



# Sage Estimating (SQL) v24.1

## Release Notes

July 2024

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Last updated: July 10, 2024

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# Version 24.1 Release Notes

This document provides important information regarding new features and changes in your Sage Estimating 24.1 software. Read these release notes carefully before installing Sage Estimating 24.1.

## Installation Notes

### System Requirements

For current information about supported operating systems, Internet browsers, Microsoft® SQL Server®, and other software, and about system requirements for servers and client workstations, refer to our Knowledgebase article [System Requirements for Estimating v24.1](#).

**Note:** The system requirements are the minimum for a computer running Estimating with one SQL Server instance. Running several other business programs with multiple SQL Server instances may affect the performance of your system.

### Migration from Estimating (Pervasive) to Versions after v20.1

The migration path from Estimating (Pervasive) to this release is not direct. If you have been using a Pervasive-based version of Sage Estimating, you need to:

1. Migrate (transfer) your existing Pervasive-based data to Estimating (SQL) v20.1.

**Important!** Sage recommends that you first migrate your data to a test environment to ensure that the migration proceeds smoothly. For example, if there are errors in your Pervasive-based data, you have an opportunity to correct them in that version before migrating the data to a live environment.

2. Upgrade your database from v20.1 to this release.

For information about migrating your Pervasive-based data to Estimating (SQL), see the version 20.1 *Installation and Administration Guide*.

**Tip:** You can continue to operate v20.1 alongside this current release. If you have a large number of estimates in Estimating (Pervasive), you can migrate them to version 20.1, export them from version 20.1, and then import them later into this version, as needed.

## Installing Sage Estimating

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

### Before Installing

#### Important!

- Microsoft .NET 4.8 is required for Estimating. If it is not already installed on your computer, the Estimating installation will require a restart. If you prefer not to restart when installing Estimating, first install .NET 4.8 from the Prerequisites folder (in the Install folder), and then restart your computer before installing Estimating.

If you receive a message about .NET during installation, stop the installation, restart your computer, and then run the installation program again.

- Sage Estimating (SQL) version 24.1 is compatible with version 21.1 of Sage 300 Construction and Real Estate, and later. If you integrate Estimating with Sage 300 Construction and Real Estate for Job Cost or Project Management, do not install Sage Estimating (SQL) version 24.1 until you install Sage 300 Construction and Real Estate version 21.1, or later.
- If you are using third-party software that integrates with Sage Estimating, check with the third-party software vendor to ensure that their software is compatible with version 24.1 before you upgrade to this version.

# We've been listening to you!

Sage thanks you for your product ideas!

In Sage Estimating (SQL) version 24.1, we have incorporated the following customer requests:

- When merging estimates, if the positions and descriptions of WBS codes are the same in the source estimates, their positions are the same in the merged estimate. If the WBS codes do not match, but their positions do not conflict, their positions in the merged estimate are the same as in the source estimates.

If positions of the codes conflict, the codes in the new estimate will be placed in the next available position.

- In the **Edit Database Items** window, you can now link prices on the Other and Subcontractor columns, not just on Labor, Equipment, and Materials.

Thank you for this suggestion, Travis M.

- In the **Edit Database Items** window, you can easily move from the items grid at the top of the window to the Item Details tabs, and back again, using just the keyboard. (
  - Select an item in the items grid and then press [Ctrl] + [↓] to move to the Item Details **Pricing** tab.
  - To move back to the items grid, press [Ctrl] + [↑].

Thank you for this suggestion, Gary S.

- In the **External Report** window, on the **External Report Database Configuration** tab, there is a new **Estimate Grid Totals Source** option. Selecting this option makes the totals generated by the external report configuration available to the estimate grids in the **Estimates** window in the Estimating Management Console and in the **Manage Estimate** window in the Estimating application.

When you select the **Estimate Grid Totals Source** option for at least one external report database configuration, several new totals columns are available to add to the estimate grids. If more than one set of data has been generated, the grid displays the most up-to-date totals.

**Tip:** This feature is useful if you want to compare total cost information for several estimates—for example, if you want to choose the best estimate to use as an estimate template.

Thank you for this suggestion, Kevin E.

- The **Variance Report** and the **Comparison Report** now display the complete estimate name.

Thank you for this suggestion, Kerry E.

- Totals pages now print properly when you print reports 1 page wide.

Thank you for this suggestion, Travis M.

# New Features and Enhancements

Sage Estimating version 24.1 introduces the following significant features:

- **Estimating Management Console:**

- In the **Standard Database** window and in the **Estimates** window, you can change the order of the collapsible sections to suit your preferences, providing that the standard database or the estimate is not in Edit mode.

For details, see [Reorder sections in the Database Information and Estimate Information windows](#).

- To foster the consistent use of fields in estimates for your company, you can now mark estimate information fields as "recommended" in the Estimating Management Console. This consistency facilitates comparison and grouping on dashboards and in reports. For example, if you want to view projects by estimator, you can encourage users to fill in estimator information when setting up new estimates.

For more information, see [Mark recommended Estimate Information fields](#).

- In the **Security** window, check box columns in the **Roles**, **Users**, and **Features** grids are now labeled **Included**, indicating more clearly the effect of a selection in these columns.
- We added the **AddonTotal** column to the **[Report].[Totals\_v1]** view in the estimate database and the tables with the same name in the report design database and external report database.
- The following new columns are available to show on the estimates grid:
  - Active standard database
  - Crew pricing method
  - Report hours
  - WBS definitions (prefixed with D: Detail, I: Item, or T: Total)
  - Recommended field status

Also, if you select the **Estimate Grid Totals Source** option on the External Report tab, you can display the following additional columns:

- Addon total
  - Equipment crew hours
  - Equipment person hours
  - Equipment total
  - Grand total
  - Labor crew hours
  - Labor person hours
  - Labor total
  - Material total
  - Other total
  - Subcontract total
  - Total
  - Totals external report database name
  - Totals generated on
- The estimates grid now includes the estimates that are contained in subfolders when you select a branch in the estimate catalog that has subfolders with estimates.
  - We relocated database version information to the status areas below the information panes, together with other database metadata.

For more details, see "View database versions in status areas in the Estimating Management Console " (page 11).

- In the **Security** window, we added **Created By** and **Created Date** columns to the Users grids.
- In the **Estimating Options** window, under **Sage Estimating Application > General** options, we renamed the **Show All Phases** option to **Show All Phases node** to make the purpose of the option more clear. (When you select the node, Estimating displays all the items from all the phases in the Items grid.)
- **Managing estimates:**
  - In the **Estimating Information** window, under **Company Information**, we added an email field for each company contact.
  - When you create a new estimate or duplicate an estimate, you can browse more easily to a target branch in the **Open Estimate Branch** window by using the expand and collapse buttons above the estimate tree.
  - In the **Export Estimates** window:

- If you use the shortcut menu to export estimates from the Estimate Catalog, the display in the Export Estimates window jumps to the first branch and the first estimate selected in the catalog.
  - If you select **all** the estimates in a branch, the branch folder is selected automatically.
  - Also, if all the branches were collapsed in the Estimate Catalog, they are collapsed in the Export Estimates window.
  - If you use the Export button on the toolbar to export estimates, no estimates are preselected in the Export Estimates window.
- In the **Import Estimates** window (in the Estimating Management Console and in the Estimating application), imported estimates are now saved to the **All Estimates** branch by default, unless you specify a different branch to which to save the estimates.
- **Estimating Reports:**
    - You can now use **Alternate status** as criteria to sort results on most spreadsheet reports and, if you select **Alternate status** as the primary sort option for a spreadsheet report, you can select a range of alternate statuses to include on the report.
  - **Other improvements:**
    - You can set up alternate statuses for a standard database that you can apply to estimates, later, saving you time and helping to ensure consistency across estimates.  
For more information, see [Set up alternate statuses for a standard database](#).
    - After installing Estimating, when you use the **Configuration Wizard** to specify an estimates database on the Data Server tab, the wizard supplies a unique default name for the estimate database, which you can accept or change.
    - You can again edit the **Sub Cost** and **Sub Cost Unit** for an item in a bid grid.
    - We retired the old **Edit Item** dialog in favor of the enhanced, more flexible **Edit Items** window that we introduced in version 23.1.
    - If you create your SQL Server instance outside the Estimating installation process, you can install training data from the Configuration Wizard.  
When you use the **Create an Estimates Database** window in the Configuration Wizard to create an estimate database, select the option to install training data.  
For more information, see [Install training data from the Configuration Wizard](#).
    - On the Estimating **Help** menu, the **Online Community** link now takes you to the Sage Construction & Real Estate Community Hub. The hub includes a link for the Sage Estimating General

Discussion forum and for Estimating announcements, where you can read the latest news, updates, and information for Sage Estimating.

## Mark recommended Estimate Information fields

In the Estimates window in the Estimating Management Console, you can identify fields that estimators and other users should fill in by marking them as recommended fields.

When you specify recommended fields for any estimate, the same recommended fields apply to all estimates.

**Note:** You must be assigned to a role that provides Edit global settings access before you can set recommended fields.

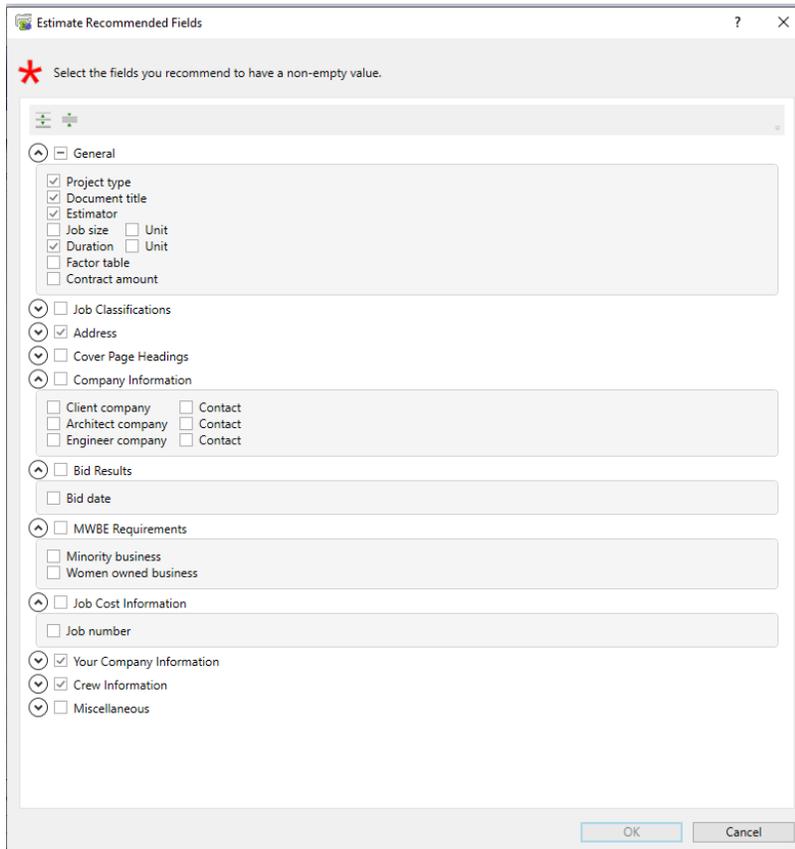
### To mark recommended fields:

1. In the Estimating Management Console, open the Estimates window.
2. From the Estimates Catalog, select any estimate.

**Note:** Do not select the [Edit] button or you will not be able to select the asterisk button in the next step.

3. Select the asterisk (  ) button.

The Estimate Recommended Fields window opens, as shown here:



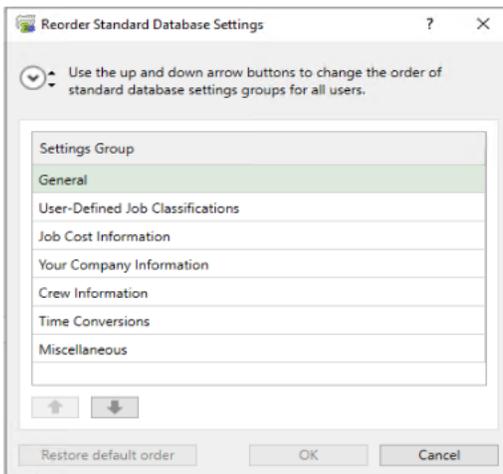
4. Select the check boxes beside the fields you want to mark Recommended.
5. When you finish selecting recommended fields, select [OK] to return to the Estimate Information window.

**Notes:** After identifying recommended fields, Estimating displays the following visual indicators to remind users to fill in those fields in each estimate:

- Labels for recommended fields include an asterisk.
- Recommended fields are outlined if they are blank.
- Group labels contain double asterisks if at least one recommended field in the group is blank.
- On the **Estimates** grid, a column heading with double asterisks indicates that there is at least one blank recommended field in the column for an estimate displayed in the grid.
- Asterisks also signify recommended fields in the **Show/Hide Columns** dialog box.

## Reorder sections in the Database Information and Estimate Information panes

In the Estimating Management Console, in the Standard Database window and in the Estimates window, when the standard database or the estimate is *not* in Edit mode, a Reorder Settings (⚙️) button is available. Clicking the button opens a new **Reorder Standard Database Settings** window, or **Reorder Estimate Settings** window, where you can change the order in which groups of fields appear, as shown here:



For more information, see the Estimating help.

## Install training data from the Configuration Wizard

In the **Configuration Wizard**, if you use the **Create an Estimates Database** window to create an estimate database, you can select a new **Install training data** check box, which installs several training companies.

This option is available only if you create a SQL Server instance separately from the Estimating installation. If you use the option to install SQL Server Express during installation, the option to install training data is not available.

**Note:** If no address book exists when you install training data, Estimating creates 2 address book databases: an address book for training data and an empty one to use when you finish using the training data. If an address book exists, Estimating does not create an empty one.

## Set up alternate statuses for a standard database

You can use a new **Select/Edit Database Alternate Statuses** window to define a set of alternate statuses for your standard database. Then, you can use these statuses in a variety of estimates. Having the statuses available for selection in the standard database can save you time and helps to ensure consistency across your estimates.

To add, edit, or delete database alternate statuses, you use the **Edit Database Alternate Statuses** window in the Estimating program. Open the window in one of the following ways:

- **If no estimates are open:**
  1. Make sure that the standard database to which you want to add alternate statuses is open.
  2. On the ribbon, click the **Advanced** tab, and then click **[Statuses]**.
  3. Add, edit, or delete statuses as you would for an estimate.
- **If you have at least one estimate open:**
  1. Make sure that the standard database to which you want to add alternate statuses is open.
  2. On the ribbon, click the **Advanced** tab, and then click **[Statuses]**.
  3. Click **[Databases]**.
  4. Click **[Edit]**.
  5. Add, edit, or delete statuses as you would for an estimate.

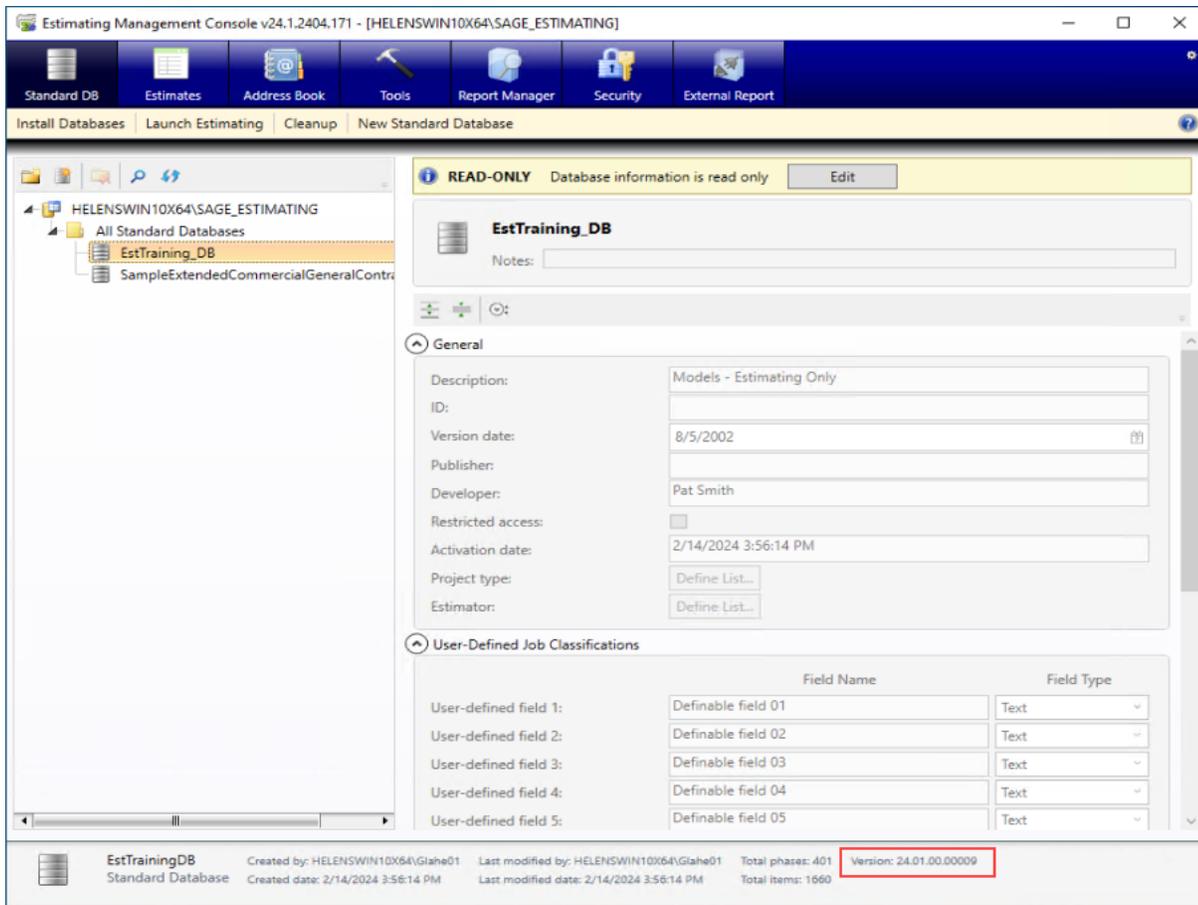
To assign existing database alternate statuses to the current open estimate, open the **Select Database Alternate Statuses** window, as follows:

1. On the ribbon in the Estimating program, click the **Advanced** tab, and then click **[Statuses]**.
2. Click **[Databases]**.
3. Hold down the **Ctrl** key as you select the row headers for the statuses you want to assign to the estimate.
4. Click **[Select]**.

For more information, see the Estimating help.

## View database versions in status areas in the Estimating Management Console

When you select a standard database in the Standard Database window, you can see the standard database version in the status area, together with other database metadata, such as the Created by date, as shown here:



In previous versions, the version number was located by itself inside the pane.

Similarly, we have relocated the estimates database version to the status area in the Estimates window.

# Fixes Since the Previous Version

Version 24.1 includes the following fixes:

- **Estimating Management Console:**

- When you run an integrity check on a database that is integrated with Sage Job Cost, you no longer receive an error saying that a valid cost code is not in the list of valid cost codes,
- For estimates you create while one of the **Default allow existing users** options to view or edit estimates is turned on, individual access rights are working properly when you turn permission on or off for a user.
- In the **Estimates** grid in the Estimating Management Console, you cannot place a column between columns that should stay together, such as the **Duration** and **Duration unit** columns.

Similarly, you cannot move only one column of a pair of columns. For example, if you try to move the Job size column by itself, Estimating will move the Job unit column, also, to keep the pair together.

- **Reports:**

- The **Variance Report** and the **Comparison Report** display the complete estimate name.
- When you preview or print the **Spreadsheet Report** for an estimate that includes a zero takeoff quantity for an item, the information for the item is displayed in a properly sized font.

- **Spreadsheet:**

- When you perform certain operations to update estimates in the **Manage Estimates** window (such as opening, creating, moving, renaming, or deleting an estimate or a branch), Estimating updates the Estimate Catalog pane.

Also, when you merge or duplicate estimates, the resulting new estimate appears in the Estimate Catalog without your having to close and then reopen Estimating or use the Refresh button to update the pane.

- **Item Takeoff** no longer closes unexpectedly when you add a missing rate to the rate table.
- When you add a new item to the database during item takeoff, the added items appear correctly in the items list.

- In the **Estimate Catalog**, you can use keyboard shortcuts (such as **Ctrl+C** and **Ctrl+V**) to copy or cut and paste estimates from branch to branch and manipulate text in the Search box.
- On the **Alternate Summary**, allocated addons are no longer calculated twice for alternates that do not have an Included status on the spreadsheet.
- During takeoff, when you enter a negative takeoff quantity, labor and equipment hours are properly displayed as negative amounts.
- In the **Edit Items** window, you can clear item units.
- When you insert a one-time addon on the **Totals page** and then save the page to the database as a template, the addon is no longer duplicated when you return to the Totals page.
- **Miscellaneous:**
  - You may notice performance improvements as a consequence of improved indexing of several database tables.
  - Local help that is installed with Estimating is available again.

# Known Issues

## Checking in a Standard Database from the Database Editor Closes the Database for Concurrent Users

You can work on a Standard database in the Estimating Database Editor while other users perform takeoff using the same database in the Sage Estimating program.

When you try to check in the Standard database while other users have the database open, you receive a warning that if you continue to check the file in, there may be unpredictable results for the concurrent users.

If you continue to check the file in despite the warning, the Estimating program stops working for the other users. However, the data is not corrupted and the Estimating program is not damaged.

# Need help?

## How to Get Help

Get help by:	Recommendation*	To access:
Reviewing in-product help	View information about the current window as well as procedures for using Estimating.	Click the Help button or icon, or press [F1] to display the Help topic for that window.
Reading product documentation	View documents and reference material from the Estimating Product Documents website.	Visit the <a href="#">Sage Estimating Product Documents</a> page.
Searching the Knowledgebase	Search the Sage Knowledgebase, which provides 24/7 access to support articles as well as the latest software downloads and updates.	Visit the Knowledgebase at <a href="#">Sage Knowledgebase</a> .
Asking the community	Join industry peers, certified partners, and Sage pros online 24/7 at the Sage Community Hub—the best place to ask questions and share product experiences, tips, and tricks.	Visit the <a href="#">Sage Estimating General Discussion</a> forum.
Checking the latest product alerts	Keep up with the latest product information with Sage Estimating Announcements at the Sage Community Hub forum.	See <a href="#">Sage Estimating Announcements</a> .
Submitting a web ticket	Submit your issue directly to our support team using Online Case submission.	Visit the <a href="#">Sage Customer Portal</a> .
Exploring training options	Learn how to harness the full power of your software through videos and classes at Sage University.	Visit <a href="#">Sage University</a> . You can also get access to Sage University from the Estimating File menu by selecting <b>Help &gt; Sage University</b> .

\*Customer Service hours vary by product line. Access to some resources require an active Sage Business Care support plan.

## Submitting Enhancement Requests

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