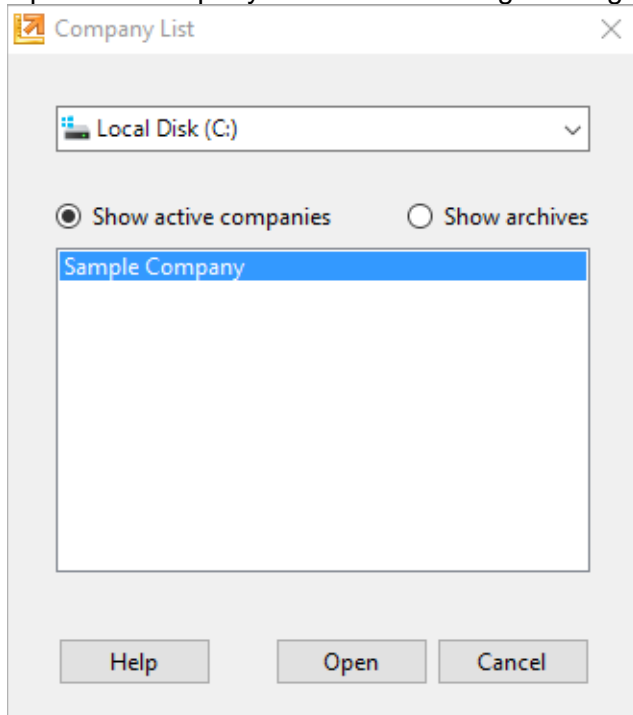


Sage 100c Integration Documentation

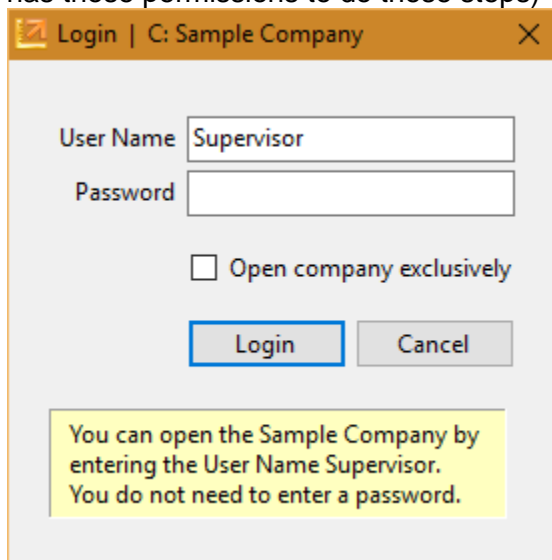
Sage 100 Contractor utilizes a license server to manage users. The license server can either be installed locally or on a host machine on the local network. The host machine installation allows users to access licenses from other computers. For more information about the Sage 100 Contractor setup visit [Sage Support](#).

Setting up API Group inside Sage 100 Contractor

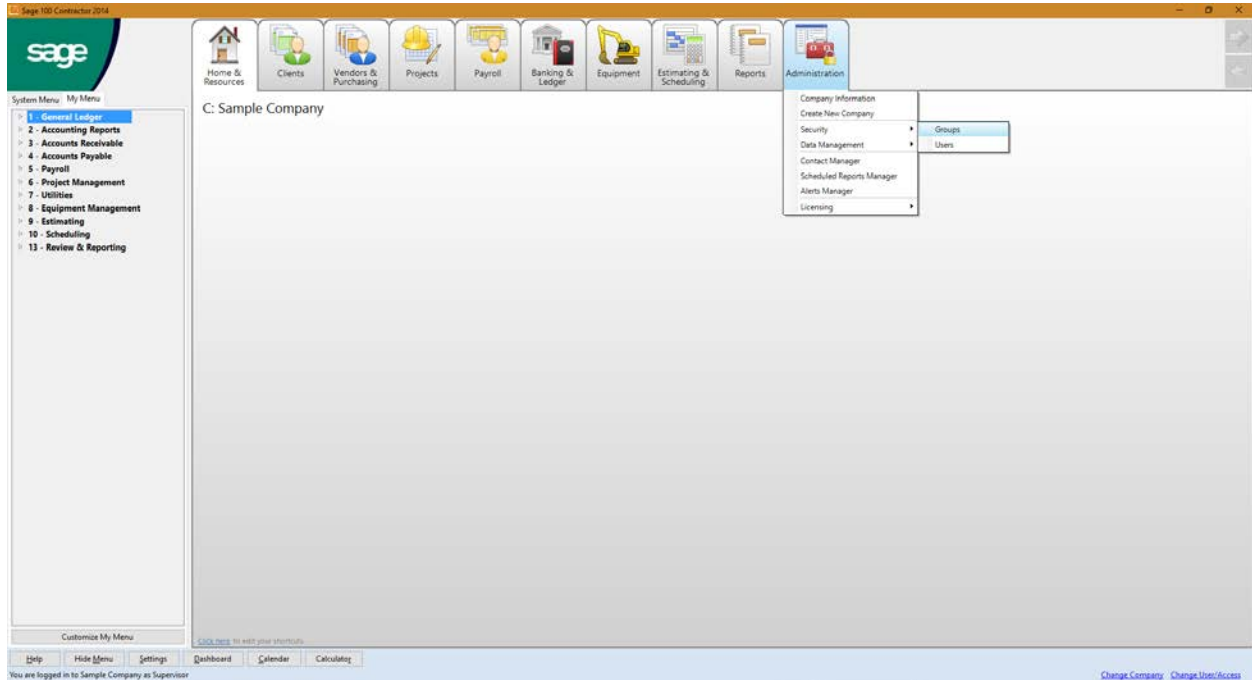
1. Open Sage 100 Contractor
2. Open the Company that will be utilizing the Sage 100c Integration



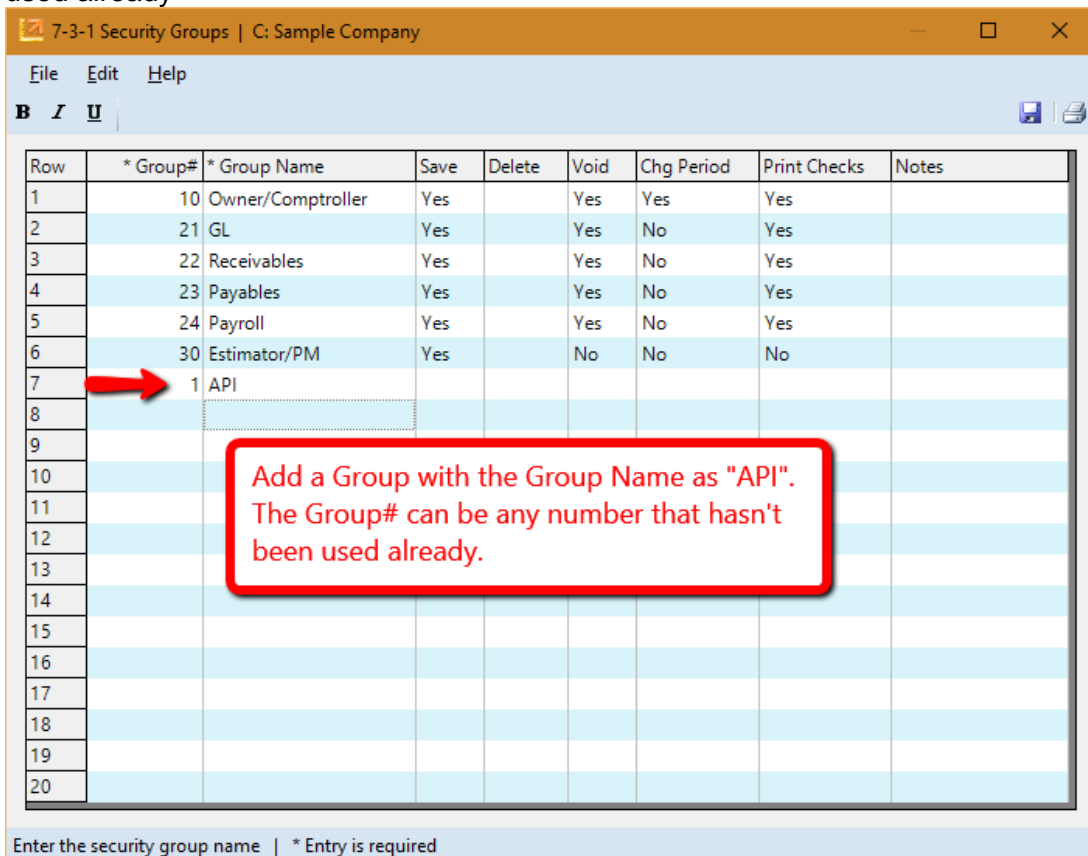
3. Login as Supervisor (If you do not have Supervisor permissions you will need whomever has those permissions to do these steps)



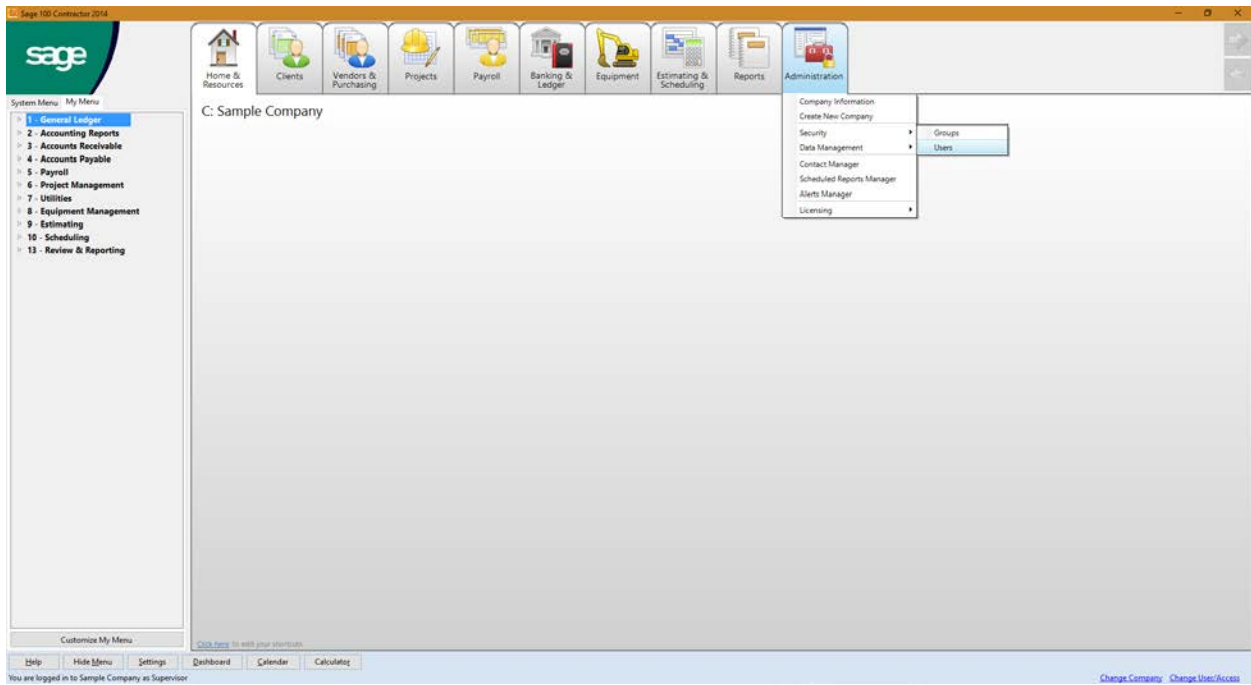
4. Hover over Administration Tab→ Security→ Click Groups



5. Add "API" Group...literally name it API...the Group# can be any number that hasn't been used already



6. Hover over Administration Tab→ Security→ Click User



7. Assign API group to Users with Sage 100c Integration Plugin
 - a. DO NOT use the Supervisor user

7-3-2 User List | C: Sample Company

File Edit Options Help

B I U

Display Passwords Copy User Defaults

Row	* User Name	Group 1	Group 2	Group 3	Group 4	Group 5	Subject To Job Security
1	Bryan	10 - Owner/Comptroller	1 - API				
2	Debra	10 - Owner/Comptroller					
3	Ginger	23 - Payables					Yes
4	Jenny	21 - GL	22 - Receivables	23 - Payables			Yes
5	Josh	30 - Estimator/PM					
6	Lynn	10 - Owner/Comptroller					
7	Scott	30 - Estimator/PM					
8	Supervisor						
9	Sample User	1 - API					
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							

Enter the security group number

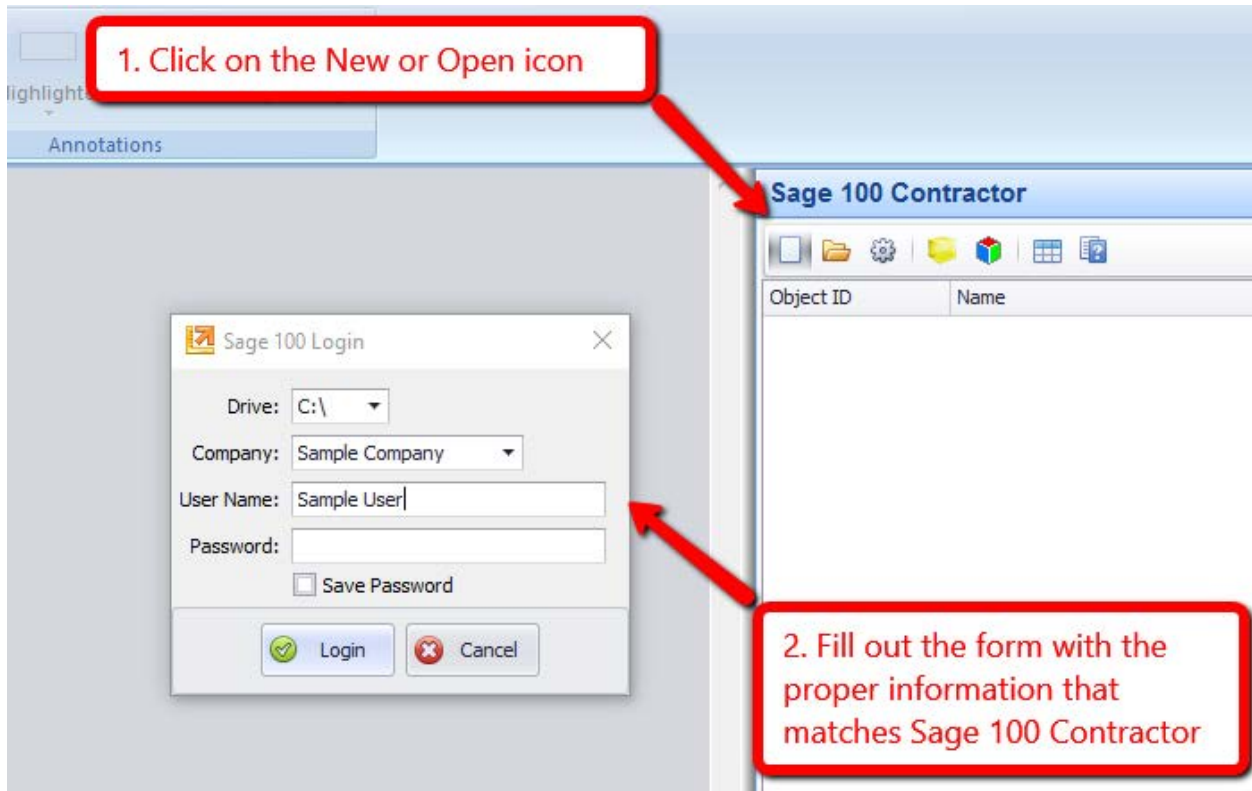
2. Or you can assign the API group to an existing user.

1. You can add a user to your user list and assign the API group to them by putting in the Group# associated to the API group. In this example we typed in "1" since the API group is Group# 1.

Installation and Setup of the Sage 100c Integration Plugin

1. Login to PlanSwift Plugin Store → Search for Sage → Select the Sage 100c Integration → Click the Download button

2. Run installer
 - a. If multiple versions of PlanSwift are on the computer select the version that will be utilizing the integration
3. If installed properly, you will see a new tab in the bottom left hand corner of the PlanSwift Home Tab called "Sage 100 Contractor"
 - a. You can right click the tab and choose to dock it on the right if you prefer
4. Click on the New or Open icons at the top of the Sage 100 Contractor tab to pull up the Sage 100 Login window

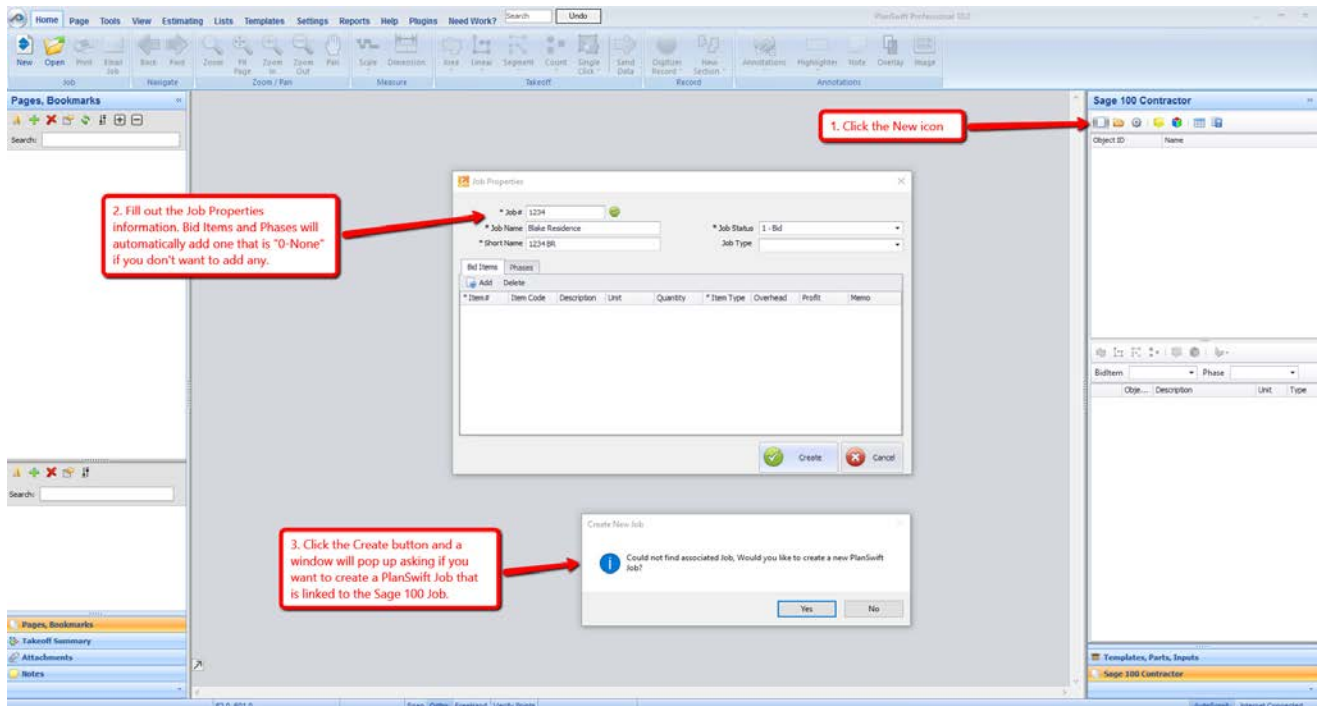


5. Fill out the the window with the appropriate Drive, Company, Username, and Password.
 - a. Please note that the user must be assigned to the API Group in Sage 100 Contractor for them to be able to log in
6. Once logged in, you will have access to create new jobs or open existing jobs from Sage 100 Contractor

Note: If you are using a beta version it must be uninstalled before installing the full version

Creating a New Job in PlanSwift using the Sage 100c Integration plugin

1. Click on the New Job icon located in the top left corner of the Sage 100 Contractor tab
2. Fill out the Job Properties window with the Job information
 - a. All of the following must be filled in:
 - i. Job#
 - ii. Job Name
 - iii. Short Name
 - iv. Job Status
 - b. Bid Items and Phases may be used. If none are added it will default to "0-None".
 - i. For more information about Bid items and Phases visit [Sage Support](#)



3. After clicking the Create button, a window will pop up that states, "Could not find associated Job, Would you like to create a new PlanSwift Job?"
 - a. Click the Yes button if you will be adding blueprints or if you are planning on digitizing in PlanSwift
 - b. Click No if you are just trying to create the project within Sage 100 Contractor
4. The New Job window will pop up with the Job/Quote # automatically populated with the Job # from Sage
 - a. It is recommended that you add a Description so as to easily find the project in the PlanSwift files later if you need to
 - b. Click the Next button

New Job

Enter the job # and description, then select the "New Job Location" for the job. This is where the job information and digital plan files will be stored.

Job/Quote #: Description:

Notes:

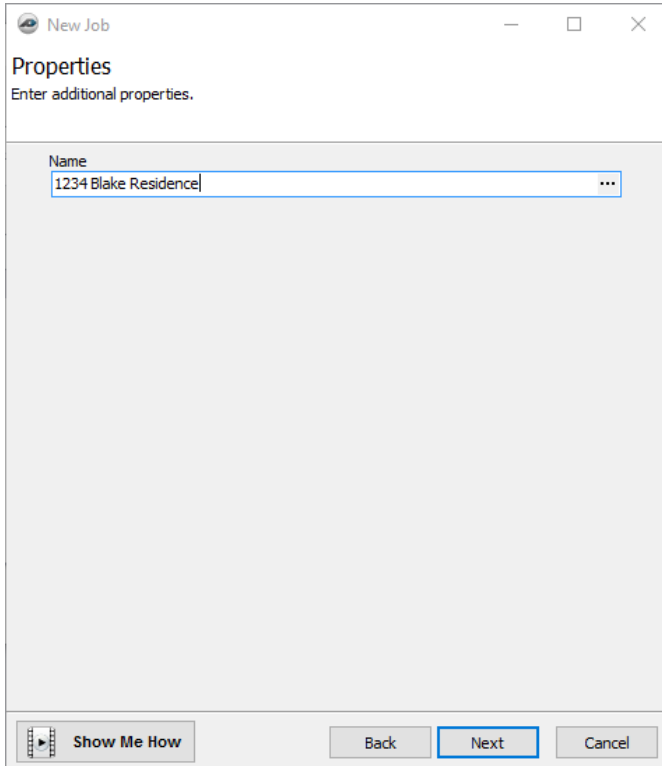
New Job Location: Measurement Type:

Note: You have selected LOCAL for the location of this job.
This set of plans will only be available from this computer
and not from the network.

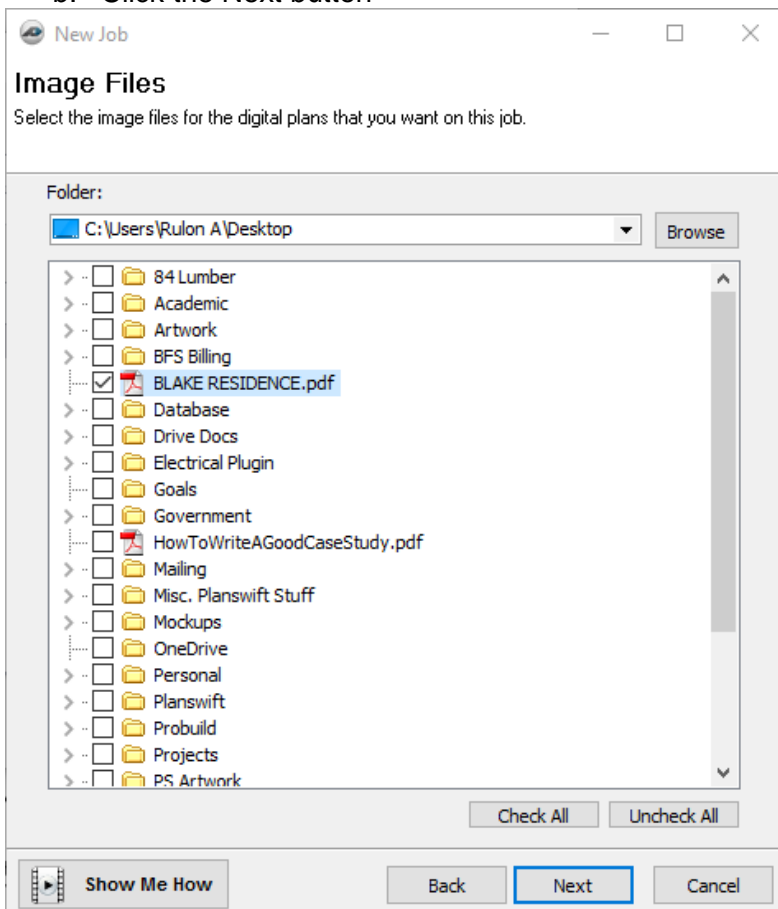
A new folder will be created which will store the job information and plan image files:
C:\Program Files (x86)\PlanSwift10\Data\Storages\Local\Jobs\1234

5. The Properties information can be edited if you want to, but it is not necessary

a. Click the Next button

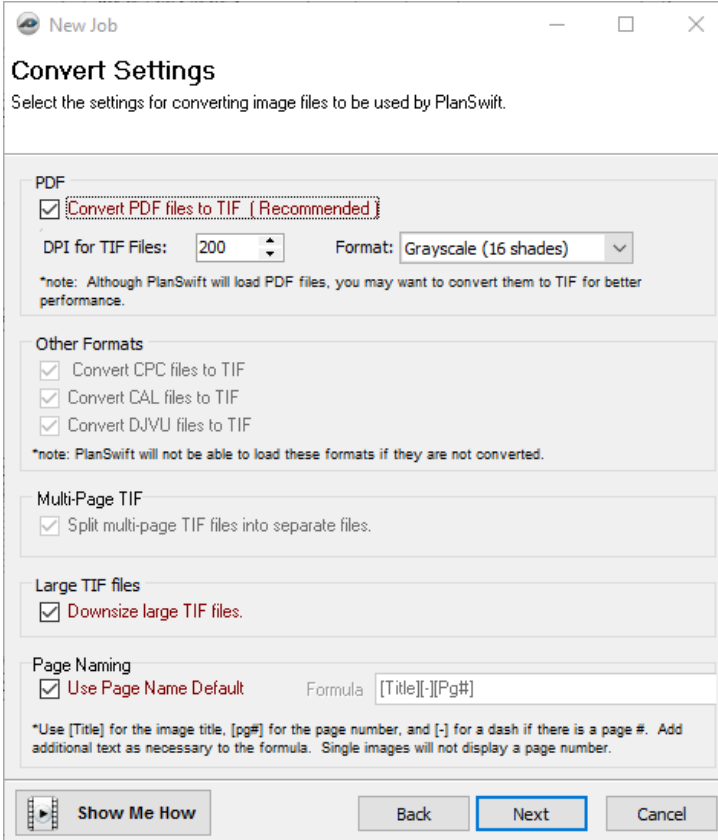


6. The Image Files window will allow you to browse to the location of the blueprints you want to load
 - a. Check the box next to the image files you want to load
 - b. Click the Next button

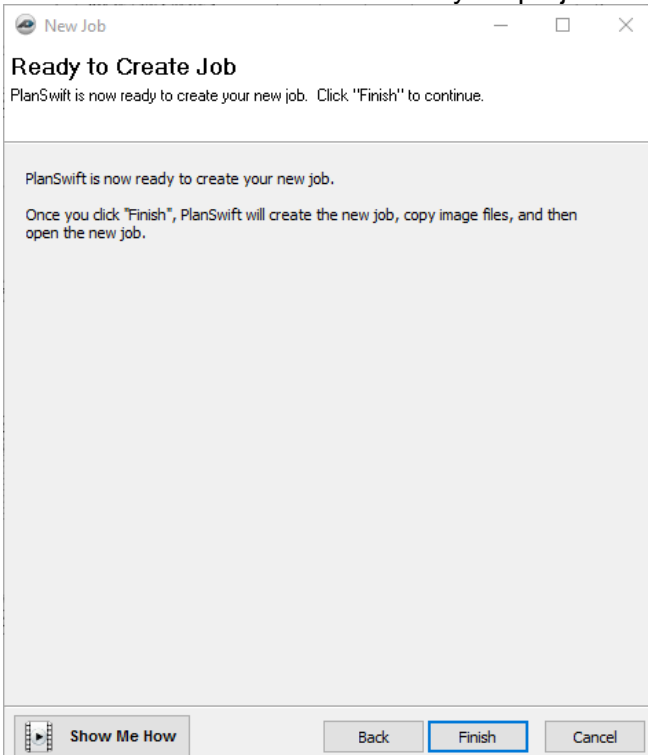


7. The Convert Settings window allows you to adjust the quality and file type of the blueprints

- a. It is recommended that you convert the file to a TIF file to improve the speed of the speed of the software
- b. You can lower the DPI if you are loading a large set of plans to improve the speed of the software. Note: This will lower the quality of the image files
- c. Click the Next button



8. The Ready to Create Job window will pop up
 - a. Click the Finish button and your project will begin to load in PlanSwift



The uninstall of the Sage 100c Integration can be done through the Programs and Features within Windows. Locate the the plugin with in the list (Sage 100c Integration) and click the uninstall button.

Setting Types

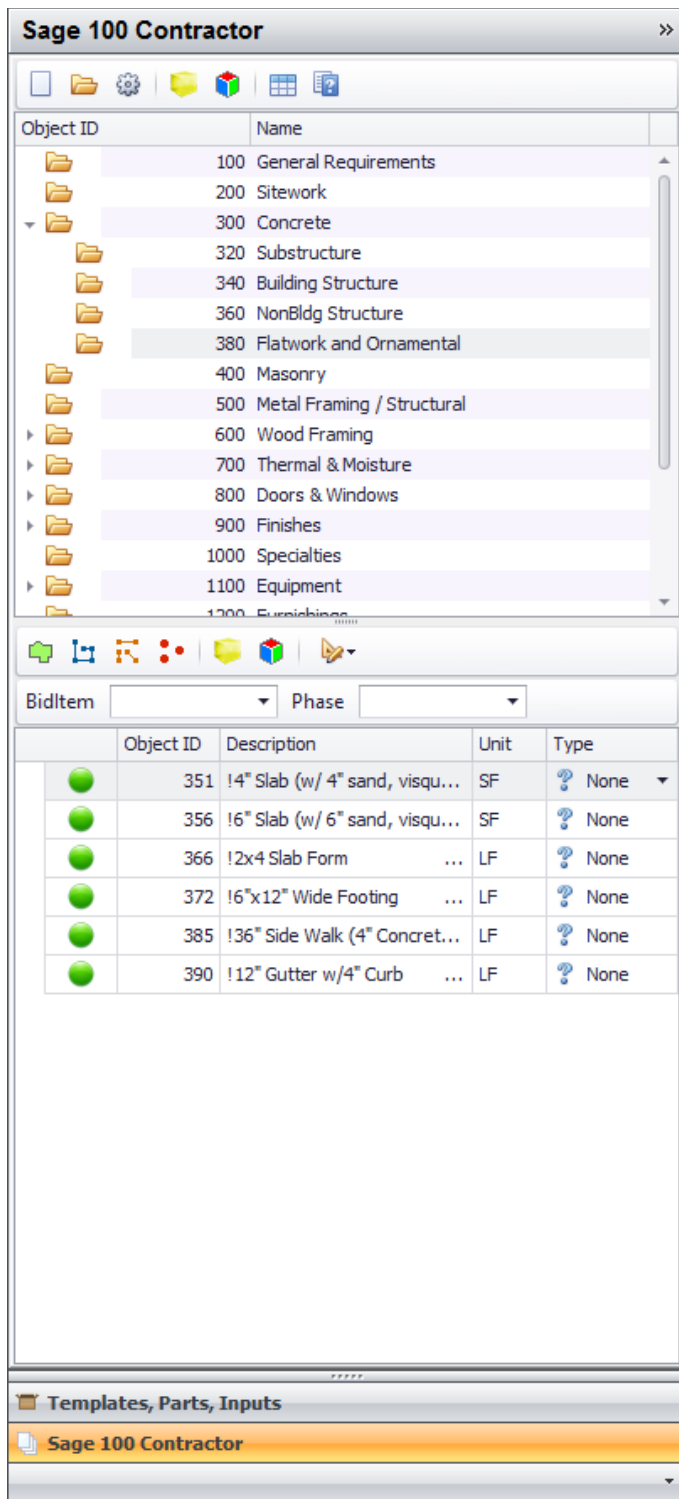
Every assembly within the Sage 100c Integration needs to have an associated type before you can use it to digitize. To set the type, locate the assembly with the Sage 100 Contractor window. The farthest right column of the assembly will display a “? None” if a type hasn’t been set yet. Click the “? None” and select one of the available type options to assign to it. Once it has be set you can click the green dot on the far left of the assembly to start digitizing with that assembly.

The screenshot shows the Sage 100 Contractor interface. On the left is a tree view of assemblies with Object IDs and Names. Below it are filters for BidItem and Phase. The main area contains a table of bid items with columns for Object ID, Description, Unit, and Type. A red arrow points to the 'None' type in the 'Type' column for Object ID 385. A red callout box with white text says: "You must assign a Type to a part or assembly before you can use it in PlanSwift".

Object ID	Description	Unit	Type
351	!4" Slab (w/ 4" sand, visqu...	SF	Area
356	!6" Slab (w/ 6" sand, visqu...	SF	Linear
366	!2x4 Slab Form ...	LF	Segment
372	!6"x12" Wide Footing ...	LF	Count
385	!36" Side Walk (4" Concret...	LF	? None
390	!12" Gutter w/4" Curb ...	LF	? None

Digitizing In PlanSwift using the Sage 100 Contractor Assemblies

1. After a Job has been created, you will have access to the Sage 100 Contractor parts and assemblies within the Sage 100c Integration tab in PlanSwift



2. A Type must be assigned to a Part or Assembly before you can use it to digitize in PlanSwift
 - a. To assign a type, click the box with "? None" and select the desired Type you will be using to digitize

Sage 100 Contractor

Object ID | Name

- 100 General Requirements
- 200 Sitework
- 300 Concrete
 - 320 Substructure
 - 340 Building Structure
 - 360 NonBldg Structure
 - 380 Flatwork and Ornamental
- 400 Masonry
- 500 Metal Framing / Structural
- 600 Wood Framing
- 700 Thermal & Moisture
- 800 Doors & Windows
- 900 Finishes
- 1000 Specialties
- 1100 Equipment
- 1200 Furnishings

BidItem | Phase

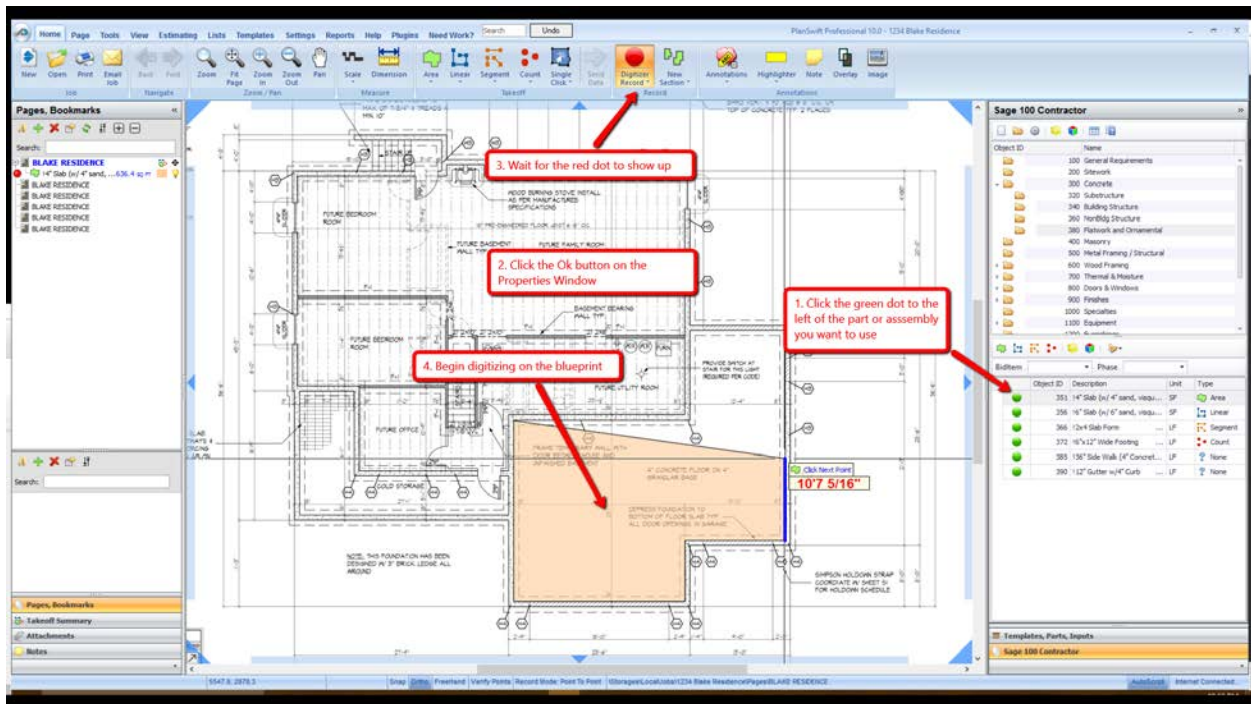
	Object ID	Description	Unit	Type
●	351	14" Slab (w/ 4" sand, visqu...	SF	Area
●	356	16" Slab (w/ 6" sand, visqu...	SF	Linear
●	366	12x4 Slab Form ...	LF	Segment
●	372	16"x12" Wide Footing ...	LF	Count
●	385	136" Side Walk (4" Concret...	LF	None
●	390	112" Gutter w/4" Curb ...	LF	None

You must assign a Type to a part or assembly before you can use it in PlanSwift

Templates, Parts, Inputs

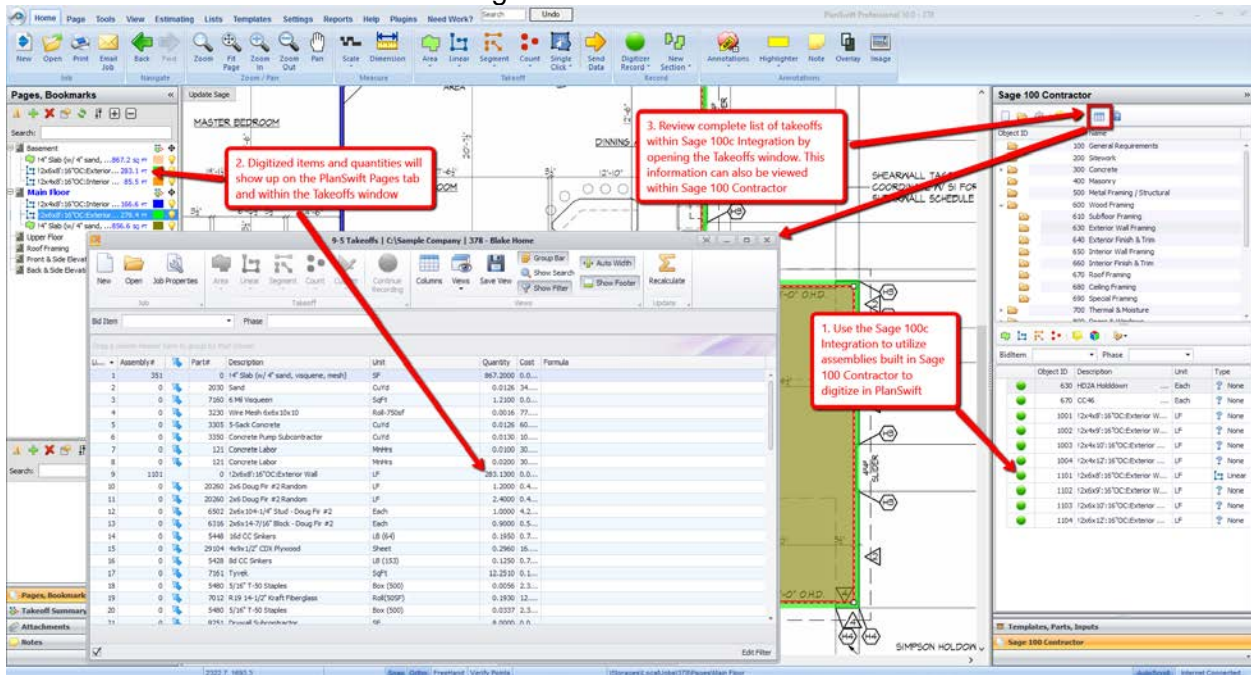
Sage 100 Contractor

3. Make sure the appropriate scale has been set on your page
4. Click the green to the left of the part or assembly to begin digitizing
 - a. A properties window will show up that will allow you to change some of the properties. Remember that PlanSwift is pulling the formulas from Sage 100 Contractor so only adjust properties that won't affect the item information or formulas like color, fill, etc.
 - b. Click the Ok button to start digitizing
5. Wait for the red dot to show up at the top
6. Begin digitizing on the blueprint



Viewing Takeoff Information

1. You can view your takeoff information in multiple ways.
 - a. Pages tab in PlanSwift
 - b. Takeoffs window in Sage 100c Integration
 - c. Takeoffs window in Sage 100 Contractor



Sage 100 Contractor 2014

sage

Home & Resources Clients Vendors & Purchasing Projects Payroll Banking & Ledger Equipment Estimating & Scheduling Reports Administration

System Menu My Menu

- 1 - General Ledger
- 2 - Accounting Reports
- 3 - Accounts Receivable
- 4 - Accounts Payable
- 5 - Payroll
- 6 - Project Management
- 7 - Utilities
- 8 - Equipment Management
- 9 - Estimating
- 10 - Scheduling
- 13 - Review & Reporting

Estimating and Scheduling

Takeoffs Budgets Tasks Schedules

Proposals

Part/Assembly Classes Parts Assemblies

Garb Chart Resource Report

Takeoff Worksheet Bid Summary Takeoff Bid Request Takeoff Bid Est. Price

1. Double-click Takeoffs

2. Select a project to view the takeoffs for that project

Takeoff Launch

Select an existing takeoff:

- 186 - Williams Post Office
- 201 - Pappas Motel
- 207 - Wood Elementary School
- 215 - Jimenez Barrio #1
- 216 - Jimenez Barrio #10
- 220 - Lamb Shoes
- 221 - Blake Path for Rte 66
- 222 - Big Redwood Tree Hotel
- 223 - Main Street Post Office
- 224 - Walking Shoes Shop
- 289 - Blake Residence

Create a new takeoff:

Job:

Open Takeoff Cancel

Customize My Menu

Help Hide Menu Settings Dashboard Calendar Calculator

You are logged in to Sample Company as Admin

Change Company Change User/Access

Sage 100 Contractor 2014

sage

Home & Resources Clients Vendors & Purchasing Projects Payroll Banking & Ledger Equipment Estimating & Scheduling Reports Administration

System Menu My Menu

- 1 - General Ledger
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Estimating and Scheduling

Takeoffs Budgets Tasks Schedules

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Garb Chart Resource Report

Takeoff Worksheet Bid Summary Takeoff Bid Request Takeoff Bid Est. Price

Items and quantities digitized in PlanSwift will show up in the takeoffs of Sage 100 Contractor automatically

8-3 Takeoffs | C:\Sample Company

File Edit Options Recap Update Export Import Grid Views Help

279 - Blake Home

Project Values Takeoff Details Recaps Insurance, Tax and Bonding Bid Summary

Row	Assembly#	Part#	Description	Unit	Quantity	Cost		
1	351		1/4" Stab (w/ 4" sand, viqueque mesh)	SF	867.2000	2,416.9		
2		2090	Sand	CuYd	0.0128	34.5000		
3		7140	6 MI Viqueque	SqFt	1.2100	0.0600		
4		3230	Wire Mesh-6x10x10	Roll-750sf	0.0016	77.2500		
5		3305	5-bag Concrete	CuYd	0.0126	60.0000		
6		3350	Concrete Pump Subcontractor	CuYd	0.0130	10.0000		
7		121	Concrete Labor	Mins	0.0100	30.0000		
8		121	Concrete Labor	Mins	0.0200	60.0000		
9	1101		2x4x8-16" OC Exterior Wall	LF	283.1300	27.408		
10		20360	2x6 Doug Fir #2 Random	LF	1.2000	0.4000		
11		20360	2x6 Doug Fir #2 Random	LF	2.4000	0.4000		
12		6502	2x6x10x4-1/8" Stud - Doug Fir #2	Each	1.0000	4.2100		
13		6310	2x6x12-7/8" Block - Doug Fir #2	Each	0.0000	0.5500		
14		5448	1/8" CC Sinks	LB (84)	0.1900	0.7300		
15		29104	4x8x1/2" CDX Plywood	Sheet	0.2960	16.0600		
16		5428	8d CC Sinks	LB (153)	0.1250	0.7300		
17		7161	Tyvek	SqFt	12.2510	0.1000		
18		5480	3/16" T-50 Staples	Box (500)	0.0566	2.3900		
19		7012	819 1/4-1/2" Kraft Fiberglass	Roll(500)	0.1800	12.0600		
20		5480	3/16" T-50 Staples	Box (500)	0.0337	2.3900		
21		6251	Drywall Subcontractor	SF	8.0000			
22		6010	Paint Subcontractor	SF	8.0000			
23								
				Cost Total	Overhead	Profit	Est Price	Gross Margin
				Current Grid	20,572.10	0.00	20,572.10	0.00 %
				All Grids	20,572.10	0.00	20,572.10	0.00 %

Go to Part Go to Assembly Bid Amount: 20,572.10

Assembly number

Customize My Menu

Help Hide Menu Settings Dashboard Calendar Calculator

You are logged in to Sample Company as Supervisor

Change Company Change User/Access