

QUICK GUIDE

BUDGET SETUP



CREATE A PROJECT

1. Select **All projects & organizations** from the main menu.



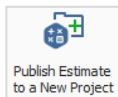
2. Click **+**, then fill out Project details.

* Project ID 16013	* External project ID 16013
* Name Wellington Crossway	* Status New
* Organization C-XYZ	

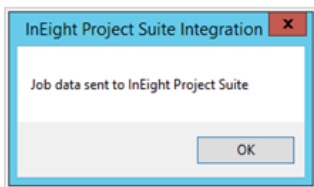
3. Click **Save and configure project settings** or **Save**.

PUBLISH ESTIMATE TO CONTROL

1. In Estimate, open the job you want to publish.
2. From the Integrations tab, select **Publish Estimate to a New Project**.



3. If successful, a dialog box indicates the data was sent.



4. Once processed, you'll receive an email from Cloud Platform.

IMPORT CBS FROM EXCEL

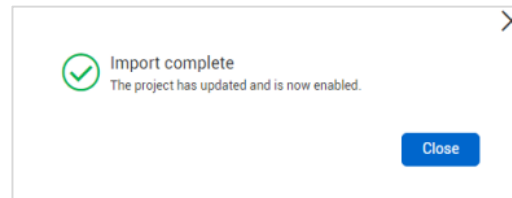
1. On the right toolbar select **Import**.



2. Select **Cost items** from the drop-down.
3. Browse to your Excel file and select **Open**.
4. Select **New items**, then click **Next**.
5. Map fields for CBS position, Description, WBS phase code, quantity, hours, cost and other columns as needed.

Allow as-built		Blank-do not import
CBS position	✓	CBS position

6. Click **Next**, then **Import Now**.
7. Once completed, an Import complete prompt appears.

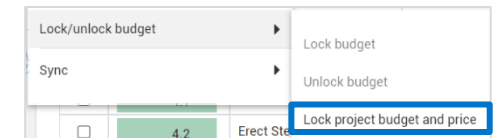


ACTIVATE THE PROJECT

1. Under the Project's Details tab, change the project status to **Active**.

* Status
Active

2. From the Actions menu, lock your budget.



3. Sync CBS and budget if integrating to an ERP.

NEED SOME MORE HELP?



Learn more in our Knowledge Library
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Take a course at InEight U
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NOTE: Visit learn.ineight.com for additional Estimate to Control setup instructions.

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BUDGET WORKFLOW

