


Merge (copying) a pre-existing Estimate to a new Estimate

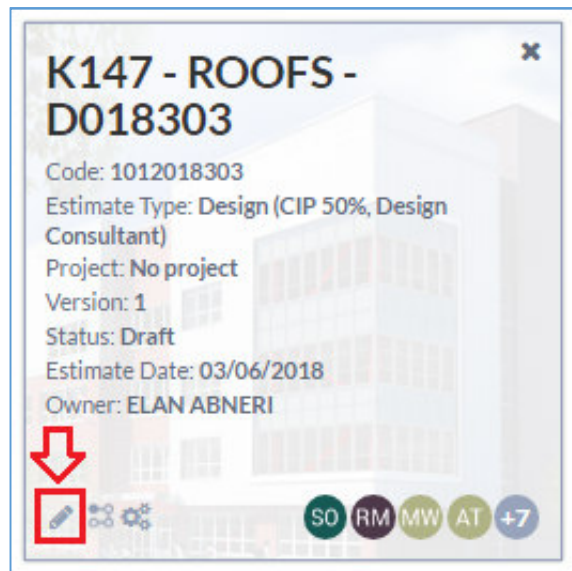
1. Click on the **Estimate Center**  icon.

- 1.1. Type in the Design Number in the Search field  located in the upper-right hand corner of screen to find the Estimate that will be the copy.

Note: Search can be used with the Design Number, LLW, School Code, Building ID, Estimate Description, etc.

Make a note of the Estimate Code and/or Estimate Description.

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





Cost Estimating System: How to Merge an Estimate

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

The screenshot shows the 'Edit estimate' popup with the following fields:

- Code: 1012018303
- Estimate Type: Design (CIP 50%, Design Consultan...)
- Plans Date: Select date
- Description: K147 - ROOFS - D018303
- Estimate Status: Draft
- Estimate Date: 03/06/2018
- Project: None
- Merge Estimate: Select Estimate (highlighted with a red box and a red arrow)
- Estimate Labor Source: Select Labor Source
- Update Estimate: None
- Size: [empty]
- Size Unit: Select
- Relationship: Company
- Contact: [empty]

Buttons: Save Estimate, * required fields

- 1.4 Type in the Estimate that you want to copy from.

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

The screenshot shows the 'Edit estimate' popup with the following fields:

- Code: 1012018607
- Estimate Type: Design (CIP 50%, Design Consultan...)
- Plans Date: Select date
- Description: Q998 - FY18 SCA A7E BUILDOUT - D018607
- Estimate Status: Draft
- Estimate Date: Select date
- Project: None
- Merge Estimate: SCA A7E (with a red arrow pointing to it)
- Estimate Labor Source: [empty]
- Update Estimate: [empty]
- Size: [empty]
- Size Unit: Select
- Relationship: [empty]
- Contact: [empty]

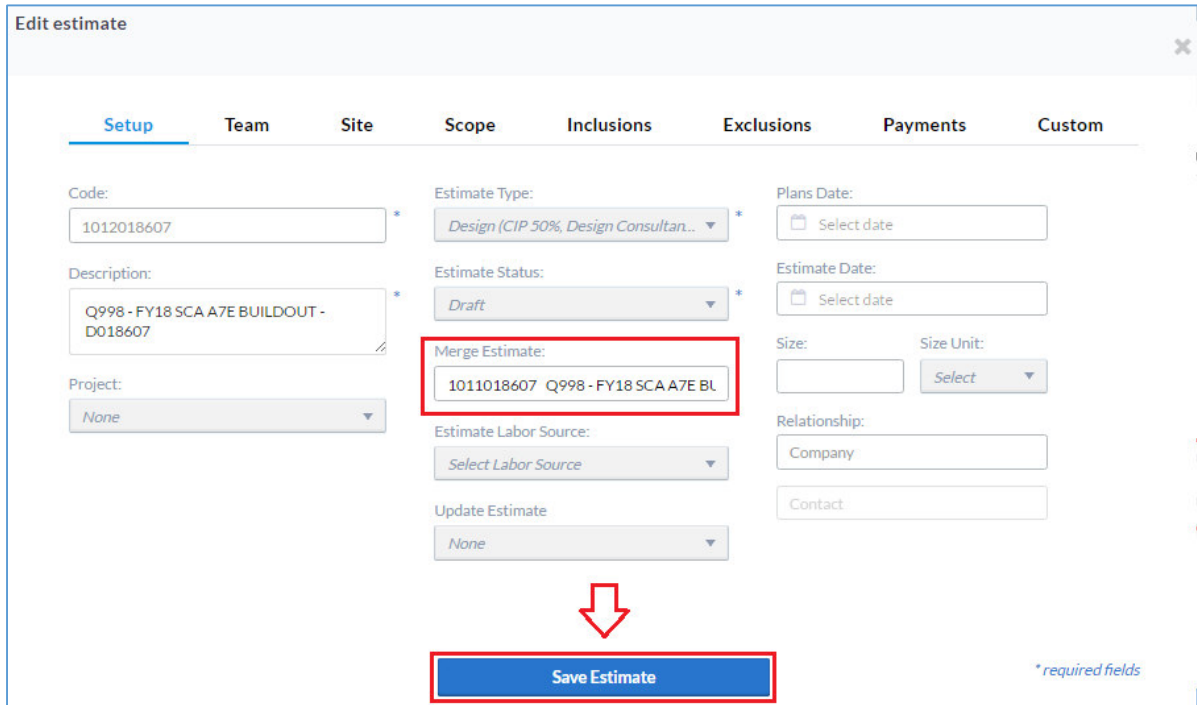
Search Results (highlighted in a red box):

1011018607	Q998 - FY18 SCA A7E BUILDOUT - D018607
1012018607	Q998 - FY18 SCA A7E BUILDOUT - D018607

Buttons: Update Estimate, Contact

Cost Estimating System: How to Merge an Estimate

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

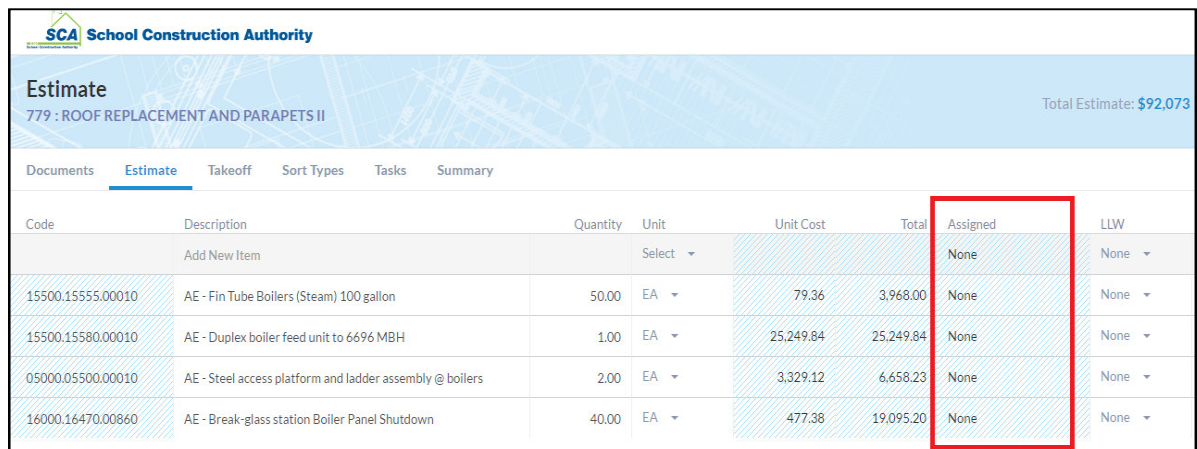


The screenshot shows the 'Edit estimate' interface with the following fields:

- Code: 1012018607
- Estimate Type: Design (CIP 50%, Design Consultan...)
- Plans Date: Select date
- Description: Q998 - FY18 SCA A7E BUILDOUT - D018607
- Estimate Status: Draft
- Estimate Date: Select date
- Project: None
- Merge Estimate: 1011018607 Q998 - FY18 SCA A7E BL (highlighted in red)
- Estimate Labor Source: Select Labor Source
- Update Estimate: None
- Size: [] Size Unit: Select
- Relationship: Company
- Contact: []

A red arrow points from the 'Merge Estimate' field to the 'Save Estimate' button at the bottom of the form.

- 1.6 All the line items from the Scope Estimate will be copied into the Design Estimate.



The screenshot shows the 'Estimate' summary table for '779 : ROOF REPLACEMENT AND PARAPETS II' with a total estimate of \$92,073. The table has the following columns: Code, Description, Quantity, Unit, Unit Cost, Total, Assigned, and LLW. The 'Assigned' column is highlighted in red.

Code	Description	Quantity	Unit	Unit Cost	Total	Assigned	LLW
	Add New Item		Select			None	None
15500.15555.00010	AE - Fin Tube Boilers (Steam) 100 gallon	50.00	EA	79.36	3,968.00	None	None
15500.15580.00010	AE - Duplex boiler feed unit to 6696 MBH	1.00	EA	25,249.84	25,249.84	None	None
05000.05500.00010	AE - Steel access platform and ladder assembly @ boilers	2.00	EA	3,329.12	6,658.23	None	None
16000.16470.00860	AE - Break-glass station Boiler Panel Shutdown	40.00	EA	477.38	19,095.20	None	None

Note: The Assigned column will be **None**. It is recommended that the assigning of additional Assist Estimators, Sub Consultants, etc. be done after the Merge is completed.