Getting Started Guide
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Introducing B2W Estimate

B2W Estimate, a Windows-based construction estimating and bidding application built on Microsoft .NET and SQL Server technology, provides you with an unprecedented level of power, performance and flexibility. B2W Estimate enhances estimating and bidding through standardization, improved accuracy and efficiency, and integration with other management solutions, such as project management, scheduling and accounting. B2W Estimate will help you win more profitable bids for your company.

Our software lets you store all your cost data in one central database to ensure everyone is using the same up-to-date data when building estimates. Globally edit your materials, labor, equipment and crews during the actual costing process so you can analyze or manipulate your estimate minute-by-minute. Fax subcontractor and vendor/materials RFQs in seconds and automatically distribute selected bids directly into your estimate. Use the power of Microsoft Excel for unlimited costing flexibility. Even create and apply the most sophisticated or simplest mark-up schemes. Or convert the entire bid from metric to imperial with just a single click. And that’s just for starters.
About This Guide

The B2W Estimate Getting Started Guide is a guided tour of B2W Estimate – one that introduces you to key areas and important concepts within the software. The purpose of this guide is to provide you with a general understanding of how B2W Estimate works, a sense of what it can do for you, and to serve as a solid foundation on which you can build further skills during your formal B2W Estimate training session.

This “guided discovery” is not meant to serve as a comprehensive reference for answering specific questions. The best reference for getting answers to your questions is the B2W Estimate Online Help System. The online help system can be accessed by pressing F1 on your keyboard at any point within the software.

Whether you work for a company who has just purchased B2W Estimate, or are a new estimator at a company that has used B2W Estimate for many years, the Getting Started Guide should be considered a prerequisite for formal B2W Estimate training, and not a replacement.

The Getting Started Guide is divided into six chapters:

**Chapter 1 – Starting B2W Estimate for the First Time** walks you through the process of launching B2W Estimate and connecting to the sample database.

**Chapter 2 – A Brief Tour of B2W Estimate** teaches you about the four main program areas that comprise B2W Estimate.

**Chapter 3 – The Resources Area** guides you through Resources, where costing and organization information is entered.

**Chapter 4 – The Item Databases Area** introduces you to the Item Databases area, where you can store detailed pay items and indirect items for use in your estimates.

**Chapter 5 – The Estimate** steps you through the Estimate area, where pay items, indirect items, and cost components are combined with pricing information to form a bid.

**Chapter 6 – Subcontractor and Vendor Management** introduces you to two modules which allow you to request quotes and analyze sub and vendor prices for large groups of items, tasks, and materials.
Getting Help

The B2W ESTIMATE Getting Started Guide is one of many tools at your disposal as you begin to master the software. B2W Software provides a host of technical support resources to help you get the answers you need, when you need them.

Context-Sensitive Online Help

The fastest way to find answers to specific questions is by referring to B2W Estimate's context-sensitive help system.

The online help system is designed to automatically display a topic which corresponds to exactly what you are doing in B2W Estimate. Once inside the help system, you can navigate to other help topics by using the table of contents, index, or by performing a keyword or text search.

Access the help system by clicking Help on the toolbar or by simply pressing F1 on your keyboard.

Frequently Asked Questions

Have you ever wondered how to do a certain task in B2W Estimate? Chances are other users have as well! Check the Frequently Asked Questions page on B2W Software’s premium support Website for the latest answers to your questions.

The frequently asked questions page is located at:
http://support.b2wsoftware.com/faq

Technical Support

B2W Software is home to the finest technical support call center in the industry. The B2W technical support staff is at your service providing quick, professional resolutions to your technical support issues, answers to your questions, and responses to your feedback and suggestions.

For your convenience we are available at (888) 390-8822 or support@b2wsoftware.com.
Chapter 1

Starting B2W Estimate for the First Time

The Getting Started Guide uses a sample database pre-populated with resources, item databases, and estimates to guide you through the various areas of the program.

When your administrator first installed B2W Estimate, the Setup program placed two unique B2W Estimate databases on your database server:

- **B2WSample** is a database that is pre-populated with sample resources, items, and estimates from various construction disciplines.
- **B2WData** is initially a blank database, inside of which you will begin building your own company’s resource and estimate data. You’ll complete this step in the process once you complete your B2W Estimate training session.

This chapter walks you through the process of starting B2W Estimate for the first time, and connecting to the sample database.
Launching B2W Estimate

On your Windows desktop, there is a B2W Estimate icon. To launch B2W Estimate, simply double click this icon.

Launch B2W Estimate

1. On your Windows desktop, locate the Estimate icon, as shown below:

![Estimate Icon]

2. Double click the Estimate icon.

Note: You can also use the B2W Estimate shortcut in your B2W Software Program group to launch the program. Click Start, point to All Programs, then to the B2W Software program group, then click the Estimate icon.

Logging on to B2W Estimate

Depending on the way your administrator has created your user account or program shortcut, you will either be taken directly into the B2W Estimate program, or you will see the B2W Estimate Logon dialog. The logon process serves two purposes – it lets B2W Estimate know who you are, so it can tag various resources and estimates that you create with your initials, and it also ensures that only authorized employees can access B2W Estimate.

Connecting to the Sample Database

At the Logon dialog, you would normally enter your user name and password, and the click OK to proceed into the program. However, since the remainder of this guide uses the Sample Database to guide you through the software, the steps below will show you how to connect to the sample database.

Note: The Sample Database was copied to your database server when B2W Estimate was first installed. It remains there permanently for reference or for new estimators to use with this guide as they learn how to use B2W Estimate. When you begin to create your live database, be sure that you are not connected to the sample database.
Connect to the B2W Estimate Sample Database

1. If you see the Estimate Logon dialog on your screen after launching B2W Estimate, please skip ahead to step 4.

2. Click the Tools menu, point to Security, and then click Log On as a Different User. Your B2W Estimate windows will close, and the Estimate Logon dialog will be displayed.

3. In the Logon dialog, if you do not see the Database field, click Options to make the Database field appear.

4. In the User name field, type one of the following user names: Bill, Bob, Jane, Jill, or Paul. (These are all names of sample users within the sample database.)

5. Leave the Password field empty.

6. In the Database field, select the database that ends with “B2WSample” from the drop-down list. While the exact database text may vary, the Logon dialog should look something like this:

7. Click OK. The B2W Estimate Home Page appears, and you are now connected to the B2W Estimate Sample Database.
Chapter 2

A Brief Tour of B2W Estimate

There are four main areas that comprise B2W Estimate:

- The B2W Estimate Home Page
- Resources
- Item Databases
- The Estimate area

The B2W Estimate Home Page

The B2W Estimate Home Page appears each time you launch B2W Estimate. It serves as a launching pad to open an estimate, create a new estimate, or go to Resources or Item Databases. For easy access to recently opened estimates, the Home Page also shows you a list of the four estimates you have most recently worked on. In addition, the Home Page has direct links to the B2W Estimate help system and online support center on the Web.

At the bottom of the screen, the Home Page indicates which B2W Estimate database you're connected to. This allows you to quickly determine, for example, whether you are connected to the sample database or your “live” company database. If your company has more than one division, your system administrator can configure a different B2W Estimate database for each division. In this case, the database indication helps you determine that you’re working with information for the correct division.
Home Page Links

Below is a listing of the main links that appear on the B2W Estimate Home Page, along with descriptions of what each one does:

<table>
<thead>
<tr>
<th>Link</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Estimate</td>
<td>Displays the Open Estimate dialog, which allows you to browse your database for the estimate you wish to open. This option is used to open an estimate that has already been created.</td>
</tr>
<tr>
<td>New Estimate</td>
<td>Launches the New Estimate Wizard, which guides you through the process of creating a new estimate.</td>
</tr>
</tbody>
</table>
**Chapter 2 – A Brief Tour of B2W Estimate**

<table>
<thead>
<tr>
<th>Link</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work on Resources</td>
<td>Brings you to the Resources area of the program, which contains &quot;costing&quot; resources such as Labor, Equipment, and Materials, as well as organization resources such as Customers and Vendors.</td>
</tr>
<tr>
<td>Work on Item Databases</td>
<td>Brings you to the Item Databases area of the program. This area of the program contains item templates that are used to form the foundation of your estimates, and includes both pay items and indirect items.</td>
</tr>
<tr>
<td>What's New</td>
<td>Read about the latest and greatest features in B2W Estimate.</td>
</tr>
<tr>
<td>Online Help</td>
<td>Opens the B2W Estimate online help system to the Home Page topic. You can also access the help system by clicking Help on the toolbar or by pressing F1 on your keyboard.</td>
</tr>
<tr>
<td>Technical Support Website</td>
<td>Opens your web browser and brings you directly to our Support Website at <a href="http://support.b2wsoftware.com">http://support.b2wsoftware.com</a></td>
</tr>
<tr>
<td>Visit the B2W Web Site</td>
<td>Opens your web browser and brings you directly to the B2W Software Website at <a href="http://www.b2wsoftware.com">http://www.b2wsoftware.com</a></td>
</tr>
</tbody>
</table>

**Navigation Toolbar**

In addition to the links described above, you will also notice a **Navigation toolbar** near the top of your B2W Estimate window. The buttons on this toolbar help you move from one program area to another:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="arrow_left.png" alt="Go Back" /></td>
<td>The <strong>Go Back</strong> button brings you back to the most recently visited location in B2W Estimate.</td>
</tr>
<tr>
<td><img src="home.png" alt="Home" /></td>
<td>The <strong>Home</strong> button brings you to the B2W Estimate Home page.</td>
</tr>
</tbody>
</table>
The **Estimate** button navigates you to the estimate you are working on. If you have not opened an estimate since starting B2W Estimate, this button displays the Open Estimate dialog to allow you to select an estimate to open.

The **Resources** button brings you to the Resources area of the program.

The **Item Databases** button brings you to the Item Databases area of the program.

If you are ever unsure which program area you are in, just look at the Navigation toolbar. The button that corresponds to the area of the program that you are in will appear “pressed in.”
Resources

The Resources area of the program contains all of your centralized costing information. This area of the program contains costing resources such as labor, equipment, and materials that you use to build the cost structure of your estimates. It also contains organization information for subcontractors, vendors, customers etc. Finally, it contains some powerful templates that allow you to create default costing structures and reuse them from estimate to estimate. These include Crew Templates, Task Templates, and Excel Workbooks. The information in this area of the program is shared among all estimators using the database to which you’re connected.

To view the Resources program area, go ahead and click Resources on the Navigation toolbar. We’ll be talking about the various resources you see listed on the left hand side of the screen in the next chapter.

The Resources area:
Item Databases

The Item Databases program area is a storage area for two types of item templates. Pay item templates can be used to form the basis of an estimate. Indirect, or incidental, item templates can be used to detail the indirect cost in your estimates. One of the most powerful features of Item Databases is the ability to build cost structures directly in the item templates, so when you add the item template to the estimate, the entire costing structure comes in with it.

To view the Item Databases program area, click Item Databases on the Navigation toolbar. We'll be talking about the differences between pay item templates, DOT item templates, and indirect item templates in Chapter 5.

The Item Databases area:
The Estimate Area

The Estimate area in B2W Estimate is where you will spend the majority of your time while using the product. This is where estimates are built, largely through the addition of pay item templates and indirect item templates which are stored in the Item Databases area.

In addition to the Estimating view, this area of the program also includes Subcontractor Management and Vendor Management views to allow you to manage the RFQ solicitation process.

**Open an Estimate**

1. Click *Estimate* on the Navigation toolbar.
2. When the Open Estimate dialog appears, double click the sample estimate titled *NH DOT Improvements of Rt 93, Concord*.
3. Take a moment to click from one estimating tab to another. We'll be discussing each of these tabs in Chapter 6.
The Estimate area:

![Image of the Estimate area](image)

**How B2W Estimate Areas Relate to Each Other**

As you have recently learned, Resources and Item Databases store the information that you use to create estimates. In a multi-estimator environment, these areas are centralized and shared by all estimators. This is a very important concept, as it allows you to create item templates and costing resources in one place and share them with all of the estimators on your network. This approach eliminates duplicate data entry and promotes standardization.

As you create an estimate, information from Resources and Item Databases is copied into the estimate as needed. The items and resources added to a particular estimate are unique to that estimate, and can be modified without changing the information in Resources and Item Databases. This independence gives estimators the freedom to “tweak” cost structures as needed inside their estimates, without affecting the centralized data stored in Resources and Item Databases.
How B2W Estimate program areas interact:

Navigate to the program areas

Resource components may be added to item templates

Resource components may be added to the estimate

Pay items and indirect items may be added to the estimate

Estimate

Estimating View  Subcontractor Management View  Vendor Management View
Chapter 3

The Resources Area

Now that you're acquainted with the four main program areas, we can begin to explore each of these four areas in greater detail. Since the Resources area contains the “building blocks” for everything you do in Item Database and Estimates, we'll begin there.

To access the Resources area, click Resources on the Navigation toolbar.

Notice that the screen is divided into two unequal halves. On the left-hand side of the screen you will see a list of all the various types of resources. When you click a resource type on the left, a list of those resources appears on the right.
Take a moment to click several different resource types on the left, and notice how the information visible on the right changes to reflect the selected resource.

Notice that there are two distinct groupings of resources: **Costing Resources** and **Organizations**. Costing resources, as the name implies, will eventually form the basis of your task template and item template structures—which we’ll discuss later in more detail—and ultimately your estimates. Organizations store information about various organizations with whom you do business.

Notice that on the right-hand side, there are two tabs shown near the top of the screen; a listing tab and a detail tab. The listing tab displays a listing of all of the records within a specific type of resource, including basic information pertaining to those resources. The detail tab provides more detailed information specific to an individual resource, and allows you to build or configure template structures for certain types of resources.

Take a moment to click back and forth from the listing tab to the detail tab for a few different types of resources to get an idea of the types of information displayed on each tab.

**Tip:** You can also navigate from the listing tab to the detail tab by double clicking the row selector to the left of a specific resource’s description.

**Organization Resources**

Since organization resources are less complex than costing resources, we’ll begin by discussing them. As mentioned above, organization resources contain information about organizations which are used in various ways inside your estimates. The four types of organization resources are customers, engineers & architects, subcontractors, and vendors.

**Customers**

Customer resources allow you to create and store your customer and authority information. Each estimate you create will reference one or more customers from this list when you print your final bid form.

Like other resources, the Customers resource is broken up into a listing tab and a detail tab. The Customer Listing tab allows you view your entire list of customers, or a filtered subset of that list. The Customer Detail tab allows you to edit specific information for an individual customer and includes a list of contacts.

**The Customer Listing Tab**

Let’s take a closer look at the Customer Listing tab.
Navigate to the Customer Listing Tab

1. Click Customers in the left-hand pane.
2. If the Customer Listing tab is not already visible, click that tab.
3. A list of sample customers appears on the right.

The Customer Listing tab:

The Customer Listing tab displays basic information pertaining to each record.

Note: Categories are user-defined and are used to organize what can eventually become fairly lengthy resource lists. We’ll be talking more about categories later on.
Sorting

By default, the list of records visible on a listing tab is sorted alphabetically by the left-most column—in this case, Company Name. You can specify a different sort order that will stay in effect until you navigate to a different program area.

Sort the Customer List

Take a moment to practice sorting the sample customer list, by following these steps:

1. Click in any column—City, for example.
2. Click Sort Ascending or Sort Descending on the toolbar.
3. The list of records is now sorted by the column you selected in step 1.

Tip: If you hover your mouse pointer over any button on the toolbar, a tool tip will appear. This tool tip tells you what the button does, and includes any keyboard shortcut, if applicable.

Filtering

Filtering is a very important concept that you will use in nearly all program areas. As we saw above, the sorting process continues to display the entire contents of a particular list, arranged in a certain way. Filtering a list, however, “thins out” the list by displaying only those records that match a certain criteria of your choosing.

Here’s one way in which the categories we mentioned earlier come into play. Notice how Agnerson Construction, Americorp Construction, and General Contracting, Inc. are all assigned to a category called Private. When we filter the customer list by the Private category, only private customers will appear—customers belonging to other categories are filtered out.
Tip: Filtering various lists throughout the program will help you to perform many common actions more quickly, such as adding items to an estimate, adding subcontractors to an RFQ group, or adding a crew to a pay item.
Create a New Customer

Now that you are familiar with basic listing tab functions, let’s practice creating a new customer. Remember, this is just practice since we’re using the B2W Estimate Sample Database. Your “real” customer list will be built after you are finished with the Getting Started Guide, and have reconnected to your company’s B2W Estimate database.

1. Verify that you are still on the Customer Listing tab.

2. Click New Record on the toolbar. B2W Estimate places the blinking cursor in the blank row at the end of the list.

3. Enter a customer name, and then press TAB on your keyboard. Notice that the cursor moves one field to the right, in this case to the City field. Also notice that B2W Estimate automatically capitalizes the company name you entered.

4. Enter a City, then press TAB and enter a State. Note that the combination of name and city must be unique for each customer. If you wish, you may also enter a phone and fax number.

Notice that since our customer list is still filtered to show Private customer, B2W Estimate assumes that this customer also has the Private category associated with it. You may override the category if you wish.

The Customer Detail Tab

Now that you’re familiar with the Customer Listing tab and the process of creating a new customer, let’s take a closer look at the Customer Detail tab, where more detailed information pertaining to your customer is stored.

Navigate to the Customer Detail Tab

1. Position your cursor anywhere on the row for the new customer you created in the previous exercise.

2. Click the Customer Detail tab.

3. The detail tab for your new customer appears.
Take a moment to review the many fields on the Customer Detail tab. Each field that has a white background is one in which you can enter or manipulate data. This is referred to as a “read-write” field. Fields that have a gray background are referred to as “read-only.” You can not modify the information in read-only fields.

### Enter Details for your New Customer
You may now enter the detailed information for your new customer. These details, such as address, city, and state, are important, as they will be printed at the top of your bid forms later on.

1. Verify that you are on the Customer Detail tab for your new customer.
2. Enter the details for your new customer into the appropriate fields.

### Hyperlinks
On the Customer Detail tab, enter a valid web address in the Web Address field, and press TAB on your keyboard. Notice that the information in this field looks different than the information in other fields. Web addresses in B2W Estimate are hyperlinks.

If you press and hold CTRL on your keyboard, and then click the hyperlink in the Web Address field, your internet browser opens to the website referenced by the hyperlink.

### Contacts
Contacts are the individuals associated with organization resources. Contacts are configured on the detail tabs of customers, engineers & architects, subcontractors, and vendors.

### Create a New Contact
Now you can practice creating contacts for your customer. Entering contact information, including e-mail addresses, is important if you choose to e-mail bid forms to customers later on.

1. In the Contacts area, click into the Name column to the right of the new contact icon.
2. Type the contact’s name.
3. Enter additional contact information.
Note: It is important to enter a valid e-mail address for each contact. These e-mail addresses appear as hyperlinks, just like the web addresses we looked at earlier, and are used for e-mailing bid forms and RFQs to customers, subcontractors, and vendors.

More Navigation Toolbar Buttons
There is no need to go back to the listing tab to view the details for another customer within the customer database, nor do you need to return to the listing tab to create a new customer or to delete an existing customer.

The navigation buttons described below are available on the toolbar. These buttons have the same behavior whether you are on a listing tab or a detail tab.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🔄</td>
<td>Takes you to the first record.</td>
</tr>
<tr>
<td>⬅️</td>
<td>Takes you to the previous record.</td>
</tr>
<tr>
<td>⏩</td>
<td>Takes you the next record.</td>
</tr>
<tr>
<td>⏪</td>
<td>Takes you to the last record.</td>
</tr>
<tr>
<td>🔄</td>
<td>Takes you to a new record.</td>
</tr>
<tr>
<td>🗑️</td>
<td>Deletes the selected record.</td>
</tr>
</tbody>
</table>

Take a few moments to experiment by clicking these buttons on the toolbar. Notice that since we had filtered the Customer Listing tab to show only customers within the Private category, B2W Estimate moves through only those customers when moving backwards and forward through the list.

Engineers & Architects
Now that you have learned how to work within the Customers resource, the remaining organization resources will be very simple to master.

Engineers and Architect resources allow you to create and store your engineer and architect information. Each bid you create can reference one engineer/architect from resources.
Navigate to the **Engineers & Architects** resource now by clicking Engineers/Architects on the left-hand side of the screen.

**The Engineers & Architects resource:**

![Image of Engineers & Architects resource]

All the functionality discussed in the Customers section also applies to the Engineers & Architects resource.

**Create a New Engineer/Architect**

Take a few moments to practice what you’ve learned to this point by creating a new Engineer/Architect, and filling in some details. This time, let’s create the new record right on the detail tab.

1. Navigate to the **Engineer/Architect Detail** tab.
2. Click **New Record** on the toolbar.
3. Enter a name and city, and any other information you wish to enter.
4. Create a new contact for your new engineer/architect.
Subcontractors

Subcontractors are organizations who perform services for you within the context of an estimate. The Subcontractor resource also follows the same rules as discussed in the above sections. However, since subs perform such a vital role, we’ll now discuss two new areas of particular interest: work types and minority types.

The Subcontractors resource:

The Subcontractor Listing Tab

Navigate to the Subcontractor Listing tab. Notice that in addition to the Show category filter at the top of the screen, there is now a second filtering combo box: Show subcontractors with work type.

Take a moment to make some selections in the Show subcontractors with work type combo box, for example, “Guard Rail” or “Pavement Markings.” You will see that the subcontractor list changes as you select various work types to reflect the subcontractors who are able to perform the type of work indicated by the work type you selected.
The Subcontractor Detail Tab

How does B2W Estimate know what type of work each subcontractor can do? What if a subcontractor can perform more than one type of service? To answer those questions, let’s move to the Subcontractor Detail tab for any subcontractor.

The Subcontractor Detail tab has two new areas we’ve not yet seen: the **Work types** area and the **Minority types** area.

**Work Types**

Use the **Select Work Types...** button to add and remove work types – and work subtypes – to and from this list.

**Minority Types**

Use the **Add...** and **Remove** buttons to add and remove minority types to add or remove minority types to or from this list.

For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Creating your own custom list of work types
- Creating your own custom list of minority types
Vendors

Vendors share many similarities with the Subcontractors resource. Vendors are your material suppliers. Ultimately, these vendors will be assigned to individual materials in your estimate, or to groups of materials through the RFQ process.

The Vendors resource:

The Vendor Listing Tab

Navigate to the Vendor Listing tab. Notice that in addition to the Show category filter at the top of the screen, there is now a second filtering combo box: Show vendors with material category.

Take a moment to make some selections in the Show vendors with material category combo box, for example “Asphalt” or “Pipe.” You will see that the vendor list changes as you select various material categories, to reflect the vendors who are able to provide the category of material you selected. This relationship between vendors and material categories is very similar to that between subcontractors and work types.
The Vendor Detail Tab

How does B2W Estimate know what kind of materials each vendor provides? What if a vendor can provide many different types of materials? To answer these questions, let’s move to the Vendor Detail tab for any vendor.

The Vendor Detail tab has three unique areas that we’ll be discussing: the **Owned** checkbox, the **Material categories** area, and the **Materials this vendor sells** area.

**Owned vendors**

Just above the zip code field is a checkbox that allows you to indicate whether a vendor is owned or not. An example of an owned vendor is an asphalt plant or gravel pit that is owned by your company.

In an estimate, when you assign materials to an owned vendor, those material costs will account to the "Materials Owned" category. Materials purchased from an external vendor will account to the "Materials Purchased" cost category. Each of these two material categories are individually summarized within a bid, and each category can generate a unique overhead and profit value based on separate percentages.

**Material Categories**

Use the **Select Material Categories...** button to add and remove material categories – and material subcategories – to and from this list.

**Minority Types**

Use the **Add...** and **Remove** buttons to add and remove minority types to add or remove minority types to or from this list.

**Materials this vendor sells**

B2W Estimate allows you to specify a list of materials and prices for each vendor. Vendors can store a unique unit price for an unlimited number of materials. Likewise, each material can be linked to an unlimited number of vendors.

If you specify vendor pricing for a material here in Resources, then B2W Estimate will automatically use that price as a default if you choose that vendor as your supplier for that material in an estimate.
Associate Materials with a Vendor

Take a few moments to link specific material pricing to your vendor. We’ll be talking much more about materials later on.

1. Verify that you are still on the Vendor Detail tab for the vendor you created in the previous exercise.
2. In the Materials this vendor sells area, click Add.
3. Place checkmarks next to several materials. You could, at this point, click New to create a new material.
4. Click OK. You will now see the selected materials listed on the Vendor Detail tab.
5. Enter some prices for the materials you have entered.

For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Creating your own custom list of material categories
- Establishing unique markup schemes for materials that come from “owned” vendors
Costing Resources

Now that you are familiar with basic Resources functionality, we can look at some more intricate and important types of resources: costing resources.

Costing resources are resources that contain costing information that will be used inside the items in your estimates. These costing resources are described below.

Labor

Labor resources allow you to create and store the labor types that will be used in your estimates. Labor types can be used in crew templates, task templates, or item templates; or they can be added directly to pay items or indirect items in an estimate.

In this section, you will be introduced to labor rate classes, labor burdens, and labor types.

Navigate to the Labor resource now by clicking Labor on the left-hand side of the screen.
The Labor resource:

On the Labor Listing tab, take a moment to review the list of labor types within the sample database. Notice that each labor type has a unique base cost and burden value, as well as values for regular cost, overtime cost, and double time cost.

Labor Rate Classes

Labor base costs and burdens can vary from job to job, depending on the state or province where the work is to be performed. Perhaps various regions in which you bid work are subject to union variables, or perhaps you occasionally bid work using Davis Bacon rates.

Labor rate classes, which act as containers for your labor types, allow you to account for these variables ahead of time. In Resources, you can create any number of labor rate classes. Inside each rate class, you can configure each labor type with unique base costs and burdens. When you create an estimate, the New Estimate Wizard will prompt you to select a default labor rate class for that job. Then, when you add labor to that estimate, B2W Estimate uses the rates and burdens stored within the corresponding labor rate class in Resources.
The B2W Estimate Sample Database has two labor rate classes: “Standard” and “Davis Bacon.”

On the Labor Listing tab, take a moment to switch from one rate class to another and then back again, using the Display info for labor rate class combo box in the top right-hand corner of the screen. Notice how the base costs and burden values for each labor type are different within each rate class.

View the Default Settings for a Labor Rate Class
While creating and configuring a labor rate class is beyond the scope of this Getting Started Guide, it is useful to understand where these default settings are stored, as these settings are used for new labor types that you create.

1. On the Labor Listing tab, click Edit Rate Class. This button can be found just to the right of the Display info for labor rate class combo box in the top right-hand corner of the screen.

2. The Options dialog appears, as shown below, and displays the settings for the rate class that was displayed on the Labor Listing tab. The Options dialog is a “behind the scenes” area that contains settings that control how the program operates as well as default system-wide settings that are applied to new records you create.

3. Take a moment to review the various default settings for this rate class, then click Close to return to the Labor Listing tab.
Labor Burdens

Labor burdens are additional costs that are associated with labor, such as FICA or Worker’s Compensation. These burdens can be automatically calculated as a percent of a base cost or as an hourly or daily dollar amount.

We had a first look at labor burdens in the Options dialog when we examined the default settings for a labor rate class. As we mentioned earlier, these burdens are stamped onto each new labor type we create on a per rate class basis. Clearly, not all labor burdens apply in a uniform fashion for all labor types. How do we alter the burden settings for a specific labor type?

To find the answer to this question, navigate to the Labor Detail tab for the labor type you created in the previous exercise.

On the Labor Detail tab, notice the list of labor burdens visible in the Break down labor burden area. These burdens, which currently display the default burdens for the selected rate class, can be modified on an individual labor type basis here on the Labor Detail tab.

Take a moment to modify some of the percentages and values for the labor burdens listed here and notice how the values in the Cost breakdown per HR area update accordingly.

For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Creating and configuring labor rate classes
- Creating and configuring labor burdens
- Burdenable burdens
- How burdens apply to overtime and double time

**Equipment**

The Equipment resource is very similar to the labor resource. Equipment can be added to crew templates, task templates, or item templates; or added directly to pay items or indirect items in an estimate. Equipment, like labor, can also be assigned to a crew template.

In this section, you will be introduced to equipment rate classes, equipment types, equipment burdens, and fuel consumption.

Navigate to the **Equipment Resource** now by clicking Equipment on the left-hand side of the screen.

**The Equipment resource:**

On the **Equipment Listing** tab, take a moment to review the list of equipment types within the sample database. Notice that each equipment type has a unique base cost and burden value, similar to what we saw in the labor resource.
Equipment Rate Classes

Equipment costs can vary depending on the region in which you are bidding work. Fuel costs may vary, or perhaps certain equipment may need to be rented if you are performing work far from your equipment yard. These variables can be accounted for ahead of time by using equipment rate classes.

The B2W Estimate Sample Database has two equipment rate classes: “Standard” and “Region 2 Office.” Take a moment to switch from one rate class to another and then back again, using the Display info for equipment rate class combo box in the top right-hand corner of the screen. Notice how the base costs and burden values for each equipment type are different within each rate class.
View the Default Settings for an Equipment Rate Class

While creating and configuring an equipment rate class is beyond the scope of this Getting Started Guide, it is useful to understand where these default settings are stored, as these settings are “stamped” onto new equipment types that you create.

1. On the Equipment Listing tab, click **Edit Rate Class**. This button can be found just to the right of the **Display info for equipment rate class** combo box in the top right-hand corner of the screen.

2. The Options dialog appears, as shown below, and displays the settings for the rate class that was displayed on the Equipment Listing tab.

3. Take a moment to review the various default settings for this rate class, and then click **Close** to return to the Equipment Listing tab.
Equipment Burdens

Equipment burdens are additional costs that are associated with equipment, such as maintenance, or fuel costs. These burdens can be automatically calculated as a percent of a base cost, or as an hourly, daily, weekly, or monthly dollar amount.

We had a first look at equipment burdens in the Options dialog, when we examined the default settings for an equipment rate class. As we mentioned earlier, these burdens are stamped onto each new equipment record we create on a per rate class basis. Clearly, not all equipment burdens apply in a uniform fashion for all equipment. How do we alter the burden settings for a specific equipment record?

To find the answer to this question, navigate to the Equipment Detail tab for the equipment record you created in the previous exercise.

On the Equipment Detail tab, notice the list of equipment burdens visible in the Break down equipment burden area. The burdens listed here initially reflect the defaults for the equipment rate class, but can be modified for an individual equipment record here on the Equipment Detail tab.

Take a moment to modify some of the percentages and values for the equipment burdens listed here, and notice how the values in the Cost breakdown per DY area update accordingly.

Fuel Consumption

In the Break down equipment burden area, there is information related to this equipment record's fuel consumption. The list of fuel types, as well as the costs for those fuel types, is stored in a “behind the scenes” area called the Options dialog.
Take a moment to alter the **Fuel consumption** for your equipment record. Notice that as you alter the fuel consumption, the values in the **Cost breakdown per {UM}** area are updated to reflect your changes.

**Associated Labor Types**

B2W Estimate allows you to associate a labor type with any equipment record. While this is completely optional, it does speed up the process of building crew templates and other structures later on—you no longer have to remember to add the operator!

When you add an equipment record that has an associated labor type to a crew template, task template, item template, or to an estimate, the associated labor type will be automatically added as well.

Take a moment to change the selection in the **Asst. labor type** combo box, and notice that the values in the **Associated labor cost** and **Unit cost with labor** fields are updated automatically.

**Rented Equipment**

Notice the **Rentl** checkbox. Placing a checkmark here tells B2W Estimate to account the cost for this record into the “Equipment Rented” cost category. Rented equipment will be summarized separately in an estimate, and can be assigned a unique markup percent.

**For Further Study**

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Creating and configuring equipment rate classes
- Creating and configuring equipment burdens
- Creating fuel types, storing fuel costs, and assigning fuel consumptions

**Crew Templates**

Crew templates allow you to create and configure unique combinations of labor and equipment to perform specific types of work. A crew template can have many different configurations, from a single labor type or equipment type, to dozens of equipment types and labor types.

In this section, you will be introduced to crew templates, work rules, the Add Components dialog, and production rates.
Navigate to the **Crew Templates Resource** now by clicking Crew Templates on the left-hand side of the screen.

**The Crew Templates resource:**

On the **Crew Template Listing** tab, take a moment to review the list of crew templates within the sample database. Notice that crew templates can be associated with work types, allowing the same filtering capabilities you saw within the Subcontractors resource. Associating work types with crew templates helps you find the right crew quickly when adding crews to task templates, item templates, or to an estimate.

Also notice that each crew template can be associated with a work rule. We’ll be talking about work rules shortly.
Now that you have created your first crew template, our next step is to configure its hours per day settings, add equipment and labor components, and set a default production rate.

After you are finished with this guide and begin developing your own crew templates, keep in mind the fact that these templates can be tweaked and modified once an estimator has copied them into an estimate. The resources version of the crew template is just that, a template.

Please navigate to the **Crew Template Detail** tab for your new crew now.

**Work Rules**

There are two ways to configure crew-level production hours, equipment hours, and labor hours per day. You can either enter values into these fields on the Crew Template Detail tab, or you can select a work rule.

Work rules are stored crew configuration schemes which contain settings for costing hours, production hours, and labor overtime and double time breakdowns.

When configuring a work rule’s labor hours settings, you can specify an exact number of regular, overtime, and double time hours for each day of the work week. Work rules add great flexibility to your estimate, by allowing you to accurately replicate an actual work week that serves as the cost basis for your crews.

B2W Estimate allows you to create and configure an unlimited number of work rules to meet your company’s specific needs.
Adding Labor and Equipment Components to a Crew Template

There are many occasions in B2W Estimate where various resources can be added to another larger structure. This is a very important process, and one that you will see again when we discuss task templates, item templates, and the Estimate Detail tab.
As we mentioned earlier, labor types and equipment types are the two types of resources that can be added to a crew template.
Add Labor Types and Equipment Types to a Crew Template

1. On the Crew Template Detail tab, click Add Components on the toolbar. You may also click Add in the Equipment area.

2. The Add Components dialog appears, as shown below. You’ll be seeing quite a bit more of this dialog as we continue this tour.

3. Click the Equipment icon near the top of the Add Components dialog.

4. Choose the equipment types you wish to add to your crew template by placing checkmarks next to their descriptions.

5. Click Add.

6. Click the Labor icon near the top of the Add Components dialog.

7. Choose the labor types you wish to add to your crew template by placing checkmarks next to their descriptions. Be careful not to "double up" on labor, as the equipment you just added to your crew may have had associated labor types, which caused the system to add them automatically to the crew template.

8. Click Add, and then click Close.
Note: When adding resources to a crew template, it is recommended to first add equipment, then labor. This is because some of your equipment may already have the appropriate labor types already associated with it.

Production Rates

Each crew template can be assigned one or more default production rates. One of these production rates will be used when you add your crew template to a detailed structure in an estimate which has a corresponding unit of measure.

For example, if a crew template has a default production rate of 1,000 tons per day, and you add it to a detailed pay item in an estimate that has a quantity of 2,000 tons, B2W Estimate will assume the crew can perform this work in 2 days. You can always choose to alter crew production rates in an estimate, even when you set a default rate here in Resources.

You can view and configure production rate information for your crew template by clicking the Production Rates radio button in the top right-hand corner of the Crew Template Detail tab.

Cost Summary

You can view a cost summary for your crew template by clicking the Cost Summary radio button in the top right-hand corner of the Crew Template Detail tab.

For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Configuring default crew template settings
- Creating and configuring work rules
- Configuring hours per day for crew equipment and labor components
- Assigning work rules to crew equipment or labor
- Duplicating crew templates
- Reordering crew equipment and labor in the crew tree view
Materials

Material resources allow you to create and store the materials that will be used in your estimates. Like other resources, materials can be added to task templates or item templates, or added directly to pay items or indirect items in an estimate.

Navigate to the Material Listing tab. Notice how most materials on the list are associated with both a category and subcategory.

The Materials resource:

Take a moment to create a new material and then navigate to the Material Detail tab.

Waste Percents

On the Material Detail tab you will see a field labeled Waste percent. Enter a percentage value in this field if you wish to have B2W Estimate automatically adjust the actual quantity of this material in an estimate by the percent that you expect to be wasted.
For example, if you enter a waste percent of 10%, and add this material to a pay item where 100 units are required, your total quantity with waste will be 110 units.

**Vendor Prices**

At the bottom of the Material Detail tab is the **Material vendors** area. Take a moment to add some vendors. These are the vendors who are known to provide this specific material.

Optionally, you can store a unit price for this material from each one of these vendors. If you do so, B2W Estimate will use this price when you assign this material to that vendor in an estimate. This is useful for vendors with whom you have a standard pricing agreement.

For materials that are quoted on a per-estimate basis, you would not typically enter vendor prices in Resources.

**Preferred Vendors**

Sometimes, a material will always, or usually, be supplied by a particular vendor. Placing a checkmark in the **Preferred** checkbox tells B2W Estimate that this material has a default supplier.

When a material with a preferred vendor is added to an estimate, it comes in already linked to that vendor, and uses that vendor's price as its unit cost.
**Miscellaneous**

As the name implies, the Miscellaneous resource allows you to create and store resources that do not fit into one of the more common resource types, such as labor, equipment, or materials. Some examples of miscellaneous resources are Police, Dump Fees, and Inspection Fees. Like other costing resources, miscellaneous resources can be built into task or item templates, or added directly to pay items or indirect items in an estimate.

**The Miscellaneous resource:**

Miscellaneous resources are very simple structures. Navigate to the **Miscellaneous Listing** tab, then to the **Miscellaneous Detail** tab for any of the samples. Take a moment to scroll through the sample miscellaneous resources by using the navigation toolbar buttons. Other than choosing a unit of measure and entering a base cost, there is little other configuration necessary for a miscellaneous resource.
**Excel Workbooks**

The Excel Workbooks resource is somewhat unique. While workbooks are not a costing resource in the literal sense, they work closely with other costing resources to add limitless flexibility to the calculation power of B2W Estimate.

Using custom formulas inside an Excel workbook, you can calculate quantities, factors, production rates, and even unit costs, and then link those fields dynamically to corresponding fields in B2W Estimate. This means that when you make changes to the Excel workbook in B2W Estimate, any fields which are linked to that workbook will automatically update to reflect the new values!

**The Excel Workbooks resource:**

![Excel Workbooks](image)

Take a moment to examine the detail tabs for the two Excel workbooks that are included in the sample database.

In the **Preview** area at the bottom of the Workbook Detail tab, you will notice that certain cells have a red wedge in the corner. These wedges indicate the presence of a comment in Microsoft Excel. B2W Estimate uses these comments to locate the information you have linked to key areas within a template, or within an estimate.
For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

Creating Excel workbooks from scratch

- Importing existing Excel workbooks into B2W Estimate
- Placing comments on cells within an Excel workbook
- Configuring workbook behavior settings
- Linking workbook values and factors to key areas in B2W Estimate task templates, item templates, and estimates

Task Templates

Task templates are reusable cost structures that can be linked to item templates in the Item Databases area, or copied into an estimate. A task template can be as simple or as complex as you need; it can store nothing more than a plugged unit cost, or it can contain labor, equipment, crew templates, trucking, materials, and even other task templates!

Task templates are created and stored in Resources, making them available to every estimator on your network. This allows you to standardize your estimating process by using standard templates for the work you perform. It also takes the repetition out of costing your bid items, as these reusable templates allow you to create the cost structure once in Resources, and use it repeatedly in multiple estimates.

By linking or adding task templates to pay items and indirect items in the Item Databases area of B2W Estimate, you can automate the creation of the cost structure of each item as it’s added to the estimate. Once you’ve taken some time to set up your task templates and link or include them in your items, you can automatically create the entire structure of an estimate in minutes.

Like other resource databases, the Task Templates database is broken up into a listing tab and a detail tab. The Task Template Listing tab allows you to view your entire list of task templates, or a filtered subset of that list. The Task Template Detail tab allows you to edit specific information for an individual task template, and build detailed cost structures.

In this section, you will be introduced to task templates, cost methods, and the Set Selected Value dialog.

Navigate to the Task Templates Resource now.
The Task Templates resource:

On the **Task Template Listing** tab, take a moment to review the list of task templates within the sample database. Notice that task templates can be associated work types, allowing you the same filtering capabilities that we saw within the Subcontractors resource and the Crew Templates resource. Associating work types with task templates helps you find the right task template quickly, when adding them to item templates, or to an estimate.

Notice too that each task template is associated with one of four possible cost methods. Navigate to the **Task Template Detail** tab, and use navigation toolbar buttons to scroll through the various sample task templates. Notice that the detail tab looks very different for tasks belonging to each of the four cost methods.
The four cost methods are described below:

<table>
<thead>
<tr>
<th>Cost Method</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Plug</strong></td>
<td>The Plug cost method allows you to do just that—plug a unit cost. In the estimate, the total costs for all items and tasks with a cost method of Plug are summarized in a cost category called &quot;Plug.&quot;</td>
</tr>
<tr>
<td><strong>Subcontracted</strong></td>
<td>Subcontracted task templates are used for tasks that you know will be performed by another company. You'll add the specific subcontractors once the task template is added to an estimate. You can optionally enter a default unit cost in the task template, which will be used as a “budget amount” in the estimate.</td>
</tr>
<tr>
<td><strong>Quick</strong></td>
<td>The Quick cost method allows you to break down a task template into cost categories and enter a unit cost for each. For example, you can add the cost categories Labor, Equipment Owned and Equipment Rented, and enter a unit cost for each.</td>
</tr>
<tr>
<td><strong>Detail</strong></td>
<td>The Detail cost method is the most powerful. This method allows you to build a custom cost structure with unlimited detail. For example, you could create a detail task template by adding a crew template, materials, and a trucking component. Most of the task templates you build are likely to use this cost method.</td>
</tr>
</tbody>
</table>
Adding Cost Components to a Detailed Task Template

Earlier in this chapter, we learned how to add labor and equipment components to a crew template. The same general steps apply when adding components to a detailed task template.

Create a New Task Template

1. On the Task Template Detail tab, click New Record on the toolbar.

2. Type a name for your task template in the Task Name field.

3. Select SY for your task template’s unit of measure.

4. You may optionally select or type in a work type, work subtype, and category.

5. Set your task template’s cost method to Plug, then Subcontracted, then Quick, and finally, Detail. Notice how the Task Template Detail tab changes as you select each cost method.
Add Components to a Task Template

1. On the Task Template Detail tab, verify that the cost method for your task template is set to “Detail.”

2. Click Add Components on the toolbar.

3. The Add Components dialog appears, as shown:

4. Select a type of component to add, and then place checkmarks next to the specific components you wish to add.

   For example, you could click the Crews icon near the top of the Add Components dialog, and select some crew templates by placing checkmarks next to their descriptions.

   You could then click the Materials icon and select some materials in the same fashion.

5. Once you have selected the components you wish to add, click Add, and then click Close.
Chapter 3 – The Resources Area

The Trucking Component

Trucking is not stored as its own separate type of resource; it exists only within detailed task templates and item templates. As we'll see later on, trucking components can also be created on-the-fly within an estimate.

To create a new trucking component within your detailed task template, click **New Trucking** on the toolbar. The trucking components will appear in the **Template structure** area underneath your previously added components.

Setting Quantity Relationships

To introduce you to the concept of quantity relationships, please navigate to the Task Template Detail tab for the sample task template called “3” Asphalt Paving.”

In a perfect world, all quantities would be created equal. The quantity of units at the pay item level would carry down throughout the task, the crew, the material, and through any other cost components involved in performing the work involved with that pay item. Obviously, this occurs only rarely.

It is more typical for various units of measure to be found within your task template. In this case, you can have B2W Estimate automatically calculate component quantities through the use of a factor.

**See How Factors are Used to Calculate Component Quantities**

1. Verify that you are on the Task Template Detail tab for sample task template called “3” Asphalt Paving.”

2. Under the **Template structure** area, set the **View** radio button to **Quantities**.

3. Verify that the value in the **Sample qty** field near the top of the screen is set to **10,000**. Notice the quantities for the two components (2” Base Course and 1” Surface Course) within this task template are 1,000 tons and 550 tons, respectively.

4. Now change the sample quantity for the parent task template to another value, and notice how the quantities for the child components adjust accordingly. The reason this happens is because factors have been assigned to the quantities of the child components, so that the appropriate tonnage is calculated based on the square yardage of the parent task template.
For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Creating and configuring plug, subcontracted, and quick task templates
- Creating child tasks within a task template
- Configuring each type of resource within a detailed task template
- Previewing crew templates before adding them to a task template
- Saving child tasks as task templates
- Duplicating a task template
- Configuring task specific crew production
- Assigning factors to child components within a detailed task template
- Linking task template values and factors to embedded Excel workbooks
- Printing reports (Listing or Detail) for any Resource type.

Conclusion

That’s it! You now have a general understanding of the Resources area in B2W Estimate, and are ready to move into the next chapter, where we will discuss the Item Databases area.
Chapter 4

The Item Databases Area

As the name implies, the Item Databases area is where you find item databases. Each item database can contain any number of item templates—reusable pricing structures to which you can add any number of costing resources. An item template can be as simple or as complex as you need. It can store nothing more than a plugged unit cost, or it can contain labor types, equipment types, crew templates, trucking, materials, and even task templates!

The Item Databases area, much like the Resources area, is shared by all estimators connected to the B2W Estimate database you’re connected to. This means that the item templates you create here are available to every estimator. This allows you to standardize your estimating process by using a core set of default templates for the work you perform. It also takes the repetition out of costing your bid items, as these reusable item templates link to structures which are created once in Resources, and can be used repeatedly in multiple estimates.

Once you’ve taken some time to set up the detailed cost structure inside your item templates, you can automatically create the entire structure of an estimate in minutes.

Just as we saw throughout the Resources area, each item database is broken up into a listing tab and a detail tab. The listing tab allows you to view an entire list of item templates, or a filtered subset of that list. The detail tab allows you to edit information specific to an individual item template, and build or link to detailed cost structures.

Use the Navigation Toolbar to go to the Item Databases area now.
The Item Databases area:

On the left-hand side of the screen, notice that there are three types of item databases:

**Custom Databases**

This type of database, indicated by a yellow icon, is created by you, and stores pay items which can be added to any estimate. Since these are the items that you will be submitting to the customer or authority, they form the foundation of the work on which you will be paid.

Although it is not required to create databases of pay items, it streamlines the creation of new estimates, since you can just choose from a list of pay items that you've predefined, rather than having to create them on the fly.
DOT Databases

This type of database, indicated by a gray icon, is provided by B2W Software, and can be installed by using the B2W Estimate Administration tool to access the Add-Ins Manager.

A DOT database is preconfigured with a list of DOT pay items. Similar to the custom pay items above, DOT items can be added to any estimate. You can configure the items in your DOT databases just as you would a custom item. You can also add your own items to a DOT database.

Indirect Database

This database, indicated by a green icon, stores the indirect items which can be used in the process of detailing indirect or incidental costs in an estimate. Indirect items add indirect cost to your estimate, which can then be distributed over any combination of pay items in a variety of ways. This database is a system database and can not be renamed or deleted.
Working with Pay Item Templates

Pay item templates exist within custom and DOT databases. The steps for creating and configuring a pay item template are nearly identical to those for creating and configuring a task template: you create the item template, enter the information you wish to record, such as work type and work subtype, and then finally configure the template on the detail tab.

In the Item Databases area, select the custom Pay Items database in the left-hand pane. Take a moment to review information on the detail tab for some of the item templates within this database.

Just as we saw when working with task templates, the configuration of an item template depends on its cost method. As was the case with task templates, the “detail” cost method is the most powerful, and the one you are likely to use most often.

There are three ways to configure a detail item template:

Get Detail from Related Task Template

The first way you might configure a detail item template is to get the item’s detail structure directly from that of a task template you’ve created in Resources. This option is typically best when the item template and the task template have the same unit of measure.

Add a Task Template to your Detail Item Template

Another way to configure a detail item template is to add a task template to the structure of the item template. This is an attractive option when there is more than one task template which needs to be made part of the item structure, or when the item UM and task UM are not the same.

Add Resources to your Detail Item Template

A third way to configure a detail item template is to simply add crew templates, materials, and other resources directly to the item template, circumventing the task template altogether.

This is a good option for items that have a simple cost structure, or a cost structure that is valid only for a specific pay item. If the cost structure could also be used in other item templates, consider creating that cost structure as a task template. You can then link or add that task template to all the items where it applies.
Working with Indirect Item Templates

In the Item Databases area, select the Indirect Items database on the left-hand side of the screen. Take a moment to review the detail tabs for some of the item templates within this database.

As we mentioned earlier, indirect items add indirect cost to your estimate, which can then be distributed over any combination of pay items in a variety of ways. Indirect item templates are created and stored in the Item Databases area in the same way as pay item templates. There are, however, two additional features that are unique to an indirect item: the ability to set an indirect item as a default for all new estimates, and the ability to have an indirect item calculate its cost based on a percentage you can define.

Default Indirect Items

On the listing tab and detail tab for any indirect item, you will see a Default checkbox. An indirect item with a checkmark in this box will be automatically added to every estimate you create. This means you won't have to manually add it to every estimate.

Calculated Indirect Items

The calculated cost method is only available for indirect items. A calculated indirect item automatically calculates its total cost based on a user-defined percentage of an estimate’s total direct cost, or a percentage of a specific direct cost category within the estimate.

As an added benefit, you can also specify which indirect cost category a calculated indirect item will be categorized as!

To configure a calculated indirect item, simply navigate to the detail tab for an indirect item template that has a cost method of “Calculated,” and enter values in the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Percentage</strong></td>
<td>The percentage used to calculate the item’s cost.</td>
</tr>
<tr>
<td><strong>Percentage of</strong></td>
<td>The value to which the percentage will be applied.</td>
</tr>
<tr>
<td><strong>Categorize as</strong></td>
<td>The indirect cost category which the indirect cost generated by this item will be categorized as.</td>
</tr>
</tbody>
</table>
**For Further Study**

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Creating additional custom item databases
- Creating and configuring plug, subcontracted, calculated and quick item templates
- Creating child tasks within an item template
- Configuring each type of resource within a detailed item template
- Previewing crew templates and task templates before adding them to an item template
- Saving items and child tasks as task templates
- Duplicating an item template
- Configuring item-specific crew production
- Assigning factors to child components within a detailed item template
- Linking item template values and factors to embedded Excel workbooks
- Printing reports (Listing or Detail) for any Item Database.

**Conclusion**

Though we’ve really just scratched the surface, you now have a general sense of both the Resources area and the Item Databases area. You are now ready for a more in depth look at the place where it all comes together: the estimate!
Chapter 5

The Estimate

The Estimate area in B2W Estimate is likely to be where you will spend the vast majority of your time, especially after your Resources and Item Databases have been built to completion!

As we mentioned earlier, the Estimate area is where you build estimates, largely through the addition of pay items and indirect items which are stored in the Item Databases area.

In addition to the eight main estimating tabs that are described below, each estimate also contains the Subcontractor Management and Vendor Management views, which provide a streamlined way to manage your RFQ process. These views are described in Chapter 7.

The eight main estimating tabs are described below:

<table>
<thead>
<tr>
<th>Estimate tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Estimate Information tab</strong></td>
<td>The Estimate Information tab serves as a &quot;cover page&quot; for your estimate. It contains job specific information such as bid date, minority goals, and jobsite location. Much of the information on this tab is displayed in the header of B2W Estimate reports.</td>
</tr>
<tr>
<td><strong>Item Listing tab</strong></td>
<td>The Item Listing tab is a customizable spreadsheet-style view of all of the pay items and indirect items in your estimate. Here, you can add items to the estimate, choose cost methods, and enter item quantities. You can also enter plug costs and assign prices to items. In an extremely simple estimate, you could do everything on this one tab.</td>
</tr>
<tr>
<td><strong>Estimate Detail tab</strong></td>
<td>The Estimate Detail tab is where all the detailed costing for your estimate is performed. It is here that you can add detailed cost structures to your pay items, and configure those structures to meet your estimate's requirements.</td>
</tr>
</tbody>
</table>
### Bid Pricing Strategy tab
The Bid Pricing Strategy tab is where you configure an estimate's bond table, overhead and profit settings, bid level taxes, and indirect cost settings. These settings are used by the program to calculate a target price for your bid. Last minute adds and cuts can also be created and configured on this tab.

### Distribution Strategy tab
The Distribution Strategy tab allows you to select the manner in which your target indirect cost, bond, overhead, and profit amounts are to be distributed, and into which pay items.

### Item Pricing tab
The Item Pricing tab is where you will perform distributions and finalize the prices for your pay items. Last minute adds and cuts can be created and configured on this tab as well.

### Summary tab
The Summary tab is where you will find an on-screen overview of your estimate cost and pricing information, including crew production hours. The information on the Summary tab can be filtered by work type to provide you a work type specific cost and price summary.

### Bid Forms tab
The Bid Forms page is where you send bid forms to the customers for your current estimate. Bid forms can be printed or sent via fax or e-mail. This tab also includes various configuration options to control the appearance of the bid form.

### Creating a New Estimate
The New Estimate Wizard is the interface that walks you through the process of creating new estimates. The wizard guides you through several important decisions that you need to make regarding your new estimate. These decisions tell B2W Estimate how to configure the estimate when it is created.
Create a New Estimate

1. Click New Estimate on the toolbar.


3. On the General Information page, enter a title for your estimate. You cannot enter a title that has been used for another estimate.

4. Select the folder where your estimate will reside.

5. Choose a customer from the list, or type the name of a new customer to create that customer on-the-fly. You may also click Lookup Customer to use more advanced filtering and/or sorting techniques. Once you have located your customer, click Next.

6. On the Quantity Settings page, select the quantity that you want to use for calculating your costs. Bid quantity is the original quantity on the job plans, and takeoff quantity is the actual quantity you think will be needed for each item. If you choose to base your costs on the takeoff quantity, B2W Estimate will give you a comparison of bid versus takeoff on the Item Pricing tab.

7. Select a system of measure for your bid quantities, and then click Next.

8. On the Default Rate Classes page, select the default labor and equipment rate classes for the estimate. All labor and equipment components that are added to the estimate will reflect the settings and values within the default rate class unless otherwise specified at the time you add equipment, crew templates, or task templates. Click Next.

9. On the Material Taxes page, you may override the default material tax percents stored in Resources by placing a checkmark in the box, and entering a new material tax percent. When you enter a Material Tax Override, all materials added to your bid from Resources will use this value as their tax percent by default.

10. Click Next, and then click Finish. Your new estimate is created, stored in the B2W Estimate Sample Database, and you are automatically navigated to the Estimate Information tab for the new estimate.
Opening an Existing Estimate

Each time you click the Open Estimate toolbar button, the Open Estimate dialog appears.

The Open Estimate dialog is an interface which allows you to browse your B2W Estimate database to find and open the estimate you want.

To help you locate the right estimate, the dialog offers a variety of filtering and sorting options. For example, you can use the Status and Estimator filters to search for active estimates that are assigned to you, and then sort the results by date by clicking once on the Bid Date column header.

The Open Estimate dialog:

![Open Estimate Dialog]

Note: For your convenience, B2W Estimate “remembers” your filtering and sorting preferences within the Open Estimate dialog until you change them, even if you close and reopen the program. These settings are stored with your B2W Estimate user account, so they will be remembered for you even if you log in from a different computer.
The Estimate Information Tab

The Estimate Information tab is a "cover sheet" for your estimate, where general information is stored. The tab is divided into three sections: Bid Information, Project Information, and General Information. It is important to fill in as much information as possible, as many of these fields will be printed at the top of your reports and bid forms later on.

Included on the Estimate Information tab is an area for minority participation requirements as well as user-defined fields. These topics will be discussed in more detail during your formalized B2W Estimate training session.

Verify that you are on the Estimate Information tab for your new estimate, and take a moment to review the various fields that are shown here. You can enter some basic information at this point if you like.

The Estimate Information tab:

The Status Bar

The Status Bar is located at the bottom of the estimate window. This area is updated in real time as you work within the estimate, and gives you totals for the
estimate’s direct and indirect costs, bond, markup dollars, markup percent, and total bid price.

**The Status Bar:**

Since you’ve not yet added any items to your new estimate, the Status Bar displays zero values. When you add items and components to the estimate, you will see how the Status Bar makes it easy to see the effect of a change in the estimate, and eliminates the need to manually recalculate the bid to get a feel for “where you’re at.”

**For Further Study**

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Adding User Defined Fields to your current estimate
- Creating default User Defined Fields that are present in all estimates you create.
- Setting your estimate’s Minority Participation Goals
- Duplicating estimates
- Deleting estimates
- Filtering and sorting within the Open Estimate dialog
- Quickly accessing recently opened estimates
- Using the Estimate Search feature
- Using the Columns Manager to configure the Open Estimate dialog
- Customizing the Status Bar
The Item Listing Tab

Navigate to the **Item Listing** tab in your new estimate. The Item Listing tab is a customizable spreadsheet-style view of all of the pay items and indirect items in your estimate. Here, you can add items to the estimate, choose cost methods, and enter item quantities. In an extremely simple estimate, you could do nearly everything on this one tab.

### The Item Listing Tab:

![Image of Item Listing Tab]

**Adding Items to an Estimate**

While new items can always be created on-the-fly within any estimate, you will likely find that adding items from the Item Databases area to your estimate is a great time saver. When you add items to an estimate, all the cost detail and other information that you associated with each item within the Item Databases area will come into your estimate automatically.

The Item Listing tab is one of two estimating tabs where you can add items to your estimate. The pay items that you add will eventually receive prices, and will appear on your printed bid forms. The indirect items that you add will generate
indirect costs, and those costs will eventually be distributed throughout one or more of your pay items.

**Add Items to an Estimate**

1. Verify that you are on the Item Listing tab for your new estimate.

2. Click **Add Items** on the toolbar.

3. In the Add Items dialog, select the Pay Items database in the Show items in pane.

4. Place checkmarks next to the first 5 items on the list, items 100 through 500, as shown below:

5. Now select the Indirect Database in the Show items in pane, and place checkmarks next to a few indirect items.

6. Click **Add** to add the selected items to your estimate.

7. On the Item Listing tab, enter quantities for your pay items and indirect items. You may toggle between the two types of items by using the Show Items combo box in the upper right.
For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Using the Columns Manager to configure your view on the Item Listing tab
- Filtering and sorting the item list
- Grouping items by alternate, phase, or work type
- Creating new items on-the-fly
- Importing items from an external source
- Using Lock Types
- Copying item level information to Microsoft Excel
- Exporting item information to Excel
- Using the hierarchical grid on the Item Listing tab
The Estimate Detail Tab

Navigate to the Estimate Detail tab in your new estimate.

Featuring a layout much like Resources and Item Databases, the Estimate Detail tab is where all of the detailed costing of your items is performed. The left-hand side has a Windows Explorer-like tree view that gives you instant access to all of the items, tasks, and cost components in the estimate. The right-hand side displays the properties of the item, task, or cost component that is highlighted in the tree view.

The Estimate Detail tab supports unlimited levels of detail for items and tasks. A detailed item can contain any number of tasks or other components, and a detailed task can have multiple tasks and components underneath it, building an unlimited cost structure.

The Estimate Detail tab:
Adding Components

Even if you build every estimate by adding fully detailed items from item databases, you will still often find the need to add additional resource components to certain items in your estimate. You can add these resource components to any detailed item, detailed task, or crew in your estimate.

Add Components to a Detailed Pay Item

1. On the Estimate Detail tab treeview, select a detailed pay item, such as item number 300 – Fine Grading.

2. Click Add Components on the toolbar. The Add Components dialog appears, as it did earlier when you added components to crew templates and task templates.

3. Use the Add Components dialog to select some material components, and any other components you wish to add. Click Add, then close the Add Components dialog.

Configuring Components

Detailed items with “child” cost components appear on the Estimate Detail tab tree view with a plus sign next to their descriptions. Just like in your Windows Explorer, you can click the plus sign to expand an item’s structure. When you expand an item, the child components that comprise that item’s cost structure appear below the item. If you click one of these child components, the detail for that component will appear in the right-hand pane – just like in Resources.

Take a moment to expand some of the pay items in your estimate. Select a few of the child components within those items, and notice how the information visible on the right-hand side changes as you select various component types. This information can be modified as you wish, to control the cost of this portion your estimate.

Global Edits

B2W Estimate’s Global Edits feature allows you to edit the properties of cost components throughout the entire estimate, eliminating the need to edit numerous individual components to make large-scale changes.

When you use Global Edits to make changes to a cost component, every instance of that component in your current estimate will update to reflect that change. These changes do not apply to that component in Resources, or in any other estimate.
Changes you make in Global Edits apply to all components you have already added to your current estimate, and also to further additions of those same components to your estimate. In other words, if you add an equipment component to your estimate, and use Global Edits to change its base cost, then all subsequent additions of that equipment component to your estimate will use the new globally edited base cost.

Perform a Global Edit

1. Click the Costing menu, then select Global Edits...
2. The Global Edits dialog appears, as shown below:

3. Take a moment to make some changes within the Global Edits dialog—for example, a material unit price, or a labor base cost.
4. When you are finished making changes, click Apply, then click OK to verify your changes. Notice how the Direct Cost value on the Status Bar updates to reflect the changes that you have applied to your current estimate.
5. Click OK to close the Global Edits dialog.

The Estimate Check Wizard

The Estimate Check Wizard is designed to find problems in the estimate that you may have overlooked, and bring them to your attention before the bid is delivered to a customer.
When scanning an estimate for potential problems, the Estimate Check Wizard searches for oversights like items with zero costs or prices, undistributed values, and RFQ groups with no assigned subcontractor or vendor.

**Run the Estimate Check Wizard**

1. Click **Estimate Check Wizard** on the toolbar. The Estimate Check Wizard appears, as shown below:

2. Verify the criteria that the Estimate Check Wizard will search for by placing checkmarks in the appropriate boxes.

3. To run the wizard, click **Start**. B2W Estimate will search the estimate for the selected problems, and return a results dialog which displays the problems found in the estimate.

4. To resolve a problem, click on the problem in the results dialog, then click **Go To**. B2W Estimate will take you to the problem so you can resolve it.

5. Click **Next** to go to the next problem.

6. Repeat steps 4 and 5 as necessary.

7. Once you have repaired all of the problems, click **Recheck** to re-run the check wizard and verify that all problems are fixed.

8. Click **Close** to exit the Estimate Check Wizard.
Reports

B2W Estimate is pre-packaged with a variety of estimate reports that allow you to print detailed documentation of all aspects of the estimating process, including item and estimate summary reports, as well as cost detail reports.

**Preview and Print B2W Estimate Reports**

1. Click **Print** on the toolbar. The Print dialog appears, as shown below:

![Print dialog](image)

2. In the **Printer** area, select or verify the printer you will be printing to.

3. In the **Print Report** area, select the report you wish to print.

4. In the **Copies** area, enter the number of copies you wish to print.

5. In the **Print Range** area, select the range of pages you wish to print.

6. If you wish to preview the selected report on-screen before printing, simply click the **Preview** button. Or, simply click **OK** to send the desired report to your printer.
Note: Another way to print specialized reports is to right-click on an item or group entry in the Estimate Detail tab tree view, then select Print on the context menu.

For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Filtering the tree view
- Assigning pay items to phase and alternate groups
- Grouping items by phase, alternate, or work type
- Performing a “selective global edit” that applies only to a specific phase, alternate, work type, item, or task
- Creating new items on-the-fly
- Importing items from an external source
- Using Lock Types
- Suppressing items and tasks
- Configuring each component type
- Creating new tasks and new trucking on-the-fly
- Using the estimate trucking calculator
- Moving, copying, and reordering items and components on the Estimate Detail tab tree view
- Changing item and task cost methods
- Assigning comments to items and components
- Metric/Imperial conversions
- Copying or exporting report information to other formats
- Replacing labor or equipment rate classes
- Using Cost Groups (Available in the Enterprise version of B2W Estimate)
- Using the Recycle Bin to restore deleted components
The Bid Pricing Strategy Tab

Once you have completed the costing process for an estimate, you are ready to begin the process of pricing your estimate, a process commonly referred to as “bid closing.” The typical bid closing process involves three estimate tabs:

1. On the Bid Pricing Strategy tab, you determine values for bond, overhead, profit, and in some cases, indirect costs.

2. On the Distribution Strategy tab, you choose the pay items where your estimate’s indirect, bond, overhead, and profit values are to be distributed, and specify the methods of distribution that will be used.

3. On the Item Pricing tab, you perform the distribution, and make any necessary manual adjustment to your item prices.

Navigate to the Bid Pricing Strategy tab. This tab is the first step in the bid closing process. It is here that you can determine values for bond, overhead, profit, and bid level taxes. Had we not calculated our indirect costs through the use of indirect items, you could also have specified your estimate’s indirect costs here as well.

This is also the first of two tabs on which you can enter Adds/Cuts, and, provided you are cutting direct cost, specify unique distribution schemes for each.
The Bid Pricing Strategy tab:

**Determining Values**

The *Determining values* area contains a tree view that displays the types of values that can be calculated in your current estimate.

In just a moment, we will be selecting various nodes in the tree view to see how these values are being calculated. When you select a node within the *Determining values* tree view, B2W Estimate displays the calculation settings to the right. The methods of calculating these values are configurable by you, and will be explored in more detail during your B2W Estimate training session.

**Bond**

Click the **Bond** node in the *Determining values* tree view, and notice that a sample bond table appears to the right. While the bond table that your company uses is likely to have different values, the sample bond table should give you a sense of how bond is calculated in B2W Estimate.

**Overhead**

Click the **Overhead** node in the tree view. Your current estimate should be using an overhead calculation method that allows you to enter a unique overhead
percentage for all the basic cost categories. Take a moment to enter or modify some of these percentages now.

Profit

Click the **Profit** node in the tree view. Your current estimate should be using a profit calculation method that allows you to enter a unique profit percentage for direct cost, indirect costs, bond costs, and overhead. Take a moment to enter some percentages now.

Bid-Level Taxes

B2W Estimate allows you to enter one or more bid-level taxes that are applied to the total price of all pay items. This is useful for broad taxes such as GST tax.

Click the **Bid-Level Taxes** node in the tree view. Your current estimate should not currently be using a bid level tax. To add a bid level tax that is stored in the Options dialog, click the **Add** button.

Notice that you can choose whether bond in your current estimate should calculate on **Total Bid Price Including Bid-Level Tax** or **Total Bid Price Excluding Bid-Level Tax**.

Adds/Cuts

The Adds/Cuts feature allows you to make adjustments to your current estimate by adding or subtracting dollar values for direct cost categories, indirect cost, overhead, profit, and bond.

For example, you could adjust the equipment cost of your estimate by creating a cut for $5,000, and then distribute that cut out of your mobilization item.

Adds/cuts can be configured on either the Bid Pricing Strategy tab or the Item Pricing tab.
For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Creating default bond tables
- Using the Options dialog to set default calculation methods for indirect costs, bond, overhead, profit, and bid-level taxes
- Using Estimate Options to override calculation methods for indirect costs, bond, overhead, profit, and bid-level taxes
- Choosing the cost categories for which you can enter percentages for indirect, overhead, or profit calculations
- Using multi-level entry of percentages (by alternate, phase, or work type) to calculate indirect costs, overhead, and profit.
- Creating adds/cuts
- Reversing adds/cuts
- Setting distribution strategies for adds/cuts.
The Distribution Strategy Tab

Navigate to the Distribution Strategy tab. This tab, representing what is typically the second step in the bid closing process, is where you specify the methods of distribution that B2W Estimate uses to distribute the values that you calculated on the Bid Pricing Strategy tab—indirect costs, bond, overhead, and profit. You can also specify a distribution strategy for differences—the values that are “left over” after a distribution is performed.

Simply stated, B2W Estimate needs to know how and where to distribute these values.

The Distribution Strategy tab:

The tree view on the left-hand side of the Distribution Strategy tab displays the values that need to be distributed in your current estimate.
The icon next to each value reflects its distribution status:

- A gray dot indicates that the node has a zero dollar value.
- A red dot indicates that the value has not yet been distributed, or is only partially distributed.
- A green dot indicates that the value has been properly distributed into your pay items.

You can specify unique distribution strategies for indirect costs, bond, overhead, profit, and differences. The basic steps are simple:

1. Select a value type in the tree view.
2. Select a method of distribution. There are many possible distribution methods, including several proportional distributions.
3. Tell B2W Estimate which pay items to distribute the value into. You can distribute into all pay items, or select specific pay items from a list.

For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Set a distribution strategy for individual indirect items
- Set a distribution strategy for individual phases, alternates, or work types
- Learn about each possible distribution method
The Item Pricing Tab

Navigate to the Item Pricing tab. This tab represents the final step in the bid closing process. This is typically where your final distributions are performed, and where you can tweak the unit prices for the pay items in your estimate.

Using the auto distribute feature

The Auto Distribute command is your way of telling B2W Estimate to perform all distributions, using the distribution schemes you specified on the Distribution Strategy tab.

To trigger a distribution, simply click Auto Distribute on the toolbar. Notice that when you perform a distribution, your pay items unit and total prices update to reflect the appropriate values, as do the various fields on the Status Bar.
Distributing a difference

In the course of rounding or modifying item prices there inevitably will be a small difference between the Bid Price and the Target Bid Price. This difference is displayed on the Item Pricing tab in the Difference field.

To eliminate this difference, and achieve a perfectly balanced bid, click the Distribute difference button. When B2W Estimate distributes the difference, it uses the distribution scheme specified for differences on the Distribution Strategy tab.

Manually adjusting unit prices

Once you have performed your distributions, and are nearing the point of printing out and submitting a bid form, you are ready to make any last minute manual adjustments to the unit prices of specific pay items.

To adjust the unit bid prices of specific pay items, simply click into the Unit Bid Price column for any pay item, and enter your desired price. Keep an eye on the Difference field, so you know how far out of balance your adjustments are taking you.

For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Using the Columns Manager to configure your view on the Item Pricing tab
- Setting prices to “balanced prices”
- Setting an estimate status to “Closed”
- Creating adds/cuts
- Reversing adds/cuts
- Pricing a bid that is using takeoff quantities
The Summary Tab

Navigate to the Summary tab. The information on this tab is a snapshot of your current estimate. The information displayed here reflects the current state of your estimate. The Summary tab is a great place to review the numbers before, during, and after the bid closing process.

The Summary tab:

Customizing the Summary

To help you retrieve the exact numbers you need, B2W Estimate allows you to customize the way information is presented on the Summary tab. Take a moment to experiment with the various options on the Summary tab, and notice how B2W Estimate always presents your estimate summary in a way that corresponds to your selections.
For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Filter the estimate summary by work type and work subtype
- Showing percentages of cost or price
- Showing all cost categories or major categories only
- Breaking down direct costs, indirect costs, or both
- Tracking minority participation
The Bid Form Tab

Navigate to the **Bid Form** tab. Here you will configure the bid form for your current estimate, configure the list of customers to who you will submit a bid form, and specify for each customer one or more bid form delivery methods.

Once more, notice that the screen is broken up into two sections. Since there are several steps to configure and submit bid forms to your customers, these steps are represented by entries in the left-hand list.

**The Bid Form tab:**

![Bid Form Screen Screenshot]

**Terms and Conditions**

The **Terms and Conditions** node allows you to configure the "fine print" that appears on your estimate's private bid form, such as exclusions and payment terms.

**Bid Form Notes**

Bid form notes are typically used to list exclusions. These notes appear listed under the pay items on your bid form. You can add notes that are stored within
the Options dialog, or create them on-the-fly. Once notes have been added or created, you can reorder the notes so they appear listed in a specific order on your bid form.

**Add and Order Bid Form Notes**

1. Click **Add Note**.
2. The Add Notes dialog appears, listing the notes that have been created within the Options dialog. Place checkmarks next to the notes you wish to add.
3. Click **OK**.
4. Take a moment to order the notes by highlighting a note, then clicking **Move Bid Form Note Up** or **Move Bid Form Note Down**.

**Payment Terms**

B2W Estimate allows you to select payment terms to appear on your bid form. Use the combo box in the **Payment Terms** area to select payment terms. Just like bid form notes, the choices that you see within the combo box are stored on the Terms and Conditions page within the Options dialog.

If you wish to type in payment terms that are unique to this estimate, select **Custom**, then type in the desired text.

**Bid Form Settings**

Click the **Bid Form Settings** entry in the left-hand list. You can now configure the appearance and organization of your current estimate's bid form.

In the **Bid form** area in the right-hand pane, you can indicate how you would like your pay items to be grouped on the bid form. You can also indicate whether you would like to print subtotals for any groupings that you have specified, and whether or not the prices for alternate items should be included in your estimate's total price.

In the **Bid form header** area, you can specify whether your company information should appear on your bid forms, and if so, on which pages.

In the **Items** area, you can select the item level information that you would like to appear on your bid forms.
Finally, in the **Bid introduction** area, you can enter a text introduction which will preface your item list on the bid form.

**Print, Fax, and E-mail Bid Forms**

Click the **Print/Fax/E-mail Bid Forms** entry in the left-hand list. You can now configure the list of customers to whom you wish to submit a bid form. For each customer on the list, you can specify one or more of the following bid form delivery methods:

- **Print** – B2W Estimate sends the bid form to the printer of your choice.
- **Fax** – B2W Estimate faxes your bid form by integrating with any e-mail based fax service. A customized subject and message can be entered, which typically appears on the cover page, if supported by your fax service.
- **E-mail** – A PDF file is generated for the bid form, and an e-mail is sent to each with the attached file, with a customized subject and message.

**Configuring the customer list**

The **Send Bid Forms** area displays a list of customers for the current estimate. Since this is the first time you have visited this tab, you will initially see only the primary customer that you chose during the New Estimate Wizard. You can add additional customers to the list, edit the information on the list, and specify for each customer one or more delivery methods that will be used to send the bid form.

For example, you can choose to print the bid form for one customer, while faxing and e-mailing the bid form to another customer. For each customer, simply place checkmarks in the boxes that correspond to your desired methods of bid form delivery.

The **Add Customer...** button is used to add customers to the list. Phone numbers, fax numbers, contact names, and contact e-mail addresses can be edited on screen. To edit other information such as address, country, etc., select a customer on the list, then click the **Edit...** button.

**Previewing and sending bid forms**

After configuring your customer list, you are ready to preview and send your bid forms. If you wish to preview your bid form before sending it, select a customer on the list, then click the **Preview** button. A preview of the bid form for that customer will appear.

To send bid forms to all customers on the list, click **Send to All Customers**, then click **OK** to verify the sending process. If you have specified a send method
of e-mail or fax for any customer, B2W Estimate will prompt you for a subject line and message to accompany the bid form.

To send bid forms only to certain customers, select multiple customers with a CTRL-click or a SHIFT-click, click Send RFQs to Selected Customers, then click OK to verify the sending process.

**For Further Study**

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Storing default estimate notes and payment terms in the Options dialog
- Configuring B2W Estimate to integrate with your e-mail based fax service

**The Audit Trail Tab**

Note: B2W Estimate’s Audit Trail feature is only available for owners of the Enterprise edition of B2W Estimate.

Navigate to the final estimating tab, the Audit Trail tab. The audit trail capabilities within B2W Estimate allow you to review a detailed history of changes made within each estimate.

When audit trail tracking is enabled, B2W Estimate tracks all activity which leads to - or could potentially lead to - a change in the overall cost of your estimate, the current bid price of your estimate, or the target bid price of your estimate. For example, B2W Estimate tracks the date and time when components are added to or deleted from an estimate, and records the name of the user who made the changes. When values such as unit costs or production rates are modified - either at the component level or via global edits - B2W Estimate records the previous values, creating a detailed event log for each portion of your estimate. B2W Estimate also tracks when the descriptions of items or components are changed.

All of these changes are visible on the Audit Trail tab within your estimate. The list of changes is filterable, sortable, and searchable, and also includes a columns manager which allows you to configure your screen to display only the information which matters most to you!
The Audit Trail tab:

Note that in order to see information on the Audit Trail tab, the feature must first be enabled within Estimate Options. To enable this feature, you must belong to a group which has permission to do so.

Conclusion

You now have a general sense of how an estimate comes together. The next chapter will introduce you to Subcontractor Management and Vendor Management.
Chapter 6
Subcontractor and Vendor Management

In this chapter, you will be introduced to Subcontractor Management and Vendor Management, two features which allow you to request quotes and analyze quoted prices for large groups of items, tasks, and materials.

Subcontractor Management

B2W Estimate’s Subcontractor Management feature streamlines the process of working with subcontractors in larger estimates.

In estimates with large numbers of subcontracted items and tasks, you will likely find it inefficient to analyze and assign subcontractor prices at the item and task level on the Estimate Detail tab, as you would in a smaller estimate. In a large estimate, it is often more practical to analyze and assign subcontractors at the group level.

For example, if you subcontract out striping work, you would typically not assign one striping item to Subcontractor A, and another striping item to Subcontractor B. You would select a single striping subcontractor to perform all of the striping work in your estimate. Therein lies the beauty of Subcontractor Management, which gives you the ability to request quotes, analyze prices, and select subcontractors based on user defined groupings of similar work items and tasks.

To demonstrate Subcontractor Management, let’s open one of the sample estimates within the B2W Estimate Sample database.

Access Subcontractor Management

1. Use the Open Estimate dialog to open the NH DOT Improvements Of Rt 93, Concord estimate.

2. Click Subcontractor Management on the toolbar to navigate to the Subcontractor Management view.
Step 1: Create your RFQ Groups

Normally, when you navigate to the Subcontractor Management view for the first time within a particular estimate, the Create Subcontractor RFQ Groups Wizard will appear. This wizard leads you through the process of creating your RFQ groups—typically based on work types—and specifying which subcontractors are going to be providing quotes for each group.

Since the sample estimate you are currently viewing already has existing RFQ groups, the wizard does not appear when you navigate to Subcontractor Management. Instead, you are brought directly to the Manage Subcontractor RFQ Groups tab. This area features a tree view much like the one we saw on the Estimate Detail tab.

The Manage Subcontractor RFQ Groups tab:

Notice that RFQ Groups is selected in the tree view. Also in the tree view, below the RFQ Groups node, notice the RFQ groups that have already been created within the sample estimate. We'll be talking about these shortly.

Since RFQ Groups is currently selected, the right-hand side of the screen displays information pertaining to each of the groups, including the name of each
assigned subcontractor as well as their total quoted price and adjustment amounts.

**Step 2: Send RFQs to your subcontractors**

After creating your RFQ groups, your next step would typically be to send requests for quotes to the subcontractors that have been specified for each group.

Click the **Send Subcontractor RFQs** tab near the top of the screen. Notice that there are two entries in the left hand list; **RFQ Notes**, and **Print/Fax/E-mail RFQs**. If these entries seem familiar, that’s because we saw very similar functionality on the Bid Forms tab within the Estimate area.

Click **RFQ Notes** in the list. This is where you can add or create custom notes for RFQ groups or individual subcontractors. The notes that you create on this tab are printed on the RFQ forms that you send to your subcontractors.

**The Send Subcontractor RFQs tab, RFQ Notes:**

Now click **Print/Fax/Email RFQs** in the list. This is where you specify a method for sending RFQs for every subcontractor that is a part of an RFQ group. You can also preview and send the RFQs from this page as well. Notice that RFQs, like
bid forms, can be submitted to your subcontractors via print-out, fax, or e-mail. This works almost identically to the Print/Fax/E-mail Bid Forms feature that we discussed earlier.

The Send Subcontractor RFQs tab, Print/Fax/E-mail RFQs:

![Image of B2W Estimate interface]

**Step 3: Enter your subcontractor prices and adjustments**

After your subcontractors have returned their completed RFQs, your next step is to enter their prices into B2W Estimate.

Once more, click to the Manage Subcontractor RFQ Groups tab, then click the plus sign next to one of the groups that are listed in the tree view. The subcontractors that had been specified for that group appear below the group name.

Now click one of those subcontractors in the tree view. On the right-hand side of the screen, the Subcontractor form appears. This is where you enter the pricing that has been returned to you by the selected subcontractor.
The Subcontractor form:

You can enter either a unit or total price for each item and task within the group. If a subcontractor has omitted pricing for any items or tasks in the group, you can use a plug price. This ensures a more meaningful comparison of one sub to another.

When appropriate, you can also create an unlimited number of adjustments for any subcontractor. Below are a few examples of common adjustments:

- Discounts that the subcontractor offers after their original prices have been submitted
- Subcontractor mobilization
- Costs that you can incur for supervision of a specific subcontractor

The adjustments that you create here are automatically distributed according to a user-defined method of distribution.

Plug prices and adjustments will be discussed further during your formal training session.
Step 4: Compare quotes, and assign a subcontractor

After you have entered pricing and adjustments (if necessary) for each of the subcontractors who are quoting the items and tasks within an RFQ group, you are ready to compare the results.

In the tree view, select an RFQ group. Notice that three new tabs appear on the right: the RFQ Group Information tab, the Quote Comparison tab, and the Adjustment Distribution Strategy tab.

RFQ Group Information tab

On this tab, you can add or remove items and tasks from the RFQ group. You can also add or remove subcontractors from the list.

The RFQ Group Information tab:

This is also one of the two places where you can choose which subcontractor is assigned to perform the items and tasks in the RFQ group.

Notice that in the tree view area on the right, there is a virtual (Plug) subcontractor. The values associated with (Plug) are used as the default cost for
the items and tasks in an RFQ group, in the event that a quote for a specific item or task is omitted by a subcontractor.

If you have unit costs stored in Resources for your subcontracted items and tasks, these values are brought into your estimates as the default plug unit prices for these components. You can modify these values as required.

**Quote Comparison tab**

Now click to the **Quote Comparison** tab. This is where you can compare subcontractors’ quoted prices for items and tasks inside an RFQ group, and eventually decide which subcontractors to assign to each group.

**The Quote Comparison tab:**

At the bottom of the page is a table which displays the following information for up to four subcontractors at a time:

- Total quoted price
- Plug total for items not quoted
- Adjustments
- Total adjusted price

Once you have analyzed the prices from each subcontractor, B2W Estimate allows you to quickly and easily assign a subcontractor to all the items in an RFQ group.

To assign a subcontractor to an RFQ group, simply choose the desired subcontractor in the **Assign this group** combo box. When you assign a subcontractor to an RFQ group, the unit prices you have entered for that subcontractor—along with any adjustments—will be assigned to the unit costs for the items and tasks within that group.

Note that you can “split” the assignment of an RFQ group by selecting (Multiple) in the **Assign this group** combo box.

**Adjustment Distribution Strategy**

Finally, click to the **Adjustment Distribution Strategy** tab. This is where you specify what happens to the adjustments you have associated with the subcontractor who is assigned to this group.

**Adjustment Distribution Strategy tab:**
Adjustments can be distributed in a variety of ways into—or out of—a combination of items and tasks that belong to the RFQ group, or into a detailed pay item elsewhere in your estimate.

For Further Study

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Strategies for creating RFQ groups
- Creating and distributing subcontractor adjustments
- Suppressing items and tasks within Subcontractor Management
- Using plug prices
- Using Comparison items and tasks to compare self-performed unit costs with subcontractor quotes
- Assigning an RFQ group to multiple subcontractors
Vendor Management

Nearly identical in structure to the Subcontractor Management feature, B2W Estimate's Vendor Management feature streamlines the process of working with vendors in larger estimates.

In estimates with large numbers of materials, you will likely find it inefficient to analyze and assign vendor prices at the material level on the Estimate Detail tab, as you would in a smaller estimate. In a large estimate, it is often more practical to analyze and assign vendors at the group level.

For example, if you purchasing aggregates, you would typically not assign one type of aggregate to Vendor A, and another aggregate to Vendor B. You would select a single aggregate supplier to all of the aggregate materials in your estimate. Therein lies the beauty of Vendor Management – a module which gives you the ability to request quotes, analyze prices, and select vendors based on user defined groupings of similar materials.

To demonstrate the Vendor Management module, let’s continue to use the same sample estimate as we used for our recent tour of Subcontractor Management.

Navigate to Vendor Management

1. Verify that you are still within the NH DOT Improvements Of Rt 93, Concord estimate.

2. Click Vendor Management on the toolbar to navigate to the Vendor Management view.

Step 1: Create your RFQ Groups

Normally, when you navigate to the Vendor Management view for the first time within a particular estimate, the Create Vendor RFQ Groups Wizard will appear. This wizard leads you through the process of creating your RFQ groups—typically based on work types—and specifying which vendors are going to be providing quotes for each group.

Since the sample estimate you are currently viewing already has existing RFQ groups, the wizard does not appear when you navigate to Vendor Management. Instead, you are brought directly to the Manage Vendor RFQ Groups tab. This area features a tree view much like the one we saw on the Estimate Detail tab, and nearly identical to the one we looked at in Subcontractor Management.
The Manage Vendor RFQ Groups tab:

Notice that RFQ Groups is selected in the tree view. Also in the tree view, below the RFQ Groups node, notice the RFQ groups that have already been created within the sample estimate. We’ll be talking about these shortly.

Since RFQ Groups is currently selected, the right hand side of the screen displays information pertaining to each of the groups, including the name of each assigned vendor, as well as their total quoted price and adjustment amounts.

**Step 2: Send RFQs to your vendors**

After creating your RFQ groups, your next step would typically be to send requests for quotes to the vendors that have been specified for each group.

Click the Send Vendor RFQs tab near the top of the screen. Notice that there are now two entries in the left hand list; RFQ Notes, and Print/Fax/E-mail RFQs. If these entries seem familiar, that’s because we saw very similar functionality within Subcontractor Management.

Click RFQ Notes in the list. This is where you can add or create custom notes for RFQ groups or individual vendors. The notes that you create on this tab are printed on the RFQ forms that you send to your vendors.
The Send Vendor RFQs tab, RFQ Notes:

Now click **Print/Fax/Email RFQs** in the list. This is where you specify a method for sending RFQs for every vendor that is a part of an RFQ group. You can also preview and send the RFQs from this page as well. Notice that RFQs, like bid forms, can be submitted to your vendors via print-out, fax, or e-mail. This works almost identically to the Print/Fax/E-mail Bid Forms feature that we discussed earlier.
Step 3: Enter your vendor prices and adjustments

After your vendors have returned their completed RFQs, the next step is to enter their prices into B2W Estimate.

Once more, click to the Manage Vendor RFQ Groups tab, then click the plus sign next to one of the groups that are listed in the tree view. The vendors that had been specified for that group appear below the group name.

Now click one of those vendors in the tree view. On the right-hand side of the screen, the Vendor form appears. This is where you enter the pricing that has been returned to you by the selected vendor.
The Vendor form:

You can enter a unit price, tax percent, and trucking cost for each material within the group. If a vendor has omitted pricing for any materials in the group, you can use a plug price. This ensures a more meaningful comparison of one vendor to another.

When appropriate, you can also create an unlimited number of adjustments for any vendor. Below are a few examples of common adjustments:

- Discounts that the vendor offers after their original prices have been submitted
- Lump sum trucking

The adjustments that you create here are automatically distributed according to a user-defined method of distribution.

Plug prices and adjustments will be discussed further during your formal training session.
Step 4: Compare quotes, and assign a vendor

After you have entered pricing and adjustments (if necessary) for each of the vendors who are quoting the materials within an RFQ group, you are ready to compare the results.

In the tree view, select an RFQ group. Notice that three new tabs appear on the right: the RFQ Group Information tab, the Quote Comparison tab, and the Adjustment Distribution Strategy tab.

RFQ Group Information tab

On this tab, you can add or remove materials from the RFQ group. You can also add or remove vendors.

The RFQ Group Information tab:

This is also one of the two places where you can choose which vendor is assigned to provide the materials in the RFQ group.

In the Materials in this RFQ group area, you will see a Plug Unit Price column. These values are used as the default cost for the items and tasks in an
RFQ group, in the event that a quote for a specific item or task is omitted by a subcontractor.

If you have base costs stored in Resources for your materials, these values are brought into your estimates as the default plug base prices for these materials. You can modify these values as required.

**Quote Comparison tab**

Now click to the **Quote Comparison** tab. This is where you can compare vendors’ quoted prices for materials inside an RFQ group, and eventually decide which vendors to assign to each group.

**The Quote Comparison tab:**

![Image of the Quote Comparison tab](image)

At the bottom of the page is a table which displays the following information for up to four vendors at a time:

- Total quoted price
- Plug total for items not quoted
- Adjustments
Total adjusted price

Once you have analyzed the prices from each vendor, B2W Estimate allows you to quickly and easily assign a vendor to all the materials in an RFQ group.

To assign a vendor to an RFQ group, simply choose the desired vendor in the Assign this group to combo box. When you assign a vendor to an RFQ group, the unit prices you have entered for that vendor—along with any adjustments—are assigned to the units costs for the materials within that group.

Note that you can “split” the assignment of an RFQ group by selecting (Multiple) in the Assign this group to combo box.

Adjustment Distribution Strategy

Finally, click to the Adjustment Distribution Strategy tab. This is where you specify what happens to the adjustments you have associated with the vendor who is assigned to this group.

Adjustment Distribution Strategy tab:
Adjustments can be distributed in a variety of ways into—or out of—a combination of materials that belong to the RFQ group, or into a detailed pay item elsewhere in your estimate.

**For Further Study**

Here are some additional features that will be covered in your B2W Estimate training session. For more information about these features simply press F1 on your keyboard to launch the B2W Estimate Online Help System.

- Strategies for creating RFQ groups
- Creating and distributing vendor adjustments
- Using plug prices
- Assigning an RFQ group to multiple vendors

**Conclusion**

We hope you have enjoyed this guided tour of B2W Estimate! You should now have a solid foundation on which to build further skills during your formal B2W Estimate training session.

As always, please feel free to contact the B2W Technical Support department at **(888) 390-8822** or support@b2wsoftware.com if you have any questions about B2W Estimate.