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Meet ProEst: Construction Estimating in the Cloud

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Autodesk

Learning Objectives

- Discover how the cloud-based ProEst estimating platform keeps teams connected and collaborating, anytime, anywhere.
- See why ProEst's multiple cost database options help drive more-competitive project proposals.
- Learn how ProEst improves bid accuracy by connecting digital takeoff and estimating processes.
- Learn how ProEst integrates with Autodesk Build to connect project data from preconstruction to construction.

Description

As the construction industry continues to benefit from the adoption of digital tools, old-school manual estimating techniques are quickly becoming obsolete. The better way? ProEst, the latest addition to Autodesk Construction Cloud. In this session, we'll take a closer look at how the advanced automation features of ProEst can improve bidding accuracy, reduce estimating time, and increase visibility into key project metrics. We'll demonstrate how the cloud-based ProEst platform streamlines preconstruction workflows to save time and money -and how your teams can benefit from new levels of connectivity and collaboration.

Speaker

Troy Simon
Head of Client Services, ProEst, Autodesk Construction Cloud

Troy serves as the Head of Client Services for ProEst and has spent nearly 2 decades working with contractors of all types and sizes. Because thoughtful collaboration and understanding of the needs and goals of our clients are his top priorities, Troy often serves as a bridge between our product development team and Autodesk clients to help deliver the best possible outcomes related to software deployment, software enhancements, and best practices.

Objective 1: Discover how the cloud-based ProEst estimating platform keeps teams connected and collaborating, anytime, anywhere.

The Excel dilemma

The challenge with programs like Excel is that they're the solutions we love to hate. I speak with hundreds of new customers each year at their implementation kickoff meetings, and more than 50% of those all have some variation of the following statements: "Excel is not consistent", "it's not collaborative", and/or "it's error-prone". Formulas can easily be manipulated, get changed or deleted, and often, there are multiple iterations of the same worksheet used by multiple estimators within an office so there's no (or at least limited) standardization.

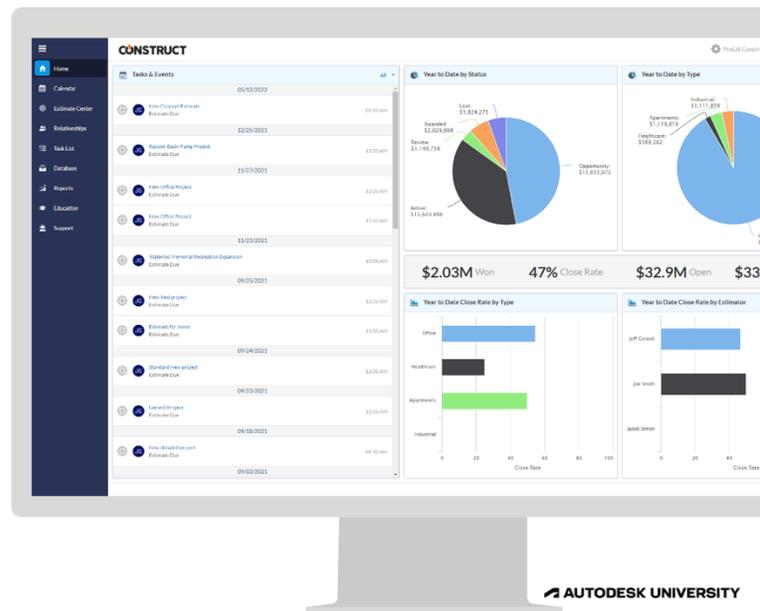
According to a study by Intuit, 1 in 4 construction companies would go out of business if they made just two or three inaccurate estimates. I know that everyone here is very aware, that a construction project starts well before you break ground, and its margin can be won or lost long before the first excavator is moved on site. And I certainly don't have to tell you how hard it is to make up a 6 or 7-figure mistake on a project (it can be impossible to do.) A 2019 Construction Technology report stated that "65% of companies are still heavily dependent on spreadsheets to manage their estimating workflow." My question to you is, WHY?

Benefits of cloud estimating

ProEst is an estimating solution born in and built for the cloud. It's going to give you better confidence that your estimates are accurate and competitive. Gone are the days of broken excel formulas, no more copy-paste, no more multiple iterations of an excel template.

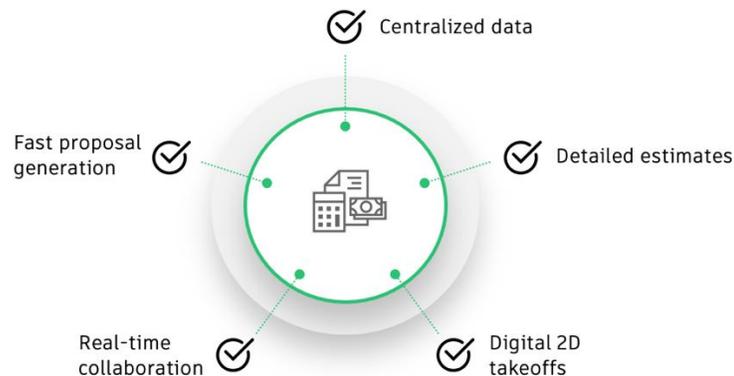
ProEst

General Contractors and Subcontractors use ProEst's cloud-based estimating solution to ensure that their estimates are accurate, bids are competitive, and projects are profitable.



What makes ProEst different is the centralized data that can be accessed from anywhere. Good preconstruction data is dependent on the standardization of how you input and gather the data, to begin with. Data needs to be accurate. ProEst allows your team to work collaboratively, going from Estimate to Proposal in a single platform.

Cloud-based estimating solution

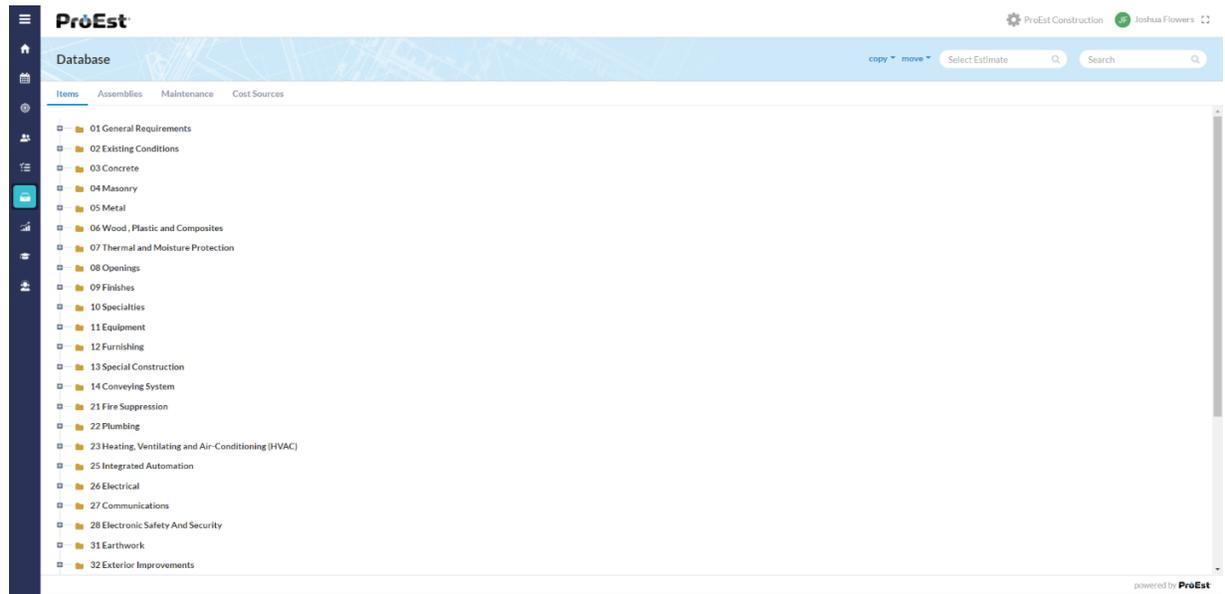


 AUTODESK UNIVERSITY

Add to that, there's integrated takeoff built into ProEst if you want to completely avoid double entry. You'll get an easy-to-use (custom) report builder to build proposals and custom cost reports. And we have some of the best integrations to the most popular construction cost management and analytics tools, like Power BI, Autodesk Build, and many more!

Objective 2: See why ProEst's multiple cost database options help drive more competitive project proposals

ProEst has complete database offerings like ProEst Costbook and RS Means that have city cost index multipliers to help you get the most accurate conceptual pricing based on the region you're building in.



Database items and organization

The database is already filled in with the common items used in the construction industry; the pricing applied is the national average for those items. Items can also be added to the database, edited, or deleted out of the database. It's recommended to go through the database and clear out unwanted items and update the cost for items that are being kept.

Furthermore, the database is organized in a folder structure with division and when expanded subdivision folders and within the subdivision individual line items. Division and Subdivision can be renumbered, renamed, or deleted at any time in the database, when Division to Subdivision has been deleted all items in that Division or Subdivision are also deleted. Items in the database can be created, modified, copied, or moved in the database as well.

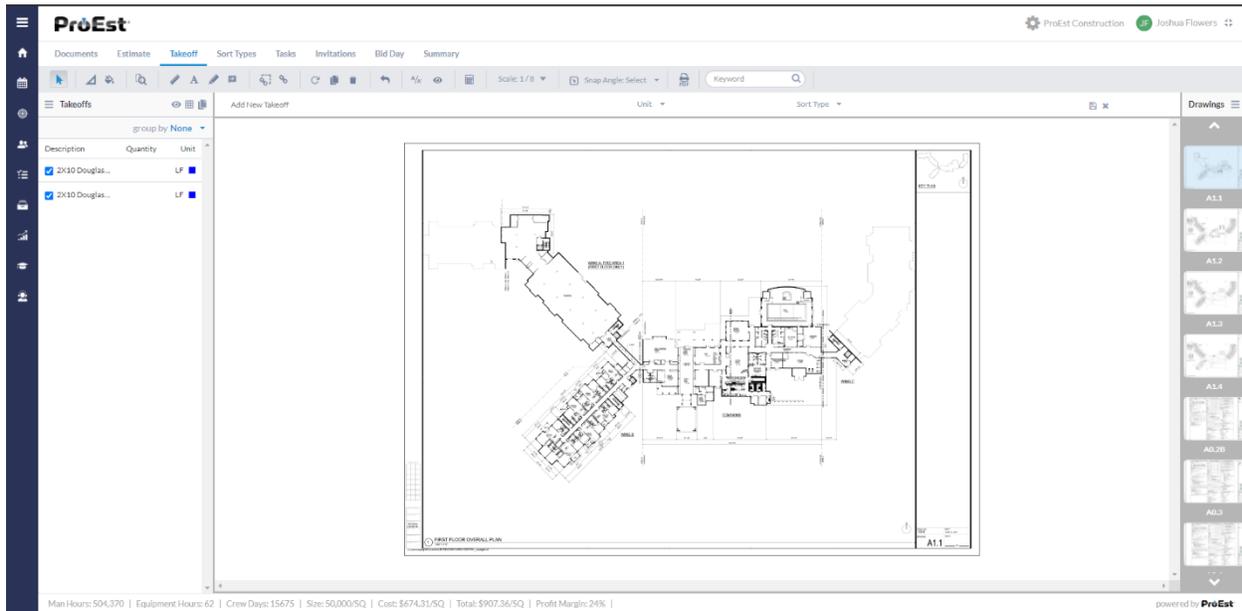
Any changes to the database will not affect existing estimates as far as removing items or changing costs unless the item was added to the estimate after the change was performed.

Objective 3: Learn how ProEst improves bid accuracy by connecting digital takeoff and estimating processes.

What makes ProEst unique is the integrated takeoff built into the estimating process.

The Takeoff tab is where the user will find the pdf plan that was imported from the documents tab. There are 4 main sections: Takeoffs, Drawings, Menu Bar, and Image.

- Takeoff Layers: Here is where all the takeoff added to the image will be displayed. Here is where you can edit the variable color, size, and style.
- Drawings: Here is where all the drawings assigned to takeoff will be listed
- Menu bar: Here is where all the tools that can be used will be listed.
- Image: Here is where the user will perform actual takeoffs.



Objective 4: Learn how ProEst integrates with Autodesk Build to connect project data from preconstruction to construction.

With this integration, contractors can convert their detailed estimates from ProEst to project budgets in the Cost Management module in Autodesk Build – seamlessly passing the reins from preconstruction to the field team, where they can manage all cost activities in a central location.

[See a detailed demo video here.](#)

Setting up the integration

In ProEst, the segments, delimiters, and cost types are defined at the company level.

Project Types

Users can import the Project Types from Autodesk Construction Cloud into the ProEst Estimate Types.

Budget Segments Setup

Budget Segments can be set up for sending over ProEst Estimate to Autodesk Build. This can be set with as many segments as needed. If using a Template be sure to use the same Segment descriptions that you have set in the Cost Management setup.

Budget Segment Setup

Add New

Where	Assign	Delimiter	Default Description	
Code	Phase	Point	<input type="radio"/>	
Code	Division	Point	<input checked="" type="radio"/>	
Code	Cost Type	None	<input type="radio"/>	
Info	Estimate Code	None	<input type="radio"/>	

To Setup New Segment

1. Click on Add New
2. Under “Where” – select Code, Info, or Column
3. Under “Assign” – select Division or Sort Type to be used for Code and Description
4. Under “Delimiter” – select the delimiter to use
5. Select what segment you like to use for Description in Budget

Cost Type

When selecting Cost Type as an option in Segment Setup it will use this section to set the code and description for the segment.

[See a detailed demo video here.](#)

Converting estimate to budget

Once the integration is set up, choose the Autodesk Construction Cloud account, and project you want to send the budget to. Change the Estimate Status to Awarded and click Save.

AUTODESK Construction Cloud

ProEst Plaza

Cassie Bustos

Budget

Main Contract Budget Payment Application

Lock budget Export Groups (2) Division - Cost

General		General		Budget				
Budget Code ^	Budget Name	Cost Type	Supplier Contract	Original Budget	Internal Budget Transfer	Approved Owner Changes	Revised Budget	Pending Owner Changes
Expand Collapse				39,565,380.97			39,565,380.97	
> Division: 01	General Requirements			1,103,250.00			1,103,250.00	
> Division: 02	Existing Conditions			19,575.00			19,575.00	
> Cost Type: LAB	Labor			19,575.00			19,575.00	
> Division: 03	Concrete			222,465.47			222,465.47	
> Cost Type: LAB	Labor			10,530.00			10,530.00	
02.03.1000	Concrete Forming And Access...	:	LAB	6,142.50			6,142.50	
02.03.2000	Concrete Reinforcing	:	LAB	4,387.50			4,387.50	
> Cost Type: MAT	Material			195,685.47			195,685.47	
02.03.1000	Concrete Forming And Access...	:	MAT	11,340.00			11,340.00	
02.03.1500	Concrete Accessories	:	MAT	35,640.00			35,640.00	
02.03.2000	Concrete Reinforcing	:	MAT	10,130.40			10,130.40	
02.03.2200	Welded Wire Fabric Reinforcing	:	MAT	6,075.00			6,075.00	
02.03.3100	Structural Concrete	:	MAT	132,500.07			132,500.07	
> Cost Type: SUB	SubContractor			16,250.00			16,250.00	
02.03.3500	Concrete Finishing	:	SUB	16,250.00			16,250.00	
> Division: 04	Masonry			23,766,990.28			23,766,990.28	
> Division: 05	Metal			1,349,550.41			1,349,550.41	
> Division: 06	Wood , Plastic and Composites			2,186,198.99			2,186,198.99	

The budget segments are automatically configured based on the settings from ProEst. And the project budget is available for the project team within the Budget tool where they can seamlessly manage all cost activities and compare actual costs against estimated budgets.