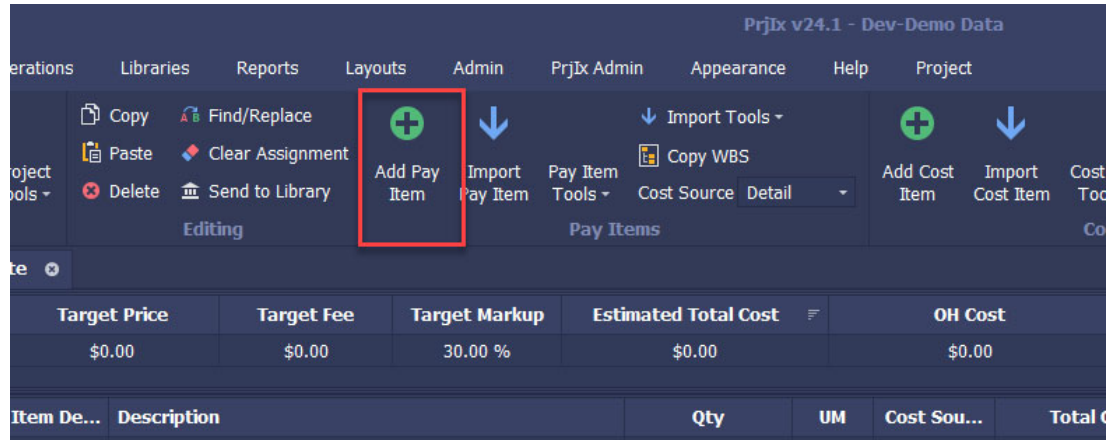


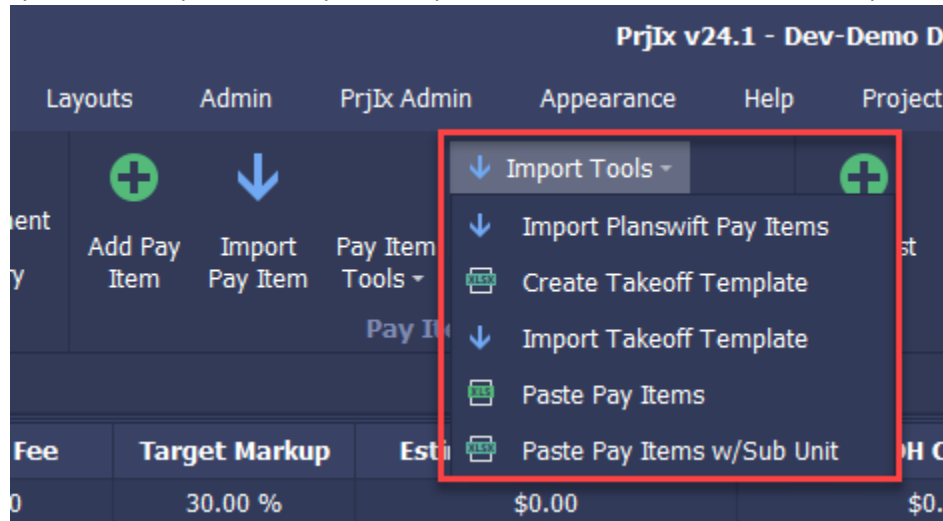
## Create Excel Import

- a. Open Project Cost Model
- b. Add New Pay Item to create template for:



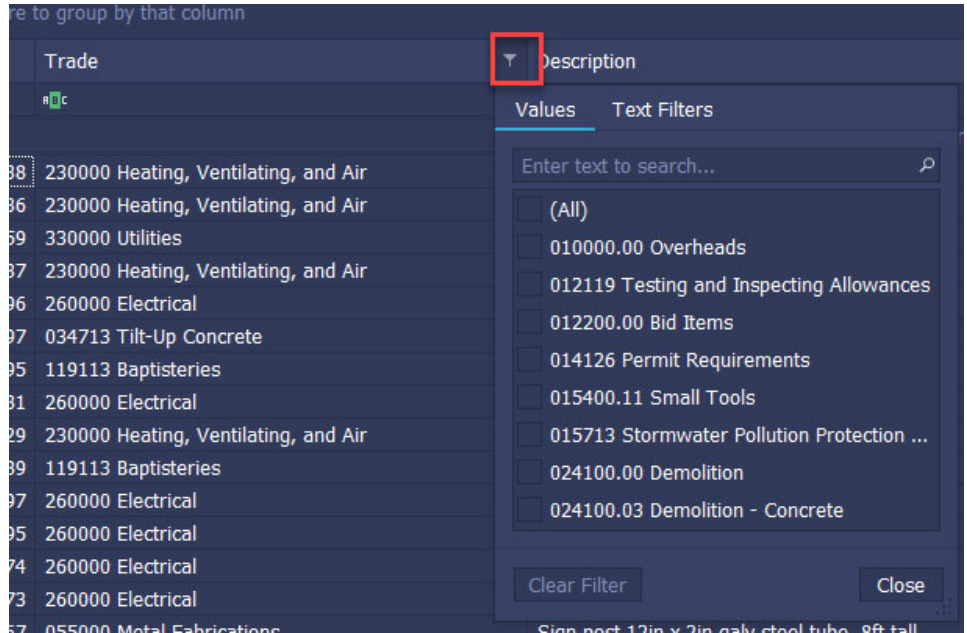
i.

- c. Select Pay Item and Expand the Pay Item Import Tools, select Create Takeoff Template



i.

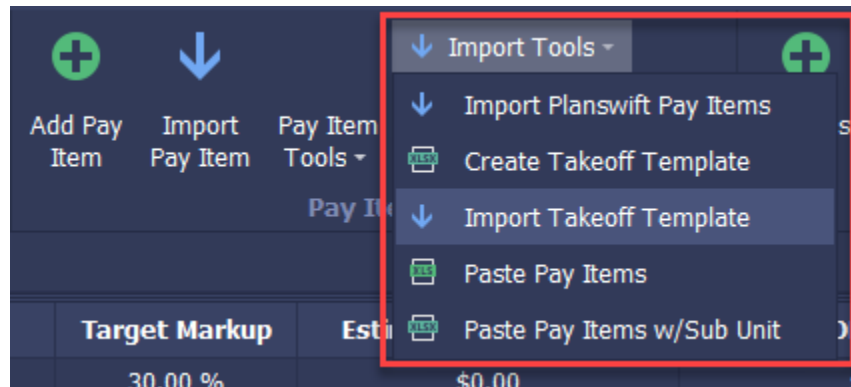
- d. The Cost Library dialog will appear and filter for the items you want to populate the template with.
  - i. Tips
    - 1. Trade Column is most common filtering column
    - 2. Header has expandable filter dialog you can use for selecting items to filter.



- a.
- e. Prjlx will create the Excel Template and prompt you to open it.
- f. Enter Quantities and Notes into template items from takeoff, Descriptions can be updated and only apply to items imported to project, not Cost Item Library.
  - i. Tips
    1. If New items are found not in your template, you can add custom items to template.
    2. UM is required for new item to import, list of UM are provided in the table cell dropdown.
    3. Trade is optional, a list of Trades is provided within the table cell dropdown.
    4. If cell dropdown's are not populated, use the Excel drag/copy feature to drag populated cells down to new rows.
    5. If you want new item to use a existing Cost Item to sync costs and details with, make sure it has the Cost Item Id field value.

Cost Item Id	Trade	Description	Takeoff Qty	UM	Notes
1433	024113 Demolition - Asphalt	Remove asphalt pavement		5 SF	
1434	024113 Demolition - Asphalt	Remove existing box culvert along county road		10 LF	
1435	024113 Demolition - Asphalt	Saw cut asphalt pavement		15 LF	
1016	024113 Demolition - Asphalt	AC Removal - Large Area		25 SY	
1126	024113 Demolition - Asphalt	AC Removal - Parking Lot		350 SY	
1015	024113 Demolition - Asphalt	AC Removal - Trench		5000 SY	

- g.
- h. After completing the update, Select the Pay Item and expand the Pay Item Import Tools and select Import Takeoff Template



- i. Prjlx will Import the items with Quantities from the template as child Cost Items to selected Pay Item, and sync the items with the Cost Item Library.

1		102260670	Takeoff Template	1.00	LS	Detail	\$501,15
Cost Items		Quotes					
Se...	Library Id	Description	Qty	UM	Cost Source	Unit	Direct Cost Total
→	1433	Remove asphalt pavement	5.0000	SF	Plug	\$0.50	\$2.50
	1434	Remove existing box culvert along count...	10.0000	LF	Plug	\$10.00	\$100.00
	1435	Saw cut asphalt pavement	15.0000	LF	Plug	\$12.00	\$180.00
	1016	AC Removal - Large Area	25.0000	SY	Detail	\$554.32	\$13,857.91
	1126	AC Removal - Parking Lot	350.0000	SY	Detail	\$504.80	\$176,680.00
	1015	AC Removal - Trench	5,000.0000	SY	Detail	\$62.07	\$310,331.25

- j.