



# The Takeoff Doctor Instant Estimator 2010.07

## Instructions

**Overview** To ensure best results, follow the steps below to create a new estimate.

- 1 Save this workbook with a different name. I use the Job Name, followed by the date in this format: YYYY.MM.DD. This insures my newest version of an estimate is always the last file listed, when sorted alphabetically. IF you already have pricing you know you can trust, I'd recommend entering that FIRST, then saving the workbook to a different name to use as your template.
- 2 Go to the Measurements tab. Unprotect the sheet (**Tools->Protection->Unprotect Sheet**). Just click Enter, there is no Password. This process applies to all sheets. Enter the Job Name where indicated at the top of the sheet. This will update the Job Name on all other sheets. (Note: You can unprotect all sheets, then save the original workbook to use for your template. I only recommend this for very advanced Excel users, to avoid accidentally erasing formulas.)
- 3 Enter the SF and LF measurements needed in each of the light blue cells on the Measurements sheet. All of the white cells contain formulas, and will calculate automatically when you enter info in the blue cells.
- 4 Go to the Specs tab, and enter the info requested there. You may or may not have to unprotect this sheet, depending on which info you decide to change. For example, a default estimate of the LF of 1st Floor Interior Walls is calculated based on the SF of the 1st Floor. If you don't want to take the time to measure the walls, or are working off of a sketch without dimensions, you may want to stick with the default value. For a more accurate estimate, you would want to change the value in column B to an actual measurement. Whenever you change one of these formulas, the number in the Value column will turn red. This lets you know you have overridden the formula for that cell.
- 5 Any cell on the Specs sheet that doesn't require a number entry will have a dropdown box with all of the valid selections you can make for that item.
- 6 Go to the Takeoff tab. You can change any values in the Notes or Cost columns (light blue cells) without unprotecting the sheets. If you want to change any other info, or insert lines for additional items, you will need to unprotect.
- 7 To add a line to the Takeoff sheet, don't use Excel's Insert Line feature. Copy an existing line, preferably one with the same formula/quantity as your new item, and insert it within the existing table.
- 8 (Important) This is very important, and one of the most common mistakes I see. You have to insert the copied row somewhere BELOW the first item row, and ABOVE the last item row. In other words, within the existing table. If you insert anything before the first line, or after the last line, it will appear to work, but will NOT be calculated in the Total Cost.
- 9 Once you have made all the changes to your Takeoff sheet, you can send it out to your suppliers to price. I would filter or hide rows so that each supplier only gets a list of items you expect them to price. You can either set the Print Area not to include the Cost and Total columns, or change the fonts to match the background (white-on-white or blue-on-blue) so they can't be seen.