Liberate Estimating - Features list

	Function	Control
	NEW	
	Attach Documents before and after your BQ so that you can send your client a collated pack of drawings letters and documents	Print menu
	New filter control on Resources search and Item Category search	F9 or Search
	Automatic backup on Personal editions	OPTIONS Menu
	Sub-Totals Add subtotals in in your BQ at any point	Items toolbar
	The Groups feature; Group categories in your Items search for ease of quick estimating	Admin & Items Search
	Include logo on all pages	Reports
	Security	
✓	Login only approved user(s).	
✓	User can only access Jobs designated to each user's level i.e. set who can see which jobs as appropriate.	Admin Menu
✓	Administrator level can add new users and set who sees what	Admin Menu
✓	Set which users can administrate the libraries and add users etc.	Admin Menu

✓	**The Job Screen:** **Create and Control the Current Job**	
✓	Set custom layouts for the Job screen flyouts on the left hand side of your Items screen. Save them or redock them	
✓	Fine tune your job values with simultaneous views of your resources and margins	
✓	Create Manage Open File Jobs	Menu >Job
✓	Duplicate any Job and use the duplicate to submit variations on your tender	Menu >Job
✓	Change the default labour rate to fine tune tasks that use the default labour rate	Job
✓	Use other labour rates from a library of other labour rates	See items
✓	Get instant feedback on how many man days there are in your Job.	Job screen
✓	Adjust the "Hours per day" figure to cope with winter or summer, long distance or other difficult working conditions	Job screen
✓	Set the type of estimating: Normal or frequency-based estimating. Frequency based is turned off by default	Job Options button 2
✓	Backup one or many Jobs to enable portability of Jobs or just to backup for safekeeping	Menu>Job> Export

✓	Start new jobs with default mark-ups as set in in the options	
✓	VAT. Optionally add VAT to your Job	
✓	**The Items Screen -Your main Estimating Screen (Press I button or Ctrl+I from the Job screen**	
✓	Create new tasks from first principals using "normal language" You are not tied into Surveyor speak and can produce quotes and schedules in the jargon appropriate to your clientele.	F12
✓	Take off pads record your measurements and calculations. No limit to the number of take-off pads you can use in any task. Take off pads can be set against each material resource	Toolbar
✓	Take off pads as above against each plant as well as material resource	Toolbar
✓	Get instant feedback on time and cost via the Outputs feature in all resource types	
✓	Move, delete or save multiple selected items simultaneously	Multi-select
✓	Comment on your BQ items as reminders or to-do's in your estimate	
✓	Calculators at Items level and in the Library levels that add the calculated value to the quantities field and that record your calculations for future reference.	

✓	Add resources to a task from the Library	F9 from the resource form
✓	Add resources to a task even if the resources do not exist in your library	Free text
✓	Save a built-up task to your items library to retrieve again in the future. You'll never have to build up the task again - no matter what the size or quantity	F10 and select a category
✓	Find and Replace resource; Replace a resource with another throughout your Job	Edit > Replace resource
✓	Spell check at Items level	Tool bar
✓	**Items Library**	
✓	Select one item at a time from the item's library.	F9 from the resource form; Use the filters
✓	Select multiple items from multiple categories, review a schedule of what you have selected, and bring these all into your B/Q at the same time.	F9 from the Items form
✓	Insert Library item at any point on the build-up page.	F9 from the Items form
✓	Combine multiple Library items. Select two or more items and combine them into one item. On each item you will be asked for the individual quantity of that item required to make up the quantity of the new item. You would then be able to store the new item back to the library	Use the filters after selecting F9

✓	Import of library item into existing item. This would allow an assistant to type in/scan in/import a list of bill items. The relevant library item would then be retrieved into the current item.	F9 from the Item
✓	Select items from the library by Category, Code, Original Job or Keyword	
✓	Create new categories from your build up page to save directly into the Items library	F10 from the Item
✓	Separate program for library administration. The library can be updated in a multi-user environment whist the estimator works on the pricing	Menu>Admin
✓	Retrieved items will automatically update with the current library labour rates and resource prices	
✓	There are multiple separate library sets; Users can set which library they wish to address. E.g. Landscape Building works or Civil Works. You can custom name the libraries as you wish	Admin >Library sections
✓	**Resource Libraries**	
✓	You have 4 Resource Libraries; Materials Labour Plant Sub Contractor. Each library activated depending on which resource screen you are on	
✓	Quick search from hotkey. Type the first few letters of a required resource and the LiberRATE search engine will bring up a list of resources that match.	First few letters +F9
✓	Change prices in libraries will not automatically update your Job - Update only the Jobs you want to update	Admin >Resource library >M/L/P/S

✓	Enter Pack size in Library for calculation of full packs required by your Job. LiberRATE will advise you on allowances to make to full pack size. (Material and Plant)	Admin >Resource library >M/L/P/S
✓	Enter Waste factor in your resource library	Admin >Resource library >M/L/P/S
✓	Enter Supplier discounts in your resource library	Admin >Resource library >M/L/P/S
✓	Import electronic supplier lists Next year's import will not overwrite discounts so you can update each year electronically	Admin >Resource library >M/L/P/S> Import list
✓	Search by supplier, category, description or code or a combination to find the resource you require	
✓	Update selected resources by a %	
✓	Export to an Excel file for updating and re-importing	Admin >Resource library >M/L/P/S> Export list
✓	Automatic date against each resource entered in the resource library. This will enable you to see the date when you last updated this resource. The date update will only change if there are changes to the price of the resource	
✓	**Item Screen Functions**	
✓	Build up the extent of your task – not a single unit. See screenshot for explanation	
✓	Add as many different resources into each resource type as you wish to fully describe each aspect of the task. The estimate then becomes the site task schedule when the Job is won	F9 or free text from the resource section

✓	Set header items	Toolbar> heading
✓	Exclude items in your Bill from the final totals (lets you provide alternatives that don't add into the final total	Toolbar >exclude
✓	Apply individual mark-ups to resources to exclude them from the global mark-ups	Resource form MLPS Mark-up
✓	Set any item or resources as a provisional sum to be summarized separately	Resource form MLPS Mark-up
✓	Undo up to 12 levels of deletions	Toolbar
✓	Bookmark multiple items	Items form Bookmark icon
✓	Find or Find and replace a resource with another resource in one location or throughout your job	Edit Find or Replace resource whilst on a resource screen
✓	Estimate using the frequency option (This must be switched on from the Job screen). This is a switchable option mostly designed for maintenance estimating where tasks are repetitive over a period such as facilities management ground care or railway maintenance. You get totals and reports on a per occasion or per annum basis or a combination of both.	Job> Job Options button 2

✓	**Multi-user functionality**	
✓	Your Jobs and Library database will have multi-user capability. If you are on a network your entire team or organization will be able to use the same library and Jobs databases	
✓	**Bill of Quantities Import**	
✓	Import Electronic Bills of quantity into the system for pricing in your client's format	Job> Menu Import BoQ
✓	**Master Jobs**	
✓	A master job will control several sub Jobs. This will mean that if a Job is divided into different sections say Earthworks, Paving's, Walls, Water features. Each section will have its own Sub totals and reports. There will also be reports for the Global Job.	Create new Job> Master Job
✓	**Job Folders**	
✓	Jobs stored in a folder system. Folders can be named by yourself e.g. Big Jobs Small Jobs Old Jobs etc. You will be able to have as many folders as you like for storing or organizing your jobs	
✓		

✓	**Overhead and Profit**	
✓	Add percentages to 2 decimal places for each resource type globally or at individual task level	
✓	Add an overhead % to your Job separately from the profits	
✓	**Database Check and Repair**	
✓	Accessed from the Admin menu to optimise the database. Should be run frequently to safeguard data	Admin
✓	**Reports**	Menu > Reports
✓	A fully functional set of reports for both issue to client and project management	
✓	Reports may be issued with options of "At cost", "With profit" or even have prices left out	Report options dialogue
✓	Reports for master jobs and sub jobs using the current set of reports	
✓	Reports of required revenues/resources for selected jobs or jobs between selected dates	

✓	Project management reports on expenditure to date and required expenditure. Using master job functions	
✓	Add logos and standard text your BQ report	Reports; BoQ report only
✓	**Administrative version**	
✓	A free administrative version is now available for all multiuser systems. This has reduced functionality	