ConEst Software Systems
Helping the Electrical Industry TAKE OFF

IntelliBid Release Notes v8.1 December 2017

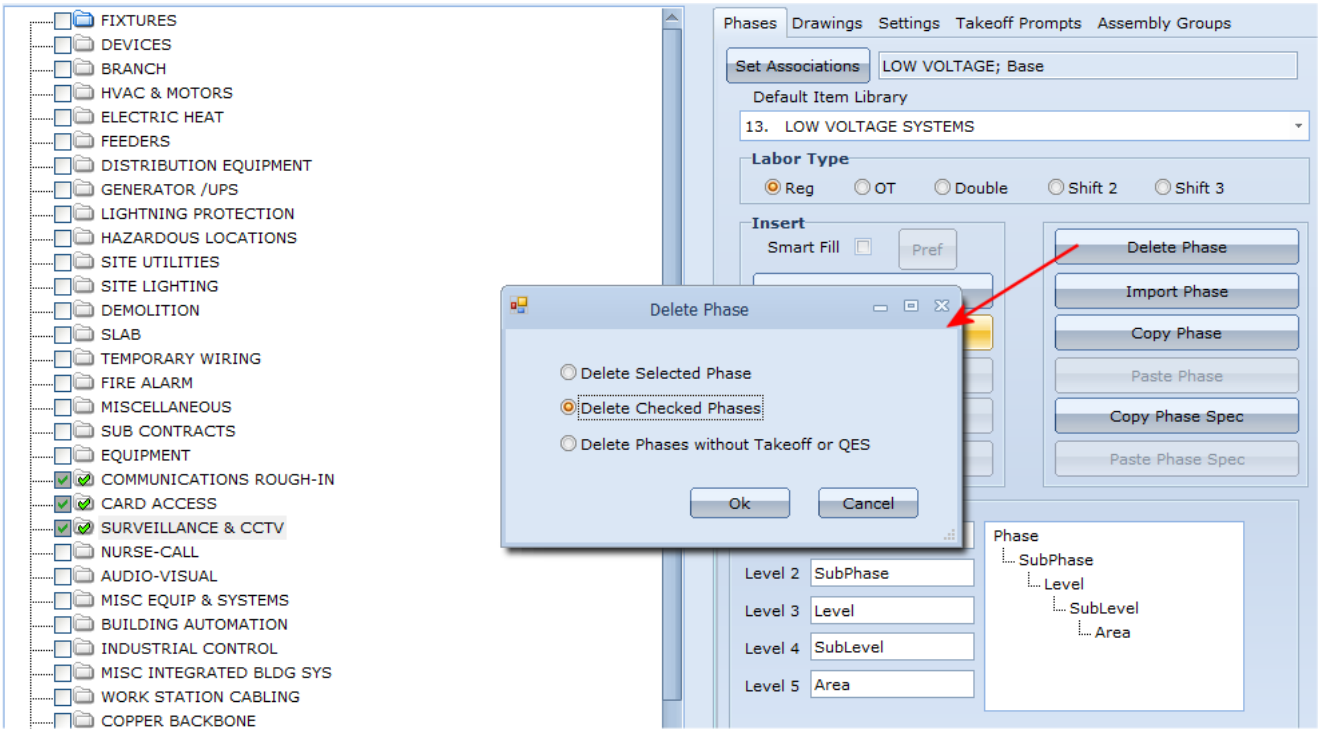
Takeoff

NEC Code Tables for 2017

The 2017 NEC Code tables have been incorporated into IntelliBid.

Ability to Delete Multiple (or all empty) Phases at Once

A new job loads the full Phase Tree. When you have not modified the Master Phase Tree, there are 50 Phases covering all options from Residential to Low Voltage, Medium Voltage and Electrical. To be more efficient, you may want to remove any Phases that do not apply to a job. You could always delete Phases; however, this version provides you the option of selecting all the Phases you want to remove from this job or to delete all Phases without takeoff assigned.



Takeoff Accepts 0 (Zero) Quantity Without a Prompt

In Takeoff - Phase Tree/Job Spec - Takeoff Prompts tab, you can pre-select the answers to Takeoff Prompts to save time during the Takeoff. There are some situations where a quantity of zero is the desired answer. An example would be Field Bends; if you do not use field bends, add the Field Bend variable with a value of 0 and the prompt box unchecked.

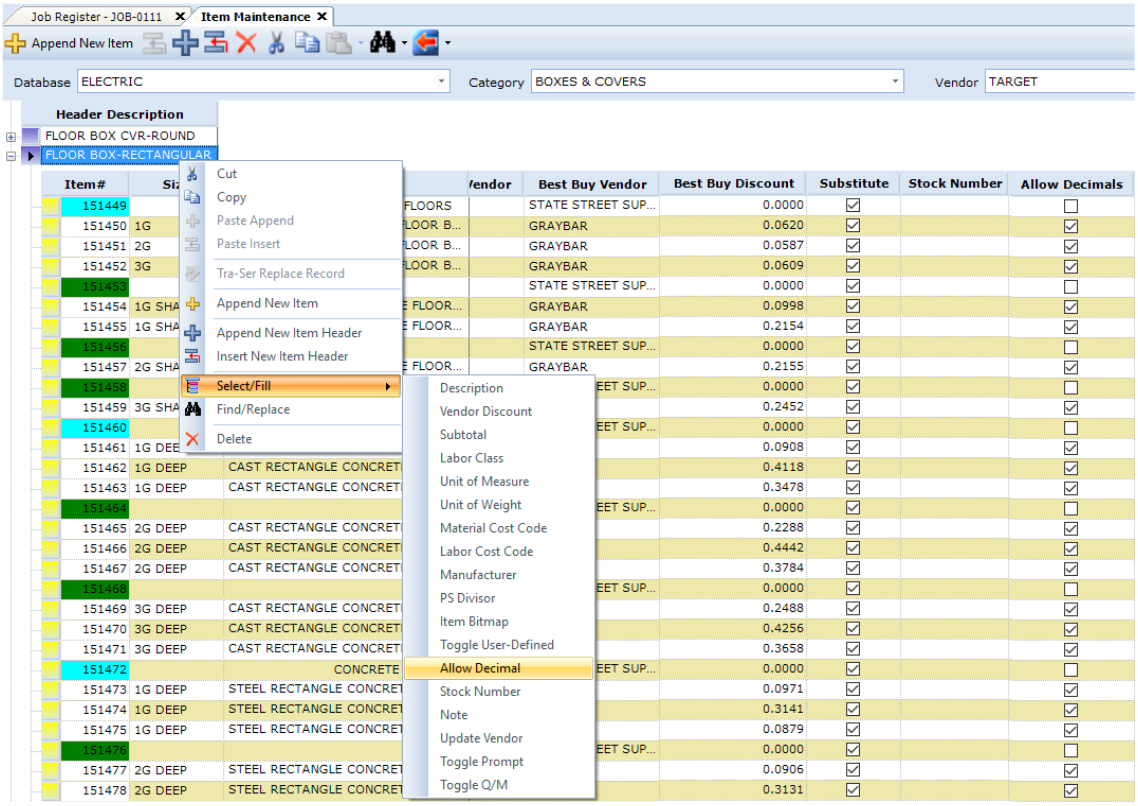
Option to Allow Partial Quantities in Takeoff

Previous versions of IntelliBid rounded quantities up to whole numbers for all items taken off. This was done to prevent confusion with purchasing 100.6 couplings, for example. However, sometimes it makes sense to take off partial quantities; concrete when yardage may calculate to 10.5 yards or assemblies where partial quantities give more accurate results.

This option allows partial quantities on specific items while still rounding other items up to appropriate whole numbers. In Item Maintenance, check “Allow Decimal” to calculate that in Takeoff with partial quantities. There is also a Header Fill option to check for all items in a Header.

Note: *The exception to the partial quantity setting is that a formula that includes rounding as part of the formula will round the final quantity.*

See the legend in Formulas/Variables Maintenance for the formula notation.

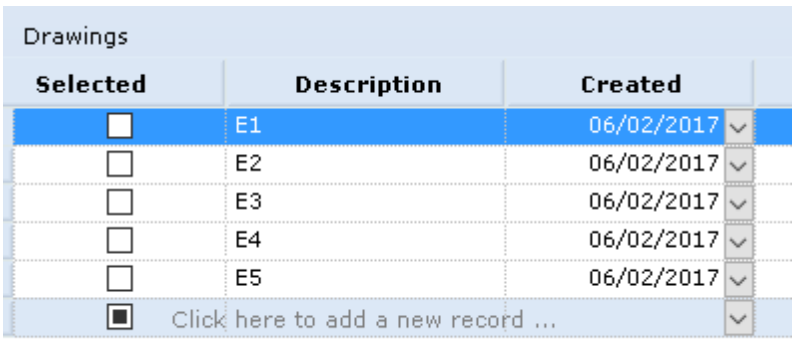


Copy Drawing Names From an Excel Spreadsheet

Another feature to help make Job setup quicker is to import the Drawing Description and Date from an Excel spreadsheet. In Excel, enter the Drawing Description and Date in the first 2 columns.

	A	B
1	E1	6/2/2017
2	E2	6/2/2017
3	E3	6/2/2017
4	E4	6/2/2017
5	E5	6/2/2017
6		
7		

Highlight the cells, click the right mouse button and select ‘Copy’.
In IntelliBid Phase Tree/Job Spec > Drawings tab, right click and select 'Paste' to apply those values.



Set Default Library on Multiple Phases Simultaneously

In Phase Tree/Job Spec, a default item library can be assigned to each Phase. In previous versions, you could apply the change to any one Phase and all of its child Phases, but not to multiple Phases. Now you can select as many Phases as you want, select the default library and it apply it to all of the selected Phases with the option to apply it to SubPhases.

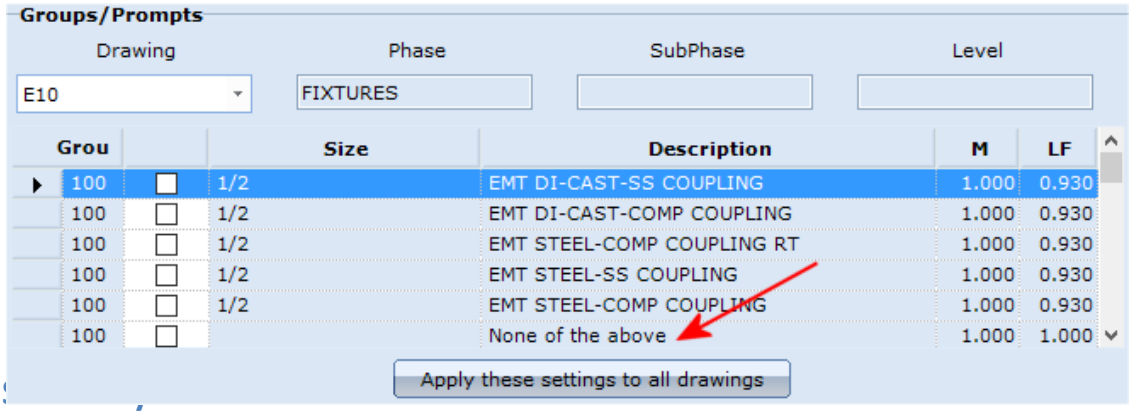
Adjust Assembly Group Selection Dialog Box to Data Shown

In Takeoff, when selecting an assembly with many assembly groups, you'd have to scroll to see all the options. In v8.1, the size of the window has been lengthened to view more options without scrolling.

Count Sheets

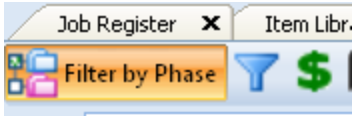
Assembly Groups Include Option "None of the Above"

The "Assembly Groups" tab in Phase Tree/Job Spec has provided the option for 'None of the above' for every group. There are some assembly groups where the user may not want any of the options. This option wasn't available previously in Count Sheets. When a user would not select any of the options, the 'Enter Takeoff Values' window would appear and force them to select an option before takeoff would occur. This allows them to select 'None of the above' in Count Sheets saving time and aggravation.



Visual Indicator When Summary is Filtered by Phases

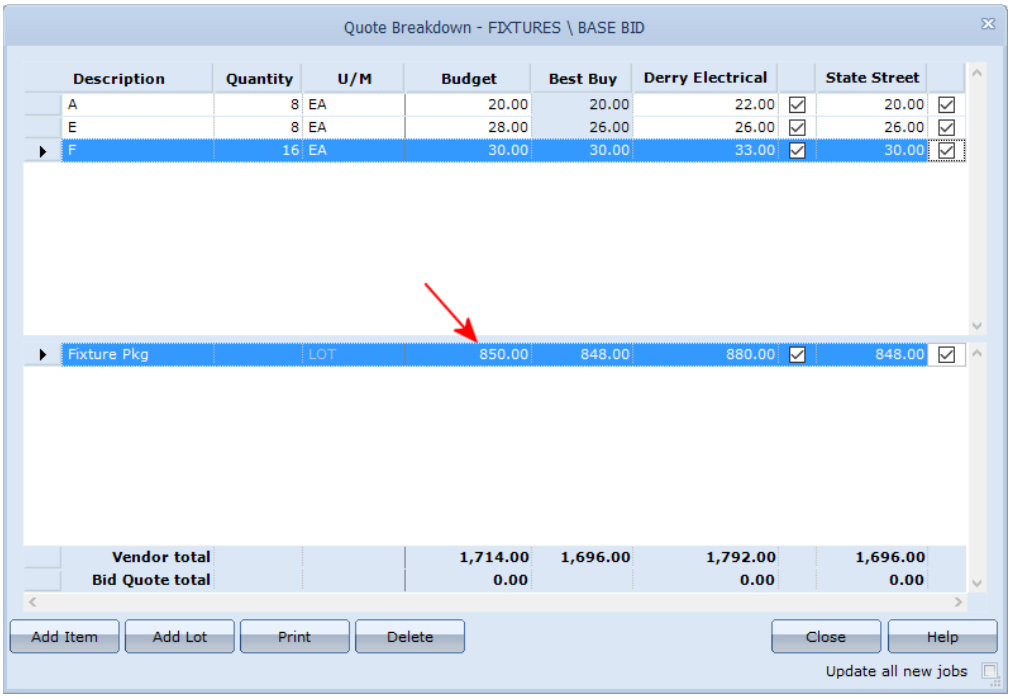
The Summary window can be filtered by Phase and/or Cost Code to show only specific parts of the takeoff. Now when you filter the Summary items, the Toolbar button for Phase and Cost Code displays an orange background when a filter has been set.



Quotes

Ability to Add "Lot" Pricing to Budget in Quote Breakdown

Quote Breakdown pricing can be entered by item or by lot (grouping of items). Pricing by Item always had a field to enter a budgeted value quickly. Now Lot pricing also has a **Budget** value field allowing you to enter a budget amount by Lot.



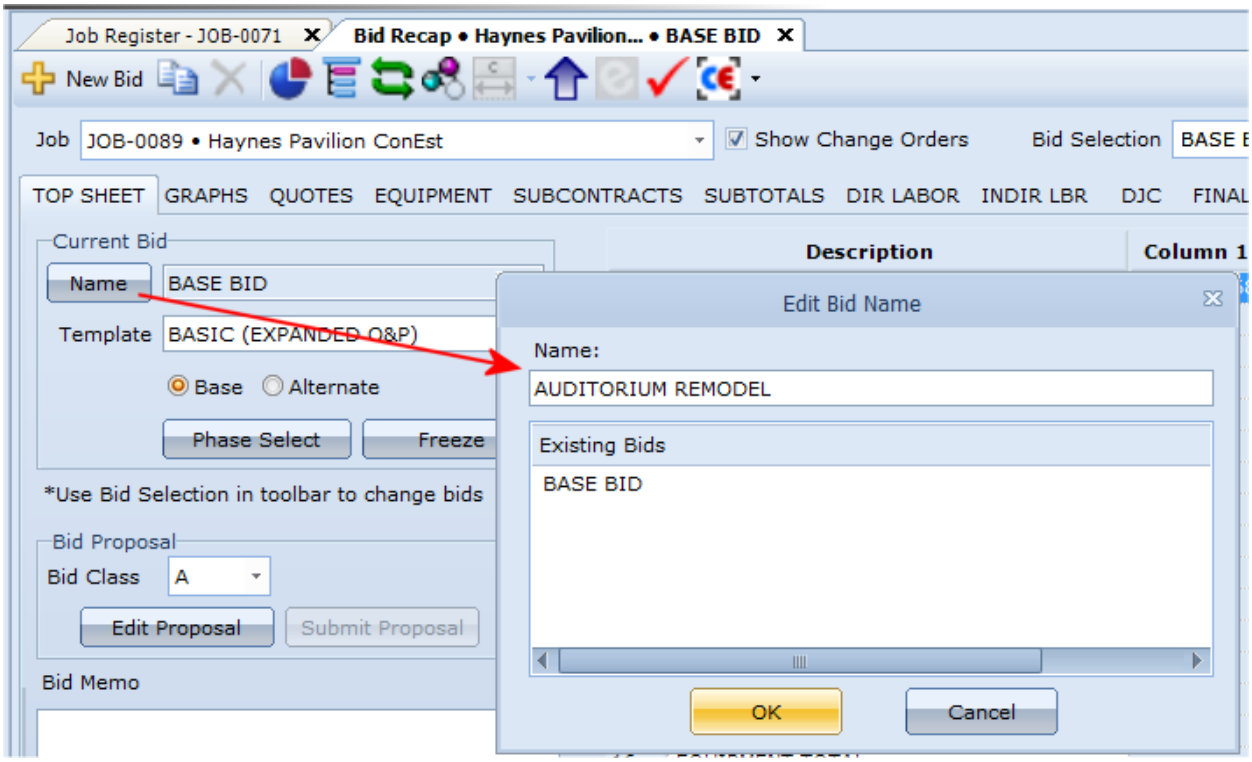
Resize Columns in Quote Breakdown

In previous versions, Quote Breakdown columns could not be resized. In v8.1 the columns can be resized and new column widths will remain as the default for all jobs until you change them again.

Bid Recap

Edit Existing Bid Names

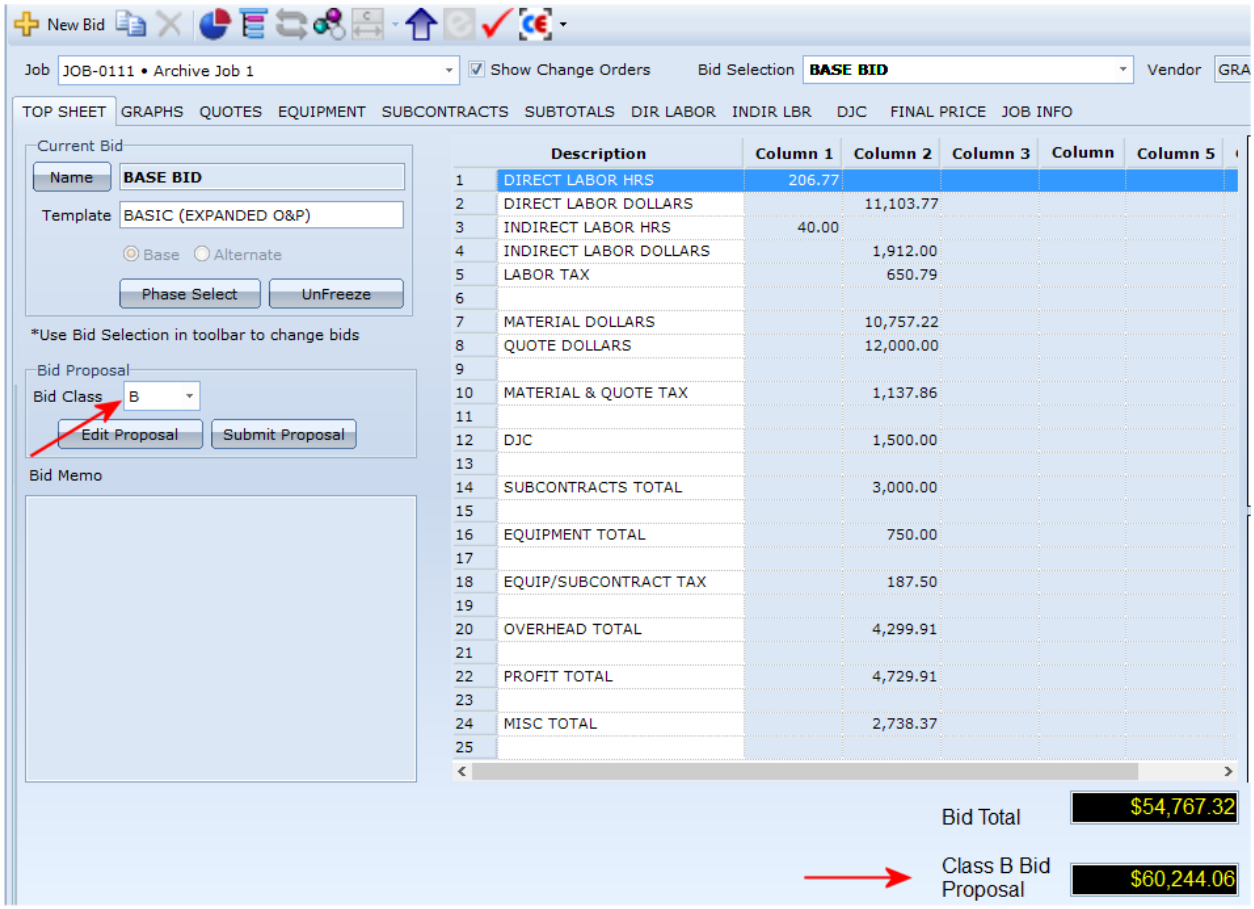
Bid Names can be changed after a bid is created. On the Top Sheet tab in Bid Recap, there the "Name" button to the left of the Bid Name. When clicked, the *Edit Bid Name* dialog box is displayed allowing you to change the name of an existing unfrozen bid.



Display Bid Class Totals on the Top Sheet tab

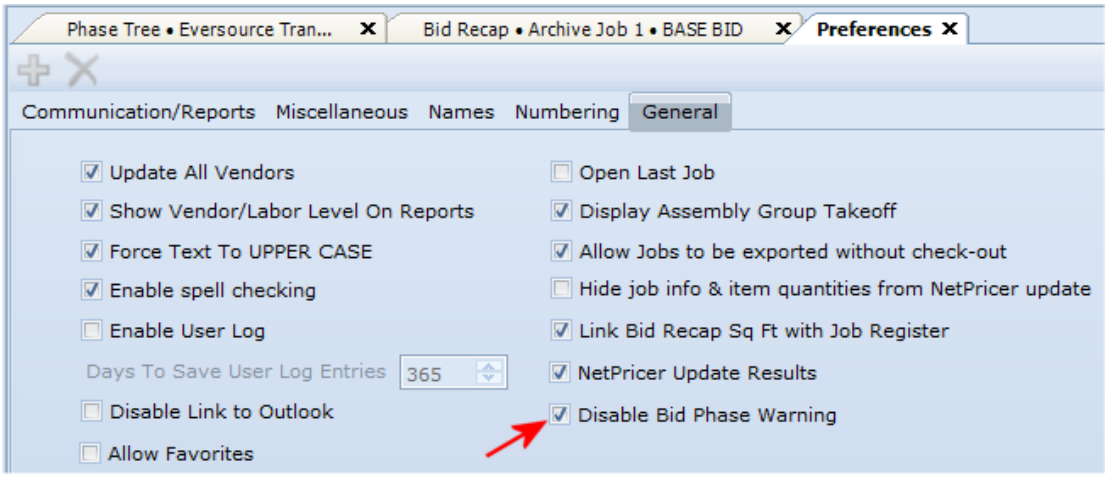
IntelliBid gives users the ability to adjust pricing according to bid class. Those bidding contractors most likely to give the user the job would be given the best price, Bid Class A, while others who tend to give the jobs to someone else, will be given a higher price. The problem has always been that the bid total on screen did not match the adjusted Bid Class Total. Version v8.1 displays both the Bid Total and the Bid Class Total selected.

Note: *The Bid Class Percentages can be set globally in Maintenance > Preferences or for an individual job in Job Register > Job Info tab.*



Option to Turn Off Bid Phase Warning Message

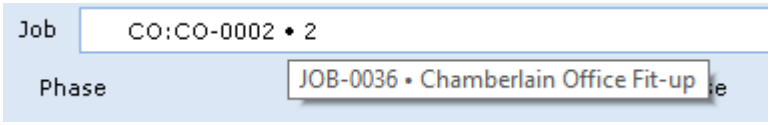
When working on bids with alternates, typically you would exclude some of the Phases from the Base and Alternate bids. Bid Recap displayed a message each time you launched Bid Recap to remind you not all Phases with Takeoff were included in the bid. The message is meaningful as a precaution to ensure all Takeoff is accounted for. However, as you become experienced with IntelliBid, these messages may not allow you to work efficiently. In Preferences, you can disable the warning message. With “Disable Bid Phase Warning” preference selected, this message will appear only once per session.



Job Register

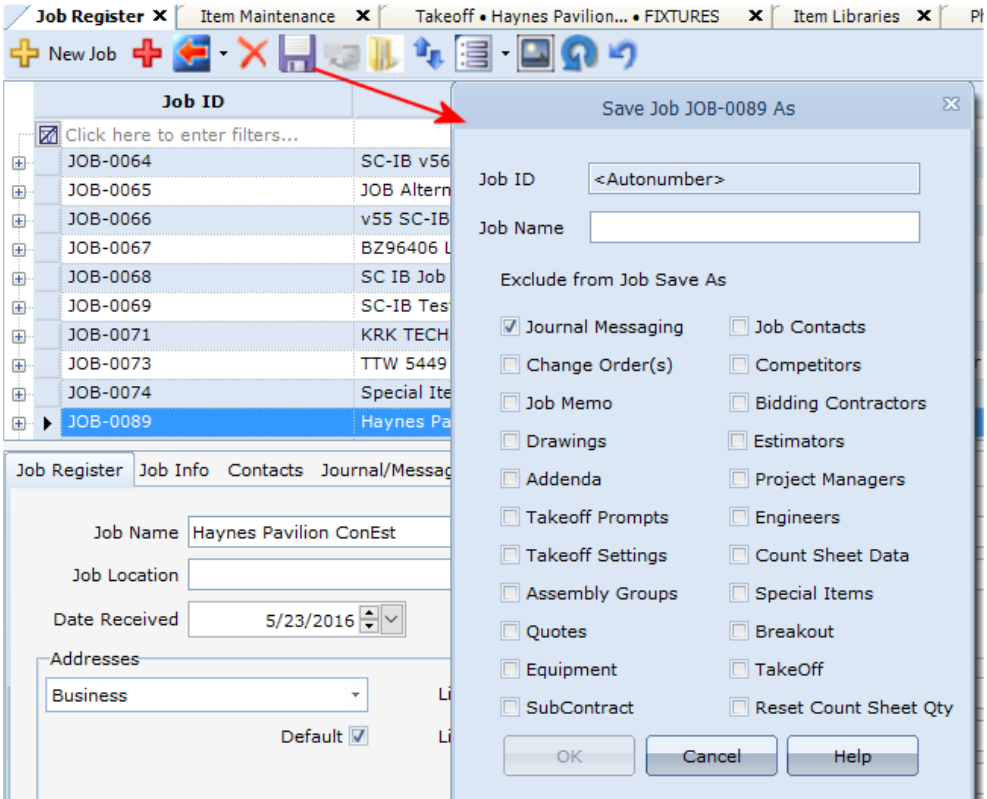
Show Job ID and Name for Job Drop-Downs in Change Orders

Change Orders perform and appear like the parent job which can lead to confusion. Now the Job ID and Job Name display when the mouse is held over the drop-down list.



Ability to Exclude Portions of a Job During Job Copy

An extremely powerful new tool allows you to re-use jobs, choosing the parts of the job you do not want to include in the new job, such as Change Orders, Count Sheet data, Breakouts, etc. In previous versions, **Save As** did not include any communications in Journal/Messaging. Now you have the option to include them. This is most useful when a new job is very similar to a job that was already bid, such as a big box stores. Instead of copying and pasting into a new job, you can now perform a 'Save As' and exclude any portion of the job that doesn't apply.



Select/Deselect All to Add or Remove Contacts to a job

On the Contacts tab in Job Register, you can now assign all contacts for a company with one click, making the job setup quicker.

Ability to Add 'My Company' to List of Competitors

Since the user is competing for the job, it only makes sense that they would be included as a "Competitor" on the Job Register > Competitors list.

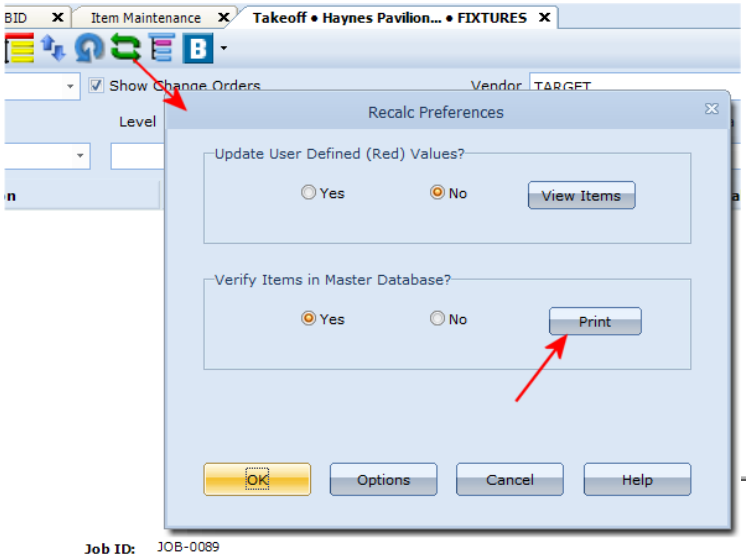
Improved recalculation for importing jobs from older databases

When a job is imported that was originally created in a older database (originated from v6 or earlier), the system wasn't correctly matching up the items to those in the new database. Now, when the older database is on v8.1 and the user recalculates the job before exporting, importing that job into a new database will find the correct items.

Maintenance

New Verify Takeoff Items Report

When a job is imported from a different database, there is a probability that some items in the job will match the items in the target database. After import, you should run Recalc to match the items to the target database items. The **Print** button on the *Recalc Preferences* dialog box will run a Verify Items report. This report lets you view what those items and replacements will be ahead of time in case they would like to make the replacements via the 'Replace' option in takeoff.



Job ID: JOB-0089
Project: Haynes Pavilion ConEst

PROGRAMMED
Electrical Technologies

Verify Items for Recalculation

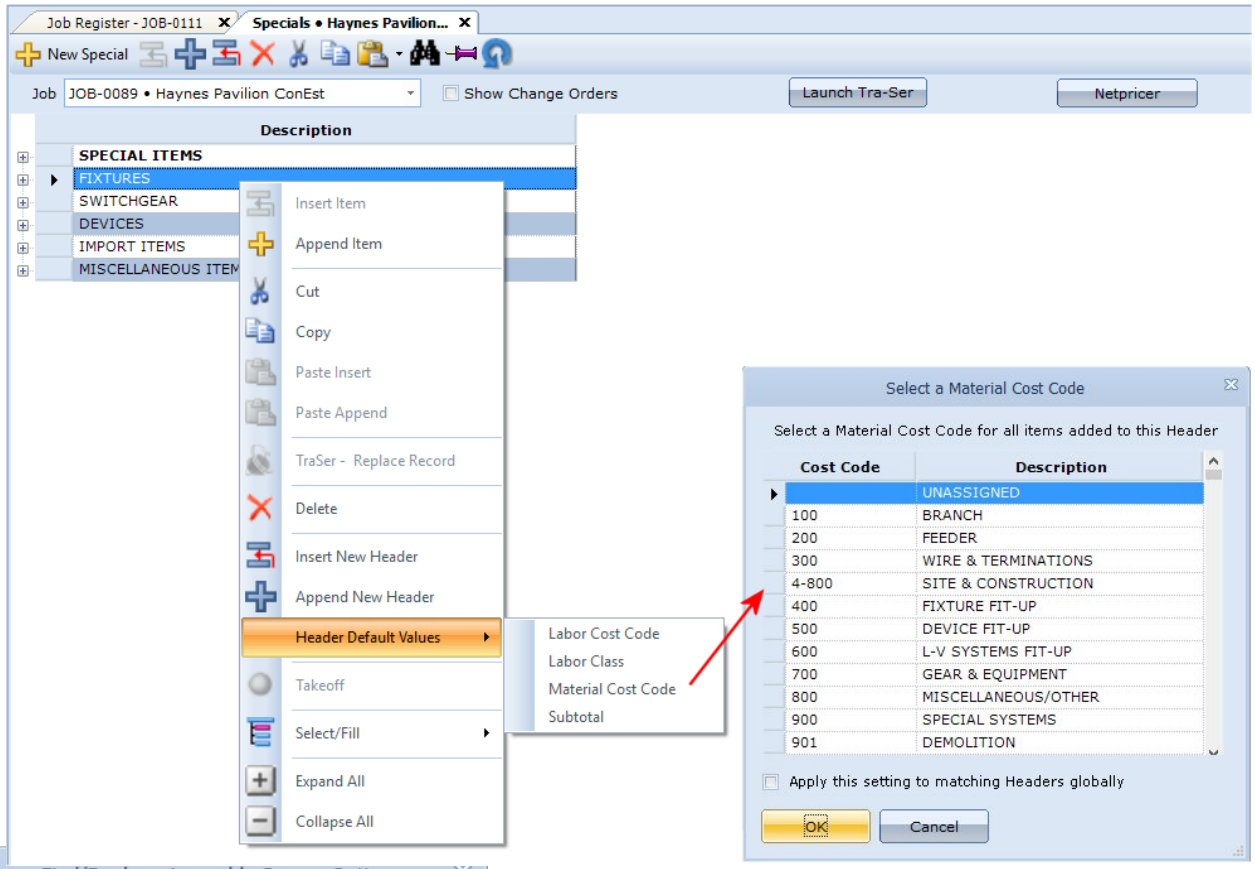
Vendor: TARGET — **8 Sep 2017 17:27:15**

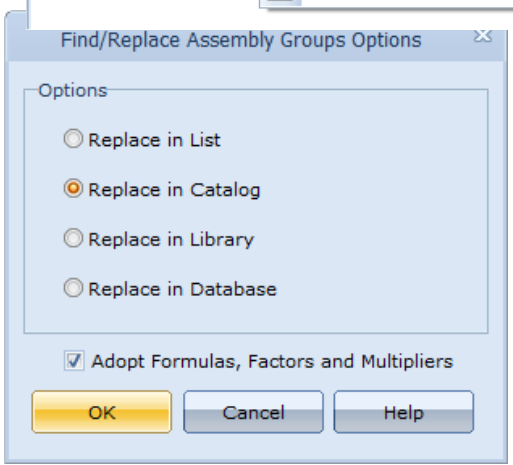
	Material Currently In Takeoff				Material After Recalculation		
Item #	Size	Description	UPC	Recalc	Size	Description	UPC
20022	3/4	GRC 90-DEG ELBOW	98002000162	☐	3/4	GRC 90-DEG ELBOW	662427001628
20022	3/4	GRC 90-DEG ELBOW	98002000162	☐	3/4	GRC 90-DEG ELBOW	662427001628
20027	2 1/2	GRC 90-DEG ELBOW	98002000167	☐	2 1/2	GRC 90-DEG ELBOW	662427001673
20027	2 1/2	GRC 90-DEG ELBOW	98002000167	☐	2 1/2	GRC 90-DEG ELBOW	662427001673
20027	2 1/2	GRC 90-DEG ELBOW	98002000167	☐	2 1/2	GRC 90-DEG ELBOW	662427001673
20030	4	GRC 90-DEG ELBOW	98002000170	☐	4	GRC 90-DEG ELBOW	662427001703
20030	4	GRC 90-DEG ELBOW	98002000170	☐	4	GRC 90-DEG ELBOW	662427001703
20749	1 1/4	EMT 90-ELBOW	98002002024	☐	1 1/4	EMT 90-ELBOW	662427020247
30284	1/2	EMT STEEL-SS COUPLING	78174700240	☐	1/2	EMT STEEL-SS COUPLING	78456410460
30284	1/2	EMT STEEL-SS COUPLING	78174700240	☐	1/2	EMT STEEL-SS COUPLING	78456410460
30286	1	EMT STEEL-SS COUPLING	78174700242	☐	1	EMT STEEL-SS COUPLING	78456410462
30400	1/2	EMT STEEL SS CONNECTOR	78174700230	☐	1/2	EMT STEEL SS CONNECTOR	78456410450
30400	1/2	EMT STEEL SS CONNECTOR	78174700230	☐	1/2	EMT STEEL SS CONNECTOR	78456410450

Assign Subtotals, Cost Codes & Labor Classes to Headers in Special Items Maintenance

Special Items are assigned default values for **Subtotal** (99), **Labor Class** (Electrical) and **Cost Codes** (Unassigned). Any changes made to the first item added to a Header would set the defaults for all new items added after that. However, too often these settings are not applied, leaving all the Special items with no Cost Codes and a Subtotal assigned to Miscellaneous. This new feature gives you the ability to set the defaults for each Special Item Header *once* for all your jobs.

The Right-click menu in Special Items has a new selection: "Header Default Values" with 4 sub-menu selection for Cost Codes, Subtotal and Labor Class. All items added after these are set will be set to the selected default values (existing items will not inherit the new defaults). There is a check box to make these settings global; meaning those values will be applied to any special item added under that header in any job, new or existing.





Option to Adopt Formula & Factors on Assembly Group Replace

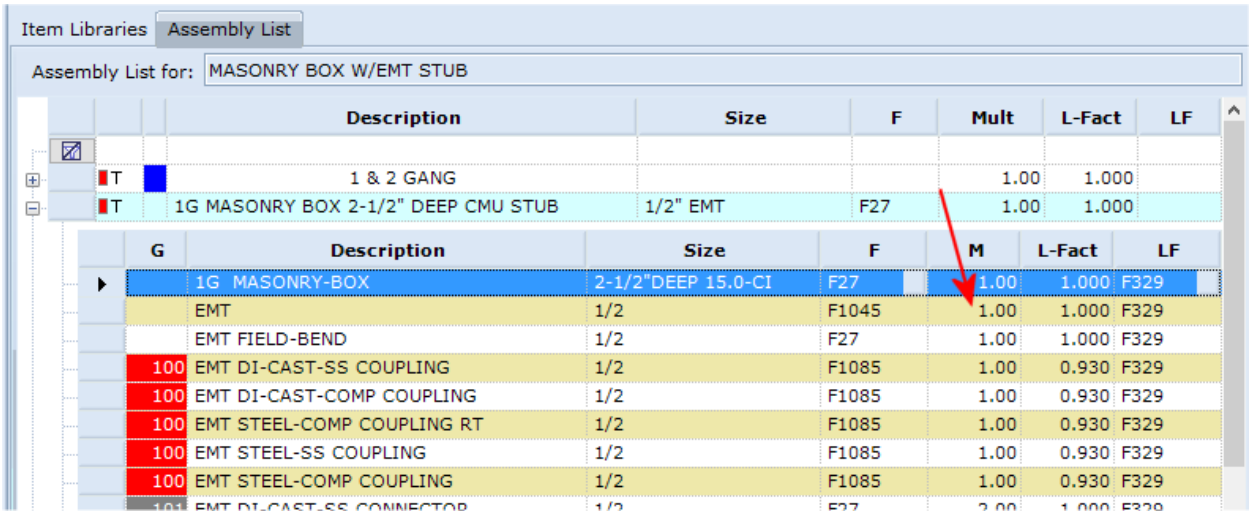
There was an occasion where we found it necessary to replace a single item with an assembly group in Item Library Maintenance. Not all of the items in the assembly had the same formula, so the

replacement needed to adopt the formula, multiplier, L-Factor and Labor Formula from the original item and apply it to all the items in the assembly group. There is now an option on the "Find/Replace Assembly Group Options" in Item Library Maintenance to "Adopt Formulas, Factors and Multipliers". When checked, the formula, factors and multiplier for the item selected item in the Assembly Group is used to replace those values in the target assemblies.

Note: *It can take a long time to complete the replace; plan to use this feature accordingly.*

Allow Negative Multipliers in Item Library Maintenance

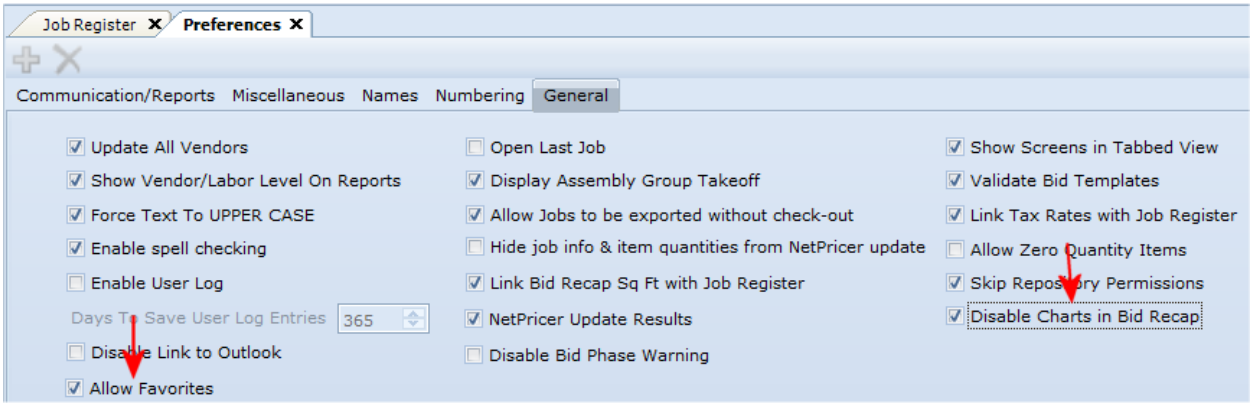
A requested feature is to allow a negative quantity for an item as a result of taking off the assembly. To accomplish this, enter a negative value in the 'M' cell in Item Library Maintenance.

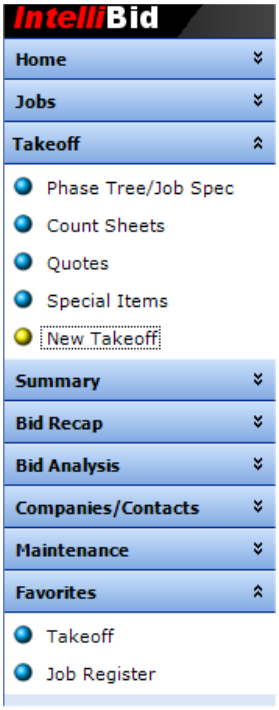


'Find and Replace' in Item Library Maintenance now includes 'Size'

In item Library Maintenance, right clicking on any assembly will bring up an option for 'Find and Replace'. Previously you could only replace the description, formula, or labor formula. We've added 'size' which means the user can now replace text found in the size cell for any assembly list

Added two Preferences for a Menu Favorites Section and Hide the Charts in Bid Recap

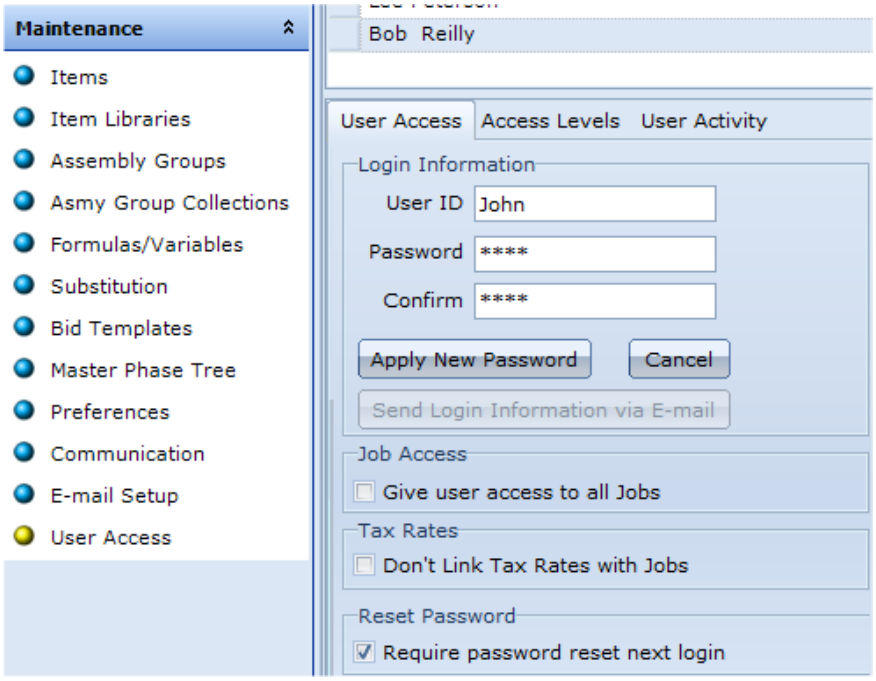




- Set as a Preference, a section on the menu will store the sections of the program you use most. In Maintenance > Preferences, check Allow Favorites. A Favorites menu section is displayed on the menu and loaded with the sections you use.
- When the "Disable Charts in Bid Recap" preference is checked, the graphs displayed on the Top Sheet are not visible allowing more room to the Top Sheet columns.

Admin User Can Prompt Users to Change Their Passwords

Admin Users, those with the rights to User Access, can prompt any user to change their password on the next login.



Removed 'Defrag' Option on Database Upgrades

Previously, upgrading to a newer version of IntelliBid required a defragmentation of indexes which sometimes lasted for hours. The Admin Utility has an option to defragment databases so we've removed the defrag option from the database conversion routine making upgrading to new versions much faster. If a customer feels they want to defrag before upgrading they have the Admin Utility to do so.