



Sage Estimating (SQL) v25.2

Release Notes

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Version 25.2 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 25.2 software. Read these release notes carefully before installing Sage Estimating 25.2.

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 v25.2](#).

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 25.2 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 25.2 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 25.2 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.

New Features and Enhancements

Sage Estimating version 25.2 includes several new features and enhancements.

Integration with Sage Construction Management

With version 25.2, you can export estimates directly from Sage Estimating to a lead in Sage Construction Management. Besides eliminating manual data entry and reducing errors, the integration of these applications offers other advantages:

- Estimators can push detailed cost breakdowns directly into Sage Construction Management, ensuring consistency between preconstruction and project execution phases.
- Because Estimates are transferred with full cost category detail (that is, labor, materials, equipment, and so on), project managers can have a precise budget baseline, improving cost control and forecasting throughout the project lifecycle.

Setting up the integration

There are 2 parts to the integration process:

1. **Setup in Sage Construction Management.** You need to perform some setup steps in Sage Construction Management before you can select integration settings for a standard database or an estimate in Sage 100 Contractor.
2. **Setup in Sage Estimating.** With setup information from Sage Construction Management, you integrate an estimate or a standard database with a Sage Construction Management account.

The next 2 sections provide more information about each of these procedures.

Setting up the integration in Sage Construction Management

Before you start:

- Make sure you have administrator permission in Sage Construction Management.
- Sage Estimating sends estimates to a target lead or project in Sage Construction Management. If the leads to which you will send estimates do not exist in Sage Construction Management, add them. (To find out about setting up leads, see [Add a lead manually](#) in the Sage Construction Management help.)

In Sage Construction Management:

1. Sign into Sage Construction Management as an Admin.
 2. Select the **Settings** icon .
 3. On the **Settings** panel, select **Developer Mode**.
 4. On the **Developer Mode Settings** page, do the following:
 - a. For the **Do you wish to use developer mode** option, select **Yes**.
 - b. Click **[Save]**.
 - c. Refresh the page by selecting **Return to the Application**, and then re-enter the Developer Mode Settings page, where the developer options will now be visible.
 - d. Copy the following numbers and paste them into a text document:
 - Account Key
 - Integration Key/Client Id
 - e. Select **[Add New Apps and Keys]**, and then fill in the **Add Apps and Integration Keys** page, as follows:
 - i. For the **App Name**, enter Sage Estimating.
 - ii. In the **Select Features** section, select:
 - Leads
 - Projects
 - Estimates
 - Job Cost Codes
 - iii. For the Authentication Type, select **Client Credentials**.

Sage Construction Management generates a secret key.
 - iv. Copy the **Secret Key** immediately and paste it into the same text document where you pasted the other keys.
- Important!** Do not select **[Save]** or leave this page before copying and pasting this number. The secret key is only visible once—ensure it is securely stored for all users who will need it. It will not be available again!
- v. Store the text document where you recorded the keys in a secure, accessible location for all estimators, as it will be needed for future sign-ins.

- f. In the **Scopes** section, select **Add**, **Edit**, and **Read**.
- g. For the **State**, type Sage.
- h. Select **[Save]**.

Setting up the integration in Sage Estimating

You can integrate a standard database or an individual estimate with Sage Construction Management.

These instructions describe how to integrate a standard database. To integrate an estimate, you use the Estimate Information window and follow the same steps, except that you can also identify a lead from Sage Construction Management, as indicated.

Before you start

Make sure you have the Account Id, Integration Key, and Client Secret key you copied from Sage Construction Management handy.

To integrate a standard database:

1. In the Estimating Management Console, click the **Standard Databases** tab.
2. From the list in the **Standard Database Catalog** pane, select the standard database you want to integrate with Sage Construction Management.
3. In the **Job Cost Information** section of the detail pane, select **Sage Construction Management** as the job cost interface .
4. Click **[Setup]** to open the **Sage Construction Management Sign in** window.
5. In the **Sign in** window:
 - a. Enter the **Account Id**, **Integration Key**, and **Client Secret** key.
 - b. Select **Save sign-in information**, so that you do not have to keep entering this information when connecting to Sage Construction Management
 - c. Click **[Sign in]**.

The **Job Cost Integrator** window opens.

Note: Sage CM Cost Types are preselected for each **Labor**, **Material**, **Subcontractor**, **Equipment**, and **Other** category in Sage Estimating. You will need to map these cost types to each item in your estimates before exporting the estimates.

6. In the **Sage Construction Management Integration** window:

- a. To add Sage Construction Management cost type information automatically to existing items in your standard database, select the **Add cost types to items** checkbox. You only need to do this once for each standard database you integrate.

Tip: This step can save you time when you match items to Sage Construction Management cost types in your standard database.

- b. Click **[OK]** to return to the Estimating Management Console.
7. If you are integrating an estimate, rather than a standard database:
 - a. Click the **[Browse]** button for the Job Number.
 - b. Select the lead or project to which you will send the estimate.
 - c. Click **[OK]**.
8. Click **[Save]**.

Exporting an estimate to Sage Construction Management

After performing the integration steps in Sage Construction Management and Estimating, you can export an estimate to Sage Construction Management as a **Lead**.

When you export an estimate to Sage Construction Management, each exported line includes the description, unit, and quantity, which you map when you set up the integration. Any item amounts not assigned to a job cost category and job cost code are not exported to Sage Construction Management.

Note: Addons are exported as a single consolidated line to Sage Construction Management and only addons with assigned cost codes and categories are exported.

Before you start

For the estimate you plan to export:

1. In the Estimate Information window, make sure the estimate is integrated with Sage Construction Management. (If you integrated the open standard database, the estimate will be integrated by default.)
2. Assign a lead to the estimate, if one is not already assigned. Use the Job Number Browse button to open a list where you can select a lead from Sage Construction Management.
3. In the estimate spreadsheet, if the current layout does not already include them, display the job cost categories and job cost phases for each estimating cost code. Then, make sure that a job cost category and job cost phase have been assigned to each cost code for which the estimate has an amount. (Note that Estimating exports cost codes as phases to Sage Construction Management.)

To assign a job cost category from Sage Construction Management to an item:

On the estimate item line, in the select job cost category column (for example, Sub JC Cat), select the ellipsis icon , select the appropriate Cost Type ID from the list of Sage Construction Management Cost Type IDs, and then click **[OK]**..

To assign a job cost phase from Sage Construction Management to an item:

On the estimate item line, in the select job cost phase column, select the ellipsis icon , select the appropriate Cost Type ID from the list of Sage Construction Management Cost Code Types, and then click **[OK]**..

To export the estimate to Sage Construction Management:

1. In Sage Estimating, on the **Advanced** tab, select **Export to Sage CM**.
2. On the introductory screen of the Sage Construction Management Export wizard, click **[Next]**.
3. Enter lead and estimate information.
 - a. Beside the **Lead #** field, select the list icon, and then select a lead.
 - b. In the **Estimate #** field, type the code to identify the estimate in Sage Construction Management.
 - c. In the **Estimate Title** field, type a unique name for the estimate.
 - d. Click **[Next]**.
4. In the **Rounding Options** screen, if you want to round quantities, select **Round Accumulated Item Quantities**, and then click **[Next]**..
5. Optionally, specify a destination for the export report, and then click **[Finish]**.

Smoother, tighter integration with eTakeoff Dimension

One-time measurement

You can now create a measurement "on the fly." By skipping setup in the trace library, you don't lose momentum during early takeoff. The item description is used automatically as the measurement name. After creating a measurement in Dimension, the quantity is returned to the estimate line and the measurement appears in the **Measurement Summary** in Dimension.

To create a measurement on the fly:

1. Open the Sage Estimating estimate.
 2. Right-click an item takeoff quantity cell, and then select **Get One-Time Measurement from Dimension**.
- eTakeoff Dimension opens, displaying the last project you worked on.

3. Select the Dimension project, if you are prompted, and then:
 - a. Confirm or edit the prefilled **Measurement name**.
 - b. Select **Count**, **Length**, **Perimeter**, or **Area** as the measurement type.
 - c. Perform the takeoff on the drawing and then press [Enter] to finish adding the measurement.
4. Dimension returns the quantity to the estimate spreadsheet.

Drag and drop measurements from Dimension to Estimating

You can now drag a measurement from Dimension onto an existing estimate line to fill the quantity, creating a drillable link to the takeoff on the correct sheet, enabling faster updates.

To drag and drop measurements from Dimension:

1. Open the Sage Estimating estimate and the Dimension project side-by-side.
2. Drag a measurement from the **Measurement Summary** (or the drawing) in Dimension to the takeoff quantity cell of the target item in the estimate.

Fixes Since the Previous Version

Version 25.2 includes the following fixes:

- On the **External Report** tab in the Estimating Management Console, pressing the **[Refresh]** button correctly restores the grid to its default setting.
- If you are using the Australian date format and integrate Sage Estimating with Sage Intacct Construction, Estimating now correctly passes dates to Intacct.
- Estimating continues to calculate levels for bonds, even when the bond has a duplicate level.

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**.