Right Way Estimator — User Guide

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This guide covers everything in Right Way Estimator, from signing in to the public API.

Overview

Right Way Estimator is a web app for electrical contractors. It takes a job from first call to final payment: customer and site, load calculation, estimate, proposal, signature, change orders, job costing and payments.

What it does:

- **Estimates** built from your own price list, labor categories and margins, organized in folders.
- **Load calculations** per NEC 220.82 (optional method) and NEC 220 Part III (standard method), with a printable report.
- **Proposals** with your branding, cover page, scope of work, extra pages, standard clauses and a choice of how pricing is shown.
- **Online acceptance:** send the customer a link; they review and sign on their phone.
- **Add / Alternates:** price optional work separately, with its own tax.
- **Change orders** once a job is won.
- **Job tracking:** documents and photos, actual costs against estimate, payment schedule, activity log and follow-up reminders.
- **Reports** across the whole business and a printable job summary.
- **Excel export** of any estimate.
- **Public API** so other software can read estimates and push jobs in.
- **Multi-company:** every company's data is fully separate.

The app runs in any modern browser on a computer, tablet or phone. Nothing to install.

Getting started

Signing in

The sign-in page offers three ways in: a **passkey** (fingerprint, face or device PIN), a **password**, or a **magic link** emailed to you. You can only sign in with an email address an Owner has invited (Admin → Users).

Roles

Role	Can do
Owner	Everything, including Admin Console settings and managing users
Estimator	Create and edit projects and estimates; cannot manage users

Finding your way around

- **Projects** (home): every job, its status and its value. Click a job to open it.
- **Reports**: business-wide numbers.
- **Admin Console** (your name, top right): all setup pages, listed as tabs across the top.
- **About**: release notes showing what changed and when.

Inside a job, tabs run across the top: **Info, Load Calc, Estimates, Change Orders, Reports, Documents, Actuals, Payments, Activity.**

Theme: light and dark mode are available from the account menu.

Customers and projects

Create a project

1. Go to **Projects** and choose **New Project**.
2. Pick a customer and a site, or add new ones. A project must be tied to one customer and one site. A new site needs a street address, city, state and ZIP; all four are required.
3. Fill in job type, project number, contact phone and email.

Customers and their sites are managed under **Admin → Customers**.

State and county fill in automatically from the site address (looked up with the US Census geocoder). In North Carolina the county sets the sales tax rate. You can change either one on the Info tab, and older NC projects with no county fill in the first time you open them. Changing a project's customer or site refreshes them.

Project status

Every project has one of five statuses: **In Negotiation**, **Won**, **In Progress**, **Lost** or **Void**. The first time you mark a job Won or Lost the date is recorded for reports. Change Orders unlock once the job is Won or In Progress.

Project-level overrides

On the Info tab, leave these blank to use company Settings, or set them for this job only:

- **Difficulty factor:** multiplies labor hours.
- **Material margin** and **Labor margin**.
- **State and county:** sets the sales tax rate. North Carolina jobs use the county's combined rate; other states use their state rate.
- **Tax basis:** tax the total sale price, or materials only.

The looked-up tax rate is shown right under the selection so you can confirm it. Any line in an estimate can still override difficulty and margins again.

Follow-ups

Set a **next follow-up date** and a note. On the Projects page, tick "Needs follow-up only" to list every job whose follow-up date has arrived, so quotes do not go cold.

Notes

Free-text notes for the job. They are internal and never print on a proposal.

Load calculations

The **Load Calc** tab sizes a dwelling's electrical service.

Inputs

Dwelling square footage, small-appliance circuits, laundry circuits, range and dryer demand, water heater, total A/C and heat, other fixed appliances, EV charger and the count of fixed appliances (four or more triggers the 75% factor in the standard method).

Two methods, side by side

- **NEC 220.82, Optional Method:** the quick method for existing dwellings.
- **NEC 220 Part III, Standard Method.**

Press **Calculate** to see both results. Choose the one to use; the result feeds the report.

Report and estimate

- **Load Calculation Report:** a printable, branded report with your company information, for the customer or the inspector.
- **Create estimate from load calc:** builds the full estimate from the load calc and the Estimating Assumptions below: service equipment, branch circuits sized from your loads, wiring and devices, lighting, backup power, mileage-based travel and any permit fee, each in its own folder. Every line is matched from your price list and carries that material's Foreman, Helper and Project Manager labor, so labor is priced by category. Review it, then adjust any line.

Every new estimate created this way also receives your Auto-add job charges (see *Job charges*).

Estimating assumptions and allowances

The Load Calc tab has an Estimating Assumptions & Allowances section. It carries over the assumptions from the original Excel toolkit and drives what Create estimate from load calc builds:

- **Job and building:** job type (new construction, remodel or rewire, service upgrade only), new or existing service, bedrooms, additional rooms, bathrooms, garages, levels, crawlspace or basement, receptacles per room.
- **Wire and counts:** feet of 14/2 per lighting point, feet of 12/2 per receptacle point, service entrance cable run, recessed cans (blank means baths plus 6), under-cabinet kits, and 3-way and 4-way switches with feet of 14/3 per switch.
- **Equipment:** furnace or air handler fan, well pump (with HP), generator and ATS prep, and battery backup, with unit costs entered at estimate time.

- **Fixtures and fees:** whether you supply the owner's fixtures and the per-fixture allowance, the permit fee (passed through at cost, no margin) and round-trip mileage. Travel is trips (labor hours divided by 8, rounded up) times mileage times your mileage rate.

Below the assumptions, add **customer allowances and assumptions**. Each row has a label and an optional dollar amount. A row with an amount becomes a priced Allowance line on the estimate. Every row is also listed under Assumptions & allowances at the top of the proposal's scope of work, along with a summary of the job basis. Save the load calc before creating the estimate.

Building an estimate

Open a job, choose the **Estimates** tab and open an estimate (a job with a single estimate opens it directly). An estimate is a set of **folders**; each folder holds **line items** and **job charges**.

Folders

- Create folders with **+ New Folder** (for example *A. Service Equipment*, *B. Wiring & Devices*). Rename them in place.
- Each folder shows its **cost** and **sale** summary.
- **Copy** a folder to duplicate it with its items, labor and charges.
- **Folder labor hours:** add labor to a folder directly, separate from any line (hours × your burdened labor rate, then margin; not multiplied by difficulty).
- **Add / Alternate:** tick this on a folder to price it as optional work. It is left out of the base total, shown under *Add/Alternates (not in total)*, and listed separately on the proposal with its own tax.
- Drag line items to reorder them or move them between folders.

Line items

Add items from the **Add Items** menu: materials from your price list, one-time items, catalog items (labor, services, test and inspect, subcontractors), packages, or a vendor quote. Each line has:

Field	Meaning
Qty	Quantity
Unit cost	Your cost per unit
Difficulty	Multiplier on this line's labor hours (blank = project or company default)
Mat margin % / Labor margin %	Margins used to mark cost up to sell (blank = default)
Taxable	Include or exclude this line from sales tax

Labor on a line

Each line can split its labor across **labor categories** (for example Foreman, Helper, Project Manager). Enter **hours per unit**; the line shows the total for the quantity next to each category (hours per unit × qty). Pick a **labor type** (overtime, holiday, shift differential) per labor line to bill it at a premium. Change the quantity and every hour figure, the line price and the folder and estimate totals update instantly.

Materials from your price list bring their own labor breakdown with them when added.

Autosave

Edits save by themselves about a second after you stop typing. The row's button shows *Saving…* then *Saved ✓*. The Save button is still there if you want to save by hand. You do not need to press anything before leaving.

Job charges

Fees and surcharges added per folder: a **fixed dollar amount**, a **percent of material cost** or a **percent of labor cost**, each with a margin and a taxable flag. Items marked **Auto-add** in the Admin Console (Freight, Misc and Travel by default) are added automatically to every new folder. Copying a folder does not duplicate them. Percent charges are measured against **cost**, then marked up by their margin.

Import a vendor quote

Import Vendor Quote (CSV) reads a quote with a header row (Description, Qty, Unit Price and similar names are recognized). Review and edit the rows, choose the folder, and add them.

Goal seek

Enter a target and Goal Seek solves for one blended margin across every line, so you can see what margin hits a number.

Scope of work and preparer

Write the **Scope of Work** in the rich-text editor (you can paste photos straight in). Choose the **Prepared By** person; their name and title print on the proposal.

Totals bar

The totals bar shows material, labor and hours, misc materials, warranty, job charges, tax, total, add/alternates, estimated profit and margin, live as you edit.

Proposals

Open **View Proposal** on the job, or **Proposal** next to an estimate. A **← Back to estimate** button at the top returns you to the estimate (it does not print).

What a proposal contains

A branded cover page, the scope of work, pricing, optional extra pages, standard clauses, terms and conditions, and a signature block.

Pricing display

Choose how much pricing the customer sees:

Mode	Shows
Total only	One total price
Folder subtotals	A price per folder
Folder itemized	Each folder with its lines

Mode	Shows
Itemized	Every line item

Every breakout carries its own **subtotal, sales tax and total**, and the folder figures add up exactly to the proposal total. Folders flagged Add / Alternate appear in a separate **Add / Alternates** block: optional work, priced separately and not included in the total above.

Extra pages and clauses

Tick which **Proposal Pages** (About Us, Past Projects, Team & Certs, anything custom) and which **Standard Clauses** (exclusions, assumptions, notes) to include. Clauses default on or off, and you can flip any for this job.

Print or save as PDF

Print / Save PDF produces a clean printout. Internal controls do not print.

Online acceptance

Copy Client Link gives a private link. The customer sees the proposal in their browser, enters their name and signs on screen. The acceptance (name, time and signature) is saved with the estimate. The link follows the pricing display you chose and uses the job's own tax rate. Prefer paper? Print it; there is a physical signature block.

Change orders

Change orders are for work added or changed after the customer says yes. The **Change Orders** tab unlocks when the job is marked **Won** (or In Progress).

1. Choose **+ New Change Order** and give it a title.
2. Choose **+ Add Items** and add materials, labor, services and more, the same way as an estimate.
3. Open the change order's **Proposal** to print it or review it with the customer.

Change orders have their own line items and totals, with tax applied the same way. They appear next to estimates in the project summary so the job's full value is always visible. Job charges attach to estimates only, not to change orders.

Reports and exports

Project summary (Reports tab)

Shows each estimate and change order with material, labor, charges, tax, total, cost and margin. **Print Full Summary Report** opens a printable job summary: labor per line item, labor breakdown by section, material SKUs, Misc Materials and Other Charges. A **← Back to estimate** button returns you to the job.

Business overview (Reports page)

Business-wide numbers across every project: won revenue by month, projects by status, by job type, top customers, and **Job Costing — Estimated vs. Actual**.

Export an estimate to Excel

In the estimate editor choose **Export to Excel**. You get a workbook with three sheets:

Sheet	Contents
Estimate	Each folder with line items, material and labor cost, margins, sell, taxable flag, folder labor, charges, misc, warranty, tax and totals. Alternates appear below the base total.
Summary	Material, labor, hours, charges, subtotal, tax, total, cost and profit
Labor detail	Hours and cost by labor category for every line

The file is named after the customer and estimate number.

Tracking a job

Documents

Upload vendor quotes, permit documents, site photos or anything else worth keeping with the job. Documents are internal and never show on the proposal. You can also attach photos to an individual line item with the camera button on its row.

Actuals (job costing)

Log what the job really cost: choose a date and a kind (**Labor, Material or Other**), the labor category and hours for labor, and the amount. The tab compares **Estimated Cost** to **Actual Cost** and shows the variance. The same comparison rolls up into the business overview.

Payments

Build a **Payment Schedule** with **+ Add Milestone**: a label, an amount or percent of the total, a due date and a paid checkbox. Ticking Paid records when.

Activity log

Every meaningful change is recorded with who made it and when: status changes, item edits and deletions, payment updates, and changes made through the API. Use it as the audit trail for the job.

Admin console

Open the Admin Console from your name (top right). Every setup page is a tab across the top. Settings save automatically as you type.

Tab	What it controls
General	Burdened labor rate, default difficulty, default material and labor margins, misc materials % (of material sell), warranty % (of labor sell), fallback tax rate, default tax basis, circuit-length assumptions for load calcs, default payment terms, Terms & Conditions, and the table of North Carolina county tax rates
Branding	Company name, address, license, logo, brand colors, cover tagline, contact details, proposal validity days

Tab	What it controls
Material Price List	Your parts with SKU, unit cost, standard labor hours and taxable flag. Import a parts CSV. **Labor breakdown** splits an item's labor across your labor categories, and that split is copied onto every estimate line when the part is added
Labor Categories	Each category's burdened hourly rate (Foreman, Helper, Project Manager, Installation, Programming and so on). **Breakdown** builds the rate from base wage, payroll tax, workers' comp, insurance and benefits
Labor Types	Premiums stacked on a category rate: a multiplier plus an optional flat hourly add (overtime, shift differential, holiday)
Labor, Services, Test & Inspect, Subcontractors	Catalogs of non-material items you can add to an estimate in one click
Job Charges	Fees and surcharges: fixed, % of material cost or % of labor cost, each with margin, taxable, active and **Auto-add** (added to every new folder)
Packages	Bundles of materials, labor, services, test & inspect, subcontractor work or job charges added to an estimate in one click
Standard Clauses	Exclusions, assumptions and notes for proposals; each defaults on or off
Proposal Pages	Extra pages (About Us, Past Projects, Team & Certs, custom). Drag to set the print order
Customers	Customers and their sites
Users	Invite users, set Owner or Estimator, see pending invites
API	Create and revoke API keys (see *API reference*)

Tab	What it controls
Companies	Visible to platform administrators only: create and manage companies

Recommended setup order

1. Branding and General settings.
2. Labor categories (and labor types if you bill premiums).
3. Material price list, with labor breakdowns on your common parts.
4. Job charges; mark Freight, Misc and Travel (or your own) as Auto-add.
5. Packages, standard clauses and proposal pages.
6. Invite your team.

How pricing is calculated

The app, the proposal, the Excel export and the API all use the same math.

Quantity	Formula
Sell from cost	cost ÷ (1 − margin). A margin of 100% or more is treated as 99%.
Material cost	qty × unit cost
Material sell	material cost ÷ (1 − material margin)
Labor hours (per labor line)	qty × hours per unit × difficulty factor
Labor rate	category burdened rate × type multiplier + type flat hourly add
Labor cost	labor hours × labor rate, summed over the lines
Labor sell	labor cost ÷ (1 − labor margin)
Folder labor	hours × company burdened labor rate, then margin (no difficulty factor)
Misc materials	material sell × misc materials %
Warranty	labor sell × warranty %

Quantity	Formula
Job charge (fixed)	amount, then margin
Job charge (percent)	amount % × material cost or labor cost of the base estimate, then margin
Subtotal	material sell + labor sell + misc + warranty + charges sell
Sales tax	taxable base × tax rate
Total	subtotal + sales tax
Estimated profit	(material + labor + charges sell) − (material + labor + charges cost)

Defaults cascade: a line's own difficulty and margins win, then the project's, then the company's General settings. A line with no per-category labor uses its standard labor hours at the company burdened labor rate.

Sales tax

- **Rate:** North Carolina jobs use the county's combined rate; other states use their state rate; if neither applies, the General settings fallback is used.
- **Basis — total:** taxable material, taxable labor, misc, warranty and taxable charges.
- **Basis — materials only:** taxable material, misc on it, and taxable charges (labor is not taxed).
- A line, folder labor or job charge marked not taxable is left out of the base.

Add / Alternates

An alternate folder is priced on its own, including its own tax, and percent charges inside it are measured against that folder's own costs. Marking a folder as an alternate removes its costs from the base estimate, so percent charges in the remaining folders shrink to match.

API reference

The API lets other software read estimates and push jobs in, for example a QuickBooks connector, Zapier or Make, or your own scripts.

Base URL: `https://estimator.dirtymaxjack.com/api/v1`

Authentication

Create a key under **Admin → API**. Choose read-only or read + write. The key is shown once; only a hash is stored, so a lost key must be replaced. Send it on every request:

```
Authorization: Bearer rwe_YOUR_KEY
```

Revoke a key at any time on the same page; it stops working immediately. A key only ever sees its own company's data.

Endpoints

Method and path	Access	Purpose
GET /projects	read	List projects. Filters: status (comma-separated), customer_id, updated_since (ISO time), q (customer name or project number)
GET /projects/{id}	read	One project with its estimates, tax rate and totals
POST /projects	write	Create a project. Send customer_id or customer_name, plus any project fields
PATCH /projects/{id}	write	Update fields, change status, merge external_refs
GET /projects/{id}/estimates	read	Full estimates for a project
GET /estimates	read	List estimates with totals. Filters: project_id, updated_since
GET /estimates/{id}	read	Full estimate: folders, items, labor by category, charges, tax, totals, proposal link
GET /customers	read	List customers (q, limit, offset)
GET /customers/{id}	read	One customer
POST /customers	write	Create a customer (name required)
PATCH /customers/{id}	write	Update a customer
GET /materials	read	Material price list (q, limit, offset)

Method and path	Access	Purpose
GET /openapi.json	none	Machine-readable endpoint summary

List endpoints take `limit` (default 50, maximum 200) and `offset`, and return `{ data, total, limit, offset }`.

Project fields

project_number, customer_name, customer_address, customer_phone, customer_email, job_type, notes, county, state, next_follow_up_at, follow_up_note, status. Status is one of `in_negotiation`, `won`, `in_progress`, `lost`, `void`.

The estimate object

`GET /estimates/{id}` returns the estimate with `tax_rate`, `proposal_url`, `accepted_at`, a `totals` object (material_sell, labor_sell, labor_hours, misc_materials, warranty, charges, subtotal, tax, total, total_cost, profit, alternates_total, alternates_count) and a `folders` array. Each folder has `is_alternate`, its own `totals` (subtotal, tax, total), `items` (quantity, unit cost, material and labor cost and sell, and a `labor` array by category and type), optional folder `labor`, and `charges`. All money is in dollars.

Linking records to other systems

Customers and projects carry an `external_refs` object for IDs from other systems. Send `{"external_refs": {"quickbooks_customer_id": "58"}}` to add or change a key; the object is merged, and a key set to `null` is removed. Use it so a sync can tell which records it has already pushed.

Examples

```
# Won jobs updated since a date
curl "https://estimator.dirtymaxjack.com/api/v1/projects?
status=won&updated_since=2026-11-01" \
  -H "Authorization: Bearer rwe_YOUR_KEY"

# Create a customer
curl -X POST "https://estimator.dirtymaxjack.com/api/v1/customers" \
  -H "Authorization: Bearer rwe_YOUR_KEY" -H "Content-Type: application/json"
\
  -d '{"name":"Smith Residence","email":"smith@example.com"}'

# Mark a project won
curl -X PATCH "https://estimator.dirtymaxjack.com/api/v1/projects/PROJECT_ID"
\
  -H "Authorization: Bearer rwe_YOUR_KEY" -H "Content-Type: application/json"
\
  -d '{"status":"won"}'
```

Errors

Errors return `{ "error": { "code", "message" } }`. Codes: `unauthorized` (401, missing or bad key), `read_only_key` (403), `invalid` (400), `not_found` (404), `server_error` (500).

Not included yet

Creating or editing estimate line items through the API, outgoing notifications when a job is won, and rate limits are not available yet. A direct QuickBooks connection is planned.