Estimation (BOQ Builder): Build and Price the Estimate

Module: Preconstruction → Estimation
For: Estimator / Preconstruction Lead
Version: 1.0 | Last updated: 24 July 2026 | Next review: 24 January 2027
Related SOPs: Quantity Takeoffs, Tender Tracker, Tender Register, Subcontractor Tendering, Budget Register (Commercial).

Objective

Build and manage a project's bill of quantities (BOQ) and priced estimate across versions, so the tender value and margin flow live into the Tender Tracker and, once awarded, into the Commercial budget.

Before you begin

You will need:

- Access to the **Preconstruction** module for the workspace.
- The project selected in the workspace switcher at the top of the screen. Estimation is project-scoped; each project has its own BOQ versions.
- Quantities in the **Quantity Takeoffs** module if you want to pull them in automatically. You can also add items manually or import a spreadsheet.

> **Replaces today:** Buildsoft and Costex estimates in standalone files, cost plans in Excel, and margin worked out on a calculator. Estimation keeps the BOQ, the pricing and the margin in one place, versioned.

Things to consider

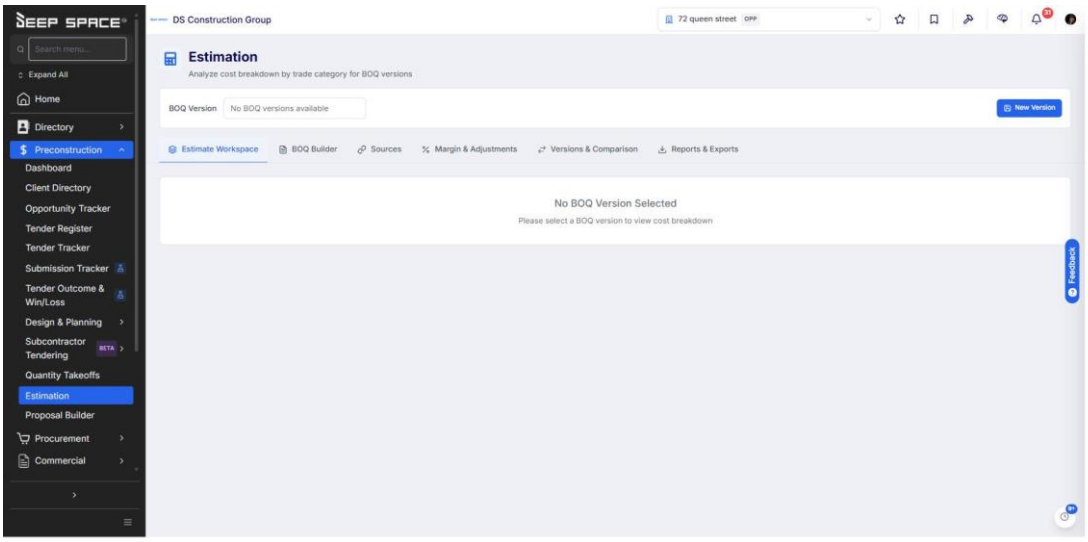
Cost and sell are different. **COST TOTAL** is the hard cost of the works; **SELL TOTAL** is what the client pays. The gap between them is your margin. Global markups (preliminaries, overheads, profit, contingency) are set on the **Margin & Adjustments** tab.

Versions are how you keep options and history. Each **BOQ version** is a self-contained estimate; the version marked **Current** is the one that feeds the linked tender. Revise in a new version rather than overwriting.

Steps

Select or create a BOQ version

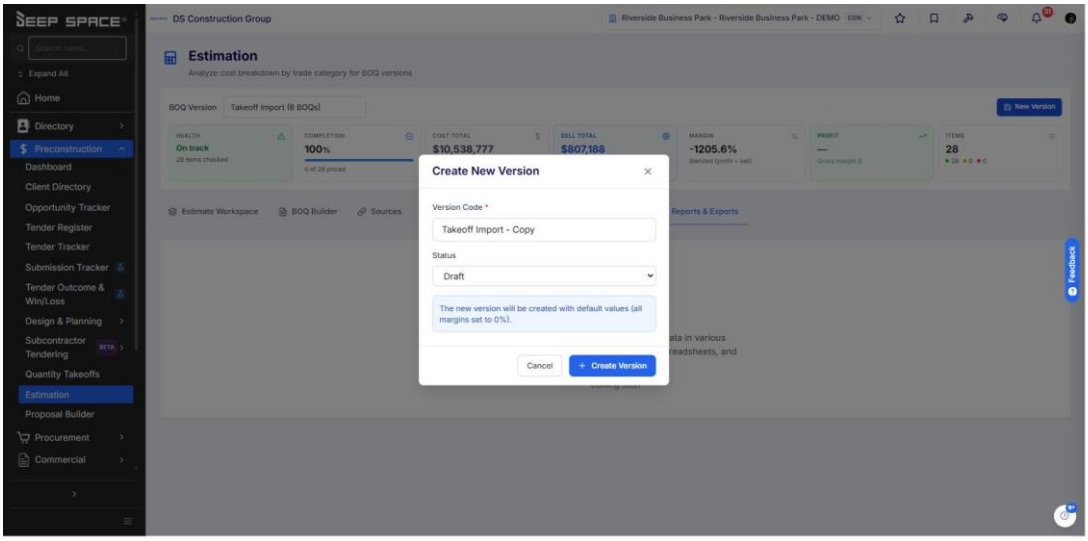
1. Open **Preconstruction → Estimation** from the left-hand menu. Estimation opens on the **Estimate Workspace** tab for the selected project.



The Estimation module before a version is chosen. Six tabs run across the top; the BOQ version selector sits top left.

> **Note:** Estimation is project-scoped. Use the project switcher at the top of the screen to choose the project you are estimating. If the project has no estimate yet, you see "No BOQ versions available".

2. Pick an existing estimate from the **BOQ Version** dropdown, or click **New Version** to start one.

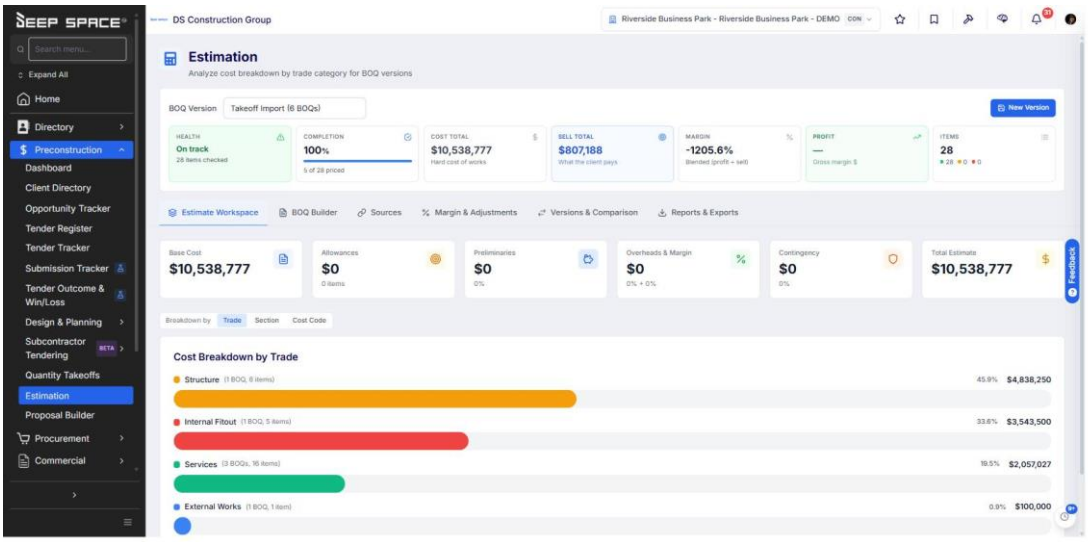


Create New Version: name the version, set its status, and create it.

3. In **Create New Version**, enter a **Version Code**, set the **Status** (for example **Draft**), and click **Create Version**. The version is created with default values (all margins set to 0%).

Read the Estimate Workspace

4. With a version selected, the **Estimate Workspace** shows the headline cards: **Health**, **Completion** (how many items are priced), **Cost Total**, **Sell Total**, **Margin**, **Profit** and **Items**.

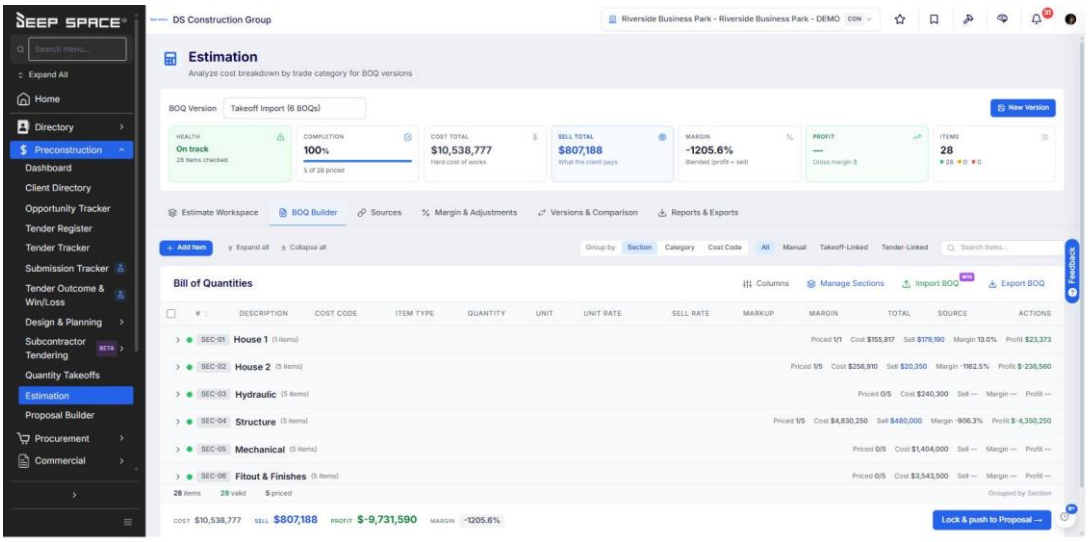


Estimate Workspace: headline KPIs, the estimate build-up, and the cost breakdown chart.

5. Below the KPIs, the estimate cards break the number down: **Base Cost**, **Allowances**, **Preliminaries**, **Overheads & Margin**, **Contingency** and **Total Estimate**.
6. Use the **Breakdown by** toggle (**Trade**, **Section**, **Cost Code**) to change how the **Cost Breakdown** chart groups the estimate, so you can see where the cost is concentrated.

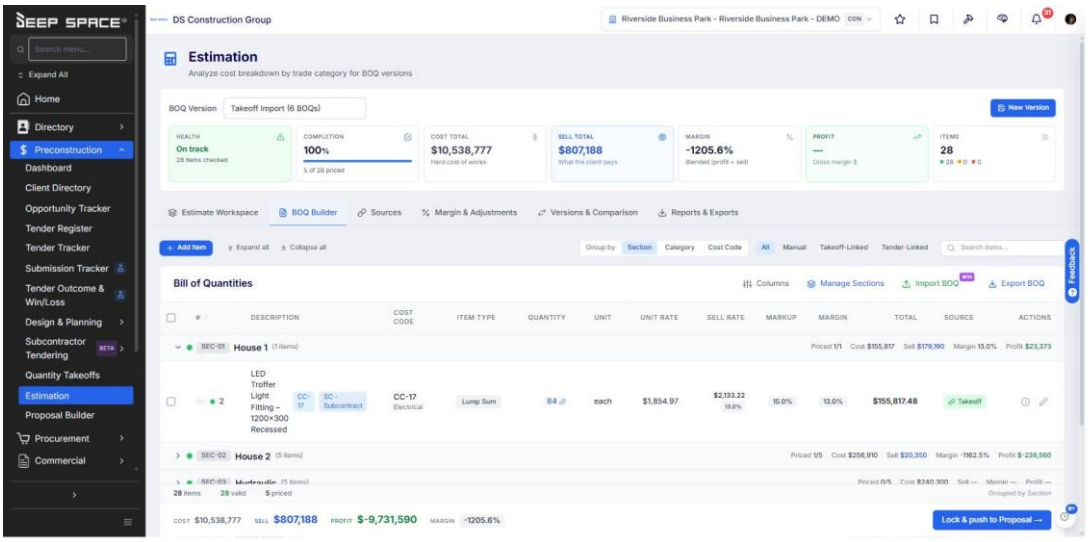
Build the bill of quantities

7. Open the **BOQ Builder** tab. This is the bill of quantities: one row per item, grouped into sections.



The BOQ Builder: sections down the page, with priced counts, cost, sell, margin and profit on each section header.

8. Use **Group by** (**Section**, **Category**, **Cost Code**) to organise the list, and the **All / Manual / Takeoff-Linked / Tender-Linked** filter to focus on a subset. **Search items** narrows the list as you type.
9. Expand a section to read the line columns: **#**, **Description**, **Cost Code**, **Item Type**, **Quantity**, **Unit**, **Unit Rate**, **Sell Rate**, **Markup**, **Margin**, **Total**, **Source** and **Actions**.



A BOQ line. The Source tag shows where the line came from (here, Takeoff); the pencil in Actions opens it for editing.

10. Add lines with **+ Add Item**, bring lines in from a spreadsheet with **Import BOQ**, or send the bill out with **Export BOQ**. **Manage Sections** adds and renames sections; **Columns** shows or hides columns.

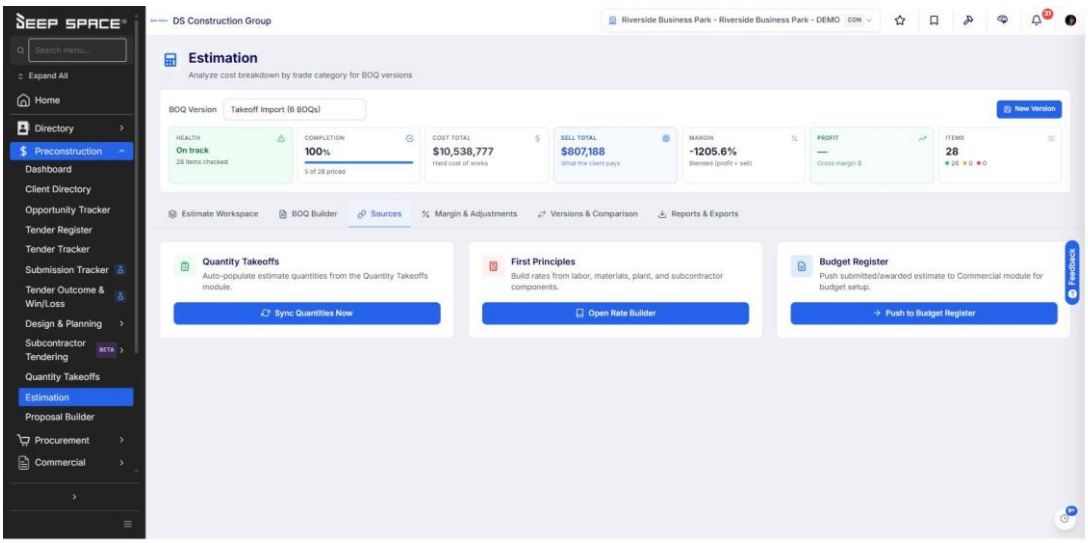
11. Edit a line with the pencil in **Actions**. Set the **Quantity**, **Unit Rate** and **Markup**; the **Sell Rate**, **Margin** and **Total** calculate as you type.

> **Note:** The **Cost Code** on each line ties the estimate to the workspace cost structure, so the estimate lands in the right budget line when it is pushed to Commercial.

12. The footer totals the whole bill (**Cost**, **Sell**, **Profit**, **Margin**). When the estimate is ready, click **Lock & push to Proposal** to take it forward.

Connect the sources

13. Open the **Sources** tab. Three cards connect the estimate to the rest of the platform.

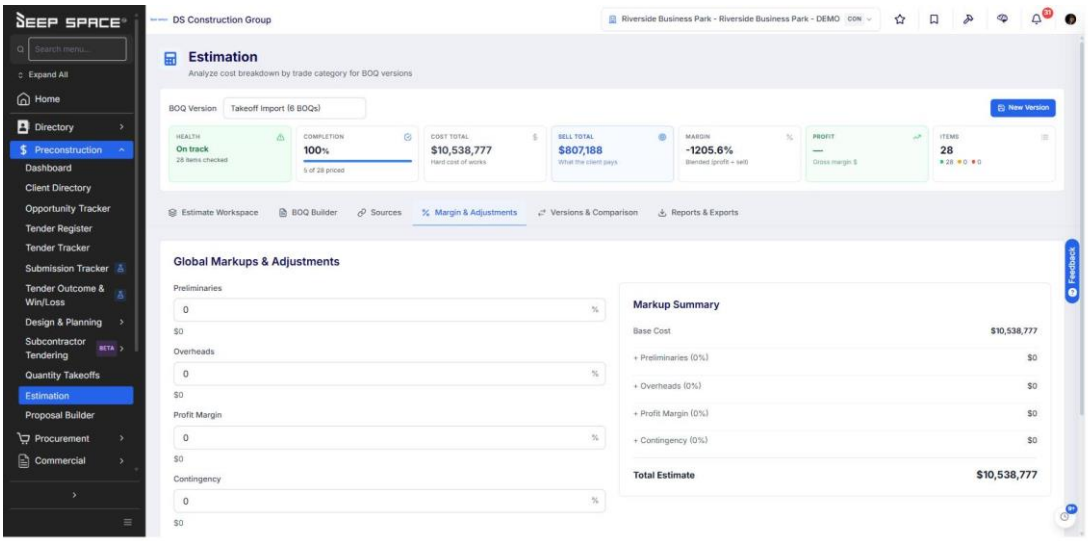


Sources: pull quantities from Takeoffs, build rates from first principles, and push the estimate to the Budget Register.

14. Use **Sync Quantities Now** (**Quantity Takeoffs**) to auto-populate quantities from the Quantity Takeoffs module; **Open Rate Builder** (**First Principles**) to build rates from labour, materials, plant and subcontractor components; and **Push to Budget Register** to send the submitted or awarded estimate to the Commercial module for budget setup.

Set the margins

15. Open the **Margin & Adjustments** tab. Set the global **Preliminaries**, **Overheads**, **Profit Margin** and **Contingency** percentages.



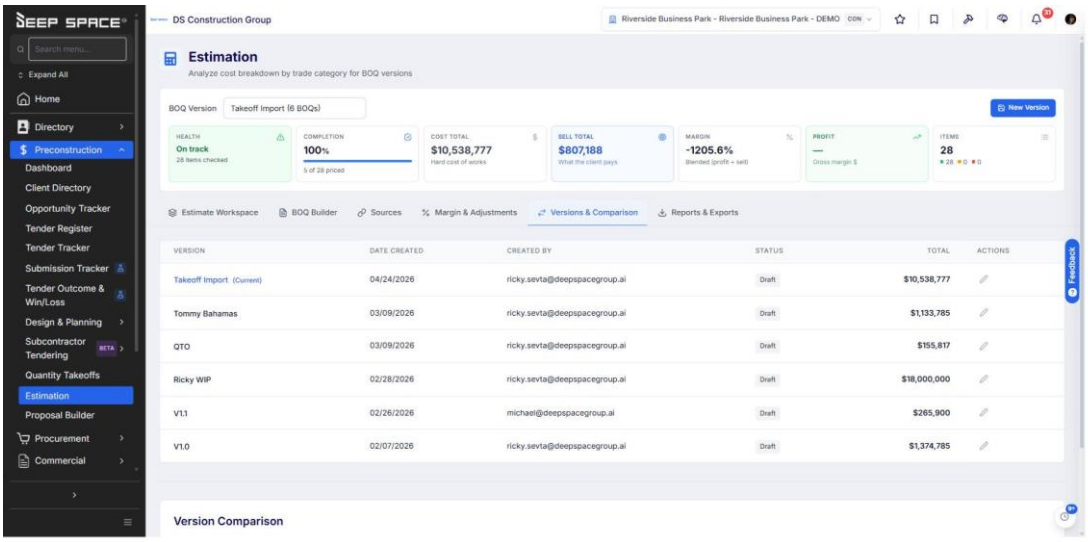
Margin & Adjustments: global markups on the left, a live Markup Summary on the right.

16. The **Markup Summary** on the right shows each layer added on top of the **Base Cost**, ending in the **Total Estimate**.

> **Note:** These are global markups for the whole version. Per-line markups are set on the **BOQ Builder** tab.

Manage versions and export

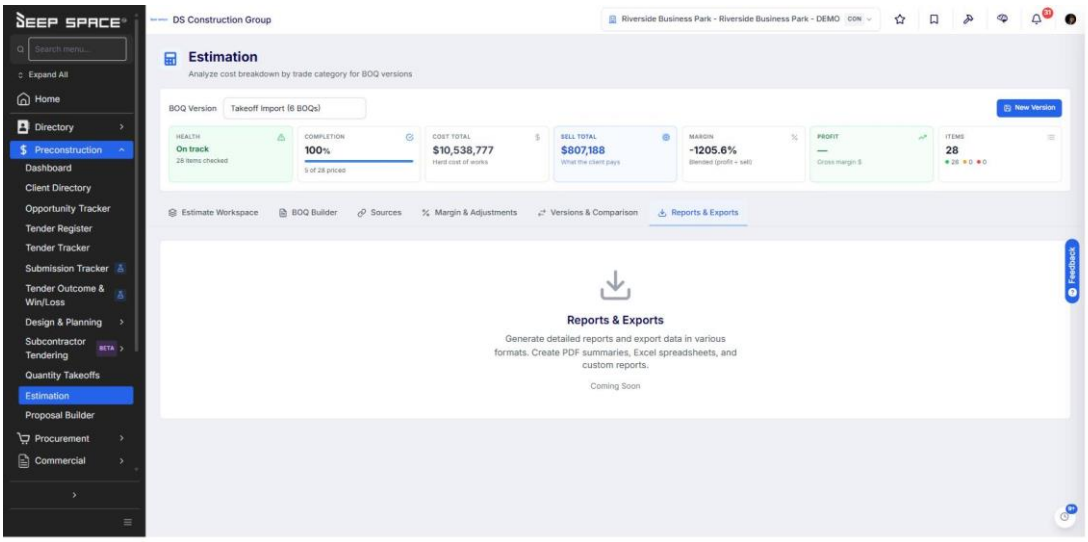
17. Open the **Versions & Comparison** tab. Every BOQ version is listed with its **Version** code, **Date Created**, **Created By**, **Status** and **Total**. The version marked **Current** is the one that feeds the tender.



Versions & Comparison: the full version history, plus a side-by-side comparison below.

18. Use **Version Comparison** (below the list) to compare two versions side by side before you decide which to submit.

19. The **Reports & Exports** tab (PDF summaries, Excel spreadsheets and custom reports) is marked **Coming Soon**. For now, use **Export BOQ** on the BOQ Builder tab to get the bill out.



Reports & Exports: coming soon. Export the bill from the BOQ Builder in the meantime.

What happens next

- The version's **Total Estimate** and margin feed the linked tender's **Estimate & Margin** tab in the **Tender Tracker**, so the tender value always matches the current estimate.
- **Push to Budget Register** carries the awarded estimate into the **Commercial** module as the project budget.
- Each version keeps its own history, so you can revise without losing earlier numbers.

Related SOPs

- **Quantity Takeoffs:** measure quantities that feed the BOQ via Sync Quantities.
- **Tender Tracker:** where the estimate value and margin appear against the live bid.
- **Subcontractor Tendering:** price trade packages that inform the estimate.
- **Budget Register (Commercial):** where the awarded estimate becomes the project budget.

Document control
Version 1.0 | Authored: 24 July 2026 | Next review: 24 January 2027
Walked by: live product walkthrough (DS Construction Group workspace) | Captured by: Claude