

Converting Estimates to Goldenseal

These instructions cover the conversion of MacNail and BidMagic estimates into Goldenseal.

Conversion Basics

Goldenseal is able to read in data from BidMagic and MacNail. It creates an Estimate transaction with breakdowns that include all of the line items in the original bid.

This manual explains how to do it.

Preparing MacNail Data

To export estimates from MacNail Estimating, you need to use Estimating Manager 3.5.

There are two ways to export data from MacNail estimates:

1. You can export a breakdown of costs by category from the Summation portion of an estimate..
2. You can export the specific line item costs from the Specifications portion of an estimate.

To export a category estimate from MacNail Estimating, follow these steps:

1. Prepare the estimate in MacNail, as you usually do, or open an existing estimate.
2. Choose Goldenseal Summation from the Data menu (Excel 5 or earlier) or the Format menu (Excel 5 and later).
3. MacNail will automatically create a summation report. You can find it in the Current Reports folder inside the Estimates folder. It will have the name of the estimate, plus today's date.

To export an itemized specs estimate from MacNail Estimating, follow these steps:

1. Prepare the estimate in MacNail, as you usually do, or open an existing estimate.
2. Choose Goldenseal Specs from the Data menu (Excel 5 or earlier) or the Format menu (Excel 5 and later).
3. MacNail will automatically create a specs report. You can find it in the Current Reports folder inside the Estimates folder. It will have the name of the estimate, plus today's date.

Preparing BidMagic Data

There are two ways to export data from BidMagic bid:

1. You can export a breakdown of costs by category from the Bottom Line.
2. You can export the specific line item costs from the Specifications portion of a bid.

To export a category estimate from BidMagic, follow these steps:

1. Prepare a bid in BidMagic, as you usually do, or open an existing bid.
2. Choose Export Bottom Line from the Data menu.
3. Choose a name and location for the file, then click OK.

To export an itemized specs estimate from MacNail Estimating, follow these steps:

1. Prepare a bid in BidMagic, as you usually do, or open an existing bid.
2. Choose Export Specifications from the Data menu.
3. Choose a name and location for the file, then click OK.

Importing to Goldenseal

To import an estimate from either MacNail or BidMagic into Goldenseal, follow these steps:

1. Open a Goldenseal company file.
2. Choose Import from the File menu, and choose Estimate from the submenu.
3. Navigate to the location of the file you exported from MacNail or BidMagic, select it, then click Open.
4. Goldenseal will automatically create an Estimate transaction. If you exported specs, the estimate will include an Item breakdown of each specifications line item. Otherwise it will include a Category breakdown.