Quote60

Getting started

From a PDF of the plans to a priced quote,
and knowing whether you made money.

A short guide for builders, remodelers and specialty trades

Contents

1 · The idea in one page

Why this works differently from a spreadsheet

Most estimating goes wrong in the gap between documents. You measure on paper, retype into a spreadsheet, retype again into a quote, and then never compare any of it to what the job actually cost. Every retype is a chance to be wrong, and the comparison that would have taught you something never happens.

Quote60 keeps one set of numbers from the first measurement to the last invoice. Measure a room on the plan and that quantity becomes a line in the estimate. Price the line and it becomes part of the quote. Record the supplier invoice and it lands against the line you priced. Nothing is retyped, so nothing drifts.

The one number that matters
Margin at bid against margin forecast. If you priced the job at 15% and it is now forecasting 11%, you want to know in week three, not at the final reconciliation.

2 · Set up your business once

Everything on this screen goes onto every quote you ever send, so it is worth ten minutes.

- Logo, name, licence and address. These become your letterhead.
- Default markup. Applied to every new line unless you override it.
- Tax rate, and what it applies to. Most states tax materials only — that is the default.

Markup is not margin
An 18% markup leaves a 15.3% margin. Markup is added on top of cost; margin is what is left as a share of the price. Builders lose real money confusing the two — if you need 18% margin, you must mark up 22%.

3 · Measure off the plans

Scale once, then click

1 **Open the plan**
PDF or image. Multi-page sets are fine — each sheet keeps its own scale, because a set routinely mixes 1/4" plans with 1/8" site plans.

2 **Set the scale**
If the sheet states its scale, use the preset — it is exact. Otherwise trace a dimension you can read off the drawing and type the real length.

3 **Fill the rooms**
Click inside a room and the fill stops at the walls, tracing the outline. If it leaks out, the space is not closed on the drawing — trace that one by hand.

4 **Count the openings**
Pick a category and size, then click each one. Every item gets its own colour and numbers from 1, so doors never get muddled with windows.

5 **Find the rest**
Draw a box around one door symbol and it finds every other copy on the sheet, including rotated ones. Check the matches before accepting them.

6 **Send it to costing**
Your rooms, counts and lengths arrive in the estimate as categories and sub-categories, with quantities filled and prices left blank.

Deductions
Use a Void area for stairwells, chimneys and open-to-below. Any void inside another area subtracts from it automatically, so the floor area you price is the floor area you build.

4 · Price it

Structure first, numbers second

A good estimate is mostly structure. Categories nest as deep as the job needs — Framing holds Floor, Walls, Roof and Labor — and markup inherits down the tree. Set 22% on Framing and every line beneath it inherits 22% unless it says otherwise. A blank markup field shows the inherited rate in grey.

Assemblies do the arithmetic

A linear foot of exterior wall is not one item. It is studs, plate, sheathing, wrap, fasteners and the hours to stand it. Build that recipe once, and every job with exterior wall gets it right. Give the assembly a quantity and it expands into priced lines you can still edit.

Review before you send

The review pass checks your estimate against the lines most jobs carry and yours does not — permits, debris removal, insurance, final clean, contingency — and flags a margin below 12% or a labour share that looks too low. They are prompts, not problems. Plenty will not apply.

Contingency
Set it as a line with 0% markup. You are not making money on contingency; you are holding it. Marking it up quietly inflates your price and hides the real number from you.

5 · Send the quote

Show what helps you, hide what does not

Print gives you three starting points and nine switches over them.

Client quote	Scope and price by category. No quantities, no rates, no margin.
Detailed quote	Every line with quantities and rates. Use it when a client wants to see the workings — but understand you are showing your pricing.
Internal cost report	Everything including cost and margin. Never send this one.

The red band is deliberate
Turn on cost or margin and the document prints a band saying it is internal and must not go to the client. Sending a client the sheet with your margin on it is a mistake you make once.

Track where it stands

Mark the job Sent when it goes out, Approved when it comes back. The pipeline totals what is out for an answer and what you have won, and gives you a win rate by value. Follow up on anything sitting in Sent for two weeks — most quotes are lost to silence, not to price.

6 · Track what it actually costs

The part that makes the next estimate better

Your estimate is the budget — nothing to re-enter. Record each supplier invoice, sub claim and timesheet against the category it belongs to, then tell it how far along that trade is. The forecast is simply what you have spent divided by how far along you are.

- Committed is ordered but not yet invoiced. Spent is money that has landed.
- % complete drives the forecast. Without it, the budget stands unless you have already outspent it.
- Variations lift both the contract and the budget once approved. Unapproved ones are flagged, because carrying unpriced change is how good jobs lose money.

The bar on each category shows spend against budget, with a marker at your percent complete. When the fill runs past the marker, that trade is spending faster than it is progressing. That is your early warning, and it is usually visible weeks before the numbers are.

Do this weekly
Fifteen minutes on a Friday. Enter the week's invoices, nudge the percentages, look at the forecast margin. A job that drifts 4% over three months drifts about 0.3% a week — invisible unless you look.

7 · Run the programme

Pro and Master

Build the schedule from the trades already in your estimate — durations scale with each trade's value and each task starts after the one before. Then adjust, because you know the job and the software does not.

- Weekends are skipped automatically. Durations are working days.
- Tasks chain: move one and everything downstream moves with it.
- Anything overdue and unfinished is outlined in red.
- Days, weeks or months view — months for jobs running half a year.

8 · Mistakes worth avoiding

- Pricing from memory. Last year's lumber number is not this year's. Reprice the template before you send.
- Marking up contingency. It inflates the price and hides the real margin from you.
- Skipping the review pass. It takes ten seconds and catches the permit you forgot.
- Doing work before the variation is approved in writing. The single most common way a profitable job turns unprofitable.
- Never entering actual costs. Without them your next estimate is a guess dressed up as a system.

Everything in this guide is in the app already. Open a set of plans from a job you have already built, price it, and compare the result to what it actually cost you. That is the fastest way to find out whether your rates are right.