



# RELEASE NOTES

## V.26.3.1 | APRIL 2026

Thank you for taking a moment to review the McCormick Systems V.26.3.1 release notes. This release will update your software to McCormick Systems V.26.3.1.

If you have any questions during the update process, you can contact McCormick support at (800) 444-4890.

## MCCORMICK V.26.3.1

### SYSTEM

#### Software Maintenance

- An error occurred when attempting to merge fields in proposal sheets. 245895

## MCCORMICK V.26.3

### FEATURES

Quantified lists of the items/assemblies featured in the Assembly Report and/or the Items & By-products Report will now be available in the Proposal Sheet

Extension	Base Bid
Field	Default Assembly QTY Report Item and ByProduct QTY

Description	Quantity
4/S 1/2" DEEP 1G MUD RING	100.00
BOX SUPPORT-STUD CLIP	100.00
DUPLEX 15A RECP. STANDARD	100.00
GROUND SCREW/#12 PIGTAIL	100.00
1G IV PLAS DUPL RECP PLATE	100.00
4/S BOX 1-1/2" DEEP	100.00
<b>Totals</b>	<b>600.00</b>

Line Item Detail for Base Bid		
Description	Quantity	
DUPLEX STD		100.00
<b>Totals</b>		<b>100.00</b>

## BID SUMMARY

### Software Maintenance

- The Bid Summary Report showed incorrect values when the extended fields were edited. 229338
- In certain instances, the Bid Summary Report did not display all sections when printing. 218550
- When the "Totals by Grouping" format was selected, the *Remaining* field displayed with the "\$" unit and showed a value of "0." 226527
- Items grouped in the Extension window split apart when sent to the Proposal Sheet. 225040

## CHANGE ORDER

### Software Maintenance

- An error message displayed when selecting a *Report Option* checkbox in the Change Order Report. 227256

## DEP

### Software Maintenance

- When hovering the cursor over the takeoff, associated display data did not appear. 226313
- An error message displayed when attempting to logout with items not assigned DEP-specific settings. 225275
- In certain instances, drawings previous locked with labelsets no longer showed as locked when viewed by a different user. 170100

## EXTENSION

### Software Maintenance

- When pasting a job with the *Extension Data* checkbox enabled, the report format reverted back to "Price 1 & Bid Labor by Cost Code." 221002
- Substitution DCI codes were applied to all vendors, causing price updates to fail. 222315
- A stack overflow error occurred when an extension had numerous labels in *Column 1*. 232150

## HYBRID

## Software Maintenance

- The application crashed when attempting to insert an image with a drawing tool. 225221
- In certain instances, an error message displayed when attempting to delete an Extension or Other Cost of a Bid Summary. 226245
- Dates returned from the API did not match a user's international date formatting. 231903
- Users were able to paste or move takeoffs into a deleted labelset, causing errors in the Audit Trail. 224973

## MCCORMICK V.26.2

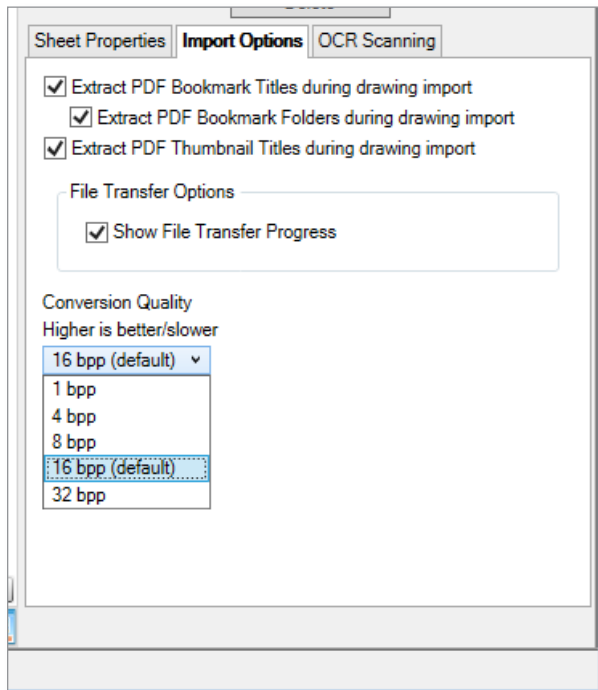
### FEATURES

---

- Added the *Conversion Quality* setting to all McCormick platforms. 21488

This release introduces the ability to lower color conversion quality for images. This feature does not impact the resolution of images, only the color depth.

The *Conversion Quality* default setting has been lowered to "16 bpp." This change will reduce the file size with no noticeable reduction in quality. This setting can be changed at your discretion.



## BID SUMMARY

---

### Software Maintenance

- An error occurred when attempting repeated deletes of bid summaries after creating summaries in Extension. 155879
- An error occurred when deleting newly created summaries in the “Manage Bid Summaries” window. 155899
- An error pop-up appeared when opening Bid Summary Report after sending an improper report type to Bid Summary. 213923
- Overhead percentage was not correct when combining two bid summaries with different percentages. 214747
- Multiple entries appeared for the same label when separating costs. 215605
- The Bid Summary Report did not update after cost codes were changed in Extension. 218380
- The *Labor Hours* data added from the other cost tabs were not being shown in the *Top Sheet* section of the Bid Summary Report print preview. 220022

## CHANGE ORDER

---

### Software Maintenance

- Fixed an issue with general performance and runtime. 210329
- The Change Order Report creation timed out, forcing users to close and open it again. 210330
- Removed unnecessary information from the *Job* column. 210331
- The *Bond Value* data was not included in the *Final Amount* of the Change Order Report. 212117
- The application crashed when reopening the Change Order Report after updating cost values in Bid Summary. 213229
- Removed the *Total* field from the *Qty* column of the Change Order Report. 214846
- Fixed an issue where the customer address incorrectly pulled from the *Job Address* field. 214849
- Reopening Change Order after being minimized and closed resulted in an error. 216214

## DEP

---

### Software Maintenance

- When copying and pasting a text box, it did not paste at the expected location. 207299
- When copying and pasting an arrow or line annotation, it did not paste at the expected location. 207706
- Labels from position “10” and onward were not sorted in ascending/descending order in the Legend List. 213927
- The order of labels in the *Labels* filter becomes unsorted when more than 10 labelsets are used. 213933

- DEP Help failed to display content. 213934
- When *Round to the Next* and *Multiplier* were enabled in Preferences, unexpected values occurred. 214092
- The *Exclude Items with Takeoff* checkbox disabled itself when double-clicking the Search Result icon. 216551
- Autocount search results were deleted, despite selecting [No] after selecting [Delete]. 216782
- Corrected a misspelling in the Confirm Deletion prompt. 216785

## EXTENSION

---

### Software Maintenance

- Removed an unexpected pop-up. 142317
- The Parent value of labor item appeared incorrectly when the price for same item was set to X (Exempt). 208556
- A program error occurred when sending an Item or Assembly report type to Bid Summary. 213627
- The *Extended Price* field in the "Items" tab displayed incorrectly after viewing the Print Preview. 216776
- A pop-up incorrectly appeared when opening the Print Preview after setting the *Material* filter. 217253
- Deleting a value in a field did not restore the previous value after clicking outside of the program. 217254
- When the "Manual Cherry Pick Price" option was selected, some prices in a column were still not selected after performing a price update. 219076
- A blank extension appeared after temporary parts were updated with a specific DCI code. 219162
- The Print Preview sometimes had missing item details after being sent to Bid Summary. 220718

## SYSTEM

---

### Software Maintenance

- An Invalid prompt appeared in the Formulas window when selecting a formula using ABS. 152700
- An Invalid prompt appeared in the Formulas window when selecting a formula using "AVERAGE" or "AverageZ" function. 152702
- "DEP Specific" tab failed to show a new DEP layer when Takeoff windows were open. 215156
- Fixed an issue where Extension crashed after separating labels. 218438
- Fixed an issue with TraserSX SDK price updates. 221207

# MCCORMICK V.16.3.9

## FEATURES

---

With an incredible boost in performance, this update is highly recommended for the best user experience.

Areas improved by this performance boost include:

- Extension
  - Range edit speed, deleting and creating extensions, launching Extension, and more.
- Bid Summary
  - Launching and closing Bid Summary and changing summaries.

Adjusted Calculations have also been added to the Bid Summary Report.

## BID SUMMARY

---

### Software Maintenance

- After editing values within the “Other Cost” tabs, the Bid Summary Report printed with blank pages between Cost sections. 190443
- The Breakout filtering did not work and the Extended Price and Cost Codes displayed incorrectly in the Bid Summary Report. 190514
- When the *Edit Labor Groups* checkbox was disabled in Security, attempting to edit Labor Group values resulted in a looping security prompt and made no changes. 190691
- Altering the first *To* value in the “Bond” tab into a large value caused a looping error message. 191146
- The *Overhead* and *Profit* data did not appear in the Sell Price of the Bid Summary Report when the “Print Grouped Bid Summary Sections” layout was selected. 195956
- When two labels within the same column had the same name and one was disabled, both labels still showed in the Bid Summary window. 203190
- Incorrect values appeared when breaking out by a new list value with takeoff that doesn't have a value set. 205889
- An error message appeared when attempting to add a new other cost to a copied job. 206514
- Fixed a cosmetic error where labels were incorrectly displayed when separated. 208901
- In certain instances, an error message occurred when attempting to create new costs. 212667
- *Overhead* and *Profit* values were removed when sending an Extension to Bid Summary. 213267
- *Reminder* checkboxes were incorrectly disabled after sending an Extension to Bid Summary. 210356

## CHANGE ORDER

---

### Software Maintenance

- When *Use Bond Table* was enabled in Calculations, the *Final Amount* on the Change Order did not reflect the *Sell Price* in Bid Summary. 206023

## DEP

---

### Software Maintenance

- Cutting and pasting multiple text boxes resulted in overlapping and incorrect placements. 27432
- Takeoffs in scaled regions could not be moved within the region. 134663
- The application would unexpectedly crash when entering information in the *Display Format* field under the "OCR Scanner" tab. 191346
- Scrolling with the mouse wheel did not work in the *Filter* dropdown. 191645
- Keyboard Shortcuts allowed duplicated keyboard assignments, causing some shortcuts to not work. 194330
- The Add Byproducts prompt showed the same name for different byproducts when adding them. 196121
- The Delete prompt failed to appear when attempting to delete an imported drawing in the Job Details window. 199750
- When copying and pasting a drawing in the Job Detail window, the drawing did not display on the thumbnail. 210707
- The application would unexpectedly crash when the [Add Search] button was selected after clearing criteria. 210750

## EXTENSION

---

### Software Maintenance

- When clicking outside of the Extension window after sending an Extension to Bid Summary, the successful pop-up message appeared outside the window. 142747
- The print preview incorrectly showed cost codes if they were manually expanded or collapsed. 188043
- When the Extension window was maximized, the side bar expanded and minimized the material list. 190432
- Fixed an issue where attempting to export an Extension to Microsoft Excel with a sheet name containing more than 31 characters caused the application to crash. 198961
- Altering the order of Byproducts did not reflect in the print preview. 206020
- The Labelset Removed prompt incorrectly appeared when no changes were made to labels. 208679
- An unexpected error message appeared when sending an Extension to Bid Summary and trying to view the print preview. 212513

## INTEGRATION

---

### Software Maintenance

- When adjusting the cost code of an imported part, the FOUNDATION Extension Report did not reflect the change. 192655

# SYSTEM

---

## Software Maintenance

- An error message appeared for users without access to the toolbar. 192656
- Fixed an issue with restoring certain jobs. 194042
- When a new user was added to a Estimator group, the Find/Sort function did not show all available options. 210367

# MCCORMICK V.16.3.8

## FEATURES

---

We've brought back the ability to use negative multipliers in Extension, which is used to remove material from a larger bid. 116779

<input checked="" type="checkbox"/> Bid Package	Separate v
<input checked="" type="checkbox"/> Base Bid	1
<input checked="" type="checkbox"/> Alt 1 - Deduct	-1
<input checked="" type="checkbox"/> Alt 2 - Add	2

Bid Summary now has tooltips to display the calculation used when you hover over the title of a formula. 154553

Total	
Raw Cost	\$17,720,637.54
Tax	\$1,594,605.38
Raw Cost w/ Tax	\$19,315,242.92
Overhead	\$1,772,063.75
Total Taxed Dollars + Total Non-Taxed Dollars + Total Tax	
Total Return \$	\$3,721,333.88

## BID SUMMARY

---

## Software Maintenance

- Fixed an issue where a redundant child row appeared in an "Other Cost" sub-tab. 175398
- *Labor* and *Material* values failed to display in the Proposal Sheet. 177402
- The *Req* column displayed "N" instead of "Y" after merging. 179266

- When selecting an option on the left-side panel of a Proposal Sheet using the <Enter> key, an error would display. 179534
- The *Total Mat.* total on the Proposal Sheet was missing a "\$" before its value. 182416
- An error message displayed when two or more selected reports had duplicate names and [Recap Report] was clicked. 183624
- When changing the order of values in a cost, the Bid Summary Report failed to show the updated order. 175196
- When renaming values in the "Burden" tab of a Labor Group, certain areas did not update with the new value names. 184227
- When the *Weighted* column was disabled, the *Mult* column values incorrectly shifted to "0." 184437
- Increased the speed of adding new supplier fields to "Other Cost" tabs. 202889
- When the *Weighted* column was enabled, the *Mult* column value was set to "0" instead of "1." 170522

## CHANGE ORDER

---

### Software Maintenance

- After merging a Change Order Report, the *CO Status* incorrectly displayed a number in the Proposal Document. 176061
- The *Percent Accepted* column in the Show Change Order window incorrectly displayed "100%" as "1.00%." 176981
- The *Tax Rate %* column on the Comprehensive Change Order Report showed three digits after the decimal point instead of two. 182417
- The Report Preview screen failed to load when "Change Order" was selected for *Report Templates*. 183219
- The Comprehensive Change Order Report displayed incorrect pricing for extended items. 199572

## DEP

---

### Software Maintenance

- Drops did not reflect the value selected for *Drop Override* in the Job Information window. 160271
- Fixed several crashes related to multi-user occurrences. 196978
- When multiple users were inside the same job at the same time, label locks set by one user did not immediately appear for the other. 170100
- After a region was deleted in the Audit Trail, clicking the [P] button for Takeoff caused DEP to shut down unexpectedly. 185433

## EXTENSION

---

### Software Maintenance

- Fixed an error when receiving an incorrect unit and compare code during Price Update. 198960

- Corrected the Unable to Update Quantity alert prompt, changed “Update” to “Overwrite.” 169237
- Users in the Estimator Group were unable to unlock exclusive lock extensions from copied jobs. 172039
- In the “Assembly Unit Price 1” preview, the *Labor Factor* and *I/BP/A* columns displayed incorrectly in child rows. 177012
- An error occurred when attempting to send an Extension to Bid Summary with multiple labels named “Combined.” 18072
- Fixed an issue with Item display when *Material Filter* was set to “Quote by Labelset.” 181562
- When the *Assembly #* column was hidden in an Assembly Report, values appeared under the wrong columns. 183829
- When an Extension was sent to Bid Summary after the [Copy] button was selected and cancelled, a redundant *New Bid Summary* field would appear. 186147
- Adjusting the quantity of a label to “0” failed to immediately reflect. 196784
- Labels with the same name automatically combined instead of showing separately. 199184
- Fixed a cosmetic error where labels were incorrectly displayed when separated. 208525

## INTEGRATION

---

### Software Maintenance

- If *Breakout in Bid Summary* was enabled, the FOUNDATION export showed incorrect tax per cost code. 198247

## SYSTEM

---

### Software Maintenance

- Reduced the processing time of deleting a job in a large database. 202477
- Removed old Windows PowerShell 2.0 requirement. 198409
- When creating a new job from the landing page, an error message displayed, but the application continued without successfully creating the job. 188752
- The ActivityLog table showed incorrect data. 188754
- Validation code was added to prevent permanent part deletion. 201539

## MCCORMICK V.16.3.6

## BID SUMMARY

---

### Software Maintenance

- In certain instances, the burden security prompt continually appeared and prevented the user from making changes. 184456
- *Adj Material* and *Adj Hours* showed “0” values when an “Assembly Unit Price 1” report was sent to Bid Summary. 183411

- When updating *Cost Code* values, the default values still showed on the Bid Summary Report. 175404
- When copying and pasting, the *Weighted* checkbox selections did not paste properly to newly created jobs. 176887

## DEP

---

### Software Maintenance

- Fixed an issue that allowed users to copy permanent parts from one job to another. 185114

## EXTENSION

---

### Software Maintenance

- Incorrect pop-up windows appeared in relation to the “Link” and “Unlink” functions. 183414
- ExtensionHistory table failed to clear after its associated job was deleted. 185044

## INTEGRATION

---

### Software Maintenance

- Detailed breakdown of *Labor Hours* showed “0” when a Bid Summary was exported. 181196
- Only the most current Bid Summary filter would export; remaining filters were stuck in the “Queued” status. 181199
- When sending a Job Material list to FOUNDATION, “FoundationPartNo” did not appear in the export. 178573
- When exporting to FOUNDATION, Overhead Tax amounts were included, resulting in overstated values. 178575
- “CostCode” would not update in exports after editing an extension. 177390

## SYSTEM

---

### Software Maintenance

- Fixed an issue where the *Alert Date* field in a Change Order Report was difficult to update. 154590
- Security settings for Restricted Groups failed to stop users from making changes in Item and Assembly Specs Edit Extensions. 178712
- Cost codes updated from Excel failed to display in Extension and/or Bid Summary Reports correctly. 188038

# MCCORMICK V.16.3.5

## FEATURES

---

### Performance Fixes

We looked at improving the speed of 13 different common functions in Extension and Bid Summary. Our testing ranged from a 1 million-dollar job to a massive 168-million-dollar job. On average, these functions are now twice as fast, with some of them 93% faster than before!

## BID SUMMARY

---

### Software Maintenance

- Fixed an issue where duplicate user inputs in the *Name* field resulted in incorrect displays in the Print Preview. 147923
- Fixed an issue where *Cost Code* and *Labor Hours* displayed in the Print Preview, even when disabled. 155908
- *Overhead %* and *Profit %* inputs failed to copy to other extensions. 159011
- *Adj. Material* and *Adj. Hours* reset to 0 when copying from a Bid Summary to an Extension. 159432
- When two summaries are routed from the Extension window, the second Bid Summary Report displays incorrect values. 182663
- Fixed formatting of table size to allow for more bid summaries to be selected. 169298
- Fixed an issue where *Reminder* checkboxes were disabled after an Extension was sent to a Bid Summary. 169375
- *Overhead %* and *Profit %* inputs failed to copy from bid summaries with combined labelsets. 172130
- Fixed an issue where the *Mult* column value incorrectly defaulted to 0 when a new "Other Costs" tab was created. 172149
- Fixed an issue where the *Overhead %* value displayed 0 after copying a Bid Summary and redistributing labelsets. 175439
- Error occurred when a bid summary was loaded twice. 176214
- When the *Other Cost* column is renamed, it is incorrectly moved to the *Available* field in the Recap Report. 157054
- When printing a Recap Report, *Bid Summary Description* details were truncated. 162356
- *Labelset* combinations without takeoff displayed in the Recap Report. 183042
- *Extension* dropdown disappeared for 3K users when a pop-up window was opened. 175269

## CHANGE ORDER

---

### Software Maintenance

- Removed unnecessary selections from *Change Order Fields* dropdown. 21532

- Change Order *Price* incorrectly displays in the Change Order Report when “Sell Price” is selected. 163206
- Adjustments to a Change Order Report do not display when using the [Edit Change Orders] button. 163227
- Error Report pop-up appears when more than 52 characters are input in the *CO Description* field. 155068
- Error occurs when attaching a Bid Summary to a Change Order that was not previously linked. 158256
- Error occurs when attempting to create a new Change Order Report after a Bid Summary is attached to the Change Order. 169231

## DEP

---

### Software Maintenance

- Fixed an issue where the *Sheets* dropdown remained on top of other windows. 57737
- Fixed an issue where the total for a legend incorrectly displays disabled filters. 134121
- Fixed an issue that split takeoff entries within the legend. 138898
- Fixed an issue where drop details appeared behind vertical lines. 148145
- Fixed an issue where drops disappeared when a line attached to a route was moved. 161291
- Fixed an issue where an item icon would not update with correct Takeoff display settings when linked to information imported from Excel. 169548
- Labelset locks did not appear for all users when a drawing was opened by more than one user at a time. 170100
- Fixed an issue where cutting and pasting a folder within the Details window caused the folder to disappear. 157231

## EXTENSION

---

### Software Maintenance

- Fixed an issue where the expander bar would shift off screen when a user expanded labels. 96815
- Fixed an issue where a Labelset Removed pop-up prompts the user to redistribute when going from combined to separate labels. 145868
- Fixed an issue where the *Cost Codes* did not display when *Material Filter* was set to “Quotes by Labels.” 149268
- Application crashes when the Extension window is closed directly after opening it. 155517
- Fixed issues with quoted items in vendor price update. 155998
- Corrected the logging level used in Extension. 158032
- Fixed an issue where running an update for NetPricer resulted in the incorrect assignment of costs to parts. 158178
- Fixed an issue with running a price update when “No Substitution” was used. 158873

- Fixed an error that prevented printing with “Include Children” enabled in the setup. 159232
- Fixed an issue where *Unit Price* would not calculate in unlinked Extensions. 159256
- Labelset Removed prompt appeared behind other open windows. 160225
- When a user attempts to overwrite or update the quantity of a locked Extension, the wrong pop-up window appears. 164322
- Fixed an issue where a pop-up alert fails to appear when a Breakout group is missing due to a non-listed specification. 170243
- Print Preview failed to display all enabled [Cherry Pick Labor Name] user inputs. 173465
- Fixed the alignment of the Children headers and their corresponding value columns in the Assembly Report. 173476
- Fixed an issue where Update Quantity and Overwrite Quantity did not show changes to by products after the Extension was sent to a Bid Summary. 176652
- Faulty pop-up window appears in Print Preview after taking off one or more items in the Assembly Unite Price Report. 176989
- Separate labelsets fail to copy as separate in their copied extension. 175185

## SYSTEM

---

### Software Maintenance

- Fixed an issue where users could not enter values greater than 100 in the Range Edit Quantity window within the Audit Trail. 155273
- Jobs window opened when the landing page was closed with an active job. 155808
- Fixed an issue that prevented inputting 52 or more characters for a label name. 161614
- Change Order Alert Date failed to populate if an alert was scheduled for the day the user viewed the window. 169111
- Main Landing Page opened wherever the user’s cursor was located. 169890
- Fixed an issue where the Phase code list in McCormick Breakouts is sending all phases to FOUNDATION as Phase 1. 175927

## MCCORMICK V.16.3.3

## SYSTEM

---

### Software Maintenance

- Fixed an issue where attempting to send integrations to FOUNDATION resulted in an error message and the integration failing. 178927

# MCCORMICK V.16.3.2

## BID SUMMARY

---

### Software Maintenance

- Fix to prevent other “Cost” tabs from not calculating correctly under certain circumstances.178927

## JOB SCREEN

---

### Software Maintenance

- Increased the speed of job screen when loading a large number of jobs. 170308

# MCCORMICK V.16.3.1

## EXTENSION

---

### Software Maintenance

- Update Vendor Pricing: Fixed a problem where not all parts were being returned in the list. Previously, once a certain status was found on a part, the remaining parts would not be listed.
- App shutting down unexpectedly: Addressed an issue related to the Send To Summary and Unlinking Extensions functionality. Specifically, a linked extension was displaying unlinked report data, causing a conflict during the writing of unlinked reports, which led to the app crashing.
- Blank Extensions: Fixed the validation process that checks if a report has any sections selected. In previous versions, the validation retrieved the report from the installation (linked data) even when loading a linked extension, leading to a mismatch in report IDs. This mismatch caused the report to be null, and the validation attempted to check a property on the null object, resulting in blank extensions.
- Export Excel Print Preview Bug: Fixed the Export to Excel functionality.

# MCCORMICK V.16.3

## FEATURES

### Introducing the Landing Page

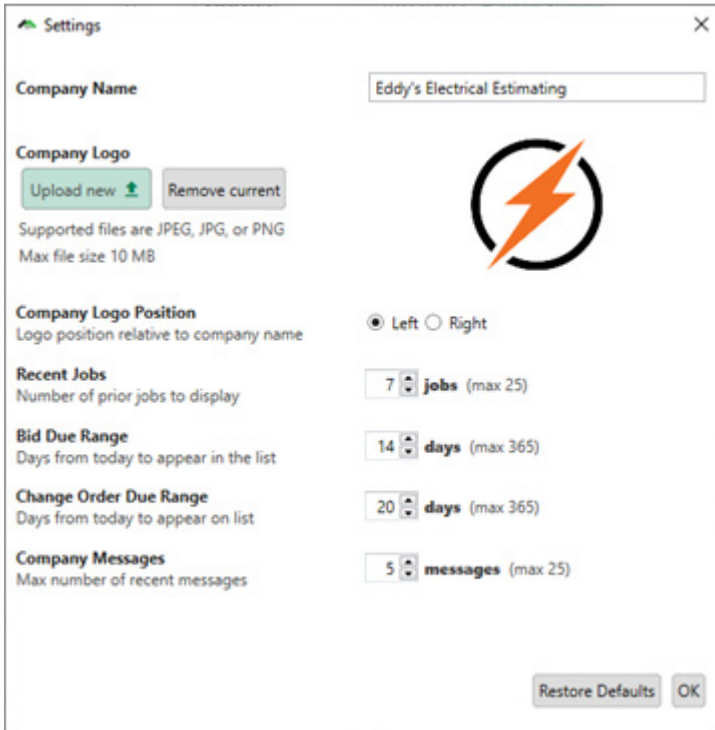
The Landing Page gives the users an overview of important tasks as you log in. This is fully customizable to your company needs, and this feature shows you various items such as the last jobs you were in, any bids coming due, and company messages you want to convey on login.

The screenshot shows a dashboard for 'Eddy's Electrical Estimating'. At the top, there is a logo with a lightning bolt and the text 'Eddy's Electrical Estimating', along with 'Settings' and 'Close' buttons. The dashboard is divided into several sections:

- My Recent Jobs:** A table with columns 'Name', 'Job No.', and 'Job Tab'. It lists six jobs: 149 W. Boston (Commercial), 4512 W Main (Residential), LOMAX Industries (Industrial), Harrison Building (Industrial), Flemming Manufacture (Industrial), and McCormick Business Park (Industrial). A 'Buckeye Surf Tools' job is also listed.
- Bids Coming Due:** A table with columns 'Date', 'Name', 'Job No.', and 'Lead Est.'. It lists five bids: Harrison Building (Est TD), Flemming Manufacture (Est1), LOMAX Industries (Est ABS), 4512 W Main (Est2), and 149 W. Boston (Admin). A summary bar shows '5 Bid(s)'.
- Company Messages:** A list of messages from 'Admin'. The first message is dated 2/12/2025 10:01:49 AM and says 'The parking lot is being resurfaced from 2/17-2/20. Please use parking garage across the street'. The second message is dated 2/12/2025 10:01:18 AM and says 'Pizza party Friday!'.
- Change Orders Alert Date:** A table with columns 'Name', 'Date', 'Job No.', and 'Lead Est.'. It lists three change orders: CO1 (02/14/2025, Job No. 5, Admin), CO2 (02/23/2025, Job No. 5, Admin), and CO 1 - A (02/27/2025, Job No. 23, Admin). A summary bar shows '3 Change Order(s)'.
- Current Users:** A list showing one user: 'Admin'. A summary bar shows '1 User(s)'.

At the bottom right, there is a checkbox labeled 'Show this page on login' which is checked.

The robust settings for the Landing Page allow you to customize the feature for your company's needs.



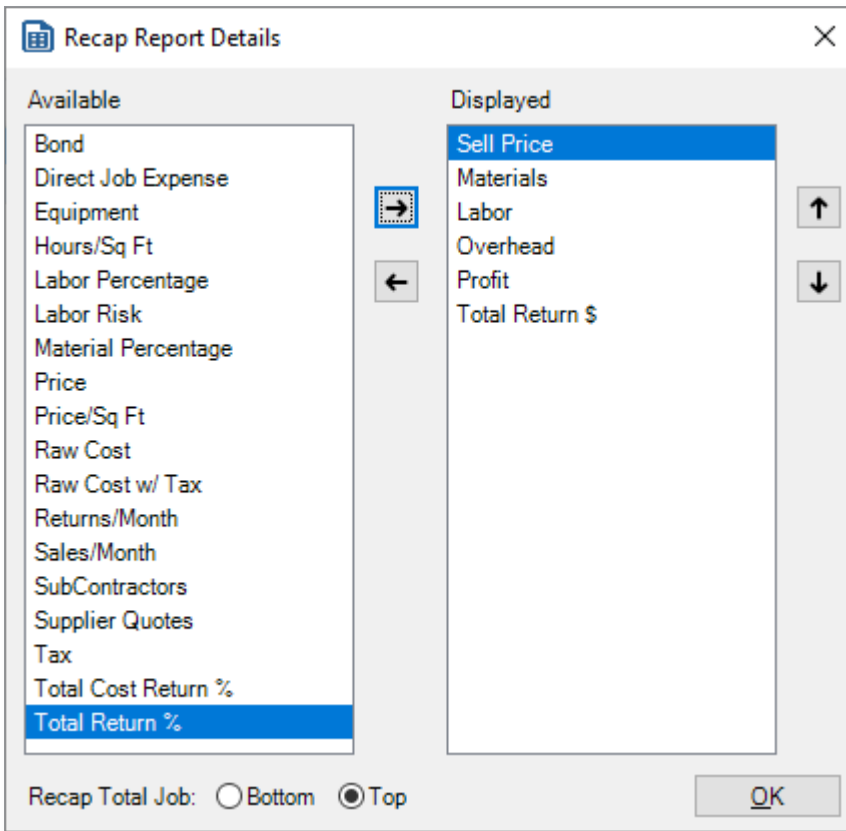
## Recap Report - Pro Only Feature

The Recap Report is a much-awaited feature that combines the power of our new ability to breakout label sets with bidsummary totals. Currently, you can view the sell price and other details for each breakout, but you cannot see them all at once. With Recap Report, you can view all this data at once. You can export this to Excel or include the chart in your proposal/bidsummary. This is also fully customizable to allow you to select which data you want in this report.

Recap Report is intended to be a quick summary or overview of critical data. If you have more than six columns, the printout may not look great, but the excel export can handle anything, just keep that in mind.

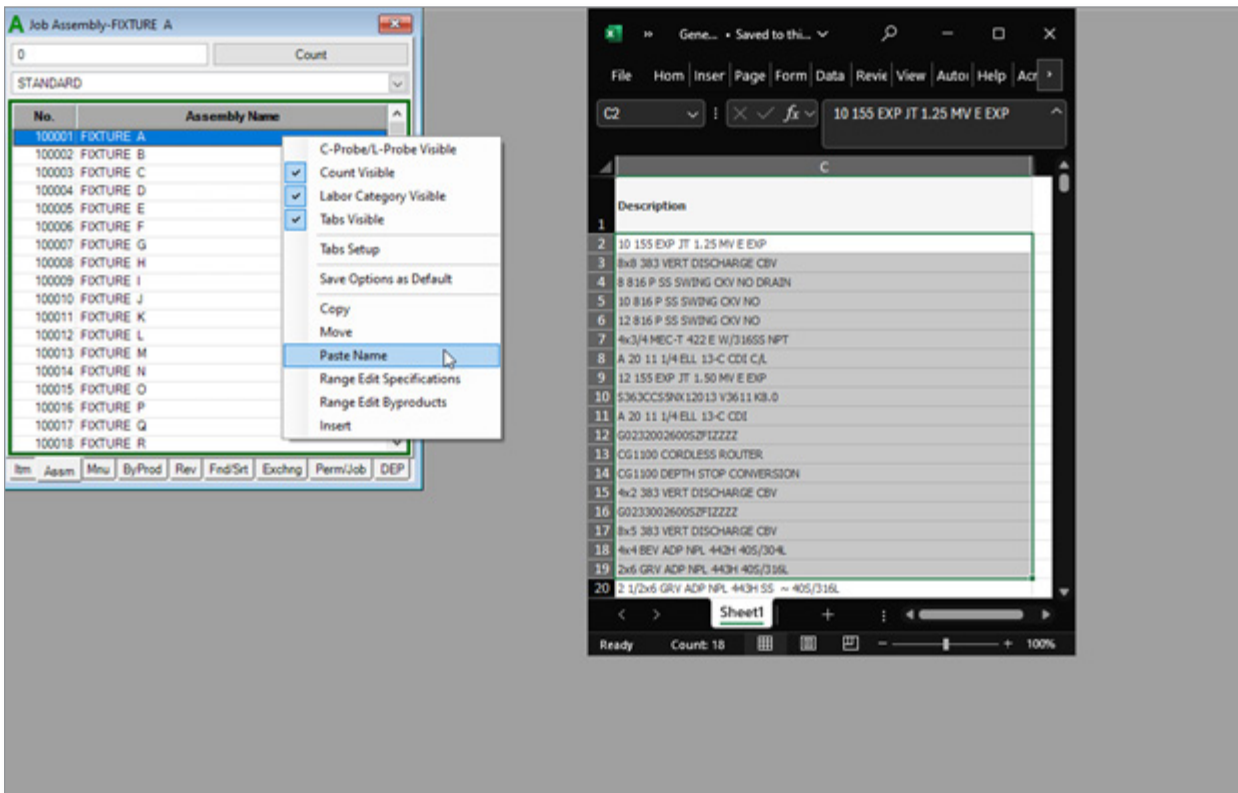
The screenshot shows a 'Recap Report' window with a table of data. The table has columns for Labelset, Sell Price, Materials, Labor, Overhead, Profit, and Total Return \$. The data is as follows:

Labelset	Sell Price	Materials	Labor	Overhead	Profit	Total Return \$
<b>Total Job</b>	<b>\$502,723.46</b>	<b>\$186,078.38</b>	<b>\$183,094.63</b>	<b>\$40,267.30</b>	<b>\$44,294.03</b>	<b>\$84,561.33</b>
Underground	\$77,921.97	\$43,949.42	\$9,513.19	\$6,137.49	\$6,751.24	\$12,888.73
Floor 1	\$120,422.88	\$41,196.85	\$48,075.39	\$9,668.90	\$10,635.79	\$20,304.69
Floor 2	\$131,879.72	\$44,561.36	\$53,342.17	\$10,592.60	\$11,651.86	\$22,244.46
Floor 3	\$150,858.22	\$48,044.78	\$64,676.70	\$12,137.11	\$13,350.82	\$25,487.92
Roof	\$21,640.68	\$8,325.97	\$7,487.18	\$1,731.21	\$1,904.33	\$3,635.54



## Copy Temporary Names from Excel into McCormick

Complicated fixture schedules or detailed assembly lists can now be copied from Excel directly into Temporary Fixtures with the option to auto rename the byproducts.



**Rename Temporary Names** [X]

You are about to rename the Assembly Temporary names of the following parts:

Begin: 100001      FIXTURE A

End: 100018      FIXTURE R

Rename Matching Byproducts

OK      Cancel

**Job Assembly-FIXTURE A** [X]

0      Count

STANDARD

No.	Assembly Name
100001	10 155 EXP JT 1.25 MV E EXP
100002	8x8 383 VERT DISCHARGE CBV
100003	8 816 P SS SWING CKV NO DRAIN
100004	10 816 P SS SWING CKV NO
100005	12 816 P SS SWING CKV NO
100006	4x3/4 MEC-T 422 E W/316SS NPT
100007	A 20 11 1/4 ELL 13-C CDI C/L
100008	12 155 EXP JT 1.50 MV E EXP
100009	S363CCS5NX12013 V3611 K8.0
100010	A 20 11 1/4 ELL 13-C CDI
100011	G0232002600SZFIZZZZ
100012	CG1100 CORDLESS ROUTER
100013	CG1100 DEPTH STOP CONVERSION
100014	4x2 383 VERT DISCHARGE CBV
100015	G0233002600SZFIZZZZ
100016	8x5 383 VERT DISCHARGE CBV
100017	4x4 BEV ADP NPL 442H 40S/304L
100018	2x6 GRV ADP NPL 443H 40S/316L
100019	FIXTURE S

Itm   Assm   Mnu   ByProd   Rev   Fnd/Srt   Exchng   Perm/Job   DEP

## BID SUMMARY

### Software Maintenance

- Totals were incorrect in combined summaries with markup tax overhead or profit. 133591
- Adjusted column width in *Other Costs* for easier readability. 135879
- A blank page appeared in Print Preview. 135883
- Changes to label name were not immediately displayed. 135984
- Print did not display updated order of costs. 137558

- “Other Taxes” tab totals sometimes appeared incorrectly on combined summaries. 137790
- Large numbers were wrapped incorrectly. 144086
- Error could appear in *Labor Total* row if no labor had been filled out in print. 145462
- Issues appeared in totals if a labelset combination with no takeoff was used. 145724
- Resolved unique scenario where adding Other Cost could result in error. 146051
- Long labels were cut off in *Labor* section of Bid Summary print. 149323
- Large Amount wraps to next line in Print Preview. 150460
- Labor Cost total in Bid Summary Report was sometimes incorrect after editing labor to “0%.” 153662
- Resolved issue with overhead and profit percentage copied to fields that do not contain values. 153673
- Profit and overhead percentages were sometimes incorrect after filtering. 154573

## CHANGE ORDER

---

### Software Maintenance

- An incorrect bid date displayed in Print Preview for change order. 131904

## DEP

---

### Software Maintenance

- Updates to shape title would not always update immediately. 132256
- Resolved issue rotating drawing in Job Details window. 134664
- “Route” was not selected when auto counting length takeoff. 140255
- Audit trail totals after resizing lines with DEP collapsed disabled. 143182
- Resolved issue renaming symbols in symbol designer. 148571
- Labelsets locked to a specific sheet were not locked to that sheet when pasted into a new job. 149132
- New drawing upload indicator did not always display in for Hosted users. 149908

## EXTENSION

---

### Software Maintenance

- You can no longer delete labels if they exist in an unlinked extension. 153888
- The “Material” tab would be incorrectly auto-selected when trying to select a different extension from the “Labels” tab. 112108
- Labelsets could overlap in Print Preview. 117261
- The header in extension may not have aligned with values below. 130195
- Both labor and price values were sometimes selected during a cherry pick. 133348

- % Ext Price and % Ext Hours columns may not have displayed in Print Preview. 135386
- Export to Excel did not display all decimal places shown. 135710
- Long report names were cut off in Print Preview. 137433
- Long labelsets overlapped footer in Print Preview. 137435
- Resolved some issues with range edit on price and labor with separated labels. 138277
- Incorrect prices were be highlighted. 138452
- Resolved some issues with MinZ formula. 143205
- Resolved some issues with Min formula. 143776
- The exclusive lock icon would not always display. 146026
- A crash would sometimes occur when unlocking a locked extension after attempting an edit. 147889
- Export to Excel or Print Preview showed decimal values for part number. 149066
- The dollar sign (\$) displayed in total for labor hours section of Print Preview. 149825
- Assembly number had decimal places in *Assemblies* section. 151990
- Print Preview would show incorrect takeoff order. 152924
- [Update Grouping] button may not display in "Assemblies" tab. 153147
- Removed unnecessary *CCode* column that could appear after applying material filter in extension. 153840
- Cost Code adjustment reverted after selecting [Update Groupings] button. 153904
- Adjusted unit was not highlighted in bold in Print Preview. 153905

## INTEGRATION

---

### Software Maintenance

- New costs could be incorrectly positioned in *Summary Pages* section of export. 131871
- The order of other costs would not always show in updated order in FOUNDATION export. 143214

## PROPOSAL SHEET

---

### Software Maintenance

- Word wrap in proposal sheet caused too many digits to appear. 150458

## SYSTEM

---

### Software Maintenance

- Newly created jobs did not always appear for other users in system. 89441
- Pasting extension reports from multiple jobs may not always display the correct reports. 106030
- Excel price update did not update all records displayed in *Matched* section. 149125

- List value would change to “None.” 150509
- Resolved issues with importing duplicate cost codes with parts import. 153847
- The Multiplier window was not set to “Always on top.” 153953

## MCCORMICK V.16.2.0

### FEATURES

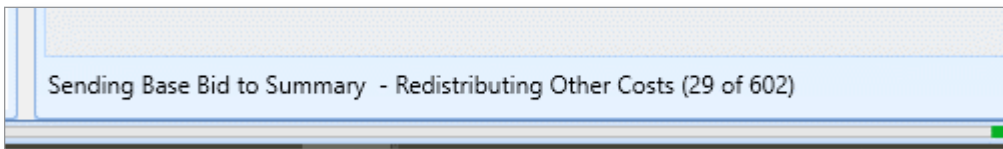
#### Performance Increases

We improved the speed of several areas in Extension and sending to Bid Summary.

In many of these areas we have cut the time in half, depending on the size of the job.

- Copy summaries
- Send to summary combined and separate
- Overwrite price on an unlinked extension
- Changing the material filter

In addition, we included more informative progress bars in Extension and Bid Summary.



#### Bid Summary Distribution Changes

In V16, we introduced the ability to split costs into groupings in the other cost screens of Bid Summary. Based on feedback, we adjusted how these costs are entered and displayed to make it much easier to use and understand.

- You can now directly edit the amount instead of adjusting the unit and multiplier.
- You can also directly edit the amount on grouped labels which will sum up to the top level.

For example, you can add quote amount per floor for Generators, and it will total without having to adjust the unit and multipliers.

Generator			\$0.00	1.00	\$4,100.00	\$0.00
Name	Labor Hours				Amount	
Underground	0.00				\$0.00	
Floor 1	0.00				<b>\$1,000.00</b>	
Floor 2	0.00				<b>\$1,100.00</b>	
Floor 3	0.00				<b>\$2,000.00</b>	
Roof	0.00				\$0.00	

- We added a *Remaining* column, where if you have a \$15,000 total job quote, you can manually add costs per floor, and this will let you know how much you have left to distribute, or if you have gone over the total quote. Similar to how the Labor screen works. The *Amount* is what carries over to the Bid.

Supplier Quotes							
R	Name	Supplier	Tax	Unit	Mult	Amount	Remaining
<input type="checkbox"/>	Switchgear	Graybar	<input checked="" type="checkbox"/>	\$15,000.00	1.00	\$15,500.00	(\$500.00)
	Name	Labor Hours				Amount	
	Underground	0.00				\$0.00	
	Floor 1	0.00				\$4,500.00	
	Floor 2	0.00				\$5,000.00	
	Floor 3	0.00				\$6,000.00	
	Roof	0.00				\$0.00	

- Proportional distribution still occurs if you add an amount at the top level, we no longer show the unnecessary Unit/Multiplier calculations on the lower levels.
- You can always turn back on the calculations through the Other Costs Maintenance screen by enabling the *Weighted* checkbox per tab.

## BID SUMMARY

---

### Software Maintenance

- Issues occurred when pasting bid summaries after deleting a bid summary.
- An error occurred when deleting all summaries from Bid Summary screen.
- Deleting all suppliers from the new Supplier Quotes window resulted in issues with closing the window.
- Issues occurred when resending to summary after disabling breakouts.
- Proposal Sheet - Issues using short codes in header.
- Tax rate did not display percentage without values in taxed fields.
- Reminders pasted from template jobs were lost when an extension was sent to summary.
- Bid Summary report did not use the *Extended* value from report.
- Bid Summary report displayed duplicate cost codes.
- Tax rate could show as incorrect when changing filters.
- An error occurred if the <Tab> or <Enter> key on the keyboard was selected while in the *Unit* or *Mult* field of the Combined Summary.
- The *Notes* field did not save text.
- An error occurred when opening the Bid Summaries report after copying.
- Exported Bid Summary Detail report formatting issues.

## CHANGE ORDER

---

### Software Maintenance

- The amount displayed in the *Markup* section could be incorrect.
- Failure to display saved report name in the Report Preview window.
- Grayed out text in the Report Preview after saving report.

- The incorrect price displayed in some circumstances.
- UI glitch in Comprehensive Change Order report preview.

## DEP

---

### Software Maintenance

- Issues taking off in scaled region after setting scale in job details for multiple sheets.
- Lines taken off as negative with drops had positive drop values.
- Printed PDF displayed in portrait instead of the set landscape orientation.

## EXTENSION

---

### Software Maintenance

- Issues occurred when exporting to Excel.
- Print preview showed incorrect takeoff order in Extension.
- Issues occurred when using material filters in specific reports.
- Updating a price with different pricing services removed previous updates.
- Totals at bottom of columns did not update if *Show Report Grouping* was not enabled.
- System crashed when opening a certain type of corrupted job.
- Issues occurred when sending to summary with *Breakout* set to "None."

## INTEGRATION

---

### Software Maintenance

- Foundation Export - An unnecessary alert occurred when adding budget exports to the queue.
- The *SummaryPages* section exported as *Default* in some cases.
- Stuck in *Queued* in certain cases.
- Cost codes with multiple extensions were slow to load.
- An exception occurred when selecting "Label" but not "Set."
- Budget exports failed when *Foundation Item Integration* was enabled.
- Errors occurred when attempting to save a job with budget exported from McCormick.

## PROPOSAL

---

### Software Maintenance

- Proposal Sheet - Supplier quotes were listed in the incorrect order on the Proposal table.
- System - Proposal Sheet errors occurred when merging extension data using "Current Filter."
- Proposal Sheet - Excess decimals appeared in *Other Cost*.

# SYSTEM

## Software Maintenance

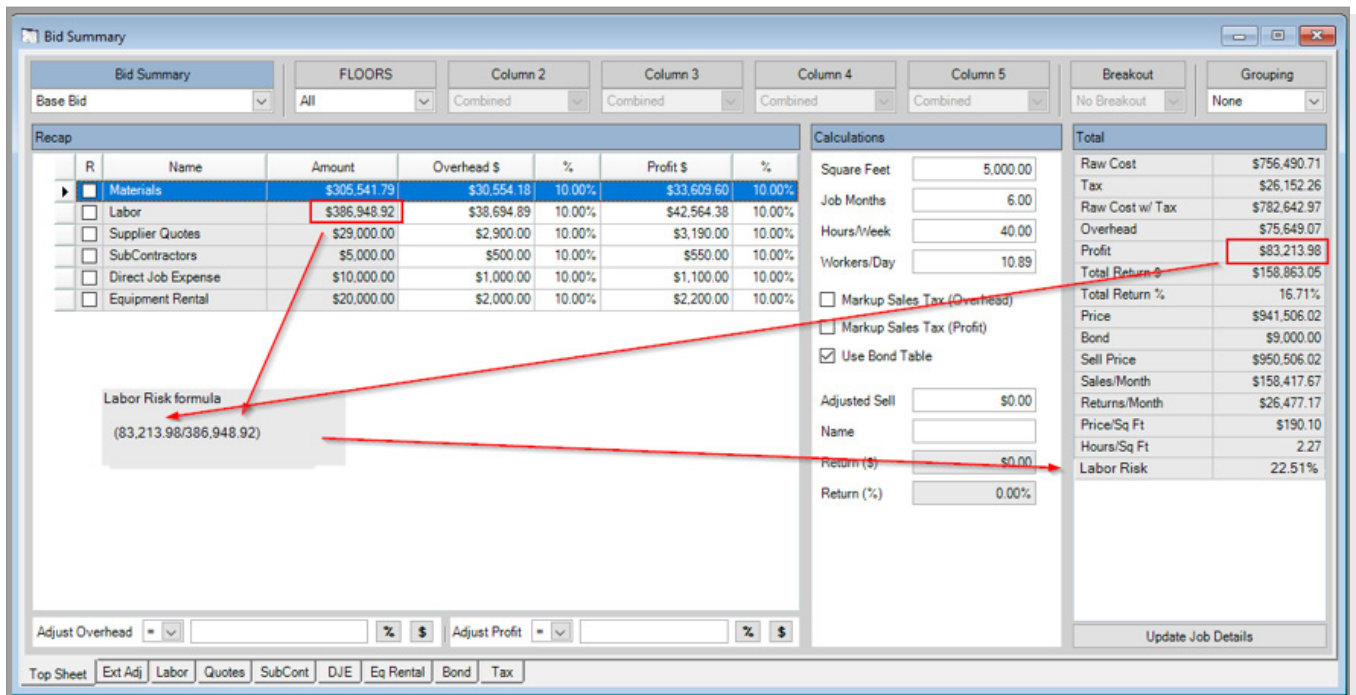
- Displayed "0" values for price per square feet and hours/square feet.
- An alert occurred when names with spaces were entered in the Add Specification window.
- Issues occurred in Excel Price Update when using *Item #* for match.
- The dollar sign displayed incorrectly in the Specs print preview.
- Error converting *Status* in Excel Price Update.
- Removed unusable formula functions.

## MCCORMICK V.16.1.0

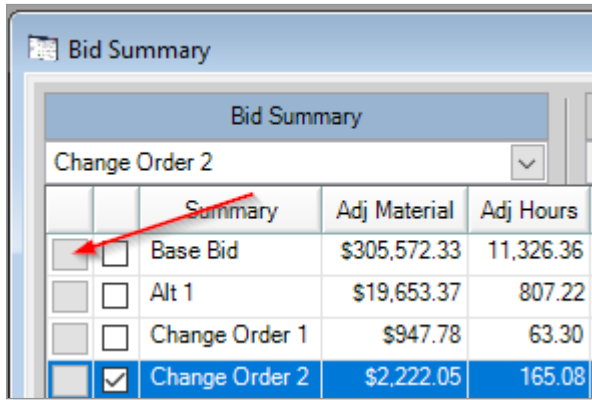
### FEATURES

#### Enhancements

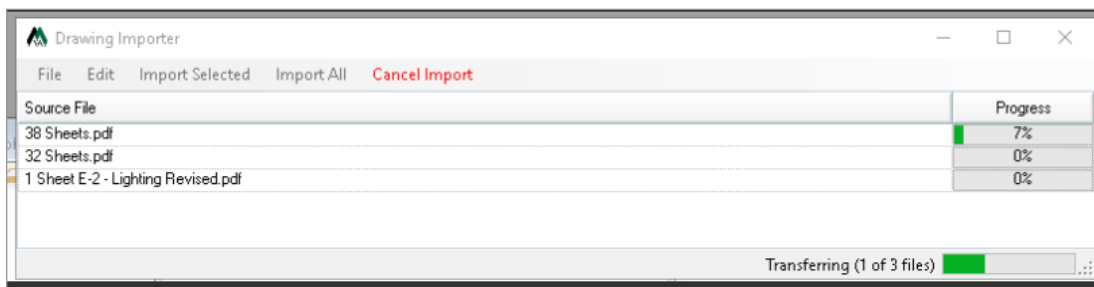
- Labor Risk. 108722



- Bid Summary select — Single click button to change summaries. Instead of select/deselect. 111215



- DEP Drawing load improvements — new progress bar! 51969



## BID SUMMARY

### Software Maintenance

- Fixed an error that occurred when refreshing data in the Bid Summary Report. 85645
- Leaving bid summary open and resending extension to summary did not refresh values. 91691
- Cost code could not be copied from extension 1 to extension 2. 101600
- The order of the *Cost Totals* section with *Expand Grouping* was incorrect. 112877
- The “Labor” tab may have displayed incorrect data after labor was edited in the “Ext Adj” tab. 114305
- Stopped being able to copy summaries into locked bid summaries. 115220
- Schedule predecessors not set after sending. 117008
- Issues occurred when pasting bid summary information into new job after creating new tab and costs. 123424
- Print preview displayed incorrect values after edited “Ext Adj” tab. 124026

## CHANGE ORDER

### Software Maintenance

- Errors occurred when opening change order in some databases. 90361
- Issues occurred when deleting a change order. 114239

- The *Totals* row was partly overlapped. 114387
- The “Comprehensive Change Order” option could not be selected. 117321
- Edits to quantity were not reflected in the Comprehensive Change Order Report. 117323
- Profit appeared as positive on negative change orders. 117732
- The *Selected Change Order Totals* area was slightly cut off and difficult to read. 125682
- An error occurred when creating a new Change Order report. 126038

## DEP

---

### Software Maintenance

- The *Defined Scale* dropdown sometimes did not close. 57206
- The Audit Trail did not update until it was closed/opened after replacing matching parts. 71813
- The Measuring Tool total was incorrect after adjusting with connected line. 96724
- Homeruns placed on a path with auto count did not attach to a path. 107711
- Display drawing content in the Hot List panel when clicking the Sort icon. 110732
- McCormick (Win3000) showed five labels in the labelset lock option. 116584

## EXTENSION

---

### Software Maintenance

- The Labor Hours and Price graphs did not display data. 91680
- Export to Excel had incorrect “Extended Labor” when multiple labor columns were used. 106175
- Extension reports failed to load if the spec name started with a numeric character. 106989
- The Vendor Price Update did not properly display the catalog number and manufacturer. 109240
- A new extension was incorrectly created after updating a vendor. 113612
- Issues occurred with print preview after repasting Extension reports into job with unlinked extensions. 113977
- Update/Overwrite price was not updating *Unit of Measure* for price 1. 115241
- The selected report during copy is not shown until extension is closed and opened. 115401.
- Graphs did not display data. 115610
- Users can now start a price with a decimal instead of zero then decimal. 116590
- Unable to click on the scroll bar to scroll labels when Extension is locked. 116821
- Price updates performed in Extension with a vendor were not pasted to new jobs when “Extension Data” was checked. 125978

## PROPOSAL SHEET

---

### Software Maintenance

- An error occurred when merging the template that includes the *Change Order* field. 106682
- The job name did not show on the proposal document. 106692
- Page summaries option did not display all data. 117006
- An error occurred when merging current filter in Bidsummary Proposal Sheet. 124275
- Incorrect labor values displayed in the total on Proposal table. 124889

## SYSTEM

---

### Software Maintenance

- Job attachments were not creating a copy of the attached file. 17385
- “Current Filter” exported the Cost Code using the default value. 94233
- Job screen — An error occurred when deleting a “Job” tab that was hidden and contained jobs. 98034
- System - Reordering lists in specs did not follow the spec being reordered. 102016
- Audit Trail — Swapped takeoff was placed into the selected label, not the original label when swapped takeoff was in multiple labels. 107656
- Jobs/Parts Import — Excel did not display the columns correctly as set. 109217
- Foundation Job Budget Export — Export values saved across Jobs. 109925
- System - Errors occurred when updating the price with an Excel file. 114704
- Attach File To System — Duplicate file when copying a file to job. 116772
- Log File — Added “Job deleted by.” 116999
- Labels — The labels order was incorrect after deleting a label that had been moved in the column. 106176

## MCCORMICK V.16.0.10

## EXTENSION

---

### Software Maintenance

- Edits were not pasted into a new job under certain circumstances. 116792
- Edits to quantity were not displayed in the BidSum report. 117604
- Edits were sometimes deleted after updating with a vendor. 117715
- Edits were lost when using “Update Price” or “Update Labor.” 123167

# MCCORMICK V.16.0.9

## BID SUMMARY

---

### Software Maintenance

- Save all BidSum values when BidSum loses focus. 64477
- The graphs section did not update in the order of the Bid Summaries that were changed in Manage Bid Summaries. 69749
- The *Total Return %* value on the second page of the Print Report did not match the value on Bid Summary. 73096
- Blank pages appeared in Print Preview. 85204
- When merging the document errors occurred on the Proposal Sheet. 85812
- There was a typo in the new "Supplier Quotes" window. 93501
- The "Totals by Grouping" in the *Other Costs* section was incorrect. 94540
- Changes made to the *Labor Class* order were not displayed correctly. 95607
- Issues using the scroll wheel to change sheets in Print Preview. 95695
- The "Reverse labels" option did not function. 95956
- Issue with displaying the total top container of an extension sent to Bid Summary when opening Bid Summary and Extension at the same time. 97720
- Cost changes did not immediately appear in the BidSum. 98472
- Print Preview displayed incorrect totals when tax totals were set to "Expand Grouping." 98597
- Issues editing % *Adj* fields. 101543
- Errors occurred with the order of costs when creating a new other cost. 101797
- In some cases, the sell price did not update until Bid Summary was closed and opened. 102559
- The Top Sheet displayed incorrect values for multiple summaries with different tax rates combined. 103348
- Issue with the order of sections in "Total By Grouping." 103357
- The Totals By Grouping Bid Summary Report did not show the summary name on the first page. 104063
- Values were displayed incorrectly in *Top Sheet with Expand Grouping* in Print Preview. 105921
- The position of the bid summary name was incorrect in the *Job Heading* section in Print Preview. 105929
- The labelsets order was incorrect in the *Job Heading* section when the "Totals by Grouping" option was selected. 105932
- The Bid Summary Report did not show adjustments to labor factor. 106832
- Issue with displaying values when grouping Bid Summary in Print Preview. 106878

- Sections were displayed incorrectly when exporting an Excel file from Print Preview if the “Totals by Grouping” layout was selected. 106891
- Issue with Bid Summary Report Material Total. 107273
- Fixed Rounding now going out enough decimal places. 108371
- Changing between locked and unlocked summary did not use the new lock state. 109643
- The breakout order was incorrect in the *Job Heading* section when the “Expand Grouping” option was selected. 110741
- The adjusted % values of Material/Labor were not saved in the *Job Heading* section when the “Expand Grouping” option was selected. 110742
- Could not use the <Enter> key to validate final entry in the “Ext Adj” tab. 111603
- Values entered in the *Unit* field may have been cleared when sending extension to bid summary if *Breakout in Bid Summary* was checked. 111914

## CHANGE ORDER

---

### Software Maintenance

- The date format in Change Order screen was inconsistent. 63225
- The current date could not be selected on the Change Order screen. 63226
- Issues with the *Error Date* fields in Change Order window. 63448
- New blank change orders did not display in Change Orders windows. 74573
- An error occurred when entering an *Alert Date*. 75630
- Reports were not shown according to the selected template. 75993
- Edits made to unit of measure in Extension were not displayed in Change Order Report. 106987
- The preview screen did not refresh when selecting a custom report template. 87779

## DEP

---

### Software Maintenance

- Takeoff did not appear on the DEP sheet for all users. 25696
- Issues with placing the Length Takeoff down over Count Takeoff. 37702
- Users could see other users’ takeoff when changing to sheet. 39043
- Takeoff appeared in the incorrect labelset on the legend. 54255
- Issues adding drops to the start and end of a line with a second user. 68524
- Bezier lines did not show drop details. 83611
- The “Highlight Selection” option did not update color changes until DEP was closed or opened. 86326
- Autoscroll scrolled the DEP sheet when the “Select” tool or “Count” takeoff was selected. 92472
- Disabled the “Keep DEP as Top Most Window” setting by default. 93504

- “Reminder Message” could not be edited. 96793
- Issues with audit trail values when “Round to Next” was enabled. 98922
- The legend showed Takeoff in incorrect labelset when grouped by labelset. 107661

## EXTENSION

---

### Software Maintenance

- Renaming cost codes caused Takeoff to not show in unlinked extensions. 63387
- Was difficult to determine which extension was selected. 86863
- Editing a value back to the original value did not remove bold text. 91466
- Labels appeared in reverse order when combined in Extension. 91657
- Maintained the selected Extension Report when changing to a different summary and back. 96816
- The value in *Range Edit* did not refresh when opened in another job. 97847
- The multiplier would not be copied when the extension was copied. 98051
- The *New* section in the “Material” tab was blank. 104533
- Issue with Extension Material filters. 106558
- The grid refreshed when using manual cherry pick. 106560
- Print Preview could not be changed to portrait from landscape. 107653
- Auto cherry pick did not function in certain circumstances. 108652
- Unlinked extensions were blank when takeoff and labels in unlinked extensions were deleted. 111367
- Cherry pick prices could be cleared in unlinked extensions. 112082
- The auto cherry pick popup read “Nothing was updated” even when prices were updated. 112105
- Did not allow all labels to be unchecked. 90372

## FOUNDATION INTEGRATION

---

### Software Maintenance

- The Current Filter did not omit values. 94231
- Changed Default Source Values. 94235
- Issue with Export Job Name. 94236
- The summary name was used for the job name when doing budget export. 107378
- The *Tax*, *Overhead*, and *Profit* checkboxes did not calculate in the export. 107382

## Software Maintenance

- The Excel parts import failed resulting in a “Key not found” error. 23836
- An error occurred in the Job Screen Print when a job report was edited. 71700
- Text could not be pasted when renaming existing labels. 82422
- An error occurred when <Click to Add> was selected in Labels. 90912
- An error occurred when the *Update Text Overlay* checkbox was selected in Takeoff. 98482
- Email links used an incorrect email when clicked. 106555
- Upgraded to latest version of CodeMeter. 111159