# JIM'S ESTIMATORXPRESS® TOP TIP

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Creating your own Area based workbooks

If you find yourself wanting to estimate something that is not covered by standard workbooks why not create your own? One way to do this is to modify one of the blank template workbooks and save it for future use. In this case we are going to use the 'Area' template as our starting point and add materials and labour to the workbook.

The best place to start is within the first estimate you intend to use your customised workbook. If your estimate doesn't already include the Area workbook click on **Add Workbook** on your estimate summary page and choose to add the Area workbook.
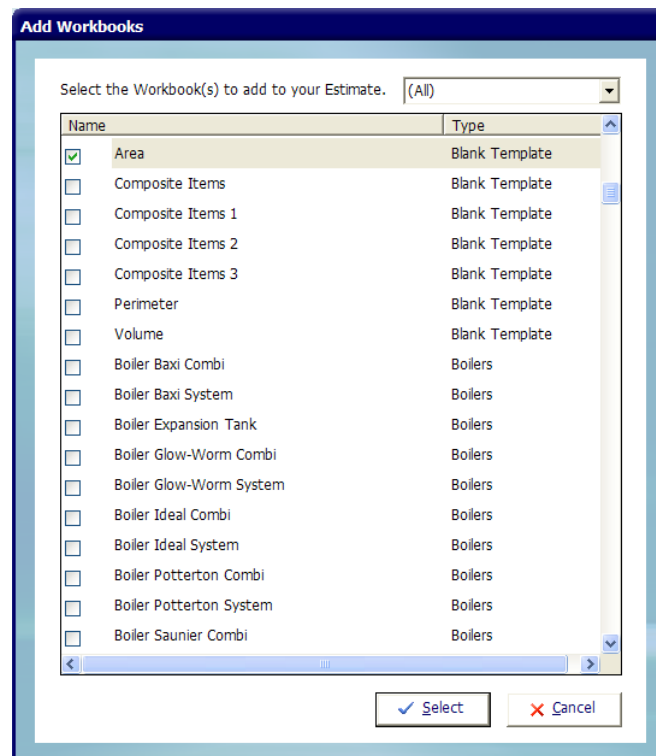

Next we need to open the Area workbook and give the worksheet a name and location.
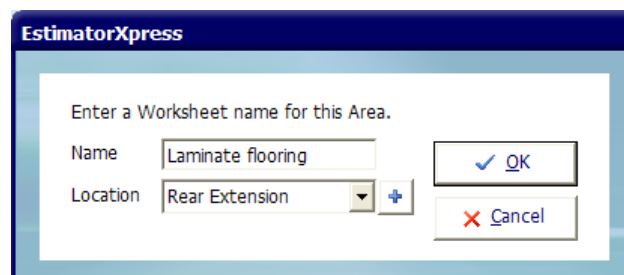
You could use the Area workbook to create your own Laminate flooring workbook for use in your current and future estimates. Next we need to select which dimensional template we want to use.
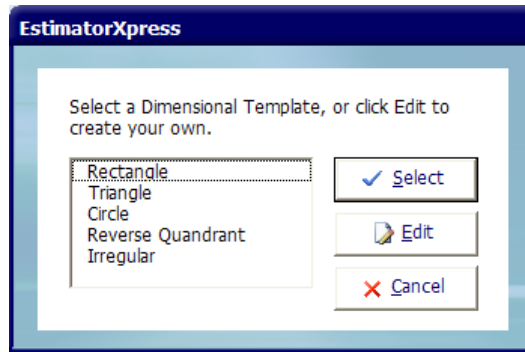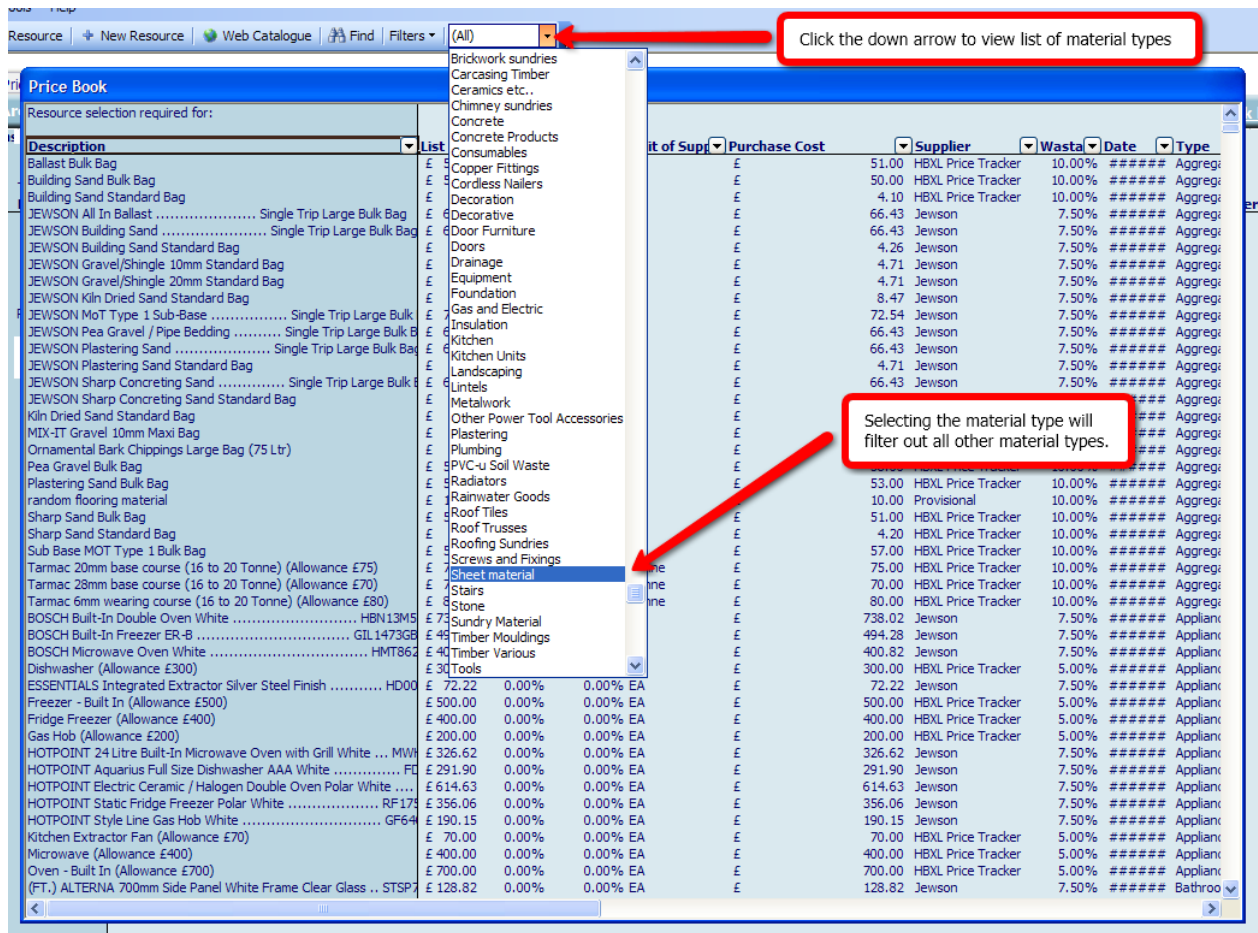
For this example we are going to use the Rectangle template. This will give us a worksheet with a simple area calculator already in place. This simple template allows you to change the dimensions of 'Length' and 'Breadth' each time you use the workbook in a different estimate. To start adding materials and labour to our worksheet we need to click on the **View Resources Output** button.
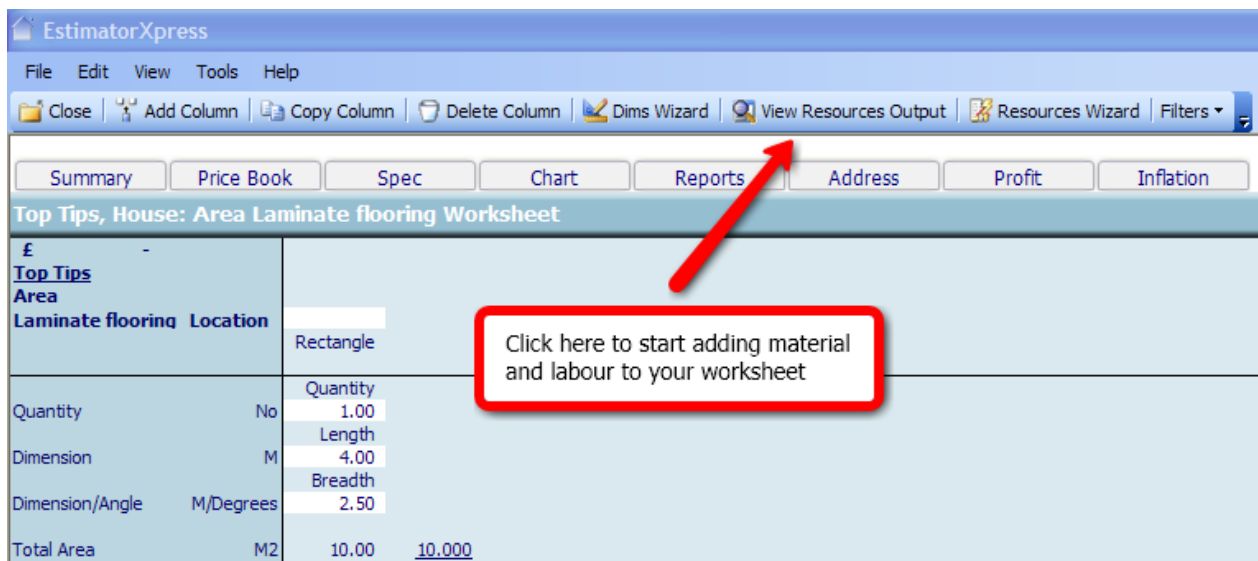
After clicking on the **View Resources Output** button you will see the screen below. As you can see we don't have any resources in our workbook yet, so lets add them in.
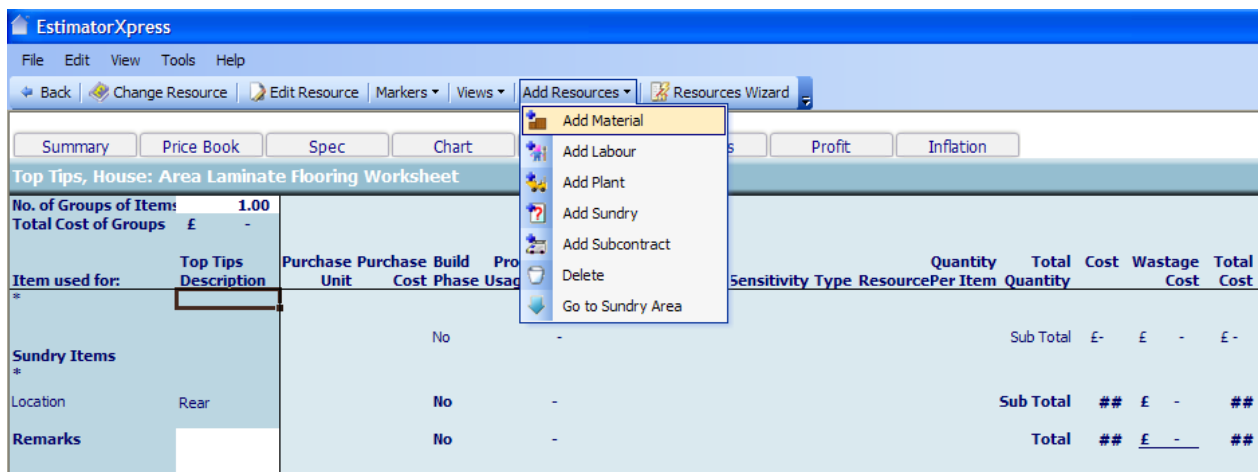
To start with we will add a material resource to our worksheet; we can then keep repeating the process to add further resources of any type. Clicking **Add Material** from the **Add Resources** drop down menu will bring up the Materials section of the price book.

By clicking on the filter drop down arrow at the top of the screen we can select what type of material we want to look for. For this example we are going to use some laminate flooring already added from the Jewson web catalogue, you could do the same or even create your own material resource.

(For more information please refer to your getting started guide under the headings 'SELECTING NEW MATERIALS FROM THE HBXL WEBSITE' and 'CREATING A NEW PRODUCT IN YOUR PRICEBOOK'

Once you have found the material you want to add to the worksheet you need to single click on the material and then click the **Select Resource** button.
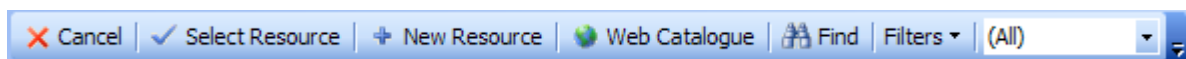
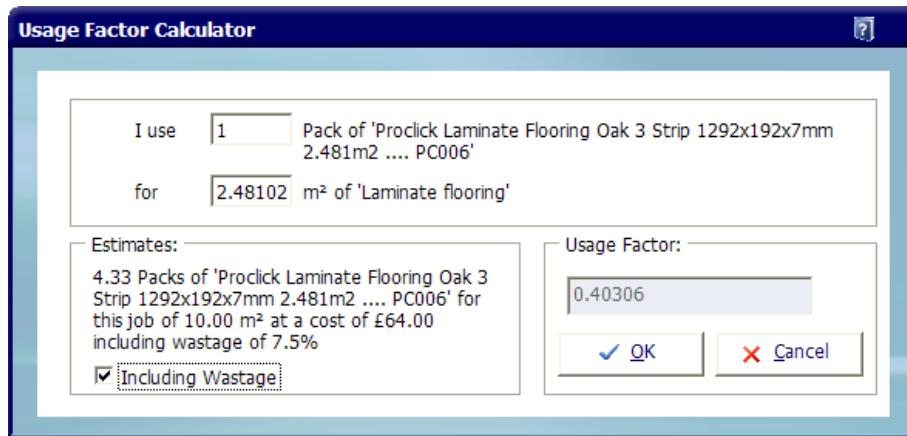After selecting the resource the Edit resource window will pop up.

Type a description for how the new resource is being used into the box labelled 'Item used for:' and select an appropriate build phase. Next click the little calculator button in the middle of the window to change the usage factor for the selected material.

The Usage Factor Calculator allows you to tell EstimatorXpress how much of this material is going to be used per metre squared or alternatively how many metres squared we can get out of a pack. In this example we can see from the product description that the pack contains 2.481m² so enter that into the second box.   Click **OK** to close the Usage Factor Calculator, then OK again on the Edit resource window.

Repeat this process to add in all of the resources required, setting the usage factors so that it allows for a price for each resource per m².

On the Resources Output screen you should see that the Total Cost of Groups at the top of the screen increases with each resource that you are adding; this total cost is directly related to the area calculated from the dimensions section of the worksheet.

If you click the Back button to go back to the dimensions screen you can see this for yourself by changing the length and breadth dimensions.

After you have completed adding all the required materials and labour to the worksheet you can now save it for use in other estimates. To do this click on **Save as Template** from the toolbar in the workbook summary screen. Enter a name for your new workbook and select a template type. Once you have clicked **OK** your workbook will be added to EstimatorXpress permanently.
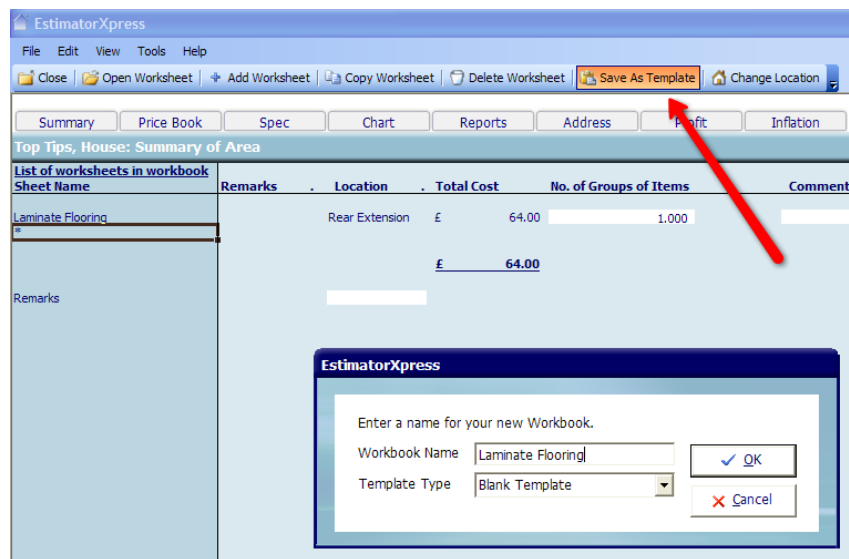
Got a question?
Call 0870 850 0199 to contact the HBXL Support Team.