



Sage Estimating v26.1

Sage Construction Management Integration Guide

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Chapter 1: About the Sage Construction Management Integration Guide

If you use Sage Construction Management, you can transfer estimate information directly into your job costing application. This enables you to access budget and transaction data without reentering the information. This guide covers the interface between Sage Estimating and Sage Construction Management Job Cost, which enables the information transfer.

Read the Supporting Documentation Before You Begin

- The *Installation and Administration Guide* includes an overview of this release, installation instructions, system requirements, and contact information.
- The *Release Notes* provide details about new features, database changes, known issues, and fixes.
- The *Getting Started Guide* provides an operational overview of the Sage Estimating software.
- 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.

Conventions Used in this Guide

This guide 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**.
- Names of keys are also shown in bold font. For example: **Enter** or **Tab**. A plus sign (+) between two key names indicates you should press the keys simultaneously.
- The names of buttons you can click are shown in bold font and enclosed in brackets. For example: **[OK]** or **[Post]**.
- Variable names or names that are specific to your installation may appear in italics and brackets. For example: *[Drive]\[Server]*.

Menu Paths

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

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

Need help?

Use Sage Estimating Help or a variety of self-help resources to get answers to your questions.

The Help System

Sage Estimating Help provides more efficient access to 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.

Sage Estimating displays Help in your default browser. If you have an Internet connection, it displays the most current Help for your version of Sage Estimating from the Sage Estimating Help website. If you have no connection (you are working offline), it displays Help that was current when the software was released and installed on your computer when you install Sage Estimating.

Important! Because the Microsoft Edge browser does not display locally installed help properly, we recommend that you select a different default when working offline.

To get Help on a window option

To display Help for an option in a window, 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.

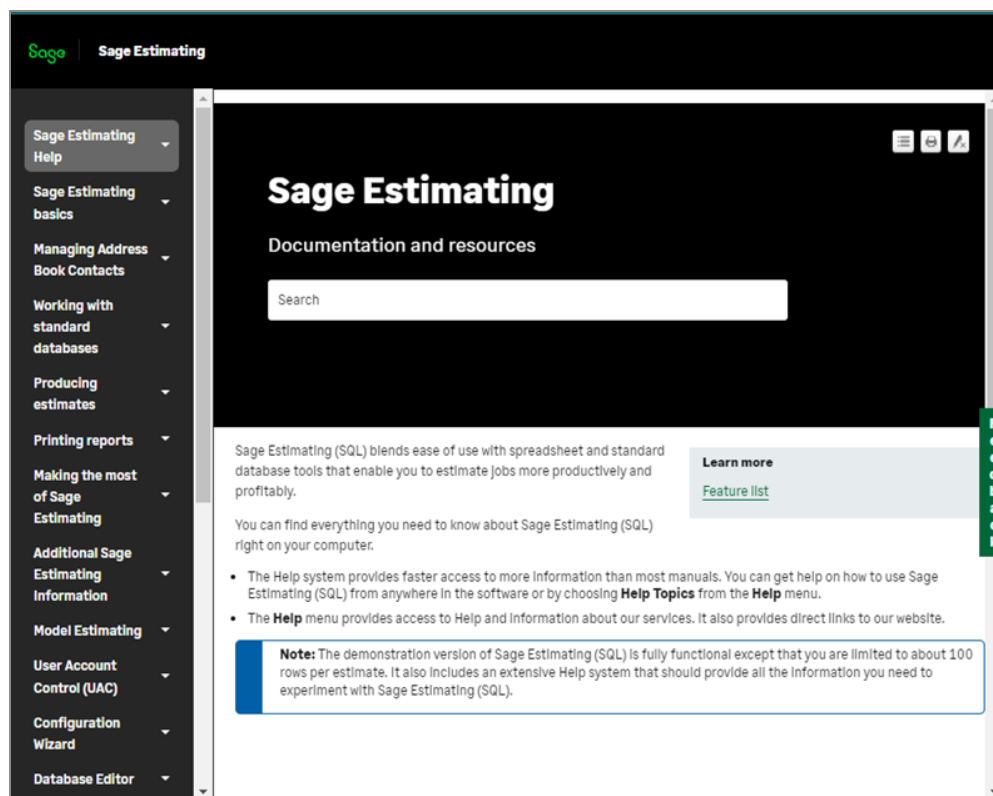
To get Help for the whole window

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.

To use Help to learn how to do tasks

1. Click **[Help]** on the toolbar or select the **Home** tab > **Help** group > **Help**.

The Help Window



2. Use the navigation pane to begin looking for a topic.

- Help subjects are organized under headings. Select the heading for the type of task you want to perform to view a list of topics.

When you see the topic you want, double-click it to display it.

- Select the **Glossary** heading to view an alphabetical list of definitions of terms used throughout the Sage Estimating software.

3. Use the **Search** box to find articles that match the keywords you enter.

Additional self-help resources

The Help menu available from on the ribbon also provides convenient links to a variety of self-help resources.

The Help menu in Ribbon view

Help Topics		
What's New		
Product Documents		
Sage Support ▶	Knowledgebase	
Online Community	Downloads and Updates	
The Users Group	Live Chat	
Sage University	Enter a Support Ticket	
Sage Estimating Home Page	Support Utilities ▶	Remote Support Session
Submit Product Idea		
About Sage Estimating		

How to Get Additional Help

Get help by:	Recommendation*	To access:
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 the File menu button  and then select **Help > Submit Product Idea**.

Chapter 2: Sage Construction Management Integration

If you use Sage Construction Management, you can export estimates directly from Sage Estimating to a lead in that program, where you can work with the estimate without having to reenter or import the information.

Overview

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 Estimating.
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.

Note: This guide covers the interface between Sage Estimating and Sage Construction Management, which enables the information transfer. For detailed information about Sage Construction Management, see the [Sage Construction Management in-product Help](#).

Setting up the integration with Sage Construction Management

To help ensure a smooth data transfer between Sage Estimating and Sage Construction Management, follow the guidelines in this section.

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.
 - f. In the **Scopes** section, select **Add**, **Edit**, and **Read**.

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!

- 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 ManagementIntegration** 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]**.

Chapter 3: Exporting Data to Sage Construction Management

After performing the integration steps in Sage Construction Management and Sage 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 estimate data 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]**.