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Using Charm Estimating Software

Charm™ is a general purpose estimating software package.   By using the Customize Labor, Customize Materials, Customize Equipment, and Customize Subcontracts dialogs you can customize Charm to reflect your business. There is also a Templates feature with which you can save often used scenarios.

To begin, enter your business name and contact information and the customer you are preparing the estimate for on the Setup tab (after you type in your contact information, Charm will keep track of it for you).   If you want to customize the materials, labor, equipment, or subcontracts, click the appropriate button on the setup tab.   If you want to set your default tax rates, default customer,   or default margins you can click the General Settings button.

The Materials, Labor, Equipment, and Subcontracts tabs are very similar.   You can choose a category, then select or type in an item in the combo-box next to "Choose or Enter an   Item".   If you type an item in, make sure it is in the correct format:
[Price][Space][Description]
for example,
4.50 2X4 Fir/each

You can use a currency symbol, but it must be the currency symbol that is currently selected as the default in the general settings.

Make sure the number in the Units box is correct.   You can adjust it by clicking the up-down control (the control with two arrows on it).   If you need a fraction, you can type it in (use only a decimal point and numerals).

The margins can be changed either manually or using the up-down controls.   To add tenths, you must edit them manually.   The fields will only accept digits and decimal points. You can adjust the margins using the up-down control.   The margin can be any value between 0 and 99.99.   Please note that the margins are percent *margin*, not percent markup.

After the units and margin are correct, click "Add".   If you want to delete something, select it and click "Delete".

The defaults for the margins can be changed using the general settings dialog, available from a button on the Setup tab.

After you have added items of material, labor, equipment, and/or subcontracts, you can view the results on the Results tab.

You can view reports by clicking either the "View Report with Details"   button or the "View Report without Details" button.

If you want to minimize the main window, you can choose Minimize from the system menu (the little icon at the top left of the main window), or you can *right* click the title bar (the top of the window) and select Minimize.

Margin is figured using a standard formula.   The selling price is equal to the buying price over   the quantity one minus the margin expressed as a decimal (you should use a percent, Charm does the conversion).

The Setup Tab

The setup tab contains a space for the name of your company, the name of your customer, and seven buttons.

The four buttons which are labeled Customize Materials, Customize Labor, Customize Equipment, and Customize Subcontracts will launch a dialog box which will let you add and delete items and organize categories, so that you have the items you need organized in the way you want.

Save Template
Template files contain all the data for a given scenario, so if you have certain sorts of work which you do regularly, you can create a template so that you can store that information and then pull it up later. Once you click this button, you will get a standard file save dialog box. Type in a descriptive file name, then click save. You do not need to add an extension.   The default extension, .cht, will be added automatically.

Open Template:
Once you have created a template, opening it will recall all the stored values. If you have data you need to save prior to opening a template, you may want to save it as a template, or view and print out or save a report.

General Settings:
Click this to get a dialog box which will let you set the default for Customer, Tax Rates for each category, Labor Margin, Equipment Margin, Subcontracts Margin, Materials Margin, and Default Currency Symbol (the currency symbols available are the Dollar, Pound, and Yen symbols).

Templates

Templates are used to save the information from scenarios that are commonly used.   Once you have saved a template, open it when needed.   If you have data you need to save prior to opening a template, you may want to save it as a template, or view and print out a report.

The template are created and recalled using buttons on the Setup tab.   When a template is saved, all the data associated with that scenario are saved, including customer, margins, currency symbol, company name, tax rates, etc.   The next time you open that scenario, you will recall all of that information.

The Materials Tab

There are two ways to add materials to your estimation.   You can type the item into the items combo-box (next to "Choose or Enter an Item"), or you can choose a category using the categories combo-box (next to "Choose a Category") and then choose an item from the items combo-box.   When you choose a category, all of the items in that category will be added to the items combo-box.   Customizing the categories and items is discussed in another help topic.

If you want to type in an item, be sure to use the format:
[Price][Space][Description (30 characters maximum)]
for example
5.12 Ream of Paper

The number in the units box can be adjusted using the up-down control to the right of the box, or it can be adjusted manually.

The margin is initially set to the default margin.   You can then adjust it up or down using the up-down control to the right of the margin box, or you can set it manually. To add tenths, you must edit the number manually.   The field will only accept digits and decimal points.   The margin can be any value between 0 and 99.99.   Please note that the margins are percent *margin*, not percent markup.

When the item, number of units, and margin are correct, click Add to add it.

If you need to delete an item that you have added, you can click on it, and then click delete.

The total will be kept track of for you in the edit control at the bottom right and on the results tab.

The Labor Tab

There are two ways to add labor items to your estimation. You can type the item into the items combo-box (next to "Choose or Enter an Item"), or you can choose a category using the categories combo-box (next to "Choose a Category") and then choose an item from the items combo-box.   When you choose a category, all of the items in that category will be added to the items combo-box.   Customizing the categories and items is discussed in another help topic.

If you want to type in an item, be sure to use the format:
[Price][Space][Description (30 characters maximum)]
for example
12.00 hourly compensation for Carpenter

The number in the units box can be adjusted using the up-down control to the right of the box, or it can be adjusted manually.

The margin is initially set to the default margin.   You can then adjust it up or down using the up-down control to the right of the margin box, or you can set it manually. To add tenths, you must edit the number manually.   The field will only accept digits and decimal points.   The margin can be any value between 0 and 99.99.   Please note that the margins are percent *margin*, not percent markup.

When the item, number of units, and margin are correct, click Add to add it.

If you need to delete an item that you have added, you can click on it, and then click delete.

The total will be kept track of for you in the edit control at the bottom right and on the results tab.

The Equipment Tab

There are two ways to add equipment to your estimation. You can type the item into the items combo-box (next to "Choose or Enter an Item"), or you can choose a category using the categories combo-box (next to "Choose a Category") and then choose an item from the items combo-box.   When you choose a category, all of the items in that category will be added to the items combo-box.   Customizing the categories and items is discussed in another help topic.

If you want to type in an item, be sure to use the format:
[Price][Space][Description (30 characters maximum)]
for example
45.00 Rental of Rototiller per day

The number in the units box can be adjusted using the up-down control to the right of the box, or it can be adjusted manually.

The margin is initially set to the default margin.   You can then adjust it up or down using the up-down control to the right of the margin box, or you can set it manually. To add tenths, you must edit the number manually.   The field will only accept digits and decimal points.   The margin can be any value between 0 and 99.99.   Please note that the margins are percent *margin*, not percent markup.

When the item, number of units, and margin are correct, click Add to add it.

If you need to delete an item that you have added, you can click on it, and then click delete.

The total will be kept track of for you in the edit control at the bottom right and on the results tab.

The Subcontracts Tab

There are two ways to add subcontracted labor to your estimation. You can type the item into the items combo-box (next to "Choose or Enter an Item"), or you can choose a category using the categories combo-box (next to "Choose a Category") and then choose an item from the items combo-box.   When you choose a category, all of the items in that category will be added to the items combo-box.   Customizing the categories and items is discussed in another help topic.

If you want to type in an item, be sure to use the format:
[Price][Space][Description (30 characters maximum)]
for example
20.00 Contract Security per hour

The number in the units box can be adjusted using the up-down control to the right of the box, or it can be adjusted manually.

The margin is initially set to the default margin.   You can then adjust it up or down using the up-down control to the right of the margin box, or you can set it manually. To add tenths, you must edit the number manually.   The field will only accept digits and decimal points.   The margin can be any value between 0 and 99.99.   Please note that the margins are percent *margin*, not percent markup.

When the item, number of units, and margin are correct, click Add to add it.

If you need to delete an item that you have added, you can click on it, and then click delete.

The total will be kept track of for you in the edit control at the bottom right and on the results tab.

Results

The results tab contains information calculated with the information you provided, and two buttons with which you can launch the report viewer.   The totals are divided into labor, materials, equipment, subcontracts, the tax rate on each category can be set separately.   The grand total (the sum of the totals after tax) is shown beneath all the totals after tax (subtotals).

You can <u>view reports</u> by clicking either the "View Report with Details"   button or the "View Report without Details" button.

The report with details includes a list of labor items, materials items, equipment, subcontracts, totals for each category before and after tax, and grand total.

The tax rate can be changed manually.   The defaults for the tax rate and margins can be changed using the general settings dialog, available from a button on the Setup tab.

The report without details omits the list of labor items, materials items, equipment, subcontracts.

Report Viewer

The main purpose of the viewer is to present the estimate and give the opportunity to edit, print, or save the estimate. The default format for saving is Rich Text Format, which you should use if you want to save the formatting.   The report viewer combines ease of use with formatting capabilities.   If you are in the viewer and you want to return to the estimator, the easiest way is to click the button on the toolbar that looks like the Charm icon.

You can format your report with the viewer.   You can set the attributes of text to bold, italic, or underlined, and text can be aligned left, centered, or right.   If you want more control over text formatting, you may want copy the text by using "Select All"   and then "Copy" from the edit menu.   You can then paste it into a word processing program.

Customization

Charm was designed to be readily customizable by the end user.   To change the list of materials, labor items, equipment, or subcontracts, press the appropriate button on the Setup tab.

The materials,   labor, subcontracts, and equipment   customization dialog boxes all work the same.   Choose a category (in the next paragraph customizing categories is discussed), enter a description and a cost and press the Add button (or hit a return).   The cost should be input as a number, for example 1.25.   If you need, for example, 1.50 per dozen eggs, put "dozen eggs" in the description, then put "1.50" in the cost textfield. To delete an item, highlight it in the list of items, then click Delete.   Once you have entered an item, you can modify by double clicking on it in the list.   It will be deleted from the list and the information from the item added to the description and cost text fields.   Just modify the cost or description and click add to add it once again to the list of items.

To customize categories, click the Categories button on a customize dialog (click one of the customize buttons on the setup tab to launch a customize dialog).   You will see a list of categories.   To add a new category, type it in the Category textfield and click Add or hit a return.   To delete a category **and all the items in the category** select it and click Delete.   If you want to modify the name of a category, type in the new name in the Category textfield, select the name of the category you want to modify, then click Modify.   Modifying the name of a category will keep all of the items in the category, only the category name will change.

Templates can be created to save common scenarios, then opened to retrieve them.

The "General Settings" button will bring up a dialog box that permits settings the default tax rates and margins, currency symbol, and default customer.

Registering

Single user licenses for Charm cost $30.00 US.   For information on multi-user, site, and corporate licenses, please contact us (software@lithic.com) for more information.   You can register your copy of Charm by sending your name and a check or money order for $30.00 US (for a single user license) to:

Lithic Software Corporation
P. O. Box 2994
Grand Junction, CO 81502
USA

For online ordering information, please stop by the following URL:
http://www.lithic.com/ordering/ordering.html

All the upgrades through the end of version 1 are free to registered users of Charm (you can upgrade by downloading and installing upgrades when they become available).

After you register, a registration number and instructions will be sent to you via email (if you supply an email address) and then by postal mail.

Name and Mailing Address:

Email Address (please be sure that it is legible):

Using Charm on a Network

Charm has been tested on a file mapped multi-user network and works correctly if the user has read/write/create access to the directory that Charm is loaded from, and the server has long filenames enabled.

The shareware version of Charm was primarily designed as a standalone application for use by contractors and other small businesses to create bids.   Because Charm looks for defaults and information for the materials, labor, equipment, subcontracts, and license in the file it was loaded from, and because it saves information to some of these files when it quits, the user on a multi-user network must have read and write access to the files for this to work properly.

A version that is designed specifically for use on file mapped networks is scheduled for release in February, 1999. The interface will be almost exactly the same as the shareware version of Charm, but there will be additional options which will let users set the directories and file names (to support short filenames) from which to read the default information.   Another planned features is user control over whether files are updated when the application quits.

If you are interested in more information about the networkable version, please contact software@lithic.com .

About Charm

Charm is a general purpose estimating software package.   It can help businesses that produce goods or services prepare estimates and bids for potential customers.   Users can look at many scenarios, and can save common scenarios for future use.

There is some additional software at the Lithic Software Corporation website:
http://www.lithic.com/software/software.html

Charm is shareware, feel free to use it for evaluation.   If you like it, register within 30 days and you will get a Registration Number which will keep Charm active.   If you have any comments, send them via email.

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