

3.2.1.4. Estimation Templates

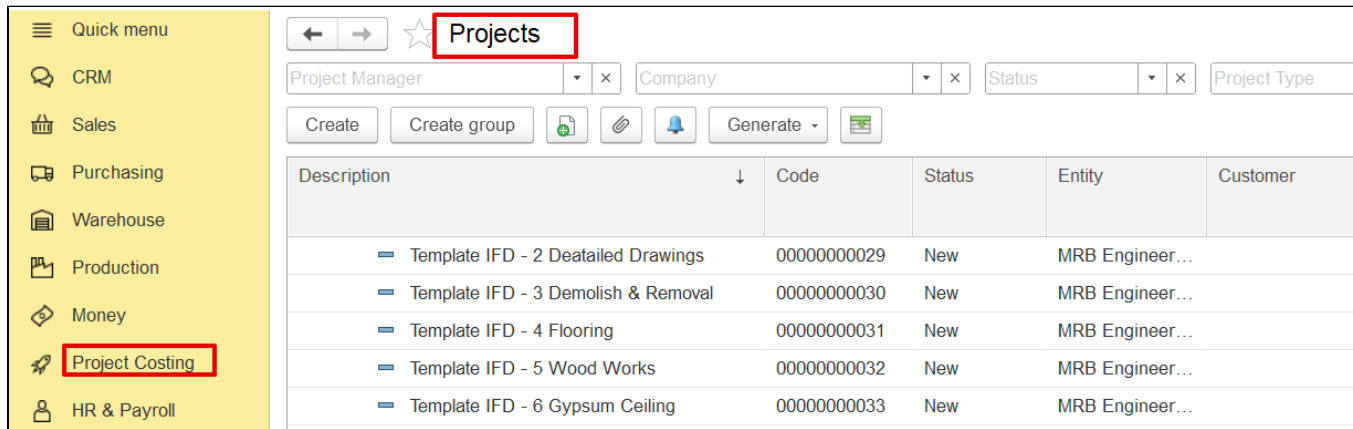
Project templates are ready-made templates that simplify creating new project estimates. They ensure consistency and save time by reusing standard formats and structures.

Each template contains predefined:

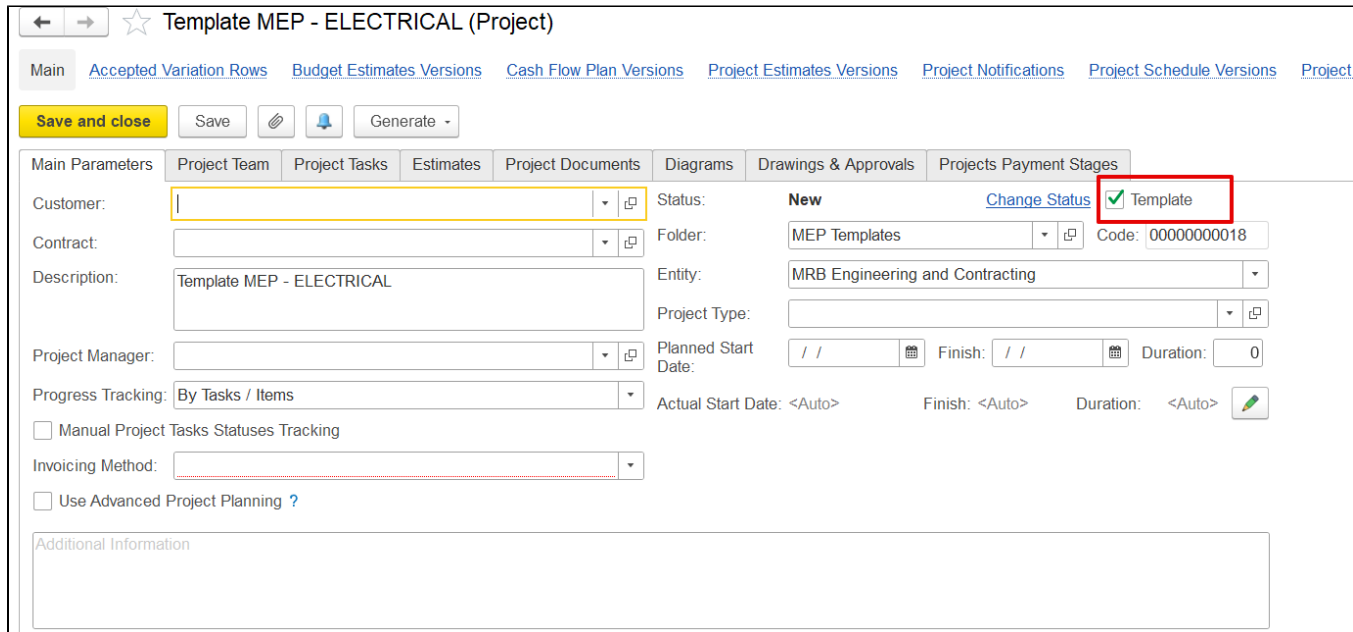
- WBS (Work Breakdown Structure) or hierarchy
- Cost and revenue structures
- Standard tasks, UOMs, and pricing
- Overheads and markup percentages (if applicable)

1. How to Create a Project Template

- **Go to the Projects Module**, navigate to the **Projects** screen from the main menu.



- **Click "Create."** to open a new project entry form.
- **Enter Template Details**
 - **Description:** Name of the template (e.g., "Template MEP – ELECTRICAL").
 - **Status:** Set as "New".
 - **Check 'Is Template':** This marks the project as a reusable template.
 - **Entity, Company, and Project Type:** Fill these as needed for categorization.



- **Build the Estimate Structure**

- Go to the **Estimates** tab.
 - Manually enter cost and revenue items or import BOQ from Excel.
 - Include WBS codes, units, prices, overheads, and markups.
- **Save**
Once the structure is complete, click **Save**. The project is now available as a template.

2. How to Use a Project Template

The **Fill by Template** feature allows the Project Estimate document to be automatically populated using predefined templates. These templates, stored in the database, contain standardized revenue structures that promote consistency and improve efficiency across multiple projects.

Templates are displayed according to the selected cost calculation method. For estimates where the “Cost is calculated based on revenue,” only templates with matching settings will be shown, and the same applies in the case of Independent Calculations of Costs and Revenues.

This functionality is accessible directly within the Project Estimate document.

Click on the **Fill by Template** option to fill in the revenue and cost tab.

The screenshot displays the 'Fill by Templates' window, which is divided into two main sections: 'Templates' and 'Templates Revenue Rows'.

Templates: This section contains a table listing various templates with their respective revenue and cost values.

Code	Description	Revenue	Cost
0000000001	Template CnC - Bill No : 01 - P...	21,324.00, ج.د.	17,770
0000000002	Template CnC - Bill No : 02 - E...	46,254.00, ج.د.	35,580
0000000003	Template CnC - Bill No : 03 - C...	213,994.00, ج.د.	160,450
0000000004	Template CnC - Bill No : 04 - M...	33,436.00, ج.د.	25,720
0000000005	Template CnC - Bill No : 05 - TH...	14,222.00, ج.د.	10,940
0000000006	Template CnC - Bill No : 06 - ST...	47,996.00, ج.د.	36,920
0000000007	Template CnC - Bill No : 07 - R...	55,367.00, ج.د.	42,590
0000000008	Template CnC - Bill No : 08 - D...	75,816.00, ج.د.	58,320
0000000009	Template CnC - Bill No : 09 - FL...	69,647.85, ج.د.	50,620
0000000010	Template CnC - Bill No : 10 - P...	29,952.00, ج.د.	23,040
0000000011	Template CnC - Bill No : 11 - W...	131,222.00, ج.د.	100,940
0000000012	Template CnC - Bill No : 12 - EL...	56,251.00, ج.د.	43,270
0000000013	Template CnC - Bill No : 13 - P...	7,085.00, ج.د.	5,450
0000000020	MEP Project Template	105,096.00, ج.د.	85,080

Templates Revenue Rows: This section provides a detailed view of the revenue structure for a selected template. It includes columns for Project Task, Item, Quantity, Unit Cost, Total Cost, and Markup, %.

Project Task	Item	Quantity	Unit Cost	Total Cost	Markup, %
Bill No - 01 - PREL...	Provide and mai...	1.000	Item 3,030.00, ج.د.	3,030.00, ج.د.	20.00
Bill No - 01 - PREL...	Provide, maintai...	1.000	Item 1,550.00, ج.د.	1,550.00, ج.د.	20.00
Bill No - 01 - PREL...	Supplying temp...	1.000	Item 2,490.00, ج.د.	2,490.00, ج.د.	20.00
Bill No - 01 - PREL...	Provision of of ...	1.000	Item 2,840.00, ج.د.	2,840.00, ج.د.	20.00
Bill No - 01 - PREL...	Name board	1.000	Item 3,170.00, ج.د.	3,170.00, ج.د.	20.00
Bill No - 01 - PREL...	Mobilization	1.000	Item 1,620.00, ج.د.	1,620.00, ج.د.	20.00
Bill No - 01 - PREL...	Other necessar...	1.000	Item 3,070.00, ج.د.	3,070.00, ج.د.	20.00

Project Estimates: This section is currently empty and contains a search bar and a 'More actions' dropdown menu.

Project Task	Item	Content	Quantity	Unit Cost	Cost	Overhead	Total Cost	Markup, %	Markup Amo...	Amount
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The screen is divided into two parts:

Left Side: Displays a list of all available template projects marked as templates in the database.

Right Side: Shows the **revenue rows** from the selected template.

Templates Revenue Rows:

Pick Pick All Search (Ctrl+F) More actions -

Project Task	Item	Quantity		Unit Cost	Total Cost	Markup, %
Bill No : 01 - PREL...	Provide and mai...	1.000	Item	3,030.00, ج.د.	3,030.00, ج.د.	20.00
Bill No : 01 - PREL...	Provide, maintai...	1.000	Item	1,550.00, ج.د.	1,550.00, ج.د.	20.00
Bill No : 01 - PREL...	Supplying temp...	1.000	Item	2,490.00, ج.د.	2,490.00, ج.د.	20.00
Bill No : 01 - PREL...	Provision of of ...	1.000	Item	2,840.00, ج.د.	2,840.00, ج.د.	20.00
Bill No : 01 - PREL...	Name board	1.000	Item	3,170.00, ج.د.	3,170.00, ج.د.	20.00
Bill No : 01 - PREL...	Mobilization	1.000	Item	1,620.00, ج.د.	1,620.00, ج.د.	20.00
Bill No : 01 - PREL...	Other necessar...	1.000	Item	3,070.00, ج.د.	3,070.00, ج.د.	20.00

Project Estimates (create)

Main Approvals History of Approval History of Object Status Changes Taken Decisions

Post and close Save Post Generate - Settings Fill by Templates Change Cost Set Markup -

Main Revenue and Costs Overhead

Project: [] Number: <Auto> From: 5/ 4/2025 8:05:15 PM

Area Sq.m: 0.000 Sq.ft: 0.000 Type: Initial

Company: [] Entity: MRB Engineering and Contracting

Contract: [] Responsible: Yusuf

Estimate by Period [AED • Wholesale price • VAT Applied • Prices Include VAT](#)

Comment

You can select a single line, multiple lines, or all lines. To add a line to your project estimate, hover over it and click *Pick*. The selected line will appear in the estimate table below, where quantity and markup can be adjusted. Cost, total cost, and markup amount will be calculated automatically.

Project Estimates:

Delete Row Search (Ctrl+F) More actions -

Project Task	Item	Content	Quantity	Unit Cost	Cost	Overhead	Total Cost	Markup, %	Markup Amount	Amount
FF - Sitting	LED TV 46" wide Samsung	Supply, customize and installation of full height TV ...	1.000 Pcs	24,000.00, ج.د.	24,000.00, ج.د.	ج.د.	24,000.00, ج.د.	30.000	7,200.00	31,200.00, ج.د.
FF - Sitting	Supply and delivery of center table	Supply and delivery of center table. Size: 1000mm L x ...	2.000 Nos	5,720.00, ج.د.	11,440.00, ج.د.	ج.د.	11,440.00, ج.د.	30.000	3,432.00	14,872.00, ج.د.
FF - Sitting	Supply, customize and delivery of 3-seater sofa including ...	Supply, customize and delivery of 3-seater sofa including ...	2.000 Nos	11,900.00, ج.د.	23,800.00, ج.د.	ج.د.	23,800.00, ج.د.	30.000	7,140.00	30,940.00, ج.د.
FF - Sitting	Supply and installation of wallpaper	Supply and installation of wallpaper	1.000 Roll	970.00, ج.د.	970.00, ج.د.	ج.د.	970.00, ج.د.	30.000	291.00	1,261.00, ج.د.
					60,210.00		60,210.00		18,063.00	78,273.00

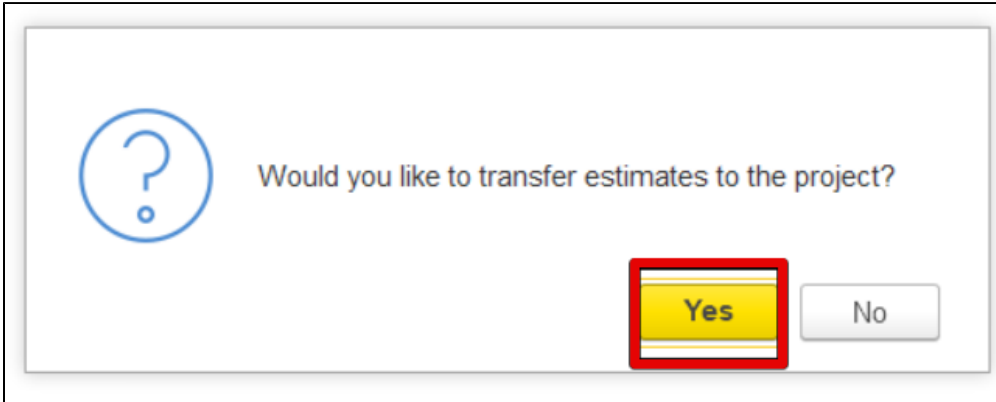
Cancel Next Step

Click *Next Step* once the project estimate tab is filled.

Fill by Templates *

Project Task \ Type \ Item & Expense Item	Quantity	Unit Cost	Cost	Overhead	Total Cost	Markup, %	Markup Amount	Revenue
1, FF - Sitting			60,210.00		60,210.00		30,000	18,063.00
LED TV 46" wide Samsung	1.000	Pcs 24,000.00	24,000.00		24,000.00		30,000	7,200.00
Supply and delivery of center table	2.000	Nos 5,720.00	11,440.00		11,440.00		30,000	3,432.00
Supply, customize and delivery of 3-seater sofa including fabric	2.000	Nos 11,900.00	23,800.00		23,800.00		30,000	7,140.00
Supply and installation of wallpaper	1.000	Roll 970.00	970.00		970.00		30,000	291.00

This displays all tasks and subtasks, along with detailed revenue lines, quantity, unit cost, and markup. Click *Fill* to transfer this structure to the project.



The Estimation Document will be filled out accordingly.

Project Estimates MEPE25-00000001 dated 5/4/2025 8:05:15 PM *

Main | Approvals | History of Approval | History of Object Status Changes | Taken Decisions

Post and close | Save | Post | Generate | Settings | Fill by Templates | Change Cost | Set Markup | Refill Cost Prices | More actions

Main | Revenue and Costs (4) | Overhead

Estimation | Project Structure

Revenue (4)

#	Code	Reason	Parent	Project Task	Item	Content
1	1.1	Not Applicable		GF - Sitting	LED TV 46" wide Samsung	Supply, customize and installation of full height TV cabinet with shutters + LED ...
2	1.2	Not Applicable		GF - Sitting	Supply and delivery of center table	Supply and delivery of center table. Size: 1000mm L x 1000mm W
3	1.3	Not Applicable		GF - Sitting	Supply, customize and delivery of 3-seater sofa including fabric	Supply, customize and delivery of 3-seater sofa including fabric. Size: ...
4	1.4	Not Applicable		GF - Sitting	Supply and installation of wallpaper	Supply and installation of wallpaper

Costs (2)

#	Parent	Project Task	Expense Item	Cost Element	Resource	Quantity per Unit	Quantity	UOM	Price	Price Includes
1		GF - Sitting	Cost of Materials	LED TV 46" wi...	Not Applicable	1.000	1.000	Pcs	23,000.00	<input type="checkbox"/>
2		GF - Sitting	Sub Contract	TV Installation ...	Not Applicable	1.000	1.000	Pcs	1,000.00	<input type="checkbox"/>

Show Cost Estimates for the Selected Row

Not Posted | Administrator | Draft (changed 5/4/2025)

Discount: 0.00 | Revenue: 78,273.00 AED | Overhead: 0.00 AED

0.00 | Costs: 60,210.00 AED | Profit: 18,063.00 AED

If the template included cost lines linked to revenue, those links will be transferred as well.

Review the details and click on the post to complete the process.