Right Way Estimator — Frequently Asked Questions

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Short answers to the questions that come up most. The User Guide has the full detail.

Accounts and access

How do I get an account? An Owner invites you under Admin → Users. Sign in with the invited email address.

How can I sign in? Three ways: a passkey (fingerprint, face or device PIN), a password, or a magic link emailed to you. Passkeys are the fastest on a phone.

What is the difference between Owner and Estimator? Owners can do everything, including the Admin Console settings and managing users. Estimators can create and edit projects and estimates but cannot manage users.

Does it work on a phone or tablet? Yes. It runs in any modern browser, and the estimate editor is built to be used on a phone.

Can other companies see my data? No. Every company's projects, customers, price lists and settings are fully separate.

Estimating

Do I need to press Save? No. Line items, job charges, folder labor hours and Settings save automatically about a second after you stop typing. The row's button shows "Saving…" and then "Saved ✓". The Save button is still there if you prefer to use it.

Why did the labor hours change when I changed the quantity? Labor is entered as hours per unit. Total hours are hours per unit × quantity (× the difficulty factor), so they follow the quantity. Each labor line shows its own total next to it.

Is margin the same as markup? No. The app uses margin: sell = cost ÷ (1 − margin). A $100 cost at 35% margin sells for $153.85. A 35% markup would be $135. This is the most common reason a total differs from an older spreadsheet.

What does the difficulty factor do? It multiplies labor hours on a line (1.0 = normal, 1.25 = 25% more hours). Set it per line, per project, or company-wide in General settings; the most specific one wins.

Where do Misc Materials and Warranty come from? They are automatic percentages from General settings: misc materials is a percent of material sell, warranty is a percent of labor sell. They show on the totals and the job summary report, and are included in each folder's subtotal on the proposal.

What are job charges measured against? Percent-based charges (such as Freight or Travel) are a percent of your material or labor cost, then marked up by their own margin. Fixed charges are a dollar amount, then marked up.

Why did new folders get Freight, Misc and Travel on their own? Those job charges are marked Auto-add. Turn Auto-add off, or add your own, under Admin → Job Charges. It affects new folders only.

Does copying a folder duplicate the auto-added charges? No. A copy carries over exactly the charges the original folder has, so you never get doubles.

What happens to items that are not in a folder? They are treated as part of the first folder. Every estimate always has at least one folder.

How do I import a vendor quote? Use Import Vendor Quote (CSV) in the estimate editor. The file needs a header row; names like Description, Qty and Unit Price are recognized. Review and edit the rows before adding them.

What is Goal Seek? It solves for the single blended margin that would hit a target total, so you can see what margin a number requires.

New projects and load calculations

What do I need to enter for a new site? A street address, city, state and ZIP. All four are required, so every project has a complete address for the proposal.

Do I have to pick the county? No. State and county fill in automatically from the site address, and in North Carolina the county sets the sales tax rate. You can still change them on the project's Info tab. Counties outside North Carolina are not filled in, because the app only carries NC county tax rates.

What does Create estimate from load calc build? A complete starting estimate, not just the service. It builds service equipment, branch circuits sized from the loads you entered, wiring and devices, lighting, backup power, mileage-based travel and any permit fee. Each area gets its own folder. Review it and adjust any line.

Where do the room and wire assumptions come from? The Estimating Assumptions & Allowances section on the Load Calc tab: bedrooms, rooms, bathrooms, garages, receptacles per room, wire feet per point, switch counts, furnace, well pump, generator and battery, fixture allowance, permit and mileage. Save the load calc, then create the estimate.

Will my Foreman, Helper and Project Manager labor come over? Yes. Each line carries its material's own labor breakdown, so labor is priced by category. If a material has no breakdown, it falls back to its standard labor hours at the company labor rate. Project management time is already inside each material's Project Manager labor, so it is not added a second time.

How do I add an allowance for a customer? In Customer allowances & assumptions on the Load Calc tab, add a row with a label and, if it is a dollar allowance, an amount. A row with an amount becomes a priced Allowance line. Every row is listed under Assumptions & allowances in the proposal's scope of work.

How is travel calculated on a load calc estimate? Trips are total labor hours divided by 8, rounded up. Travel is trips times your round-trip mileage times the mileage rate in Settings, added as a fixed charge. A permit fee is passed through at cost with no margin and no tax.

I changed the assumptions after creating the estimate. Does it update? No. Create estimate from load calc builds a new estimate each time, so change the assumptions first, or edit the lines on the estimate directly.

Folders, alternates and packages

What is an Add / Alternate folder? Optional work you price separately. Tick Add / Alternate on the folder. It is left out of the base total, shown as "Add/Alternates (not in total)", and listed in its own block on the proposal with its own tax.

I marked a folder as an alternate and the charges in my other folders went down. Why? Percent charges are measured against the base estimate's costs. Moving a folder out of the base shrinks that cost, so percent charges in the remaining folders shrink with it. The alternate's own percent charges are measured against its own costs.

What is a package? A saved bundle of materials, labor, services, test & inspect, subcontractor work or job charges that you add to an estimate in one click. Build them under Admin → Packages.

Labor

What is the difference between a labor category and a labor type? A category is a role with a burdened hourly rate (Foreman, Helper, Project Manager). A type is a premium applied to a rate: a multiplier plus an optional flat hourly add, for overtime, shift differential or holiday. Pick a type on any labor line to bill it at the premium.

Can a part carry its own labor? Yes. On the Material Price List, use Labor breakdown to split a part's labor across your categories. Those lines come along whenever the part is added to an estimate. Parts without a breakdown use their standard labor hours at the company labor rate.

What is the difference between folder labor hours and labor on a line? Line labor belongs to one item and is multiplied by its quantity and difficulty. Folder labor is hours you add to the folder as a whole (hours × company labor rate, then margin, with no difficulty factor).

Sales tax

How is the sales tax rate chosen? North Carolina jobs use the county's combined rate. The county fills in from the site address, and you can change it on the project's Info tab. Other states use their state rate. If neither applies, the fallback rate in General settings is used. The looked-up rate is shown on the Info tab.

Can I tax materials only? Yes. Set the tax basis on the project (or the company default) to "materials only". Labor is then not taxed. You can also mark any individual line, folder labor or job charge as non-taxable.

Does the proposal show tax? Yes. Every pricing breakout shows its own subtotal, sales tax and total, and the folder totals add up exactly to the proposal total.

Proposals and signatures

Which pricing display should I use? Total only for a single lump-sum price; Folder subtotals to show a price per area of work; Folder itemized or Itemized when the customer wants to see the detail. You choose per estimate, and the client link follows your choice.

How do Add / Alternates appear on the proposal? In their own block headed "Add / Alternates", marked as optional and not included in the total above, each with its own tax and total.

How does the customer sign? Copy the Client Link from the proposal and send it. The customer opens it on any device, reviews the proposal and signs on screen with their name. The acceptance (name, time and signature) is saved with the estimate. You can also print the proposal and use the physical signature block.

If I change the estimate after sending the link, does the customer see the change? The link shows the estimate as it currently stands, so tell the customer when you revise numbers.

Can I add my own pages and standard wording? Yes. Proposal Pages hold extra pages (About Us, Past Projects, Team & Certs, anything custom). Standard Clauses hold exclusions, assumptions and notes. Both are managed in the Admin Console, and you choose which to include on each proposal.

Whose name appears as the preparer? The person chosen in Prepared By on the estimate. Their name and title print on the proposal.

How do I get a PDF? Open the proposal and use Print / Save PDF, then choose Save as PDF in your browser's print dialog. Internal controls do not print.

Change orders

Why can't I add a change order? Change orders unlock when the job's status is Won or In Progress. Change the status on the Info tab.

Do change orders get the auto-added charges? No. Job charges attach to estimates, not change orders.

Reports and Excel

How do I get an estimate into Excel? Open the estimate and choose Export to Excel. You get an Estimate sheet (by folder, with tax and totals), a Summary sheet and a Labor detail sheet. Alternates are listed below the base total.

Where is the printable job summary? On the job's Reports tab, choose Print Full Summary Report. It shows labor per line, labor by section, SKUs, Misc Materials and Other Charges. Use the Back to estimate button to return.

Where do I see how the whole business is doing? The Reports page shows won revenue by month, projects by status and job type, top customers and estimated versus actual job costing.

Job tracking

What are Actuals for? Log real labor hours, material and other costs against the job. The Actuals tab compares them with the estimate and shows the variance, which also feeds the business overview.

How do payment milestones work? Add milestones with a label, an amount or percent of the total and a due date. Tick Paid when the money arrives and the date is recorded.

Are documents visible to customers? No. Supporting documents and line-item photos are internal and never print on the proposal.

API and integrations

Can the app connect to other software? Yes, through the public REST API. It reads projects, estimates, customers and the price list, and can create customers and projects and update project status. See the API reference in the User Guide.

Can it push a job into QuickBooks? A direct QuickBooks connection is planned but not built yet. Today a connector tool such as Zapier or Make, or a script, can read estimates from the API and create the records in QuickBooks. The external_refs field on customers and projects stores the QuickBooks IDs so you never push the same job twice.

How do I get an API key? Owners create keys under Admin → API, choosing read-only or read + write. The key is shown once; if you lose it, revoke it and create a new one.

Do the API totals match the app? Yes. The API uses the same pricing math as the app, so an estimate's totals, tax and folder subtotals agree.

Is there a rate limit? Not yet. Please keep integrations to reasonable polling intervals and use the updated_since filter.

Security

How are API keys stored? Only a one-way hash is stored. Anyone with database access still cannot read your key.

Can a key see other companies' data? No. Every request is limited to the company that owns the key.

Troubleshooting

My total does not match my spreadsheet. Check these in order: margin versus markup, the tax basis (total or materials only), the county rate, Misc Materials and Warranty percentages, and any job charges that were auto-added.

Labor shows $0. The labor category has no hourly rate, or the line has no labor category and no standard labor hours. Set rates under Admin → Labor Categories.

The tax rate looks wrong. Open the job's Info tab and check the state and county. They fill in from the site address, but if the address could not be matched the county stays blank and North Carolina jobs fall back to the default rate. Pick the county by hand.

An edit did not stick. Wait for "Saved ✓" on the row before leaving the page, then refresh. If it still does not save, check your internet connection.

The Excel file did not download. Allow downloads for the site in your browser, then try Export to Excel again. On a phone the file appears in your downloads or Files app.