



# Sage Estimating Essential v21.1

## Release Notes

July 2021

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# Version 21.1 Release Notes

This document provides important information about your Sage Estimating Essential 21.1 software. Read these release notes carefully before installing Sage Estimating Essential 21.1.

## 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 111616, 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 111616, available at <https://support.na.sage.com/selfservice/viewdocument.do?externalId=111616>.

### 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 must:

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 Essential version 21.1 is compatible only with version 21.1 of Sage 300 Construction and Real Estate, which Sage plans to release in the summer of 2021. If you integrate Estimating with Sage 300 Construction and Real Estate for Job Cost or Project Management, do not install Sage Estimating Essential version 21.1 until you install Sage 300 Construction and Real Estate version 21.1.
- 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 21.1 before you upgrade to this version.

# New Features and Enhancements

Sage Estimating version 21.1 introduces the following significant features:

- Estimating is now a 64-bit solution.
- Throughout the Estimating software and in help, units of labor are now described in a gender-neutral way.  
For example, when selecting settings for reporting labor hours, you choose between **Person hours** and **Crew hours**, and where previously you might have selected Man day, Man Hour, or Man month, now you select **Person day**, **Person hour**, or **Person month**.
- Integration with Sage 300 Construction and Real Estate Job Cost now takes place within Sage Estimating.  
For more information see [Improved Integration with Sage Timberline Estimating Job Cost](#).
- In the Estimating Management Console, you can import an address book that was exported from Sage 300 Construction and Real Estate.  
For more information, see [Ability to import a Sage Timberline Estimating address book](#).
- Estimating removes trailing spaces from WBS values.
- For the Estimating spreadsheet, you can resize the **Insert column** window.

## Version 21.1 Is a Modern 64-Bit Solution

Estimating is now a 64-bit solution, which provides a superior ability to handle large databases and process large amounts of data efficiently.

Also, Estimating now supports more recent versions of SQL Server software:

- It comes with SQL Express 2017 (rather than SQL Express 2012).
- It supports SQL Server 2019.

## Improved Integration with Sage 300 Construction and Real Estate Job Cost

Because Sage Estimating version 21.1 is now a 64-bit application, it can no longer display Sage 300 Construction and Real Estate windows, which are written for 32-bit Windows. Consequently, Estimating has

had to absorb some of the integrated functions that used to reside in Sage 300 Construction and Real Estate. Most of these functions will be familiar to you, although you could notice the following differences:

- The **Log On** window is simpler, and you cannot use this window to change your password.
- The **Select Company** window is also streamlined. It comprises one dropdown list from which to select a company, and does not include secondary windows where you can specify folders or remove companies from the Company list.
- When exporting to Job Cost:
  - The Job Cost Export Wizard includes a help button.
  - For the final step of the wizard, the button you click is called **Send to JC**, rather than Post to JC.
  - The **Invalid Cost Code** dialog box, displayed if the application encounters an invalid cost code, is simpler. However, there is no option to add the cost code during the export.
  - The **Export to Job Cost Summary** dialog box includes the job number.
- The **Export to Job Cost Validation Report** includes **Extra**, **Cost Code**, and **Category** information.

## Ability to import a Sage 300 Construction and Real Estate address book

If your contacts in Accounting are the same in Estimating—for example, an Estimating subcontractor might also be an AP vendor—you can save time by exporting an address book from Sage 300 Construction and Real Estate and importing it into Sage Estimating.

### To import an exported address book:

1. In the Estimating Management Console, click **[Address Book ]** on the ribbon.
2. In the **Companies/Contacts** pane, on the toolbar, click the **Import Address Book**  icon.
3. In the **Import Address Book** window that appears, in the text box, use the Browse button to select the exported address book (an XML file) that you want to import.
4. Click **[OK]**.

**Note:** When you re-import an updated address book into Estimating, only new contact information is updated.

# Fixes Since the Previous Version

Version 21.1 includes the following fixes:

- **Spreadsheet:**

- You can open an estimate that includes multiple addons that reference the same parent addon.
- You can duplicate estimates that have sorted columns.
- When you edit spreadsheet layouts that have a large number of locked columns, you no longer receive an error message saying there are too many locked columns.
- Your custom layouts are preserved when you upgrade to version 21.1.

- **Reports:**

- Item notes in plain text appear properly on custom reports.
- When you use a range to print an **Estimate report**, the **Estimate Partial Total** field shows the total for the items included in the range. The **Estimate Total** field always shows the grand total, regardless of the range you specify.
- When you print an **Estimate report** for an estimate that has allocated addons, the signature block shows the correct total, even if you do not print the Totals page.

- **Means Integrator:**

- City cost indexes are updated properly for the **Other** category.
- The city cost index now includes mappings for **Division 46**.

- **Miscellaneous:**

- Using the 64-bit Estimating, you can update prices for very large databases.
- You can renumber an assembly that is used in a model.
- When you edit a model, the changes you save to a dropdown list are available immediately.
- When you delete multiple contacts from the **Address Book**, they are removed properly from the tree in the catalog pane.
- In the **Database Editor** help, we've fixed the example regarding the price code formats to use for Excel.

# 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>  |

| Get help by:                                     | Recommendation*  | To access:   |
|--|--|--|
| Checking the latest product alerts               | Keep up with the latest product information in the Sage City <i>Announcements, News, and Alerts</i> forum. | Visit <a href="http://www.SageCity.com">www.SageCity.com</a>   |
| 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><br>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**.