Showing Estimate Line Items on Budget

Surface your estimate's line-level detail on the Budget Register — without moving a single dollar — using reusable Level-2 cost codes

Deep Space Horizon · Estimation · Commercial · September 2026

1. What this does

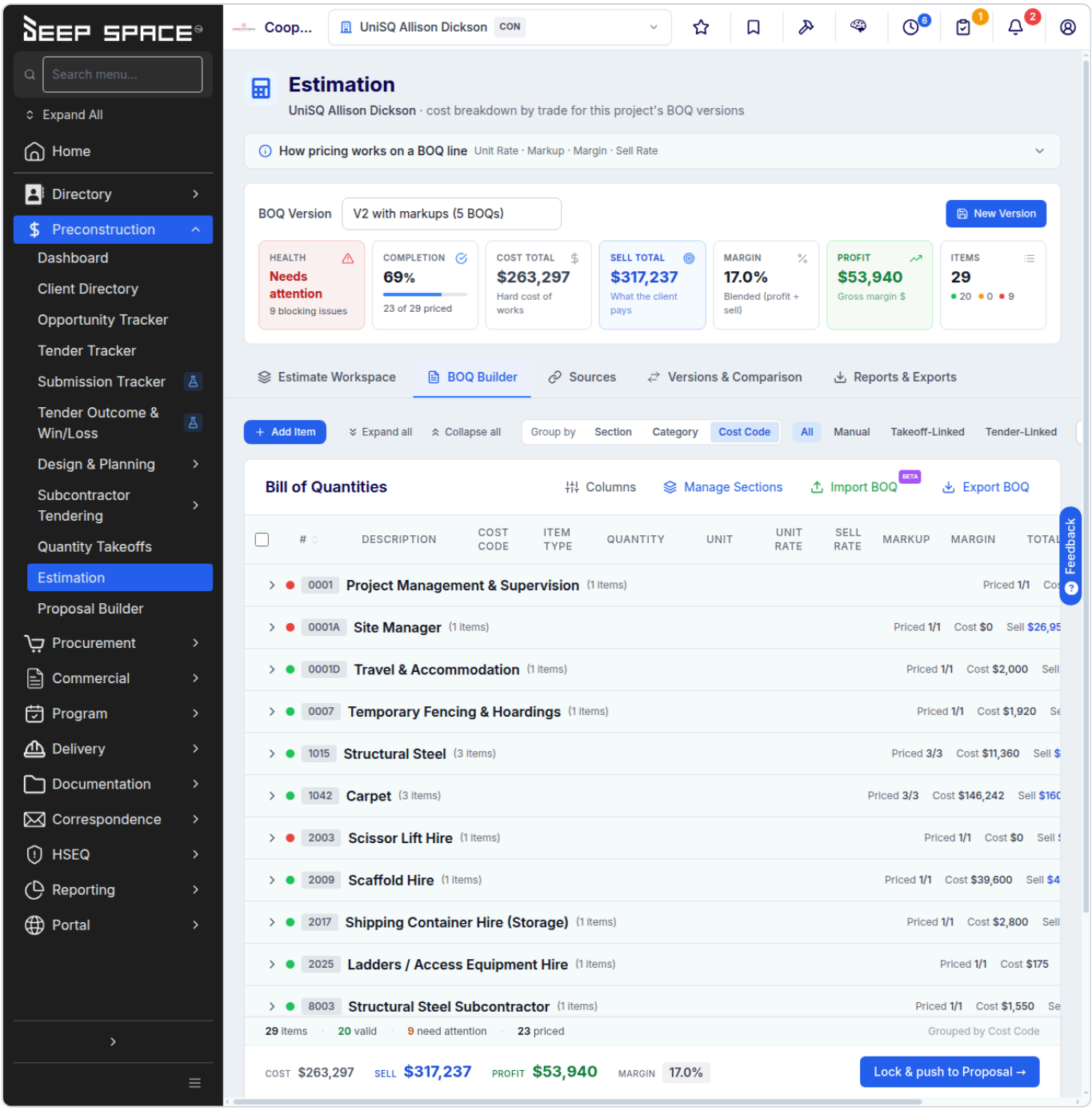
In **Preconstruction → Estimation → BOQ Builder** every line is priced individually — "Chair Removal", "Chair Reinstall", "Dry Clean Chairs" — but each line is *coded* to a cost code. When the estimate is pulled through to the **Budget Register**, the register shows one row per **cost code**, not one row per estimate line. If several lines share a code, they collapse into a single budget row: a $44,300 "Carpentry & Framing Subcontractor" row can quietly contain five very different scopes of work, and every downstream workflow — raising POs and subcontracts, reconciling invoices, forecasting — sees only the lump.

This guide shows the supported pattern for keeping that detail: add **reusable Level-2 cost codes** to your workspace Financial Model and map the estimate lines to them. It is a re-labelling one level deeper — quantities, rates, markups and sell prices are untouched, so estimate and budget totals do not change.

> **The rule to remember:** the Budget Register shows exactly one row per cost code that estimate lines are mapped to. If you want to see a line on Budget, give that line its own cost code.

2. Find the lines that are collapsing

Open **Preconstruction → Estimation → BOQ Builder**, pick your **BOQ Version**, and switch *Group by* to **Cost Code**. Any code carrying two or more priced lines is a candidate — those lines are invisible as individual rows on Budget today.



BOQ Builder with *Group by · Cost Code*. Codes like **1015 Structural Steel (3 items)** and **1042 Carpet (3 items)** are each collapsing several scopes into one future budget row.

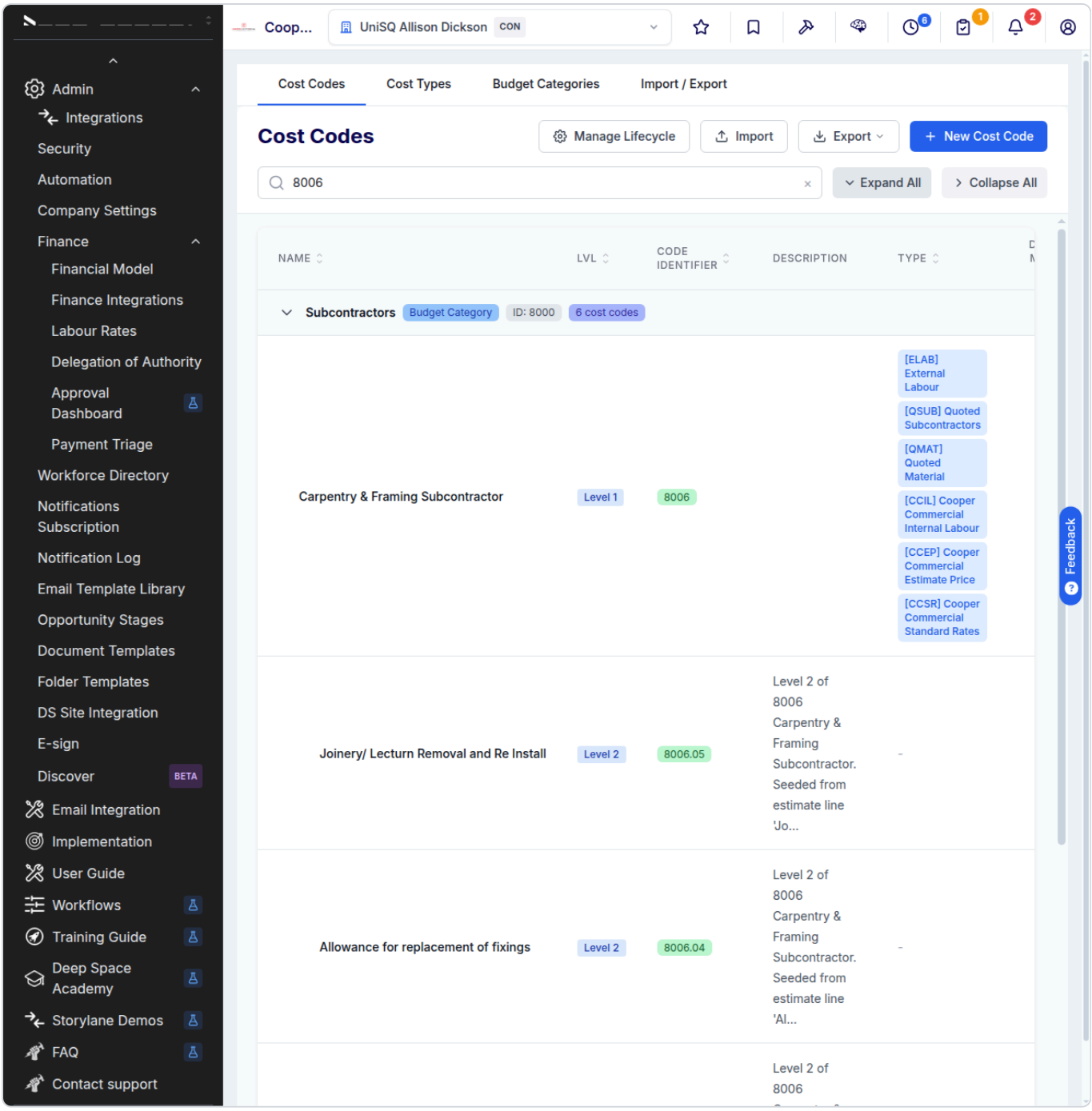
> Codes with a **single** line already match their budget row one-for-one — leave them alone. Only expand where lines are collapsing.

3. Add reusable Level-2 codes to the Financial Model

Cost codes live in your workspace Financial Model: **Admin → Finance → Financial Model** (the **Cost Codes** tab). For each scope you want visible on Budget, click **New Cost Code** and set:

Field	What to enter
Name	The scope of work, phrased for reuse — “Chair Removal”, not “Chair removal for the UniSQ job”.
Parent cost code	The existing Level-1 code the line sits on today (e.g. `8006 Carpentry & Framing Subcontractor`). This is what makes it Level-2.
Code identifier	A child of the parent’s code — the convention used here is `<parent>.01`, `<parent>.02`, … (e.g. `8006.01`).
Budget category	The **same category as the parent** (e.g. 8000 Subcontractors) — this keeps every category total exactly where it is.

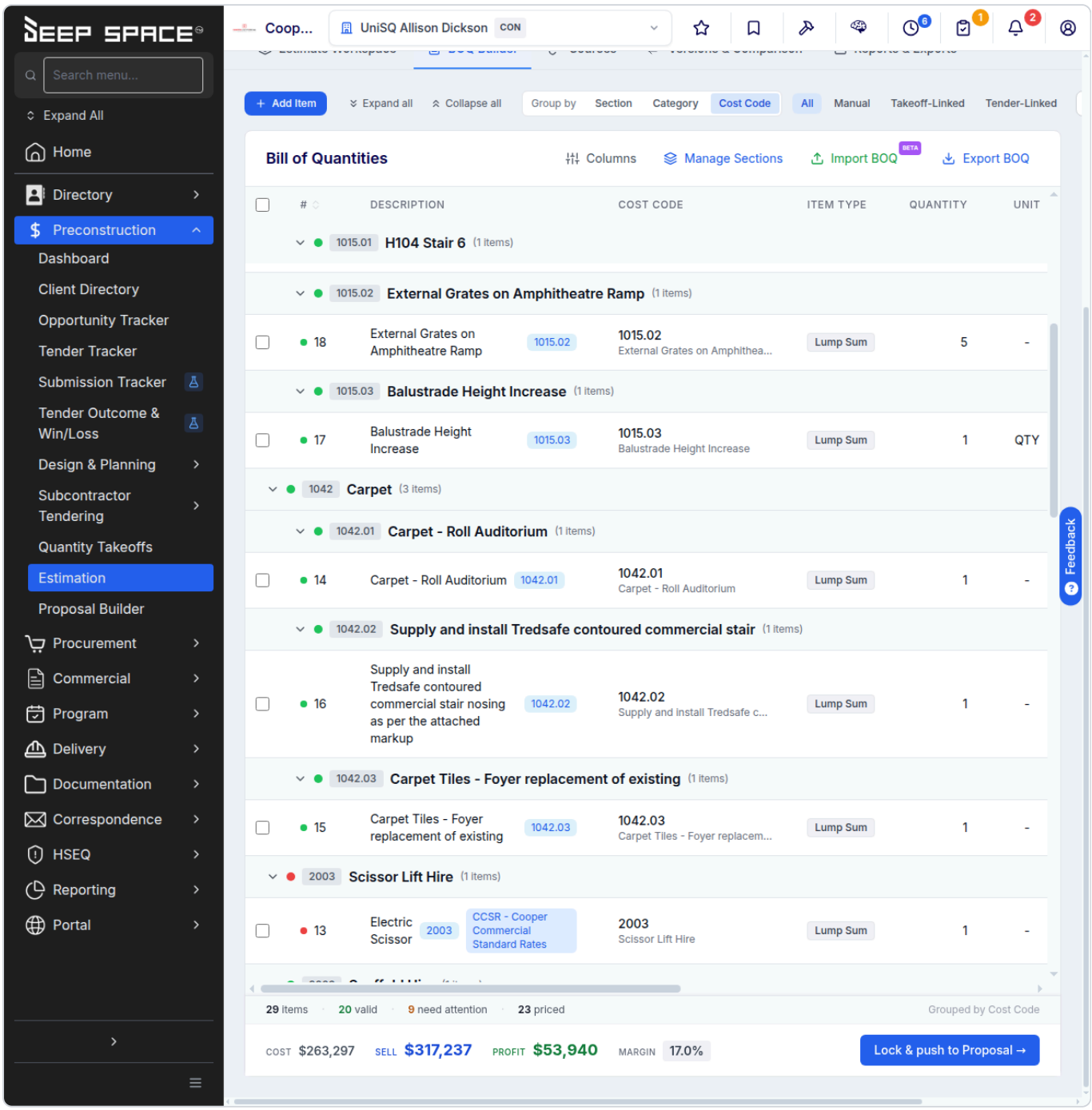
Because the codes are workspace-level, they are **reusable on every future project** — over time your Financial Model becomes a scope library, and cost history accumulates per scope across jobs.



The Financial Model after adding children under **8006**: each new code shows **Level 2** with its `8006.0x` identifier, nested under the **Level 1** parent.

4. Remap the estimate lines

Back in **BOQ Builder**, edit each collapsing line and change its **Cost Code** from the shared Level-1 parent to its new Level-2 child. Change nothing else — no quantity, rate or markup edits. The totals bar at the bottom of the grid should read identically before and after.

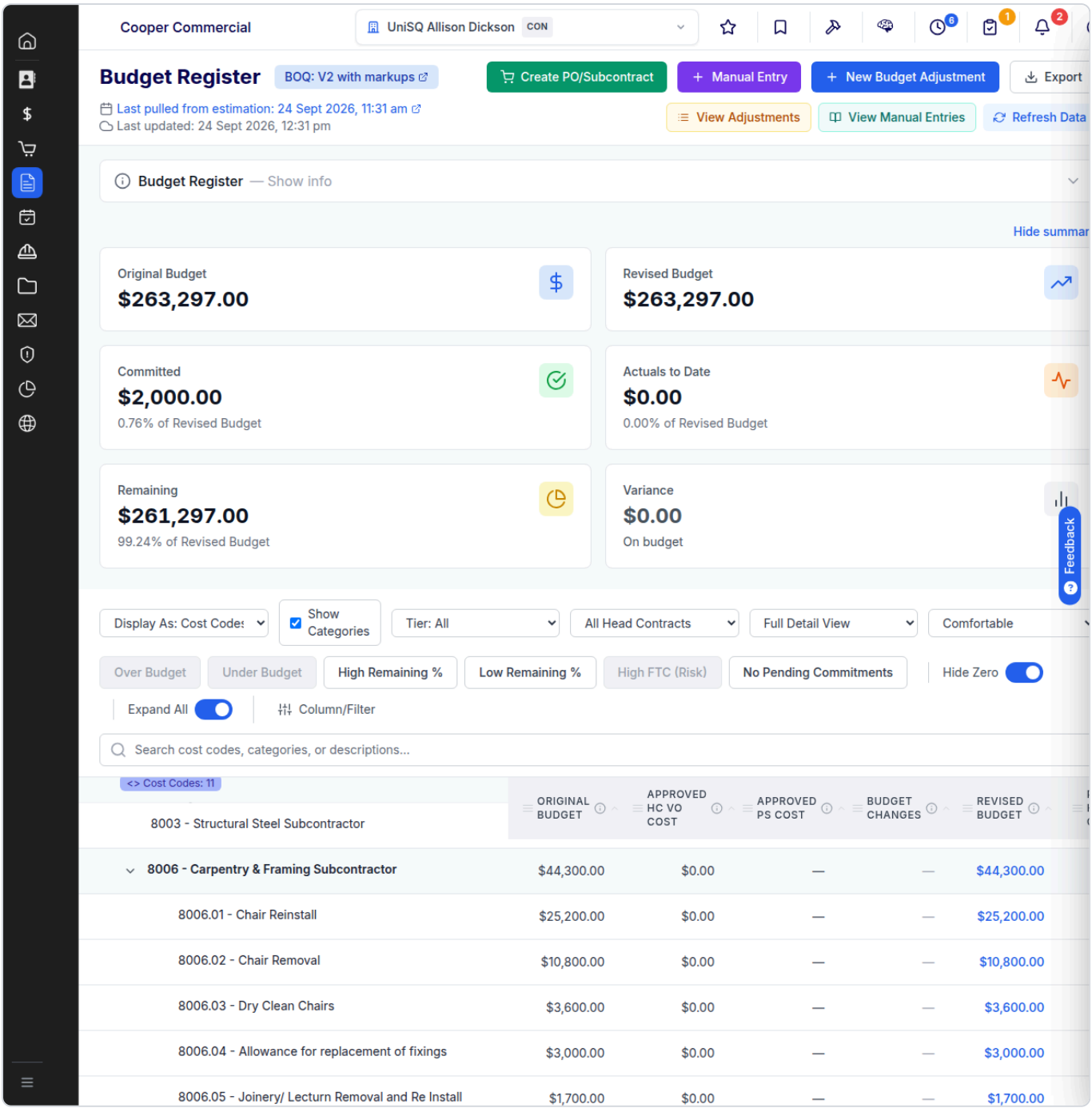


After remapping: each line carries its own Level-2 code (`1015.02` , `1015.03` , `1042.01–.03` …) and the footer still reads **Cost $263,297 · Sell $317,237** — unchanged.

Same lines · same dollars · one code per scope of work

5. Refresh the Budget Register

Open **Commercial → Budget Register** and click **Refresh Data**. Every Level-2 code now appears as its own row, nested under its parent, with its estimate line's value as Original Budget. Use **Expand All** or the **Tier** filter to work at whichever level suits the conversation — parents roll their children up to exactly the old figure.



The Budget Register after the refresh: **8006** still totals $44,300, now broken into `8006.01–.05` — one row per estimate line. The register total, commitments and actuals are untouched.

From here the granularity flows downstream: **Create PO/Subcontract** commits against the specific Level-2 codes (PO line items now correspond to estimate lines), invoice reconciliation and cost reporting inherit the same breakdown, and remaining / committed tracking works scope-by-scope.

6. Worked example — before and after

A real refurbishment estimate: 29 lines, $263,297 cost. Four codes were carrying 13 lines between them, so the register showed four lumps. After adding 13 Level-2 codes and remapping:

Budget row	Scope (from the estimate line)	Original Budget
8006 — Carpentry & Framing Subcontractor	**rolls up its children:**	**$44,300.00**
8006.01	Chair Reinstall	$25,200.00
8006.02	Chair Removal	$10,800.00
8006.03	Dry Clean Chairs	$3,600.00
8006.04	Allowance for replacement of fixings	$3,000.00
8006.05	Joinery / Lecturn Removal and Re-Install	$1,700.00
1042 — Carpet	**rolls up its children:**	**$146,242.00**
1042.01	Carpet — Roll Auditorium	$95,500.00
1042.02	Tredsafe contoured commercial stair nosing	$46,000.00
1042.03	Carpet Tiles — Foyer replacement of existing	$4,742.00
1015 — Structural Steel	**rolls up its children:**	**$11,360.00**
1015.01	H104 Stair 6	$6,825.00
1015.02	External Grates on Amphitheatre Ramp	$3,375.00
1015.03	Balustrade Height Increase	$1,160.00
8009 — Painting Subcontractor	**rolls up its children:**	**$12,650.00**
8009.01	Paint Ceiling to Main Theatre	$12,000.00
8009.02	Paint Ceiling to Bio Box	$650.00

After the change the register total was still **$263,297.00**, every parent rolled up to exactly its previous figure, and the project's existing commitment was untouched. Nothing moved — it just became visible.

7. Good to know

- **Totals never change.** This pattern only re-labels where money sits, one level deeper. If a total moves, a rate or quantity was edited by mistake — check the line before continuing.
- **Stay inside the family.** Always create the Level-2 code under the line's *current* parent, in the parent's budget category. Moving a line to a different Level-1 family is a separate re-coding decision that deserves commercial review.
- **Keep names reusable.** Name codes after the scope of work, not the project — the same code should make sense on next year's job.
- **Unpriced and note lines** ("no allowance for…") have no dollars to show. If they are real scope, price and code them first — they will then appear like any other line.
- **Do it before you commit.** The cleanest time is after estimate sign-off and before the first PO or subcontract, so commitments land on the granular codes from day one. It still works later — existing commitments simply stay on the codes they were raised against.