
This is where you will create your phases for each estimate. It is not recommended but suggested that you create your phase's room by room rather than one phase being the entire house

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.

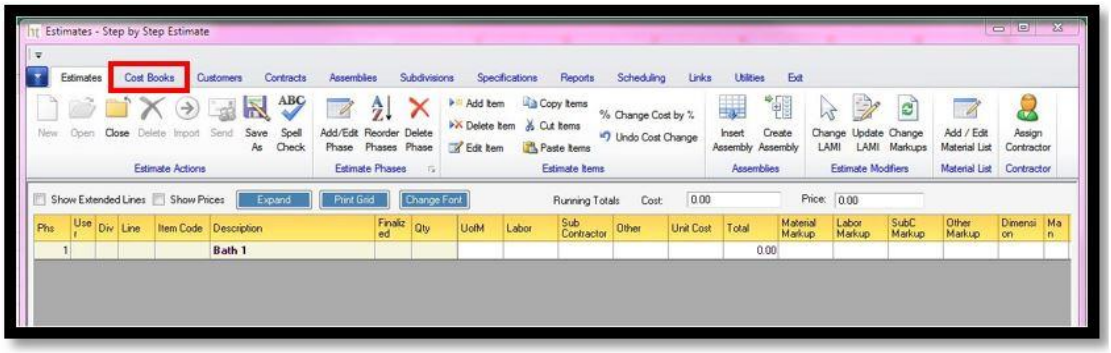


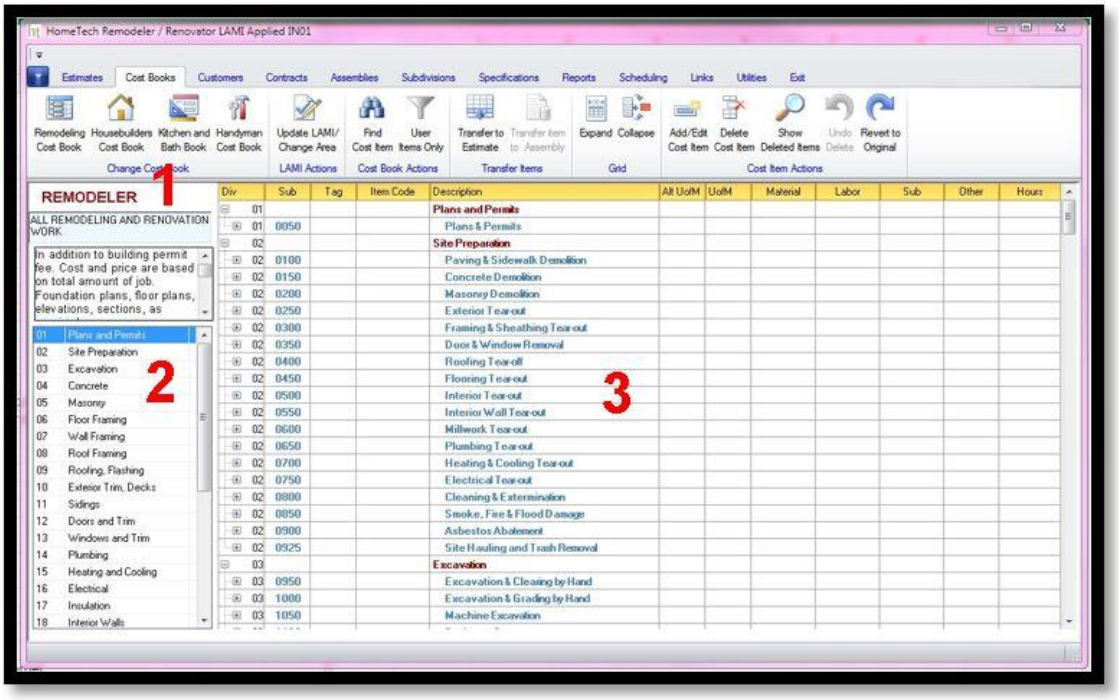
In Box 4 is the second location to change your markups. If you change them here you will only be changing them for this one phase you are currently working on.

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

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



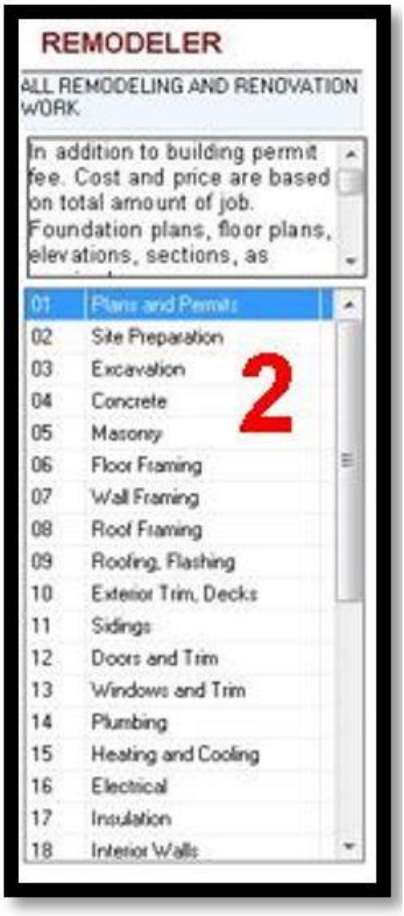


The 'Cost Book' tab is a data base of cost items you can use to build your estimate.

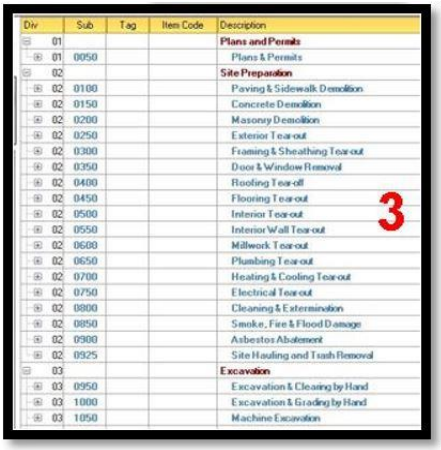
1 - Select the cost book you will be working with.

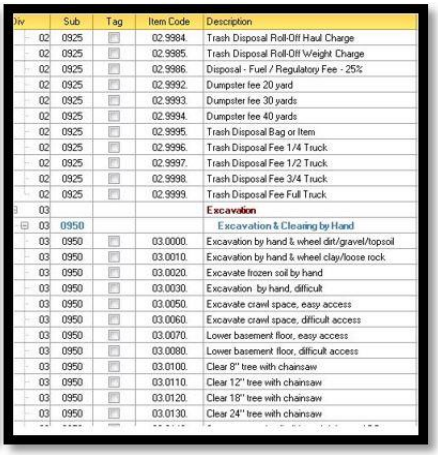
a. Remodeling **b** Housebuilders **c** Kitchen and Bath **d** Handyman

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



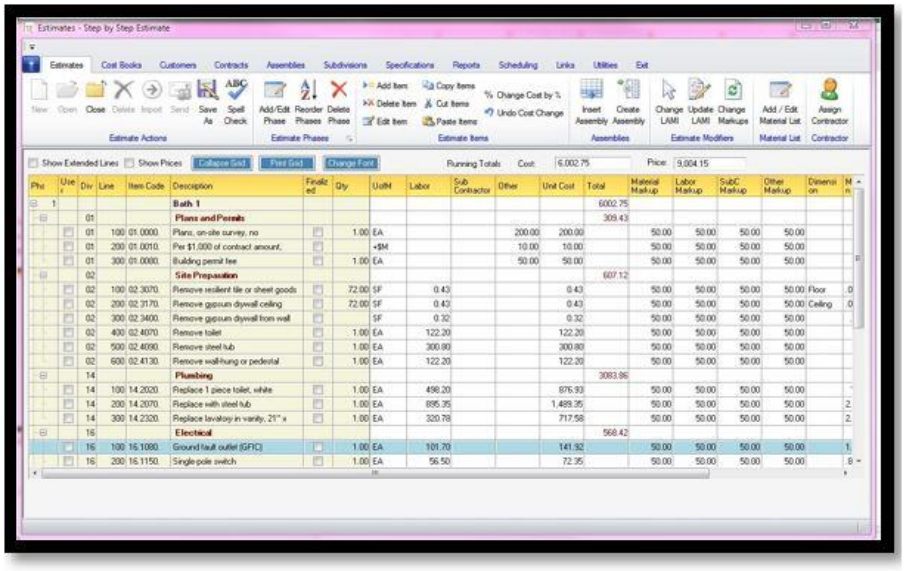
3. Box 3 is where you will find the cost items separated by subdivisions. You can use the 'Expand' option to open up each subdivision allowing all cost items to show. Tag the items you want to transfer to the estimate and select 'Transfer to Estimate'





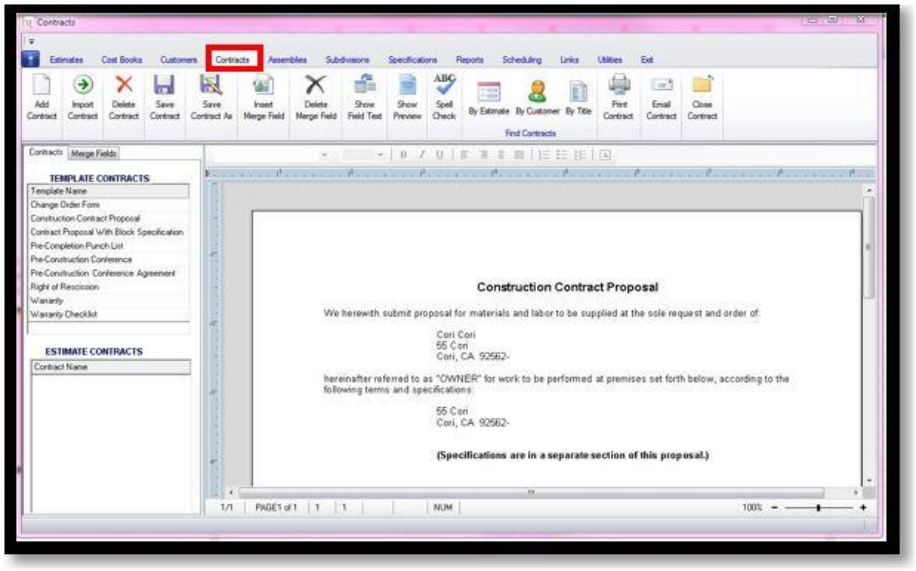
COLLAPSED EXPANDED

At this point your estimate should look like the picture below



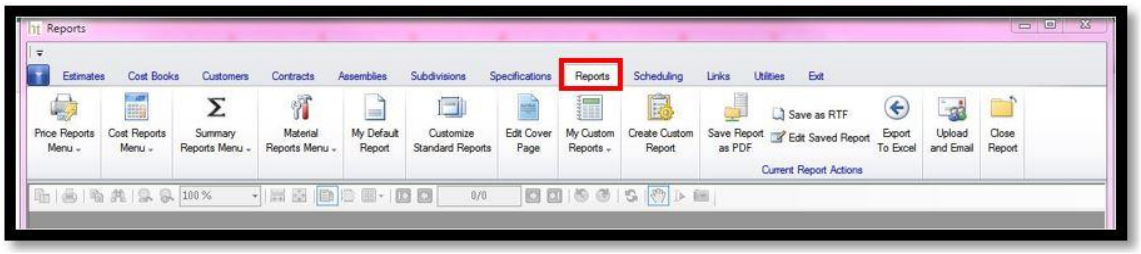
STEP FOUR CONTRACTS

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



STEP FIVE REPORTS

Next choose a report from the 'Reports' tab The report is your actual estimate transformed in to 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