Trimble®
Accubid Classic
Software

⊕ Trimble®

Getting Started Guide

Trimble®
Accubid Classic
Software

❖Trimble

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Release Notice

This is the TRIMBLE® ACCUBID CLASSIC SOFTWARE GETTING STARTED GUIDE. (Revision A).

The topics within this manual are:

- Subject to change without written notice.

- Companies, names, and data used in any examples are fictitious.

- Screenshots included in the help topics may not be exactly as in the software application.

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Contents

Classic Software

- Software Overview
- Preliminary Steps
- Package Inclusions

This guide provides the information you need to:

- Install and run your Trimble Accubid Classic program and related components

- Check or set the number of licenses available on your network security server or on your local security device

- Familiarize yourself with the Trimble Accubid estimating program, and associated modules

This guide assumes that you have a basic familiarity with the Windows Operating Systems, and with associated terms and procedures. If you are not, Trimble recommends that you take a class through your local college or computer training centers.

Software Overview

Because the family of Trimble estimating software consists of several programs and tiers, the program name displayed in the screens are specific to the program you are working in. In this guide, whenever you see *program*, substitute it with the appropriate program being used.

The Trimble Accubid Classic software covers a wide range of needs. Each tier of the program builds upon the previous tier giving you added functionality. The Classic program tiers are listed below. For more information and product comparisons, please refer to the Trimble® Accubid Classic Estimating page on our website (mep.trimble.com).

• PowerBid

• BidWinner

• BidWinner Plus

• Pro

The module available to you is based on the licensing options purchased. If at any time you wish to upgrade from your current tier to one with additional functionality, please contact your Trimble Sales Representative.

Additional Modules Available

Depending on the details of your purchase, the software modules listed below may also be included with your Classic software product. If you do not have access to these modules and are interested in information about them, please contact your Trimble Sales Representative for more details.

• ***Time & Material Billing***

  The Time & Material Billing software is a powerful, yet easy-to-use computerized billing system designed for service contractors. Designed to help you accurately cost your service work, the application offers many features specific to your business needs including unique customer information and pricing, invoicing, and the ability to monitor the day to day activities of your ongoing service work.

  The Trimble Accubid Time & Material Billing software allows you to:

  – Create/complete work orders

– Finalize the billing, and generate professional-looking invoices.

– Measure and monitor your service business, tracking resources, invoices, and profitability.

– Maximize profit margins and improve cash flow by streamlining the service management process

– Review the total costs and produce your formal printed billing reports for work orders, invoices, credits, and quotes

– Additionally, the Time & Material Billing software includes an interface with the Trimble® Work Management application.

• *ChangeOrder/ChangeOrder Pro*

The ChangeOrder program allows you to effectively manage contract changes, track change notice status, generate accurate cost data for each change notice, expedite the approval process, and minimize rejections.

Note – Trimble provides both a ChangeOrder program and a ChangeOrder Pro program. Throughout this guide, whenever you see ChangeOrder program, it refers to both tiers of the software. In cases where a feature applies specifically to one of these programs, it is presented as such.

The ChangeOrder software allows you to:

– Store unit prices, labor rates, overheads, and markups for each project

– View the results immediately when totals changes

– Produce consistent and professional-looking change notices

– Send electronic copies of change notices to clients.

Additionally, ChangeOrder Pro provides the following features:

– Equipment screen

– Typical takeoffs

– Designations

– Hot lists

- – Specialized takeoff modules (Fixtures, Electrical Heating, Systems, Controls, Distribution, Ducts and Trays, Branch Conduit and Wire, Feeder Conduit and Wire, Branch Cable, and Feeder Cable).

- – More assemblies in database.

- – Labor Adjustments through audit trail breakdowns.

Preliminary Steps

Before you begin installing your Trimble Accubid estimating program(s), you must verify that your computer meets the minimum system requirements. Refer to the Trimble® Accubid Classic Estimating page on our website (mep.trimble.com) for detailed information.

Package Inclusions

Your product package includes the following:

- • ONE Trimble® Accubid Classic software installation disk. This disk contains the necessary files for installing the different estimating program tiers and related components

- • ONE security device (*new users only*)
  Allows authorized users access to all the features in the estimating program, including the ability to save, print and export.

- • A new customer welcome packet containing written documentation as required.

- • Hard copy *Getting Started Guide*, containing information on all modules

If you are missing any of these items, please contact MEP Client Services at 1-800-361-3030 or by email at accubidsupport@trimble.com.

Installation

In this chapter:

- Install Software
- Time & Material Billing Database
- Security Server
- Security Device
-

From the Trimble® Accubid Classic software installation disk, you can install these program items:

- Classic Estimating tiers Pro, BidWinner Plus, BidWinner, or PowerBid, and optionally:

  – Material database

  – Database Manager module

  – Price Update module

  – Trimble Accubid Supplier Link module

  – Trimble Accubid Network Security Server (including the License Administrator)

- Trimble® Accubid Classic ChangeOrder or ChangeOrder Pro (if you have purchased a software license for this product)

- Trimble® Accubid Time & Material Billing (if you have purchased a software license for this product)
- Trimble® Accubid LiveCount (if you have purchased a software license for this product)
- Trimble® Network Security Server and License Administrator)

Installation Considerations

- Make sure your computer meets the minimum system requirements before you proceed with the installation. Refer to the Trimble® Accubid Classic Estimating page on our website (mep.trimble.com) for detailed information.
- If this is the first installation of a Trimble Accubid program on this workstation, you should complete the installation before attaching the security device. For instructions, Install Software below.

Common Installation Commands

- During the installation process, you will see the following in many of the windows.
- To proceed with the installation and advance to the next window, click **Next**.
- If you want to return to the previous page, click **Back**.
- If you want to discontinue the installation, click **Cancel**. You will be asked to confirm the cancellation. Click **Yes** if this is your intent. If you pressed the Cancel button in error, click **No** and the installation will continue.
- **Finish** completes the installation.

Install Software

The install routine allows you to install various components in a single installation procedure.

1. Log on to your workstation as the workstation administrator (*not* network administrator).

2. Insert the Trimble® Accubid Classic software installation disk into the appropriate drive of your computer. If the installation does not start a few seconds after you insert the installation disk, proceed as follows:

   – Double-click on the **Computer / My Computer** Desktop icon.

   – Locate the drive containing the installation disk. Click on it to display the contents.

   – Double-click *AutoRun.exe* to open the main installation screen.

   ☼ **Tip –** Depending on your computer settings, the file extension *exe* may not display on your computer screen.

   The Trimble installation menu screen displays.

This Trimble installation menu screen allows you to:

– select various software components for installation

– view documentation available with your software (Adobe® Reader® is required)

☼   **Tip –** Although the LiveCount™ software is included on the installation disk. procedures to install the software are included in a separate Trimble® Accubid LiveCount™ Getting Started Guide. If you purchased the LiveCount module, you will receive a hard copy of this guide.

Install Components

This procedure installs the Estimating, ChangeOrder, and Time & Material (Service Management) components on your computer.

1. In the Trimble installation menu screen, click [Install Estimating/ChangeOrder/ Service Management] .
   The installation routine prepares the files for installation. The *Welcome to the InstallShield Wizard for Trimble Accubid Classic* screen displays.
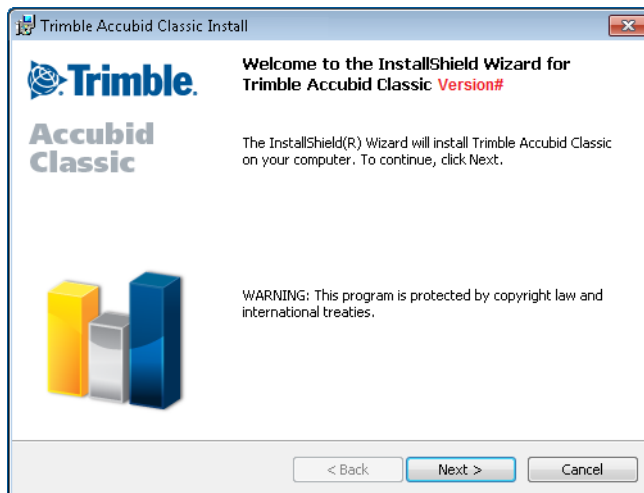
Note – The Version # changes from release-to-release. All release version references have been removed from the installation screens in this document.

Review the information on this screen and then click **Next**.

2. Read the agreement. Click the I *accept the terms in the license agreement* and then click **Next**.
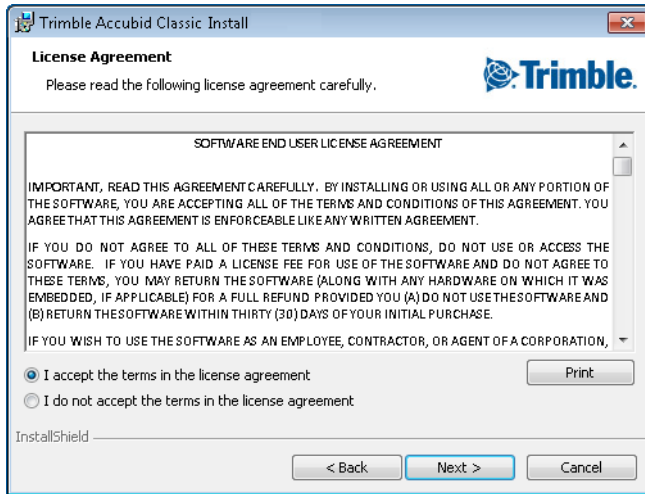
☼ **Tip –** You can click the **Print** button if you want a hard copy of the agreement.

3. The *Custom Setup* screen displays. The Custom Setup screen allows you to choose the Trimble Accubid Classic modules you want to install. You can also specify the installation location.

*Note – The graphic below illustrates several selected components. You should
select the options based on the details of your purchase.*
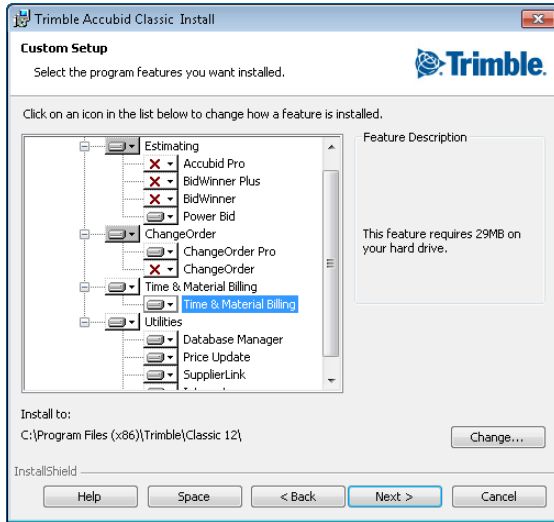
☼ **Tip –** The *Custom Setup* screen offers options to assist you while installing the
software.

– **Help**

When you click this button, a screen displays illustrating how the icons change based on your selections.

– **Space**
Clicking this button shows you how much space is required to install the selected components, as well as the space you currently have available on your various available drives. You should always install in a location with enough available space to accommodate the software application.
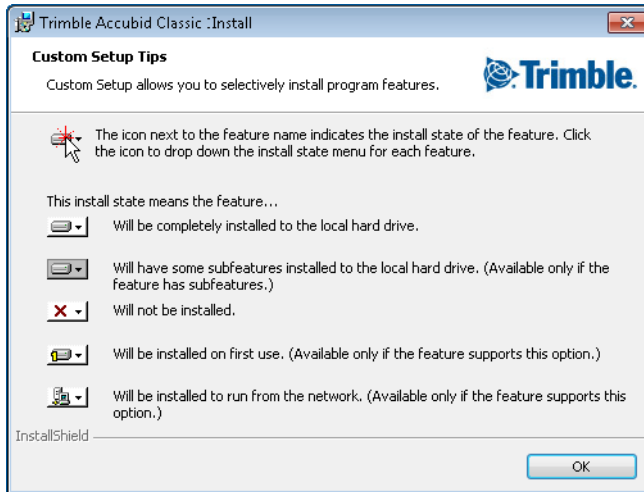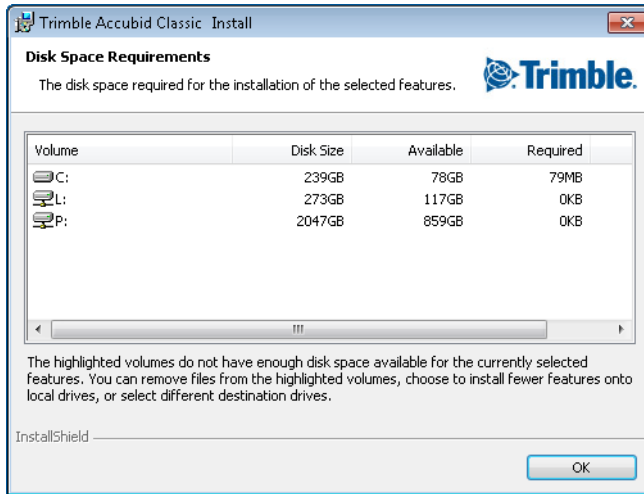

a. Click ▼ next to each application you want to install to select an installation option from the list. The following table illustrates how the icon displays when items are selected/not selected, and so on.

b. You can change the default folder where the software is installed by clicking **Change** *while the component is selected*. ***Trimble recommends that you install the software in the default location.***

4. In the Install Material Database/Default Jobs screen, select or verify the following:

– **Country**
Select the appropriate option button based on your project base.

– **Measurement**
Select the appropriate measurement based on the types of projects you will be estimating.

– The *Install a new material database* checkbox should be selected ✓.

5. the *Ready to Install the Program* screen, click to **Install** to begin installing the selected features.
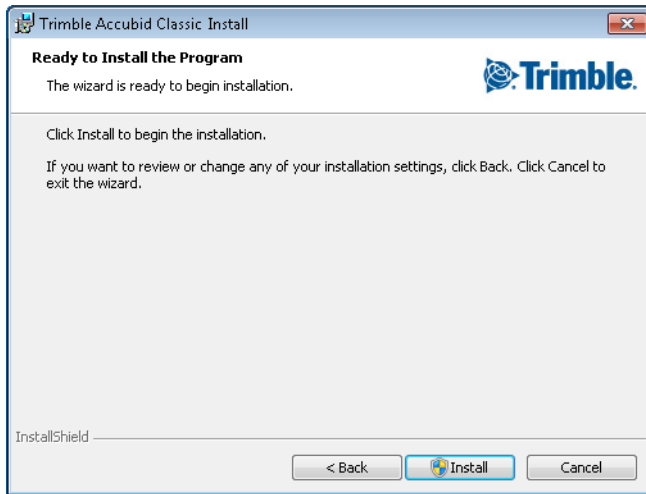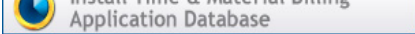
6. The *InstallShield Wizard Completed* screen displays. Click **Finish**.
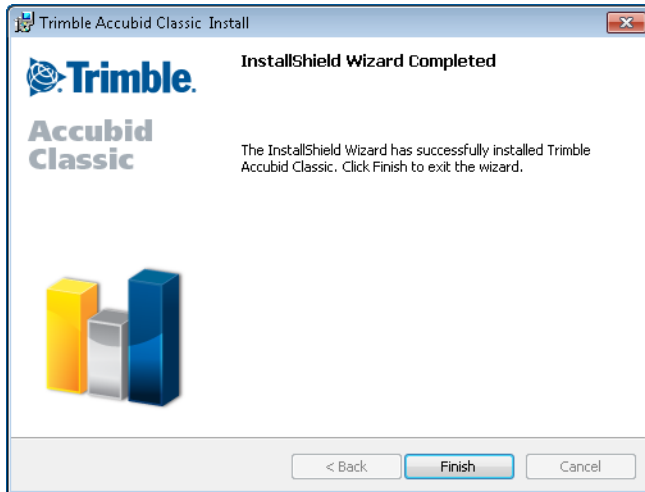
Time & Material Billing Database

If you installed the Time & Material (Service Management) software in the previous step, you must also install the associated database.

1. In the Trimble installation menu screen, click **Install Time & Material Billing Application Database** . The installation routine prepares the files for installation. The *Trimble Accubid Classic SQL Install* screen displays.
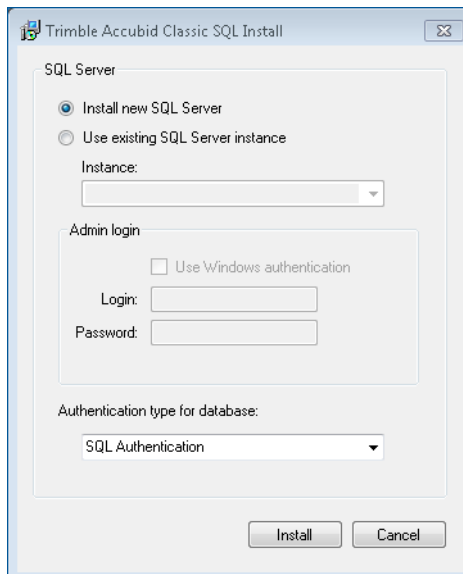
a. Select one of the option buttons:

   Install new SQL Server
   Select this option if you do not currently have an SQL server installed on your system.
   OR
   You want to install another instance.

   Use existing SQL Server instance
   Select this option if you want to use an SQL instance already installed on your computer. Click ▼ to select the SQL Instance you want to use.

b. If you are using an existing instance, and are using SQL authentication, enter the **Login** and **Password** for the instance already installed. If you do not have this information available, contact your IT professional for assistance.

c. In the **Authentication Type for database** field, click ▼ and select a type from the list.

2. In some cases, the *Program Compatibility Assistant* dialog displays. Click **Run the program without getting help** The installation continues.

☼ **Tip –** A reboot of your computer may be required to continue the SQL installation. Do not remove the disk from the drive. The installation will continue when it is restarted.

3. In the SQL Server Setup screen, a progress indicator displays during the installation. Do *not* stop the installation process. When the installation is complete, a confirmation dialog displays. Click **OK**.

Security Server

The Install Network Security Server option on the installation disk allows you to install the files required for licensing your Trimble Accubid Classic software.

• If you are using a central network security server, you must install this software on the network computer. You must also attach the security device to that computer.

• If your workstation will be pointing to a network security server, installing this separate application is not necessary. A security device is *not* required in this case.

• If you are using the workstation in a stand-alone mode (not connecting to a network security server), you must install this software on each workstation. Each workstation must have a security device.

Note – *The security device(s) is included in your software package.*

1. Click . The welcome screen displays. Review the information presented and then click **Next**.

2. In the *License Agreement* screen, click I *accept the license agreement* option button. Click **Next**.

3. The Select Features screen has the appropriate options selected. ***Trimble Recommends that you keep the default selections.*** Click **Next**.

4. In the *Ready to Install the Application* screen, click **Next**. The security and licensing software is installed on your computer.

5. Click **Finish** when the installation is complete.

Close Installation Menu

In the Trimble installation menu screen, click **Exit** to close the screen.

Security Device

To run your Trimble Accubid Classic software program, you must either have a local security device attached to your computer, or be linked to a network security server. Otherwise, the program runs in demo mode, with important features disabled.

- If you are planning to access a network security server installed on another workstation, you can link to the security server from the program following installation.

- If this is the first installation of a Trimble Accubid program on this workstation, you should complete the installation before attaching the USB security device.

- Attach the security device to any of your USB ports. If all your USB ports are currently occupied, you can purchase a USB hub to provide additional USB ports.

CHAPTER | **3**

Getting Started

In this chapter:

- Open Programs
- Estimating Program
- Assistance/Help

This chapter provides an overview of using the Classic Estimating software, including:

- Opening the application
- Connecting to a database
- License Administration
- Software basics for:
    - Classic Estimating
    - Time & Material Billing
    - ChangeOrder/ChangeOrder Pro

Open Programs

Once the installation is complete, you can run the Trimble Accubid Classic programs (based on your licensing). To do this, click **Start / Programs / Trimble Accubid** and then the appropriate program (based on your purchase).

There may be circumstances where a screen may appear before you are allowed to use your program. These are:

• No security device detected

• SQL server or database not found

• No material database detected

These circumstances are discussed in detail below.

Material Database

A database connection is required to run all Classic program modules. This section explains database procedures. Typically, these are required only the first time you open the application.

No Database Detected

A material database is required to create jobs and to run the online tutorial. If you chose not to install a material database, or if the estimating program is unable to find a material database in any of the specified database folders, the following dialog displays.
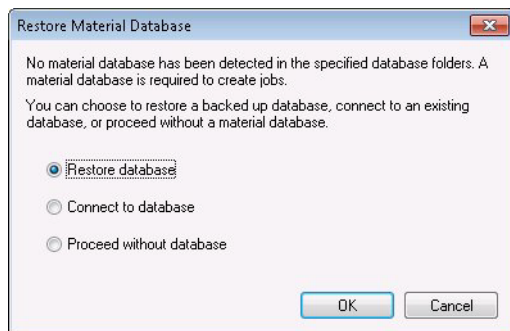
You have the following options:

- **Restore Database**
  This option allows you to restore a backup copy of a material database, if one is available. For instructions on restoring a database, see the online help.

- **Connect to Database**
  This option allows you to connect to a material database that resides in a different folder. You will be prompted to indicate the location of the material database.

- **Proceed without Database**
  This option allows you to run the program without a database. You will not be able to create jobs or run the online tutorial without a database.

Connect to a Material Database

Material databases may be stored in one or more folders on your hard drive or network; however, only those databases stored in folders designated as database folders appear in the database selection screens. To connect to an existing material database, you must add the folder for that database to that list.

1. In your Estimating program, click the **Settings / Database Folders**. The *Database Folders* dialog displays.

2. Click **Add** to display the *Folder Name* dialog. Either enter the full path of the folder or folders where the databases are stored or click **Browse** to navigate to the location.

   – If you're on a network and want to store databases in a shared folder you can specify the computer name along with the folder. For example, if you want to store your jobs in a folder named Program Files\Trimble\Databases on a drive shared as C on a network computer called BIDS, you would specify the job folder as follows: \\BIDS\C:\Program Files\Trimble\Databases

   – To share a database folder located on another computer, the folder must be shared with either read only or read and write access.

3. Click **OK** to add the folder and to return to the *Database Folders* dialog. The new folder is now available and selected in the list.

4. In the *Database Folders* dialog, click **OK**.

Additional Material Databases

A material database stores the prices, discounts, material conditions, labor units, and assemblies required by your program for accurate estimating and billing. The material database is typically installed as part of the main program installation. If, however, you chose not to install a material database, or wish to install an additional database, you can install one using Windows Explorer.

To install a material database after the program has been installed:

• Use Windows Explorer to locate the appropriate database folder (e.g. ELEC USA NECA IMP) under the Databases directory on the Trimble Accubid Classic software installation disk.

• Copy the database folder and paste it onto your hard drive under C:\Program Files\Trimble\Databases\ or C:\ProgramData\Trimble\Databases, depending on your operating system.

When you next run your ChangeOrder program, you can connect to the new database using the instructions below.

SQL Server or Database Not Found

Required for Time & Material Billing

The Time & Material Billing software stores company information in a SQL Server database. When you first run either Time & Material Billing application, you will be prompted to indicate the location of the SQL Server and select the company database you will be using.
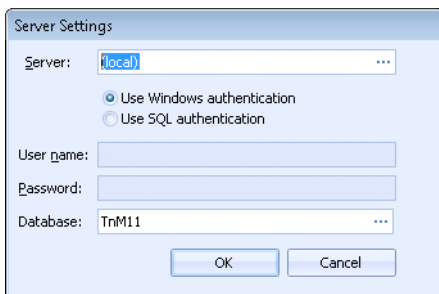
> ☼ **Tip –** To provide better database security, Trimble recommends that you select
> **Use SQL authentication**. The default username and password follow:
>
> **Username**:   accuser
>
> **Password**:   cla55ic!

The Server Settings dialog will display if the specified server or database cannot be found when you run the Time & Material Billing application.

Security Device

In order to use the Classic Estimating program, a security device is required. This device is included in your new user packet.

No Security Device Detected

If you try to run the program without either attaching a local security device or linking to a network security server, the following warning appears.
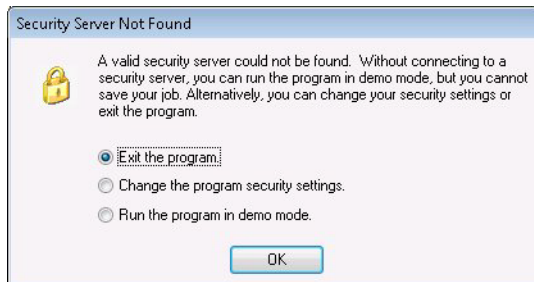
- If you are using a local security device and this message appears, the security device may not be properly attached. For information on attaching the security device, see page 24.

- If you want to link to a network security server, click the **Change Settings** option button. In the Security Device Settings scree:

  You can indicate the location of a network security server.
  OR
  Allow the program to search for one each time you run the program.

• If you do not have access to a local security device or a network security server, you can still run the program in demo mode. The demo version of the product has certain important features (such as save and print) disabled.

License Administrator

You can use the Trimble Accubid License Administrator program to check or set the number of licenses available on the network security server or your local security device.

To run the License Administrator program, click **Start / Programs / Trimble / License Administrator**.

Check Licenses

1. In the *License Administrator* window, click the **Computer** list and select the computer to be checked for licenses.

2. Click **Connect**. The total number of licenses for each product is listed, along with the number of licenses currently in use, the user and computer using those licenses, and the time stamp for that usage.

    ☼ **Tip –** If you experience any problem linking to a security server, our technical support representative may instruct you to click the Network Settings button and specify a different network protocol.

Update Licenses

Web License Update

To update your licenses through an internet connection, follow these steps:

1. In the *Trimble Accubid License Administrator* window, highlight the Product/License you wish to update. Click the **Web License Update** button. The *Transmission Warning* dialog opens.

2. Click **Yes** to continue with the update. The *Web License Update* dialog displays and the progress bar will indicate the status of the update.

File/Manual License Update

☼ **Tip –** You must be in contact with an MEP Client Services Representative before updating you license using one of these methods.

License Refresh Rate

By default, the list is updated every 30 seconds. To change how often the list of available licenses is updated, enter the desired rate (in seconds) in the **Refresh Rate** field.

Software Features/Navigation

The following information provided general features pertaining to the Classic software. Most features described in this section are available in all modules.

*Note –* *Screenshots used in this section may not agree with those in the current release of your software.*

Title Bar

The title bar displays the name of the program you are currently working or the name of the active window. If you change to a different job file, or switch between a schedule and a job window, the text in the title bar changes to reflect the new information.

Menu Bar

The menu bar displays the program's menus, each of which consists of a number of related menu options. Single click a menu name to view its pull-down menu, then click

an option to select it. For more information about program menus and menu options, refer to the online help system..
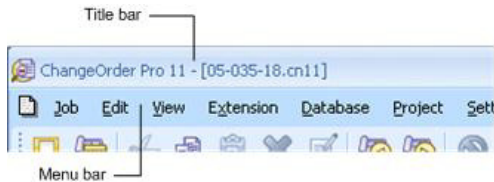
Pop-up Menus

Pop-up menus are menus that appear when you click with your right mouse button. Each pop-up menu displays options specific to the screen component at which your pointer is currently positioned. For example, if you click with your right mouse button over an entry in the audit trail in the Takeoff screen, the pop-up menu displays options that allow you to manipulate that takeoff. Pop-up menus provide a faster way of accessing the frequently used options that are also available within the pull-down menus on the menu bar.

Within the database tree on the left side of the Takeoff screen, however, the right mouse button returns you to the previous level after you have double clicked a takeoff line from the audit trail to view the items that comprise the takeoff.

Toolbars

Toolbars provide a quick way to access certain program functions without using pull-down or pop-up menus. If you position your mouse pointer over a toolbar icon and wait a second or two, the function represented by the icon displays in a tool tip. If a toolbar icon appears "grayed" out, that option is not currently appropriate or available.

For detailed information on the different toolbars used by Trimble Accubid estimating programs, see the online help.

Screen Tabs

Screen tabs allow you to move quickly between program screens. To move to another screen, click the appropriate tab. The graphic below illustrates the Estimation module. Simply click on a tab to move to another screen.
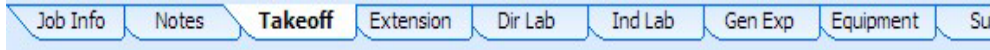
Status Bar

The status bar appears along the bottom of the program window and displays information messages, status messages, and other important information.

Scroll Bars

You can use horizontal and vertical scroll bars to move hidden portions of a screen or window into view. If the entire contents of a window are already displayed on the screen, the scroll bars may be absent or dimmed to indicate they are not required.

Splitter

Many of the screens are divided into various panes and these may include a splitter. In many cases, you can drag the splitter up or down, or to the left or right (depending on whether the screen is divided horizontally or vertically. This adjusts the size of the pane. To make the pane bigger or smaller, position your pointer over the splitter to change the pointer to a double-sided arrow, then drag in the direction based on what you want to do.

Screen Appearance

You can control the appearance of your program screens in a number of different ways.

Go to **Settings / Options** and click on the **Appearance** tab.
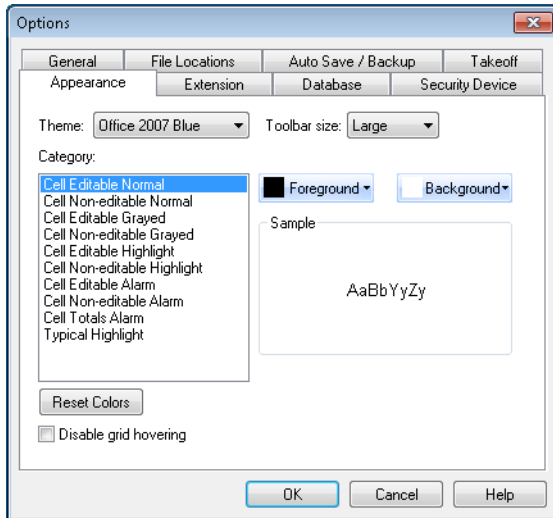
This tab allows you to:

- Choose themes used in the program (colors and so on)
- Control cell colors to distinguish different types of information.
- Size toolbars
- Set foreground/background colors

General controls relating to Windows Operating Systems (for example, sizing windows, columns) also apply.

Resize Screen Columns

From any program screen with a grid, you can resize the column widths to bring hidden information into view, or allow the program to determine the 'best fit'.

1. Position the pointer on the column heading you wish to resize.

2. Move the pointer directly over one of the grid boundaries until it becomes a double-sided arrow.

3. Hold the left mouse button down and drag the grid boundary to resize the column.
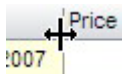
Alternatively, move your pointer over the grid boundary of the column you wish to resize so that the pointer becomes a double-sided arrow. Then, double click the left mouse button to have the program automatically resize the column.

☀ **Tip –** A string containing ##### occurs when a cell value that is wider than the column width. To view the actual value in the cell, increase the width of the column.
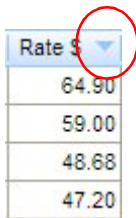
Sort Grids

On most screens with grids, you can control the display order. You can sort the rows using any of the available column headings.

☀ **Tip –** You can sort rows on any screen except the Job Info, Takeoff, and Totals screens.

To control the order in which jobs appear on the Job Schedule screen, select the Sort Schedule option from the Filter & Sort submenu under View.

• Click a cell in the column you want to sort by.

  – Click the **Sort Ascending** button 🔼 on the toolbar to sort rows in ascending order (numerically beginning with 1 then alphabetically beginning with A).

  – Click the **Sort Descending** button 🔽 to sort in descending order.

  An up or down triangle will appear in the heading of a column being used to sort rows in ascending or descending order.

Rate $ ▾
64.90
59.00
48.68
47.20

☼ **Tip –** The sorting will be ignored when printing or export screen information. While the sorting is in effect, the Insert, Cut, and Paste options will not be available from the pop-up menus for individual rows.

• To remove the sorting so that rows display in their default order, click the **Clear Sort** button ✖ on the toolbar. The sorting is automatically cleared when you switch to another program screen.

Screen Styles

Estimating/ ChangeOrder ONLY

Using screen styles, you can control the content and fonts of job screens, and the Job Schedule screen. You can control the available and width of columns, and the fonts to use to display the information. (Job screens include any screens except the Schedule screen) You can create multiple screen styles, each with a different combination of columns, column widths, and fonts, and easily switch back and forth between different screen styles.

☼ **Tip –** If you do not create a screen style, the program uses the default style, which includes all columns. Trimble Accubid Classic programs maintain separate sets of screen styles for the job screens, and the Job Schedule screen.

The screen styles you create while displaying a job screen become available on other job screens, but are not available on the Job Schedule screen. You can access and update a screen style from any job. If you change a screen style in one job, the change is applied to all jobs that use that style as well.

Though screen styles are primarily used to control the on-screen appearance of your estimating program, they can, in some cases, be used to determine the appearance and content of reports such as database reports and job summaries. To control the appearance of other printed reports, you use report styles.

When you save a job, any changes you have made to the current screen style are saved as well. Each time you run your estimating program, the program will automatically open the screen style in use the last time you displayed the Job Schedule screen. Each time you open a job, the job automatically loads the last screen style used with this job. When you create a new job, the current screen style serves as the default screen style for the new job.

> ☼ **Tip –** If a screen style is shared by multiple jobs, any changes made to the style sheet from one job does affect the style sheet of the other jobs that use it.

If you're on a network, you can share screen styles between multiple users. To do so, specify a shared location for the screen style files on the File Locations page of the Options dialog.

Estimating Program

Trimble Accubid Classic Estimating provides a number of screens to help you prepare, review, and manage your bids. All Classic Estimating program screens share a common look, feel, and behavior. This section describes the various screen components and also provides instructions that enable you to customize and optimally use the screens.

Screen Components

The major screen components found on most of Trimble Accubid estimating program's screens are described in detail in the sections that follow.

Program Control Box

The program control box appears in the upper left corner of the Trimble Accubid Classic estimating program screen and provides menu options that close or minimize the program. To display the program control menu, click the program control box once, then click an option to select it.

Job Control Box

The job control box appears in the upper left corner of the job window and provides menu options that can be used to close or minimize a job window. To display the job control menu, click the job control box once, then click an option to select it.
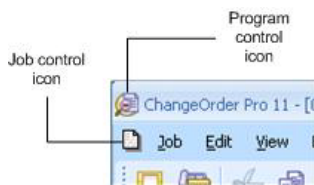
Set Defaults

You can set job defaults to determine the initial values that are automatically assigned to all new jobs, and specify the folders in which to store jobs. This section details

setting job defaults, job folders and database folders. This section provides some information about defaults. Refer to the online help system for more details.

Set Job Defaults

By setting job defaults, you can determine the initial values that are automatically assigned to all new jobs. You can set specific overheads, taxes, labor allocations, etc. You can override any default value during a takeoff for a particular job. The defaults are simply intended to save you time by providing initial values when you begin a new job. You can edit the existing default job or create the new default job from an existing job.

1. Click **Settings / Defaults / Edit Default** Job. The Takeoff screen for the default job appears. The job file name is Default.es[VER#].

☼ **Tip –** The default job shipped as part of your Trimble Accubid estimating program uses the following database, depending on the industry and country you selected at installation time.

Industry	US	Canada
Electrical	ELEC USA NECA IMP	ELEC CDN NECA IMP
Mechanical	MECH USA	MECH CDN
Structured Cabling	VDV USA	VDV CDN

If the appropriate database is not on your system when you go to edit the default job, you are prompted to select a different database.

2. Modify values appearing on any of the available program screens. The values entered on these screens appear as initial values for any new jobs you create, regardless of the database you choose for the job. The default values can include labor rates, takeoff breakdowns, expenses, etc.

☼ **Tip –** If you want to prevent the default job from being modified, you can use the Windows Explorer to set the file properties of the default job (Default.es11 in your C:\Program Files\Trimble\Jobdata or C:\ProgramData\Trimble\Databases folder, depending on your operating system) to read-only.

Refer to the online help system for more detailed instructions.

ChangeOrder Program

The ChangeOrder program provides a number of screens to help you prepare, review, and manage your change notices.

All ChangeOrder screens share a common look, feel, and behavior. This section describes the various screen components and also provides instructions that enable you to customize and optimally use the screens.

Screen Components

The major components found on most ChangeOrder program screens are described below.

Program Controls

The program control box appears in the upper left corner of the ChangeOrder program screen and provides menu options that close or minimize the program. To display the program control menu, click the program control box once, then click an option to select it.

Job Controls

The job control box appears in the upper left corner of the job window and provides menu options that can be used to close or minimize a job window. To display the job control menu, click the job control box once, then click an option to select it.
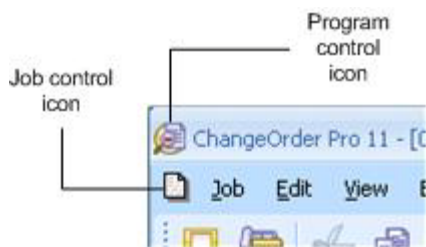
Time & Material Billing Program

Before you can create work orders, or schedule appointments and dispatch technicians, you need to set up your company, your clients, and your resources, and specify your email settings.

This section offers a very brief overview of the setup procedures. Refer to the online help system for detailed instructions.

Companies Setup

You can use Trimble Accubid's Time & Material Billing program to manage multiple service businesses by creating multiple companies. Company settings must be entered separately for each company.

Clients Setup

Client information is specific to each company. When you create a new job, you can only select from clients created within the current company.

Create Jobs

To create a work order, click on the **Job** menu and select the **New** option
OR
Click the **New Job** button on the toolbar.

Software Defaults

You can set defaults to determine the initial values that are automatically assigned to all new jobs, and specify the folders in which to store jobs. This section details setting job defaults, job folders and database folders. This section provides some information about defaults. Refer to the online help system for more details.

When you create a new project, the global default file (gdefault.cn[VER#]) is automatically copied and becomes the default file (default.cn[VER#] for that particular project. The default files contain certain time-saving, preset values that you can change to suit your needs. Once you set these values for a project, they become the

default for that particular project. When you create jobs, the values are drawn from the default file you set for that project.

When you edit the default file (default.cn[VER#]11), the changes only affect the current project. However, changes to the global default file (gdefault.cn11) affects all new projects created after the changes to the global default file are made.

Project Defaults

When you set project defaults, you determine the initial values to assign to a particular project. You can set specific overheads, taxes, labor allocations, etc., and override any default value during a takeoff for a particular project. You can edit the existing default file, or create a new one from an existing file.

Default Files

☼   **Tip –** You can edit this file without opening a job.

1.   Click the **Settings / Global Defaults**, then click **Edit Global Default**.

2.   Modify values on any available program screen. The values on these screens appear as initial values for any new jobs you create. The default values can include labor rates, takeoff breakdowns, expenses, and so on.

3.   Click **Job / Save** to save your changes.

Company Defaults

You can specify global company information that gets automatically assigned to each new project you create. The global company information eliminates entering common information about your company each time it is required.

1.   Click **Settings / Global Defaults / Global Company Info**. The Company Info dialog displays.

2.   Enter the required information in the appropriate fields on the My Company page.

   –   This information appears on printed reports.

   –   The Email page contains default information to send along with all change notices you e-mail.

– From the Subcontract ID page, you can revise the subcontract IDs that appear on the Base Contract page of this dialog, and are also available from the Subcontractors screen. By default, the first 5 subcontract IDs also appear as columns on the Schedule screen.

Project Folders

You can store projects in one or more folders, anywhere on your hard drive or network. Only those projects stored in folders designated as project folders are listed on the Project Path list on the dialogs that appear when you create a project or back up a project. Similarly, only projects stored in folders designated as project folders will be listed on the Schedule screen.

Initially, a project folder is specified as part of the program installation. However, at any time you can specify different or additional project folders.

1. Click **Settings / Project Folders** option.
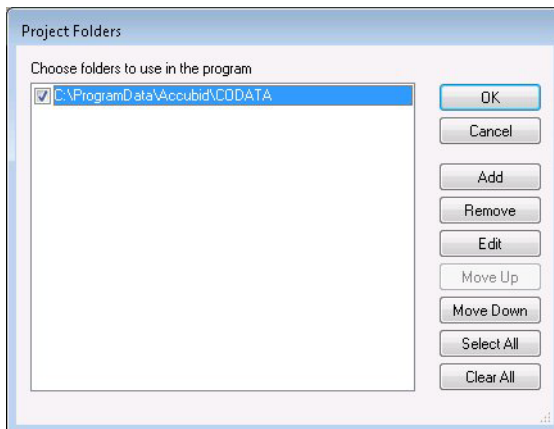
2. You can set project folders in the *Project Folders* dialog. The project folders listed on the Project Folders dialog are only considered project folders if the checkbox beside the folder name is selected ✔ .

3. Select the checkbox beside the appropriate folder name. To select all the folders listed, click **Select All**.

4. Click **OK** to close the dialog.

Database Folders

You can store material databases in one or more folders, anywhere on your hard drive or network. However, only those databases stored in folders designated as databases folders are listed on database selection dialogs, such as those that appear when you copy or restore a database. Initially, a database folder is specified as part of the program installation. You can specify different or additional databases folders at any time. You can also add or delete database folders.

You can set database folders from the Database Folders dialog.

1. Click **Settings / Database Folders**.
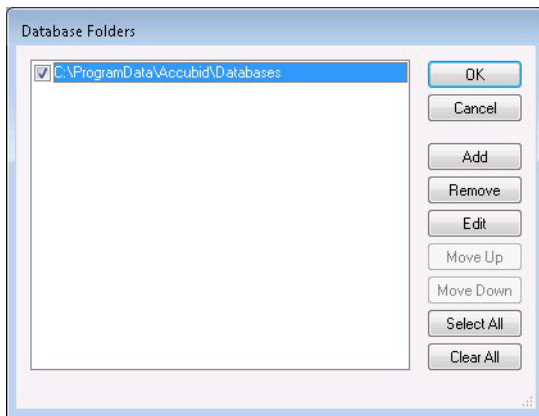
    The database folders listed here are only considered database folders if the check box beside the database is checked. At least one folder must be listed and checked in the Database Folders dialog.

2. Select the checkbox beside the appropriate folder. To select all the folders listed, click **Select All**.

Click **OK** to exit the dialog.

Assistance/Help

If you encounter a problem while using any of Trimble products, there are a couple of ways you can obtain assistance to successfully resolve the problem. In addition to the comprehensive online help system provided, you can contact a MEP Client Services Representative to obtain one-to-one assistance.

Accessing the Online Help

The online help is easy to use and is accessible through any of the following methods:

• Click the *What's This? Help* button from the toolbar, then click the menu option.

• Click the **Help** menu from any screen, then click on the Contents tab to further locate the information you need.

Trimble MEP Client Services

Before calling MEP Client Services, we suggest you consult the online help. Many of the common questions are covered in this system.

Trimble MEP Client Services is available Monday through Friday.

Note – *We are not available on major holidays.*

North America

Toll-free Telephone	1-800-361-3030

Outside North America

Telephone	1-905-761-8800

Internet e-mail
accubidsupport@trimble.com

Website
mep.trimble.com

To benefit most from our MEP Client Services department, please comply with the following guidelines before making contact:

• Please be at your computer when you call, as our representatives may have to guide you through the instructions step-by-step.

• You may also be asked to provide the following information:

• The product name and version (For example, Classic Estimating, and the version).

• The operating system you are using (For example, Windows® Vista®, or Windows® 7).

• A detailed outline of the problem, whether you can repeat the problem, and what you were doing when the problem occurred.

When you call MEP Client Services after regular support hours:

• Please leave a detailed message on our voice mail system.

• You can also fax or e-mail our client services representatives.

Our representatives will review you submission and contact you the next business day.

3 Getting Started

Trimble.