

## Anytime Learning | Estimate Fundamentals Subscription

The Estimate Fundamentals Anytime Learning subscription provides a convenient introduction to creating and managing estimates using the Sage Standard or Extended Estimating solutions. These pre-recorded, online lessons are perfect for those who are new to the software, or those who need to refresh their knowledge or pick up some time-saving tips.

Participate in these lessons to learn how to create complete estimates with accurate quantities and calculations and the most up-to-date pricing information, in a flexible and professional format. You'll see how to work with spreadsheet layouts and sequences so that you can view the information you need, organized and presented according to your preferences. You'll also learn how to reprice estimates, work with estimate totals, and produce useful, flexible reports. In addition, we'll show you how to automate the process of sending estimate details and changes to your accounting applications.

Each 20-25 minute lesson offers easy-to-follow explanations of concepts, and demonstrations of typical software processes and shortcuts. Every lesson includes hands-on activities with step-by-step instructions, to reinforce the information presented in the lesson. The activities allow you to practice each process, and experiment with different options and scenarios, using sample company files.

The Estimate Fundamentals Anytime Learning subscription provides access for a full year to 18 online lessons, available to your entire staff. With Anytime Learning, you can learn at your own pace, as your busy schedule allows. Your employees can view each lesson as many times as they want, anytime, from almost anywhere. All that is required is a high-speed internet connection and a computer with headphones or speakers. To complete the hands-on activities, you must have Sage Standard or Extended Estimating installed on your computer.

**Audience:** The Estimate Fundamentals Anytime Learning subscription is appropriate for those using Sage Timberline Office or Sage Master Builder with the Standard or Extended estimating solution. This subscription does not cover the Sage Master Builder Basic estimating software.

The following courses and lessons are included in the Estimate Fundamentals Anytime Learning subscription.

### Course: Building an Estimate

#### Lesson 1: Estimating Overview

What is the difference between an Estimate file and a Database file? How do these files work together? You'll become acquainted with these files and essential concepts and terminology in this introduction to Sage Standard or Extended Estimating. You will navigate the Estimating menus, learn how to locate and print database and estimate reports, and practice finding answers in Help. We'll lead you through a tour of the Estimating and Spreadsheet windows, and give you the opportunity to practice several shortcuts.

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### **Lesson 2: Create an Estimate**

This lesson includes suggestions for how to organize and name your estimate files, and where to locate your database files. You will create a new estimate, and learn about important information to enter before you begin adding items to your estimate spreadsheet.

### **Lesson 3: Quick Takeoff**

What is Quick Takeoff, and when you should use it? You will practice using this method to add items to an estimate spreadsheet. You'll learn several ways to enter item quantities, and you'll get experience using the Enter Dimensions feature with Quick Takeoff. We'll show you an easy way to search for items as you perform takeoff. You will also see how to add those rarely-used or one-time items to an estimate.

### **Lesson 4: Item Takeoff**

Find out how to use this efficient takeoff method to add multiple items to your spreadsheet at once. You'll learn how to take off groups of items, yet enter variables and dimensions only one time. You'll see how to review items before you add them to your spreadsheet, and how to use the Add Pass feature to repeat the take off of groups of items, multiple times. You'll also learn an easy way to clear mistakes.

### **Lesson 5: Assembly Takeoff**

This lesson is designed to help you understand assemblies, and use them to develop your estimates. You will learn to use Assembly Takeoff to add all of the items to your spreadsheet that are needed to complete a unit of work, such as a sidewalk, a wall, or a concrete slab. In addition, you'll discover how to modify an assembly within an estimate. As you practice using Assembly Takeoff, you'll appreciate the time-savings that this takeoff method offers.

## **Course: Working with the Spreadsheet**

### **Lesson 6: Spreadsheet Layouts**

Explore the many ways that you can customize the appearance of your spreadsheet. Learn how to rearrange the order of columns, hide or display columns, and change the properties of each column. Can you rename a column? Change its color? Change its font? Change the number of decimal places? Yes, yes, yes, and yes—but that's not all! Discover how to save your modifications as a Spreadsheet Layout, and how to create multiple layouts for different circumstances or people.

### **Lesson 7: Sorting Your Spreadsheet**

Sage Standard and Extended Estimating offer incredible flexibility in determining the sort order of the items on your spreadsheet. Learn how to create and save custom sort sequences, using up to ten sort levels. Find out how the software sorts and aligns alphanumeric columns. Learn about the two types of sorting methods, ASCII and ANSI, and how to select or change your sorting method.

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### **Lesson 8: Manipulating Your Spreadsheet**

How can you change the values on your spreadsheet? In this lesson, you'll learn how to use common editing tools, such as Copy, Paste, Fill Down, and Copy Sum, to change values in your spreadsheet. You'll also find out how the Combine Items feature operates.

### **Lesson 9: Use Location**

Do you know the benefits of using the Location column on the spreadsheet? We'll give you ideas on how to use this column, and show you how to organize your spreadsheet by Location, and use Location as a sort sequence. Learn how to assign allocation on a job site to items during takeoff, and how to assign or modify a location to an item after it has been added to the spreadsheet.

## **Course: Totals and Reports**

### **Lesson 10: Estimate Totals**

Learn how to display the estimate grand totals at the bottom of the spreadsheet window, and how to open the Totals window, and dock it on the spreadsheet. Find out how to create addons or markups in your database, and then insert them to the Totals window. You'll learn how to create several types of addons, how to allocate addons, and how to change the position of an addon on the totals window.

### **Lesson 11: Customize the Totals Window**

In this lesson, you'll explore many ways to modify the rows, columns, and cells on the Totals window. You'll also learn how to rearrange the rows on the Totals window. Find out how to save your modifications to a Totals Window Template, and then apply that template to a different estimate.

### **Lesson 12: Report Options**

What kind of options can you change on a report before you print it? View this lesson to discover how common report options affect your printed reports. You'll also learn how to get a spreadsheet report that looks just like your spreadsheet. We'll show you how to save your favorite reports as Report Layouts, which you can use over and over again to easily produce reports in a consistent format. You'll get to experiment with several report options, and use the Preview Report feature.

### **Lesson 13: Print Reports**

Do you want to move beyond the typical report options? View this lesson to discover and practice some flexible, fun, and impressive report options. You'll learn how to change the sort levels and detail levels of a report, and how to use ranges to limit the information that is included on a report. You'll also see how to customize the font, style, and color of any report element. Learn how to add a custom header and footer to your report, with a company logo. Did you know that you can export a report to an Excel spreadsheet or to several other formats? You've got to try it!

## Course: Managing Your Estimate

### Lesson 14: Reprice an Estimate

Prices never stay the same. They change from season to season, and from one market to another. When it comes to repricing an estimate, we've got you covered. We'll show you how to reprice individual items, how to reprice an estimate based on updated database prices, and how to modify certain prices by a fixed percent. But that's not all. We'll show you how to reprice an estimate for a different cost index, allowing you to track prices for different locations.

### Lesson 15: Address Book

Start taking advantage of Estimating's connection to your company's shared Address Book folder. Learn how to establish the link to the Sage Timberline Office Address Book, and then add your company and individual contacts. You'll probably find that many of your contacts are already set up there. We'll show you all the areas in Estimating where you can pull in companies and contacts from the Address Book. And of course, we'll introduce you to a few special shortcuts to make it easy to find and assign subs and vendors to items in your estimates.

### Lesson 16: Merge Estimates

Do you ever divide a project amongst several estimators? Or perhaps you sometimes split up a large project to multiple estimate files? If so, you'll really appreciate the ability to merge estimates. In this lesson, we'll discuss several scenarios in which the Merge Estimates feature proves useful. We'll lead you through each step of the merge process, and explain your options. We'll also show you how a Master Estimate can simplify the merge process. At the end of this lesson, you'll get to merge some estimates on your own, and see the results first-hand.

### Lesson 17: Interface with Sage Timberline Office Job Cost

What kind of information can Estimating send to Sage Timberline Office Job Cost? We'll lead you through each step of the set up and execution of this interface, including exporting estimate transactions from Estimating and importing them to Job Cost. This interface will save your company the time and trouble of making duplicate entries.

### Lesson 18: Interface with Sage Master Builder

Did you know that you can exchange information between Sage Standard and Extended Estimating and Sage Master Builder? We'll explain how to prepare Master Builder to communicate with Estimating. Then you'll learn about the settings and fields in Estimating that establish a link to Sage Master Builder. We'll show you how to use the Interface Wizard to send proposals, budgets, and change orders from Estimating directly to Master Builder. You've got to see it to believe how easy it is, so of course we have sample files so that you can try out this transfer of data yourself.