

Merging a Template Estimate into a PCO Estimate


1. Click on the **Estimate Center**  icon.



Search 

- 1.1. Type in the Estimate Description of the Template Estimate in the Search field located in the upper-right hand corner of screen to find the Estimate.






Note: Search can be used with the Project Number, LLW, NOD Number, Estimate Description, Contract Number, etc. or use the Filter by Estimate Type = PCO.

- 1.2 Click on the pencil icon  located inside the Estimate Tile of the PCO Estimate.



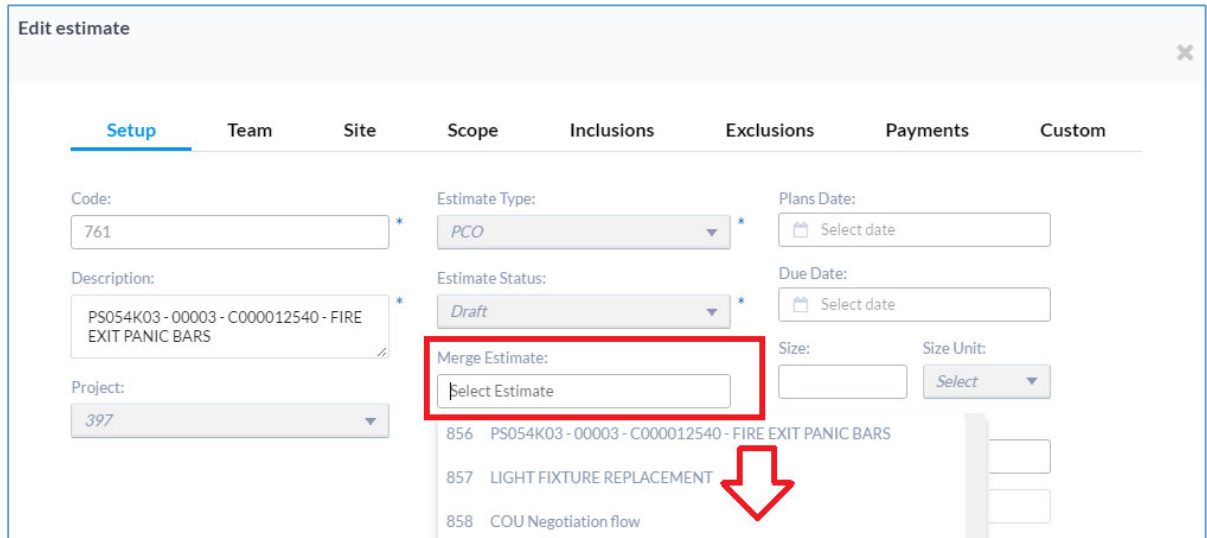
PS054K03 - 00003 -
C000012540 - FIRE EXIT
PANIC BARS

Code: 670
Estimate Type: PCO
Project: 397
Version: 1
Status: Estimating
Due Date:
Owner: MARIA GOMEZ

Cost Estimating System: How to Merge an Template Estimate into a PCO Estimate (for GC/Subs)

- 1.3 In the **Edit estimate** popup, find the **Merge Estimate** field located in the middle column and double-click.



Edit estimate

Setup Team Site Scope Inclusions Exclusions Payments Custom

Code: 761 Estimate Type: PCO Plans Date: Select date

Description: PS054K03 - 00003 - C000012540 - FIRE EXIT PANIC BARS Estimate Status: Draft Due Date: Select date

Project: 397 Merge Estimate: Select Estimate Size: Size Unit: Select

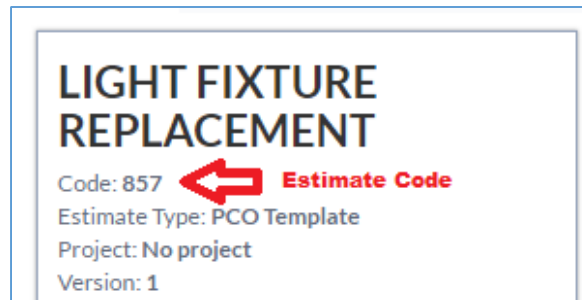
856 PS054K03 - 00003 - C000012540 - FIRE EXIT PANIC BARS

857 LIGHT FIXTURE REPLACEMENT

858 COU Negotiation flow

- 1.4 In the Merge Estimate field, type in the Template Estimate.

Note: Typing in keywords or the Estimate Code in the Merge Estimate field will help find the Template Estimate easier.



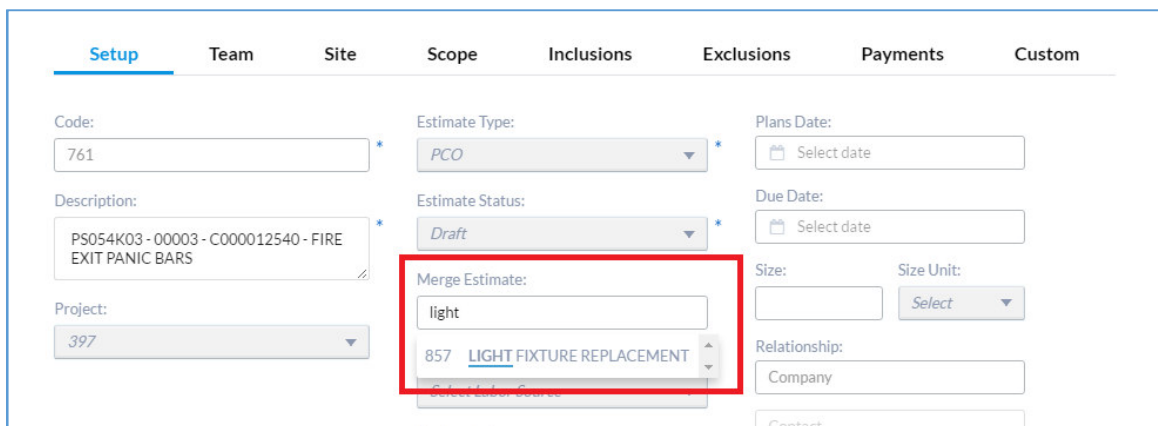
LIGHT FIXTURE REPLACEMENT

Code: 857 ← Estimate Code

Estimate Type: PCO Template

Project: No project

Version: 1



Setup Team Site Scope Inclusions Exclusions Payments Custom

Code: 761 Estimate Type: PCO Plans Date: Select date

Description: PS054K03 - 00003 - C000012540 - FIRE EXIT PANIC BARS Estimate Status: Draft Due Date: Select date

Project: 397 Merge Estimate: light Size: Size Unit: Select

857 LIGHT FIXTURE REPLACEMENT

Relationship: Company

Contact



Cost Estimating System: How to Merge an Template Estimate into a PCO Estimate (for GC/Subs)

- 1.5 Once the Template Estimate is selected inside the Merge Estimate field, click on the **Save Estimate** button.

Edit estimate

Setup Team Site Scope Inclusions Exclusions Payments Custom

Code: 761 * Estimate Type: PCO * Plans Date: Select date

Description: PS054K03 - 00003 - C000012540 - FIRE EXIT PANIC BARS * Estimate Status: Draft * Due Date: Select date

Project: 397 Merge Estimate: 857 LIGHT FIXTURE REPLACEMENT

Estimate Labor Source: Select Labor Source Relationship: Company

Update Estimate: None Contact

Size: Size Unit: Select

Save Estimate * required fields

- 1.6 All the line items from the Template Estimate will be copied into the new Estimate.

Estimate 761 : PS054K03 - 00003 - C000012540 - FIRE EXIT PANIC BARS Total Estimate: \$317,914 Status: Draft Type: PCO

Documents Estimate Takeoff Sort Types Tasks Summary group by trade specialty Search

Code	Description	Quantity	Unit	Labor Total	Labor Rate	Equipment Cost	Equipment Total	Unit Cost	Tot	Assigned	LLW	Trade Specialty
	Add New Item	Select			Straight T...					None	None	None
	Insulation Sub-Contractor			64,314.00	Select				194,314.00	Select	None	Insulation SubC...
15500.15650.00961	COU CHILLER - Chiller Suction And Oil Pressure Gauges With Sh	200.00	EA	21,438.00	Straight T...			307.19	61,438.00	Select	None	Insulation SubC...
15500.15660.00761	COU CHILLER - Chiller Supply and Return Header Temperature S	100.00	EA	10,719.00	Straight T...			257.19	25,719.00	Select	None	Insulation SubC...
15500.15660.00961	COU CHILLER - Chiller Control Panel - Temperature Controls (En	300.00	EA	32,157.00	Straight T...			357.19	107,157.00	Select	None	Insulation SubC...
	No Sort Type				Select				123,600.00	Select	Select	Select
15400.15410.00180	AE - Chilled water piping	130.00	LF		Straight T...			370.00	48,100.00	CRUZ CONCR...	None	None
15400.15410.00210	AE - 8" Steam/chilled water piping	170.00	LF		Straight T...			230.00	39,100.00	CRUZ CONCR...	None	None
15400.15410.01010	AE - 10" Steam/chilled water piping	140.00	LF		Straight T...			260.00	36,400.00	CRUZ CONCR...	None	None

Note: The Assigned column of the merged items will be **None**. It is recommended that the inviting/assigning of additional GC Assist Estimators, Sub Contractors, etc. be done **after** the Merge is completed.