Quick Estimator™ 2005 Getting Started Guide

This is just a basic step-by-step guide to setting up the **Quick Estimator™ 2005** program and creating an estimate. Not all the features are covered here and we are not going to go into detail about every task. You can access detailed help on each task using the built-in help file. Just press the **F1** key on the keyboard while working on any screen to access help for that screen.

Starting Quick Estimator™ 2005

1. After installation you can open the program by double-clicking the Quick Estimator™ 2005 icon on the desktop or by clicking **Start** > **Programs** > **Quick Estimator 2005** and then **Run Quick Estimator 2005.** If you are using the 30-day trial or you have not activated your copy yet, an activation reminder screen will be displayed. To use the program without activating it, click the **Use Trial** button.

   If you have purchased and received an activation code, enter the code in the **Activation Code** field and click the **Activate** button. Once you have activated the program, you will not see the activation reminder screen again

2. The next screen displayed is the **Startup** screen; this is where you will open a data file to use. You can open the most recent data file, open other data file, create a new data file or open a sample data file. You can use the sample data file as a learning tool and to try out the different features. When you are ready to start using the program for your own business you should click the **Create New Data File** link. You should give your data file a meaningful name. We suggest using your business name.

   DO NOT USE THE SAMPLE DATA FILE FOR YOUR BUSINESS. If you have to reinstall the program, the file would be overwritten.

   Once you have created your new data file, it will open and be ready to use.

Setup

1. The first thing you need to do is enter your company information. Click the **Setup / Tools** tab on the menu bar and then click **User Information**. Enter your information and optionally your logo.

2. Next click **Setup / Defaults** also under the **Setup / Tools** tab to setup how you apply taxes and to enter various default values.

3. Next click the **Lists** tab on the menu bar and go through the following items. Once you click on each item the display area to the right will display any items that you have already entered. Click the **Add New** button in the lower right-hand corner to add a new item. Remember you do not have to enter all the information at once. Just enter enough to get started and then build the lists up over time.

   - Employees
   - Suppliers
   - Cost Book Groups *(See next section for more information)*
   - Cost Book *(See next section for more information)*
   - Assemblies
   - Super Assemblies (Full version only)
   - Payment Terms
   - Warranty List
   - Introduction List

- Other Lists
  Customer Types, Project Types, Project Tasks, Lead Sources, Units Of Measure, Tax List

The **Cost Book** screen lets you store your own list of **Material**, **Labor**, **Subcontract**, **Equipment** and **Miscellaneous** items. These items will be available for selection when you are creating estimates.

You must at least add some items to the cost book before you can start estimating. Although not required you should setup cost book groups to help organize your cost book items. . *(Example: Wood products, steel products, concrete products.. etc.)*

Press the **F1** key on your keyboard while the **Cost Book** screen is open to get detailed help on using the screen.

Creating An Estimate

To create an estimate you must first create a customer and a project. Each customer can have more than one project and each project can have more than one estimate. So if you have customers you regularly do work for, you will only have to enter them once. Likewise if you need to create more than one estimate for a project you only have to enter the project once.

1. Click the **Main Menu** tab on the menu bar and click **Customers**. The display area to the right will display any customers that you have already entered. Click the **Add New Customer** button to add a new customer. Fill in the customer information and then click the **Options** button and select **Add New Project**

2. This will open the **Projects** screen where you enter the project information. Some of the information will already be filled in so just enter the rest of the information and click the Options button and select **Add New Estimate**.

3. This will open the **Estimates** screen where you create the estimate. Some of the fields may already be filled in, if you have setup defaults in the **Setup / Defaults** section. Simply add items to the estimate by clicking the button or any part of a blank line. Enter the quantity and the overhead, profit, taxes and estimate total will be calculated for you.

4. When your estimate is complete, click the **Print** button to open the **Estimate Print Options** screen. This screen is divided into two sections, **Customer Copies** and **Office Copies**. Choose a report from either section and click the **Print** button and select **Print**, **Preview, Email** or **Fax.** You are now ready to present your estimate to the customer.

You can also use **Assemblies** or **Super Assemblies** to create estimates. **Assemblies** are groups of related cost book items that you can add to an estimate as one unit. See **Assemblies** in the help file for more info. You can also import an existing estimate into a new estimate. This is useful if you have projects that are very similar. You can also setup estimate templates. You can create these for tasks you perform often and then import them into a new estimate. You can import more than one estimate or template into a new estimate. Both of these features greatly speed up estimating.

Job Tracking

When the project is complete you can enter the actual quantities for each item in the estimate by clicking the **Job Tracking** button on the **Estimates** screen. As you enter the actual quantities differences between estimated and actual costs are calculated.

If you want to track the progress of the project you can use the **Daily Diary** feature to enter daily activity. This will automatically update the **Job Tracking** for you.

Please use the built-in help file for detailed instructions on how to perform the tasks mentioned in this guide and for help on the other features not mentioned here.