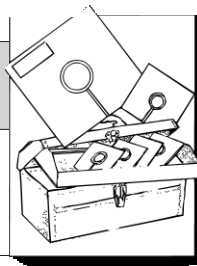


Flexible Estimating

by Patti and William Feldman



Few computer programs succeed in addressing all the needs of a particular business in one package. The rule is: The narrower the focus, the better. Yardi Systems' *The Estimator* concentrates on the office skill most fundamental to the construction business — estimating the project. It is designed to suit the needs of estimators in any segment of the business, from home builders and general contractors to remodelers and specialty contractors.

The Estimator culls the most useful features from spreadsheets, database managers, and word processors to produce a specialized package that helps you to bid jobs much faster and with greater flexibility than is possible with a pad and pencil. Unlike many other estimating programs, which force you to

follow a software developer's conception of how a contractor should bid, The Estimator allows you to customize the format so you can continue to bid your way. It adjusts to the level of detail you require: You can create precise takeoffs, or you can slot in just a couple of numbers to make quick "go/ no go" decisions.

The screen views are easy to understand. The main work area occupies the upper three quarters of the screen (see sample). Below this are a command line, from which you can choose among displayed options, and a prompt line, which gives you messages concerning the active cell in the main work area. The bottom of the screen lists the specific commands you can execute, in either command mode or data

entry mode, by hitting one of the first ten function keys. In data entry mode, for example, F3 pulls up the list of assemblies, and F5 displays labor classifications.

The program is actually a series of data entry forms set up to add together material items, labor rates, subs, vendors, and assemblies that you have established in the database. Each entry in the database is defined by one or more general categories, including materials, labor, assemblies, and intangible items (such as permits and insurance). There is a separate screen for each type where you can enter appropriate information.

There are several ways to handle materials costs. You can use items from the database, which holds up to four vendors for each item, each with separate pricing. The program automatically defaults to the lowest quote, but can be overridden if you want to select a different vendor. But it's not necessary to use the database if all you need is a quick overall price. Instead, you can enter the latest quotes from vendors directly into the bid. Subcontractors are handled this way, too, by adding them directly to the estimate. You can include quotes from up to three subs and, again, the program defaults to the low bidder unless you override it.

As the database of labor and material items develops, you can set up assemblies. Assemblies link materials to labor, either as a one-to-one or a many-to-many relationship. You can even compile master assemblies by combining several smaller ones.

You can define up to 150 units of measurement (such as "square feet" and "cubic yards"), and as many as 255 labor types, such as "helper," "carpenter," and "foreman," each with its own wage rate. You are also allowed up to 60 default markups, such as sales tax, overhead, and profit, which can be used in several different ways. For example, you can automatically add percentages or dollar values to either each bid line item or to bid totals. You can assign different markups to each category or apply one markup to all categories. And, in a format missing from many other estimating programs, you can show profit on client proposals as a separate line item or distribute it to all category subtotals.

The program prints "Requests for Bids" to send to subs and suppliers for any item identified as a subcontract item on the takeoff. The request will also specify a response date and an item delivery date. When you have decided which subcontractor's bid to go with for a particular item, just enter the vendor's code and print purchase orders.

Handy features include formulas to estimate roofs of various pitches, and to convert take-off units into order units (for example, square feet

of wall to gallons of paint). All items entered into the bid are also time stamped.

Material items are sorted by item number, following the 16-division Masterformat construction classification recommended by the Construction Specifications Institute. Items are easy to locate, even in a large database. By using the section number or by typing a word or phrase, estimators can instantly zero in on the desired section.

When preparing summary sheets, the program combines all like items by identification number, rounds up quantities line by line, adjusts for waste, and produces purchase order sheets with the total project quantities needed.

The Estimator is also handy for quick estimates — just put in the name of the item without the quantity and enter a lump sum price. This is especially useful when you don't want to use items from the database, or when you don't have a price breakdown from a vendor quote.

The Estimator has excellent, easy-to-print reports, including subcontractor bids, purchase orders, and price lists. The program will also print professional looking bid proposals for submission to potential clients.

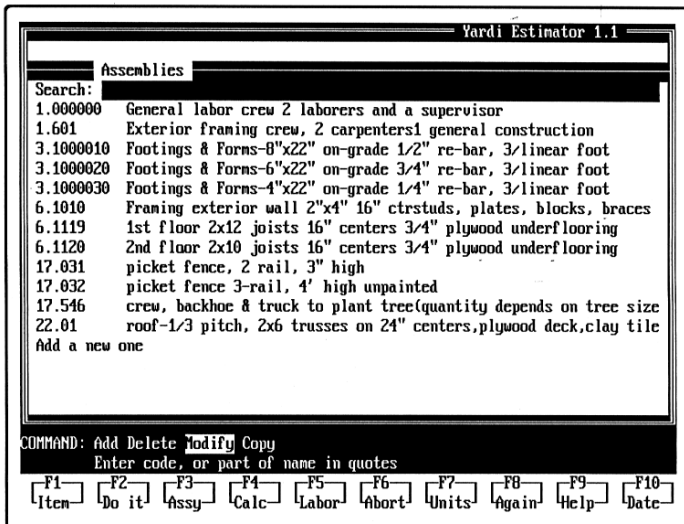
The Estimator integrates with Yardi's *Construction Accounting* (\$795), which combines job-costing, accounts receivable, and accounts payable in one program. An optional *Estimator Database* (\$295) provides materials and labor costs for residential, commercial, and industrial construction. It is a complete electronic listing of the data found in the current *National Construction Estimator* from Craftsman Books.

The manual for The Estimator is logical and written in plain English. The illustrations of the screen are faithful reproductions of what should be on the monitor at a corresponding point in the instructional text.

Unfortunately, the manual corresponds to version 1.0 and has not been updated to reflect the minor screen revisions in version 1.101. And the tutorial, while a solid first step, is overly elementary, proceeding through a sample estimate that is simpler than most real-life projects and is not sufficient to fully acquaint users with program operations.

Yardi has just instituted an "800" phone number for technical questions. This is not standard policy among most companies — many are, in fact, moving away from such a service. The free access is a real asset when you are first getting up to speed with the program and shows their commitment to after-sales customer support. ■

From their office in Chappaqua, N.Y., Patti and William Feldman frequently write about computers and edit the Construction & Computer Newsletter.



The command line shows the operations — in this case, Add, Delete, Modify, or Copy — you can perform on data in the main work area. A list of ten function keys and the actions each performs is displayed along the bottom of the screen.

Computer Bytes

Compuserve magazine recently listed files from its online Macintosh Systems Forum (GO MACSYS) that can help you convert to System 7. Here's a sampling of what's available:

7CO-MP.CPT. These six utilities include: *QuickFinder*, a mini-Finder and application launcher; *SuperFind* a find-and-replace add-on; *FKey Master*, a keyboard management program; and three utilities for working with aliases.

SYSSWI.SIT. System Switcher helps you switch between Systems 6 and 7.

7PACK.CPT. System 7 Pack is a MacUser magazine four-star winner that allows you to modify Finder's command keys, change Finder's date display, and more.

S-7SS.CPT. This program provides a startup screen for System 7.

DESREM.SIT. The *Desktop Remover* frees up hard drive space by removing the System 6 desktop file after System 7 is installed.

McNail Customizing, a \$100 add-on to McNail Estimating, prints price request sheets and has a command to calculate new unit prices. The program also allows users to customize their cost categories. Like other McNail software, the program requires Microsoft Excel, and is available for Macs as well as for PCs that run Windows. For more information, contact Turtle Creek Software, 651 Halsey Valley Rd., Spencer, NY 14883; 607/589-6858. — Sal Alfano