

Sage Estimating (Desktop) v26.1

Quick Start Checklist

Review this checklist before you install and set up Sage Estimating (Desktop). As you work through these processes, you can check off each task as you complete it.

1. Review hardware and software requirements

Verify that the computer on which you plan to install Sage Estimating (Desktop), and each workstation that requires access to Sage Estimating (Desktop), meets the minimum system requirements.

For current requirements, see the Knowledgebase article [System Requirements: Sage Estimating \(Desktop\) v26.1](#).

Important! Software not listed in the System Requirements article has not been tested by Sage Software and is not supported. If you try to use a newer version of the software or use software not listed, you may encounter technical difficulties.

- ☐ Confirm that the Sage Estimating server meets the minimum *system* requirements.
- ☐ Confirm that each client workstation meets the minimum *system* requirements.
- ☐ Confirm that the server and each workstation meet the minimum *software* requirements (database, operating system, Microsoft programs, and so on).

2. Review the Sage Estimating (Desktop) documentation

Read and understand the following documentation before you install and set up the software:

- ☐ [Sage Estimating \(Desktop\) Release Notes](#)
- ☐ [Sage Estimating \(Desktop\) Installation and Administration Guide](#)
- ☐ [Sage Estimating SQL Server Guide](#)

3. Install and configure Sage Estimating (Desktop)

Follow the instructions in Chapter 3 of the *Installation and Administration Guide* to install the program on a server and workstations. (The chapter also provides steps for other configurations.)

Note: Work through these tasks in the given order.

- ☐ A. Install Sage Estimating
- ☐ B. Install and Configure SQL Server
- ☐ C. Configure Your License Server (License Administration)
- ☐ D. Connect Workstations to Your License Server (Configuration Wizard)
- ☐ E. Connect Workstations to Your SQL Server Instance (Configuration Wizard)
- ☐ F. Install/Upgrade Your Data in Estimating (SQL) (optional)

If you need to **migrate** your data from Estimating (Pervasive), see step 5.

- ☐ G. Set Up Estimating Security

4. After configuring your system

- ☐ Restart all programs and services that you shut down for the installation.
- ☐ If Sage Estimating notifies you of any error conditions, correct the errors before continuing.

5. Migrate your data from Sage Estimating (Pervasive), then upgrade (optional)

Follow the instructions in Chapter 4 of the version 20.1 *Installation and Administration Guide* to move your Sage Estimating (Pervasive) data to Sage Estimating (Desktop) version 20.1. Then, you can upgrade your data to this release.

- ☐ A. Use the Data Migration utility in version 20.1 to migrate the following data:
 - ☐ Estimates
 - ☐ Standard databases
 - ☐ Spreadsheet and report layouts (from your Options file)
- ☐ B. Share any migrated layouts that other Estimating users need
- ☐ C. Upgrade your data to this version

6. When you are ready to use Sage Estimating . . .

Read the following documentation to familiarize yourself with the operation of Sage Estimating, and the integration of other programs that you can use with Sage Estimating:

- ☐ [Sage Estimating \(Desktop\) Getting Started Guide](#)
- ☐ [Sage Estimating Sage 100 Contractor \(SQL\) Integration Guide](#)
- ☐ [Sage Estimating Sage 300 Job Cost Integration Guide](#)
- ☐ [Sage Estimating \(Desktop\) Sage Intacct Construction Integration Guide](#)
- ☐ [Sage Estimating Means Integration Guide](#)
- ☐ [Creating Sage Estimating \(Desktop\) Reports with SAP Crystal Reports](#)