Rapid Estimator
User Tutorials

Step-by-step guides for everyday tasks in Rapid Estimator.

SDSI Business Systems · Tech Support (951) 461-8490

Screen labels can vary slightly by release. Folder paths match standard Windows installs. If a menu name differs, follow the labels in your copy of the program.

Contents

1. Step by Step: Creating an Estimate

This tutorial covers the basic path from a new estimate through a finished report. It is a reminder of what to do next—not a full explanation of every screen.

Step One: Starting

- Open the Estimate tab and select New.
- Give the estimate a title, then click OK.
- Choose new or existing customer, then select Continue.
- Fill in customer information in the middle column. All fields from Name through Zip code (except Company) must be complete.
- If the job-site address matches the customer address, check Use Customer Information. Otherwise enter the job-site address.
- Verify markups at the bottom of column three.
- Click Save when finished. You may be prompted to create a cover page.

Step Two: Phases

A phase is usually a part or area of the project (for example a kitchen or bath). Create as many phases as the project needs.

- Select a pre-made phase title and choose Add Phase to Estimate.
- Enter base dimensions so the program calculates quantities, or enter quantities manually while building the estimate.

Step Three: Adding Cost Items

- Open the Cost Books tab.
- Choose a cost book. Multiple cost books can be used in a single estimate.
- Tag items to transfer, then select Transfer to Estimate.

Step Four: Adding a Contract

- With the estimate open, open the Contracts tab.
- Choose a contract, click Show Preview, then Save Contract.

Note: After saving, the contract must appear at the bottom of the left column to be attached to the open estimate.

Step Five: Reports

- Open the Reports tab and choose a report with the drop-down options.
- Preview the report; close and choose another if needed.
- Use Save as PDF or Upload and Email to deliver the report.

2. Backup & Restore

Back up Rapid Estimator and restore from that backup.

Important: Back up both Rapid Estimator data and Legacy (HomeTech) data for a complete restore.

Backup

- Log in and open the Utilities tab.
- In the far-right column, toggle between the two databases. The database marked with a black circle is active. Back up both databases.
- From the top menu, select Backup Database.

- Choose a save location with Browse (default path recommended), then Backup, then OK.

Typical locations: C:\Users\Public\RapidHomeData and C:\Users\Public\HTAdvantageData

- Select the second database, save, and repeat the backup.

Restore on the same computer

- On Utilities, choose Restore Database. Restore both databases.
- If you used the default path, select Restore. The program closes automatically.
- Reopen, select the second database on Utilities, Save, and restore again.

Restore on a different computer

- Copy both backup files to a flash drive or shared folder from the paths above.
- On the new computer, paste into the same paths.
- Log in, Utilities → Restore Database, and restore both databases.

3. Changing Markups

Markup is the percentage used to calculate sales price. It can be changed on line items, phases, customers, or defaults.

Line items

- With an estimate open, click the markup field on a line item, type the value, press Enter.

Note: Applies only to the open estimate.

Phases

- Estimate tab → Add/Edit Phase → select phase → edit Phase Markups → Save and Exit.

Note: Applies only to that phase in the open estimate.

Customers

- Customer tab → select customer → change markups at bottom of column three → Save.

Note: Affects the open estimate and future estimates for that customer only.

Default

- Utilities tab → change default markups at top of first column → Save.

Note: Applies to estimates created after the change unless overridden.

4. How to Create a User Cost Item

Add custom cost items to any division or subdivision.

Note: Cost items are division-specific. Create the item again in another division if you need it there.

- Select the cost book database where you want the item.
- Choose a division (left column), expand a subdivision (plus sign).
- Right-click any cost item → Add/Edit Cost Item.
- Select Add Cost Item (top left). Choose Yes to build from the selected item.
- Edit the duplicate (new item code), then Save Changes.

Note: “Added” means a new item was created. “Updated” means the original item was changed instead.

- Click Close. The new item appears highlighted at the top of the grid.

5. Creating a Subdivision

A subdivision is a section within a division (shown in blue under a division in Cost Books).

- Open the Subdivision tab.
- Select the parent division in Division Description.
- Click Add Subdivision.
- Pick a SubDiv number in a gap between existing numbers so the list stays organized.
- Enter the number and description, then Save.

Note: A subdivision appears under Cost Books only after it contains at least one cost item.

6. Updating the Area Modifier

The area modifier is updated periodically (typically quarterly) for your geographic market.

- Open Links → Get Latest Service Pack. The program closes.
- Enter serial number and password. Call (951) 461-8490 if you need password help.
- Download the latest service pack, verify info, Continue, and run the installer.
- Log back in → Cost Books → Update Modifier/Change Area → Update.

7. Transferring Estimates Between Computers

Sender

- Close the estimate.
- Email yourself (or the receiver) and attach the estimate XML from C:\Users\Public\RapidHomeData\EstimateDocs.

Receiver

- Download the attachment.
- Estimate tab → Import → Browse to the file → Import.
- Open the estimate, then Save As. Adjust the title (remove “Revised” if present; bump the revision number).

Note: For USB or cloud folder transfers, see tutorial 18: Send and Import.

8. Updating the Service Pack

Workstations and server

- If login shows Updates are Available, click Get Updates. Otherwise Links → Get Latest Service Pack.
- Enter serial number and password on the admin site.
- Download and install the latest service pack (typically OK → Unzip → Install → OK).

Note: Subscription messages on the download site are informational and do not always mean expiration.

Server only (modifier after install)

- Cost Books → Update Modifier / Change Area → Update.
- Back up when prompted, then complete the modifier update.

9. Working with Contracts

Use pre-made templates, create contracts from scratch, or paste a Word contract. Close all estimates before permanent template changes.

Modify a template

- Contracts tab → select a Template Contract → Save Contract As with a new title.
- Select the copy → Show Field Text to edit.
- Use Merge Fields for placeholders such as {Client Name}. Show Preview fills them from the open estimate.
- Insert or delete merge fields from the top menu; type additional text as needed; Save As when finished.

Create from scratch

- Close estimates → Add Contract → title → Save → Show Field Text.
- Insert merge fields (customer data from Customer tab; contractor data from Utilities → Contractor Information).
- Format with the toolbar; right-click for tables and colors; Save Contract As.

Paste a Word contract

- In Word: Ctrl+A, Ctrl+C. In Rapid Estimator: Add Contract, paste with Ctrl+V, Save As.
- Show Field Text and replace customer-specific text with merge fields.

10. Adding a Logo

- Close all estimates.
- Utilities → Contractor Information → Browse to Upload Logo → select image → Save.
- Under Utilities → Reports and Printing, enable options such as Print Estimate Cover Page, Print Logo on Reports, and Include Estimate Contracts.
- Save. Logos appear when you preview or print from Reports.

11. Working with Phases (Add & Reorder)

A phase organizes cost items. Every estimate needs at least one phase, with markups for Material, Labor, Subcontractor, and Other.

Note: Dimensions are optional. Enter them if you want quantities calculated from dimensions.

Add a phase

- Estimate open → Add/Edit Phase → pick or create a phase name → Add Phase to Estimate.
- Optional: enter base dimensions (for example 8 × 10 × 8), then Save and Exit.

Change phase order

- Reorder Phases → use green arrows → Apply.

12. Changing the Customer on an Estimate

- Open the estimate → Customer tab → Change Customer on Estimate.
- Select the customer from the list.
- Click Change Customer on Estimate a second time, then Save.

Note: You must click the option again after selecting the customer or the change will not apply.

13. Renaming an Estimate

Option 1 — Save As

- Estimate tab → Save As → edit the title → OK. Creates a duplicate (often titled with Revised).

Option 2 — Customer tab

- Customer tab → double-click Estimate Title in column three → type new name → Save.

14. How to Create an Assembly

An assembly is a pre-built group of cost items transferred into an estimate at once. Assemblies are cost-book specific.

Option 1 — From an estimate

- Expand the estimate grid, multi-select items (Ctrl or Shift), right-click → Create Assembly.
- Choose a folder, name the assembly, Create.

Option 2 — From the Assembly tab

- Assembly tab → category (or Add Category) → Create Assembly → name it.
- Add Items to Assembly → tag cost items → Transfer To Assembly → Save Changes.

15. Using Assemblies

- Open the estimate and create the destination phase.
- Insert Assembly → pick category and assembly.
- Uncheck items you do not want this time (does not change the saved assembly).
- Transfer to Estimate → select phase(s) → Transfer to Estimate again.

16. Working with Phases (Full Reference)

Phase Master List

- Edit Master List → New → description → Save. Delete unused titles as needed.

Estimate Phases

- Add Phase to Estimate (new name or from master list). Delete Phase from Estimate removes a phase from the open estimate.

Phase Offsets

A smaller rectangular area tied to phase base dimensions. Multiple offsets allowed.

- Add Offset → name → enter L/W/H (height matches phase) → enter Common wall length → Internal or External.

Note: Common is required so shared walls are not double-counted.

Base and custom dimensions

Enter base L/W/H for automatic quantities, or leave blank and enter quantities manually. Custom dimensions (linear feet, wall/floor/roof SF) can also drive calculations.

Phase Markups

Defaults come from Utilities. Changes here affect only the selected phase on the open estimate.

17. Moving Cost Items

Note: Moved items become user items and are not updated during modifier updates. Prefer copying program items rather than editing originals.

Subdivision to subdivision

- Cost Book → right-click item → Add/Edit Cost Item → Add Cost Item → Yes to build from selected.
- Choose target SDiv → Save Changes.

Division to division

No one-click move. Copy fields in Notepad (description, specs, UofM, costs, man-hours), create a new item in the target division/subdivision, paste values, Save Changes.

18. Send and Import

Close all estimates first.

- Estimate tab → Send → pick estimate → choose destination (USB, OneDrive, etc.).
- On the other computer, copy the .xml into C:\Users\Public\RapidHomeData\EstimateDocs.
- Estimate tab → Import → Browse to EstimateDocs → select estimate → Import.

19. Adding an Image to a Cost Item

Add image

- Copy the image into C:\Program Files (x86)\Rapid Home\Images (or your install path).
- Cost Books → right-click item → Add/Edit Cost Item → Add Item Sketch or Photo → Upload → Save.

Print on report

- Utilities → Reports and Printing → check Include Cost Item Photo or Sketch.
- Add the item to the estimate and preview or print from Reports.

Need more help?

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