AFTER YOU PURCHASE

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Your problems are solved. After several months of looking, you have made the commitment and have ordered what you feel is the best estimating software system available. Upon receiving the package, you install it in one of your computers, turn it on, and start turning out four or five estimates a day.

If this was only true…. As with every other investment that you make, full knowledge of the product must be realized before trying to use it. Without this understanding, you will be frustrated and never use the product to its fullest or, in worst case, not even use the product at all. Both Doug Palmer, president of Palmer Electric (Oregon) and "Buck" Autrey, president of Miller Electric (Florida) indicate that getting computer estimating on-line must be planned.

With projects as large as the Savannah River Project, and as small as re-lamping a tennis court for the City of Jacksonville, Autrey's company has been exposed to almost every type of electrical need possible. "With an organization as large as mine," said Autrey, "information must flow fast". You need the best estimating, job costing, and accounting software possible".

"When I bought our estimating system, my company was about a third of the size it is now", explained Palmer. "I only had four or five electricians working for me, and was basically doing everything - purchasing, estimating, and managing projects. After I set the system up, I literally doubled the size of my company. The software gave me the ability to do 40-hour estimates in 8 hours and with more accuracy and piece of mind. I stared winning a lot of bids with the estimating system, mainly because I was bidding on four times as many projects".

The plans that they worked out and implemented for these two companies, except for the size, were almost identical. Both companies realized the need to charge one person with the responsibility of implementing the program and the need to allow ample time by setting realistic goals, or steps.

Once the goals were set, begin the process by:

STEP 1

A. Prior to loading the program or turning on the computer, a call should be made to the software's support center. This introductory call is good for both you and the support team as you will be more comfortable knowing that there is a real person behind that 800 number and the support people will be advised that you are starting to work with the program.
B. Reading the manual and studying other instruction materials available.
C. Consider the schooling available

Most people just thumb through the manual and refer to it later on. You are normal if you don't read it. Schooling should be available, but may not be necessary. In any case, it is bettor to experiment with the program for a short period of time prior to attending classes.

STEP 2

A. Print out everything (items, assemblies, bi-products, F-Key controls, etc. if printouts are not provided with the program
B. Review printouts and compare prices, labor, labor codes, etc.
C. Bring up each item and review it for price, labor, etc.
D. Build one item from scratch

E. Build one assembly from scratch
F. Try range edits, block moves, etc.

It is imperative that you investigate the entire database area to the point that you can do anything that you want to without having to ask yourself "what do I do next?" After completing step 2, practice all of the functions so that your moves are reflexes. (one exception might be that if your program has user definable specifications for items, assemblies, reports, etc. You would then wait until you understand the program and your needs more fully before making changes)

STEP 3

Now that you have completed step 1 and 2:

A. Work with jobs (set up, delete, backup, etc.)
B. Review Systems (bid packages, buildings, floors, etc)
C. Experiment with Extensions (Breakout outs, job cost totals, change reports
D. Review the Bid Summary

When you feel familiar with the setups and extensions, go to the part of the program where you spend 90% of your time estimating, Takeoff. Learn in this area how to review/edit items and/or assemblies, change systems, set scale, make comments, etc.

After this is mastered, start working with the actual takeoff. Count items, count assemblies, jump from one item to a different one, Jump from one assembly to another, etc. With the probes (if your program has them) roll material lengths and enter item counts. Again, once comfortable with the program, your reflexes will allow you to move quickly.

STEP 4

Now for the big step, make some takeoff:

A. Make a small takeoff
B. Make another small takeoff
C. Takeoff a small job and check it against a manual takeoff

For your first takeoff, I advise using the example of 5 of one assembly and 100 of another. Takeoff this example and extend it. Do you really have all the bi-products that make up the two assemblies? Are the totals correct? Make another takeoff, this time breaking it into two systems. Extend the first system, then extend the second, and then combine them into one. When you feel good about this, do a small takeoff and check it against a manual takeoff. How does it compare?

STEP 5

Now for the real takeoff

A. Make a real estimate
B. Make another one

You are now on line.

As Both Buck and Doug will attest, purchasing an estimating program and getting "on-line" can be very rewarding if you set up and follow a plan. If you don’t, you will become confused, upset, and discouraged. The implementation of computer software is always a "Catch 22". However, once it is in place, you will have a tool that will continue to reward you time and time again in the years to come.