

Course Agenda

Boot Camp for Sage Estimating (SQL)

Sage 300 CRE | Instructor: Joe Callahan

Course Overview

In this online class, you will become familiar with basic Sage Estimating workflow to create a complete estimate using the BNi General Construction Costbook. The 8-hour lecture is broken up into 4 sessions of 2-hour web instruction spanning 2 full days, each covering different aspects of fundamental software workflow. Activity workbooks will be emailed provided prior to class and must be printed.

Agenda

Day 1

- **Morning** **9:00-11:00am**
 - Connecting to the training database
 - Creating an estimate
 - Building an estimate
 - Performing database takeoff
 - Performing one-time item takeoff
 - Working with Locations
- **Independent Activity** **11:00am-1:00pm**
 - Creating a new estimate for a new warehouse project
 - Using different takeoff methods to cover construction scope
 - Assign the above takeoff to different cost locations when appropriate
- **Afternoon** **1:00pm-3:00pm**
 - Manipulating an estimate
 - Working with spreadsheet layouts
 - Using the detail window
 - Working with spreadsheet sequences
 - Working with overline totals
- **Independent Activity** **3:00pm-5:00pm**
 - Continued takeoff to complete to construction scope
 - Navigating the spreadsheet using manipulation techniques discussed above
 - Modifying the item information specific to project

Day 2

- **Morning**

9:00-11:00am

- Brief review of questions submitted during Day 1
- Completing an estimate
 - Scanning for incomplete entries
 - Updating the estimate pricing from the database
 - Working with estimate totals
 - Creating totals page templates
- Reporting on an estimate
 - Standard estimate report
 - Spreadsheet report
 - Customizing the report options

- **Independent Activity**

11:00am-1:00pm

- Assigning markups (addons) to the project
- Navigating the spreadsheet using completion techniques discussed above
- Customizing the standard estimate and spreadsheet reports

- **Afternoon**

1:00pm-3:00pm

- Database Maintenance
 - Saving one-time items to the database
 - Updating the database from an estimate
- Database Development
 - Creating phases
 - Creating items
 - Creating addons
- Introduction to Database Editor

- **Independent Activity**

3:00pm-5:00pm

- Updating the database from estimate content
- Basic database modifications
- Exploration of Database Editor