

TradeQuote Pro  
Power User Course  
Learner Course Guide

Website/download based training resource

### Built from practical construction experience

This course is designed to help TradeQuote Pro users learn a clear workflow from quote request and drawing takeoff through to quote, milestones, sustainability notes, risk assessment, method statement, invoice and payment planning.

Course detail	Information
Course name	TradeQuote Pro Power User Course
Certificate name	TradeQuote Pro Power User Certificate of Completion
Delivery method	Website/download based course pack. The course is not built into the app.
Suggested level	Beginner to intermediate TradeQuote Pro users
Main practical exercise	Garage/Gym and Dining Area Drawing Takeoff using the supplied proposed floor plan and elevations
Draft date	06 June 2026

### Important certificate wording

This course supports CPD evidence and practical software training. It is not an accredited construction qualification, formal estimating qualification, health and safety qualification, or proof of professional competency.

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## 1. About this course

The TradeQuote Pro Power User Course is a practical website/download based training resource. It helps learners understand how to use TradeQuote Pro as part of a complete construction estimating and job documentation workflow, including sustainability notes.

The course uses a real drawing-based training exercise. Learners download the proposed floor plan and proposed elevations, import them into TradeQuote Pro, calibrate the drawing, measure key items, save measurements to the Takeoff Notepad and use the results to build a practice quote and milestone plan.

### Course boundary

This course is not built into the TradeQuote Pro app. The app remains the estimating and documentation tool. The course materials live on the website as downloadable learner resources.

### Who the course is for

- Small builders and contractors who want a clearer estimating workflow.
- Apprentices and construction students developing digital construction and estimating skills.
- TradeQuote Pro users who want to understand the complete workflow rather than only individual screens.
- Learners who want CPD-style evidence of practical software training and estimating practice.

### What learners will complete

- ☐ A practice quote request and project setup activity.
- ☐ Drawing takeoff exercises using the supplied proposed floor plan and elevations.
- ☐ Calculator and material quantity checks.
- ☐ A practice task breakdown and draft quote.
- ☐ A milestone and stage payment plan.
- ☐ Sustainability notes, a risk assessment and method statement activity.
- ☐ An invoice or staged payment example.
- ☐ A completion checklist and short CPD reflection.

## 2. How to use the course pack

Work through the modules in order. The modules are written to follow a realistic workflow: enquiry, quote request, customer, project, drawing takeoff, calculations, quote, milestones, sustainability notes, health and safety documents, invoices and completion.

### Recommended learner process

- ☐ Download the course guide and drawing files.
- ☐ Read the training scenario before opening TradeQuote Pro.
- ☐ Create a training customer and project in TradeQuote Pro.
- ☐ Import the proposed floor plan into Drawing Takeoff.
- ☐ Calibrate the drawing using a known figured dimension.
- ☐ Measure and save named items to the Takeoff Notepad.
- ☐ Use the measurements to create project tasks and a draft quote.
- ☐ Create a milestone/stage payment plan.
- ☐ Prepare supporting sustainability notes, risk assessment and method statement notes.
- ☐ Complete the final reflection and completion checklist.

#### Training-only reminder

The course uses fictional training details. Learners must always check real drawings, site conditions, supplier prices, labour rates, legal requirements and customer agreements before using information on a live project.

## 3. Course files and drawing downloads

The course is designed to be downloaded from the website. The following files should be included in the website download pack once all course resources are complete.

File	Purpose	Use
TradeQuote-Pro-Power-User-Course-Guide.pdf / DOCX	Main learner guide and course manual.	Read and work through in order.
TradeQuote-Pro-Training-Drawing-01-Proposed-Floor-Plan.pdf	Main drawing used for calibration and takeoff.	Import into TradeQuote Pro Drawing Takeoff.
TradeQuote-Pro-Training-Drawing-02-Proposed-Elevations.pdf	Elevation drawing used to identify openings, roof forms and project features.	Use for task descriptions, roof/opening awareness and milestone planning.
TradeQuote-Pro-Practical-Exercise-01.pdf	Detailed learner exercise for the garage/gym and dining area project.	Complete alongside Modules 3 to 7.
TradeQuote-Pro-Answer-Check-Sheet.pdf	Expected measurements, assumptions and example working.	Use after attempting the exercise.

File	Purpose	Use
TradeQuote-Pro-Certificate-Template.pdf / DOCX	Certificate of Completion template.	Complete after finishing the course.
TradeQuote-Pro-Completion-Checklist.pdf	Final learner sign-off and CPD reflection sheet.	Complete at the end of the course.

## 4. Module overview

Module	Title	Main learning focus
1	Introduction to TradeQuote Pro and construction estimating	Understand the full workflow from enquiry to quote, milestones, invoice and payment.
2	Company setup and professional settings	Set up business details, tax settings, terms and document information.
3	Quote requests, customers and project setup	Turn an incoming quote request into a customer record and project.
4	Drawing takeoffs from example drawings	Measure lengths, areas and counts from the supplied training drawings.
5	Calculators and material quantities	Use measured values to calculate materials and quantities.
6	Building a quote from the quote request	Create tasks, costs and a professional customer quote.
7	Milestones, staged work and payment planning	Break work into stages and link them to payment planning.
8	Sustainability, risk assessments and method statements	Create sustainability notes and supporting health and safety documents for the project.
9	Completed quotes, invoices, payments and job completion	Understand completed quote records, invoices, stage payments and payment records.
10	Final practical exercise	Complete the full course scenario from quote request to final documents.
11	Completion checklist, reflection and certificate	Confirm completion and prepare CPD-style reflection evidence.

## Module 1: Introduction to TradeQuote Pro and construction estimating

### Purpose

This module explains the purpose of the course and shows how estimating, quote requests, quotations, milestones and project documentation fit together in a real construction workflow.

### By the end of this module, the learner should be able to:

- Explain the difference between an enquiry, a quote request, an estimate, a quotation and an invoice.
- Describe why accurate measurement, labour allowances, material pricing, waste, markup and staged payment planning matter.
- Identify the main TradeQuote Pro workflow from quote request through to milestones, quote, invoice and payment.

### Learner activities

- ☐ Read the course introduction and save certificate wording.
- ☐ Review the example training scenario used throughout the course.
- ☐ Make notes on current estimating confidence and areas for improvement.

### Course output

Short learner notes or CPD reflection on current estimating confidence, quote request handling and development aims.

## Module 2: Company setup and professional settings

### Purpose

This module shows how a professional quoting system starts with correct business details, tax settings, terms, payment details and document settings.

### By the end of this module, the learner should be able to:

- Set up company details, logo, contact information and bank/payment details.
- Select the correct currency, units, VAT/tax approach and quote validity settings.
- Explain how good setup improves quote requests, quotes, invoices and customer documents.

### Learner activities

- ☐ Complete a company setup checklist.
- ☐ Review example terms, payment wording and professional document settings.
- ☐ Check backup and iCloud Sync guidance without changing app data unnecessarily.

### Course output

Completed company setup checklist and screenshot/note confirming key settings have been reviewed.

## Module 3: Quote requests, customers and project setup

### Purpose

This module teaches learners how to handle an incoming quote request, create the correct customer record and set up the project before pricing work.

**By the end of this module, the learner should be able to:**

- Record or review a quote request with clear customer and job information.
- Create a customer record with relevant contact and address information.
- Create a project/job linked to the correct customer and quote request.
- Use project status, project notes, site records and variations to keep job information organised.

### Learner activities

- ☐ Create a training customer called Training Client.
- ☐ Create a project called Garage/Gym and Dining Area Training Project.
- ☐ Record the quote request as a request for a garage/gym, dining area replacement, structural opening and supporting documents, including sustainability notes.
- ☐ Identify what drawings, dimensions, documents and follow-up information are needed before pricing.

### Course output

Practice quote request, customer and project created from the course scenario, with a short job brief and information checklist.

## Module 4: Drawing takeoffs from example drawings

### Purpose

This module uses supplied drawings to practise digital measurement and show how takeoff information feeds the estimate.

**By the end of this module, the learner should be able to:**

- Import or view example drawings and understand why calibration matters.
- Measure lengths, areas and counts from a drawing.
- Use the Takeoff Notepad to store named measurements before using them in project pricing.
- Recognise that drawing measurements must be checked before pricing.

### Learner activities

- ☐ Import the proposed floor plan into TradeQuote Pro Drawing Takeoff.
- ☐ Calibrate the drawing using a figured dimension such as 4.955 m or 7.500 m.
- ☐ Measure the garage/gym footprint, dining area footprint and structural opening.
- ☐ Use the elevations to identify openings, roof forms and external work items.
- ☐ Save all important measurements to the Takeoff Notepad using clear names.

### Course output

Completed takeoff worksheet showing named measurements, units and assumptions.

## 9. Practical Exercise 01: Garage/Gym and Dining Area

### Drawing Takeoff

This is the first main practical exercise in the course. It uses the proposed floor plan and proposed elevations as real drawing-based training resources. The learner imports the drawings into TradeQuote Pro, takes measurements, saves named items to the Takeoff Notepad and uses the results to build a simple quote and milestone plan.

Exercise detail	Information
Course section	Drawing takeoff, quote requests, project setup, milestones and quotation workflow
Drawing files needed	TradeQuote-Pro-Training-Drawing-01-Proposed-Floor-Plan.pdf TradeQuote-Pro-Training-Drawing-02-Proposed-Elevations.pdf
Suggested level	Beginner to intermediate
Estimated time	45 to 90 minutes depending on confidence with drawing takeoff
Main output	Saved measurements, task list, draft quote, milestone plan and short learner reflection

### Training scenario

A fictional training client has asked for a quotation for a single-storey garage/gym to the rear of a property and a single-storey dining area to replace an existing conservatory. The drawing pack includes a proposed floor plan and elevations. The learner must use the drawings to set up the project, measure key areas, prepare basic task items and create a milestone plan.

#### Training-only statement

Names, project details and any pricing used by the learner are for practice and CPD-style learning. The completed work is not a formal construction qualification or proof of professional competency.

### Known dimensions to use for checking

Dimension shown	Metric value	Suggested use
Garage/gym width shown on plan	4.955 m	Good calibration check for the garage/gym area.
Garage/gym length shown on plan	7.500 m	Useful for checking the garage/gym footprint.

Dimension shown	Metric value	Suggested use
Dining area width shown on plan	2.680 m	Useful for checking the dining area measurement.
Dining area depth shown on plan	4.300 m	Useful for checking the dining area footprint.
Structural opening shown on plan	3.999 m	Useful for recording a separate opening or structural task.

## Exercise steps

### Part 1 - Set up the practice project

- ☐ Create a customer called Training Client.
- ☐ Create a project called Garage/Gym and Dining Area Training Project.
- ☐ Add a project note explaining that this is a training exercise from supplied drawings.
- ☐ Record the quote request as a request for a garage/gym, dining area extension, structural opening and supporting project documents, including sustainability notes.

### Part 2 - Import and calibrate the floor plan

- ☐ Open Drawing Takeoff in TradeQuote Pro.
- ☐ Import TradeQuote-Pro-Training-Drawing-01-Proposed-Floor-Plan.pdf.
- ☐ Use a known figured dimension, such as 4.955 m or 7.500 m, to calibrate the drawing.
- ☐ Zoom in and check the measurement against a second known dimension before continuing.
- ☐ Save a note stating which dimension was used for calibration.

### Part 3 - Measure the garage/gym area

- ☐ Measure the garage/gym external length.
- ☐ Measure the garage/gym external width.
- ☐ Measure or calculate the garage/gym footprint area.
- ☐ Save the result to the Takeoff Notepad using a clear name such as Garage/Gym floor area.
- ☐ Record whether the measurement is internal, external or approximate.

### Part 4 - Measure the dining area and structural opening

- ☐ Measure the dining area width and depth.
- ☐ Calculate or measure the dining area footprint area.
- ☐ Record the structural opening as a separate measured item.
- ☐ Save these values to the Takeoff Notepad using clear names.
- ☐ Add a note that structural work should be checked by the appropriate designer/engineer before construction.

### Part 5 - Use the elevations

- ☐ Identify the proposed garage/gym elevations.
- ☐ Identify the proposed dining area elevations.

- ☐ Count or note major openings such as the new double garage door, doors, windows and roof windows.
- ☐ Note the roof form and any areas that may need a roof or external works allowance.
- ☐ Use the elevation information to improve the task descriptions in the quote.

## Suggested task breakdown

- ☐ Preliminaries / site setup.
- ☐ Garage/gym foundations and floor slab.
- ☐ Garage/gym walls and openings.
- ☐ Garage/gym roof and roof windows.
- ☐ Dining area foundations and floor slab.
- ☐ Dining area walls, roof and structural opening.
- ☐ Making good, waste removal and final checks.

## Module 5: Calculators and material quantities

### Purpose

This module shows how calculators support quantity checks and help learners turn measurements into useful construction quantities.

**By the end of this module, the learner should be able to:**

- Use relevant calculators such as brick/block, roof, foundation, concrete, stud wall and fascia where appropriate.
- Explain how measurement values, waste allowances and material units affect calculated quantities.
- Transfer useful calculated quantities into the project workflow.

### Learner activities

- ☐ Use measured values from Practical Exercise 01 in at least two calculators.
- ☐ Record calculator inputs, outputs and assumptions.
- ☐ Compare outputs against expected ranges in the answer/check sheet when available.
- ☐ Note where supplier prices, labour rates, waste and markup may vary.

### Course output

Calculator worksheet showing inputs, outputs, assumptions and checks.

## Module 6: Building a quote from the quote request

### Purpose

This module brings together the quote request, measured work, tasks, materials, labour, travel, sustainability notes, markup and VAT/tax to create a professional quote.

**By the end of this module, the learner should be able to:**

- Turn the quote request and takeoff information into clear project tasks.
- Create project tasks with clear descriptions, materials, labour, travel, sustainability notes and general notes.
- Apply markup and VAT/tax settings appropriately.
- Preview a professional quote and check that it answers the original quote request.

### Learner activities

- ☐ Create a task for each main part of the practice job.
- ☐ Add labour, material and sustainability notes using realistic example figures.
- ☐ Check the quote against the original quote request and drawing information.
- ☐ Preview the quote and check wording, totals and customer-facing details.

#### Course output

Practice quote preview or PDF produced from the course scenario, clearly linked back to the quote request.

## Module 7: Milestones, staged work and payment planning

### Purpose

This module shows how milestones help break a project into clear stages, support customer communication and prepare for staged invoices or payment tracking.

**By the end of this module, the learner should be able to:**

- Explain what milestones are and why they are useful on construction jobs.
- Create a simple milestone plan for the practice project.
- Link milestones to staged work, stage payment thinking or invoice planning where appropriate.
- Recognise that milestone wording should be clear, realistic and understandable to the customer.

### Learner activities

- ☐ Break the practice project into clear stages such as setup, foundations, structure, roof/external works and completion.
- ☐ Create milestone descriptions using plain customer-friendly wording.
- ☐ Decide whether any milestone should connect to a stage payment or invoice point.
- ☐ Review the milestone plan for clarity and realism.

#### Course output

Milestone plan for the practice project, including stage descriptions and any example stage payment/invoice points.

### Example milestone plan

Stage	Suggested milestone	Example payment point
1	Quote accepted and job booked in	10% booking / acceptance stage
2	Groundworks, foundations and slab complete	25% stage payment
3	Main structure and openings complete	30% stage payment
4	Roof, external works and making good	25% stage payment

Stage	Suggested milestone	Example payment point
	complete	
5	Final completion and handover	10% final payment

These percentages are only an example for training. Real stage payments must be agreed clearly with the customer and must match the contractor's own terms and any relevant legal requirements.

## Module 8: Sustainability, risk assessments and method statements

### Purpose

This module shows how project information can support professional health and safety documentation.

**By the end of this module, the learner should be able to:**

- Identify common hazards and control measures linked to the practice project.
- Create a risk assessment using the project information.
- Create a method statement that matches the task sequence, milestones and working method.
- Understand that generated documents must still be reviewed by a competent person.

### Learner activities

- ☐ Select hazards and controls for the example job.
- ☐ Produce a practice risk assessment.
- ☐ Produce a practice method statement and check that it matches the work described and the milestone sequence.
- ☐ Review the documents and add any missing project-specific notes.

### Course output

Practice sustainability notes, risk assessment and method statement created for the scenario.

## Module 9: Completed quotes, invoices, payments and job completion

### Purpose

This module explains how completed quotes, invoices, stage payments, milestones and payment tracking support the business side of a job.

**By the end of this module, the learner should be able to:**

- Explain the difference between a quote, an accepted job, an invoice, a stage invoice and a payment record.
- Create or review invoice stages where relevant to the milestone plan.
- Record payment progress and understand why accurate records matter.
- Review completed quote information so the job record is clear.

### Learner activities

- ☐ Review the completed quote workflow.
- ☐ Create an example invoice or staged invoice plan linked to the milestones.
- ☐ Record a sample payment and review job completion notes.

- ☐ Check that the completed quote and payment information is understandable.

### Course output

Example completed quote, invoice/stage payment record, payment note and short completion note.

## Module 10: Final practical exercise: complete job workflow

### Purpose

This module brings the whole course together through one complete realistic exercise from quote request and drawings to final documents.

### By the end of this module, the learner should be able to:

- Complete a full estimating workflow using a supplied quote request, drawings and project information.
- Produce a quote, milestone plan, sustainability notes, risk assessment, method statement and invoice/payment plan.
- Review the final output for accuracy, professionalism and customer clarity.

### Learner activities

- ☐ Start from the supplied quote request.
- ☐ Create the customer and project.
- ☐ Measure from the supplied drawing pack.
- ☐ Use calculators where appropriate.
- ☐ Build tasks and produce the quote.
- ☐ Create a milestone plan and staged payment example.
- ☐ Create supporting health and safety documents.
- ☐ Create an invoice or stage payment example.

### Course output

Final course project pack: quote request notes, takeoff notes, task breakdown, milestone plan, quote, sustainability notes, risk assessment, method statement and invoice/payment example.

## Module 11: Completion checklist, reflection and certificate

### Purpose

This module confirms completion of the course and captures CPD-style reflection without claiming formal accreditation.

### By the end of this module, the learner should be able to:

- Check that all required course tasks have been completed.
- Reflect on what has been learned and how it could be used in construction practice.
- Understand the purpose and limits of the Certificate of Completion.

### Learner activities

- ☐ Complete the learner completion checklist.
- ☐ Write a short CPD reflection.

- ☐ Request the TradeQuote Pro Power User Certificate of Completion after completing the course activities, practical exercise, checklist and reflection.

### Course output

Signed/dated completion checklist, CPD reflection and certificate of completion.

## 17. Learner reflection and completion checklist

The completion checklist helps the learner confirm that they have worked through the practical course activities. It is not an assessment for a formal qualification.

### Course completion checklist

- ☐ I have read the course introduction and certificate wording.
- ☐ I have created a training customer and project in TradeQuote Pro.
- ☐ I have recorded or reviewed the practice quote request.
- ☐ I have imported the proposed floor plan into Drawing Takeoff.
- ☐ I have calibrated the drawing using a figured dimension.
- ☐ I have saved named measurements to the Takeoff Notepad.
- ☐ I have reviewed the proposed elevations and identified key openings and roof/external work items.
- ☐ I have created a task breakdown for the training project.
- ☐ I have created a draft quote or quote preview.
- ☐ I have created a milestone/stage payment plan.
- ☐ I have created or reviewed sustainability notes, risk assessment and method statement content for the training project.
- ☐ I have created an invoice or staged payment example.
- ☐ I have completed a short reflection.

### Learner reflection questions

Which dimension did you use to calibrate the drawing?

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Which measurement was easiest to complete?

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Which measurement or task needed the most checking?

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What assumptions and sustainability considerations did you make before creating the quote?

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How did the elevations help you understand the project?

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How could milestones help explain the job to a customer?

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What would you check before using this process on a live project?

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## 18. Certificate request instructions

The Certificate of Completion is issued manually after the learner has completed the course activities. The editable certificate template is not included in the public website download pack.

### Requesting the certificate

Once you have completed the course guide, Practical Exercise 01, the takeoff measurements, task breakdown, milestone plan, sustainability notes, risk assessment, method statement, invoice/payment example and reflection, you may request your TradeQuote Pro Power User Certificate of Completion.

To request the certificate, send your name, completion date and a short confirmation that you have completed the course activities. You may also include screenshots or exported examples from TradeQuote Pro if you want them checked before the certificate is issued.

The real certificate is issued manually as a PDF. The public website only shows a sample preview, so the certificate keeps its value and is not treated as a free downloadable template.

Suggested email subject: TradeQuote Pro Power User Certificate Request

### Suggested evidence to keep for your own CPD records:

- ☐ Completed course checklist and learner reflection.
- ☐ Practice customer and project record created in TradeQuote Pro.
- ☐ Drawing takeoff measurements saved to the Takeoff Notepad.
- ☐ Draft quote or quote preview.
- ☐ Milestone/stage payment plan.
- ☐ Sustainability notes, risk assessment and method statement created or reviewed.

☐ Invoice or staged payment example.

### **Suggested certificate wording**

This certificate confirms that the named learner has completed the TradeQuote Pro Power User Course. The course covers practical use of TradeQuote Pro software, digital construction estimating workflow, quote request handling, drawing takeoff practice, milestone planning, sustainability notes, quotation preparation, invoicing and project documentation. This certificate may support CPD evidence, but it is not a formal construction qualification, accredited estimating qualification, health and safety qualification, or proof of professional competency.

### **Course note**

This course guide is designed as a website/download based training resource. The certificate is requested after completion rather than downloaded as an editable public template.