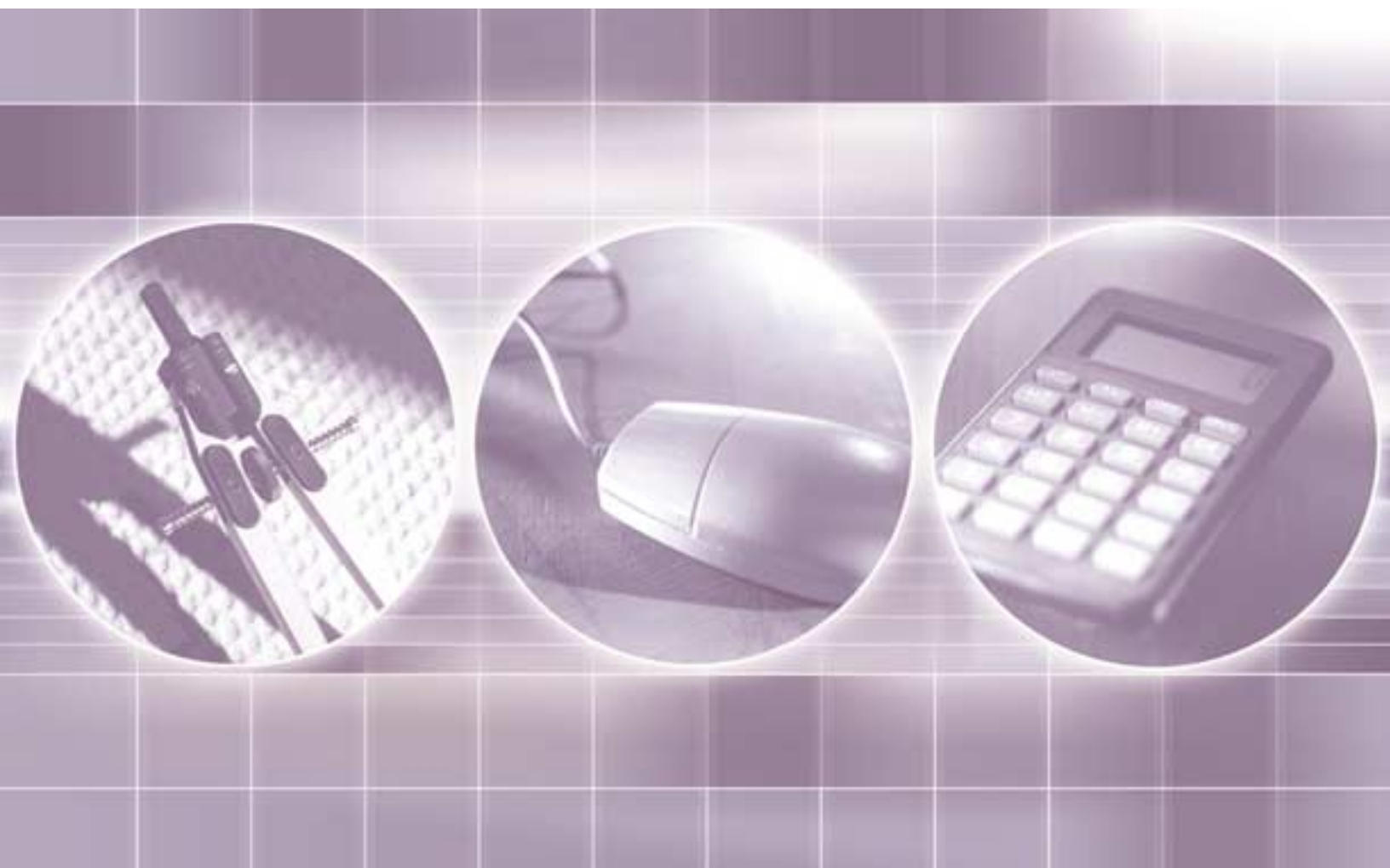


Estimator^{PRO} 5.0TM

construction software made simple

USER'S GUIDE



Estimator*PRO* 5.0 User's Guide

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OVERVIEW

Estimator*PRO* 5.0 is an Excel-based program that uses the power and intuitiveness of Excel to enable you to create accurate estimates to the desired level of detail. Estimator*PRO* 5.0 operates using 3 files: Estimator*PRO*.xlt, Estimator*PRO*DB.xls, and Estimator*PRO* Addin.xla.

Estimator*PRO*.xlt is a template that when opened, creates a new file (Estimator*PRO*1.xls). This new file can be saved with a recognizable project name such as “Lot 12 Country Cove.xls”. This workbook (Estimator*PRO*1.xls—or whatever name you may have saved it as) contains the Cost Breakdown Summary sheet, a cost summary of all the phases of construction. The Cost Breakdown Summary sheet pulls in company overhead and profit, and calculates a bid amount for the project.

The Estimator*PRO*1.xls workbook also holds all of the detailed estimating sheets for each of the phases of the project. Detail estimating sheets allow the estimator to choose the level of estimating to perform. A lump sum or an allowance can be entered for each phase of construction. For most detail sheets, a unit cost can alternatively be used to calculate a cost (i.e. cost per SF). Another method of estimating to choose from is the detailed estimate. For each phase of construction, detailed estimates can be quickly created from which purchase orders are generated. The cost total from each of the detail sheets is automatically linked back to the Summary sheet.

Key takeoff numbers, such as Finished Floor SF and Footing Length can be entered into the Key Information sheet. These numbers are then utilized throughout the estimating program, which saves the estimator from entering information more than once.

Estimator*PRO*DB.xls is a workbook that contains all of the database items and corresponding units and unit costs. Costs may be stored for 3 or more suppliers or tradecontractors. You may change or add items to any of the databases.

The database is a file that can be constantly updated while you work on your estimates. As you update costs, change items, etc., you should save the file.

The database may be saved under different names (i.e. “March 2002.xls”) so that historical costs can be kept. Also, the estimating detail workbook can be connected to any database that you have saved. The last sheet in the estimating detail workbook (Figure 2.4) walks you through the process of connecting different databases.

Estimator*PRO* Addin.xla is an add-in file that contains the procedures or macros. It is the engine that runs the automated features of Estimator*PRO*. It is not a file that you need to change, save, or worry about.

System Requirements

To use this software, it is recommended that you have Microsoft® Excel 2000 or higher installed on your computer. Some of the features of Estimator*PRO* are not available in Microsoft® Excel 97. If you already own an earlier version of Microsoft® Excel, you can purchase the upgrade to Microsoft® Excel 2000 for a reduced price. Microsoft® Excel 2000 runs on Windows 2000, Windows NT, and Windows XP.

If you want to use QuickBooks Pro with Estimator*PRO* 5.0, you will need QuickBooks Pro 2002, 2003 or QuickBooks Premiere Contractor Edition.

Your hardware will make a big difference to how well Excel performs. A minimum of 32 megabytes of RAM memory is required. Anything above that would be preferred. Your computer's processor should be at least 133 megahertz. Most new processors run at 800-megahertz speed or faster.

Installing EstimatorPRO

1. Click the **Start** menu button (the button on the lower left of the Windows screen) and choose **Run**.
2. Then click on the **Browse** button and navigate to the location of the CD drive (usually the E or D drive).
3. Select the Setup.exe file and click the **Open** button.
4. Verify that the name of the file is correct and press **OK**. The files will be installed to the C:\Program Files\EstimatorPRO subdirectory.

EstimatorPRO comes with an Add-in file (EstimatorPRO Addin.xla), which is the engine that runs EstimatorPRO. The setup program will make the add-in file available for use by Microsoft Excel.

Upgrading EstimatorPRO

If you are a current user of EstimatorPRO and are upgrading to a newer version, you must uninstall the current version of EstimatorPRO before installing the upgrade version.

1. Before uninstalling the current version of EstimatorPRO, you will want to back up the database file (EstimatorPRO DB.xls) by saving it as a different name (i.e. EstimatorPRO DBJan2002.xls) to a different directory.
2. To uninstall the current version of EstimatorPRO, click the **Start Menu**, click **Settings, Control Panel, Add/Remove Programs**, and then select the current version of EstimatorPRO and click the **Remove** button.
3. Once the old version of EstimatorPRO has been removed, check that the add-in has also been deleted. Open Excel, click on **Tools, Add-Ins** and uncheck the box next to Estimatorproaddin (Figure 1.1). A box may appear to confirm that you want to remove the add-in. Click **Yes**.

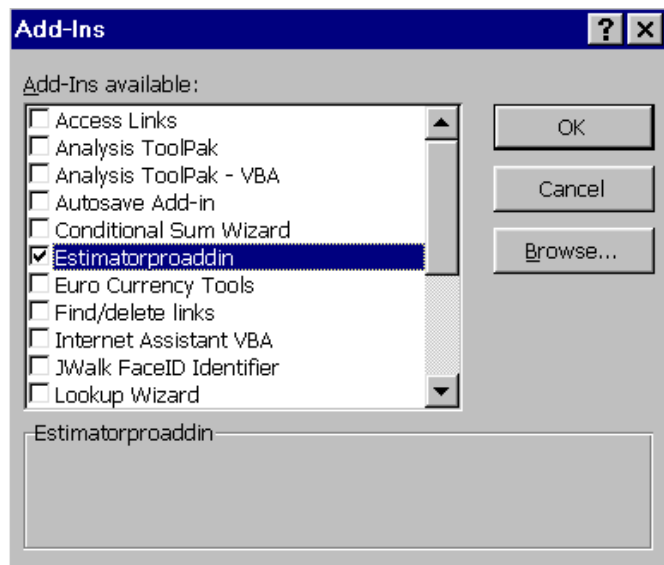


FIGURE 1.1 REMOVING THE ESTIMATORPRO ADD-IN

4. You can now install the upgraded version of EstimatorPRO by following the steps listed above (Installing EstimatorPRO).

Common Problems

Sluggishness or Crashes when Opening or Saving Estimator*PRO*

If you notice that Estimator*PRO* is particularly slow when you try to open or save, exit all of the applications. Then, open **My Computer** from the desktop (or open the Explorer from the Start menu), delete the files from the Temp folders, especially the **C:\Windows\Temp\mso.emf** files (i.e. **mso10E.emf**).

NOTE: If you are having a hard time locating the .mso or .emf files, click the **Start** menu, Search, and then enter either mso or emf and click Search. Any of these files that are found in Temp folders should be deleted. You will notice an immediate improvement in speed when using Estimator*PRO*.

Technical Support

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Help in making custom changes to your Estimator*PRO* can be contracted at an hourly rate.

Builders and remodelers agree that the amount of time that it takes to complete an accurate estimate is the number one problem with estimating. Computers have made it possible to create detailed and accurate estimates in a fraction of the time that it takes to do by hand (paper and pencil method). Yet, those who use computerized estimating systems often complain that their software is too complex or too difficult to use. Other criticisms are that the software is too expensive or it does not meet their needs because the software doesn't "estimate the way I do it."

An increasing number of construction professionals are using computer spreadsheets to solve their estimating problems. The benefits of using computerized spreadsheets for estimating are:

- They are inexpensive; most builders and remodelers already own spreadsheets programs that were installed on their computers when they purchased them.
- They are easy to use.
- They can be customized to your style of estimating.
- They are fast.
- They are powerful.

Spreadsheet estimating allows for easy customization and can reduce the time it takes to do an estimate to one or two hours.

Estimator*PRO* is an economical Microsoft® Excel-based estimating spreadsheet template that is designed for those who require powerful estimating capabilities. Its intuitive quality makes it possible to learn in just minutes. It can easily be customized to meet your estimating needs. You will gain greater confidence in your estimates while, literally, saving hours of time for each estimate that you complete.

New Features and Improvements for Estimator*PRO* 5.0

Integrates with QuickBooks Pro (2002, 2003, and QuickBooks Premiere Contractor Edition)

- Export estimates directly to QuickBooks.
- Export purchase orders directly to QuickBooks.
- Keep track of contacts, whether they are suppliers, trade contractors or customers with the new Contacts database. Easily sort and organize your contact information to suit your needs. Import existing contact information directly from QuickBooks.
- Export Estimate and POs to Text Files or Excel Files. This feature is for users who are not using QB for their accounting. Users can send the estimate and/or purchase orders to a text file or excel file which can then be imported into an accounting system.

Organize Estimates

- Arrange the Cost Estimate Summary Sheet in the order that you create estimates.

Course of Construction
NAHB Chart of Accounts
CSI Master Format

- **Project Information Sheet**—This sheet summarizes the information for the job. This information is used to send estimates and purchase orders to the correct job in QuickBooks.

Improved Design

- Advanced Sorting and grouping capabilities. Search capabilities make it easy to find what you're looking for.
- Automatically update your entire estimate by linking items to multiple phases of construction.
- Improved Key Information form. Key information that is used throughout an estimate can more easily be organized and used to speed up the estimating process.

Improved Summary Sheet Customization

- More easily add and rearrange Custom Phases to the Summary sheet.

CHAPTER 2 Getting Started

Estimator*PRO* makes use of circular references. If you do not have Microsoft® Excel's Iteration feature enabled, you will need to open Excel and initiate the iteration feature that is needed for the circular references to function.

Go to **Tools, Options, Calculation** on the **Menu** toolbar and click the box next to Iteration (see Figure 2.1)

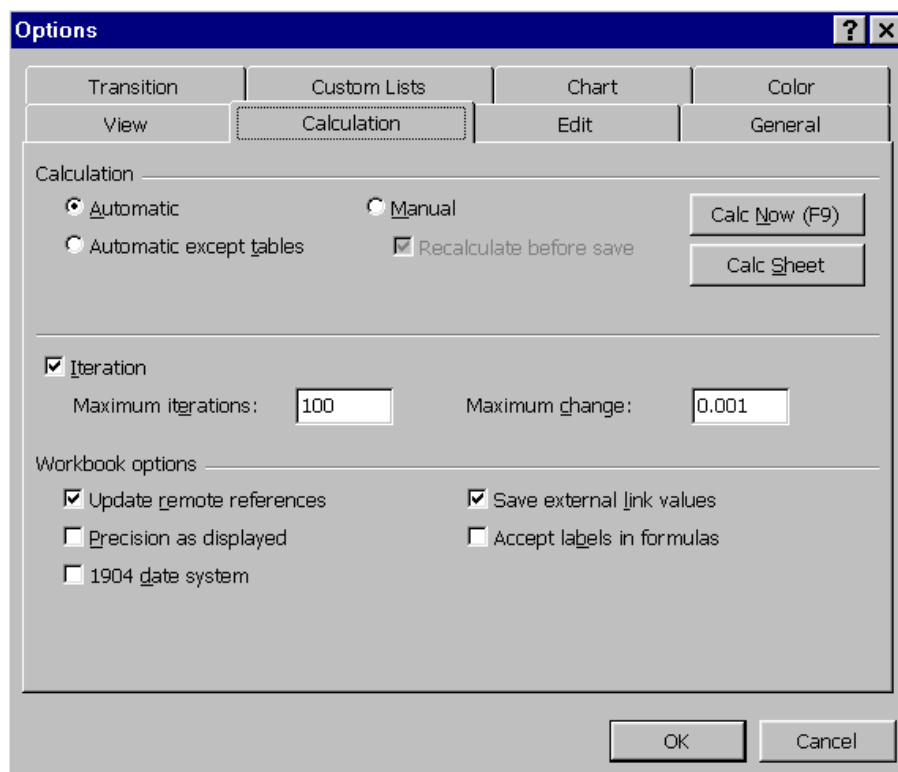


FIGURE 2.1: TURN ON ITERATION TO ALLOW FOR CIRCULAR REFERENCES

Opening Estimator*PRO*

To open Estimator*PRO*, click the **Start** menu, **Program Files**, and select Estimator*PRO* then Estimator*PRO* 5.0.

This action opens **EstimatorPRO.xlt**, which is a template file that opens as Estimator*PRO*1. If you open a second instance of **EstimatorPRO.xlt**, the file name will be Estimator*PRO*2 and so forth.

When Excel opens files that contain macros (procedure code which performs the functions of the spreadsheet) it will display a warning sign letting you know that the workbook contains macros. Because macros

from unknown sources can contain viruses, the displayed pop-up box allows you to stop the workbook from loading the macros.

Check the box **Always Trust This Source**.
Choose **Enable Macros**.

NOTE: When opening with Windows 2000 or XP for the first time, you will be prompted with the question, "Is this file from a trusted source?" You can check the "always trust" box (Figure 2.2) and click on Enable Macros so that in the future, you won't be asked if you want to enable macros each time you open EstimatorPRO.

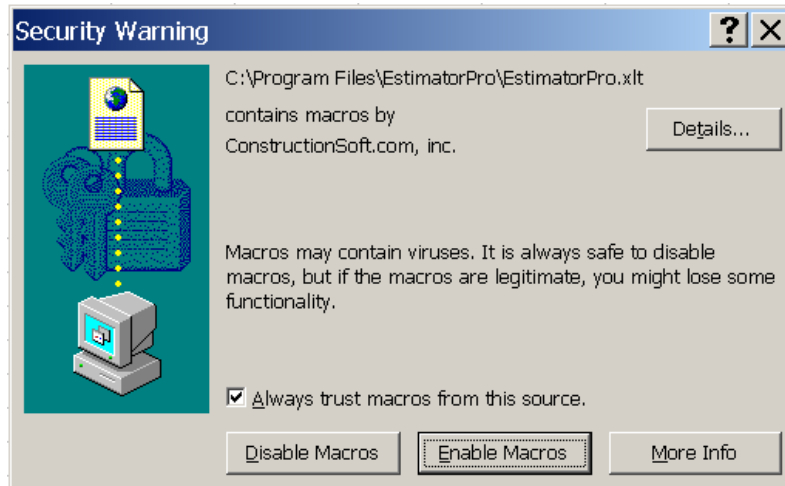


FIGURE 2.2 CHECK THE "ALWAYS TRUST MACROS" AND "ENABLE MACROS"

As the file opens, a box will open (see Figure 2.3) asking if you want to update links or keep the existing information.

Click **No**.

Because the EstimatorPRO1.xls file has links to the database file (**EstimatorPRO DB.xls**), it asks if you want to connect those links without opening the database file. If you answer Yes, the computer will freeze up while trying to open all of the links. It's better to say No and wait until the database file is opened to automatically establish all the links.

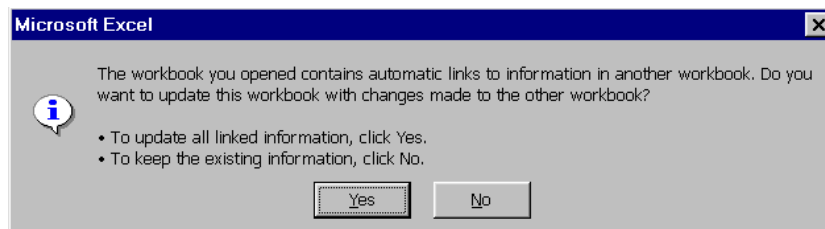


FIGURE 2.3 UPDATE LINKED INFORMATION

Saving Your File

Once the EstimatorPRO1.xls file is open, it is wise to save it with the name of the project that you are estimating (for example, **Meadow Brook 37.xls**). You may also wish to put the current date in the name of the estimate (for example, **MB37 Jan 15 2004**).

1. To use the **Save As**, function the original disk must be in the CD-ROM disk drive.
2. To save the file with a new name, click **File, Save As** and enter the name of the file and choose the location where you want to save the file.

Choosing Your Database

You will normally want to use the default database; **C:\Program Files\EstimatorPro\EstimatorProDB.xls**. There are times when you may want to connect the estimating detail sheets to a different database, such as when comparing current costs with historic costs or connecting with a specialty database. After *EstimatorPRO* is opened, you will want to choose which database to use. The database holds all of your pricing information including item descriptions, quantities and formulas (to calculate quantities), units, and unit costs.

1. Move to the last sheet in the Estimator by moving to the last sheet tab and clicking on the tab name DatabaseLinks.

OR

Move by clicking either on the Preview Sheets button or the Go To Sheet button on the **EstimatorPRO Navigation Toolbar** (see Figure 2.4) and select the DatabaseLinks sheet (see Figure 2.5).

2. Click on the Change Database Link button and navigate to the database that you want to use. The *EstimatorPRO Database.xls* is the default database and is located in the **C:\Program Files\EstimatorPRO** directory. It is a good idea to create a separate folder to store additional databases, for example, **C:\Projects\Databases**.

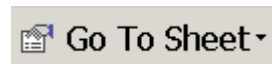


FIGURE 2.4 PREVIEW SHEETS AND GO TO SHEET BUTTONS

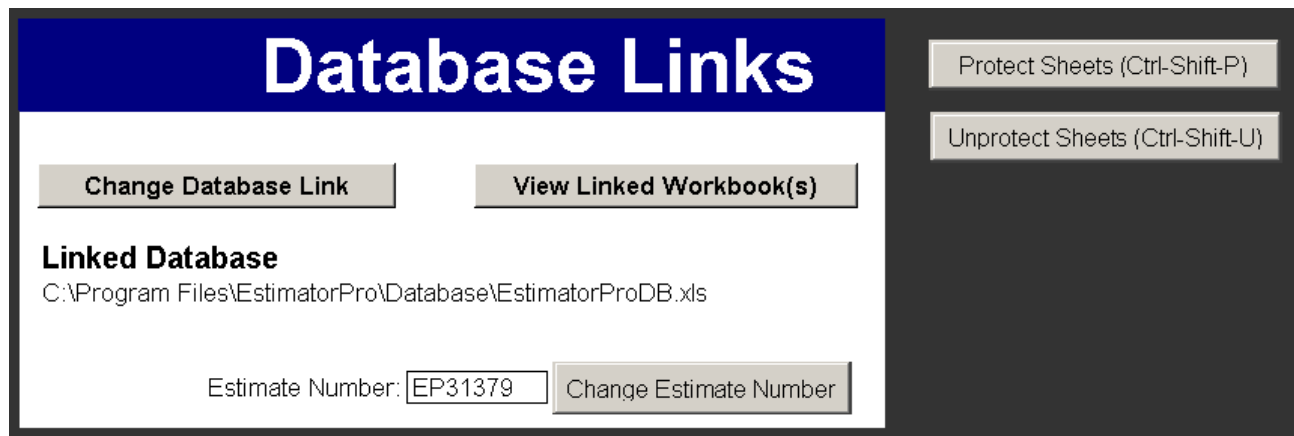


FIGURE 2.5 DATABASE LINKS SHEET

Occasionally, as you make updates to your cost data, you may want to save a copy of your database with the current date so that you have an historical record of your prices (for example, **EstimatorPRO Database Feb 8, 2004.xls**).

CHAPTER 3 **Navigation and Utilities**

There are two toolbars that come with Estimator*PRO*: the Estimator*PRO* Navigation Toolbar and the Estimator*PRO* Utilities Toolbar. These toolbars can be placed in the most convenient locations for your use. You can move a toolbar by clicking near the inside edge of the toolbar and dragging it to a new location on the screen.

NOTE: Click on the gray area of the toolbar with the left mouse button and while holding the button down, drag the toolbar to the desired location on edge of the screen typically near the top with the other toolbars.

The Estimator*PRO* Navigation Toolbar

The Estimator*PRO* Utilities Toolbar has eight different buttons (See Figure 3.1). These buttons help with moving and finding your way around the estimating sheets.

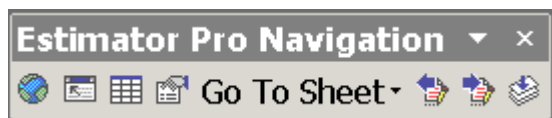


FIGURE 3.1 ESTIMATOR*PRO* UTILITIES TOOLBAR



GoTo Summary

This button will always take you to the Summary sheet from whichever sheet you may be working on in Estimator*PRO*.



GoTo Detail

Clicking this button when working with the database sheets will take you to the corresponding detail sheet.



GoTo Database

Clicking this button when working with the detail sheets will take you to the corresponding database sheet.



Preview Sheets

By clicking on the Preview Sheets button (see Figure 3.2), you can see all the worksheets in chronological order or in alphabetical order. You can also preview the sheets before you activate them. By clicking on the 4-directional arrows, you can move the view of a previewed sheet. You can preview the preceding or the following sheet by clicking either the Prev(ious) arrow button or the Next arrow button.

Go To Sheet ▾

Go To Sheet

Clicking the Go To Sheet button drops a list of worksheets to choose from. Click the desired worksheet to activate it. The list can be displayed in alphabetical order or in the sequence of the sheet tabs.



GoTo Previous Sheet

Activates the sheet to the left of the active sheet.



GoTo Next Sheet

Activates the sheet to the right of the active sheet.



The Back Sheet Button

The last button on the Estimator*PRO* Navigation Toolbar is the Back Sheet button. Clicking the Back Sheet button activates the sheet that was active previous to the one currently active. This button is useful in getting back to whatever sheet you were just on.

NOTE: Remember, you can move any toolbar to any location on the screen, top, bottom, left side, or right side, whichever is most comfortable for you to work with.

The Estimator*PRO* Utilities Toolbar

The Utilities Toolbar has seven buttons (see Figure 3.4). These buttons provide helpful estimating utilities and perform powerful spreadsheet tasks.



FIGURE 3.4 THE ESTIMATOR*PRO* UTILITIES TOOLBAR

Key Information Button

The first button on the Utilities Toolbar, the Key Information button, accesses information from the Key Information worksheet. The Key Information sheet holds important information that will be used throughout the estimate such as square footage data, material tax rates, and desired overhead and profit percentages, etc. You can learn more in detail about this function in [Chapter 4, General Overview](#).

Pop Up Calculator Button

The Pop Up Calculator has a general calculator, a Loan and Amortization calculator, and a Lumber calculator. Instruction on how to use the calculator is given in [Chapter 9, Specialty Calculators](#).

Page Utilities

The Page Utilities toolbar selection (Figure 3.5) has a number of powerful features that help to make your job easier. Each is described below.

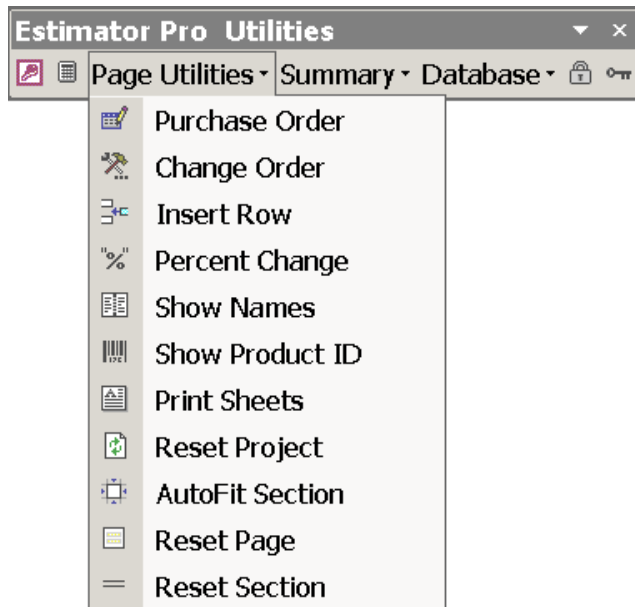


FIGURE 3.5 PAGE UTILITIES MENU

Purchase Order

The Purchase Order button can be selected to create purchase orders for vendors and trade contractors. See [Chapter 4 General Overview](#) for additional help on how to create a purchase order.

Change Order

The Purchase Order sheet can be clicked to create change orders for vendors and trade contractors. See [Chapter 4 General Overview](#) for additional help on how to create a change order.

Insert Row

This button is to be used primarily on the Database sheets. It can be used to insert rows between items to add new items to the database. Be sure that you are inside the named range of cells that make up the database.

1. To verify that all of your database items fit within the database's named range, with the database sheet active (showing), click on the Show Names button and click on the database name (for example, **EntryDoorDB**).
2. If all the database items are not within the selected area of the named range, then click the Change Refer (Change Reference) button and change the reference of the name by selecting all of the cells that should be part of the database.

NOTE: You can also insert a row (above a selected line) by right mouse clicking on the row number (on the left side of the sheet) and clicking insert. If you need to delete a row, right mouse click on the row number and click delete.

Percent Change

See "Percent Change" under "Database Utilities" in [Chapter 7, Database Utilities](#).

Show Names

This button shows the names of cells and ranges in the active sheet (see Naming Cells and Ranges of Cells). Clicking a name will activate the cell and display its value in the edit bar (Figure 3.6). You can quickly see which cells the names refer to and you can change the references of the cells or ranges of cells that the names refer to. You can hide, unhide, or find named ranges of cells.

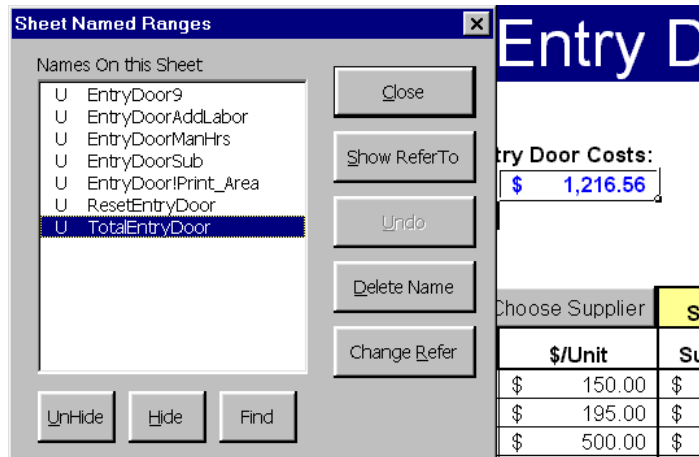


FIGURE 3.6 NAMED CELLS AND RANGES ON THE ACTIVE SHEET

Show Product ID

The supplier's product identification number can be displayed on the detailed estimating sheet by selecting Show Product ID from the **Page Utilities** menu. Product IDs can be input while in the database by clicking on the **Database** icon in the toolbar and then selecting the Edit Product ID button.

Print Sheets

This menu selection allows you to print any or all worksheets in the workbook. You can name a group of worksheets so that you can print that group with one command. You can also choose to fit printed worksheets to one sheet.

Reset Project

This menu item will clear all of the items from the estimate and zero out any quantities and item costs.

AutoFit Section

The AutoFit button will remove any blank lines in a detailed item list.

Reset Page

This menu item will clear all of the items on a worksheet and zero out any quantities and item costs.

Reset Section

This menu item will only clear the items in a section and zero out any associated quantities and item costs.

CHAPTER 4 General Overview (How to Use EstimatorPRO)

► DEMO

There are three types of worksheets in EstimatorPRO that you will use to estimate: the Cost Breakdown Summary sheet, various Detail sheets, and the Project Information and Key Information sheets.

The Cost Breakdown Summary Sheet

The first sheet you see when you open EstimatorPRO is the Cost Breakdown Summary Sheet (see Figure 4.1). The Summary Sheet is a compilation all the costs of a project; all the detail sheets are summarized on a single worksheet. Company overhead and profit are also added to the material, labor, and equipment costs to determine the final sales or bid price.

Estimator Pro

☐ Set Date
 Aug 6, 2003

Estimate Number: EP31397

Customer's Names:

Home Phone:
Business Phone:

Project Name:
Project Address:

Lot Number:
Subdivision:

Total Sales Price: \$ (0.00)

Add Draw

Delete Draw

Code	Project Overhead & Lot	Est. Cost or Bid	Draw 1	Draw 2	Draw 3	Variance
1000	Lot	\$ -				\$ -
	Permit and Fees	\$ -				\$ -
	Architecture & Engineering	\$ -				\$ -
	Temporary Utilities	\$ -				\$ -
	Construction Loan	\$ -				\$ -
	Supervision	\$ 0.00				\$ 0.00
	Contingency	\$ 0.00				\$ 0.00
	Real Estate Commission	\$ -				\$ -
	Subtotal - Project OH & Lot	\$ 0.00	\$ -	\$ -	\$ -	\$ 0.00

Code	Hard Costs	Est. Cost or Bid	Draw 1	Draw 2	Draw 3	Variance
	Demolition	\$ -				\$ -
	Earthwork	\$ -				\$ -
	Footings	\$ -				\$ -
	Foundation	\$ -				\$ -
	CMU Foundation	\$ -				\$ -
	Flatwork	\$ -				\$ -
	Miscellaneous Steel	\$ -				\$ -
	Window Wells	\$ -				\$ -
	Dampproofing	\$ -				\$ -
	Utility Laterals	\$ -				\$ -
	Septic System	\$ -				\$ -
	Potable Water Well Allow.	\$ -				\$ -
	Framing Material	\$ -				\$ -
	Framing Labor	\$ -				\$ -
	Entry Doors	\$ -				\$ -
	Garage Doors	\$ -				\$ -
	Windows	\$ -				\$ -

FIGURE 4.1 ESTIMATORPRO SUMMARY SHEET

Detail Sheets

Figure 4.2 shows a typical detail sheet. The detail sheet is where items are selected for take-off, quantities are entered, and costs are automatically extended. You may choose between two methods of estimating—either lump sum bid (or allowance) or detailed estimating. By clicking the Detail Estimate option button and then clicking the Add Item button, detailed items can be selected for the take-off. Quantities can then be entered. Some quantities are automatically calculated and entered based on the formulas that are in the QTY column in the database. The estimating method you choose will determine which value to use in cost Breakdown Summary Sheet.

Garage Door Detail				
Choose Estimating Method <input type="radio"/> Lump Sum <input checked="" type="radio"/> Detail Estimate		Total Costs: Enter Amount: \$ 1,045.34		
Garage Door	Add Item	Choose Supplier		Supplier 2
Description	QTY	Unit	\$/Unit	Sub-Total \$
18x8 Non-Insulated	1	EA	\$ 668.85	\$ 668.85
1/2 HP Opener	1	EA	\$ 220.50	\$ 220.50
Keyless Entry	1	EA	\$ 42.00	\$ 42.00
Extra remotes	2	EA	\$ 26.25	\$ 52.50
End				
		Labor Sub-Total: \$ - Material Sub-Total: \$ 983.85 Sales Tax: <input checked="" type="checkbox"/> \$ 61.49 Total Cost: \$ 1,045.34		

Material DB

Items	Close
16x8 Non-Insulated	Add Item
16x7 Insulated	Insert Item
16x7 Non-Insulated	Edit DB
9x8 Insulated	Insert Line DB
9x8 Non-Insulated	Undo
9x7 Insulated	Clear Line
9x7 Non-Insulated	Change Cell
8x8 Insulated	
8x8 Non-Insulated	
8x7 Insulated	
8x7 Non-Insulated	
1/2 HP Opener	
3/4 HP Opener	
Keyless Entry	
Extra remotes	
<input type="checkbox"/> Input Qty <input type="checkbox"/> Overwrite Qty	

FIGURE 4.2 TYPICAL DETAIL SHEET

The Database

All of the item descriptions, QTY formulas, units and unit costs that are used in the detail sheets are stored in EstimatorPRO's database workbook (C:\Program Files\EstimatorPro\EstimatorProDB.xls). You can delete, add, or modify items and enter unit costs based on a specific supplier or trade contractor (Figure 4.3). You can enter default quantities into the QTY column or formula's that automatically calculate quantities can be entered or you can just leave the value blank and let the estimator enter the quantity at the time of take-off.

Garage Door Database			Date Updated: _____		
Description	QTY	Unit	Supplier 1	Door Supply	Ace Doors
18x8 Insulated	1	EA	\$ 687.00	\$ 721.35	\$ 757.42
18x8 Non-Insulated	1	EA	\$ 637.00	\$ 668.85	\$ 702.30
18x7 Insulated	1	EA	\$ 650.00	\$ 682.50	\$ 716.63
18x7 Non-Insulated	1	EA	\$ 570.00	\$ 598.50	\$ 628.43
16x8 Insulated	1	EA	\$ 609.90	\$ 640.40	\$ 672.42
16x8 Non-Insulated	1	EA	\$ 509.99	\$ 535.49	\$ 562.27
16x7 Insulated	1	EA	\$ 579.99	\$ 608.99	\$ 639.44
16x7 Non- Insulated	1	EA	\$ 459.99	\$ 482.99	\$ 507.14
9x8 Insulated	1	EA	\$ 399.99	\$ 419.99	\$ 440.99
9x8 Non-Insulated	1	EA	\$ 339.99	\$ 356.99	\$ 374.84
9x7 Insulated	1	EA	\$ 359.99	\$ 377.99	\$ 396.89
9x7 Non-Insulated	1	EA	\$ 299.99	\$ 314.99	\$ 330.74
8x8 Insulated	1	EA	\$ 379.99	\$ 398.99	\$ 418.94
8x8 Non-Insulated	1	EA	\$ 319.99	\$ 335.99	\$ 352.79
8x7 Insulated	1	EA	\$ 279.99	\$ 293.99	\$ 308.69
8x7 Non-Insulated	1	EA	\$ 249.99	\$ 262.49	\$ 275.62
1/2 HP Opener	1	EA	\$ 210.00	\$ 220.50	\$ 231.53
3/4 HP Opener	1	EA	\$ 190.00	\$ 199.50	\$ 209.48
Keyless Entry	1	EA	\$ 40.00	\$ 42.00	\$ 44.10
Extra remotes	1	EA	\$ 25.00	\$ 26.25	\$ 27.57
Labor - HR	1	HR	\$ 29.40	\$ 30.87	\$ 32.42
Labor - EA	1	EA	\$ 210.00	\$ 220.50	\$ 231.53

FIGURE 4.3 GARAGE DOOR DATABASE

Key Information and Project Info Sheets

The Key Information worksheet stores important information about a project, such as square footage data, material tax rates, and desired overhead and profit percentages (Figure 4.3—behind the Key Information pop-up box). The first button on the Estimator*PRO* Sheet Utilities launches the Key Information pop-up form (see Figure 4.4—foreground). This screen displays key information from the Key Information worksheet that is directly related to the estimating of a specific detail sheet. The information on the Key Information worksheet can be used in formulas and to enter quantities throughout the estimate.

SF of Building		--SF--
Main Floor SF		1850
2nd Floor SF		920
3rd Floor SF		
Bonus Room SF		
Finished Basement SF		
Total Finished SF		2770

Unfinished SF of Building		--SF--
Unfinished Basement SF		1850
Garage SF		875
Covered Porch SF		760
Deck SF		525

Construction Loan	
Expected Duration of Project (months)	
Interest Rate	

Footings	
LF of Footings	
LF of Footings 4'	
LF of Footings 8'	

FIGURE 4.4 KEY INFORMATION FORM

You can use the Key Information pop-up form (Figure 4.5) to quickly check important values, insert values into the worksheet or to create links from the Key Info sheet to a cell, or to calculate areas and waste.

1. Activate the Key Information form by clicking the red key on the **Estimator*PRO* Sheet Utilities** toolbar.
2. To insert a value from the form into a worksheet (Figure 4.5), click on a cell in the worksheet, click the value that you want to insert from the Key Information form, then click Insert.

Information in the Key Information worksheet can be modified directly on the sheet or through the Key Information form. When you change a value that is shown in the Key Information pop-up form, it will automatically update (change) the value in the Key Information worksheet.

Roofing Detail

4

Choose Estimating Method	
<input checked="" type="radio"/> Lump Sum	
<input type="radio"/> Detail Estimate	

Slope 1	
Enter Plan SF of Roof Here:	2954
Enter Rise / 12" Run:	8
Slope Factor:	1.202
Waste Factor:	5%
Additional Squares:	
Squares:	37.33

Enter LF of Fascia:	230
Enter LF Starter Strip:	160
Enter LF of Ridge:	80

Slope 1	
Enter Total of Hip Dimensions A:	
Hip Factor:	1.563
Waste Factor:	5%
Total LF:	0

Detail Estimate

Key Information

Roofing

Plan View SF of Roofing (incl. ov)	2954
Slope (Rise/12)	8
LF Fascia	230
LF Starter Strip	160
LF Ridge	80
LF Hip	0

Labor

Labor Base	25.00
Labor Burden	5%
Total Labor Rate	26.25

Room Description --LF Wall'-- --Height'--

Kitchen		
Laundry		
Dinning		

The following Formula will Overwrite the current cell contents

=KeyInfo!\$D\$43*1

☐ Value
☒ Formula
☒ Overwrite
☐ Add

☐ Multiply
 Column2 x
 Column3

☒ Multiplication
 Factor

1

☐ Division
 Factor

1

Insert

Close

Edit Sections

Goto Key Info

<<Hide

FIGURE 4.5 USING KEY INFORMATION POP-UP BOX TO ENTER DATA INTO ROOFING DETAIL SHEET

The Key Information Form shows only those indices from the Key Information sheet that you choose. You can select which indices to show in the Key Information form by clicking on the Edit Sections button. The Edit Key Information form (Figure 4.6) is displayed. You can choose which key items to display for each detail sheet, and you can arrange the order that the key items appear when the Key Information button is clicked.

Edit Sections

Available Sections:

SectionCustom 1
 SectionCustom 2
 SectionCustom 3
 SectionCustom 4
 SectionFlatwork

>

<

Displayed Sections:

SectionProfit
 SectionTax
 SectionSFBuilding
 SectionSFBuilding1
 SectionConstructionLoar
 SectionExteriorWalls
 SectionInteriorWalls
 SectionFTG

^

v

Priority

OK

Cancel

FIGURE 4.6 EDIT KEY INFORMATION SECTIONS FORM

The Project Information Sheet

The project information sheet stores important information about the project (Figure 4.7). Some of the information that is entered in the Project Information worksheet is used in other parts of the estimate. Other information is for your reference only. Some of the Project and Customer information is used on the Cost Breakdown Summary sheet and on some of the other reports. The project customer names are required information for exporting the estimate to QuickBooks.

Project Information	
Project information	
Project Name:	
Project Number:	
Project Address:	
City:	
State:	
Zip:	
Lot Number:	
Lot ID:	
Lot SF:	
Community/Subdivision:	
Permit Number:	
Supervisor:	
Customer Info	
Name:	
Address:	
City:	
State:	
Zip:	
Home Number:	
Business Number:	
Fax:	
Mobile:	
Email:	
Contractor Information	
Company Name:	
Company Address:	
Contact Name:	
Business Number:	
Fax:	
Mobile:	
Email:	
License Number:	

FIGURE 4.7 PROJECT INFORMATION SHEET

There may be times when you want to start over on a project. To clear out all of the selections and quantities, click Page Utilities on the Estimator*PRO* Utilities toolbar and then click Reset Project.

Creating a Purchase Order

Once you have completed a detailed estimate, a purchase order can be created using Estimator*PRO*. Let's use a Framing Material detail sheet that has a list of items needed for the floor framing (Figure 4.8).

To add items to the Purchase Order:

1. Select the items from the detail sheet that you want to be included in the purchase order.
2. Select Purchase Order from the **Page Utilities** toolbar. A form pops up with the information that will be sent to the purchase order (Figure 4.8).
3. Check to ensure the items, quantities, units, unit costs, and subtotal are correct.

NOTE: With the Items to Include in Purchase Order pop-up box showing, items from other detail sheets can be added by first, selecting the items on the detail sheet to add and then by clicking on the first open cell under the "Description" column and clicking the Add button.

Framing Material		Add Item		Choose Supplier		Supplier 3
Description	Est. QTY	Unit	Waste Factor	QTY	\$/Unit	Sub-Total \$
-----1st Level Floor -----		0	0%	0	\$ -	\$ -
3-1/2"X40' Sill Sealer	6	RL	5%	7	\$ 4.13	\$ 28.91
2 x 4 Treated .40	222	LF	5%	234	\$ 0.44	\$ 102.96
1/2" Washers	112	EA	5%	118	\$ 0.09	\$ 10.62
2 x 10 - 10	10	EA	5%	11	\$ 11.81	\$ 129.91
2 x 10 - 12	18	EA	5%	19	\$ 14.18	\$ 269.42
2 x 10 - 14	42	EA	5%	45	\$ 15.68	\$ 705.60
2 x 10 - 16	29	EA	5%	31	\$ 16.75	\$ 519.25
4 x 8 - 3/4" OSB T&G	67	EA	5%	71	\$ 10.03	\$ 712.13
Construction Adhesive 29oz	17	EA	5%	18	\$ 5.23	\$ 94.14
End						

Items to Include in Purchase Order

Description	Qty	Unit	\$/Unit	Sub-Total \$
-----1st Level Floor -----	0	0	\$0.00	\$0.00
3-1/2"X40' Sill Sealer	7	RL	\$4.13	\$28.91
2 x 4 Treated .40	234	LF	\$0.44	\$102.96
1/2" Washers	118	EA	\$0.09	\$10.62
2 x 10 - 10	11	EA	\$11.81	\$129.91
2 x 10 - 12	19	EA	\$14.18	\$269.42
2 x 10 - 14	45	EA	\$15.68	\$705.60
2 x 10 - 16	31	EA	\$16.75	\$519.25
4 x 8 - 3/4" OSB T&G	71	EA	\$10.03	\$712.13
Construction Adhesive 29oz	18	EA	\$5.23	\$94.14

Add
Create PO
Close
☐ Product ID
☒ Auto
☒ Increment PO Number

FIGURE 4.8 PURCHASE ORDER FORM

4. Once all the desired items are included on the pop-up purchase order form, click the Create PO button. The items will be added to the purchase order sheet (Figure 4.9).

The Auto check box allows you to have the computer automatically place the estimate items in the Insert Purchase Order Items box and should normally be checked. With the check mark off, you can enter estimate items in the columns that you prefer.

Insert Your
Company
Logo
Here

Company Name

Address
City, State ZIP
Phone

Purchase Order No. 1

4

Increment PO Number

Choose Supplier/Vendor

Choose Ship to Address

Save Purchase Order

Reset Items

Reset Page

Show Product ID

Send PO to Quickbooks

PURCHASE ORDER

Supplier / Trade Contractor

Name: East Bayshore Tool & Supply

Attn: Eric Hansen

Address: 5111 N. Grand Ave

City: E. Bayshore

State: CA Zip Code: 92781

Tax ID: _____

Ship To

Name: _____

Attn: Bryan Ruff

Address: 4308 Sonoma Dr.

City: E. Bayshore

State: CA Zip Code: 92781

Description	Qty	Units	Unit Cost	TOTAL
-----1st Level Floor -----	0	0	\$ -	\$ -
3-1/2"X40' Sill Sealer	7	RL	\$ 4.13	\$ 28.91
2 x 4 Treated .40	234	LF	\$ 0.44	\$ 102.96
1/2" Washers	118	EA	\$ 0.09	\$ 10.62
2 x 10 - 10	11	EA	\$ 11.81	\$ 129.91
2 x 10 - 12	19	EA	\$ 14.18	\$ 269.42
2 x 10 - 14	45	EA	\$ 15.68	\$ 705.60
2 x 10 - 16	31	EA	\$ 16.75	\$ 519.25
4 x 8 - 3/4" OSB T&G	71	EA	\$ 10.03	\$ 712.13
Construction Adhesive 29oz	18	EA	\$ 5.23	\$ 94.14
			Sub-Total	\$ 2,572.94
			Shipping & Handling	
			Tax	\$ 160.81
			Total	\$ 2,733.75

Date: ✓ 24-Jul-03

FIGURE 4.9 COMPLETED PURCHASE ORDER

The vendor or tradecontractor information and the ship to address can be manually entered or automatically entered by clicking the Choose Supplier/Vendor button and the Choose Ship to Address button.

The completed purchase order can then be saved to the workbook or to another workbook by clicking the Save Purchase Order button. Items in the PO or on the whole page can be cleared by clicking the Reset Items or the Reset Page buttons. Product IDs that are associated with PO items can also be displayed on this sheet.

For instructions on exporting purchase orders to QuickBooks, see [Chapter 8, QuickBooks Interface](#).

Creating and Keeping Track of Change Orders

All change orders are summarized on the Cost Breakdown Summary sheet. A change order is created from a detail estimate worksheet. By clicking the Change Order from the Page Utilities menu on the Utilities toolbar, a change order detail sheet is created. Select additional items and their quantities (or negative quantities if you are reducing the original estimate).

All change orders are recorded in the Change Order Summary Sheet. The totals of Change Orders for each phase can also be displayed on the Cost Breakdown Summary sheet (click Change Order (Show/Hide) from the Summary menu item on the Utilities toolbar).

CHAPTER 5 Summary Sheet

The first sheet you see when you open Estimator*PRO* is the Cost Breakdown Summary Sheet (see Figure 5.1). The Summary Sheet compiles all of the costs of a project. Company overhead and profit are also added to the material, labor, and equipment costs to determine the final sales or bid price.

Estimator Pro

☐ Set Date
 Jul 22, 2003

Estimate Number: EP31391

Customer's Names:

Home Phone:
Business Phone:

Project Name:
Project Address:

Lot Number:
Subdivision:

Total Sales Price: \$ -

Code	Project Overhead & Lot	Est. Cost or Bid	Draw 1	Draw 2	Draw 3	Variance
1000	Lot	\$ -				\$ -
	Permit and Fees	\$ -				\$ -
	Architecture & Engineering	\$ -				\$ -
	Temporary Utilities	\$ -				\$ -
	Construction Loan	\$ -				\$ -
	Supervision	\$ -				\$ -
	Contingency	\$ -				\$ -
	Real Estate Commission	\$ -				\$ -
	Subtotal - Project OH & Lot	\$ -	\$ -	\$ -	\$ -	\$ -

Code	Hard Costs	Est. Cost or Bid	Draw 1	Draw 2	Draw 3	Variance
	Demolition	\$ -				\$ -
	Earthwork	\$ -				\$ -
	Footings	\$ -				\$ -
	Foundation	\$ -				\$ -
	CMU Foundation	\$ -				\$ -
	Flatwork	\$ -				\$ -

FIGURE 5.1 COST BREAKDOWN SUMMARY SHEET

Summary Sheet Dropdown Menu Options

There are several buttons that will help you when working with the Summary sheet. While some buttons are located right on the Summary sheet, most are located in the Summary drop-down menu on the Estimator*PRO* Utilities toolbar (Figure 5.2).

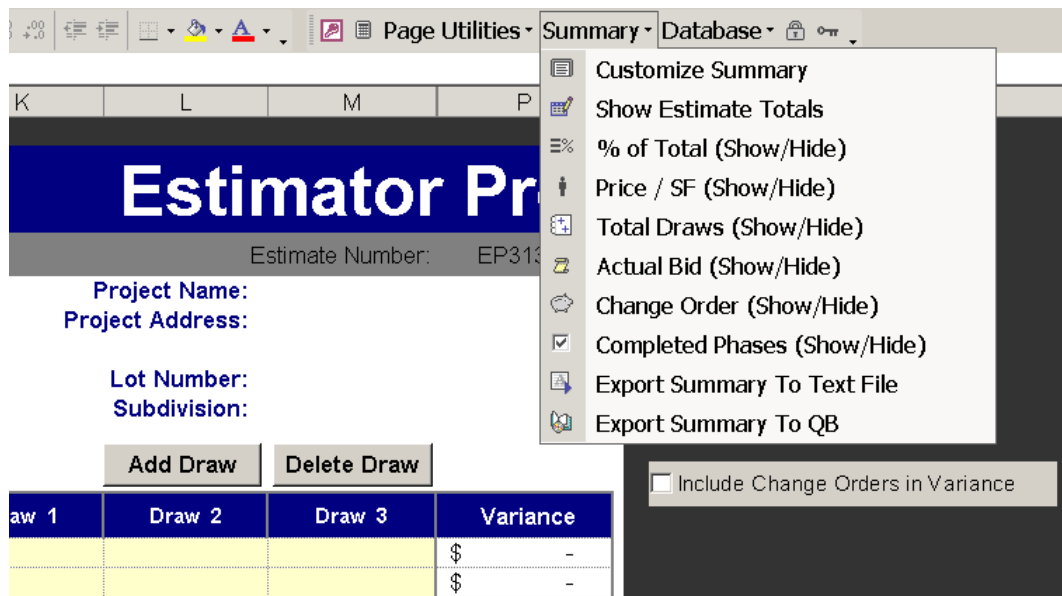


FIGURE 5.2 COST BREAKDOWN SUMMARY SHEET BUTTONS

Customize Summary Sheet Button

The Summary sheet can be customized to meet your individual estimating needs. Custom phases can easily be added to the phases that already exist and phases that you won't be using can be hidden on the Summary sheet. The order that phases appear on the summary sheet can also be changed. The first of the selections on the Summary drop-down menu is the Customize Summary button. When clicked, it opens the Change Summary Order dialog box (Figure 5.3).

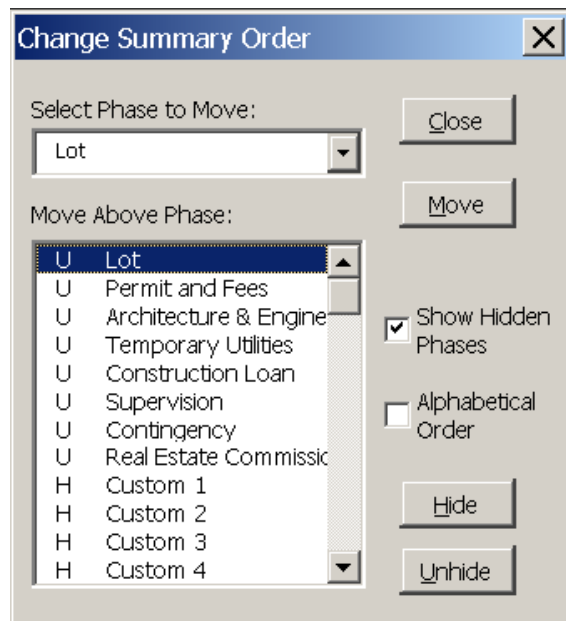


FIGURE 5.3 CUSTOMIZE SUMMARY BUTTON

To Create a Custom Phase

1. When the pop-up dialog box appears, be sure a checkbox next to the Show Hidden Phases box is checked.
2. Choose one of the custom worksheets by clicking on the sheet name (Custom 1 through Custom 30) and then clicking the Unhide button.
3. Close the pop-up box and you will see the custom phase shown on the Cost Breakdown Summary sheet.

To Rename a Custom Phase

1. Click on the hyperlinked custom phase name that you just created (i.e. Custom 1) in the Cost Breakdown Summary Sheet. It will send you to the Custom 1 detail sheet.
2. Click the Change Sheet Name button and type in the name that you have chosen for the new worksheet (the new phase name).
3. If you have not already opened Estimator*PRO*'s Database, you will be asked if you want to open it at this time. Click YES. The new phase name will now be shown on the Cost Breakdown Summary, the Customer Summary, the Executive Summary, and the Change Order Summary sheets.

To Move the Location of Phase on the Summary Sheets

1. First, click the Customize Summary Button from the Summary dropdown menu.
2. In the Select Phase to Move box, select the phase that you want to move (typically, the new phase name you have created).
3. In the lower box, the Move Above Phase box, select the phase above which you want to move the phase that listed in the upper box (the Select Phase to Move box).
4. Then, click the Move button. The phase will be moved to the new location on all of the summary sheets.

Make your changes in Estimator*PRO* permanent

The file that contains the Summary sheet and all of the Detail sheets and Reports is Estimator*PRO*.xlt, a template file, that when opened, creates a copy of itself and is named (Estimator*PRO*1.xls). If you open Estimator*PRO* again, this second instance of Estimator*PRO* is named EsitmatomPro2.xls, and so on. These files Estimator*PRO*1.xls, Estimator*PRO*2.xls etc., can be saved with names referring to specific jobs (i.e. **Johnson.xls** or **35 Crystal Springs.xls**).

If you make a change to Estimator*PRO* that you want to make permanent, in other words, the changes are present every time you open Estimator*PRO*, you will need to save these changes over the original **Estimator*PRO*.xlt file**. To do this:

1. Open Estimator*PRO*.
2. Make the desired changes.
3. **Click** File/Save As and choose Template (*.xlt) from the Save as Type drop-down box (Figure 5.4).

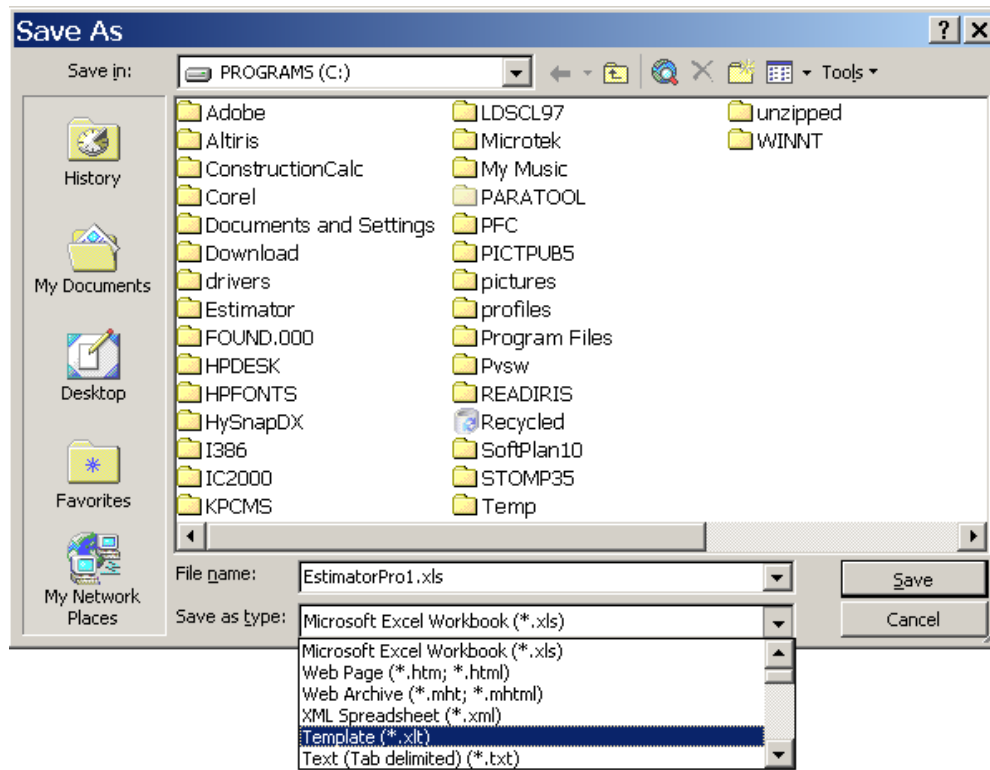


FIGURE 5.4 CREATING A NEW ESTIMATORPRO TEMPLATE FILE

4. Click on the Save In box's down-arrow and navigate to **C:\Program Files\Estimator Pro** and click on the existing **EstimatorPro.xlt** file (Figure 5.5).
5. Verify that the name in the File name box is **EstimatorPro.xlt**.
6. Click Save.

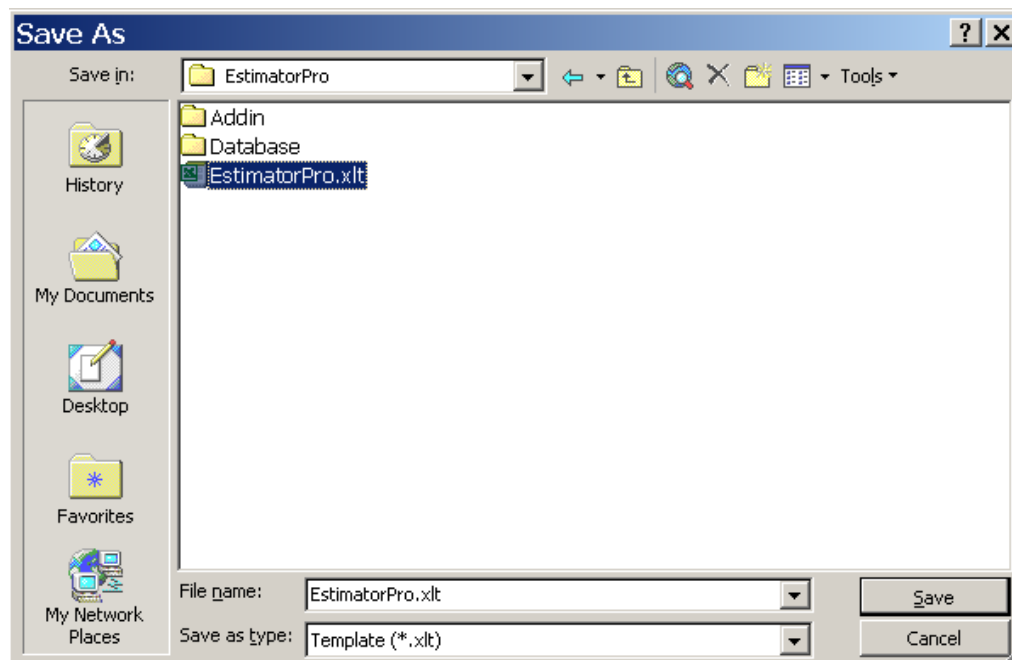
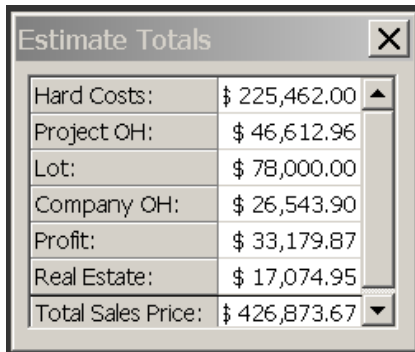


FIGURE 5.5 SAVING THE NEW TEMPLATE FILE ESTIMATORPRO.XLT

The next time that EstimatorPRO is opened, you will see the changes that you have saved.

Show Estimate Totals

When the Show Estimate Totals button is clicked from the Summary drop-down menu, the Estimate Totals pop-up box is displayed (Figure 5.6). This box can be positioned in an out-of-the-way location on your screen where it will stay while you are working on your estimate. It immediately displays the bottom-line effects of any change that you make to the estimate.



Estimate Totals	
Hard Costs:	\$ 225,462.00 ▲
Project OH:	\$ 46,612.96
Lot:	\$ 78,000.00
Company OH:	\$ 26,543.90
Profit:	\$ 33,179.87
Real Estate:	\$ 17,074.95
Total Sales Price:	\$ 426,873.67 ▼

FIGURE 5.6 SHOW ESTIMATE TOTALS

Percentage of Total

By clicking the % of Total button, an additional column on the Cost Breakdown Summary sheet displays the estimated amount for each phase as a percentage of the total sales price

Price per Square Foot

By clicking the Price / SF button, an additional column on the Cost Breakdown Summary sheet displays the estimated amount for each phase as a price per SF.

Total of Draws or Disbursements

By clicking the Total Draws button, an additional column on the Cost Breakdown Summary sheet displays the total of all of the actual bank draws or disbursements for a particular phase.

Actual Bid

By clicking the Actual Bid button, an additional column on the Cost Breakdown Summary sheet is displayed where you can enter an actual bid amount which can be compared to the estimated amount for each phase; however, the bid total is determined from the estimated costs and not the actual bid amounts.

The Customer Bid Form

The Customer Bid Proposal Form (see Figure 5.7) can be used in putting together a bid proposal for a project. The customer bid can display the total bid price including the cost breakdown for each of the phases or the cost breakdown figures can be hidden so that only the total bid price is on the form.

Company Name
 Address
 City, State ZIP
 Phone

Customer's Names:
 Home Phone Number:
 Work Phone Number:

Bid Proposal
 Date: 10/31/00
 Total Bid Price: **\$106,463.64**

Bid Includes:

Lot	\$45,000.00	Earthwork	\$1,640.00
Permit and Fees	\$12,850.00	Footings	\$3,400.00
Plans & Engineering	\$1,100.00	Foundation	\$8,562.00
Temporary Utilities	\$520.00		\$348.00
Construction Loan	\$4,670.00	Window Wells	\$1,358.00
Supervision	\$1,596.95	Damproofing	\$300.00
Contingency	\$1,064.64	Utility Laterals	\$1,345.00

Contractor Notes:

Payment Schedule:

Buttons: Reset Page, Edit Bid Proposal Item(s), Hide Breakdown Section

FIGURE 5.7 CUSTOMER BID FORM

1. You can select the phases that you want to show on the bid form by clicking the Edit Bid Proposal Item(s) button on the right side of the page. The Customer Bid Phase-Selection Form will be displayed (see Figure 5.8).
2. Click the boxes of the phases to include on the bid form. It may be that you only want to show allowance items in the bid.
3. You can save selections that you might use multiple times by giving the selection a name. The named selections can be retrieved to quickly produce a customer bid.

☒ Lot \$45,000.00
☒ Permit and Fees \$12,850.00
☒ Plans & Engineering \$1,100.00
☒ Temporary Utilities \$520.00
☒ Construction Loan \$4,670.00
☒ Supervision \$1,596.95
☒ Contingency \$1,064.64
☐ Demolition \$0.00
☒ Earthwork \$1,640.00
☒ Footings \$3,400.00
☒ Foundation \$8,562.00
☐ CMU (Block) Foundation \$0.00
☐ Concrete Flatwork \$0.00
☒ Window Wells \$348.00
☒ Damproofing \$1,358.00
☒ Utility Laterals \$1,345.00
☐ Septic System \$0.00
☐ Potable Water Well Allow \$0.00

☐ Select All

Buttons: Close, Insert, Save Selection, Recall Saved Selection

FIGURE 5.8 CUSTOMER BID PHASE-SELECTION FORM

Your company information can be entered on the form and the customer information is linked to the Cost Breakdown Summary sheet and if already entered on the Summary sheet will automatically display on the bid form. Contractor and Payment notes can also be made on the bid form.

Change Order

By clicking the Change Order button, an additional column on the Cost Breakdown Summary sheet displays the total of any change orders that have been made for each phase. The Include Change Orders in Variance button (to the right of the Cost Breakdown Summary sheet) will add the amount of the change order to the estimated cost so that actual disbursements (or bank draws) will be subtracted from the sum of the two figures. See the section on Creating and Keeping Track of Change Orders in [Chapter 4](#).

Completed Phases

By clicking the Completed Phases button, an additional column is displayed just to the left of the phase descriptions. Because some values in the estimate are automatically calculated, this feature allows you to manually "check off" phases that are complete and have been checked for accuracy. By clicking on the space next to the phase description, a "..." is added next to the description of the completed phase.

Export Summary to Text File

To export a text file that contains the phase descriptions, estimate amounts, and change order amounts, click the Export Summary To Text File button. This is very useful when sending budget information to accounting software other than QuickBooks.

Export Summary to QuickBooks

This menu option allows you to export your Estimate Summary into your QuickBooks file. See [Chapter 8 QuickBooks Interface](#) for full details on using this feature.

Add Draws Button

The Cost Breakdown Summary Sheet allows you to see the total of the draws (disbursements). The Add Draws button will create more columns for keeping track of actual expenditures. You also can delete Draw columns. You can also keep track of estimates as a percentage of the total bid. This can be very useful when checking the accuracy of your estimates. To see the percentages of the estimated amounts, click the Show % of Total button.

Goto SelectSubs Button

You may want to keep track of trade contractors or suppliers that will be used for a specific job. You can quickly select tradecontractors and suppliers for each job by clicking the GoTo Sheet menu item on the **EstimatorPRO Navigation** toolbar and selecting SubSelect from the list of detail sheets.

1. To change a trade contractor or supplier for the project, select the work type (i.e. Lumber) and click the bar to the left (see Figure 5.9).
2. Select the trade contractor or supplier by double clicking the name. The cursor will automatically move down to the next supplier or tradecontractor selection.

You may close the window or move to another work type by clicking on the up or down arrows on the Choose Sub/Supplier window.

	A	B	C	D	E	F	G	H	I									
1		Reset Page	<h1>Subcontractor & Supplier Selections 5</h1> <p>Select a Work Type then click on the grey bar to select a new subcontractor or supplier</p> <table border="1"> <thead> <tr> <th>Work Type</th> <th>Company</th> <th>Contact</th> <th>Office #</th> <th>Mobile #</th> <th>Fax #</th> <th>E-mail</th> <th>Work</th> </tr> </thead> </table>								Work Type	Company	Contact	Office #	Mobile #	Fax #	E-mail	Work
Work Type	Company	Contact									Office #	Mobile #	Fax #	E-mail	Work			
2	S E L E C T - W O R K T Y P E	Finance Company																
3		Earthwork																
4		Superintendent																
5		Steel																
6		Power																
7		Ftgs/Fdn																
8		Concrete																
9		Gas																
10		Window Wells																
11		Window Well Labor																
12	Dampproofing																	
13	Trusses																	
14	Termite																	
15	VA/FHA Inspector																	
16	Lumber	Patton Hardware Supplies	Cam Patton			415-555-1371	Lumber											
17	Exterior Doors																	

FIGURE 5.9 SELECTING A TRADE CONTRACTOR OR SUPPLIER FOR THE PROJECT

CHAPTER 6 Detail Sheets

Figure 6.1 shows a typical detail sheet. The detail sheet is where items are selected for take-off, and quantities are entered and costs are extended. You may choose the method of estimating—either lump sum bid (or allowance) or you may choose the detailed estimating method. The method you choose will copy the corresponding estimated cost to the Summary sheet.

To do a lump sum estimate:

1. Click on the green box and enter your amount. The total will appear in the cell to the right. If you return to the Summary Sheet, you will see that cost.

To do a detailed estimate:

1. Click the Click Here button next to Add Item. A window called **Material DB** will pop up. It contains a list of items in the database (see Figure 6.1) specific to the open detail sheet (in this case, the Garage Door database is open). You may select any or all of the items on the list.
2. With the **Material DB** form open (Figure 6.2), items from the database may be added to the detail sheet or inserted between items that have already been entered into the detail sheet.

The items will be brought into the detail sheet along with quantities and unit prices, either of which may be changed directly on the detail sheet. The quantities are either default values on the database or are formulas that calculate the quantities based on take-off values that you have entered either in the Key Information sheet, in the active detail sheet, or in another detail sheet.

Garage Door Detail					
Choose Estimating Method		Total Garage Door Costs:			
<input type="radio"/> Lump Sum	Enter Amount:		\$	1,305.60	
<input checked="" type="radio"/> Garage Door Detail			\$	1,305.60	
Garage Door		Choose Supplier		Supplier 2	
Add Item	Click Here	QTY	Unit	\$/Unit	Sub-Total \$
18 x 7		1	EA	\$ 810.00	\$ 810.00
3/4 HP Opener		1	EA	\$ 418.80	\$ 418.80
End					
Labor Sub-Total:				\$	-
Material Sub-Total:				\$	1,228.80
Sales Tax: <input checked="" type="checkbox"/>				\$	76.80
Total Cost:				\$	1,305.60

FIGURE 6.1 GARAGE DOOR DETAIL SHEET

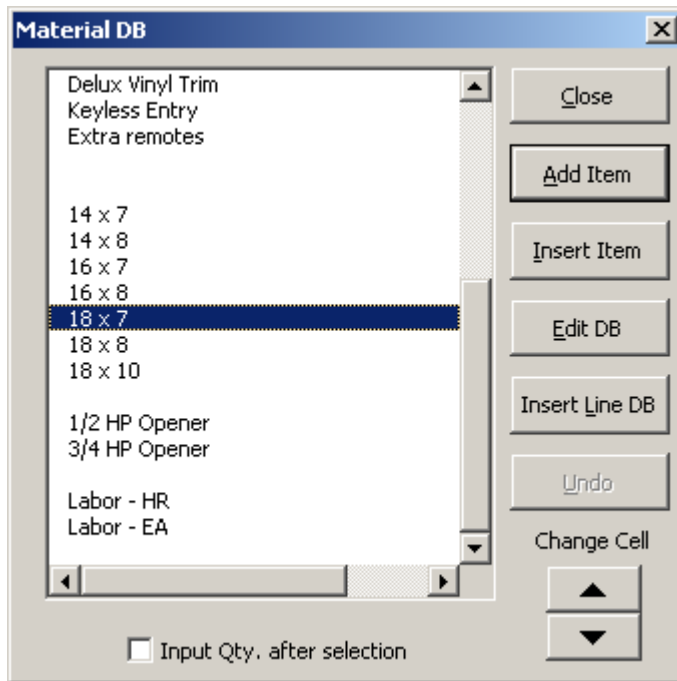


FIGURE 6.2 ADD ITEMS TO ESTIMATE/MATERIAL DB

Material Database Window Buttons

Edit DB Button: displays the database for editing.

Insert Line DB Button: Lets you add an item in the database. The line is inserted immediately above the item you select in the "Material DB" window.

Undo Button: You may undo an entry that was made by mistake by clicking the Undo button. There is also a checkbox that, when checked, allows you to enter the quantities as you select the items you want in the estimate.

Labor may be added as a line item in the detailed materials list and for most sheets, the labor can be calculated for individual items as either dollar costs per unit or man-hour costs per unit (see Figure 6.3). For the detailed materials list, labor can be entered as labor per hour, labor per SF or LF. You may choose the lump sum line item, the line item unit cost, or both.

Sales tax may be added to the material costs by checking the tax box. Sales tax will not be calculated for labor (item descriptions that begin with labor are added to the Labor Subtotal and are not taxed).

Windows Detail									
Choose Estimating Method		Total Cost for Windows:							
<input type="radio"/> Lump Sum		Enter Amount:		\$ 1,039.70					
<input checked="" type="radio"/> Select Window Detail				\$ 1,039.70					
Type of Window		Choose Supplier							
		Supplier 2							
Add Item	Click Here	QTY	Unit	SF	Width	\$/Unit	Sub-Total \$	Labor Rate	Total Labor
3030	1	EA	9	3		\$ 92.02	\$ 92.02	0.25	\$ 8.44
4040	4	EA	16	4		\$ 122.92	\$ 491.67	0.25	\$ 33.75
5040	2	EA	20	5		\$ 135.75	\$ 271.51	0.25	\$ 16.88
Labor - HR	3	HR	0	0		\$ 24.00	\$ 72.00	0	\$ -
End				45	12				
Total Number of Windows: 7								Labor: \$	59.06
						Labor Sub-Total:	\$ 131.06		
						Material Sub-Total:	\$ 855.19		
						Sales Tax: <input checked="" type="checkbox"/>	\$ 53.45		
						Total Cost:	\$ 1,039.70		

☐ Include Labor \$/Unit
☒ Use ManHours

FIGURE 6.3 WINDOWS DETAIL

Specialized Detail Sheets

Many of the Detail Sheets in Estimator*PRO* follow the same basic rules. There are, however, a few Detail sheets that have specific functions, such as the Concrete Detail sheet, Framing Detail sheet, and Foundation Detail Sheet.

Concrete Detail Sheet

PSI / Bag Mix (Sack Mix): Bag mix or Sack mix refers to the strength of concrete. It designates the number of bags or sacks of cement used per cubic yard of concrete (i.e., 5 Bag mix specifies 5 bags of concrete per CY).

The conversion of Bag Mix to PSI is roughly:

Bag Mix	PSI
5	2500
5.5	3000
6	3500
6.5	4000
7	4500

If you prefer to designate concrete strength by using PSI instead of bag mix or sack mix, go to the **Concrete Database** sheet (ConcreteDB) and type in the psi ratings in place of the bags per CY (Bag Mix). Reselect the preferred strengths for the footing and foundation concrete (on the FootingsDB and on the bottom of the Foundation Detail sheet).

Footing and Foundation Detail Sheets

The Footing and Foundation Detail sheets are similar to each other but are a bit different than many of the other detail sheets in the workbook. There are multiple sections that combine to establish the total bid price. As with other detailed sheets, the Footing and Foundation Detail sheets allow you to choose whether or not to use a lump sum amount for the estimate or to use detailed estimating (Figure 6.4). The Footing and Foundation detail sheets also have sections to input the specifications for a particular job, such as rebar spacing and waste factor.

There are two levels of detail for estimating these two phases. Since both are very similar, let's look specifically at the Foundation estimate. The first level of detail is based on cost per LF of foundation. For this example:

1. Click Add Item next to **Foundation** and choose the wall heights and thicknesses.
2. Enter the LF of wall for each type of wall.
3. Choose the tradecontractor who will be performing the work.

The cost for this method of estimating typically includes labor for forming and placing the concrete, the concrete itself, steel, and other miscellaneous items. In this case, the tradecontractor charges \$15.15 per LF for 4-foot foundation walls and \$23.95 per LF for 8-foot foundation walls. The estimate for this phase is complete.

Foundation Detail

Choose Estimating Method:

☐ Lump Sum
 ☒ Detail Estimate

Total Costs:

Enter Amount:

\$ 5,996.20

Please Provide the Following:

Vertical Rebar Spacing	24 "
Horizontal Rebar Spacing	24 "
Foundation J-bolt Spacing	30 "
Material Waste Factor	5%

Detail Estimate

Foundation	Add Item	Choose Sub	Atlas FDNs
Description	QTY	Unit	\$/Unit
4' Foundation Wall (8"Thick)	48	LF	4.98
8' Foundation Wall (8"Thick)	220	LF	45.63
End		Total CY: 50.75	
Total LF of Foundation: 268		<input type="checkbox"/> Subtract Window Openings from CY Sales Tax: <input type="checkbox"/> Total Cost: \$ 5,996.20	

Misc.	Add Item	Choose Supplier	Supplier 3
Description	QTY	Unit	\$/Unit
End		Total CY: 0.00	
Labor Sub-Total:		\$ -	
Material Sub-Total:		\$ -	
Sales Tax: <input checked="" type="checkbox"/>		\$ -	
Total Cost:		\$ -	

Material DB

Items

4' Foundation Wall (8"Thick)

4' Foundation Wall (9"Thick)

4' Foundation Wall (10"Thick)

4' Foundation Wall (12"Thick)

6' Foundation Wall (8"Thick)

6' Foundation Wall (9"Thick)

6' Foundation Wall (10"Thick)

6' Foundation Wall (12"Thick)

8' Foundation Wall (8"Thick)

8' Foundation Wall (9"Thick)

8' Foundation Wall (10"Thick)

8' Foundation Wall (12"Thick)

9' Foundation Wall (8"Thick)

Close

Add Item

Insert Item

Edit DB

Insert Line DB

Undo

Clear Line

Change Cell

☐ Input Qty
 ☒ Overwrite Qty

FIGURE 6.4 TOTAL ESTIMATE PRICE BASED ON LF OF FOUNDATION

The second level of detail involves using a trade contractor for forming and placing the concrete, but the rebar, miscellaneous items, and the concrete are calculated separately. Following the example shown in Figure 6.5, after selecting the type of foundations and entering the LF quantities, choose the trade contractor who will be forming and placing the concrete for the foundations (labor prices only). In the Miscellaneous section, select other items, such as steel, step-ups, door and window bucks. Enter their quantities and select a pricing structure based on the selection of a specific supplier or tradecontractor.

NOTE: Most of the quantities in the Miscellaneous section are automatically calculated based on the LF of foundation that you entered in the first section.

The last section is for adding the concrete costs. The quantity of concrete is automatically calculated based on the volume of the walls and subtracting for door and window openings (Figure 6.6).

NOTE: Window opening volumes are automatically calculated when basement windows are selected when choosing the window wells. These volumes are then subtracted from the total concrete volume.

Various factors affect the final cost per CY of concrete. Factors that affect the cost are the supplier from whom the concrete is purchased, additives, such as calcium and hot water, and the strength rating of the concrete. In our example we have used PSI to differentiate concrete strength. Some contractors prefer to use the term "sack mix" or "bag mix".

NOTE: You may change the label designations as you wish by unlocking the page (click on the Red key on the **EstimatorPRO Utilities** toolbar) and by making the desired changes. To make these changes permanent, save them over the **EstimatorPro.xlt** template file (See Making Permanent Changes in Chapter 4).

Be sure to check the Include Concrete Cost in Total Price box in the concrete section to have the concrete costs added to the total bid price.

Foundation		Add Item		Choose Sub		Sub 1	
Description	QTY	Unit	CY	\$/Unit	Sub-Total \$		
4' Foundation Wall (8" Thick)	48	LF	4.98	\$ 4.50	\$ 216.00		
8' Foundation Wall (8" Thick)	220	LF	45.63	\$ 6.50	\$ 1,430.00		
End			Total CY: 50.75	<input type="checkbox"/> Subtract Window Openings from CY			
Total LF of Foundation: 268			Sales Tax: <input checked="" type="checkbox"/>	\$ 102.88			
			Total Cost:	\$ 1,748.88			

Misc.		Add Item		Choose Supplier		Supplier 3	
Description	QTY	Unit	CY	\$/Unit	Sub-Total \$		
1/2" x 10" J-Bolts & Washers	151	EA	0.00	\$ 0.57	\$ 86.07		
HPAHD 22 Holdown	5	EA	0.00	\$ 13.23	\$ 66.15		
FDN Steps	2	EA	0.00	\$ 11.03	\$ 22.06		
Blockouts	1	EA	-0.10	\$ 16.54	\$ 16.54		
Door Buck Rental	1	EA	-0.50	\$ 47.94	\$ 47.94		
Door Buck Labor Install	1	EA	0.00	\$ 55.13	\$ 55.13		
Window Buck Area	81	SF	-2.00	\$ 1.50	\$ 121.50		
Window Buck Rental	5	EA	0.00	\$ 22.05	\$ 110.25		
Window Buck Labor Install	5	EA	0.00	\$ 22.05	\$ 110.25		
Beam Pockets	2	EA	0.00	\$ 16.54	\$ 33.08		
-----Rebar-----	59	0	0.00	\$ -	\$ -		
20'	59	EA	0.00	\$ 4.65	\$ 274.35		
3' 6"	27	EA	0.00	\$ 1.02	\$ 27.41		
7' 8"	117	EA	0.00	\$ 2.23	\$ 260.49		
End			Total CY: -2.50				
				Labor Sub-Total:	\$ -		
				Material Sub-Total:	\$ 1,231.21		
				Sales Tax: <input checked="" type="checkbox"/>	\$ 76.95		
				Total Cost:	\$ 1,308.16		

Concrete		Choose PSI		<input checked="" type="checkbox"/> Include Concrete Cost in Total Price	
Description	QTY	Unit	PSI	\$/CY	Total
Concrete	48.25	CY	2500	\$ 58.00	\$ 2,798.50
<input type="checkbox"/> Add Calcium to Concrete 0.01				Sales Tax: <input checked="" type="checkbox"/>	\$ 174.91
<input type="checkbox"/> Add Hot Water to Concrete				Total:	\$ 2,973.41

Show Rebar Detail

Material DB

Items

-----Rebar-----

20'
1' 6"
3' 6"
4' 6"
5' 0"
5' 8"
6' 8"
7' 8"
8' 0"
8' 8"
9' 8"
10' 0"
11' 8"
13' 8"
...

Close
Add Item
Insert Item
Edit DB
Insert Line DB
Undo
Clear Line
Change Cell

☐ Input Qty
☒ Overwrite Qty

FIGURE 6.5 TOTAL ESTIMATE PRICE BASED ON DETAILED TAKE-OFF

By completing the Window Well Detail phase before the Foundation detail sheet, quantities of window bucks and areas of windows will automatically be used for calculations on the Foundation Detail sheet. Note that the window wells are ordered one foot deeper than the window itself. For example, order a 4050-36 window well for a 4040 opening where egress is required.

Window Well Detail						
Choose Estimating Method:					Total Costs:	
<input type="radio"/> Lump Sum		Enter Amount:			\$ 743.75	
<input checked="" type="radio"/> Detail Estimate					\$ 743.75	
Window Wells		Add Item		Choose Supplier		Supplier 1
Description	QTY	Unit	SF	Total Area	\$/Unit	Sub-Total \$
Corrugated Steel 4050-36	3	EA	16	48	\$ 140.00	\$ 420.00
Corrugated Steel 5040-36	1	EA	15	15	\$ 145.00	\$ 145.00
Corrugated Steel 6040	1	EA	18	18	\$ 135.00	\$ 135.00
End		Total Window Area:		81		
Total # of Window Wells:		5		Labor Sub-Total:		\$ -
				Material Sub-Total:		\$ 700.00
				Sales Tax: <input checked="" type="checkbox"/>		\$ 43.75
				Total Cost:		\$ 743.75

FIGURE 6.6 WINDOW WELL DETAIL SHEET

Framing Detail Sheet

Framing Calculator: The Framing Detail sheet utilizes the Specialty Lumber Calculator to calculate the framing materials needed for your project. For detailed instruction on how to use the Specialty Calculator, see [Chapter 9, Specialty Calculators](#).

CHAPTER 7 Database Utilities

Estimator*PRO* lets you customize the database with your own information. The databases associated with the Detail sheets can be managed through the **Estimator*PRO* Database Utilities** toolbar.

Database Utilities Toolbar

There are four Database menu items (Figure 7.1) that you can use to keep your database up-to-date.

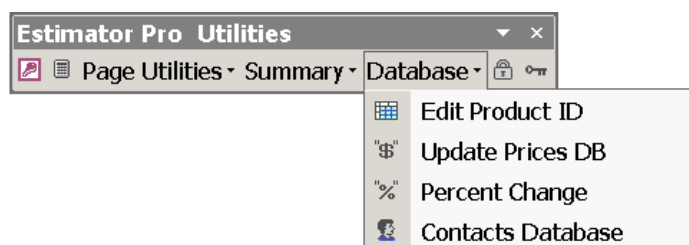


FIGURE 7.1 DATABASE MENU

Edit Product ID

Many suppliers have product identification codes for each one of the items they sell. The **Edit Product ID** menu item (Figure 7.2) will help you to enter these ID codes into the database. ID codes can be typed in or copied and pasted from another data sheet. Once the Close button is clicked, a comment is placed in the appropriate supplier's unit cost. The product ID and the modification date is displayed in the comment field.

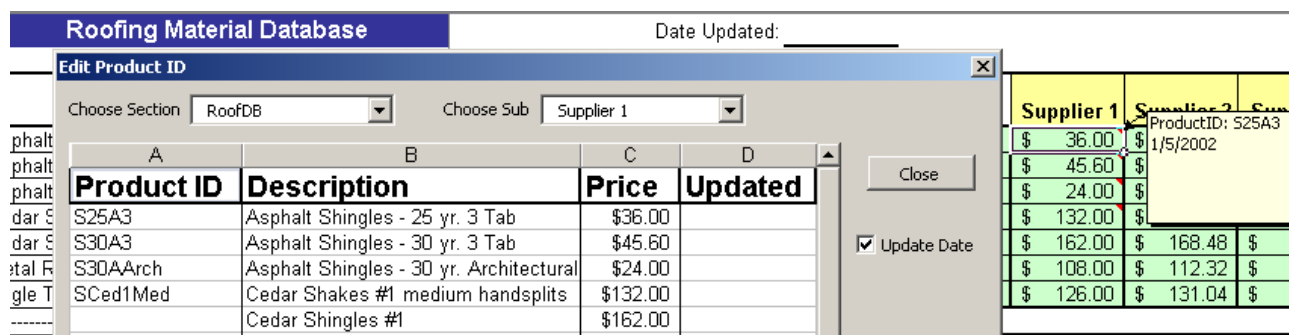


FIGURE 7.2 EDIT PRODUCT ID

Update Prices DB

This new feature to Estimator*PRO* 5.0 is a powerful tool to help you keep on top of pricing changes. This feature takes most of the work out of updating your prices. It allows suppliers to send updated prices by email or through the Internet. By following the four steps in the Update Wizard, prices will be updated in just a minute throughout your database. This saves hours of your time in manually updating prices and saves suppliers time preparing price lists and faxing them to you.

1. From the Estimator*PRO* database, click the **Update Prices DB** menu item. A wizard is displayed (Figure 7.3), which walks you through the update process.
2. The first window asks for the file that the data will be extracted from. Browse to the file and click Next.

NOTE: The file can be an Excel file or a text file. It is a file that your supplier sends to you by email, through the Internet, or on disk. Your suppliers should be able to export files from their databases, which contain product IDs, item descriptions, units, and unit costs. These fields do not have to be in the order just described.

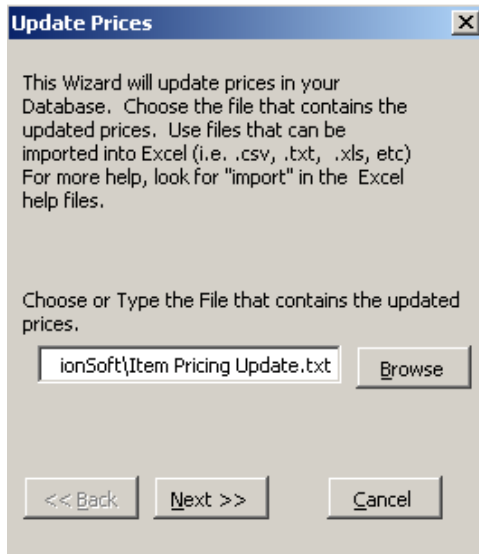


FIGURE 7.3 UPDATE DATABASE PRICES WIZARD.

3. The wizard opens the file containing the updated pricing information (Figure 7.4). Verify that the range of items to update is correct. (If extraneous information is on the file, it can be left out of the selection.) Click Next.

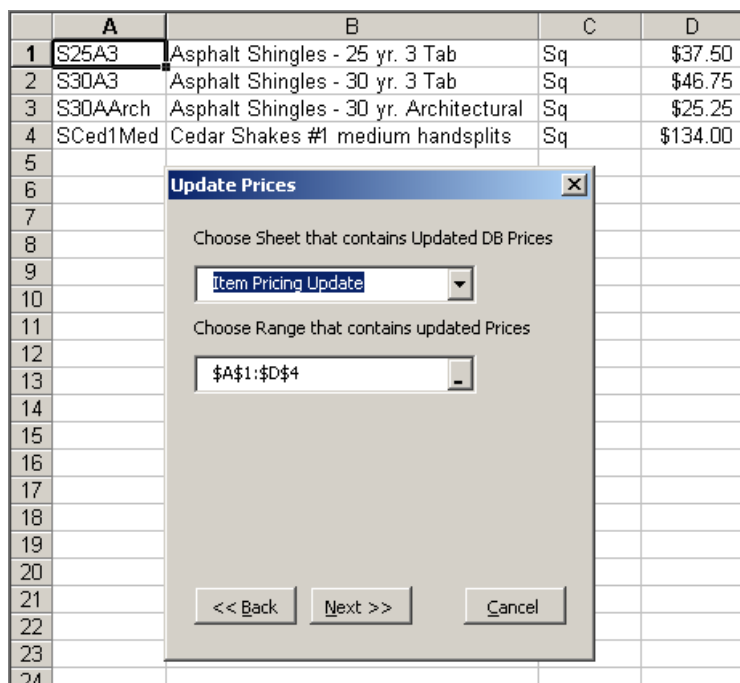


FIGURE 7.4 VERIFY RANGE OF ITEMS TO UPDATE.

4. Next, check the columns to verify that the location of the product ID, the unit cost, etc., are identified correctly. Click Next. (Figure 7.5)

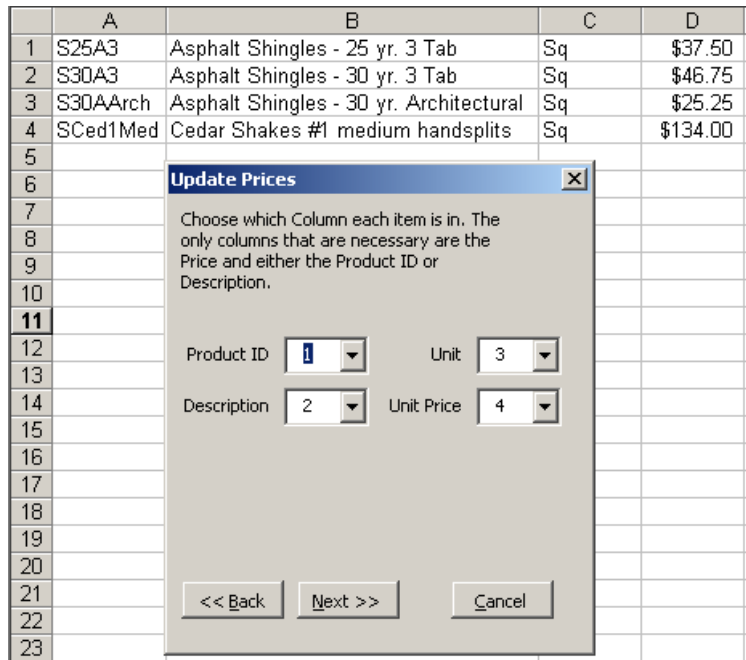


FIGURE 7.5 VERIFY LOCATION OF INFORMATION.

You can choose to update all databases, only one database, or selected databases (Figure 7.6). You can choose to update items based on matching item descriptions or by matching product identification codes. Also, you must choose which supplier's prices to update.

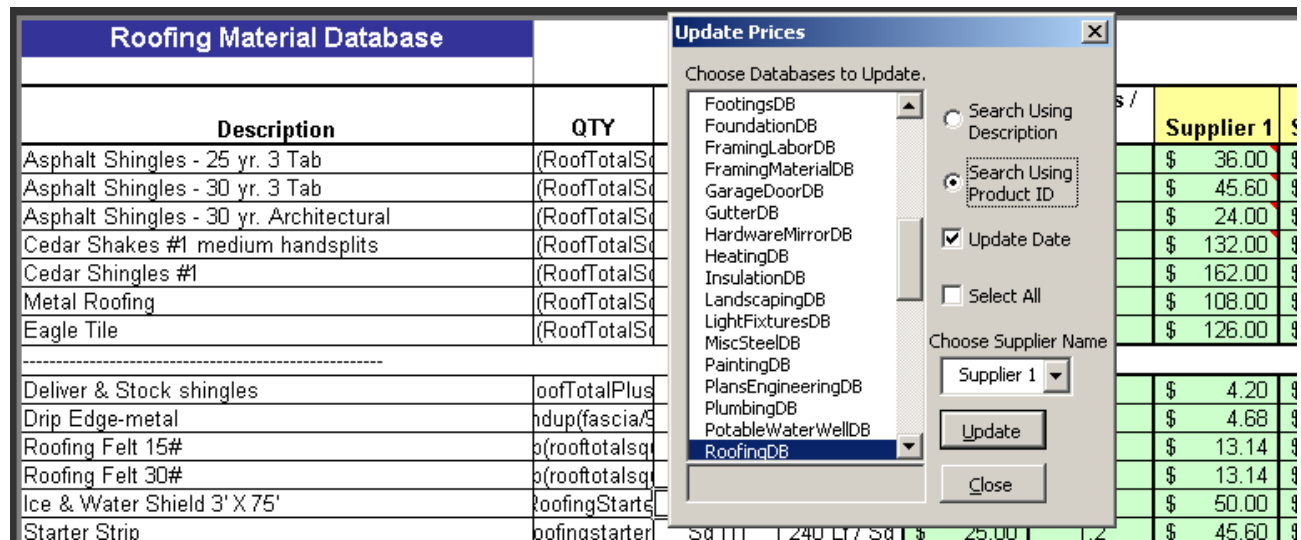


FIGURE 7.6 CHOOSE WHICH DATABASES AND SUPPLIER'S PRICES TO UPDATE.

Percent Change Button

The Percent Change button will typically be used with the database sheets. It will change the values of selected cells by whatever percentage (positive or negative) that you choose (Figure 7.7). The precision for rounding can be selected from a dropdown list.

1. To enter the percentage of change, either type the value directly into the **Percent Change** Edit box or click the up arrow to increase the percentage and the down arrow to decrease the percentage. If values are changed by mistake, the undo button will undo the change.

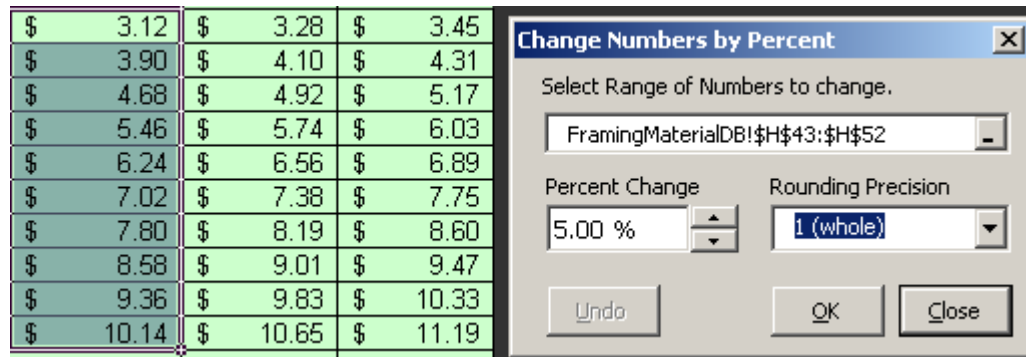


FIGURE 7.7 CHANGING THE VALUE OF CELLS BY A PERCENTAGE

Contacts Database

The Contacts database is where information on customers, suppliers, tradecontractors, employees, and etc. can be stored (Figure 7.8). The information in the Contacts database is used in creating purchase orders-specifically the Ship To address and the supplier or tradecontractor information.

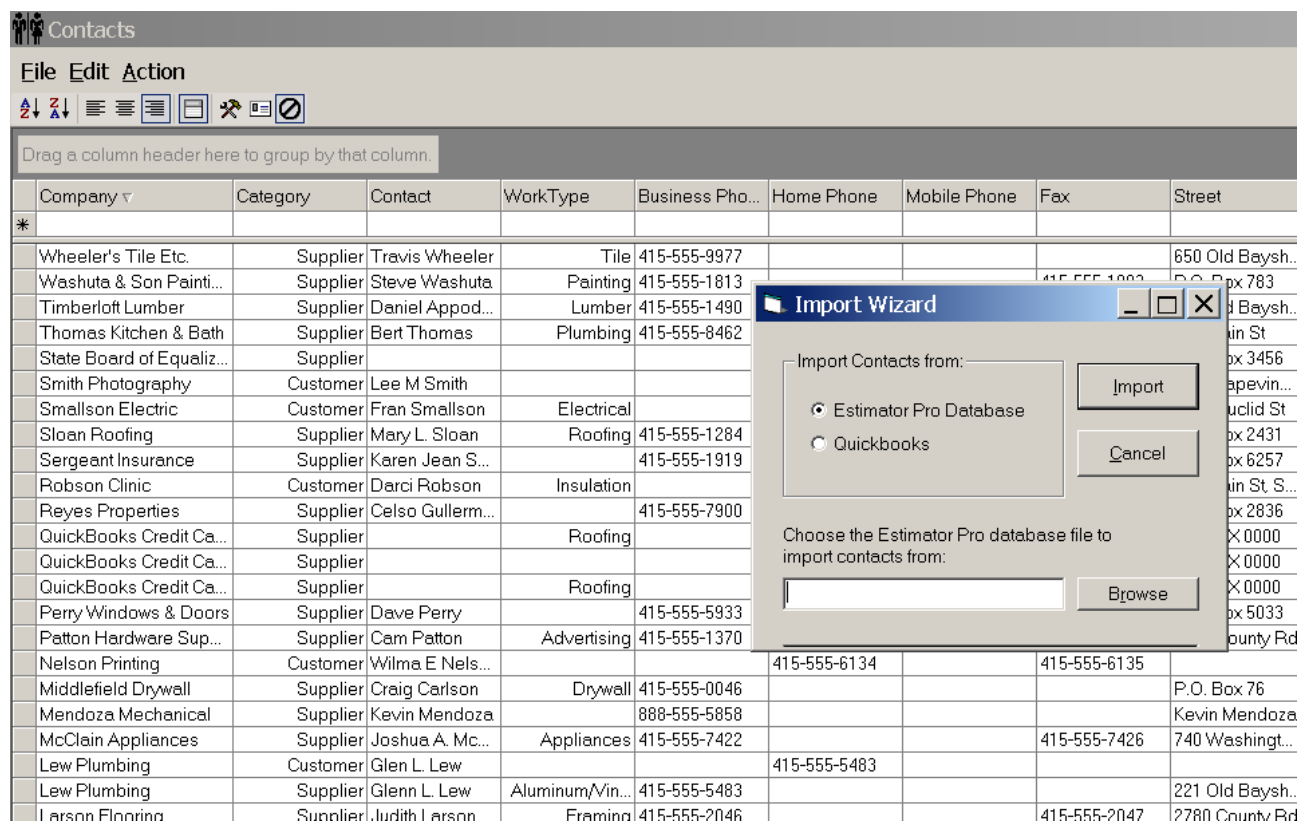


FIGURE 7.8 CONTACTS DATABASE

Protecting Your Database

For your protection against accidentally erasing formulas and other valuable information on your worksheets, the worksheets are protected by default. You cannot edit or enter information into locked cells of a protected worksheet.

If you have to unprotect a sheet to make changes, unprotect the sheet by clicking the Unprotect button (black key on toolbar) and then make the change. You can make changes to values, column, or row sizes, formats, formulas, and etc. After making any changes, it is recommended that you protect the sheet again by clicking the lock on the toolbar. This will help you from accidentally writing over a formula or other text by mistake.

CHAPTER 8 QuickBooks Interface

EstimatorPRO 5.0 makes it possible for you to export EstimatorPRO Purchase Orders and Estimates directly to QuickBooks.

> DEMO

Export Summary to QuickBooks

To begin, you must have QuickBooks open to a product-based business. Also, you need to have entered the Project Name and the Customer Name on the **Project Information** sheet. If you have not completed these steps, EstimatorPRO will prompt you to do so.

1. Click the Export Summary to QB button. Your estimate will automatically be sent to QuickBooks.

EstimatorPRO will export only the information that has an amount listed in the estimate. Look at the sample estimate (Figure 8.1). (Some of the construction phases have been hidden for presentation purposes.)

Total Sales Price:		\$ 26,484.87	Add Draw		Delete Draw	
Code	Project Overhead & Lot	Est. Cost or Bid	Draw 1	Draw 2	Draw 3	Variance
1000	Lot	\$ -				\$ -
	Permit and Fees	\$ 6,557.00				\$ 6,557.00
	Architecture & Engineering	\$ -				\$ -
	Temporary Utilities	\$ 870.00				\$ 870.00
	Construction Loan	\$ -				\$ -
	Supervision	\$ 381.38				\$ 381.38
	Contingency	\$ 508.51				\$ 508.51
	Real Estate Commission	\$ 1,059.39				\$ 1,059.39
	Subtotal - Project OH & Lot	\$ 9,376.29	\$ -	\$ -	\$ -	\$ 9,376.29
Code	Hard Costs	Est. Cost or Bid	Draw 1	Draw 2	Draw 3	Variance
	Demolition	\$ 800.00				\$ 800.00
	Earthwork	\$ 1,890.00				\$ 1,890.00
	Footings	\$ 1,821.00				\$ 1,821.00
	Foundation	\$ 5,634.00				\$ 5,634.00
	CMU Foundation	\$ -				\$ -
	Foundation	\$ 2,387.00				\$ 2,387.00
	Landscaping	\$ -				\$ -
	Subtotal of Hard Costs:	\$ 12,532.00	\$ -	\$ -	\$ -	\$ 12,532.00
	Tot. Hard Costs & Proj. OH	\$ 21,908.29	\$ -	\$ -	\$ -	\$ 21,908.29
	Company Overhead (G&A)	\$ 2,034.04				\$ 2,034.04
	Builder's Margin	\$ 2,542.55				\$ 2,542.55
	Total Sales Price:	\$ 26,484.87				\$ 26,484.87

FIGURE 8.1 SAMPLE ESTIMATOR PRO SUMMARY SHEET

When you click Send Estimate to QB, Estimator*PRO* provides a screen with the phase descriptions and the estimated amounts (Figure 8.2). You are able to choose which records to send to QuickBooks (unchecked items are not sent). QuickBooks Item Accounts can be assigned individually or all items may be assigned at one time to the same account.

Once a QuickBooks item account has been assigned, Estimator*PRO* remembers it and will use that account by default the next time an estimate is sent. The customer job and address, the date, estimate number, quantity, and unit cost may all be modified on this form.

Exporting Estimate to QuickBooks

Quickbooks Customer: Job
 Smallson, Fran

Estimate

Name/Address	Date	Estimate #
Smallson Electric 5437 Euclid St Bayshore, CA 94326	7/22/2003	EP31391

	QB Item	Description	Qty	Cost	Amount
<input checked="" type="checkbox"/>	Permit	Permit and Fees	1	\$6,557.00	\$6,557.00
<input checked="" type="checkbox"/>	Materials	Temporary Utilities	1	\$870.00	\$870.00
<input checked="" type="checkbox"/>	Supervision	Supervision	1	\$381.38	\$381.38
<input checked="" type="checkbox"/>	Contingency	Contingency	1	\$508.51	\$508.51
<input checked="" type="checkbox"/>	Real Estate Commi	Real Estate Commission	1	\$1,059.39	\$1,059.39
<input checked="" type="checkbox"/>	Removal	Demolition	1	\$800.00	\$800.00
<input checked="" type="checkbox"/>	Materials	Earthwork	1	\$1,890.00	\$1,890.00
<input checked="" type="checkbox"/>	Materials	Footings	1	\$1,821.00	\$1,821.00
<input checked="" type="checkbox"/>	Materials	Foundation	1	\$5,634.00	\$5,634.00
<input checked="" type="checkbox"/>	Concrete Slab	Flatwork	1	\$2,387.00	\$2,387.00
<input checked="" type="checkbox"/>	Company Overhead	Company Overhead (G&A)	1	\$2,034.04	\$2,034.04
<input checked="" type="checkbox"/>	Builder's Margin	Builder's Margin	1	\$2,542.55	\$2,542.55

Assign QB Item to all descriptions above: Materials

Export Cancel

FIGURE 8.2 ESTIMATING EXPORT FORM

If a QuickBooks account does not exist, a new account can be created by clicking the down arrow next to Assign QB Item to all descriptions above and then clicking Add New. A user form for new account information is then displayed (see Figure 8.3).

Add Item to Quickbooks

Item Type
☒ Service ☐ Inventory ☐ Non-Inventory

Item Name/Number Subitem of

☐ This service is performed by a subcontractor, owner, or partner

Description Rate Tax Code

Account

OK Cancel

FIGURE 8.3 ADDING NEW ACCOUNTS TO QUICKBOOKS

Click the Export button when all of the items are as you want them to be. As the estimate is successfully transferred to QuickBooks, an information box lets you know and reminds you of the estimate number so that you can find the estimate in QuickBooks (Figure 8.4).

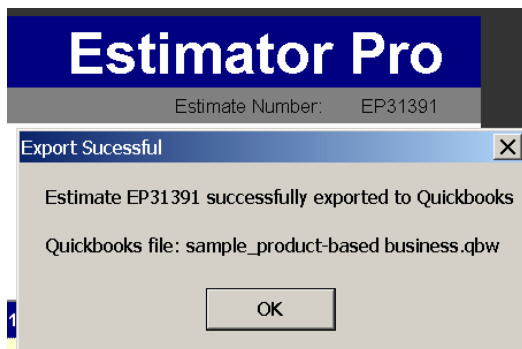


FIGURE 8.4 ESTIMATE EXPORTED SUCCESSFULLY

To get to the estimate in QuickBooks, click on the **Customers** menu and select Estimates from the Customer Navigator (Figure 8.5).

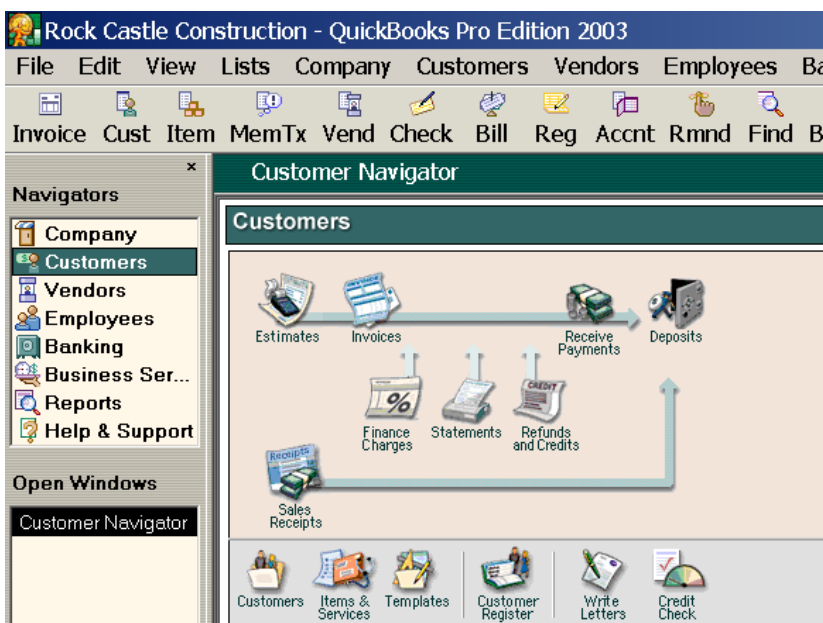


FIGURE 8.5 CHOOSE ESTIMATES FROM THE QUICKBOOKS CUSTOMERS MENU

Click Find to see the Find Estimates pop-up help box (Figure 8.6). Enter the estimate number; it may be easier to copy and paste it from EstimatorPRO than to try and remember the number.

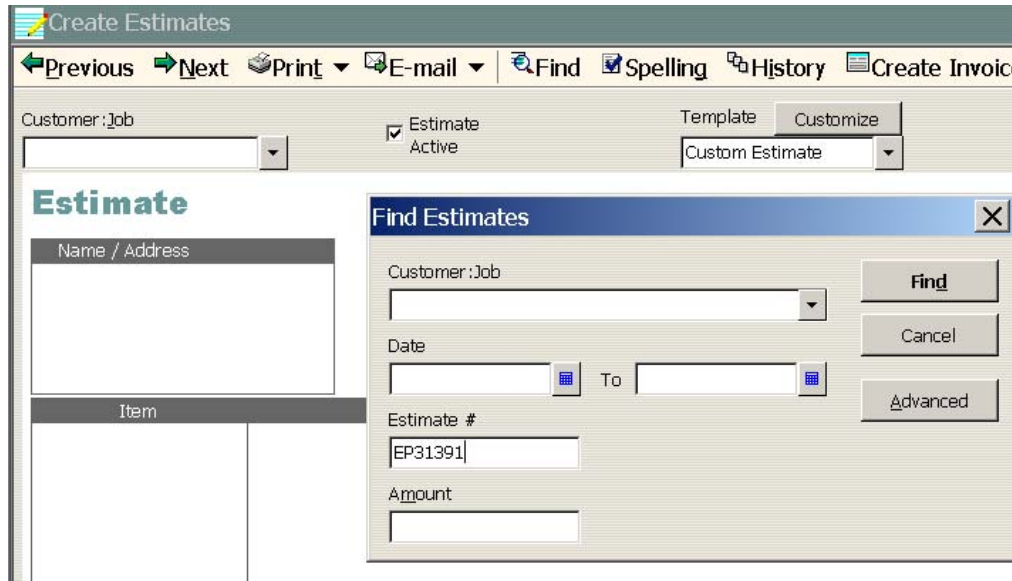


FIGURE 8.6 CHOOSE ESTIMATES FROM THE QUICKBOOKS CUSTOMERS MENU

The full estimate is shown in QuickBooks (Figure 8.7).

Create Estimates

Ask a help questionAskHow Do I?

PreviousNextPrintE-mailFindSpellingHistoryCreate Invoice

Customer: Job

Smallson, Fran

Create Estimate

Estimate Active

Template

Customize

Custom Estimate

Estimate

Date

07/22/2003

Estimate #

EP31391

Name / Address

Smallson Electric
5437 Euclid St
Bayshore, CA 94326

Item	Description	Qty	Cost	Amount	Markup	Total	Tax
Permit	Permit and Fees	1	6,557.00	6,557.00		6,557.00	Non
Materials	Temporary Utilities	1	870.00	870.00		870.00	Non
Supervision	Supervision	1	381.3822	381.38		381.38	Non
Contingency	Contingency	1	508.5096	508.51		508.51	Non
Real Estate Commission	Real Estate Commission	1	1,059.3949	1,059.39		1,059.39	Non
Removal	Demolition	1	800.00	800.00		800.00	Non
Materials	Earthwork	1	1,890.00	1,890.00		1,890.00	Non
Materials	Footings	1	1,821.00	1,821.00		1,821.00	Non
Materials	Foundation	1	5,634.00	5,634.00		5,634.00	Non
Concrete Slab	Flatwork	1	2,387.00	2,387.00		2,387.00	Non
Company Overhead (G...	Company Overhead (G&A)	1	2,034.0382	2,034.04		2,034.04	Non
Builder's Margin	Builder's Margin	1	2,542.5478	2,542.55		2,542.55	Non

FIGURE 8.7 QUICKBOOKS ESTIMATE WITH DATA SENT FROM ESTIMATORPRO.

Exporting Purchase Orders to QuickBooks

8

► DEMO

If you want to export a purchase order that has been created in Estimator*PRO* to QuickBooks, click the Send PO to QuickBooks button (Figure 8.8).

Insert Your
Company
Logo
Here

Company Name
Address
City, State ZIP
Phone

Purchase Order No. **1**

PURCHASE ORDER

Supplier / Trade Contractor
Name: East Bayshore Tool & Supply
Attn: Eric Hansen
Address: 5111 N. Grand Ave
City: E. Bayshore
State: CA Zip Code: 92781
Tax ID:

Ship To
Name:
Attn: Bryan Ruff
Address: 4308 Sonoma Dr.
City: E. Bayshore
State: CA Zip Code: 92781

Description	Qty	Units	Unit Cost	TOTAL
-----1st Level Floor -----	0	0	\$ -	\$ -
3-1/2"X40' Sill Sealer	7	RL	\$ 4.13	\$ 28.91
2 x 4 Treated .40	234	LF	\$ 0.44	\$ 102.96
1/2" Washers	118	EA	\$ 0.09	\$ 10.62
2 x 10 - 10	11	EA	\$ 11.81	\$ 129.91
2 x 10 - 12	19	EA	\$ 14.18	\$ 269.42
2 x 10 - 14	45	EA	\$ 15.68	\$ 705.60
2 x 10 - 16	31	EA	\$ 16.75	\$ 519.25
4 x 8 - 3/4" OSB T&G	71	EA	\$ 10.03	\$ 712.13
Construction Adhesive 29oz	18	EA	\$ 5.23	\$ 94.14
Sub-Total			\$	2,572.94
Shipping & Handling				
Tax			\$	160.81
Total			\$	2,733.75

Date: 24-Jul-03

Increment PO Number

Choose Supplier/Vendor

Choose Ship to Address

Save Purchase Order

Reset Items

Reset Page

Show Product ID

Send PO to Quickbooks

FIGURE 8.8 SAMPLE ESTIMATORPRO PURCHASE ORDER

You are presented with a pop-up box (Figure 8.9). Verify that the Vendor and Ship To information are correct. The QB Item is the QuickBooks account that you want to assign individual line items. All items can be assigned at one time by clicking the drop-down arrow next to the Assign QB Item to all descriptions above box. New QuickBooks Item accounts may be set up by clicking the Add New option from the drop-down list.

If individual items need to be changed, click on the QuickBooks item next to a description and a drop-down arrow will allow you to choose an account for that item. Estimator*PRO* remembers the assignments that have been made and will default to those QuickBooks Item accounts the next time a purchase order is created.

You can also choose which items to send to QuickBooks by checking the boxes to the left on each line. They default to the checked position and if you don't want an item sent to QuickBooks, uncheck the box by clicking on it.

Export Purchase Order to Quickbooks

Quickbooks Vendor: Quickbooks Ship To:

Purchase Order

Vendor		Ship To	Date	P.O. NO.
East Bayshore Tool & Supply 5111 N. Grand Ave E. Bayshore, CA 92781		Bryan Ruff 782 Skyline Dr East Bayshore, CA 94327	7/24/2003	1

QB Item	Description	Qty	Unit	Rate	Amount
<input checked="" type="checkbox"/>	1st Level Floor				
<input checked="" type="checkbox"/> Rough	3-1/2"x40' Sill Sealer	7	RL	\$4.13	\$28.91
<input checked="" type="checkbox"/> Rough	2 x 4 Treated .40	234	LF	\$0.44	\$102.96
<input checked="" type="checkbox"/> Rough	1/2" Washers	118	EA	\$0.09	\$10.62
<input checked="" type="checkbox"/> Rough	2 x 10 - 10	11	EA	\$11.81	\$129.91
<input checked="" type="checkbox"/> Rough	2 x 10 - 12	19	EA	\$14.18	\$269.42
<input checked="" type="checkbox"/> Rough	2 x 10 - 14	45	EA	\$15.68	\$705.60
<input checked="" type="checkbox"/> Rough	2 x 10 - 16	31	EA	\$16.75	\$519.25
<input checked="" type="checkbox"/> Rough	4 x 8 - 3/4" OSB T&G	71	EA	\$10.03	\$712.13
<input checked="" type="checkbox"/> Rough	Construction Adhesive 29oz	18	EA	\$5.23	\$94.14
<input type="checkbox"/>					
<input checked="" type="checkbox"/> Sales Tax	Sales Tax	1		\$160.81	\$160.81

Assign QB Item to all descriptions above:

FIGURE 8.9 EXPORT PURCHASE ORDERS TO QUICKBOOKS

When the purchase order export screen has been completed, click Export. If the export was successful, you will receive a feedback screen letting you know the purchase order number and the file it was sent to (Figure 8.10).

Export Successful

Purchase Order 1 successfully exported to Quickbooks

Quickbooks file: sample_product-based business.qbw

FIGURE 8.10 SUCCESSFUL COMPLETION OF PO EXPORT TO QUICKBOOKS

To locate the purchase order in QuickBooks, go to the **Vendor** menu and select Purchase Orders (Figure 8.11).

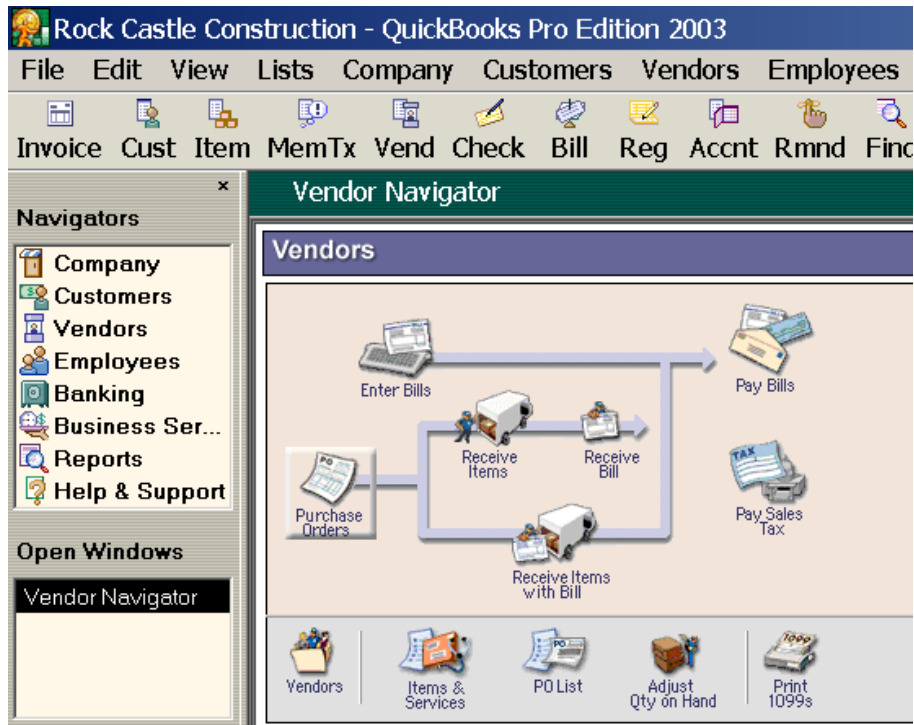


FIGURE 8.11 QUICKBOOKS VENDOR MENU

Click Find from the menu and enter the vendor and the purchase order number or other appropriate information (Figure 8.12). Click the Find button on the window.

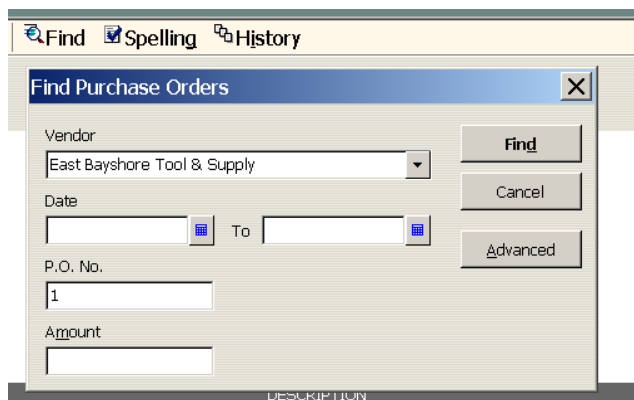


FIGURE 8.12 FINDING A PURCHASE ORDER IN QUICKBOOKS

The purchase order with all of its items will be displayed (Figure 8.13).

Create Purchase Orders

Ask a help question

Ask

How D

Previous

Next

Print

Find

Spelling

History

Vendor

Ship To

Template

Customize

East Bayshore Tool & Supply

Ruff, Bryan

Custom Purchase Or...

Purchase Order

Vendor

East Bayshore Tool & Supply

5111 N. Grand Ave

E. Bayshore, CA 92781

DATE

07/24/2003

SHIP TO

Bryan Ruff

782 Skyline Dr

East Bayshore, CA 9

Expected

07/24/2003

ITEM	DESCRIPTION	QTY	RATE	CUSTOMER	AMOUNT	Qty'd
	-----1st Level Floor -----		0.00		0.00	
Lumber:Rough	3-1/2"x40" Sill Sealer	7	4.13	Ruff, Bryan	28.91	0
Lumber:Rough	2 x 4 Treated .40	234	0.44	Ruff, Bryan	102.96	0
Lumber:Rough	1/2" Washers	118	0.09	Ruff, Bryan	10.62	0
Lumber:Rough	2 x 10 - 10	11	11.81	Ruff, Bryan	129.91	0
Lumber:Rough	2 x 10 - 12	19	14.18	Ruff, Bryan	269.42	0
Lumber:Rough	2 x 10 - 14	45	15.68	Ruff, Bryan	705.60	0
Lumber:Rough	2 x 10 - 16	31	16.75	Ruff, Bryan	519.25	0
Lumber:Rough	4 x 8 - 3/4" OSB T&G	71	10.03	Ruff, Bryan	712.13	0
Lumber:Rough	Construction Adhesive 29oz	18	5.23	Ruff, Bryan	94.14	0
			0.00		0.00	
Sales Tax	Sales Tax	1	160.8088	Ruff, Bryan	160.81	0

FIGURE 8.13 QUICKBOOKS PURCHASE ORDER WITH DATA SENT FROM ESTIMATORPRO.

Contacts Database

The Contacts database is where information on customers, suppliers, tradecontractors, employees, and etc. can be stored. See [Chapter 7, Database Utilities](#).

CHAPTER 9 Specialty Calculators

► DEMO

Pop-up Calculator

This button displays a calculator for adding, subtracting, multiplying, and dividing (see Figure 9.1). It also has buttons for calculating squares and square roots. The C button clears all entries and the CE button clears only the last entered value. By clicking the insert button, values in the display can be inserted into a worksheet cell or added to an existing quantity in a worksheet cell.

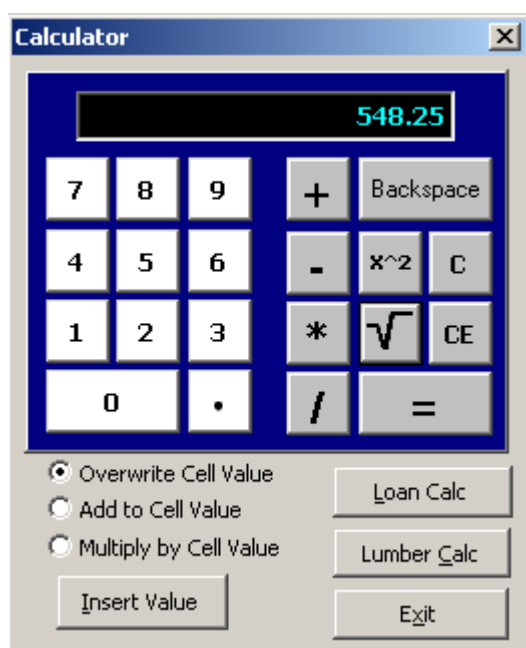


FIGURE 9.1 GENERAL PURPOSE CALCULATOR

Loan Calculator

The Loan Amortization Calculator (Figure 9.2) is activated by clicking the Loan button in the bottom right corner of the General Purpose Calculator. To find the loan payment (principle and interest):

1. Enter the amount of the loan, the down payment amount or percentage (if any), and the loan length in years.
2. Click the Calculate Loan Amortization button to display the amortization table for the loan.

The amortization table can be exported to a new worksheet:

1. Click the Export Table button.

The amortization table on the new worksheet is fully functional, that is, you can also change the values of the loan amount, interest rate, etc. on the new worksheet and the amortization table will be adjusted to reflect the changes.

Month	Interest	Principal	Balance
1	\$1,251.00	\$191.48	\$222,208.52
2	\$1,249.92	\$192.56	\$222,015.96
3	\$1,248.84	\$193.64	\$221,822.32
4	\$1,247.75	\$194.73	\$221,627.58
5	\$1,246.66	\$195.83	\$221,431.76
6	\$1,245.55	\$196.93	\$221,234.83
7	\$1,244.45	\$198.04	\$221,036.79
8	\$1,243.33	\$199.15	\$220,837.64
9	\$1,242.21	\$200.27	\$220,637.37
10	\$1,241.09	\$201.40	\$220,435.98
11	\$1,239.95	\$202.53	\$220,233.45
12	\$1,238.81	\$203.67	\$220,029.78
13	\$1,237.67	\$204.81	\$219,824.96
14	\$1,236.52	\$205.97	\$219,618.99
15	\$1,235.36	\$207.13	\$219,411.87
16	\$1,234.19	\$208.29	\$219,203.58
17	\$1,233.02	\$209.46	\$218,994.12
18	\$1,231.84	\$210.64	\$218,783.48
19	\$1,230.66	\$211.83	\$218,571.65

FIGURE 9.2 LOAN AMORTIZATION CALCULATOR

Specialty Lumber Calculator

The Specialty Lumber Calculator can be accessed by clicking the Calculator button then the Lumber Calc button on the EstimatorPRO **Sheet Utilities** toolbar or by clicking the Specialty Lumber Calculator button on the Framing Detail sheet.

The Specialty Lumber Calculator has a series of special calculators that can help you to quickly and accurately calculate the lumber needed for items such as rake walls, hip and jack rafters, common rafters, roof overbuilds, stair stringers, and floors and walls.

The Rake Wall Calculator

By entering the starting height of the wall, the wall length, the slope of the ceiling, and the stud spacing, the Rake Wall Calculator (Figure 9.3) will give the quantity and length of the wall studs that need to be ordered. The plate sizes are also given. Rake layouts for full walls, half walls, and dormer walls can be calculated. You have the option to display the picture or not.

The quantities of studs can be copied or added directly to the values of the selected cells on the detail sheet simply by selecting a cell on the worksheet and double clicking (with the left mouse button) the box with the quantity that you want to copy, add, or multiply. Select which function you want to perform.

Insert copies over the existing value.
 Add combines the values.
 Multiply inserts the product of the two numbers.

Specialty Lumber Calculator

Rake Hip Rafter OverBuild Stair Gable Floor-Wall

Takeoff Values

Starting Height (ft.) **A** 8

Wall Length (ft.) **B** 22

Slope 6

Spacing 16

Rake Layout

☒ Full Wall
☐ Half Wall
☐ Dormer Wall

☒ Show Diagrams
☐ Stud in Center

Quantities of Vertical Members

8' 2 16' 0
 10' 6 18' 0
 12' 6 20' 0
 14' 4 >20' 0

LF of Plate

Bottom Plate (LF) 22
 Top Plate (LF) 50
☒ Double Top Plate

Wall Area (SF)

297 / 32 = 9.28125
☐ Round

Input Lumber Qty's to Cell

☒ Insert Qty ☐ Add Qty
☐ Add LF ☐ Multiply Qty

Waste Factor

0 %

Decimal Conversion

in. ft.

Close

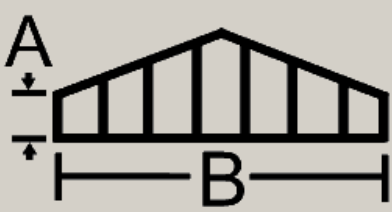


FIGURE 9.3 RAKE WALL CALCULATOR

Hip Rafter Calculator

The Hip Rafter Calculator (see Figure 9.4) gives the quantities and lengths of lumber needed for the hip and jack rafters of a hip roof. Calculations can be made for a full hip or only the hip end.

Specialty Lumber Calculator

Rake Hip Rafter OverBuild Stair Gable Floor-Wall

Takeoff Values

OverHang (in.) **A** 12

Span (ft.) **B** 28

Slope 6

Spacing 24

Roof Layout

☒ Full Hip
☐ Half Hip

☒ Show Diagrams

Jack Rafter Lumber to Order

8' 5 16' 4
 10' 4 18' 3
 12' 4 20'
 14' 4 >20'

Hip

Hip Length (ft.) 22.50
 # of Hip Rafters 2

Roof Area (SF)

528.27105 / 32 = 16.5084706
☐ Round

Input Lumber Qty's to Cell

☒ Insert Qty ☐ Add Qty
☐ Add LF ☐ Multiply Qty

Waste Factor

5 %

Decimal Conversion

in. ft.

Close

Plan View

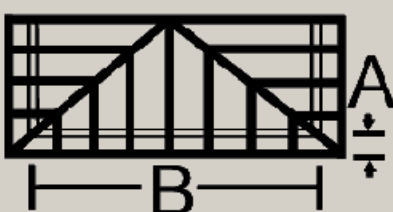


FIGURE 9.4 HIP RAFTER CALCULATOR

Common Rafter Calculator

The Common Rafter Calculator (see Figure 9.5) calculates the quantities and sizes of common rafters. Rafters can be calculated for gable roofs, straight sections of hip roofs, or for shed roofs. Notice that for most of these calculators, the sheathed quantities are also calculated.

Specialty Lumber Calculator

Rake Hip **Rafter** OverBuild Stair Gable Floor-Wall

Takeoff Values

Span (ft.) **A** 24

Length (ft.) **B** 37

Overhang (in.) **C** 24

Slope 6

Spacing 24

Roof Layout

☒ 2 Sides

☐ 1 side

☒ Show Diagrams

Quantities

Rafter Length (ft.) 16.44

Qty of Rafters 40

Plan View

Roof Area (SF) 1216.56 / 32 = 39

☒ Round

Input Lumber Qty's to Cell

☒ Insert Qty ☐ Add Qty

☐ Add LF ☐ Multiply Qty

Waste Factor 5 %

Decimal Conversion

in. ft.

Close

FIGURE 9.5 COMMON RAFTER CALCULATOR

Overbuild Calculator

A calculator is also available that will calculate the quantity and length of lumber for overbuild sections of a roof (see Figure 9.6). Lengths of rafters will vary for Overbuild/Blind Valley roofs compared to Intersecting Valley type construction. The lengths of lumber for both types of construction can be calculated. Common rafters, if needed, are also calculated and added to the lumber to order. The length of the ridge board is also calculated. Notice that the calculations can account for differing roof slopes of the intersecting roofs.

Specialty Lumber Calculator

Rake Hip Rafter **OverBuild** Stair Gable Floor-Wall

Takeoff Values

Length (ft.) **A** 8

Span (ft.) **B** 22

Overhang (in.) **C** 24

Slope 6

Spacing 24

Slope of supporting Roof 6

Rafter Lumber to Order

8' 3 16' 8

10' 2 18'

12' 2 20'

14' 2 >20'

Ridge Length (ft.) 19.00

Framing Layout

☒ Overbuild / Blind Valley

☐ Intersecting Valley

☒ Show Diagrams

Plan View

Roof Area (SF) 383.87697 / 32 = 12

☒ Round

Input Lumber Qty's to Cell

☒ Insert Qty ☐ Add Qty

☐ Add LF ☐ Multiply Qty

Waste Factor 5 %

Decimal Conversion

in. ft.

Close

FIGURE 9.6 OVERBUILD CALCULATOR

Stair Calculator

A Stair Calculator is also provided (see Figure 9.7). This calculator will give the length of the stringers needed for straight-run sets of stairs. The total rise is entered as well as either the total run or a unit run. An initial or approximate unit rise can be entered other than 7.5 inches if you desire. Two solutions are provided, but the user must be responsible that the solutions meet local codes. Notice that a decimal conversion calculator is also provided which converts decimal values to English, which measures to the nearest 1/16th of an inch or of a foot.

Specialty Lumber Calculator

Rake Hip Rafter OverBuild **Stair** Gable Floor-Wall

Takeoff Values for Straight Run Stair

Total Rise (in.) **A** 107

Total Run (in.) **B**

-Or-

Stair Unit Run 11

Approximate Rise (in.) 7.5

Top Step

☒ Below Platform

☐ To Platform

☐ Show Diagrams

Quantities

	Option 1	Option 2
Stringer Length (ft.)	16.06	15.24
Qty of Risers	15	14
Qty of Treads	14	13
Stair Rise (in.)	7.13	7.64
Stair Run (in.)	11.00	11.00

Note: Options may not meet code. Check local area codes.

Roof Area (SF)

/ 32 =

☒ Round

Input Lumber Qty's to Cell

☒ Insert Qty ☐ Add Qty

☐ Add LF ☐ Multiply Qty

Waste Factor

5 %

Close

Decimal Conversion

in. 16.06 16 1/16" ft.

FIGURE 9.7 STAIR CALCULATOR

The Gable End Calculator

The Gable End Calculator (Figure 9.8) calculates the area of gable ends. Enter the span, the slope, and the waste factor, and the area is displayed.

Specialty Lumber Calculator

Rake Hip Rafter OverBuild Stair **Gable** Floor-Wall

Takeoff Values

Span (ft.) **A** 26

Slope 6

Quantities

GablesSF 88.73

Input Lumber Qty's to Cell

☒ Insert Qty ☐ Add Qty

☐ Add LF ☐ Multiply Qty

Waste Factor

5 %

Close

FIGURE 9.8 GABLE END CALCULATOR

The Floor-Wall Calculator

The Show Framing Calculator is part of the Framing Materials Detail sheet (see Figure 9.9) and calculates quantities of floor joists, wall studs and sheathing based on figures from the Key Info sheet and from values that you enter.

Specialty Lumber Calculator

☐ Rake
 ☐ Hip
 ☐ Rafter
 ☐ OverBuild
 ☐ Stair
 ☐ Gable
 ☒ Floor-Wall

Wall
 LF of Wall: 135
 Stud Spacing: 24
 # of Studs/LF: 0.75
 Qty of Studs: 107
 Bottom Plate (LF): 142
 Top Plate (LF): 284
☒ Double Top Plate

Floor
 Length (ft.) A: 355
 Span (ft) B: 15.5
 Joist Spacing: 16
 Qty of Joists: 281
☒ Show Diagrams

Plan View

Floor Area (SF)
 5777.625 / 32 = 181
☒ Round

Input Lumber Qty's to Cell
☒ Insert Qty
 ☐ Add Qty
☐ Add LF
 ☐ Multiply Qty

Waste Factor: 5 %
 Close

Decimal Conversion
 in. ft.

FIGURE 9.9 FLOOR-WALL CALCULATOR

CHAPTER 10 Customizing Spreadsheets Using Excel Commands

For detailed instructions about using Excel spreadsheets and custom creating and editing estimating spreadsheets using Microsoft® Excel, you may want to obtain a copy of *Estimating with Microsoft® Excel: Unlocking the Power for Home Builders*. The book is also applicable to remodelers, trade contractors, suppliers, and other areas related to construction. *Estimating with Microsoft® Excel* can be purchased through BuilderBooks at the National Association of Home Builders (NAHB) by calling (800) 223-2665 or by visiting their bookstore online at www.builderbooks.com.

Entering Formulas into the Database

You can enter your own formulas into the QTY column of the database sheets. Formulas begin with "=" and cell references or names can be used in conjunction with operators such as + (add), - (subtract), * (multiply), and / (divide). Other functions are available through the function wizard (fx on the Standard Toolbar).

To Name a Cell or a Range of Cells

1. Select the cell, range of cells, or nonadjacent selections that you want to name.
2. Click the Name box at the left end of the formula bar.
3. Type the name for the cells.
4. Press Enter.

NOTE: You cannot name a cell while you are changing the contents of the cell.

Individual cells and ranges of cells can be named. To name a range of cells, select the range of cells and type a one-word name into the Name box (on the left side of the Edit bar) then press Enter.

Moving Sheets

You may want to change the order of the sheets in a workbook. To move a sheet's order, click on the sheet tab and drag it to its new location. Alternatively, you can move a sheet by right clicking the sheet tab, click Move or Copy from the menu, and choose the new location.

Comments

Comments can be added to any cell to give special instructions or reminders to the user. In EstimatorPRO, there are many comments to help you as you do your estimating. Cells with comments are marked with a small red tag in the upper right corner of the cell. As you pass over these cells with the cursor, the comment boxes open to display the comment.

To Add a Comment to a Cell:

1. Click the cell to which you want to add the comment.
2. On the **Insert** menu, click Comment.
3. In the box, type the comment text.
4. When you finish typing the text, click outside the comment box.

To Edit Comments in a Cell:

1. Click the cell with the comment you want to edit.
2. On the **Insert** menu, click Edit Comment.

To Clear Contents, Formats, or Comments from cells:

1. Select the cells, rows, or columns you want to clear.
2. On the **Edit** menu, point to Clear, and then click All, Contents, Formats, or Comments.

NOTE: If you click a cell and then press Delete or Backspace buttons, Microsoft® Excel removes the cell contents but does not remove any comments or cell formats. If you clear a cell, Microsoft®Excel removes the contents, formats, comments, or all three from a cell. The value of a cleared cell is 0 (zero), and a formula that refers to that cell will receive a value of 0.

TIP: To remove all comments from a worksheet, click Go To on the **Edit** menu, click Special, and then click Comments. Then point to Clear on the **Edit** menu, and click Comments.

Magnify or Reduce the Display

In the Zoom box (in the Standard Toolbar), click the size you want, or enter a number from 10 to 400. To enlarge a selected area to fill the window, click Selection.

NOTE: Changing the magnification does not affect printing. Sheets are printed at 100 percent unless you change the scaling on the Page tab of the Page Setup dialog box (File menu).

Linking Cells

Linking two cells is a powerful way to have one cell equal (mirror) the value of another cell:

1. Select the source cell.
2. Right click and select Copy.
3. Move to the target cell and click Edit/Paste Special and click Paste Link.

A faster way that can be used for links in the same workbook is to:

1. Select the target cell and type =
2. Move to the source cell and click it.
3. Then press Enter.

Hide A Row Or Column

To hide a column or columns:

1. Select the column or columns by clicking on the column headings (i.e. columns B, C, D).
2. Right click and select Hide.

To unhide a column or columns:

1. Select the columns adjacent to the hidden columns.
2. Right click and select Unhide.

Printing to a Specified Number of Pages (Fit to Page)

To make a printed worksheet fit the paper width:

1. Click the worksheet.
2. On the **File** menu, click Page Setup,

3. Click the Page tab.
4. Click Fit to.
5. In the first box beside Fit to, enter 1 (for 1 page wide).
6. In the second box beside Fit to, delete the value so that the number of pages tall is unspecified.

NOTE: Microsoft® Excel ignores manual page breaks when you use the Fit to option. Make page breaks work when you use Fit to.

When you change the values for Fit to, Excel shrinks the printed image or expands it up to 100 percent, as necessary. To see how much the image will be adjusted for your new values, click OK, and then click Page Setup on the File menu. The Adjust to box on the Page tab shows the percentage that the printed size will be adjusted.

Q. Who should use Estimator*PRO*?

A. Estimator*PRO* was designed for home builders and remodelers who want to decrease the time they spend estimating while increasing the accuracy and detail of their estimates.

Q. Why was it developed to work with Excel?

A. Excel is a powerful spreadsheet program that many companies already use and it allows you the flexibility to change and customize the estimating process to fit your specific needs. This allows you to use Estimator*PRO* to estimate at the level of detail you want. You can plug in bid amounts, calculate costs based on unit cost figures, or run more detailed estimating.

Q. What's new in Estimator*PRO* 5.0?

A. The great advantage of 5.0 is its integration with QuickBooks Pro® (2002, 2003 and Contractor's editions). Estimates and Purchase Orders can be created in QuickBooks Pro quickly and efficiently and items are posted to the category accounts with the click of a button. Your existing QuickBooks contacts can be automatically transferred to the Estimator*PRO* contacts database.

Q. How do I install Estimator*PRO*?

A. Click **Start Menu**, Run.
Click Browse and navigate to your CD drive.
Select **Setup.exe** and click Open.
Verify that the name of the file is correct and press OK.
The files will be installed to the **C:\Program Files\Estimator*PRO*** subdirectory.

Q. How do I upgrade from Estimator*PRO* 4.1 to 5.0?

A. To upgrading to a newer version of Estimator*PRO*, save a backup copy of your database and then uninstall the current version of EP before installing the upgrade version.

1. Click **Start Menu**, Settings, Control Panel, Add/Remove Programs.
2. Select the current version of Estimator*PRO* and click the Remove button.
3. Open Excel and go to **Tools**, Add-Ins, and from the pop-up box, uncheck Estimator*PRO*.
4. Click YES (or OK) to the warning that the Estimator*PRO* add-in will be permanently removed.
5. Install Estimator*PRO* 5.0.

NOTE: After upgrading to version 5.0, use the Update Database command button on the last sheet in the database ("LastEstimate" sheet) to automatically bring data in from the backed-up database from your last version of Estimator*PRO*.

Q. When I try to open Estimator*PRO* I get a warning sign about Macros. Should I enable them?

A. When Excel opens files that contain macros (procedure code that performs the functions of the spreadsheet) it will display a warning sign letting you know that the workbook contains macros. Because macros from unknown sources can contain viruses, the displayed pop-up box allows you to stop the workbook from loading the macros. Choose Enable Macros.

NOTE: When opening under Windows 2000 or XP for the first time, you will be prompted with the question, "Is this file from a trusted source?" You should check the always trust box so that in the future, you won't be asked if you want to enable macros when opening Estimator*PRO*.

Q. I try to open Estimator*PRO*, but it asks me if I want to update links or keep existing information. What do I want to do?

A. When Estimator*PRO* opens, a box will open asking if you want to update links or keep the existing information. Click No.

Because the Estimator*PRO*1.xls file has links to the database file (Estimator*PRO* DB.xls), it asks if you want to connect those links before opening the database file. If you answer Yes, the computer will freeze up while trying to open all of the links to the unopened database. It's better to say No and wait until the database file is opened to automatically establish all the links.

Q. What is the first step in using Estimator*PRO*?

A. View the Overview Demo located in Chapter 4 of the User Guide. It will walk you through the process of creating an estimate. Additional demos, in Chapter 8 will show you how to create Purchase Orders, and Estimates and export them to QuickBooks Pro.

You can begin using Estimator*PRO* right away to create your estimates and purchase orders. However, you may want to customize Estimator*PRO* to meet your needs, first. Import your own contacts database from QuickBooks or enter your own contact information. You may also change, delete, or add items in the cost database. If you have a database from previous versions of Estimator*PRO*, you can import that as well. You can also customize the Summary sheet by adding or deleting line items (phases of construction).

Once you have personalized Estimator*PRO* you can begin your estimate. Fill in the **Key Info** sheet with specifications of your particular project. To get to the **Key Info** sheet, click on the (red) key icon located on the Estimator*PRO* utilities toolbar and click the Goto Key Info button. Once completed, move back to the **Summary** sheet by clicking the icon button that looks like a world (**Go To Summary** button on the Navigation tool bar). Next, click on any of the detail sheets to begin estimating.

Q. Where do the preset item costs come from?

A. The cost database that comes with Estimator*PRO* has many items that you would typically want to estimate for a job. The costs that are associated with the items are realistic but may not reflect the costs that you are paying for material, labor, or equipment. You may change the costs, add or delete to the items already listed in the databases, and enter the name of your supplier or tradecontractor.

Q. How do I change the costs and/or items in the database?

A. You can quickly and easily change the costs and/or items in the database by going to the database and entering in new information. On the Estimator*PRO* navigational toolbar, select GotoDatabase

You can also click the Click Here button on the appropriate detail sheet and click the Edit DB button on the Material DB pop-up box.

Q. How can I use data from a different database?

A. Scroll to the last sheet in Estimator*PRO* by moving to the last sheet tab and clicking on the tab

DatabaseLinks. (You can also click on the Show Sheets button on the Estimator*PRO* **Utilities** toolbar and select the DatabaseLinks sheet.)

Click on the Change Database Link button and navigate to the database that you want to use.

The Estimator*PRO* Database.xls file is located in the **C:\Program Files\EstimatorPRO** directory.

NOTE: It is a good idea to create a separate folder to store your backup and specialty databases, for example, **C:\Projects\Databases**.

Q. How do I add custom estimating worksheets to my Cost Breakdown Summary sheet?

A. Click the **Summary** menu button on the Estimator*PRO* Utilities toolbar and then click Customize Summary.

When the pop-up dialog box appears, be sure a check mark is in the Show Hidden Phases box. Choose from one of the custom worksheets (Custom 1 through Custom 30) by clicking on the worksheet name. Click the Unhide button, and close the pop-up box. The Custom sheet name will show up on the Cost Breakdown Summary sheet. Click on the name and it will take you to the custom detail sheet where you can click the Change Sheet Name button to rename the sheet and its corresponding database sheet.

Q. What reports can Estimator*PRO* generate?

A. Estimator*PRO* comes with several reports plus you have the flexibility of creating your own custom reports. The reports that Estimator*PRO* comes with are:

Cost Breakdown Summary report. Used by the builder or remodeler to summarize, track, and analyze costs.

Customer Summary report. Similar to the Cost Breakdown Summary report but allows you to distribute all or part of your profit across the phases that you choose.

Executive Summary report. Each phase of construction is listed along with any notes you may want to write and the estimated costs for each phase. The Estimated Costs column may be hidden so that only the Total Sales Price is displayed along with the construction phase items and the notes.

Change Order Summary. This report tracks all change orders for each phase of construction. The estimated costs and change order amounts for each phase are summarized for the project.

Customer Bid Form. Used to present your bid to a customer, this form has the total bid price, notes about the job, and allows you to show specific phases and allowances and the associated amounts that are included in the bid.

Purchase Orders. Purchase orders are created from completed detail take-off worksheets. They are numbered and can be saved with the estimate or on a separate workbook.

Detail Sheets. Each Detail sheet can be printed to communicate specifics of a construction phase or to keep historical paper records, you can print each or all of the detail sheets.

Q. Why is Estimator*PRO* taking so long to open or to save?

- A. After using Estimator*PRO* for some time, you may find that it begins to slow down or even crash when you open or save a file. When Excel opens an MSO file (Microsoft Object), it is stored in a TEMP folder (Usually C:\Windows\Temp or C:\Program Files\Temp). After so many MSO files are created (800-1500) and stored in the Temp folder, Estimator*PRO* begins to operate slowly until it crashes to a halt.

Close out Excel and clean out the temp folder(s).

If you can't find the MSO files in either one of these Temp folders, search for "MSO" and delete those MSO files that are in Temp folders. If all of the files cannot be deleted from the Temp folder (because some may be in use at the time), don't worry, delete as many as you can. If a program needs a file in the temp folder and it isn't there, the program will automatically recreate the file.

- Q. What are the minimum system requirements for Estimator*PRO* 5.0?

- A. Microsoft® Excel 2000 or later.
QuickBooks® 2002 or later, or Contractor Edition.
Windows 98se, 2000, XP or later.
Pentium 450 (or comparable).
RAM-64mb (Win98), 128 (Win2000 and later).