

Create your Estimate

Summary

This tutorial covers how to create and manage estimates in BuilderPal to plan project costs effectively. Accurate estimates help in budgeting, resource allocation, and ensuring project profitability.

Prerequisites

- An active BuilderPal account.
- An existing project or create a new one in BuilderPal.
- Access to the Site Office section.

Steps

1. **Navigate to the Estimate section.** Go to app.builderpal.com, create a new project or select an existing one (e.g., "Middleschool Staircase Renovation"), then click **Site Office** followed by **Estimate**.



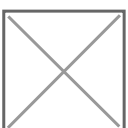
2. **Edit the estimate name.** Click the edit icon in the "Selected Estimate" card, enter the desired name (e.g., "Estimate Draft"), and click **Save**.



3. **Create a new estimate if needed.** Click **Change** at the top, select **Create**, enter the name (e.g., "Estimate For The Future"), click **Save**, then click **Select Estimate** to switch to it.



4. **Add a cost item.** Click **Add Cost Item**, select a cost code (e.g., "Carpentry"), and click **Next**.



5. **Enter cost item details.** Provide the title (e.g., "Carpenter Tools"), amount (e.g., "\$1000"), markup amount (e.g., "15%"), and other relevant fields, then click **Save**.



6. **Export the quote.** Once all items are added, click **Export Quote** to generate a document listing your estimate items.



FAQ

What if I can't find the Estimate section? Ensure you're in the **Site Office** view within a project. If it's missing, check your role permissions or contact support.

Can I add custom cost codes? Yes, you can import or create custom cost codes during the "Add Cost Item" process if the desired code isn't listed.

How do I delete an estimate item? Navigate to the estimate, select the item, and use the delete option in the edit menu.

What happens if I change the markup type? Switching between percentage and fixed amount will recalculate the total cost automatically based on the new markup.

Is there a limit to the number of estimates per project? No, you can create multiple estimates for comparison or different scenarios within the same project.

Related Articles

- [Manage your Budget](#)
- [Create Cost Codes / Divisions](#)

Metadata

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