Isa Takeoff: how-to guide

IntraSync
November 21, 2026

Isa Takeoff turns a prospective job into a priced quote in minutes. Type the structures in, import them from a spreadsheet, or let Plan Read find them on a site plan; each structure's stack of precast pieces is derived and priced from your own catalog and price list.

> *Written for: Estimator, Sales.*

> *In the pictures, a numbered red box marks where to click or type. Where a picture has more than one box, the numbers give the order.*

In this guide

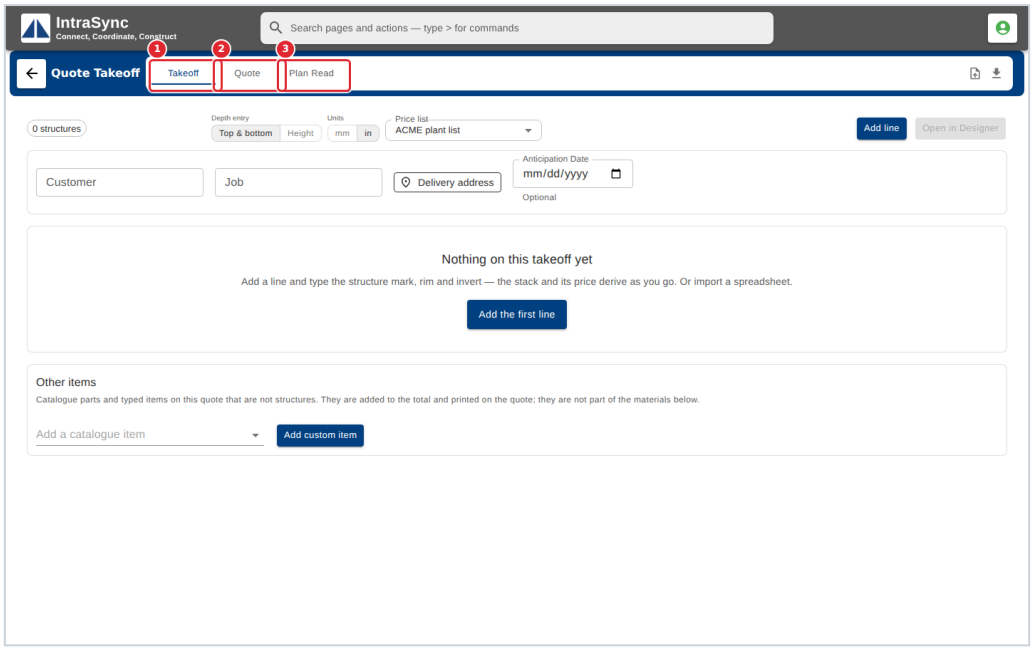
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1. Start a takeoff

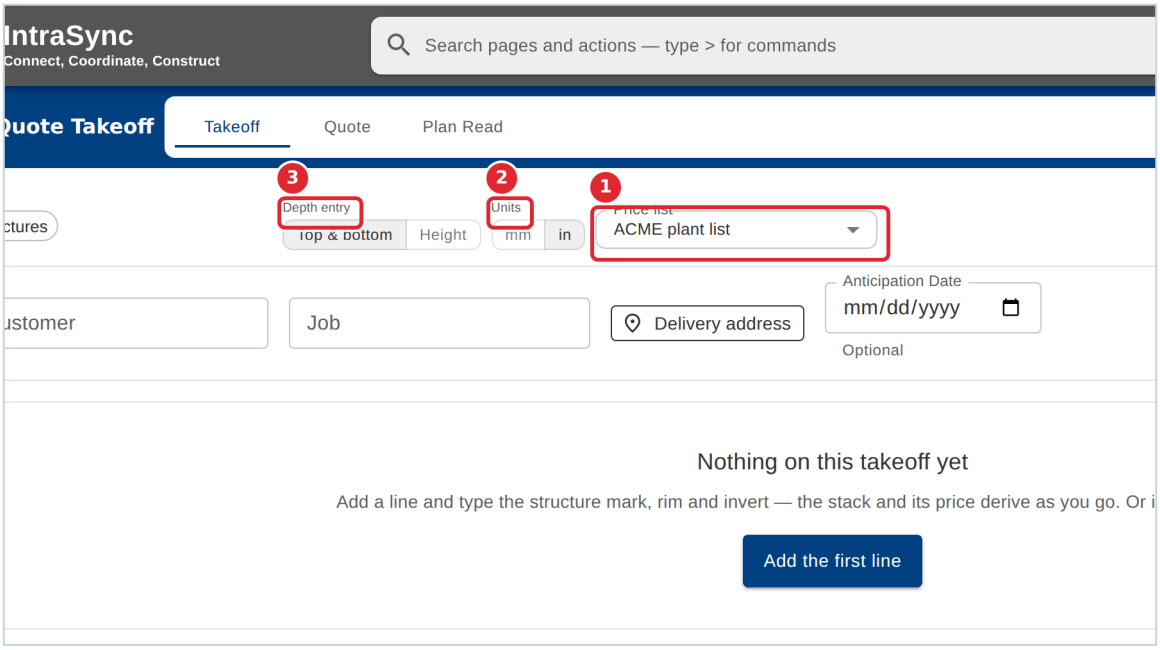
Quote Takeoff is where a job's structures become a priced quote. Check its settings before you add lines, so every line is priced and measured the way you expect.

Before you start:

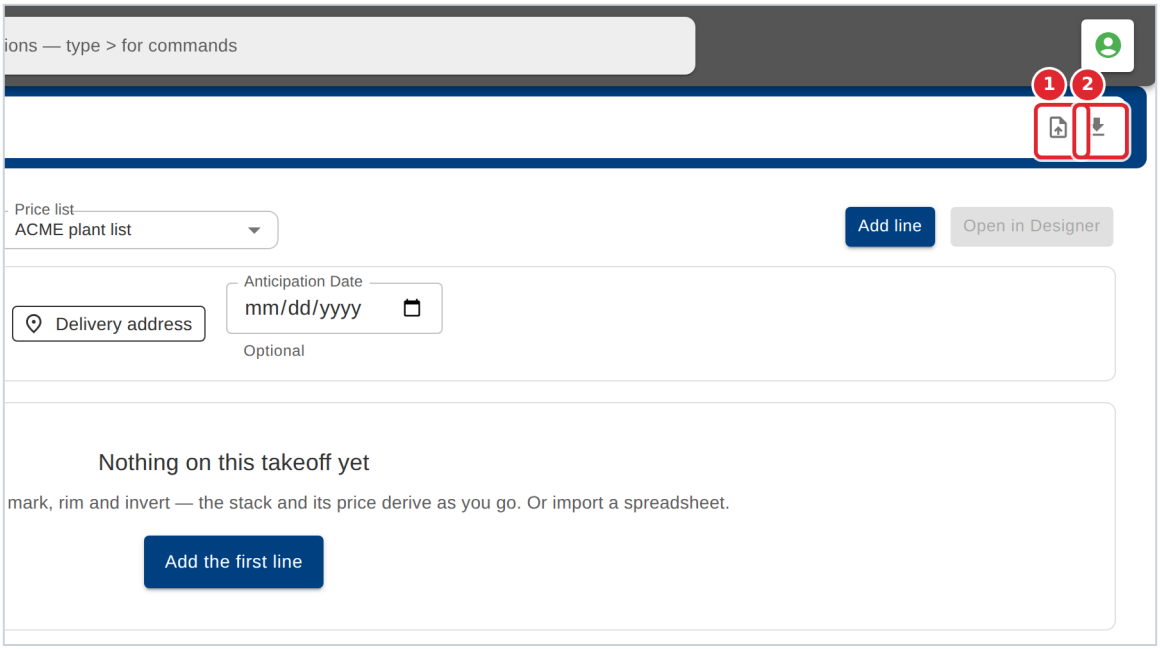
- You are signed in.
- Your plant's structure catalog and price list are set up in the Designer settings.



Step 1. Open Quote Takeoff. A new takeoff starts empty.



Step 2. Check the price list, the display units and how you enter each structure's depth before you add lines.



Step 3. Use the icons at the top right to import a file of structures or download a template for one.

Tips:

- The Units switch changes only how lengths are shown. The takeoff stores them the same way either way.
- Depth entry decides whether you type each structure's rim and invert (Top & bottom) or its height.
- If no price list is chosen, the takeoff still derives each stack but cannot price it.

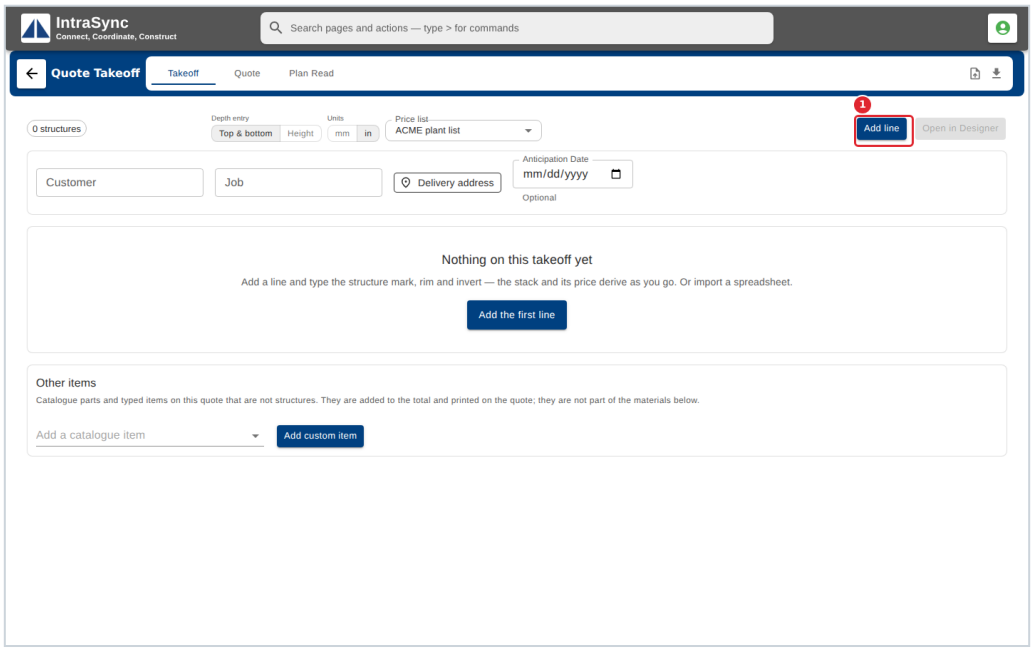
This is shown in the Isa Takeoff video at 0:03.

2. Add structures by hand

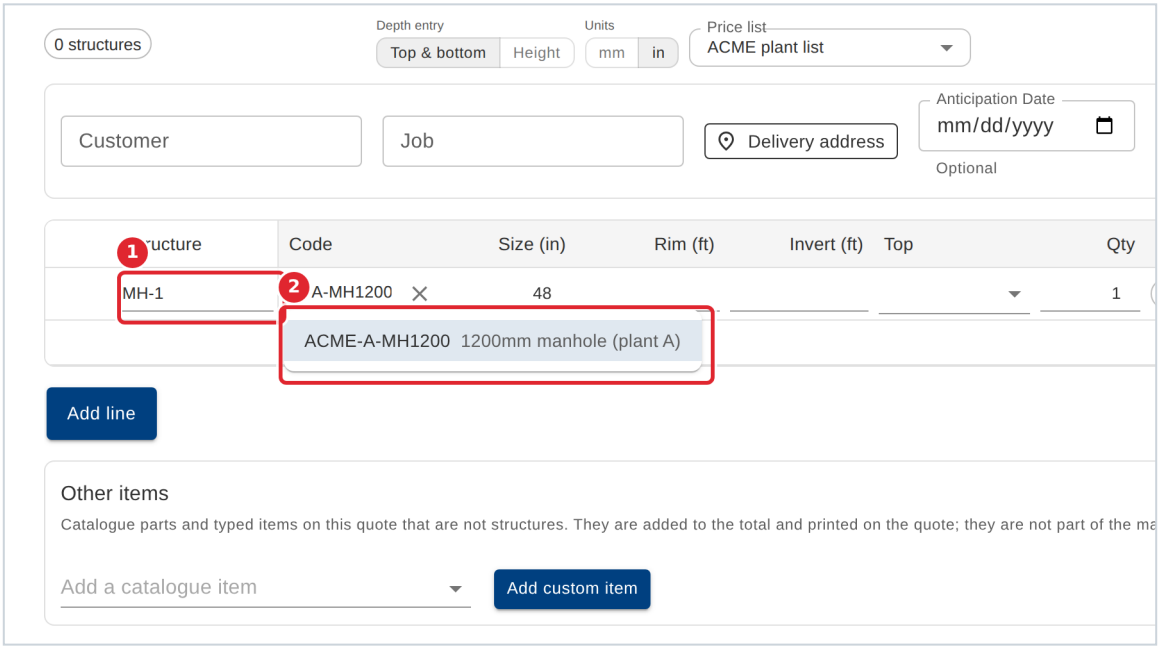
Type each structure from the plans: its mark, its code or size, its elevations and its top. The takeoff works out the stack of precast pieces and prices it as you go.

Before you start:

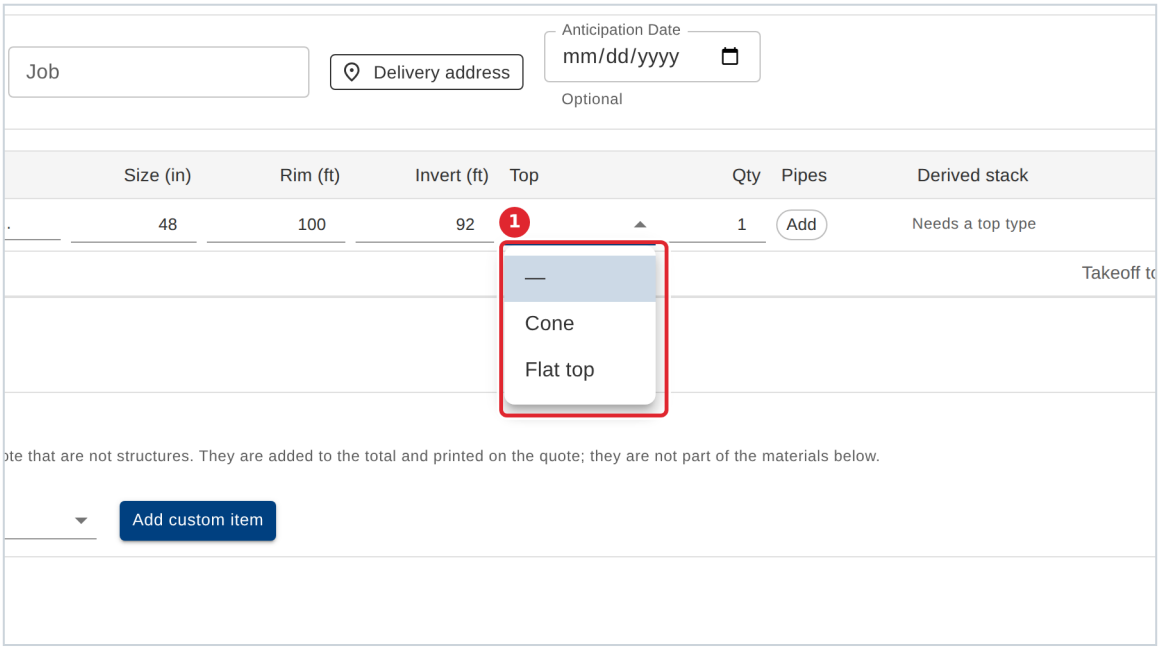
– A price list is selected.



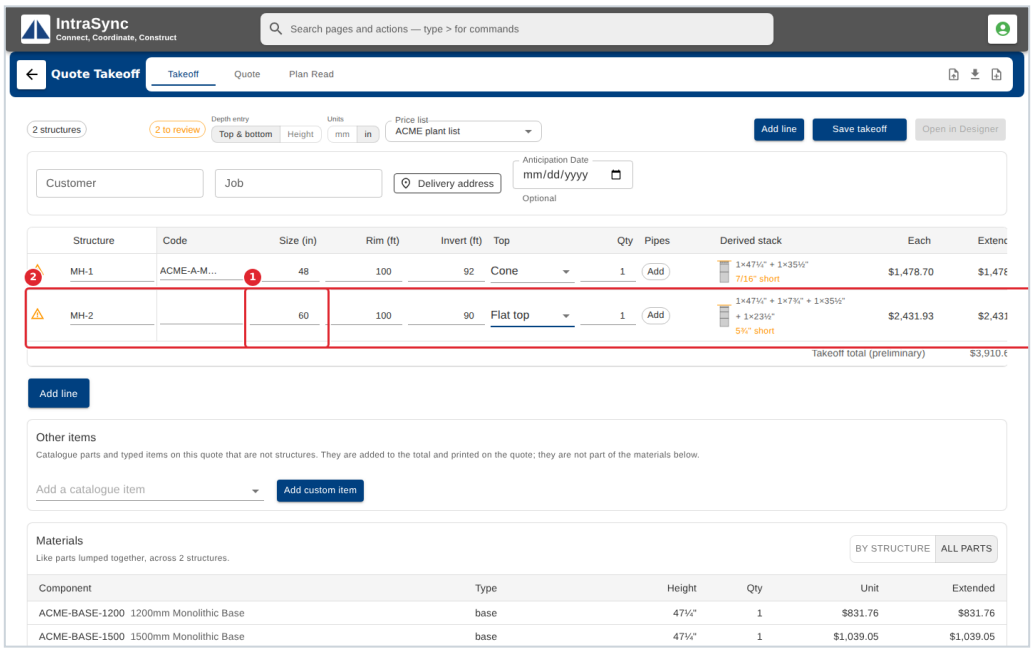
Step 1. Select Add line.



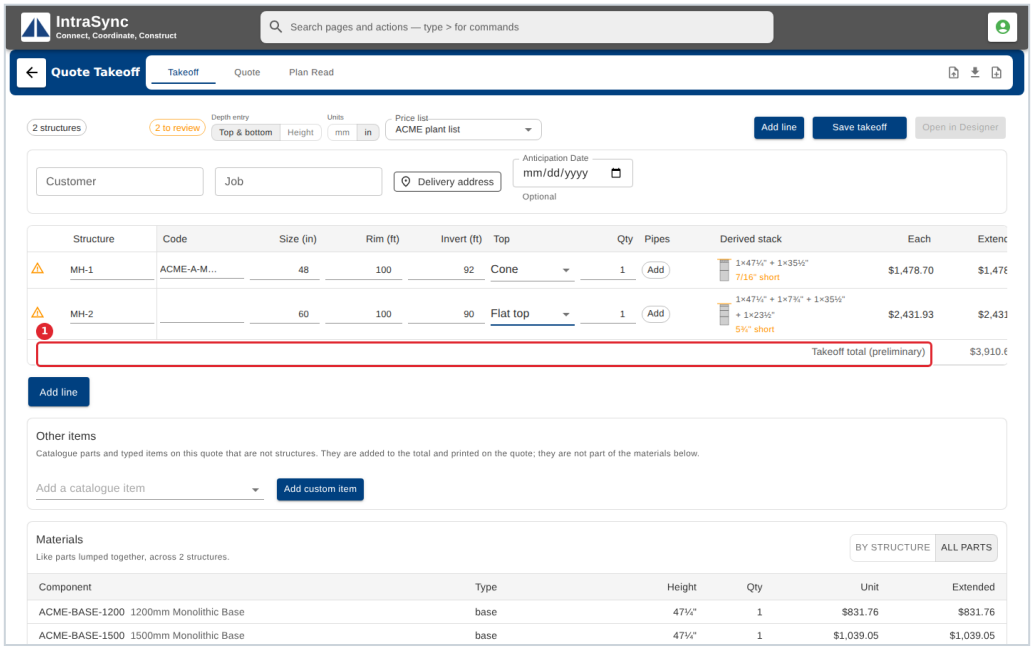
Step 2. Type the structure's mark, then start typing a structure code and pick it from your catalog.



Step 3. Enter the rim and invert elevations, then choose the top.



Step 4. With no code, enter the diameter instead. The line derives its stack of pieces and prices it.



Step 5. The preliminary total for the whole takeoff is under the lines.

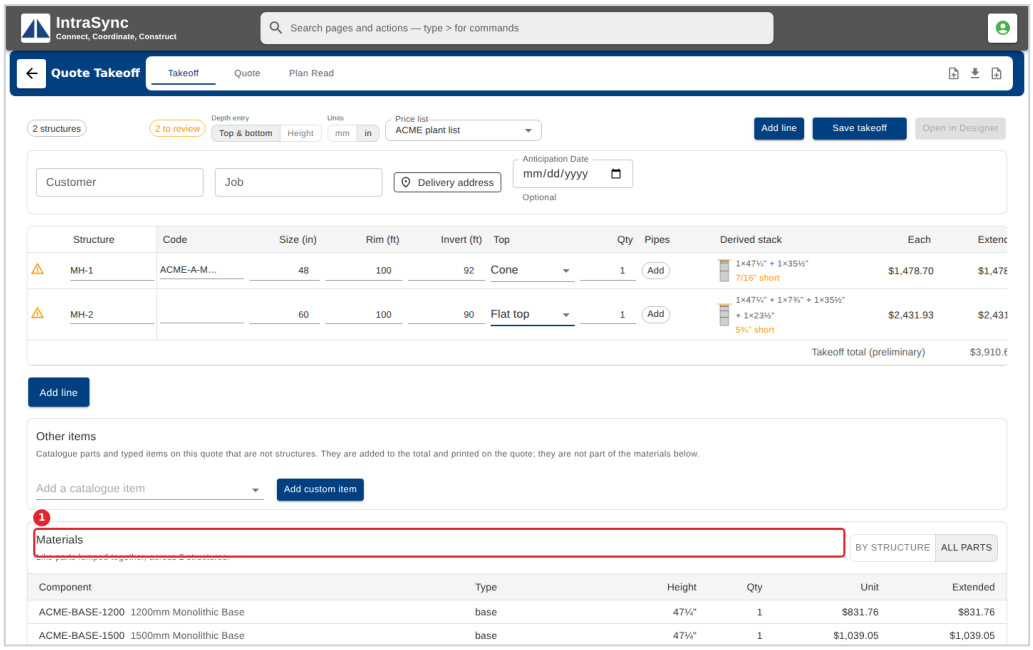
Tips:

- A line with no structure code needs a diameter and a top before it can derive a stack.
- The counts at the top left say how many lines need fixing and how many need a look. Fix those before you save or send.
- A warning under the derived stack (for example a piece that is short of the height) is a line to review, not an error in your typing.
- Select Add in a line's Pipes column to record the pipes that connect to that structure.

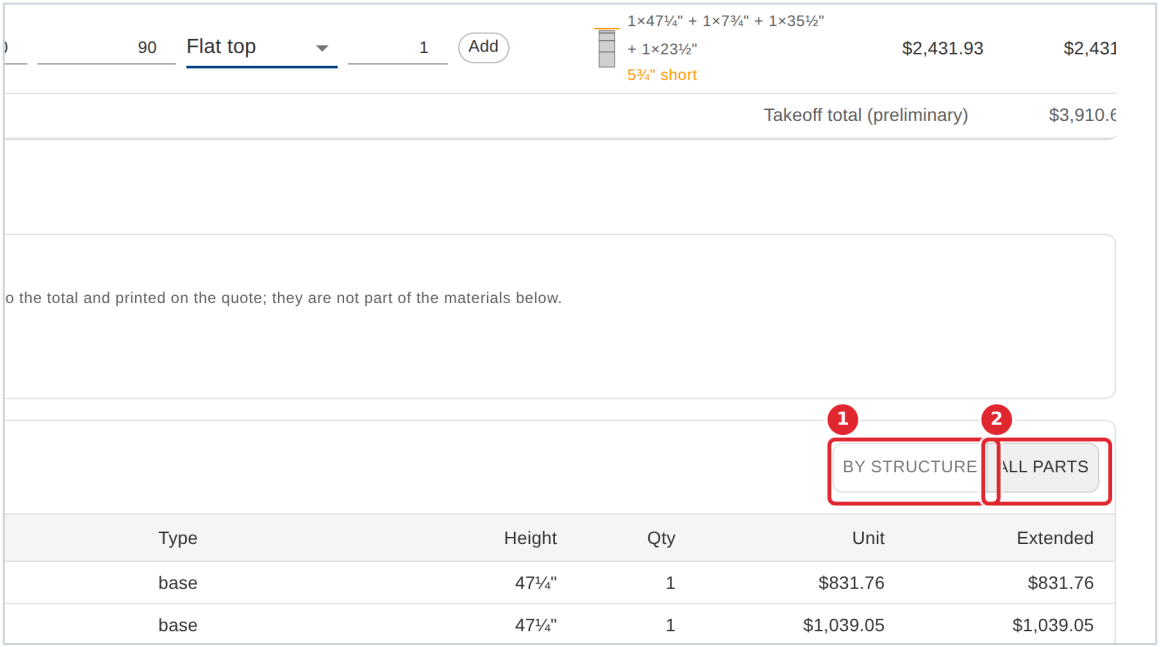
This is shown in the Isa Takeoff video at 0:06.

3. Review the materials and add other items

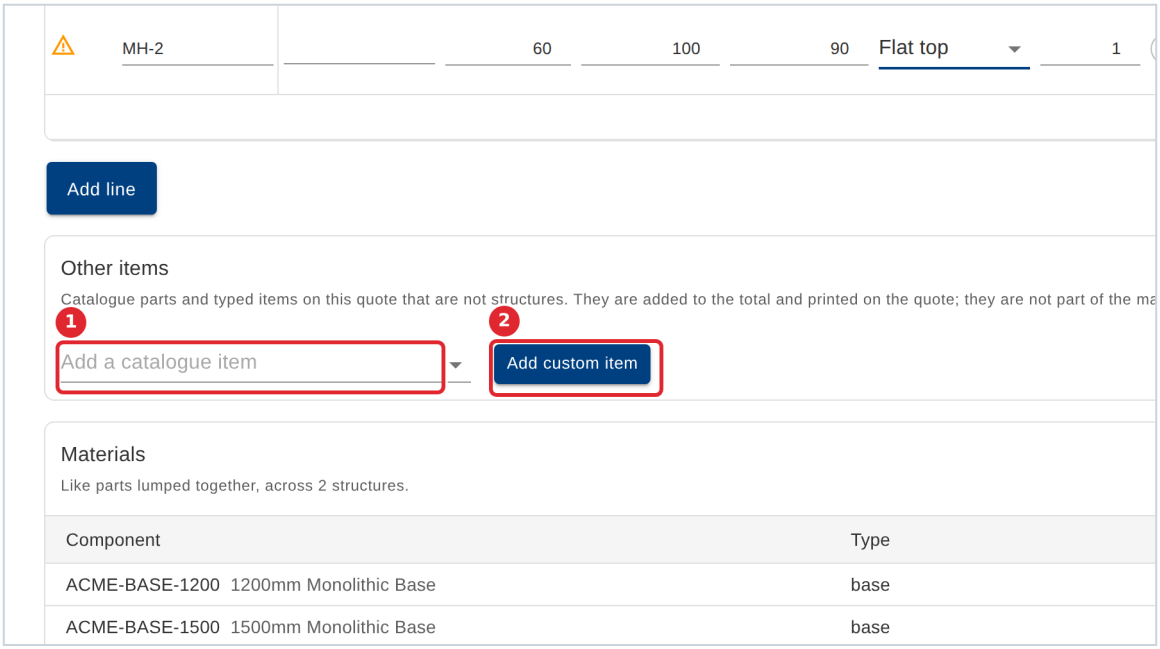
Check the precast pieces the takeoff needs, and add anything that is not a structure, such as catalogue parts or typed items, so the total is complete.



Step 1. Scroll down to Materials to see every precast piece the takeoff needs, with its price.



Step 2. Switch between By structure and All parts to group the pieces either way.



Step 3. Under Other items, add catalogue parts or typed items that are not structures. They count toward the total.

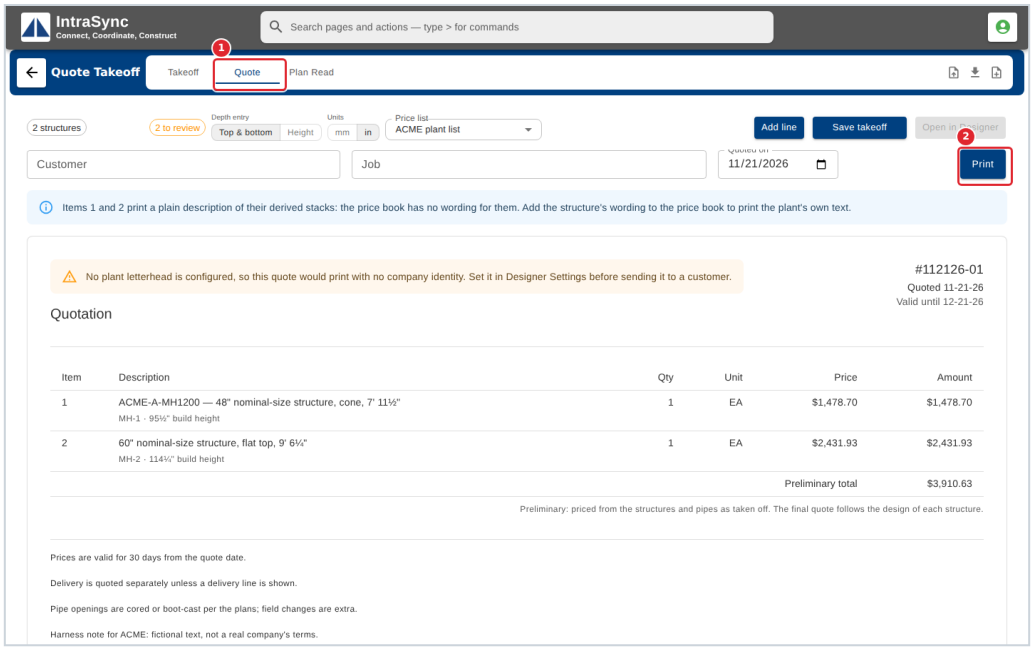
Tips:

– Other items are added to the total and printed on the quote, but are not part of the materials list.

This is shown in the Isa Takeoff video at 0:17.

4. Read and print the quote

The Quote tab shows the same takeoff the way the customer will see it, ready to print.



Step 1. Select the Quote tab to see the same takeoff as the customer's quote. Check the quote date, then select Print.

Tips:

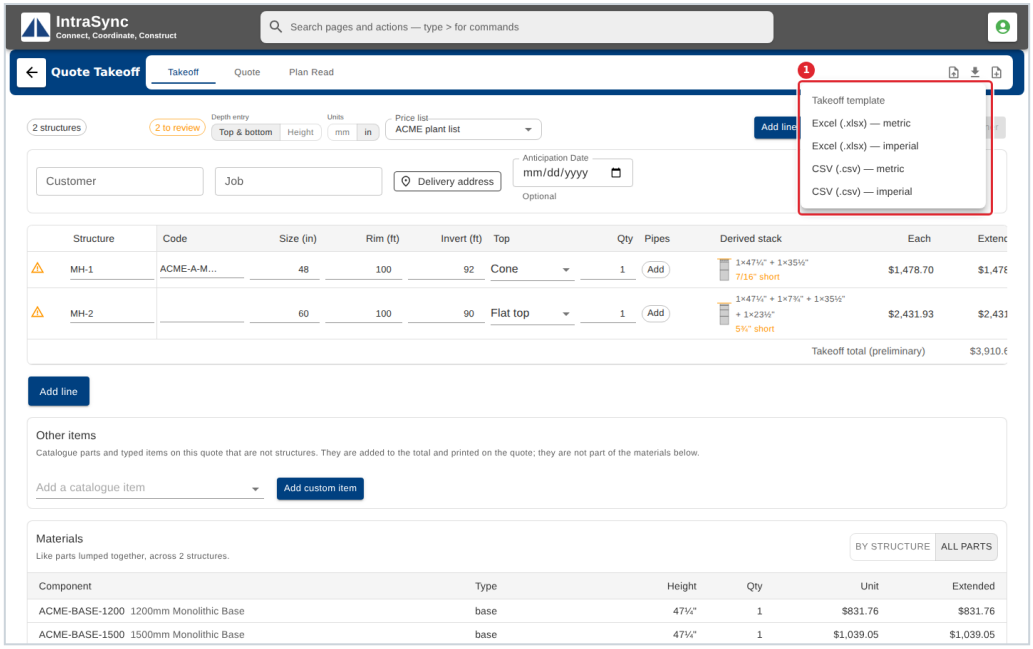
- If a notice says no plant letterhead is configured, set it in the Designer settings before you send a quote to a customer.
- A structure with no wording in the price book prints a plain description of its stack. Add the wording to the price book to print your own text.

5. Import structures from a spreadsheet

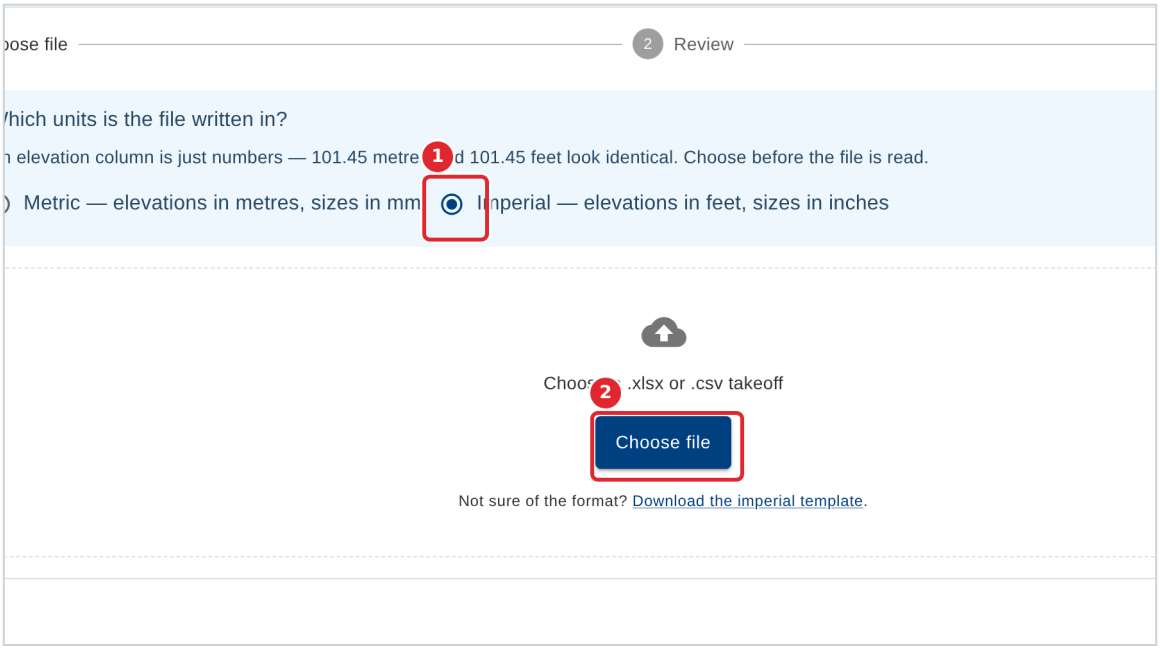
When someone has already listed the structures in Excel or a CSV file, import them instead of typing them.

Before you start:

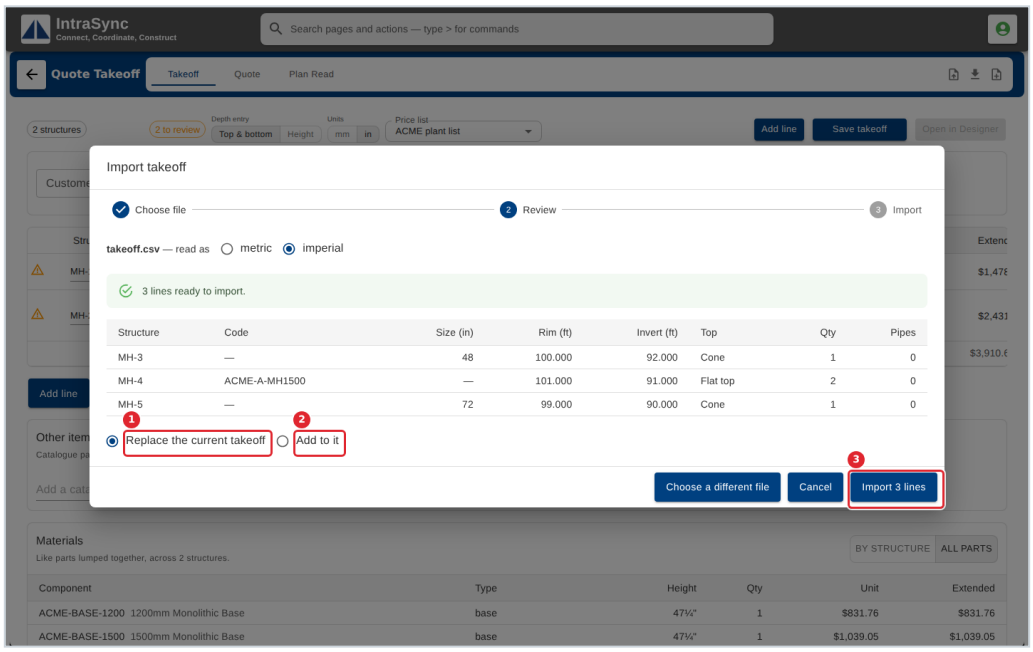
- The file uses the template's columns. Download a template to send to whoever prepares the list.



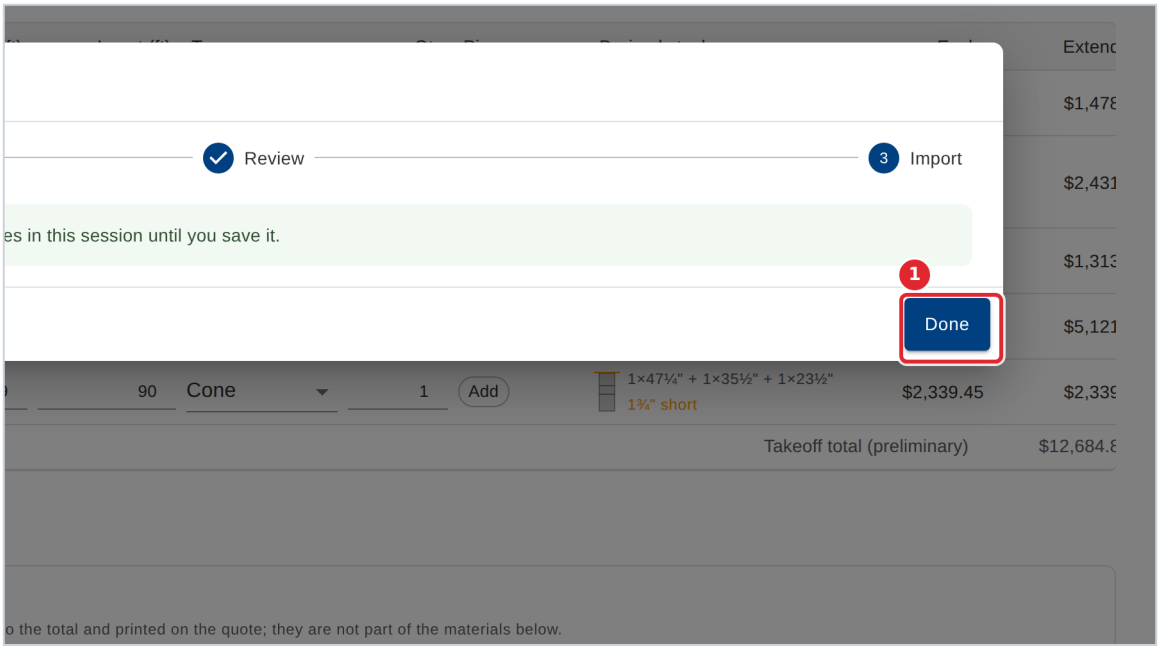
Step 1. To get the right columns, select Download a template and choose the format and units.



Step 2. Select Import. Say whether the file is in metric or imperial units first, then choose the file.



Step 3. Check the preview. Choose whether to add the lines to the takeoff or replace it, then select Import.



Step 4. The dialog says how many lines were imported. Select Done.

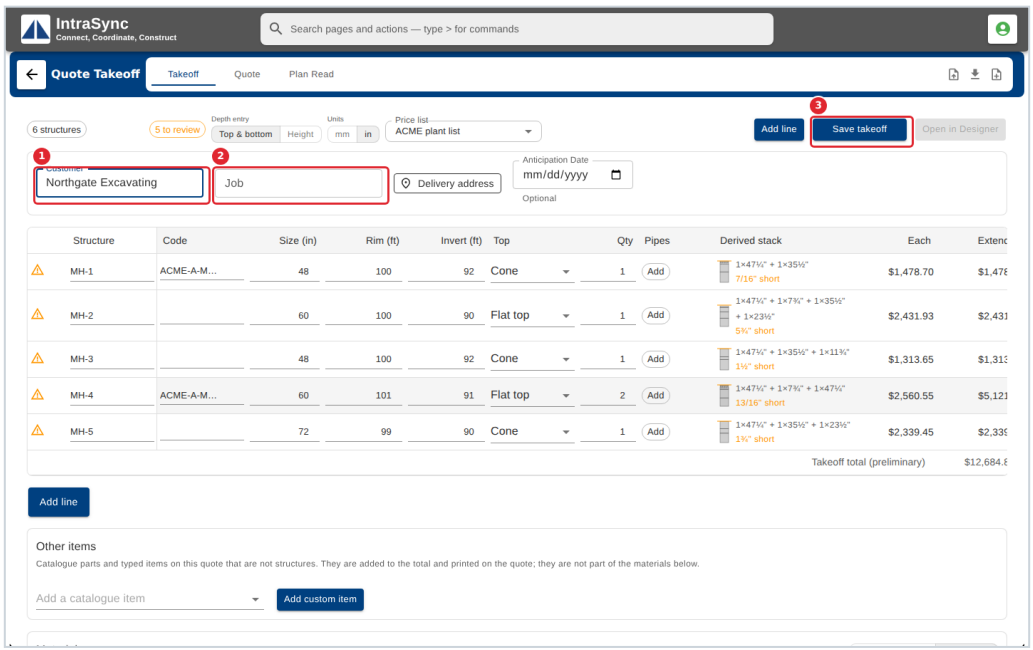
Tips:

- Always choose the file's units first: an elevation in a file is only a number.
- Add to it keeps the lines already on the takeoff. Replace the current takeoff removes them.
- Lines the import cannot use are listed with the reason they were skipped.

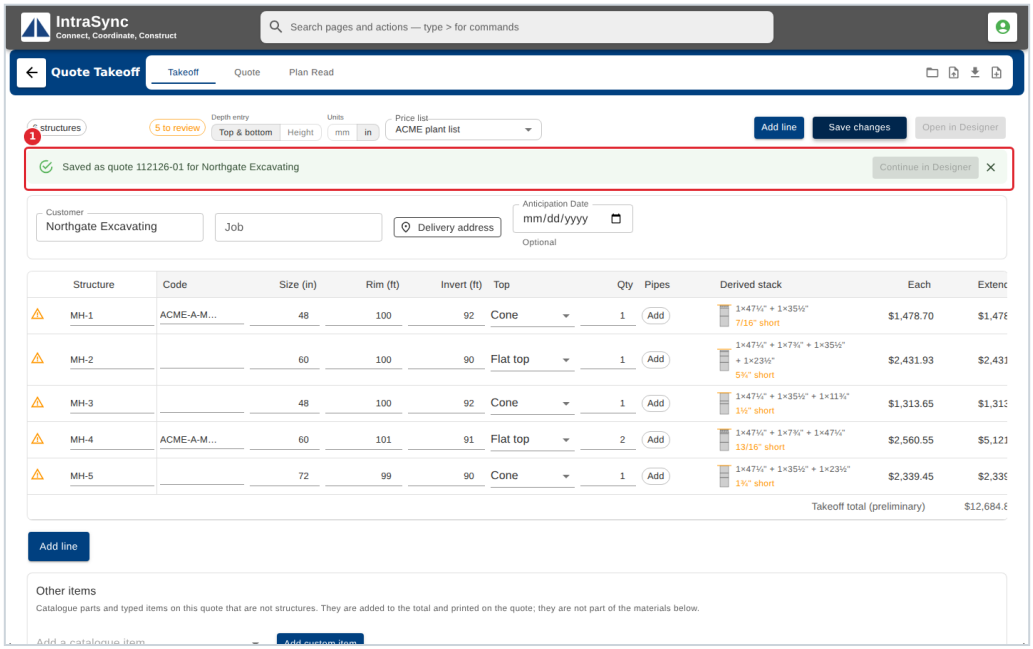
This is shown in the Isa Takeoff video at 0:20.

6. Save a takeoff and open it again

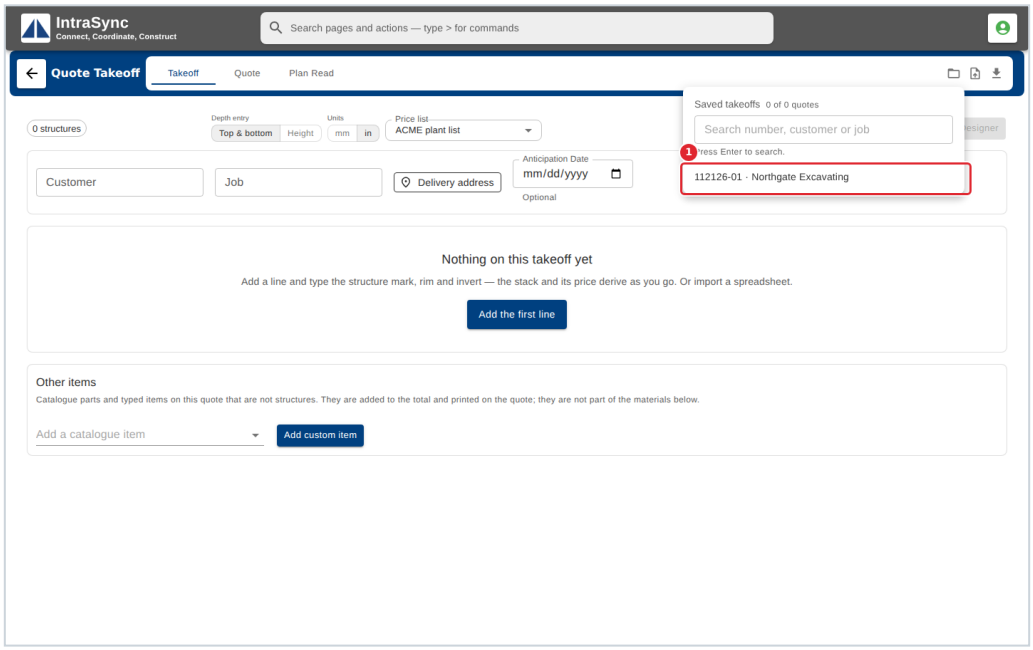
Saving stores the takeoff as a quote you can come back to, change and save again.



Step 1. Enter the customer, and the job if you have one, then select Save takeoff.



Step 2. The takeoff is saved as a quote, and the message names its quote number. Later changes are saved with Save changes.



Step 3. To pick up a saved takeoff, select Open a saved takeoff and choose it by quote number and customer.

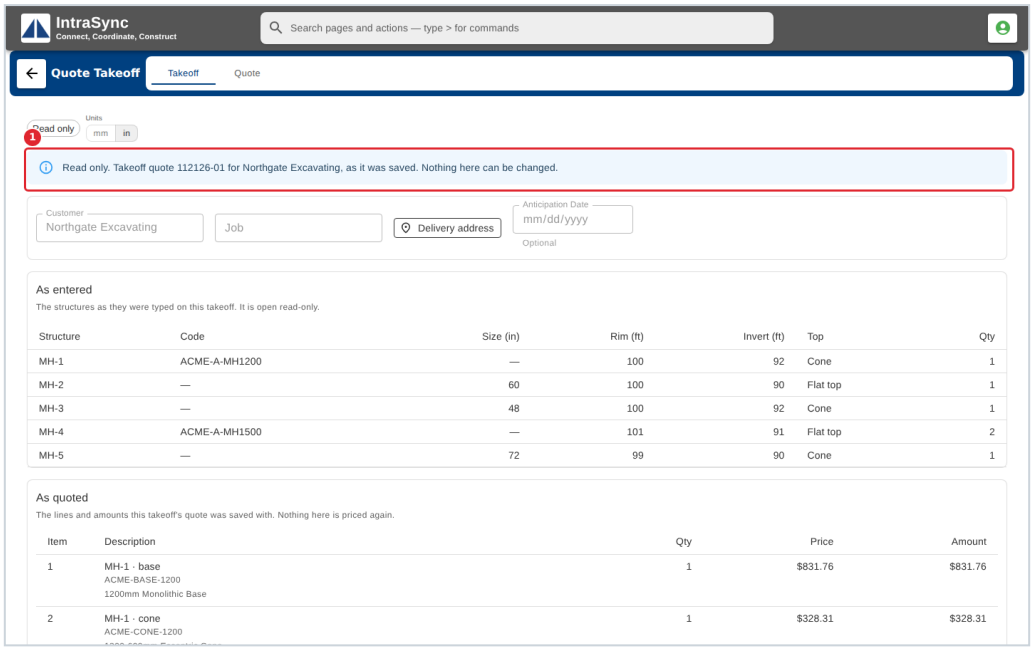
Tips:

- After the first save, the button reads Save changes. Save again after every change you want to keep.
- New takeoff clears the screen. Save first if you want to keep what is on it.

This is shown in the Isa Takeoff video at 0:32.

7. Look at a saved takeoff without changing it

Opened from its record, a saved takeoff is shown read only, so it can be checked without any risk of changing it.



Step 1. A takeoff opened from its record shows Read only. Nothing on this screen changes it.

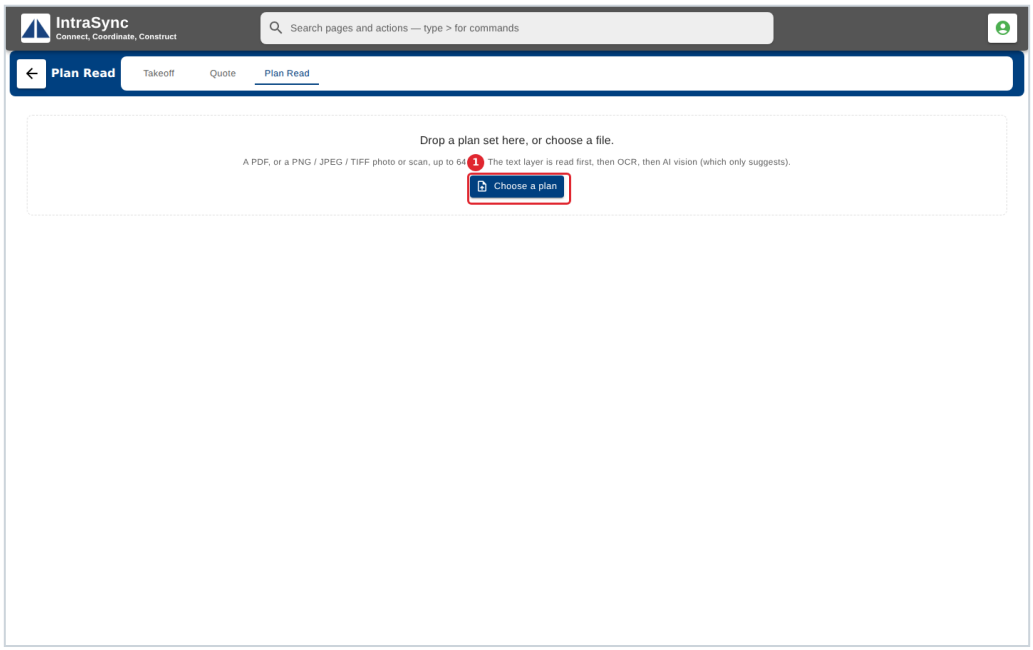
This is shown in the Isa Takeoff video at 0:48.

8. Read a site plan

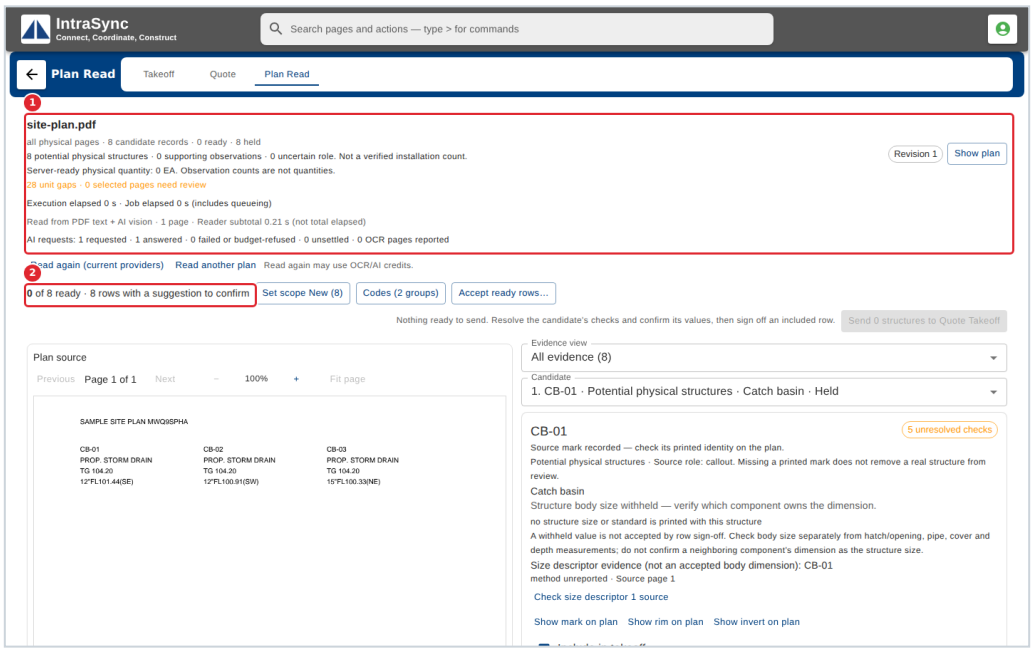
Plan Read reads a site plan PDF and finds its structures, with their rim, invert and pipe values, so you do not have to type them.

Before you start:

– You have the site plan as a PDF.



Step 1. Open the Plan Read tab and select Choose a plan to upload a site plan PDF.



Step 2. When the read finishes, the header says how many candidates were found and how many are ready.

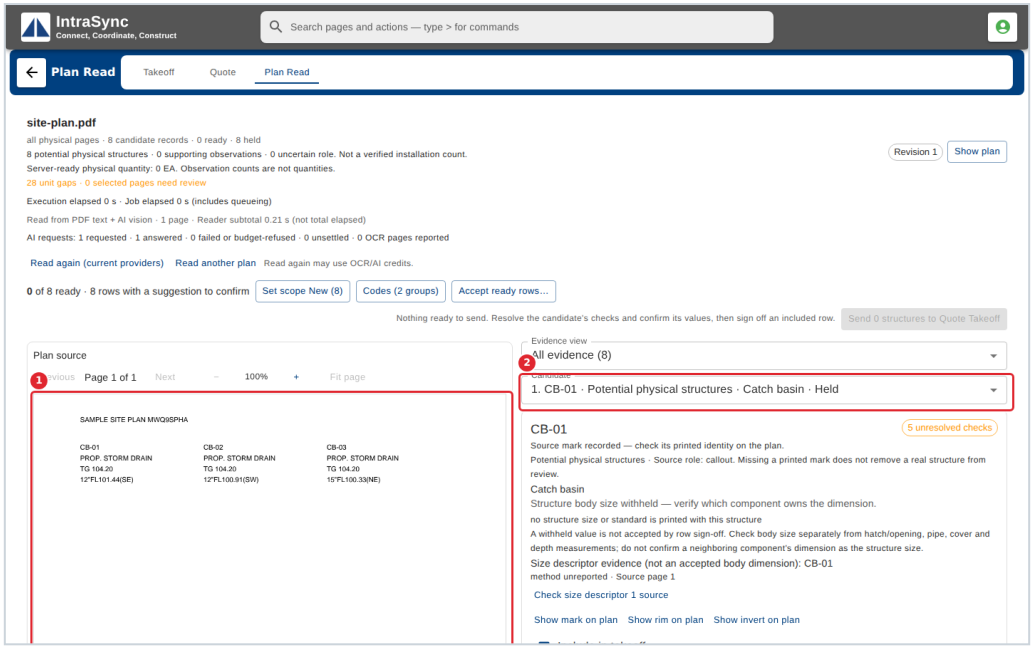
Tips:

- Read again may use OCR or AI credits.
- The counts in the header are what was found on the plan. They are not quantities until you review them.

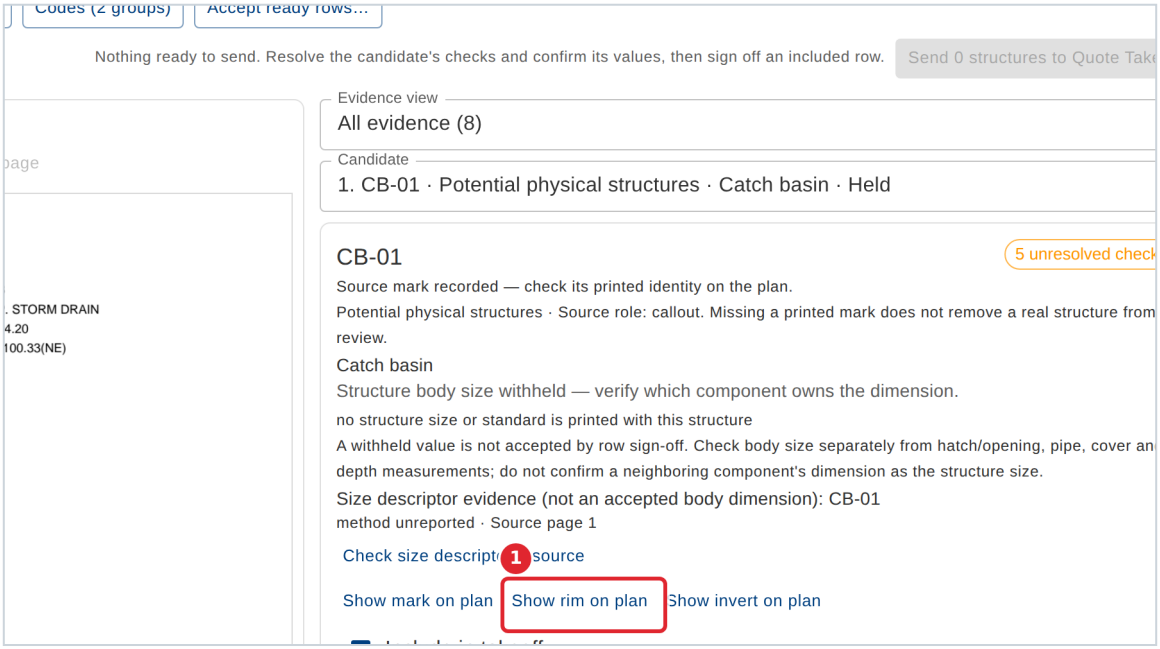
This is shown in the Isa Takeoff video at 0:53.

9. Review and sign off the structures found

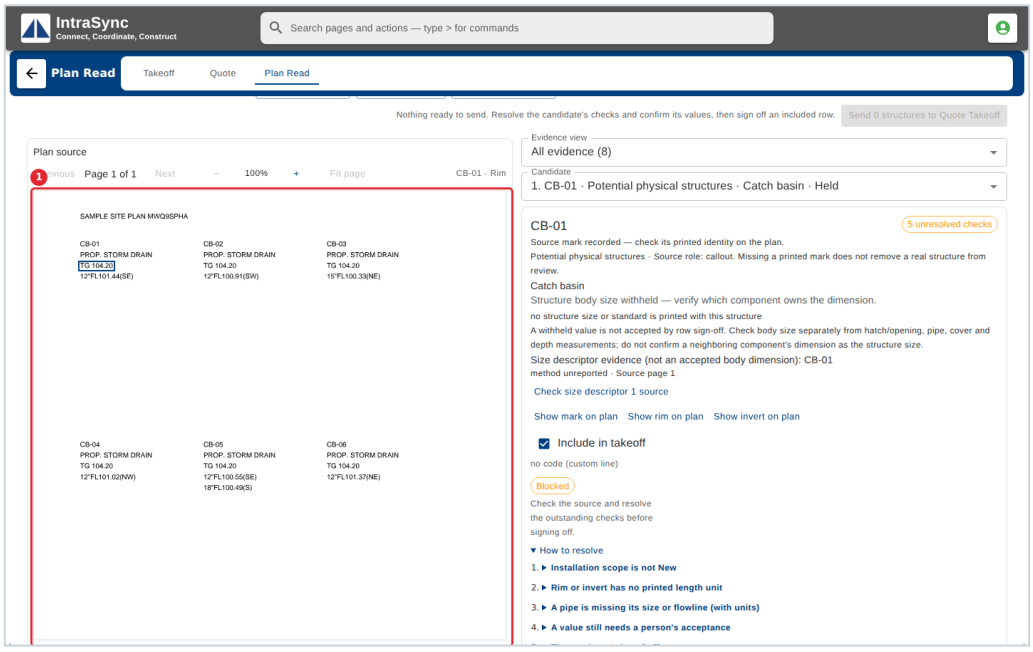
Nothing read from a plan is used until a person has checked it. Review each structure against the plan, fill in what the plan does not print, and sign it off.



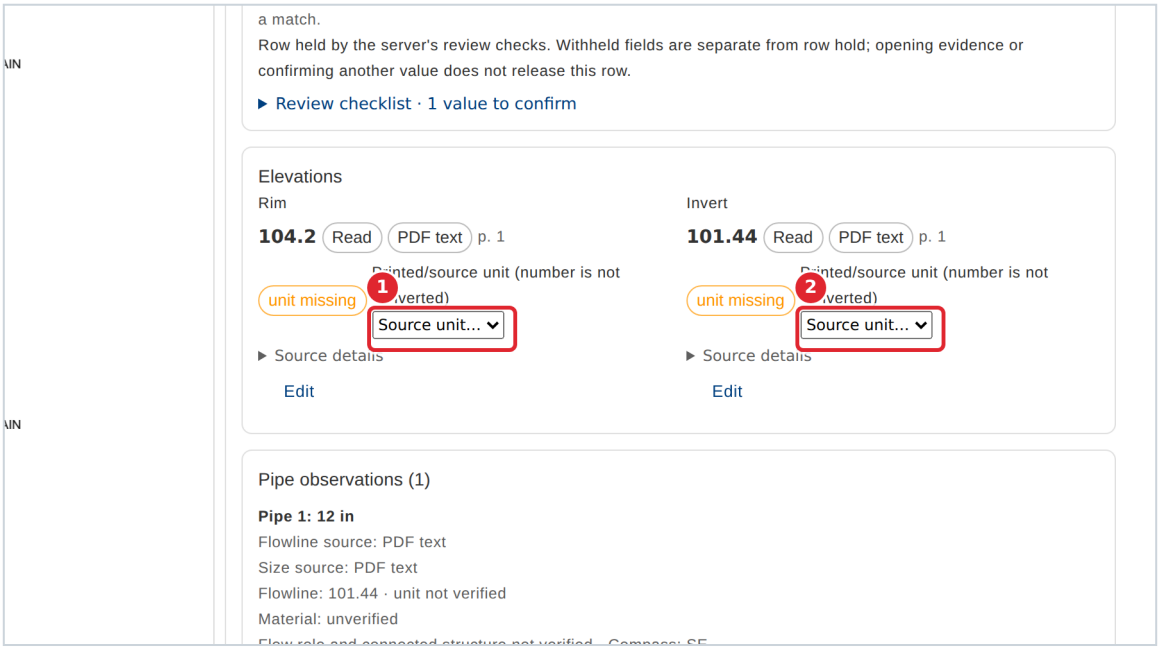
Step 1. The plan is on the left. Pick a structure from the Candidate list on the right to review it.



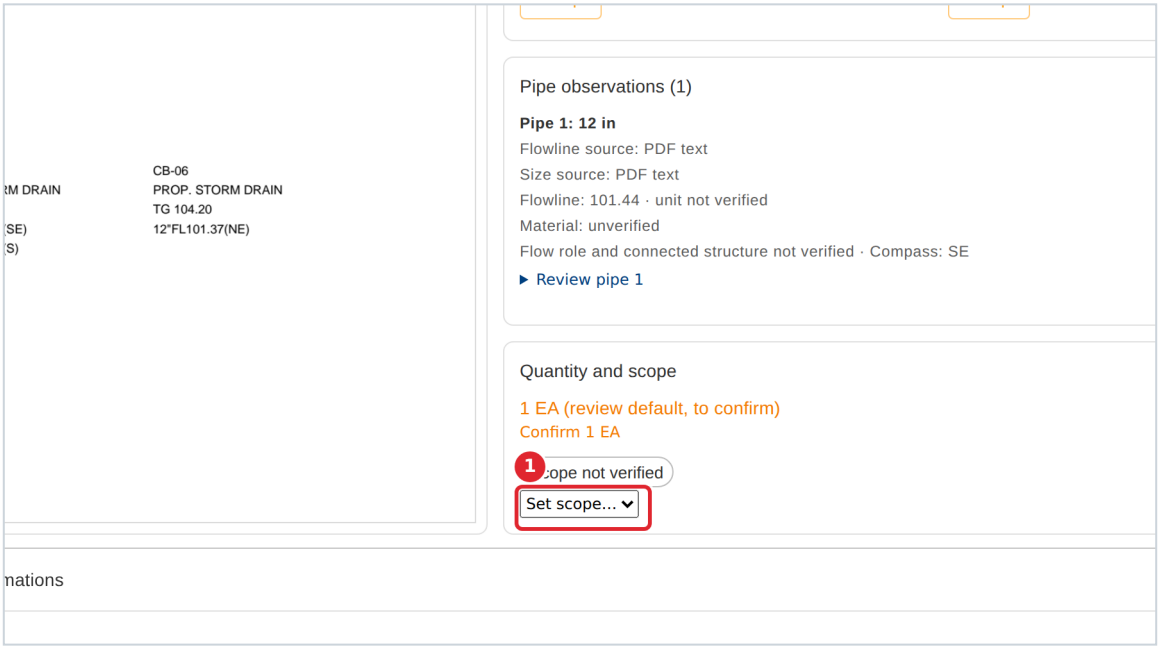
Step 2. Each candidate lists its unresolved checks and where its values came from. Select Show rim on plan to see where the rim was read.



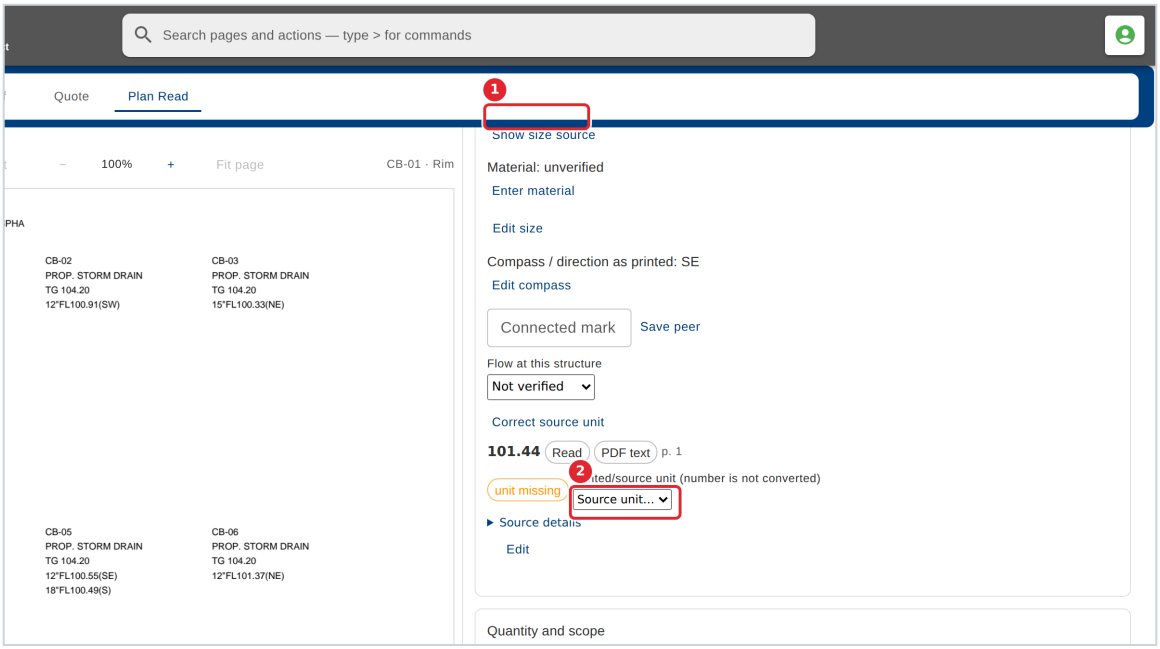
Step 3. The value is outlined on the plan.



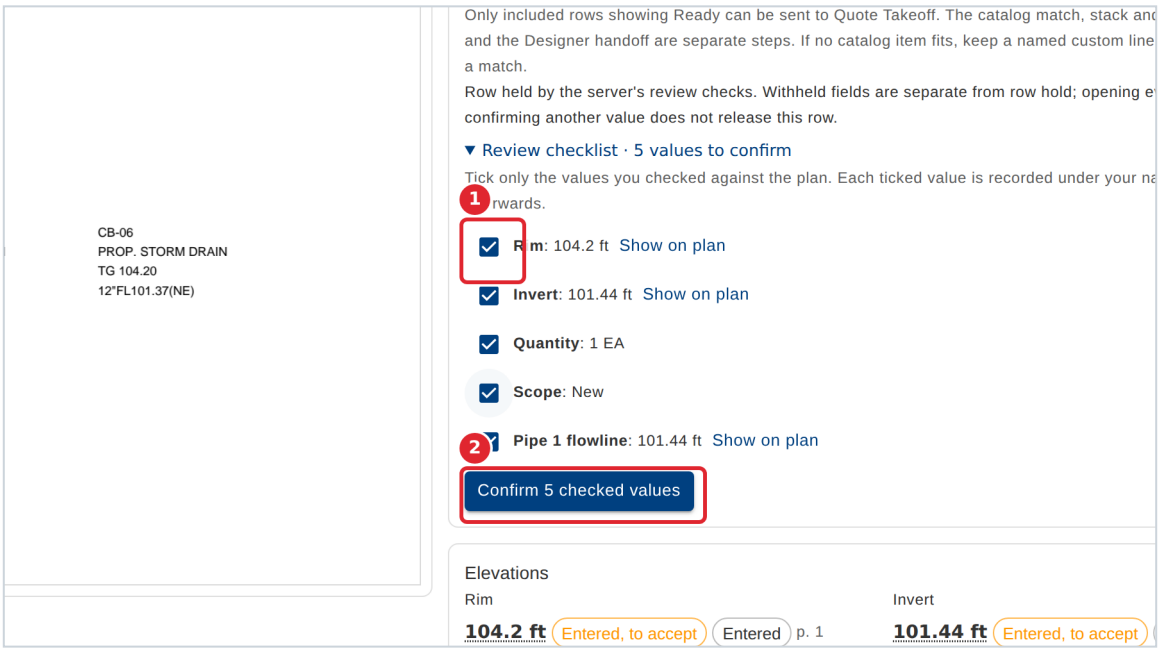
Step 4. If the sheet prints no unit, choose the unit the sheet uses for the rim and the invert.



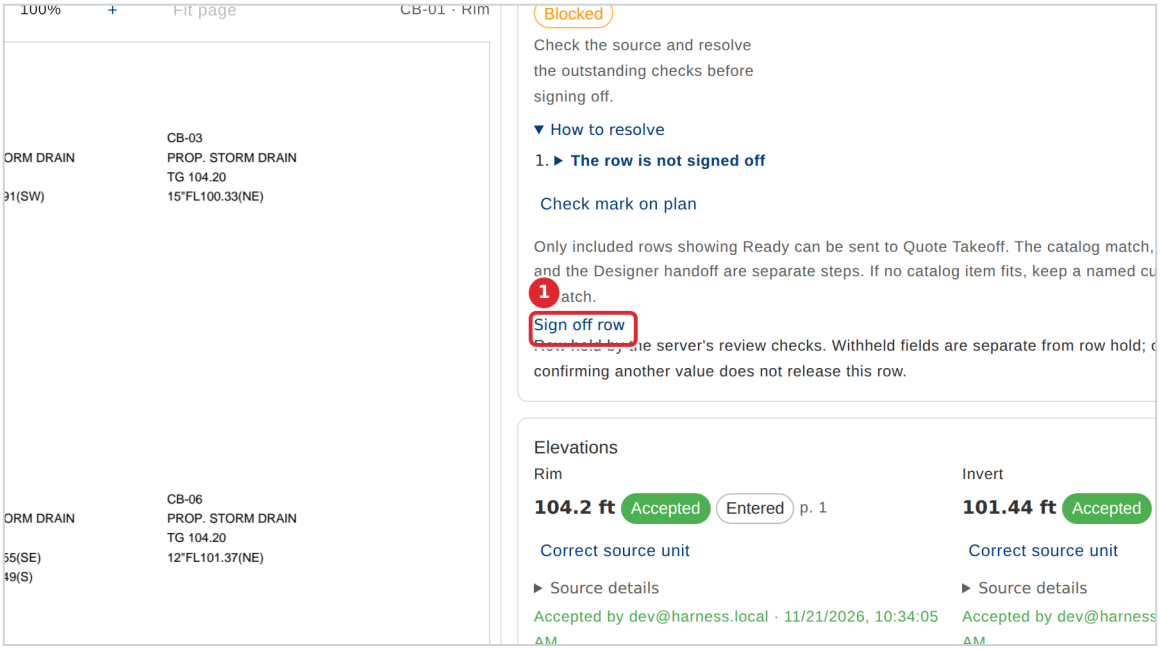
Step 5. Set the structure's scope (New, Existing, Remove and so on) when the plan does not print it.



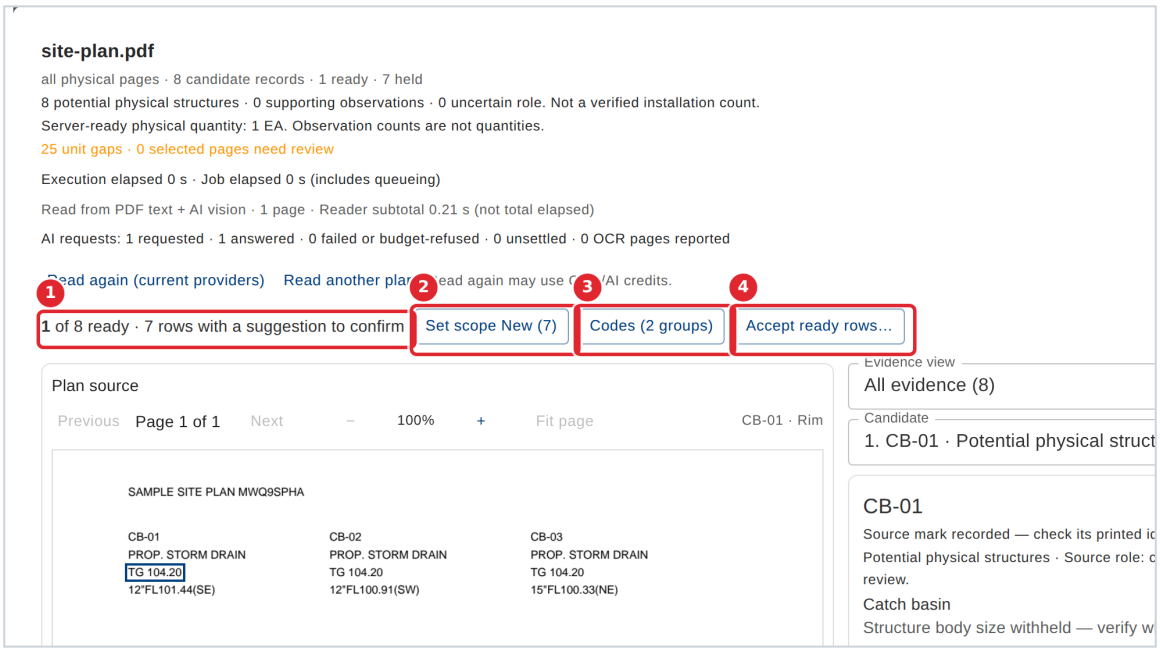
Step 6. Open each pipe's review. Give its flowline a unit, and correct its material, size or direction if needed.



Step 7. Open the Review checklist, tick only the values you checked against the plan, then select Confirm. Each is recorded under your name.



Step 8. When nothing is left to resolve, select Sign off row.



Step 9. The row is now counted as ready. Set scope New, Codes and Accept ready rows work on many rows at once.

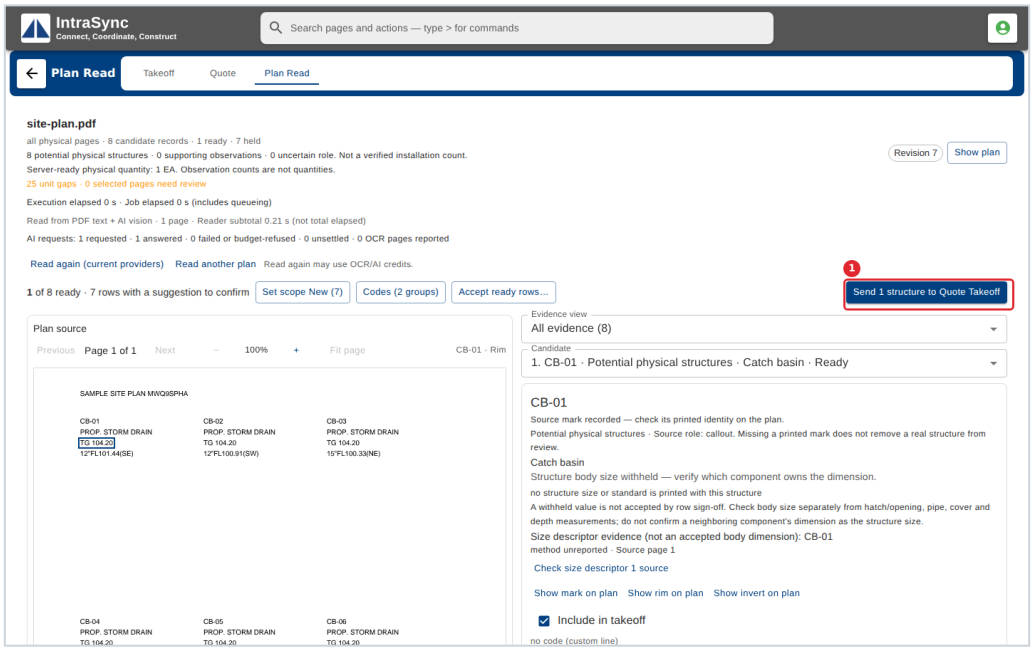
Tips:

- Tick only the values you actually checked against the plan. Each confirmation is recorded under your name.
- A value suggested by AI stays a suggestion, and is not counted, until a person accepts it.
- A withheld value, such as a structure size the plan does not print, is not accepted by signing off the row.
- Only included rows showing Ready can be sent.

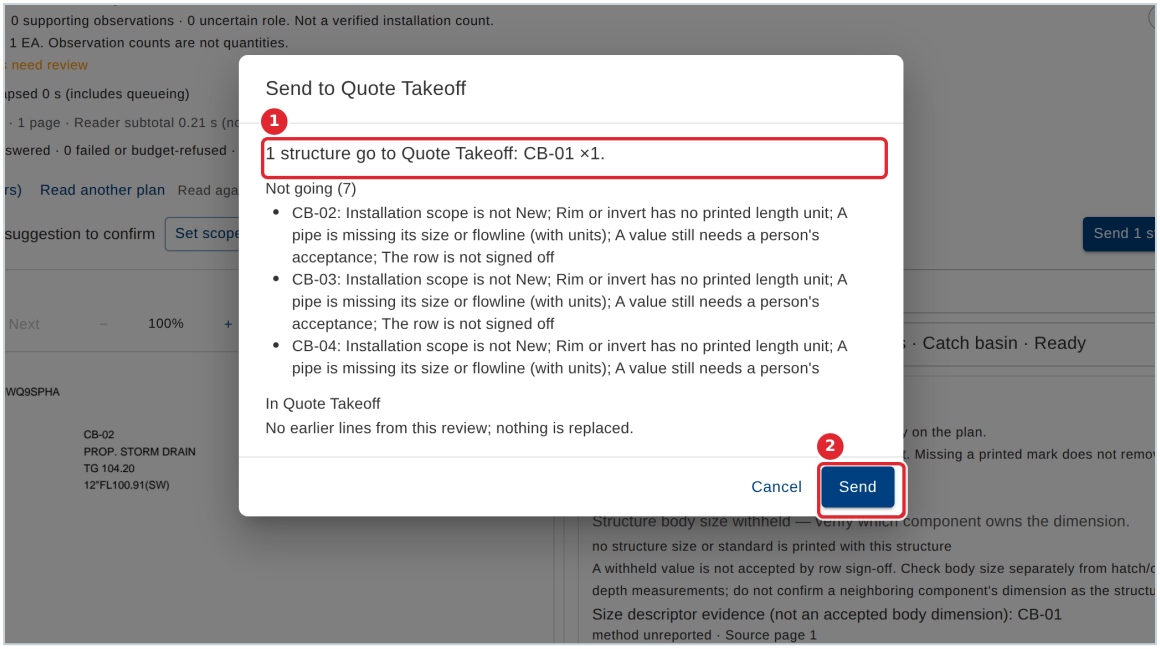
This is shown in the Isa Takeoff video at 1:01.

10. Send the reviewed structures to Quote Takeoff

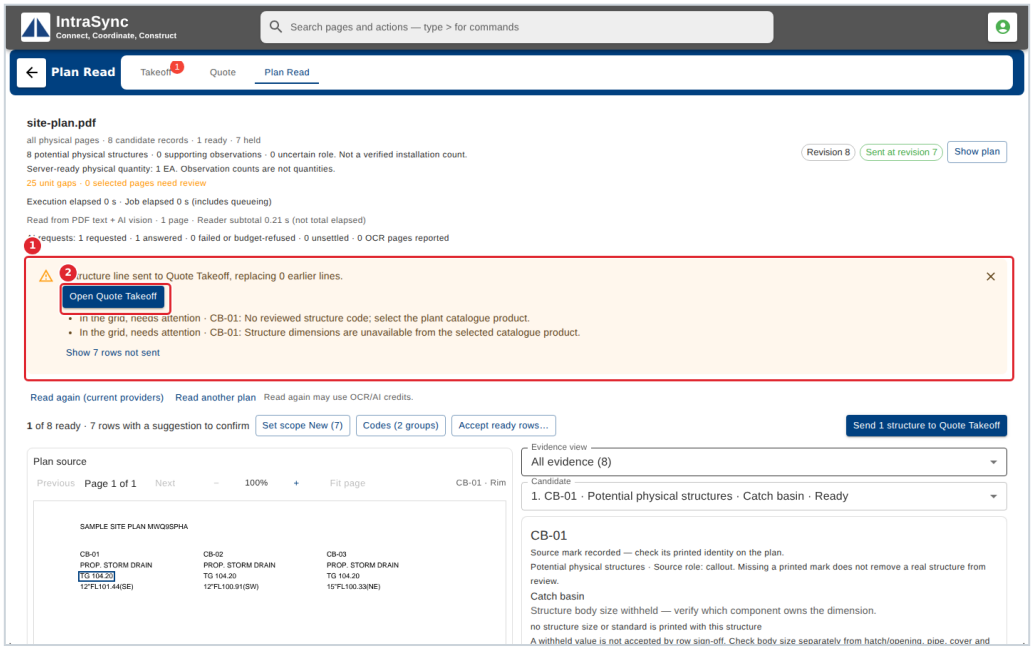
Ready structures become lines in Quote Takeoff, where they are matched to your catalog and priced.



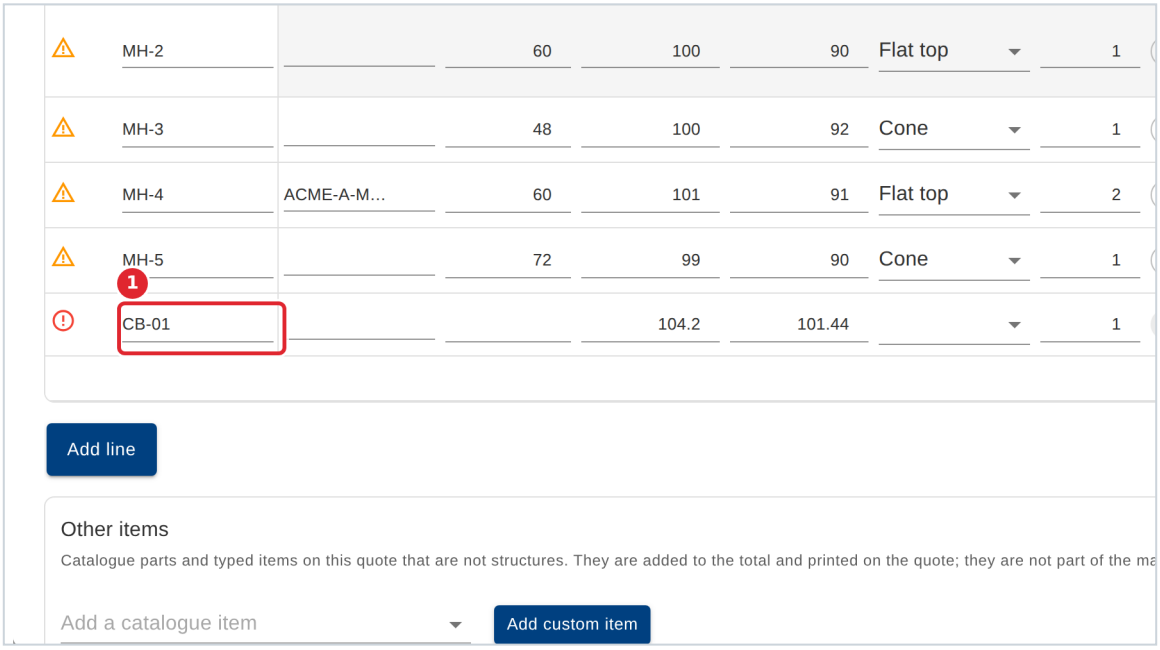
Step 1. Select Send to Quote Takeoff.



Step 2. The dialog lists what goes and what is not going, with the reason for each. Select Send.



Step 3. The result lists anything that needs attention in Quote Takeoff. Select Open Quote Takeoff.



Step 4. The structure is a line in Quote Takeoff. Pick its structure code and top to derive and price it.

Tips:

- Rows that are not ready stay behind, and the dialog says why for each one.
- A line sent from a plan may still need its structure code and top before it can be priced. The result lists what needs attention.

This is shown in the Isa Takeoff video at 1:21.

Glossary

- Takeoff: The list of structures on a job, with each one's size, elevations and top.
- Derived stack: The precast pieces a structure needs, worked out from its size, depth and top.
- Rim and invert: The elevation of the top of a structure and of the lowest pipe flowline in it.
- Scope: Whether a structure is new, existing, to be removed, adjusted, temporary or retained.
- Sign off: A person's statement that a structure read from a plan has been checked and is ready to send.