

Sage Estimating

Sage Estimating

**(formerly Sage Timberline
Estimating)**

Getting Started Guide

sage

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Contents

Chapter 1—Welcome to Sage Estimating	1
About This Booklet	1
Ways to Get Help	1
The Help System	1
Read the Supporting Documentation Before You Begin	4
Conventions Used in this Document	4
Training	5
Technical Assistance	5
Submitting Enhancement Requests	5
Chapter 2—Learning Basic Concepts	6
Sage Estimating Ribbon Layout	6
Classic View	6
Working With the Database and Estimates	7
Learning About the Estimate Database	7
Learning About Estimates	8
Viewing Estimate Information	8
Learning About The Standard Database	9
Accessing the Standard Database From the Estimate	9
Learning About the Address Book Database	10
Chapter 3—Creating a New Estimate	11
Creating a New Estimate	11
Chapter 4—Performing Takeoff	13
Performing Takeoff	13
Quick Takeoff	13
Item Takeoff	14
Assembly Takeoff	15

Review Assemblies	16
To review a pass	17
To revise an existing pass	17
One-Time Item Takeoff	17
Chapter 5—Working with the Spreadsheet	19
The Spreadsheet Window	19
Spreadsheet Window Ribbon	20
Changing the Appearance of the Spreadsheet	21
Changing Item Prices and Quantities	23
Finding Incomplete Items	23
The Detail Window	24
The Totals Window	24
Formatting the Totals Window	25
To format a column in the Totals window	25
To hide a column on the Totals window	25
To insert addons in the Totals window	26
To insert subtotals	27
Docking the Totals window	27
Chapter 6—Printing Estimate Reports	28
To print an estimate report	28
To save a report as a file	29
To preview a report	30
Chapter 7—Using Address Book	31
Creating an Address Book Database	32
Editing a Contact List	32
To edit contacts in an Address Book database	32
To add contacts to an Address Book database	33
Chapter 8—Advanced Features	34
Using WBS Codes	34
Including the Cost of Crews	36

Crews and Items	37
Rate Tables	37
Spreadsheet Sequences	38
Subcontractor Bids	39
To enter subcontractor bids	39
To select a subcontractor bid	40
Adjusting Figures in Spreadsheet Columns	40
To adjust a spreadsheet column	41
To finalize an adjustment	42
Move/Copy Items	42
Appendix—Keyboard Shortcuts	44
General Shortcuts in Sage Estimating	44
Shortcuts for the Spreadsheet	45
Index	46



Chapter 1—Welcome to Sage Estimating

Sage is pleased to welcome you as a client. If you are new to Sage Estimating, or you want to know how to use this new release, read this booklet to find out how Sage Estimating can help you create, organize, manage, and analyze hundreds of estimates.

Sage Estimating gives you the flexibility, speed, and accuracy to generate competitive estimates, bids, and budgets. An innovative spreadsheet interface is supported by fast takeoff tools, a comprehensive price database, and a wide range of ways to analyze and fine-tune your project.

About This Booklet

This booklet covers the following topics:

- Get Help—a discussion of the Help system and useful contact information.
- Learn Basic Concepts—the concepts and philosophy behind Sage Estimating.
- Create a New Estimate—learn how to create a new estimate.
- Perform Takeoff—instructions for copying information from a standard database into an estimate.
- Work with the Spreadsheet—learn how to navigate the Sage Estimating spreadsheet.
- Print Reports—learn how to prepare and print reports.
- Use Address Book—learn how to set up the Estimating Management Console Address Book to store contact information.
- Advanced Features—learn how to use advanced Sage Estimating features.

Ways to Get Help

Use Sage Estimating Help or the Sage Customer Portal to get answers to your questions. You can also call Customer Support. See below for more information.

The Help System

Sage Estimating's efficient Help system provides faster access to more information than most manuals. With a click of the mouse or a keystroke, you can easily get Help for a command, a field, a window, or a procedure.

To get Help on a window option

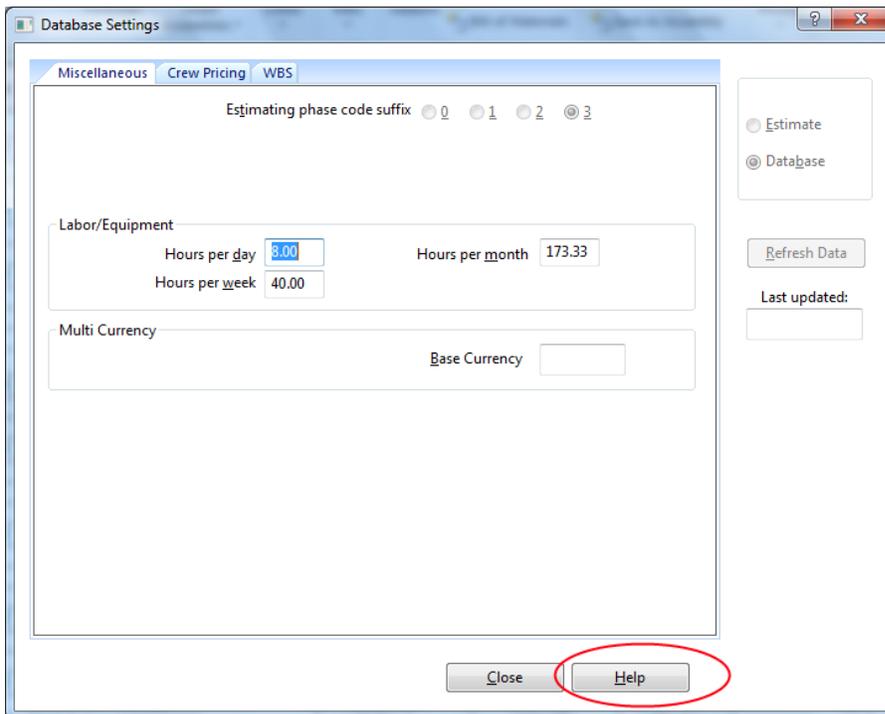
Help is available on virtually every option within a window. To access the Help, do one of the following:

- Click  What's This? on the toolbar or on the title bar, and then click the option.
- Select What's This? from the Help menu, and then click the option.
- Select the option, and then press F1.

To get Help for the whole window

For information about the window, such as the window's purpose and what tasks you can perform in it, click [Help] at the bottom of the window.

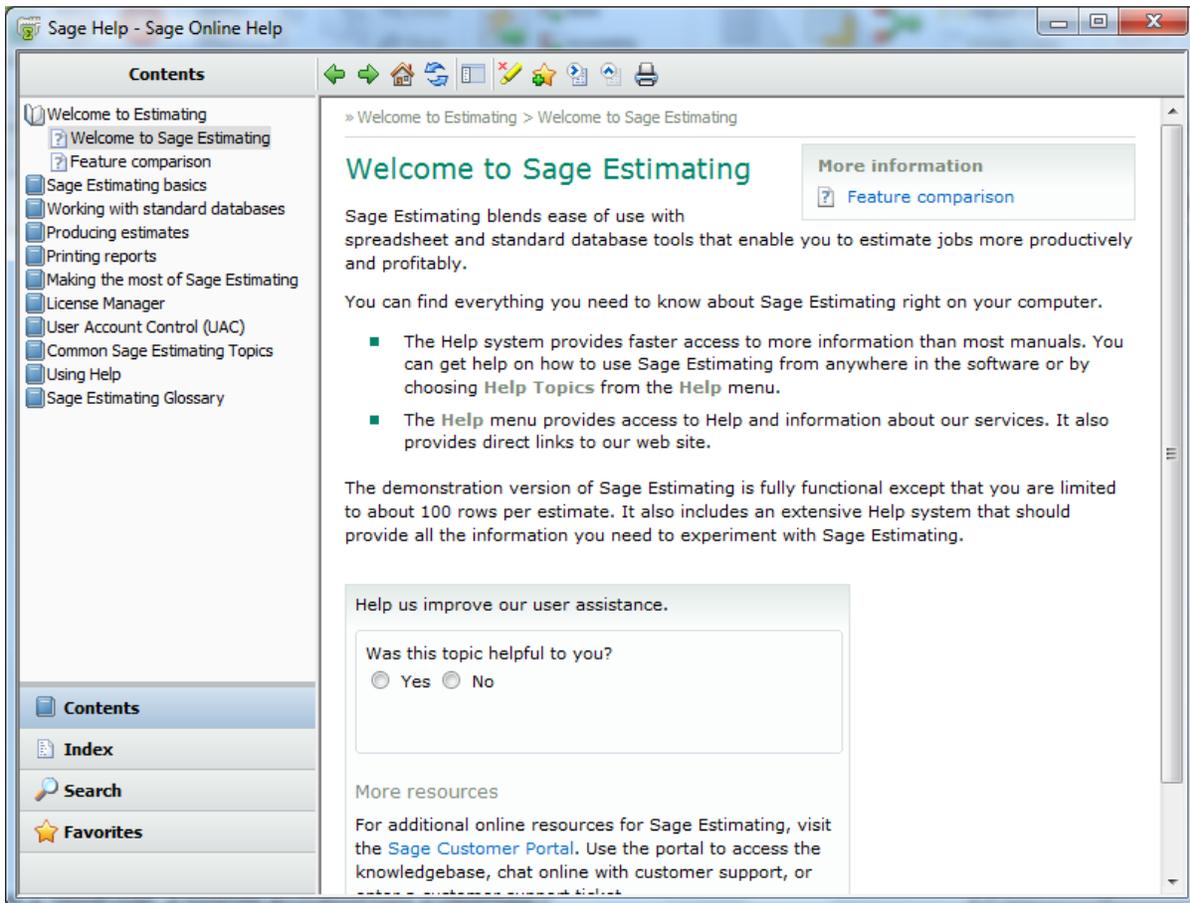
Figure 1: The Window Help Button



To use Help to learn how to do tasks

- 1  Click [Help] on the toolbar or select Home tab > Help group > Help (or select Help menu > Help topics in classic view).

Figure 2: The Help Window



- 2 Select one of four tabs on the navigation pane to begin looking for a topic.
 - Contents contains Help subjects organized within books.
 - Index contains an alphabetical list of Help subjects.
 - Search looks through every word in Help to find matches for your search query.
 - Favorites contains Help topics you have previously flagged as favorites. This tab lets you find specific Help topics quickly.

When you see the topic you want, double-click it to display it.
- 3 Use the buttons on the toolbar to:
 - Move back and forth between topics you have already read.
 - Return to the introductory topic.
 - Refresh the displayed topic.
 - Hide or display the navigation pane.

- Hide or display key word highlighting.
- Add a Help topic to the Favorites page.
- Print the current topic.

Read the Supporting Documentation Before You Begin

Be sure to read supporting documentation before you begin:

- This *Getting Started Guide* provides an operational overview of the Sage Estimating software.
- The *Installation and Administration Guide* includes an overview of this release, installation instructions, system requirements, and contact information. This document is available in your Sage Estimating installation files in the Documents folder.
- The *Release Notes* provide details about new features, database changes, known issues, and fixes. This document is available in your Sage Estimating installation files in the Documents folder.
- The *SQL Server Guide* gives you an overview of the significant differences between the new SQL Server databases and the Pervasive databases used in previous Sage Estimating releases. This document is available in your Sage Estimating installation files in the Documents folder.
- The *Options Guide* provides installation, setup, and operating instructions for each of the available Sage Estimating options, such as the OnScreen Takeoff Integrator or License Manager. This document is available in your Sage Estimating installation files in the Documents folder.

Conventions Used in this Document

This document uses the following conventions:

- Information you type into the software is shown in bold font. For example: Type **Miscellaneous** in the box.
- The names of screens, windows, fields, and other features displayed by the software are shown in bold font.
- The names of buttons you can click are enclosed in brackets with bold font. For example: **[OK]** or **[Post]**.
- Names of keys are shown in capital letters. For example: ENTER or TAB. A plus sign (+) between two key names indicates you should press the keys simultaneously.
- Variable names or names that are specific to your installation may appear in italics and brackets. For example: [*Drive*][*Server*].

Symbols



NOTE: This symbol is used when presenting information that is supplemental to the adjacent text.



TIP: This symbol is used when presenting helpful information for using the software.



CAUTION: This symbol is used when presenting important information to help you avoid a loss of critical data.



IMPORTANT: This symbol is used when presenting information that is critical to understand or that requires you to take action.

Menu Paths

In this document, menu paths show you the steps required to start a task. Menu paths appear in bold font with angle brackets around buttons. For example:

"If the program does not automatically start, click [**Start**] > Run."

Training

Sage University offers online and classroom training sessions to help you get the most out of your Sage Estimating software. To access Sage University, visit www.sageu.com.

You can also get access to Sage University from the File menu by selecting Help > Sage Estimating on the Web > Sage University.

Technical Assistance

When you need assistance, refer to the Knowledgebase article [How do I get technical support for Sage Estimating?](#) to determine which service works best for you.

Submitting Enhancement Requests

We want to hear your suggestions for improving the software. To send us your comments, click on the File menu button  and then select Help > Sage Estimating on the Web > Submit Enhancement Requests.



Chapter 2—Learning Basic Concepts

Sage Estimating Ribbon Layout

Sage Estimating uses a "ribbon" layout instead of a menu layout.

The ribbon menu replaces the conventional "classic view" menu layout found in previous releases. The ribbon layout functions by grouping similar tasks onto the same tab. For example, tasks related to the estimate spreadsheet, such as those for modifying the spreadsheet layout, are found on the Home tab as shown in the following figure.

Figure 3: The New Ribbon Layout



Tasks are further grouped within each tab according to functionality. Takeoff functions, for example, are found in the Takeoff group of the Home tab.

Double-click any tab on the ribbon (Home, Database, Interface, or View, for example) to collapse the ribbon and save space. The collapsed ribbon appears as shown in the following figure.

Figure 4: Collapsed View of the Ribbon



Ribbon tabs remain visible while the ribbon is collapsed. Hover the cursor over any tab on the collapsed ribbon if you want to view the ribbon contents.

Double-click any tab again to expand the ribbon.

Classic View

If you prefer to use the "classic view" menu convention instead, perform the following steps:

- 1 Start Sage Estimating.
- 2 Click the File menu button , and then click Options on the menu.
- 3 On the Sage Estimating Options window that appears, select the Use classic menu bar controls check box.
- 4 Restart the Sage Estimating software for your changes to take effect.

Working With the Database and Estimates

Sage Estimating stores your estimating information in three places:

- **Estimate database:** Stores your individual project estimates and security settings. Each estimate contains information for a specific project, such as the projected cost, quantity of material, labor, equipment, subcontractors, and other items.
- **Standard database:** Contains a catalog of information for use with estimates, such as a list of items and assemblies, prices, calculation methods, and conversions. This database functions as a "resource book."

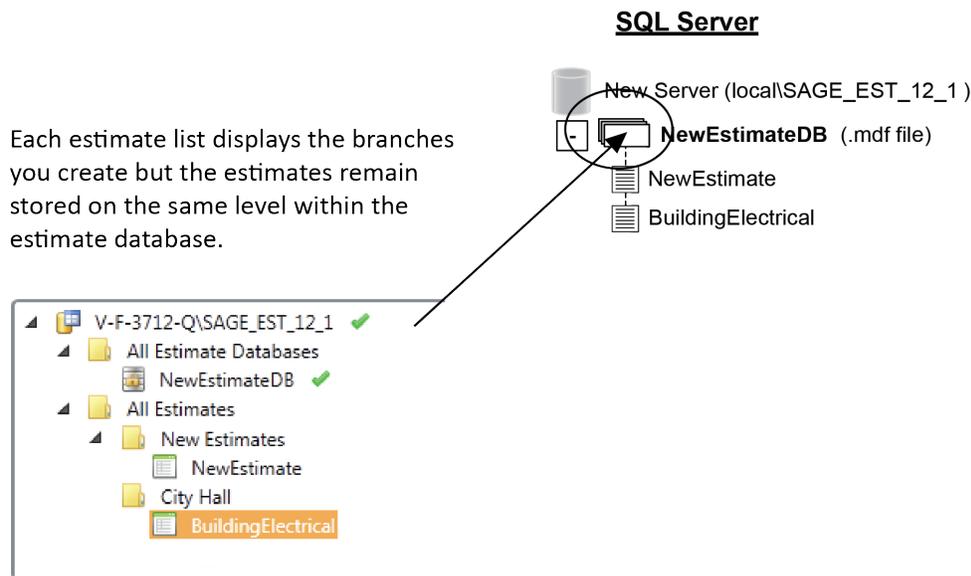
The standard database and estimates are completely separate. If you update the standard database, information in the estimate remains unchanged. Similarly, if you change the estimate, the standard database is not automatically affected. You can update an estimate with price changes made in the standard database (or a standard database with changes made in the estimate) by selecting the Reprice Estimate (or Update Database) option.

- **Address Book database:** Stores all your contact information for individuals and organizations.

Learning About the Estimate Database

The estimate database stores your estimates. You can organize estimates according to "branches" or tiers. The estimate branches and estimate sub-branches you create are for display purposes only; the structure of your estimate database does not actually change.

Figure 5: Storing Estimates in the Estimate Database



The Estimating Management Console secures the estimate database by enabling record security automatically. You can uninstall the record security if desired. For more information about estimate database record security, see the Estimating Management Console in-product Help.

Learning About Estimates

In essence, the Sage Estimating spreadsheet is the estimate. It presents the items, quantities, and monetary amounts that make up an estimate, in a format designed specifically for estimating. Changes you make to your estimates are saved to the designated estimate database automatically as you work.

Viewing Estimate Information

The spreadsheet window is the primary place where you view estimate information. From there, you can open other windows to see totals for the estimate or the details associated with each item.

In the spreadsheet, you control the placement of columns, whether they are visible, and even what labels appear in the column header. You can also use a spreadsheet layout when you create estimate reports.

Figure 6: The New Layout

Group	Phase	Description	Takeoff Quantity	Labor Cost/Unit	Labor Price	Labor Amount	Material Price	Material A
1000.000		GENERAL CONDITIONS						
	1300.010	Personnel: Supervision						
		Superintendent	wk		40.00 /hr		-	
		Superintendent	wk		40.00 /hr		-	
		Superintendent	72.00 wk	1,600.00 /wk	40.00 /hr	115,200	-	
	1510.010	Utilities: Temporary						
		Temp Electricity	mo	-	-	-	-	
		Temp Electricity	8.00 mo	-	-	-	-	
		Temp Heat	mo	-	-	-	-	
		Temp Heat	mo	-	-	-	-	
		Temp Phone	mo	-	-	-	-	
		Temp Phone	16.00 mo	-	-	-	-	
		Temp Water	mo	-	-	-	-	
		Temp Water	8.00 mo	-	-	-	-	
		Temp Toilet	mo	-	-	-	90.00 /mo	
		Temp Toilet	16.00 mo	-	-	-	90.00 /mo	
	1510.020	Utilities: Final						
		Final Electricity	mo	-	-	-	-	
		Final Electricity	8.00 mo	-	-	-	-	
	1520.030	Temp: Office Supplies						
		Job Sign	ea		20.00 /hr		60.00 /ea	
		Job Sign	8.00 ea	60.00 /ea	20.00 /hr	480	60.00 /ea	

(In classic view, the spreadsheet appears as follows:)

Figure 7: Classic View Layout

Group	Phase	Description	Takeoff Quantity	Labor Cost/Unit	Labor Price	Labor Amount	Material Price	Material Amount
1000.000		GENERAL CONDITIONS						
	1300.010	Personnel: Supervision						
		Superintendent	wk		40.00 /hr		-	
		Superintendent	wk		40.00 /hr		-	
		Superintendent	72.00 wk	1,600.00 /wk	40.00 /hr	115,200	-	
	1510.010	Utilities: Temporary						
		Temp Electricity	mo	-	-	-	-	
		Temp Electricity	8.00 mo	-	-	-	-	
		Temp Heat	mo	-	-	-	-	
		Temp Heat	mo	-	-	-	-	
		Temp Phone	mo	-	-	-	-	
		Temp Phone	16.00 mo	-	-	-	-	
		Temp Water	mo	-	-	-	-	
		Temp Water	8.00 mo	-	-	-	-	
		Temp Toilet	mo	-	-	-	90.00 /mo	
		Temp Toilet	16.00 mo	-	-	-	90.00 /mo	
	1510.020	Utilities: Final						
		Final Electricity	mo	-	-	-	-	
		Final Electricity	8.00 mo	-	-	-	-	
	1520.030	Temp: Office Supplies						
		Job Sign	ea		20.00 /hr		60.00 /ea	
		Job Sign	8.00 ea	60.00 /ea	20.00 /hr	480	60.00 /ea	
	1540.010	Temp: Tools & Equipment						
		Tools & Equipment	mo		20.00 /hr		##### /mo	
		Tools & Equipment	16.00 mo	400.00 /mo	20.00 /hr	6,400	2,400.00 /mo	

Learning About The Standard Database

The database contains all the standard cost items you use, including item productivity factors, waste factors, and prices. In addition, there are phases for organizing items, formulas for calculating quantities, assemblies for taking off groups of items, subcontractors, crews, work breakdown structures, and markups for adding special costs to the estimate.

Without a standard database, you would have to enter information over again for every estimate. But if you set up a standard database, you can enter the information once and find just what you need for each estimate. You can copy information from the standard database into the estimate (a process known as *takeoff*), and enter dimensions and specifications as required.

Accessing the Standard Database From the Estimate

You can quickly access the standard database while you are working on an estimate. This lets you change or add new information to the standard database without closing the estimate. While changes made in the standard database do not affect items that are already in the estimate, the new information appears in the estimate the next time you perform takeoff.

Learning About the Address Book Database

The Address Book database stores contact information, such as address, email, and phone numbers, for individuals and organizations in estimates. You set up your Address Book contacts using the Address Book window in Sage Estimating.

Refer to [“Chapter 7—Using Address Book” on page 31](#) for more information about creating Address Book contacts.



Chapter 3—Creating a New Estimate

Creating a New Estimate

When you create a new estimate, you specify an estimate name, the associated standard item database (if desired), and an organizational "branch" where you want to display the estimate.

You can create a new estimate from the Sage Estimating software by clicking New (Estimate group of the Home tab) or by selecting the Estimate tab of the Estimating Management Console.



NOTE: In classic view, use the File menu to select the new estimate command.



IMPORTANT: Before you create estimates, you must create the estimate database (using the configuration wizard) for storing your estimates.

To create a new estimate:

- 1 In the Sage Estimating main window, select New from the Estimate group of the Home tab. This opens the New Estimate window.

Figure 8: The New Estimate Window

Use this window to create a new estimate. Type a unique name for the estimate and select the estimate database where you want the estimate to be stored.

You may also select a standard database to associate with the estimate, if desired, and the estimate database branch where you want the estimate to be displayed.

The current server where the new estimate is stored.

V-F-3712-Q\SAGE_ESTIMATING0

Enter a name for the new estimate.

New Estimate

Choose a database to associate with the new estimate (optional).

SampleExtendedCommercialConcreteMasonry Clear

Choose or browse to the branch where you want your estimate displayed.

All Estimates Browse Reset

OK Cancel Help

Alternatively, if you are using classic view, click New Estimate on the File menu to open this window.

2 In the New Estimate window, specify the following estimate information:

- A name for the new estimate
- The standard item database you want to associate with the new estimate, if desired. Sage Estimating opens the selected database automatically whenever you open the estimate.
- The branch in the My Estimates pane of the Estimating Management Console where you want the estimate displayed.

NOTE: Estimates are displayed in the Estimating Management Console according to tiers or "branches" that you create. These branches are for organizational purposes only. The structure of your database does not change.

3 Click [OK]. The Sage Estimating software creates the new estimate and opens the Estimate Information window.

4 Complete the fields on the tabs of the New Estimate window. At a minimum, edit or accept the project name displayed in the Project field.

The Job size field is required if you want Sage Estimating to calculate the cost per unit for the job in the Totals window.

5 When you finish entering information about the estimate, click [OK].

6 If desired, you can also click the File menu button  to start a new estimate from scratch, create a duplicate of an existing estimate, or merge several existing estimates into one new estimate.



Chapter 4—Performing Takeoff

Performing Takeoff

After you create an estimate, you select items and specify their estimated quantities. You can enter takeoff quantities or have Sage Estimating calculate them for you. When you perform takeoff, Sage Estimating copies everything associated with the selected items into the estimate and calculates their takeoff quantities.

Quick Takeoff

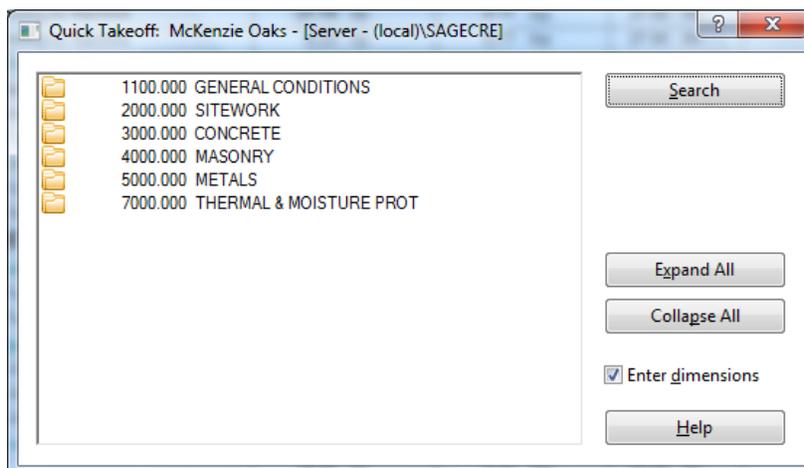
Quick takeoff is a fast, easy way to get items into your estimates. You have the option to specify takeoff quantities before or after items are in the spreadsheet. Once there, you can specify the item quantities by:

- Using the formula attached to each item.
- Using the Sage Estimating or Microsoft Windows calculator.
- Using one value to fill in other quantities.
- Using Enter Dimensions.
- Making manual entries.

To perform quick takeoff:

- 1 Click [Quick] in the Takeoff group of the Home tab to open the Quick Takeoff window.

Figure 9: The Quick Takeoff Window



In classic view, select Takeoff menu > Quick Takeoff or click the Quick Takeoff icon on the toolbar.

- 2** (Optional) To view the default location and WBS settings in the Item Takeoff Settings window, select the Item Takeoff Settings check box in the Show/Hide group of the View tab. (In classic view, select View menu > Default Location/WBS.)

The Item Takeoff Settings window appears at the bottom of the screen. Use this window to set a location and work breakdown structure (WBS) for your takeoff items.

- 3** Select an item and take it off using one of the following methods:
- Locate the item in the list and then double-click (or drag and drop) the item to take it off.
 - Click [Search] to open the Search field, in which you can enter search criteria for the item. After you find it, double-click (or drag and drop) the item to take it off.
 - Right-click and select Sort item list by then select an option from the drop-down list to organize the list in a different sort order. You can sort by phase/item or description. You can also use a custom sort based on WBS codes. Locate the item in the list and then double-click (or drag and drop) the item to take it off.
- 4** Take off additional items in the same manner. You can select multiple items in the list.
- 5** Enter or calculate the item takeoff quantities. To calculate quantities you can:
- Use the calculator.
 - Use formulas.
 - Manually enter quantities.
- 6** You can also right-click in the takeoff Quantity column to select these additional options:
- Use Enter Dimensions. This option is only available after you use your mouse to select multiple cells in the Quantity column.



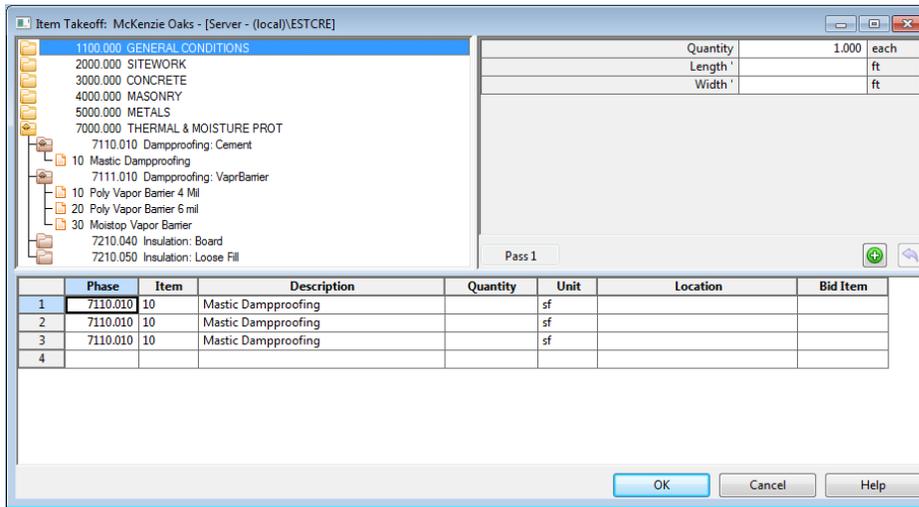
Item Takeoff

Item takeoff is a convenient way to take off groups of items and quickly calculate their takeoff quantities. You can review items and modify them for use in the current estimate before you generate them to the spreadsheet.

To perform item takeoff:

- 1** Click [Item] in the Takeoff group of the Home tab to open the Item Takeoff window.
- If you are using classic view, select Takeoff menu > Item Takeoff or click on the Item Takeoff icon in the toolbar.

Figure 10: The Item Takeoff Window



- (Optional) To view the default location and WBS settings in the Item Takeoff Settings window, select the Item Takeoff Settings check box in the Show/Hide group of the View tab. (In classic view, select View menu > Default Location/WBS.)

The Item Takeoff Settings window appears at the bottom of the screen. Use this window to set a location and work breakdown structure (WBS) for your takeoff items..

- Select an item and take it off.
- (Optional) Right-click on the item list and select Sort item list by to organize the list in a different sort order. Or select Search to find a specific item in the list.
If you have formulas assigned to your takeoff items, Sage Estimating displays the variables (dimensions and specifications) for them in the variable pane.
- Enter the item takeoff quantities in the takeoff grid.
- Review the items in the takeoff grid. If necessary, you can change an item description, change item details, delete an item from the grid, and save the items as an assembly.
- Click [OK] to generate the items to the spreadsheet.



Assembly Takeoff

You can streamline the takeoff process by taking off assemblies. For example, instead of taking off each item that makes up a standard-sized wall, you can take off an assembly containing all the items needed to construct the wall.

To perform assembly takeoff:

- Click [Assembly] in the Takeoff group of the Home tab to open the Assembly Takeoff window.
In classic view, select Takeoff menu > Assembly Takeoff. .

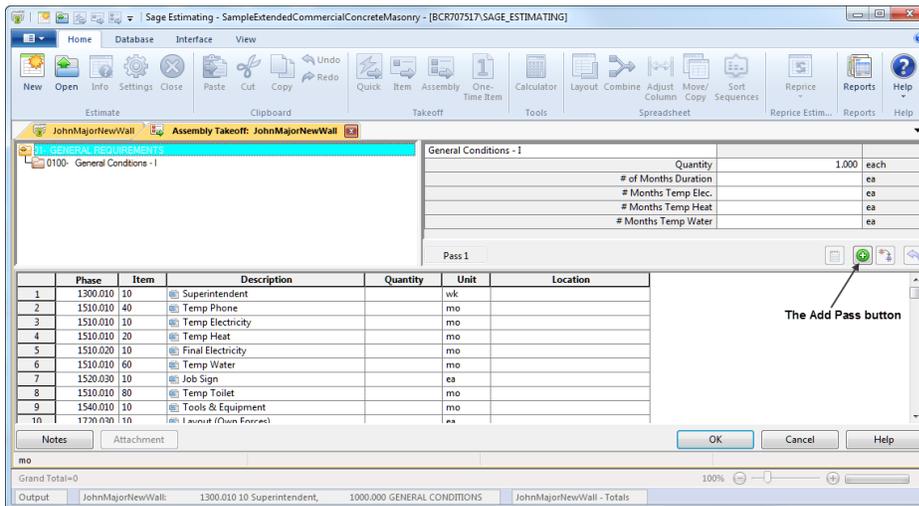
- 2 (Optional) To view the default location and WBS settings in the Item Takeoff Settings window, select the Item Takeoff Settings check box in the Show/Hide group of the View tab. (In classic view, select View menu > Default Location/WBS.)

The Item Takeoff Settings window appears at the bottom of the screen. Use this window to set a location and work breakdown structure (WBS) for your takeoff items.

- 3 Select an assembly and take it off.

If you use formulas in your assemblies, Sage Estimating displays the variables (dimensions and specifications) for the assembly in the variable pane.

Figure 11: The Assembly Takeoff Window



- 4  Enter the variable amounts in the variable pane or enter a takeoff quantity in the takeoff grid. Click [Add Pass] to calculate quantities for items with formulas.
- 5 Review the items in the takeoff grid. If necessary, you can change an item description, change item details, add an item to the assembly, delete an item from the grid, or substitute an item in the grid.
- 6 When you are ready to generate the assembly to the spreadsheet, click [OK] in the Assembly Takeoff window.

Review Assemblies

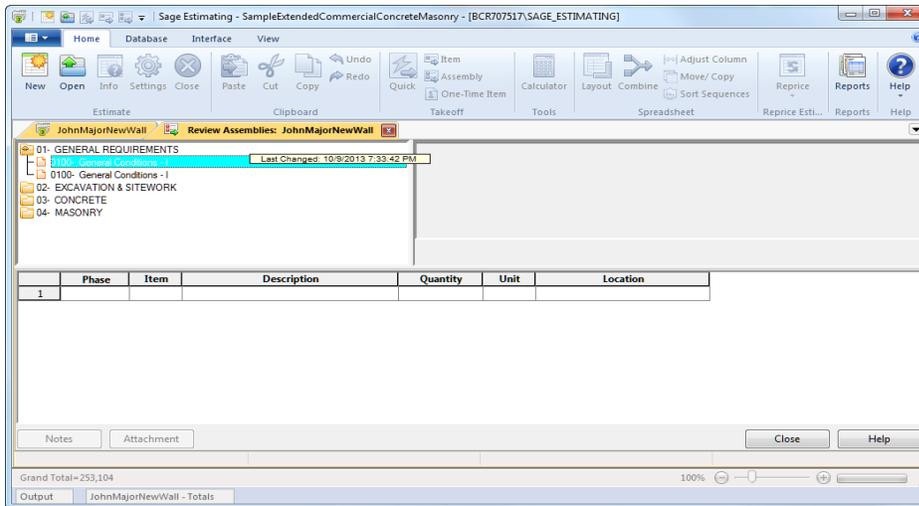
You can review and change assemblies already in the estimate. Sage Estimating tracks all of the passes generated during assembly takeoff and lets you:

- Check the dimensions entered for each pass.
- Change dimensions and make additional passes for the same items.
- Change dimensions and replace existing passes.
- Add or delete items.
- Attach a note to any pass.

To review a pass

- 1 Click [Assembly] in the Takeoff group of the Home tab.
In classic view, select Review Assemblies from the Takeoff menu or click the Assembly Takeoff icon in the toolbar.
- 2 Right-click in the upper-left pane, and then select Review Assemblies.

Figure 12: Reviewing Assemblies from the Assembly Takeoff Window



- 3 Double-click the pass that you want to review.

To revise an existing pass

- 1 In the variable pane, change the dimensions in the Quantity, Length, and Width boxes.
- 2  Click [Replace Pass] to revise the existing pass.
- 3 Click [OK] to send the changes to the spreadsheet.

NOTE: You can also add a pass [Add Pass], add notes to a pass [Pass Note], or undo a pass [Undo Last Pass] that has not yet been generated to the spreadsheet.

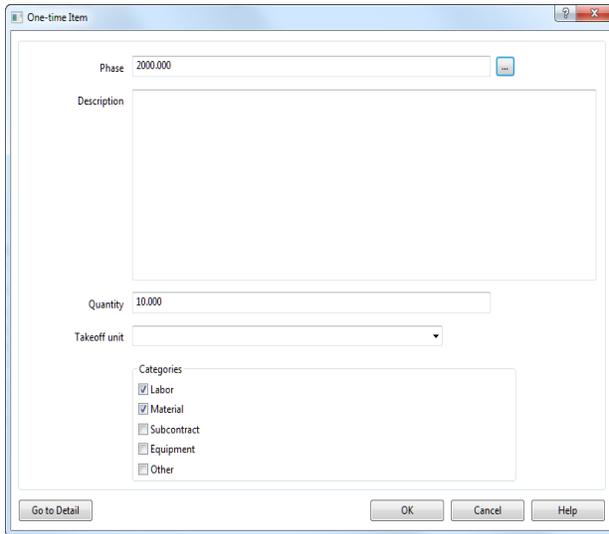
One-Time Item Takeoff

One-time items are items that do not already exist in your database. They may be unusual items that you want to include in an estimate without first having to set them up in the database.

To perform one-time item takeoff:

- 1 Click [One-Time Item] > in the Takeoff group of the Home tab. The One-time Item window opens.
In classic view, select Takeoff menu > Takeoff Tools > One-Time Item or click the One-Time Takeoff icon in the toolbar.

Figure 13: The One-Time Item window



- 2 Complete the fields in the window. At a minimum, you need to complete the Phase, Description, and Takeoff unit fields to set up a one-time item.
- 3 (Optional) Click [Go to Detail] to enter more information about the item.
- 4 When you finish setting up the item, click [OK] in the One-time Item window. The item appears on the spreadsheet or in the takeoff grid if you are taking off a one-time item from the Item Takeoff window. Hyphens in the Item column (---) identify a one-time item in the spreadsheet. If you did not select [Go to Detail] in step 3, you can enter details directly to the item in the spreadsheet.

NOTE: Depending on your role (assigned in Estimating Security), you may be able to add one-time items to your database by selecting [Save One-Time Items] from the Update Database group of the Database tab (or, in classic view, select Pricing menu > Update Database > Save One-time Items to Database).



Chapter 5—Working with the Spreadsheet

The Spreadsheet Window

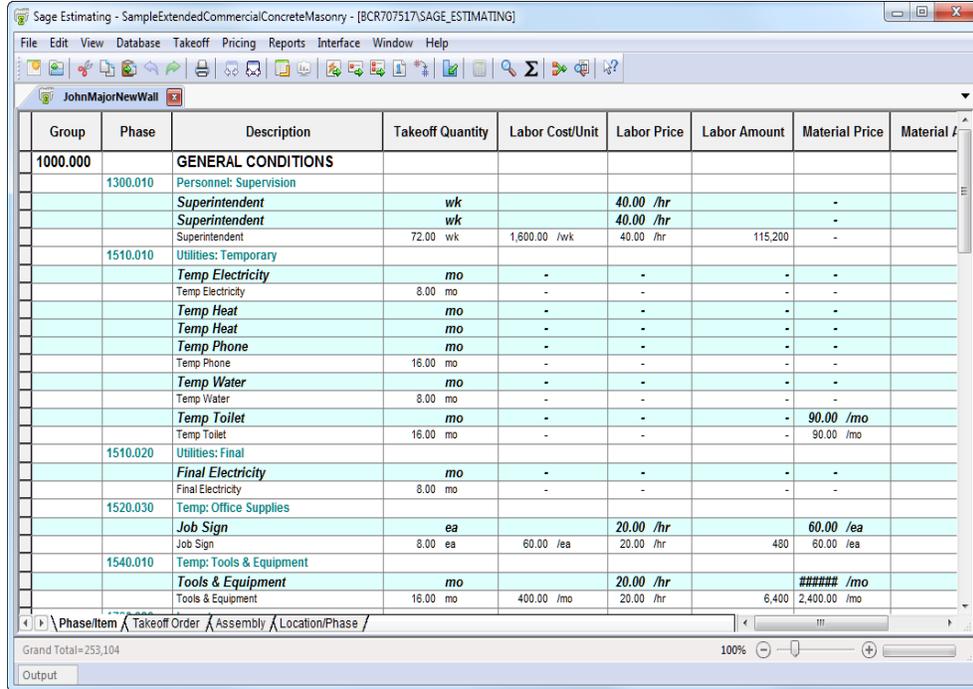
The spreadsheet window contains columns with the quantities and category information for all items in the estimate.

Figure 14: The Spreadsheet Window

Group	Phase	Description	Takeoff Quantity	Labor Cost/Unit	Labor Price	Labor Amount	Material Price	Material Amount
1000.000		GENERAL CONDITIONS						
	1300.010	Personnel: Supervision						
		Superintendent	wk		40.00 /hr		-	
		Superintendent	wk		40.00 /hr		-	
		Superintendent	72.00 wk	1,600.00 /wk	40.00 /hr	115,200	-	
	1510.010	Utilities: Temporary						
		Temp Electricity	mo	-	-	-	-	
		Temp Electricity	8.00 mo	-	-	-	-	
		Temp Heat	mo	-	-	-	-	
		Temp Heat	mo	-	-	-	-	
		Temp Phone	mo	-	-	-	-	
		Temp Phone	16.00 mo	-	-	-	-	
		Temp Water	mo	-	-	-	-	
		Temp Water	8.00 mo	-	-	-	-	
		Temp Toilet	mo	-	-	-	90.00 /mo	
		Temp Toilet	16.00 mo	-	-	-	90.00 /mo	
	1510.020	Utilities: Final						
		Final Electricity	mo	-	-	-	-	
		Final Electricity	8.00 mo	-	-	-	-	
	1520.030	Temp: Office Supplies						
		Job Sign	ea		20.00 /hr		60.00 /ea	
		Job Sign	8.00 ea	60.00 /ea	20.00 /hr	480	60.00 /ea	

(In classic view, the spreadsheet window appears as follows:)

Figure 15: The Spreadsheet Window in Classic View



Spreadsheet Window Ribbon

The spreadsheet window provides a "ribbon" above the spreadsheet for easy access to the common commands as described below. For information about accessing these commands using keyboard shortcuts, refer to the appendix.

NOTES:

- The ribbon is not available in classic view. Instead, these commands are available in the "classic view" menu format or in a toolbar at the top of the window.
- In this booklet, instructions that include these commands often include a picture of the icon as well.

Table 1: Frequently-Used Spreadsheet Icons

Icon	Command	Purpose
	Expand	Displays the spreadsheet with one more level of detail.
	Collapse	Displays the spreadsheet with one less level of detail.

Icon	Command	Purpose
	Layout	Lets you create, modify, delete, or apply a custom layout to the spreadsheet.
	Quick	Perform takeoff directly from the item list. Available only when a database is open.
	Item	Opens the Item Takeoff window, in which you choose the items and specify their takeoff quantities. Available only when a database is open.
	Assembly	Opens the Assembly Takeoff window, in which you choose an assembly and specify the takeoff quantities for its items. Available only when a database is open.
	One-time Item	Creates a one-time item for the current estimate. You enter the phase, description, takeoff quantity, unit, and categories.
	Combine	Lets you combine matching items in the spreadsheet.
	Scan Estimate	Lets you find incomplete items in the spreadsheet.
	What's This?	Displays Help for a button, command, or window.



Changing the Appearance of the Spreadsheet

The spreadsheet includes over 100 columns of information. Sage Estimating makes it easy for you to adjust the appearance of the spreadsheet to suit your needs.

You decide:

- Which columns are visible and where they are positioned.
- What names appear as column headers and how wide each column is.
- Whether you want to organize items by phase, location, takeoff order, assembly, or a customized spreadsheet sequence.
- Whether to share the layout with all Estimating users, or keep it for your exclusive use.
- How many levels of detail you want to see.
- What fonts and colors are used for text and numbers.

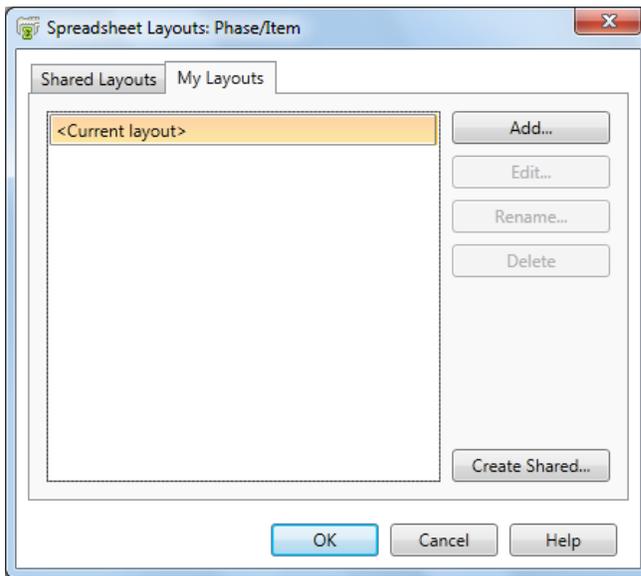
In addition, you can set up an unlimited number of layouts. For example, you can design a labor-only layout or a material-only layout.

To set up a spreadsheet layout:

- 1 Click [Layout] in the Spreadsheet group of the Home tab (or, in classic view, select View > Spreadsheet Layout) to open the Spreadsheet Layouts window.

This window lists the layouts set up for the current spreadsheet sequence.

Figure 16: Selecting a Spreadsheet Layout for Modification



- 2 Click a button in the Spreadsheet Layouts window to continue.
 - To set up a new layout, click [Add] and type a name for the new layout to add it to the list.
 - To modify an existing layout, select the layout in the list and click [Edit] to set the options in the Modify Spreadsheet Layout window.
 - To rename a layout, select an existing layout from the list and click [Rename].
 - To delete a layout from the list, select the layout in the list and click [Delete].

- 3 Set the options in the Modify Spreadsheet Layout window.
 - To show a column in the spreadsheet, select the corresponding Visible check box.
 - To hide a column, clear the corresponding Visible check box.
- 4 Click [OK] to save the spreadsheet layout and close the Modify Spreadsheet Layout window.

Changing Item Prices and Quantities

As you work on an estimate, you can change prices and quantities to reflect the latest information. For example, you can enter quotes for materials.

To change prices and quantities:

- 1 On the spreadsheet, click the appropriate category Price cell for the item. For example, to enter a quote for an item's material price, click the Material Price cell.
- 2 Enter the new price.
- 3 If other items in the spreadsheet are linked to this item, the following question appears: Would you like to update prices for linked items?
 - Click [Yes] to change the prices of linked items too.
 - Click [No] to change the price of this item only.
- 4 If the spreadsheet contains duplicates of this item, the following question appears: Would you like to update prices for duplicate items?
 - Click [Yes] to change the prices of duplicate items too.
 - Click [No] to change the price of this item only.



Finding Incomplete Items

To make sure your estimate is complete, you can scan it for missing takeoff quantities, prices, amounts, or subcontractor names (if an item has a subcontract amount).

To scan for incomplete items:

- 1 Position the cursor anywhere on the spreadsheet.
- 2 Click [Scan Estimate] from the Window group of the View tab.
(If you are using classic view, Pricing menu > Scan, or click the scan button on the toolbar.)
- 3 Sage Estimating stops at the first cell that is empty or contains a zero. Fill in the missing quantity, amount, price, or subcontractor name. If you need to do more research before you supply a value, leave the cell blank for now.
- 4 Repeat step 2 until no more incomplete entries are found. (When Sage Estimating reaches the bottom of the spreadsheet, it resumes scanning from the beginning of the spreadsheet.)

The Detail Window

The Detail window lets you view the information about a row in the estimate spreadsheet or takeoff grid. This window contains information about the selected spreadsheet row as specified for the estimate. Sage Estimating saves your entries when you click [OK]. Changes you make are saved with the estimate and do not affect the database.

To open the Detail Window:

- 1 Select the Detail window check box from the Show/Hide group of the View tab (or, in classic view, select View menu > Detail Window).
- 2 Alternatively, you can open the Detail window by right-clicking on a cell and selecting Detail Window or by pressing CTRL+D from the keyboard.

Figure 17: Editing Item Details

	Convert	Order Qty	Unit Price	Amount
Labor		0.518 hrs		14.00
Material				
contract				
quipment				
Other				

Location: Waste: % Sequence:

Date:

Time:

	Name	Description
	Crew	
	Labor Rate Table	
	Equipment Rate Table	

The Totals Window

The Totals window shows a summary of the cost category and estimate totals. It also lets you include addon costs (markups) in the estimate.

To open the Totals window:

- 1 Select the Totals check box from the Show/Hide group of the View tab or press F4 (or, in classic view, select Takeoff menu > Estimate Totals).

The Totals window opens. You can see the totals for each cost category, markup, and subtotal along with the total cost of the estimate.

Figure 18: Viewing the Totals Window

Description	Amount	Totals	Hours	Rate	Allocatable	Cost Basis	Cost per Unit	Percent of Total
Labor	42,757		1,577.500 hrs					27.15%
Material	72,947							46.32%
Subcontract								
Equipment	88		1.032 hrs					0.06%
Other								
	115,792	115,792						73.53
Profit % of Bottom Line	10,236			6.500 %	<input type="checkbox"/>	Total		6.50%
Overhead % of Bottom Line	3,937			2.500 %	<input checked="" type="checkbox"/>	Total		2.50%
Labor Burden	15,713			36.750 %	<input checked="" type="checkbox"/>	Category		9.98%
Bond	1,561				<input checked="" type="checkbox"/>	Bond		0.99%
Sales Tax % of Total Job	10,236			6.500 %	<input type="checkbox"/>	Total		6.50%
Total		157,475						

- 2 To print the totals, click the print icon on the toolbar. If the toolbar does not appear, click [Show Toolbar].

Formatting the Totals Window

You can format the Totals window to change its visual appearance. You can also hide fields to prevent them from printing on reports. Any layout changes you make to the window print on your report if the option to print totals is selected on your report.

To format a column in the Totals window

- 1 With the Totals window open, right-click on a column heading and select Format Column. The Format Column window appears.
- 2 Make changes to the column. Changes you can make include:
 - ▣ Column name
 - ▣ Column width
 - ▣ Alignment
 - ▣ Number of decimals
 - ▣ Background color
 - ▣ Font
- 3 Click [OK] to save your column changes.

You can also format rows or individual cells. To format a row, right-click on the row header and select Format [row name] Rows. To format a cell, right-click in the cell and then select Format Cell.

To hide a column on the Totals window

Hiding columns prevents them from showing up on reports, but does not remove the amounts from the totals.

- 1 With the Totals window open, right-click on a column heading and select Hide On Reports.

- 2 If you receive a warning that hidden numbers may cause some totals to appear incorrect, click [OK]. (This does not mean the numbers are incorrect, only that they may appear to be, because numbers that are used in the total calculation are not visible.)
- 3 Click [OK].

You can also hide rows or individual cells. To hide a row, right-click on the row header and select Hide on Reports. To hide a cell, right-click in the cell and then select Hide on Reports.

To insert addons in the Totals window

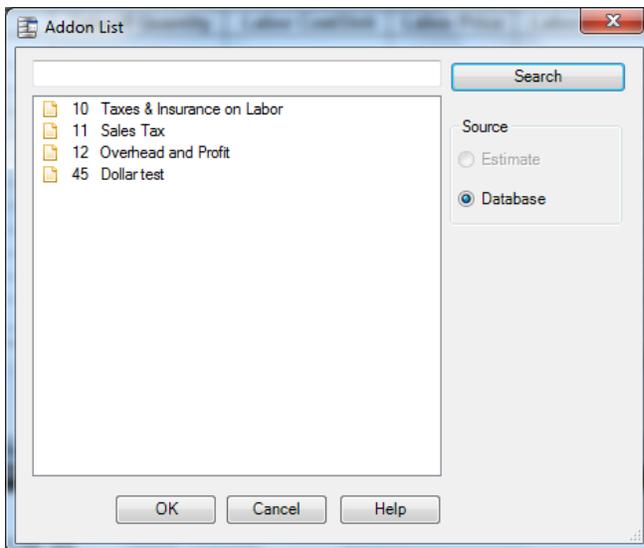
Addons represent the additional cost or markup that contractors add to their estimates. It is cost over and above the actual cost to contractors and represents their indirect costs and budgeted profit. Types of addons include overhead, taxes, profit, and other costs.

You can choose addons for the estimate before or after takeoff. Some estimators like to set them up before takeoff so that they can see how the overall estimate is shaping up as they work.

Where you insert each addon determines which estimate costs are used to calculate the addon amount. An addon should come after the subtotals and addons you want to include. This is especially important for addons based on subtotals.

- 1 Click on the row header where you want to create the addon.
- 2  Click [Insert Addon].

Figure 19: The Addon List Window



- 3 Double-click the addon to select it.
You can select multiple addons if necessary.
- 4 When finished, click [Close].
- 5 Click [OK].

To insert subtotals

Where you insert a subtotal determines which estimate and add-on costs it includes. Each subtotal is the sum of the previous subtotal (if any) and the amounts between it and the previous subtotal.

For example, if the previous subtotal was \$200 and a total of \$100 appears between it and the next subtotal line, the next subtotal amount is \$300.

- 1 Right-click on the row header where you want the subtotal to appear.
- 2 Select Insert Subtotal.
- 3 (optional) Type a description in the Description column.

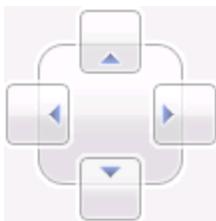
Docking the Totals window

You can dock and position the Totals window within Estimate window to make it easy to work in both areas at the same time.

To select a docking option, "grab" the Totals window toolbar and reposition it:

- You can position the window so that it "floats" on top of an estimate by dropping it at any location in the main window.
 - If you have multiple estimates open, the window shows the data of the active estimate. To float the window, drag it over the estimate or double-click the title bar of the window when it is docked.
 - When you dock a window to either side of the estimate, you can resize the window and use the arrow keys in the window to move right and left through the columns.
 - You can resize the window while it is floating.
 - When you open the window, it appears the same as it was when you last used it, including whether you had the toolbar showing or not.
- You can "dock" the window to the left, right, top, or bottom of the main window by moving it over one of the corresponding arrows at the edge of the main window—or in the bulls eye at the center—and releasing.

Figure 20: The Window Docking "Bulls Eye"





Chapter 6—Printing Estimate Reports

You can print an estimate report on paper, preview it on your screen, or export it to a PDF file, an Excel file, or an ASCII text file. The printing procedure is similar no matter which report you choose to print.

You can also set up customized cover pages, headers, footers, and a signature block for each estimate report. Once you have a presentation you like, you can save it to a named layout for printing that report in the future.

To print an estimate report

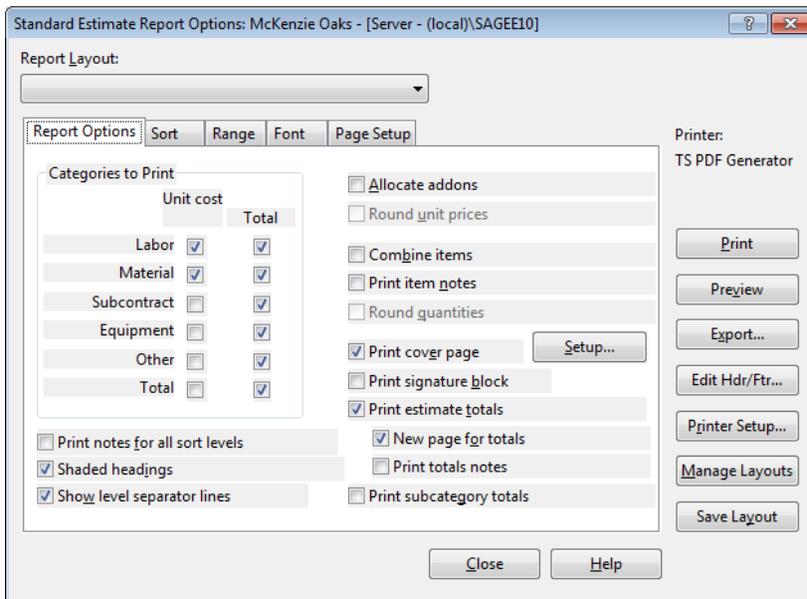
- 1 Open an estimate. (You must have an estimate open because the report information comes from the current estimate.)
- 2 In the Reports group of the Home tab, select the report you want to print.
(In classic view, select your report from the Reports menu).
- 3 In the report window, click [Print], [Preview], or [Export] to print, preview, or export the selected report.
- 4 (Optional) You can customize your reports.

To customize the report, from the report window, click [Report Options] to open the Report Options window.

In the Report Options window, you can select which records print, sort the report information, change the fonts or colors, change the page setup, set up headers and footers, or set up a signature block.

When you save your layout, you can choose whether to save it as Personal (for your exclusive use) or as Shared (making it available to all Estimating users).

Figure 21: The Report Options Window



NOTE: For the Spreadsheet report, you can click [Prefill from Spreadsheet] to change the report options to match the current layout of the spreadsheet. This is an easy way to get a printout that looks the same as the spreadsheet on the screen. If you prefer a different layout for the report, you can change the spreadsheet layout before you print.

- 5 (Optional) To check the appearance of the report before you print it, click [Preview].
- 6 (Optional) To save your changes for the future, click [Save Layout] and give the layout a name. You can select this layout name in the future to use these changes. If you have permissions, you can also share the layout with other Sage Estimating operators.
- 7 Click [Print] to print the report from the Report Options window.

To save a report as a file

- 1 In the report window, click [Export].
- 2 In the Export Report File window, select the drive or directory in which you want to save the report. Then enter a name for the report in the File Name field.
- 3 In the Save as type field, choose a file format. Your choices are:
 - Portable Document Format (*.pdf)
 - Microsoft Excel Workbook (*.xls)
 - Microsoft Excel XML (*.xml)
 - Comma Separated Values (*.csv)
 - Tab Separated Values (*.tsv)

- Text Files (*.txt)

4 Click [Save].

To preview a report

- 1 From the Reports group of the Home tab (or the Reports menu in classic view), select the report you want to preview.
- 2 Click [Preview].
- 3 In the preview window, use the buttons at the top of the window to manipulate the display.

Table 2: Print Preview Buttons

Button	Action
[Print]	Starts printing the report.
[Next Page]	Previews the next page.
[Prev Page]	Previews the previous page.
[One Page]	Shows one page at a time.
[Two Page]	Shows two pages at a time.
[Zoom In]	Makes the pages larger.
[Zoom Out]	Makes the pages smaller.
[Close]	Returns to the previous window.



Chapter 7—Using Address Book

The Address Book is a database of company and personnel contact information. Contacts for Sage Estimating include the subcontractors, clients, engineers, and architects you work with, as well as your own company information.

The Address Book is available in Sage Estimating wherever you need contact information. For example, when you need to assign a subcontractor or a vendor to an item, you can open the Address Book contact selection list from the estimate and select the subcontractor you want to use.

You can perform the following Address Book functions from Sage Estimating:

- Create or edit a company or person contact.
- Select a company.
- Select the client's company (in the estimate settings).
- Select the architect's company (in the estimate settings).
- Select the engineer's company (in the estimate settings).
- Select the default subcontractor or vendor for a material class (Material Class window).

Sage Estimating allows for creation of only one Address Book database. If you have multiple existing Address Book databases, combine all your contacts into one database and then migrate your Address Book data using the Estimating Management Console. See the *Installation and Administration Guide* for data migration instructions.

If you do not have existing Address Book data, create a new Address Book database as outlined in the following section.

Creating an Address Book Database

The Sage Estimating installer creates a new Address Book database for you when you install Sage Estimating. Sage Estimating allows you to use only one Address Book database at a time. However, you can migrate existing Address Book databases and select any of them to be the active Address Book database.

You must have at least one active Address Book database. If you inadvertently delete your only Address Book database, the Configuration wizard detects and creates a new one the next time you start Sage Estimating or the Estimating Management Console.

Editing a Contact List

You can edit any of the contact lists in an Address Book database, including Companies, People, Regions, or Trades. You can either add a new contact or delete or edit an existing one.

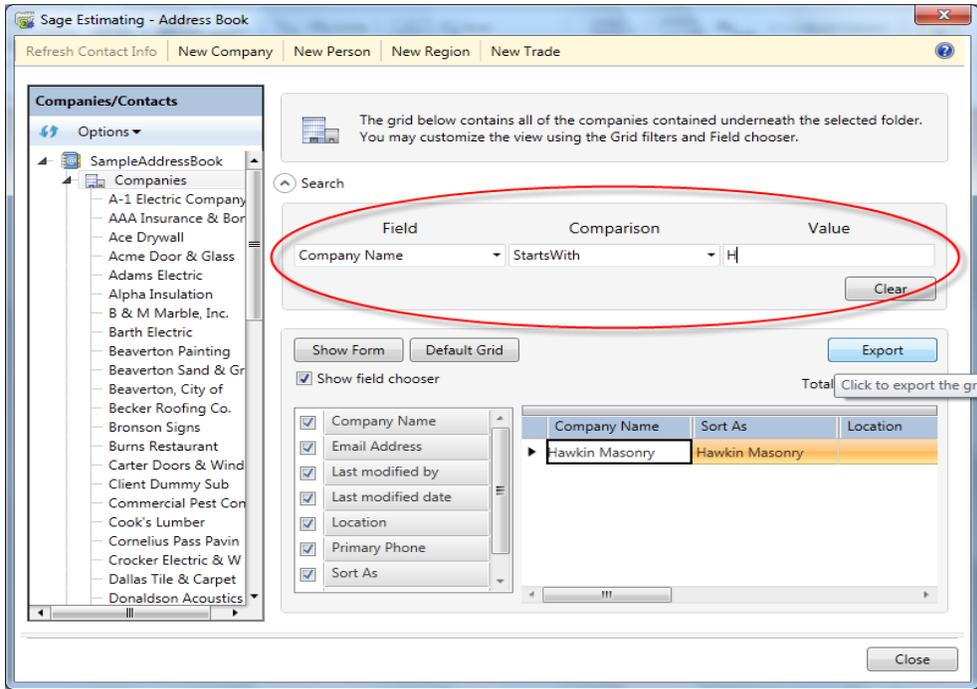
To edit contacts in an Address Book database

- 1 From Sage Estimating, click on the File menu button  and then select Address Book (in classic view, select File menu > Address Book).
- 2 Click on the Address Book database in the Companies/Contacts pane to expand the list of contact types.
- 3 Select the contact type (Companies, People, Regions, or Trades) that you want to edit from the Companies/Contacts pane.
- 4 Locate and select the contact you want to edit from the list in the Companies/Contacts pane.

If desired, you can select a contact type (Companies, People, Regions, or Trades) from the list in the Companies/Contacts pane and use the search options in the right-hand pane to locate a specific company or contact.

For example, click Companies in the Companies/Contacts pane and select Field=Company Name, Comparison=StartsWith, and Value="H" to see a list of all company names in the selected Address Book database that begin with the letter H.

Figure 22: Searching for Address Book Contacts



- 5 Edit the contact information as desired.
- 6 Click [Save] to save your changes.

To add contacts to an Address Book database

- 1 From Sage Estimating, click on the File menu button  and then select Address Book (in classic view, select File menu > Address Book).
- 2 Click on the Address Book database in the Companies/Contacts pane to expand the list of contact types.
- 3 At the top of the Address Book window, click [New Company], [New Person], [New Region], or [New Trade] to create the new contact.
- 4 Type the contact information in the right-hand pane.
- 5 Click [Save] to save the new contact information.



Chapter 8—Advanced Features

Sage Estimating offers several advanced features. For example:

- WBS (work breakdown structure) codes
- Crews
- Customizable Spreadsheet Sequences
- Subcontractor Bid Grids
- Adjust Spreadsheet Columns
- Move/Copy Items

Using WBS Codes

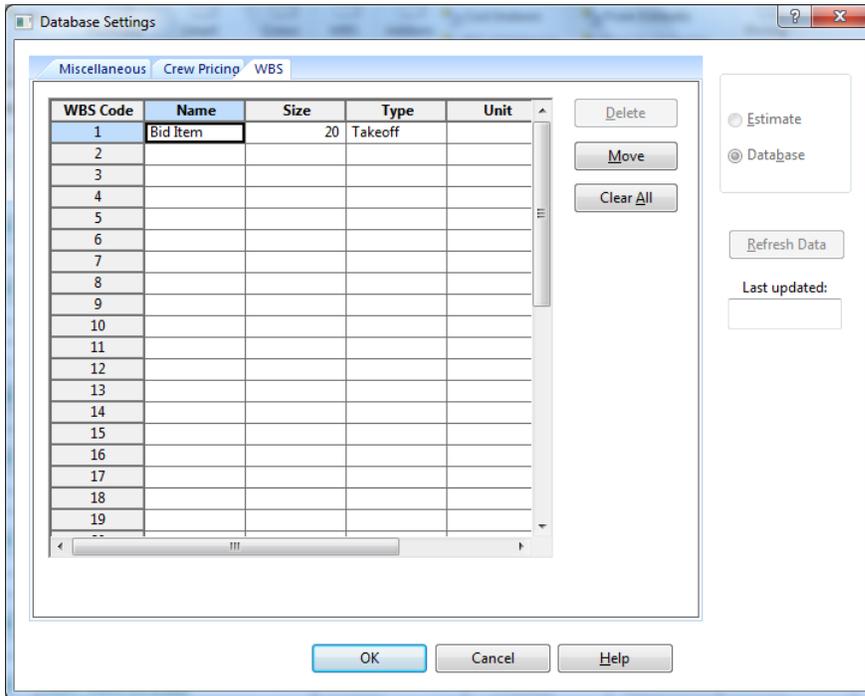
Sage Estimating lets you define as many as forty work breakdown structure (WBS) codes to provide custom spreadsheet and report sequences. WBS codes let you sort estimate items based on a scheme of your own. For example, you might want to list items by estimator, department, or bid item.

Within each WBS, you create numerous WBS values and assign them to items. After you set up a WBS code and its values, you can assign it to items at takeoff or enter it in the WBS column for items already in the spreadsheet. For example, you can set up a WBS code called Bid Item and create multiple values for the code, such as door or window installation. During item or assembly takeoff, Bid Item appears in the takeoff grid and the values appear in a drop-down list from which you can choose the one you need.

To set up WBS codes:

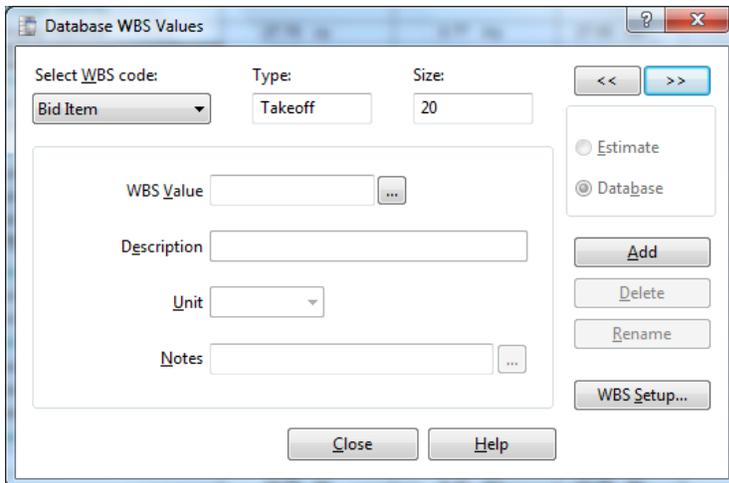
- 1 Click [WBS Code] from the WBS group of the Database tab.
(In classic view, select Database menu > Database Settings.)
- 2 In the WBS tab of the Database Settings window (or the Database Settings window if you are using the classic view), enter the information for each type of WBS code you want to create.

Figure 23: Setting Up WBS Codes



- 3 In the grid, right-click on a cell and select Edit WBS Values from the menu.
- 4 Complete the fields in the Adding WBS Value window. You can use [Copy] and [Prefill] for this purpose. At a minimum, you need to complete the Select WBS code and WBS Value fields to enter a new WBS value.

Figure 24: The Database WBS Values Window



- 5 Click [OK].

Including the Cost of Crews

Crews provide a convenient way to group multiple resources required to construct a standard item so that you do not have to add the resources to estimates one at a time.

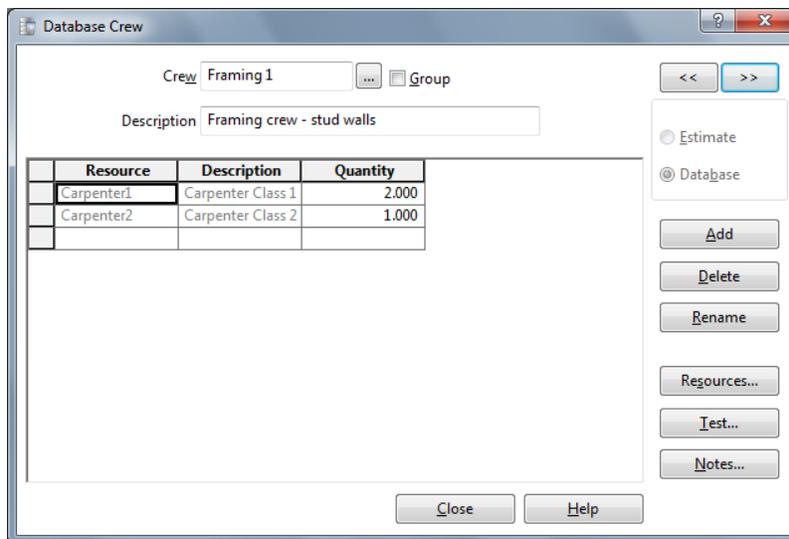
When defining crews for a Sage Estimating database, you include the cost of labor and equipment in item prices. Rate tables provide the hourly rates and benefits for each resource used by your crews. You can set up special rate tables to handle local labor rates or overtime pay scales.

For example, a framing crew might consist of two labor resources—a lead carpenter and an apprentice carpenter—each with different hourly wages and benefits stored in a rate table. You assign this crew to your 2x6 stud items and Sage Estimating then includes the cost of that crew when calculating the item price. In the spreadsheet, 2x6 stud items display item prices that include crew costs. Depending on your database settings, the included crew costs are based on the average cost for each person in the crew or on the total cost of the crew.

To set up resources and crews:

- 1 From the Crews group of the Database tab, select Crews to open the Database Crew window.
(In classic view, select Database menu > Crews > Crews to open the Database Crew window.)
- 2 Click [Add] to create a new crew.
- 3 Enter a name and description for the crew.

Figure 25: The Database Crew Window



- 4 To add existing resources to the crew, click [Resources] and select the labor and equipment resources that you want to add.
- 5 To add new resources, right-click in the crew resource grid and select Create Resource.
- 6 Click [OK].

Crews and Items

You can set up items with a default crew that comes into the estimate at takeoff, or you can specify crews as you build an estimate. Any changes you make to a crew in the spreadsheet become part of that estimate but have no effect on the standard database.

To assign crews to items in the estimate:

- 1 Click [Layout] in the Spreadsheet group of the Home tab (or, if you are using classic view, select Spreadsheet Layout from the View menu).
- 2 In the Spreadsheet Layouts window, select the current layout and then click [Edit].
- 3 In the Visible column, select the Crew check box.
- 4 Click [OK] twice.



NOTE: To assign the crew to multiple items, use the Fill Down feature.

Rate Tables

Sage Estimating lets you specify the rate tables at the standard database, estimate, and item levels. Although most items in an estimate typically use the same labor and equipment rate tables, you can apply a different table to individual items. You can also make changes to an existing rate table in the standard database and then recalculate crew costs in an estimate.

To specify a default rate table for this estimate:

- 1 Click [Info] in the Estimate group of the Home tab (or, if you are using classic view, select Estimate Information from the Takeoff menu).
- 2 On the Main tab, enter the rate tables information.

Figure 26: Main Tab of the Estimate Information Window

The screenshot shows the 'Estimate Information: McKenzie Oaks' window with the 'Main' tab selected. The window contains the following fields and controls:

- Project name:** McKenzie Oaks
- Street:** 12553 Fairway
- City:** Beaverton
- State/Province:** OR
- ZIP/Postal code:** 97006
- Country/Region:** (empty)
- Notes:** (empty text box with a search icon)
- Bid date:** (calendar icon)
- Bid time:** (up/down arrow icons)
- Estimator:** Pat Smith
- Labor rate table:** Polk/Marion L 200 (with search icon)
- Equipment rate table:** Polk/Marion E 200 (with search icon)
- Job size:** (empty)
- Job units:** (dropdown menu)
- Duration:** (empty)
- Duration units:** (dropdown menu)
- City cost index:** (empty with search icon)

At the bottom of the window are 'Close' and 'Help' buttons.

Spreadsheet Sequences

Sage Estimating lets you organize items in the spreadsheet to suit your specific needs. You can define four additional spreadsheet sequences with as many as ten sort levels each.

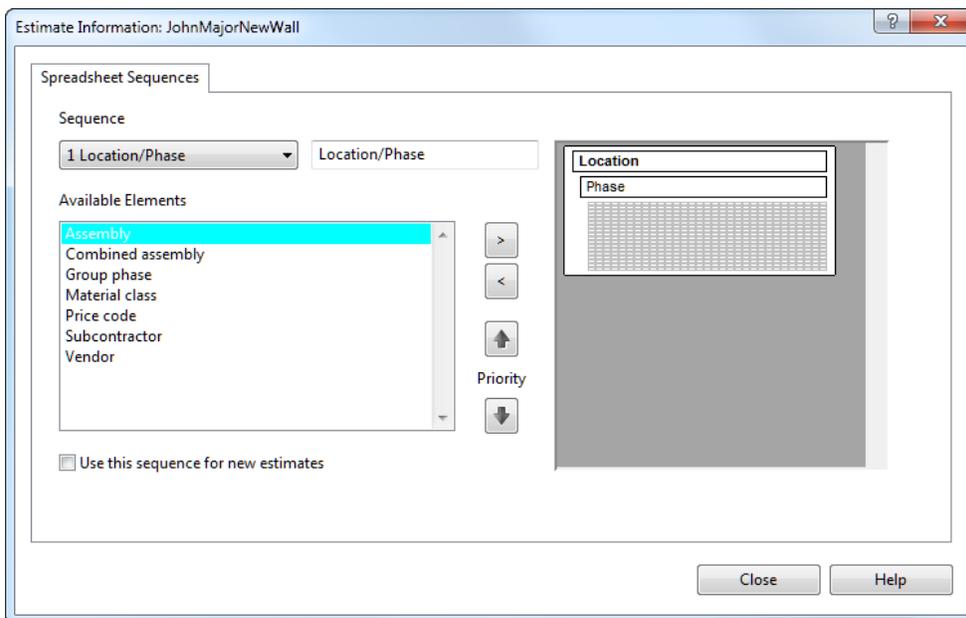
After you define them, the sequences appear as tabs at the bottom of the spreadsheet. You can also display the descriptions of the sort levels in the Spreadsheet Level column. Sort levels also appear when you print reports, move or copy items, and use the Find/Goto command.

As you work, you can change the sequences and sort levels at any time. You can use your favorite sequence as the default for all new estimates that you create.

To define a spreadsheet sequence and specify the sort levels:

- 1 Click [Sort Sequences] in the Spreadsheet group of the Home tab, or double-click the tab for an existing sequence. (If you are using classic view, select Estimate Information from the Takeoff menu).
- 2 Click on the Spreadsheet Sequences tab.

Figure 27: Spreadsheet Sequences Tab of the Estimate Information Window



- 3 Select a sequence number from the list in the Sequence box and select a sequence element from the Available Elements list.
- 4 Type a brief description of the sequence in the box to the right of the Sequence box (optional).

NOTE: If you leave the description box blank, Sage Estimating creates a description based on the sort levels you select. For example, if you select the Assembly, Subcontractor, and Vendor sort levels, the Sage Estimating creates a description of Assembly/Subcontractor/Vendor.
- 5 Use the buttons in the Available Elements area to add and remove the selected sort levels and to move sort levels up and down.
- 6 Click [OK] when you finish defining sequences.

NOTE: Use the Minimized Overlines option on the View tab (View menu in classic view) to see all sequence levels in a single column.

Subcontractor Bids

You can enter bids submitted by various subcontractors for a group of items. After you compare the bids, you can specify the bid that you want to use for the estimate.

To enter subcontractor bids

- 1 In the Sub Amount column, select the items in the estimate covered by the bid.
- 2 Right-click and select Open Bid Grid.

Figure 28: The Bid Grid



- 3 Use the default name for the bid grid, or enter a more descriptive name of your own.
- 4 For each bid, enter the subcontractor's name and bid amount. Optionally, you can enter the bid quantity and unit cost to have the bid amount calculated.
- 5 Right-click on the Sub Name cell and select List Subcontractors for a list of available subcontractors.

To select a subcontractor bid

- 1 After you enter information in the bid grid for each subcontractor and compare the amounts, you can select the subcontractor that you want to use for the job.
- 2 Right-click the name of the subcontractor whose bid you want to use for the estimate and select Use Subcontractor.
- 3 If the included items have labor, material, other, or equipment amounts in the spreadsheet, you have the option of removing or keeping the original category amounts.
 - **Clear the labor, material, equipment, and other amounts.** This changes these category amounts to zero.
 - **Keep the existing labor, material, equipment, and other amounts.** This changes only the Sub amount; amounts in other categories remain unchanged.
- 4 Click [Close].

The selected subcontractor appears in the estimate in the Sub Name cell for all items included in the bid.

Adjusting Figures in Spreadsheet Columns

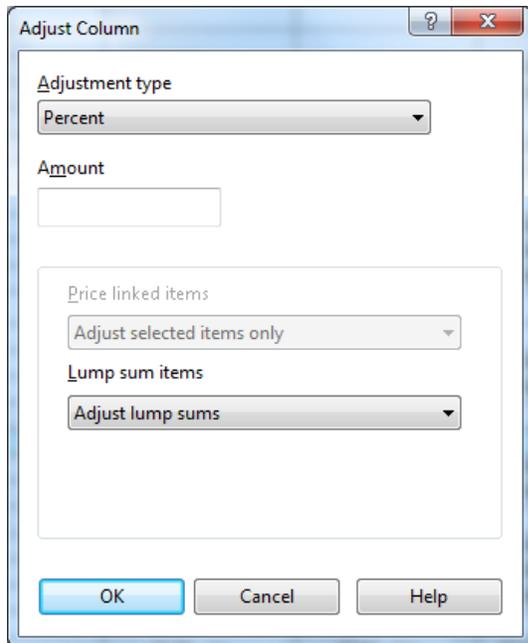
You can adjust columns to modify quantities, amounts, and prices for selected cells within a spreadsheet column. For example, if certain portions of a project are duplicated, you can avoid taking the items off a second time by simply adjusting selected takeoff quantities.

You have several ways to adjust selected values: increase or decrease by a percentage, multiply or divide by an amount, replace the current amount with another, add an amount, or spread an amount to each selected cell based on its percentage of the original total. Because you decide when to make the adjustment final, you can safely try various methods until you get the result you want.

To adjust a spreadsheet column

- 1 In the estimate, select the cells that you want to adjust. You can change cells in any one of the following spreadsheet columns: Takeoff Quantity, Productivity (labor and equipment categories only), Price (all categories), Amount (all categories), and Totals.
- 2 Right-click and select Adjust Column.

Figure 29: The Adjust Column Window



- 3 Choose an adjustment type and specify the amount to use to recalculate the selected cells. The following adjustment types are available:
 - ▣ Percent
 - ▣ Multiply
 - ▣ Divide
 - ▣ Replace
 - ▣ Add
 - ▣ Spread (available from the Amount, Price, Total Amount, and Total Cost/Unit columns only)
- 4 Click [OK].

Sage Estimating applies the adjustment, which is pending, to the selected cells. If necessary, you can use the Undo and Redo features to reverse or reapply adjustments you make to the spreadsheet.



NOTE: You can also adjust all the items by typing an amount at the overline level, which proportionately spreads the amount to the items beneath the overline.

To finalize an adjustment

- 1 In the estimate, select the adjustments that you want to finalize. Pending adjustments are marked by a red triangle.
- 2 Right-click and select Adjust Column.
- 3 Select Finalize Adjustment as the Adjustment Type and click [OK].

After you have finalized productivity adjustments, Sage Estimating removes the red triangle from the selected cells. The spreadsheet adjustments are now permanent and cannot be undone.

Move/Copy Items

You can move or copy items to another spreadsheet level in the estimate when the spreadsheet items are not combined and the current spreadsheet sequence includes one of these levels:

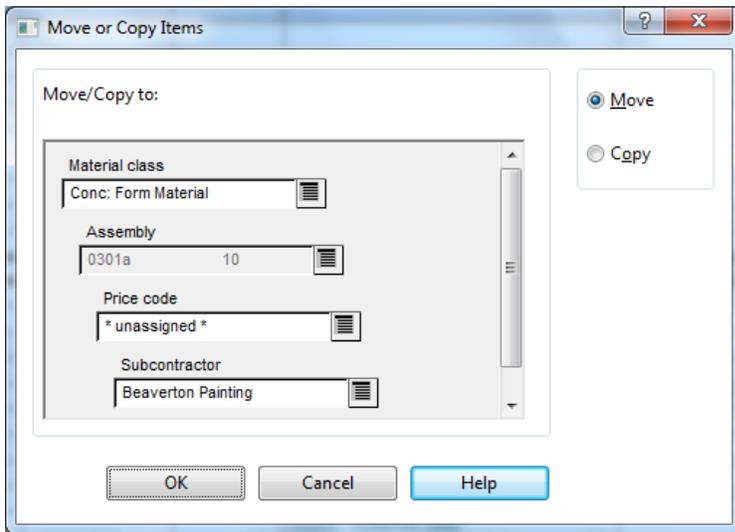
- Work Breakdown Structure (WBS)
- Location
- Subcontractor
- Material Class
- Job Cost Phase
- Unassigned—Items that appear under the Unassigned level do not correspond to the current spreadsheet sequence levels. For example, if the current spreadsheet sequence is Location, items under the Unassigned level do not have a location code assigned to them.

Move/Copy is not available for the first three spreadsheet sort tabs: Phase/Item, Takeoff Order, or Assembly.

Move or copy items, as follows:

- 1 In the estimate spreadsheet, right-click on the row header and select Move/Copy or click [Move/Copy] in the Spreadsheet group of the Home tab.
(If you are using classic view, you can also click [Move/Copy] on the spreadsheet toolbar.)
- 2 The field labels in the window correspond to the current spreadsheet sort sequence. Select the appropriate primary and/or secondary level.

Figure 30: The Move or Copy Items Window



- 3 Click Move or Copy, as appropriate.
- 4 Click [OK].



Appendix—Keyboard Shortcuts

Sage Estimating offers many keyboard shortcuts that you can use to access commands. The shortcuts available depend on your cursor placement; some shortcuts are specific to certain windows or spreadsheet columns.

General Shortcuts in Sage Estimating

Table 3: General Keyboard Shortcuts

Shortcut	Result
F1	Displays Help for a field or button.
SHIFT+F1	Displays help for toolbars and screen areas.
F2	Lets you edit the contents of a cell or field.
F4	Opens the Totals window.
CTRL + F4	Closes the active window.
ALT + F4	Closes all Sage Estimating windows.
F7	Scans for the next incomplete cell.
F10	Opens a list.
SHIFT + F10	Opens the shortcut menu.
ALT + F	Displays a drop-down list.
ESC	Ends the field edit without saving your entry.
<u>Underlined letter</u>	Executes a menu command or button when you type ALT and then the letter.

Shortcuts for the Spreadsheet

Table 4: Spreadsheet Keyboard Shortcuts

Shortcut	Result
CTRL + 1	Opens the One-time Item window.
CTRL + D	Opens the Detailwindow.
CTRL + E	Goes to the first visible equipment column.
CTRL + I	Lets you edit the selected item in the database.
CTRL + L	Goes to the first visible labor column.
CTRL + M	Goes to the first visible material column.
CTRL + N	Opens the Notes window.
CTRL + O	Goes to the first visible other column.
CTRL + P	Lets you edit the selected phase in the database.
CTRL + Q	Goes to the Takeoff Quantity column.
CTRL + S	Goes to the first visible subcontractor column.
CTRL + T	Goes to the first visible total column.
F2	Lets you edit a cell.
F3	Finds the next item that matches the current search criteria.
F4	Opens the Totals window.
F11	Opens the Calculator window.
ESC	Cancel your changes to a cell.
CTRL + PAGE DOWN	Goes to the next spreadsheet sequence tab.
CTRL + PAGE UP	Goes to the previous spreadsheet sequence tab.



Index

A

- Adding WBS Value window 35
- addon costs
 - viewing 24
- addons
 - adding to totals 26
- Address Book
 - adding and editing contacts 32
 - purpose 31
 - selecting a database 32
- Adjust Column window 41
- adjustment types 41
- assemblies, reviewing 16
- assemblies, using formulas 16
- assembly takeoff 15
- Assembly Takeoff window 15

B

- Bid Grid 39

C

- classic view 6
- contacting Sage 5
- creating new estimates 11
- crews, purpose 36

- Customer Support, contacting 4

D

- database
 - Address Book database 10
 - estimate database 7
 - standard database 9
 - types 7
- Database Crew window 36
- Database Settings window 34
- Detail window 24
- docking windows 27

E

- estimate
 - adding addons 26
 - adding subcontractor bids 39
 - assigning crews 37
 - creating 11
 - prices & quantities 23
 - scanning 23
 - spreadsheet operation 19
 - viewing totals 24
- Estimate Information window 37-38

F

- formulas
 - using with assemblies 16

H

- help
 - Customer Support, contacting 4
 - using the in-product Help 1

I

- icons 20
- item takeoff 14
- Item Takeoff window 14

M

- menu layout 6
- Modify Spreadsheet Layout 23

O

- one-time items
 - creating 17
 - definition 17
 - performing takeoff 17
 - saving to database 18
- One-Time Takeoff window 17

P

- previewing reports 30
- printing reports 28

Q

- quick takeoff 13
- Quick Takeoff window 13

R

- rate tables
 - purpose 37
- Report Options window 28
- reports
 - output file types 29
 - previewing 30
 - printing 28
 - saving to file 29
 - selecting options 28
- reviewing assemblies 16
- ribbon layout 6

S

- Sage contact information 5
- sequences, spreadsheet
 - purpose 38
- spreadsheet
 - adding addons 26
 - adjusting columns 40
 - column adjustment types 41
 - command icons 20
 - customizing 21
 - layout 22
 - operation 19
 - ribbon 20
 - scanning 23
 - sequences 38
 - viewing totals 24

Spreadsheet Layouts window	22, 37	.....
subcontractor bids, entering	39	.....
subtotals, adding	27	.....

T

takeoff		
assembly takeoff	15	.....
item takeoff	14	.....
one-time item takeoff	17	.....
quick takeoff	13	.....
types	13	.....
Totals window		
docking	27	.....
viewing	24	.....

W

WBS codes		
purpose	34	.....
setup	34	.....