The National Estimator

Quick Start

- Turn your estimate into a bid.
- Turn your bid into a contract.
- ConstructionContractWriter.com

Quarterly price updates on the Web are free and automatic all during the year of the product. You'll be prompted when it's time to collect the next update. A connection to the Web is required.

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Carlsbad, CA 92011
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The National Estimator

The *National Estimator* is a construction cost estimating program with an exceptionally large database – over 4,000 pages of labor, material and equipment costs. You can page through these costs one screen at a time or use the electronic index to search by keyword for exactly the information you need. When you find what you're looking for, split the screen in two so your estimate is on the bottom half of the screen and the database is on the top half. Then copy and paste into your estimate. Type the estimated quantity. The program extends prices and totals columns automatically. Add your overhead and profit as a percentage and then print the estimate.

Job Cost Wizard

Job Cost Wizard takes your estimates to the next level:

1. Turning estimates into invoices you can send out in a window envelope.
2. Exporting to *QuickBooks* where you can track actual costs against estimates.

Find instructions for using *Job Cost Wizard* toward the end of this document.

The installation program creates a Construction Estimating program group and puts icons in that group. Information on the next page explains how to use each of these icons. If you have trouble installing the program, call Craftsman tech support at 760-438-7828, Ext. 2.

Construction Estimating program group.

What is Installed

Here's a roadmap to what you'll find in *National Estimator.*

National Estimator is a neat little construction cost estimating program for Windows™. You can use *National Estimator* all by itself. But it's the perfect way to use the 11 construction cost estimating databases from Craftsman. When installation of any estimating package is complete, click on the *National Estimator* icon to begin running the program. Read on for instructions for using *National Estimator*.

Over 4,000 pages of labor and material costs from 11 costbooks can be downloaded from Craftsman's website to run in *National Estimator*. Once the program is running, access to all the cost estimates in the costbooks you purchased is just a few mouse clicks away. Click **File**, click **Open Costbook**, and a list of your costbooks will appear. Click on the one you want to use.

All the costbooks you purchased can be open at the same time – you can use the labor and material costs from all in any single estimate.

The costbooks available are:

Construction.cbk is the *National Construction Estimator*. This is the default costbook — it opens automatically when you begin the *National Estimator* program. Instructions for opening any of the other 10 costbooks, and for changing your default costbook are later in this *Quick Start*.

Concrete.cbk is the *National Concrete & Masonry Estimator*

Framing.cbk is the *National Framing & Finish Carpentry Estimator*

Improvement.cbk is the *National Home Improvement Estimator*

Repair.cbk is the *National Repair & Remodeling Estimator*

Electrical.cbk is the *National Electrical Estimator*

Plumbing.cbk is the *National Plumbing & HVAC Estimator*

Painting.cbk is the *National Painting Cost Estimator*

Insurance.cbk is the *National Renovation & Insurance Repair Estimator*

Earthwork.cbk is the *National Earthwork & Heavy Equipment Estimator*

Heavy.cbk is the *National Heavy Construction Estimator*

Job Cost Wizard turns *National Estimator* estimates into invoices you can mail to clients and exports invoices or estimates to *QuickBooks Pro* (version 5 and higher) and can send customer information and estimate total to Craftsman's *Construction Contract Writer*. To start *Job Cost Wizard*, click on the **Job Cost Wizard** icon in the Construction Estimating program group.

ShowMe is an interactive video guide to *National Estimator*. Sit back and relax and let the interactive video run, or jump from topic to topic. Exit any time you want. Then go back later to brush up on anything you missed. To watch ShowMe, go to http://www.craftsman-book.com/Support

Forty-four Estimating and Bidding Forms are included when you install *National Estimator*. If you have a printer, you'll be able to create top-quality customized forms in minutes. To use these forms, you'll need any of the popular word processing or spreadsheet programs. First, start your word processing or spreadsheet program. Then click on **File** and **Open**. Browse to the Documents folder, then look for the Construction Forms folder. You'll see the 44 forms created especially for each of the following programs:

- Microsoft Word (file name extension of DOC)
- Microsoft Excel (file name extension of XLS)
- Portable Document Format (file name extension of PDF)

- Rich Text Format (file name extension of RTF)
- WordPerfect (file name extension of WP)

To open any form, double-click on the form name. Make the changes you want. Then save the modified form to your hard drive (such as C:). For a description of all forms, open the file INDEX.TXT in the documents\Construction Forms directory.

By default, all of these forms are installed to the My Documents directory of your computer under Construction Forms.

National Estimator Help has everything you could ever want to know about *National Estimator*. These help files are available any time *National Estimator* is running (click on the question mark) or from the Construction Estimating program group (click on **National Estimator Help**). To print a selected topic, click **File** on the Menu Bar. Then click **Print** or click **Print** on the Tool Bar.

Job Cost Wizard Help explains how to use *Job Cost Wizard* to convert *National Estimator* estimates into invoices and then export the estimate or invoice to either *QuickBooks* or *QuickBooks Pro* (version 5 and higher). This Help file is available any time you're running *Job Cost Wizard*. Just click **Help** on the menu bar. Then click on **Contents** and the topic of your choice. From Help Contents you can print an 18-page guide to *Job Cost Wizard*: Click on **Print All Topics**. Then click on **File, Print Topic** and **OK**.

System Requirements

- *Windows XP or higher*.
- PC with 1 gigahertz (GHz) or higher processor.
- Requires up to 160 megabytes (MB) of hard disk space.
- 512 MB system memory.
- 1024 x 768 or higher video resolution.
- To listen to video tutorial - Sound card and speakers.
- Internet connection is required to receive quarterly updates.

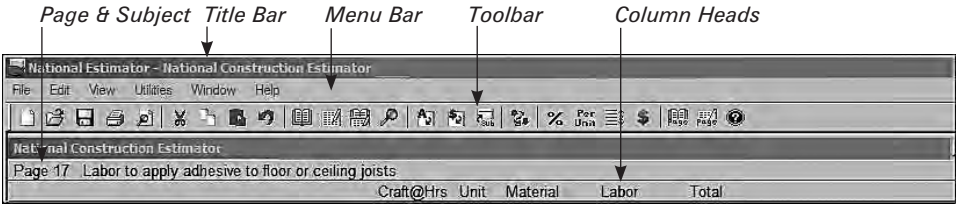
Estimating with National Estimator

National Estimator begins when you click on the *National Estimator* desktop icon or click on **Start, All Programs**, the **Construction Estimating** group and then **National Estimator**.

On the title bar at the top of the screen you see the program name, *National Estimator*, and then whichever default costbook you've chosen. In our example, it's the National Construction Estimator. Let's take a closer look at the other information at the top of your screen.

The Menu Bar

Below the title bar you see the menu bar. Every option in *National Estimator* is available on the menu bar. Click with your left mouse button on any item on the menu bar to open a list of available commands.



Buttons on the Toolbar

Below the menu bar you see 24 buttons that make up the toolbar. The options you use most in *National Estimator* are only a mouse click away on the toolbar.

Column Headings

Below the toolbar you'll see column headings for your costbook:

Craft@Hrs for craft (the crew doing the work) and man-hours (to complete the task)

Unit for unit of measure, such as per linear foot or per square foot

Material for material cost

Labor for labor cost

Total for the total of all cost columns

The Status Bar

The bottom line on your screen is the status bar. Here you'll find helpful information about the choices available. Notice "Page 17/644" near the center of the status line. That tells you that you're looking at page 17 of a 644-page book. When you see PICT at the right of the status bar, a picture is available in the costbook. Click on PICT to show the picture. Click on PICT again to hide the picture.

Check the status bar occasionally for helpful tips and explanations of what you see on screen.

The Costbooks

All 11 costbooks are available in the Costbook Window. *National Construction Estimator* is the default costbook and opens automatically. Notice also the words *Page 17 Adhesives* at the left side of the screen just below the toolbar. That tells you that the Adhesives section of page 17 is on the screen.

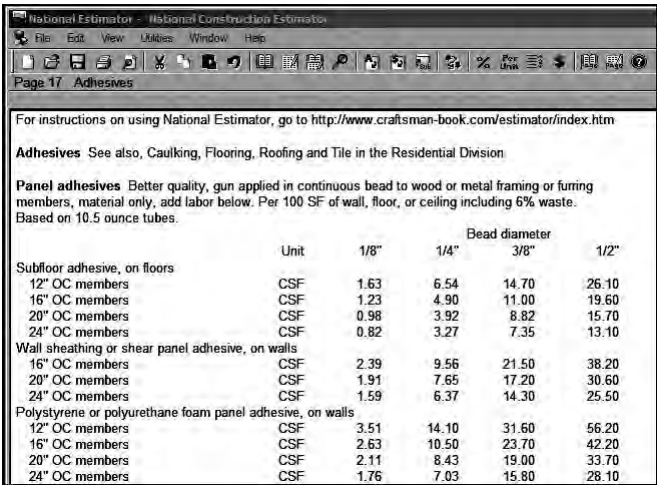
To turn to the next page either:

- Press PgDn (with Num Lock off), -or-
- Click on the lower half of the scroll bar at the right edge of the screen.

To move down one line at a time, either:

- Press the ↓ arrow key (with Num Lock off), -or-
- Click on the arrow on the down scroll bar at the lower right corner of the screen.

To make the costbook fill your screen, click the (Costbook Window) button.



For instructions on using National Estimator, go to http://www.craftsman-book.com/estimator/index.htm

Adhesives See also, Caulking, Flooring, Roofing and Tile in the Residential Division

Panel adhesives Better quality, gun applied in continuous bead to wood or metal framing or furring members, material only, add labor below. Per 100 SF of wall, floor, or ceiling including 6% waste. Based on 10.5 ounce tubes.

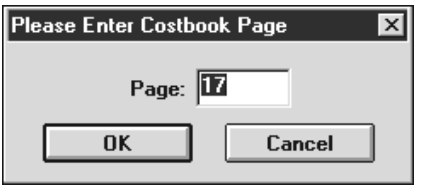
		Bead diameter			
	Unit	1/8"	1/4"	3/8"	1/2"
Subfloor adhesive, on floors					
12" OC members	CSF	1.63	6.54	14.70	26.10
16" OC members	CSF	1.23	4.90	11.00	19.60
20" OC members	CSF	0.98	3.92	8.82	15.70
24" OC members	CSF	0.82	3.27	7.35	13.10
Wall sheathing or shear panel adhesive, on walls					
16" OC members	CSF	2.39	9.56	21.50	38.20
20" OC members	CSF	1.91	7.65	17.20	30.60
24" OC members	CSF	1.59	6.37	14.30	25.50
Polystyrene or polyurethane foam panel adhesive, on walls					
12" OC members	CSF	3.51	14.10	31.60	56.20
16" OC members	CSF	2.63	10.50	23.70	42.20
20" OC members	CSF	2.11	8.43	19.00	33.70
24" OC members	CSF	1.76	7.03	15.80	28.10

The costbook window has all the cost estimates in the 11 costbooks.

To turn quickly to any page either:

- Click on the (Turn to Costbook Page) button near the right end of the toolbar, -or-
- Click on **View** on the menu bar. Then click on **Turn to Costbook Page**.

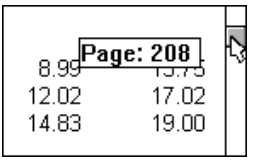
Type the number of the page you want to see and press Enter. *National Estimator* will turn to the top of the page you requested.



Type the page number you want to see.

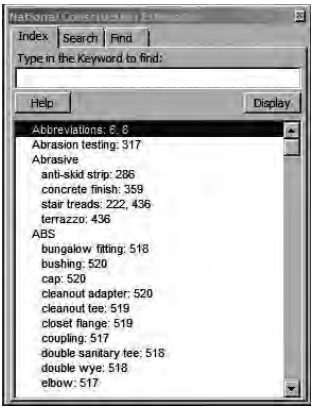
An Even Better Way

Find the small square in the slide bar at the right side of the Costbook Window. Click and hold on that square while rolling the mouse up or down. Keep dragging the square until you see the page you want in the Page: box. Release the mouse button to turn to the top of that page.



Drag the square to see any page.

A Still Better Way: Keyword Search



Use the electronic index to find cost estimates for any item.

To find any cost estimate in seconds, search by keyword in the index. To go to the index, either:

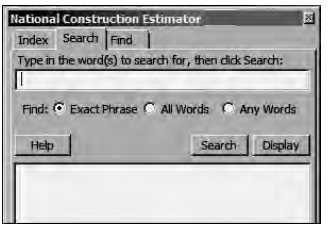
- Click on the (Index) button near the center of the toolbar, -or-
- Click on **View** on the menu bar. Then click **Index Window**.

Notice that the cursor is blinking in the Type in the Keyword to Find box at the left of the screen. Obviously, the index is ready to begin a search.

If you prefer a Web-like search, all Craftsman cost-books include a search tab. Click the **Search** tab. Type the words you're looking for. Click either:

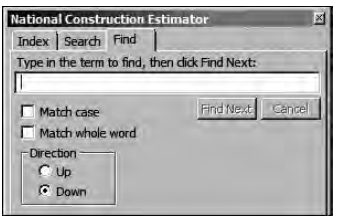
- Exact Phrase, or
- All Words, or
- Any Words.

Then click **Search**.



Or click the Search tab in the Index window for a Web-like search by keyword.

If you prefer to find every occurrence of a word, click the **Find** tab. Type the word and click **Find Next**.

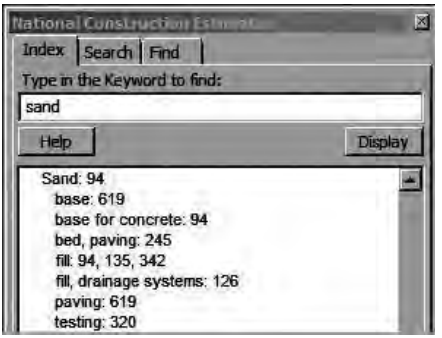


Find every occurrence of a word.

Your First Estimate

Suppose we're estimating the cost of 4'' sand fill under a 10' x 10' (100 square foot) concrete slab. Let's put the index to work looking for sand fill base.

- Click the **Index** tab near the top of the Index window.
- Type *sand* as illustrated.

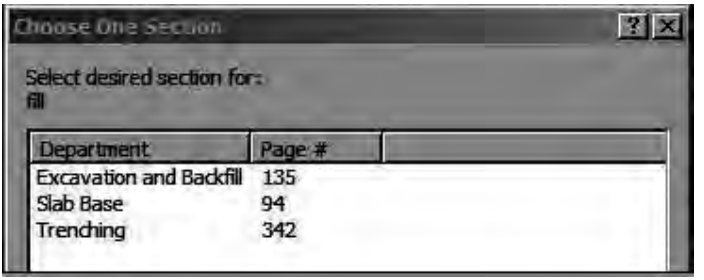


The index jumps to Sand.

The fourth item under sand is *fill*: 94, 135, 342. Either:

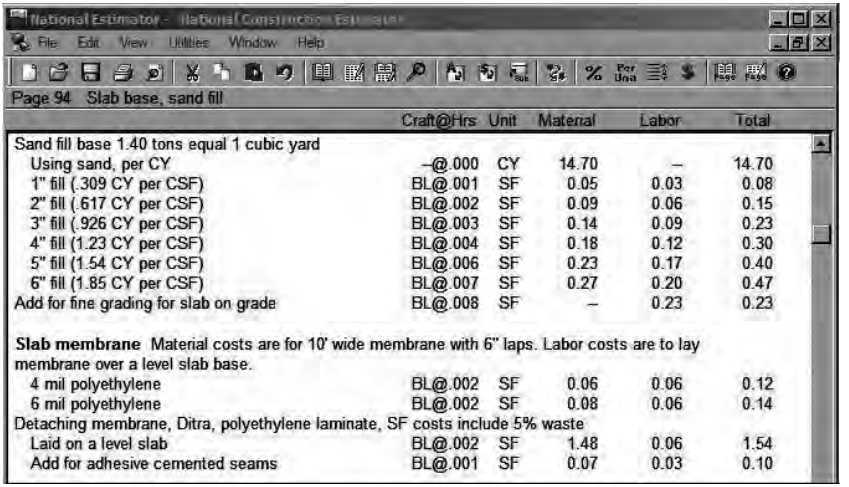
- Click once on that line and Press [Display]
  -or-
- Double-click on that line.

Double-click on the page you want to see (page 94 in this case).



If costs appear on several pages, click on the page you prefer.

- You'll see Sand fill base on page 94, as in the illustration below. Note that costs in the Costbook window may be different from what you see in this Quick Start if you've opted for local price adjustments (Area Modification Factors) by entering a zip code for the project. See more on Area Modification Factors later in this *Quick Start.*



Page 94 Slab base, sand fill

	Craft@Hrs	Unit	Material	Labor	Total
Sand fill base 1.40 tons equal 1 cubic yard					
Using sand, per CY	–@.000	CY	14.70	–	14.70
1" fill (.309 CY per CSF)	BL@.001	SF	0.05	0.03	0.08
2" fill (.617 CY per CSF)	BL@.002	SF	0.09	0.06	0.15
3" fill (.926 CY per CSF)	BL@.003	SF	0.14	0.09	0.23
4" fill (1.23 CY per CSF)	BL@.004	SF	0.18	0.12	0.30
5" fill (1.54 CY per CSF)	BL@.006	SF	0.23	0.17	0.40
6" fill (1.85 CY per CSF)	BL@.007	SF	0.27	0.20	0.47
Add for fine grading for slab on grade	BL@.008	SF	–	0.23	0.23
Slab membrane Material costs are for 10' wide membrane with 6" laps. Labor costs are to lay membrane over a level slab base.					
4 mil polyethylene	BL@.002	SF	0.06	0.06	0.12
6 mil polyethylene	BL@.002	SF	0.08	0.06	0.14
Detaching membrane, Ditra, polyethylene laminate, SF costs include 5% waste					
Laid on a level slab	BL@.002	SF	1.48	0.06	1.54
Add for adhesive cemented seams	BL@.001	SF	0.07	0.03	0.10

Costs for sand fill base on page 94.

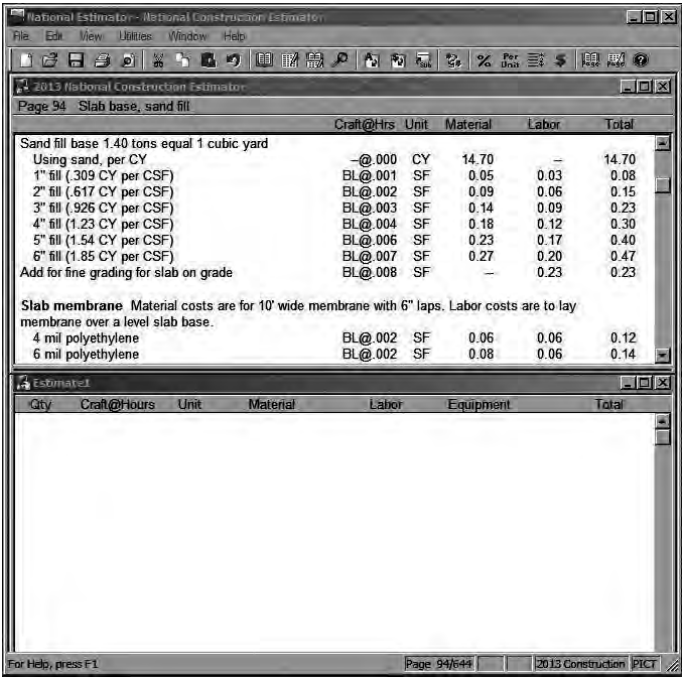
You're finished with the index for now. If you want to close the index, click the X in the upper right corner of the Index window.

Splitting the Screen

Most of the time you'll want to see what's in both the costbook and your estimate. To split the screen into two halves, either:

- Click on the (Split Window) button near the center of the toolbar, -or-
- Click on **View** on the menu bar. Then click on **Split Window** and your screen should look like the example below.

Notice that the costbook is at the top of the screen and your estimate is at the bottom. Column headings are at the top of the costbook and across the middle of the screen (for your estimate).



The Split Window: Costbook above and estimate below.

To Switch from Window to Window

- Click in the window of your choice, -or-
- Hold the Ctrl key down and press Tab.

Notice that a window title bar turns dark when that window is selected. The selected window is where keystrokes appear as you type. Click in the bottom half of the screen so your estimate is selected.

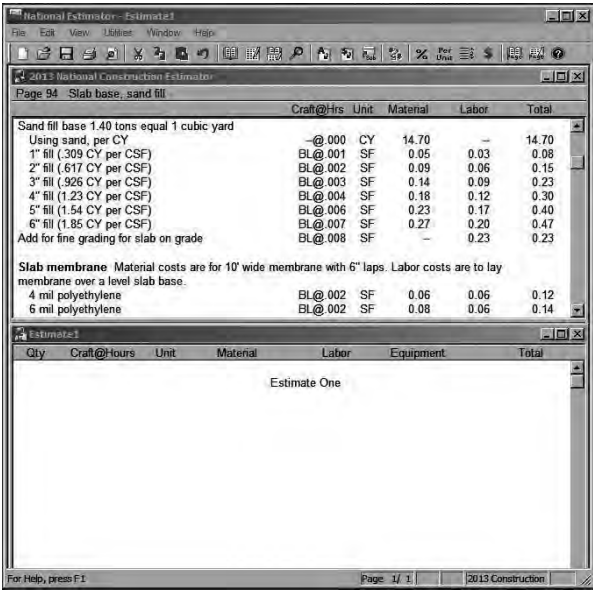
Beginning an Estimate

You can type anything in the Estimate Window. Let's start by putting a heading on this estimate:

1. Press Enter once to space down one line.
2. Press Tab four times (or hold the space bar down) to move the blinking cursor (the insert point) near the middle of the line.

3. Type “Estimate One” and press Enter↵. That’s the title of this estimate, “Estimate One.”

4. Press Enter↵ again to move the cursor down a line. That opens up a little space below the title.



Begin by putting a title on your estimate, such as “Estimate One.”

Copying Costs to Your Estimate

Next, we’ll estimate the cost of 100 square feet of sand fill base. Click the (Split Window) button on the toolbar to be sure you’re in the split window. Then find the line that shows costs for 4’’ sand fill base:

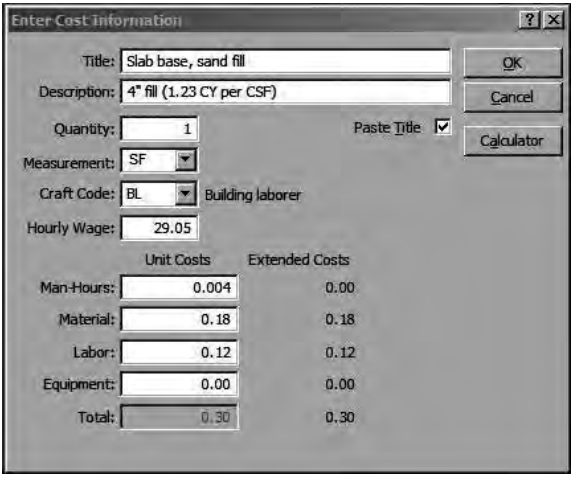
4" fill (1.23 CY per CSF)	BL@.004	SF	0.18	0.12	0.30

To copy this line to your estimate:

1. Click on the line.
2. Click the (Copy) button.
3. Click on the (Paste) button to open the Enter Cost Information dialog box.

Hint: Instead of clicking on the (Copy) and (Paste) buttons, you can both copy and paste by pressing the F8 key.

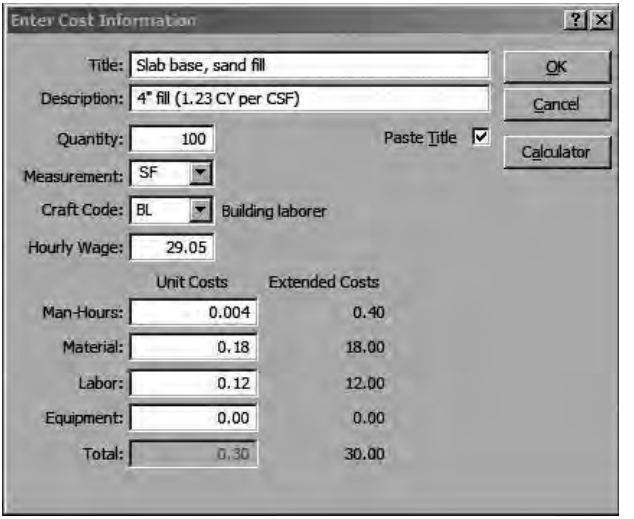
Notice that the blinking cursor is in the Quantity box:



Use the Enter Cost Information dialog box to enter quantities and change costs.

1. Type a quantity of 100 because the slab base is 100 square feet (10′ x 10′).
2. Press Tab and check the estimate for accuracy. See the illustration below.
3. Notice that the column headed Unit Costs shows costs per unit, per SF (square foot) in this case.
4. The column headed Extended Costs shows costs for the entire slab base (100 square feet).
5. The lines opposite Title and Description show what's getting installed. You can change the words in either of these boxes. Just click on what you want to change and start typing or deleting.
6. You can also change any numbers in the Unit Cost column. Just click and start typing.

7. When the words and costs are exactly right, press Enter↵ or click on OK to copy these figures to the end of your estimate.



Costs for 100 SF job (extended costs) are on the right.

The new lines at the **bottom** of your estimate show:

Slab base, sand fill						
4" fill (1.23 CY per CSF)						
100.00	BL@.4000	SF	18.00	12.00	0.00	30.00

Extended costs for sand fill base as they appear on your estimate form.

100.00 is the quantity of sand in square feet

BL is the recommended crew, a building laborer

@**.4000** shows the manhours required for the work

SF is the unit of measure, square feet in this case

18.00 is the material cost (the sand fill)

12.00 is labor cost for the job

0.00 shows there is no equipment cost

30.00 is the total of material, labor and equipment columns

Copy Anything to Anywhere in Your Estimate

Anything in the costbook can be copied to your estimate. Just click on the line (or select the words) you want to copy and press the F8 key. It's copied to the last line of your estimating form. If your selection includes costs, you'll have a chance to enter the quantity. To copy to the *middle* of your estimate:

1. Select what you want to copy.
2. Click on the (Copy) button.
3. Click in the estimate where you want to paste.
4. Click on the (Paste) button.

Drag and Drop Estimating

You can also drag lines or words out of the costbook and drop them in your estimate:

1. Click on the line to copy and move your mouse slightly so the line is selected (turns black).
2. Release the mouse button. The line remains selected.
3. Click again on the selected line. This time hold your mouse button down.

Circle with a bar

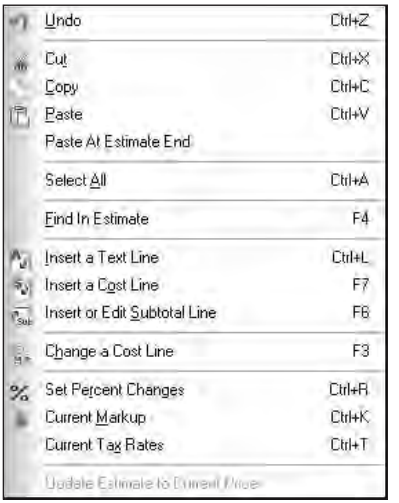
Vertical bar with mouse cursor

4. Your mouse cursor turns into a circle with a diagonal bar.
5. Holding the mouse button down, move the circle with a bar into the Estimate Window.
6. Once in the Estimate Window, you'll see a vertical bar to the left of your mouse cursor.
7. Move this vertical bar to where the copied line should be pasted.
8. Then release the mouse button. The line is pasted in that position.

9. If the line pasted includes costs, you'll have a chance to enter a quantity.

Right-Click Editing

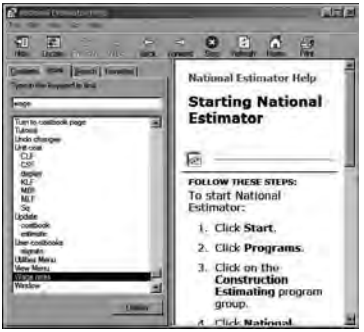
Most of what you do in *National Estimator* is editing — such as Cut, Copy, Paste and Undo. Most editing features have their own button on the toolbar. Of course, all editing functions are available from the Edit selection on the menu bar. But you might find it easier and quicker to open the floating edit menu by right-clicking with your mouse. Press the right mouse button. All edit functions currently a valid choice will be available. Simply click on the selection you need.



Right-click editing menu.

Changing Wage Rates

The labor cost for sand fill is based on a building laborer working at a cost of $29.05 per hour. Suppose $29.05 per hour isn't right for your estimate. What then? No problem! It's easy to use your own wage rate for any crew or even make up your own crew codes. To get more information on setting wage rates, press F1. At *National Estimator* Help, click on the **Key** button. Type *wage* then



Search for information on setting wage rates.

click on **Wage Rates** and **Setting Hourly Wage Rates**. To return to your estimate, click on **File** on the *National Estimator* Help menu bar. Then click on **Exit**.

Changing Cost Estimates

With Num Lock off, use the [↑] or [↓] arrow key to move the cursor to the line you want to change (or click on that line). In this case, click anywhere on the line that begins with a quantity of 100. To open the Enter Cost Information Dialog box, either:

- Press [Enter↵], -or-
- Click on the [$] (Change Cost) button on the toolbar.

To make a change, either:

- Click on what you want to change, -or-
- Press [Tab⇥] until the cursor advances to what you want to change.

	Unit Costs	Extended Costs
Man-Hours:	0.004	0.40
Material:	0.18	18.00
Labor:	0.12	12.00
Equipment:	0.00	0.00
Total:	0.30	30.00

Change the material cost to .30.

Then type the correct figure. In this case, change the material cost to $.30.

Press Tab and check the Extended Costs column. If it looks OK, press Enter and the change is made on your estimating form.

Changing Text (Descriptions)

Click on the (Estimate Window) button on the toolbar to be sure you're in the estimate. With Num Lock off, use the ↑ or ↓ arrow key or click the mouse button to put the cursor where you want to make a change. In this case, we're going to make a change on the line that begins "Sand fill base."

To make a change, click where the change is needed. Then either:

- Press the X or B key to erase what needs deleting, -or-
- Select what needs deleting and click on the (Cut) button on the toolbar.
- Type what needs to be added.

To select, click and hold the mouse button while dragging the mouse.

In this case, click just before "Slab base." Then hold the left mouse button down and drag the mouse to the right until you?ve put a dark background behind "slab base." The dark background shows that this word is selected and ready for editing.

Press the Del key, or click on the (Cut) button on the toolbar, and the selection is cut from the estimate. If that's not what you wanted, click on the (Undo) button and "Slab base" is back again.

Adding Text (Descriptions)

Some of your estimates will require descriptions (text) and costs that can't be found in any of the 11 cost-books in *National Estimator*. What then? With *National Estimator* it's easy to add descriptions and costs of your choice anywhere in the estimate. For practice, let's add an estimate for four reinforced corners to Estimate One.

Click on the (Estimate Window) button to be sure the estimate window is maximized. We can add lines anywhere on the estimate. But in this case, let's make the addition at the end. Press the ↓ arrow key to move the cursor down until it's just above the horizontal line that separates estimate detail lines from estimate totals. To open a blank line, either:

```
sand fill
4" fill (1.23 CY per CSF)
100.00        BL@.4000
Reinforced Corners
```

Adding "Reinforced corners."

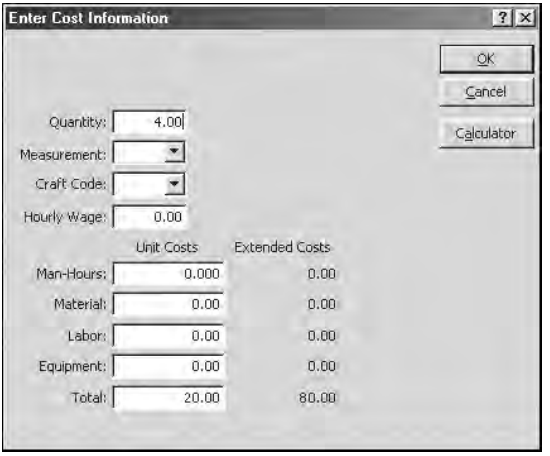
- Press Enter↵, -or-
- Click on the (Insert Text) button on the toolbar, -or-
- Click on **Edit** on the menu bar. Then click on **Insert a Text Line**.

Type "Reinforced Corners" and press Enter↵.

Adding a Cost Estimate Line

Now let's add a cost for "Reinforced Corners" to your estimate. Begin by opening the Enter Cost Information dialog box. Either:

- Click on the (Insert Cost) button on the toolbar, -or-
- Click on **Edit** on the menu bar. Then click on **Insert a Cost Line**.



Unit and extended costs for four reinforced corners.

1. The cursor is in the Quantity box. Type the number of units (4 in this case) and press Tab.
2. The cursor moves to the next box, Measurement.
3. In the Measurement box, type *Each* and press Tab.
4. Press Tab twice to leave the Craft Code blank and Hourly Wage at zero.
5. Since these corners will be installed by a subcontractor, there's no material, labor or equipment cost. So press Tab four times to skip over the Man-Hours, Material, Labor and Equipment boxes.
6. In the Total box, type 20.00. That's the cost per corner quoted by your supplier.
7. Press Tab once more to advance to OK.
8. Press Enter and the cost of four reinforced corners is written to your estimate.

   Note: The sum of material, labor and equipment costs appears automatically in the Total box. If there's no cost entered in the Material, Labor or Equipment boxes (such as for a subcontracted item), you can enter any figure in the Total box.

Adding Lines to the Costbook

Add lines or make changes in the costbook the same way you add lines or make changes in an estimate. The additions and changes you make become part of the user costbook. For more information on user costbooks, press F1. Click on the key icon (Index). Type "user" and press Enter.

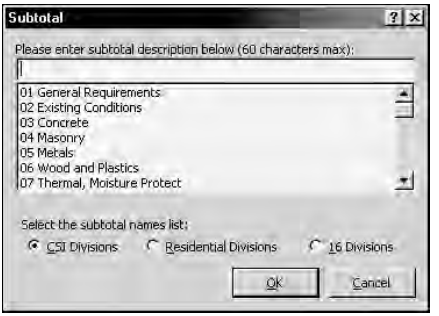
Subtotals Become *QuickBooks* Cost Categories

It's considered good estimating practice to insert a subtotal at the end of each section in your estimate. For a general contractor, estimate sections might be Demolition, Excavation, Foundation, Framing, etc. Estimate sections for an insurance repair contractor

might include Kitchen, Bathroom or Living Room. Section subtotals help organize your estimates and make them easier to read and understand. Insert section subtotals wherever they make the most sense to you. These subtotals become cost categories when printing bids and invoices. They also become cost category names when exporting to *QuickBooks*.

To insert a subtotal:

1. Click on the last cost line of the section (or on any blank line below the section).
2. Click on the (Subtotal) button on the toolbar (or click on Edit and Insert or Edit Subtotal Line).
3. Type a name or description for the section (such as "Slab").
4. Press Enter↵.



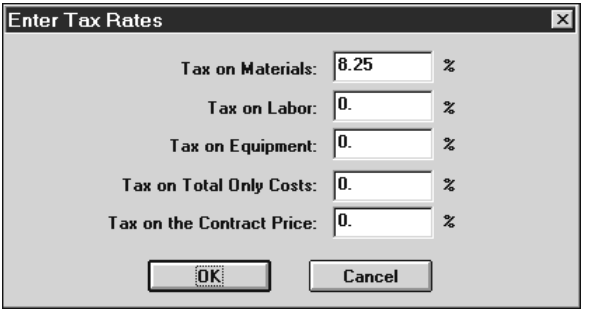
Insert a subtotal.

Adding Tax

To include sales tax in your estimate:

1. Click on **Edit**.
2. Click on **Current Tax Rates**.
3. Type the tax rate in the appropriate box.
4. Press Tab⇥ to advance to the next box.
5. Press Enter↵ or click on **OK** when done.

In this case, the tax rate is 8.25% on materials only. Tax will appear at the end of the estimate.



Type the tax rate that applies.

Adding Overhead and Profit

Set markup percentages in the Add for Overhead & Profit dialog box. To open the box, either:

- Click on the (Markup) button on the toolbar, -or-
- Click on **Edit** on the menu bar. Then click on **Current Markup**.

Adding overhead & profit.

Type the percentages you want to add for overhead. For this estimate:

1. Type 15 on the Overhead line.
2. Press Tab twice to advance to Contingency.
3. Type 5 on the Contingency line.

4. Press Tab twice to advance to Profit.
5. Type 10% on the Profit line.
6. Press Enter.

Markup percentages can be changed at any time. Just reopen the Set Markup Amounts dialog box and type the correct figure.

Preview Your Estimate

You can display an estimate on screen just the way it will look when printed on paper. To preview your estimate, either:

- Click on the (Print Preview) button on the toolbar,
  -or-
- Click on **File** on the menu bar. Then click on **Print Preview**.

Construction Estimate
File Name: Estimate1
Page 1

Qty	Craft@Hours	Unit	Material	Labor	Equipment	Total
				Estimate One		
Slab base, sand fill						
4" fill (1.23 CY per CSF)						
100.00	BL@.4000	SF	18.00	12.00	0.00	30.00
Reinforced corners						
4.00	--@.0000	--	0.00	0.00	0.00	80.00
Total Manhours, Material, Labor, and Equipment:						
	0.4		18.00	12.00	0.00	30.00
Total Only (Subcontract) Costs:						80.00
				Subtotal:		110.00
				15.00% Overhead:		16.50
				5.00% Contingency:		6.33
				10.00% Profit:		13.28
				Estimate Total:		146.11
				8.25% Tax on Materials:		1.49
				Grand Total:		147.60

A preview of Estimate One.

In print preview:

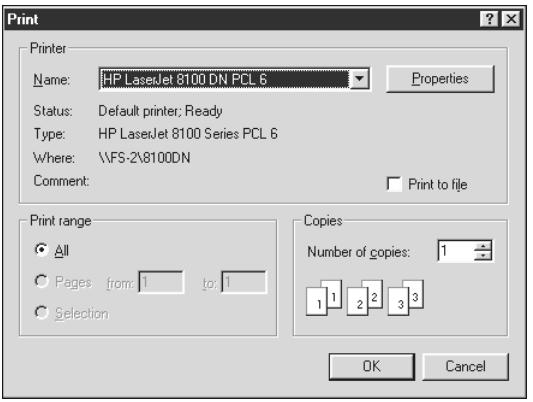
- Click on **Next Page** or **Prev Page** to turn pages.
- Click on **Two Page** to see two estimate pages side by side.
- Click on **Zoom In** to get a closer look.
- Click on **Close** when you've seen enough.

Use buttons in Print Preview to see your estimate as it will look when printed.

Printing Your Estimate

When you're ready to print the estimate, either:

- Click on the (Print) button on the toolbar, -or-
- Click on **File** on the menu bar. Then click on **Print**, -or-
- Hold the Ctrl key down and type the letter P.

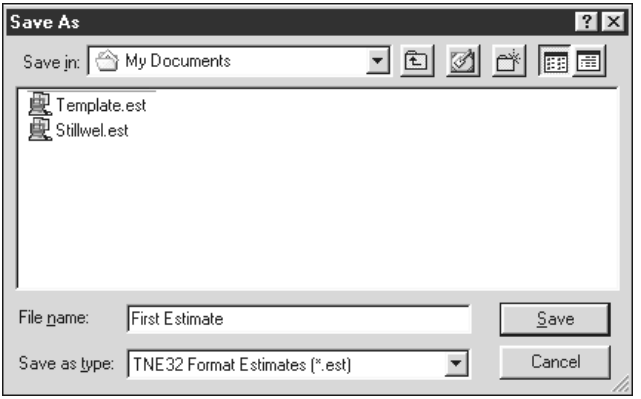


Options available depend on the printer you're using.

- Press Enter↵ or click on OK to begin printing.

Save Your Estimate to Disk

To store your estimate on the hard disk where it can be reopened and changed at any time, either:



Type the estimate name in the File Name box to assign a file name.

- Click on the (Save) button on the toolbar, -or-
- Click on **File** on the menu bar. Then click on **Save**, -or-
- Hold the Ctrl key down and type the letter S.

The cursor is in the File Name box. Type the name you want to give this estimate, such as *First Estimate*. Press Enter or click on **OK** and the estimate is written to disk. Note that the default location for estimates is the *My Documents* folder.

Opening Other Costbooks

National Estimator comes with 11 construction cost estimating databases — over 4,000 pages of labor and material costs published in 11 estimating references.

National Concrete & Masonry Estimator

National Construction Estimator

National Earthwork & Heavy Equipment Estimator

National Electrical Estimator

National Framing & Finish Carpentry Estimator

National Home Improvement Estimator

National Renovation & Insurance Repair Estimator

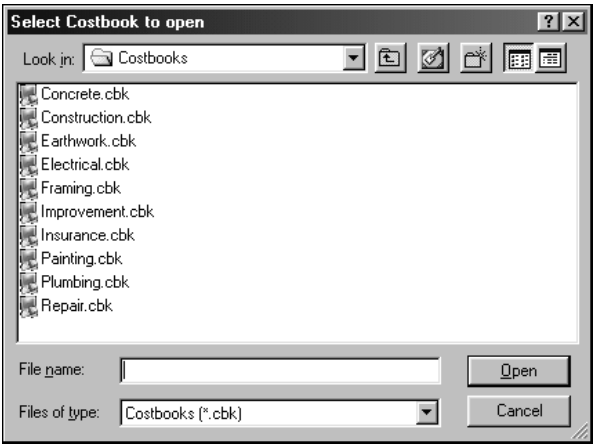
National Painting Cost Estimator

National Plumbing & HVAC Estimator

National Repair & Remodeling Estimator

National Repair & Remodeling Estimator

National Heavy Construction Estimator



Open the costbook of your choice.

To open any of the 11 costbooks, click **File** on the menu bar. Click **Open Costbook**. Then double-click on the costbook of your choice. To see a list of the costbooks open, click **Window** on the menu bar.

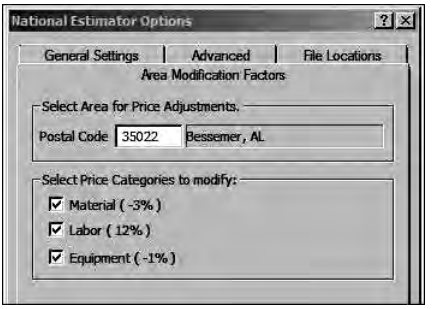
Select Your Default Costbook

Your default costbook is the last costbook installed. It opens automatically every time you begin using *National Estimator*. To change your default costbook, click **Utilities** on the menu bar. Then click **Options**. Click the **General Settings** tab. Next, click **Select**. Click the costbook of your choice. Click **Open**. Then click **OK**.

Selecting the default costbook.

Select Area Modification Factors

Click **Utilities** on the menu bar. Click **Options**. Then click the Area Modification Factors tab. Type the US Zip Code or Canadian Postal Code of your job. Press the Tab key. Then click in the box beside the category you want to modify. Click **OK** and the costbook will be adjusted accordingly. Area modification factors change from time to time and will be installed automatically when you request a price update on the Web. Note that not all Craftsman costbooks include area modification factors.



Selecting Area Modification Factors for Bessemer, AL.

The Next Steps

That completes the basics. You've learned enough to complete most estimates. But an estimate is just the starting point for most jobs. The next step is to turn the estimate into a bid.

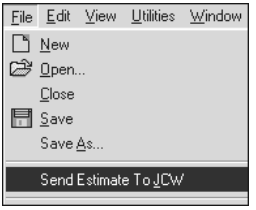
The remainder of Quick Start covers turning an estimate into a bid (*Job Cost Wizard*) and loading that bid into *QuickBooks*. *Job Cost Wizard* was installed on your computer when you installed *National Estimator*. *QuickBooks* is available at extra charge from http://QuickBooks.com. *Construction Contract Writer* is available at extra charge from http://Craftsman-Book.com.

Once installed on your computer, *Construction Contract Writer* opens when you press **Ctrl-K** in *Job Cost Wizard*. Your company name and address, your client's name and address, and the contract price transfer automatically to the contract. Protect yourself. Make it easy for your customer to say "Yes." Deliver a letter-perfect contract, legal in your state, when you deliver each bid.

Converting Estimates with *Job Cost Wizard*

Use *Job Cost Wizard* to:

- Convert estimates into bids and invoices you can send to a client, and,
- Export to *QuickBooks* where you can track job costs, receivables, payables, create payrolls and print financial reports.



Send the estimate to Job Cost Wizard.

To view your completed estimate in *Job Cost Wizard*, either:

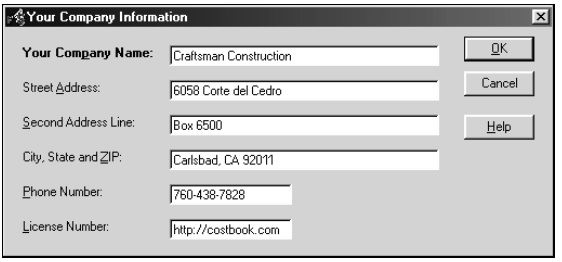
- Click on **File**, Click on **Send Estimate to JCW**, or
- Hold the Ctrl key down and tap J

You can also start *Job Cost Wizard* by clicking on the *Job Cost Wizard* icon in the Construction Estimating program group. Then click on the name of the estimate you want to open.

The Company Information dialog box will open the first time you use *Job Cost Wizard*. Type your company name and address. This will appear at the top of every estimate and invoice. When you've filled in information about your company, click on **OK** and your estimate will open in *Job Cost Wizard*.

To change any of the information about your company:

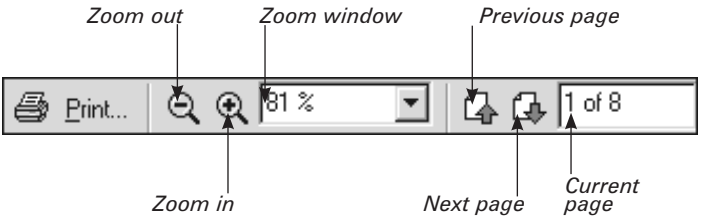
- Click on **Options**
- Click on **Your Company Info**
- Type the changes needed and click **OK**



Fill in information about your company.

Zoom, Scroll and Turn Pages

If the estimate doesn't fit your screen, set the percentage of zoom. For 640x480 resolution, type 81% in the zoom window and press Enter↵.

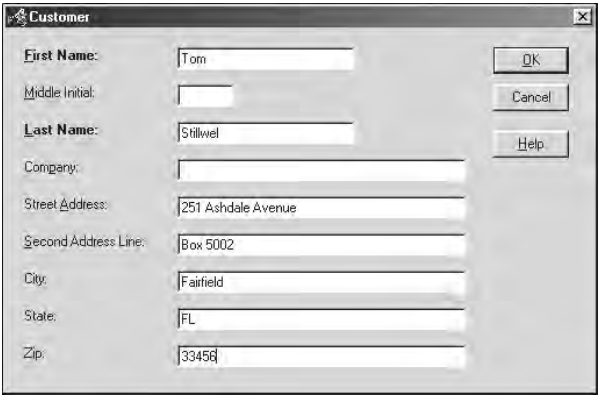


Click and drag the vertical slide bar at the right of your screen to scroll down the page. Turn pages by clicking on the Previous Page or Next Page buttons.

Enter Job Information

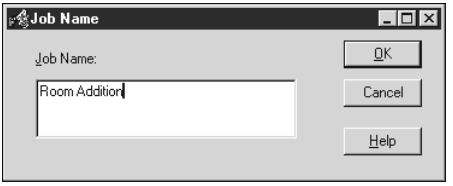
Job Cost Wizard needs some information about the job to create a nice-looking bid or invoice. For practice, enter job information for the Stillwel estimate:

1. **Customer name and address**. Click on the (Customer Info) button on the toolbar to enter information about the customer. Only the customer's first name and last name are required. All other information is optional. When done, click on **OK**.



Fill in Customer Information.

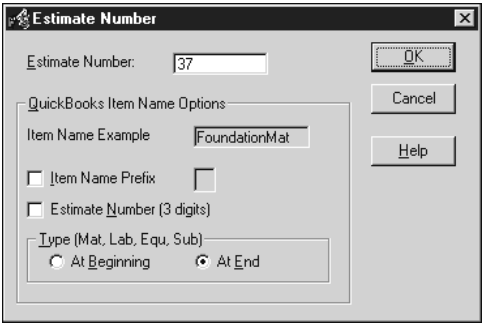
2. **Job Name**. Click on the (Job Name) button on the toolbar. Then type the name of the job, such as "Room Addition." When done, click on **OK**.



Enter a Job Name.

For transfers to QuickBooks You can change the customer or job name after the file has been imported into *QuickBooks*. In *QuickBooks*, click on **Lists**. Click on **Customers:Job List**. Right-click on customer name or job name. Click on **Edit**. Then click on the tab of your choice.

3. **Estimate Number**. Click on the (Estimate Number) button on the toolbar. *Job Cost Wizard* keeps track of the last number used and recommends using the next number in sequence. Click on **OK** when done.



Check the Estimate Number.

For transfers to QuickBooks When *QuickBooks* imports an estimate or invoice, subtotals in your estimate become cost categories ("items") in *QuickBooks*. By default, cost category names in *QuickBooks* are the first 28 characters of estimate subtotal names plus the work type, either *Mat, Lab, Equ,* or *Sub*. You can change this default in the Estimate Number dialog box.

Job Cost Wizard Prints Invoices Your Way

Your estimates should cover every cost in a job. But your bids and invoices don't have to show all the details and reveal your markup. So *Job Cost Wizard* gives you choices about showing or hiding the details and markup.

Amount of Detail

To set the amount of detail, click on the (Details) button.

If *Show All* is selected, every item in your bid or invoice will show a cost and each will become a cost category on the *QuickBooks* Item List. *Subtotals Only* is the default and will usually be a better choice.

If *Subtotals Only* is selected, subtotals will be the only costs in your bid or invoice. Each subtotal in your estimate becomes a cost category on the *QuickBooks* Items list. That's usually the best choice. If *Subtotals Only* is selected for all four cost categories, click on **Omit Work Descriptions** to show subtotal categories but hide all work descriptions.

The names you give to subtotals in *National Estimator* become cost category names in *QuickBooks*. Cost lines in *National Estimator* not followed by a subtotal become the "Project" subtotal.

How much detail do you want to show?

If *Omit Entirely* is selected, neither costs nor descriptions will appear for that type of cost — either material, labor, equipment or total only (subcontract). Use Omit Entirely for materials, for example, when materials are being furnished by the owner.

"Total only" costs are assumed to be subcontract items. Subcontract items have a cost in the total column but no cost for material, labor, or equipment.

Markup and Tax

Use the three buttons at the bottom of the Amount of Detail dialog box to show or hide markup (overhead, contingency and profit) and tax.

In Every Cost Item distributes markup and tax proportionately throughout the estimate. There's no mention of overhead, profit or markup anywhere in the estimate or invoice.

At End of Estimate puts markup and tax at the end of the estimate, as in *National Estimator*.

Omit Entirely omits markup and tax from the estimate or invoice. Use this option if you prefer to add markup and tax in *QuickBooks*.

Click **Show Only Item Totals** if you don't want the invoice or estimate to show any breakdown of material, labor or equipment costs.

Click on **OK** when done with the Amount of Detail dialog box.

QuickBooks Account Names

Estimates and invoices imported into *QuickBooks* include expense and income account names. If the imported accounts do not exist already in your *QuickBooks* company, *QuickBooks* will create new accounts. You can control the names of these accounts by making changes in the *QuickBooks* Options dialog box.

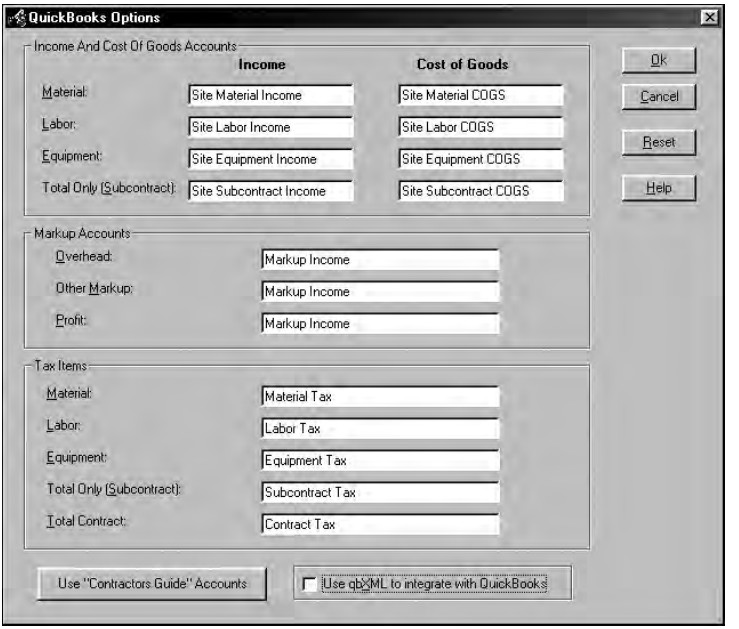
- Click on the (*QuickBooks* Options) button on the toolbar, -or-
- Click on **Options** on the menu bar. Then click on ***QuickBooks* Options**.

Enter the names you prefer for income, cost of goods, markup and tax accounts. Change "Material Tax" to "FL Sales Tax," for example, if the job is taxable under Florida law. *QuickBooks* will keep track of tax due in each state where you do business.

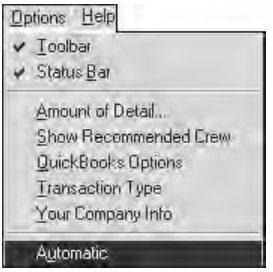
Click **Use "Contractors Guide" Accounts** if you prefer the account names recommended in *Contractor's Guide to QuickBooks*. An order form for this title is at http://costbook.com. To restore the default account names, click **Reset**.

If *QuickBooks Pro* version 2002 or later is installed on the computer, you should see a check mark beside *Use qbXML to integrate with QuickBooks*. XML exports to *QuickBooks*,

as will be explained below. If *QuickBooks Pro* is installed but there is no check mark, click on **Use qbXML to integrate with QuickBooks**. You'll be asked to identify the *QuickBooks* Company to receive imports from *Job Cost Wizard*. Select the company file you prefer and click **Open**. See *Exporting an Estimate to QuickBooks* for more on opening the XML link to *QuickBooks*.



Click on OK when done with QuickBooks Options.



Set up for automatic operation.

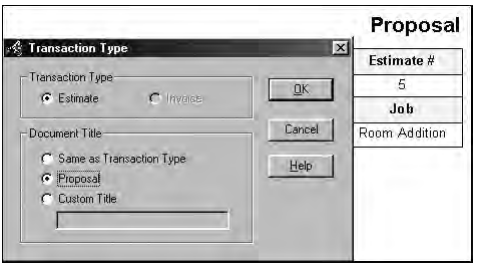
Automatic

Job Cost Wizard always requires customer information, a job name and a job number before exporting an estimate. In automatic mode, *Job Cost Wizard* opens the Customer Info, Job Name and Estimate Number dialog boxes automatically after opening any estimate.

Job Cost Wizard runs in automatic mode when there is

a check mark beside Automatic on the Options menu. To change to automatic mode, click on **Options** on the menu bar. Then click on **Automatic**.

Transaction Type and Your Company Info



Changing the form title to "Proposal."

On the Options menu, click **Transaction Type** to change the form title from Estimate to Invoice to Proposal or anything you want (Custom). For *QuickBooks* exports, the transaction type has to be either estimate or invoice.

On the Options menu, click **Your Company Info** to change the company name or address.

Click on the **Print** icon or **File** and **Print**. Then click **OK** to print the document.

Enter your company name.

Exporting an Estimate to *QuickBooks*

If you have *QuickBooks* 2002 or later, *Job Cost Wizard* will select XML export by default. If you have an earlier version of *QuickBooks*, exports will create an Intuit Interface File (IIF). XML exports happen over a direct link between the two programs. For IIF exports, *Job Cost Wizard* writes a file in the *QuickBooks* folder.

If you have 2002 QuickBooks or later, *use the XML export:*

1. Begin by clicking the QB icon.
2. *Job Cost Wizard* will advise that *QuickBooks* is asking permission to access the Company file.

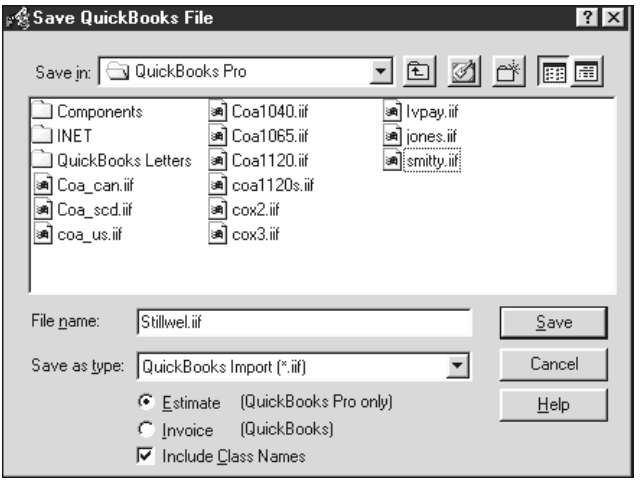
3. If you receive a warning about security level, follow instructions on the screen.
4. Click **Launch *QuickBooks*** and select the company file to receive the export.
5. *QuickBooks* will open.
6. Click **Yes, Always** to grant *Job Cost Wizard* access to the *QuickBooks* Company file.
7. A bar will report that the transfer is in progress. Click **OK** when the export is successful.
8. In *QuickBooks*, click **Customers**. Click **Create Estimates**. Then click **Previous** to see the imported estimate. You can skip information on IIF exports and go right to *Turn an Estimate Into an Invoice in QuickBooks* further down.

If you have an older version of QuickBooks, *use the IIF export:*

QB icon

1. Begin by clicking the QB icon.
2. Change the drive or the folder if the *QuickBooks* folder is not listed at the right of *Save in*.
3. Check the file name to be sure it is what you want.
4. If you use *QuickBooks Pro*, click on **Estimate**.
5. If you use regular *QuickBooks*, click on **Invoice**.
6. When complete, click on **Save**.

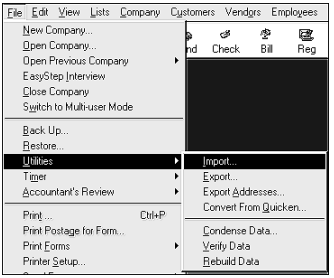
Exporting an estimate to *QuickBooks Pro* does not affect the original estimate in any way. *Job Cost Wizard* can open and export an estimate as many times as you want. To create a second copy of the same estimate with different *Job Cost Wizard* options, save with a slightly different file name. But note that *QuickBooks Pro* can import an estimate for any customer and job only once. See *Important Note* below.



Exporting as an estimate to QuickBooks Pro.

Opening IIF Import Files in *QuickBooks*

Once an estimate or invoice has been written to file with *Job Cost Wizard*, start *QuickBooks*:



Importing into QuickBooks.

1. Click on **File**.
2. Click on **Utilities**.
3. Click on **Import**.
4. Click on **IIF**.
5. Double-click on the name of the estimate or invoice you want.
6. Click on **OK** when the import is complete.
7. Click on **Customers**.
8. Click on **Create Estimates** if you saved the file as an estimate.
9. Click on **Create Invoices** if you saved the file as an invoice.
10. Click on **Previous** to see the file just imported.

Important Note: With *QuickBooks Pro* 2002 and higher, you can import an estimate only once from an IIF. On second import of the same estimate, you'll see an error message, "Can't record invalid transaction." If you make a mistake and want to import an estimate again, delete the previous imported estimate before importing again. Instructions for deleting an estimate follow, under *Don't Worry About Making a Mistake.* If you want two versions of any one estimate in *QuickBooks Pro*, save the alternate estimate with a slightly different job name or customer name. That makes the estimate different enough so it will import perfectly into *QuickBooks*.

Filling in The "Amount" Column (IIF only)

An imported estimate is not complete until some figure appears in the Amount column of each cost line. So long as the Amount column is blank, *QuickBooks* will consider the estimated cost for that line to be zero (even when numbers appear in the Total column). If the Amount column for an entire estimate is left blank, *QuickBooks* reports will show the estimated cost for that job to be zero.

Cost	Amount	Markup	Total
3,544.38	3,544.38		3,544.38
3,924.38			3,924.38
			7,468.76

Forcing a figure into the "Amount" column.

The fastest way to fill in the Amount column for a *QuickBooks* estimate is to click on a number in the "Cost" column and change the figure by a penny. Continue clicking and changing costs by a penny until every row of costs includes a figure in the Amount column.

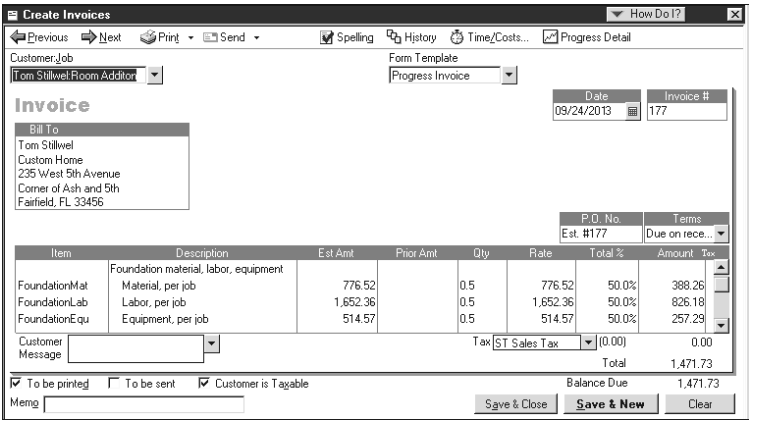
Turn an Estimate into an Invoice in *QuickBooks*

First, decide if you want an invoice for the whole job or for just part of the job (progress billing). If you prefer progress billing, click on **Edit**, click on **Preferences**, click on **Jobs**

& Estimates, click on **Company Preferences**, click on **Yes** under *Do You Do Progress Invoicing?* Click on **OK**.

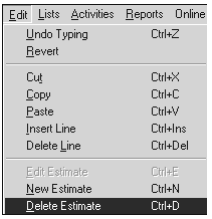
To create the invoice:

1. Click on the **Create Invoice** button at the top of the *QuickBooks* estimate screen.
2. Click on **Yes** to record changes to the estimate.
3. If you selected progress billing, enter a percentage or select items to be invoiced.



An invoice for the first half of the foundation work.

4. Click on **OK** and *QuickBooks* creates the invoice.
5. Make changes to the invoice if you want.
6. Click to print one copy for your file and another for your customer.
7. Click on **OK** when done. (Processing the file may take a little time.) *QuickBooks* reports will now include totals from the job just invoiced.

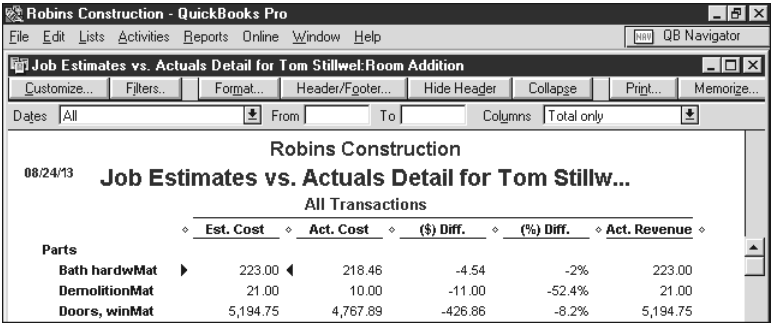


It's easy to delete an estimate.

Don't Worry About Making a Mistake

QuickBooks is very forgiving. Practice all you want. Experiment any way you want. Then delete any estimate or invoice to remove every trace of it from *QuickBooks*. With the offending estimate or invoice displayed:

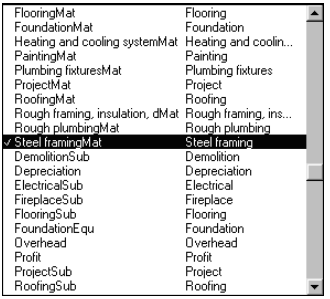
1. Click on **Edit.**
2. Click on **Delete Estimate** (or Invoice).
3. Click on **OK**.
4. The estimate (or invoice) is deleted.



Estimates vs. actuals detail.

Your Jobs in *QuickBooks*

- Click on **Reports, Company & Financial, Profit & Loss By Job** to see job income and expense.
- Click on **Reports, Company & Financial, Balance Sheet Standard** to see the new receivables total.
- Click on **Reports, Jobs & Time, Job Estimates vs. Actuals Detail**, select the customer and job to see a detailed cost comparison for the job. Until you start paying bills, the Actual Cost column will be all zeros.

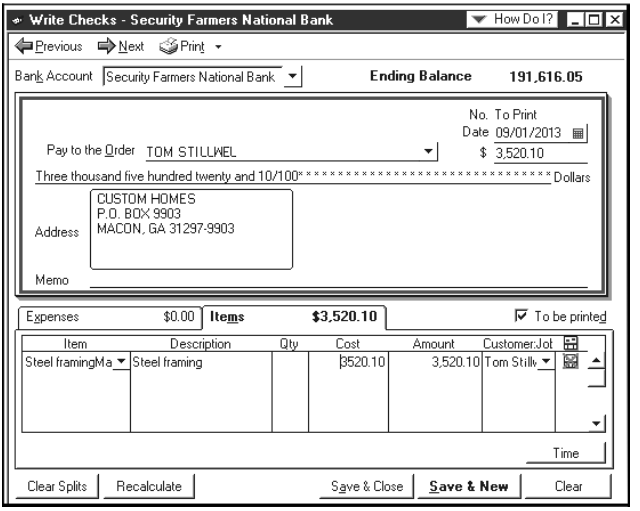


Select a cost category from the Item list.

Paying Bills by Cost Category

When you pay vendors and subcontractors, the amount paid is charged to the job and deducted from your bank balance.

1. Click on **Banking**.
2. Click on **Write Checks**.
3. Fill in the **Pay to the Order** line.



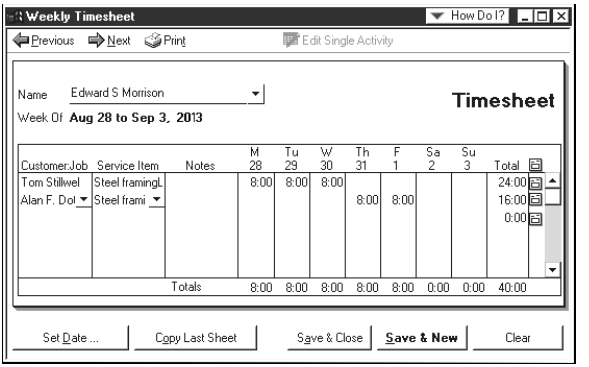
Paying a bill for the steel framing on the Stillwel job.

4. Click on the **Items** tab.
5. Click on the down triangle in the Item column of the check stub to open the Item list.
6. Select a *Mat, Sub* or *Equ* cost category from the Item list. These are the material, subcontract and equipment subtotal costs from your estimate.
7. Click in the amount column and enter the amount paid for the item described. Click on the down triangle under Customer:Job and select the correct customer and job.

8. This amount is not billable to your customer. So click on the icon representing an invoice to put a red X over the icon.
9. One check can cover items in several cost categories and even costs on several jobs. Click again on the next line down in the Item column and find the next cost item.

Creating Payroll by Cost Category

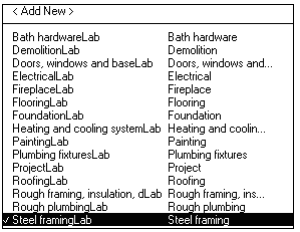
When you write payroll checks, the amount paid is charged to the job and deducted from your bank balance.



Fill out the timesheet by customer and service item.

1. Click on **Employees**.
2. Click on **Time Tracking**.
3. Click on **Use Weekly Time Sheets**.
4. Click on the down triangle opposite Name and select the employee to be paid.

5. On the Timesheet, click on the down arrow under Customer:Job and select the first job where the employee worked.



Under Service Item, select a labor cost category from the list.

6. Under Service Item, select a Lab cost category from the list. These are labor subtotal costs from your estimate.

7. Under Payroll Item, select the type of pay, such as hourly.

8. Enter the number of hours worked for that cost category.

9. Any timesheet can cover work done on several jobs and man service items.

10. When finished recording time for an employee, click on **Save & Close**.

To actually produce paychecks:

1. Click on **Employees** and then **Payroll**.
2. Click on **Pay Employees**.
3. Check the names of the employees to be paid.
4. When done, click on **Create**.