

# Instructions for Using the Controls Estimating Form

The screenshot shows an Excel spreadsheet titled "Microsoft Excel - EST\_FORM\_SAMPLE". The active sheet is "Controls Estimate Summary Sheet" for "Caseright Industries".

**Job Information:**

- Job Name: Caseright Industries
- Job Number: 12512345
- Salesman: B. Urlacher
- Date of Estimate: January 7, 2002

**Labor Rates (per hour):**

- Electrical: \$56.00
- Commissioning: \$56.00
- Engineering: \$50.00

**Sheet Totals Table:**

Sheet Totals	% of Job	Elec. Labor Hours	Elec. Labor Cost	Comm Hours	Comm Cost	Eng Hours	Eng Cost	Adjusted Material Cost	Total
VAV Air Handler									
VAV & FP Boxes									
<b>Totals</b>									
Electrical Labor Hours:		0.0							

The bottom of the screenshot shows the worksheet tab bar with tabs for "Summary", "VAV AHU", "VAVs & FPs", "Estimate3", "Estimate4", "Estimate5", and "Estimate6".

- 1) Open up the form using Excel. The form opens to the Summary Sheet.
- 2) Fill out the top fields (job name, job number, salesman initials, and date).
- 3) At the top and to the right, revise the labor rates as desired.
- 4) There are (7) estimating worksheets behind the summary sheet. Go to the first sheet.
- 5) The job name, job number, and date automatically appear at the top of this sheet, and on all subsequent sheets.
- 6) On the first sheet, fill in the field for Subject.
- 7) Fill in line items, labor hours, material costs, and commissioning and engineering hours as required.
- 8) For any fields requiring a "zero" (for labor hours, material cost, commissioning hours, engineering hours), type in 0, or simply leave the field blank.
- 9) At the bottom, write any notes that apply. Include note number in the appropriate column, for the line item that the note refers to.
- 10) Back at the Summary Sheet, the tallies for the estimate appear, as well as the sheet Subject.
- 11) If the project can be broken down into multiple subjects, then use the additional estimating worksheets in the same manner as the first sheet.
- 12) If desired, the name of the worksheet tabs can be changed to match the subjects. Right click on the tab and select "Rename".