Rapid Estimator
Home Edition

Step By Step To Creating An Estimate

This tutorial will cover the bare basic step by step instructions to starting and finishing an estimate. This tutorial acts as a reminder of what to do next. NOTE: This tutorial does not explain in full how to use any single area of the program. For more information on how to use any part of the program please see the tutorials on that topic.

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'
- Fill in the customers information in the middle column. NOTE: All areas from ‘Name to Zip code’ excluding ‘Company, must be filled out completely. This will prevent the program from popping up incomplete errors
- If the job site address is the same as the address you entered in the middle column, mark the box ‘Use Customer Information’ located in the third column If the job site is not the same, fill out the job site address in column three.
- Verify your markups are correct. Markups are located at the bottom of column three. For more information on using markups please see tutorial on ‘Using Markups’
- Once you are finished with the customer information, click ‘Save’ to exit.
- You will be prompted with the option to create a cover page. For more information on setting up the cover page please see tutorial.

Step Two: Phases

- Step two is entering your phases. A phase is usually a part or an area of your project, mostly a room (kitchen, bath, etc.…). You can create as many phases as your project needs. Use the pre-made phase titles by clicking on one and choosing ‘Add Phase to Estimate’.
- Rapid Home gives you the option to enter the base dimensions for each phase and the program will calculate quantities for you. Or you can choose to manually enter in the quantities at during the creation of an estimate. For more help on creating and using Phases, please see tutorial.

Step Three: Adding Cost Items

- To add cost items to an estimate, click on the ‘Cost Books’ tab.

- Choose a cost book to view the item contents. NOTE: All four books can be used in a single estimate.
- Choose the items to transfer to your estimate by checking the tag box and selecting ‘Transfer to Estimate’.
- For more information on using the ‘Cost Books’ please see tutorial

Step Four: Adding a Contract

- To add a contract to an estimate, with the estimate open, click the ‘Contracts’ tab.
- Choose a contract from the left column
- Click ‘Show Preview’
- Select ‘Save Contract’ NOTE: After saving a contract, it must show in the bottom of the left column for it to be attached to the opened estimate.
- For more information on creating, editing and using contracts, please see tutorial

Step Five: Reports

- To convert an estimate into Report format, click on the ‘Reports’ tab
- Choose a report using the first four drop-down options.
- Once a report is chosen, it will pop up for preview.
- If the report is not the one you want, simply ‘Close Report’ and choose another one.
- Once you have chosen the report you want, you can ‘Save as PDF’, or you can ‘Upload and Email’ to your client.
- For more information on using reports, please see tutorial.

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