



Sage Estimating (desktop) v26.1

Release Notes

July 2026

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Version 26.1 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 26.1 software. Read these release notes carefully before installing Sage Estimating 26.1.

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 v26.1](#).

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.

Database recovery model requirement for upgrades

During an upgrade, Sage Estimating databases must use the Simple recovery model.

To help ensure a successful upgrade, Sage Estimating now validates the SQL Server recovery model for your databases. Therefore, before you begin the upgrade:

- Verify that all Estimating databases use the **Simple** recovery model.
- Update the recovery model, if needed.

Note: By default, Sage Estimating sets the recovery model to Simple when it creates databases. You need to verify or change this setting only if the recovery model was modified manually.

To verify or change the recovery model:

1. Open SQL Server Management Studio.
2. Right-click the database and then select **Properties**.
3. On the **Options** page, make sure that **Recovery model** is set to **Simple**.
4. Click **[OK]** if you make a change.

You can change the recovery model to a different one after the upgrade.

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.

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 (desktop) version 26.1 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 26.1 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 26.1 before you upgrade to this version.

Installing the Crystal Reports runtime (optional)

When you install Sage Estimating, you can choose whether to install the Crystal Reports runtime.

- Select the option if your company uses Crystal Reports-based reporting, including external or custom reports. The installed runtime matches the version used by Sage 300 Construction and Real Estate, improving compatibility and reporting workflows.
- Clear the option if you do not use Crystal Reports to reduce installation size and time.

Important! If you plan to use Crystal Reports features, you must install the Crystal Reports runtime. You can add it later if needed.

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 an **Install training data** check box, which installs several training companies.

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 (desktop) version 26.1, we have incorporated the following customer requests:

- You can now right-click the row header for an item that's part of an assembly and open Review Assembly directly, reducing extra navigation and making it easier to review assemblies as you work. (Review Assembly is still available when right-clicking the assembly column of an item that is part of an assembly.)

Thank you for your suggestion, Mike.

- In the Estimate Information window, you can now enter decimal values for Project Size. This gives you greater precision when defining project scope and improves consistency across reporting and data exports.

Thank you for your suggestion, Steve.

New Features and Enhancements

Enhancements in Sage Estimating version 26.1 are designed to make your estimating tasks faster, safer, and easier to manage at scale, with a special focus on the Estimating Management Console.

- In the Estimating Management Console, a new **Estimate Recycle Bin** helps protect against accidental deletions. Instead of permanently removing an estimate immediately, deleted estimates can now be reviewed, restored, or permanently removed based on your organization's security settings.
- Also in the Estimating Management Console, you can make changes across multiple estimates at once in the estimate grid, edit key fields directly in the grid, and customize columns without losing your layout. These improvements are designed to reduce repetitive work and help you clean up or update large groups of estimates more confidently.

In addition, several enhancements focus on preventing accidental changes and making editing safer. Improved validation, better undo behavior, and clearer prompts help ensure that changes are intentional and reversible, reducing frustration when working quickly.

- You now have greater control over how estimate information is displayed. Enhancements to column management, user-defined fields, and notes make it easier to see exactly what matters to you—without opening individual estimates or resetting your view. These changes are especially helpful when working with large lists of estimates or custom fields.
- We have improved integration with eTakeoff Dimension, Sage Construction Management, and Sage 300 Construction and Real Estate.
- There is a variety of miscellaneous improvements in the Estimating Management Console and in the Estimating spreadsheet.

The following sections explain these improvements in more detail.

Estimate Recycle Bin

The new Estimate Recycle Bin, available from the ribbon in the Estimating Management Console, provides a safer way to manage deleted estimates, helping prevent accidental data loss and improving the audit trail.

When you delete an estimate, its data is moved to a Recycle Bin instead of being removed permanently, allowing you to recover estimates when needed. In addition:

- You can control who is allowed to permanently delete estimates using a new security option, reducing the risk of accidental or unauthorized deletions.
- Deleted estimates now include audit information that record when and by whom an estimate was removed.
- During upgrades, invalid or removed estimates are moved to the Recycle Bin for review, helping preserve data integrity.

More flexibility in the Estimating Management Console estimate grid

The estimate grid in the Estimating Management Console is even more powerful and flexible. For example, you can now review and update estimates directly in the grid reducing the need to open individual estimates.

Editing and data entry

The following improvements make it easier to update multiple estimates while reducing accidental errors:

- You can edit the **Estimator** and **Project Type** directly in the grid, which means you no longer need to open each estimate to make these updates.
- You can view and edit **Units** directly in the grid and the estimate form, making it easier to correct job size or duration units without navigating away from your work.
- You can fill a value across multiple selected rows in the estimate grid, allowing you to update fields such as project types, estimators, or custom values across many estimates in one action instead of editing them individually.
- You can toggle the **Totals Allowed** value using the keyboard, helping you move quickly through rows when enabling or disabling totals without relying on mouse clicks.
- Job size and expected duration fields now prevent entry of values that exceed allowed limits, reducing invalid data and preventing downstream calculation issues.
- When editing user-defined fields, the grid now enforces the field's data type and constraints, helping ensure numeric, list, and date fields contain valid values.

Columns, layout, and visibility

These enhancements give you more control over how the grid looks and behaves, making it easier to tailor views without losing your layout.

- You can now hide columns directly from the grid header even when the grid is sorted, removing the need to clear sorting just to adjust what is visible.
- You can restore hidden columns without resetting your entire grid layout, making it easier to experiment with different views while preserving your customizations.
- You can insert new columns at a specific location using the column header context menu, rather than having new columns always appear at the end of the grid.
- You can use **Best Fit** to automatically resize a column to match its contents, reducing manual resizing and improving readability.
- When dragging columns to reorder them, the grid now shows a clearer visual drop indicator, helping you place columns exactly where you intend.
- New columns are now added in the same order as the default layout, making customized grids more predictable and easier to maintain.
- Numeric values and column headers are now right aligned, improving scanability and making numeric comparisons easier.
- You can now add columns for each level of the estimate tree in the Estimate grid, making it easier to group, sort, and analyze estimates by branch level. These columns reflect the estimates visible from the selected folder in the tree.

Note: The column previously named **Ancillary files directory** is now named **Attachments folder**, making its purpose more clear.

Shortcut menus and estimate actions

The following enhancements reduce friction when managing estimates directly from the grid.

- You can now duplicate an estimate directly on the grid.
- You can also delete an estimate directly from the grid, with confirmation to help prevent accidental removal.
- The row header context menu now includes **Edit**, **Save**, and **Cancel** actions, giving you more control over when changes are committed or discarded while working in the grid.

Notes and special columns

These updates make notes easier to manage and reduce accidental edits:

- You can now edit **Named Notes** directly in the Estimate Grid, allowing you to review and update notes without opening the estimate.

- **Notes** and **Named Notes** now support grouping, sorting, and filtering, making it easier to find and manage notes in large estimate lists.
- We added a dedicated **Totals Note** column, making totals-related notes easier to see and edit.
- **Note** columns now include ellipsis (...) buttons, making it clearer how to open and edit note content.
- The grid now prevents accidental note editing when typing, reducing unintended changes while navigating the grid.

User-defined fields

These enhancements improve clarity and usability when working with custom fields.

- User-defined field columns now display names from the default standard database, helping you understand what each column represents without guessing or cross referencing.
- List-based user-defined fields now display comma separated values directly in the grid, making it easier to review multi-value fields at a glance.
- New date formatted user-defined field columns allow you to view and edit date values directly in the grid, rather than relying on text fields.

Estimate Information

These enhancements improve clarity and reduce errors when working with estimate details.

- The Estimate Information window now shows the estimate's branch name, helping you quickly confirm where an estimate is stored—especially useful in multibranch environments.
- When you clear a company value, the associated person is now cleared automatically, reducing inconsistent or orphaned contact data.
- The Estimate Information window now allows decimal values for **Project Size**, allowing for greater precision.
- Job cost integrations now appear in a more logical order in the Estimate Information window, making them easier to locate and configure.

Enhancements in the Estimating application

- The **Open Estimate** window is available again from the ribbon and the File menu, providing an alternate way to open estimates rather than using the Estimate Catalog. Also, the keyboard shortcut **Ctrl+O** now opens the Open Estimate window.

- In the Detail window, the **Extension** tab includes a **Total** row, making it easier to review the full amount for an item without leaving the tab.
- You can paste a column of values from Microsoft Excel into a selected column in the spreadsheet, making it faster to update estimate data from external worksheets. This enhancement supports column-based pasting for existing lines without creating new line items.
- You can also copy a column of cells from the spreadsheet, making it easier to reuse estimate data in other areas of Sage Estimating or in external tools.
- On the **Estimate Totals** page, the default precision for the Rate column is now two decimal places instead of three.
- When you have many note tabs in the **Notes** window, you can now scroll through the tabs more easily. You can also use a new drop-down list to quickly select the note you want to work with.
- Undo behavior has been improved to include drag-and-drop actions in the undo stack, enabling you to reverse changes more reliably.

Also, the undo stack is preserved when combining items or applying and removing filters, preventing the loss of undo history during common workflows.

- A confirmation prompt now appears when dragging items between sort levels, helping prevent accidental structural changes.

Other usability, workflow, and platform improvements

These enhancements improve overall safety, consistency, and reliability across the application.

- Visual improvements in the **Address Book** indicate behavior more clearly and the toolbar now has a new delete button (✖), making it easier to manage contacts and companies.
- A new Welcome page appears when you start Estimating v26.1 that contains some highlights from this release and other information that you may find useful. You can display this page again from the File menu in Estimating.
- Additional platform, performance, and reliability improvements improve stability and startup behavior, including .NET Core and SQL enhancements.

Reporting and related enhancements

Reporting is more reliable, including improvements to exporting and handling deleted estimates.

- Installing the Crystal Reports runtime is now optional. If you use advanced reporting features (such as external or custom Crystal Reports), select the option when you install Sage Estimating. If you do not use Crystal-based reporting, you can skip this component to simplify your installation.

In addition, the Crystal Reports runtime has been updated to match the version Sage 300 Construction and Real Estate uses.

- External Reports databases now include company and contact names directly in reporting views, making it easier to create reports without creating complex queries or combining data manually.
- You can now enter Job Size values with up to two decimal places for more accurate estimating.

To preserve compatibility with existing reports, the existing **JobSize** column continues to store the rounded (whole-number) value.

A new **JobSize2** column that contains the decimal value is available from the [Report].[ProjectInfo_v1] table in estimating and report databases. When creating or updating custom or external reports, use JobSize2 when you need decimal precision.)

- You can export reports to Excel even if your system blocks older Excel file types. Sage Estimating ensures that reports open in modern versions of Excel without requiring changes to Excel security or trust settings. This feature was developed for a single customer as a Beta feature and is included in this release for all customers to use at your own risk. You are welcome to suggest additional enhancements to this export feature.
- When you delete an estimate, External Reports removes it fully from the external reports database.
- External Reports recovers the Generate button reliably after unexpected interruptions.

Enhanced integration with eTakeoff

In version 26.1, we improved the ways you can use Takeoff quantities in estimates, reducing setup time and complexity.

- When you copy and paste a takeoff quantity that is linked to an eTakeoff Dimension variable, the link stays with the pasted quantity so you can reuse the same trace on multiple items more easily. You can also choose **Paste Quantity Only** when you want to paste just the value without the link.
- You can now drag a measurement quantity, even if it's not the default quantity, from the **eTakeoff Measurement List** directly to a **Takeoff Quantity** cell in the spreadsheet, making it easier to choose the exact measurement value you want to use for an item. We also improved validation when you drag and drop values, so assigning linked quantities is more reliable.
- When eTakeoff breakdown values use the same names as your Estimating WBS values, Sage Estimating can now map them automatically when you assign quantities. This helps carry breakdown information into your estimate with less manual entry.

Enhanced integration with Sage Construction Management (SCM)

- You can now send estimate information to a project as well as to a lead, giving you more flexibility in how you connect estimating work with SCM.
- You can now refresh lead, project, and cost code lists directly from the integration lists, helping you work with the latest available data without leaving the window.

Fixes Since the Previous Version

This section describes the issues that were resolved in Sage Estimating version 26.1.

Estimate management (Estimating Management Console and Manage Estimates)

- Minority and women amounts are displayed with the correct decimal precision, and zero values show as blank where expected.
- Estimate grids now remember layout changes consistently after you switch branches.
- Item counts in estimate lists now reflect only included items, matching the estimate spreadsheet total.
- Estimates now remain properly locked for editing, preventing data corruption.
- After duplicating an estimate from the Estimating Management Console, the source estimate's lock status now refreshes correctly in the tree.

Estimate Information

- Numeric user-defined fields now accept negative values, so you can enter the full range of numbers you need.
- On the Alternate Summary, allocated addons are no longer duplicated when all alternates are excluded.

Estimate spreadsheet

- The **Items Selected** value on the status bar now counts selections more accurately, even when you select individual cells.
- Formula table lists no longer show duplicate entries when you navigate with the arrow keys.
- You can now add a new spreadsheet layout using the plus (+) button, and the layout is saved for future use.
- **eTakeoff Dimension** drag-and-drop now completes more reliably by continuing the drop process without blocking dialogs.
- Merging large estimates with the **Combine Items** option is much faster.

Notes

- Renamed named notes now update immediately, without needing to close and reopen the dialog.
- When working with named notes, you can double-click navigation controls to move between tabs without unintended interruptions.
- You can now delete a named note and save your changes as expected.

Reports

- The **Print estimate totals** option in the Variance and Comparison report settings now remains selected as you navigate between tabs or save and restore layouts, so your report preferences are preserved.
- When working with External Reports, authorization errors during database activation display more helpful messages explaining why activation failed and what action to take next.

Database Editor

- Row highlighting now clears correctly after you resolve duplicate phase/item entry errors.
- New WBS values you add in Database Editor now appear immediately in the selection list.
- Creating filters on WBS and other text-based columns now works as expected, with date pickers available for date fields.
- Database Editor now opens more reliably for databases connected to Sage Construction Management.

Import and export

- **Alternate Summary** and other Excel exports now handle estimate names with special characters by creating a valid Excel file name.
- Changes to standard database alternate status are now imported correctly from Excel.
- Exporting very large estimates is now supported, allowing export files larger than 4 GB.

Integrations

- The integration with Job Cost in Sage 300 Construction and Real Estate now provides clearer feedback when a response includes an error, helping you troubleshoot setup issues.
- When setting up Job Cost information on a standard database, you can now change the company selection and continue setup without errors.

- When working with Sage Intacct jobs, Estimate Information now handles missing end dates so you can continue without interruption.
- With Sage Construction Management, you can now choose a lead and a cost code in the same session more reliably.
- Sage Construction Management cost code lists now load past duplicates, so you can continue working even if duplicate codes exist in Sage Construction Management.
- Means Integrator updates now run faster when repricing all items without specifying item ranges.

Configuration and upgrade

- When restoring an estimating database, SQL Server administrators who aren't already set up in Estimating can now complete the restore without security-related interruptions.
- Configuration Wizard can now create and associate an address book database more reliably after restoring a database from another system.
- Upgrades from older versions now complete more reliably when legacy logins are missing, reducing upgrade interruptions.

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**.