

Solution Note - Use Data for Estimates

How to track estimating codes with your Touchplan production plan using Touchplan Custom Fields

Problem Statement

Gathering actual data from our projects to compare to our original estimates can be complicated and time consuming. While there will generally be an as-built schedule at the end of the job, it generally will not be broken down in a way that relates back to the groupings that were used during estimating.

Solution

Create a Custom Field for “Estimating Code” and include this information as activities are being planned out. As the tickets are updated and the project is completed, the plans turn into an as-built record of what happened on the job. Because each of the activities will have the appropriate code associated with it, the data can easily be pulled from Touchplan, sorted, and compared against estimated values.

Related Materials

Object	Link	Description
Video	Intro Video	Introduction to Custom Fields
Video	Improving Estimates	Using Custom Fields to Improve Estimates
FAQ	Custom Fields Video	How to Use Custom Fields

Step-by-step instructions

1. Go to the Custom Fields dialog box to add new fields.
 - a. Create custom Text field for “*Estimating* Code” and assign them to the desired roles. The *Estimating* field in the example would be replaced with the coding system you are looking to track. (ex. CSI, Unifomat)

Custom Fields

+ Custom Field All roles

Info Roles

Field Label
CSI Code

Type
Drop-down List
Cannot change type after creation

Drop-down Choices
Choice

092900

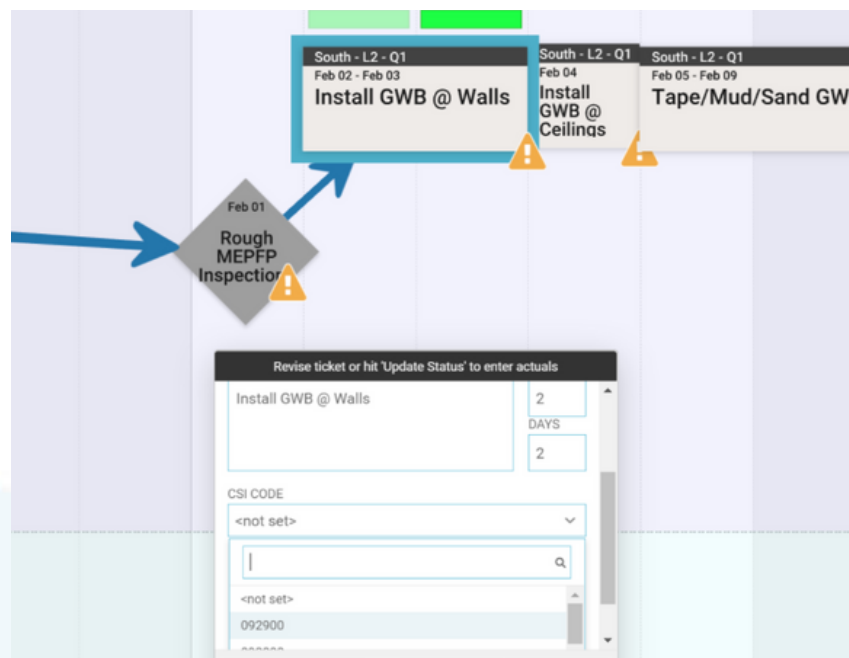
093000

095000

Show on Ticket Form

DISCARD SAVE

3. Create and plan activities following your normal workflow and fill in the “*Estimating* Code” field where appropriate.



4. Continue to follow your normal workflow for updating the status of activities as the project progresses.
5. To review and analyze these new fields, export a plan or project CSV. The data can then be manipulated and analyzed directly within the file, or brought into other platforms that accept CSV files.

Note: Analysis can be done using spreadsheet software.

Help is available

For help with creating custom fields, visit the FAQ here:

[Use Custom Fields | Touchplan.io Help Center](#)

For help exporting a plan or project CSV, visit the FAQ here:

[Export Reports | Touchplan.io Help Center](#)

For live help, click on the “Support” drop down in the top right corner of your planning screen and click the “Live Chat” button. This will connect you to a CS representative who will be able to answer any questions that you may have.

Issues, concerns, defects in this note?

We welcome any feedback you may have on this note to help us continually improve our materials and provide the best support that we can to our customers.

Please send any comments, suggestions, or reports of errors to the CS Live Chat