

ESTICOM

Quickstart Guide

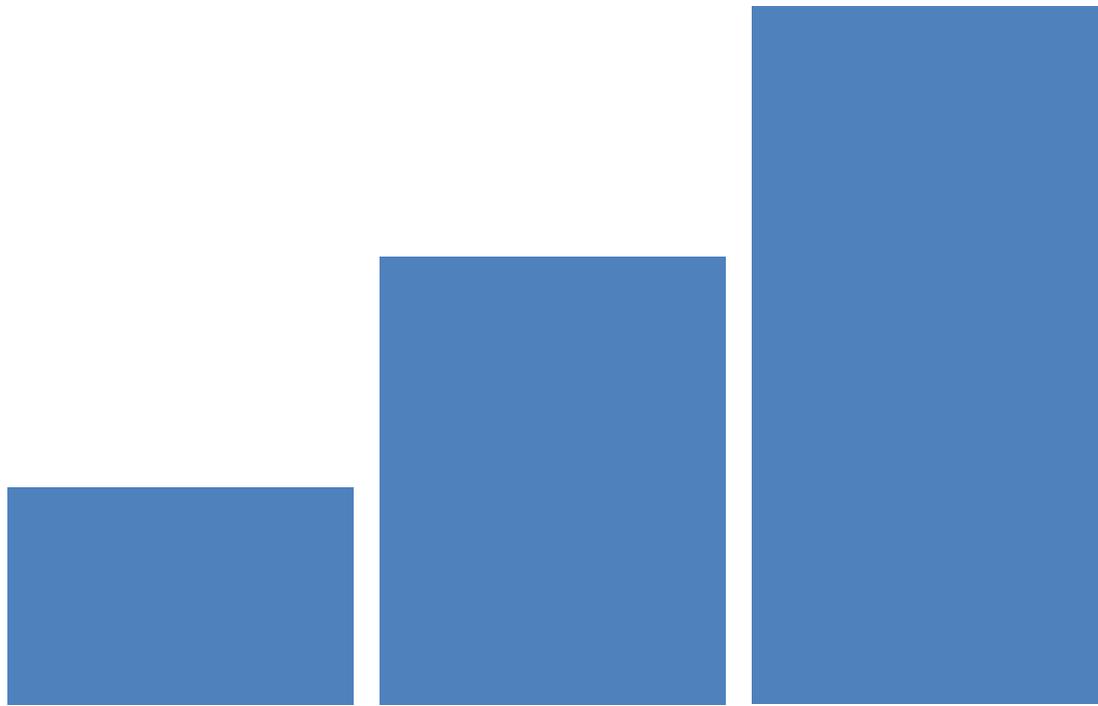


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Introduction

This Quickstart Guide is designed to help new users navigate and use Esticom with ease. The sections of this documentation cover the following:

- Initial Setup
- Software Navigation
- Account Management
- Project Creation
- Take-Off
- Estimates
- Material Catalog

About Esticom

Esticom is a cloud-based Take-Off and Estimating software that was built by contractors for contractors. Our solution caters a wide variety of trades/industries, offering straightforward functionalities paired with advanced features. Esticom's mission is to help you improve office & field productivity, run a leaner organization, and increase profitability whether you're a one-man shop or a multi-disciplined company with multiple locations.

Initial Setup

Esticom's initial setup process starts from account creation, signing in, updating an account, building your team, and understanding the interface. With these steps, you should be good to go and create takeoffs and submit bid estimates to your clients.

The Initial Setup phase is consists of the following:

- [Sign Up/Sign In](#)
- [Updating Profile](#)
- [Building your Team](#)

Sign Up/Sign In

New users can create a free trial account and access Esticom's intuitive and straightforward application. If you already have an account, log in and start creating takeoffs!

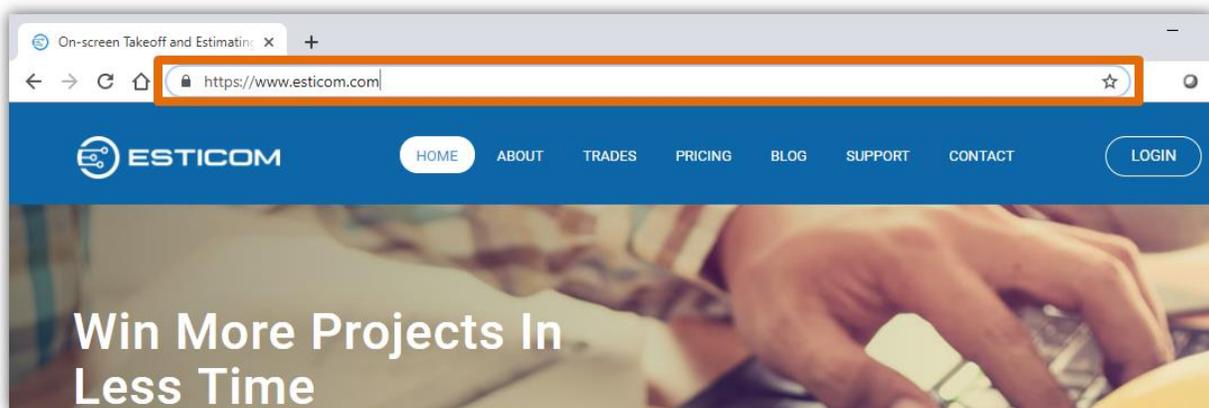
Click the links below to jump to the appropriate topic:

- [Sign Up](#)
- [Sign In](#)

Sign Up

Creating an Esticom account is easy and quick, you only need to enter your work email and add a few details.

1. Open a browser and enter <http://www.esticom.com> in the **Address Bar**.

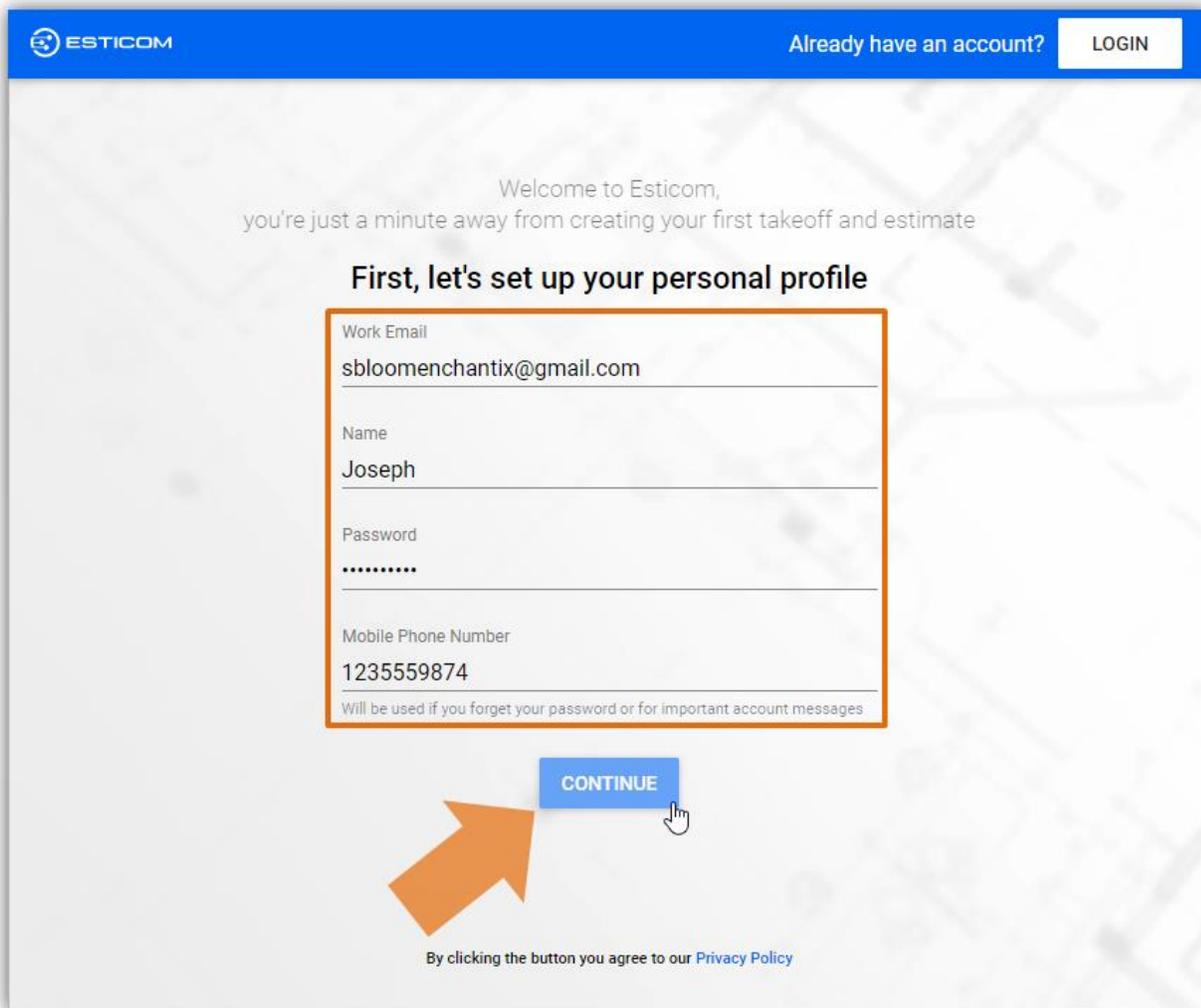


2. In the **Esticom Home** page, find the **Work Email** field and enter the **Email Address** that you want to use to sign up.



3. Click **TRY IT FREE** to proceed.
 - a. You will be directed to the **Personal Profile** page.

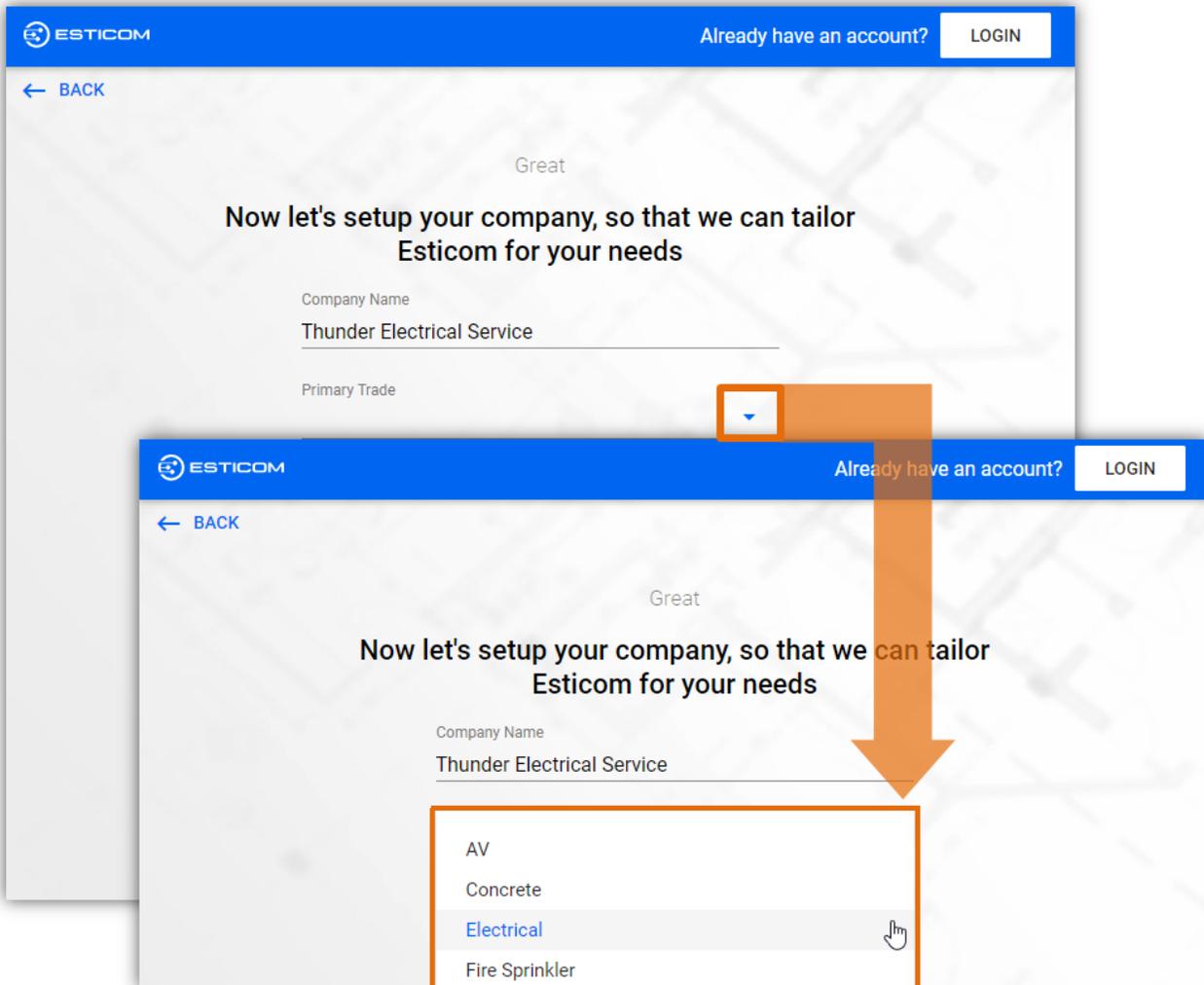
4. By default, the **Work Email** you provided will appear in the **Work Email** field. Specify the following details to proceed:



Field	Instructions
Name	Enter your first and last name.
Password	Enter your password; this will be used when you login to your Esticom account.
Mobile Phone Number	Enter your mobile phone number. This will be used in case you forgot your password or notifications for important account messages.

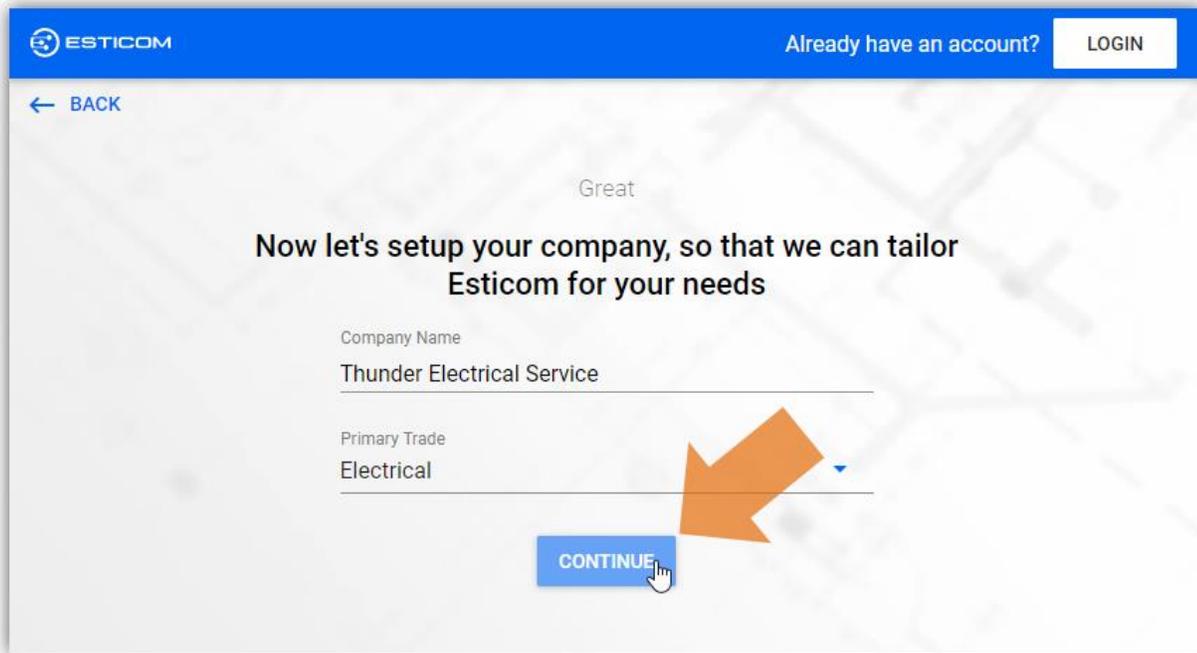
5. After specifying the **Personal Profile**, click **CONTINUE**.
 - a. You will be directed to the **Company Profile** page.

6. In the **Company Profile** page, specify the following information:



Field	Instructions
Company Name	Enter your company's name.
Primary Trade	Click the drop-down arrow and select your company's primary trade: <ul style="list-style-type: none"> • AV • Concrete • Electrical • Fire Sprinkler • Flooring • GC • HVAC • Painting • Plumbing • Roofing • Security and Fire Alarm • Structured Cabling

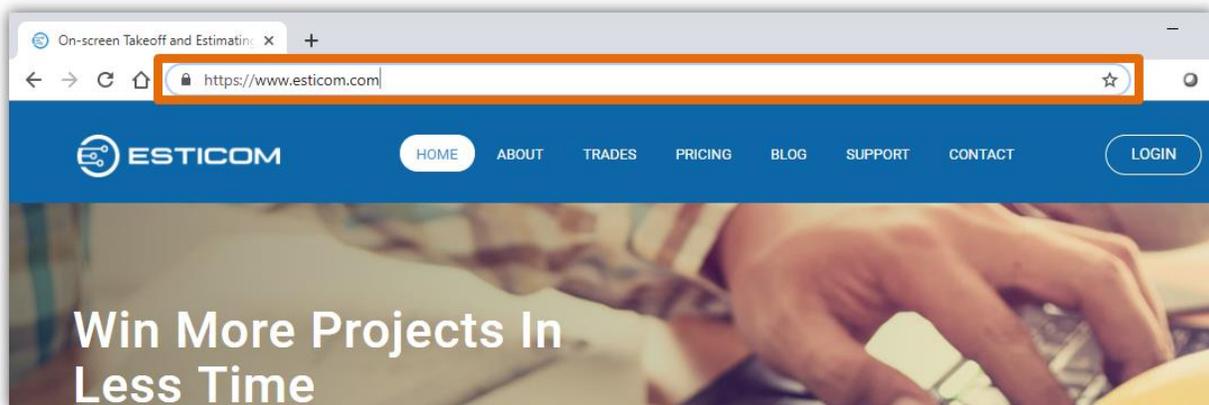
7. After specifying the **Company Profile**, click **CONTINUE**.
 - a. You will be directed to the **Projects Dashboard** page.



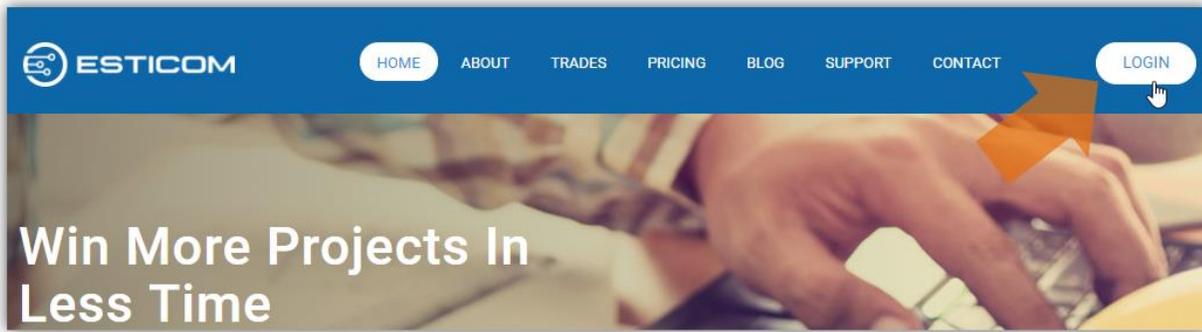
Sign In

Existing users can sign-in on the home page to access the app. Just use the work email address that you used during the initial registration along with your password to access your Esticom account.

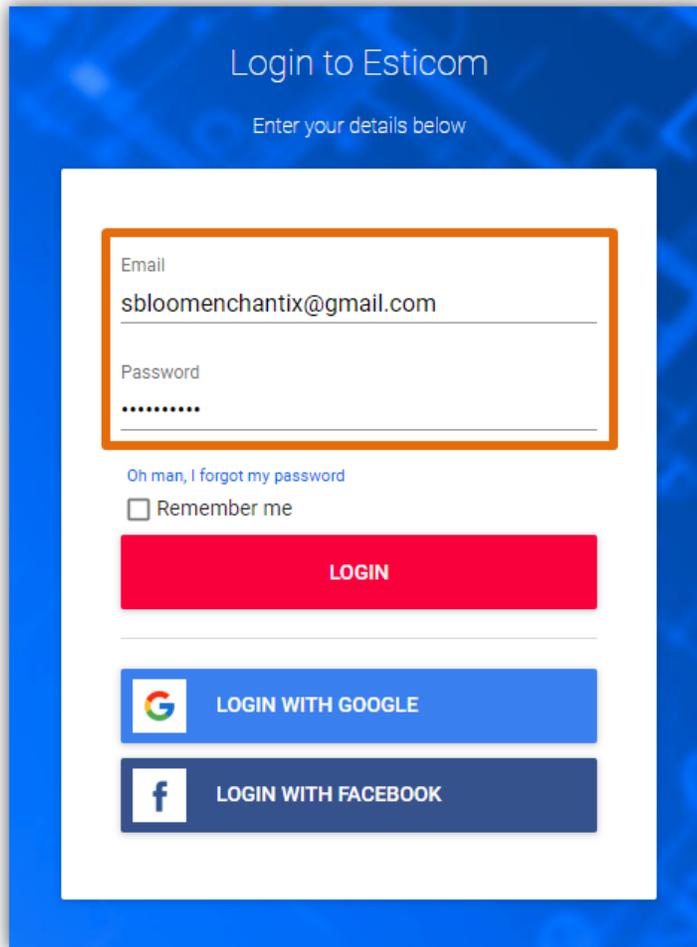
1. Open a browser and enter <http://www.esticom.com> in the **Address Bar**.



2. In the **Esticom** main page, click **LOGIN**.
 - a. You will be directed to the **Login to Esticom** page.



3. Enter your login credentials to begin:



Field	Instructions
Email	Enter the email address you used to register with Esticom.
Password	Enter your password to continue logging in.

- a. **Note:** you can also use the **LOGIN WITH GOOGLE** and the **LOGIN WITH FACEBOOK** buttons to sign in using your existing **Google** or **Facebook** accounts
4. After entering your login credentials, click **LOGIN**.
 - a. You will be directed to the **Projects Dashboard** page.

Login to Esticom

Enter your details below

Email
sbloomenchantix@gmail.com

Password
.....

[Oh man, I forgot my password](#)

Remember me

LOGIN

LOGIN WITH GOOGLE

LOGIN WITH FACEBOOK

Updating Profile

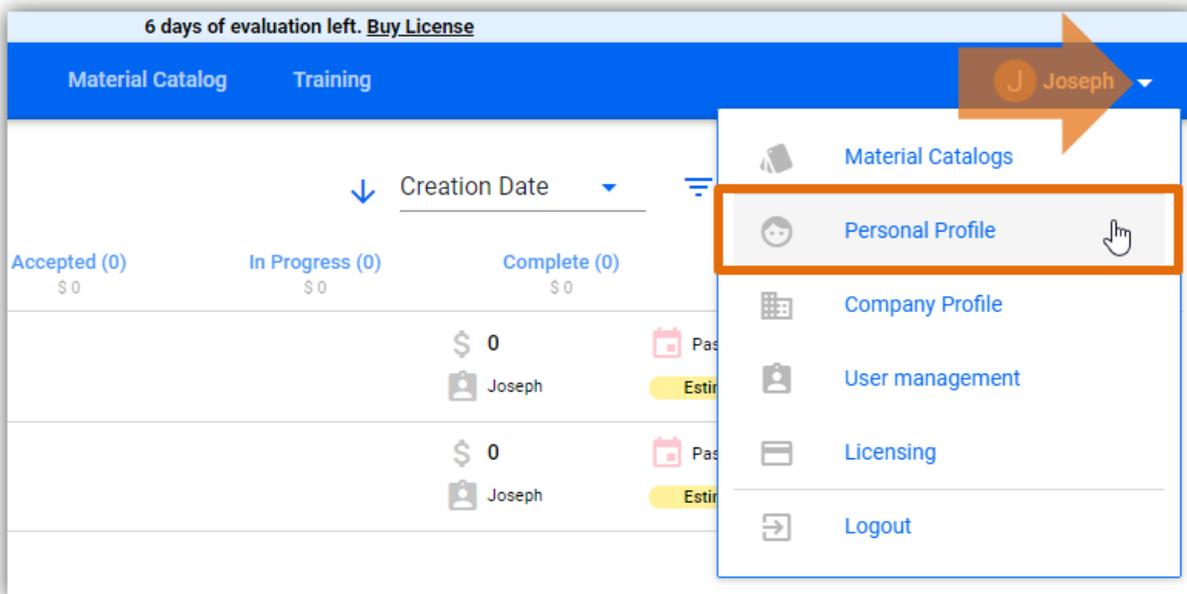
After signing in to a new account, you may need to update your personal and company profile. Setting up your profile lets you manage personal details such as your profile picture (avatar), email address, enabling the Training widget, and/or changing the account password.

In addition, you can manage your company's profile and setting up margins, enabling defaults, adding custom material properties and integration portal. Updating your company profile can also be done using the Menu drop-down and selecting the Company Profile option.

If this is your first time signing in to your account, you can personalize it and enter your contact details. Esticom will send out notifications to the indicated email and/or phone number when one of your projects is due.

The Personal Profile option also enables you to update your password using the Change Password link. The example below will guide you on how to update your personal profile.

1. Click the **Menu** and select **Personal Profile**.
 - a. The **Your personal profile** dialog box will appear.



2. In this dialog box, you can update the following details:

Your personal profile

Your avatar

J

Details

Name
Joseph

Email
sbloomenchantix@gmail.com

Mobile Phone Number
1235559874

Tutorial Widget Visible

[Change Password](#)

CANCEL SAVE

Field	Instructions
Name	Change/update your first and last name if necessary.
Mobile Phone Number	Enter/update your mobile phone number. This will be used in case you forgot your password or notifications for important account messages.
Tutorial Widget Visible	Select the Checkbox to enable the Tutorial Widget. Deselect the Checkbox to hide the Tutorial Widget.

- a. **Note:** you can change your Esticom’s account password by clicking the **Change Password** link.
3. After specifying the **Personal Profile**, click **SAVE**.

After updating your personal profile, you can customize your company profile to update the company branding (logo), location, contact details, and account’s preferred settings.

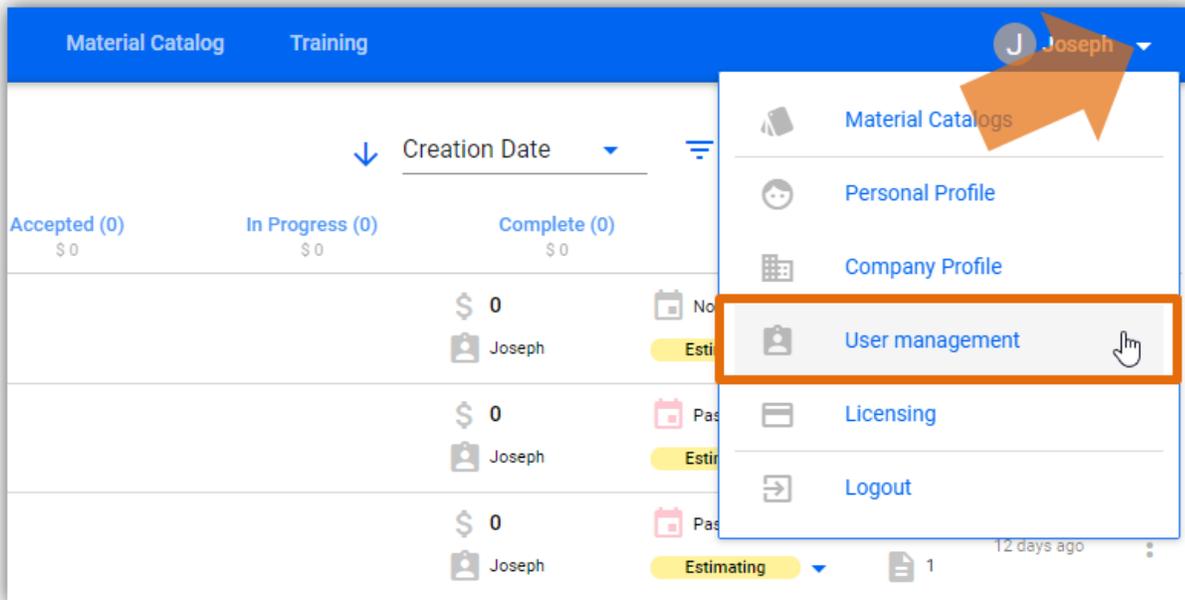
The configured settings under the Company Profile option will be applied to all projects. These settings include the following:

- Minimum Margin Configuration
- Enabling Metric Units as default for new projects
- Enabling Unit Cost pricing for labor
- Adding custom material properties
- Integration Portal for ComputerEase and TigerPaw

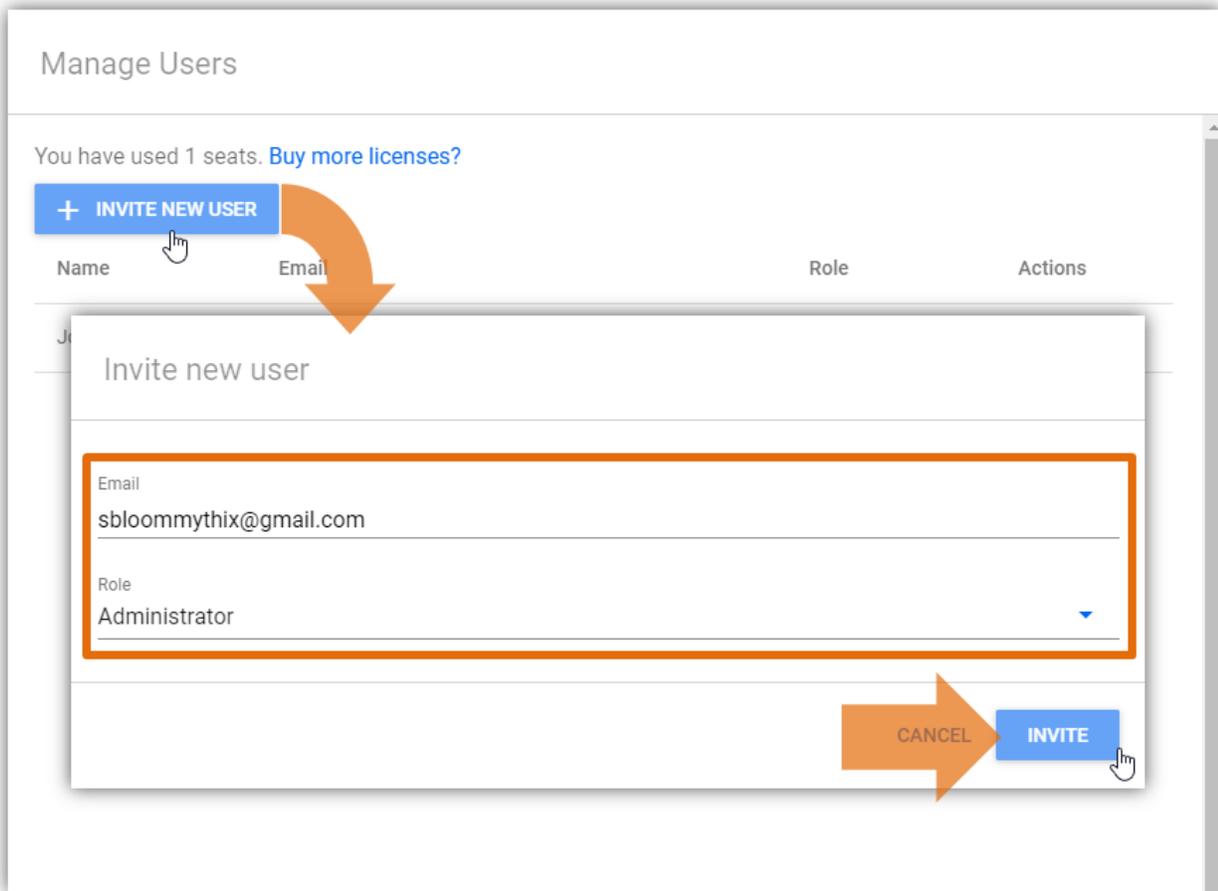
Building your Team

Add your teammates to Esticom and start collaborating on projects. This feature enables you to allow authorized users to access and manage projects.

1. Click the **Menu** and select **User Management**.
 - a. The **Manage Users** window will appear.



2. Click **+ INVITE NEW USER** to add team members.
 - a. The **Invite new user** dialog box will appear.



3. In the **Email** field, enter the team member's email address.
4. In the **Role** field, click the drop-down arrow to select the member's role.
 - Administrator
 - Limited Estimator
 - Manager
 - Sales
 - Estimator
 - Field Personnel
5. Click **Invite** to proceed.
 - a. The invited user's information will appear on the list in the **Manage Users** window.

- Once the invited users accept your invitation, they will have access to the appropriate features and functions based on their role/credentials.

Manage Users

You have used 1 seats. [Buy more licenses?](#)

+ INVITE NEW USER

Name	Email	Role	Actions
Joseph	sbloomenchantix@gmail.com	Owner	
(invited User)	sbloommythix@gmail.com	Administrator	▼ 🗑️ DELETE

[CLOSE](#)

Projects

The Projects tab lets you create new projects and manage existing ones. In this tab, you can view the [Projects Dashboard](#), duplicate projects, clone projects to template, archive or delete selected projects.

Projects Dashboard

The Projects Dashboard is the default page when you access the Projects tab. It displays all projects under your account. The Status Flow column lets you view projects with its appropriate status (e.g. Estimating, Bid Submitted, Accepted, etc.) enabling you to navigate to your projects with ease.

ESTICOM
Projects
Calendar
Material Catalog
Training
J Joseph ▼

+ ADD NEW PROJECT
↓ Creation Date
☰
🔍 Search...

Estimating (2) \$ 566	Bid Submitted (1) \$ 0	Accepted (1) \$ 7,044	In Progress (0) \$ 0	Complete (1) \$ 0	Delayed (0) \$ 0
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 40%;"> <p>House 1 Electrical</p> <p>House 1 Electrical - Test</p> </div> <div style="width: 15%;"> <p>\$ 566</p> <p>Joseph</p> </div> <div style="width: 15%;"> <p>📅 Past Due</p> <p>Estimating ▼</p> </div> <div style="width: 10%;"> <p>📄 1</p> <p>📄 1</p> </div> <div style="width: 10%;"> <p>23 days ago</p> <p>⋮</p> </div> </div>					
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 40%;"> <p>Structured Cabling Demo Project</p> <p>Includes structured cabling plans and common assemblies.</p> </div> <div style="width: 15%;"> <p>\$ 0</p> <p>Joseph</p> </div> <div style="width: 15%;"> <p>📅 Past Due</p> <p>Estimating ▼</p> </div> <div style="width: 10%;"> <p>📄 0</p> <p>📄 0</p> </div> <div style="width: 10%;"> <p>25 days ago</p> <p>⋮</p> </div> </div>					

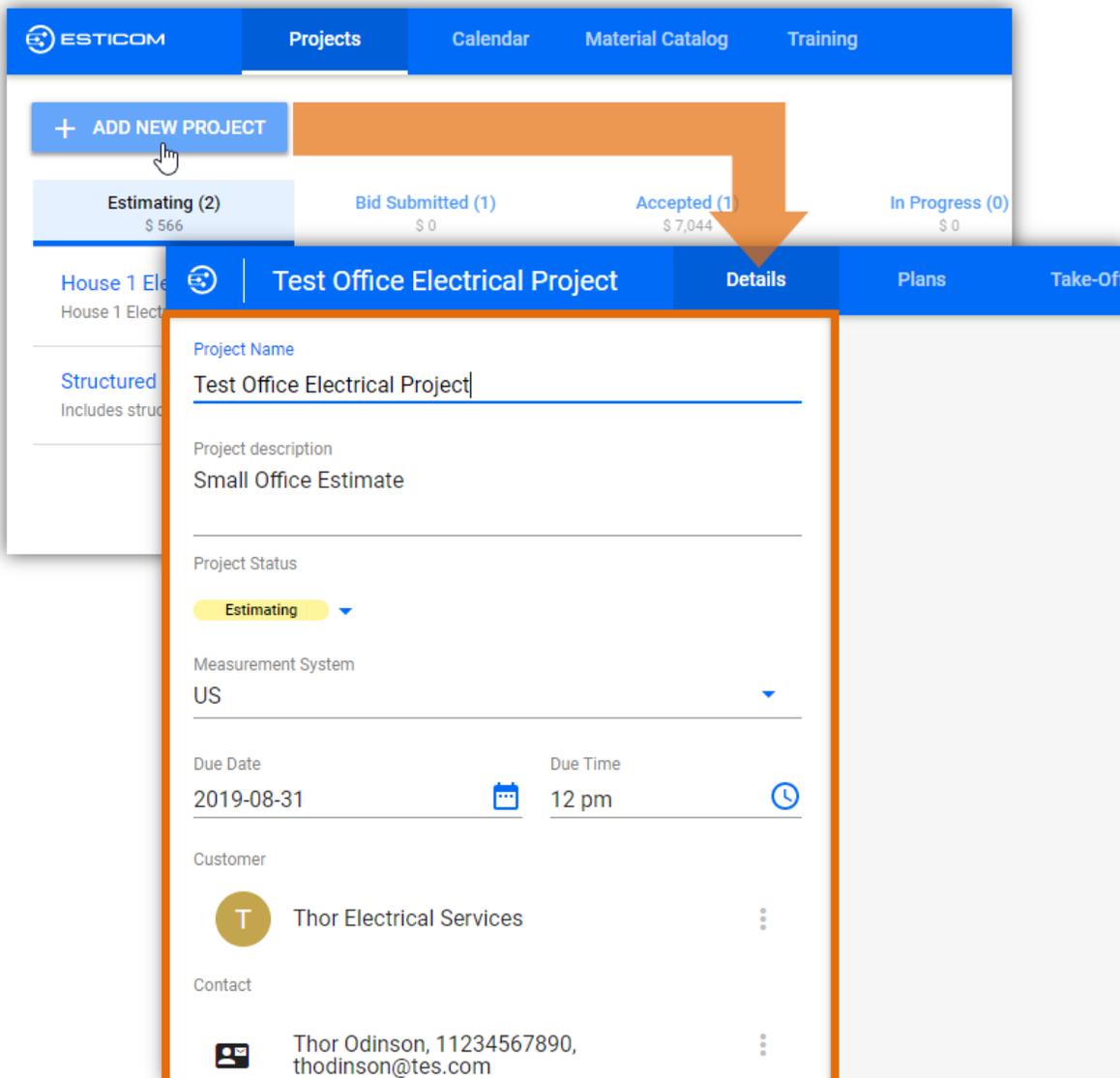
Creating Projects

The summarized project creation procedure covers the whole process of how to create new projects. Because of the intuitive nature of Esticom, it provides straightforward project creation flow where you start from specifying its details, uploading plans, manage take-offs, and generate bid estimates.

For an in-depth and comprehensive step by step instructions, we added links to relevant topics for each STEP. Simply click the links to jump to the appropriate topics.

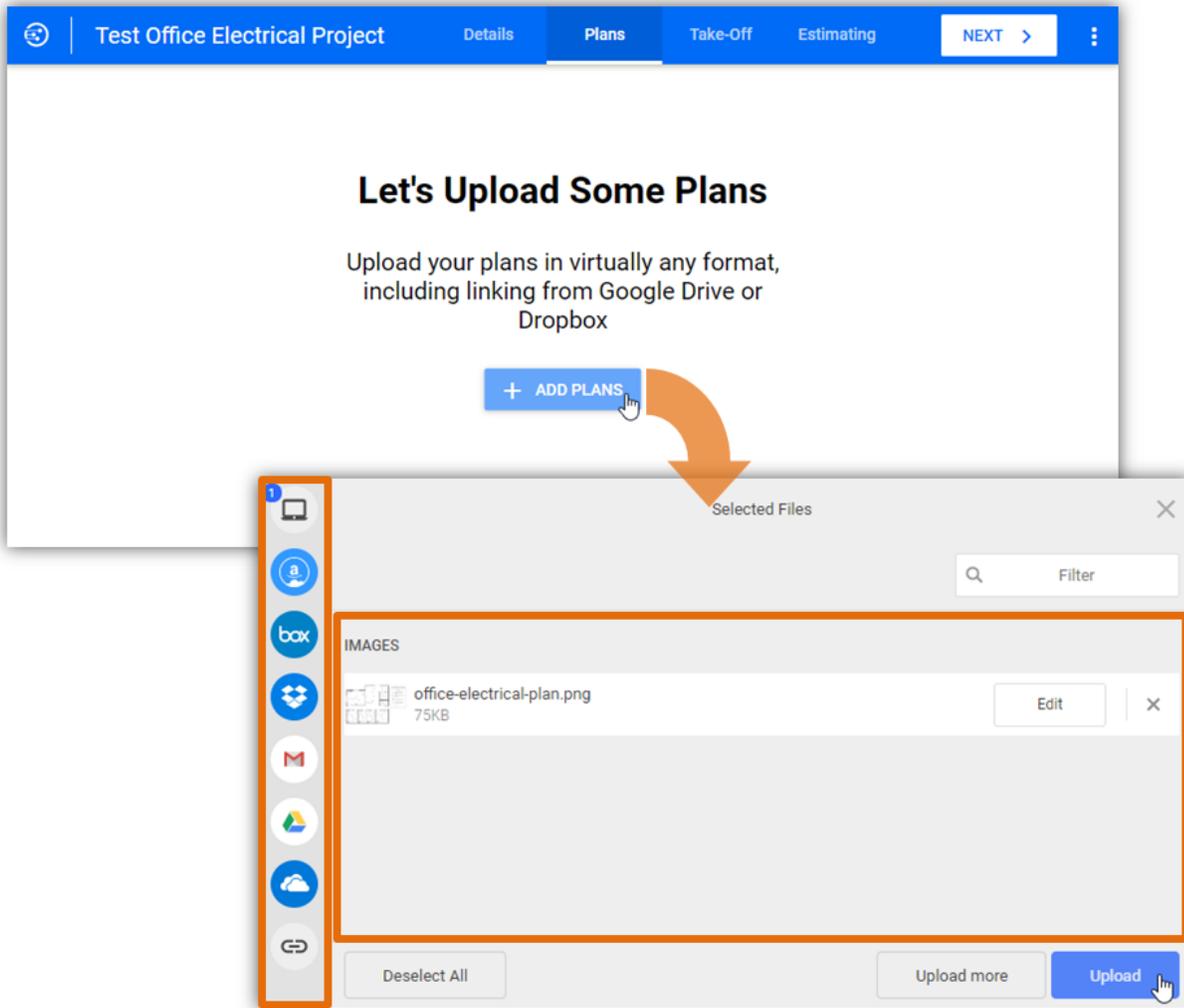
STEP 1 Create a New Project and specify its details

Go to the Projects tab and click **+ ADD NEW PROJECT**. This directs you to the project's Details tab where you can specify the project details. After specifying the project details, click **NEXT** to upload the plan(s). See [Specifying Project Details](#) for more information.



STEP 2 Start Uploading Plans

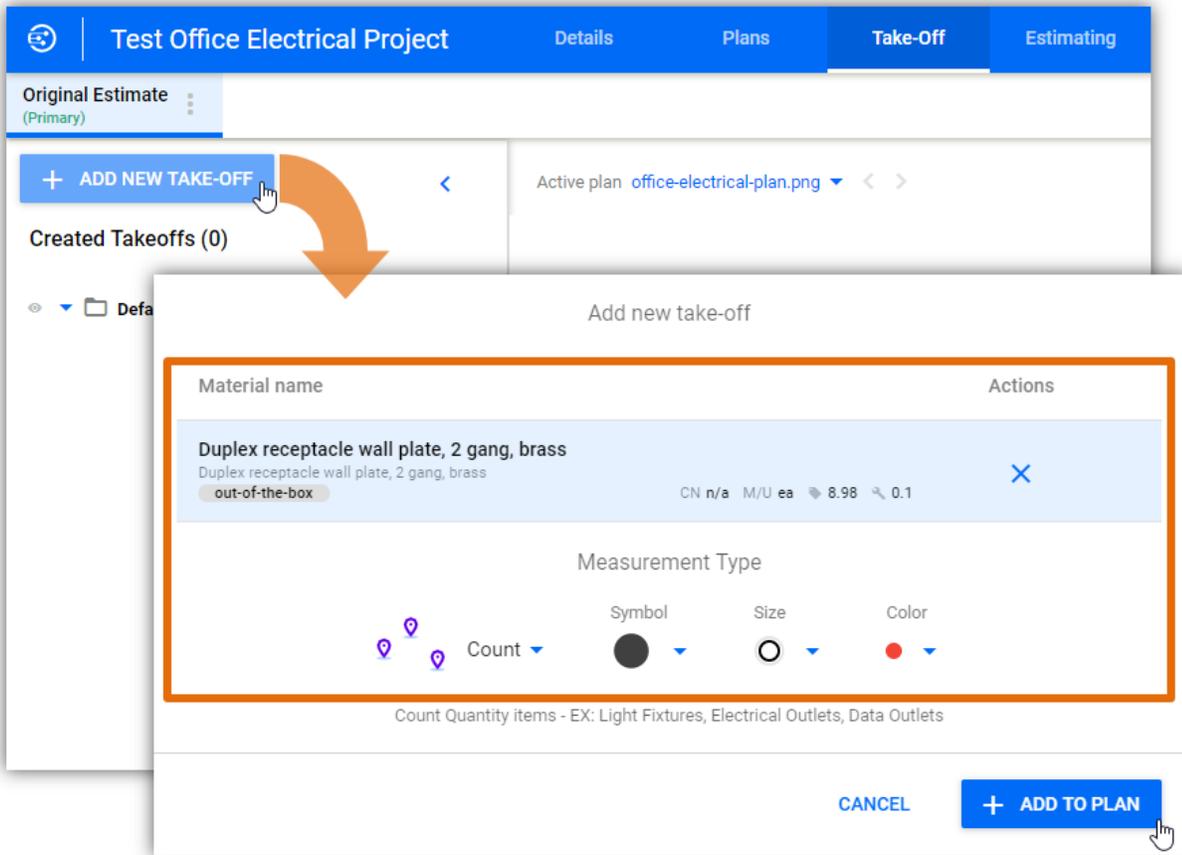
The Plans tab enables you to upload new plans and manage existing ones. To upload project plans, click **+ ADD PLANS**. The Upload Files window will appear where you can upload files directly from your device or from other supported platforms. After uploading the plan(s), click **NEXT** or click the Take-Off tab to proceed. See [Uploading Plans](#) for more information.



It is important to note that [Setting the Plan Scale](#) at this stage is vital as it determines the measurement between the plan and actual project.

STEP 3 Create Take-Offs

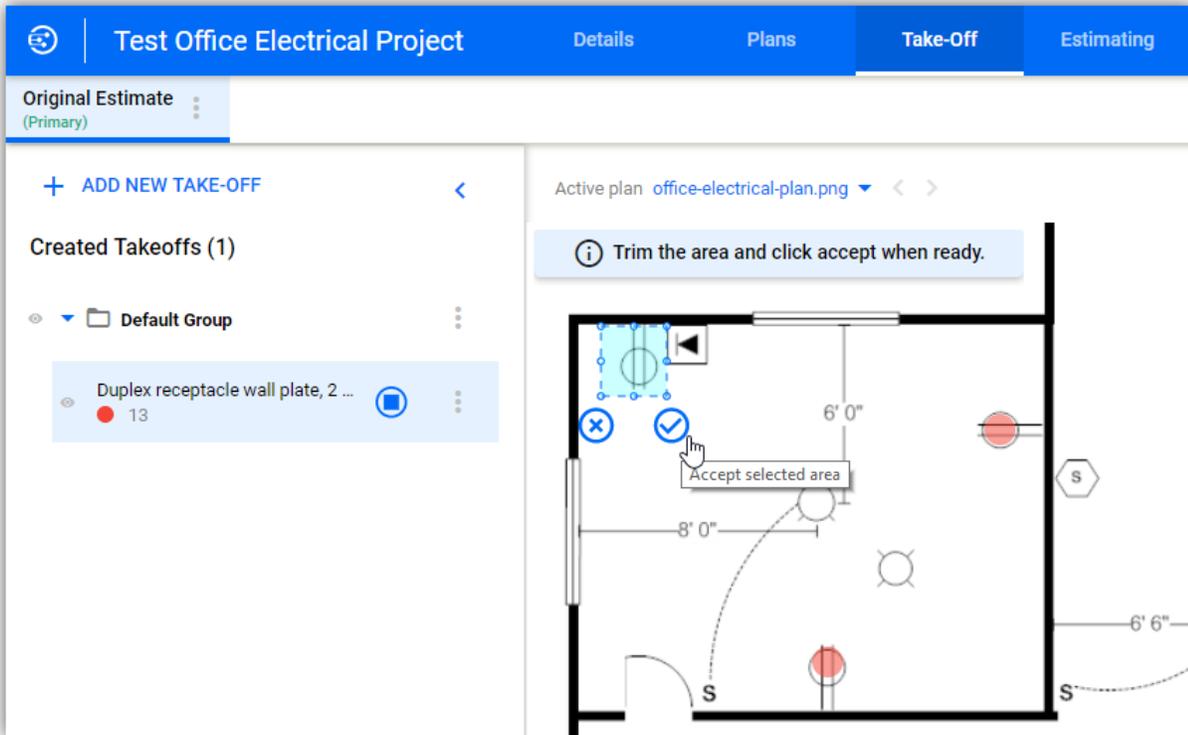
The Take-Off tab is where you manage the project’s take-offs. This tab enables you to create new take-offs and manage existing ones. Click **+ ADD NEW TAKE-OFF** to open the Add new take-off window.



Note: for demonstration purposes, we will use the Count take-off type.

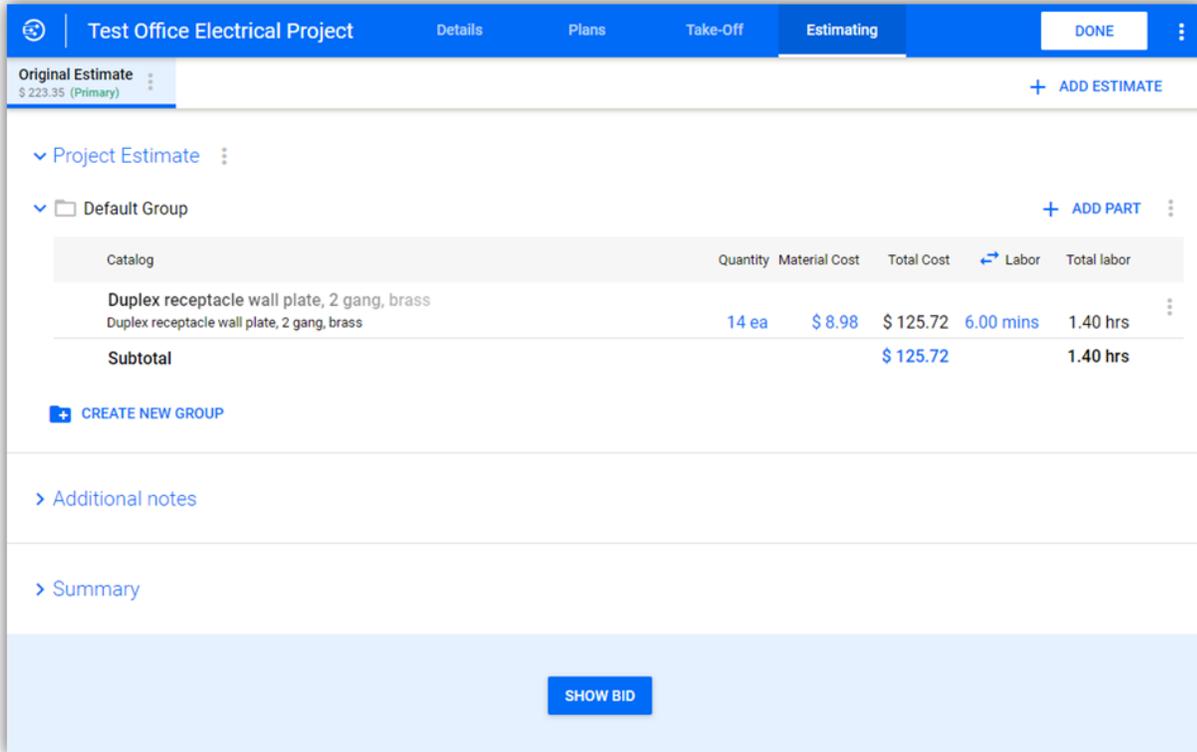
In this window, you get to add new material or use the one that we have in our Catalog. After specifying the material, define the take-off type by clicking the Take-off drop-down menu and select Count. Set other parameters such as Symbol, Size, and Color then click **+ADD TO PLAN**.

You can now manually select the symbol that you want to add to the counts or use the AUTO-COUNT feature. After creating the take-off, click **NEXT** to proceed to the Estimating tab. See [General Take-Off Procedure](#) for comprehensive guides on Take-Offs.



STEP 4 Generate Bid Estimates

The Estimating tab enables you to view project estimates, set labor costs, and profit margins, and generate downloadable bid estimates.



Review the [Project Estimate](#), [Additional Notes](#), and [Summary](#) sections before generating the bid estimate. If there is a need for adjustments, you can update the pricing and costs by changing the appropriate value.

After thoroughly reviewing the bid estimate, click **SHOW BID** to view the PDF preview of the bid. In this preview, you can add or exclude values by selecting the preferred options. Download the bid estimate in PDF by clicking the **EXPORT BID** button. You just completed the project! See Bid Estimates for more details on the Estimating tab.

Additional Adjustments	Taxes ⓘ	Others	Total
Overhead <input type="text" value="0"/> % ~ \$ 0.00	Labor Tax <input type="text" value="0"/> % ~ \$ 0.00	Bonding <input type="text" value="0"/> % ~ \$ 0.00	\$ 223.35
Lost Time <input type="text" value="0"/> % ~ \$ 0.00	Materials Tax <input type="text" value="0"/> % ~ \$ 0.00		
Waste <input type="text" value="0"/> % ~ \$ 0.00			
Discount % <input type="text" value="0"/> % ~ -\$ 0.00			
Total Adjustments \$ 0.00	Total Taxes \$ 0.00	Total Others \$ 0.00	

SHOW BID

Summary

Price		Taxes	
Labor and Adjustments	\$ 43.75	Labor and Adjustments Tax	\$ 0.00
Materials	\$ 179.60	Materials Tax	\$ 0.00
Subtotal	\$ 223.35	Total Taxes	\$ 0.00

Total **\$ 223.35**

Accepted By _____ Date _____

Values displayed may be rounded to two decimal places

<input checked="" type="checkbox"/> Show Quantity	<input checked="" type="checkbox"/> Show Taxes	<input type="checkbox"/> Round Bid Total
<input checked="" type="checkbox"/> Show Price	<input type="checkbox"/> Show Groups Only	
<input type="checkbox"/> Show Combined Unit Cost	<input type="checkbox"/> Group By Plan	
<input checked="" type="checkbox"/> Show Labor and Materials	<input type="checkbox"/> Show Lump Sum	

EXPORT BID

Specifying Project Details

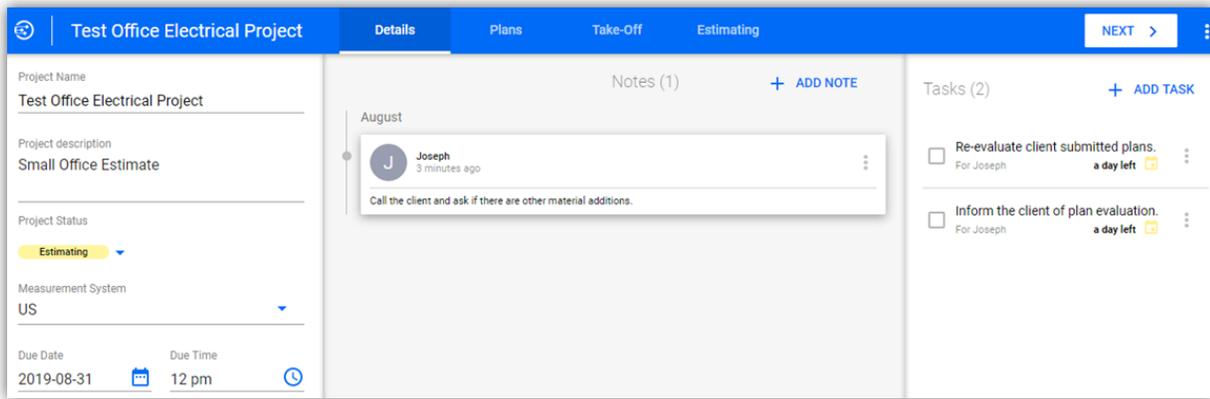
The first step when creating new projects is to add relevant information. This information helps you and your team to come up with a strategic approach on how to successfully close the project.

The screenshot displays the 'Details' tab for a project named 'Test Office Electrical Project'. The interface includes a navigation bar with tabs for 'Details', 'Plans', 'Take-Off', and 'Estimating'. The main content area is divided into sections for Project Name, Project description, Project Status, Measurement System, Due Date, Due Time, Customer, Contact, Location, and Owner. Each section contains a text input field or a dropdown menu, with some fields having icons for calendar or clock to facilitate date and time selection.

Field	Instructions
Project Name	Enter the project name.
Project Description	Enter a brief project description.
Project Status	Click the drop-down arrow to select the current project status. By default, new projects will have the Estimating Status.
Measurement	Click the drop-down arrow to select the client's preferred measurement system.
Due Date	Click the field to enable the Calendar and select the appropriate due date.

Due Time	Click the field to enable the Clock and select the appropriate due time. By default, after selecting the due date, the time will be set to 12 PM.
Customer	Click the + ADD CUSTOMER LINK to select a customer from the existing lists or add a new customer.
Contact	If the selected customer registered their contact information, this field automatically generated the customer’s contact details. Otherwise, click the +ADD CONTACT link to add the contact details.
Location	If the selected customer provided their address, this field automatically generates the customer’s location. Otherwise, click the +ADD LOCATION link to add the customer’s address.
Owner	This field automatically assigns the project to the signed-in user by default. However, you can click the Owner Menu icon to unassigned the project or change/assign to another estimator.

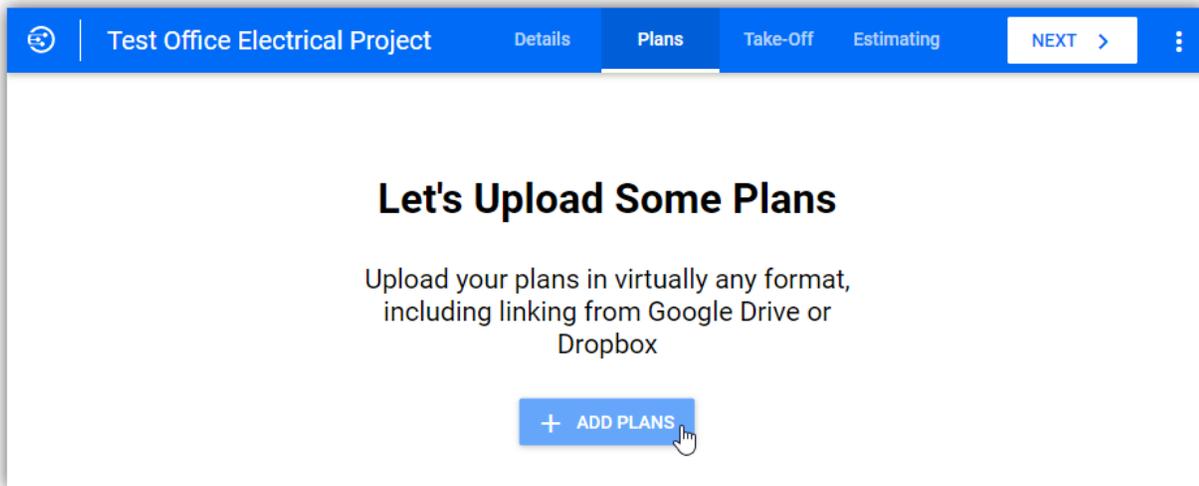
The Details tab also enables you to utilize the Notes and Tasks panel to include notes and tasks to the project.



Uploading Plans

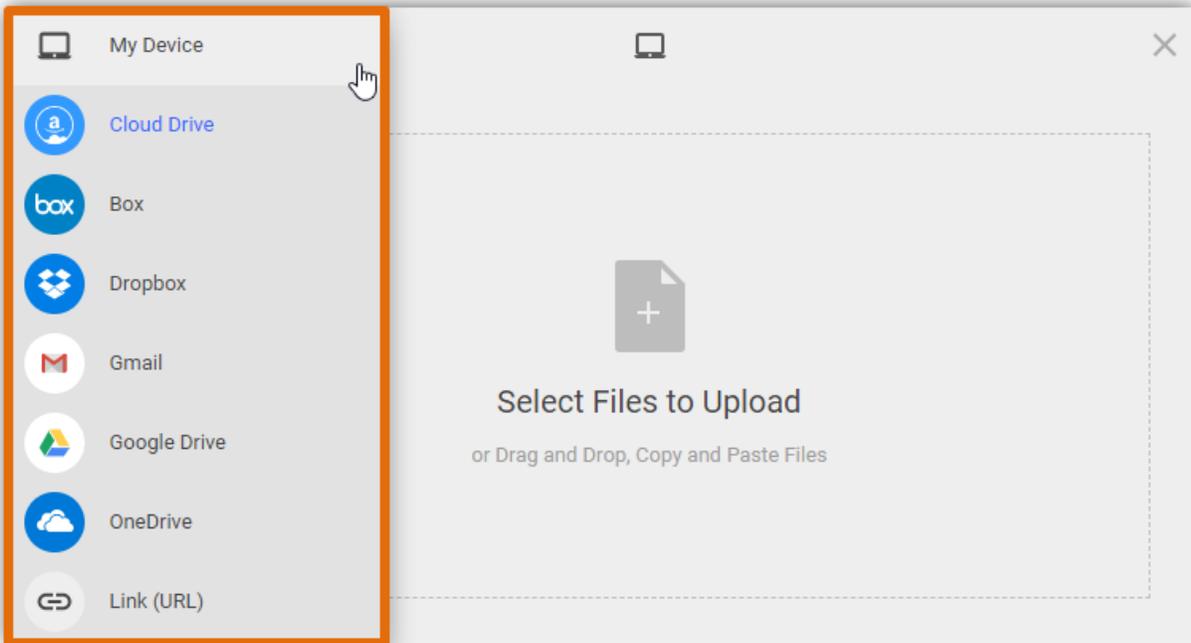
Once you specified the project details, you can now start adding plans to your project. You can add at least one file or more including files that are stored in a folder.

1. Ensure that you are in the **Plans** tab. If not, click the **Plans** tab in the **Project Flow** tabs.



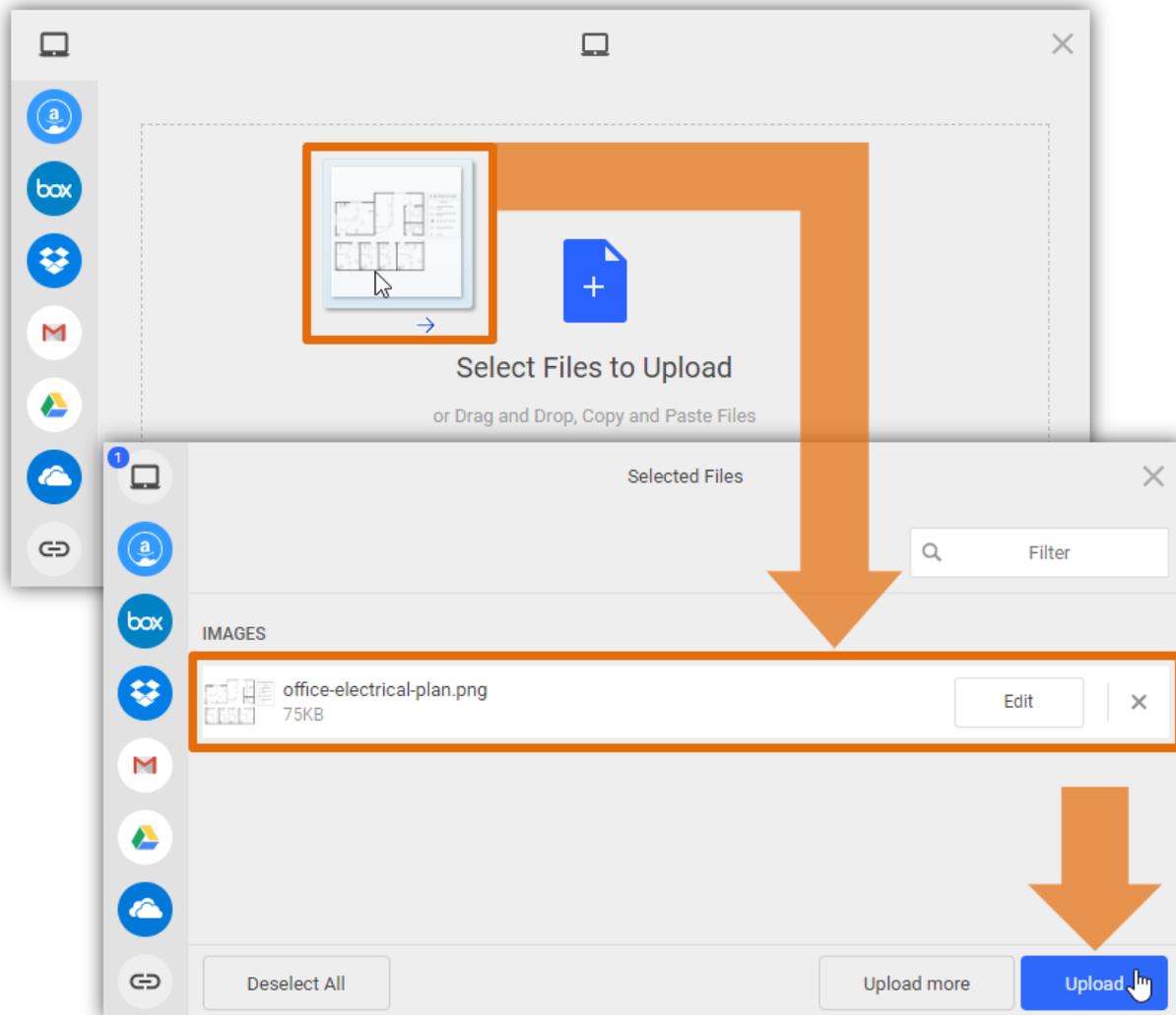
2. Click **+ADD PLANS** to enable the **Upload Files** window.

3. In this window, you can upload files directly from your device or from the following platform:



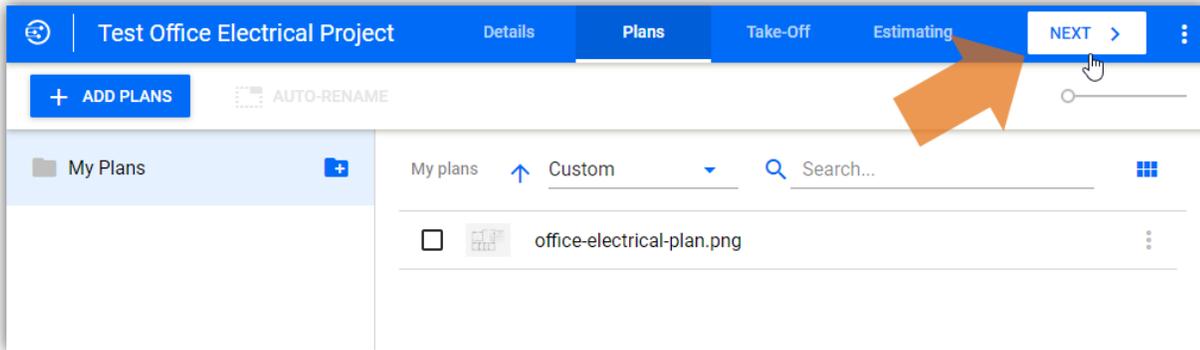
- Cloud Drive
- Box
- DropBox
- Gmail
- Google Drive
- OneDrive
- Link or File URL

Note: Drag and Drop method is enabled for plan uploads, simply drag the file from any source and drop it in the Select Files to Upload pane. In this example, we dragged the file from the local device and dropped it in the Select Files to Upload pane.



4. After adding the plan(s) to your project, click **Upload** to start uploading the selected file(s).
 - a. The uploaded plans will appear on the **My plans** pane.

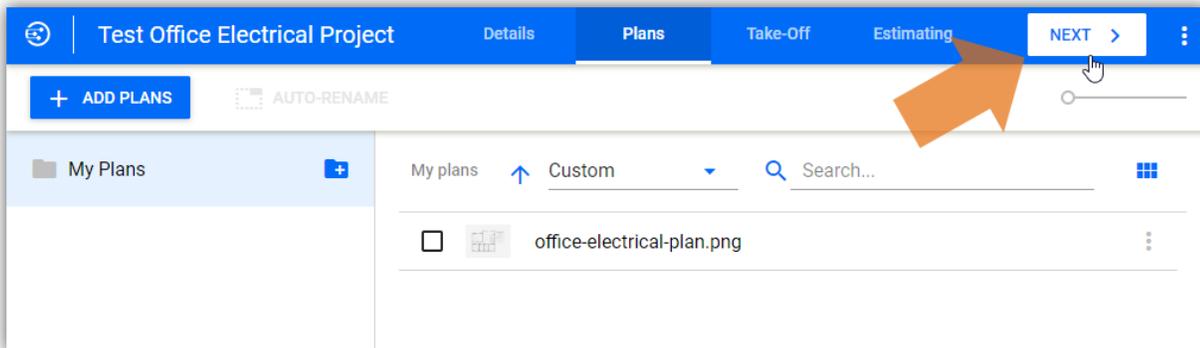
5. Click **NEXT>** or click the **Take-Off** tab to continue.



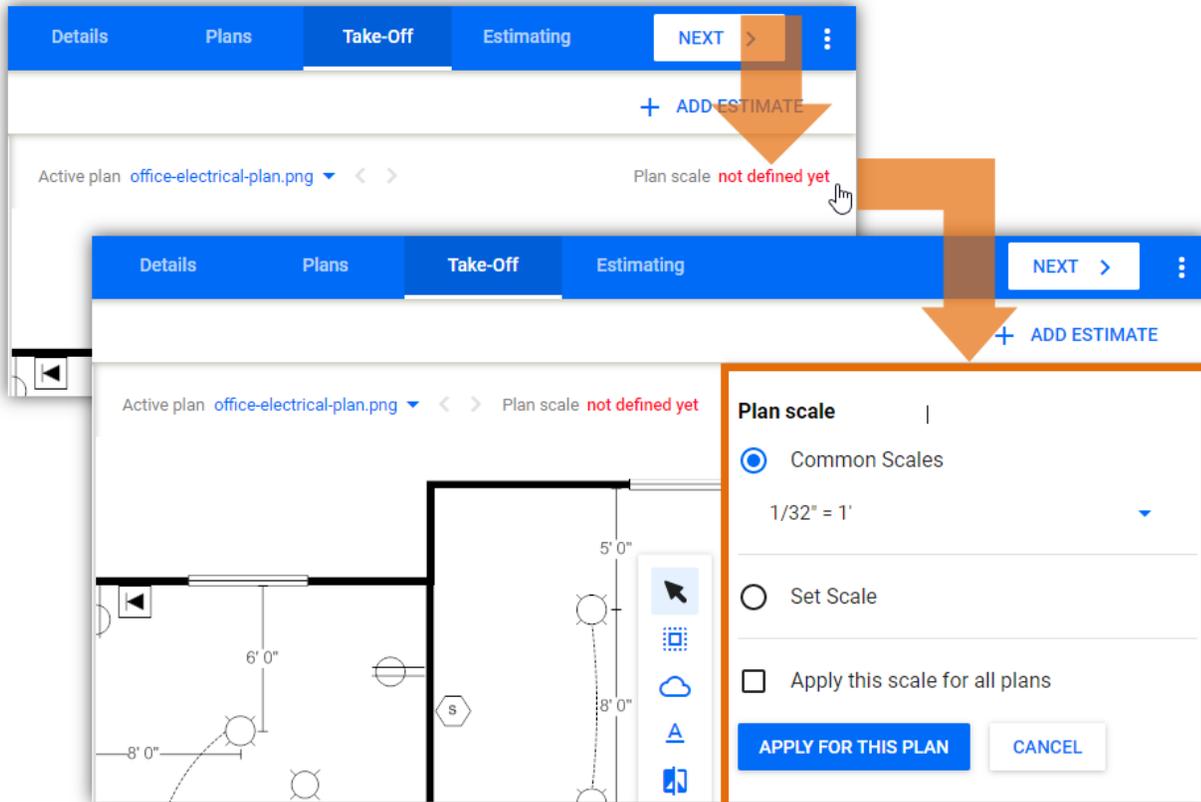
Setting the Plan Scale

By default, new projects don't have the plan scale configured. There are two (2) methods to configure the plan scale; you can use the existing (a) Common Scale(s) or manually set the plan scale by selecting the (b) Set Scale radio button.

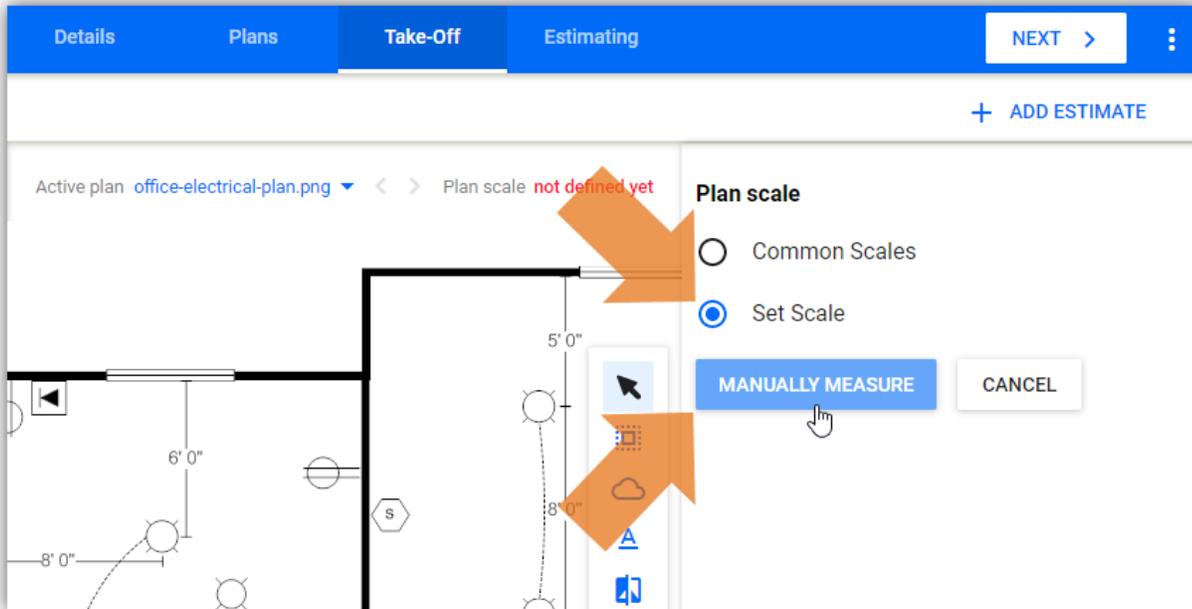
1. After uploading the plan, click **Next>** or the **Take-Off** tab to set the plan scale.



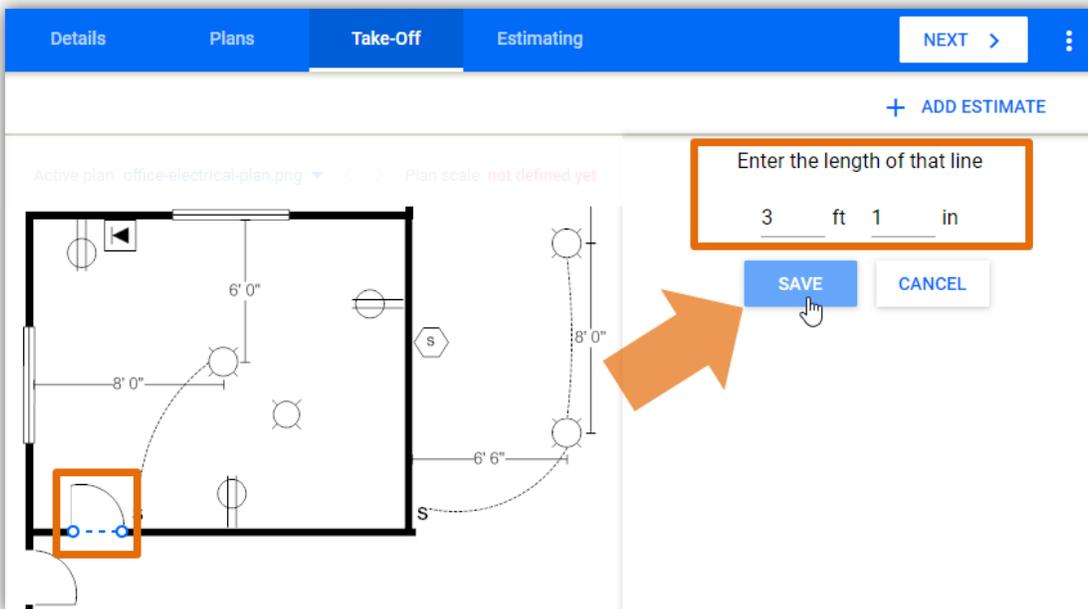
2. Click the **Plan scale** link to expand the **Plan scale** panel. If the plan scale is not yet configured, this link will show as **not defined yet**.
 - a. **Note:** if you want to use the common scale $1/32''=1'$. Select the **Common Scales** radio button.



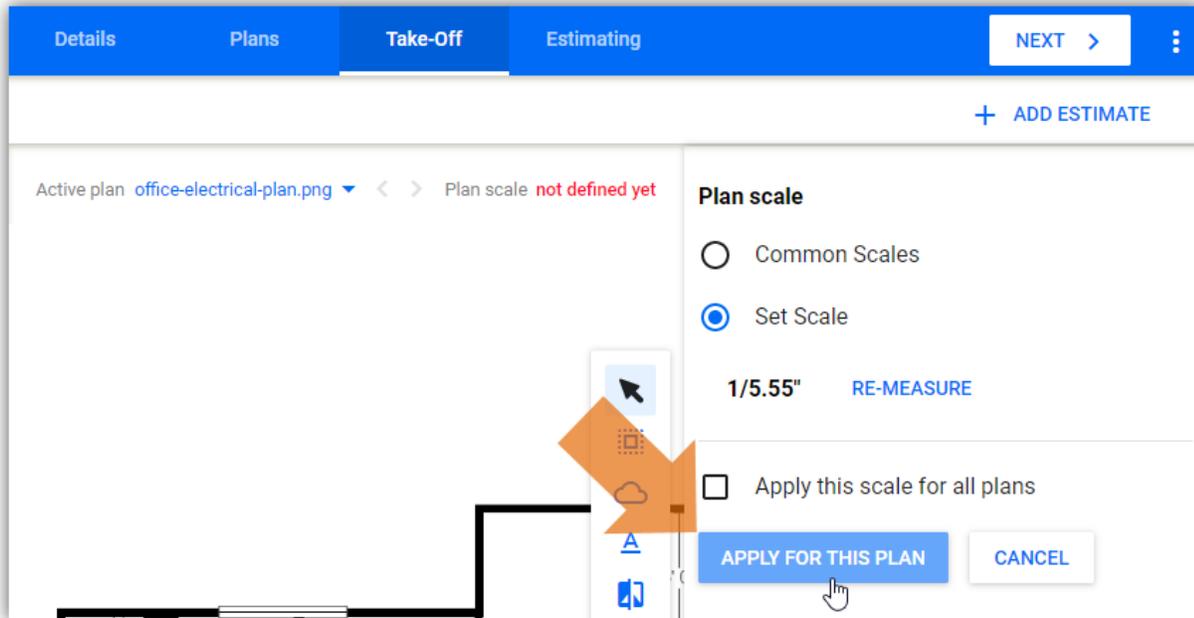
3. To manually set the plan scale, select the **Set Scale** radio button and click **MANUALLY MEASURE**.
 - a. This enables the reference line setting on the plan.



4. Draw a reference line on the plan by clicking from one point (start) to the other (end).
 - a. This will enable the **Scale** configuration panel.
5. In the **ft** field, enter the actual measurement in feet and in the **in** field, enter the plan reference length measurement in inches.
 - a. **Note:** when measuring the reference line, we suggest using the doorways as common US doorway measurement is at 3 feet. (i.e. reference measure is 3 ft = 1 in)



6. After defining the reference line, click **SAVE** to apply the plan scale.
 - a. You will be redirected to the **Scale** configuration panel.
7. Review the configured plan scale and click **APPLY FOR THIS PLAN** to complete the plan scale setting procedure.
 - a. **Note:** to apply this scale for all plans, click the **Apply this scale for all plans** checkbox.



General Take-Off Procedure

Managing take-offs with ease requires advanced features and tools. Esticom offers both as its Take-Off tab enables you to create a wide variety of take-offs for every trade there is.

In this Quick Start Guide, we cover three take-off types that are commonly utilized by users.

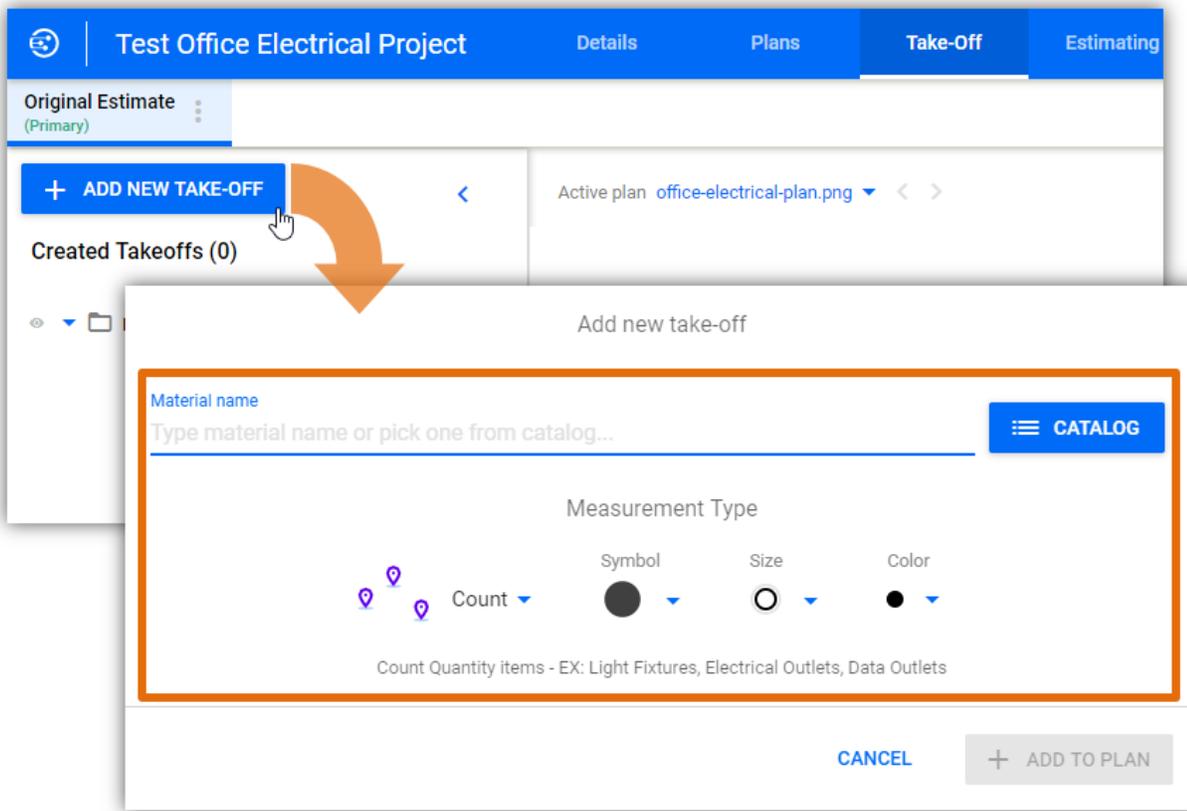
- [Counts Take-Off](#)
- [Linear Take-Off](#)
- [Area / Volume Take-Off](#)

One of the notable features Esticom is very proud of is the take-off's Tool Pallet. This handy tool allows you to manage take-offs with ease.

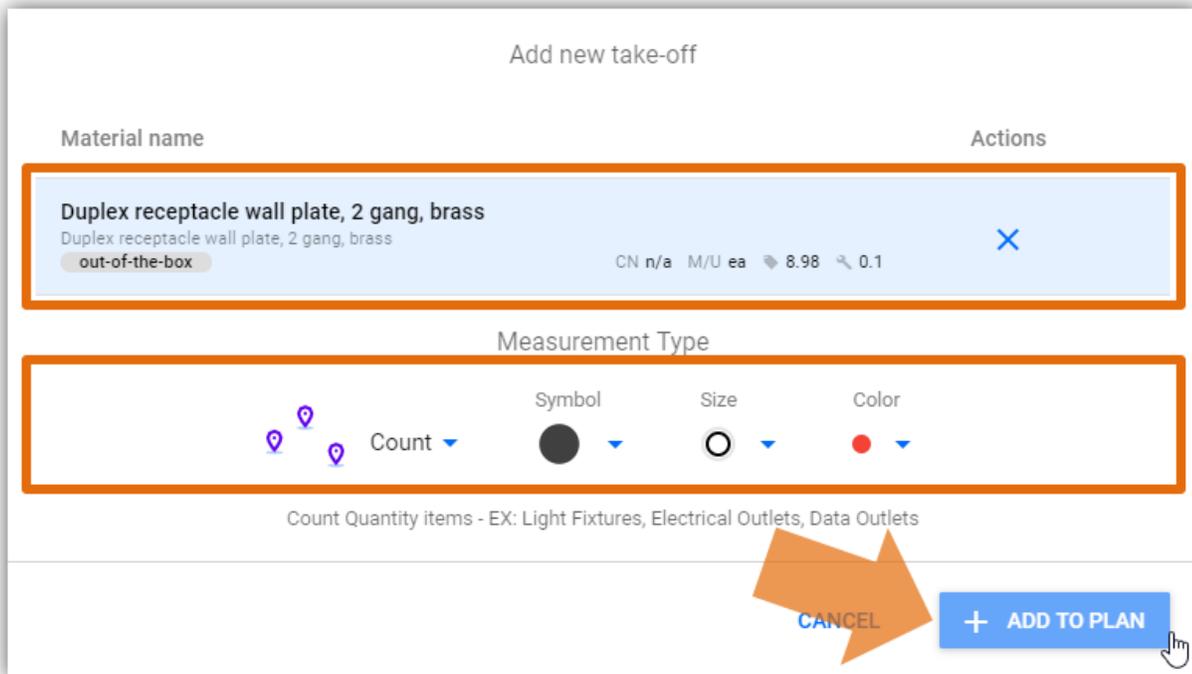
Counts Take-Off

The Count type lets you add the summary of all counted items through symbol selection on the uploaded plan(s). You can manually select each symbol or use the advanced Auto-Count feature wherein Esticom will automatically count similar symbols based on your selection. The auto-count method provides a faster way of counting materials with precision.

1. Click **+ADD NEW TAKE-OFF**.

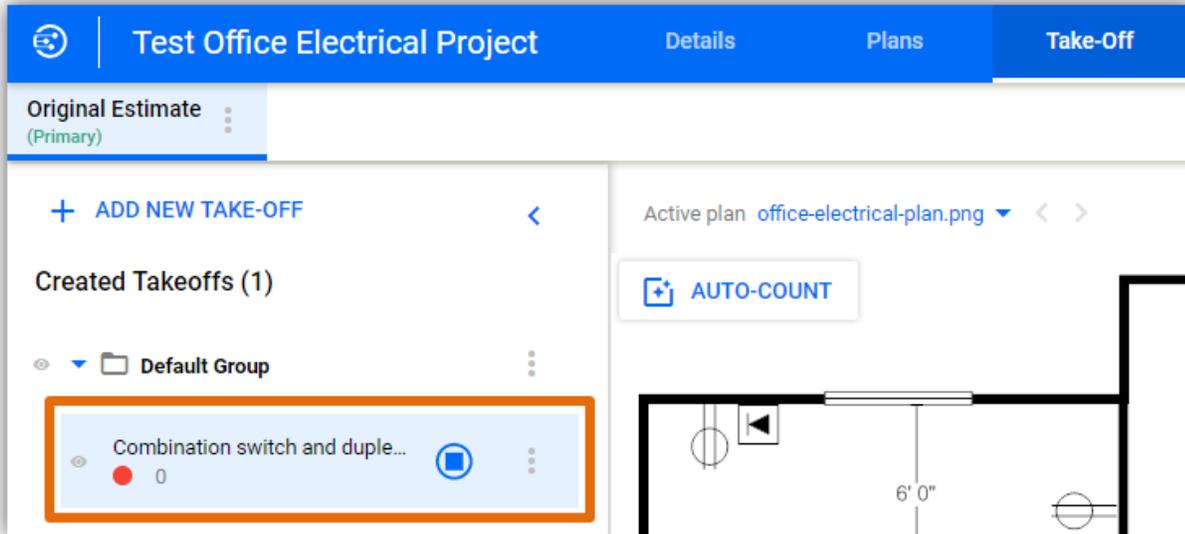


2. Enter the **Material Name**.
 - a. **Note:** you can also use Esticom’s existing materials by clicking the **CATALOG** button. When using materials from the catalog, always check if it matches the client’s specification and its unit prices.
3. Click the **Take-off** menu and select **Count**.

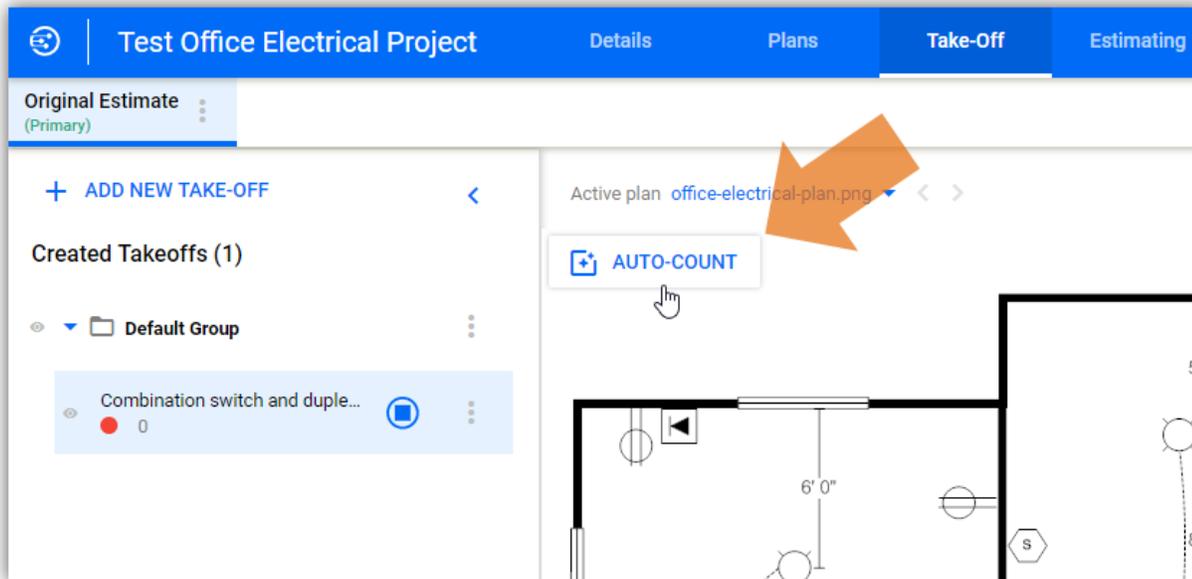


4. Customize the **Symbol**, **Size**, and **Color** settings. Choosing the preferred width and color aesthetically enhances the plans’ visual properties.
5. Click + **ADD TO PLAN** to proceed.
 - a. **Note:** before starting the material count, ensure that the plan scale is properly configured. See [Setting the Plan Scale](#).

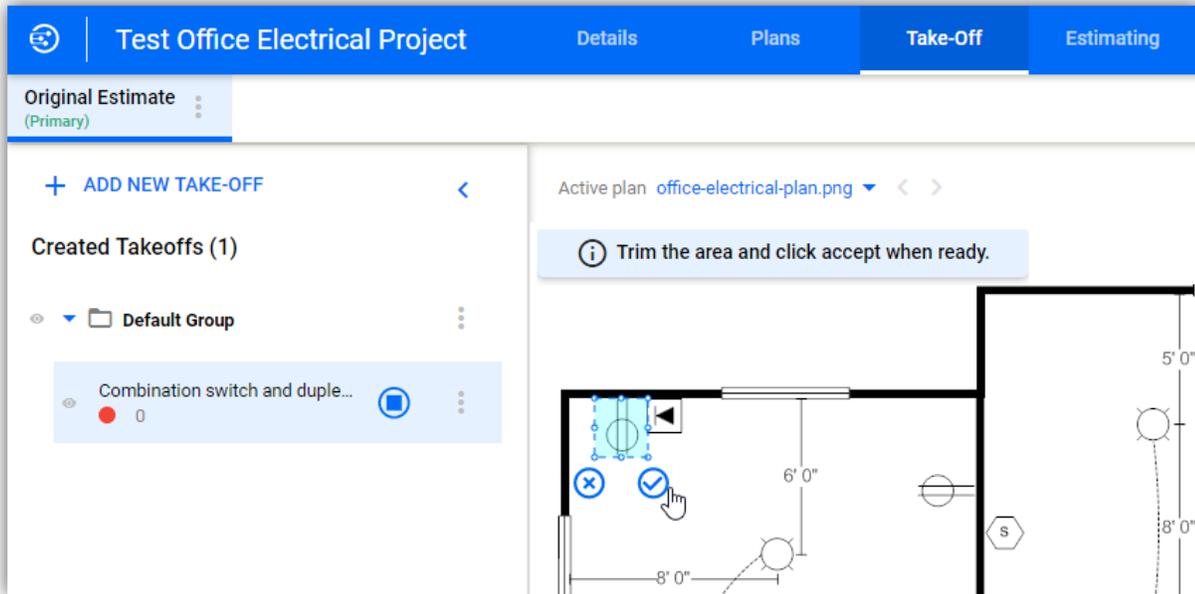
- After adding the material, it will display an indicator that it is now active and ready for use. There are two (2) material counting methods; (a) **Manual counting** – manually click on each material and (b) **Auto-Count** – this method automatically counts similar symbol using Esticom’s advanced symbol recognition feature.



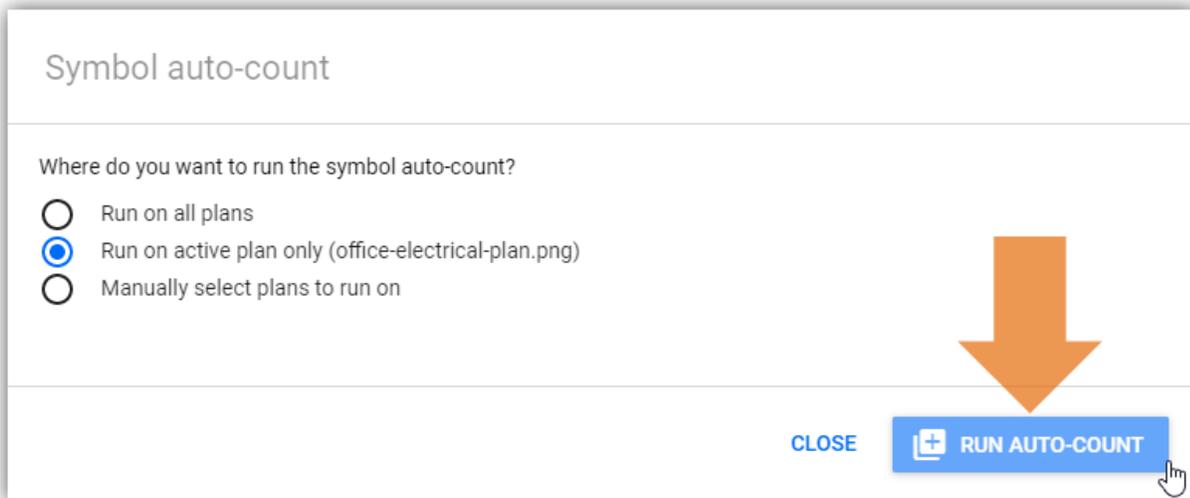
- To use the **Auto-Count** feature, click the **AUTO-COUNT** button.



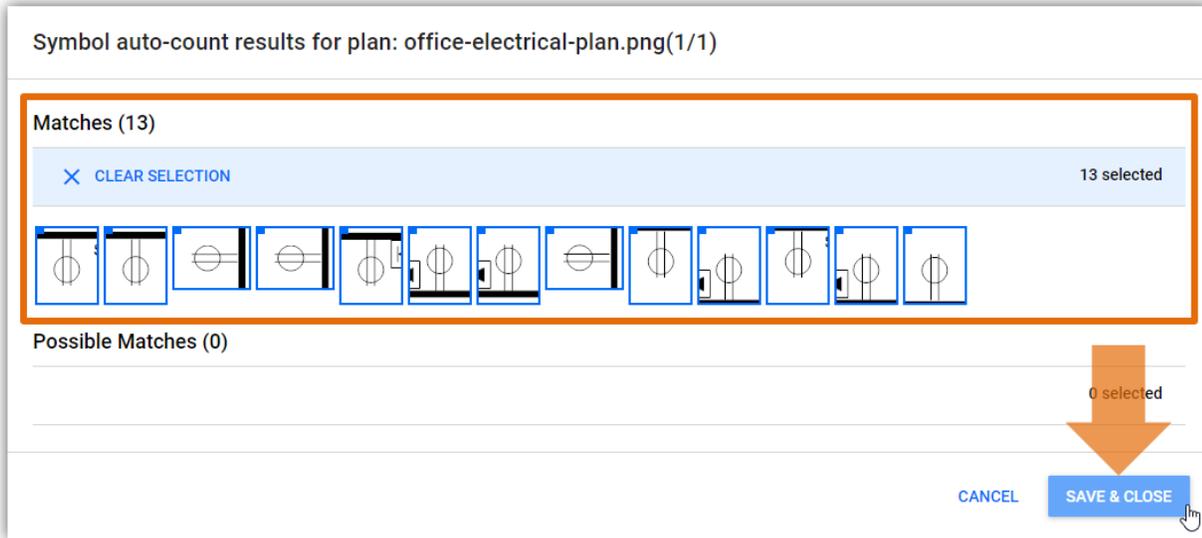
8. Draw a rectangle around the symbol that will be counted automatically.
 - a. **Note:** Click once to start drawing the rectangle. After drawing the rectangle, click once to complete the selection.
9. An **X** and **✓** will appear under the selected symbol. Click **✓** to continue with the auto-count.
 - a. The **Symbol auto-count** dialog box will appear.



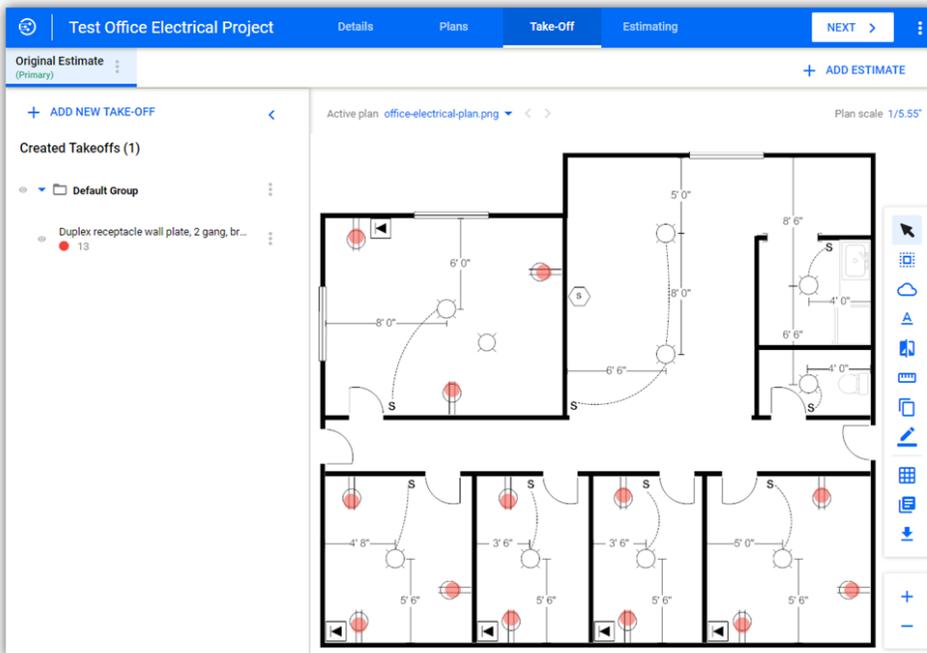
10. To run the auto-count on the active plan, select the **Run on active plan only <name of plan>** radio button.
 - a. **Note:** you can run the auto-count on all plans within this project by selecting the **Run on all plans** radio button. If you want to manually select which plans to run the auto-count on, select the **Manually select plants to run on** checkbox.



11. After defining the auto-count parameters, click **RUN AUTO-RUN**.
 - a. The **Symbol auto-count results for plan: <name of plan>** window will appear.
12. In this window, symbol matches and possible matches are displayed for verification. In the **Matches** section, check if all the symbols match. If not, deselect the symbol. Lastly, check the symbols under the **Possible Matches** section and select the symbol that matches the selected one.
 - a. **Note:** you can remove all selected symbols by clicking the **X CLEAR SELECTION** link.



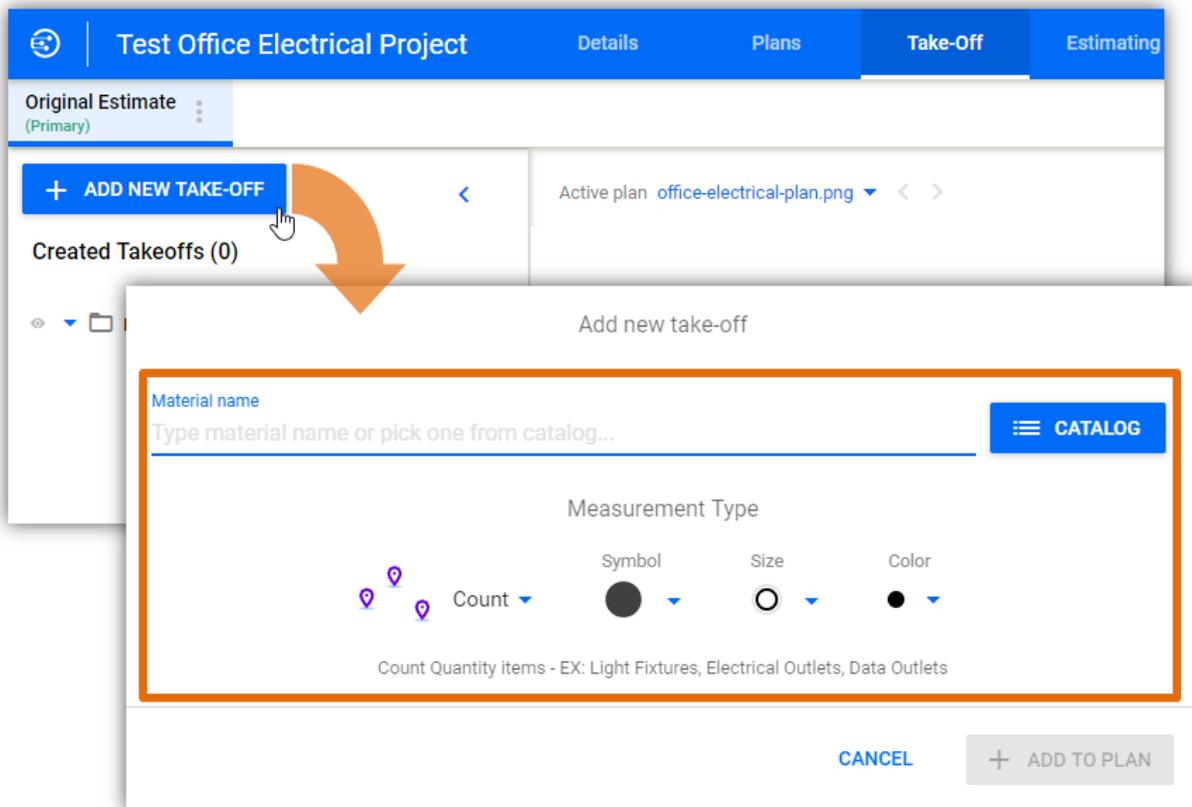
13. Click **SAVE & CLOSE** to complete the auto-count.
 - a. The selected symbols will be marked and counted. The counted number of materials will appear under the **Take-Off** name.



Linear Take-Off

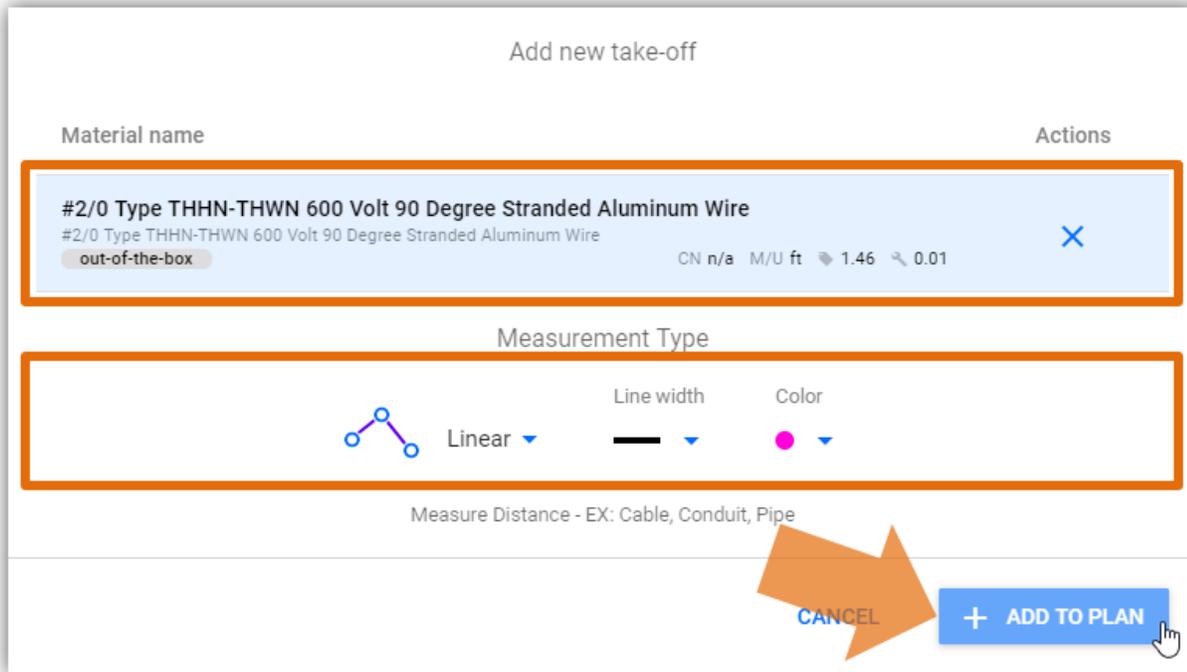
The Linear type enables you to measure the distance from one point to the next. This comes in handy when measuring the distance covered by the specified materials (e.g. telephone cable, duplex wires, cords, etc.).

1. Click **+ADD NEW TAKE-OFF**.

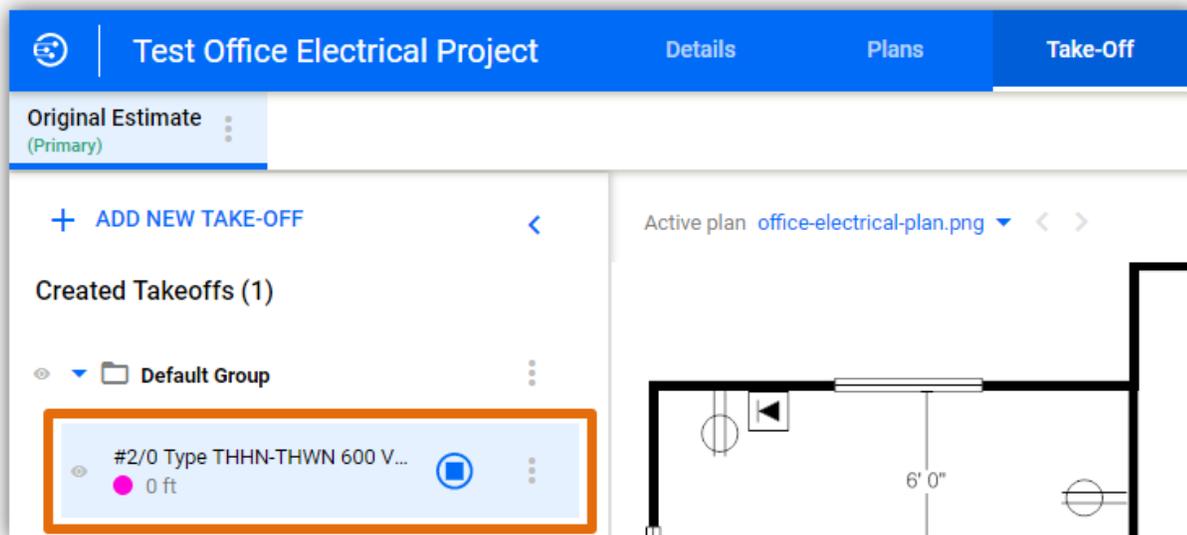


2. Enter the **Material Name**.
 - a. **Note:** you can also use Esticom's existing materials by clicking the **CATALOG** button. When using materials from the catalog, always check if it matches the client's specification and its unit prices.
3. Click the **Take-off** menu and select **Linear**.

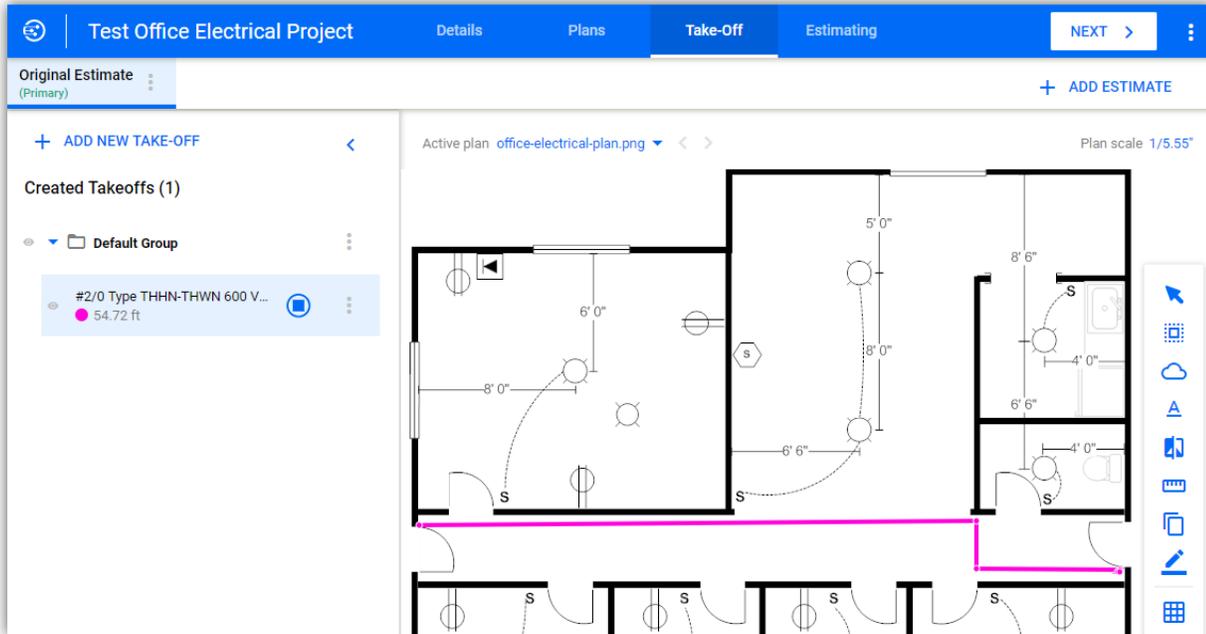
4. Customize the **Line width** and **Color** settings. Choosing the preferred width and color aesthetically enhances the plans' visual properties.



5. Click + **ADD TO PLAN** to proceed.
 - a. **Note:** before starting the linear measurement, ensure that the plan scale is properly configured. See [Setting the Plan Scale](#).
6. After adding the material, it will display an indicator that it is now active and ready for use. This take-off should be selected before starting to plot the segments. The selected take-off should be highlighted in blue.



7. On the **Active Plan** pane, point and click the cursor to the **Starting** point of the measurement and repeat it by segment until you reach the **Endpoint** of the linear measurement.
 - a. **Note:** add multiple points/segments to accommodate the preferred linear measurement. To delete a segment, press the **Backspace** key on the **Keyboard**. Delete multiple segments by **Backspace** one segment at a time. To delete the entire line placement, press the **ESC** key on your Keyboard.

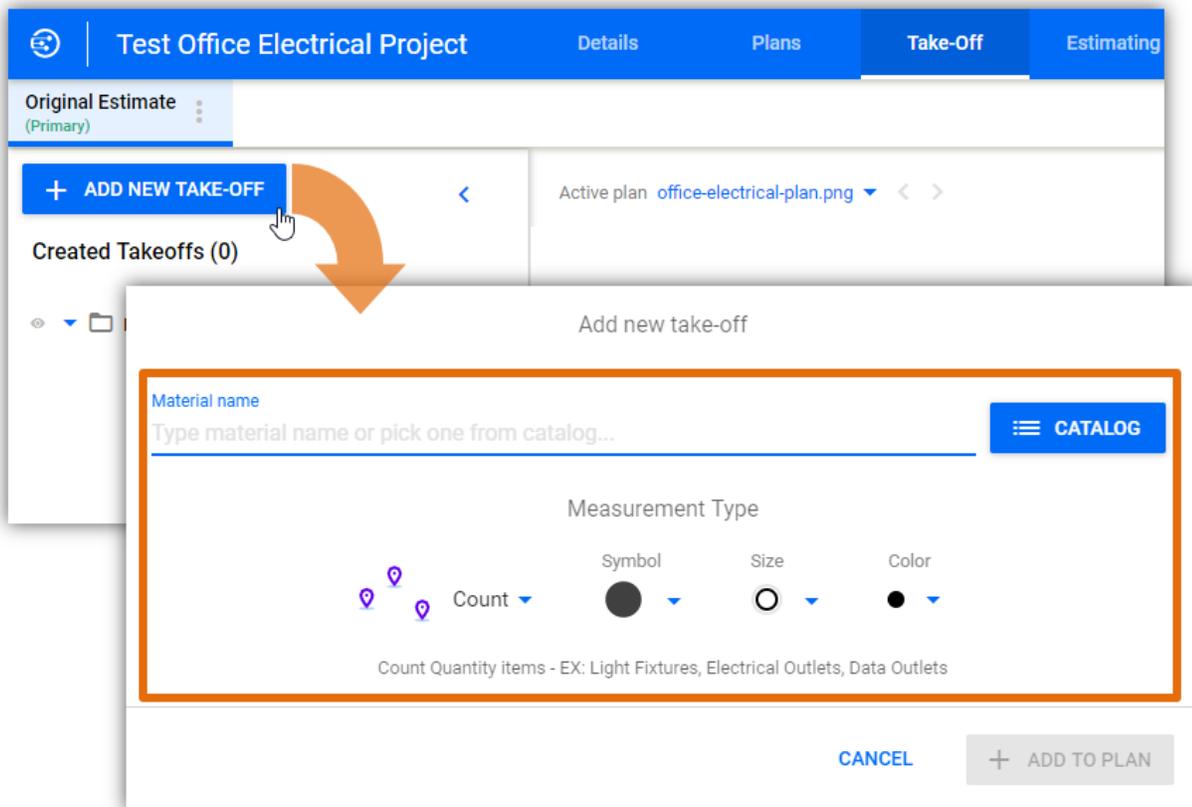


8. A linear measurement should appear, **Double-click** to complete the measurement.
 - a. The measured distance value will appear under the **Take-Off** name.

Area / Volume Take-Off

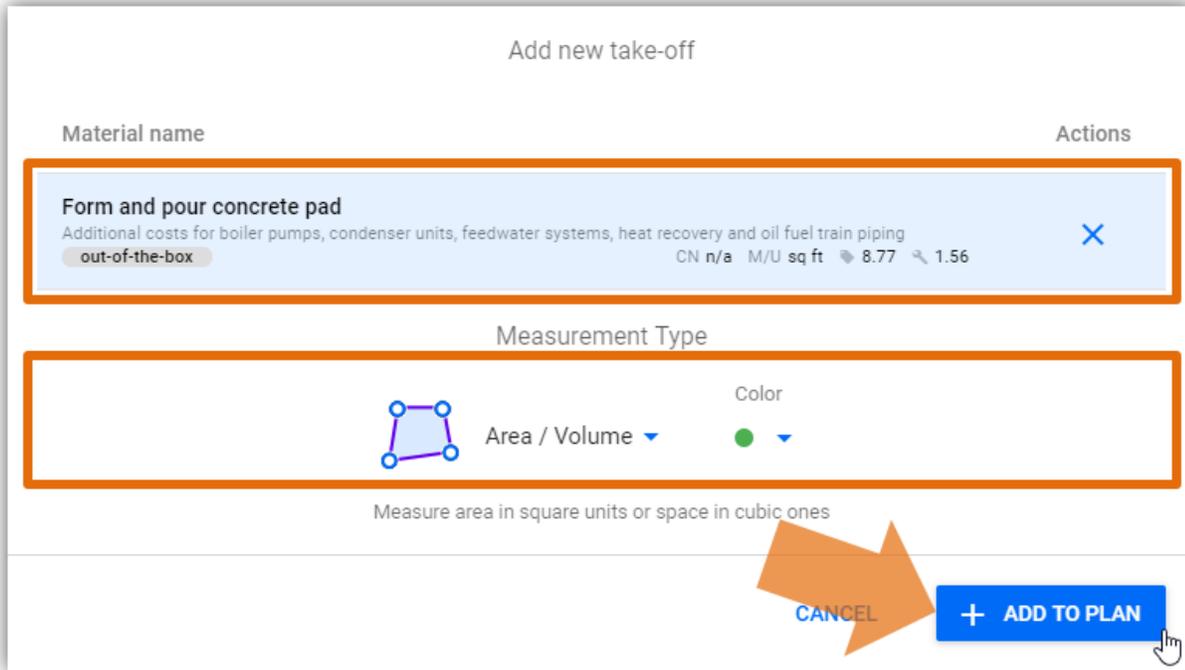
The Area / Volume type lets you measure the mapped area of the plan. This take-off type provides flexibility as it allows you to measure the area and/ or volume.

1. Click **+ADD NEW TAKE-OFF**.

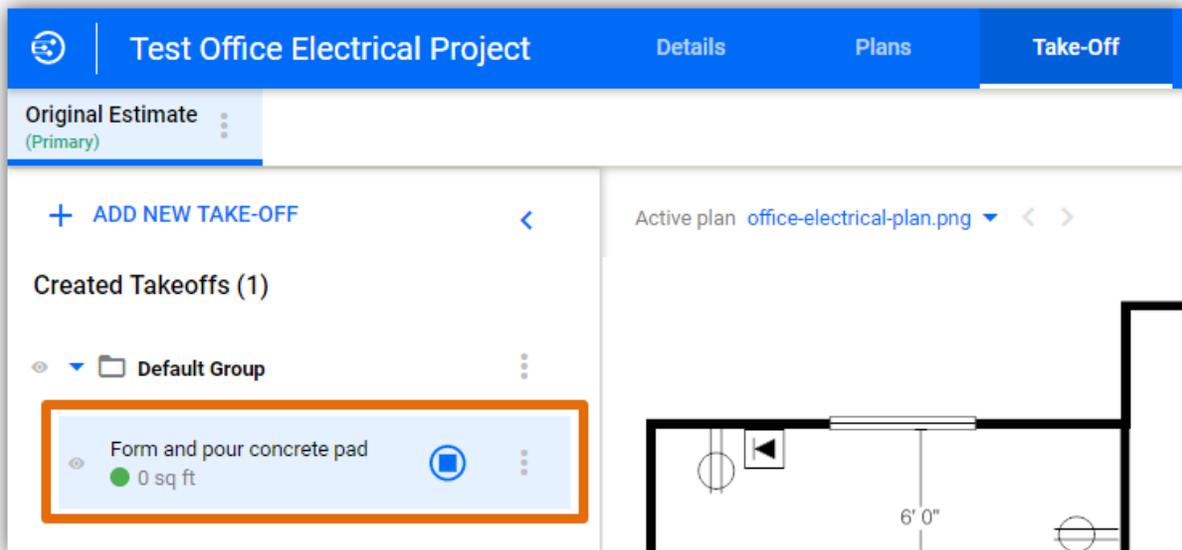


2. Enter the **Material Name**.
 - a. **Note:** you can also use Esticom's existing materials by clicking the **CATALOG** button. When using materials from the catalog, always check if it matches the client's specification and its unit prices.
3. Click the **Take-off** menu and select **AREA / VOLUME**.

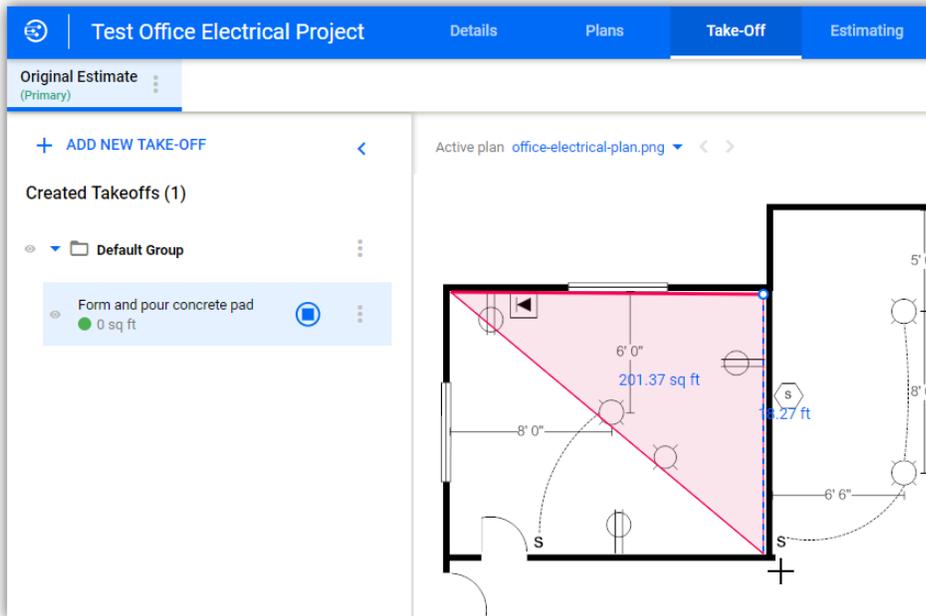
4. Customize the **Color** settings. Choosing the preferred width and color aesthetically enhances the plans' visual properties.



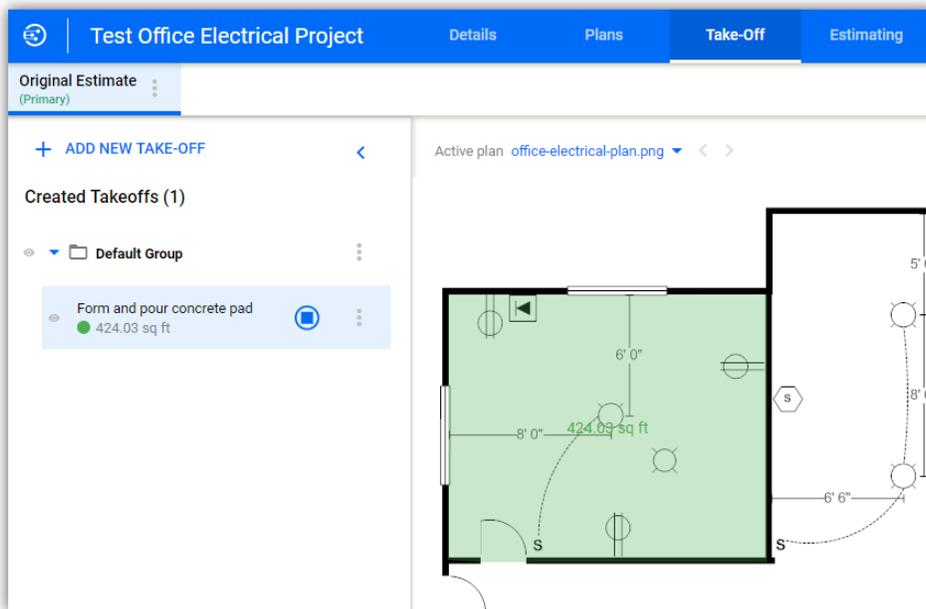
5. Click + **ADD TO PLAN** to proceed.
 - a. **Note:** before starting the area/volume measurement, ensure that the plan scale is properly configured. See [Setting the Plan Scale](#).
6. After adding the material, it will display an indicator that it is now active and ready for use. This take-off should be selected before starting to plot the segments. The selected take-off should be highlighted in blue.



7. On the **Active Plan** pane, click the area's **Starting** point followed by different points covering the area that you want to measure.
 - a. **Note:** To delete a point, press the **Backspace** key on the **Keyboard**. Delete multiple points by pressing the **Backspace** key one point at a time. To delete the entire measured area, press the **ESC** key on the **Keyboard**.

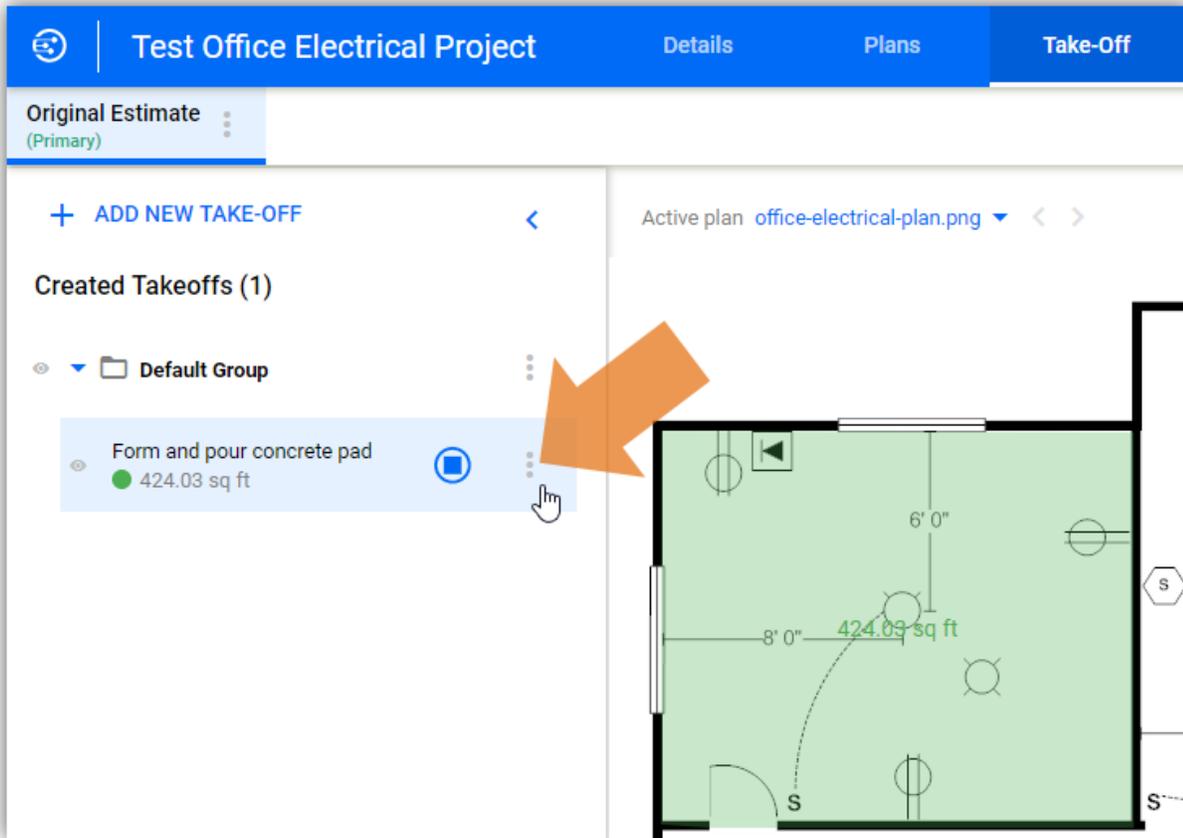


8. Double-click to complete the measurement. The selected area should be highlighted by the selected color.
 - a. The measured area will appear under the **Take-Off** name.

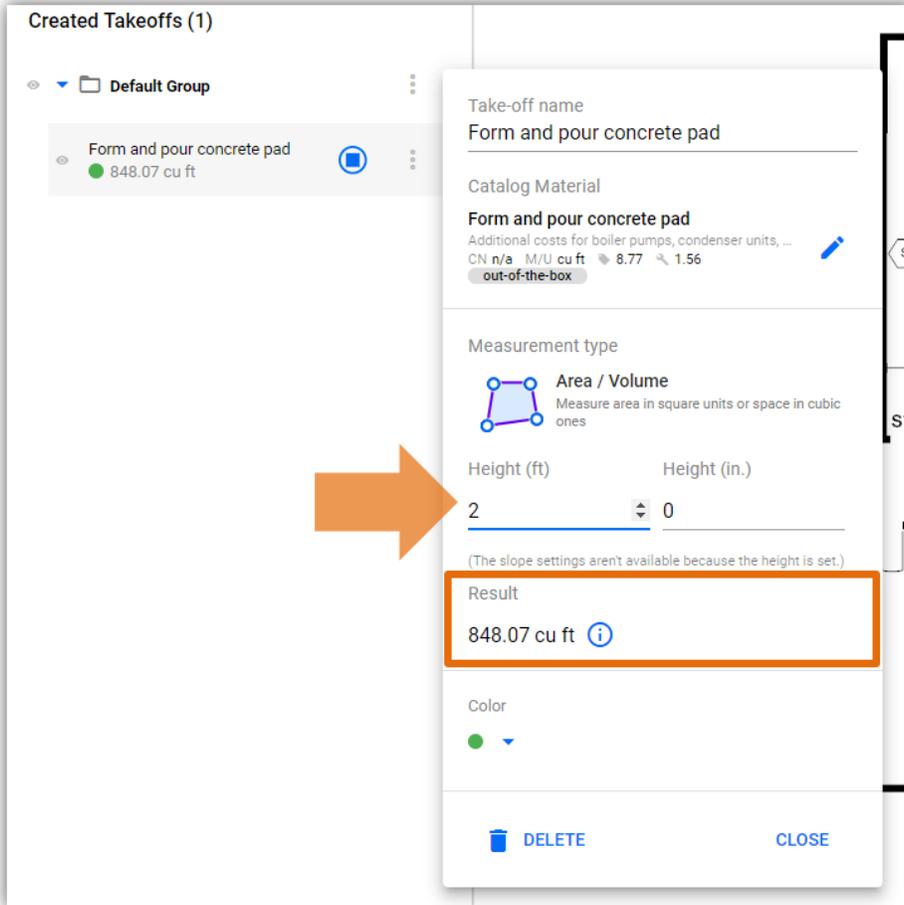


In cases of concrete slabs wherein, the depths and thickness needs to be indicated, specify the volume using the method below.

1. Follow the [Area/Volume Take-off](#) procedure.
2. In the **Created Takeoffs** list, find the take-off that you want to update.



3. Click its **Menu** to expand more options.



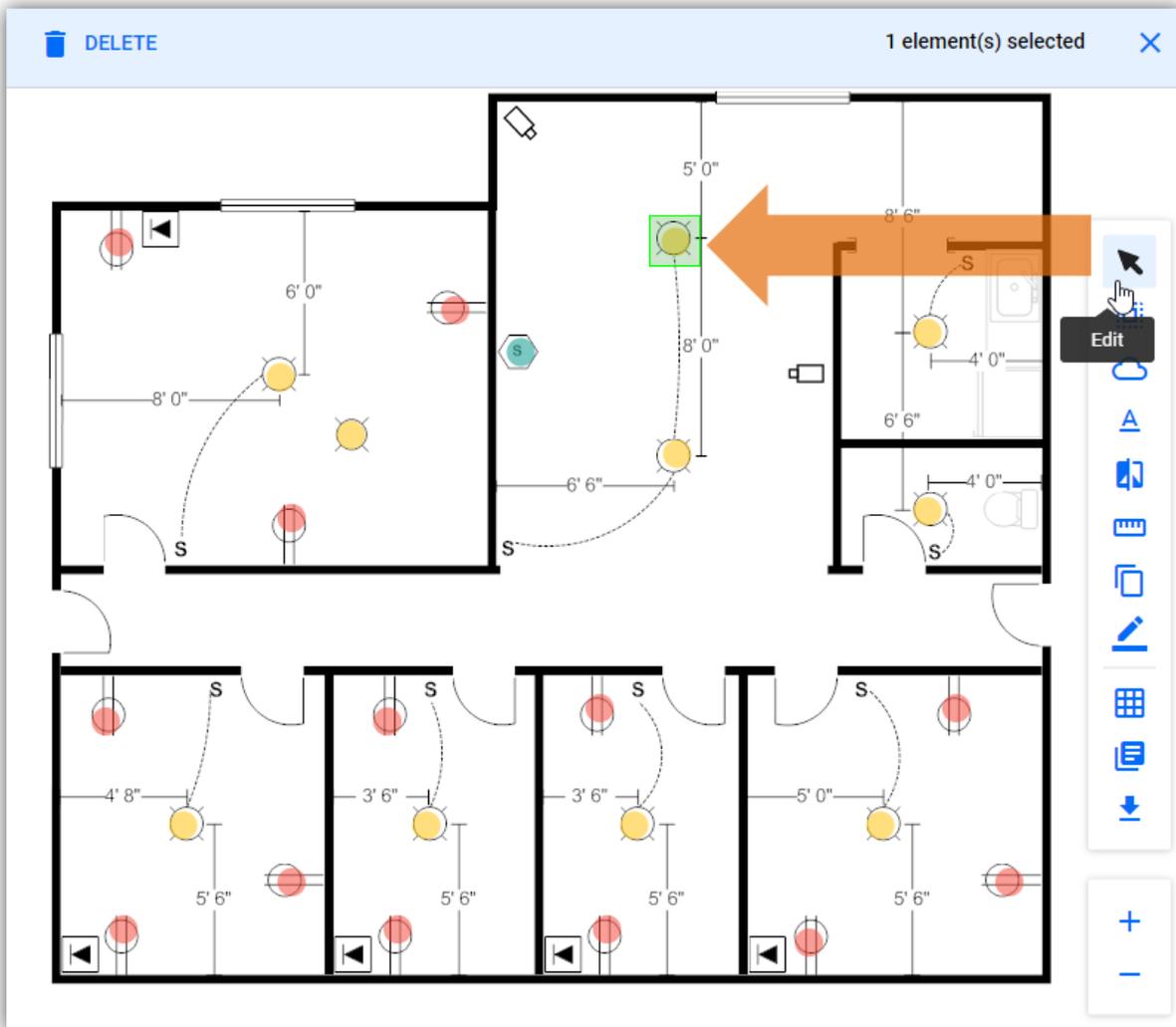
4. Find the **Height (ft)** field and enter the appropriate value.
5. The **Result** field will be updated and the unit type will change from **Square Foot** to **Cubic Foot**.

Tool Pallet

The Tool Pallet optimizes your take-off experience with its advanced yet straightforward functionality.

Arrow Tool

The Arrow icon is a selection tool that lets you select single items from the plan. When selected, you can edit the item which allows you to move and delete.



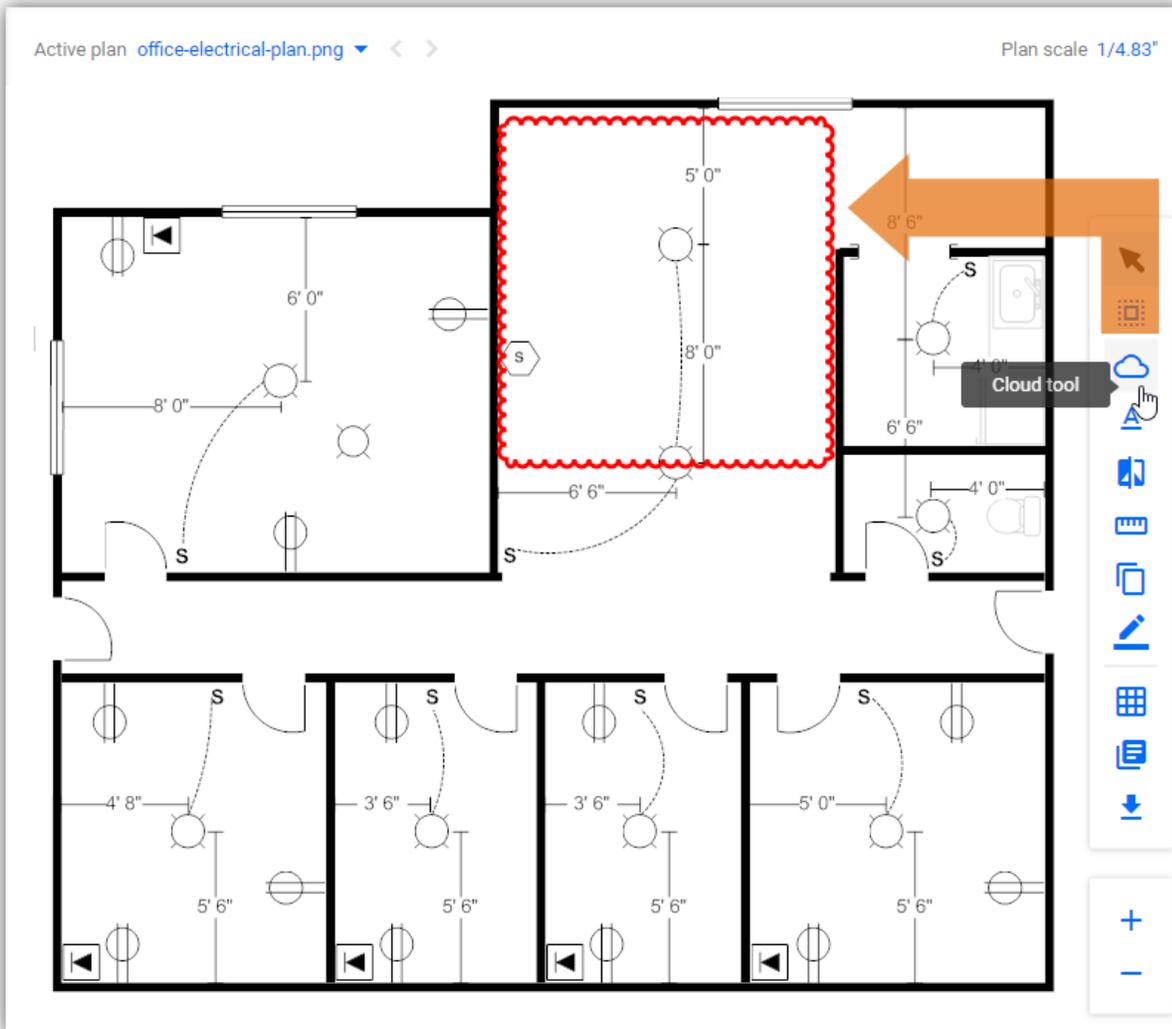
Multiselect Tool

The Multiselect Tool is a selection tool that lets you select multiple items from the plan. When these items are selected, you can edit the items which allow you to move, delete, or group selected items.



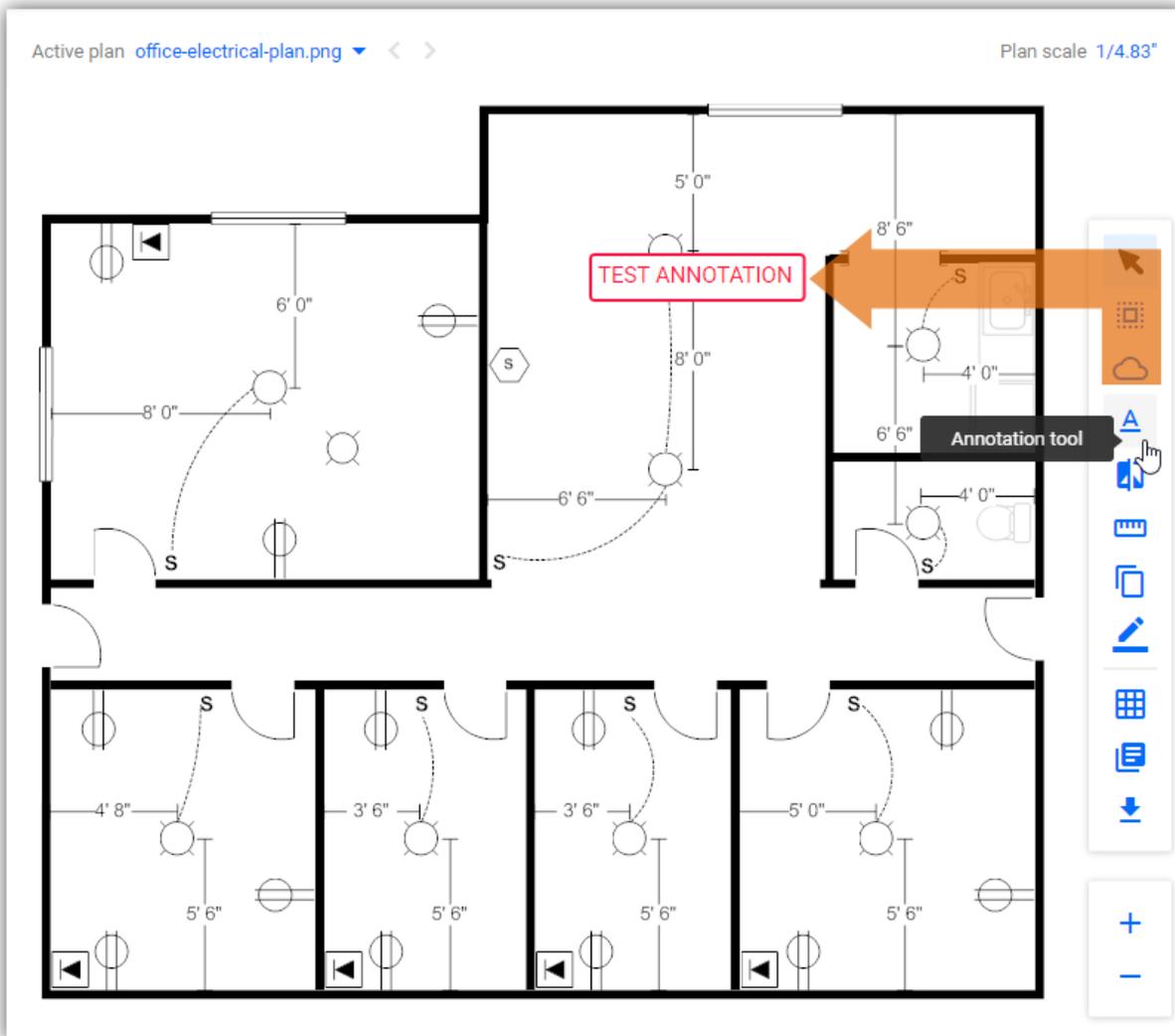
Cloud Tool

The Cloud Tool lets you add call outs on a section/area of the plan. This comes in handy when you want to add notes, descriptions, feedback, and suggestions to your clients. This tool best works with the Annotation Tool enabling you to add characters to the call outs.



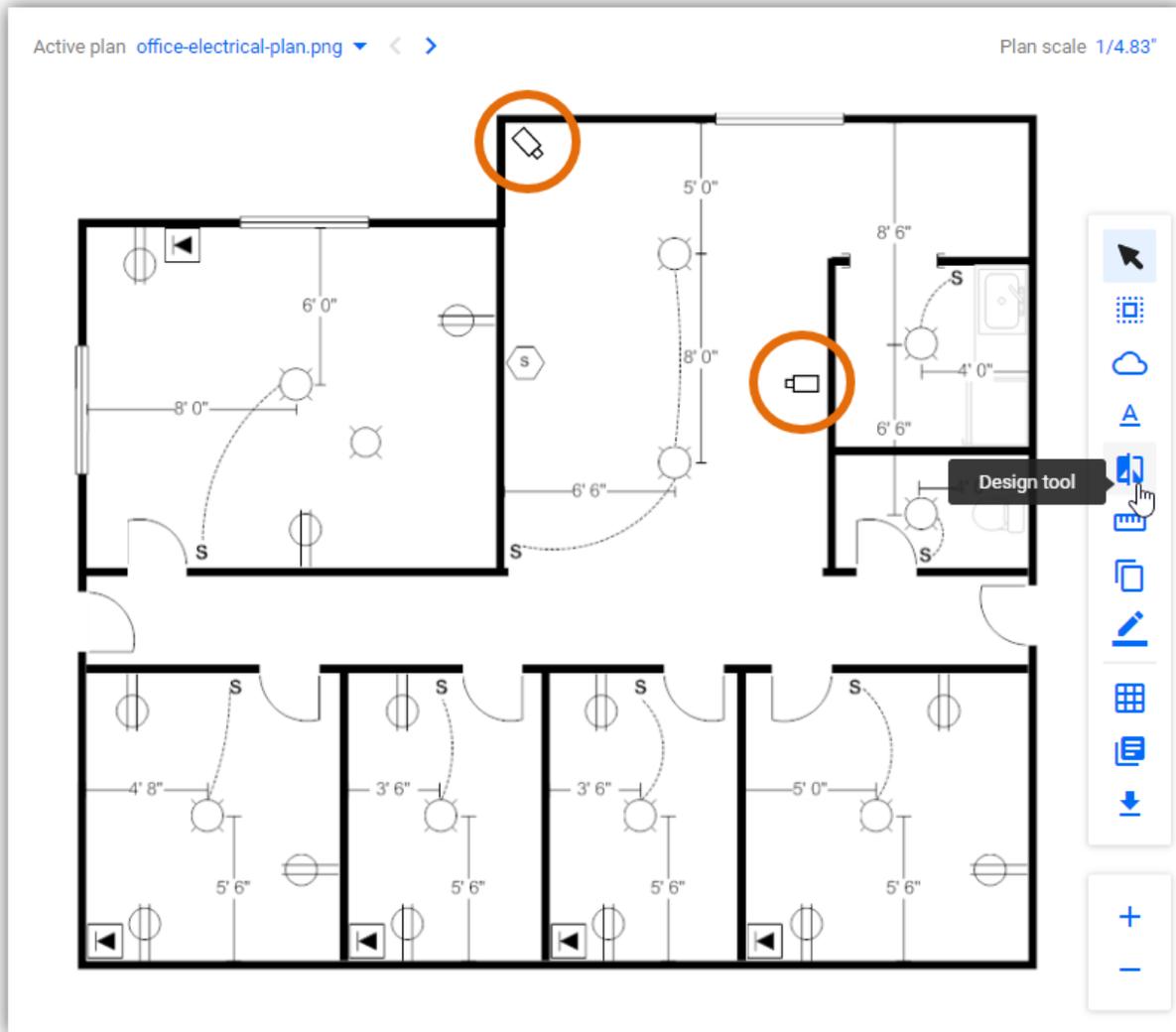
Annotation Tool

The Annotation Tool lets you create annotations, labels, notes, descriptions, suggestions, and feedback on materials or areas of the plan. This tool best works with the Cloud Tool.



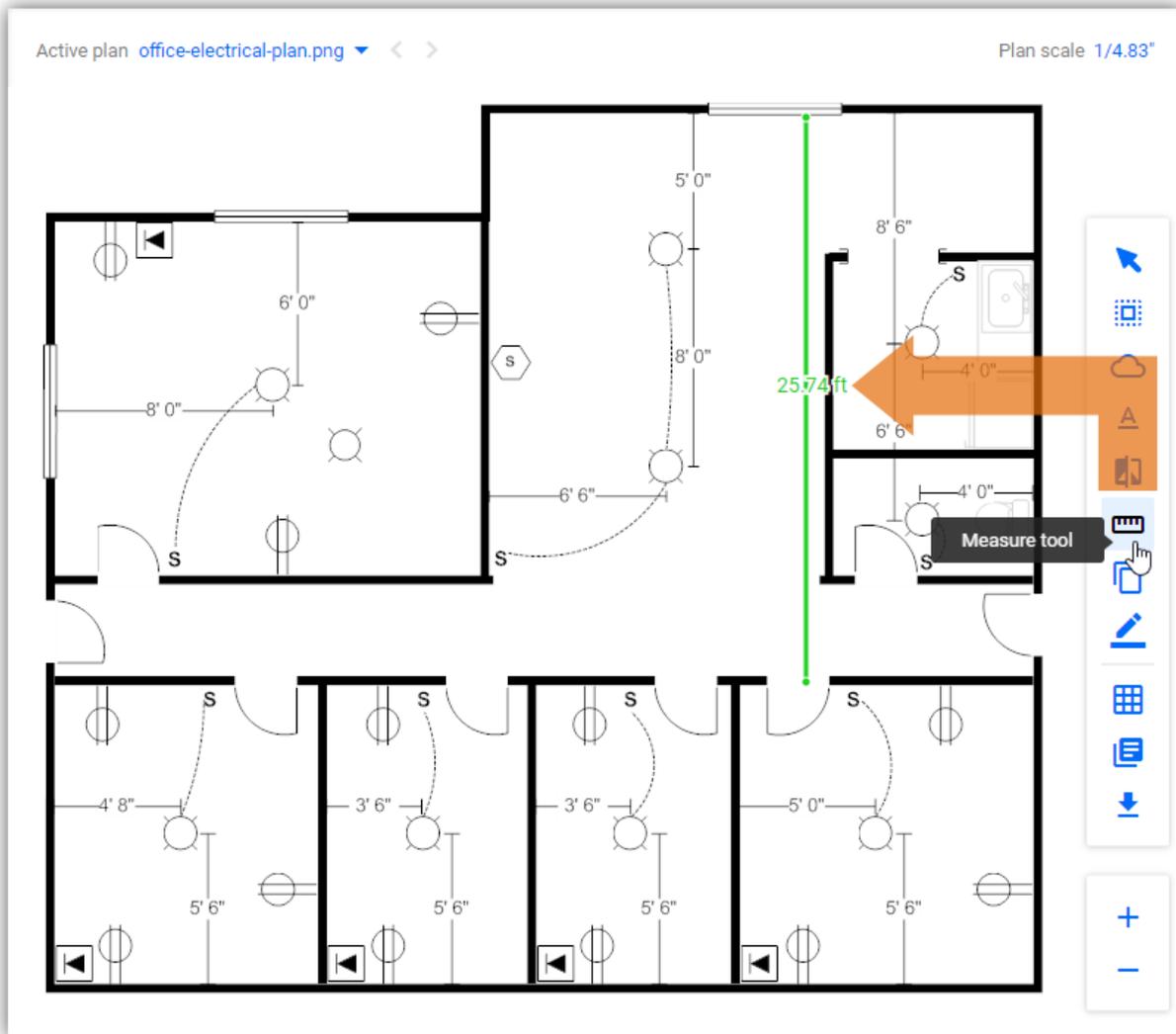
Design Tool

The Design Tool lets you add more designs to existing plans. This is a powerful tool that enables you to add missing materials or client requested materials to a plan. (e.g. Security Installer needs to add security cameras to a plan). The tool offers a wide variety of designs you can choose from and is dedicated to each trade.



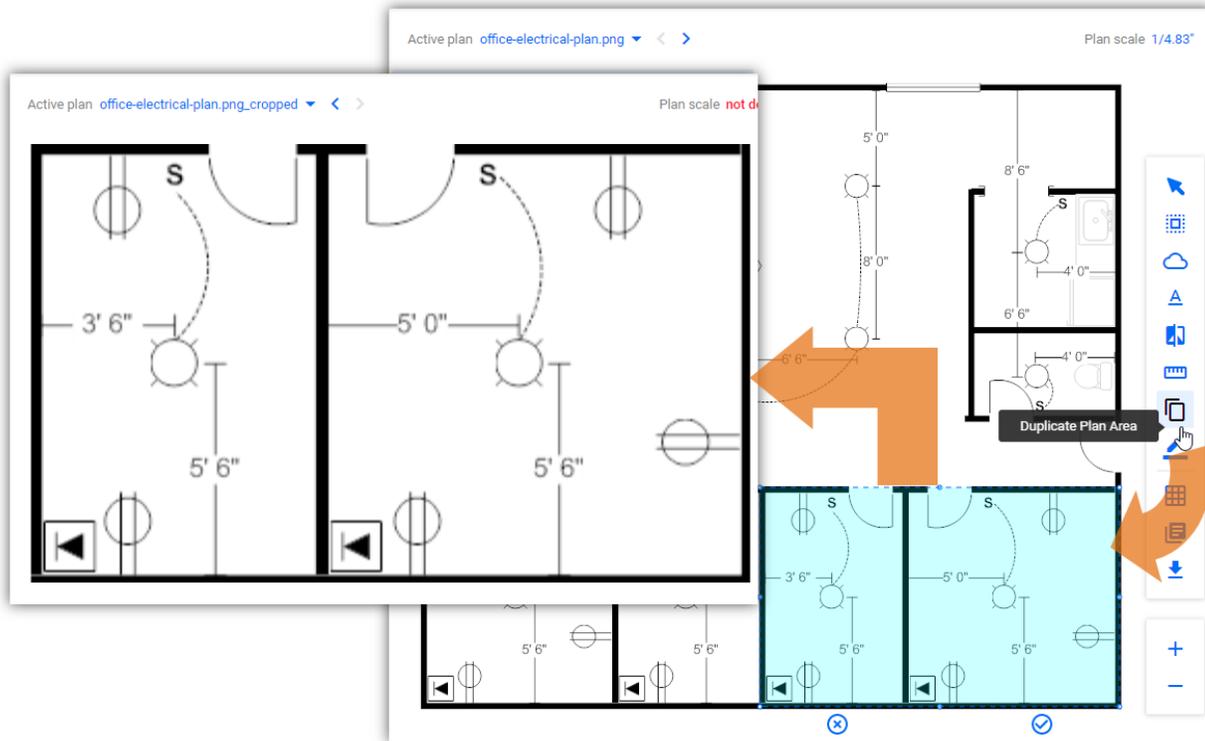
Measure Tool

The Measure Tool lets you measure distance based on the plan scale. Using this tool will generate the actual distance of the measured area.



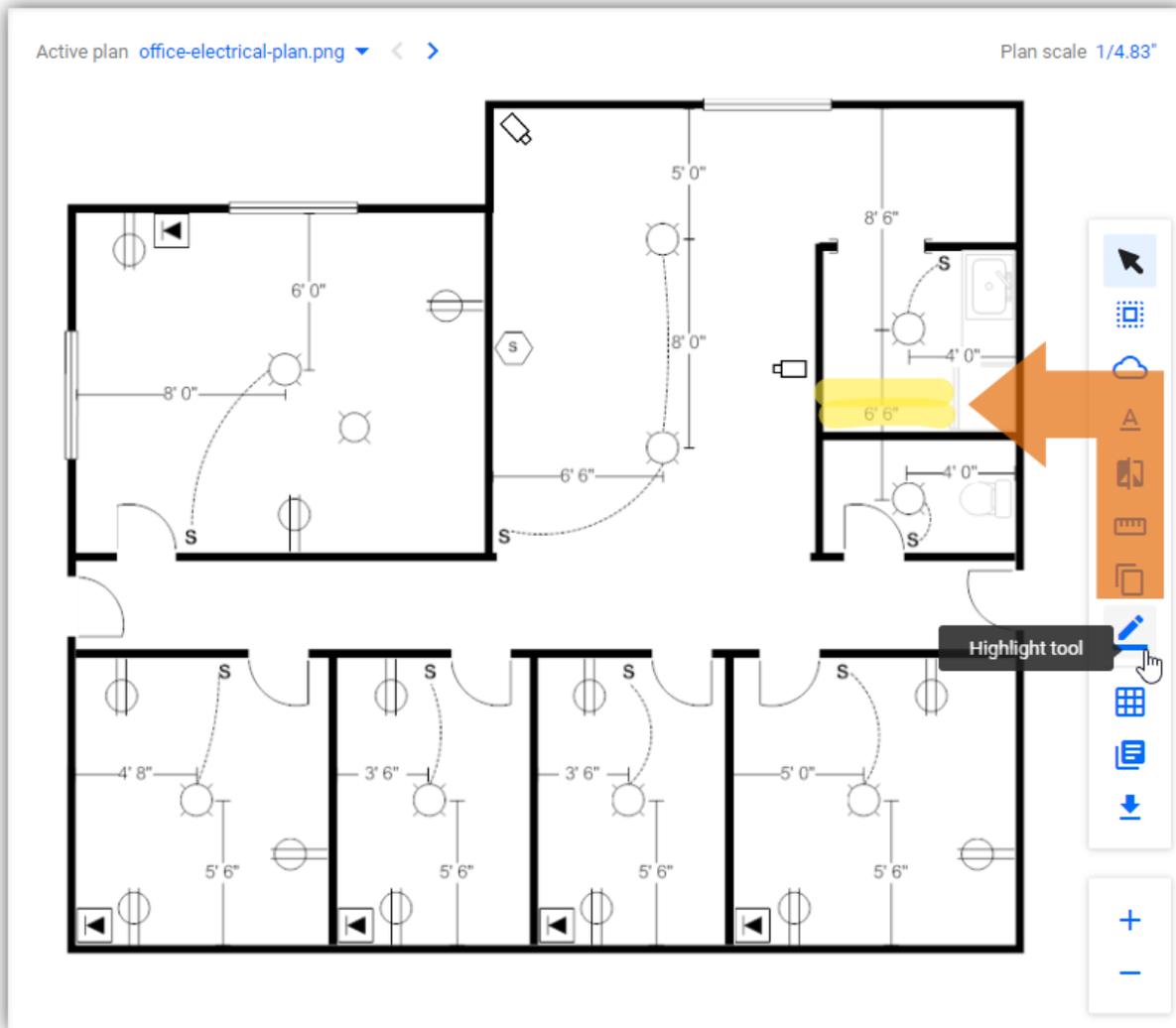
Duplicate Plan Area

The Duplicate Plan Area tool lets you duplicate the selected area of the plan. After confirming the selection, a new plan will be created.



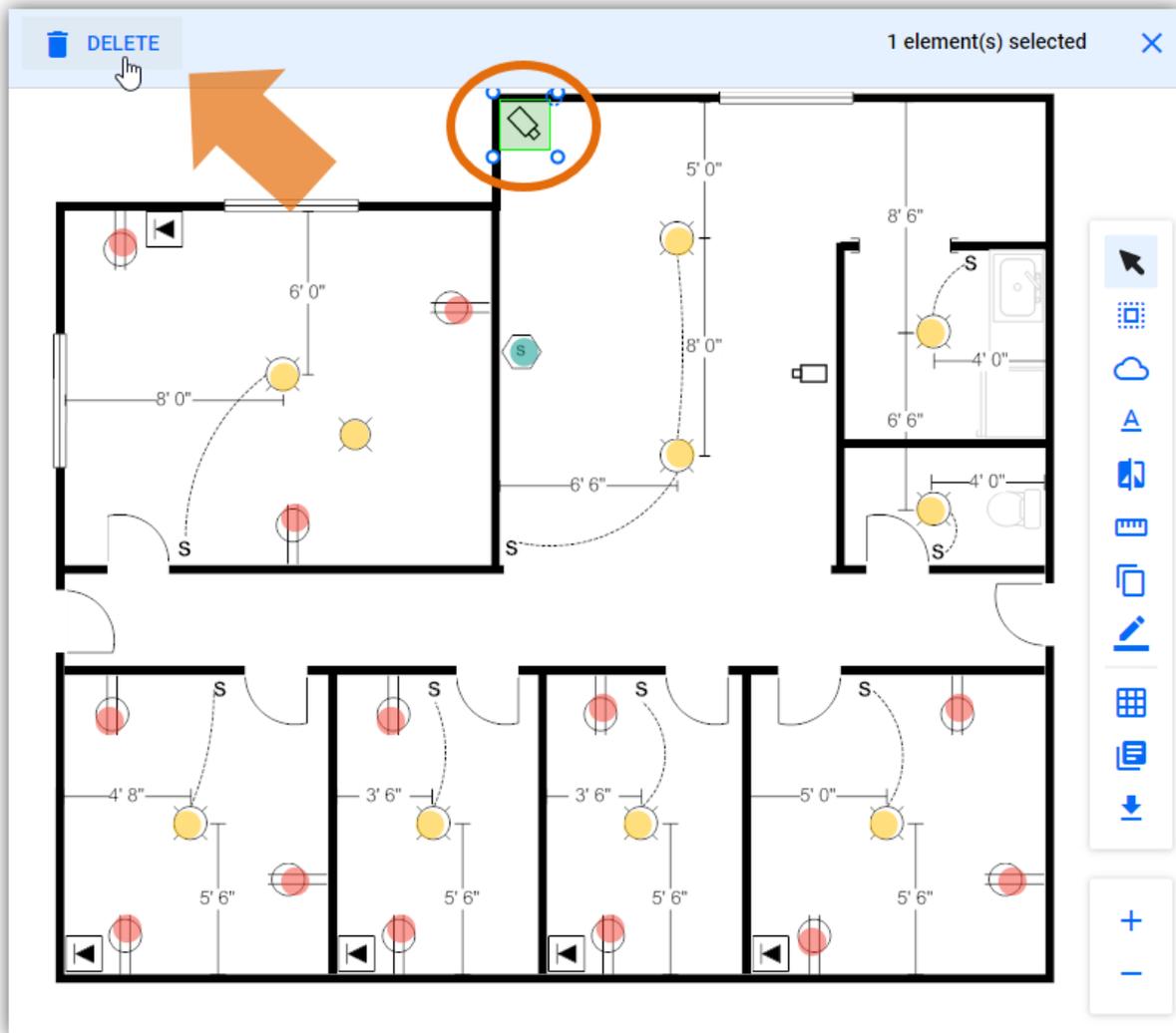
Highlight Tool

The Highlight tool lets you highlight the area of the plan. Simply point and click on the area that you want to highlight, and drag it to complete.



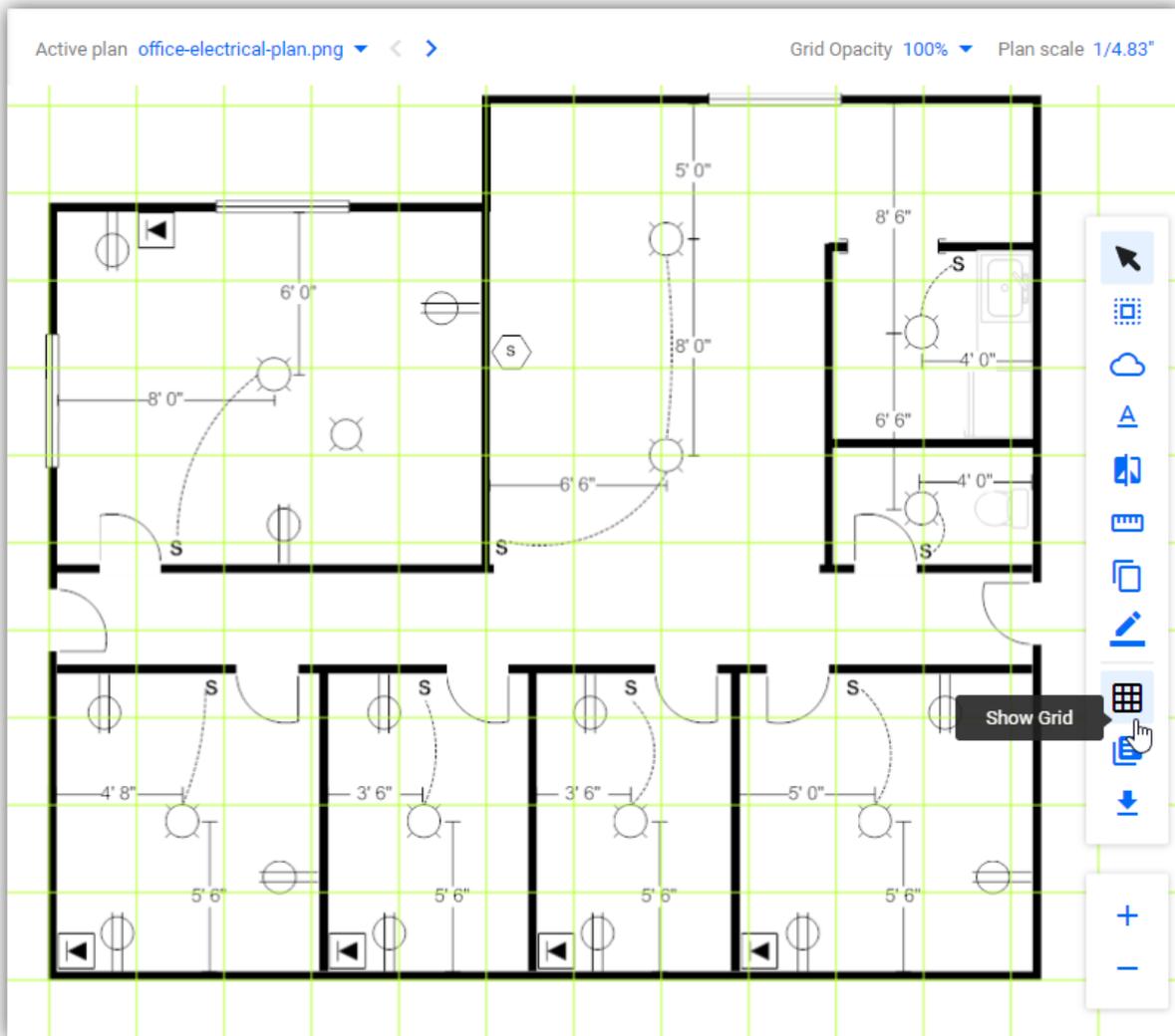
Delete Tool

The Delete tool lets you delete selected items/materials on the plan. First, select the item/material using the Arrow tool for a single item or the Multiselect tool for multiple items then click this tool to continue deleting the item(s).



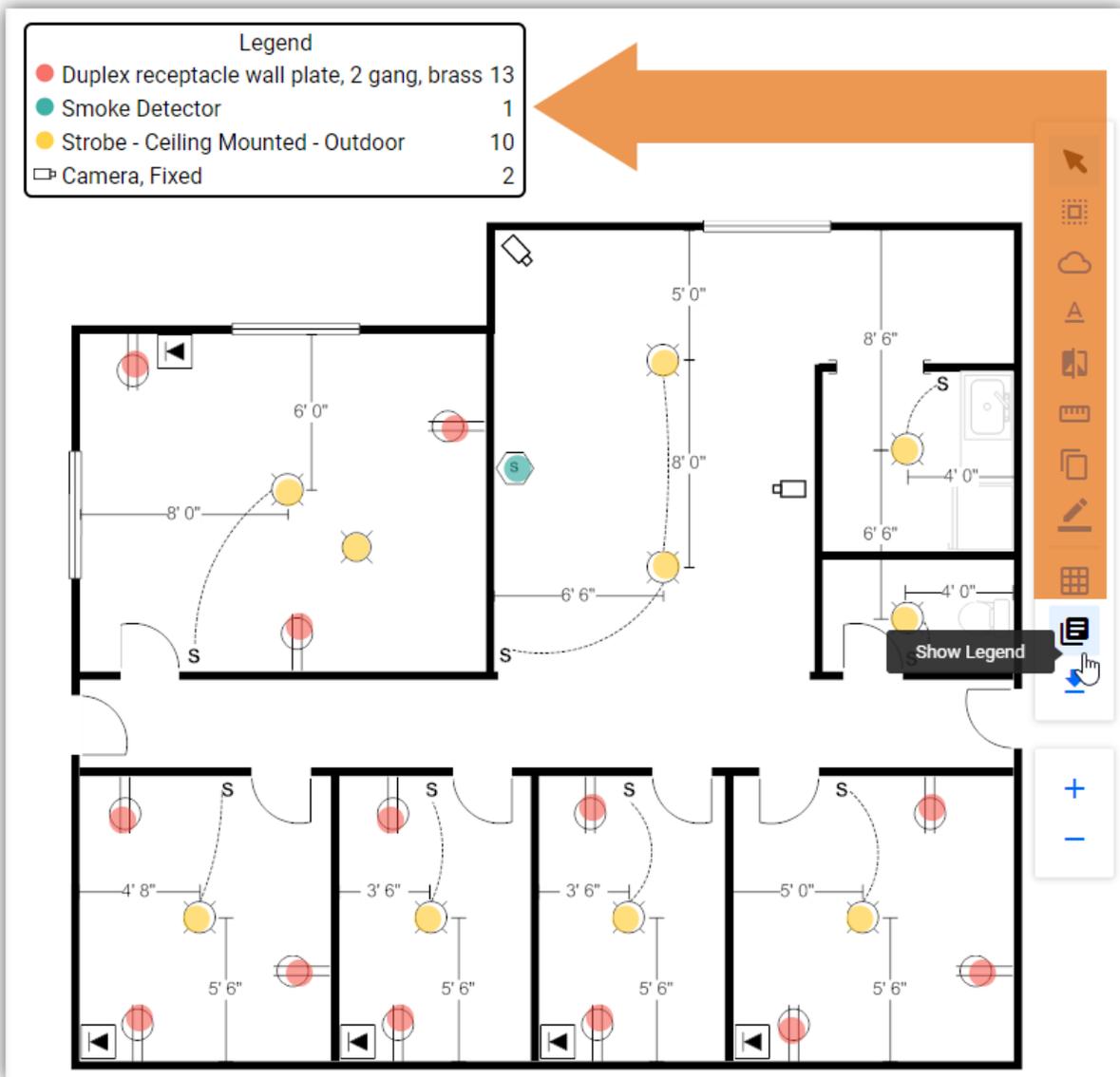
Show Grid

The Show Grid tool lets you add overlaid grids to the plan. The specialized grids are customizable depending on the needs of the client. This tool comes in handy for fire safety planning as it makes adding fire sprinklers and other related materials easily.



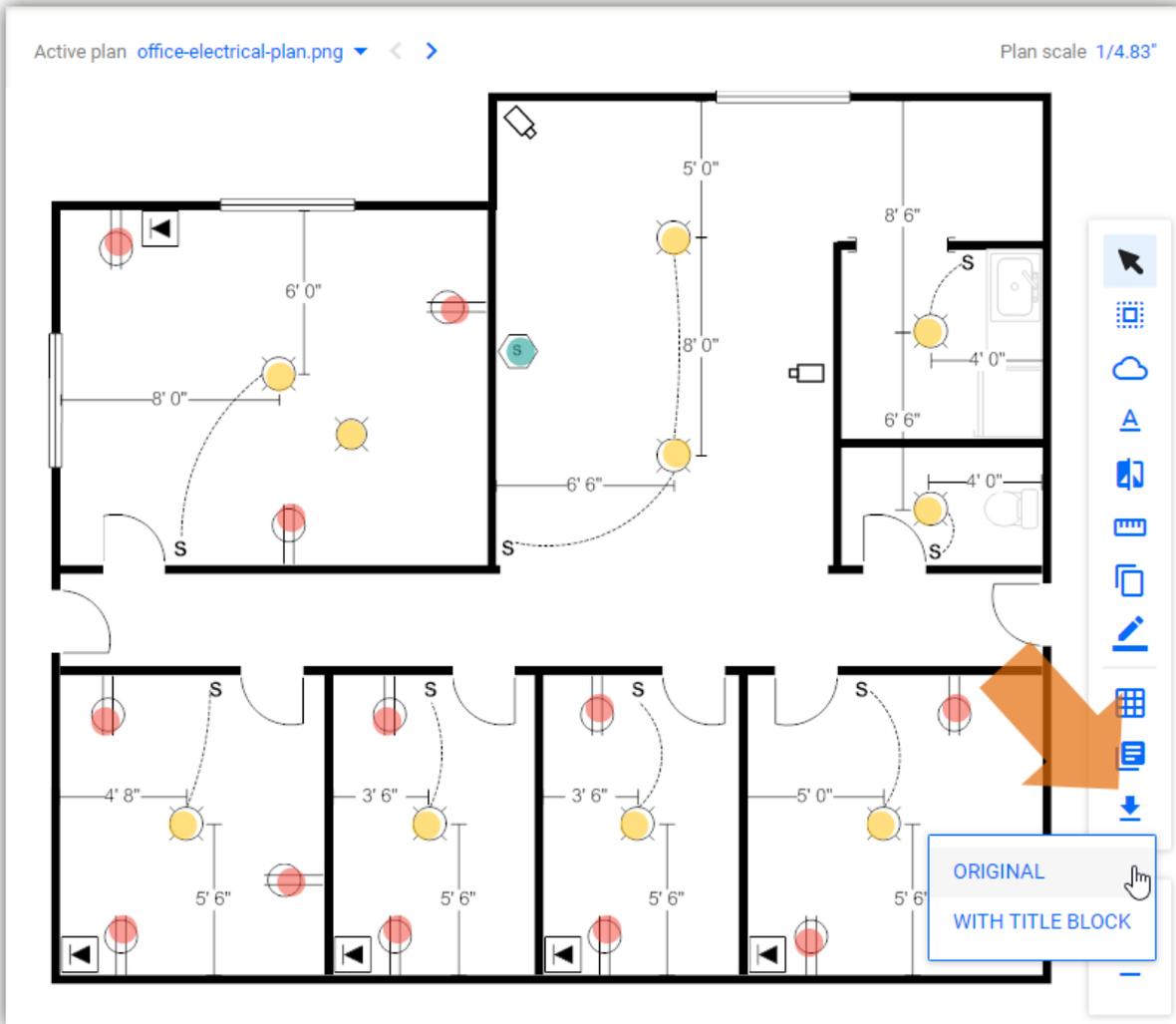
Show Legend

The Show Legend tool lets you a Legend to the plan indicating the material name and the individual count of each material.



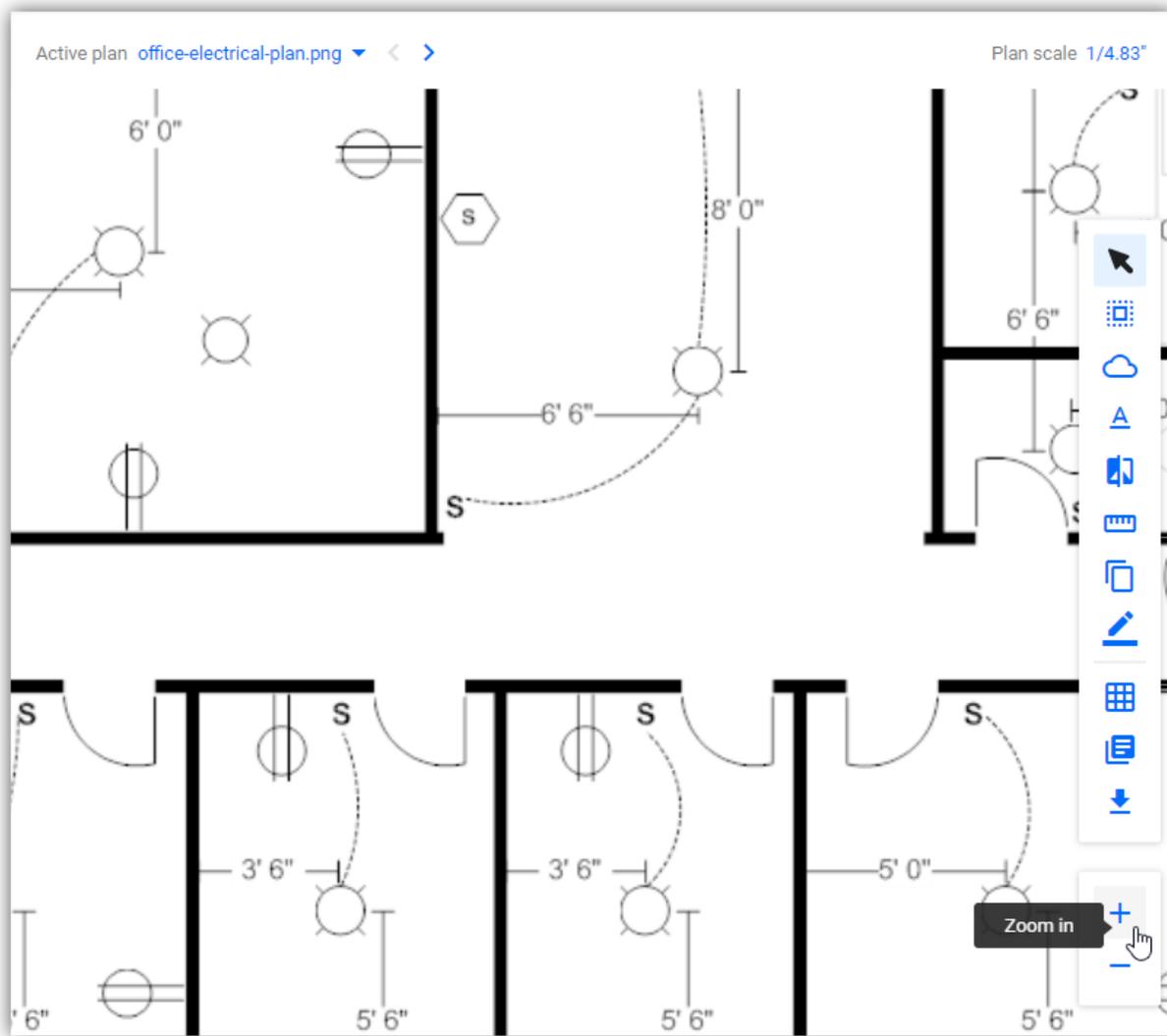
Download PDF

The Download PDF tool lets you download the active take-off. You can download the original take-off or with the title blocks.



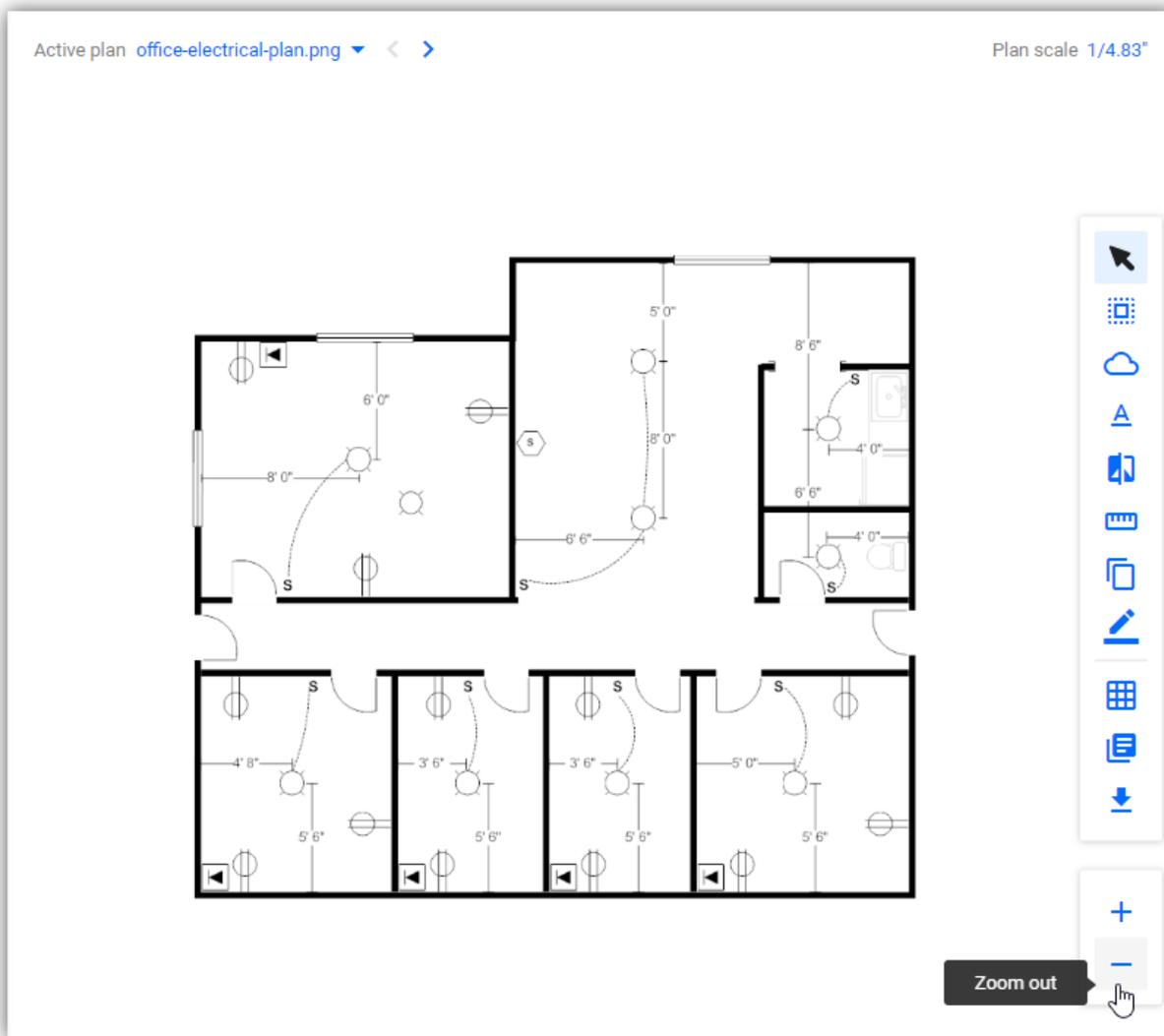
Zoom In

The Zoom In tool lets you zoom in the display by using the Mouse-scroll to zoom in.



Zoom Out

The Zoom Out tool lets you zoom out the display by using the Mouse-scroll to zoom out.



Bid Estimate

After completing the Take-Off process, you can now view and define the project bid estimate. The Estimating tab is consists of three (3) sections:

- [Project Estimate](#)
- [Additional Notes](#)
- [Summary](#)

Each section displays the appropriate elements of the project’s bidding estimates ranging from material quantity and costs, labor and labor costs, inclusions and exclusions, and the overall bid summary.

Project Estimate

When accessing the Estimating tab, the first thing that you will see is the Project Estimate section. This section displays the parts grouping and individual parts.

Catalog	Quantity	Material Cost	Total Cost	Labor	Total labor
Form and pour concrete pad	848.07 cu ft	\$ 8.77	\$ 7,437.55	93.60 mins	1,322.98 hrs
Duplex receptacle wall plate, 2 gang, brass	13 ea	\$ 8.98	\$ 116.74	6.00 mins	1.30 hrs
#2 Type THHN-THWN 600 Volt 90 Degree Stranded Aluminum Wire	55.44 ft	\$ 0.71	\$ 39.25	0.66 mins	0.61 hrs
Subtotal			\$ 7,593.54		1,324.89 hrs

Each group has a list of catalog showing its Quantity, Material Costs, and Labor. These are columns under the groups wherein you can define the values per item, quantity, material costs, and labor so the system can calculate it and generate it under the Total Cost and Total Labor columns.

Lastly, the Project Estimate Menu enables you to switch from the default mode to the following modes:

- Power –User mode
- Group Multiplier
- Individual Labor Rates

You can also export estimates to Excel and PDF, export bill of materials to Excel and import bill of materials pricing from Excel.

Groups

During the take-off procedure, all the catalogs that have been added will appear under the Project Estimate section and categorized by groups. If you have not created a group, all the catalogs will appear under the Default Group.

Catalog	Quantity	Material Cost	Total Cost	Labor	Total labor
Form and pour concrete pad Form and pour concrete pad	848.07 cu ft	\$ 8.77	\$ 7,437.55	93.60 mins	1,322.98 hrs
Duplex receptacle wall plate, 2 gang, brass Duplex receptacle wall plate, 2 gang, brass	13 ea	\$ 8.98	\$ 116.74	6.00 mins	1.30 hrs
#2 Type THHN-THWN 600 Volt 90 Degree Stranded Aluminum Wire #2 Type THHN-THWN 600 Volt 90 Degree Stranded Aluminum Wire	55.44 ft	\$ 0.71	\$ 39.25	0.66 mins	0.61 hrs
Subtotal			\$ 7,593.54		1,324.89 hrs

To change the material quantity, find and click the **Quantity** column and update the material’s quantity.

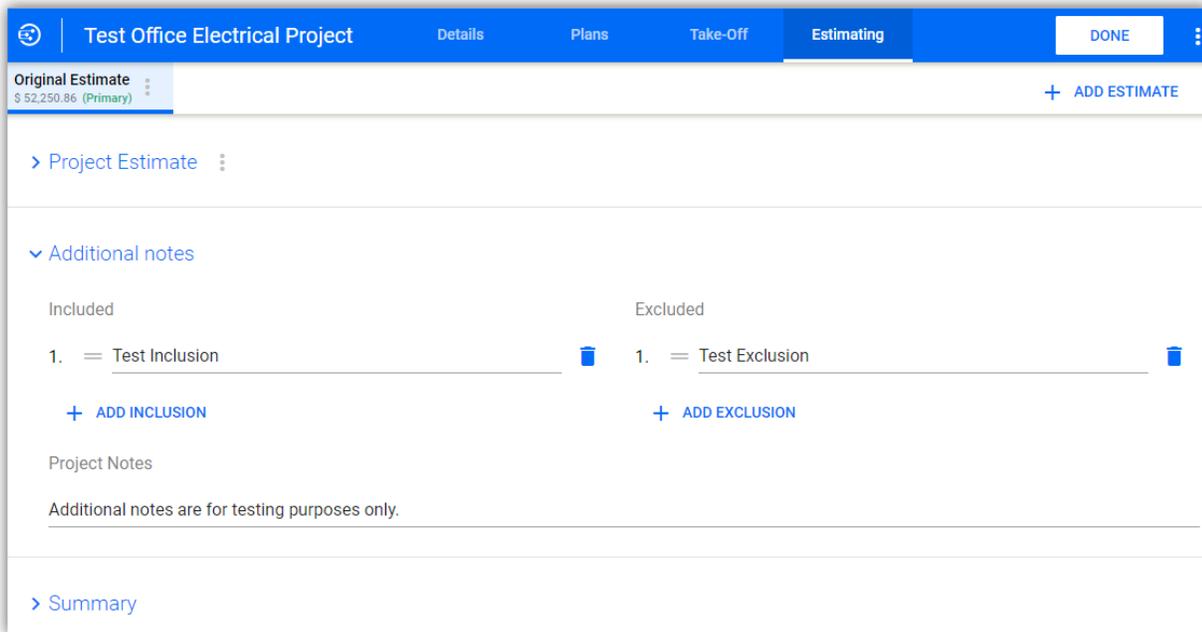
To change the material costs, find and click the **Material Cost** column and update the material’s cost.

To update the labor duration, find and click the **Labor** column and update the appropriate labor duration.

Note: you can update the values that are colored blue.

Additional Notes

The Additional notes section of the Estimating tab enables you to add [inclusions](#), [exclusions](#), and [project notes](#).



The Inclusions, Exclusions, and Project Notes fields let you add more notes, tasks or exclusions on the that will appear directly in the generated project bid (PDF).

Summary

The Summary section of the Estimating tab displays the summary of all labor and material costs, taxes, and other miscellaneous adjustments (e.g. Overhead, lost time, waste, discount). In this section, you can adjust the labor costs and the profit margin.

Test Office Electrical Project					
		Details	Plans	Take-Off	Estimating
DONE					
Additional notes					
Summary					
		Labor Cost	25 \$/hr	Labor Sales Rate	31.25 \$/hr
Labor and Materials	Total Labor	Total Cost	Profit Margin	Total Sales	Profit
Labor	1,324.89 hrs	\$ 33,122.36	20 %	\$ 41,402.95	\$ 8,280.59
Materials		\$ 7,593.54	30 %	\$ 10,847.91	\$ 3,254.37
Subtotal		\$ 40,715.90	22.08 %	\$ 52,250.86	\$ 11,534.96
Additional Adjustments		Taxes ⓘ	Others	Total	
Overhead	0 % ~ \$ 0.00	Labor Tax	Bonding	\$ 52,250.86	
Lost Time	0 % ~ \$ 0.00	Materials Tax	0 % ~ \$ 0.00		
Waste	0 % ~ \$ 0.00				
Discount %	0 % ~ -\$ 0.00				
Total Adjustments	\$ 0.00	Total Taxes	Total Others		

To update the labor costs and profit margins, simply find the appropriate columns (i.e. Labor Cost and Profit Margin), click the value(s) in Blue and enter the updated value.

The image shows two screenshots of the Esticom software interface for a project named 'Test Office Electrical Project'. The top screenshot shows the 'Summary' section with 'Labor Cost' set to 25 \$/hr and 'Labor Sales Rate' at 31.25 \$/hr. An orange box highlights the 'Labor Cost' value, and a mouse cursor is shown clicking it. A large orange arrow points down to the second screenshot, which shows the 'Labor Cost' updated to 30 \$/hr. Below this, a table displays the project's financial summary.

Labor and Materials	Total Labor	Total Cost	Profit Margin	Total Sales	Profit
Labor	1,324.89 hrs	\$ 33,122.36	20 %	\$ 41,402.95	\$ 8,280.59
Materials		\$ 7,593.54	30 %	\$ 10,847.91	\$ 3,254.37
Subtotal		\$ 40,715.90	22.08 %	\$ 52,250.86	\$ 11,534.96

Generate Bid

After working on the take-off and reviewing the project estimate, you can generate the bid and download its PDF version.

1. Go to the **Estimating** tab's **Summary** section.
 - a. **Note:** ensure to review all three (3) sections before generating the bid.

Test Office Electrical Project					
		Details	Plans	Take-Off	Estimating
Additional notes					
Summary					
		Labor Cost	25 \$/hr	Labor Sales Rate	33.33 \$/hr
Labor and Materials	Total Labor	Total Cost	Profit Margin	Total Sales	
Labor	1,324.89 hrs	\$ 33,122.36	25 %	\$ 44,163.15	
Materials		\$ 7,593.54	30 %	\$ 10,847.91	
Subtotal		\$ 40,715.90	25.99 %	\$ 55,011.06	

2. Find and click the **SHOW BID** button.
 - a. A **Preview** of the bid will be generated.

Additional Adjustments	Taxes	Others	Total
Overhead 0% ~ \$ 0.00	Labor Tax 0% ~ \$ 0.00	Bonding 0% ~ \$ 0.00	\$ 55,011.06
Lost Time 0% ~ \$ 0.00	Materials Tax 0% ~ \$ 0.00		
Waste 0% ~ \$ 0.00			
Discount % 0% ~ \$ 0.00			
Total Adjustments \$ 0.00	Total Taxes \$ 0.00	Total Others \$ 0.00	

[SHOW BID](#)

Logo Missing Quote: 1010 / Date: 8/15/2019

Customer

Test

Prepared By:
Joseph 947
go@gmail.com

Thor Electrical Services
123 New Asgard
New York, New York
10001, United States

Thor Odinson
11234567890
thodinson@tes.com

Project: Test Office Electrical Project

Default Group	Part	Quantity	Material Cost	Labor Cost	Total Cost
	Form and pour concrete pad	848.07 cu ft	\$ 12.53	\$ 52.00	\$ 54,724.55
	Duplex receptacle wall plate, 2 gang, brass	13 ea	\$ 12.83	\$ 3.33	\$ 210.10
	#2 Type THHN-THWN 600 Volt 90 Degree Stranded Aluminum Wire	55.44 ft	\$ 1.01	\$ 0.37	\$ 76.40

3. Scroll down and find the **EXPORT BID** panel.
 - a. **Note:** before exporting the **PDF** of the bid, review the options that you want to be included or excluded in the bid.

Summary	
Price	
Labor and Adjustments	\$ 44,163.15
Materials	\$ 10,847.91
Subtotal	\$ 55,011.06
Taxes	
Labor and Adjustments Tax	\$ 0.00
Materials Tax	\$ 0.00
Total Taxes	\$ 0.00
Total	
\$ 55,011.06	
Accepted By	Date
.....	

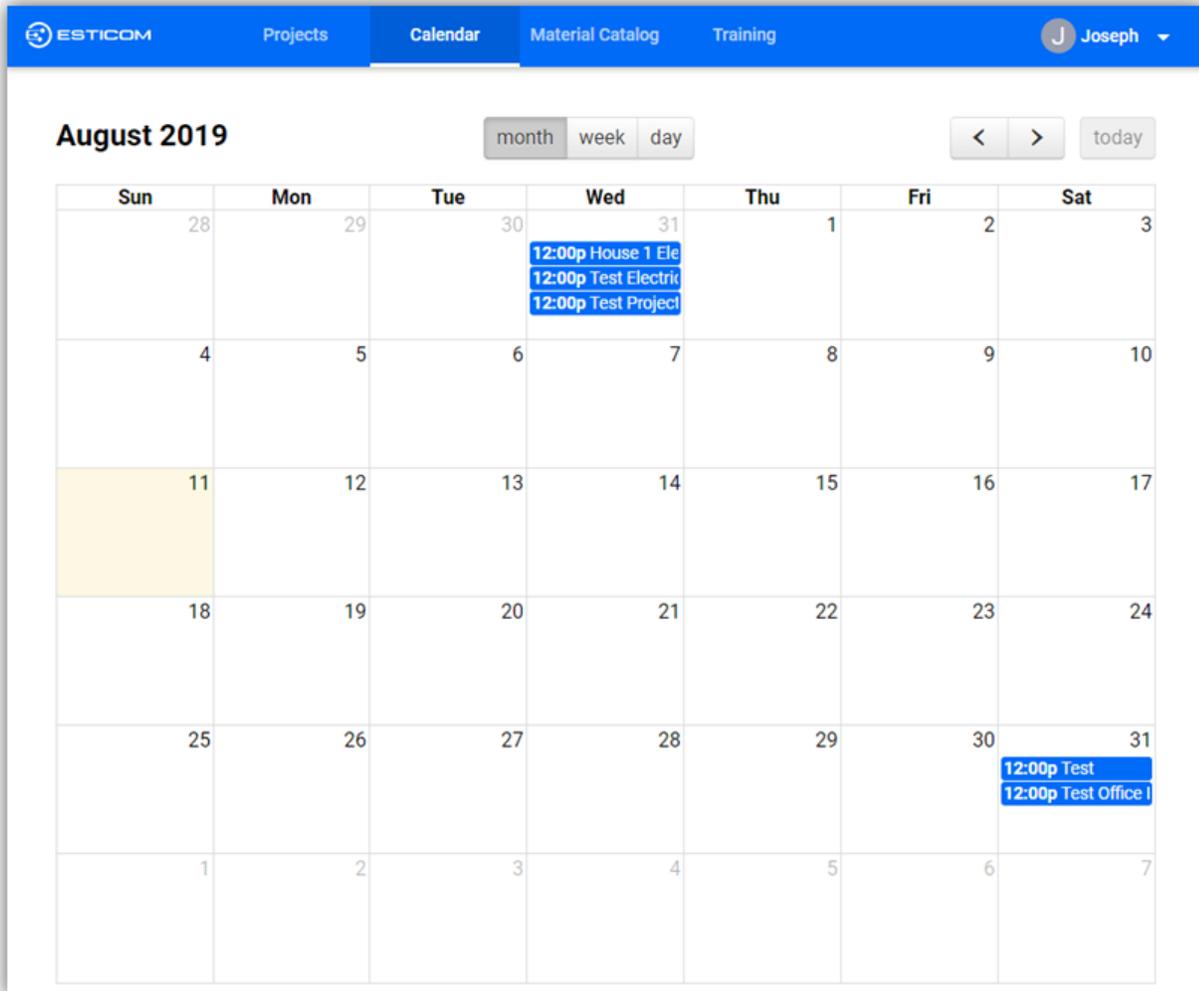
Values displayed may be rounded to two decimal places

<input checked="" type="checkbox"/> Show Quantity	<input checked="" type="checkbox"/> Show Taxes	<input type="checkbox"/> Round Bid Total
<input checked="" type="checkbox"/> Show Price	<input type="checkbox"/> Show Groups Only	 <input type="button" value="EXPORT BID"/>
<input type="checkbox"/> Show Combined Unit Cost	<input type="checkbox"/> Group By Plan	
<input checked="" type="checkbox"/> Show Labor and Materials	<input type="checkbox"/> Show Lump Sum	

4. After reviewing the options, click **EXPORT BID**.
 - a. A PDF of the bid will be downloaded to your device.

Calendar

The Calendar Feature lets you track projects by month, week, or day. This feature is easy to navigate due to its straightforward interface.



In addition, you can directly open a project from the Calendar. Simply find the due date of the project and click the project name (link). This will direct you to the Projects tab with the selected project opened.

Material Catalog

The Material Catalog houses all the material information and values ranging from individual parts to assembled items. Esticom offers a gallery of predefined materials that you can use. You can also add and customize parts/assembly using this feature. In addition, you can quickly access these materials during take-off.

Adding Parts/Assembly

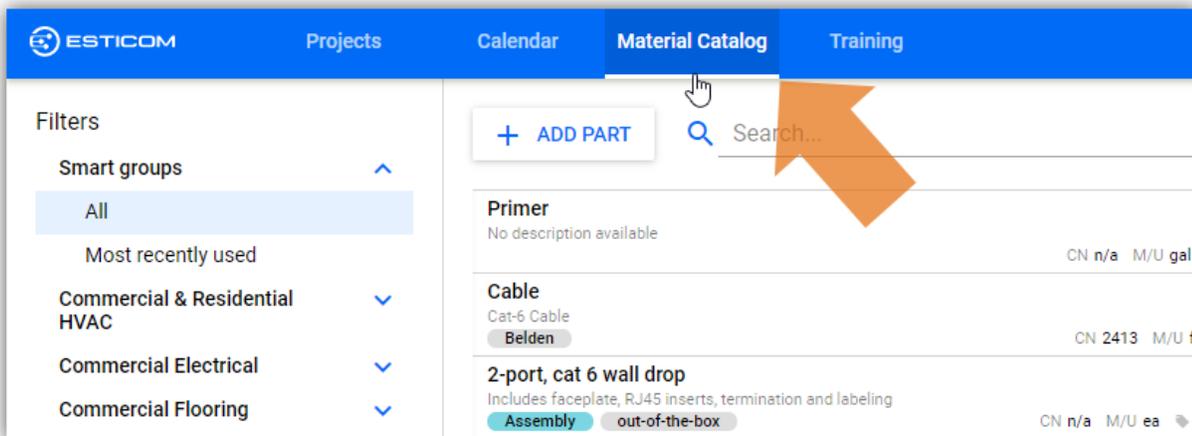
In this quick start guide, we demonstrate the basic operations under the Material Catalog tab such as:

- [Adding Parts](#)
- [Creating an Assembly](#)

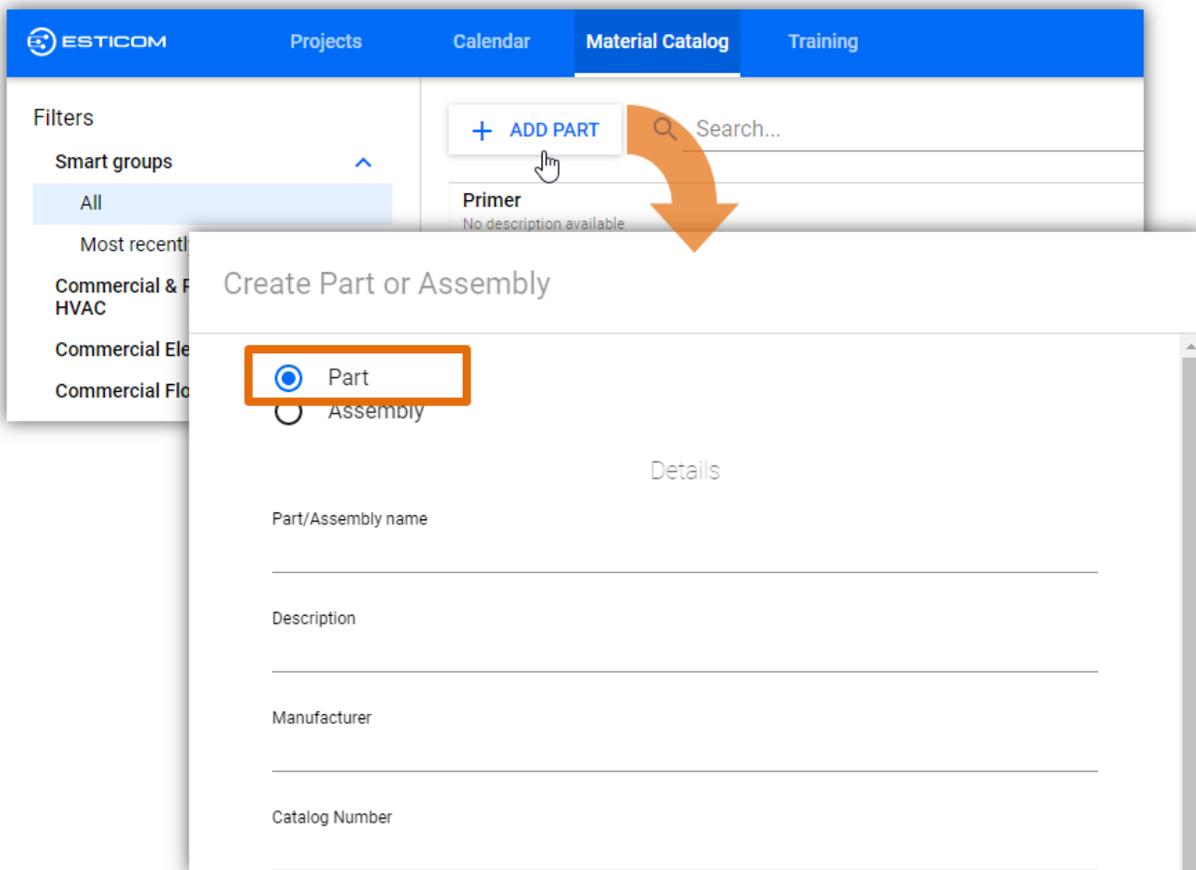
Add Parts

This operation lets you add individual parts to the material catalog.

1. On the **Module Menu**, click **Material Catalog**.
 - a. The **Material Catalog** tab opens.



2. Click the **+ADD PART** button.
 - a. The **Create Part or Assembly** window appears.



3. By default, the **Part** radio button is selected. Ensure that this option is selected.

4. Specify the **Part** details:

Create Part or Assembly

Part
 Assembly

Details

Part/Assembly name
Duplex Wire [Test]

Description
Duplex Wire for Testing

Manufacturer
DW Testing Corp

Catalog Number
0001-A

Phase Code
PC001A

Cost Code
CC001A

Unit of Measure	Material cost	Labor rate (mins)	↔
ft	1	10	

Catalog to include this material in
Custom

➔
CANCEL
SAVE

Field	Instructions
Part/Assembly Name	Enter the part or material name.
Description	Enter the part or material description.
Manufacturer	Enter the Manufacturer name if necessary.
Catalog Number	Enter the part's catalog number.
Phase Code	Enter the part's phase code.
Cost Code	Enter the part's cost code.

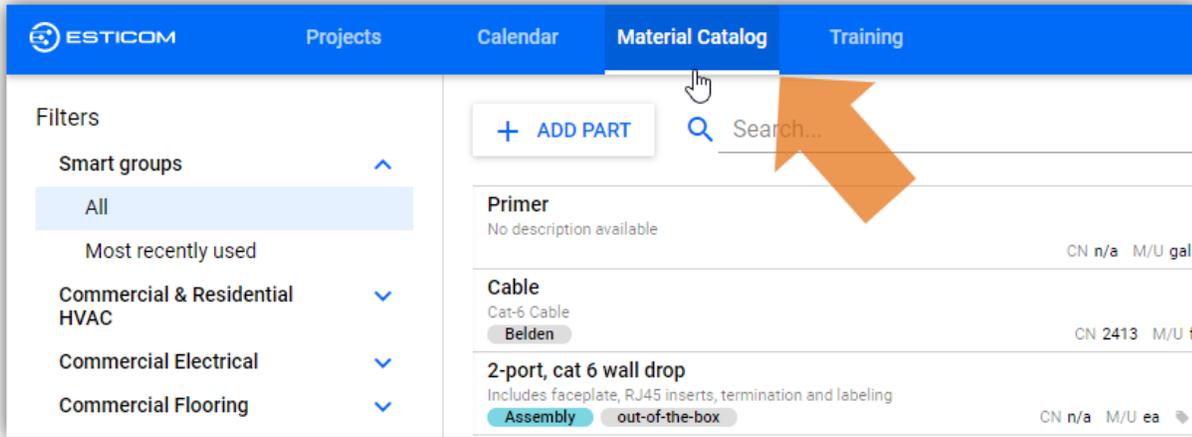
Unit of Measure	Click the drop-down arrow to select the part's appropriate unit of measurement.
Material Cost	Enter the part/material cost.
Labor rate (mins)	Enter the part/material installation labor rate in minutes or you can toggle it into hours by clicking the Toggle icon.
Catalog to include this material in	Click the drop-down arrow to select a catalog where you want this material to include in. Note: you can add this material to a new catalog clicking the New Catalog link.

5. Review the specified details before saving the part.
6. Click **SAVE** to create the part.

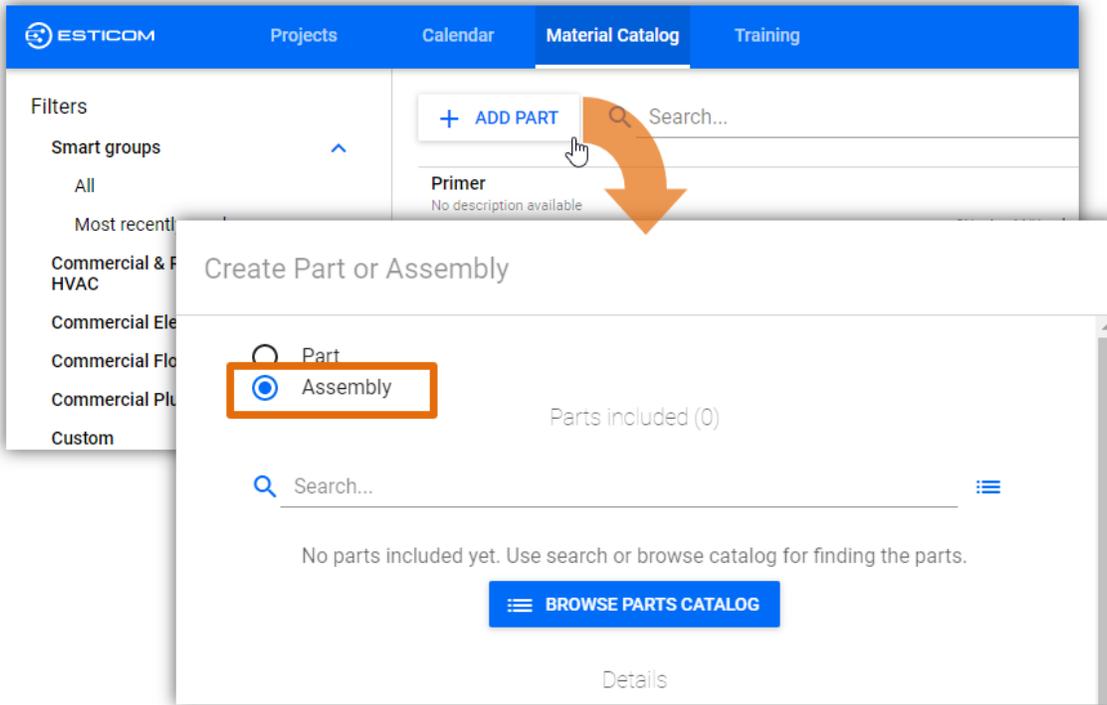
Create Assembly

This operation lets you create an assembly using the existing parts.

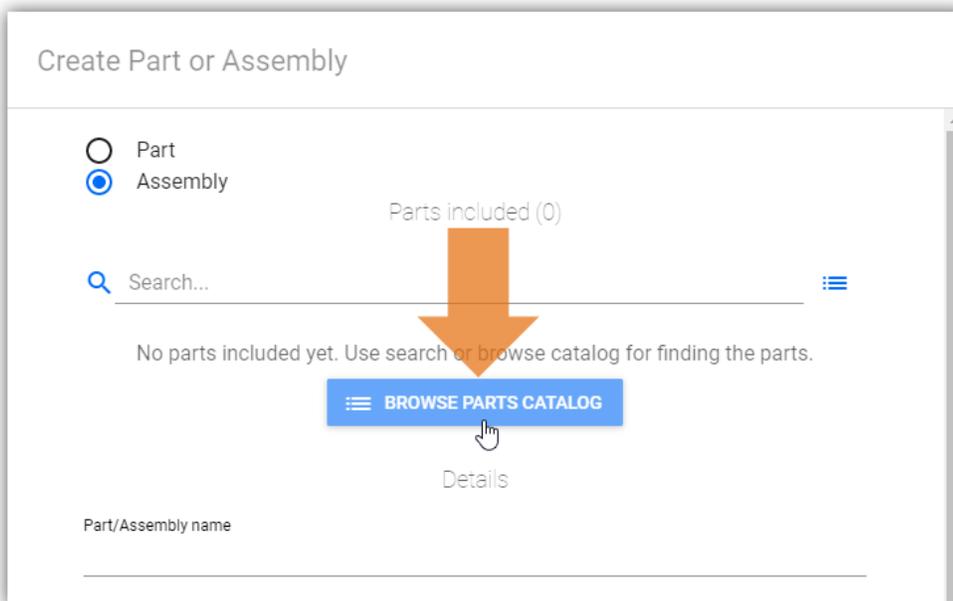
1. On the **Module Menu**, click **Material Catalog**.
 - a. The **Material Catalog** tab opens.



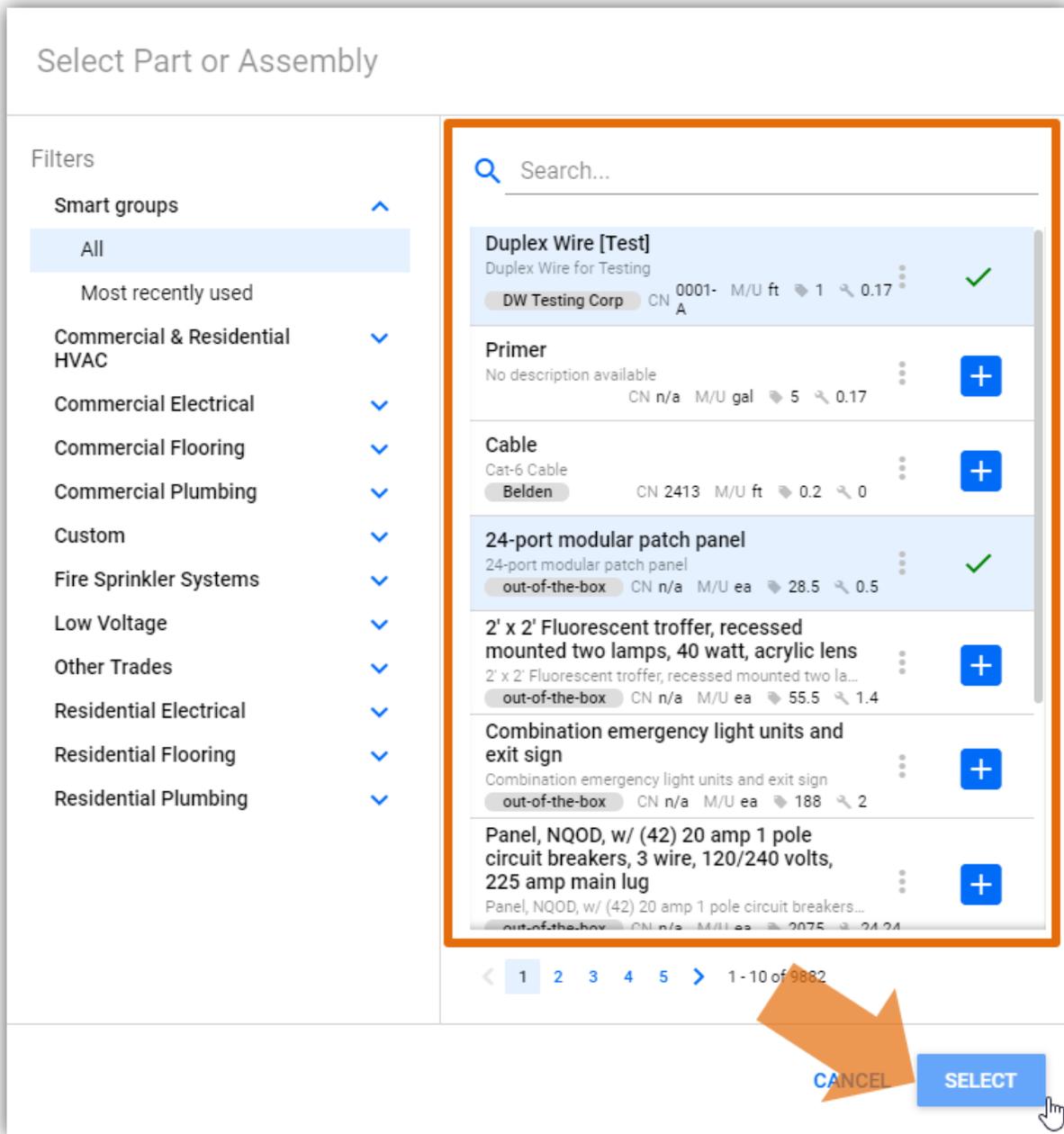
2. Click the **+ADD PART** button.
 - a. The **Create Part or Assembly** window appears.



3. Select the **Assembly** radio button.
4. Start assembling the parts by searching and selecting individual part names. Use the **Search** field or click the **BROWSE PARTS CATALOG** button. In this example, we clicked the **BROWSE PARTS CATALOG** button.
 - a. The **Select Part or Assembly** window opens.



5. To maximize your search, use the **Filters** panel by selecting the appropriate **Trade** and **Parts Category**.
6. In the **Parts List** panel on the right, click the **Plus (+)** icon to start adding the parts.
 - a. **Note:** to remove selected parts, click the **X** icon.



7. After selecting the parts, click **SELECT**.

- Specify the number of materials by clicking the field beside the **Part** name and enter the appropriate value.

The screenshot shows the 'Create Part or Assembly' window. At the top, there are radio buttons for 'Part' and 'Assembly', with 'Assembly' selected. Below this, it says 'Parts included (2)'. There is a search bar with a magnifying glass icon and the text 'Search...'. A list of two parts is shown, enclosed in an orange border. Each part has a quantity field with the number '1', a part name, a description, a manufacturer name in a grey box, a part number, a unit, a quantity, a weight, and a delete icon (an 'X').

Quantity	Part Name	Description	Manufacturer	Part Number	Unit	Quantity	Weight	Action
1	Duplex Wire [Test]	Duplex Wire for Testing	DW Testing Corp	CN 0001-A	M/U ft	1	0.17	X
1	24-port modular patch panel	24-port modular patch panel	out-of-the-box	CN n/a	M/U ea	28.5	0.5	X

Below the list, there is a 'Details' section and a 'Part/Assembly name' input field.

9. Specify the remaining **Assembly Details**:

Create Part or Assembly

Details

Part/Assembly name
Test 24-Port Modular Patch Panel with DWT

Description
Modular Patch Panel with Duplex Wire

Manufacturer

Catalog Number
AP01A

Phase Code
PCAP01A

Cost Code
CCAP01A

Unit of Measure	Material cost	Labor rate (mins)	↔
	29.5	40	
	Calculated from parts	Calculated from parts	

Catalog to include this material in
Custom

CANCEL
SAVE

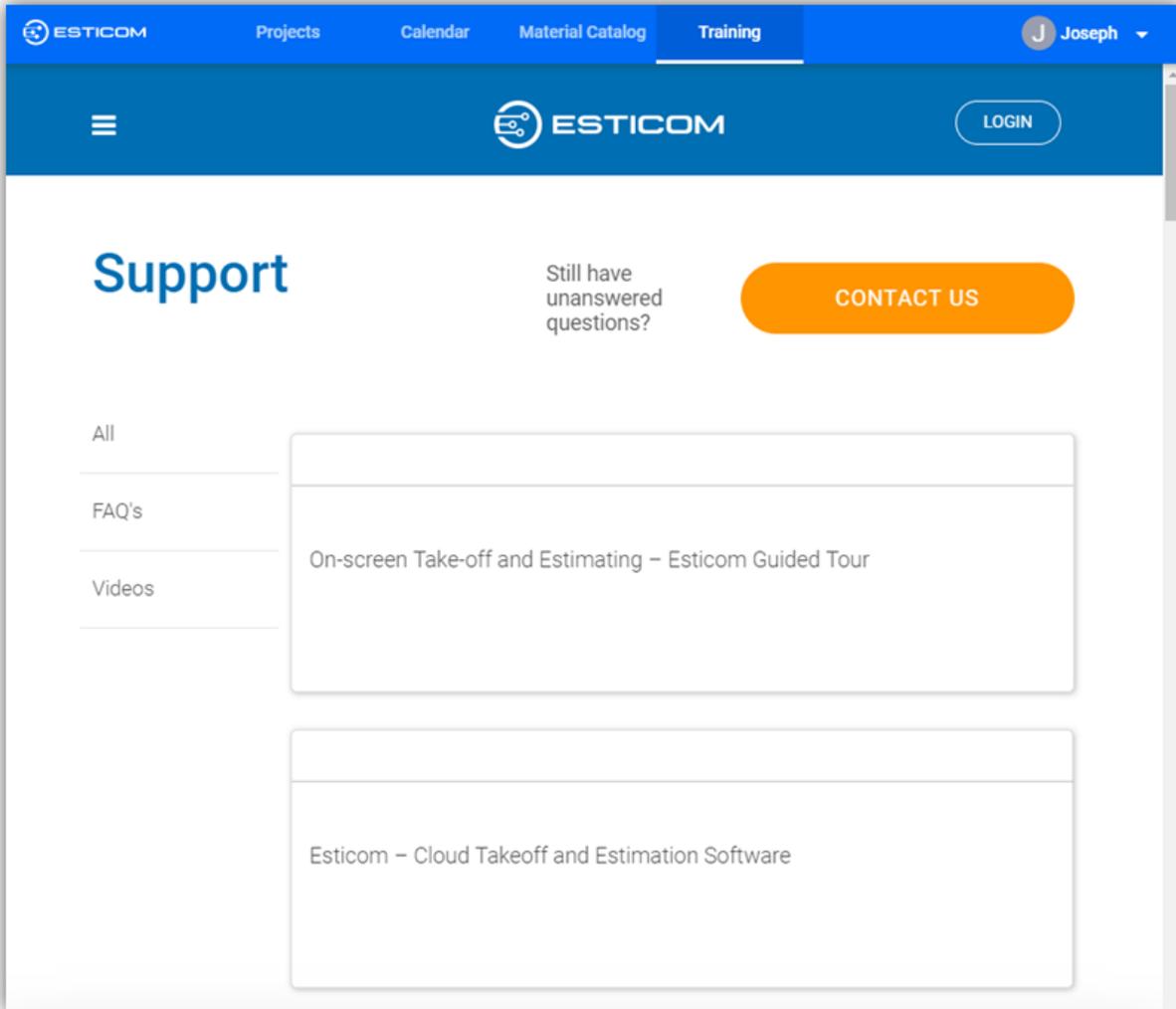
Field	Instructions
Part/Assembly name	Enter the assembly name.
Description	Enter the assembly description.
Manufacturer	Enter the Manufacture'sr name if necessary.
Catalog Number	Enter the assembly's catalog number.
Phase Code	Enter the assembly's phase code.

Cost Code	Enter the assembly's cost code.
Unit of Measure	Click the drop-down arrow to select the assembly's appropriate unit of measurement.
Material Cost	By default, this field displays a calculated value from selected parts.
Labor Rate (mins)	By default, this field displays a calculated value from selected parts.
Catalog to include this material in	Click the drop-down arrow to select a catalog where you want this assembly/material to include in. Note: you can add this assembly/material to a new catalog clicking the New Catalog link.

10. Review the selected parts and specified details before saving.
11. Click **SAVE** to create the assembly.

Training

The Training feature leads you to Esticom’s Support page wherein you can access training videos and FAQ articles. We are currently building up our Support page to ensure that all questions, suggestions, etc. are going to be addressed in a timely manner.



If you require immediate assistance, you can send us a message by clicking the CONTACT US button or give us a call at 512-337-6978.