

Estimating, Specifying and Reporting

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Using This Guide

Click on a section title in the Contents list to jump to that section.

Use keyboard shortcuts to return back here.
On a Mac it's fn+Left, on a PC it's Ctrl+Home.

Updating The Software

This guide describes EstiMac and EstiPC **3.09**. To check which version you're currently using...

- EstiMac : click menu EstiMac / About EstiMac
- EstiPC : click menu Help / About

You can update free of charge if you're using an older version. For full details, see...

- [How to Install or Update EstiMac](#)
- [How to Install or Update EstiPC](#)

Learning By Example

Open EstiMac or EstiPC and then click menu File / Open Example.

The example shows how a typical project is set up and demonstrates most of the features of the software.

Getting More Help

Please see our other Quick Start Guides...

- [Purchasing](#)
- [Client Invoicing](#)

For additional detailed Guides on specific topics, click the links on the right side after each section or see the web pages...

- [EstiMac Guides](#)
- [EstiPC Guides](#)

Alternatively, email us at...

- support@estimac.com
- support@estipc.com

Please tell us if there's something in this guide you don't understand. We'll try to improve it.

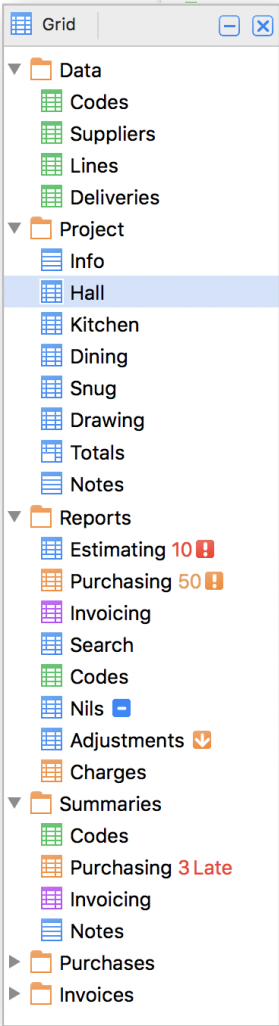
Finding Your Way Around

The Toolbar Buttons are always visible at the top.

The Document Selection drop-down lets you choose what to Preview, Print, PDF or Email. Different documents are available from different Screen Pages.



Full Client Estimate
Brief Client Estimate
Office Worksheet



The Project Grids are where most of the content is entered in a series of Grid Lines.

Enter all information into the project, both client visible (quantities, descriptions, prices) and client confidential (suppliers, details, costs, markups, notes).

The Client Estimate and Office Worksheet documents are generated from the content you've entered, showing the appropriate information.

Qty	Unit	Description For Client	Details For Office	Codes	Unit Price	Total Price	Adj	Inv
		Hallway						
		Furniture						
1		Console Table with stone top and iron base	Rectangular Console Table, TO4 170x45x76cm Base to be weathered iron, top blue stone	FN 888 ADAM 26/05/17	1,850.00	1,850.00	30%	2,405.00
1								150.00
1								100%
1								100%
2								731.66
Grid Totals					7 Lines	2,666.92	669.74	3,336.66
Full Client Estimate						2%	25%	2%
Project Totals					145 Lines 15 Grids	69,434.78	24,306.14	93,740.92
						8%	35%	10%

Line Image Purchasing Invoicing

Page Breaks: Client Estimate, Office Worksheet, Client Report, Contractor Report

Codes: ACC Accessories, BED Beds, BTH Bathrooms, Fittings, C Curtains, Blinds, Shutters

Adjustment: None, Discount, Commission, Margin Share

Nil Values: Nil Cost, Nil Markup, Nil Price, Hidden


File - /Images/Dining/12 Seat Dining Table - 3200x1100mm.png

Browse Clear

Image Position: Below


Max Image Width: 90 mm

If this is left blank the largest possible width will be used.




The Left Side Panel lets you select the Project Grids and other Screen Pages.

The Lower Panels let you set options and details for the current Grid Line or several selected Grid Lines. Use the Line, Image, Purchasing and Invoicing selection buttons to swap between the different Lower Panels.


 [Example Client Estimate PDF](#)


The Client Estimate is a word processor style document excluding client-confidential information.

 [Example Office Worksheet PDF](#)

The Office Worksheet is a tabular style document including all information.

Starting And Saving A New Project

 EstiMac and EstiPC normally open with an empty project. If you already have the Example project or another project open, click the New Project button or the File / New menu to start a new one.

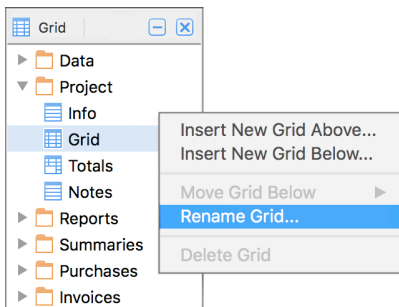
 Click the Save Project button or the File / Save menu to save the new project. The first time you save you'll be prompted to select a folder and enter a name for the project.

Keep saving as you build up the project. You'll see a warning if you don't save for ten minutes.

Dividing A Project Into Grids

A new project contains just Info, Grid, Totals and Notes pages in the Project folder in the left side panel.

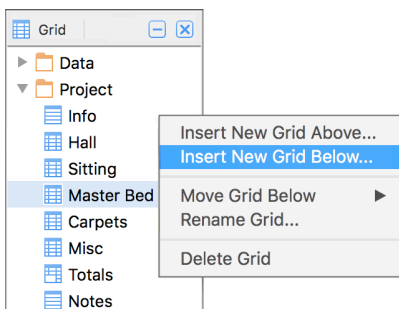
Start by deciding how to divide the project into manageable sections, typically rooms of a property. This can be modified later so don't worry too much about getting it right first time. A Project Grid is created for each section, where the content is entered.



Click on Grid in the left side panel then click on the Grid button, or control-click (on a Mac) or right-click (on a PC) on Grid. Enter a new name for the room or section in the popup box. Keep this name short or abbreviated to optimise the layout of the screen.

Enter a longer and more descriptive name in the Description For Client column in the very top line of the grid. This is the Grid Title line. Use the enter key to add extra Grid Title information for the client.

Qty	Unit	Description For Client	Details For Office
		Entrance Hall Ground Floor - Front of Property	



Now add some more grids. Right-click or control-click again on the renamed grid in the left side panel and select Insert Grid Above or Insert Grid Below.

Again, enter a short or abbreviated name for the left side panel in the popup box, and something longer and more descriptive in the top line of the newly added grid.

Repeat this procedure for all the other grids that you want to use.

Right-click or control-click on a grid and select the Move Grid Below or Rename Grid option to adjust the grid order or grid names.

[→ Opening Grids - Detailed Guide](#)

Entering Grid Lines

Now start entering the content for each grid line...

(not all columns are shown here)

Qty	Unit	Description For Client	Details For Office	Unit Cost	Total Cost	Markup	Unit Price	Total Price
		Master Bedroom						
1		Curtain making charges	Blackout lining omitted as blackout roller blind now added	760.00	760.00	50%	1,140.00	1,140.00
14.00	metres	Fabric - cream linen	Code. Colour. Repeat. Width. Composition. Origin. Fire Code.	70.00	980.00	66.67%	116.67	1,633.38

- Description For Client is for all the information you want your client to see.
- Details For Office is for your own information such as product codes, information from suppliers and your own notes. The client won't see this.
- Quantity is for the number of items, length of material, area of surface, etc. Enter 1 for single items.
- Unit is for Metres, Square Metres, Rolls, Sets, etc, where appropriate. Leave blank for single items.
- Unit Cost is the amount you are charged by your supplier for each item, metre, set, etc.
- Unit Price is the marked up amount you charge to your client for each item, metre, set, etc.
- Markup is the difference between Price and Cost, expressed as a percentage of Cost.

[→ Working In Grids - Detailed Guide](#)

Using Automatic Calculations

Unlike a spreadsheet, there's no need to set up formulae and summation ranges. It's all built in.

As you start entering Unit Costs and Unit Prices you'll notice that the Total Costs and Total Prices are calculated automatically for each line, based on the Quantity you've entered. If you enter a Markup you'll see Unit Price and Total Price are automatically adjusted. If you change the Unit Price you'll notice the Markup and Total Price are automatically adjusted. It's all very flexible.

Towards the bottom right you'll see that Total Cost, total Markup amount, average Markup percent and Total Price are automatically calculated for the selected grid and the whole project. This makes it easy to keep a watch on your total costs, profitability and price to client.

		Unit Cost	Total Cost	Markup	Unit Price	Total Price
Grid Totals	7 Lines		2,666.92 2 !	669.74 25%		3,336.66 2 !
Project Totals	145 Lines 15 Grids		69,434.78 8 !	24,306.14 35%		93,740.92 10 !

[→ Working In Grids - Detailed Guide](#)

[→ Calculators - Detailed Guide](#)

Checking Incomplete Line Warnings

As you start entering Quantity, Unit Cost, Markup and Unit Price values you'll notice little red warning markers appear, indicating an incomplete or missing specification.

▶ Data
▶ Project
▼ Reports
Estimating 11 !
Purchasing 51 !
Invoicing
Search
Codes
Nils
Adjustments
Charges

These red markers are automatically removed once a value is entered.

In the Reports folder in the left side panel, Estimating shows in brackets the total number of lines in the project where there is an incomplete specification. It acts like a 'To Do' list for the project.

Unit Cost	Total Cost	Markup	Unit Price	Total Price
!		!	!	

Click on Estimating and you'll see a listing of all the incomplete lines in the project. This can be very helpful in large projects where there are incomplete lines across several different grids.

Click on the little green links to the left of each report line to quickly jump to the corresponding grid line, where you can complete the information.

Grid	Qty	Unit	Description For Client	Details For Office	Unit Cost	Total Cost	Markup	Unit Price	Total Price
▶ Hall	1		Panel Mirror above console - to discuss with client	Panel Mirror with Antiqued Mirror Glass (size of mirror and panels to be confirmed)	!		!	!	
▶ Hall	1		Border Panel Mirror above console - to discuss with client	Border Panel Mirror with Antiqued Mirror Glass.	!		!	!	
▶ Kitchen	2	No.	Bronze Wall Lights	Riddle Wall Light - Brass & Black. Height: 350mm Width: 400mm	394.00	788.00	!	394.00	788.00

[→ Working In Grids - Detailed Guide](#)

Entering Prices Before Costs

If you don't know an exact Unit Cost (maybe you're waiting to hear back from a supplier), but you know the Unit Price you want to charge the client, you can enter that first.

You can return and enter the Unit Cost for the line once it is known. Incomplete line warnings are shown to remind you to do this.

If you try a preview of the Client Estimate you'll see that lines with and without entered Unit Costs are presented in exactly the same way. Your client won't notice any difference between accurately costed and marked up lines, versus lines where the exact cost is not yet known.

This can be useful for preparing a preliminary estimate or when working to a tight deadline.

When you subsequently enter Unit Costs, the previous Unit Prices remain fixed (unless you over-type them) as they will have been quoted to your client. Markups are calculated automatically.

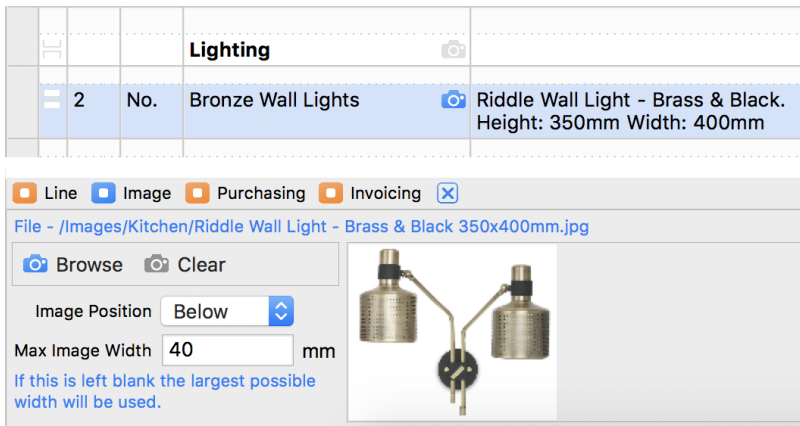
Unit Cost	Total Cost	Markup	Unit Price	Total Price
!		!	2,000.00	8,000.00
!		!	1,500.00	6,000.00

[→ Working In Grids - Detailed Guide](#)

Adding And Adjusting Images

To add an image, select a grid line then click on the Image panel button beneath the grid.

Click the Browse button and then find and select the image file you want to use. A preview of the image will be shown in the panel at the bottom of the page.



Images typically come from graphics software, web site downloads, scanners, digital cameras and phones. Crop, rotate, enhance and combine images using image editing software, then save permanent image files into a suitable folder. Images are not embedded within project files, they're just linked by reference to their file name and location.

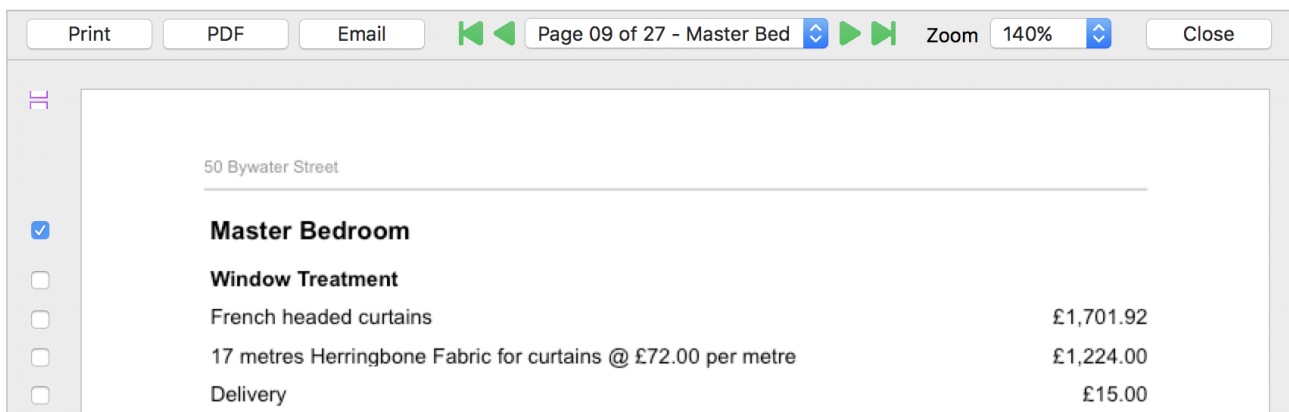
It's best to keep a separate folder for images used in each project. Locate this folder near to the project file. Browse into it from EstiMac or EstiPC to select the images. If you delete, move or rename individual images the links will be lost and you'll need to reselect the images. If you move or rename the folder where the project images are stored you can reselect it using the Images Folder Browse button on the Info page in the Project folder. This reselects all project images. Don't select images saved in temporary folders or on your desktop.

Set the Print Width to specify the size of the image on the Client Estimate. Set the Print Position option to make it appear Above, Below, Left or Right of the line text. For larger images (furniture, etc), Above or Below is usually best. For smaller images (fabric samples, paint colours, etc), Left or Right can be better. Experiment by setting different Print Widths and Print Positions then previewing the Client Estimate.

[→ Images - Detailed Guide](#)

Using Print Previews And Page Breaks

While working in a project grid, a Full Client Estimate, Brief Client Estimate or Office Worksheet can be previewed. With a report page selected, various Report documents can be previewed. Select the document from the drop-down at the top of the page then click the Preview button. A Print Preview window will appear showing the layout of the selected document.



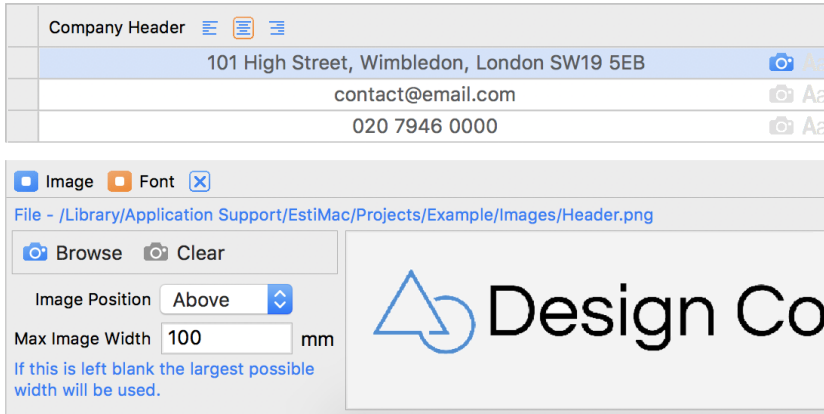
Use the green arrow buttons to move through the pages of the Print Preview, or click on the drop-down between the arrows to jump to a page directly. Set the Zoom percentage to adjust the view.

You can add and remove Page Breaks from within the Print Preview - you don't need to return to the Project Grid or Report first. Click on an unticked box in the left side margin to add a Page Break. The new page will be shown. Click on the ticked box at the top of a page to remove the Page Break.

[→ Inserting Page Breaks - Detailed Guide](#)

Setting Up A Company Letterhead

Click on Info in the Project folder to set up a Company Letterhead Header and Footer, Client Contact Details, Project Name and Reference and some Project Introduction text and images.



Enter your company's name, address, phone and email in the Company Header and / or the Company Footer. Enter your company registration and VAT number in the Company Footer.

For some lines, click on the Image panel at the bottom of the page to select an image for your company logo. Set the logo size and position, just like for the project line images.

You can set the font and size for each line of the Company Header and Footer. The alignment can be set to left, centre or right using the buttons at the top.

Try some print previews and modifications until you get it all looking exactly right.

[→ Project Template And Document Options - Detailed Guide](#)


Adding Client Contact Details

Enter a Project Name and Project Date, which will appear on the Client Estimate. Also enter a Project Reference, which will appear on Purchaser Orders to your suppliers and Office documents.

Client Contact Details		
Mrs Hilary Tait		Project Address:
Mole Hall		50 Bywater Street
Taunton Burgess		Chelsea
Hampshire		London
Project Name For Client	Project Reference	Project Date For Client
50 Bywater Street	123/BS	22/05/17
Project Introduction		
A proposal for the Interior Design and Decoration of 50 Bywater Street.		

Use the Project Introduction to add content you want to show on the first page of the Client Estimate to make a good first impression. Give an overall description of your proposals, list key points, add images of artwork, photographs, architectural drawings, scanned theme drawings or mood boards. Make it look good!

The Project Info page sets up the appearance of the first page of the Client Estimate. To see what's possible, have a look at...

 [Example Client Estimate PDF](#)

[→ Project Info - Detailed Guide](#)

Setting The Project Tax Rate

Click on the Totals page in the Project folder in the left side panel and you'll see a summary of the project.

The project Total Cost, Markup and Total Price are automatically calculated and updated as the project is built up.

Near the bottom right of the page is a percentage Tax rate (Value Added Tax or Sales Tax). Click on the percentage value to change it.

If you enter 0, then 0% and £0.00 Tax will be shown on the Client Estimate.

If you delete the percentage, and leave it blank, then no Tax percentages and amounts will be shown on the Client Estimate.

Project Totals	69,434.78	24,306.14	93,740.92		93,740.92
	8	35%	10		10
Project Fee					
Net Total					93,740.92
Tax		20%			18,748.18
Total					112,489.10

[→ Totals And Notes - Detailed Guide](#)

Selecting Multiple Grid Lines

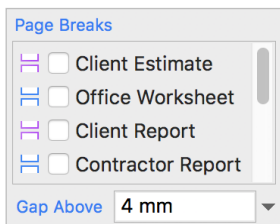
1			Seat Cushion for banquette between bookshelves
6.5	metres		Blue/Grey Fabric for banquette
3			Faux Fur scatter cushions
1.5	metres		Faux Fur for front
1.5	metres		Blue wool for back
2	No.		60cm x 60cm Plaid scatter cushions
1.5	metres		Plaid fabric for front of cushions
2	metres		Camel wool for back of cushions

Some actions can be performed on multiple grid lines at the same time. These actions include copying and deleting, setting gaps, codes, adjustments, nil values and markups, ordering and invoicing. Don't repeat these actions over and over again on the individual grid lines. Instead select multiple grid lines first then do it all in one go.

Click on the grey left edge of a grid line to select it. Scroll down if necessary, then click on the grey left edge of another grid line while holding down the Shift key to select a range of lines. Alternatively, or additionally, click on the grey left edges of other grid lines while holding down the Command key (on a Mac) or the Control key (on a PC) to select or de-select individual lines.

[→ Working In Grids - Detailed Guide](#)

Adjusting Gaps Between Lines




A 4mm gap is normally shown between each line in the Client Estimate. It may be more appropriate to reduce this, to imply a connection between adjacent lines, or increase it, to show a separation between sections. Just select a grid line then change the Gap Above value at the bottom left of the Line lower panel. Pick a preset gap from the list or type in your own value. Try a print preview to see the effect. If you select multiple lines first, you can set all their gaps in one go.

[→ Changing Document Content - Detailed Guide](#)

Inserting, Deleting, Copying And Moving Lines

If there's something you've forgotten to enter, additional empty grid lines can be added. Lines entered in error can be deleted.

 Just control-click (on a Mac) or right-click (on a PC) on a line and select Insert Empty Line or Delete Line, or use the Insert Line or Delete Line buttons.

Single or multiple lines can be cut or copied from a grid and pasted into a different line, a different grid or another project. First select a single or multiple lines, then control-click or right-click on a line and select Cut Lines or Copy Lines, or use the Cut or Copy button.



Move to the required grid and line then control-click or right-click and select Paste Line(s), or use the Paste button.

When you get to purchasing and invoicing lines, you'll find that purchased and invoiced lines can not be deleted without first removing them from the order or invoice. This is a deliberate safety feature. When purchased or invoiced lines are copied the order and invoice numbers are automatically removed.

It is, however, possible to move lines that have been purchased and / or invoiced. Lines can be moved within a grid or from one grid to another within the project.

First select a single or multiple lines then click on the menu Edit / Tag Lines. Then move to the grid and line where you want to relocate the selected lines and click on the menu Edit / Move Tagged Lines.

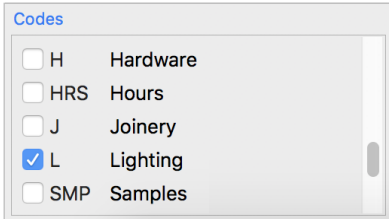
It's not necessary to insert blank lines first - the existing lines will be shifted down automatically.

[→ Edit, Format And Tag Grid Lines - Detailed Guide](#)

Selecting Codes

EstiMac and EstiPC include a number of standard category codes which you can assign to each line of a project. Click one or more codes in the lower panel to assign them to a line. Select multiple lines first to apply codes to all the selected lines at once.

Qty	Unit	Description For Client	Details For Office	Codes
2	x	Metal Box Wall Lights	Narrow Box Light, Clear Glass, Externally Glazed, Height: 365mm Width: 130mm Projection: 140mm	L
2	x	Light Bulbs	E27 60W max	L



Applying category codes may initially seem a little trivial, but you'll see many benefits as the project progresses. Selecting suppliers is simplified, as only those supplying that category are listed. The coded lines are also included in the Codes Summary, where the overall cost and overall price are automatically calculated and an average markup can

be checked. The coded lines can be included in the Codes Report where listing documents for clients, suppliers and contractors can be generated.

Codes can be a very flexible way of marking or categorising particular lines within a project. For example, you can set up codes to mark lines with estimated costs, lines needing final approval from your client, lines involving long delivery times, etc. Using the Codes Report, you can get a listing of all lines where one or more codes have been set.

Add your own codes from the Codes page in the Data folder in the left side panel.

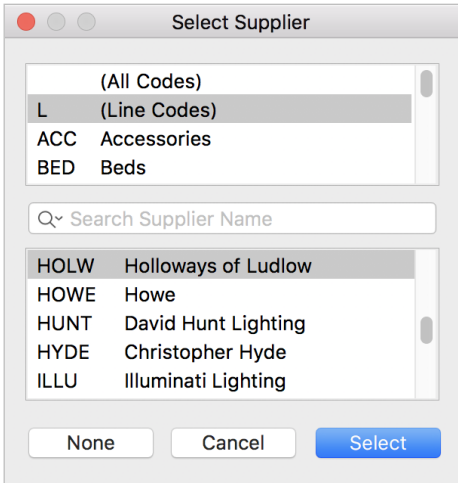
Click the Add New Code button at the top. Click on the red icon to the left of existing codes to edit their descriptions.

Codes are shared between all projects and between all users in a networked office, where it's good practice for one user to be responsible for managing them. Try to avoid setting up several similar codes for the same thing.

You can use punctuation characters at the start of the Code IDs to group types of code together, for example _PHASE1, _PHASE2, +TBA, +PROV, +EST, etc.

[→ Codes - Detailed Guide](#)

Selecting Suppliers



In many cases, as you add lines to the project you may already know which supplier you intend to use.

You can select the supplier by double-clicking in the Purchase column. A list of suppliers will be presented.

If you've already selected a category code for the line, only suppliers for that category will be listed.

Selecting a supplier as soon as you add in the line will simplify the process of enquiring about trade costs and raising purchase orders later in the project.

Add your own suppliers from the Suppliers page in the Data folder in the left side panel.

Click the Add New Supplier button at the top. Click on the red icon to the left of existing supplier to edit their details.

Suppliers are shared between all projects and between all users in a networked office, where it's good practice for one user to be responsible for managing them. Try to avoid setting up several variations of the same supplier.

For more information on purchasing, please see our Quick Start Guide...

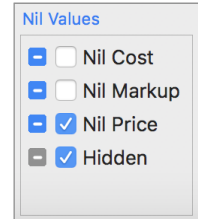
[● Purchasing](#)

[→ Preselecting Suppliers, Supplier Enquiries And Purchase Without Order - Detailed Guide](#)

Setting Nil Cost, Markup Or Price

As you enter grid lines, you'll notice incomplete line markers are shown where Cost, Markup and Price values have yet to be entered. Sometimes, nil or zero values may actually be required.

- Nil Cost may be required if you are charging design hours.
- Nil Markup may be required if you have agreed to supply the client with certain goods, services or deliveries at cost.
- Nil Price may be required where items have been purchased in error and can not be charged to the client but will still increase your costs and reduce your profit.



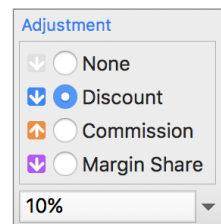
To set a Nil value, just select a grid line then click the option towards the right of the Line lower panel. A Nil marker will be shown in the grid line. If you select multiple lines first, you can set all their Nil options in one go.

If you set Nil Price for a line, you can also set Hide From Client to completely exclude the line from a Client Estimate. Without setting this option, 'Nil' is shown to highlight the situation to your client.

[→ Calculators - Detailed Guide](#)

Setting Discounts, Commissions And Shares

To show a discounted price just select a line then click the Discount option in the Line lower panel. Either pick a preset discount from the list or enter your own value. The discount will be shown in the grid line. If you select multiple lines first, you can set all their discounts in one go.



Total prices and markups for the grid and project are automatically reduced to take the discount into account. Discounts are automatically included as negative amounts in the Client Estimate.

Commissions can be set in a similar way but with the opposite effect.

They increase the prices and markups and are shown as positive amounts in the Client Estimate.

5.00 metres silk velvet @ £153.00 per metre	£765.00
Antique table bought at auction with client in attendance	£2,400.00
Commission @ 5%	+ £120.00

Margin Shares are a better alternative to Discounts. They're calculated by taking the margin between cost and price and sharing it between you and your client according to the selected percentage.

[→ Calculators - Detailed Guide](#)

Applying Project Fees And Discounts

You can add a fee to the project total. This can be either a fixed amount or a percentage.

Project Fee	15%	13,809.14
Net Total		105,870.06
Tax	20%	21,174.01
Total		127,044.07

Fees are set in the Totals page in the Project folder in the left side panel. To set a fixed fee or project percentage fee, click on the Project Fee box near the bottom right of the page.

Enter the percentage or fixed amount in the popup box.

The project fee appears at the end of the Client Estimate.

If a percentage fee is applied, it is automatically adjusted as lines are added to or removed from the project or prices are changed.

	£92,060.92
Fee @ 15%	£ 13,809.14
Net Total	£105,870.06
VAT @ 20%	£21,174.01
Total	£127,044.07

Alternatively, you can apply different fees, fixed amounts or percentages, to individual grids.

Grid	Title	Cost	Markup	Price	Grid Fee	Full Total
➔ Hall	Hallway	2,666.92 2%	669.74 25%	3,336.66 2%	500.50 15%	3,837.16 2%
➔ Kitchen	Kitchen	12,776.09	4,640.40 36%	17,416.49 1%	3,483.30 20%	20,899.79 1%
➔ Dining	Dining Area	5,164.60	998.91 19%	6,163.51	924.53 15%	7,088.04
➔ Snug	Snug Area	1,537.83 3%	1,099.42 71%	2,637.25 3%	263.73 10%	2,900.97 3%

Click the Grid Fee column for each grid summary line and then enter a percentage or fixed amount.

These grid fees appear at the end of the Client Estimate...

	Price	Fee	Total
Hallway	£3,336.66	£500.50 @ 15%	£3,837.16
Kitchen	£17,416.49	£3,483.30 @ 20%	£20,899.79
Dining Area	£6,163.51	£924.53 @ 15%	£7,088.04
Snug Area	£2,637.25	£263.73 @ 10%	£2,900.97
	£29,553.91	£5,172.05	£34,725.96
		VAT @ 20%	£6,945.19
		Total	£41,671.15

The project fee often represents the skill, experience and creativity of the designer, above and beyond the line-by-line markups which cover the procurement, handling, storage, installation and other project management costs.

Overall Project Discounts or individual Grid Discounts can be applied by entering negative Fee percentages or amounts. To set a fixed discount or project percentage discount, click on the Project Fee box near the bottom right of the page. Enter the negative percentage or negative fixed amount in the popup box, for example -10%. To set fixed discounts or percentage discounts for individual grids, click on the Grid Fee column and enter negative percentages or negative fixed amounts.

	£34,725.96
Discount @ 10%	£3,472.60
Net Total	£31,253.36
VAT @ 20%	£6,250.67
Total	£37,504.03

[→ Totals And Notes - Detailed Guide](#)

Showing Optional Columns

Click on any part of the columns header in a Project Grid or Report and a popup box will appear allowing optional columns to be shown.

- The Ref column can be used for line numbers or other references used in discussions with your client. Try to keep the content of this column very short, otherwise the layout of documents will be distorted.
- The Details For Office column can be temporarily hidden if you're working on a small screen and space is limited.
- The Details For Contractor column can be used to enter instructions for a builder, decorator or other sub-contractor. This lets you keep the Details For Office column for your own use.

● Optional Columns

Ref

Details For Office

Details For Contractor

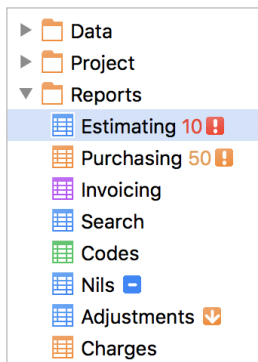
Budget Costs

Guide Prices

- The Unit and Total Budget Cost columns record the values initially entered into the Cost columns. This allows subsequent variations in Unit Cost and Total Cost to be monitored. When the Budget columns are shown, total variations between Budget Cost and actual Total Cost are shown for the Grid Totals and on the Project Totals page. Savings are shown in green while overspends are shown in red.
- Similarly, the Unit and Total Guide Price columns record the values initially entered into the Price columns. This allows subsequent variations in Unit Price and Total Price to be monitored. When the Guide columns are shown, total variations between Guide Price and actual Total Price are shown for the Grid Totals and on the Project Totals page.

Listing Lines In Reports

The Reports folder in the left side panel includes listings of grid lines that match certain criteria...



- The Estimating Report lists all grid lines where one or more of Quantity, Unit Cost, Markup or Unit Price is incomplete.
 - The Search Report lists all the grid lines where the contents of the Ref, Unit, Description For Client, Details For Office or the Details For Contractor columns match what's entered in the Search box.
 - The Codes Report lists all grid lines where one or more codes have been set. A code selection popup box is initially shown. This can be re-shown by clicking the Codes button at the top of the report listing.
- All Suppliers Code L Only
- The Nils Report lists all grid lines where one or more of Unit Cost, Markup or Unit Price is set to Nil.
 - The Adjustments Report lists all grid lines where a Discount, Commission or Margin Share is specified.

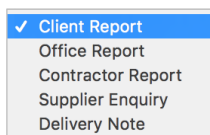
The Search Report, with nothing entered in the Search box, also provides a listing of every project line.

In some cases the layout of a Client Report for the full project may be preferred to the Client Estimate.

[→ Search Report - Detailed Guide](#)

[→ Codes - Detailed Guide](#)

Using Client, Office And Contractor Reports

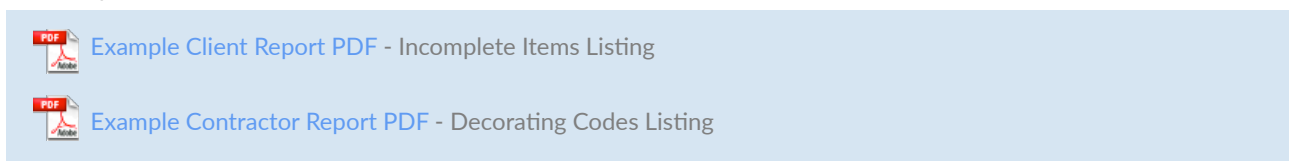


Client and Office Reports can be generated from most report pages and have a similar format to the Client Estimate and Office Worksheet.

A Client Estimating Report can be sent to a client to confirm which lines are not yet included in the total project price, possibly because a decision has not yet been made.

A Client Codes Report can show all the lines matching a certain category or criteria.

Contractor Reports can be generated from the Estimating, Search and Codes Reports. They are formatted as a worksheet and exclude all financial information. A Contractor Codes Report can be issued to a sub contractor to list all building works, for example.



[→ Contractor Reports And Delivery Notes - Detailed Guide](#)

Selecting Lines From A Report

You can select one or more lines from a report listing using the same technique as for selecting multiple grid lines. Click on the grey left edge of a report line to select it. Scroll down if necessary, then click on the grey left edge of another grid line while holding down the Shift key on your keyboard. This selects a range of lines. Alternatively, or additionally, click on the grey left edges of other grid lines while holding down the Command key (on a Mac) or Control key (on a PC). This selects or de-selects individual lines.

If one or more report lines are selected, only those lines are included in Client, Office and Contractor Reports. This can be used as a quick way of listing a few lines to show to a client or contractor.

[→ Search Report - Detailed Guide](#)

Setting Document Options

Beneath the Project Grids, Project Totals and various Reports, are options for each of the documents...

Client Report	<input checked="" type="checkbox"/> Grids	<input checked="" type="checkbox"/> Refs	<input checked="" type="checkbox"/> Images	<input checked="" type="checkbox"/> Prices	<input checked="" type="checkbox"/> Totals	<input type="checkbox"/> Include Tax
Office Report	<input checked="" type="checkbox"/> Grids	<input checked="" type="checkbox"/> Refs	<input type="checkbox"/> Contractors	<input type="checkbox"/> Budgets	<input type="checkbox"/> Guides	<input checked="" type="checkbox"/> Costs
Contractor Report	<input checked="" type="checkbox"/> Grids	<input checked="" type="checkbox"/> Refs	<input checked="" type="checkbox"/> Images	<input type="checkbox"/> Details	<input type="checkbox"/> Codes	<input type="checkbox"/> Purchases
Supplier Enquiry	<input checked="" type="checkbox"/> Grids	<input checked="" type="checkbox"/> Refs	<input checked="" type="checkbox"/> Images	<input checked="" type="checkbox"/> Descriptions	<input checked="" type="checkbox"/> Details	
Delivery Note	<input checked="" type="checkbox"/> Grids	<input checked="" type="checkbox"/> Refs	<input checked="" type="checkbox"/> Descriptions	<input checked="" type="checkbox"/> Details	<input type="checkbox"/> Contractors	

These options determine whether certain information is included or excluded from a document. Where appropriate, different options are shown for different documents.

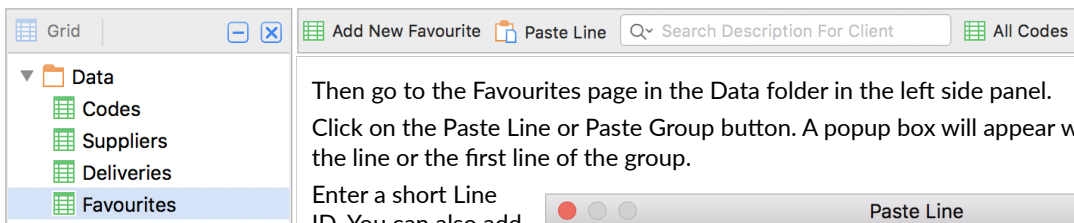
In most cases the effect of each option should be obvious. If not, just give it a try. Set or clear the option then try a print preview of the appropriate document to see what changes.

[→ Changing Document Content - Detailed Guide](#)

Saving Favourite Lines For Future Use

If you've entered grid lines or groups of grid lines that you want to use again in other projects you can add them to your Favourites Data.

First, select the line or all of the group, then click on the Copy button or the Edit / Copy menu.



Then go to the Favourites page in the Data folder in the left side panel.

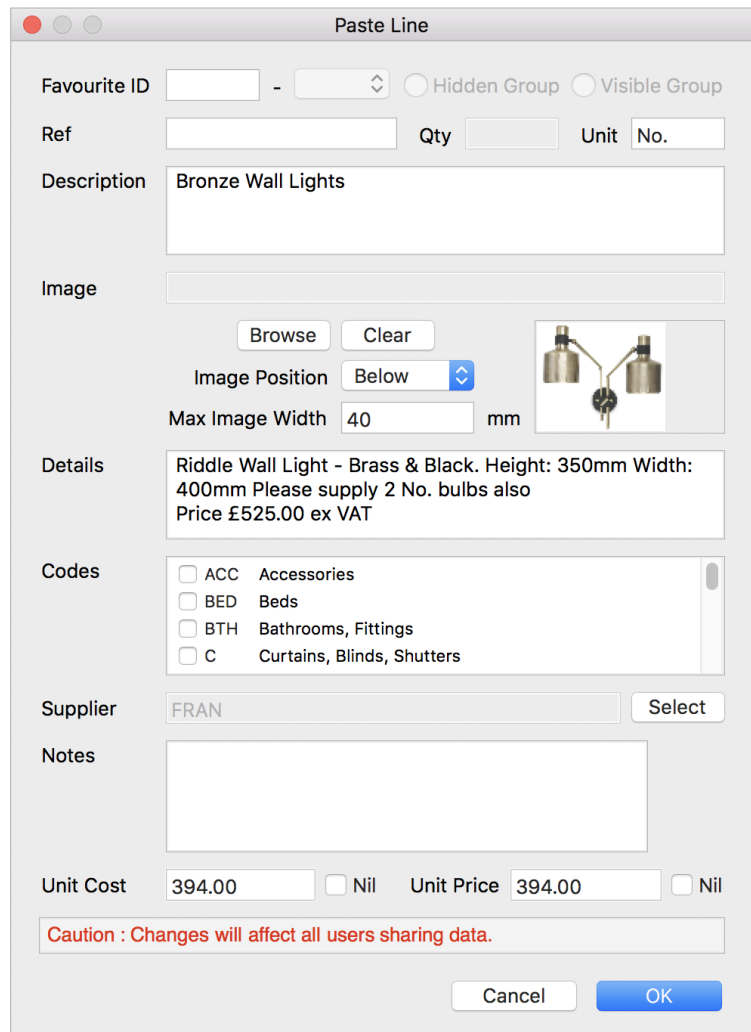
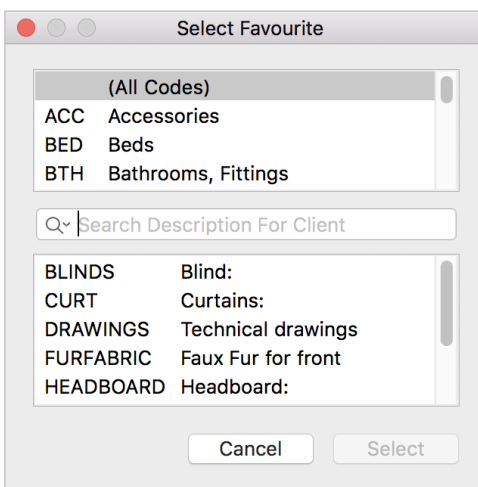
Click on the Paste Line or Paste Group button. A popup box will appear with information for the line or the first line of the group.

Enter a short Line ID. You can also add extra information or

remove anything that isn't appropriate for repeated use, for example fabric lengths in curtain treatments. Click OK to add the line or group.

You can then click on the red icons for individual group lines to modify the information.

Once you have set up data lines in this way, just double-click on the Description For Client column back in an empty grid line. You'll see a popup box allowing you to select of of the data lines. If you've set codes for the grid line, then only the data lines with the same codes will be listed.



Using the Favourites feature you can build up a project very quickly based on frequently used lines.

Favourites are shared between all projects and between all users in a networked office, where it's good practice for one user to take responsibility for managing them.

[→ Favourites - Detailed Guide](#)

Starting The Next Project

Once you're happy that your company header and footer and the project notes, terms and conditions are suitable for repeated use, you can create a template or starting point for subsequently created new projects. This information is then automatically loaded into the new projects.

Click on the File / Export / New Project Template menu. You can repeat this later if you make changes.

If you want to start a new project based on one that's already open, just click on the File / Save As menu and select New Project. Any purchasing or invoicing information will be excluded from the new project and you can add or delete lines or grids as appropriate.

[→ Project Template And Document Options - Detailed Guide](#)