Sage Estimating (SQL) v25.1

Release Notes

August 2025

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Contents

Version 25.1 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 25.1 software. Read these release notes carefully before installing Sage Estimating 25.1.

Installation Notes

System Requirements

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article System Requirements for Estimating v25.1.

> **Note:** The system requirements are the minimum for a computer running Estimating with one SQL Server instance. Running several other business programs with multiple SQL Server instances may affect the performance of your system.

Migrating from Estimating (Pervasive) to Versions after v20.1

The migration path from Estimating (Pervasive) to this release is not direct. If you have been using a Pervasive-based version of Sage Estimating, you need to:

1. Migrate (transfer) your existing Pervasive-based data to Estimating (SQL) v20.1.

   > **Important!** Sage recommends that you first migrate your data to a test environment to ensure that the migration proceeds smoothly. For example, if there are errors in your Pervasive-based data, you have an opportunity to correct them in that version before migrating the data to a live environment.

2. Upgrade your database from v20.1 to this release.

For information about migrating your Pervasive-based data to Estimating (SQL), see the version 20.1 *Installation and Administration Guide*.

> **Tip:** You can continue to operate v20.1 alongside this current release. If you have a large number of estimates in Estimating (Pervasive, you can migrate them to version 20.1, export them from version 20.1, and then import them later into this version, as needed.

Installing Sage Estimating

Refer to the *Installation and Administration Guide* for complete instructions on installing the software and migrating or upgrading your data.

Before Installing

Important!

- Microsoft .NET 4.8 is required for Estimating. If it is not already installed on your computer, the Estimating installation will require a restart. If you prefer not to restart when installing Estimating, first install .NET 4.8 from the Prerequisites folder (in the Install folder), and then restart your computer before installing Estimating.

  If you receive a message about .NET during installation, stop the installation, restart your computer, and then run the installation program again.

- Sage Estimating (SQL) version 25.1 is compatible with version 21.1 of Sage 300 Construction and Real Estate, and later. If you integrate Estimating with Sage 300 Construction and Real Estate for Job Cost or Project Management, do not install Sage Estimating (SQL) version 25.1 until you install Sage 300 Construction and Real Estate version 21.1, or later.
- If you are using third-party software that integrates with Sage Estimating, check with the third-party software vendor to ensure that their software is compatible with version 25.1 before you upgrade to this version.

Installing training data from the Configuration Wizard

In the **Configuration Wizard**, if you use the **Create an Estimates Database** window to create an estimate database, you can select a new **Install training data** check box, which installs several training companies.

This option is available only if you create a SQL Server instance separately from the Estimating installation. If you use the option to install SQL Server Express during installation, the option to install training data is not available.

Note: If no address book exists when you install training data, Estimating creates 2 address book databases: an address book for training data and an empty one to use when you finish using the training data. If an address book exists, Estimating does not create an empty one.

We've been listening to you!

Sage thanks you for your product ideas!

In Sage Estimating (SQL) version 25.1, we have incorporated the following customer requests:

- **New spreadsheet filters.** You can define powerful new spreadsheet filters to find and analyze data in your estimates.

  For more information about this new feature, see Powerful new filters for the estimate spreadsheet.

  Thank you for your suggestions, Jon H, Keith A., and Paul Asnicar.

- **Customized layouts for estimates grids.** You can create and save customized layouts for the estimates grids in the Manage Estimates window and the Estimating Management Console.

  For more information about this new feature, see New estimate grid layouts.

  Thank you for your suggestions, Mike O and Greg.

New Features and Enhancements

Sage Estimating version 25.1 includes the following significant new features and enhancements:

- **New spreadsheet filters.** You can define powerful new spreadsheet filters to find and analyze data in your estimates.

  For more information about this new feature, see Powerful new filters for the estimate spreadsheet.

- **Customized layouts for estimates grids.** You can create and save customized layouts for the estimates grids in the Manage Estimates window and the Estimating Management Console.

  For more information about this new feature, see New estimate grid layouts.

- **Improved Integration with eTakeoff Dimension:**

  Version 25.1 provides smoother, easier integration with eTakeoff Dimension. You no longer need to map items in Estimating to items on plans through eTakeoff Bridge before you can take off items using Dimension. Now, you can retrieve item quantities directly from traces in eTakeoff Dimension while working on an estimate in Sage Estimating. You can select the primary measurement for the trace or you can select a different measurement, and then return the quantity for that measurement to Estimating.

  > **Note:** You need to have **eTakeoff Bridge 4.25.7.146** and **eTakeoff Dimension 8.2-8** for this enhanced integration.

  For more information, see Seamless integration with eTakeoff Dimension.

- The estimates grids in the **Manage Estimates** window and the **Estimating Management Console** provide greater flexibility in generating data for and viewing data from external report databases.

  For more information, see More flexibility in generating data for and viewing data from external report databases.

- In the **Manage Estimates** window, you can now filter estimates in the estimates grid by their Lock State (checked-out status).

- There are new options for reports in the **Estimating Management Console**

  - On the **External Report** and **Report Manager** tabs, you can select a new **Generate only Project Information, Branch, and Totals** option to limit the information written to report databases to estimate header information. Reducing the size of these databases reduces the time to generate report data and to delete previously generated data. Selecting this option also makes available the **Generate data on estimate close and save** option.

  - On the **External Report** > **Options** tab, you can select a new **Generate data on estimate close and save** option. Selecting this option helps to keep your external report totals more up to date without having to set up a separate process to generate data.
  - Also, on the **External Report** > **User Access** tab, there is a new **Automatically include new users in this configuration** option. You can select this option if you want to provide new non-administrative users access to the selected external report database configuration automatically. .
  - When you set up a new Estimates database, Estimating automatically creates an external reports database (EstimateGridTotalsSource) that you can use to display totals in the estimates grid.

- **Spreadsheet enhancements:**
  - In the **Layouts** area of the ribbon, there is a new Create New Layout  button that you can use to open the **Add Spreadsheet Layout** window, rather than having to first open the Layouts window. (Note that we have renamed the Edit Spreadsheet Layout window to **Add Spreadsheet Layout**.)
  - When you select a branch in the estimate catalog, the estimate grid shows all the estimates in that branch and its sub-branches.
- **Models enhancements:**
  - Fields that are not used (such as undefined WBS codes) are no longer written to models, improving the performance of models.
  - In the **Model Interview** window, the **Model Name** and **Model Description** are now separate fields. You can edit the Model Description.

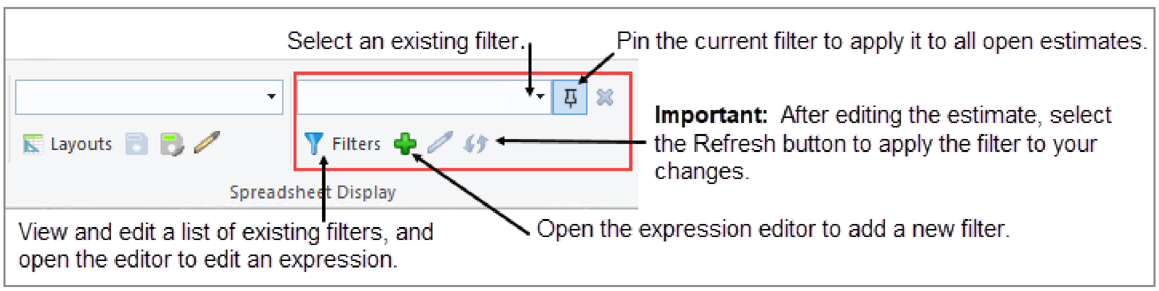
    Also, you can edit a model description on a spreadsheet overline. After pressing the **F2** key, type a new description, and then move out of the Description field. Note that you can edit the description only at the first level of the spreadsheet sort.
- **Other improvements:**
  - In the **Address Book** in the Estimating Management Console, the **Name** column is sized automatically to accommodate the company names.
  - We have retired **Classic View**. Rather than maintaining outdated technology, Sage has chosen to focus on delivering improvements, such as the new spreadsheet filters, that will boost your ROI. The ribbon's advanced capabilities afford more opportunities to provide a richer experience with features that you have been requesting.
  - The **PEP** (Product Enhancement Program) option no longer exists.
  - The **OLE DB driver** is no longer installed with Estimating. It has been replaced with .NET. This modernization of Estimating code libraries enables Sage to keep up with technology and provide the features you want.

- When installing Sage Estimating, you can select a new option to install the **Estimating training data**.
- **SQL Express 2022** is now installed if you choose to install SQL Express during the Estimating installation.
- To avoid confusion, Estimating no longer displays **warnings about a grace period** until *after* your subscription expires.

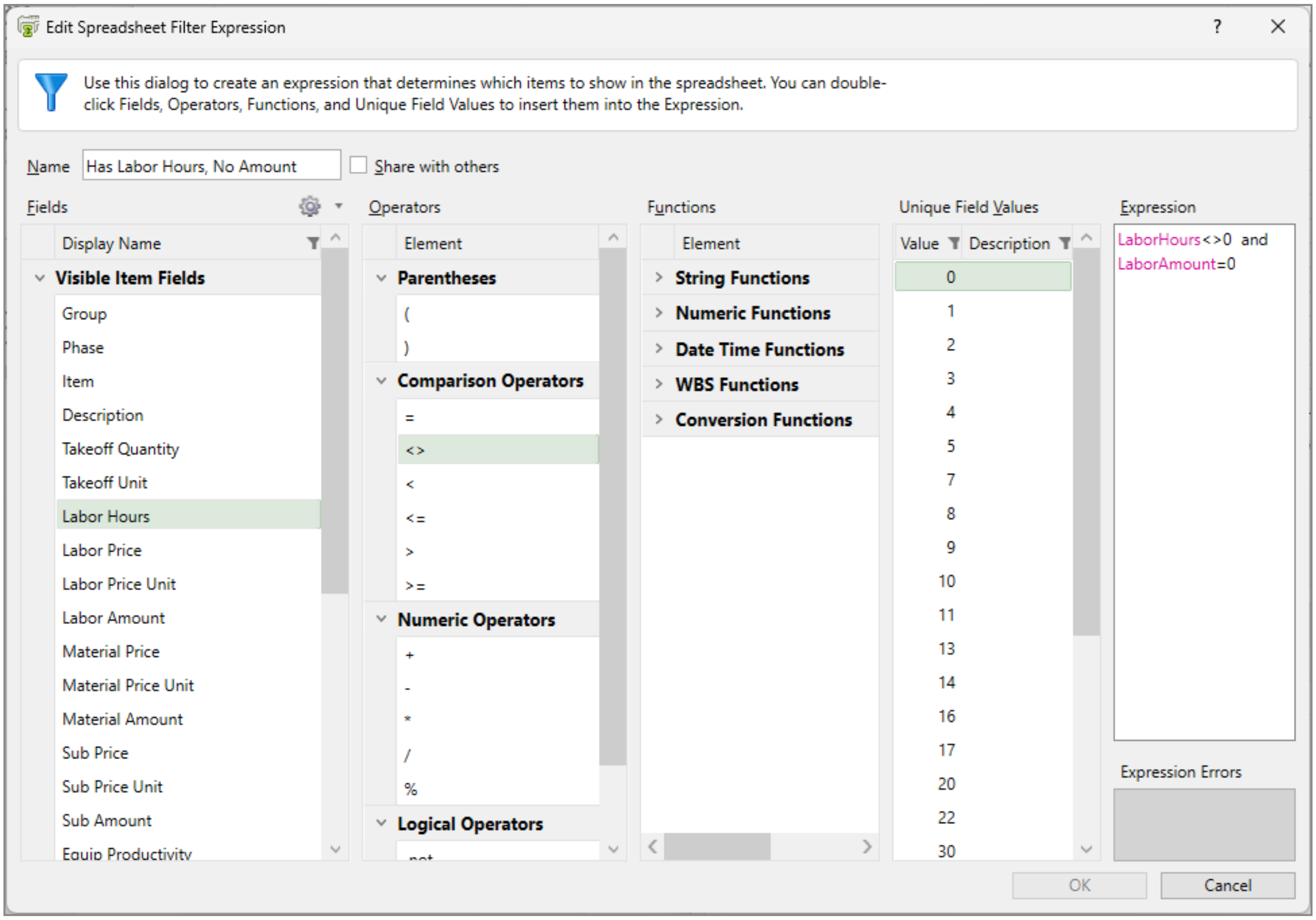
Powerful new filters for the Estimate spreadsheet

You can now create filters to limit the display of items on the spreadsheet to items that match specified criteria. Filtering items for an estimate enables you to more easily find and analyze estimate data. You can create as many filters as you need.

You use new buttons in the **Spreadsheet Display** section of the ribbon to add and edit filters; to select and apply a filter to the current spreadsheet sequence; and (optionally) to apply the filter automatically when you view other sequences in the same estimate and to other estimates. You can also use different filters for different sequences in your estimate.



The power of the filters derives from your ability to construct expressions using the item and estimate fields, operators, functions and field values exposed in the new **Edit Spreadsheet Filter Expression** window, shown here:



Note: You cannot both apply a filter and combine items on the same estimate spreadsheet.

You can choose to share filters you create with others or keep them for your sole use.

For more information about creating, editing, and applying spreadsheet filters, see the Estimating help.

Apply the new spreadsheet filters to Estimating Spreadsheet Reports

You can also use a new **Filter report** option in the **Spreadsheet Report Options** dialog to select and apply a spreadsheet filter to a spreadsheet report. If you choose to include a cover page with the report, the cover page notes the name and details of the filter.

If you also select the **Prefill from Spreadsheet** option, the report uses the filter currently applied to the spreadsheet.

Note: You cannot apply a filter and combine items on the same report.

New estimate grid layouts

You can add custom layouts for estimate grids in the Manage Estimates window and the Estimating Management Console. Similar to the Edit Spreadsheet Layouts window in Estimating, you can add and hide columns on the estimates grid, saving the layout for future use. You can also rearrange the column order by dragging and dropping them to a new position. Optionally, you can mark the layout as Shared so that it is available to other Estimating users.

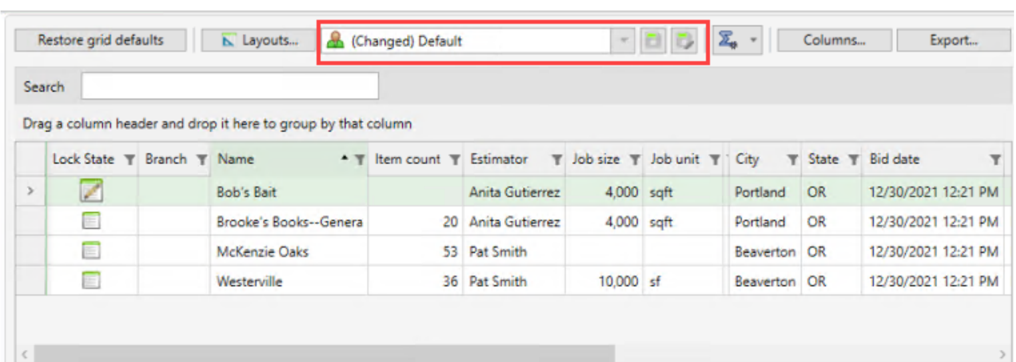
To save a new layout for the estimates grid:

1. On the Estimates tab in the Estimating Management Console or in the Manage Estimates window in the Estimating program, click [**Columns**] to open the **Show/Hide Columns** window.

2. Select the checkboxes for the columns you want to view when using your new layout and clear the checkboxes for the columns you want to hide.

3. Click [**OK**] to return to the main window.

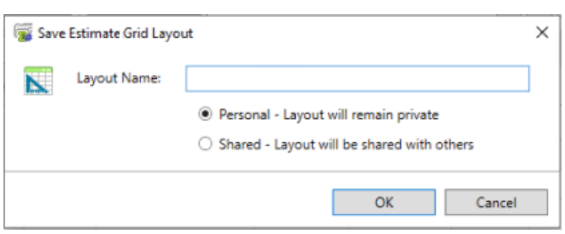
   The program indicates that the current layout has changed, as shown in this image.

   In the layout list box, the name of the current layout is prefixed with "(Changed)" and save buttons are now available beside the box. You use the first Save button to save your changes to the existing layout. You use the second button to save the layout with a new name.

4. Click the second button ("Save the layout as") to the right of the layouts list box.

   The Save Estimate Grid Layout window opens, as follows:

5. In the Save Estimate Grid Layout window, in the Layout Name box, type a name for the new layout.
6. If you want to share this new layout with other users, select the **Shared** option.
7. Click [**OK**] to save the layout.

> **Tip:** To apply a defined layout to the estimate grid, you select it from the layouts list box above the estimate grid.

For more information about using estimate grid layouts, see the Estimating help.

Seamless integration with eTakeoff Dimension

With version 25.1, tighter integration with eTakeoff Dimension removes the cumbersome manual work of mapping Estimating items to items in eTakeoff. Now, when you're working on an estimate in Sage Estimating, you can quickly link a quantity cell in an estimate to a measurement in an eTakoff plan and send quantities for that measurement to the estimate with a few short keystrokes.

You can take off new, one-time items and connect them to Dimension without having to first map the items in eTakeoff Bridge. For even greater efficiency, by starting with an estimate template, you can easily update quantities for your new estimate by retrieving them from the corresponding plans in Dimension.

> **Notes:**
>
> - While you need to have both **eTakeoff Bridge 4.25.7.146** and **eTakeoff Dimension 8.2-8** installed on the same computer where Sage Estimating is installed, you do not need to have Bridge open when performing a takeoff.
> - For information about how to use eTakeoff Dimension, see the help for that application.

To link an item in Estimating to a trace in eTakeoff and retrieve quantities for a selected measurement:

1. On the Estimating spreadsheet, right-click the **Takeoff Quantity** cell for the item you want to take off.

   > **Tip:** Make sure you select the item, and not an overline.

2. From the shortcut menu, select one of the following options:

   - **Get Quantity from Dimension.** You select this option if you want to use the primary quantity for a measurement.

- **Get Quantity from Dimension and Select Variable.** You select this option if you want to select a quantity other than the primary quantity from the Quantity List (the list of variables for the selected measurement).

  Selecting either of these options opens eTakeoff Dimension.

3. In eTakeoff Dimension:
   a. Select the project and the plan corresponding to your estimate.
   b. Select the measurement that has the quantity you want.
   c. If you selected Get Quantity from Dimension in step 2, select **Return to Estimating with Quantity**.

      If you selected Get Quantity from Dimension and Select Variable:

      i. Right-click the measurement and then select **Return to Estimating with Quantity**.

         The **eTakeoff Measurement Variable List** opens, where you can select a different variable (not the primary quantity) and edit the item name to be returned to Estimating.

      ii. In the grid, select the variable you want to use for the item in Estimating (for example, Perimeter).

         Now, you can either accept the default item name in Estimating, or you can change it.

      iii. To change the item description, from the Item description options list, select one of the following:

         - Select **Append the measurement description** to add the Dimension description to the item description in the estimate.
         - Select **Replace with the measurement description** to replace the existing item description in the estimate with measurement description from Dimension.

      iv. Click [**OK**] or double-click the variable to send the quantity to Estimating.

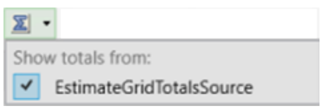
You are returned to the estimate in Sage Estimating with the quantity displayed in the cell you selected. The cell is marked with a green triangle, indicating that the item quantity is now connected to Dimension. If you chose to change the item name, the new name appears in the Description cell.

More flexibility in generating data for and displaying data from external report databases

Specifying the external reports database from which to display estimate totals

We removed the **Estimate Grid Totals Source** option from the External Report tab in the Estimating Management Console. In version 24.1, you specified the external report database to use to populate the totals in the estimate grid by selecting the **Estimate Grid Totals Source** option for the associated configuration.

In version 25.1, you specify the external reports database using a new **Show totals from** button, located on the Estimates tab in the Estimating Management Console. Selecting the button displays a list of the external reports databases from which you can choose the database you want to use.



This button is also available in the Manage Estimates window, enabling users who have no access to the Estimating Management Console to view totals from a specified database. The estimate grid in the Manage Estimates window also provides a **Total Allowed** column that you can use to control whether totals will be generated for a particular estimate and configuration.

Note: You need to have created an external reporting database before you can select it.

Generating estimate totals data

The estimates grids provide visual cues letting you know whether you should refresh estimate totals. The **[Generate Totals]** button is available for each estimate whose report totals are not current.

You can use the button beside each estimate to generate data for that estimate, only, or you can use the button in the column header to generate the data for all the estimates that have stale data.

Fixes Since the Previous Version

Version 25.1 includes the following fixes:

- **Assemblies:**
  - The **Assembly Takeoff** list now immediately reflects newly added assemblies when you return to it from the **Edit Assemblies** window.
  - **Assembly Review** now reliably retains all passes and associated notes, even if you make manual changes during takeoff.
- **Bill of Materials:**
  - Dragging items into a material class properly assigns the associated BOM description.
  - BOM descriptions are now properly cleared from the Material Class list after you remove a mapped item.
  - Selecting or reassigning items in the Material Classes list in the **Bill of Materials** window no longer results in multiple items appearing selected.
  - Double-clicking a database item correctly displays the material classes.
  - Estimating no longer closes when you edit a material class description in the **Bill of Materials** window.
  - Adding a new vendor “on the fly” while creating a material class now works as expected. Estimating prompts you to save the vendor and adds it to the address book.
- **Items:**
  - When you select **Edit Item** in an item table, Estimating now correctly navigates to the selected item in the Database Items list.
  - On the **Database Items** window, the search now filters results consistently as you type, eliminating flickering or toggling behavior.
  - When adding a new item in the **Edit Database Items** window, the selected phase is now correctly inherited, even if it contains no items.
  - Copying items between estimates now works reliably, even when WBS values are formatted differently between estimates.
- **Reprice Crews:**

- **Reprice Crews** now correctly applies changes to rate tables or crew selections after previewing, without needing to reopen the window.

- **Database Editor:**
  - Filtering by phase again returns results.
  - You can again check in and check out a standard database whether or not you are the SQL Server administrator.
  - You can now enter WBS values “on the fly” using a new **Edit WBS Value** dialog, accessible from the shortcut menu or by pressing **Ctrl** + **W**.

- **Estimating Management Console:**
  - When you open an estimate from the Estimates grid, the **Estimate Catalog** is properly refreshed to show the current lock state of the estimate.
  - You are no longer prompted to save changes in the Estimate pane when the estimate information has a contact that is not associated with a company.
  - If you try to create a new estimate while you have unsaved changes in an existing open estimate, the program now prompts you to save your changes before proceeding.
  - When copying a standard database that is currently the default, the new copy is not also marked as the default, ensuring that there is only one default database.
  - If you use the option to add users automatically to an external report database configuration, new users are now added even if they haven’t been assigned a role.
  - In the estimate catalog you no longer receive an error when switching between estimates that have different user-defined fields.

- **Variance Reports:**
  - In variance reports, the Total, Labor, Material, Subcontract, Equipment, and Other Amount columns for **Estimate 1** appear correctly, ensuring accurate side-by-side comparisons.
  - Items from multiple estimates are now matched correctly when they use rate tables.

- **Integration with Sage Intacct**
  - Integration dialogs (Login, Progress, Job Cost Export Wizard, Fix Cost Code, and others) now open in the correct position relative to their parent window.
  - When you open the **Select Cost Code** or **Select Category** window from the spreadsheet, the selected value is now highlighted and visible in the window.

- **Integration with Sage 300 Construction and Real Estate**

- Integration dialogs (Login, Progress, Job Cost Export Wizard, Fix Cost Code, and others) now open in the correct position relative to their parent window.
- When you open the **Select Cost Code** or **Select Category** window from the spreadsheet, the selected value is now highlighted and visible in the window.
- You no longer receive an error message when a large amount of data is passed to or from Sage 300 Construction and Real Estate.
- The **Export to Job Cost window** is now displayed properly on your screen, not partly off-screen.
- When exporting to create a new job, if the job name exceeds 30 characters, it is truncated so that the export succeeds.
- The [**Add Cost Code**] button has been restored in the **Invalid Cost Code** dialog, enabling you to add missing cost codes directly to Job Cost.
- In the **Cost Code** and **Category** selection lists, the [**OK**] button is now available only when you make a selection.

- **Means Integrator:**
  - Means Integrator now handles updates and transfers reliably when you use the **Preview** option before finishing the process.
- **Miscellaneous fixes:**
  - After upgrading, settings for dockable windows from the previous version now persist. (For example, if a window was docked or minimized in the previous version, it remains docked or minimized in the new version.)
  - WBS values are now included properly when you copy items from Estimating into Excel.

Revisions to Version 25.1

This section describes enhancements and fixes we have included in revisions to the software since releasing version 25.1.

Note: Each update is cumulative. That is, each successive update includes all the fixes and enhancements provided in previous updates as well as additional fixes and enhancements in the current update.

Update 1 (Build 25.1.2508.061, August 2025)

Fixes

Update 1 includes the following software fixes:

- In the Estimating Management Console, collapsing groups within the Estimate grid could previously be slow when working with large datasets. This update enhances performance, making the collapsing action faster and more responsive, even with substantial amounts of data.
- Previously, not all external reporting configurations were visible under the Generate Data button in Estimating, even when estimates were properly included. This issue has been resolved.
- The ETakeoff integration feature **Get Quantity From Dimension** no longer displays a canceled request error message when working with longer estimates.

Known Issues

Checking in a Standard Database from the Database Editor Closes the Database for Concurrent Users

You can work on a Standard database in the Estimating Database Editor while other users perform takeoff using the same database in the Sage Estimating program.

When you try to check in the Standard database while other users have the database open, you receive a warning that if you continue to check the file in, there may be unpredictable results for the concurrent users.

If you continue to check the file in despite the warning, the Estimating program stops working for the other users. However, the data is not corrupted and the Estimating program is not damaged.

Need help?

How to Get Help

Get help by:	Recommendation*	To access:
Reviewing in-product help	View information about the current window as well as procedures for using Estimating.	Click the Help button or icon, or press **[F1]** to display the Help topic for that window.
Reading product documentation	View documents and reference material from the Estimating Product Documents website.	Visit the Sage Estimating Product Documents page.
Searching the Knowledgebase	Search the Sage Knowledgebase, which provides 24/7 access to support articles as well as the latest software downloads and updates.	Visit the Knowledgebase at Sage Knowledgebase.
Asking the community	Join industry peers, certified partners, and Sage pros online 24/7 at the Sage Community Hub–the best place to ask questions and share product experiences, tips, and tricks.	Visit the Sage Estimating General Discussion forum.
Checking the latest product alerts	Keep up with the latest product information with Sage Estimating Announcements at the Sage Community Hub forum.	See Sage Estimating Announcements.
Submitting a web ticket	Submit your issue directly to our support team using Online Case submission.	Visit the Sage Customer Portal.
Exploring training options	Learn how to harness the full power of your software through videos and classes at Sage University.	Visit Sage University. You can also get access to Sage University from the Estimating File menu by selecting **Help** > **Sage University**.
*Customer Service hours vary by product line. Access to some resources require an active Sage Business Care support plan.		

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** > **Submit Product Idea**.