

Cost Estimate Exports

Exporting Cost Estimates

Cost Estimates can be generated for individual schedules or combined across multiple schedules or medium types.

To export a Cost Estimate for a single schedule or medium:

1. Select the **options menu (⋮)** on the relevant schedule line
2. Choose **Reports > Export Cost Estimate**
3. A Cost Estimate pop-up window will appear. Enter the required client contact details, such as:
 - Client name
 - Contact number
4. Select the required export format (**Excel** or **PDF**) and then select **Export**.

The Cost Estimate will be generated in portrait orientation and downloaded in the selected format.

Generating Cost Estimates for Multiple Mediums or Schedules

To combine multiple schedules or mediums into a single Cost Estimate:

1. Select the checkbox on the left of each schedule to be included
2. Select the **options menu (⋮)** menu on the plan
3. Choose **Reports > Export Cost Estimate**
4. Complete the required information and select **Export**.

The resulting Cost Estimate will include consolidated data from all selected schedules.

Cost Estimate Numbers, Revisions, and Customer PO Numbers

Cost Estimate numbers are generated automatically using a system number series and populate the **CE Number** field upon export.

Each time a Cost Estimate is re-exported, a new revision number is generated. Revisions are independent of the plan's status and increment sequentially with each export.

If a Customer Purchase Order (PO) number has been created and assigned to booking lines, the Customer PO number will automatically appear on the Cost Estimate when it is re-exported.

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