



# Sage Estimating Essential v20.1

## Release Notes

May 2022

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Last updated: May 3, 2022

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# Version 20.1 Release Notes

This document provides important information about your Sage Estimating Essential 20.1 software. Read these release notes carefully before installing Sage Estimating Essential 20.1.

## Welcome to Sage Estimating Essential!

Sage offers Sage Estimating Essential—a robust estimator's toolkit—at a competitive price for small- to medium-sized businesses. Sage Estimating Essential blends ease of use with spreadsheet and standard database tools that enable you to estimate jobs more productively and profitably.

For even more versatility, it also integrates with the following, separately licensed, construction and accounting software:

- Sage 100 Contractor
- Sage 300 Construction and Real Estate
- eTakeoff

## Read the Supporting Documentation Before You Begin

Read the following supporting documentation carefully before you install, configure, and use Sage Estimating Essential:

- The *Getting Started Guide* provides an operational overview of the Sage Estimating Essential software.
- The *Installation and Administration Guide* includes a system overview, installation and configuration instructions, and information about managing your Sage Estimating license.
- The *Quick Start Checklist* provides a list of tasks you need to perform to get Estimating Essential "up and running." You can use it to check off tasks as you complete them.
- The *Sage 100 Contractor Integration Guide* describes how to integrate Sage Estimating Essential with Sage 100 Contractor, making certain data in that program available in Sage Estimating Essential, and it explains how to use the interface wizards to send proposals, budgets, and change orders you create in Sage Estimating Essential to Sage 100 Contractor.
- The *Sage 300 Job Cost Integration Guide* provides installation, setup, and operating instructions for Sage 300 Job Cost integration.
- The *Means Integration Guide* provides installation, setup, and operating instructions for Means Integrator.

### Notes:

- For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 105383, available at <https://support.na.sage.com/selfservice/viewdocument.do?externalId=105383>.
- All the documentation for Sage Estimating Essential is available at <http://cdn.na.sage.com/Docs/en/customer/estimating/DocumentationEss.htm>.

## Video tutorials demonstrate how Estimating works!

Sage has created a series of video tutorials that demonstrate how you use Sage Estimating Essential. You can view them by clicking **Help > Video Tutorials** in the Estimating application.

## Installation Notes

### System Requirements

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article ID 105383, available at <https://support.na.sage.com/selfservice/viewdocument.do?externalId=105383>.

### Installing Sage Estimating

Refer to the [Installation and Administration Guide](#) for complete instructions on installing the software and migrating or upgrading your data.

### Before Installing

#### Important!

- Microsoft .Net 4.6.2 is required for Estimating. If it is not already installed on your computer, the Estimating installation will require a restart. If you prefer not to restart when installing Estimating, first install .Net 4.6.2 from the Prerequisites folder (in the Install folder), and then restart your computer before installing Estimating.
- If you are upgrading to version 20.1 and you are using third-party software that integrates with Sage Estimating, check with the third-party software vendor to ensure that their software is compatible with version 20.1 before you upgrade.

## We've been listening to you!

Sage thanks you for your product ideas!

In Sage Estimating Essential version 20.1, we have incorporated the following customer request:

- On the spreadsheet, you can now highlight and tag individual cells and groups of cells.

You can use the cell highlighting and tagging feature in a multitude of ways during takeoff, pricing, and review. For example, you can highlight cells to mark start and end points, unusual items, changes, elements that represent an advantage in the bidding process, incomplete work, and more.

Thank you, Bill B, for suggesting this enhancement!

The next section describes this enhancement in more detail.

# New Features and Enhancements

Sage Estimating version 20.1 introduces the following significant features:

- [The ability to highlight and tag spreadsheet cells.](#)
- [Improved, editable productivity and price factors.](#)
- [Simplified setup and configuration.](#)
- [Improved processes to import and export estimates.](#)

It also includes a few [miscellaneous improvements](#) to simplify your use of Sage Estimating.

## Highlight and tag spreadsheet cells

On the spreadsheet, you can now highlight and tag individual cells and groups of cells. For example, you might need to adjust a calculated factor to reflect a sudden change in productivity, but you're not yet certain how to quantify that change. You know you'll need to revisit the factor after validating your assumptions, so you highlight the cell with a different color to set it off from other cells on the spreadsheet, and tag it to remind you about the information you wanted to validate.

### To highlight cells:

1. Select a cell or a group of cells that you want to highlight, and then right-click.
2. From the shortcut menu, click **Edit Highlight**.
3. In the **Highlight Color** window, select a fill color for the cell or group of cells, and then click **[OK]**.

After highlighting items on the spreadsheet, you can click the new **[Show Only Highlights]** (on the Home tab of the ribbon) to display only rows that include a highlight.

### To tag a highlight for easy reference, later:

1. Right-click a highlighted cell, and then select **Tag Highlight** from the shortcut menu.
2. In the **Set Highlight Tag** cell, type a name to provide some significance to the highlight color (for example "Review factor override"), and then click **[OK]**.

When you no longer need the highlight and the tag, simply right-click the highlighted cell (or select the group of cells, and then right-click them), and then click **Clear Highlight** on the shortcut menu. Or, you can right-click the Select All button (in the top left corner of the spreadsheet) and then click **Clear All Highlights**.

## Take advantage of improved, editable productivity and price factors

You can use productivity factors to adapt your estimates to a variety of challenges—such as adverse weather or environmental conditions, and other variables that can affect the efficiency of labor and equipment, as well as the price of materials, subcontractors, and other costs you use on a construction project.

In previous releases of Estimating (SQL), the program calculated labor and equipment productivity automatically when you entered prices and quantities. To change the calculated productivity, you could enter a different amount in the Productivity Adjustment columns—but then the program readjusted the productivity factor to 1.

With version 20.1, you have more control in defining productivity factors and determining productivity. You can enter productivity factors for labor and equipment directly, or you can have Sage Estimating back-calculate the factors for you based on the quantities and costs or prices that you enter. Similarly, you can edit price factors for material, subcontracts, and other costs directly on the spreadsheet.

For example:

- In previous versions, when you changed the productivity or order quantity, Estimating calculated a new Base Productivity and set the Productivity Factor to 1.

In version 20.1, if you enter amounts that change productivity, Sage Estimating calculates a new Productivity Factor, leaving the Base Productivity unchanged.

- Similarly, if you changed the price, Estimating used to calculate a new base price and set the price factor to 1.

Now, if the price factor is not already 1, Estimating leaves the Base Price unchanged and calculates a new price factor.

## New spreadsheet columns make productivity variables more explicit

New spreadsheet columns expose base prices, quantities, costs, and cost per unit as follows:

New spreadsheet columns

Column	Purpose
Base Cost per Unit	This is the base amount divided by the takeoff quantity. Also called Base Unit Cost.
Base Price	The amount paid or asked per order unit for an item category before applying any price factor.
Base Price Unit	This is the unit description for the base price (the same as order unit).
Base Quantity	Either the takeoff quantity (with waste)



Column	Purpose
(for labor and equipment)	<i>multiplied</i> by base productivity, or the takeoff quantity (with waste) <i>divided</i> by base productivity.
Base Quantity Unit (for labor and equipment)	This is the unit description for the base quantity (the same as order unit).

**Note:** You may need to edit your current layout to display these columns.

## Change base amounts, productivity, and factors directly

In version 20.1, you can edit the following columns that previously you could only view:

### Newly editable columns

Column	Purpose
Base Amount	This is the order quantity (including productivity factor) multiplied by the base price.
Base Productivity	This value is used to change takeoff quantities to order quantities for labor and equipment. It does not include the productivity factor.
Price Factor	This value is used to increase or decrease the base price per item category to reflect local pricing.
Productivity Factor (for labor and equipment)	This value is used to increase or decrease the base productivity per item to reflect local working conditions.

**Note:** These changes apply to units of labor and equipment usage only. Unless the order unit is a unit of time, the Productivity Factor is always 1, and you cannot change it.

To help make productivity calculations more explicit, we have renamed some spreadsheet columns, as follows:

Comparison of column names

In previous versions	In version 20.1
Productivity Adj	Productivity Factor (for labor and equipment)
Conv Factor	Conversion (for material, subcontracts, other)
Conv Factor Unit	Conversion Unit (for material, subcontracts, other)

Also, throughout the program, references to City Cost Index or CCI have been renamed **Factor Table** and **Factors**.

**Tip:** If you change an amount that affects labor or equipment productivity, or if you change a productivity factor directly, Estimating inserts a comment for the cell. Cells that have comments are marked by a red triangle in the upper right corner. To view a comment, simply hover over the marked cell. Comments include the original value and, if appropriate, the percent change.

For more information, see the Estimating help.

## Adjust productivity quickly during assembly takeoff

Adjusting productivity for labor and equipment during assembly takeoff has never been easier! Rather than right-clicking a column in the assembly takeoff grid, and then selecting **Adjust Assembly** the shortcut menu, now you can simply click a new **[Adjust Productivity]** button after adding a pass that includes labor and equipment.

After entering your productivity adjustment in the Adjust Assembly Productivity window, assembly components that include labor or equipment are marked with a red triangle, indicating that the quantity has been adjusted. When you're satisfied that the adjustment is correct, finalize it by right-clicking the cell, and then clicking **Finalize Adjustment** on the shortcut menu.

## Preserve custom factors when you apply a factor table

If you adjust productivity or price factors manually for individual line items in an estimate and then apply a factor table to the estimate in the **Estimate Information** window or in the **Reprice from Factor Table** window, Estimating replaces them with new values derived from the factor table, unless you specify not to alter custom factors when you apply a factor table.

## To retain custom factors:

In the **Options** window, select the **Do not reprice prices and factors marked as manually adjusted** option.

When this option is selected, you can mark manually adjusted factors on the spreadsheet.

You can adjust a factor manually in the following ways.

- Type a new value in the factor cell.
- Use the shortcut menu to adjust the value (right-click the cell, click **Adjust**, and then adjust the value).

After adjusting a factor manually, a red triangle appears in the top right corner of the factor cell.

When you are satisfied that the factor value is correct, you finalize the adjustment by right-clicking the cell, and then selecting **Finalize Adjustment** from the shortcut menu. The red triangle is replaced by a green triangle, indicating that the adjustment is final. The program automatically marks the factor as manually adjusted

To mark factors as custom factors that should not be overwritten when you reprice the estimate, you right-click the cell, and then select **Mark Manual Factor** from the shortcut menu.

## Simplified setup configuration.

We reorganized the Configuration Wizard to make it easier use. We renamed the fields and buttons on the **Licensing** tab so that it is now more clear how to select a license type and connect to a license server.

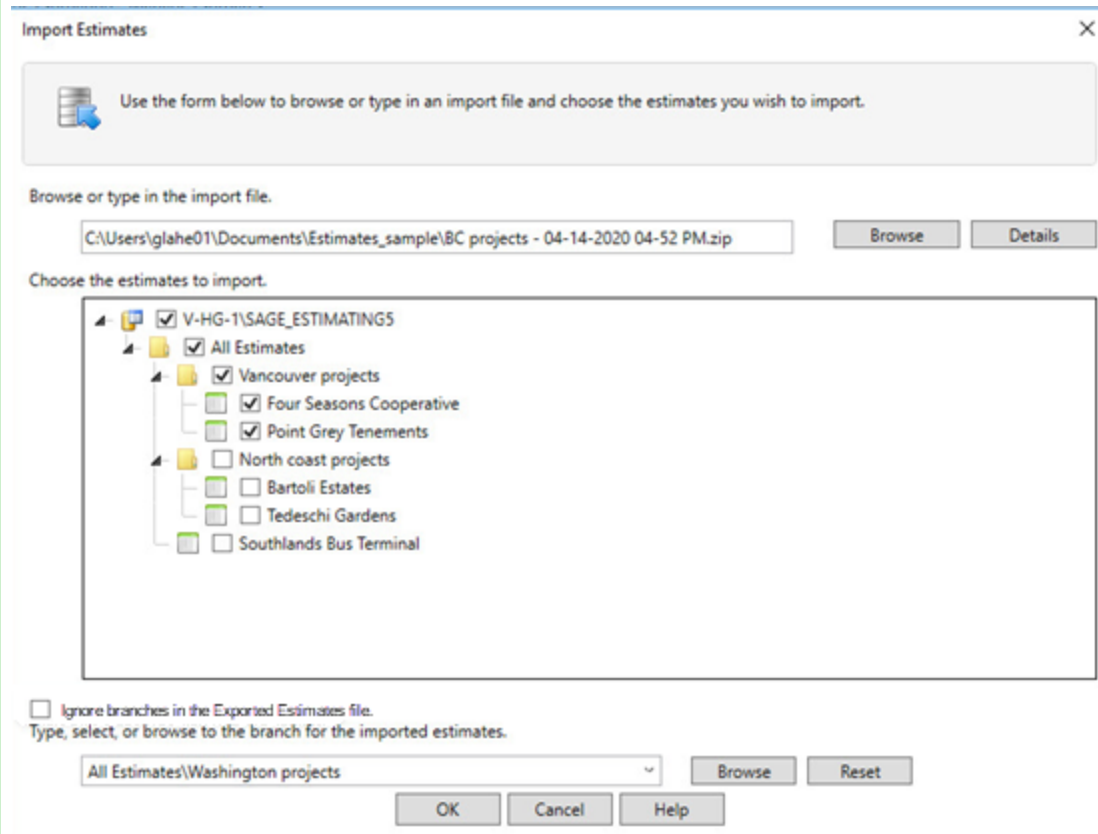
## Improved import and export of estimates in the Estimating Management Console and the Manage Estimates window

The most significant change to the import and export processes occurs "under the hood," during the export process, which now includes branch information in the estimate export file. Because of that change, additional functionality is available during the import process.

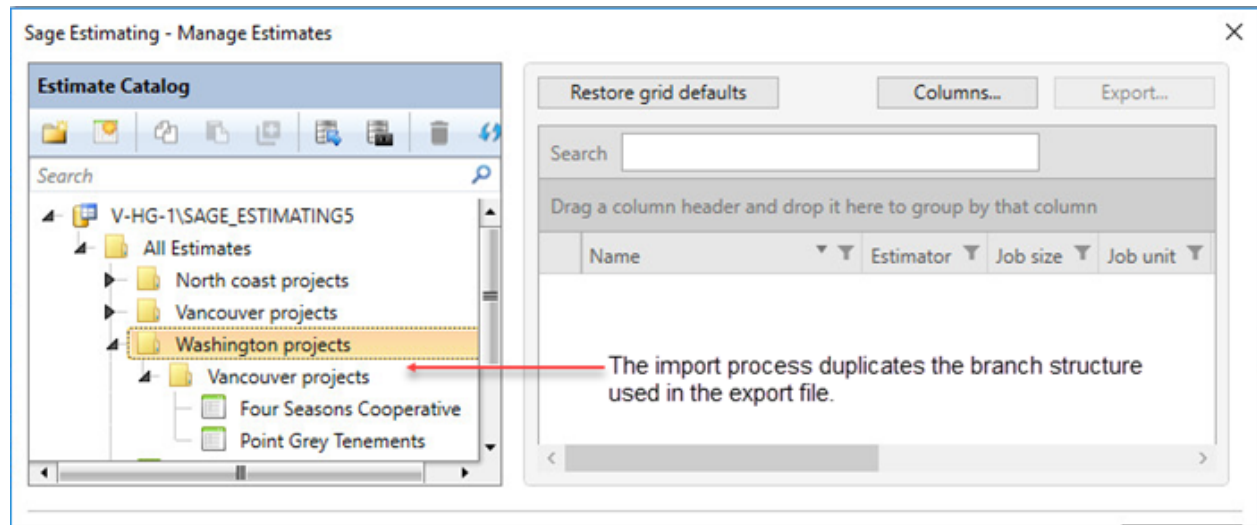
When selecting files to import from the exported estimates file, you can see the branch structure used in the export file. You can duplicate that same structure when you import the estimates, or you can import all the estimates into a single node or branch in the catalog by selecting a new **Ignore branches from the exported estimates file** option.

In addition, a new **Import Progress** window informs you about the progress of your import and lists the status of imported estimates. If you import an estimate that has the same name as an existing estimate in a branch, the import process now renames the imported estimate by appending a number to the estimate name. The Import Progress window displays imported estimates in a list, including their new branch location and (if an estimate was renamed during the import process) the new name.

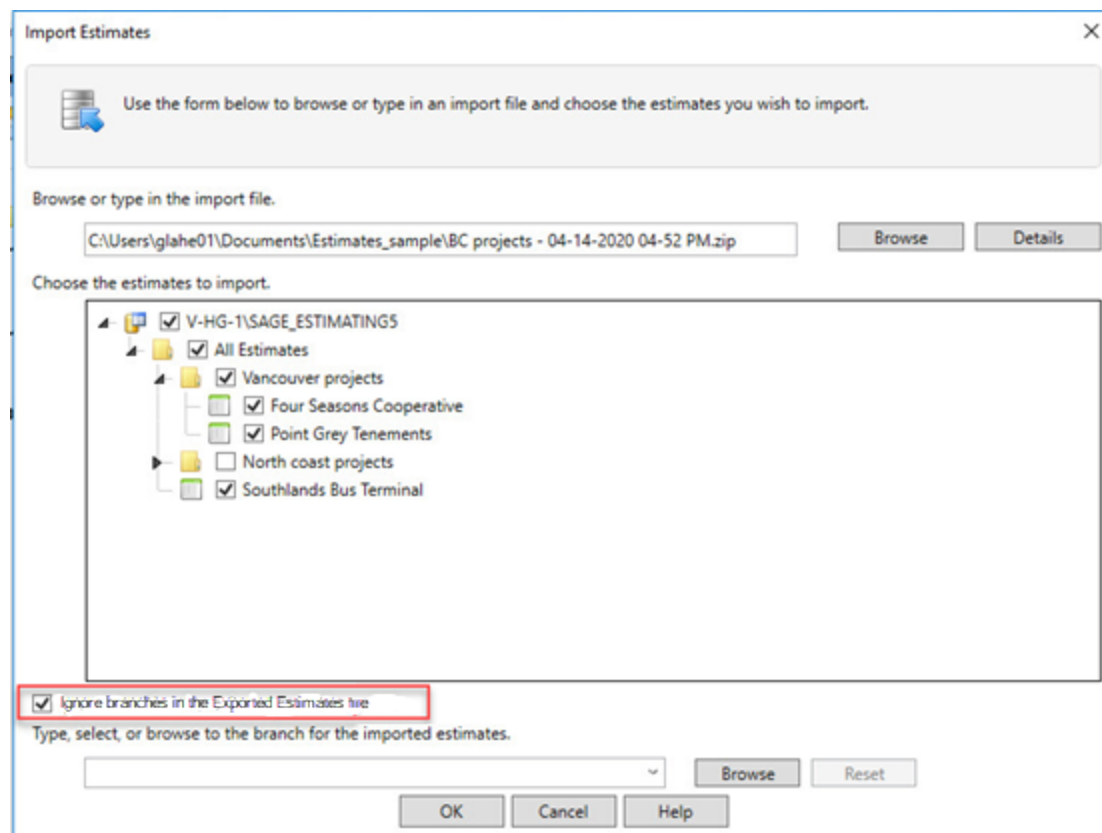
**Example: Copy the structure from the export file**



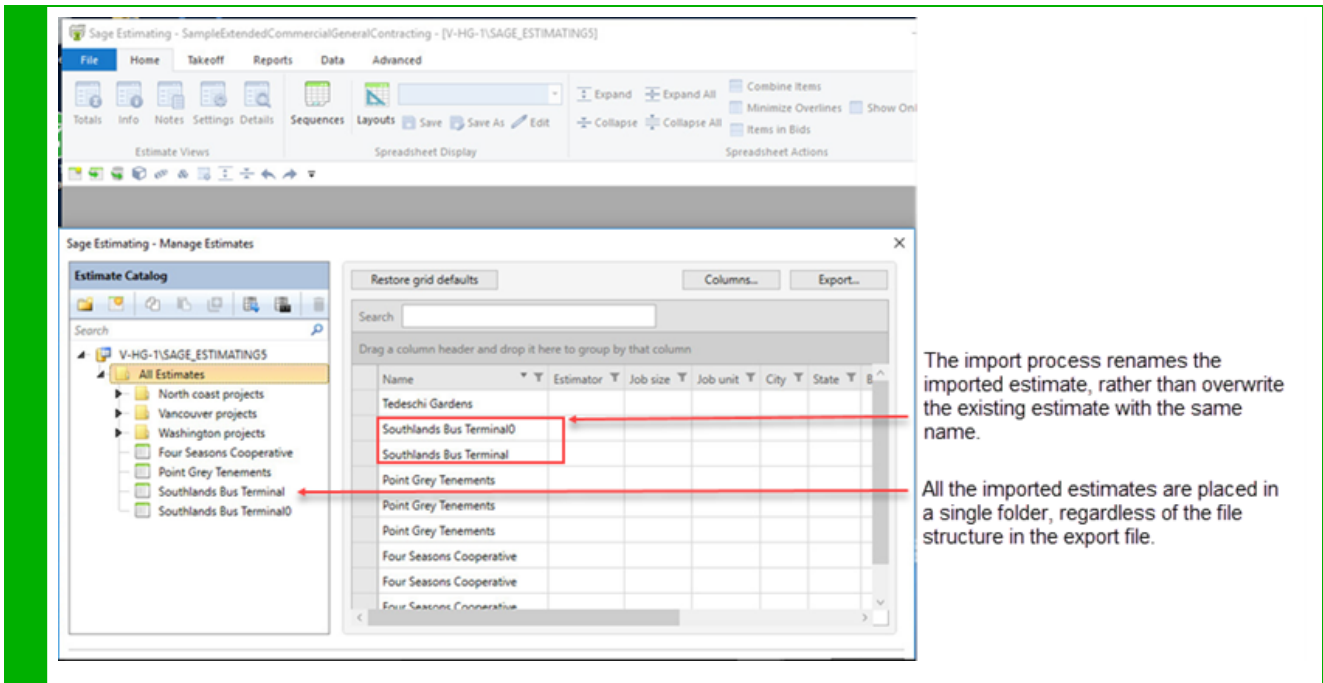
Result:




Example: Ignore the structure in the export file



Result:



We've also simplified the Import and Export windows, as follows:

- We've renamed these windows Import Estimates and Export Estimates, identifying the purpose of the windows more clearly.
- The toolbar in the **Estimate Catalog** includes new **Import estimates** and **Export estimates** icons (  ). You no longer need to right-click the node, and then select Import or Export from the shortcut menu—you simply select a node in the catalog, and then click the **Import estimates** or the **Export estimates** icon on the toolbar.

**Note:** We removed the Import estimates and Export estimates buttons from the ribbon in the **Manage Estimates** window, now that the new icons are available on the toolbar.

- We moved the details about a selected export file to a separate window. You open that window using a new **[Details]** button.
- In previous versions, the **Export Estimates** window included an **[Open Folder]** button, which function was eclipsed by the more versatile **[Browse]** button. Now, only fully functional fields are included in this window, so you are not distracted with less important information or duplicate functions.

## Miscellaneous improvements

- We have simplified the **New Estimate** window, with clarified instructions to help you create new estimates with ease.

- A convenient new Live Chat icon on the ribbon brings you directly to Sage Chat where you can chat with a Support analyst. (Previously, Live Chat was accessible only from the Help menu under Sage Support.)
- New shortcut keys are available in the spreadsheet.

You can display tabs quickly by pressing **Alt** together with the key for the first letter of the tab. For example, to display the Takeoff tab, you would press **Alt + T**. With these keys pressed, you can press one of the Key Tips that appear on the ribbon to open the corresponding function or window.

# Fixes Since the Previous Version

Version 20.1 includes the following fixes:

- **In the spreadsheet:**
  - Columns are inserted correctly when you place them at the end of a spreadsheet row.
  - On the spreadsheet report, the font for zero amount items appears correctly when on 4K and other high-resolution monitors.
  - In the Takeoff window, the Goto function selects the correct phase and item even if the list is collapsed.
  - In the spreadsheet, the WBS tooltip shows the description for the WBS code, rather than the value.
  - In the Bid Grid, amounts are calculated correctly when you toggle between a subcontractor and self-perform.
  - The Bid Grid report no longer skips subcontractors.
  - Information in the **Alternate Summary** pane now scrolls correctly when the pane is docked.
  - We fixed some display issues that sometimes occurred with 4K monitors.
  - In notes for variables, the **Enter** key works properly.
  - In the **Import Estimates** pane, if you try to paste an invalid path to an import file, the program warns you by highlighting the background of the location text box and displaying a large red dot beside the box.
  - If you install SQL Express when you install Estimating, the SQL installation uses the correct settings for shared memory and named pipes.
  - We have improved performance when you use your mouse in a large estimate that has combined items.
  - If you try to create an estimate that exceeds the capacity of your SQL database, you receive a message telling you that the estimate exceeds the maximum size.
  - You can rename items that you have copied into the spreadsheet, as expected.
  - The **Dimensions** context menu on selected quantities once again opens the **Enter Dimensions** window.
- **Miscellaneous fixes:**
  - We have improved performance when you edit WBS values with a large number of rows.
- **In the Database Editor:**



- The Database Editor displays descriptions properly for WBS columns.

**Note:** Because a layout can be used for multiple standard databases, the Database Editor and layouts now use the column name from the WBS code record. You cannot rename WBS columns except by changing it in the WBS code record.

- Performance is not seriously impaired when you delete a very large number of items.
- You can check out a standard database that has duplicate WBS values.
- If you collapse group phases in the Phases pane, the items grid refreshing properly when you select the first group phase after selecting another group phase.
- You can select non-contiguous cells in the Items grid by holding down the Ctrl key while you make your selections.
- You can drag and drop a column on the left side of a divided column, even if the column to the left of the dropped column is hidden. Previously, if the column to the left was hidden, the dragged column would drop on the right side of the divided column.
- The Replace function no longer skips cells that precede the active cell when you replace characters in several cells (such as a row or a column).

- **With productivity factors:**
  - In Assembly Takeoff, you can view tooltips when adjusting productivity.
  - When you use the Reprice from Factor Table window to restore base prices to an estimate to which a factor table was applied, you see only one confirmation dialog.
- **For Sage Estimating reports:**
  - In the spreadsheet report and the standard estimate report, the signature block reports the correct amount even if you round quantities and combine item.
  - The correct information appears on the Spreadsheet report when you print it in takeoff order.
  - Audit Action headings print correctly on the Takeoff Audit report.
- **In the Estimating Management Console:**
  - The **Copy Database** tool in the Estimating Management Console creates unique copies of source databases.
  - Migrating an Estimating (Pervasive) address book to an existing Estimating (SQL) address book no longer triggers errors for some addresses, if the address books are not synchronized.
  - You no longer receive an error message when upgrading standard database item list sort orders.
- **For Job Cost Integration:**
  - When exporting to Job Cost, you can choose to continue exporting if the export process finds duplicate WBS values.
  - When inserting a one-time addon for an estimate, you can close the **Job Cost Options** window properly after selecting a job cost phase.
  - When you export extras to Job Cost, Estimating sends WBS descriptions and values as expected.)
  - When you import jobs from Job Cost, the import process creates cost codes before you begin importing. If there are errors in the cost codes, you can choose to fix the errors during the import without stopping the import process.
  - Cost codes from Job Cost are properly formatted and displayed on overlines.
  - You are no longer required to include cost codes when you export markups and addons to Job Cost.

- **For the integrations with Dimension and Bridge**

- When you copy an item that came from Bridge, the copied item no longer appears to have come from Bridge also.

# Revisions to Version 20.1

This section describes enhancements and fixes we have included in revisions to the software since releasing version 20.1.

**Note:** Each update is cumulative. That is, each successive update includes all the fixes and enhancements provided in previous updates as well as additional fixes and enhancements in the current update.

## Update 6 (Build 20.1.2204.282, April 2022)

### Fixes

Update 6 includes the following software fixes:

- We fixed a problem that could prevent you from installing a standard database.
- You don't receive an error when you preview and print Crystal reports.

## Update 5 (Build 20.1.2112.081, February 2022)

### Fixes

Update 5 includes the following software fix:

- Means Integrator warns you if the \*.MIMX file is incompatible with your version of Estimating.

You can update Means 2022 files in Means Integrator.

## Update 4 (Build 20.1.2101.251, January 2021)

### Fixes

Update 4 includes the following software fixes:

- After upgrading, columns that were hidden in saved spreadsheet and report layouts remain hidden. Base Price columns are not automatically turned on if they were not visible in the saved layout.
- You can duplicate estimates that include "quick sorts" on columns. (These are any columns that you right-clicked, then clicked **Sort Ascending** or **Sort Descending** on the shortcut menu.)

## Update 3 (Build 20.1.2011.062, November 2020)

### Fixes

Update 3 includes the following software fixes:

- You can import estimates that include "quick sorts" on columns. (These are any columns that you right-clicked, then clicked **Sort Ascending** or **Sort Descending** on the shortcut menu.)
- In Database Editor, you can now import prices for items that are selected as default takeoff items in assemblies.

## Update 2 (Build 20.1.2010.063, October 2020)

### Fixes

Update 2 includes the following software fixes:

- The Means Integrator now skips modified City Cost Index tables in the standard database and updates the national average correctly.
- Estimating no longer warns subscription customers before the expiration date that their subscription is expiring.
- When you use the **Clear Sort** option in the shortcut menu, Estimating now clears the sort properly.
- When you adjust a total in the spreadsheet, and then undo the adjustment from the shortcut menu, Estimating restores the overline value properly.

## Update 1 (Build 20.1.2007.152, July 2020)

### Fixes

Update 1 includes the following software fix:

- When you import multiple estimates from a group of estimates that you exported together in a previous version of Estimating (SQL), all the estimate information is imported correctly.

If you imported estimates from a group of exported estimates before this update, follow the steps outlined in [Knowledgebase article 105869](#) to fix the imported estimates.

# Known Issues

## SAP Crystal Reports compatibility with other Sage programs

Sage Estimating version 20.1 uses the SAP Crystal Reports Runtime version 13.0.22, which is compatible with ***Crystal Reports Sage Fixed Assets 2018.1, and later.***

Do not use earlier versions of Sage Fixed Assets on the same computer as Sage Estimating.

For more information, see [Knowledgebase article KB 93436](#).

# Need help?


## How to Get Help

Get help by:	Recommendation*	To access:
Reviewing in-product help	View information about the current window as well as procedures for using Estimating.	Click the Help button or icon, or press [F1] to display the Help topic for that window.
Reading product documentation	View documents and reference material from the Estimating Product Documents website.	Visit <a href="http://cdn.na.sage.com/Docs/en/customer/estimating/DocumentationESS.htm">http://cdn.na.sage.com/Docs/en/customer/estimating/DocumentationESS.htm</a>
Searching the Knowledgebase	Search the Sage Knowledgebase, which provides 24/7 access to support articles as well as the latest software downloads and updates.	Visit the Knowledgebase at <a href="http://www.sageKB.com">www.sageKB.com</a>
Asking the community	Join industry peers, certified partners, and Sage pros online 24/7 in Sage City—the best place to ask questions and share product experiences, tips, and tricks.	Visit the General Estimating forum at <a href="http://www.SageCity.com">www.SageCity.com</a>
Checking the latest product alerts	Keep up with the latest product information in the Sage City	Visit <a href="http://www.SageCity.com">www.SageCity.com</a>



Get help by:	Recommendation*	To access:
	<i>Announcements, News, and Alerts</i> forum.	
Exploring training options	Learn how to harness the full power of your software through videos and classes at Sage University.	Visit <a href="http://www.SageU.com">www.SageU.com</a> You can also get access to Sage University from the Estimating File menu by selecting <b>Help &gt; Sage University</b> .
*Not all options are available for all products.		

## Submitting Enhancement Requests

We want to hear your suggestions for improving the software. To send us your comments, click on the File menu button  and then select **Help > Submit Product Idea**.