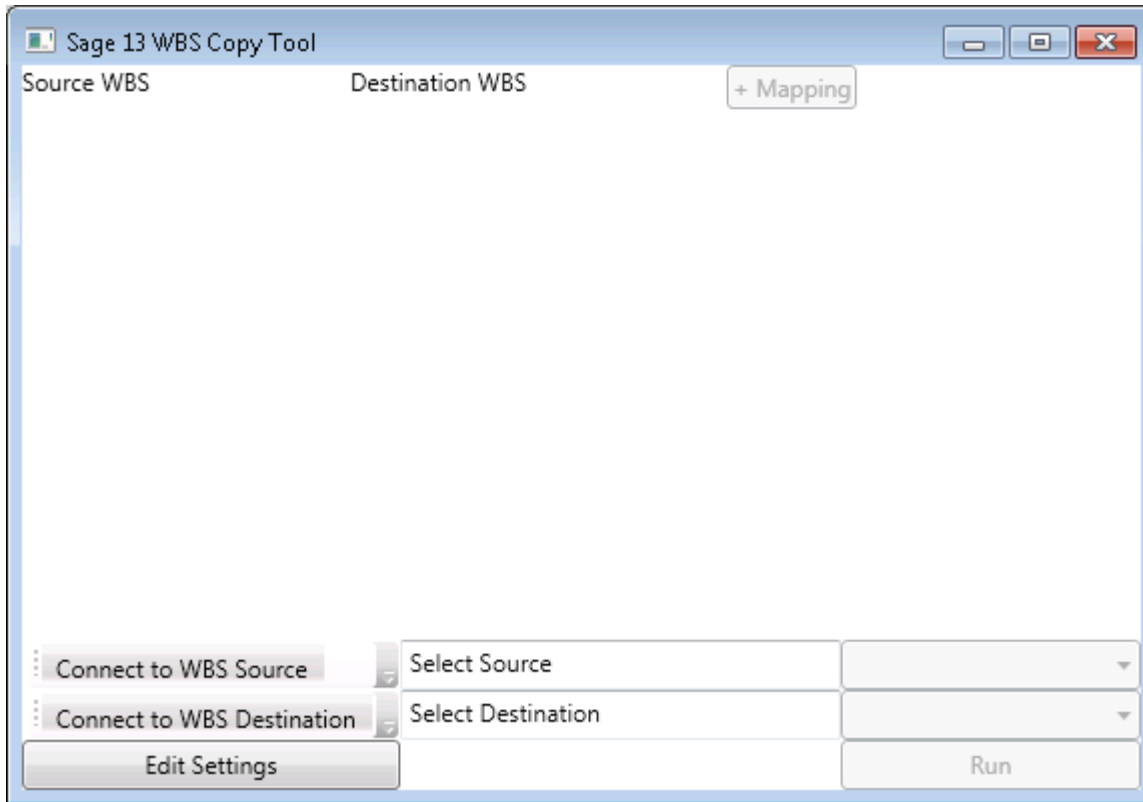
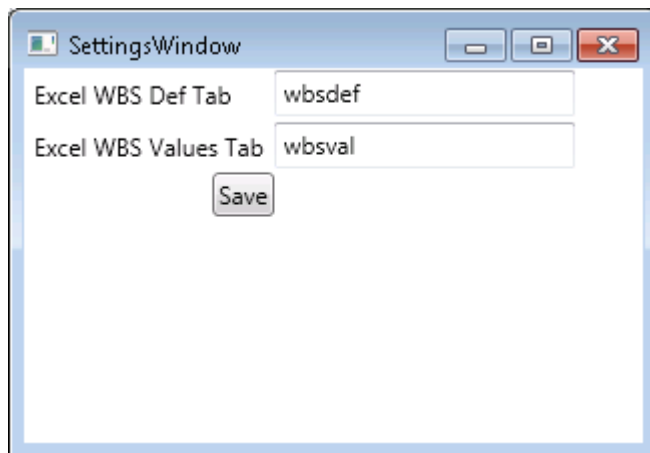


Using Sage 13 WBS Tool

1. Start the Application. When loaded you will see the main window.



2. **First time users: You will want to walk through the settings and make sure it works with your Excel file import.** Pay attention to the tab names. Make these match your template Excel file. If you need to change the names, do it here.



WBS Definitions Column Spec:

- A. **WbsIndex** (integer): A number 1-40.
- B. **Description** (Text-10): Column Name.
- C. **Size** (integer): Size of entry field. 1-20
- D. **WbsType** (Text-1): D = detail type, (no other types supported currently)
- E. **UnitName** (Text-4): Estimate unit of measure. Not supported currently.

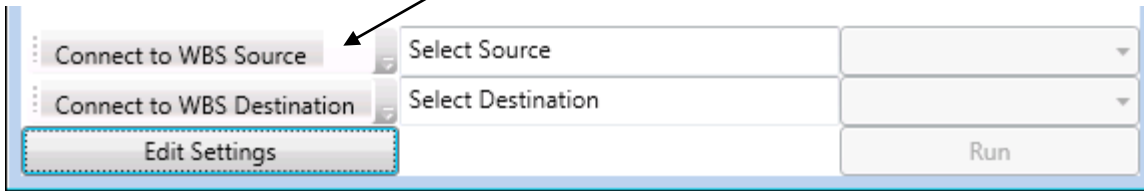
	A	B	C	D	E	F
1	WbsIndex	Description	Size	WbsType	UnitName	
2	1	Area1	20	D		
3	2	Area2	20	D		
4	3	Level	20	D		
5						
6						
7						
8						
9						

WBS Value Column Spec:

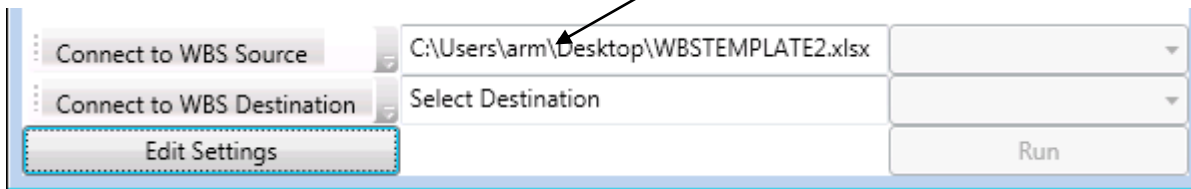
- A. **Sequence** (integer): A number 1-40.
- B. **Value** (Text-20): Use a number here if you want sorting..
- C. **Description** (Text-20): Extended description of value field.
- D. **UnitName** (Text-4): Estimate unit of measure. Not supported currently.
- E. **Notes** (Text-255): Note for entry.

	A	B	C	D	E	F
1	Sequence	Value	Description	UnitName	Note	
2	1	1 - Driveway		ea		
3	1	2 - Main House		ea		
4	1	3 - Cabana		ea		
5	1	4 - Swimming Pool		ea		
6	1	5 - Elevated Deck		ea		
7	1	6 - Perimeter		ea		
8	1	7 - Landscaping		ea		
9	1	8 - Driveway		ea		
10	2	1 - Site				
11	2	2 - House				
12	2	3 - Other Buildings				
13	3	0 - Basement				
14	3	1 - Main Floor				
15	3	2 - Second Floor				
16						

- Once your template is complete. Save and close Excel.
- Now select your source for the import. Click "Connect to WBS Source". Under that menu choose "Excel File".



- Open File Dialog:** Open the Excel template file you created previously. Other methods are not supported yet.
- The file will appear in the text box next to the menu.

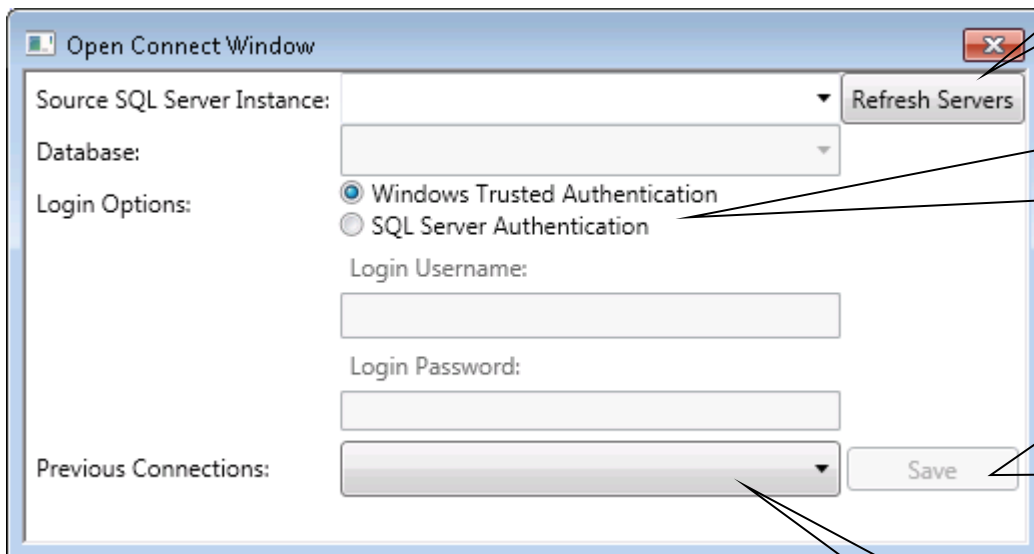


- Next is to connect to a destination Sage Estimate. Click "Connect to WBS Destination" menu. Choose "Sage Estimate". Only one supported currently.
- Open Connect Window: Connect to your SQL Server data source. See below for information.

Click "Refresh Servers" to search for SQL servers on network. Pick the server \instance from the list. Once selected pick a Database from the list below.

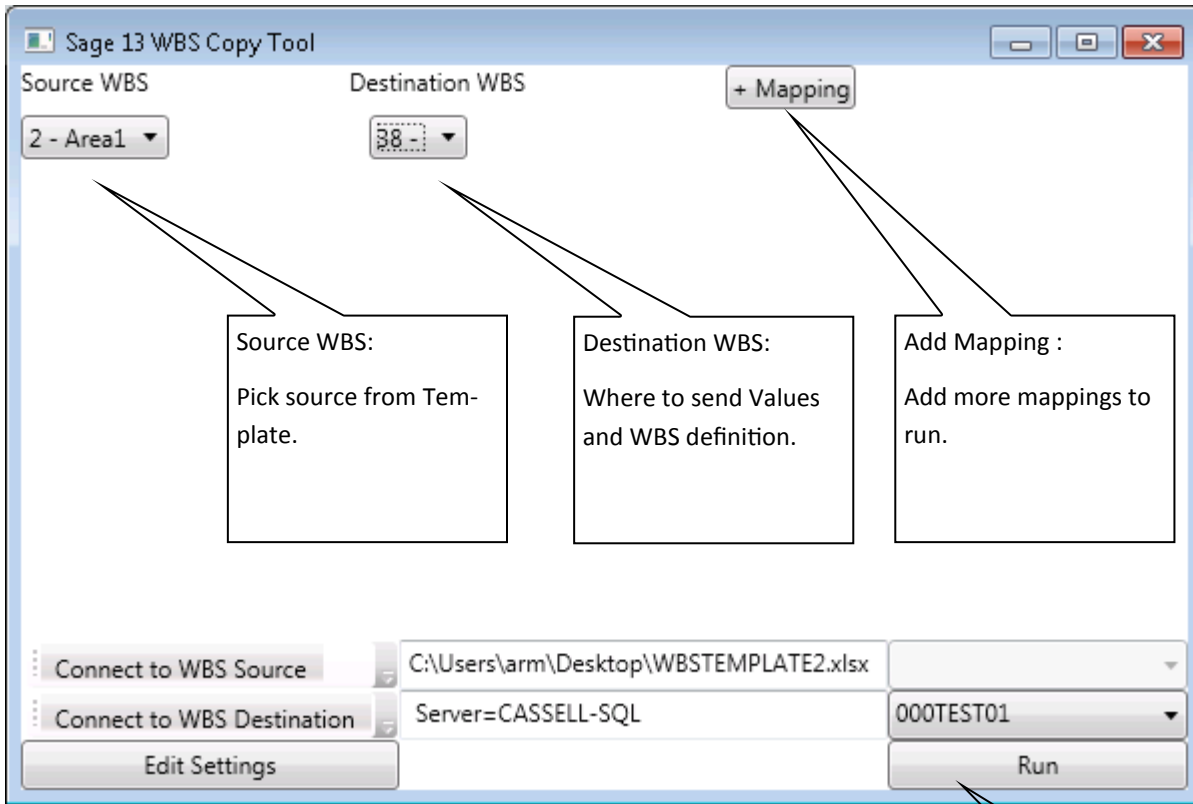
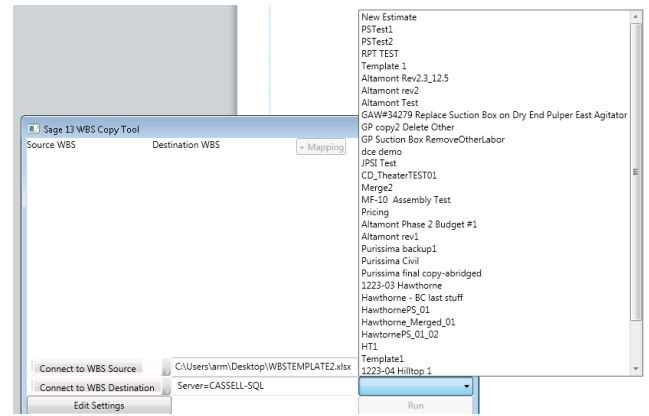
Log In Method: Windows Trusted or Provide a username / password to access the database.

Save Button: Save settings once info is ready.



Previous Connections: Will remember working connections. Use this after saving connection for first time.

9. Once back to the Main Window the connection info will show next to the WBS Source menu You should see the Estimate pick list activate. Select the target Estimate from the pick list.
10. The mapping button at the top of the Window will now activate once the Source and Destination are specified. Click "+ Mapping".
11. Two drop down boxes will appear side by side. Pick the source column from the first box and the destination WBS column from the second one.
12. Repeat last two steps for each mapping you want to push.
13. Click the run button to begin procedure.



Run Button:
Push data to target estimate.