### EstimatorXpress® Plumbing & Heating Trade Edition *Tutorial*

EstimatorXpress® Plumbing & Heating Trade Edition Tutorial

Software by Adrian Wild, Steven Mulgrew, James Pizzey & Robin Bodle

Written by James Pizzey, Joanna Mulgrew, Steven Mulgrew & Olivia Wild House Builder XL Limited

© House Builder XL Limited 2011

\_\_\_\_\_

# HOW TO USE THIS BOOK AND GET STARTED

Firstly, we would like to thank you for choosing **EstimatorXpress**<sup>®</sup>. We hope that you find **EstimatorXpress**<sup>®</sup> an invaluable tool, helping you to price work quickly and accurately and manage your building projects professionally and profitably.

#### Installing EstimatorXpress®

For full details on installing and registering your EstimatorXpress® software see page 7.

#### What Can EstimatorXpress® Do?

This is perhaps one of the most important sections of this guide as it summaries the capabilities of **EstimatorXpress**® and what it can do for you. For a detailed description see page 9.

#### Tutorials

To obtain maximum benefit from your **EstimatorXpress**® software, we recommend all new users work through the **Tutorial** in this guide. The Tutorial takes you through the costing and planning of a typical renovation job consisting of installing a new heating system and installing a new bathroom. This will normally take you approximately 1½ hours to complete. On completing the Tutorial you will have a good idea of how the system works and what it can do for you. See page 19 to start the Tutorial. Once you have familiarised yourself with **EstimatorXpress**® your estimating will speed up dramatically so that a typical job of this size will take just a few minutes.

#### **Getting Started With 'Real' Estimates**

Once you have grasped the principles of **EstimatorXpress**® you will want to start estimating immediately. However before you start working on a 'real' estimate it is essential to tailor the system to your own requirements to avoid repetitive adjustments to each estimate.

To do this you should:

- [1] Download latest materials prices from hbxl.co.uk into the software Price Book (see page 23)
- [2] Speak to your local builders merchant to agree terms on materials and enter them into the **Price Book** or subscribe to one of our merchant partners to have this step done automatically!
- [3] Check that the labour, plant and subcontract rates accord with your own business and if not, modify them to suit

#### **Additional Help**

HBXL takes the accuracy of your project costings as seriously as you do and unlike many companies, we don't skimp on the help we provide to get you and your team up and running as fast as possible. After all, the reason you have purchased **EstimatorXpress**® is to save you time! HBXL offers full technical support from the **Help Team** on **0845 1234 085** provided that you hold a valid **HBXL Support & Updates** subscription for **EstimatorXpress**®. For more information, please contact HBXL on **0845 1234 065**.



Additional Context Sensitive Help is also available on every software screen by pressing the **F1** key on your keyboard at any time or pressing the **Help button** on every screen.

\_\_\_\_\_

## Contents

HOW TO USE THIS BOOK AND GET STARTED	3
INSTALLING ESTIMATORXPRESS® & IMPORTANT NOTES 1. Install Your EstimatorXpress® Software 2. Launching EstimatorXpress® For The First Time 3. Downloading Latest Material Prices 4. Opening Accounts With EstimatorXpress® Merchant Partners	<b>7</b> 7 7 8 8
WHAT CAN ESTIMATORXPRESS® DO?	9
Estimating System Bar Chart Planner Report Manager Workbooks Supplied With EstimatorXpress® Plumbing & Heating Trade Edition Understanding The Different Types Of Workbooks The Composite Items Workbooks Workbooks with a Dimension/Quantity Entry section The Area, Perimeter And Volume Workbooks	9 12 13 14 15 15 16 16
PRINCIPLES OF ESTIMATING	17
PLUMBING & HEATING TUTORIAL Launching EstimatorXpress® & The Main Menu Setting Up EstimatorXpress® Downloading Latest Material Rates Into EstimatorXpress® Selecting New Materials From The HBXL Website Creating New Product In Your Price Book Creating the System Install & Bathroom Estimate Estimating the System Install & Bathroom Boiler & Gas Connections Viewing the Output for the Gas Pipes Copper Pipe End Feed 15mm Fixings Radiators Bathroom Soil Pipe & Waste Connections Pipe Work Bar Chart Planner Report Manager Printing Out A Customer Quotation In Microsoft® Word	<b>19</b> 22 23 25 28 30 36 36 43 46 50 55 64 72 81 87 91
GLOSSARY	94
ESTIMATORXPRESS® TERMS & CONDITIONS	102

\_\_\_\_\_

# INSTALLING ESTIMATORXPRESS® & IMPORTANT NOTES

#### 1. INSTALL YOUR ESTIMATORXPRESS® SOFTWARE

- 1. Insert CD into drive. The CD should Auto-run.
- 2. If Auto-run has been disabled, select Run from the Start Menu, type in D:\Setup.exe (where D: is your CD drive)
- 3. After the installation wizard has started, follow the on-screen instructions until the installation is complete.

#### 2. LAUNCHING ESTIMATORXPRESS® FOR THE FIRST TIME

Before attempting to run your EstimatorXpress® software, it is essential that you check the following:

- Ensure you are running Windows® 2000/ XP/ Vista\*/7\*
- Ensure you are running Microsoft® Word and Excel 2000 SR1/ XP/ 2003/ 2007/2010
- Ensure your Microsoft® Excel Macro settings are set to medium (for instructions on how to check this please see page 8)

\* Windows® Vista and 7 only support Microsoft® Word and Excel 2003, 2007 and 2010. Running earlier versions of Word and Excel with Windows® Vista or 7 is not recommended and is not supported.

1. To launch the system either double-click on the **EstimatorXpress**® icon on your desktop or select **EstimatorXpress**® from the Start, Programs Menu.



- 2. Once EstimatorXpress® starts opening, depending on your system settings, you may need to press Enable Macros button on the Microsoft® Excel virus protection dialog box.
- 3. You will then be required to follow the registration wizard to fill in your contact details and register your copy of **EstimatorXpress**®.

When complete, you will then see the **Main Menu** appears.



#### 3. DOWNLOADING LATEST MATERIAL PRICES

You must have a valid **HBXL Support & Updates** subscription in order to obtain access to the latest materials prices from the hbxl.co.uk website. You can then update your **EstimatorXpress® Price Book** with around 1500 generic products at trade prices automatically maintained for you by HBXL using **Price Tracker™ Technology**. **Price Tracker™** helps you to avoid the tedious and time-consuming task of keeping a **Price Book** up-to-date manually.

#### 4. OPENING ACCOUNTS WITH ESTIMATORXPRESS® MERCHANT PARTNERS

In addition you may also be able to open **HBXL Trade Accounts** with our Merchant Partners which will give you access to Merchant catalogues on-line @ hbxl.co.uk and the ability to download thousands of new products into your software. Please note that a fee may be payable to access a merchant catalogue and that you must have a valid **HBXL Support & Updates** subscription to obtain this service.

To find out more about opening Trade Accounts with our Merchant Partners, please contact HBXL on 0845 1234 085.

#### Important Notes about Excel Macros

When using Excel 2000 SR-1, Excel XP or Excel 2003 if a box doesn't pop up asking if you want to Enable Macros upon opening EstimatorXpress®, your macro security settings are set too high and your **EstimatorXpress®** software WILL NOT RUN. To remedy this open up Microsoft® Excel in the normal way and click Tools > Macro > Security.

On the dialog box that pops up click the Medium option then click OK. Close down Excel.

×	<u>E</u> dit <u>V</u> iew <u>I</u> ns	ert F <u>o</u> rmat	Too		osoft e PDF		el - Book2				
			1000	and the second	7	1	≩↓ X↓   @	📙 🦓 1009	% • 🕜 💂	Arial	
1	B	C	*	Error Checking			Н	1	J	K	
2	-			Speed <u>h</u>	•						
3				Shared Workspace					-		-
4				Share Workbook							-
5				Irack Changes							
7				Compare and Merge Workbooks							-
8											-
9				Protection	•						-
10				Online Collaboration					1		1
11				Goal Seek							1
12			1								Ť
13	1			Scenarios							1
14				Formula Auditing	•						
15				Macro	•		Macros		Alt+F		
16			-				100		AILTE	5	
17				Add-Ins		•	Record Ne	w Macro			
18			3	AutoCorrect Options			Security				
19				<u>C</u> ustomize			Marcal Basel		Alt+F1		
20						2	<u>V</u> isual Basi				
21				Options		00	Microsoft 9	Script <u>E</u> ditor	Alt+Shift+F1	1	
22						_			-		-
23											

The next time that you start up your **EstimatorXpress**® software, you should be presented with a dialog box asking if you want to Enable or disable the macros, click Enable.

# WHAT CAN ESTIMATORXPRESS® DO?

#### Welcome to EstimatorXpress®

Market leading **EstimatorXpress® Plumbing & Heating Trade edition** is loaded with tools to help you quickly and accurately budget and plan your plumbing and heating works from start to completion, calculating costs and quantities of materials, labour and plant as well as wastage. It even tells you when to order!

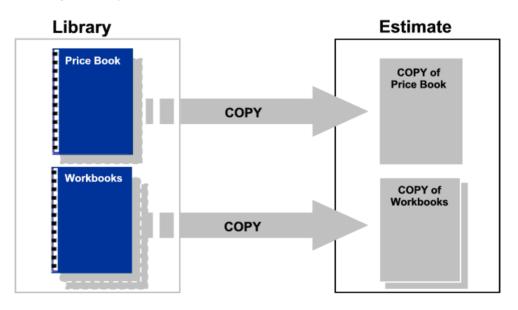
EstimatorXpress® Plumbing & Heating Trade edition is suitable for installers who wish to quickly and easily price up plumbing & heating work. And with a selection of ready prepared 'estimating calculators' including heating systems, kitchens, bathrooms, waste connections, gas and water pipes, you will find it so easy to use you'll wonder how you managed without it. (If you are a small building business and property developer, why not consider EstimatorXpress® Total Toolkit edition which can handle extensions, new builds, renovations and conversions.)

#### **ESTIMATING SYSTEM**

In EstimatorXpress® you will find all the components you need to quickly and accurately cost your projects. These components include:

- Price Book (containing a list of resources and rates)
- Workbooks (these are the estimating templates where the detailed calculations are undertaken)

Each of these components is stored in Libraries within your EstimatorXpress® software. It is important to be aware that each time you set up a new estimate, EstimatorXpress® automatically makes a COPY of each of the above Library components (Price Book and Workbooks) and places the COPY in the estimate to create a Job Price Book and Job Workbooks. Once you have created your estimate, any changes that you make in the Job Price Book or Workbooks will NOT affect or damage the Library items.



#### The Master Price Book

EstimatorXpress® Plumbing & Heating Trade edition is provided 'out of the box' with a comprehensive Master Price Book of 1000+ resources. The Price Book is the heart of EstimatorXpress® where all the resource rates are contained. The Price Book is split into 5 sections:

- Materials
- Labour
- Plant
- Subcontract
- Sundry

To ensure your estimates are always accurate and up-to-date, the material rates within the **Price Book** are linked via **Price Tracker™** technology with an on-line catalogue of 1000+ product prices. These prices are updated for you by HBXL so that you can simply download any changes in order to keep your **Price Book** up to date. For easy identification, the **Purchase Price** of the web-based items is in bold type within the **Price Book**. In order to access the online **Price Tracker™** service, you must have a valid subscription to **HBXL Support & Updates**. [To download latest prices into your **Price Book** see page 23.]

You can of course manually add your own resources to the **Price Book** to tailor it to your exact needs and modify the rates at any time to ensure they reflect your local conditions. These items are not linked to the **HBXL** website and therefore their prices must be checked and maintained manually.

You can also create your own (secondary) **Price Books** which are saved for future use in the **Library of Price Books**. Note that unlike the **Master Price Book**, these secondary **Price Books** will not be directly plugged into the **EstimatorXpress® Price Tracker™** updates or any on-line merchant catalogues. However, it is possible to synchronise secondary **Price Books** with the **Master Price Book** if you wish.

[In addition you may also be able to open **HBXL Trade Accounts** with our Merchant Partners which will give you access to merchant catalogues on-line @ hbxl.co.uk and the ability to download thousands of new products into your software. Please note that a fee may be payable. See page 8 for more information]



Summary	Price Book	Chart	Reports	Address	Profit	Ir
My Jobs 🔪 Job S	ummary \ Price B	ook				-
rtalizza e secolo				Th	e prices quo	ted to you
Editing Mode Description				🗾 Lis	st Price 🔽 Di	iscount 🔽
Baxi Duo-tec 24HE Co	mbi Boiler			£	1,105.00	0.00%
Baxi Duo-tec 28HE Co	mbi Boiler			£	1,285.00	0.00%
Baxi Duo-tec 33HE Co	mbi Boiler			£	1,425.00	0.00%
Baxi Duo-tec 40HE Co	mbi Boiler			£	1,511.00	0.00%
BAXI Duo-tec Combi 2	4HE Boiler Only	511	8060	£	1,118.84	0.00%
BAXI Duo-tec Combi 2	8HE Boiler Only	511	8646	£	1,295.49	0.00%

#### The Workbooks

EstimatorXpress® carries out the estimating in templates or 'Workbooks' as we call them. Workbooks are used to cost the different elements of the plumbing & heating installation process, i.e. Boilers, Pipe work, Radiator installation, Underfloor Heating, Waste connections and so on. An estimate will therefore normally be made up of multiple Workbooks unless you specialise in certain areas of construction.

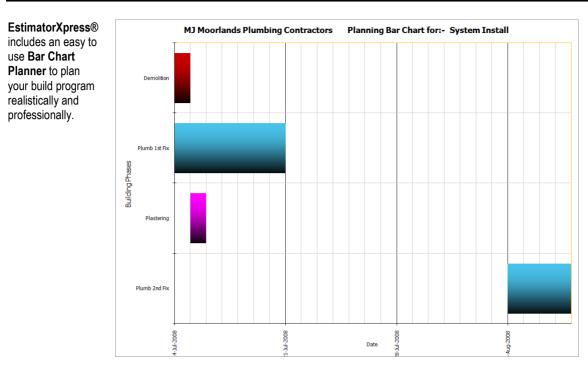
Close Open Workbook W	Add Delete orkbook Workbook		mport PlansXpres Drawing	s Order Workbooks
Summary	Price Book	Chart	Reports	Address
My Jobs \ Job Su	nmary			
Workbook Name		Remarks .	Total Cost	Comments
Boiler Glow-Worm Comb Gas Pipe Install Horizonl Gas Pipe Install Vertical Copper Pipe End Feed 1 Plastic Pipe ISmm Fixing Radiator Tails 10mm Coy Radiator Tails 10mm Coy Radiator Tails 10mm Coy Naste Pipe Fixings Waste Pipe Install 40mm Outside Tap Pipe Install Vertical Copy Radiator Tails 15mm Coy Chasing Walls P+ Double Panel Radiats Pipe Install Vertical Plast Shower Price Tracker Mi Soil Pipe Waste Pipe Install 32mm Bath Stendard Sanitaryware Price Trac Bathroom Taps Standar Pipe Install Vertical Copy Plastic Pipe Izmm Fixing *	al Copper End Feed Copper End Feed Smm Fixings s par Microbore stic Microbore over Solder Ring oper or 600 Deep astic ic xer a ker Range d ser End Feed		€ 1,467.85 € 112.36 E 18.73 £ 15.59 € 207.07 € 75.26 € 19.47 € 335.67 € 17.58 € 770.95 € 365.84 € 63.01 € 188.55 € 489.64 € 262.68 € 330.07 € 100.73 € 204.62	
No of Items 25		Sub Tota (ex VAT & Profit	,	
Remarks				

Simply enter your dimensions/quantities into your chosen **Workbooks** and **EstimatorXpress**® will calculate all of the **Materials**, **Labour**, **Plant**, **Subcontract** and **Sundry** resources with associated costs.

EstimatorXpress® Plumbing & Heating Trade edition comes with over 100 standard Workbooks. These Workbooks are stored in the Library of Workbooks.

You can also create your own **Workbooks** if you find certain works you undertake do not appear within the **Library of Workbooks**. You can do this in two ways. 1) By copying and modifying an existing **Workbook** to create your own bespoke **Workbook** or 2) By creating a completely new **Workbook** by using a composite, area, volume or perimeter or 3) by using the **EstimatorXpress® PowerPack**\*.

\* EstimatorXpress® PowerPack is an optional extra software module for experienced EstimatorXpress® users available for purchase from HBXL. Please call 0845 1234 065 for more details.



**BAR CHART PLANNER** 

The fully interactive and modifiable chart displays the tasks to be performed throughout your build. Each **Build Phase** (or bar on the chart) is linked to resources in your estimate e.g. the Plumb 1<sup>st</sup> Fix bar on the chart is linked to all the **Materials**, **Labour**, **Plant**, **Subcontract** and **Sundry** involved with the construction of the plumbing 1<sup>st</sup> fix.

Depending on the scale of your project you may want to view your chart on a week-by-week or day-by-day basis.

Several charts are included in the **Library of Bar Charts** as standard with the system. You can modify any **Bar Chart** to suit your own project(s). Alternatively you can create your own bespoke charts in minutes by copying and modifying a 'standard' chart to create a new chart, e.g. Refurbishment, and save it to the **Library of Bar Charts** for future use.

You can update your **Job Bar Chart** at any time to reflect changes to your build program e.g. delays with delivery. It is also possible to add new bars to the chart specific to your project (if they don't already exist). You can print out your chart in full colour or black and white. These print outs will give you a professional edge when meeting customers and financial lenders. You'll also find them invaluable for on-site management.

#### **REPORT MANAGER**

With your Estimate and Bar Chart complete, EstimatorXpress® Plumbing & Heating Trade edition produces a variety of detailed and professional reports and charts, which you can print out from the Report Manager. Reports that can be printed include:

- Costs (with or without VAT)
- Costs (with or without wastage)
- Breakdown of Costs by Build Phase Pie Chart
- Sales Price including Profit
- Profit Forecast
- Breakdown of Profit by Build Phase Pie Chart
- Customer Quote
- Cash Flow
- Sales Price Cash Flow Chart
- Labour Time Schedules
- Plant Task List
- Material Schedule
- Inflated Costs
- PLUS many more!

It is possible to produce a virtually unlimited number of **Reports** by filtering and sorting the estimate data from within the **Report Manager**. Data is fully exportable to Microsoft® Excel.

### PLEASE NOTE: Depending on the edition of EstimatorXpress® you are using, there will be a different number of Reports available to you.

	)ate required 📃 💌	Description	<ul> <li>Purch Cost (£) Purchase Units</li> </ul>	Quantity required	Wastage	Order Quantity	Item Costs	Wastage Costs	Total Costs
19/05/2008	14/07/2008	Plastic Pipe Conduit 15mm x 25M	21 EA	1.40	0.11	1.51	£29.40	£2.21	£31.61
		Plastic Pipe Conduit 22mm x 25M	26 EA	0.30	0.02	0.32	£7.80	£0.59	£8.39
02/06/2008	14/07/2008	Glow-Worm Flexicom 30cx Combi Boiler	1044 EA	1.00		1.08	£1,044.00	£78.30	£1,122.30
		Silicone Lubricant 125gm	13 EA	1.00	0.08	1.08	£13.00	£0.98	£13.98
09/06/2008	04/08/2008	Plastic Radiator Draincock 15mm	5.4 EA	1.00	0.08	1.08	£5.40	£0.41	£5.81
16/06/2008	14/07/2008	Plastic Straight Connector 15mm	1.4 EA	1.52	0.11	1.63	£2.13	£0.16	£2.29
23/06/2008	04/08/2008	Basin Taps Pair (Allowance £12)	12 PR	1.00	0.08	1.08	£12.00	£0.90	£12.90
		Bath Taps Pair (Allowance £14)	14 EA	1.00	0.08	1.08	£14.00	£1.05	£15.05
		Brass Basin Waste with Plug and Chain	5 EA	1.00	0.08	1.08	£5.00	£0.38	£5.38
		Brass Bath Waste with Plug and Chain	12 EA	1.00	0.08	1.08	£12.00	£0.90	£12.90
		Chrome isolating Ball Valve Copper x Copper 22mm	3.9 EA	2.00	0.15	2.15		£0.59	£8.3
		Chrome Shower Mixer	120 Each	1.00	0.08	1.08	£120.00	£9.00	£129.00
		Close Coupled Pan and Cistern (Allowance £100)	100 PR	1.00	0.08	1.08	£100.00	£7.50	£107.50
		Hand Basin including Pedestal (Allowance £40)	40 PR	1.00	0.08	1.08	£40.00	£3.00	£43.00
30/06/2008	14/07/2008	Air Admittance Valve 110mm	81 EA	1.00	0.08	1.08	£81.00	£6.08	£87.08
		Chrome Isolating Ball Valve Copper x Copper 15mm	1.2 EA	1.00	0.08	1.08	£1.20	£0.09	£1.29
		Clip Over Pipe Clip 15mm	0.2 EA	10.50	0.79	11.29	£2.10	£0.16	£2.26
		Clip Over Pipe Clip 22mm	0.3 EA	6.00	0.45	6.45	£1.80	£0.14	£1.94
		Copper End Feed Elbow 15mm	0.3 EA	5.00	0.38	5.38	£1.50	£0.11	£1.61
		Copper End Feed Equal Tee 15mm	0.4 EA	1.00	0.08	1.08	£0.40	£0.03	£0.43
		Copper End Feed Stop End 15mm	1.1 EA	1.00	0.08	1.08	£1.10	£0.08	£1.18
		Copper End Feed Straight Coupler 15mm	0.2 EA	3.50	0.26	3.76		£0.05	£0.7
		Copper End Feed Straight Coupler 22mm	0.4 EA	2.00	0.15	2.15	£0.80	£0.06	£0.86
		Copper Pipe Clip 28mm	26 HD	0.04	0.00	0.04	£1.04	£0.08	£1.1
		Copper Tube EN1057 15mm x 3M	564 HM	0.11	0.01	0.11	£59.22	£4.44	£63.6
		Copper Tube EN1057 22mm x 3M	1128 HM	0.06	0.00	0.06	£67.68	£5.08	£72.76
		Glow-Worm Standard Flue Kit	89 EA	1.00	0.08	1.08	£89.00	£6.68	£95.68
		Plastic Barrier Pipe Conduit 28mm x 25M	158 EA	0.16	0.01	0.17		£1.90	£27.18
		Plastic Bend 135deg 15mm	1.8 EA	4.00	0.30	4.30	£7.20	£0.54	£7.74
		Plastic Double Check Valve 15mm x 15mm	10 EA	2.00	0.15	2.15	£20.00	£1.50	£21.50
		Plastic Elbow 15mm	1.7 EA	40.00	3.00	43.00	£68.00	£5.10	£73.1
		Plastic Elbow 22mm	2.5 EA	25.00	1.88	26.88	£62.50	£4.69	£67.19
		Plastic Equal Tee 15mm	2.4 EA	8.00	0.60	8.60	£19.20	£1.44	£20.64
		Plastic Equal Tee 22mm	3.1 EA	1.00	0.08	1.08	£3.10	£0.23	£3.3
		Plastic Gate Valve 15mm x 15mm	5.4 EA	2.00	0.15	2.15	£10.80	£0.81	£11.6
		Plastic Pipe 15mm x 25M	28 EA	3.20	0.24	3.44	£89.60	£6.72	£96.32
		Plastic Pipe 22mm x 25M	55 EA	0.72	0.05	0.77	£39.60	£2.97	£42.57
		Plastic Pipe Clip Screw 15mm	9 PK	2.53	0.19	2.72	£22.80	£1.71	£24.5
		Plastic Pipe Clip Screw 22mm	9 PK	0.70	0.05	0.75	£6.30	£0.47	£6.7
		Plastic Straight Connector 22mm	1.9 EA	0.42	0.03	0.45	£0.80	£0.06	£0.8
		Plastic Straight Tap Connector 22mm x 3/4 inch	2.8 EA	2.00	0.15	2.15	£5.60	£0.42	£6.0
		Plastic Wallplate Elbow 22mm x 3/4 inch	5.8 EA	4.00	0.30	4.30	£23.20	£1.74	£24.9
		Plastic Wallplate Elbow 15mm	4.4 EA	4.00	0.30	4.30	£17.60	£1.32	£18.9

#### WORKBOOKS SUPPLIED WITH ESTIMATORXPRESS® PLUMBING & HEATING TRADE EDITION

Below is a list of the **Workbooks** supplied with **EstimatorXpress® Plumbing & Heating Trade edition**. You can modify and save each **Workbook** to suit your way of working or create your own **Workbooks** based on the **Composite**, **Area**, **Volume** and **Perimeter Workbooks**.

Area

**Basic Plaster Patching** Bath Bow Fronted Bath Corner Bath Deep Fill Bath Double Ended Bath Freestanding Bath Standard Bath Virgo Solus Bath Whirlpool Bathroom Taps Bologna\* Bathroom Taps Contract\* Bathroom Taps High Spec Bathroom Taps Lever\* Bathroom Taps Lucca\* Bathroom Taps Non Concussive\* Bathroom Taps Sienna\* Bathroom Taps Standard Bathroom Taps Verona\* Bathroom Taps X Head\* Boiler Baxi Combi Boiler Baxi System Boiler Expansion Tank Boiler Glow-Worm Combi Boiler Glow-Worm System Boiler Ideal Combi Boiler Ideal System **Boiler Potterton Combi Boiler Potterton System** Boiler Saunier Combi **Boiler Saunier System** Boiler Vaillant Combi Boiler Vaillant System Boiler Vokera Combi Boiler Vokera System Boiler Warmflow Combi Oil Boiler Warmflow System Oil Boiler Worcester Combi Boiler Worcester Combi Oil Boiler Worcester System Boiler Worcester System Oil Ceramic Wall Tiling Chasing Walls Commissioning Water System Composite Items Composite Items 1 Composite Items 2 Composite Items 3

Copper Pipe Compression 10mm Fixings **Copper Pipe Compression 15mm Fixings** Copper Pipe Compression 22mm Fixings Copper Pipe Compression 28mm Fixings Copper Pipe Compression 8mm Fixings Copper Pipe End Feed 15mm Fixings Copper Pipe End Feed 22mm Fixings Copper Pipe End Feed 28mm Fixings Copper Pipe End Feed 8mm and 10mm Fixings Copper Pipe Manifolds and Micrafolds Copper Pipe Solder Ring 15mm Fixings Copper Pipe Solder Ring 22mm Fixings Copper Pipe Solder Ring 28mm Fixings Copper Pipe Solder Ring 8mm and 10mm Fixings Floorboard Lifting for Installations Gas Connections Gas Fire Gas Pipe Install Horizontal Copper End Feed Gas Pipe Install Horizontal Copper Solder Ring Gas Pipe Install Vertical Copper End Feed Gas Pipe Install Vertical Copper Solder Ring Hacking Plaster from Walls Heating System Components Hot Water Cylinder K1 Single Panel Radiator 300 Deep K1 Single Panel Radiator 400 Deep K1 Single Panel Radiator 500 Deep K1 Single Panel Radiator 600 Deep K1 Single Panel Radiator 700 Deep K2 Double Panel Radiator 300 Deep K2 Double Panel Radiator 400 Deep K2 Double Panel Radiator 500 Deep K2 Double Panel Radiator 600 Deep K2 Double Panel Radiator 700 Deep Kitchen Taps Contract\* Kitchen Taps Cortona\* Kitchen Taps Genoa\* Kitchen Taps High Spec Kitchen Taps Lever\* Kitchen Taps Standard Kitchen Taps Volterra\* Kitchen Taps X Head\* Outside Tap P+ Double Panel Radiator 400 Deep P+ Double Panel Radiator 600 Deep Perimeter Pipe Install Horizontal Copper End Feed Pipe Install Horizontal Copper Solder Ring Condensate Soakaway for Boiler

Pipe Install Horizontal Plastic Pipe Install Vertical Copper End Feed Pipe Install Vertical Copper Solder Ring Pipe Install Vertical Plastic Plastic Pipe 10mm Fixings Plastic Pipe 15mm Fixings Plastic Pipe 22mm Fixings Plastic Pipe 28mm Fixings Plumbing Consumables Radiator Tails 10mm Copper Microbore Radiator Tails 10mm Plastic Microbore Radiator Tails 15mm Copper Radiator Tails 15mm Plastic Microbore Radiator Tails 8mm Copper Microbore Sanitaryware Ascot Range\* Sanitaryware Cheltenham Range\* Sanitaryware Chichester Range\* Sanitaryware Cube Range\* Sanitaryware Onyx Range\* Sanitaryware Oxford Range\* Sanitaryware Pricetracker Range Sanitaryware Pride Range\* Sanitaryware Zone Range\* Shower Electric Shower Enclosure Curved Shower Enclosure Rectangular Shower Enclosure Square Shower Enclosure WalkIn Shower Mixer\* Shower Pricetracker Mixer \*\* Shower Pump Shower Screen Showerbath Soil Pipe Subcontract Quotations Towel Rail Curved Towel Rail Curved With Heater Towel Rail Straight Towel Rail Straight With Heater **Towel Rail Traditional** Underfloor Heating in Floating Floor Underfloor Heating in Joists Underfloor Heating in Screed Volume Waste Kitchen Waste Pipe Fixings Waste Pipe Install 32mm Waste Pipe Install 40mm Water Tank Loft

\* Workbooks only available with a Jewson or Grahams Trade Account link

#### UNDERSTANDING THE DIFFERENT TYPES OF WORKBOOKS

The **Workbooks** supplied as standard with **EstimatorXpress® Plumbing & Heating Trade edition**, can be categorised as one of three types. Each of these **Workbooks** works in a slightly different way to automate and create as much flexibility within the system as possible. It is recommended that you study the different types of **Workbook** to understand their different structures and how they fit together within the program.

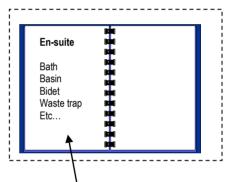
#### THE COMPOSITE ITEMS WORKBOOKS

**Composite Items Workbooks** deal with the highly variable elements of a job and are simply a list of resources that go to make up the cost of any random selection of resources. Examples of **Composite Items Workbooks** include Boilers, Pipe Installation and Radiators. In general you will use a **Composite Items Workbook** when there is a group of resources that form a collection that you will quantify all together i.e. a Basin will have resources of: Basin, pedestal, basin waste, bottle trap, waste pipe, screws to secure pedestal, silicone sealant & the labour to fit the items. In the main you will pick this group of resources as a whole rather than choosing them individually.

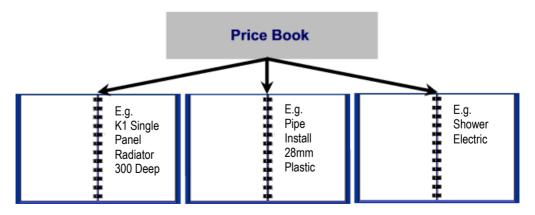
Based on a **Composite Items Workbook** you could create your own **Composite Item Workbook** for the cost of fitting out a luxury en-suite bathroom comprising for example:

- Bath
- Basin
- Bidet
- Waste Connections
- Labour Costs...

NOTE: The **Composite Items Workbook** is not dependent on the inputting of dimensions but entering quantities. **Materials** and other resources contained in a **Composite Items Workbook**, are by their nature completely "free form".



Ensuite Bathroom Worksheet in Luxury Bathroom Workbook



Note that the Composite Items Workbooks are a selection of resources chosen from the Price Book

#### WORKBOOKS WITH A DIMENSION/QUANTITY ENTRY SECTION

The Workbooks with a dimension/quantity entry section are linked to a range of calculators provided within EstimatorXpress® Plumbing & Heating Trade edition, and provide a variety of complex calculations for items such as underfloor heating.

The other **Workbooks** in this category consist of a list of similar items that require quantifying individually i.e. a **Plastic Pipe 22mm Fixings Workbook** has 18 different fixings of that size that you can quantify as required.

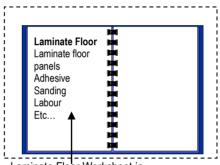
#### THE AREA, PERIMETER AND VOLUME WORKBOOKS

The template **Area**, **Perimeter** and **Volume Workbooks** are provided so that the user can easily create their own calculators based on area, length and volume. They are linked to a calculation tool provided with **EstimatorXpress**®, which works out the area, length and volume of different shapes and multiplies the unit costs by the calculated areas.

Based on an **Area Workbook** you could create your own **Workbook** for costing a bathroom laminate floor comprising:

- Laminate Floor
- Adhesive
- Sanding
- Labour

In this way, you can quickly build up your own Library of Workbooks for the specific Jobs you encounter.



Laminate Floor Worksheet in Laminate Floor Workbook

# **PRINCIPLES OF ESTIMATING**

For a full discussion of estimating techniques, you would need to study an entire book! However, for the purposes of this Tutorial we will take only a couple of pages to discuss the basic principles.

- It is important that you understand the concept of Production / Usage Factors as they are at the heart of EstimatorXpress®.
- When estimating any build costs, you need to break down the various elements of the build into measurements of length, area, volume or simply a list of components such as doors, lintels, and furniture...

#### Example: Estimating the Cost of Floor Joists

Consider the situation where you are estimating the cost of supplying and fixing floor joists. Clearly, you are interested in the number of metres used and the unit cost of fixing that joist.

Assume that you have a joist, 3.6 metres long. The cost of supplying and fixing the joist would be dependent on the size of the joist.



The size of the joist is normally defined in the **Specification**. The raw material **Purchase Cost** of the joists will be looked up from your **Price Book**.

In this example, the joists are purchased at £200.00 per hundred metres. To convert the **Purchase Cost** to the **Estimate Rate,** i.e. how much it costs per metre run, we need to apply the **Production / Usage Factor** of 1/100 = **0.01** to convert from hundreds of metres to metres thus:

Estimate Rate for Joists	=£200.00 x 0.01	=£2.00 per metre
The cost of the material	=3.6m x £2.00	=£7.20 each

To calculate the cost of labour to fix the joist is a similar process in that the labour **Purchase Cost** for a joiner might be, say,  $\pounds 12.00$  per hour. However it might only take the joiner 5 minutes to fix each metre of joists, i.e. 5 minutes/ 60 minutes = **0.0833** of an hour per metre.

This rate of production is again described in EstimatorXpress® as the Production / Usage Factor.

The Estimate Rate for fixing the joists	=£12.00 x 0.0833	=£1.00 per metre
The cost of fixing each joist	=3.6m x £1	=£3.60 each

Accordingly the total cost for supplying and fixing the 3.6 m long joist will be, ignoring any wastage of Material or time,

£7.20 + £3.60 = £10.80 each.

(EstimatorXpress® contains various templates, which will calculate the lengths and quantities of joists required and apply the unit costs and Production / Usage Factor appropriately.)

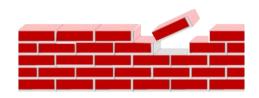
#### Example: Estimating the Cost of A Brick Wall

Let's now consider something a little more complicated, say, a single  $\frac{1}{2}$  brick wall.

Let's assume we have a wall, 3 metres long by 2 metres high.

Clearly the area of this wall will be:

Area of Wall  $=3m \times 2m = 6 m^2$ 



The type of brick will normally be looked up from the **Specification** and its associated **Purchase Cost** from the **Price Book**.

The number of bricks per square metre of wall is normally around 60 to the square metre. In this example, assume a cost of £0.25 per brick. To convert the **Purchase Cost** to the **Estimate Rate**, i.e. how much it costs per m<sup>2</sup>, we need to apply the **Production / Usage Factor** of **60** to convert single bricks to m<sup>2</sup>.

Estimate Rate for bricks	=£0.25 x 60	=£15.00 per m <sup>2</sup>
The cost of the material	=6m <sup>2</sup> x £15.00	=£90 total cost

(Again, wastage has been ignored)

Let's have a close look at pricing up the labour for our brick wall. The simplest way to tackle this is to pay the bricklayer per brick, or per thousand bricks. For example if the bricklayers are being paid, say, £300 per thousand bricks, then the **Production / Usage Factor** per square metre would be:

Production / Usage Factor =60/1000 =0.06

Accordingly the labour cost for the wall would be:

Estimate Rate for laying the bricks	=£300 x 0.06	=£18.00 per m <sup>2</sup>
The cost of laving the bricks	=6 m <sup>2</sup> x £18.00	=£108 total cost

The total cost of the wall, excluding wastage (and mortar!) would be

 $\pounds90 + \pounds108 = \pounds198.00$ 

(EstimatorXpress® contains various templates, which will calculate the area of bricks required and apply the unit costs and Production / Usage Factor appropriately.)

NOTE: In **EstimatorXpress**® we always relate **Estimate Rates** to hourly rates for consistency and to avoid having to enter multiple rates for any particular trade. For example let's assume the bricklaying gang is costing £30.00 per hour. Also, assume that we are targeting an **Estimate Rate** of £18.00 per square metre, in these circumstances:

Estimate Rate for laying the bricks=£30 x 0.6 (Production / Usage Factor)=£18.00 per m<sup>2</sup>

The cost of laying the bricks =6m<sup>2</sup> x £18.00 =£108 total cost

EstimatorXpress® Plumbing & Heating Trade Edition Tutorial

# **PLUMBING & HEATING TUTORIAL**

This chapter is designed as a "hands-on" Tutorial for people with no experience of using **EstimatorXpress**® for Excel 2010. Older versions of office may look slightly different, but the process is largely the same. It assumes you are an absolute beginner, and gives you explanations and step-by-step guides to:

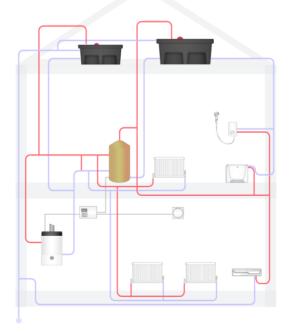
- Downloading the latest Material prices from hbxl.co.uk
- Estimating with EstimatorXpress®
- Producing Bar Charts
- Producing Reports
- Producing Customer Quotations

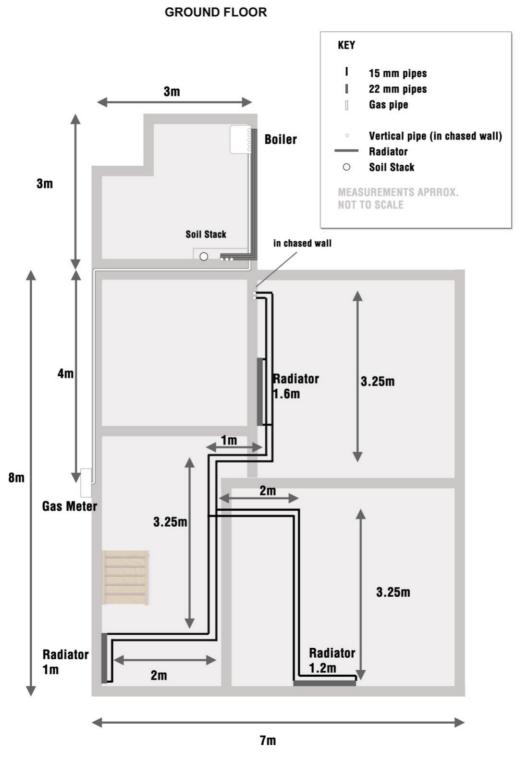
This tutorial takes you through estimating the installation a heating system and a new bathroom to an existing house with an extension being built (see diagrams on page 20) and demonstrates the basic procedures of **EstimatorXpress**<sup>®</sup>. We will only concern ourselves with the hot water feed from the boiler to the bathroom. Once you have completed the tutorial you will be able to add the cold water feed as an exercise.

The time required to complete each section is indicated in minutes at the introduction. The whole Tutorial should take approximately  $1\frac{1}{2}$  hours to complete.

When working through the Tutorial you are strongly advised that once you start a particular section, you continue it until it is complete. At the end of each section, you will be shown how to exit **EstimatorXpress**<sup>®</sup>, should you wish to.

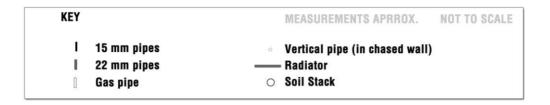
The following 2 pages have some basic plans with a layout of the house and extension showing the work to be carried out that you will be estimating throughout this Tutorial. You will need to refer back to these drawings. All dimensions on the plan are given in metres where quoted.

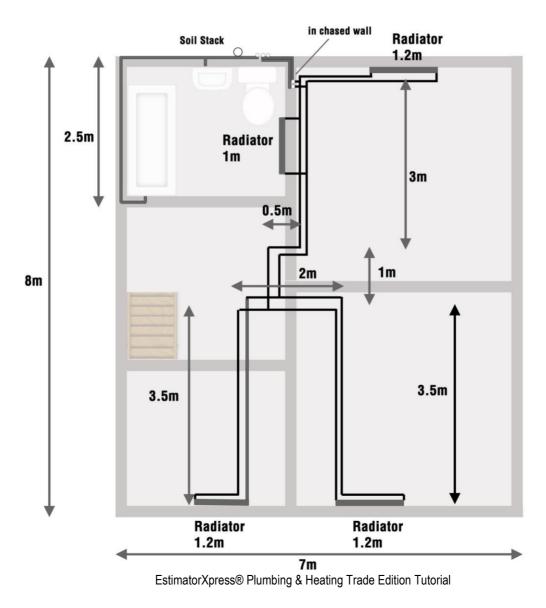




EstimatorXpress® Plumbing & Heating Trade Edition Tutorial

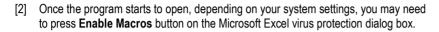
#### FIRST FLOOR





# LAUNCHING ESTIMATORXPRESS® & THE MAIN MENU

[1] To launch EstimatorXpress® either double-click on the EstimatorXpress® icon on your desktop or select EstimatorXpress® from the Start, Programs Menu.



Once you have launched EstimatorXpress®, the Main Menu will appear (see screen shot below).

My Estimates opens the estimating module of EstimatorXpress®.

Download Prices allows you to download the latest price updates from www.HBXL.co.uk Website. If you have an HBXL Merchant Trade Account you may also be able to download your personal discounts to your Price Book. Please see page 8 for more information.

My Settings opens the My Settings menu which provides access to all of the Libraries of information which underpin the Estimates. From here you can view and edit Price Books, Workbooks, Groups of Workbooks, Bar Charts, Reports, Profit Margins, Inflation Rates and My Favourites.





**Help** allows you to access the Help System. This provides detailed 'How do I' questions and answers together with additional information about each screen. **EstimatorXpress**® Help can be accessed from most screens by clicking the Help button or by pressing the F1 key on your keyboard.

My Projects transfers you to the My Projects screen. Projects are groups of Jobs linked together to form a project. You will not need this button to complete the Tutorial. This feature is only available with EstimatorXpress® Total Toolkit edition.

TIP: If the **Main Menu** does not appear please see page 8 for details about setting you macro security levels.

## SETTING UP ESTIMATORXPRESS®

Before creating an Estimate, we are going to introduce you to the Price Book.

#### DOWNLOADING LATEST MATERIAL RATES INTO ESTIMATORXPRESS®



This exercise will lead you through downloading latest prices from our on-line catalogue, which is the key to accurate estimating. These generic prices are kept up to date using HBXL **Price Tracker**<sup>™</sup> technology.</sup>

NOTE: You must have a valid subscription to HBXL Support & Updates in order to maintain your Price Book by downloading latest prices using Price Tracker<sup>™</sup>. You may also be able to download products from our Merchant Partners' catalogues if you have a Trade Account and have subscribed for this additional service. Please see page 8 for more details.



[1] Having launched EstimatorXpress® the Main Menu screen will appear.

Click on Download Prices button.

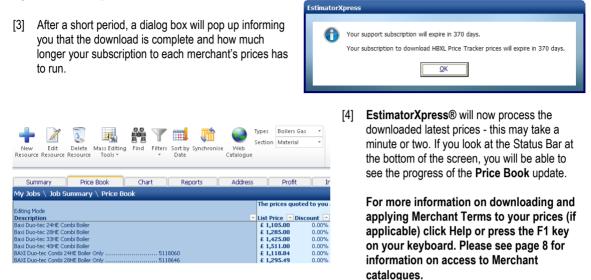
[2] You will now see a list of all of the Materials supplied as standard with EstimatorXpress®. If you are not logged onto the internet a dialog box automatically pops up asking to notify you that you need to be connected in order to download prices.

File EstimatorXpress Toolkit Tools/Options	EstimatorXpress
Close New Edit Delete Mass Editing Downloa Resource Resource Resource Tools + Prices	
Library of Price Books \ Master Price Book	
Editing Mode Description Grey Limestone Chippings Small Bag	The prices quoted to you are indicative, may be subject         • List Price       • Discount       • Adjustment       • Unit of Supply         £       5.70       0.00%       0.00% EA
Bath Grip Pack Universal Bath Panel 1500mm Bath Panel 1700mm Bath Panel 1800mm	0.00% EA 0.00% EA 0.00% EA
Bath Panel 700mm Bath Panel 800mm Bath Ungripped 2TH 1500mm x 700	irrently logged on to the internet? 0.00% EA 0.00% EA 0.00% EA
Bath Ungripped 2TH 1700mm x 700 Bow Fronted Bath 2TH 1700mm x 7 Bow Fronted Bath Panel 1700mm Bow Fronted Bath Panel 750mm	<u>№</u> 0 0.00% EA 0.00% EA 0.00% EA
Close Coupled Pan and Cistern (Allowance £100) Close Coupled Pan and Cistern (Allowance £250) Contemporary Freestanding Bath 1750mm x 790mm	£         100.00         0.00%         0.00%         EA           £         250.00         0.00%         0.00%         EA           £         505.00         0.00%         0.00%         EA
Contemporary Freestanding Bath Feet Deep Fill Bath 2TH 1700mm x 750mm	£         131.00         0.00%         0.00% EA           £         210.00         0.00%         0.00% EA

EstimatorXpress® Plumbing & Heating Trade Edition Tutorial

N.B. With some web browsers, you will have to launch your Internet browser (Microsoft® Internet Explorer, Netscape Navigator...) and connect to the Internet manually. We therefore recommend that you do this before you click **Yes**.

If you click **No**, the procedure will be cancelled.



[5] Your **Price Book** now contains the latest price information and **EstimatorXpress**® will automatically filter your **Price Book** to show any items that have been added or whose prices have changed.



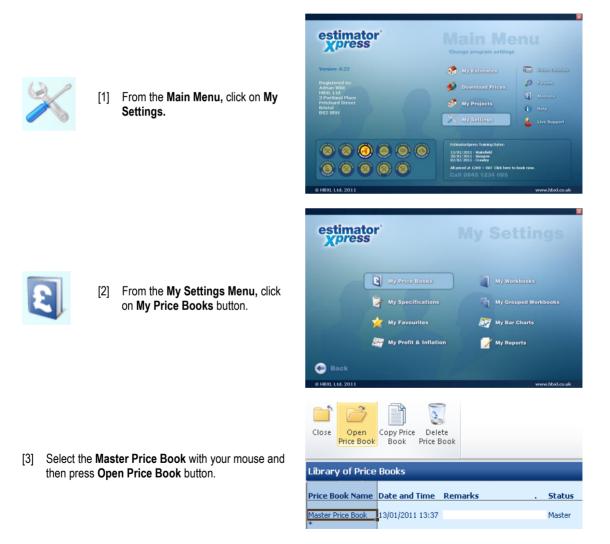
To close the Master Price Book press Close button, you are returned to the Main Menu.

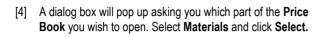
5.00 Minutes

#### SELECTING NEW MATERIALS FROM THE HBXL WEBSITE

This exercise will lead you through selecting additional products from the Merchant Catalogue(s) on www.hbxl.co.uk to download into your **Master Price Book**. If you do not want to select additional products at this time, go to page 28 to create a new product in your **Price Book**.

NOTE: To select additional materials from www.hbxl.co.uk, you must have a valid subscription to HBXL Support & Updates and a valid subscription to access the prices of one of our Merchant Partners. See page 8 for more information.









[5] To select new Materials from www.hbxl.co.uk in order to download them into your **Master Price Book**, click on the **Web Catalogue** button.

[6] If you are not logged onto the internet a dialog box automatically pops up to notify you that you need to be connected in order to search the web catalogue.

Es	timatorX	press	
	?	Are you currently logged on to the internet?	
		Yes <u>N</u> o	

If you click No, the procedure will be cancelled.

[7] You will now be automatically transferred to www.hbxl.co.uk where you should simply follow the on screen instructions. This involves searching by keyword or navigating through the catalogue by category, then selecting the items from the search results using the product(s) tick-box and confirming your selection at the bottom of the page.

**EstimatorXpress**®'s website www.hbxl.co.uk will now store the items you have selected until you are ready to download them into your PC during your next price download. You can now close you web browser and return to **EstimatorXpress**®.



[8] To download your newly selected products to the Master Price Book of your EstimatorXpress® software, click the Download Prices button from inside the Master Price Book or press the Download Prices button from the Main Menu.

[9] A dialog box pops up asking you if you are currently logged on to the Internet.

E	stimatorX	press
	?	Are you currently logged on to the internet?
		<u>Y</u> es <u>N</u> o

Click Yes.

- [10] EstimatorXpress® will now download the products to your computer.
- [11] Your **Price Book** now contains the item(s) you selected and **EstimatorXpress**® will automatically filter your **Price Book** to show any items that have been added.

EstimatorXpress® Plumbing & Heating Trade Edition Tutorial

From now on, each time you download prices from www.hbxl.co.uk, the prices for these products will be refreshed.

For more information on updating the prices of web-linked resources, click Help or press the F1 key on your keyboard. This service is only available with a valid HBXL Support & Updates subscription and a Trade Account with one of our Merchant Partners. An additional fee may be payable. Please contact HBXL for more details Tel. 0845 1234 085.

1.	To close the <b>Master Price Book</b> press the <b>Close</b> button, you are transferred to the <b>Library of Price Books</b> .	Close
2.	Press the Close button again to return to the My Settings Menu	Close
3.	In the My Settings Menu, press the Back button to return to the Main Menu.	🕞 Back

#### IMPORTANT REMINDER:

Now you have ensured that the Materials rates are up to date in the Materials section of your Price Book, you should also visit the Labour, Plant, Subcontract and Sundry sections to ensure that their rates reflect your local conditions.

By ensuring the Library Price Book is up to date, all estimates created in the future will contain your accurate prices.

#### **CREATING A NEW PRODUCT IN YOUR PRICE BOOK**



My Workbooks

💯 My Bar Charts

📝 My Reports

Status

This exercise will lead you through manually creating a new product to add to your EstimatorXpress® Price Book.



[1] From the **Main Menu**, click on **My Settings**.



estimator xpress

💮 Bac

Close

Price B

Open Price Book

Library of Price Books

My Price Books

My Specification

🧾 My Profit & Inflatio

2

Delete Price Book

Date and Time Remark

👉 My Favourites

Copy Price Book

Sundry



[2] From the My Settings Menu, click on My Price Books button.

- [3] Select the **Master Price Book** with your mouse and then press the **Open Price Book** button.
- [4] A dialog box will pop up asking you which part of the **Price Book** you wish to open. For this example, select **Materials** and click **Select**.

N.B. You can follow the same steps described in this exercise to add new products to the Labour, Plant, Subcontractor and Sundry sections of the **Price Book**.

Master
ook to
elect
ancel

[5] First, select a product similar to the product you wish to create to act as a template for your new product. For example, to add a new bath to your Price Book, click on "Bath Ungripped 2TH 1500mm x 700mm" with your mouse.

TIP: Use the **Find** button or the **Filters** near the top of the screen to help you find items in the **Price Book**.



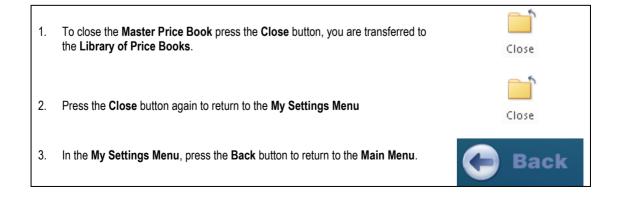


[6] In the toolbar, click the **New Resource** button.

- [7] A dialog box pops up containing information about the product you selected to use as a template for your new product.
- [8] Type over the Description field in the dialog box with the name of your new product, in this case "Standard Bath 2TH with Grips 1500mm x 700mm".
- [9] Enter the Unit Cost and any Discount or Adjustment.
- [10] Select the Unit of Purchase, the Supplier, the product Type.
- NOTE: To add a new Supplier to your Price Book, click on the Add button next to the Supplier/Contractor drop down box.
- [11] Enter Delivery and Payment times.
- [12] Finally, check the VAT and Wastage rates and click OK to save your new product.

This new product will now be available to use in all future Jobs.

Ne	w Resource	
	Description:	Standard Bath 2TH with Grips 1500mm x 700mm
	Code:	4916141301117
	Unit Cost (£):	120
	Discount (%):	0
	Adjustment (%):	0
	Net Purchase Cost:	£120.00
	Units of Purchase:	EA 🔹 🔹
	Supplier/Contractor:	HBXL Price Tracker
	Туре:	Bathroom
	Delivery (Weeks):	2
	Payment (Weeks):	5
	Comments/Code:	
	Last Updated:	13/01/2011
	VAT (%):	17.50%
	Wastage (%):	7.5
		☐ Clear ✓ QK X Cancel
		Tean A The A



## CREATING THE SYSTEM INSTALL & BATHROOM ESTIMATE

Let's start Estimating!



estimator Xpress	Main Menu Start estimating
Version: 0.22 Registered to: Advan Wild HWXL Ltd 3 Porthand Street Britchard Street Britchard Street Britchard Street Str2 JRH	My Estimates     Image: Vector recordshift       Download Prices     Image: Vector recordshift       My Projects     Image: Help       My Settings     Live Support
	EstimatorQuress Training Dates: 13/01/2011 - Wakefield 20/01/2011 - Gargow 02/02/2011 - Gargow Algreed at 12/20 + VAI Click here to book now. Call 04/64 1 22/4 04/5

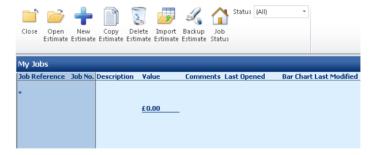


To begin the System Install & Bathroom Demonstration Estimate, press My Estimates button.

[2] EstimatorXpress® transfers you to the My Jobs Screen. This is a list of all the Jobs you have estimated together with their estimated values and details of when they were last edited. If this is the first time that you have used the system no Jobs will be listed.

[1] Having launched EstimatorXpress® the Main

Menu screen will appear.





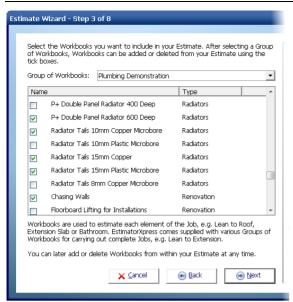
[3] To create a new Estimate, press New Estimate button.

- [4] A dialog box then pops up. Enter a name for your **Job**, for example, enter *Mr Phillips*.
- [5] Next give the Job a brief description from the dropdown menu. If there is nothing suitable from the menu you can type in your own description. (This description simply helps to describe the Job and does not affect the outcome of any calculations.) Click Next.

timate Wizard - Step 1 of 8					
Enter a name for your new Estimate and enter or select a Job Description.					
Job Name: Mr Phillips					
Job Description: System Install					
The Job Name and Job Description appear on the Customer Quote but do not affect the content of the Estimate.					
Import mon Planskpress <sup>21</sup> urawing: (no urawing selected)					
X Cancel Sack Sext					

Estimate Wizard - Step 2 of 8					
Select a Price Book for your Estimate.					
Price Book: Master Price Book					
The Price Book contains details of your Material, Labour, Plant, Su Sundry Resources.	bcontract and				
It is important that your Library Price Book, accessed through My date before starting a new Estimate. EstimatorXpress makes a co Library Price Book to create your new Job Price Book.					
The prices in the Job Price Book will remain fixed until you update	e them.				
	🔿 Next				
X Cancel 💽 Back	Text				

- [6] Now select the Master Price Book from the drop down menu by clicking on the down arrow. (When you purchase EstimatorXpress®, only the Master Price Book exists but you can also create your own.
- [7] When you have selected Master Price Book click Next.



[8] In the next dialog box, you are required to choose a Group of Workbooks or a bespoke set of Workbooks which most closely matches your Job. Workbooks are the estimating calculators of the system. In this case, select Plumbing Demonstration from the drop-down. Note that you can add or delete extra Workbooks to/from a Job by ticking or un-ticking the relevant check boxes in the list below.

The **Plumbing Demonstration** has been pre-prepared to include the main **Workbooks** you will need to estimate in this tutorial. The **Plumbing Demonstration** includes **Workbooks** to cost boilers, radiators, radiator valves, plastic pipes, plastic pipe fixings, gas pipes, copper pipe fixings, mixer showers, soil pipes, waste pipes, waste pipe fixings, plastic pipes, plastic pipe fixings and chasing walls. When you have selected **Plumbing Demonstration** click the **Next** button.



TIP: EstimatorXpress® comes with several Groups of Workbooks that include all the Workbooks that might need to be considered for estimating typical jobs. You can also create your own Groups of Workbooks for the different types of work you carry out by visiting My Grouped Workbooks from inside the My Settings Menu.



For more information about Creating Groups of Workbooks, from the My Settings Menu click on My Groups of Workbooks button and press the Help button or press the F1 Key on your keyboard.

[9]	Next enter a start date for your <b>Job</b> by clicking the
	calendar button and select a Bar Chart type from the
	drop-down box that will be used as a template to plan
	your <b>Job</b> later on.



[10] Click Next.

Enter your Job	Start Date and select a Charl	t Type.	
Start Date:	17/01/2011	31	
Chart Type:	Large Extension	•	
Par Charte are i	sed to help plan the constru	ction of the Joh	
	makes a copy of your select		ate your ne
before starting	your Library Bar Chart to refi a new Estimate. You can ma ut affecting the Library Bar Cl	ke adjustments to your Jol	
	× Cancel	🕞 Back	ด Next

[11] Now enter the Customer's Name and Address Details. These will appear on your printed quotation later should you choose to print one. You can skip this step if you wish by simply clicking Next.

NOTE: You can add or change these details from within the **Job** later on.

[12] Now confirm your target **Profit Margins** for this **Job**. Click **Next** when you are happy with them.

NOTE: You can edit the **Profit Margins** from within the **Job** later on.

stimate Wizar	rd - Step 5 of 8
-	
Enter your	Customer Address Details.
Name:	Mr Phillips
Address 1:	69 Haywards Road
Address 2:	Bristol
Address 3:	
Postcode:	BD49 1XY
Tel:	
The Custor	ner Address Details appear on your Reports and Customer Quote.
This inform	ation can be edited later on from within the Estimate.
	🗙 Cancel 💿 Back 💽 Next
ietimato Wiza	rd - Stop 6 of 0
stimate Wizar	rd - Step 6 of 8
_	
_	rd - Step 6 of 8 ur Profit Margins.
_	
Confirm you	ur Profit Margins.
Confirm you Labour %	ur Profit Margins.
Confirm you Labour % Plant %	ar Profit Margins.
Confirm you Labour % Plant % Material %	ar Profit Margins.
Confirm you Labour % Plant % Material % Subcontrac Sundry % These Profi	ar Profit Margins. 30 30 30 30 10
Confirm you Labour % Plant % Material % Subcontrac Sundry %	ar Profit Margins. 30 30 30 30 30 30 30 30
Confirm you Labour % Plant % Material % Subcontrac Sundry % These Profi Settings.	ar Profit Margins. 30 30 30 30 30 30 30 30
Confirm you Labour % Plant % Material % Subcontrac Sundry % These Profi Settings. You can an	ar Profit Margins. 30 30 30 30 20 20 t Margins are copied from the standard target Profit Margins set up in My
Confirm you Labour % Plant % Material % Subcontrac Sundry % These Profi Settings. You can an	ar Profit Margins.          30         30         30         30         30         30         30         30         30         30         30         30         30         and         and
Confirm you Labour % Plant % Material % Subcontrac Sundry % These Profi Settings. You can an	ar Profit Margins.          30         30         30         30         30         30         30         30         30         30         30         30         30         and         and
Confirm you Labour % Plant % Material % Subcontrac Sundry % These Profi Settings. You can an	ar Profit Margins.          30         30         30         30         30         30         30         30         30         30         30         30         30         and         and
Confirm you Labour % Plant % Material % Subcontrac Sundry % These Profi Settings. You can an	ar Profit Margins.          30         30         30         30         30         30         30         30         30         30         30         30         30         and         and
Confirm you Labour % Plant % Material % Subcontrac Sundry % These Profi Settings. You can an	ar Profit Margins.          30         30         30         30         30         30         30         30         30         30         30         30         30         and         and

#### 34 Tutorial - Creating The Estimate

[13] Now confirm any **Inflation Rates** you would like to apply to the **Job** and then click **Next**.

NOTE: You can edit the **Inflation Rates** from within the **Job** later on.

mate Wizard - SI	tep 7 of 8	
Confirm your Infla	tion Rates and th	e Delay before inflating cost.
Labour %		5
Plant %		5
Material %		5
Subcontractor %		5
Sundry %		5
Delay before inflat	ting cost in weeks	s 13
account the planr each Resource ty;	ned duration of th pe in the Job.	adjust the anticipated building costs to take into ne Job. You can set different Inflation Rates for om the standard anticipated Inflation Rates set up
You can later adju affecting the stan	ust the Inflation R Idard Inflation Rat	lates within your Job at any time without tes.
	×	Çancel € Back € Next
		Çancel 💽 Back 💽 Mext
mate Wizard - St		Çancel 💿 Back 💽 🛞 Next
	tep 8 of 8	
	tep 8 of 8	<u>Cancel</u> <u>⊕</u> <u>Back</u> <u>⊕</u> <u>Next</u> This may take a few seconds.
	tep 8 of 8	

[14] Now click Finish to complete the creation of your Job. EstimatorXpress® will now build your estimate using the information you have entered.

Close Open Workbook	Add Delete Workbook Workboo		Import PlansXpre Drawing	SS Order Workbooks			
Summary	Price Book	Chart	Reports	Address	Profit	Inflat	ion
My Jobs \ Job S	ummary						
Workbook Name		Remarks	. Total Cost	Comments	. Linked to Spec?	Complete?	Last opened
boler Glow-Worm Cor Sas Pipe Install Vertic Sas Pipe Install Vertic Copper Pipe Install Vertic Vester Pipe Install Vertic Vester Pipe Fixings Waste Pipe Install 40 Duckide Tap Pipe Install Vertical IC Vester Pipe Install Vester Pipe Install Vertical IC Vester Pipe Install Vertical IC Nashing Wals Phone Install Vertical IC Nashing Vester Pipe Install Vertical IC New Pipe Install Vestical IC	infal Copper End Feed al Copper End Feed 1 Copper Microbore Isatic Microbore Isatic Microbore Isatic Microbore Isatic Microbore ator 600 Deep Pisstic Satic Micro						
No of Items 20		Sub To (ex YAT & Pro					

[15] EstimatorXpress® then transfers you to the Job Summary screen. This screen provides an overall summary of the estimate.

From this screen, you can open individual **Workbooks** to estimate the various parts of your **Job**.

By double clicking on the tabs along the top of the screen, you can also access the **Price Book** which has now been copied into your **Job**, access the **Bar Chart Planner** and **Report Manager** as well as modify the **Customer Address** details and change the **Job Inflation Rates** and **Job Profit Margins**.

Note that from within the **Price Book** tab inside a **Job**, you can also synchronise the prices being used in this **Job** with the **Master Price Book**.

Press Help or the F1 Key on your keyboard for further details.

You have now assembled the basic elements for estimating the heating system & new bathroom. You have:

- ✓ Named the Job and entered a Customer Address
- ✓ Selected a Price Book
- ✓ Chosen a Group of Workbooks (to tell EstimatorXpress® what elements are included in the Estimate)
- ✓ Specified a Job Start Date and selected a Bar Chart
- ✓ Set Profit Margins and Inflation Rates

You are now ready to start estimating!

NOTE: EstimatorXpress® has made <u>COPIES</u> of the Price Book and Workbooks and transferred them into your Estimate, ensuring you do not damage the originals.

Any changes you make to the Price Book and Workbooks in your estimate *will not* affect the Master Price Book and Workbooks in their respective Libraries. Remember that the Master versions of the Price Book and Workbooks can only be viewed or modified using the My Settings Menu.

lf y	ou wish to stop and close the estimate you have created so far:	
1.	Press Close button on the top left of the Job Summary Screen.	Close
2.	You will now be in the <b>My Jobs</b> screen. Close this screen, once again using the <b>Close</b> button.	Close
3.	You are now transferred to the <b>Main Menu</b> screen. To close <b>EstimatorXpress</b> ® press the <b>Exit</b> button in the top right of the screen.	×

## **ESTIMATING THE SYSTEM INSTALL & BATHROOM**

#### **BOILER & GAS CONNECTIONS**

15.00 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial. If you have joined this tutorial after having closed **EstimatorXpress**®, see the following steps:

If you wish to start this tutorial having closed EstimatorXpress®:		
1.	Press the My Estimates button at the top of the Main Menu screen.	
2.	This will transfer you to <b>My Jobs</b> . Click on the <b>Job</b> called Mr Phillips or whatever name you chose when you created it.	
3.	Press the <b>Open Estimate</b> button. You are now ready to start the next tutorial.	Open Estimate

Now that you have set up the estimate in **EstimatorXpress**®, you can now start actually estimating. This exercise will lead you through the estimating of the **Boiler** together with its associated **Gas Connection** for the new system.

**EstimatorXpress**® has a number of different **Workbooks** used to estimate for boilers. They are broken down by the fuel type (oil or gas) and then by manufacturer. Once you have decided which boiler you will be using in your estimate you can find the appropriate **Workbook**. In this case we are going to use a **Glow-Worm Flexicom 30CX** which is a gas combi boiler so we will be using the **Workbook** called **Boiler Glow-Worm Combi**.

The **Boiler Glow-Worm Combi Workbook** is an example of a **Composite Workbook** (see page 15 for an explanation of this). It is simply a collection of items of **Labour** and **Material** required to fit the specific boiler required. You should review each item to see if they are required and that the quantities and prices are adequate. Additionally we will move on to estimate for the gas connection to the boiler and later the water connections providing the flow and return to the heating system and to the domestic hot water system.

Summary	Price Book	Chart	Reports	Address	Profit	Inflat	ion
My Jobs \ Job S Workbook Name	ummary	Remarks	. Total Co	ist Comments	. Linked to Spec?	Complete?	Last opened
soler Glow-Worn Con Sac Pipe Install Vertic Sac Pipe Install Vertic Opper Pipe Install Vertic Opper Pipe Install Vertic Raddetor Tale ISmm C Raddetor Tale ISmm C Raddetor Tale ISmm C Naste Pipe Install Vertical Co Saddetor Tale ISmm C Saddetor Tale ISmm C Sadde	rical copper End Feed al Copper End Feed Isome Fixings 135 opper Microbore assic Microbore assic Microbore tim pper Solder Ring opper skor 600 Deep Plastic stric Micro						
No of Items 20		Sub Tot	al F -				

[1] The **Job Summary** screen is the "control centre" or "hub" of your Estimate.

Notice that EstimatorXpress® has copied the Plumbing Demonstration Workbooks into the Job Summary screen.

At this stage, no costs are indicated for each **Workbook**, as you have not carried out any estimating for the job.



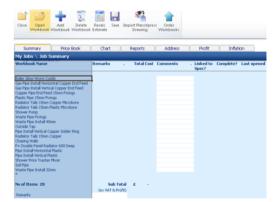
Open Workbook For further Help about this screen press the Help button or press the function key F1.

NOTE: If any of the descriptions are not fully visible in any cell or you see ##### anywhere on screen, click the right mouse button, with the mouse over the #####, and select the **Autofit** option from the popup menu. This will automatically fit any text into the cell.

[2] To start estimating, select a **Workbook** from the left-hand side of the screen with the cursor.

Press Open Workbook button.

Click on Boiler Glow-Worm Combi.



- Image: Section 2000
   Image: Section 2000

   Summary Real Book
   Chart
   Reports

   Address
   Polit
   Inflaton

   Market Mannary L Real Records
   Address
   Polit

   Summary Real Book
   Chart
   Reports

   Address
   Polit
   Inflaton

   My Adds Mo Sammary L Real Records
   Records

   Construct Mannary L Real Records
   No. of Rems

   Construct Mannary L Real Records
   Construct Mannary L Real Records

   Construct Mannary L Real Records
   Construct Mannary L Real Records

   Construct Mannary L Real Records
   Construct Mannary L Real Records

   Construct Mannary L Real Records
   Construct Mannary L Real Records

   Construct Mannary L Real Records
   Construct Mannary L Real Records

   Construct Mannary L Real Records
   Construct Mannary L Real Records

   Mannary Records
   Records Records

   House
   Construct Mannary L Record Records

   House
   Construct Mannary L Records Records

   House
   Construct Mannary L
- [3] EstimatorXpress® transfers you to the Summary of Boiler Glow-Worm Combi Workbook.

The **Summary of Boiler Glow-Worm Combi Workbook** is used to list different **Worksheets** that are stored within each **Workbook**.

Each **Worksheet** in this **Workbook** can contain a different Boiler.

TIP: If you wanted to add any additional **Worksheets** to the **Boiler Glow-Worm Combi Workbook**, you can simply click the **Add Worksheet** button located on the Toolbar and the dialog box asking for a Name and Location for your new **Worksheet** will appear. Alternatively you can select a similar boiler and press the **Copy Worksheet** button to use it as a template for your new boiler **Worksheet**.

38 Tutorial -	Boiler &	& Gas	Connections
	D01101 0	~ 040	001110000010110

Close Open Add Worksheet Worksheet V	Copy Delete Vorksheet Worksh					
Summary Price Bo	ook Cha	rt Re	eports	Address	Profit	Inflation
My Jobs \ Job Summary \ List of Items in this workbook Sheet Name	Boiler Glow-Wo		. Total Cost	No.	of Items	Comments .
	Refine to the	Location	- Total Cost	1104	or recins	
Glow-Worm Ultracom 30CX		House	£		-	Cost of setting 'No. of Items' to 1 is £1616.85
Glow-Worm Ultracom 24CX		House	£	-	-	Cost of setting 'No. of Items' to 1 is £1483.55
Glow-Worm Ultracom 38CXI Glow-Worm Ultracom 30CXI		House House	÷	-		Cost of setting 'No. of Items' to 1 is £2046.85
Glow-Worm Ultracom 30CXI Glow-Worm Ultracom 24CXI		House	£			Cost of setting 'No. of Items' to 1 is £1758.75 Cost of setting 'No. of Items' to 1 is £1622.23
Glow-Worm Elexicom 30CX		House	f			Cost of setting 'No. of Items' to 1 is £1622.23
Glow-Worm Flexicom 24CX		House	Ē	-	-	Cost of setting No. of Items' to 1 is £1364.23
*			£	-		

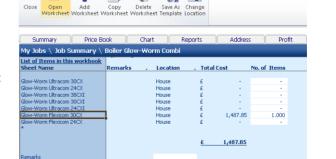
[4] If this is the first time you have opened the Boiler Glow-Worm Combi Workbook, you will see a list of different Glow-Worm Gas Combi boilers. The No. of Items column will have a 0 quantity next to each boiler and the Comments column will display the cost of buying and fitting one of each type of boiler.

Close Open Worksheet I	Add Co Norksheet Work		Siwe As t Templat	Change Location				
Summary	Price Book	Chart		Reports	Address	s Profit	Inflation	
My Jobs \ Job St		ier Glow-Wor	m Combi					
ist of Items in this sheet Name		marks .	Location	. Tot	al Cost	No. of Items	Comments	
low-Worm Ultracom 3	ocx.		House	6			Cost of setting 'n	o. of Items' to 1 is £1616.85
low-Worm Ultracom 2			House	£			Cost of setting 'N	o. of Items' to 1 is £1483.55
low-Worm Ultracom 3			House	6			Cost of setting 'N	o. of Items' to 1 is £2046.85
low-Worm Ultracom 3			House	6				o. of Items' to 1 is £1758.75
low-Worm Libracom 2	DCO0		House	٤			Cost of setting 'N	o. of Rems' to 1 is £1622.23
low-Worm Flexicom 3			House	6	1,487.85	1.000	Cost of setting "	o. of Items' to 1 is £1487.85
Sow-Worm Plexicorn 2	4CX		House	£			Cost of setting 'N	o. of Items' to 1 is £1364.23
				£	1,487.85			

[5] We are going to use the Glow-Worm Flexicom 30CX boiler in our system so click in the No. of Items column on the row containing the Glow-Worm Flexicom 30CX and enter a quantity of 1. You will then see the price of this boiler added to your estimate.

This is all you need to do to estimate for fitting a boiler but we'll now go in to the boiler **Worksheet** to have a look at what's been included.

3



-1



[6] Open the Glow-Worm Flexicom 30CX Worksheet by selecting the Worksheet and pressing the Open Worksheet button.

- Boiler Glow-Worm Combi: Review Resources Page 1 of 1 h. [7] The Glow-Worm Flexicom 30CX Worksheet has now been . opened and the **Resource** Wizard dialog box has popped up. The Resources Wizard Item Used For: Combination boile allows you to review and change Select Resource Type: Boilers Gas any item of Material, Labour, • Resource Used Plant, Subcontract Work or Glow-Worm Flexicom 30cx Combi Boiler 💌 Sundry that is being used inside Build Phase: Quantity: 1.00 Each Order Qty: 1.08 Each Plumb 1st Fi Canbo the Worksheet. Click on the Item Cost: £1.109.00 per Each Combination Boiler label. Notice Usage Factor: Estimate Rate: £1,109.00 per Ead that this item is now highlighted in Total Cost including Wastage: £1,192.18 yellow. 🎲 Edit Build Phase & Usage Factor No Options Available Materia Close 🚗 Bad Finish
- [8] On the right hand side of the dialog you will see that the Resource Used i.e. GLOW-WORM Flexicom 30cx Combi Boiler and also the Build Phase, Quantity, Cost, Order Quantity, Usage Factor, Estimate Rate and Total Cost including Wastage are also displayed here for this product. To change the Resource Used you can simply select a different boiler from the Resource Used drop-down menu.
- [9] You can also look at Labour and Plant associated with the boiler in the same way. To do this select Labour, Plant, Subcontract & Sundry from the drop down menu at the bottom of the page.

Material	-
Material	
Labour, Plant, Subcontract & Sundry	



[10] Notice that the drawing now has a label for the **Labour** associated with fitting the boiler.

Click on **Fit and connect boiler/flue fit** to review the labour for this item.

[11] Under Quantity on the right hand side you can see that 10 Hours have been allowed to carry out this task. If you only want to allow 9 hours you can delete the 10 and type in 9 instead. You will see the Total Cost including Wastage figure will drop to represent the change in rate to Fit and connect boiler/flue kit.

iler Glow-Worm Coml	oi: Review Resources - Page 1 of 1	-	-	_	3
				-	<u> </u>
				Item Used For: Fit and connect boiler/	lue kit
				Select Resource Ty	pe:
				Plumber	<b>•</b>
	Fit and connect boller/flue kit			Resource Used:	
	His and connect poler/hide kit.			Plumber	-
				Build Phase: Plumb 1st Fix	Quantity: 9 Hours
				Item Cost: £20.00 per Hours	Order Qty: 9.00 Hours
				Usage Factor:	Estimate Rate: £20.00 per Hours
				Total Cost including £180.00	
				🕜 Edit Build Phase	e & Usage Factor
No Options Available	Labour, Plant, Subcontract & Sundry	-	₫ose	💽 Back	

€Einish

[12] Click Finish to return to the Glow-Worm Flexicom 30CX Worksheet.



[13] Then press the Close button to return to Summary of Boiler Glow-Worm Combi Workbook.

Close Change Edit Resource Resource	Markers Views Ad Resou					
Summary Pr	ice Book Cha	rt Rep	orts	Address	Pri	ofit
My Jobs 🔪 Job Summa	ry \ Boiler Glow-Wo	orm Combi \ (	Glow-Wori	n Flexicom	30CX - Re	source
No. of Items Total Cost	£	1.00 1,467.85				
Item used for:	Mr Phillips Description		Purchase Unit	Purchase Cost	Build Phase	Prod Usage
Combination boiler Flue kit	Glow-Worm Flexicom 30c		EA FA		Plumb 1st Fix Plumb 1st Fix	
Fit and connect boiler/flue kit *	Glow-Worm Standard Flu Plumber		Hours		Plumb 1st Fix Plumb 1st Fix	
Location	House			No.		
Remarks						



[15] A dialog box pops up asking if this item (Boiler Workbook) is now complete. Click Yes. (*This marks the* Boiler Glow-Worm Combi Workbook "Complete" in the Job Summary Screen )

[14] You will now see a final cost for the **Glow-Worm Flexicom 30CX.** 



Now, to return back to **Job Summary**, press the **Close** button. This will automatically save your **Boiler Glow-Worm Combi Workbook**.

EstimatorXpress	
Is this Workbook now co	mplete?
Yes	No

**1** H ٥., Close Open Add Delete Recalc Save Import PlansXpress Order Workbook Workbook Workbook Estimate Workbooks Drawing Summary Price Book Chart Reports Address Profit Inflation My Jobs \ Job Summary Workbook Name . Linked to Complete? Last opened Remarks Total Cost Comments Spec? Boiler Glow-Worm Combi Gas Pipe Install Horizontal Copper End Feed Gas Pipe Install Vertical Copper End Feed Copper Pipe End Feed 15mm Fixings £ 1,467.85 Completed 18/01/2011 11:22 Copper Pipe Lind Feed Tainin Fixings Plastic Pipe 15mm Fixings Radiator Tails 10mm Copper Microbore Radiator Tails 15mm Plastic Microbore costing for your boiler as part of your overall estimate in the Job Summary Radator Talls 15mm Plastic Microbore Shower Pump Waste Pipe Fixings Waste Pipe Install 40mm Outside Tap Pipe Install Vertical Copper Solder Ring Radiator Talls 15mm Copper Chasing Walls P+ Double Panel Radiator 600 Deep P+ Double Panel Radiator 600 Deep P+ Double Panel Radiator 600 Deep Pipe Install Horizontal Plastic Pipe Install Vertical Plastic Shower Price Tracker Mixer Soil Pipe Waste Pipe Install 32mm Sub Total £ 1,467.85 No of Items 20 (ex VAT & Profit)

Next we are going to allow for the gas pipes to connect from the meter to our boiler. EstimatorXpress® has several Workbooks to allow for this. Gas pipes are divided up into different Workbooks depending on the connection method (Solder Ring and End Feed) and whether the pipes will be laid horizontally or vertically.



screen.

You will now see a final estimate

[16] To start estimating your Gas Pipes in the Job Summary screen, select Gas Pipe Install Horizontal Copper End Feed and press the Open Workbook button.

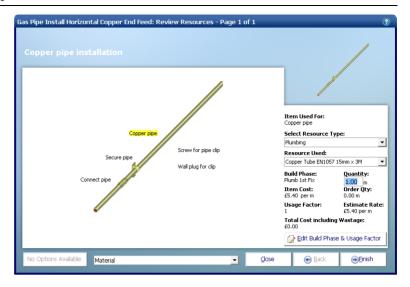
[17] Again you will see that there are different types of Gas Pipes already set up in the Workbook that you can price up. In this case we are going to surface mount our 15mm pipes feeding the boiler and will allow for 9 metres.

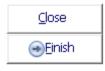
	kit Tools/Options			Estimat	irXpress - Job 5: Mr Phillips, S	ystem Install
Close Open Add Worksheet Worksheet W	Copy Delete Save Yorksheet Worksheet Temp					
Summary Price Bo	ook Chart	Reports	Address	Profit	Inflation	
ty Jobs \ Job Summary \	Gas Pipe Install Horizo	intal Copper End F	eed			
ist of Items in this workbook iheet Name	Remarks . Locat	on . Total Cost		ength of Pipe	Comments .	
Usen Coper in Tabler Floor Elina Coper in Charnel Usen Coper in Charnel Usen Coper in Control Elina Coper Safate Madd Coper Safate Madd Com Coper Safate Madd	House House House House House House House House House House House House House House				Cost of setting le Cost of setting le	angle of Pipe' to 1 = 6 ± 4.55 might of Pipe' to 1 = 6 ± 1.43 might of Pipe' to 1 = 6 ± 1.43 might of Pipe' to 1 = 6 ± 1.45 might of Pipe' to 1 = 6 ± 1.45 might of Pipe' to 1 = 6 ± 1.45 might of Pipe' to 1 = 6 ± 1.43 might of Pipe' to 1 = 6 ± 2.03 might of Pipe' to 1 = 6 \pm 2.03might of Pipe' to 1 = 6 \pm 2.03
Descusio		£				



[18] Select the 15mm Copper Surface Mount Worksheet and click Open Worksheet.

[19] The Resources Wizard is now loaded showing the details of the pipe, the connections and the clips to mount the pipe to the wall. You will notice that the Total Cost including Wastage is set to £0.00. This is because we haven't set the length of pipe required. We will do this shortly.





[20] Press Close or Finish to close the Resources Wizard.

📄 🔞 📝 🛃 📦 🌼 🥺

[21] At the top of the page you can see that the **Length of Pipe** is set to 0. Change this to 9 to allow for 9m of pipe and press **Enter** on your keyboard.

Close Change Resource	Edit Markers View Resource	/s Add Resources *	Resources Wizard											
Summary	Price Book	Chart	Reports	Addr	ess		Profit	Inflation						
My Jobs \ Job	Summary \ Gas Pip	e Install Hori	izontal Copper	End Feed	\ <b>15</b> m	nm Ca	opper Surfa	ace Mount - F	Reso	urces				
Length of Pipe Total Cost	£		9.0 112.3	0										
Item used for:	Mr Phillips Description			Purchase			Build Phase	Production/ Usage Factor	Est	imate Rate	Unit	Waste Factor	Type Resource	Quantity Per Item
Copper pipe	Copper Tube EN1057 15n						Plumb 1st Fix	1.00000	£	5.40	М	7.50%	Plumbing Material	1.000
Secure pipe	Clip Over Pipe Clip 15mm		E tools (2000 book)	EA			Plumb 1st Fix Plumb 1st Fix	1.00000		0.20	M PK	7.50%	Plumbing Material Screws and Fixings Material	1.000
Screw for pipe clip Wall plug for clip	Wood Screws Steel CSK T Red Wall Plups (100 Box)		1.5 inch (200 box)	E E			Plumb 1st Pix	0.00500		0.03	FA		Screws and Poings Material Screws and Fixings Material	1.000
Connect pipe	Copper End Feed Straight			E			Plumb 1st Fix	0.33333		0.07	м	7.50%	Copper Fittings Material	1.000
Lay pipe and dip	Gas Installer			Hours			Plumb 1st Fix	0.11111		3.33	м	0.00%		1.000
Solder connections *	Gas Installer			Hours	£ 30	0.00 F	Plumb 1st Fix	0.10000	£	3.00	м	0.00%	Gas Installer Labour	1.000
Location	House					No.		7						
Remarks														

# VIEWING THE OUTPUT FOR THE GAS PIPES

5.00 Minutes

In this section of the tutorial, you will look at the output that EstimatorXpress® produces.

EstimatorXpress® has costed and produced a schedule of Materials, Labour and Plant required for fitting the 9 metres of 15mm copper gas pipes, including costs and an allowance for wastage.

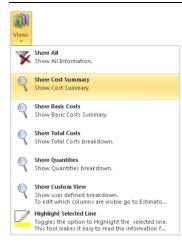
[22] You will see that EstimatorXpress® has calculated the order quantities and costs associated with all the Material and Labour, including an allowance for wastage for all of the Horizontal 15mm Copper End Feed Gas Pipes. Scroll across the screen with the horizontal scroll bar to see all of the data.

Close Change Resource	Edit         Mariers         Views         Add         Resources           Resources         Nitzerd           Price Book         Chart         Reports	Address Profit	Inflation									
	The second		Д								A	
	Summary \ Gas Pipe Install Horizontal Copper E		Surface Mount - R	esources							😵 Help	& Support
Length of Pipe	9.00											<b></b>
Total Cost	£ 112.36											
Item used for:	Mr Phillips Description	Purchase Purchase Build Unit Cost Phase	Production/ Usage Factor		Waste Unit Factor		Quantity Per Item	Total Quantity	Cost	Wastage Cost	Total Cost	Quantit
Copper pipe	Copper Tube EN1057 15mm x 3M	M £ 5.40 Plumb 1:			M 7.50%		1.000	9.000	£ 48.60	£ 3.65	£ 52.25	9.0
Secure pipe	Clip Over Pipe Clip 15mm	EA £ 0.20 Plumb 1:			M 7.50%		1.000	9.000	£ 1.80			9.0
Screw for pipe clip	Wood Screws Steel CSK Twin Thread 8 x 1.5 inch (200 box)	BX £ 6.70 Plumb 1:				Screws and Fixings Material	1.000	9.000	£ 0.30			0.0
Wall plug for clip	Red Wall Plugs (100 Box)	EA £ 2.20 Plumb 1:			EA 7.50%		1.000	9.000	£ 0.20			0.0
Connect pipe	Copper End Feed Straight Coupler 15mm Gas Installer	EA £ 0.20 Plumb 1: Hours £ 30.00 Plumb 1:			M 7.50% M 0.00%		1.000	9.000	£ 0.60 £ 30.00			3.0
Lay pipe and clip Solder connections		Hours £ 30.00 Plumb 1: Hours £ 30.00 Plumb 1:			M 0.00% M 0.00%		1.000	9.000	£ 30.00 £ 27.00		£ 30.00 £ 27.00	1.0
*	ado ti localiar	Hours £ 30,00 Humb 1	CHX 0.10000	£ 3.00	M 0.00%	Gas Installer Cabbur	1.000	9,000	£ 27.00	r .	£ 27.00	0.5
Location	House	No.	7						£108.50	<u>£ 3.86</u>	£112.36	
Remarks												

[23] Now use the Views drop-down menu to look at the output. Choose from Show Cost Summary, Show Basic Costs, Show Total Costs, Show Quantities and Show All.

Close Change Resource	Resource *	Views	Add Feources Resources Show All Information.															
	Price Book Summary \ Ga	Q	Show Cost Summary Show Cost Summary.	Profit opper Surf	Inflation ace Mount - R	tesou	irces								_	۰	Help 8	Support
Length of Pipe Total Cost	£ Mr Phillips	Q	Show Basic Costs Show Basic Costs Summary.	Build	Production/	Estin	nate		Waste		Quantity	Total	(	ost	Wastag	e	Total	Î
Copper pipe Secure pipe Screw for pipe clip	Description Copper Tube EN105 Clip Over Pipe Clip : Wood Screws Steel	Q	Show Total Costs Show Total Costs breakdown.	Phase Plumb 1st Fix Plumb 1st Fix Plumb 1st Fix	1.00000 0.00500	£ £ £	5.40 0.20 0.03	M M PK		Type Resource Plumbing Material Plumbing Material Screws and Fixings Material	1.000 1.000 1.000	9.000 9.000 9.000	£	8.60 1.80 0.30	£ 3.6 £ 0.1 £ 0.0	5 £ 4 £ 2 £	Cost 52.25 1.94 0.32	Quantit 9.0 9.0 0.0
Connect pipe	Red Wall Plugs (100 Copper End Feed S Gas Installer Gas Installer	Q	Show Quantities Show Quantities breakdown.	Plumb 1st Fix Plumb 1st Fix Plumb 1st Fix Plumb 1st Fix	0.33333 0.11111	£	0.02 0.07 3.33 3.00	M M	7.50% 7.50% 0.00% 0.00%	Screws and Fixings Material Copper Fittings Material Gas Installer Labour Gas Installer Labour	1.000 1.000 1.000 1.000	9.000 9.000 9.000 9.000	£ £ 3	0.20 0.60 0.00 7.00	£ 0.0 £ 0.0 £ - £ -	4 £ £	0.21 0.64 30.00 27.00	0.0 3.0 1.0 0.9
* Location	House	Q	Show Custom View Show user defined breakdown. To edit which columns are visible go to Estimato		7								<u>£10</u>	<u>8.50</u>	£ 3.8	<u>6 £1</u>	12.36	
Remarks			Highlight Selected Line Toggles the option to Highlight the selected line. This tool makes it easy to read the information f															=

#### 44 Tutorial - Boiler & Gas Connections



If you press **Show Cost Summary** button from the **Views** drop-down menu, you will see a summary of Costs, Wastage Costs and Total Cost inc. Wastage for each **Resource.** 

If you press **Show Basic Costs** button from the **Views** drop-down menu, you will see basic cost information including Purchase Unit, Cost per Purchase Unit and No. of Units required for each **Resource**.

If you press **Show Total Costs** button from the **Views** drop-down menu, you will see extended cost information including Estimated Units Required, Total Quantities including Wastage, and Total Cost for each **Resource**.

If you press **Show Quantities** button from the **Views** drop-down menu, this shows Total Quantities of materials required including wastage for each **Resource**.

If you press **Show All**, this shows you all the **Resources Output** for the estimate relating to **Gas Pipes**.

Close



[24] Assuming you are satisfied with the estimate output for your Gas Pipes press the Close button to return to the Summary of Gas Pipe Install Horizontal Copper End Feed Workbook.

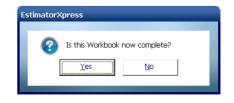
Close Change Resource		Resources *	Resources Wizard					_				
Summary	Price Book	Chart	Reports	Addre		Profit	Inflation					
	Summary \ Gas Pip	pe Install Hori	zontal Copper E	nd Feed \	15mn	n Copper Sur	face Mount - F	tesc	urces			
Length of Pipe			9.00									
Total Cost	£		112.36									
	Mr Phillips			Purchase	Purcha	ise Build	Production/	Est	imate		Waste	
Item used for:	Description			Unit	C	ost Phase	Usage Factor		Rate	Unit	Factor	Type Resource
Copper pipe	Copper Tube EN1057-15	mm x-3M		M	£ 5.	40 Plumb 1st Fb	1.00000	£	5.40	м	7.50%	Plumbing Material
Secure pipe	Clip Over Pipe Clip 15mm			EA	£ 0.	20 Plumb 1st Fb	1.00000	£	0.20	M	7.50%	Plumbing Material
Screw for pipe dip	Wood Screws Steel CSK	Twin Thread 8 x 1	.5 inch (200 box)	BX	£ 6.	70 Plumb 1st Fit	0.00500	£	0.03	PK	7.50%	Screws and Fixings Material
Wall plug for dip	Red Wall Plugs (100 Box	)		EA	£ 2.	20 Plumb 1st Fb	0.01000	£	0.02	EA	7.50%	Screws and Fixings Material
Connect pipe	Copper End Feed Straigh	t Coupler 15mm		EA	£ 0.	20 Plumb 1st Fb	0.33333	£	0.07	м	7.50%	Copper Fittings Material
	Gas Installer			Hours	£ 30.	00 Plumb 1st Fit	0.11111	£	3.33	м	0.00%	Gas Installer Labour
Solder connections	Gas Installer			Hours	£ 30.	00 Plumb 1st Fb	0.10000	£	3.00	м	0.00%	Gas Installer Labour

Summary	Price Book	Chart	Reports	Addres	s Profit	Inflation	
ty Jobs \ Job S	Summary \ Gas	Pipe Install Hor	izontal Copp	er End Feed			
ist of Items in th							
Sheet Name	Ren	narks . Loc	ation . T	otal Cost	Length of Pipe	Comme	15.
Smm Copper in Timb	or Electr	Hou				Fort of a	etting 'Length of Pipe' to 1 is £14.55
Smm Copper in Loft		Loft					etting 'Length of Pipe' to 1 is £14.35
Sinn Copper in Dire		Hou					stting 'Length of Pipe' to 1 is £12.43
Simil Copper in Cris Simil Copper in Con		Hou					etting 'Length of Pipe' to 1 is £12.43
5mm Copper In Cory 5mm Copper Surfac		Hou		112.36	9,000	Lose of s	econg Length of Pipe to 1 is £14.66
5mm Copper Surfac		Hou		112.30	9.000	Cost of a	etting 'Length of Pipe' to 1 is £13.30
ann Copper In Cha		Hou					etting 'Length of Pipe' to 1 is £18.84
ann Copper In Con		Hou					stting 'Length of Pipe' to 1 is £21.59
ann Copper In Loft		Loft					stting 'Length of Pipe' to 1 is £20.91
2mm Copper In Tim		Hou					tting 'Length of Pipe' to 1 is £20.96
2mm Copper Surfac		Hou					etting 'Length of Pipe' to 1 is £18.90
2mm Copper Surfac		Hou					etting 'Length of Pipe' to 1 is £20.05
Imm Copper Juriac		Hou					etting 'Length of Pipe' to 1 is £26.40
Smm Copper In Con		Hou					stting 'Length of Pipe' to 1 is £31.44
Imm Copper In Loft		Loft					etting 'Length of Pipe' to 1 is £28.91
8mm Copper In Tim		Hou					tting 'Length of Pipe' to 1 is £28.53
8mm Copper Surfac		Hou					tting 'Length of Pipe' to 1 is £26.46
8mm Copper Surfac		Hou					etting 'Length of Pipe' to 1 is £27.75
		100				Cost of a	,
				112.36			

**F** 

[25] Now, to return back to the Job Summary, again press the Close button. This will automatically save your Gas Pipe Install Horizontal Copper End Feed Workbook.

[26] A dialog box pops up asking if this item (Gas Pipe Install Horizontal Copper End Feed) is now complete. Click Yes. (This marks the of Gas Pipe Install Horizontal Copper End Feed "Complete" in the Job Summary Screen)



Close Open Workbook W	Add Delete Iorkbook Workbook		aport PlansXpres Drawing	s Order Workbooks			
Summary	Price Book	Chart	Reports	Address	Profit	Inflat	ion
My Jobs \ Job Su	mmary						
Workbook Name		Remarks .	Total Cost	Comments	. Linked to Spec?	Complete?	Last opened
Belen Glow Worm Conb Ges Fipe Install Hotson Copper Type End Feed Topper Type End Feed Roadser Tais Somm Ca Radater Tais Somm Fa Radater Tais Some Fa Radate	tal Copper End Read Copper End Read Som Roings Is per Microbore stic Microbore n per Solder Ring pper or 600 Deep astic Sic Xeer		£ 1,467.85 £ 112.36			Completed Completed	16/01/2011 11:22
No of Items 20 Remarks		Sub Tota (ex VAT & Profit)					

You will now see a final cost for your **Gas Pipe Install Horizontal Copper End Feed Workbook** as part of your overall estimate in the **Job Summary** screen.

[27] Now as an exercise, using steps 16-26 as a guide, estimate for the Gas Pipe Install Vertical Copper End Feed Workbook. In this Workbook we need to allow for a surface mounted gas pipe to run up from the ground to the boiler which is mounted 1500mm from the ground. You will need to set the Length of Pipe of 15mm Copper Surface Mount to 1.5.

[28] Your **Job Summary Screen** should now look like this with the cost of three **Workbooks** totalled at the bottom.

Close Open Workbook	Add Delete Workbook Workbook		Import PlansXpres Drawing	s Order Workbooks			
Summary	Price Book	Chart	Reports	Address	Profit	Inflat	ion
My Jobs \ Job S	Summary						
Workbook Name		Remarks	. Total Cost	Comments	<ul> <li>Linked to Spec?</li> </ul>	Complete?	Last opened
Boler Glow-Worm Co Gas Pipe Install Herbic Copper Pipe End Fees Raditor Tals I Simm Raditor Tals I Simm Fix Raditor Tals I Simm I Shower Punp Wasto Pipe Install A 40 Outside Tap Outside Tap Rep Install Wettad D Visition Pipe Install A Pipe Install Verticad P Shower Price Tracker Soli Pipe Wasto Pipe Install 32 *	ontal Copper End Feed al Copper End Feed d ISmm Fbings ings Copper Microbore Plastic Microbore mm opper Solder Ring Copper Biotor 600 Deep IPlastic Isatic Micro		£ 1,467.85 £ 112.36 £ 18.73			Completed Completed Completed	18/01/2011 11:22 18/01/2011 11:24 18/01/2011 11:25
No of Items 20 Remarks		Sub Tot (ex VAT & Profi					

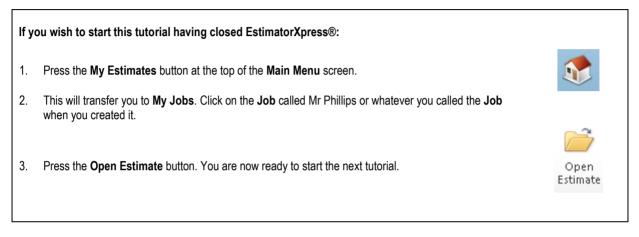
lf you	u wish to stop and close the current Estimate:	
1.	Press <b>Close</b> button on the top left of the <b>Job Summary</b> screen.	Close
2.	You will be transferred to the <b>My Jobs</b> screen. Close this screen also using the <b>Close</b> button.	Close
3.	You are now in the <b>Main Menu</b> Screen. To close <b>EstimatorXpress</b> ® press the <b>Exit</b> button on the top right of the screen.	×

## **COPPER PIPE END FEED 15MM FIXINGS**



If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

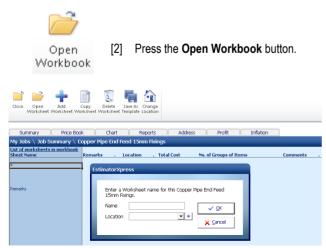
If you have joined this tutorial after having closed EstimatorXpress®, follow the steps below:



This tutorial leads you through the estimating of the Copper Pipe End Feed 15mm Fixings.

The **Copper Pipe End Feed 15mm Fixings** is an example of a **Workbook** with a **Dimensions Wizard** to which you add any **Sundry items** that you require. (See page 16 for an explanation of this.) The **Copper Pipe End Feed 15mm Fixings Workbook** allows you to enter the quantities of all the common 15mm End Feed fixings plus there is a sundry area for if you need to enter any special fixings that are not given as an option by default.

[1] To start estimating your Copper Pipe End Feed 15mm Fixings in the Job Summary screen, select Copper Pipe End Feed 15mm Fixings.



[3] You are now transferred to Summary of Copper Pipe End Feed 15mm Fixings Workbook and a dialog box will automatically pop up asking you to give a name and a location for a new Worksheet. This is because this Workbook doesn't have any Worksheets set up yet so it prompts you to create one.

EstimatorXpress® Plumbing & Heating Trade Edition Tutorial



EstimatorXpress	
Select a Dimensional Template, or click Ec own. <del>Fuing allowance 25m pipe</del> Fixings allowance 50m pipe Fixings allowance 100m pipe	lit to create your          Select         Edit         Cancel

画 Next

Enter Dimensions Page	e 1 of 3			_	0
Elbows and coup				_	
	Number of elbows (No.)	5			
	Number of obtuse elbows (No.)	0			
	Number of street elbows (No.)	0			
	Number of male elbows (No.)	0			
	Number of female elbows (No.)	0			
	Number of female wallplate elbows (No.)	0			
	Number of straight couplings (No.) Number of straight silo couplings (No.)	0			
		-			
	ELBOWS AND COUPLINGS				
	Show Tech Tip Show Tech Labels	188	X Cancel	💽 Back	⊛Next

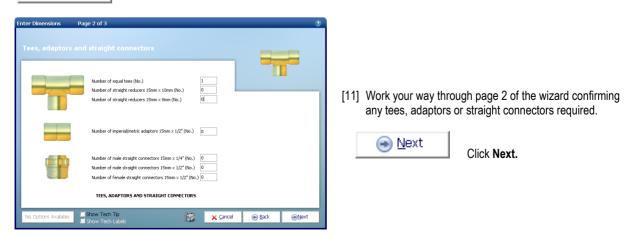
- [4] Enter **Gas Pipe Fixings** or any name you think is sensible and then select **House** for location. Click **OK**.
- [5] EstimatorXpress® transfers you to the Gas Pipe Fixings Worksheet Dimensions screen.
- [6] Another dialog box will automatically pop up asking you to select a template. These templates provide a starting point for you to enter the amount of each type of fixing that you require. It doesn't matter if there is not a template that matches your exact requirements as everything can be changed once you've selected a starting point. Because we only have a short length of pipe to fix choose the Fixing Allowance 25m pipe template.

#### [7] Click Select.

- [8] EstimatorXpress® Dimensions Wizard will automatically open up a dialog box containing drawings to assist you in entering and confirming the quantities of each fixing that you require.
- [9] Work your way through the fixings on screen confirming the quantities required. Set the Number of Elbows to 5 and the rest of the fixings to 0. You can press Enter to jump to the next box after making any changes necessary.

NOTE: The **Gas Pipe Install Vertical Copper End Feed Workbook** allowed for one straight coupling for every 3 metres of pipe estimated. The wizard allows you to include any you will need in addition to those.

[10] Once you have entered all the appropriate quantities click Next.



Number of storag	nt tap connectors 1 nt tap connectors 1 ap connectors (No.) nds with an air ven oss overs (No.)	5mm × 1/2" (No.) 0 5mm × 3/4" (No.) 0 ) 0			<ul> <li>[12] On the final page of the Dimensions Wizard, set the quantity of tap connectors, stop ends and full or part crossovers required.</li> <li>[13] Click Finish to calculate the price (including labour to fit them) of the items you have chosen to include in your estimate.</li> </ul>				
No Options Available Brow Hech ID Prove Tech ID P	ew Resources R Output Chart	Wizard • Reports 1.5mm Fixings \	X Cancel  B Address Pro Gas Pipe Fixings - Din	fit ] Inflation					
escription amber of elbows inder of obtuse elbows inder of strede elbows inder of male elbows inder of female elbows inder of straight couplings inder of straight couplings inder of straight couplings inder of straight couplings inder of straight reducers 15mm × 10 <sup>2</sup> amber of inder straight connectors 15mm × 10 <sup>2</sup> amber of inder straight connectors 15mm × 10 <sup>2</sup> amber of inder straight connectors 15mm × 10 <sup>2</sup> amber of straight connectors	' No.	5.000 			[14] EstimatorXpress® then transfers you back into the Gas Pipe Fixings Worksheet Dimensions Screen showing the quantities you have just entered in the white column. At the top of the screen is the price the you have estimated for the Gas Pipe Fixings to be purchased and fitted.				



[15] Press the Close button to return to the Summary of Copper Pipe End Feed 15mm Fixings Workbook.

You will now see a final cost for the **Copper Pipe End Feed 15mm Fixings Workbook** on screen.

🗋 <i>ট</i>	+ 🗋							
Close Open Worksheet 1	Add Copy Norksheet Workshee		e As Change plate Location					
Summary	Price Book	Chart	Reports	Address	Profit	Inflation		
My Jobs 🔪 Job Su	ummary \ Coppei	· Pipe End Feed	15mm Fixing	;				
List of worksheets i Sheet Name	in workbook Rema	arks . Loc	ation . To	tal Cost No	. of Groups of Ite	ems	Comments	
Gas Pipe Fixings		Hous	e £	18.10	1	.000		
-			f	18.10				
Remarks								



[16] Now to return back to the Job Summary screen, press the Close button. This will automatically save your Copper Pipe End Feed 15mm Fixings Workbook.

EstimatorXpress Is this Workbook now o	omplete? No	[17	7] A dialog b	ox pop:	s up aski	ng if the <b>Wo</b>	<b>rkbook</b> is now complete. Click <b>Yes</b> .
Close Open Add Delete Workbook Workbook Workbook Workbook Workbook Workbook Summary Price Book My Jobs Job Summary Workbook Name Boller Glow-Worm Combi Gas Pipe Install Horizontal Copper End Feed Gas Pipe Install Workbook Copper Find Feed Gas Pipe Install Workbook Microbore Radiator Talls ISmm Fixings Radiator Talls ISmm Fixings Radiator Talls ISmm Rest: Microbore Shower Pump Waste Pipe Enstall 40mm Outside Tap Pipe Install Vertical Copper Solder Ring Radiator Talls ISmm Copper Chasing Walls P+D Duble Panel Radiator 600 Deep Pipe Install Vertical Plastic Pipe Install Stam Copper Shower Pirce Tracker Mixer Soli Pipe Waste Pipe Install 32mm *		f         1,467.85           f         1,467.85           f         1,467.85           f         112.36           f         18.73           f         15.59	Address	Profit Linked to Spec?	Completed Completed Completed Completed Completed	ion Last opened 18/01/2011 11:22 18/01/2011 11:25 18/01/2011 11:25	You will now see a final estimate costing for your <b>Copper Pipe End</b> <b>Feed 15mm Fixings</b> as part of the overall estimate cost on screen.

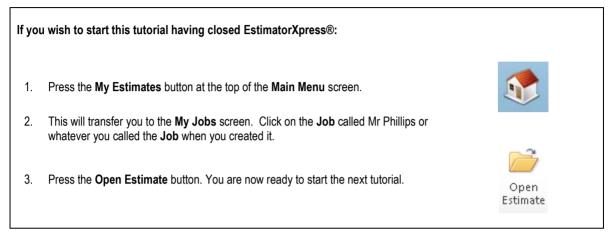
lf y	If you wish to stop and close the current Estimate:						
1.	Press the <b>Close</b> button on the top left of the <b>Job Summary</b> screen.	Close					
2.	You are transferred to the <b>My Jobs</b> screen. Close this screen also using the <b>Close</b> button.	Close					
3.	You are now back to the <b>Main Menu</b> Screen. To close <b>EstimatorXpress</b> ® press the <b>Exit</b> button at the top right of screen.	×					

### RADIATORS

10.00 Minutes

If you are starting this tutorial immediately after the previous section, you are already in the right place to continue with this tutorial.

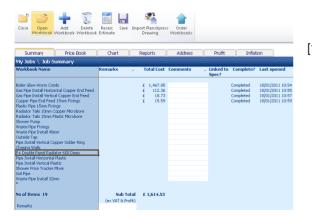
If you have joined this tutorial after having closed EstimatorXpress®, follow the steps below.



This tutorial leads you through the estimating the Radiators and Radiator Tails.

There are numerous radiator **Workbooks** in **EstimatorXpress**® which are broken down by style (K1, K2 or P+) and by the height of the radiator. Each are composite **Workbooks** that cover the cost of the radiator including brackets and the cost of hanging them. There are several different widths of radiator set up in each **Workbooks** so that once you've chosen the style and height of radiator required, all you need to do is set how many of each width are needed for your system.

NOTE: The radiator valves and tails (the length of pipe that connects the radiator valve to the main flow/return pipe work of the heating system) are estimated separately. We will move onto them after we've included for our radiator units.



 For this example we will use P+ Radiators which are 600mm deep. To start estimating the Radiators, select P+ Double Panel Radiator 600 Deep Workbook from the left-hand side of the Job Summary screen with your mouse.



Press the Open Workbook button

- Weigenergie
   Weigenergie
   Weigenergie
   Weigenergie
   Weigenergie

   Weigenergie
   Weigenergie
   Weigenergie
- [2] You are then transferred to the Summary of P+ Double Panel Radiator 600 Deep Workbook. A number of different widths of radiators have been set up as Worksheets. Each Worksheet contains the radiator with bracket, the plugs and screws for fixing the brackets to the wall and the labour to hang the radiators. To see the specified resources and check the time allowed to hang any of the radiators you can select any Worksheet and press Open Worksheet.
- [3] We require 5 radiators 1200mm wide, 1 radiator 1000mm wide and 1 800mm wide. Enter these quantities in the relevant boxes in the **No. of Items** column.
- [4] You will see the total cost that has been allowed for the radiators is totalled up at the bottom of the list of Worksheets.

Is this Workbook now complete?

No

Yes



[5] To return back to the Job Summary screen, press the Close Workbook button. This will automatically save your P+ Double Panel Radiator 600 Deep Workbook.

EstimatorXpress

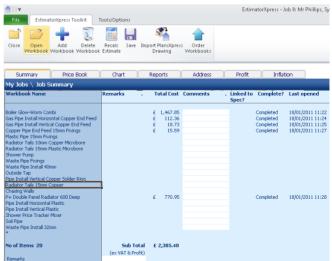
[6] A dialog box pops up asking if this item is now complete.

Click Yes.

- You will now see a final estimate cost for your
   P+ Double Panel Radiator 600 Deep
   Workbook on the Job Summary screen.
- [8] Select Radiator Tails 15mm Copper Workbook from the list of Workbooks on the Job Summary screen.



[9] Press the **Open Workbook** button



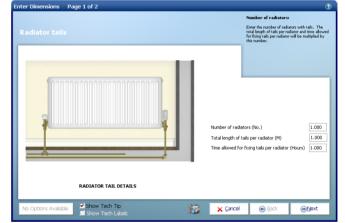
[10] A dialog box pops up asking for the name and location for the first Worksheet in the Radiator Tails 15mm Copper Workbook. Enter a suitable name such as *Radiator Tails* and a suitable location such as *House*.



Estima	torXpre	ss	
G N	inter a Wi iopper. Jame ocation	orksheet name for this Radiator Radiator Tails House	Tails 15mm       ✓ QK       X Cancel

[11] Another dialog box will automatically pop up asking you to select a template. Select the template entitled **Radiator Tail** and click **Select**.

[12] The Dimensions Wizard will pop up. If you are unsure of what to enter into any of the text boxes you can click the Show Tech Tip tick box at the bottom of the Dimensions Wizard to display extra explanation in the top right of the dialog box.

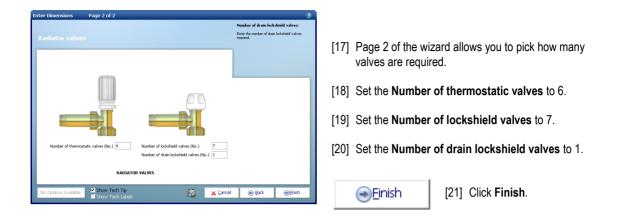


- [13] Enter the **Number of radiators** as 7. As explained in the tech tip the length of tails and time allowed to fit the radiators will be multiplied by this to produce an estimate. You therefore need to enter an average length of tail per radiator.
- [14] Set the **Total length of tails per radiator** to *1*.
- [15] Review the **Time allowed for fixing tails per** radiator and adjust it as required.



[16] Click Next.





[22]	Review the resources being used in the
	resources section at the bottom of the
	screen. If you wish to make any changes
	you can click on the Resources Wizard
	button at the top of the screen.

Resources	Units		<b>Total Quantity</b>	Description
Pipe	M	7.000	7.000	Copper Tube EN1057 15mm x 3M
Thermostatic valves	No.	6.000	6.000	Copper Thermostatic Radiator Valve 15mm x 1/2 inch
Lockshield valves	No.	7.000	7.000	Copper Wheelhead/Lockshield Valve 15mm x 1/2 inch
Drain lockshield valves	No.	1.000	1.000	Copper Drain Lockshield Valve 15mm x 1/2 inch
Fit radiator tails	Hours	7.000	7.000	Plumber
Fit thermostatic valve	No.	6.000	6.000	Plumber
Fit lockshield valve	No.	7.000	7.000	Plumber
Fit drain lockshield valve	No.	1.000	1.000	Plumber
*				

[23] Click Close to return to the <b>Summary of</b> <b>Radiator Tails 15mm Copper Workbook</b> .	Description Author of rolators Tradienty of taking ser radiator Tradienty of taking ser radiator Tradienty of taking taking ser Author of foldminist views function of all service taking Tradienty of taking services Taking	d Output Chanter Tails Location Units No. No. No. No. No. No. No. No. No. No.	rt R 15mm Copp 7.000 1.000 1.000 1.000 7.0000 7.0000 7.0000 7.0000 7.0000 7.0000 7.00000 7.00000 7.000000 7.0000000000	Total Quantity U Radiator Tai	Hescription Specific Terms 311 Thermstatic Science 311 Specific Termstatic Science 311 Specifi
	Rt locishield valve	No. No.	7.000 1.000	7.00 P	
[24] To return back to <b>Job Summary</b> , press <b>Close Workbook</b> button. This will	Open Add Copy Worksheet Worksheet Worksheet V Summary Price Book My Jobs \ Job Summary \ Radiator	Vorksheet Te Chart	Reports		Profit Inflation



Close

[24] To return back to Job Summary, press Close Workbook button. This will automatically save the Radiator Tails 15mm Copper Workbook.

Summary	Price Book	Chart	Reports	Address	Profit	Inflation		
My Jobs \ Job S	Summary \ Radia	tor Tails 15mm	1 Copper					
ist of worksheets sheet Name	<u>in workbook</u> Rem	arks . Lo	ication . To	ital Cost N	o. of Groups of Items	5	Comments	
Ladiator Tails		Hos	150 E	335.67	1.00	0		

- 54 Tutorial Radiators
- [25] A dialog box pops up asking if this item is now complete.

Click Yes.

EstimatorXpr	ess	-	_		-	
	s this Wor <u>Y</u> es		now com		12	
■ <u></u>		<b>#</b>				
Close Open Add Delete Werkbook Workbook Workbook Summary Price Book	Recalc Save Imp Estimate	Prawing Reports	s Order Workbooks Address	Profit	) Infa	tion
Workbook Workbook Workbook	Estimate	Drawing Reports	Workbooks	Linked to		tion Last opened
Werkbook Workbook Workbook Summary Price Book My Jobs \ Job Summary	Chart	Drawing Reports	Address			

[26] You will now see a final estimate cost for your Radiator Tails 15mm Copper Workbook on the Job Summary screen with a sub-total of all the work we've priced for thus far.

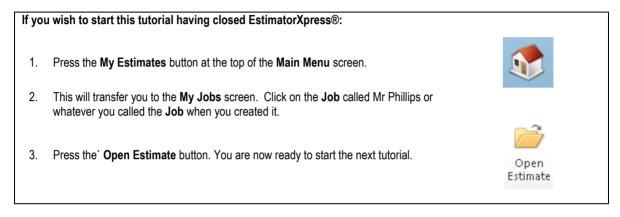
lf y	ou wish to stop and close this current Estimate:	
1.	Press Close button on the top left of the Job Summary screen.	Close
2.	You are transferred to the <b>My Jobs</b> screen. Close this screen also using the <b>Close</b> button.	Close
3.	You are now in the <b>Main Menu</b> Screen. To close <b>EstimatorXpress</b> ® press the <b>Exit</b> button in the top right of the screen.	×



BATHROOM

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

If you have joined this tutorial after having closed EstimatorXpress®, follow the steps below:



This tutorial leads you through estimating of bathroom furniture including the bath, sanitaryware, taps and an electric shower.

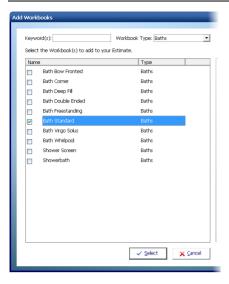


[1] Firstly we will estimate for a bath. There are numerous bath **Workbooks** available to you. To choose a bath to use, click **Add Workbook**.

[2] From the **Workbook Type** filter at the top of the dialog box select **Baths**.

Add Work	ooks		
Keywo	rd(s):	Workbook Type:	
Select	the Workbook(s) to add to you	Estimate.	(All) Bathroom Taps
			Baths
Name		Type	Blank Template Boilers
	Bathroom Taps High Spec	Bathro	
	Bathroom Taps Standard	Bathro	Fitting Out Gas Connections
	Bath Bow Fronted	Baths	Kitchen Taps Pipe Fixings
	Bath Corner	Baths	Plastering
	Bath Deep Fill	Baths	Plumbing Radiators
	Bath Double Ended	Baths	Repovation
	Bath Freestanding	Baths	
	Bath Standard	Baths	Underfloor Heating
	Bath Virgo Solus	Baths	Waste Connections Water Connections
	Bath Whirlpool	Baths	
	Shower Screen	Baths	
	Showerbath	Baths	
	Area	Blank	Template
	Composite Items	Blank	Template
	Composite Items 1	Blank 1	Template
	Composite Items 2	Blank 1	Template
	Composite Items 3	Blank 1	Template
	Perimeter	Blank	Template •
		✓ Selen	ct 🗙 Cancel
			_

### 56 Tutorial - Bathroom



[3] Choose a bath **Workbook** by clicking on the **Workbook** to put a tick next to it. For this example we will use the **Bath Standard Workbook**.

Open Workbook

[4] Select the Bath Standard Workbook then press the Open Workbook button.

[5] You are then transferred to the Summary of Bath Standard Workbook. We are going to have a 1500mm x 700mm bath with grips and space for 2 taps. As you can see there is no sheet set up for this so we are going to create a new Worksheet. Instead of starting from scratch we will copy a similar Worksheet and edit it from there to suit our needs.

Close Open Worksheet W	Add (orksheet Workshe		re As Change Iplate Location				
Summary	Price Book	Chart	Reports	Address	Profit	Inflation	
My Jobs \ Job Su	mmary \ Bath \$	Standard					
List of Items in this Sheet Name	workbook Rema	rks . Loca	ition . Total	Eost No.	of Items	Comments .	
Bath 2TH no grip 1500 >	: 700	Bathr	oom 1 E			Cost of setting 'No. of Items' to 1 is £2	
Bath 2TH no grip 1700 >	(700	Bathr		-	-	Cost of setting 'No. of Items' to 1 is £2	
End Panel 700 *		Bathr	oom 1 £			Cost of setting 'No. of Items' to 1 is £2	24.78
Remarks							



[6] Select Bath 2TH no grip 1500 x 700 and click the Copy Worksheet button.

Copy Worksheet

EstimatorXpress	
Enter a Worksheet name for this Bath Sta Name kath 2TH grip 1500 x 700 Location Bathroom 1 V V	ndard. V QK X Cancel

[7] Name the new sheet Bath 2TH grip 1500 x 700 with a location of Bathroom 1.

[8] You are transferred to the Bath 2TH grip 1500 x 700 Worksheet and the Resource Wizard automatically loads. The Bath has been highlighted. In the Resource dropdown select the product that we added in to the Price Book on page 28, the Standard Bath 2TH with Grips 1500mm x 700mm.

Silicone to bash fittings Bath panel ure bash feet to filtor	Pkg weste	Bath	Rem Used For: Bath Select Resource Type: Batroom Resource Used: Bath Lingrand 27H 1300mm 3/2 Bonowebath Prior 11 700mm Schowebath Prior 11 700mm Sch	: 700mm : 700mm 500em x 700mm nos 675) me 1200mm .7KW .8KW
Options Available Material	•	glose	Traditional Freestanding Bath I Traditional Freestanding Bath F	690mm × 800mm Feet
Resource				
Purchase Cost			ase Quantities	
Purchase Cost		Quan	tity: 1	
Purchase Cost Item used for: Bath Standard Bath 2TH with Grips 1500r	nm x 700mm	Quan	-	
Purchase Cost	nm x 700mm	Quan Wast Build	tity: 1 age: 7.50% Phase	
Purchase Cost Item used for: Bath Standard Bath 2TH with Grips 1500r £120.00 per Each	nm x 700mm	Quan Wast Build	tity: 1 age: 7.50%	
Purchase Cost Item used for: Bath Standard Bath 2TH with Grips 1500r £120.00 per Each Usage Usage Units: EA	nm x 700mm	Quan Wast Build Plum	tity: 1 age: 7.50% Phase	
Purchase Cost Item used for: Bath Standard Bath 2TH with Grips 1500r £120.00 per Each	nm × 700mm	Quan Wast Build Plum	tity: 1 age: 7.50% Phase b 2nd Fix	
Purchase Cost Item used for: Bath Standard Bath 2TH with Grips 1500r £120.00 per Each Usage Usage Units: EA	nm x 700mm	Quan Wast Build Plum Cost : Cost :	tity: 1 age: 7.50% Phase b 2nd Fix	

- [9] A dialog pops up asking you to confirm the product change. Check the details on the page and click **Ok**.
- [10] All of the other details should be set correctly from the original bath that we copied but review them to make sure.

<u>C</u> lo:	se	[11] C	lick	Clos	e t	0	close	the R	le	ຣວເ	urce W	izard.
Close Change Edi Resource Resou Summary	Price Book	Add Resources sources * Wizard		ddress 700 - Res		rofit	: ] Int	lation				
No. of Items Total Cost	£		1.00 237.90								[12]	You v
Item used for:	Mr Phillips Description			Purchase		ost	Phase	Production/ Usage Factor		Rate		This i
Bath Bath panel Plug waste	Standard Bath 2TH w Bath Panel 1500mm Brass Bath Waste with P	ith Grips 1500mm x 700r	mm	EA EA EA	£ 25	.00	Plumb 2nd Fix Plumb 2nd Fix Plumb 2nd Fix	1.00000	£	120.00 25.00 14.00		to 0.
Shallow waste trap Waste pipe Secure bath feet to floor		Twin Thread 6 x 0.75 inch (2	00 box)	EA EA BX	£ 14 £ 4	.00	Plumb 2nd Fix Plumb 2nd Fix Plumb 2nd Fix	1.00000 0.33333 0.02000	£	7.30 4.67 0.08		
Silicone to bath fittings Fit bath, panel and waste *	Silicone Sealant Clear 0.: Plumber	31 Litre		EA Hours			Plumb 2nd Fix Plumb 2nd Fix	1.00000		3.50 20.00		
Location	Bathroom 1					۹0.		8				
Remarks												

[12] You will notice that there is no price currently for our bath. This is because the No. of Items for the Worksheet is set to 0. Change this to 1.



[13] Click Close to return to the Summary of Bath Standard Workbook.

#### 58 Tutorial - Bathroom



[14] We also need one end panel for our bath so set the **No. of Items** for **End panel 700** to *1*.

Close

Add

Workbook

[15] We have now selected our bath and end panel so click **Close** to return to the **Job Summary** screen.

[16] Click Yes when asked 'Is this Workbook now Complete?'



Close Open Workbook	Add Delete Workbook Workbook		aport PlansXpres Drawing	s Order Workbooks			
Summary	Price Book	Chart	Reports	Address	Profit	Inflat	ion
My Jobs \ Job 9	Summary						
Workbook Name		Remarks .	Total Cost	Comments	<ul> <li>Linked to Spec?</li> </ul>	Complete?	Last opened
Gas Pipe Install Verti Capper Pipe End Fess Capper Pipe End Fess Radiator Tais ISmm Fin Radiator Tais ISmm Shower Pump Waste Pipe Install 40 Dubide Tap Pipe Install Vertical IC Radiator Tais ISmm Chasing Walis P+ Double Panel Rac Pipe Install Horizont Pipe Install Horizont Pipe Install Horizont Shower Price Tracker Sol Pipe	sorital Copper End Feed cal Copper End Feed disper Copper Microbore Plastic Microbore Plastic Microbore Doper Solder Ring Copper Solder Ring Copper Hastic Hastic Hastic Hastic Hastic		£ 1,467.85 £ 112.36 £ 18.73 £ 15.59 £ 335.67 £ 770.95			Completed Completed Completed Completed Completed Completed	18/01/2011 11:22 18/01/2011 11:25 18/01/2011 11:25 18/01/2011 11:25 18/01/2011 11:27
Waste Pipe Install 32 Bath Standard * No of Items 21		Sub Total	£ 262.68			Completed	18/01/2011 13:03
Remarks		(ex VAT & Profit)					

You will now see a final estimate cost for your **Bath Standard Workbook** on the **Job Summary** screen with a sub-total of all the work we've priced for thus far.

[17] Next we are going to choose our sanitaryware. Depending on which merchant partner(s) you have subscribed to you will have a varying number of sanitaryware **Workbooks** in your system. To subscribe to any of our merchant partners ring HBXL on 0845 1234 085. To choose a sanitaryware range to use, click **Add Workbook**.

Ade	l Work	books			
	Keyw	ord(s): Workboo	k Type: Sanitaryware	•	
	Selec	t the Workbook(s) to add to your Estimate.			
	Nam	8	Туре		
	V	Sanitaryware Price Tracker Range	Sanitaryware		From the <b>Workbook Type</b> filter at the top of the dialog select <b>Sanitaryware</b> .
					Tick a suitable sanitaryware range. To follow this tutorial select <b>Sanitaryware Price Tracker Range</b> .
			✓ <u>S</u> elect X	Çancel	



[20] Select the Sanitaryware Price Tracker Range Workbook and click Open Workbook.

You are transferred to the **Summary of Sanitaryware Price Tracker Range Workbook**. You will see that there are already **Worksheets** set up for various sanitaryware items.

Close Open Worksheet	Add t Worksheet V			we As Chi								
Summary	Price Br	xok 🗌	Chart	Rep	arts	Address	Pr	ofit	Inflation			
Ay Jobs \ Job : ist of Items in th heet Name		Sanitaryv Remarks		Tracker	Range . Total Cos	а. К	No. of Items		Commer	nts .		
andard Basin igh Spec Basin andard Close Cou gh Spec Close Cou			Batt	room 1 room 1 room 1 room 1	6 6 6 6	128-21	1.000		Cost of se Cost of se	etting 'No. of It etting 'No. of It etting 'No. of It etting 'No. of It	ems' to 1 is £ ems' to 1 is £	300.21 198.50
marke					<u>e</u>	326.71						

[21] Set the **No. of Items** for a **Standard Basin** and a **Standard Closed Coupled WC** to *1* to include them in the estimate.

If you wish to review the materials and labour being included in either of these items you can select the **Worksheet** and press **Open Worksheet** to launch the **Resource Wizard**.



[22] We have now selected our sanitaryware items so click Close to return to the Job Summary screen.

[23] Click Yes when asked 'Is this Workbook now Complete?'

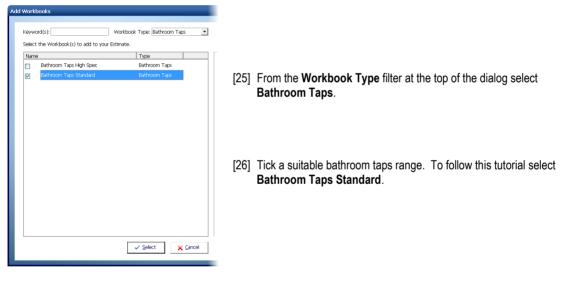
EstimatorXpress			
🕐 Is thi	s Workbook no	w complete?	
	<u>(es</u>	No	

Close Open Workbook	Add Delete Workbook Workbook	Recalc Save Estimate		PlansXpres awing	order Workbooks				
Summary	Price Book	Chart	Rec	orts	Address		Profit	Inflat	ion
My Jobs \ Job 8	Summary								
Workbook Name		Remarks	. т	otal Cost	Comments	•	Linked to Spec?	Complete?	Last opened
	ontal Copper End Feed cal Copper End Feed d 15mm Poings ings Copper Microbore Plastic Microbore mm		£ £ £	1,467.85 112.36 18.73 15.59				Completed Completed Completed Completed	18/01/2011 11:22 18/01/2011 11:24 18/01/2011 11:25 18/01/2011 11:25
adiator Tails 15mm			£	335.67				Completed	18/01/2011 11:36
hasing Walls + Double Panel Rad ipe Install Horizonta ipe Install Vertical PI hower Price Tracker iol Pipe Vaste Pice Install 32	l Plastic astic Moor		£	770.95				Completed	18/01/2011 11:28
Sanitaryware Price Ti Sanitaryware Price Ti			É É	262.68 326.71				Completed Completed	18/01/2011 13:03 18/01/2011 13:08
to of Items 22		Sub To (ex VAT & Pro		3,310.53					

You will now see a final estimate cost for your **Price Tracker Sanitaryware Workbook** on the **Job Summary** screen with a sub-total of all the work we've priced.



[24] Next we are going to choose our taps for the basin and the bath. Depending on which merchant partner(s) you have subscribed to you will have a varying number of bathroom taps Workbooks in your system. To subscribe to any of our merchant partners ring HBXL on 0845 1234 085. To choose a range of bathroom taps to use to use click Add Workbook.



[27] Referring to steps 20-23 if required, go into the Bathroom Taps Standard Workbook and select one Basin Taps Pair and one Bath Taps Pair. Each pair of bathroom taps has copper pipes included to fix to the main water feed. We will estimate the main feed to the bathroom in the Pipe Install Horizontal Plastic and Pipe Install Vertical Plastic Workbooks.



[28] To complete estimating our new bathroom select the **Shower Price Tracker Mixer Workbook** and click **Open Workbook**.

Open Workbook

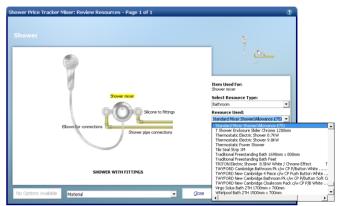


- [30] The Resource Wizard will be automatically loaded. By clicking on the different descriptions around the picture you can see which resources are specified and what quantities of each resource have been included in your estimate.
- [31] By clicking on Shower mixer you can see that an allowance of £75 has been allowed for our shower. Let's now specify a different shower unit that costs £120. Click on the Resource Used dropdown to see if there is a suitable alternative. There isn't currently so we shall add a new shower into our Price Book.
- [32] Click the right mouse button over the description of the currently selected shower and select Add Resource from the menu that pops up.

New Resource	2
Description: Chrome Shower Mixer	
Code: 3820141801113	
Unit Cost (£): 120	
Discount (%):	
Adjustment (%):	
Net Purchase Cost: £120.00	
Units of Purchase: EA	
Supplier/Contractor: HBXL Price Tracker	
Type: Bathroom 💌 🔹	
Delivery (Weeks): 6	
Payment (Weeks): 5	
Comments/Code:	
Last Updated: 18/01/2011	
VAT (%):	
Wastage (%): 7.5	
j Clear ✓ QK 🗙 Çancel	

Material	•
Material	
Labour, Plant, Subcontract & Sundry	

[29] We require one standard mixer shower but let us first check what is included in the way of connections for the shower. Select the Standard Mixer Shower Worksheet and press Open Worksheet.

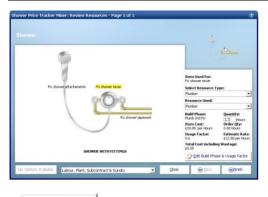


- [33] In the New Resource dialog box change the description to Chrome Shower Mixer and change the Unit Cost to 120. Once you have reviewed the other fields and changed any you wish, click OK.
- [34] The Edit Resource dialog box now pops up for you to confirm the product change to your new shower. Review the information in the dialog then click **OK** to confirm your selection.

Close Open Worksheet	Add Copy Worksheet Worksh	Delete		inge				
Summary	Price Book	Chart	Repo	orts	Address	Profit	Inflation	
My Jobs \ Job S List of Items in thi Sheet Name				. Total Co	st No.	of Items	Comments	
Standard Mixer Show Digital Mixer Shower	er		Bathroom 1	£	185.55	1.000		ng 'No. of Items' to 1 is £480.55
			Bathroom 1	6				

[35] We will now review the labour being allowed to fit the shower unit. You should always consider the labour time being allowed when swapping a material. From the Resource Dropdown at the bottom of the Resource Wizard select Labour, Plant, Subcontract & Sundry.

### 62 Tutorial - Bathroom



- [36] If **Fix shower mixer** isn't already highlighted in yellow, click on it with your mouse.
- [37] On the right hand side you can see that a quantity of 1 hour has been allowed. Click in the box and change this to 1.5.

<u>C</u>lose

[38] Click Close to close the Resource Wizard.

[39] You will notice that there is still no price appearing against the Total Cost marker. That is because we haven't set the quantity required. Change the No. of Items to 1 and the price will appear.

Close Change Edi Resource Resor		Resources Wizard	rs T	Address	Profit		Inflati	00			
	mary \ Shower Price Trad					25	1 1100	an i			
No. of Items		00									
Total Cost	£ 185.	5									
Item used for:	Mr Phillips Description	Purchase	Purchase	Build Phase	Production/ Usage Factor	Es	timate Rate	Unit	Waste Factor	Type Resource	Quantity Per Iten
Shower mixer	Chrome Shower Mixer	EA		Plumb 2nd Fix	1.00000	£	120.00	EA	7.50%	Bathroom Material	1.00
Shower pipe connections	15mm Copper Tube	EA		Plumb 2nd Ftx	1.00000	£	1.60	EA	7.50%	Plumbing Material	4.00
Elbows for connections	Copper End Feed Elbow 15mm			Plumb 2nd Fix	1.00000	£	0.30	EA		Copper Fittings Material	4.00
Silicone to fittings	All Purpose Silicone White 0.31Litr	E/		Plumb 2nd Fix	0.10000	£	0.35	EA		Sundry Material Material	1.00
Fix shower mixer	Plumber	Hours		Plumb 2nd Fix	0.60000	£		Hours	0.00%	Plumber Labour	1.50
Fix shower attachements		Hours		Plumb 2nd Fix	0.50000	£		Hours	0.00%	Plumber Labour	1.00
Rx shower pipework	Plumber	Hours	£ 20.00	Plumb 2nd Fix	1.00000	£	20.00	Hours	0.00%	Plumber Labour	1.00
Location	Bathroom 1		No.		7						



[40] Click Close to return to the Summary Shower Price Tracker Mixer Workbook.

Close

Close Open Add Worksheet Workshee	Copy t Worksheet	Delete Norksheet	Save As C	hange cation				
Summary Price	Book )	Chart	Rej	parts	Address	Profi	: Inflation	
My Jobs 🔪 Job Summary	\ Shower	Price Tra	cker Mixer					
List of Items in this workbor Sheet Name	Remarks		ocation	. Tota	l Cost	No. of Items	Comments	
Randard Mixer Shower Jigital Mixer Shower			lathroom 1	£	185.55	1.000		ing 'No. of Items' to 1 is £480.55
agramicer shower	-	E	achroom 1	£			Lost of sett	ing %o. of Items to 1 is £480.55
				£	185.55			
Remarks								

100

- [41] To return back to the Job Summary, press the Close Workbook button. This will automatically save your Shower Price Tracker Mixer Workbook.
- [42] A dialog box pops up asking if the item is now complete. Click Yes.

Is this Workbook now complete?	EstimatorXpress
Yes No	Is this Workbook now complete?
	Yes <u>N</u> o

Close Open Workbook	Add Delete Workbook Workbook			NansXpres wing	s Order Workbooks			
Summary	Price Book	Chart	Rep	orts	Address	Profit	Inflat	ion
My Jobs \ Job S	ummarv							
Workbook Name		Remarks .	To	ital Cost	Comments	Linked to Spec?	Complete?	Last opened
Gas Pipe Install Vertic: Copper Pipe End Feed Plastic Pipe 15mm Fixi Radiator Tails 10mm C Radiator Tails 15mm P Shower Pump Waste Pipe Fixings Waste Pipe Install 400 Outside Tap	ntal Copper End Feed al Copper End Feed 15mm Fixings ngs opper Microbore lastic Microbore		£ £ £	1,467.85 112.36 18.73 15.59			Completed Completed Completed Completed	18/01/2011 11:22 18/01/2011 11:24 18/01/2011 11:25 18/01/2011 11:27
Pipe Install Vertical Co Radiator Tails 15mm C			£	335.67			Completed	18/01/2011 11:36
Chasing Walls P+ Double Panel Radii Pipe Install Horizontal Pipe Install Vertical Pla	Plastic		£	770.95			Completed	18/01/2011 11:28
Shower Price Tracker   Soil Pipe Waste Pipe Install 32n	Mixer		£	185.55			Completed	18/01/2011 14:25
Bath Standard Sanitaryware Price Tri Bathroom Taps Standi *	acker Range		E E	262.68 326.71 83.00			Completed Completed Completed	18/01/2011 13:03 18/01/2011 13:08 18/01/2011 14:17
No of Items 23 Remarks		Sub Total (ex VAT & Profit)		3,579.07				

 If you wish to stop and close this current Estimate:

 1. Press the Close button on the top left of the Job Summary screen.

 2. You are transferred to the My Jobs screen. Close this screen also using the Close button.

 3. You are now in the Main Menu Screen. To close EstimatorXpress® press the Exit button in the top right of screen.

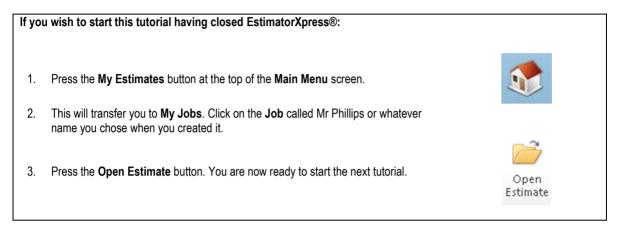
[43] You have now priced up for all of the bathroom items and the **Job Summary Screen** has the total price of all items costed up to this point.

## SOIL PIPE & WASTE CONNECTIONS

15.00 Minutes

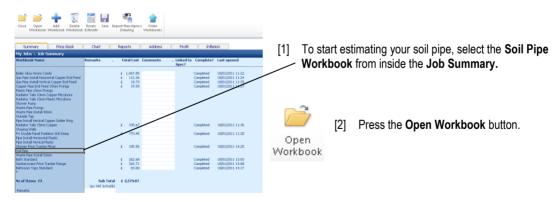
If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

If you have joined this tutorial after having closed EstimatorXpress®, see the following steps.



This tutorial leads you through estimating the soil pipe and waste connections of our new bathroom. This will involve putting in the new soil pipe, estimating for the waste pipe to the sink and bath, and finally any waste pipe fixings required. Let's start by estimating for the **Soil Pipe**. As you will see from the plans, on page 20, the soil pipe is concealed within the building and will run up to the back of the bathroom with an air admittance valve on top.

The **Soil Pipe Workbook** is an example of a **Workbook** with a **Dimensions Wizard** to which you add any **Sundry items** that you require. (See page 16 for an explanation of this.) The **Soil Pipe Workbook** allows you to enter the quantities of all the common fixings that may be required plus there is a sundry area for if you need to enter any special fixings that are not given as an option by default.

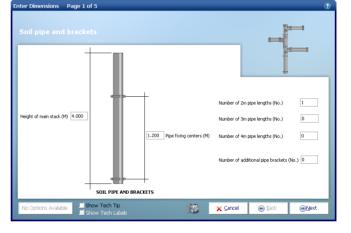




📝 Edit 🗙 <u>C</u>ancel

- [3] You are now transferred to the Summary of Drain Runs Workbook and a dialog box will automatically pop up asking you to name and give a location for the soil stack.
- [4] Enter Soil Stack as a name for this Worksheet and then select Bathroom 1 for location. Click OK.
- [5] Select the dimensional template Typical Stack with Air Admittance Valve and click Select.

[6] The **Dimensions Wizard** automatically pops up. On page one, enter a Height of main stack of 4. We will also require one '2m length of pipe' to connect through the wall to the toilet outlet. Set Number of 2m pipe lengths to 1.

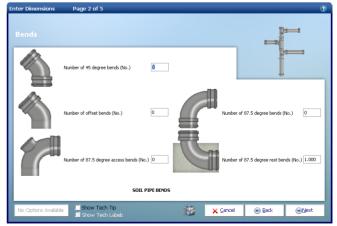


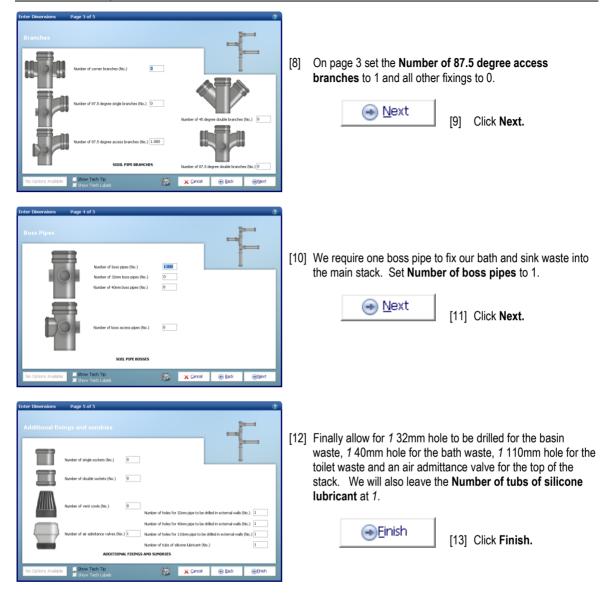
Click Next.

Next

[7] On page 2 of the wizard we need a rest bend for connecting in to the drainage system. Set Number of 87.5 degree rest bends to 1 and all other fixings to 0.







NOTE: If you wish to review the output from the **Worksheet** to find out how the total cost has been arrived at you can use the **Resource Wizard** or click **View Resources Output**.

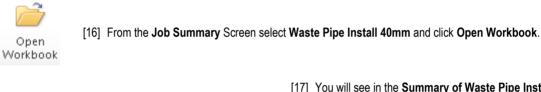
[14]

[14] Press the Close button to return to the Summary of Soil Pipe Workbook.

Close

				awing	Workbooks			
Summary	Price Book	Chart	Rep	oorts	Address	Profit	Inflat	ion
My Jobs \ Job Summ	ary							
Workbook Name		Remarks .	. T	otal Cost	Comments	<ul> <li>Linked to Spec?</li> </ul>	Complete?	Last opened
Boiler Glow-Worm Combi			£	1,467.85			Completed	18/01/2011 11:2
Gas Pipe Instal Horizontal O	coper End Feed		Ē	112.36			Completed	18/01/2011 11:2
Gas Pipe Install Vertical Cop			£	18.73			Completed	18/01/2011 11:2
Copper Pipe End Feed 15m			£	15.59			Completed	18/01/2011 11:2
Plastic Pipe 15mm Fixings								
Radiator Tails 10mm Copper								
Radiator Tails 15mm Plastic	Microbore							
Shower Pump								
Waste Pipe Fixings								
Waste Pipe Install 40mm								
Outside Tap								
Pipe Install Vertical Copper								
Radiator Tails 15mm Coppe			£	335.67			Completed	18/01/2011 11:3
Chasing Walls								
P+ Double Panel Radiator 6			£	770.95			Completed	18/01/2011 11:2
Pipe Install Horizontal Plasti	c							
Pipe Install Vertical Plastic								
Shower Price Tracker Mixer			£	185.55			Completed	18/01/2011 14:2
Soil Pipe			£	489.64			Completed	18/01/2011 14:3
Waste Pipe Install 32mm Bath Standard							e	101010011100
			E E	262.68			Completed	18/01/2011 13:0
Sanitaryware Price Tracker Bathroom Taps Standard	Kange		÷.	326.71 83.00			Completed Completed	18/01/2011 13:0 18/01/2011 14:1
*			Ł	83.00			Completed	10/01/2011 14:1
No of Items 23		Sub Tota	- L	4,068.71				

Next we'll estimate for the waste pipe connecting the bath to the soil pipe. When we estimated for our bath we included a waste trap so we just need to allow for some 40mm pipe to connect it to the boss pipe that we've just estimated.





[15] Press the Close button to return to the Job

your Job Sub Total.

Summary Screen. Answer 'Yes' when asked if the Workbook is now complete. You will see that the price from your Soil Pipe Workbook has been copied to the Summary Screen and included in

- [17] You will see in the Summary of Waste Pipe Install 40mm Workbook that there is already a Worksheet set up for estimating a length of waste pipe. This includes the pipes and brackets together with the labour to fit them. If you wish to check this detail you can click on Open Worksheet to review the resources included using the Resource Wizard.
- [18] Set the **Length of Pipe** to 4 to allow 4m of pipework to get from our bath waste to the soil pipe outside.



[19] Press **Close** button to return to the **Job Summary Screen**.

[20] Now repeat these steps to allow for 1.5m of 32mm waste pipe for the basin waste using the **Waste Pipe Install 32mm Workbook**. [21] Finally we will allow for any waste fixings required. Select the Waste Pipe Fixings Workbook and press Open Workbook.

> The Waste Pipe Fixings Workbook is a Workbook with a dimensions section allowing you to enter the quantities of each fixing required, and a sundry area to add in for any additional fixings that aren't covered in the Workbook as standard.

Close Open Add Delete Workbook Workbook Workbook		port PlansXpres Drawing	s Order Workbooks		
Summary Price Book	Chart	Reports	Address	Profit	Inflation
My Jobs \ Job Summary					
Workbook Name	Remarks .	Total Cost	Comments .	Linked to Com Spec?	plete? Last opened
Boler Glow-Worm Combil Gas Pipe Install Horitoxhall Copper End Feed Copper Pipe End Feed Tsmm Fixings Radiator Talis Itsmm Fastings Radiator Talis Itsmm Pastic Microbore Shower Pains Waste Pipe Install Simm Opper Microbore Shower Pixer Simm Copper Solder Ring Radiator Talis Itsmm Copper Solder Ring Radiator Talis Itsmm Copper Chasing Walis Radiator Talis Itsmm Copper Chasing Walis Pipe Install Vertical Plastic Pipe Install Vertical Plastic Pipe Install Vertical Plastic Pipe Install Vertical Plastic Solwer Price Tradker Mixer Sol Pipe Bath Sondard Sankaryware Price Tracker Range Bathroom Taps Standard	1	<ul> <li>€ 1,467,65</li> <li>€ 112,36</li> <li>€ 112,37</li> <li>€ 18,73</li> <li>€ 18,73</li> <li>€ 15,59</li> <li>€ 19,47</li> <li>€ 335,67</li> <li>€ 770,95</li> <li>€ 185,55</li> <li>€ 489,64</li> <li>€ 236,71</li> <li>€ 33,00</li> </ul>		Compli Compli Compli Compli Compli Compli Compli Compli Compli Compli	sted         18/01/2011 11:24           18/01/2011 11:25         18/01/2011 11:25           sted         18/01/2011 11:27           sted         18/01/2011 11:27           sted         18/01/2011 11:36           sted         18/01/2011 11:36           sted         18/01/2011 11:36           sted         18/01/2011 11:28           sted         18/01/2011 11:28           sted         18/01/2011 14:32           sted         18/01/2011 14:32           sted         18/01/2011 14:08
No of Items 23 Remarks	Sub Total (ex VAT & Profit)	£ 4,088.17			

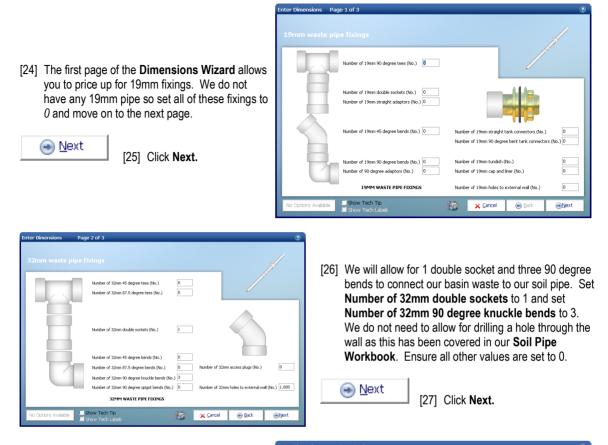
**1** 

2

EstimatorXpr	ess	
Enter a W	/orksheet name for this Waste Pip	ae Fixings.
Name	Waste Fixings	✓ <u>O</u> K
Location	Bathroom 1 🔹 🔹	Concol
		X Cancel
		_

- [22] You are transferred to the **Summary of Waste Pipe Fixings Workbook** and a dialog box pops up asking for a name and a location for the first **Worksheet** in the **Workbook**. Enter a **name** of *Waste Fixings* and a **location** of *Bathroom 1*.
- [23] A dialog now pops up asking to pick a dimensional template. Select Typical *Bathroom Waste* and press **Select**.

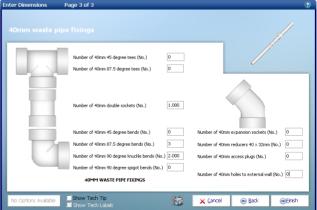
EstimatorXpress	
Select a Dimensional Template, or clic your own.	k Edit to create
Typical Bathroom Waste Typical Cloakroom Waste Typical Overflow Waste	✓ <u>S</u> elect
	X Cancel



[28] Similarly for 40mm fixings we will allow for 1 double socket and three 90 degree bends to connect our bath waste to our soil pipe. Set Number of 40mm 90 degree knuckle bends to 3. We do not need to allow for drilling a hole through the wall as this has been covered in our Soil Pipe Workbook. Ensure all other values are set to 0.

[29] Click Finish.

🗩 Finish

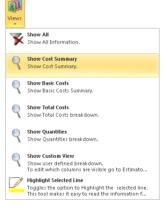




[30] Before you press the Close button to return to the Summary of Waste Pipe Fixings Workbook, you might want to view the output of your Waste Pipe Fixings Workbook by clicking on View Resources Output button.

	Chart Reports	Address	Profit	Inflation										A	
	aste Pipe Fixings \ Waste Fixings -		e Fixings - Resour	ces									<u> </u>	🍦 Help	& Supp
io. of Groups of Items	1.00														
fotal Cost of Groups	£ 75.26														
	Mr Phillips	Purchase Pu	chase Build	Production/	Fetin	mate		Waste		Quantity	Total	Cost	Wastage	Total	
Item used for:	Description	Unit	Cost Phase	Usage Factor				Factor	Type Resource		Quantity	COSC	Cost	Cost	Quanti
9mm double sockets	Waste Pipe Double Socket 19mm	EA E	1.70 Plumb 2nd Fix	1.00000		1.70	No.	7.50%	PVC-u Soil Waste Material	- rer teem	Quantity	£ .	£	£	Quune
9mm 90 degree bends	Waste Pipe Bend 90deg 19mm	EA E	1.60 Plumb 2nd Fix	1.00000		1.60	No.					ê.	÷ ·	÷ .	
9mm 45 degree bends	Waste Pipe Bend 45deg 19mm	FA F	2.00 Plumb 2nd Fix	1.00000		2.00	No.	7.50%	PVC-u Soil Waste Material			÷ ·	ê -	÷ .	
9mm 90 dearee tees	Waste Pipe Tee 19mm	FA F	2.20 Plumb 2nd Fix	1.00000	ē.	2.20	No.	7.50%	PVC-u Soil Waste Material	-		ē -	£ -	2.1	
9mm straight tank connectors	Waste Pipe Straight Tank Connector 19mm	EA E	2.60 Plumb 2nd Fix	1.00000		2.60	No.	7.50%	PVC-u Soil Waste Material	-		ē -	£ -	2.1	
9mm 90 degree bent tank connectors	Waste Pipe Bent Tank Connector 19mm	EA E	2.90 Plumb 2nd Fix	1.00000		2.90		7.50%	PVC-u Soil Waste Material	-		ē -	£ -	÷ .	
9mm cap and liner	Waste Pipe Cap and Liner 19mm	EA E	2.40 Plumb 2nd Fix	1.00000	£	2.40	No.	7.50%	PVC-u Soil Waste Material	-		÷ -	£ -	÷ -	
9mm straight adaptors	Waste Pipe Straight Adaptop 19mm	EA £	1.80 Plumb 2nd Fix	1.00000	£	1.80	No.	7.50%	PVC-u Soil Waste Material	-		£ -	£ -	÷ -	
9mm 90 degree adaptors	Waste Pipe Adaptor 90deg 19mm	EA £	2.10 Plumb 2nd Fix	1.00000	£	2.10	No.	7.50%	PVC-u Soil Waste Material	-		£ -	£ -	£ -	
9mm tundish	Waste Pipe Tundish 19mm	EA £	9.00 Plumb 2nd Fix	1.00000	£	9.00	No.	7.50%	PVC-u Soil Waste Material	-	-	£ -	£ -	£ -	
2mm double sockets	Waste Pipe Double Socket 32mm	EA £	2.40 Plumb 2nd Fix	1.00000	£	2.40	No.	7.50%	PVC-u Soil Waste Material	1.000	1.000	£ 2.40	£ 0.18	£ 2.58	
2mm 45 degree bends	Waste Pipe Bend 45deg 32mm	EA £	3.30 Plumb 2nd Fix	1.00000	£	3.30	No.	7.50%	PVC-u Soil Waste Material	-		£ -	£ -	£ -	
2mm 87.5 degree bends	Waste Pipe Bend 87.5deg 32mm	EA £	4.30 Plumb 2nd Fix	1.00000	£	4.30	No.	7.50%	PVC-u Soil Waste Material	-		£ -	£ -	£ -	
2mm 90 degree knuckle bends	Waste Pipe Knucle Bend 90deg 32mm	EA £	3.50 Plumb 2nd Fix	1.00000	£	3.50	No.	7.50%	PVC-u Soil Waste Material	3.000	3.000	£ 10.50	£ 0.79	£ 11.29	
2mm 90 degree spigot bends	Waste Pipe Spigot Bend 90deg 32mm	EA £	4.50 Plumb 2nd Fix	1.00000	£	4.50	No.	7.50%	PVC-u Soil Waste Material	-		£ -	£ -	£ -	
2mm 87.5 degree tees	Waste Pipe Tee 87.5deg 32mm	EA £	5.60 Plumb 2nd Fix	1.00000	£	5.60	No.	7.50%	PVC-u Soil Waste Material	-	-	£ -	£ -	£ -	
2mm 45 degree tees	Waste Pipe Tee 45deg 32mm	EA £	5.70 Plumb 2nd Fix	1.00000		5.70	No.	7.50%	PVC-u Soil Waste Material	-		£ -	£ -	£ -	
2mm access plugs	Waste Pipe Access Plug 32mm	EA £	3.50 Plumb 2nd Fix	1.00000		3.50	No.	7.50%	PVC-u Soil Waste Material	-		£ -	£ -	£ -	
Omm double sockets	Waste Pipe Double Socket 40mm	EA £	3.00 Plumb 2nd Fix	1.00000		3.00			PVC-u Soil Waste Material	1.000	1.000	£ 3.00	£ 0.23	£ 3.23	
Omm reducers 40 × 32mm	Waste Pipe Reducer 40mm x 32mm	EA £	2.20 Plumb 2nd Fix	1.00000		2.20	No.	7.50%	PVC-u Soil Waste Material	-		£ -	£ -	£ -	
Omm expansion sockets	Waste Pipe Expansion Socket 40mm	EA £	5.20 Plumb 2nd Fix	1.00000		5.20			PVC-u Soil Waste Material	-	1.1	£ -	£	£ 5	
0mm 45 degree bends	Waste Pipe Bend 45deg 40mm	EA £	3.70 Plumb 2nd Fix	1.00000		3.70	No.		PVC-u Soil Waste Material			£ -	£ -	£ -	
Omm 87.5 degree bends	Waste Pipe Bend 87.5deg 40mm	EA £	5.20 Plumb 2nd Fix	1.00000		5.20	No.	7.50%	PVC-u Soil Waste Material	3.000		£ 15.60	£ 1.17	£ 16.77	-
0mm 90 degree knuckle bends	Waste Pipe Knucle Bend 90deg 40mm	EA £	4.10 Plumb 2nd Fix	1.00000		4.10				2.000	2.000	£ 8.20	£ 0.62	£ 8.82	2
0mm 90 degree spigot bends	Waste Pipe Spigot Bend 90deg 40mm	EA £	5.50 Plumb 2nd Fix	1.00000		5.50	No.	7.50%	PVC-u Soil Waste Material	-	-	£ -	£ -	£ -	
0mm 87.5 degree tees	Waste Pipe Tee 87.5deg 40mm	EA £	6.40 Plumb 2nd Fix	1.00000		6.40			PVC-u Soil Waste Material	-	-	£ -	£ -	£ -	
10mm 45 degree tees	Waste Pipe Tee 45deg 40mm	EA £	6.50 Plumb 2nd Fix	1.00000		6.50	No.			-	-	£ -	£ -	£ -	
Omm access plugs	Waste Pipe Access Plug 40mm	EA £	3.40 Plumb 2nd Fix	1.00000		3.40			PVC-u Soil Waste Material	-		£ -	£ -	£ -	
Drill bit for 19mm pipe holes	Diamond Core Drill Bit 28mm × 300mm		97.00 Plumb 2nd Fix	0.05000		4.85			Bonded Abrasives Material			± -	± -	± -	
Drill bit for 32mm pipe holes	Diamond Core Drill Bit 38mm × 150mm		10.00 Plumh 2nd Fix	0.05000		5.50			Bonded Abrasives Material	1.000	1.000	£ 5.50	£ 0.41	£ 5.91	

[31] Use the **Views** drop-down menu in the **Resources Output** screen to view the costs and quantities of materials and required to fit the **Waste Pipe Fixings.** 





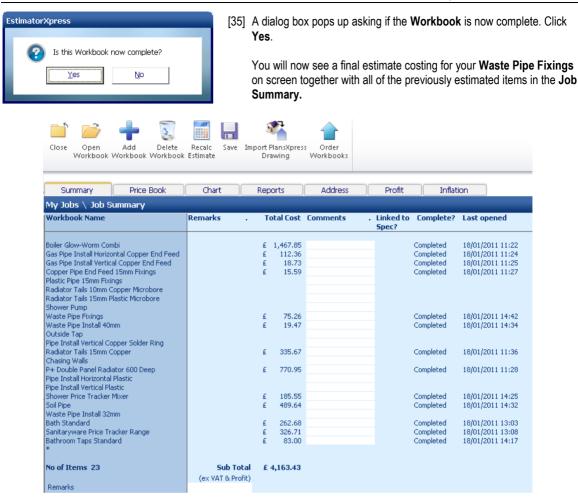
[32] Assuming you are satisfied with the output, press the **Back** button to return to **Waste Pipe Fixings Worksheet Dimensions** screen.



[33] Press the Close button to return to the Summary of Waste Pipe Fixings Workbook.



[34] Now to return to **Job Summary**, press the **Close** button. This will automatically save your **Waste Pipe Fixings Workbook**.



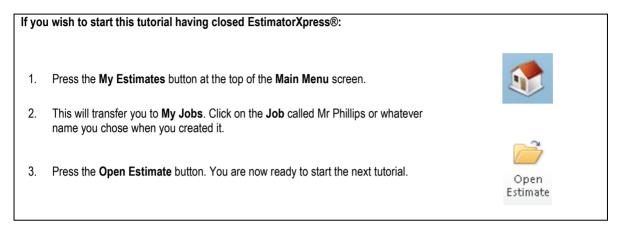
If you wish to stop and close the current estimate:					
1.	Press the Close button at the top left of the Job Summary screen.	Close			
2.	You are transferred to the <b>My Jobs</b> screen. Close this screen also using the <b>Close</b> button.	Close			
3.	You are now in the <b>Main Menu</b> Screen. To close <b>EstimatorXpress</b> ® press the <b>Exit</b> button in the top right of the screen.	×			

### **PIPE WORK**

10.00 Minutes

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

If you have joined this tutorial after having closed EstimatorXpress®, see the following steps.



This tutorial leads you through the estimating of the water pipes feeding the radiators and the bathroom from the new boiler. **EstimatorXpress**® contains **Workbooks** for estimating copper, plastic, copper microbore or plastic microbore pipes. For this example we are going to use plastic pipes. We will estimate for horizontally laid pipes, vertically laid pipes, allow for some of the vertical pipes to be chased into existing walls then cover any pipe fixings.

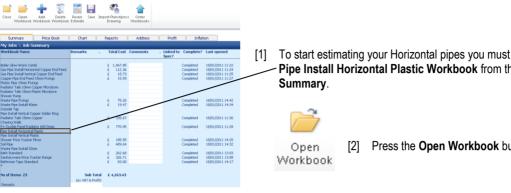
Referring to our plans, on page 20, you will see that there are 22mm pipes running up the side wall of the extension to the first floor to feed the radiators which split down to 15mm once they are in the bathroom. Similarly there are 22mm pipes that run back down a boxed-in concrete wall to feed the ground floor radiators which then split up into 15mm pipes to feed and return. This gives us the following pipe work:

22mm Horizontal Plastic	2 x 2.5m runs in concrete floors = 5m
22mm Vertical Plastic	2 x 2m in concrete = 4m & 2 x 2m in stud wall = 4m
22mm Vertical Copper	2 x 1.5m surface mounted = 3m
15mm Horizontal	35m in a timber floor & 35m in a concrete floor

Similarly looking at the feed for the bathroom hot water, we have a 22mm pipe running from the boiler outlet to the side wall of the extension then up that wall to the bathroom. From there it has a 22mm pipe feeding the bath with a reducing tee feeding the sink on its way past. This will give us the following:

22mm Horizontal Plastic	2.5m runs in concrete floors & 4.5m in timber floor
22mm Vertical Plastic	2m in stud wall
22mm Vertical Copper	1.5m surface mounted

From these quantities we can now go ahead and estimate for all of our pipe runs.



EstimatorXpress® then transfers you into the [3] Summary of Pipe Install Horizontal Plastic Workbook.

The Summary of Pipe Install Horizontal Plastic Workbook is used to list the range of plastic pipe Worksheets that you may have within your estimate such as 15mm Plastic in Channel or 22mm Plastic in Stud Wall. Each different size or installation type of pipe must be estimated separately and is listed in this screen. From our calculations above we can estimate for our horizontal pipes.

- [4] Enter a Length of Pipe for 15mm Plastic in Concrete of 35.
- [5] Enter a Length of Pipe for 15mm Plastic Timber Floor of 38.
- [6] Enter a Length of Pipe for 22mm Plastic in Concrete of 7.5.
- [7] Enter a Length of Pipe for 22mm Plastic in Timber Floor of 4.5.

NOTE: To confirm the material and labour resources being used in any of these Worksheets you can highlight the Worksheet and press Open Workbook to load the Resources Wizard for that Worksheet.

To start estimating your Horizontal pipes you must select the Pipe Install Horizontal Plastic Workbook from the Job

Press the Open Workbook button.

	2	+		2	
Close	Open Worksheet	Add Worksheet	Copy Worksheet	Delete Worksheet	Change Location

Summary	Price Book	Chart	Reports	Address	Profit	Inflation	
My Jobs \ Job S	Summary \ Pipe In	stall Horizontal F	lastic				
ist of Items in th sheet Name	is workbook Remar	ks . Locatio	n . Total	Cost	Length of Pipe	Comments	
Smm Plastic Timber I		House	£	155.42	38.000		ength of Pipe' to 1 is £4.09
Smm Plastic in Stud		House	£			Cost of setting 'L	ength of Pipe' to 1 is £5.51
Smm Plastic In Loft :		Loft	£				ength of Pipe' to 1 is £4.58
Smm Plastic In Char		House	£				ength of Pipe' to 1 is £3.04
Smm Plastic in Conc		House	£	145.25	35.000		ength of Pipe' to 1 is £4.15
2mm Plastic Timber I		House	£	23.73	4.500		ength of Pipe' to 1 is £5.27
2mm Plastic in Stud		House	£				ength of Pipe' to 1 is £6.69
2mm Plastic in Loft 5		Loft	£				ength of Pipe' to 1 is £5.8
2mm Plastic in Conc		House	£	41.45	7.500		ength of Pipe' to 1 is £5.5
2mm Plastic in Chan		House	£				ength of Pipe' to 1 is £4.2
8mm Plastic Timber I		House	£				ength of Pipe' to 1 is £6.77
8mm Plastic in Stud		House	£				ength of Pipe' to 1 is £8.19
8mm Plastic in Loft 5		Loft	£				ength of Pipe' to 1 is £7.78
8mm Plastic In Conc		House	£				ength of Pipe' to 1 is £8.01
8mm Plastic in Chan	nel	House	£	-		Cost of setting 'L	ength of Pipe' to 1 is £5.72
			£	365.84			
Remarks							

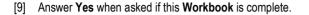


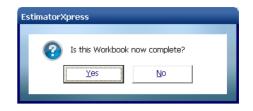
Summary Price B	xok Chart	Reports	Addres	s Profit	t Inflation
My Jobs \ Job Summary \	Pipe Install Horiz	ontal Plastic			
List of Items in this workbook Sheet Name	Remarks .	Location . 1	Total Cost	Length of Pipe	Comments .
I Sam Readit: Tinder Floor Sism Readit: In Stud Wall Sism Readit: O Lahroid Sism Readit: O Lahroid Sism Readit: In Concrete Zam Readit: In Lahroid Zam Readit: In Lahroid Floor Zam Readit: In Lahroid Floor Zam Readit: In Charnel Zam Readit: In Lahroid Wall Zam Readit: In Lahroid Wall Zam Readit: In Lahroid Wall Zam Readit: In Charnel Zam Readit: In Concrete Zam Readit: In Concrete Zam Readit: In Concrete Zam Readit: In Charnel		fouse 6 fouse	155.42 145.25 23.73 41.45	30.000 - - 35.000 4.500 - - - - - - - - - - - - - - - - - -	Cost of setting `Length of Pape' to 1 is 6.5. Cost of setting `Length of Pape' to 1 is 6.5. Cost of setting `Length of Pape' to 1 is 6.5. Cost of setting `Length of Pape' to 1 is 6.5. Cost of setting `Length of Pape' to 1 is 6.5. Cost of setting `Length of Pape' to 1 is 6.5. Cost of setting `Length of Pape' to 1 is 6.5. Cost of setting `Length of Pape' to 1 is 6.5. Cost of setting `Length of Pape' to 1 is 6.5. Cost of setting `Length of Pape' to 1 is 6.5.



Now to return to the Job Summary, press the Close button. This will automatically save your Pipe [8] Install Horizontal Plastic Workbook.

Close





Now we'll go through exactly the same process for the vertical pipes.



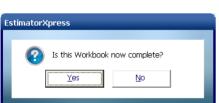
[10] Select the Pipe Install Vertical Plastic Workbook and press the Open Workbook button.

Again we have a list of all of the typical sizes and installation types of pipe at our disposal. If you needed to use a 32mm pipe you can select a 28mm pipe **Worksheet** then use the **Copy Worksheet** button in order to use it as a template. From there you will only need to change the resources such as the pipe and clips and review the amount of labour allowed to fit each metre of pipe.

- [11] Enter a Length of Pipe for 22mm Plastic in Stud Wall of 6.
- [12] Enter a Length of Pipe for 22mm Plastic in Concrete of 4.



[13] Now to return to the Job Summary, press the Close button. This will automatically save your Pipe Install Vertical Plastic Workbook.



 Workhest Workhest Workhest Workhest Teispite Leader

 Surmary
 Proc Bock
 Out
 Reports
 Address
 Profit
 Inflation

 My blobs, bob Summary, Y Proc Bock
 Out
 Reports
 Address
 Profit
 Inflation

 My blobs, bob Summary, Y Proc Bock
 Out
 Reports
 Address
 Profit
 Inflation

 Total driver inflation
 Inflation
 Inflation
 Inflation
 Inflation
 Inflation

 Stam Route, Doctore
 France Inflation
 Inflation
 Inflation
 Inflation
 Inflation

 Stam Route, Doctore
 France Inflation
 France Inflation
 Inflation
 Inflation
 Inflation

 Stam Route, Doctore
 France Inflation
 France Inflation
 Inflation
 Inflation
 Inflation

 Stam Route, Doctore
 France Inflation
 France Inflation
 Inflation
 Inflation
 Inflation

 Stam Route, Doctore
 France Inflation
 France Inflation
 Inflation
 Inflation
 Inflation

 Stam Route, Doctore
 France Inflation
 France Inflation
 Inflation
 Inflation</t

[14] Answer Yes when asked if this Workbook is complete.

Finally there are some wall mounted copper pipes that run from the concrete floor up to the boiler at a height of 1.5m. We do not currently have a suitable **Workbook** to price up this work so we will need to get one from the library.



[15] Press the Add Workbook button to make the Add Workbook dialog box pop up.

Add Workbooks Keyword(s): Workbook Type: Water Connections  Select the Workbook(s) to add to your Estmate.	
Name         Type           Poe Install Horizontal Copper End Feed         Water Connections           Pipe Install Horizontal Copper Solder Ring         Water Connections           Poe Install Verbual Copper End Feed         Water Connections	<ul> <li>[16] From the Workbook Type filter box at the top of the dialog, select Water Connections.</li> <li>[17] Now select the Pipe Install Vertical Copper End Feed Workbook.</li> </ul>
✓ Select X Cancel	Select [18] Press Select.

[19] Following the previous steps if necessary for guidance, open up the Pipe Install Vertical Copper End Feed Workbook and allow for 6m of 22mm Copper Surface Mount pipe then close the Workbook and mark it as complete.

	Close Open Add Delete Workbook Workbook	Recale: Save Import Planskyress Order Drawing Workbooks	Profit Inflation
	My Jobs \ Job Summary		
	Workbook Name	Remarks . Total Cost Comments	. Linked to Complete? Last opened Spec?
[20] With the previous step complete, your Job Summary Screen should look like this.	Baller Glow-Warm Canbi Gas Pipe Install Horizontal Copper End Feed Gas Pipe Install Vertical Copper End Feed Copper Pipe End Feed ISmm Fixings Plastic Pipe ISmm Foings Radiator Tails ISmm Foings Market Microbore Shower Pixe Fixings Watte Pipe Fixing Development Face Solder Ring Radiator Tails ISmm Copper Chasing Watte Pipe Install Vertical Raskit Shower Pixer Tacker Nove Sol Pipe Watte Pipe Install Stam Baht Standard Santaryware Pixe Tracker Range Bahronn Tape Standard Deve Install Vertical Copper End Feed * No of Items 24 Remarks	€ 1,467,85 € 112,36 € 110,73 € 115,59	Completed 18(01/201111:22 Completed 18(01/201111:24 Completed 18(01/201111:25 Completed 18(01/201111:25 Completed 18(01/201111:25 Completed 18(01/201111:15 Completed 18(01/201111:16 Completed 18(01/201111:16 Completed 18(01/201111:16 Completed 18(01/201111:125 Completed 19(01/201111:125 Completed 1

To finish off estimating the pipework for this job we need to make an allowance for fixings. We can do this in the Plastic Pipe 15mm Fixings and Plastic Pipe 22mm Fixings Workbooks. The Plastic Pipe 15mm Fixings Workbook is already in our estimate but the Pipe 22mm Fixings Workbook isn't. Let's bring it in.



[21] Press the Add Workbook button.

- 76 Tutorial Pipe work
- [22] Filter the Workbook Type dropdown to Pipe Fixings.
- [23] Select Plastic Pipe 22mm Fixings.



[24] Press the Select button.



[25] Select the Plastic Pipe 22mm Fixings Workbook and press Open Workbook.

Keywi	ord(s): Workbook	Type: Pipe Fixings
Select	t the Workbook(s) to add to your Estimate.	
Nam	-	Туре
	Copper Pipe Compression 10mm Fixings	Pipe Fixings
	Copper Pipe Compression 15mm Fixings	Pipe Fixings
	Copper Pipe Compression 22mm Fixings	Pipe Fixings
	Copper Pipe Compression 28mm Fixings	Pipe Fixings
	Copper Pipe Compression 8mm Fixings	Pipe Fixings
	Copper Pipe End Feed 22mm Fixings	Pipe Fixings
	Copper Pipe End Feed 28mm Fixings	Pipe Fixings
	Copper Pipe End Feed 8mm and 10mm Fi	Pipe Fixings
	Copper Pipe Manifolds and Micrafolds	Pipe Fixings
	Copper Pipe Solder Ring 15mm Fixings	Pipe Fixings
	Copper Pipe Solder Ring 22mm Fixings	Pipe Fixings
	Copper Pipe Solder Ring 28mm Fixings	Pipe Fixings
	Copper Pipe Solder Ring 8mm and 10mm	Pipe Fixings
	Plastic Pipe 10mm Fixings	Pipe Fixings
<b>~</b>	Plastic Pipe 22mm Fixings	Pipe Fixings
	Plastic Pipe 28mm Fixings	Pipe Fixings

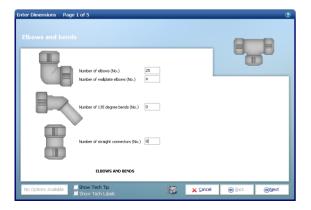
EstimatorXpress

[26] A	A dialog box pops up inviting you to enter a name and location for	Enter a	Worksheet name for th	is Plastic Pij	oe 22mm Fixings
	he first <b>Worksheet</b> in the current <b>Workbook</b> . Enter a <b>Name</b> of	Name	Water Pipe Fixings		✓ <u>O</u> K
V	<i>Vater Pipe Fixings</i> and a <b>Location</b> of <i>House</i> .	Locatio	n House	<b>•</b>	Concol

EstimatorXpress	
Select a Dimensional Template, or click E your own. <u>Fixing allowance 25m pipe</u> Fixing allowance 50m pipe Fixing allowance 100m pipe	idit to create

🗙 <u>C</u>ancel

[27] Next choose a dimensional template of Fixing Allowance 25m Pipe and press Select.



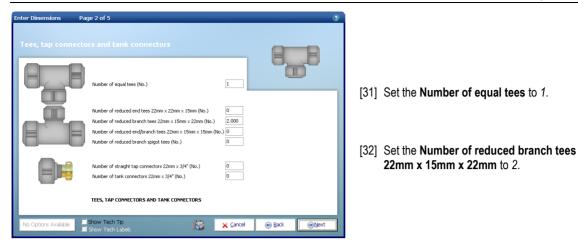
The Dimensions Wizard pops up.

🗩 <u>N</u>ext

- [28] On page one, enter the Number of elbows as 25.
- [29] Review the other fixings on page one and set them as appropriate.

[30] Click Next.

EstimatorXpress® Plumbing & Heating Trade Edition Tutorial



- [33] Continue through the remaining pages of the wizard quantifying the different fixings to meet the requirements of the job.
- [34] Once you have reached page 5, click Finish to close the Dimensions Wizard.



[35] Once you have reviewed the details of the resources you have allowed for, press the **Close** button to return to the **Summary of Plastic Pipe 22mm Fixings Workbook**.



[36] Now to return to the **Job Summary**, press the **Close** button. Answer **Yes** when asked if this **Workbook** is complete.

Close

[37] Now follow the same process with the **Plastic Fixings 15mm Workbook** allowing the following, together with any other fixings that you would like to include in the estimate:

Description	Quantity
Number of elbows	40
Number of equal tees	8
Number of 135 degree bends	4

Close Open Workbook	Add Delete Workbook Workbook		mport PlansXpres Drawing	s Order Workbooks			
Summary	Price Book	Chart	Reports	Address	Profit	Inflat	ion
My Jobs \ Job S	Summary						
Workbook Name		Remarks .	Total Cost	Comments	. Linked to Spec?	Complete?	Last opened
Ibber Glow-Worn Coc Gas Pipe Install Hots Gas Pipe Install Hots Coper Pipe Install Hots Coper Pipe Install Hots Pipe Install Hots Reductor Tals ISmm ( Reductor Tals ISmm ( Santaryware Price) Tracker Santaryware Price I Santaryware Price I Santaryware Price I Pipe Install Vertical PI Pipe Install Vertical PI	onfal Copper End Feed al Copper End Feed d I Some Fixings met Copper Microbore Asstic Microbore Asstic Anobore Copper Solder Ring Copper Solder Rango Asstic Mixer Mixer mm acter Rango Jard Arden Asstic	3	€ 1,467.85 € 112.67.85 € 112.75 € 112.75 € 125.76 € 207.07 € 207.07 € 335.67 € 489.64 € 330.67 € 335.67 € 489.64 € 335.67 € 335.67			Completed Comple	1801/2011 11:22 1801/2011 11:24 1801/2011 11:25 1801/2011 11:25 1801/2011 11:25 1801/2011 11:57 1801/2011 11:35 1801/2011 11:35 1801/2011 11:35 1901/2011 11:35 1901/2011 11:35 1801/2011 11:35 1801/2011 11:35 1801/2011 11:35 1801/2011 11:35 1801/2011 11:35 1801/2011 11:35 1901/2011 11:35 1901/2
No of Items 25		Sub Tota (ex VAT & Profit					

Once you have completed this **Workbook** your **Job Summary Screen** should look like this:

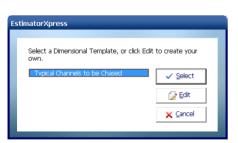
Finally we need to allow for chasing the pipes that drop down from the bathroom to the ground floor for the radiator flow and return.



[38] Select Chasing Walls Workbook and click Open Workbook.

- [39] You are now transferred to the Summary of Chasing Walls Workbook and a dialog box will automatically pop up asking you to name and give a location for the walls being chased.
- [40] Enter *Radiator Feed Pipes* as a **name** for this **Worksheet** and then select *Utility* for a **location**. Click **OK**.

- EstimatorXpress							
Enter a Worksheet name for this Chasing W	alls.						
Name Radiator Feed Pipes	V QK						
Location Utility	X Cancel						



[41] Select a dimensional template of **Typical Vertical Channel** and click **Select**.

The **Dimensions Wizard** automatically pops up.

- [42] On page 1 enter a Vertical length of channel of 2.5.
- [43] Enter a Typical width of channel of 0.1.
- [44] Enter a Typical depth of channel of 0.03.
- [45] We do not require any horizontal channel so make sure that Horizontal length of channel is set to 0.

⊛ <u>N</u> ext	[46] Click Next
----------------	-----------------

ber of sin	gle sockets to be rec	essed (No.) Number	of double sockets to be reco	essed (No.)	
	Number of single :	sockets to be recessed	(No.)		
П				Length of channel to be pre cut with grinder (M	) 2.5
				Are channels to be made good (Y/N) Builking factor of spoil (No.)	Y 2.00
				contrary rector to spore (no.)	

[50] Review the **Resources** section at the bottom of the page to check that you are happy with the material, labour and plant being used in this **Worksheet**. If you wish to change any resources you can use the **Resources Wizard**.

Channels to be cut Typical width 0.1			
Vertical length of channel (M)	1	<u></u>	Typical depth of channel (M) 0.030

- [47] We do not require any holes for electrical sockets to be cut so zero out these boxes. Set the Length of channel to be pre cut with grinder to 2.5.
- [48] Confirm that the channels are to be made good & that the bulking factor for spoil is 2.

|--|

[49] Click Finish.

Resources	Units	1	fotal Quantity	Description
Bonding coat plaster	M3	0.015	0.02	Bonding Plaster 25kg
Cut vertical channel	M	2,500	2.50	General Labourer
Cut horizontal channel	M	-	-	General Labourer
Cut edge to channel	M	2.500	2.50	General Labourer
Cut single socket recess	No.			General Labourer
Cut double socket recess	No.			General Labourer
Make good all channels	M	2,500	2.50	Plasterer
Clear debris	MB	0.015	0.02	General Labourer
Skip	M3	0.015	0.02	Skip 7m3 inc. Land Fill Tax



[51] Close the Radiator Feed Pipes Worksheet with the Close button to return to Summary of Chasing Walls Workbook.

Close



[52] Click the Close button from the Summary of Chasing Walls Workbook. A dialog box pops up asking if the Workbook is complete. Click Yes.

Close

# 80 Tutorial - Pipe work

Close Open Add Workbook Workbook W		nport PlansXpre: Drawing	is Order Workbooks			
Summary Price Bo	ok Chart	Reports	Address	Profit	Inflat	ion
My Jobs 🔪 Job Summary						
Workbook Name	Remarks .	Total Cost	Comments	. Linked to Spec?	Complete?	Last opened
Bailer Glow-Worm Combi		£ 1,467.85			Completed	18/01/2011 11:22
ias Pipe Install Horizontal Copper En	d Food	£ 1,407.05 £ 112.36			Completed	18/01/2011 11:22
as Pipe Install Vertical Copper Er ias Pipe Install Vertical Copper End I		£ 112.36 £ 18.73			Completed	18/01/2011 11:24
opper Pipe End Feed 15mm Fixings	000	£ 15.59			Completed	18/01/2011 11:25
lastic Pipe 15mm Fixings		£ 207.07			Completed	19/01/2011 13:54
adiator Tails 10mm Copper Microbo	re	2 20/10/			comproces	10/01/2011 10:01
adiator Tails 15mm Plastic Microbor						
hower Pump						
Vaste Pipe Fixings		£ 75.26			Completed	18/01/2011 14:42
Vaste Pipe Install 40mm		£ 19.47			Completed	18/01/2011 14:34
Jutside Tap		2 2010			comproces	10/01/2011 11:01
ipe Install Vertical Copper Solder Rit						
adiator Tails 15mm Copper	·9	£ 335.67			Completed	18/01/2011 11:36
hasing Walls		£ 17.58			Completed	19/01/2011 15:54
+ Double Panel Radiator 600 Deep		£ 770.95			Completed	18/01/2011 11:28
ipe Install Horizontal Plastic		£ 365.84			Completed	19/01/2011 11:02
ipe Install Vertical Plastic		£ 63.01			Completed	19/01/2011 11:27
hower Price Tracker Mixer		£ 185.55			Completed	18/01/2011 14:25
oil Pipe		£ 489.64			Completed	18/01/2011 14:32
/aste Pipe Install 32mm						
ath Standard		£ 262.68			Completed	18/01/2011 13:03
anitaryware Price Tracker Range		£ 326.71			Completed	18/01/2011 13:08
athroom Taps Standard		£ 83.00			Completed	18/01/2011 14:17
ipe Install Vertical Copper End Feed		£ 100.73			Completed	19/01/2011 11:31
lastic Pipe 22mm Fixings		£ 204.62			Completed	19/01/2011 13:24
io of Items 25	Sub Tota	£ 5,122.27				
o or accura Lo	(ex VAT & Profit					
	(ex val o Prork					

You will now see a final estimate costing for your **Chasing Walls Workbook** in the **Job Summary.** 

Well done! You've now completed your first estimate in **EstimatorXpress® Plumbing & Heating Trade edition**. We'll now move on to looking at the output of your estimate and scheduling of material orders, and work on site once you start the job.

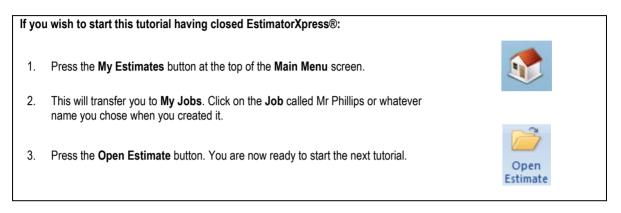
If yo	u wish to stop and close the current estimate:	
1.	Press the <b>Close</b> button on the top left of the <b>Job Summary</b> screen.	Close
2.	You are transferred to the <b>My Jobs</b> screen. Close this screen, also using the <b>Close</b> button.	Close
3.	You are now in the <b>Main Menu</b> Screen. To close <b>EstimatorXpress</b> ® press the <b>Exit</b> button on the top right of the screen.	×

10.00 Minutes

# **BAR CHART PLANNER**

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

If you have joined this tutorial after having closed EstimatorXpress® follow the steps below:



You are now going to look at producing **Bar Charts** with **EstimatorXpress**® to help with the planning of your **Job**. In this example, you will schedule the activities involved in installing our heating system & new bathroom.

As mentioned earlier, the **Job Summary** screen is the control centre for your estimate and from here you can edit the planning **Bar Chart** that you selected when you created your **Job**.

Close Open Add Delete Workbook Workbook Workbook	Recalc Save Import Planskyress Order Drawing Workbooks	Profit Inflation	
	Charc Reports Address	Profic	
My Jobs \ Job Summary	Remarks . Total Cost Comments	. Linked to Complete? Last opened	
WORKDOOK Name	Remarks . Total cost comments	Spec?	
Boler Glow-Worm Combi Gas Pipe Install Horizontal Copper End Feed Gas Pipe Install Workcld Copper End Feed Copper Pipe End Feed I Simm Fixings Plastic Pipe I Simm Fixings Radator Tals I Simm Rosper Microbore Radator Tals I Simm Rosch Microbore Shower Pung	£ 1,467,85 £ 112,36 £ 118,73 £ 15,59 £ 207,07	Completed 18/01/2011 11:22 Completed 18/01/2011 11:24 Completed 18/01/2011 11:25 Completed 18/01/2011 11:25 Completed 18/01/2011 11:27 Completed 19/01/2011 13:54	[1] Chart To begin, double click on the <b>Chart</b> tab near the top of
Waste Pipe Fixings Waste Pipe Install 40mm Outside Tap Pipe Install Vertical Copper Solder Ring	£ 75.26 £ 19.47	Completed 18/01/2011 14:42 Completed 18/01/2011 14:34	the screen. This will transfer you to the Bar Chart Planner inside your
Inperimental Vertical Copper Souter Anny Radiator Tails Tismn Copper Chasing Walls P+Double Panel Radiator 600 Deep Pipe Install Vertical Plastic Pipe Install Vertical Plastic Sol Pipe Sol Pipe Waste Pipe Install 32mm	£ 335.67 £ 177.95 £ 777.95 £ 362.84 £ 363.01 £ 165.55 £ 489.64	Completed 18/01/2011 11:36 Completed 19/01/2011 15:54 Completed 19/01/2011 15:54 Completed 19/01/2011 11:82 Completed 19/01/2011 11:82 Completed 18/01/2011 11:125 Completed 18/01/2011 14:35	Job.
Bath Standard Sanitaryware Price Tracker Range Bathroom Taps Standard Pipe Install Vertical Copper End Feed Plastic Pipe 22mm Fixings	€ 262.68 € 326.71 € 83.00 € 100.73 € 204.62	Completed 18/01/2011 13:03 Completed 18/01/2011 13:08 Completed 18/01/2011 14:17 Completed 19/01/2011 11:31 Completed 19/01/2011 13:24	
No of Items 25 Remarks	Sub Total £ 5,122.27 (ex VAT & Profit)		



TIP: For more information about creating and modifying Bar Charts press the Help button or the F1 Key on your keyboard.

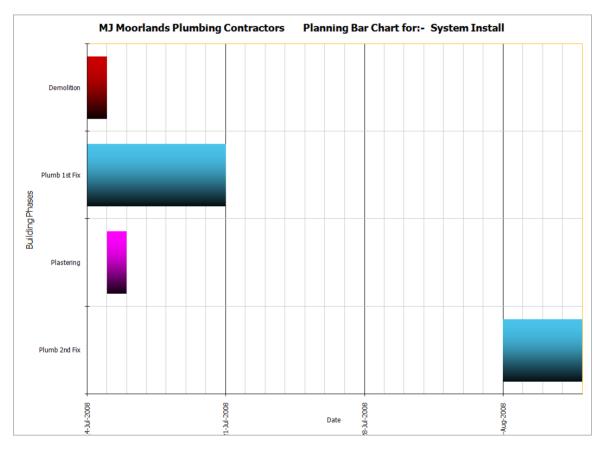
#### 82 Tutorial - Bar Chart Planner



TIP: EstimatorXpress® automatically loads the Bar Chart for a Large Extension as this is what you selected when you created the Job. It is a template Bar Chart with suggested durations for this type/size of build. If you decide at any point that this chart is unsuitable for the Job you are estimating, you can load a different chart from the Library of Bar Charts using the Library button.

[2] You will now see on screen a full Bar Chart for an extension. On the X-axis, you will see the approximate weekly durations for each phase and on the Y-axis, you will see the Build Phases for an extension. Notice that the start date is the start date you entered when you created your Job.

Clearly there is an awful lot of work being included in this bar chart that we are not concerned with. We only start with a full extension bar chart so that you can provide your customer with a view of when the plumbing tasks are carried out in relation to a complete build if you so wish. We will cut out all of the extra phases in our example to just leave the phases that we are interested in.



NOTE: The **Chart** shown above is an example of what a completed **Bar Chart** might look like. It may not be identical to the **Chart** you see on screen.



TIP: If the **Chart** contains **Build Phases** which are not relevant to this **Job**, you can use the **Remove Unused Build Phases** button to delete them from the chart. You will need to close the **Edit Bar Chart** tool before you so this (see next).

[3] A box pops up telling you that a build phase, Demolition, has been used in our estimate but isn't currently in our chart. It will be placed at the start of our chart with a duration of one week. We will need to move this and adjust its length in a minute. Press OK.

Est	timatorX	press
	1	The following phase(s) appear in your Estimate but not in your selected Bar Chart.
		- Demolition
		These have been added to your Bar Chart and require checking.
		OK
١.		

[4] We could leave all of the build phases in our plan to show our customer how the plumbing work relates to the entire build but in this case lets only show the build phases that relate to our estimate.



[5] Press **Close** to close the **Edit Bar Chart** tool.



[6] Press the **Remove Unused Build Phases** button to delete all unused build phases them from the chart.



[7] A dialog box pops up listing all the unused build phases and asking if you wish to remove them.

Click Yes.



[8] Click the Edit Bar Chart button to launch the Edit Bar Chart dialog box.

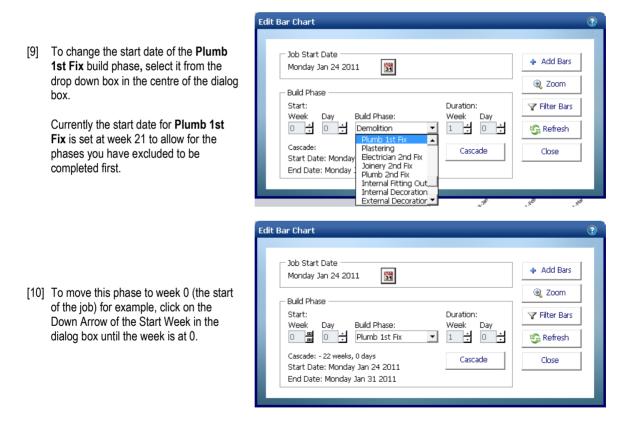
Edit Bar Chart	
Job Start Date Monday Jan 24 2011 Build Phase Start: Week Day Build Phase: Week Day Cascade: Start Date: Monday Jan 24 2011 End Date: Monday Jan 31 2011	Add Bars  Close

The **Edit Bar Chart** tool pops up over the **Bar Chart**. This tool allows you to modify the Start Week and Durations of each Build Phase so that the chart is more in line with how you are going to be working. You can access this tool at any time by pressing **Edit Bar Chart** button.

TIP: If the dialog box obstructs your view of the **Bar Chart** simply click on the bar at the top of the dialog box and with the left mouse button held down; drag the box to one side. When it is in a good position release the mouse button.



(With some PCs, Excel automatically hides some of the labels for clarity. Normally however these missing labels will be printed, depending on your printer resolution. To check any individual bar description or duration, mouse-over the bar, **EstimatorXpress**® will then show the name and duration of the phase in days.)



[11] You will see on the Bar Chart on screen that the Plumb 1st Fix Phase has been moved to week 0.

Plumb 1st Fix		
Plastering		
Electrician 2nd Fix		
Joinery 2nd Fix		
Plumb 2nd Fix		
Internal Fitting Out		
-	• · · · · · ·	

- Cascade
- [12] To move all the Build Phases after Plumb 1<sup>st</sup> Fix forward by the same duration, press Cascade button.

You will see that all the **Build Phases** following **Plumb 1**<sup>st</sup> **Fix** have been brought forward by the same number of weeks.

[13] Press the **Refresh** button to re-space the bar chart across the page.

Edit Bar Chart		_	_
Job Start Date Monday Jan 24 201 Build Phase Start:	uild Phase: Demolition	Duration: Week Day 1 1 0 1 Cascade	<ul> <li>Add Bars</li> <li>Q Zoom</li> <li>✓ Filter Bars</li> <li>✓ Filter Bars</li> <li>✓ Refresh</li> <li>Close</li> </ul>

[14] In the next example, you will decrease the duration of a Build Phase. First, you must select the phase from with the drop down box in the centre of the dialog box.

Select **Demolition** from the **Build Phase** dropdown.

Edit Bar Chart	<ul> <li>Add Bars</li> <li>Zoom</li> <li>Filter Bars</li> <li>Refresh</li> </ul>	<ul> <li>[15] Currently the duration for <b>Demolition</b> is set at one week. This build phase is only concerned with the chasing in of pipes required, so we only need allow for 1 day doing this.</li> <li>To decrease its duration to one day, click on the Down Arrow of the Week duration in the dialog heat by a set by a set</li></ul>
	Close	click on the Down Arrow of the Week duration in the dialog box to set it to 0. Then click on the Up Arrow of the Day duration in the dialog box to set it to 1.

- [16] You will see on the Bar Chart on-screen that the length of the Demolition build phase has decreased to 1 day.
- [17] Continue to edit the bar chart using these techniques until you are happy with the plan of your work.

Plastering

button on the top right of the screen.

Summary tab.

If you wish to stop and close what you have estimated and planned so far:

Press the Close button on the top left of the Job Summary screen.

You are transferred to My Jobs. Close this screen also using the Close button.

You are now in the Main Menu Screen. To close EstimatorXpress® press the Exit

Foundations

Print

Summary

1.

2.

3.

Edit Bar Chart		3			
	Duration: Week Day 1 0 0	<ul> <li>Add Bars</li> <li>Q Zoom</li> <li>✓ Filter Bars</li> <li>✓ Refresh</li> <li>Close</li> </ul>	Refresh Close	modi the F ensu chart [19] Whe	n you have finished ifying the chart, click <b>Refresh</b> button to re all phases of your t are on screen. n finished click <b>Close</b> on on dialog box.
Demolition					
Design Phase					
Plumb 1st Fix	_				

[20] To print the chart, press the Print button on the top toolbar.

EstimatorXpress® Plumbing & Heating Trade Edition Tutorial

[21] To exit the Job Bar Chart screen and return to the Job Summary, double click on the

Close

Close

# **REPORT MANAGER**

You are now going to look at producing **Reports** with the **EstimatorXpress® Report Manager** to help with the quoting, planning and management of your **Job**.

If you are starting this tutorial immediately after the previous section, you are in the right place to continue with this tutorial.

If you have joined this tutorial after having closed EstimatorXpress®, follow the steps below:

lf you	If you wish to start this tutorial having closed EstimatorXpress®:						
1.	Press the My Estimates button at the top of the Main Menu screen.						
2.	This will transfer you to <b>My Jobs</b> . Click on the <b>Job</b> called Mr Phillips or whatever name you chose when you created it.						
3.	Press the <b>Open Estimate</b> button. You are now ready to start the next tutorial.	Open Estimate					

[1] As mentioned earlier, the **Job Summary** screen is the control centre for your estimate and from here you can view and modify **Reports** for your **Job** - in this example for the heating system & bathroom installation.

Reports

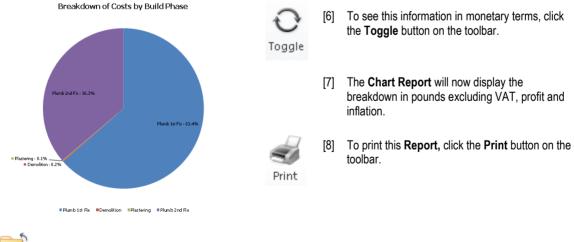
To begin, double click on the **Reports** tab near the top of the **Job Summary** screen to open the **Report Manager** screen.



#### 88 Tutorial - Report Manager

Summary Price Book	s * Zeros * Export * Chart Reports	You are transferred to the <b>Reports Manager</b> .
My Jobs \ Job Summary \ Rep	orts	
Report Name	Remarks	
Sales Price Cash Flow Cost Cash Flow Profit By Workbook Sales Price By Workbook Cost By Workbook Profit By Plant Type Sales Price By Plant Type Cost By Plant Type		[2] On the left of the screen, you will see all of the Reports that are automatically created for your estimate.
Profit By Subcontract Type Sales Price By Subcontract Type Cost By Subcontract Type Profit By Material Type Sales Price By Material Type Cost By Material Type Profit By Trade Sales Price By Trade		[3] Select the Chart Report called <b>Cost by Build Phase</b> .
Cost By Trade Profit By Type Sales Price By Type Cost By Type Profit By Build Phase Sales Price By Build Phase Cost By Build Phase Labour Hours By Trade Resource By Workbook Including Profit Sales Price Including Profit Painting Costs		Open [4] Click <b>Open Report</b> button. Report

[5] The Chart Report called Costs by Build Phase opens showing the breakdowns as a percentage of the total cost of the Job.



[9] Click the Close button to return to the Report Manager screen.

Close

[10] Have a look at any of the other **Chart Reports** available before moving on to the next step. EstimatorXpress® Plumbing & Heating Trade Edition Tutorial

Open Copy Delete/Reset Word Report Report Report Printout	Delete Accounts s*Zeros* Export* Chart	Reports
Report Name	Remarks .	
Cost By Build Phase	Kenidrks .	When you are ready, take a look at the tabular Departer
Labour Hours By Trade		When you are ready, take a look at the tabular <b>Reports</b> :
Resource By Workbook Including Profit		
Sales Price Including Profit	1	
Painting Costs	in the second se	
Plastering Costs		[11] Scroll down the screen to find the Materials Task List
Plumbers Costs	n	
Bricklayers Costs		Report.
Joinery Costs		
Plasterers Costs		
Costs Including Vat		
Net Costs by Workbook	-	
Cost Summary Report	-	
Costs Inflated Costs		[12] Click on the Report and press <b>Open Report</b>
Costs by Resource	<b>ä</b>	button.
Cash Flow	<b>a</b>	Open Dullon.
Inflated Cash Flow	6	Report
Profit Forecast		Report
Adjusted Profit Forecast		
Estimated Quantities	Estimate Units	
Labour Time Schedule	Order Quantity Units	
Plant Task List	Order Quantity Units	
Plant Used	Order Quantity Units	
Labour Task List	Order Quantity Units	
Labour Used	Order Quantity Units	
Materials Order Schedule	Order Quantity Units	
Materials Task List	Order Quantity Units	
Build Phases By Workbook Materials By Type	Order Quantity Units Order Quantity Units	
Inacenais by Type	Cruer Quantity Units	

[13] You will now see all a list of all the materials required to carry out the job that you have estimated alongside the quantity needed inclusive of wastage, cost and their **Order by Date**.

Order By 💌	Date Required	* Description	Purch Cost (£) V Purchase Units	Quantity required	Wastage	Order Quantity	Item Costs	Wastage Costs	Total Costs
13/12/2010	24/01/20	11 R'mix Concrete GEN 1 50 - 70mm slump 6m3 (Allowance £80)	£80.00 M3	0.05	0.00	0.05	£4.00	£0.30	£4.30
		Wood Screws Steel CSK Twin Thread 8 x 1.5 inch (200 box)	£6.70 BX	0.08	0.01	0.09	£0.55	£0.04	£0.59
10/01/2011	24/01/20	11 Waste Pipe 40mm x 3M	£6.20 EA	1.33	0.10	1.43	£8.27	£0.62	£8.89
		Glow-Worm Standard Flue Kit	£89.00 EA	1.00	0.08	1.08	£89.00	£6.68	£95.68
		Glow-Worm Flexicom 30cx Combi Bailer	£1,109.00 EA	1.00	0.08	1.08	£1,109.00	£83.18	£1,192.18
		Copper End Feed Straight Coupler 15mm	£0.20 EA	3.50	0.26	3.76	£0.70	£0.05	£0.75
		Copper End Feed Street Elbow 15mm	£0.60 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Full Cross Over 15mm	£6.00 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Obtuse Elbow 15mm	£0.80 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Elbow 15mm	£0.30 EA	5.00	0.38	5.38	£1.50	£0.11	£1.61
		Copper End Feed Male Elbow 15mm x 1/2 inch	£6.00 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Female Elbow 15mm x 1/2 inch	£4.90 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Male Straight Connector 15mm x 1/4 inch	£4.70 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Bent Tap Connector 15mm x 1/2 inch	£2.20 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Straight Tap Connector 15mm x 3/4 inch	£5.50 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
1		Copper End Feed Imperial/Metric Adaptor 15mm x 1/2 inch	£3.20 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Part Cross Over 15mm	£5.30 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Slip Coupler 15mm	£1.50 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Stop End with Air Vent 15mm	£3.60 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Stop End 15mm	£1.40 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Female straight Connector 15mm x 1/2 inch	£2.90 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Male Straight Connector 15mm x 1/2 inch	£2.90 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Reduced Coupler 15mm x 8mm	£1.90 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Reduced Coupler 15mm x 10mm	£0.90 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00
		Copper End Feed Equal Tee 15mm	£0.60 EA	1.00	0.08	1.08	£0.60	£0.05	£0.65
		Copper End Feed Straight Tap Connector 15mm x 1/2 inch	£1.40 EA	0.00	0.00	0.00	£0.00	£0.00	£0.00

NOTE: To see all data either scroll using the scroll bars or use the **View** menu on the menu bar to change the **Zoom** setting. It is normally set at 85% but if you set it to a lower number, more data will fit on your screen.

NOTE: You may have noticed that there are various resources that appear in the reports i.e. **Copper End Feed Female Elbow 15mm x** ½ **inch**, with a quantity of 0. They are appearing in your reports because we had various **Worksheets** that use the products but we have set the quantity required to 0 (we set **Copper End Feed Female Elbow 15mm x** ½ **inch** to have a quantity of 0 in the **Copper Pipe End Feed 15mm Fixings Workbook**). To remove these items from appearing in our reports use the 2 options in the **Delete Zeros** dropdown from the **Reports Manager** screen.



[14] Press the **Close** button to return to the **Library of Reports screen** to return to the **Reports Manager** screen.



[15] From the Delete Zeros dropdown select Remove Resources with a Quantity of 0.



[16] Click on the Report called Material Task List and press the Open Report button.

[17] You will now see that all resources with a quantity of 0 have been removed from your reports.

Order By	Date Required	<ul> <li>Description</li> </ul>	<ul> <li>Purch Cost (£)</li> </ul>		Quantity required	Wastage	Order Quantity	Item Costs	Wastage Costs	Total Costs
13/12/20	010 24/01/20	11 R'mix Concrete GEN 1 50 - 70mm slump 6m3 (Allowance £80	) £80.00	M3	0.05	0.00	0.05	£4.00	£0.30	£4.30
		Wood Screws Steel CSK Twin Thread 8 x 1.5 inch (200 box)	£6.70	BX	0.08	0.01	0.09	£0.55	£0.04	£0.59
10/01/20	24/01/20	11 Waste Pipe 40mm x 3M	£6.20	EA	1.33	0.10	1.43	£8.27	£0.62	£8.89
		Glow-Worm Standard Flue Kit	£89.00	EA	1.00	0.08	1.08	£89.00	£6.68	£95.68
		Glow-Worm Flexicom 30cx Combi Boiler	£1,109.00	EA	1.00	0.08	1.08	£1,109.00	£83.18	£1,192.18
		Copper End Feed Straight Coupler 15mm	£0.20	EA	3.50	0.26	3.76	£0.70	£0.05	£0.75
		Copper End Feed Elbow 15mm	£0.30	EA	5.00	0.38	5.38	£1.50	£0.11	£1.61
		Copper End Feed Equal Tee 15mm	£0.60	EA	1.00	0.08	1.08	£0.60	£0.05	£0.65
		Copper Tube EN1057 15mm x 3M	£5.40	м	17.50	1.31	18.81	£94.50	£7.09	£101.59
		Red Wall Plugs (100 Box)	£2.20	EA	0.17	0.01	0.18	£0.36	£0.03	£0.39
		Clip Over Pipe Clip 15mm	£0.20	EA	10.50	0.79	11.29	£2.10	£0.16	£2.26
		Plastic Pipe 15mm x 25M	£29.00	EA	2.92	0.22	3.14	£84.68	£6.35	£91.03
		Plastic Pipe Conduit 15mm x 25M	£21.00	EA	1.40	0.11	1.51	£29.40	£2.21	£31.61
		Plastic Straight Connector 15mm	£1.50	EA	1.52	0.11	1.63	£2.28	£0.17	£2.45
		Plastic Pipe Clip Screw 15mm	£9.00	PK	2.53	0.19	2.72	£22.80	£1.71	£24.51
1		Plastic Pipe 22mm x 25M	£56.00	EA	0.88	0.07	0.95	£49.28	£3.70	£52.98
		Plastic Pipe Conduit 22mm x 25M	£26.00	EA	0.46	0.03	0.49	£11.96	£0.90	£12.86
		Plastic Pipe Clip Screw 22mm	£9.00	PK	0.70	0.05	0.75	£6.30	£0.47	£6.77
		Plastic Straight Connector 22mm	£2.00	EA	0.42	0.03	0.45	£0.84	£0.06	£0.90
		Clip Over Pipe Clip 22mm	£0.50	EA	6.00	0.45	6.45	£3.00	£0.23	£3.23
		Copper Tube EN1057 22mm x 3M	£11.00	M	6.00	0.45	6.45	£66.00	£4.95	£70.95
		Copper End Feed Straight Coupler 22mm	£0.40	EA	2.00	0.15	2.15	£0.80	£0.06	£0.86
		Plastic Microbore Nail 22mm	£18.00	HD	0.04	0.00	0.04	£0.72	£0.05	£0.77
		Plastic Equal Tee 15mm	£2.50	EA	8.00	0.60	8.60	£20.00	£1.50	£21.50
		Plastic Elbow 15mm	£1.80	EA	40.00	3.00	43.00	£72.00	£5.40	£77.40
		Plastic Bend 135deg 15mm	£1.90	EA	4.00	0.30	4.30	£7.60	£0.57	£8.17

Sort by Date

[18] If you make changes to the **Report** and you want to restore this data to being sorted by order date, click anywhere in the column labelled **Order By** and press the **Sort by Date Order** button on the top tool bar.



For more information about changing the appearance of Reports press the Help button or press the F1 Key on your keyboard.

[19] When finished press the **Close** button to return to the **Reports Manager** screen.

Close Report

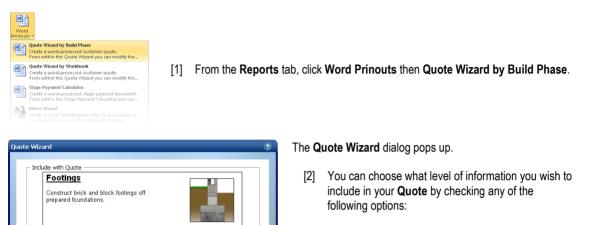
Finally, you can now print out a Customer Quotation in Microsoft® Word with the EstimatorXpress® Report Manager Quote Wizard.

EstimatorXpress® Plumbing & Heating Trade Edition Tutorial

# PRINTING OUT A CUSTOMER QUOTATION IN MICROSOFT® WORD

15.00 Minutes

NOTE: You must have Microsoft® Word installed on your PC, for this feature to function.



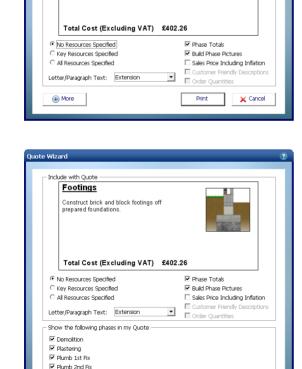
No Resources Specified Key Resources Specified All Resources Specified Phase Totals Build Phase Pictures Sales Price inc. Inflation

If you select **Key Resources** or **All Resources Specified** you can then also choose whether you wish the following items to be included in your **Quote**:

# Customer Friendly Descriptions Order Quantities

- [3] As you check and uncheck the various options, the sample text relating to Footings displayed in the dialog box will change to give you an idea of how the text might look in your finished Quote.
  - [4] Click on the More button to see which Build Phases are to be automatically included in the Quote. You may wish to uncheck any of them in order to exclude them.

NOTE: The **Advanced Options** button allows you to change which materials are explicitly mentioned in the quote for each individual **Build Phase** e.g. you may wish to exclude **concrete** from the phase **Plumb 1**<sup>st</sup> **Fix** build phase but you would want to include the **Boilers Gas** type.



Resources in Ounte

Print

Resources Display Settings

Preferences

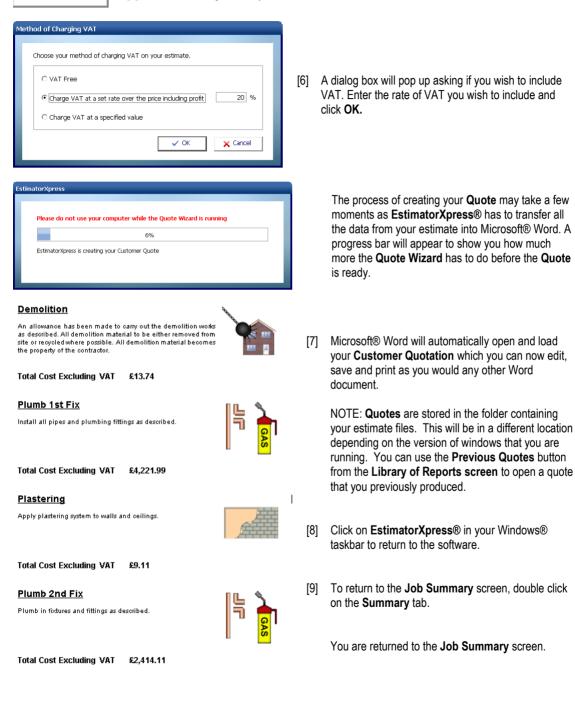
🗙 Cancel

🚯 More

We recommend you print your Quote with the default settings initially and then experiment with them later.

Print

[5] Click Print to generate your Quote in Microsoft Word.



TIP: In future, you may also want to review some of the Preferences for your printed quotation.

#### Preferences

[10] From the Quote Wizard dialog box, press the Preferences button.

Letter/Paragraph Text	
Paragraph Set: Extension	
Select the Introductory text you want your customer t	o see in your Quote.
Opening Paragraph: HBXL Default	Edit Text
Select the Closing text you want your customer to see Quote.	in your
Closing Paragraph: HBXL Default	Edit Text
Select a Build Phase to edit. Plumb 1st Fix	Edit Text
Check that your Page Setup details are correct. You can a your company logo to your Quote or select to print on a p printed letterhead.	
Alter your Plans Specific Descriptions for the Er	dited Non-Edite

The **Preferences** dialog box will appear. From here you can modify the standard paragraphs of text that will appear in your quote including:

Opening Paragraph Closing Paragraph Build Phase Paragraphs

	Page	Setup
--	------	-------

Plus you can use the **Page Setup** button to tell **EstimatorXpress**® that you want to use your own headed paper or to import your company logo.

You may also want to review **Resource Descriptions.** For example you may not want the ball valve to appear in the **Customer Quotation** as "Chrome isolating Ball Valve Copper x Copper 22mm" so you can tell the software to simply substitute **Isolating Ball Valve**.

Non-Edited

To view product descriptions that may required editing and to give them your choice of name, click the **Non-edited** button.

A dialog box containing all full length product descriptions used in your estimate will appear. Click on the product you wish to change and type in a new name. This name will be remembered for future **Quotes.** 

1.	To close your completed <b>Job</b> , press the <b>Close</b> button on the top left of the <b>Job Summary</b> screen.	Close
2.	You are transferred to <b>My Jobs</b> . Close this screen also using the <b>Close</b> button	Close
3.	You are now in the <b>Main Menu</b> Screen. To close <b>EstimatorXpress</b> ® press the <b>Exit</b> button at the top right of the screen.	×

Congratulations on working all the way through the Tutorial! You should now have a good grasp of how EstimatorXpress® works. Remember you can refer to the Help system at any time, accessed by clicking the Help button or pressing F1 on your keyboard to provide more details of each screen or ring HBXL Technical Support on 0845 1234 085.

# GLOSSARY

#### Accounts Export

Use this button to export data to QuickBooks® and CIA® software packages if you are using Total Toolkit edition.

#### Adjustment (Within Price Book)

This is a percentage you may apply to the list price of a resource in the Price Book to increase/decrease the price.

#### Area Estimator

See Workbook (Area/Volume/Perimeter)

#### Bar Chart

This is a visual planning chart that EstimatorXpress® produces in the Bar Chart Planner.

#### **Build Phase**

Build Phases are an important component within the structure of **EstimatorXpress**®, allowing you to manipulate the output in the Report Manager to organise Material deliveries and cashflows etc. Each Estimate is divided into the various phases of work, for example: Plumb 1<sup>st</sup> Fix, Plumb 2<sup>nd</sup> Fix and Demolition. Every item in an Estimate is assigned to a Build Phase to allow you to group together all items required in a particular Build Phase, for example you can group together all materials required for the 2<sup>nd</sup> fix, by applying the "Plumb 2<sup>nd</sup> Fix" filter in the Report Manager. You define the start dates of each Build Phase in the Bar Chart.

#### **Button Bar (With Reports)**

These are horizontal grey bars, which appear in opened Reports and allow you to modify the Report by dragging the bar to different parts of the screen.

#### Cell

The Screen is divided into a number of rectangular areas called "cells". Coloured cells are "Locked" and cannot be edited. White cells are can be edited by moving the cursor into the cell and editing.

#### Code

This is the manufacturer's code for the described Resource.

#### Completed (Within Job Summary)

Defines whether you regard the estimating in a **Workbook** as having been completed. (Each time you close a **Workbook** you are asked whether the **Workbook** has been completed, and the **Job Summary** marked accordingly).

#### **Composite Items Estimator**

See Workbook (Composite)

#### Сору

This is the function, which allows you to create a duplicate of an existing item having selected it with your mouse, for example, a **Price Book**, **Worksheet** or **Column**.

#### Critical

Critical indicates an item, which you consider to be critical and worthy of close attention during estimating. For example, the cost of nails may not be particularly important but the cost of bricks will probably be regarded as critical.

#### Cursor

The small marker on the screen (often in the shape of a white arrow or white cross) that follows the movement of the mouse and indicates which area of the screen will be affected when you press the mouse button. The cursor changes shape during certain tasks.

#### Desktop

This is the main area of Windows where you can open and manage files. When **EstimatorXpress**® is properly installed, a **EstimatorXpress**® icon should appear on your desktop.

#### **Dialog Box**

A Dialog Box is a box of information, which "pops up" when various commands have been initiated by you using the various buttons on the Screen. Normally your will be expected to enter information or use the select arrow to choose information in the pull down box on the Dialog Box. Once the information has been entered or selected, press the OK or Cancel button to clear the Dialog Box. While the Dialog Box is on the Screen, no other button pressing or editing can occur.

#### **Dimensions Section**

This is the section of a **Worksheet** where you may add the dimensions of your building works. Once you have opened a **Worksheet**, within a **Workbook** you will be in the dimensions section unless you have opened a composite **Workbook** that doesn't have a dimensions section.

#### **Discount (Within Price Book)**

This is a percentage applied to the list price of a resource in the Price Book to decrease its Purchase Cost.

#### **Double Click**

Double Clicking accesses some commands without pressing a specific button. The Double Clicking command is assigned to various functions throughout **EstimatorXpress**® and changes as you move through the various Screens e.g. **Open Workbook.** The special Double Clicking function only functions on coloured, locked areas of the screen. In addition to the special functions, Double Clicking will allow you to edit text within cells, which are not locked.

#### Drag

To drag an item first select it with your mouse, next hold the left-hand mouse button down and, with the mouse button still pressed, move the pointer to the desired position, the selected item will then have been "dragged". To drag over some text, select an item of text. Hold the left-hand mouse button down and, with the mouse button still pressed, move the pointer over the desired text. The selected text will change colour, indicating that it has been selected. Release the mouse button once the text has been selected.

#### **Drop Down Box**

This is a box in which you select an item by clicking on the small down arrow, this opens your options and allows selection of the item with the mouse. You may also have to use the scroll bar on the drop down box to find the item you require.

# **Duration Days (Within Bar Chart)**

This is the number of days that you anticipate each phase will take to complete and is calculated by EstimatorXpress® from the Duration (Weeks) entry.

#### **Duration Weeks (Within Bar Chart)**

This is the number of weeks that you anticipate each phase will take to complete.

#### Estimate

This is any complete heating system/renovation job/new build install/bathroom refit...

#### Estimate Rate

Estimate Rate is the cost per usage unit. For example, pipe is laid at £1 per m. (£1 is the Estimate rate). The Estimate rate is obtained by Multiplying the Production/Usage Factor x Purchase Cost.

# Export

Exporting allows the user to transfer any screen information into a new standard Microsoft Excel file, which can then be opened in Microsoft® Excel. All information is transferred in value or text form without any underlying formulas. All exported sheets are stored in the C:\Program Files\HBXL\EstimatorXpress\Exports folder where C:\Program Files\HBXL\EstimatorXpress® was installed.

#### lcon

This is a small picture, which represents something that you can manipulate, such as a folder or a document. When **EstimatorXpress**® is properly installed, a **EstimatorXpress**® icon should appear on your desktop.

#### Item Used For

Item Used For describes the usage of a Resource. E.g. Plastic Pipe Clip Screw 15mm are used to Secure Pipe.

#### Job Description

This is the description of the Job and is added by you when the Job is first created.

#### Job No.

This is the number automatically created by **EstimatorXpress**® when an estimate is created and ensures that each estimate has a unique reference.

#### Job Reference

Job Reference is the name provided for the **Estimate** or **Job** (created by the user) combined with the Job No. (Provided automatically by **EstimatorXpress**®).

#### Job Summary

When you create a new Estimate, EstimatorXpress® creates a summary of the elements (Workbooks) that the estimate contains and presents this information in the Job Summary Screen. The Job Summary allows you to view the progress of your estimate and provides access to the Profit Margin, Inflation, Bar Chart and Address Screens for the Job in hand.

#### Job Value

This is the overall cost of the estimate shown in the My Jobs and Job Summary. (Excluding Profit).

#### **Group Of Workbooks**

A Group of **Workbooks** is a list of **Workbooks** grouped together to allow the user to easily select a "check list" of items required in a particular type of **Job** and so speeds up the estimating process. For example, a simple bathroom fit-out **Group Of Workbooks** could include...

Showerbath **Workbook**, Sanitaryware Price Tracker Range **Workbook**, Ceramic Wall Tiling **Workbook**, Waste Pipe Install 32mm **Workbook**, Towel Rail Straight **Workbook**, Bathroom Taps Standard **Workbook**, Pipe Install Vertical Copper End Feed **Workbook**, Pipe Install Horizontal End Feed **Workbook**, Plumbing Consumables **Workbook**.

The user can create their own **Group Of Workbooks** to reflect the different types of work they carry out. During the estimating process users may also add additional **Workbooks** to the selected **Group Of Workbooks** within the **Job Summary**.

#### Locations

Locations references are used to sort Reports by the position of the element within the Estimate. For example: Kitchen, Bathroom etc. **EstimatorXpress**® uses locations references for sorting Reports. For example if you had estimated a system install, it would be possible to create a Report, which "picks out" only those **Worksheet**s and associated resources, which relate to the Bathroom.

#### Locked Cells

In most windows the Screen is divided into two distinct areas: Coloured areas: These areas are locked and cannot be edited or typed into by the user. White areas: The areas are unlocked and can be edited or typed into by the user.

NOTE that in Report Screens the usual Rules relating to Coloured and White Screen Areas do not apply.

# Main Menu

This is the first screen that opens once EstimatorXpress® is fully installed.

#### Master

When the label "Master" appears on any summary/library screen, this indicates that the item cannot be modified. You can however copy items marked Master and then modify them.

#### My Jobs

This is the screen where your estimates are listed. You can open your Estimates or create new Estimates from this screen. This screen is accessed from the **Main Menu** by pressing **My Estimates** button.

#### Notice or Delivery (Within the Price Book)

Indicates the number of week's notice or lead-time that is required to ensure that a particular Resource is available on site.

#### **Payment Terms**

Payment Terms is the number of weeks allowed by the supplier before payment is due on items supplied or delivered to site on each Resource. The Payment Terms are defined in the **Price Book** when each Resource is created or edited.

# **Price Book**

This is a list of Resources which you have available to cost your Estimate. The Resources are split within the **Price Book** into 5 different sections. You may create your own resources or modify details of ones that already exist in **EstimatorXpress**<sup>®</sup>.

#### **Production/Usage Factor**

See Usage Factor

# **Profit Margin**

Profit margin percentages are initially set "globally" for all new estimates by the user from the **My Settings Menu**. The user can then modify the margins on a **Job**-by-**Job** basis from the **Job Summary**. NOTE that the Profit Margins are added to each item in the Estimate in the Report Manager only. The calculated costs, which appear in the **Workbooks** and **Job Summary**, are the raw costs exclusive of any profits.

# Project

A Project is a group of **Estimates**, which are grouped together to give an overall view of a site or an overall view of workload in the Project Manager. (See Project Manager)

#### **Project Description**

This is simply a label given to a particular Project for identification purposes by you. EstimatorXpress® does not use it for sorting.

#### **Project Manager**

This allows you to merge selected **Jobs** that you have previously estimated with the **EstimatorXpress**® into overall **Bar Charts** and **Reports**. The Project Manager accumulates all estimated costs and the materials, plant, labour required as well as overall cash flow for the selected **Jobs** and projected profit. The **Project Manager** produces the same **Reports** as the **Report** Manager but for several **Jobs** grouped together rather than an individual **Job**. This feature is only available with Total Toolkit edition.

#### **Project Number**

Project Number is the number automatically created by EstimatorXpress® and ensures that each Project has a unique reference.

#### Purchase Cost

Purchase Cost is the purchase cost from the supplier per unit of supply of the Resource, which is defined in the **Price Book** when each Resource is created or edited.

#### **Purchase Unit**

This is the "unit of supply" of the Resource that is defined in the **Price Book** when each Resource is created or edited. (E.g. Tins, Bags, Each etc.)

#### **Quick Keys**

In some cases where Quick keys have been assigned to a button, a message on the Status Bar or Tool tip will indicate the Quick key command. For example: Print- (Ctrl P). This indicates that the command button may be selected from the keyboard rather than the mouse by pressing the Control Key together with the appropriate letter.

#### **Quote Wizard**

Use the Quote Wizard from the Reports Manager screen to create Customer Quotations in Microsoft Word.

#### **Report Manager**

This combines the previously created Estimate and Bar Chart to produce Reports such as Material Schedules, Cash Flow, Overall Job Costs and Profit Forecast.

#### Resource

Resources are Labour, Materials, Plant, Subcontractor and Sundry Items. **EstimatorXpress**® uses resource references for sorting Reports and in the **Price Book**. This enables the user to produce a Report, which for example details all the Materials costs for a Project. You cannot create additional Resource *categories*, but are able to create additional Resources in the **Price Book** either from the **Main Menu** or during the course of an Estimate.

#### **Resources Section**

This is the section of a **Worksheet** where all the materials, plant and labour for a part element of a build are listed. For example, the resources section of a Underfloor Heating in Screed **Worksheet** would include Pipe, System Plates, a Manifold, Actuators & a Plumber to install the system.

#### Row

A horizontal collection of cells/information on screen.

#### Screen Shot

A picture showing all or part of the computer screen.

#### Scroll Bars

Scroll Bars are located at the bottom and side of each Screen and allow you to move the viewed area of the Screen. To use the Scroll Bar place the arrow on the scroll bar button and drag the button to move the Screen. Alternatively, click either side of the button or click on the arrows at the top and bottom of the scroll bar.

#### Sheet Name

This is the name of the Worksheet and is created by you or provided when the original Workbook was created.

#### Sort

This allows you to arrange data alphanumerically in A-Z order, date order, Build Phase order and others using specific sorting buttons.

#### Status Bar

The Status Bar appears at the bottom of the Screen and is used to display information about what **EstimatorXpress**® is doing during automatic routines.

#### Sundry Item

Diverse items required in your estimate that are not specifically related to the dimensions input into an estimate Workbook.

#### Sundry Items Area

The area in which you add sundry items to your estimate in a **Workbook**. The items are always unrelated to any automatic calculations carried out by **EstimatorXpress**<sup>®</sup>.

#### Suppliers

The organisation/ persons who provide you with your materials/plant/labour/subcontract.

#### Toolbar

A series of shortcut buttons that provide quick access to commands. Usually situated at the top and bottom of the screen.

# **Tool Tip**

This is a Help feature that displays the function of a button when you move your cursor over a button.

#### Total Cost (Job Summary)

This is the estimated finished cost of a particular Workbook (Excluding Profit).

#### **Total Order Quantity**

This is the total order required, expressed in purchase units, as distinct from usage units.

#### Туре

Type is a category, which is defined to enable you to sort similar items into groups. You may use the predefined types or create your own using the button on the **Main Menu**. (Opportunities to create new types and other sort references also occur in many Dialog Boxes). For example, the Type "Copper Fittings" includes all the different types of copper with various connection methods.

#### Unit of Supply

These are the units that the supplier chooses to supply his Resource in. (NOTE that once a resource has been created the Units of Supply cannot be changed. If you wish to source the resource in different Units of Supply, you must create a new resource. This is to guard against the problem of the user modifying the units whilst considering one **Workbook** and taking into account that it may well affect other **Workbooks**).

#### Unlocked

In most windows the Screen is divided into two distinct areas:

Coloured areas: These areas are locked and cannot be edited or typed into by you.

White areas: The areas are unlocked and can be edited or typed into by you.

NOTE that in Report Screens the usual Rules relating to Coloured and White Screen Areas do not apply.

#### **Usage Factor**

Production / Usage Factor is the factor which is applied to the purchase cost to convert the purchase cost to the "Estimate Rate". For example if the Plumber is paid  $\pounds$ 30.00 per hour and the Estimate Rate for laying pipe is  $\pounds$ 0.80 per m, then the usage factor would be 0.04. Thus Cost for laying pipe is  $\pounds$ 30.00 \* 0.04 =  $\pounds$ 0.80.

#### **Usage Factor Calculator**

When you are editing resources in a **Worksheet**, the **Usage Factor Calculator** can help you work out the correct **Usage Factor** to input.

# **Usage Units**

These are the units that you actually use a resource in. For example, paint will be purchased in "purchase units" of 5 litre tins, but will be used to paint areas in m<sup>2</sup>, which is the "usage unit".

#### Variations

If you are using Total Toolkit edition, it is possible to create and save Variations to previously created Customer Quotes.

# VAT Codes

VAT % is the rate of VAT defined by you when the Resource was created or modified by the user in Price Book.

#### Wastage Cost

This is the cost of the Wastage based on the Wastage Factor defined in the Price Book.

# Wastage Factor

This is the wastage allowance (percentage) on each Resource that is defined in the **Price Book** when each Resource is created or edited.

#### Workbook

Within each Estimate, you must select the elements of work or **Workbooks** that you need to estimate. For example, there will be a **Workbook** for Copper Pipe, Plastic Pipe, P+ Radiators... An estimate will therefore contain numerous **Workbooks**. Each **Workbook** can also contain several **Worksheets**.

# Workbook (Area/Volume/Linear)

The Area, Perimeter and Volume Workbooks, are used to estimate quantities and list resources for elements of the build which have not been defined in the standard Workbooks. The Area, Perimeter and Volume Workbooks, are similar to the Composite Items Workbooks in that they are lists of resources that go to make up the above elements of the build. However, unlike the Composite Items Workbooks they are linked to a calculation tool provided with EstimatorXpress®, which works out the area, length and volume of different shapes and multiplies the unit costs by the calculated areas. These Workbooks are provided so that the user can easily create their own calculators based on area, length and volume.

#### Workbook with a Dimension/Quantity Entry Area

The Workbooks with a dimension/quantity entry section are linked to a range of calculators provided within EstimatorXpress® Plumbing & Heating Trade edition, and provide a variety of complex calculations for items such as underfloor heating.

The other **Workbooks** in this category consist of a list of similar items that require quantifying individually i.e. a **Plastic Pipe 22mm Fixings Workbook** has 18 different fixings of that size that you can quantify as required.

#### Workbook (Composite)

Composite item **Workbooks** such as Bathrooms, Kitchens and Staircases are simply a list of resources that go to make up that element of the build and are not dependent on you inputting dimensions.

For example, a Bathroom **Workbook** could contain several **Worksheets**... one for each bathroom in a house. Each **Worksheet** could contains the various fittings required for each bathroom

#### Worksheet

Each **Workbook** can contain several **Worksheets**. For example, you may wish to estimate two different types of cavity walls in one **Job** such as front cavity wall in stone and rear cavity wall in brick. You would then need a separate **Worksheet** for the Rear **Brick** Walls and a separate sheet for the Front **Stone** Faced Walls in a house reflecting the different materials used in the walls. Both of these **Worksheets** will be estimated with the Cavity Wall **Workbook**.

#### Zoom

**EstimatorXpress**® allows you to predefine the amount of information viewable at any time by modifying the Zoom setting. The Zoom may be modified permanently by using the Zoom option in the View Menu on the Menu Bar.

# **ESTIMATORXPRESS® TERMS & CONDITIONS**

The software contained in this package is supplied on the terms and conditions of the software licence contained in the enclosed manual. The supply of this package is conditional upon you reading and accepting the terms and conditions of the licence. If you do not accept the terms and conditions you must not install or use the software and return the software, together with documentation and all packaging in good condition, to the supplier within 7 days.

#### Licence Agreement

Please note that this copy of EstimatorXpress only entitles the user to use the package on one computer in accordance with the Licence terms detailed below in these notes. This licence agreement applies to all versions of EstimatorXpress® from time to time.

EstimatorXpress® Copyright House Builder XL Limited (HBXL)

All rights reserved. No part of this publication may be reproduced in any form without the written permission of House Builder XL Limited

This publication contains information, which is confidential to House Builder XL Limited, and all copyright, trademarks and other intellectual property rights of the EstimatorXpress® software and this manual are the exclusive property of HBXL Limited.

You have received a single user copy of EstimatorXpress®, which entitles you to place the software on one personal computer only, from the date of registration.

You should contact House Builder XL Limited for any other arrangements: House Builder XL Limited 3 Portland Place Pritchard Street Bristol BS2 8RH

Current telephone, fax and email contact details are available at www.hbxl.co.uk

EstimatorXpress®

Microsoft Excel, Microsoft Word and Windows are trademarks of Microsoft Corp

#### Registration

All users must register their software online with www.hbxl.co.uk as indicated on loading the software. No support will be provided unless the software has been properly registered.

#### Annual Charges

The Initial Licence of EstimatorXpress® entitles the user to use of the software on the terms described in this Licence from the initial date of registration.

In order to receive the Price Tracker<sup>™</sup> service<sup>\*</sup>, unlimited telephone and email technical support and software upgrades, users must subscribe to EstimatorXpress<sup>®</sup> HBXL Support & Updates. Support will only be provided with a valid HBXL Support & Updates subscription. On each and every anniversary of the initial EstimatorXpress<sup>®</sup> HBXL Support & Updates subscription, a renewal fee will become due entitling the user to the Price Tracker<sup>™</sup> service<sup>\*</sup>, unlimited telephone and email technical support and all software upgrades for a further period of 12 months from the renewal date.

Should the user advise HBXL, prior to the anniversary date of the renewal of their HBXL Support & Updates subscription, that they do not wish to renew their HBXL Support & Updates subscription, then no further renewal fees will be due, and the user's access to the Price Tracker™ service\*, telephone and email technical support and all software upgrades will cease on the anniversary of the payment of the last subscription.

Price Tracker™ connects EstimatorXpress® to key building materials and prices via www.hbxl.co.uk. Optional links to selected merchant products & prices via www.hbxl.co.uk (where available from time to time) are a chargeable annual service on top of your HBXL Support & Updates subscription.

Technical support

Technical support for EstimatorXpress® is available upon software registration by E-mail via support@hbxl.co.uk or by telephone on 0845 1234 085 with a valid EstimatorXpress® HBXL Support & Updates subscription. Please also view our website www.hbxl.co.uk for further information on telephone technical support options and training.

Telephone support is normally provided between the hours of 9:00am and 5:30 pm Monday through to Friday (excluding Bank and other public holidays). The Company will use its reasonable endeavours to deal with telephone enquiries as soon as possible.

Technical support shall not include the diagnosis and rectification of any fault resulting from the improper use operation or neglect of EstimatorXpress®, the modification of EstimatorXpress® or its merger (in whole or in part) with any other unauthorised software, the failure of you to implement upgrades or recommendations in respect of all solutions to faults previously advised by the Company, any repair adjustment alteration or modification of EstimatorXpress® by any person other than the Company without the Company's prior written consent, any breach by you of any of your obligations under this Licence or the use of EstimatorXpress® for a purpose for which it was not designed.

#### Licence

Unless otherwise stated on the CD-ROM, disk or invoice, you have acquired a single user licence, which means that you must only install on one PC only. House Builder XL Limited hereby grant you a non-exclusive non- transferable licence to use EstimatorXpress® on the terms and conditions herein contained. This licence is personal to you or your company and you may not assign part with or sub let or grant any right or interest in this licence to any other party. You may not copy or alter EstimatorXpress® or transfer it into any other medium. You may not alter, decompile, reverse engineer, disassemble or reverse translate or in any other way derive any source code from EstimatorXpress®. This single user licence for EstimatorXpress® is for your personal use only and you may not under any circumstances use this to provide third parties with estimates. House Builder XL Limited reserve the right to withdraw use of the software should users be in breach of this licence condition at any time at their absolute discretion.

#### Limited Warranty

The Limited Warranty is included in the cost of the software. House Builder XL Limited, (The Company) warrants that EstimatorXpress® will perform substantially in accordance with the accompanying written materials for a period of ninety (90) days from the date of receipt.

EstimatorXpress® are products in a range available from the Company and whilst the Company makes every reasonable effort to ensure that their products are compatible and will interface with each other, no warranty is given in this respect and by accepting this licence in EstimatorXpress® it is on the basis that its functionality will only be as a stand alone product.

#### **Customer Remedies**

The Company and its suppliers entire liability and your exclusive remedy shall be, at The Company's option, either (a) return of the price paid, or (b) repair or replacement of EstimatorXpress® that does not meet this Limited Warranty and which is returned to The Company with a copy of the receipt. This Limited Warranty is void if failure has resulted from accident, abuse or misapplication. Any replacement software will be warranted for the remainder of the original warranty period or thirty (30) days, whichever is longer.

#### No Other Warranties

To the maximum extent permitted by applicable law, The Company and its suppliers disclaim all other representations, warranties, conditions or other terms, either expressed or implied, including, but not limited to implied warranties and/or conditions of merchantability and fitness for a particular purpose, with regard to EstimatorXpress®, and any accompanying written materials. This Limited Warranty gives you specific legal rights.

#### Limitations of Liability

YOUR ATTENTION IS IN PARTICULAR DRAWN TO THESE PROVISIONS FOR LIMITATIONS OF LIABILITY.

To the maximum extent permitted by applicable law, in no event shall The Company or its suppliers be liable for any damages whatsoever (including without limitation, direct or indirect damages for personal injury, loss of business profits, business interruption, loss of goodwill, loss of business information, pecuniary loss) arising out of the use of or inability to use this product, even if The Company has been advised of such damages. In any case, The Company and its supplier's entire liability under any provision of this agreement shall be limited to the amount actually paid by you for the software.

The Company gives no warranty or service level commitment as regards technical support.

#### Entire Agreement

This is the only and entire agreement between you and House Builder XL Limited in relation to EstimatorXpress®. It cannot and shall not be capable of modification unless in writing and signed by you and an authorised officer of House Builder XL Limited

#### Governing Law

This Agreement shall be governed by and construed in all respects in accordance with the laws of England and Wales and the parties submit to the exclusive jurisdiction of the English Courts.

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior permission in writing from HBXL.