

Estimating product selection guide



Sage Construction and Real Estate offers several construction estimating solutions to choose from. Not sure which solution is right for you? No problem; let us help. For starters, we're interested in learning more about your specific needs so we can ensure the best "estimating" fit for your company's operations.

Sage 100 Contractor Estimating Basic

Create accurate and more profitable estimates in minutes with Sage 100 Contractor (formerly Sage Master Builder) Estimating Basic. And because the Estimating Basic application is tightly integrated with the rest of the Sage 100 Contractor modules, once you win a bid, just a few mouse clicks allow you to generate budgets, subcontracts, purchase orders; schedule tasks; and much more—reducing duplicate data entry and jump-starting production.

Sage Estimating Standard*

Sage Estimating (formerly Sage Timberline Estimating) Standard combines key estimating efficiencies with all the ease and intuitive point-and-click, drag-and-drop technology available. Smart Assemblies employ built-in intelligence, prompting you for only the data needed to calculate quantities and costs for a given construction system, saving you considerable time during takeoff. And, get even more estimating muscle from prebuilt databases such as RSMeans or a number of other industry-specific databases.

Sage Estimating Extended*

The powerhouse of our estimating modules, Sage Estimating Extended offers you the most comprehensive package of advanced estimating tools. The software starts with the power of Sage Estimating Standard and adds even greater takeoff, analysis, and productivity capabilities. For example, use Model Estimating to generate conceptual estimates in a matter of minutes instead of hours by simply answering a series of basic questions about a project. Results are remarkably fast and accurate estimates with the ability to add details as more project specifications become available.

*Integrates with Sage 100 Contractor and Sage 300 Construction and Real Estate. See following chart for integration areas.

Please visit www.SageEstimating.com to get detailed information on the extensive array of estimating add-ons for Sage Estimating Standard and Extended.

About The Sage Group, plc

We provide small and medium-sized organizations with a range of easy-to-use, secure, and efficient business management software and services—from accounting and payroll to enterprise resource planning, customer relationship management, and payments. Our customers receive continuous advice and support through our global network of local experts to help them solve their business problems, giving them the confidence to achieve their business ambitions. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and entered the FTSE 100 in 1999. Sage has over 6 million customers and more than 12,700 employees in 24 countries covering the UK & Ireland, mainland Europe, North America, South Africa, Australia, Asia, and Brazil.

For more information about Sage in North America, please visit the company website at Sage.com. Follow Sage North America on Facebook, Facebook.com/Sage, and Twitter, Twitter.com/SageNAmerica.

Sage Estimating

The following is a detailed feature comparison among the three Sage Estimating offerings. Additional explanations can be found for each feature listed later in the document.

	Basic	Standard	Extended		Basic	Standard	Extended
Estimate management				Spreadsheet (cont.)			
Standalone estimates	●	●	●	10-level spreadsheet			●
Explorer estimate management		●	●	Move-copy section to new WBS code			●
Takeoff				Adjust range of values			●
One-time items	●	●	●	Subcontractor bid grid			●
Item takeoff	●	●	●	Cuts and adds			●
Reprice estimates	●	●	●	Adjust job totals and spread variance			●
Quick takeoff		●	●	Support multiple currencies			●
Smart Assemblies™		●	●	Work breakdown structure library			●
• Review mode		●	●	User-defined work breakdown structure codes		1	40
Audit trail		●	●	Spreadsheet sequences		5	7
Model Estimating			●	Reporting			
Crews, resources, and rate tables			●	Summary and detailed level reporting	●	●	●
One-time crews			●	Customized reporting—control of type styles, sizes, bolding, header/footer	●	●	●
Spreadsheet				Create PDF files of estimate reports	●	●	●
Unlimited number of spreadsheet layouts	●	●	●	Export to Excel®	●	●	●
Customizable spreadsheet appearance	●	●	●	Allocate indirect costs to direct costs		●	●
Specification notes	●	●	●	Report sort sequences		●	●
Totals window	●	●	●	Bill of materials reporting		●	●
Autoscan for incomplete items	●	●	●	Spreadsheet reporting		●	●
User-definable mark-ups		●	●	Cost variance and comparison reporting			●
Estimate overlines		●	●				
Combine assembly feature		●	●				
Real-time autosave		●	●				
Multiple open estimates		●	●				

Sage Estimating

	Basic	Standard	Extended
Database			
Electronic price book updating	●	●	●
User-defined formulas	●	●	●
Auto add items to database		●	●
Formula variables with min/max and default		●	●
Advanced markups		●	●
Cost index-geographical repricing		●	●
Multiple prices on the item		●	●
Multiple productivity factors on the item		●	●
Secondary item sort		●	●
Indexed search capabilities in item lists		●	●
Merge database models			●
Uses same parts database as accounting/inventory	●		
Item cost categories	1	5	5

	Basic	Standard	Extended
Interfaces and other options			
ODBC compliant	●	●	●
Digitizer		●	●
Viewer		●	●
Cut and Fill		●	●
Industry knowledgebases/databases		●	●
Scheduling Integration (Microsoft Project and Primavera)		●	●
RSMeans		●	●
Buyout		●	●
Digital Takeoff Integration			
• Planswift for Sage	●	●	●
• ePlan Takeoff (On Center's On-Screen Takeoff Integrator)		●	●
• eTakeoff Dimension		●	●
Sage 100 Contractor and Sage 300 Construction Integration			
• Budgets	●	●	●
• Change orders	●	●	●
• Proposals	●		
• Purchase orders	●		
• Subcontracts	●		
• Request for proposals	●		
• Work orders	●		
• Service work orders	●		

Sage Estimating

Estimate management

Standalone estimate

Standalone estimates can be created using multiple databases and viewed independently from their corresponding databases.

Explorer estimate management

Explorer can help you easily organize, manage, and analyze hundreds of estimates. Locate any budget in your system instantly—whether current or archived—through Explorer’s master estimate list. Tools for cross-estimate analysis and bid schedule management are also available.

Takeoff

One-time items

One-time items can be used to add specialty items to the estimate without cluttering up the database. You can also choose to add one-time items from the estimate to the database automatically. The process allows you to accept or change the proposed item code as well as change other information about the item before you add it.

Item takeoff

Item takeoff lets you work with a group of items before they are copied to the spreadsheet. You’re allowed multiple takeoff passes for the same items and can even save a group of items as an assembly, significantly aiding in the database building/maintenance process.

Reprice estimate

Reprice an estimate by a percentage or using database prices to keep estimate prices up to date and in line with your current database prices.

Quick takeoff

Quick takeoff is a fast, easy way to build an estimate. Just drag items from the database directly to the spreadsheet.

Smart Assemblies

Smart Assemblies takeoff saves time by letting you select all the items of a wall, concrete slab, or other building component in one step.

- Review mode gives you an easy way to review or make adjustments to multiple passes, before or after accepting the assembly takeoff to the spreadsheet.

Audit trail

Audit trail provides a detailed breakdown of every item/assembly takeoff so you can verify takeoff quantities (including multiple passes), unit prices, amounts, and much more.

Model Estimating

Model Estimating produces conceptual estimates in minutes simply from your responses to a series of straightforward questions about your project. Model Estimating nests related items and assemblies into a single model to simplify the estimating process.

Crews, resources, and rate tables

Crews and resources allow you to set up an unlimited number of crews, which can be automatically priced. Rate tables assigned to the estimate determine what labor and equipment prices apply.

One-time crews

One-time crews can be set up as you do takeoff. This allows users to fine-tune costs by adjusting labor and equipment resources required for the task.

Spreadsheet

Unlimited number of spreadsheet layouts

Unlimited number of spreadsheet layouts can be used to customize the spreadsheet’s appearance to meet your special takeoff and reporting needs.

Customizable spreadsheet appearance

Customizing the spreadsheet appearance is possible using different type styles and sizes, bolding, and color highlighting. Changes to column order and column headings are also quickly and easily made.

Specification notes

Specification notes at all spreadsheet levels let you attach notes to any item, phase, division, assembly, location, and so on. Notes also print on reports.

Totals window

Totals windows can be opened directly from the spreadsheet, allowing you to view, manipulate, and edit information shown on the totals page such as subtotals by category, markups, and total cost per unit.

Autoscan for incomplete items

Autoscan for incomplete items makes it easy to locate and finalize items in the estimate that are incomplete.

User-definable mark-ups

User-definable markups, such as overhead, profit, bond, and insurance, can be added to each estimate as necessary and customized on an estimate-by-estimate basis.

Estimate overlines

Estimate overlines enable the display of add-ons, totals, and grand totals at the group, phase, and item levels.

Combine assembly feature

Combine “matching” assemblies makes estimate review much easier during the revision or final stages of estimate creation.

Real-time autosave

Real-time autosave eliminates the risk of losing estimate information due to power surges or outages. The spreadsheet resides on your hard drive, so you don’t have to remember to keep saving your work.

Sage Estimating

Multiple open estimates

Multiple estimates open at once allows you to compare similar estimates on screen and even jump-start new estimates by copying parts and pieces from one estimate to another.

10-level spreadsheet

The 10-level spreadsheet feature groups items and determines the order in which they appear both onscreen as well as in a number of estimating reports.

Move-copy section to new WBS code

Move/copy can be used to move or copy items, or a whole section of the estimate, from one area to another. Move/copy is a huge time-saver when estimating similar work such as “like items” on additional floors in a building.

Adjust range of values

Adjust column feature provides a variety of options to modify quantities, amounts, and prices within a range of marked cells at one time. Adjustments are tracked and can be easily undone.

Subcontractor bid grid

Subcontractor bid grid makes it simple to store, compare, and select subcontractor bids by item or category.

Cuts and adds

Cuts and adds allows you to apply last-minute price changes to your estimate and spread costs in a variety of ways.

Adjust job total and spread variance

You can change the total cost of a job in the Totals window and spread that amount back to the estimate. This is useful for negotiated jobs when you want to bring the estimate as close as possible to a predefined price. Estimating calculates the new cost per unit and shows the variance (difference between the old and new totals).

Support multiple currencies

If you perform work or source materials and/or equipment outside of the U.S., Sage Estimating allows you to easily convert and display both currencies using spreadsheet layouts and manipulation.

Work breakdown structure (WBS) library

The WBS library stores preestablished WBS codes for instant retrieval during takeoff.

User-defined work breakdown structure codes

User-defined WBS codes can be assigned to estimate items, allowing you to organize your estimate in a variety of ways (for example, by bid item, cost code, estimator, and so on).

Spreadsheet sequences

Spreadsheet sequences allow you to re-sort and provide different views of the estimate instantly. You can view the estimate by phase/item, takeoff sequence, assembly, location/phase, and user-defined WBS code (for example, subcontractor, CAD reference, material class, and more).

Reporting

Summary and detailed level reporting

Summary and detailed level reports let you determine how much or how little information prints for each report.

Customized reporting—control of type styles, sizes, bolding, header/footer

User-defined headers and footers, including text and graphics, can be created for all reports. In addition, complete control of type styles and sizes, bolding, background color, and scaling allows you to customize the appearance of your reports for presentation purposes.

Create PDF files of estimate reports

PDF files of estimate reports can be created for improved communication, information sharing, and estimate security.

Export to Excel

Export estimates or estimate reports using a simple and intuitive export process. Exported data formatting is maintained (column and row alignment), making exports easy to read.

Allocate indirect costs to direct costs

Allocating add-ons is a way to bury the cost of certain add-ons without affecting the bottom line of your estimate. The costs remain part of the estimate but are spread across items instead of appearing as a separate total.

Report sort sequences

Report sort sequences give you complete control of the order in which report information prints.

Bill of materials reporting

Bill of materials lets you print material items from the estimate according to material classification.

Spreadsheet reporting

WYSIWYG (what you see is what you get) spreadsheet reporting lets you set up your spreadsheet to look just the way you like it, then print your custom layout as a spreadsheet report.

Cost variance and comparison reporting

Cost variance and cost comparison reports are powerful analysis tools you can use to zero in on the differences between estimates. Estimate comparison can be performed at any level of detail and at a variety of sort options.

Databases

Electronic price book updating

Electronic price book updating methods can be used to update database prices by category, by user-defined price code, by the cost index feature for prices in a specific geographic location, or from within the Buyout worksheet.

User-defined formulas

Build your own formulas using variables and formula tables you define. Each variable can have user-defined help, and each formula can include notes to document assumptions.

Sage Estimating

Autoadd items to database

Items (item description, waste factor, crew, labor, and so on) can be automatically added to the database from all or specific sections of your estimate.

Formula variables with min/max and default values

Formula variables allow preset minimum, maximum, and default values to help prevent input errors during takeoff. Each variable can include user-defined help to aid the estimator during takeoff.

Advanced markups

Advanced markups can be used to set up and track anything from bond calculations that include step tables to material sales tax, labor and equipment surcharges, profit, overhead, and more.

Cost index—geographical repricing

Cost index automatically generates or reprices estimates based on the geographic location of the project.

Multiple prices on the item

Up to 20 price levels may be stored in the database for a single database item. The pricing method can be changed during or after takeoff.

Multiple productivity factors on the item

Up to ten labor productivity factors can be used to determine the labor unit for a single database item.

Secondary item sort

Items in the database can be sorted using secondary items. New sort criteria can include WBS code, job cost phase, and more.

Indexed search capabilities in item lists

Find items through an “index search” of the item code or item description.

Merge database models

Model files can now be merged using similar functionality that applies to other common merged files.

Uses same parts database as accounting/inventory

Parts and assemblies flow through entire system, from Estimating to Inventory to Service Receivables and Accounts Receivable. The same parts used for estimates automatically get updated in inventory as they are used on jobs and service work orders, then replenished.

Item cost categories

The number of categories available on a database item is five, providing a tremendous amount of flexibility when pricing out “special” items. One example might be the need to price not only the cost associated with a particularly large piece of equipment but the setup or positioning costs as well as freight charges to get it there.

Interfaces and other options

ODBC

ODBC lets you link data between applications with different file structures, as long as both applications have an ODBC driver.

Digitizer

Digitizer streamlines takeoff of paper blueprint dimensions and allows you to create a customizable dimension list including the name, quantity, and image associated with calculations. Save, store, print, or send values to a Sage Estimating spreadsheet automatically.

Viewer

The Viewer allows team members to view and print estimates without having to install or have a licensed use of the estimating software. No editing capabilities are allowed through the Viewer.

Cut & Fill

Cut & Fill provides quick and accurate earthwork estimates.

Industry knowledgebases/databases

A number of industry databases are available to choose from. Depending upon your specific needs, you choose the database that's right for you.

Scheduling Integration

(Microsoft Project and Primavera)

Estimate information can be shared directly with Primavera and Microsoft Project, jump-starting the scheduling process.

RSMeans

An integrated version of the RSMeans database pricing is available and updated on an annual basis for use with Sage Estimating.

Buyout

Buyout automates the entire RFQ process including RFQ generation/distribution, quote analysis, vendor selection, and PO generation.

Digital takeoff Integration

A number of digital takeoff solutions are available allowing counts and quantity takeoffs to be generated directly from electronic drawings for immediate use in your estimates.

Sage 100 Contractor and Sage 300 Construction Integration

- Standard job setup and exports are available for budgets, proposals, and change orders.
- Advanced job setup and exports are available for POs, subcontracts, RFPs, work order, and service work orders.

For more info, visit: Sage.com
or contact us at 866-996-7243