

# 13.1 RELEASE NOTES

## **Trimble® Accubid Classic Software**

- Introduction
- New Features/Modifications
- Update Installation Instructions
- Product Assistance

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## Release Notice

The topics within this document 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

## Edition

This is the Trimble® Accubid Classic software Release Notes (Revision A\_ENG); Release 13.1.

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## Introduction

This document provides basic information about new features, enhancements, and modifications in **release 13.1 of the Trimble® Accubid Classic software**. More detailed information can be found in the online help system.

### What You Receive with this Release

- New/Modified features outlined in this document
- Updated online help
- Electronic documentation available on the installation media and the Trimble Client Portal

### Upgrade Procedure

Please refer to the [Update Installation Instructions](#) at the end of this document for information on requirements to install this update. Trimble recommends that you print these instructions to help ensure proper operation of the software application after installation.

**Note** – *In the installation routine, selecting the Update database option installs only program modifications and enhancements. Your existing tables, specifications, and estimates are not impacted in any way.*

## Compatibility

### Operating Systems

This version of the Classic software is compatible with 32-bit and 64-bit Windows® 7, Windows 8, and Windows® 10 operating systems. For a more complete listing of Technical Specifications, please go to our website at [mep.trimble.com](http://mep.trimble.com) to review the technical specifications for the Trimble Accubid Classic software (*Products / Trimble Accubid Classic Estimating / Technical Specifications*).

### Trimble® Accubid LiveCount™

This release of the Classic software is compatible with the Trimble Accubid LiveCount software, release 5.0.


### Trimble® Work Management

The Trimble® Work Management software is Integrated into the Trimble® Time & Material Billing application. The Work Management program provides intelligent scheduling tools for those companies with a mobile workforce.

### Intuit QuickBooks®

The Time & Material Billing software includes an integration with the Intuit QuickBooks application. This integration is compatible with QuickBooks versions 2012 and newer.

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 **Tip** – While the integration may work with earlier versions of the QuickBooks application, Trimble recommends you upgrade to the most recent release to take full advantage of all features in the software applications.

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## New Features/Modifications

This document lists new features and modifications in the Trimble Accubid Classic products.

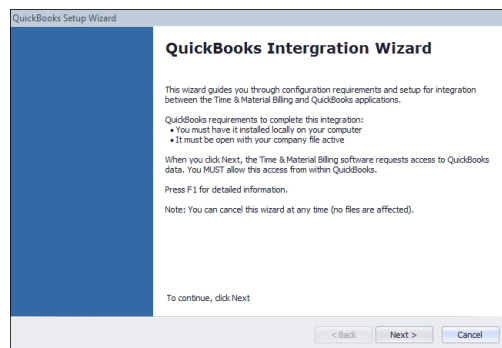
### Time & Material Billing

#### Intuit QuickBooks Integration

The Time & Material Billing software now offers an integration with the Intuit QuickBooks application. This allows you to enter and track project information in the Time & Material product, but use the QuickBooks application for all of your accounting needs.

**Note** – Please refer to the [Compatibility](#) section in this document for information on supported versions of QuickBooks.

The QuickBooks software integration is activated under *Company / Company Info*. When you select the **Enable QuickBooks Integration** checkbox , the QuickBooks Integration wizard opens.



The wizard contains a series of screens that allow you to map the Time & Material Billing and QuickBooks fields and parameters. The settings created in the wizard screens allow proper communication between the two applications.

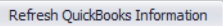
**Note** – *The wizard screens guide you through various required settings. Keep in mind that you can cancel out of the wizard at any time and no changes are recorded. When you click **Finish** in the final wizard screen, all selected settings become active. QuickBooks will now be the primary accounting/billing vehicle for your company.*



**Tip** – Trimble recommends that you select a date to begin using the integration and invoicing. You cannot go back once the integration is complete.

#### Considerations/Additional Information

- The wizard process is required only one time. The communication between the applications remains static until *you* disable it.

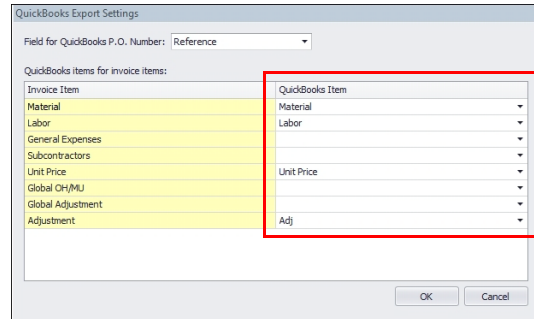
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- The QuickBooks application requires an interface application prior to allowing communication with the Time & Material Billing software. If the application is not installed, you have the opportunity to install it during the wizard process. (This is an Intuit requirement/application.) This is a *one time* installation.
  - The integration supports only *one* QuickBooks company to *one* Time & Material Billing company (per database).
  - The QuickBooks software must be:
    - Available to the person responsible for transferring data between the two applications
    - Installed on a local machine
    - Open and running with the company file active
  - Items from the Time & Material Billing software Totals page are combined in the QuickBooks software based on the mappings set in the wizard; for example, all line items for material (material, overhead, and markup) are combined into one QuickBooks item. The same process applies to labor and other line items from the Time & Material Billing Totals screen.
  - Keep in mind that once you have linked the Time & Material Billing software with the Intuit application, all taxes and terms are handled through QuickBooks. Any changes you wish to make *must* be completed in the QuickBooks application.
  - Taxes and terms changed in the QuickBooks software (after the integration/export is complete) require an update to the Time & Material Billing database. This is done in the Company Info dialog by clicking  to bring the new/modified data into the Time & Material Billing database. **Note:** *This also provides the appropriate tax/terms and so on for employees who do not require the QuickBooks software, but use the Time & Material application for invoicing.*
  - You can remove the QuickBooks integration at any time by clearing the **Enable QuickBooks Integration** checkbox  under *Company / Company Info*. Keep in mind that this removes all integration information and returns you to your original Time & Material Billing settings.

### Export to QuickBooks

The Export to QuickBooks option is available under the *Job / Export / Accounting* command. This allows you to export invoices/credit memos from the Time & Material Billing software to the QuickBooks application. The QuickBooks software must be open and running with your company file active to successfully export from the Time & Material Billing application.

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**Note** – The QuickBooks software requires that all items are properly assigned prior to export. If you did not properly assign all required items during the wizard process, the Export dialog allows you to complete the assignments by clicking the **Setup** button in the Export dialog.



## Additional Modifications

The following additional modifications are included in this release of the Classic software.

### Classic Software Suite

- In the Extension screen, alarms now display properly for Final Price and Quoted Material.
- When a measurement item is selected in the LiveCount software, the associated line item in the Classic Estimating Audit Trail is now properly selected.
- You can now copy items containing more than 11 characters in Code or Type fields (Classic Estimating/Classic ChangeOrder applications).
- When merging a sub to a master job, Labor Factor breakdowns are now ordered/indexed properly .
- Display issues (layout and formatting) have been resolved for the following:
  - Surface devices
  - High resolution monitors

### Time & Material Billing Software

- Job Info Screen modifications
  - The *Job Description* field is now available. This description is sent to the QuickBooks software, making it easier to locate a specific invoice.
  - The *email address* field now allows you to include more than one email address (using a semi-colon as a separator). This allows you to send emails to additional recipients who require job information.
- From time-to-time, the Time & Material Billing Client Name was blank in some records. This issue has been resolved.

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- Data exported from an earlier release of the Time & Material Billing software (Version 9 and before) is now formatted properly when imported into a more recent version of the application.



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## Essential Release Information

- **Microsoft SQL 2012**

This installation routine in this release of the Trimble Time & Material Billing software installs Microsoft SQL 2012. You will be unable to attach the database *packaged* with this version of the software to a lower version of SQL. Migrating the database from an earlier version of SQL will continue to work; for example, if you have SQL 2008 and migrate to the current Time & Material Billing software.
- **Compatible “Update From” Versions**

The Trimble Accubid Classic software can be updated directly from the any release of the following:

  - Version 11
  - Version 12
  - Version 13

If the currently installed version is not in the list above, please contact MEP Client Services at 1-800-361-3030 for assistance prior to installing.
- Pressing **[Esc]** on your keyboard in the Cost Allocation dialog no longer closes the window. You must now click *OK* or *Cancel*.
- **LiveCount™ Procedures**

When you are working in the LiveCount software, you must send your work to the Classic Estimating application *before* resuming work on your estimate. Failure to do so results in loss of the work completed in the LiveCount software.
- **Scalex Support**

The Classic Estimating software no longer supports the Scalex measuring tool. This is due to Scalex compatibility issues with the Windows 64-bit operating system.
- **Product Support**


If you have any questions regarding the Essential Release Information presented, please see the [Product Assistance](#) section for MEP Client Services contact information.

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## Update Installation Instructions

- The instructions below assume you have already downloaded the installation files from the Trimble Client Portal.
- You must have a previous version of the Classic software on the computer where you are installing this update.
- All users must be logged out of the Classic Estimating software before installing this update.
- ***Trimble recommends that you install this update during a non-busy time or after hours to minimize disruptions in your company's workflow.***

### Estimating/ChangeOrder Installation Procedures

1. Locate the downloaded installation file. Double-click on it. The installation routine prepares the files.
  2. In the Trimble welcome screen, click **Trimble® Accubid Classic Estimating & ChangeOrder**.
  3. In the *Welcome to the InstallShield Wizard for Trimble Accubid Classic v13* screen, click **Next**.
  4. Review the information in the License Screen. Click **I Accept the terms of the license agreement**.
    - You must accept the terms of the license agreement to continue the installation.
    - If you wish to obtain a hard copy of the agreement, click **Print**.Click **Next**.
  5. In the *Custom Setup* screen, select all options you want to install. Click the **Help** button for more information on selecting options. Click **Next**.
  6. Select the proper option buttons in the *Install Material Database/Default Jobs* screen.
    - **Country**
    - **Measurement** **Tip** – If you do not want to *Install a new material database*, clear the checkbox .
- Click
- Next**
- .


7. In the second *Install Material Database/Default Jobs* screen, review the conversion options available. All checkboxes are selected. **Trimble recommends that you convert all jobs to the latest version**. If you do not want to convert, clear the appropriate checkboxes .

Click **Next**.

8. In the *Ready to Install the Program* screen, click **Install**.

9. Click **Finish** when complete.

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10. Depending on your conversion selections (in [Step 7](#) above), the appropriate dialogs open.


 **Tip** – You will be presented with a dialog for each option you chose to convert.

### Estimating Conversion Dialog

- a. Select the appropriate folders containing jobs from previous versions. If the Select Folders pane does not contain any information, click **Add** and you can enter the folder path or browse to the folder.
- b. In the Convert from which version field, select the job version you are upgrading from. Click **OK**.
- c. In the Convert Old Job Files dialog:
  - >Select the checkboxes next to each job you want to convert. If you do not want to convert specific jobs, clear the checkbox.
  - >Click **Convert**. When the conversion is complete, click **OK** in the confirmation message.

### ChangeOrder Conversion Dialog

- a. Select the appropriate folders containing jobs from previous versions. If the Select Folders pane does not contain any information, click **Add** and you can enter the folder path or browse to the folder.
- b. In the Convert from which version field, select the job version you are upgrading from. Click **OK**.
- c. In the ChangeOrder File Converter dialog:
  - >Select the checkboxes next to the jobs/files you want to convert. If you do not want to convert specific jobs/files, clear the appropriate checkbox.
  - >Click **Convert**. When the conversion is complete, click **OK** in the confirmation message.


 **Tip** – Do not close the Trimble Accubid Classic welcome screen if you have other compatible software that requires installation. Refer to the [Additional Software Installation](#) section for more information.

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## Additional Software Installation


Depending on the software you currently have installed and/or are licensed to use, you may need to install additional software/databases to complete the update process.

### Time & Material Billing Installation

1. In the Trimble welcome screen, click **Trimble® Time & Material Billing**.
2. In the *Welcome to the InstallShield Wizard for Trimble® Time & Material Billing Install* screen, click **Next**.
3. Review the information in the License Screen. Click **I Accept the terms of the license agreement**.
  - You must accept the terms of the license agreement to continue the installation.
  - If you wish to obtain a hard copy of the agreement, click **Print**.Click **Next**.
4. In the *Custom Setup* screen, select all options you want to install. Click the **Help** button for more information on selecting options. Click **Next**.
5. Select the proper option buttons in the *Install Material Database/Default Jobs* screen.
  - **Country**
  - **Measurement** **Tip** – If you do not want to *Install a new material database*, clear the checkbox . Keep in mind that regardless of your selection in this step, you must install the Time & Material SQL database. Refer to [Time & Material Billing Database](#) below for detailed instructions.  
Click **Next**.
6. In the *Ready to Install the Program* screen, click **Install**.
7. Click **Finish** when complete.

### Time & Material Billing Database

If you are currently using or are licensed for the Time & Material Billing software, you must install the updated database.

 **Tip** – The instructions provided in this section assume you are using SQL Authentication for the Time & Material Billing database.

1. In the Trimble Accubid Classic welcome screen, click **Trimble® Time & Material Billing SQL Database**.
2. In the SQL Install dialog, the **Use existing SQL Server instance** is selected by default for update customers. Click ▼ to select the SQL Instance you want to use.

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3. Enter the **Login** and **Password** for the SQL instance already installed. If you do not have this information available, contact your IT professional for assistance.
  4. In the **Authentication Type for database** field, *SQL Authentication* is already selected.
  5. Click **Install**. A confirmation message displays when complete.

### LiveCount 5.0 Software

1. In the Trimble Accubid Classic welcome screen, click **Trimble® LiveCount™**.
2. Follow the on-screen prompts to install the update.
3. When complete, click **Finish**.

### Trimble® Integrator

To take full advantage of the features available in the Trimble Integrator, Trimble recommends you install the update included in this release.

1. In the Trimble Accubid Classic welcome screen, click **Trimble® Integrator**. The *Welcome to the InstallShield Wizard for Trimble Integrator* screen displays. Review the information on-screen and then click **Next**.
2. Review the information in the License Agreement screen. Click **I Accept the terms of the license agreement**.
  - You must accept the terms of the license agreement to continue the installation.
  - If you wish to obtain a hard copy of the agreement, click **Print**.Click **Next**.
3. In the *Destination Folder* screen, click **Next**. **Trimble recommends you install the Integrator software in the default location.**
4. In the *Ready to Install the Program* screen, click **Install**.
5. When complete, click **Finish**.

### Complete Installation Procedures

In the Trimble Accubid Classic welcome screen, click **Exit**.

Provided you followed all instructions in this document, you are now ready to use this release of the software applications.

### Final Steps

- Open the software using the method you normally do.
- The online help system contains step-by-step instructions on using many of the features included in this release.




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## Product Assistance

Trimble offers several avenues to obtain help using the Classic software program.

### Accessing the Online Help

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

- Press the **F1** key at any time while using the program to display help for the current screen or dialog.
- Click the **Help** menu and then click **Help**. You can scan the Table of Contents, use the Index, or the Search function to find the information you are looking for.
-  **Tip** – You can also click  or  on the toolbar to open the online help system.
- Use the **Index** tab to locate key words throughout the help system.
- Use the **Search** tab to find specific words used in the help system; for example, you might search for the word delete for instructions on deleting certain data from your system.

### Trimble MEP Client Services

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

Trimble MEP Client Services is available during regular business hours 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](mailto:accubidsupport@trimble.com)

**Website** [mep.trimble.com](http://mep.trimble.com)

### Third-Party Software Support

Trimble software may be integrated with third-party software applications (for example, accounting programs). Trimble MEP Client Services cannot provide in-depth support for third-party applications. Assistance is available **only** for procedures pertaining to how our software interfaces with non-Trimble applications.