

Streamlined Spreadsheet Estimating

by Joe Stoddard

A recent survey revealed that as many as 80% of contractors who generate estimates and bids on computers are using their trusty spreadsheets instead of dedicated estimating software. One of the greatest pitfalls of spreadsheet-based estimating is having items “fall off the pad” — that is, forgetting to include items or even entire categories of work. An incomplete bid might win you the work, but before you can say “change order,” your wallet will be taking the hit.

To keep spreadsheet estimates on track, Quick Bid 2000 provides a comprehensive “checklist” of items across every phase of residential construction, and adds some basic reporting and construction documentation features as well. If you’re a spreadsheet estimator who has been meaning to get your estimating templates organized, you’ll probably find Quick Bid 2000 a great starting point.

The heart of the Quick Bid template consists of 11 tabs or worksheets which roughly follow the order of construction. To use Quick Bid, you’ll also need one of the major spreadsheet applications — Microsoft Excel 97, Lotus 1-2-3 (version 5), Corel Quattro Pro 8, or some other spreadsheet that will read one of those file types. Quick Bid doesn’t add any functionality to your existing spreadsheet application, so there is no install routine — just open the file and start filling in the blanks.

The Color of Money

Quick Bid uses a simple color-coding system to identify items that require user input. Unit costs are green, quantities are blue (see Figure 1). The easiest way to use Quick Bid 2000 is to run through all the sheets, modifying all the green cost items to reflect your local pricing. Then save the file with a new generic filename that reflects the date the prices were current, such as qb_122099.xls.

To create a custom bid, save the newly

updated template with a job name and start filling in the blue items with your job information and takeoff quantities. The black data on the spreadsheet will self-calculate based on your entries, and automatically fill in the Cost Break Down summary page (Figure 2, page 3). There is also a Cost Reconciliation worksheet, which is used to track change orders and allowance purchases.

A Few Rough Edges

The creators of Quick Bid 2000 are working contractors, not experienced software developers. That’s a good thing, because they’re using their own product in the real world. That puts Quick Bid heads and tails above the hodgepodge of spreadsheets many contractors get away with. But if Quick Bid 2000 is going to command a premium price, it needs

quite a bit of polishing. End users with spreadsheet experience could easily make these changes themselves, but that doesn’t help new users.

For instance, there is no effort to lock down the content of cells that do not require user input. Doing so would make it nearly impossible to mistakenly change or delete important information, while still allowing changes if deemed necessary by simply unlocking those cells.

There are also spots where the color-coding is not consistent. For example, the “Bid” worksheet breaks its own convention where user-completed cells are all being colored blue. This leaves the user wondering which fields they’re supposed to use for their company name and address. For the address, only one cell is linked to the other worksheets, but if you’re not familiar with spreadsheets

QUANT	UNIT	DESCRIPTION	COST	TOTAL
3900	SF	FRAMED SQUARE FOOTAGE	\$2.50	\$9,750.00
500	SF	SLAB ON GRADE SQ FT	\$1.50	\$750.00
0	SF	GARAGE & PORCH SQ FT	\$2.00	\$0.00
600	SF	BASEMENT SQUARE FOOTAGE	\$1.50	\$900.00
0	EA	INTERIOR ARCH OPENING	\$85.00	\$0.00
15	EA	EXTERIOR ARCH	\$85.00	\$1,275.00
5	EA	ARCH WINDOWS	\$75.00	\$375.00
2	EA	BAY UNDER EAVE	\$250.00	\$500.00
TOTAL HOUSE FRAMING ESTIMATE			\$31,380.00	
FRAMING AMOUNT PER FINISHED SQ FT			\$6.28	

Figure 1. Quick Bid 2000 is a spreadsheet template that uses a simple color-coding scheme to prompt users to enter costs (green) and quantities (blue).

you would never know which one. It would have been a simple matter for the developer to shade these fields and include some non-printing comments in adjacent cells to further guide the user.

More serious is the lack of information on how to customize the template or add items to the cost database. (Quick Bid does not actually use a database in the ordinary sense of the term, but rather a set of spreadsheet cells that constitute a "cost file" of sorts.) True to the company's promotional material, Quick Bid 2000 is "totally owner modifiable," but only for experienced spreadsheet users. Beginners are left entirely in the dark on how to add takeoff items or modify basic formulas. If the Quick Bid folks are serious about attracting new users based on "ease of use," they would do well to include a complete section in the manual or in online help screens explaining the ins and outs of creating new material and labor items, as well as instructions on how to manipulate summary formulas and report templates.

Money's Worth

Busy contractors need a simple, straightforward way to get estimates out the door, and generate basic materials lists and construction documents. I wanted to love Quick Bid 2000, and if it cost \$99, I could forgive its shortcomings and give it an unqualified thumbs-up. But the developers are asking \$449. That's \$150 more than Winest LT, which comes packed with hundreds of custom assemblies and a database of 20,000-plus cost items; it's *twice* the price of MacNail, Turtle Creek Software's spreadsheet-based estimating system, which by comparison is far more sophisticated and meticulously documented.

That said, \$449 is a fraction of what you'd pay a custom developer to build a comparable spreadsheet for you, and may represent good value if you're looking to streamline your spreadsheet estimating. For more information, contact Quick Bid (1558 W. Hillfield Rd, Suite 1, Layton, UT 84041; 801/985-0000; www.quick-bid.com).



New 3-D symbols for Chief Architect

The ChiefSymbols series of 3-D symbol libraries is designed for use with versions 5.0 and 6.0 of Chief Architect software. According to the developers, Cardiff Consultants Ltd., the true 3-D geometry means that as plans and designs are drawn, all elements are automatically created as "intelligent" 3-D objects. The package is reportedly the first third-party symbol library to be developed for the application since the release of the Chief Architect developers' kit last year. Included in the first series are 15 custom libraries, including Architectural Elements, Doorways, Logs, Millwork, Skylights, Staircase Components, Round Windows, and Diamond Windows. The skylights alone are worth the cost of admission. The 343-symbol library costs \$150 and can be purchased online at www.chiefsymbols.com.

Real Architect 2000

Real Architect 2000 is a new full-featured architectural program that runs in AutoCAD LT 98 & 2000. A straightforward graphical menu interface provides the tools necessary to produce full sets of working drawings, including floor plans, elevations, sections, and roof plans. One feature of the new release is the ability to automatically cut openings for doors and windows regardless of the number of lines contained in a wall. The add-in is \$199 and can be purchased directly from the publisher at www.realarchitect.com.

	A	B	C	D	E	F
1	MLR BUILDERS, INC					
2	100 East McBarley Creek Road, Whensilville, ND 10002					
3						
4	COST BREAK DOWN					
5						
6	BUYER:	James Farday	Finished Square Footage:	5000		
7	LOT:	234	Foot Print Square Footage:	2200		
8	Address:	West McBarley Creek Road	Bid Date:	12/20/99		
9	PLAN #:	3245				
10						
11	Cost Code	Amount	ACTIVITY DESCRIPTION			
12						
13	7100	\$3,500	PLANS			
14	7105	\$500	ENGINEERING			
15	7110	\$1,500	SURVEYING			
16	7115	\$500	PERMITS & FEES			
17	7120	\$0	OFF SITE IMPROVEMENTS			
18	7125	\$1,500	EXCAVATING			
19	7130	\$1,500	BACKFILL			
20	7135	\$1,800	IMPORT AND/OR EXPORT FILL			
99	7485	\$10,370	MARKETING	3.00%		
100	7490	\$23,000	CONST LOAN INT. & FEES	10.00%		
101	7495	\$6,913	DISCOUNT POINTS	2.00%		
102	7500	\$20,740	COMMISSIONS	6.00%		
103	7505	\$23,000	OVERHEAD	10.00%		
104		\$30,143	PROFIT	8.72%		
105						
106		\$375,672	TOTAL CONTRACT AMOUNT			
107						
108		\$69.13	Average Amount Per Finished Sq Ft (house only, lot not included)			
109						
110	DISCLAIMER \CBD \BID \CONC \FRAME \LUM \INSUL \F.CARP \ELEC \PLUM \HVAC \MAS					

Figure 2. Tabbed worksheets hold calculations for the various phases of a job. The Cost Break Down sheet (CBD tab) summarizes all other worksheets, and also automatically calculates profit and cost per square foot based on the contract price you enter.