

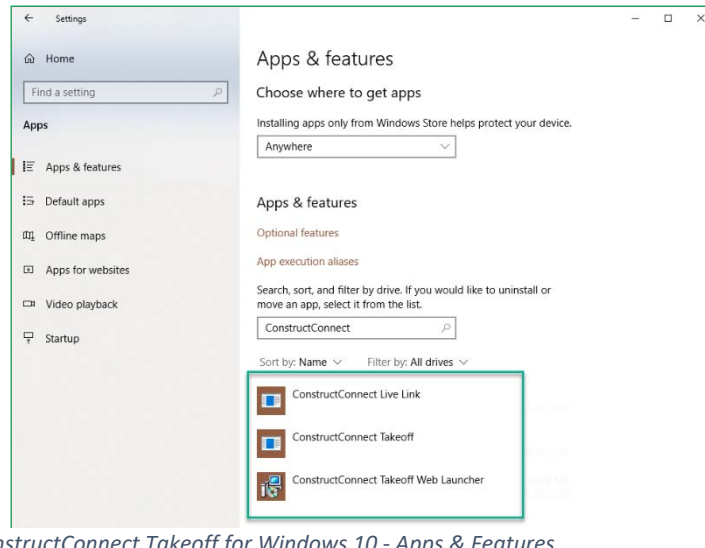
ConstructConnect Takeoff 2.2.0.0

Features

Introducing the ConstructConnect Live Link Add-in for Excel

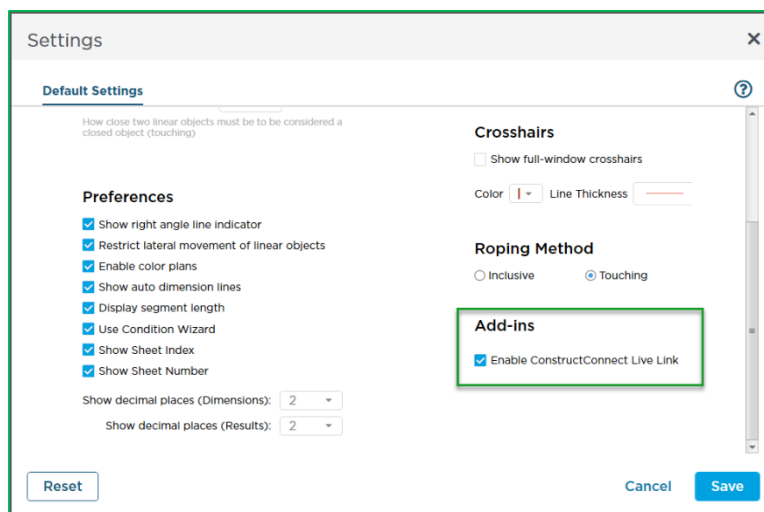
Improve efficiency and accuracy when estimating a bid by utilizing the “ConstructConnect Live Link”, a tight integration and live connection between your ConstructConnect Takeoff bid and Excel workbook

1. When you download and install version 2.2.0.0 (new installations or upgrades from previous versions), the Add-in gets installed automatically. You’ll see it in your Apps & Features (or Programs) list).



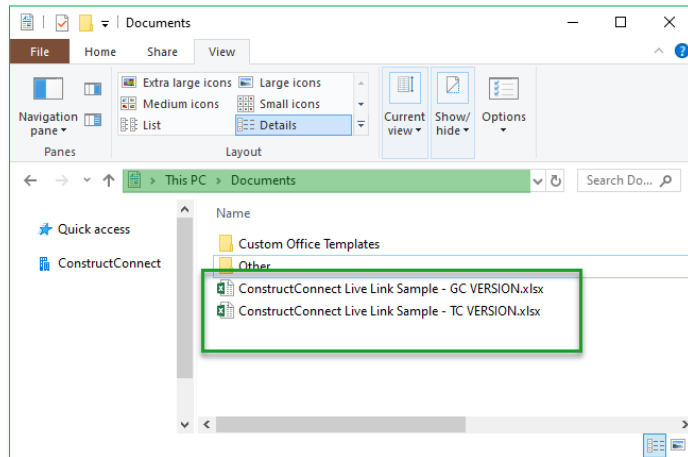
ConstructConnect Takeoff for Windows 10 - Apps & Features

2. By default, this Add-in is “enabled” in ConstructConnect Takeoff’s Settings. If the Add-in gets uninstalled somehow, clicking this option to “enable” it causes it to be installed again.

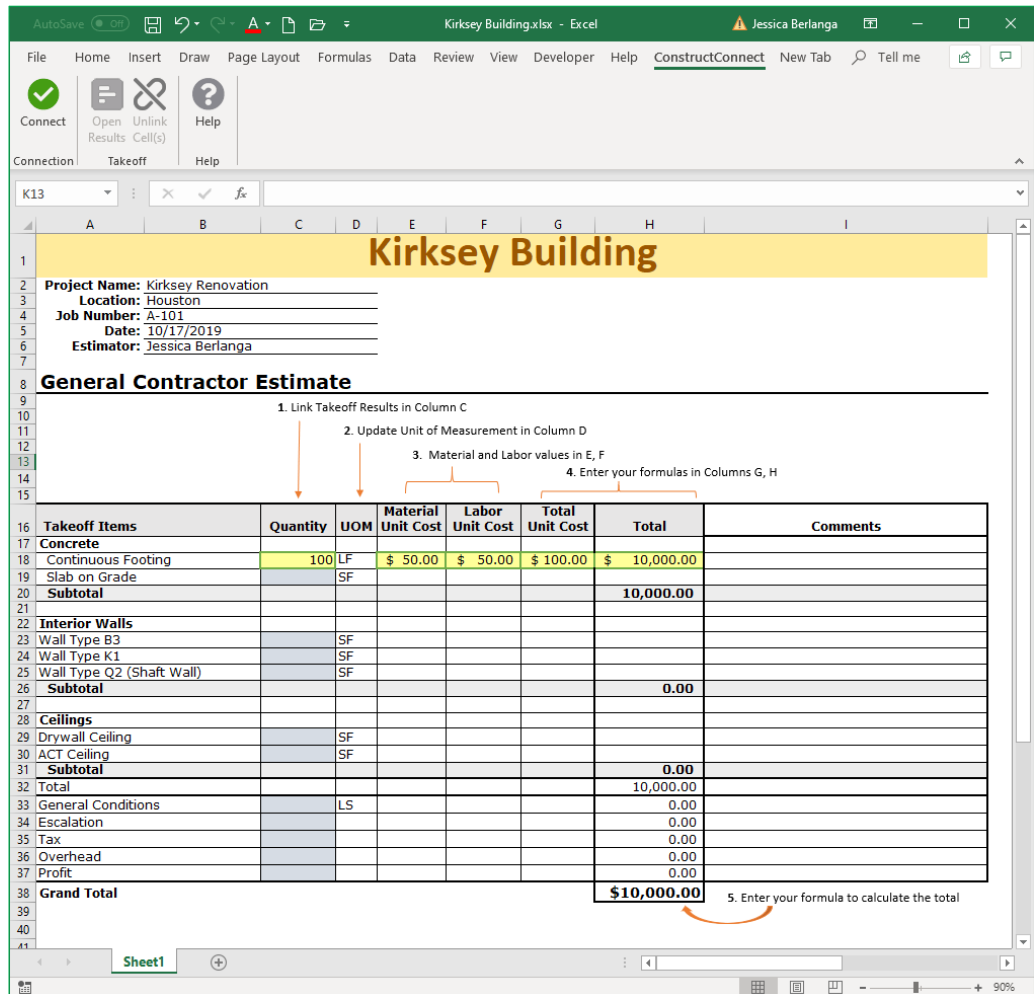


From ConstructConnect Takeoff, click on the Profile menu ->Settings option and enable ConstructConnect Live Link

3. We've included a couple example Excel files so you can get started using Live Link right away. Or use your own, existing Excel workbook. You'll find the examples in your "Documents" folder.

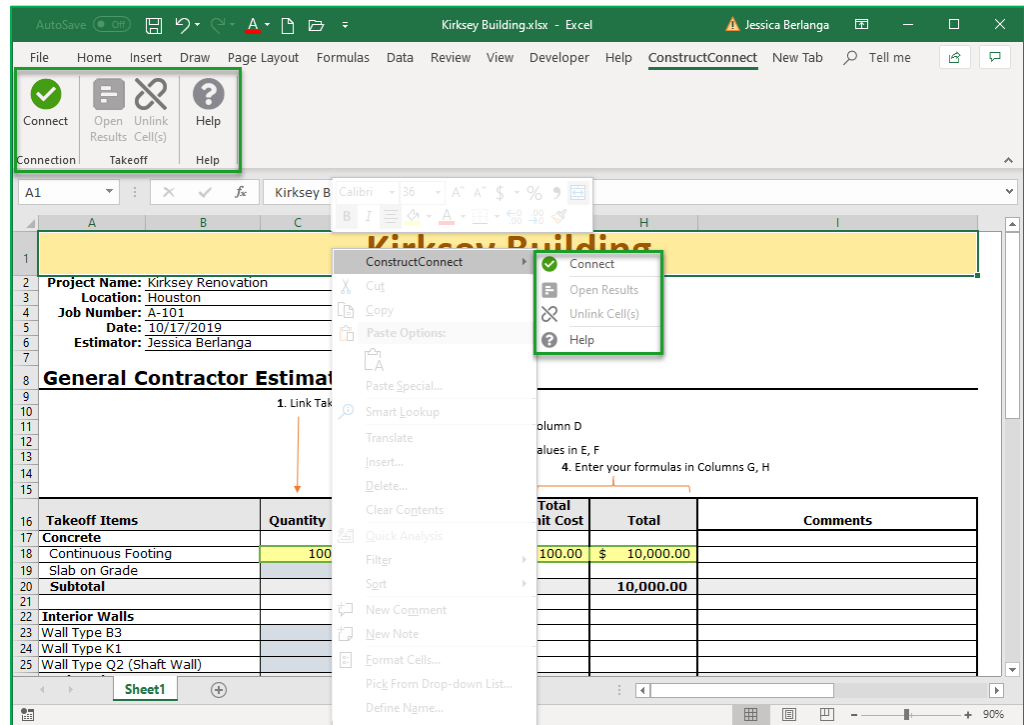


Sample workbooks located in the C:\Users\[localuser]\Documents folder

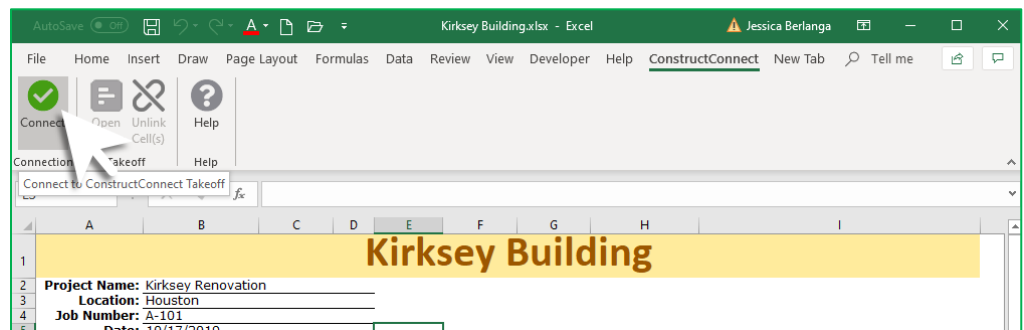


IMPORTANT! Save the sample with a new workbook name and update the details of your estimate and pricing BEFORE you connect your Excel workbook to your ConstructConnect Takeoff bid

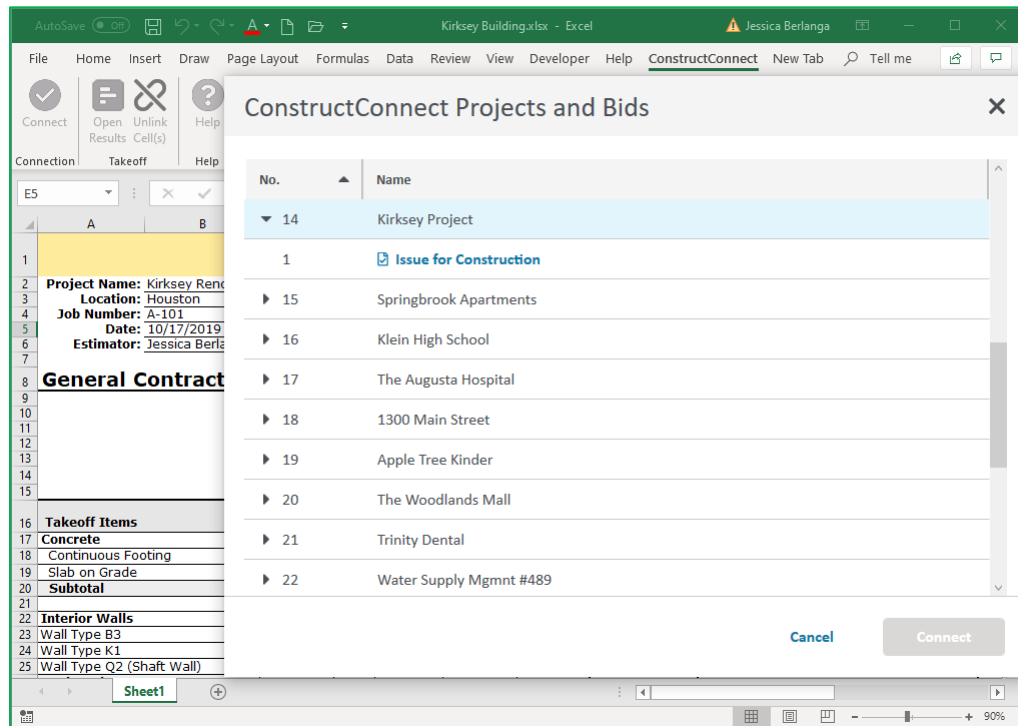
- In Excel, you should see the ConstructConnect tab on the Ribbon bar. You'll also see ConstructConnect options in the context menu (the right-click menu).



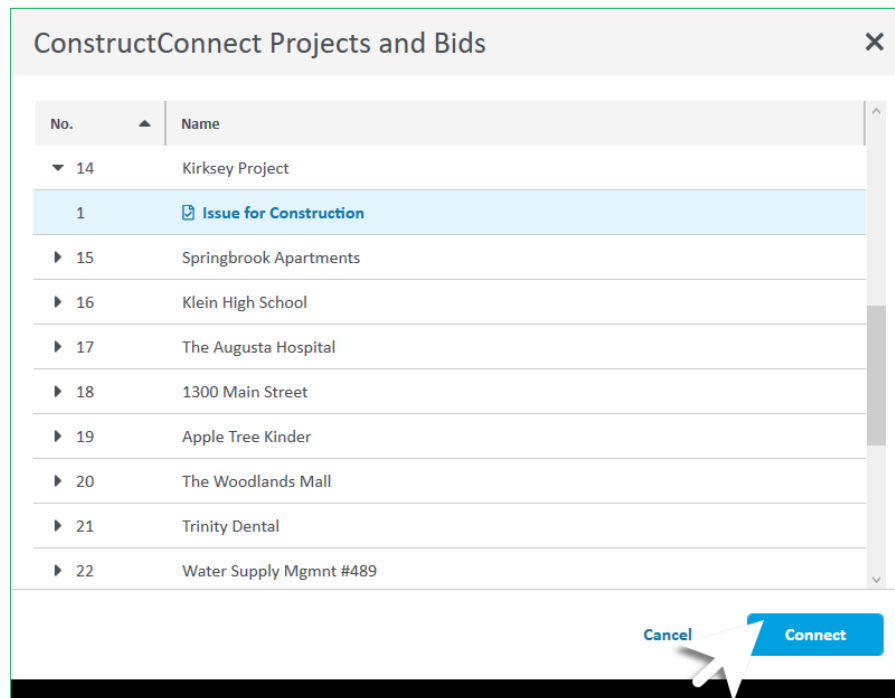
- The first step is to “Connect” your workbook to a ConstructConnect Takeoff bid. Click the Connect button



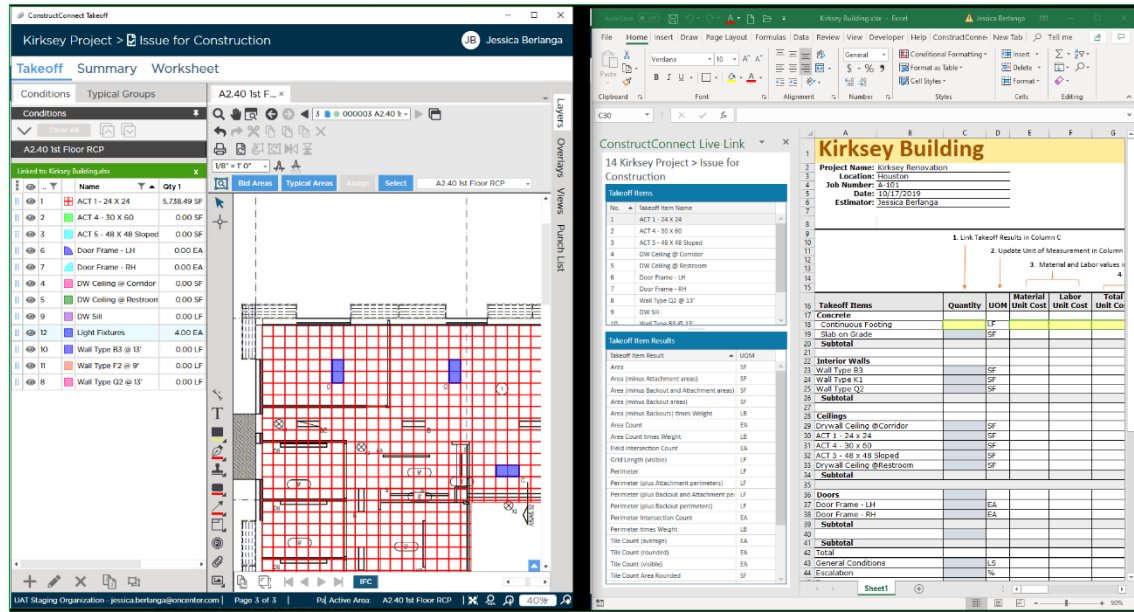
6. After a few moments, the ConstructConnect Projects and Bids screen opens. You can sort by either column by clicking the header. Click the sideways pointing arrow to expand a Project so you can see the Bids within. You connect your Excel file to a bid, not a project.



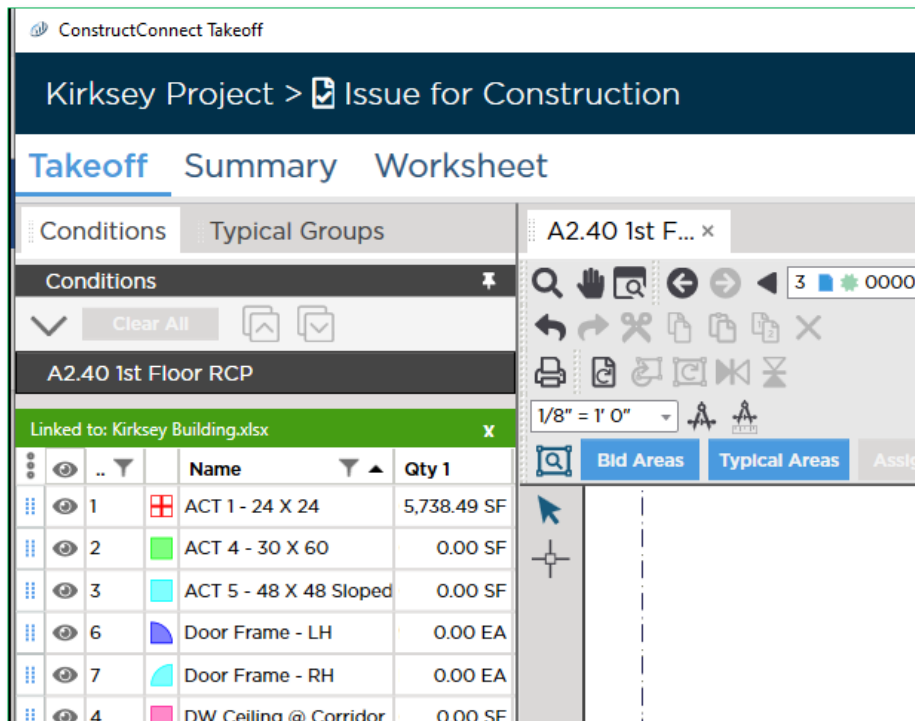
7. Connect to your bid from Excel by selecting your bid and clicking on **Connect**



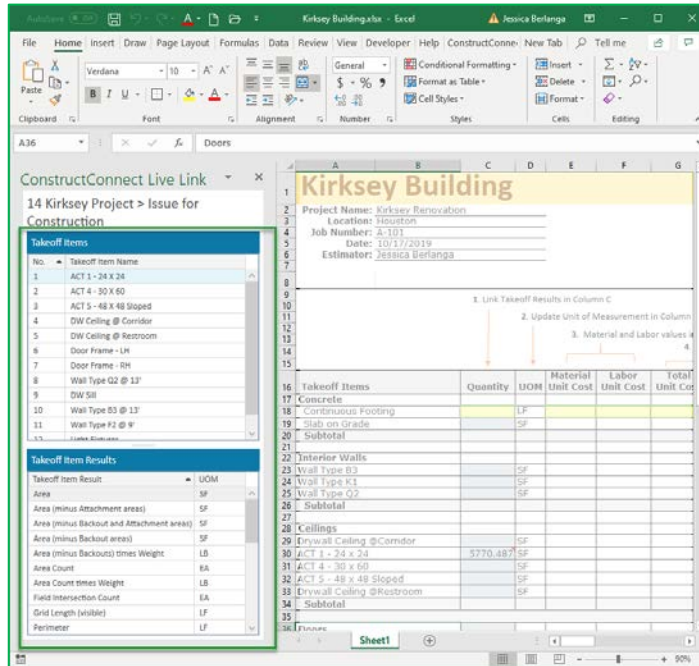
- ConstructConnect Takeoff needs to be open (with your bid open) to use Live Link. If Takeoff isn't already open, it'll launch when you connect to a bid. You can continue to make takeoff updates while working on your estimate in Excel, values are updated automatically as long as both programs are open. You keep your takeoff and estimate open, side-by-side.



- In Takeoff, you can tell you're connected to your workbook from the Takeoff Tab. There's a banner at the top of the Conditions list that indicates the workbook to which this bid is currently connected.

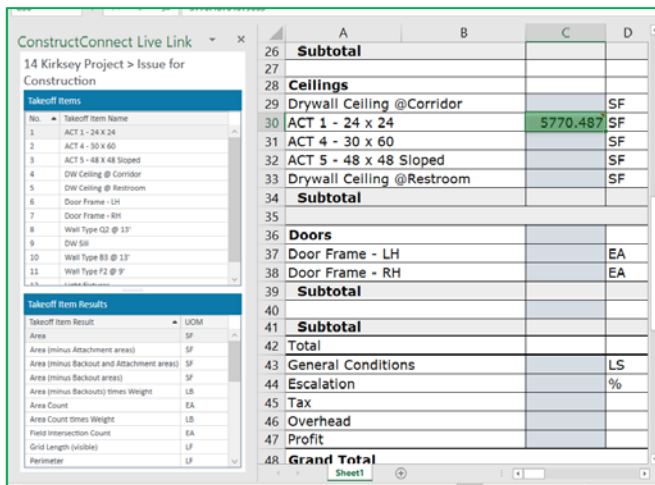


- In Excel, you see all your Takeoff Items (Conditions) in the upper section of the Live Link panel. When you select a Takeoff Item (Condition) in the upper section, you see all the Takeoff Item Results. The list of Results in Excel includes every possible Result for that Takeoff Item (Condition), not just the ones you see on the Takeoff Tab in CC-Takeoff.



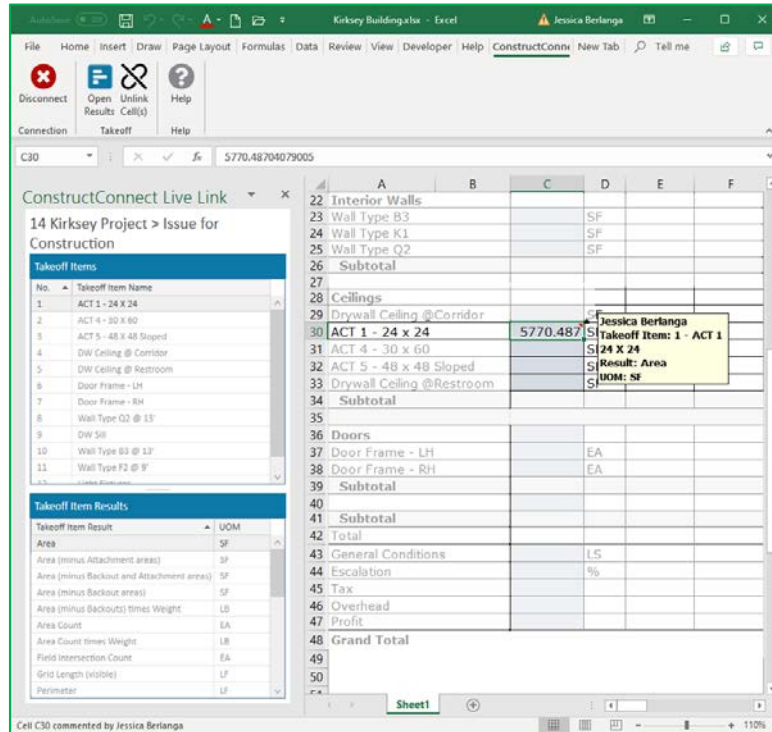
- Next, you want to create your Live Links within your workbook.

- Figure out where you want a Result inserted. Select one or more cells in the grid.
- Now, select the Takeoff Item (Condition) whose Result you want to link to that cell (or cells). *Notice: The Takeoff Item Results section populates with all the possible Results.*
- Double-click on the Takeoff Item Result you want linked to the cell (or cells).
- Assuming there is takeoff drawn using this Takeoff Item (Condition), the cell populates with the appropriate value.

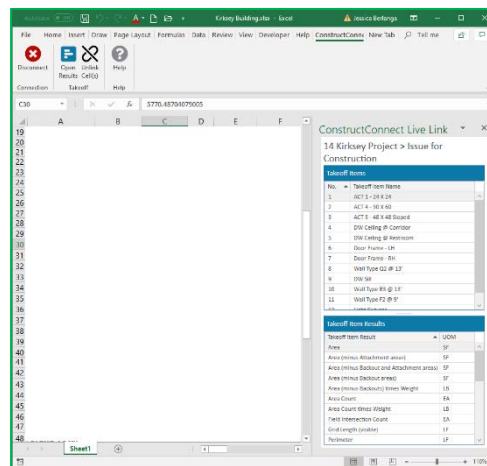
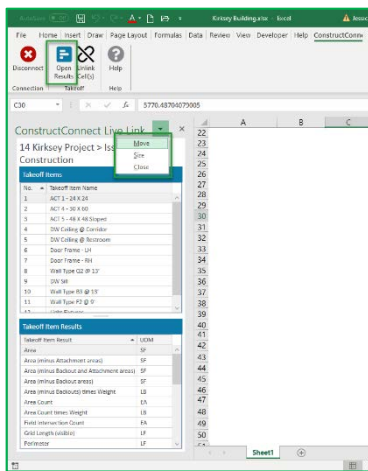


Select a cell then double-click on the Takeoff Item Result

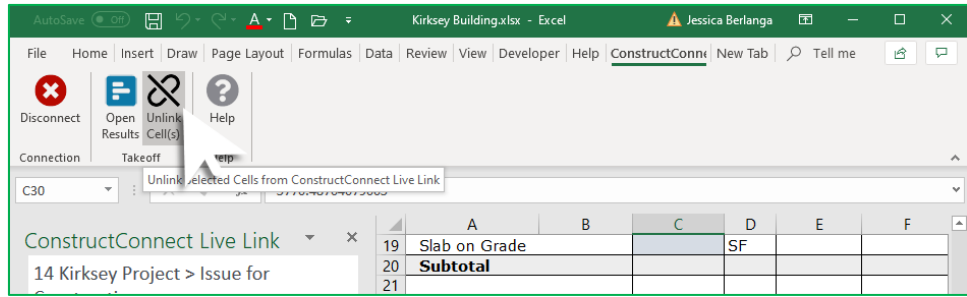
12. You can see the details of the Live Link including the Takeoff Item name, the Result, and the UOM by viewing the Comment for a cell. (You may need to resize the comment box to see all the details.)



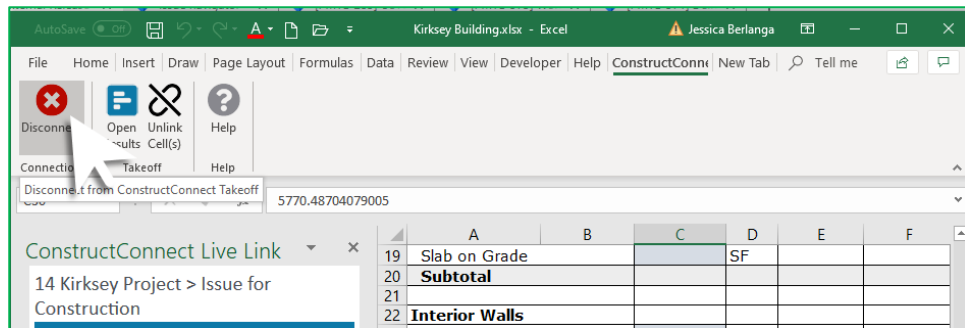
13. Adjust the Live Link panel or change its location in Excel by moving, resizing, or undocking it. Excel remembers the Live Link panel's location, and dock/undock state. You can even close open the Live Link Panel to maximize the grid. Just click Open Results when you need to see the Live Link panel.



14. Use the **Unlink Cell(s)** option to delete the Live Link. The cell will no longer receive updates from Takeoff.



15. You can “pause” active syncing between the Takeoff cloud and Excel by clicking the **Disconnect** button. Click **Connect** again to resume active syncing. *Once connected to a bid, the Excel file remains connected to that bid unless you save a copy of the workbook – you are then asked if you want to delete the Live Link connection.*



16. Learn more about ConstructConnect Live Link by clicking on **Help** from Excel.

