



Residential Estimator Program

Getting Started

October 2003



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Introduction

Overview

Residential Estimator is an easy-to-use program that provides an accurate, quick and flexible method of determining up-to-date replacement costs for residential structures found throughout the United States and Canada. Part of the SwiftEstimator suite of programs available through the Internet, it is based on the square foot method in Section A of the *Residential Cost Handbook* (which has been published by Marshall & Swift for over 40 years).

This is the latest step in the evolution of Residential Estimator, first introduced by Marshall & Swift in 1984. This section of the *User Guide* presents the basic steps you need to start using Residential Estimator. This includes the following two tutorials that you can use to learn the program basics.

- **Tutorial 1:** Basic steps for using the help system and for entering, calculating and printing estimates.
- **Tutorial 2:** Saving, editing and deleting estimates, and entering garages and basements as separate sections.

The remaining sections in this *User Guide* are reference sections for the following items:

- ***Program Reference***, which contains complete instructions for all of the features in Residential Estimator, grouped by type of feature.
- ***Worksheet Reference***, which contains complete definitions of each of the data items you can input into Residential Estimator, relating them to the paper Worksheet you can use in the field to collect data for your estimates.

You should read this *Getting Started* section in the order it is written. The tutorials introduce the basics of program usage, then build on these basics. As tutorials, they do not cover all possible options in the programs. You can use the two reference sections in a random order when you need more information about a particular topic.

Obtaining Technical Support

If you encounter a problem with the installation or operation of Residential Estimator, first refer to this *User Guide* or the help system for a solution. If the problem cannot be resolved in this way, or you have questions not answered in this *User Guide*, please call us at one of the following technical support numbers:

1-800-526-2756 or
1-213-683-9000

Fax: 1-213-683-9043

Support Hours: Monday - Friday, 7 a.m. until 4 p.m. Pacific Time

When calling technical support, please have the following information available:

- Browser type and version (e.g., Internet Explorer 5, Version 5.00.3103.1000). You can usually find the browser version in by selecting Help then About when using the browser.
- Internet Connection Method (DSL, Cable Modem, Dialup Modem including connection speed, etc.).
- Operating system (Windows® 98, Windows® NT, Windows® XP, etc.).
- Printer make and model number if you are having printing problems.
- An exact description of your question or problem, including what you were doing when the problem occurred.
- The exact text of any error messages.

Starting SwiftEstimator

Before using either of the tutorials, you need to start SwiftEstimator as follows:

1. Go to www.swiftestimator.com in your Web browser.
2. When the **Welcome** screen displays, click the **Current Users Login Here** button.
3. When the **Login** screen displays, type your User Name and Password, then click the **Login** button:

SwiftEstimator™ The Future of Appraising...

Home | The Estimators | Support | Join Now | Pricing Information MarshallSwift.com | Contact Us

Commercial Estimator	New Requirements, Same Solutions... Fannie Mae, the Cost Approach and Manufactured Housing: How it Affects You Government sponsored Fannie Mae recently announced a new addendum has been added to the necessary requirements for assessing the value of the manufactured housing type. In an effort to enhance the quality of manufactured home appraisals, Fannie Mae is now requiring that a detailed and supported cost approach be added to all manufactured housing appraisals.... CLICK HERE TO LEARN MORE...	Member Login username: <input type="text"/> password: <input type="password"/> <input type="button" value="LOG IN"/> Forgot your password? Need more help logging in? CLICK HERE
Residential Estimator		
Segregated Estimator		
Office Build-Out Estimator		
Commercial Contents & Inventory		

Join Now!
Not Already a Member? Join Now!
[CLICK HERE TO JOIN](#)

4. SwiftEstimator displays the **New Estimates/Search** screen:

SwiftEstimator **MARSHALL & SWIFT**
THE BUILDING COST PEOPLE
ADMINISTRATION LOG OUT

New Estimates

Click here to create a new Estimate:

Create A New Estimate

Search

To find an existing estimate, select a Search Type and enter a Search Text below:

Search Type Search Text

Recent Activity Search

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Tutorial 1: Entering Calculating and Printing an Estimate

This tutorial covers the steps required to enter a new estimate, calculate the costs and print a report. Specifically, in this tutorial you learn how to:

- Enter the basic information about a residence.
- Display help for an individual field on a screen.
- Use the help Table of Contents and Index.
- Calculate estimate costs.
- Preview and print cost reports.
- Close an estimate.

The steps for the tutorial begin on the following page.

Before beginning this tutorial, start SwiftEstimator using the steps on page 3.

Create a New Estimate

Within Residential Estimator, you can move from screen to screen using either of the following methods:

- **Sequential Navigation Buttons:** These buttons take you to the previous screen or to the next screen, and are located below the data area on each screen.
- **Random Navigation Menu:** This menu allows you to move directly to any of the screens listed on the left.

These are located as follows:

The screenshot displays the SwiftEstimator Residential Estimator interface. The sidebar on the left contains a 'Random Navigation Menu' with options: General Info, Building Data, Depreciation, Section, Components, Additions, Remarks/Notes, Adjustments, Reports/Calc, Save, Save As..., and Close. The main area is titled 'Residential Estimator' and shows 'Estimate ID: TEST-1234'. The 'Building Data' section includes the following fields:

Residence Type	Single-family Reside		
Style	Split Level	%	100
Second Style		%	
Total Floor Area *	2258	(sq feet)	400 - 25000
Number of Units			
Quality	Average / Good		
Condition	Average		

*=Required

Sequential Navigation Buttons: << General Information, Depreciation >>

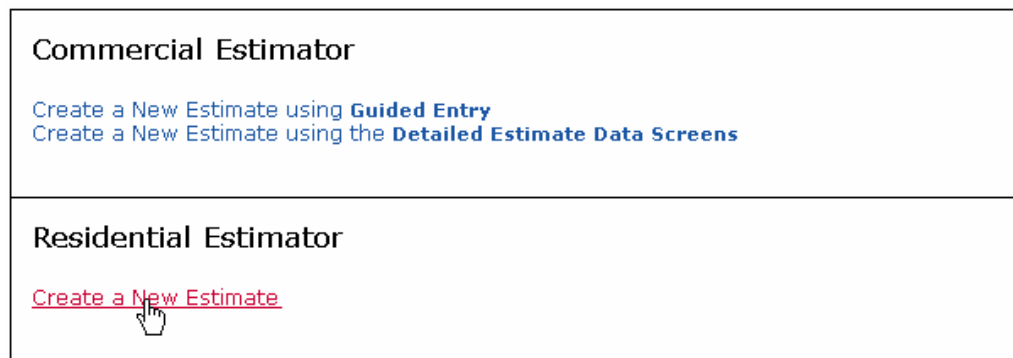
©2002-2003 Marshall & Swift

Begin creating a new estimate as follows:

1. Click the Create a New Estimate button on the **New Estimates/Search** screen:



2. When the **New Estimate** screen displays, click "Create a New Estimate" under Residential Estimator:



Enter the General Information

The first screen, **General Information**, allows you to enter general information about an estimate. Some or all of this general information prints at the top of the reports. Use the **Tab** key to move from field to field on this screen.

1. Residential Estimator starts out in the **Estimate ID** field on the **General Information** screen. You can tell this by the blinking vertical line at the beginning of this field (called the “cursor”).

Estimate ID*

Type **TEST-1234** in this field.

2. Press the **Tab** key to move to **Property Owner**, then type **David Grant**.
3. Continue entering information in this manner until your screen appears as follows:

General Information		Estimate ID:
Estimate ID*	<input type="text" value="TEST-1234"/>	
Property Owner	<input type="text" value="David Grant"/>	
Address	<input type="text" value="123 Hill Street"/>	
City	<input type="text" value="Los Angeles"/>	
State/Province	<input type="text" value="CA"/> <input type="text" value="California"/>	
ZIP/Postal Code*	<input type="text" value="90017"/>	
Construction Type*	<input type="text" value="Site Built"/>	
Survey Date	<input type="text" value="10/10/2003"/>	
Surveyed By	<input type="text" value="Zachary Hopkins"/>	
Comment	<input type="text"/>	
Appraisal For	<input type="text"/>	
* =Required		

Building Data >>

Note: **Estimate ID**, **Construction Type** and **ZIP/Postal Code** are required fields, i.e., you must make entries in these fields.

Enter the Building Data

The next data entry screen is for Building Data, which includes the type, style, size, quality, condition and depreciation information for the residence.

1. Click the **Building Data >>** button at the bottom of the **General Information** screen to display the **Building Data** screen.
2. Click on the name Style to the left of the style field:

Building Data Estimate ID: TEST-1234

Residence Type	Single-family Residence		
Style	One Story	%	100
Second Style		%	

Residential Estimator displays the help for this field:

Style - Microsoft Internet Explorer

[Show Contents/Index/Search](#)

Style

The styles available in Residential Estimator are dependent on the residence type as follows:

- **Single-Family Residences:** All styles
- **Low-Rise Multiples:** One Story, Two Story and Three Story styles only
- **Town Houses:** One Story, Two Story, Split level, 1½ Story Finished and 2½ Story Finished styles only
- **Duplexes:** One Story and Two Story styles only

See the [Style Comparison](#) for a description of each available style.

You can select one or two styles for an estimate. If you select one style, enter 100% for that style. If you select two styles, enter the percentage for the first style. Residential Estimator automatically sets the percentage of the second style to 100% minus the percentage for the first style.


Example: The entry for a two-story single-family residence is:

Style	Two Story	%	100
Second Style	One Story	%	

Example: The entries for a residence that is 65% two story and 35% one story are:

You can display the help for an individual field by clicking on the field name. Click the Close (X) button in the upper right corner of the screen to close the help window.

Getting Started

- Click the  button for Style. When the list of available styles displays, click “Split Level”:

Building Data Estimate ID: TEST-1234

Residence Type	Single-family Resident	
Style	Split Level	% 100
Second Style	One Story	%
	Two Story	
Total Floor Area *	Three Story	00 - 25000
	Split Level	
Number of Units	1 1/2 Story Finished	
Quality	1 1/2 Story Unfinished	
Condition	2 1/2 Story Finished	
	2 1/2 Story Unfinished	
*=Required	3 1/2 Story Finished	
	3 1/2 Story Unfinished	
	Bi-level	

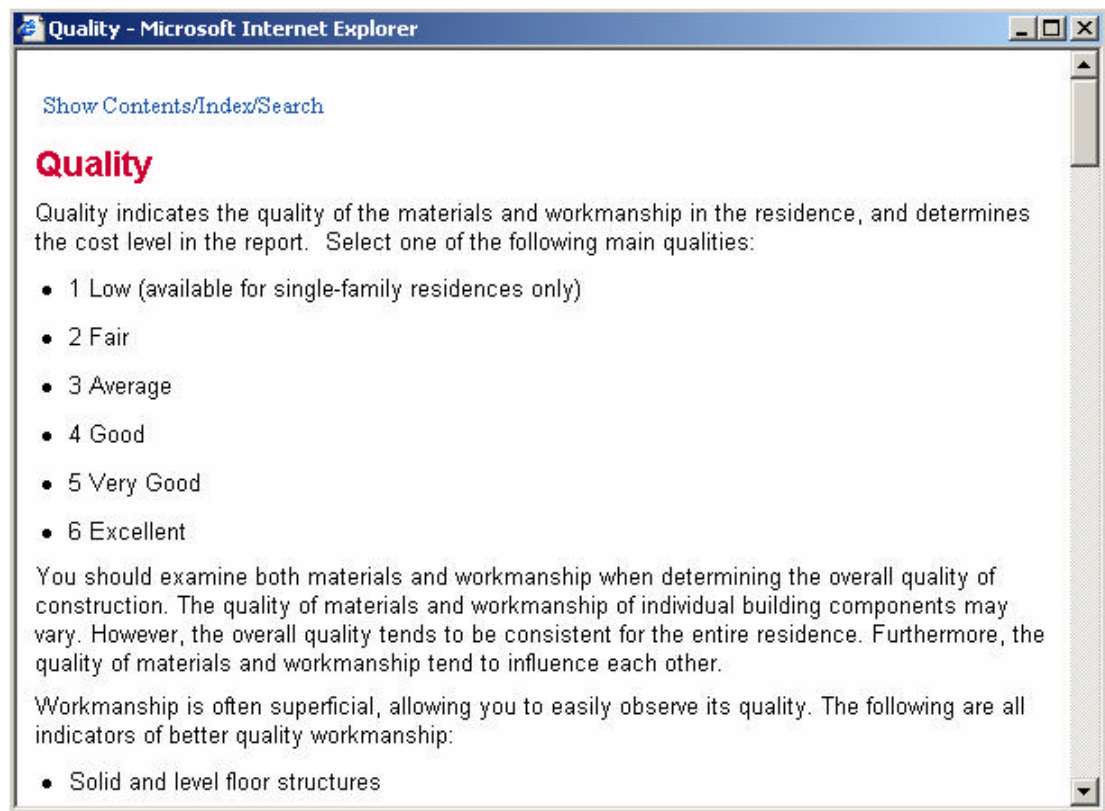
[ral Information](#) [Depreciation >>](#)

“Split Level” displays as the selected style:

Style %

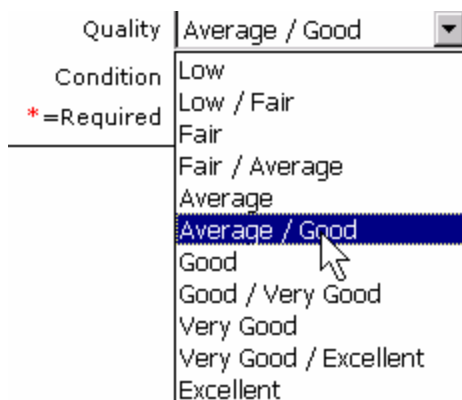
- Press the **Tab** key several times to move to Total Floor Area, type **2258**.

5. Press the **Tab** key again to move the cursor to the quality field. Press the **F1** key to display the help for quality:



You can display help for an individual field by placing the cursor in that field, then pressing the **F1** key. Click the Close (X) button in the upper right corner of the screen to close the help window.

6. Select the quality Average/Good in the quality drop-down list:



Getting Started

The Building Data screen now appears as follows:

Building DataEstimate ID: TEST-1234

Residence Type

Single-family Residence

Style

Split Level

%

100

Second Style

%

Total Floor Area *

2258

(sq feet)

400 - 25000

Number of Units

Quality

Average / Good

Condition

Average

* = Required

<< General Information

Depreciation >>

Enter the Depreciation

The **Depreciation** screen allows you to specify how to handle depreciation for the estimate, and to enter the buildings effective age and typical life.

1. Click the **Depreciation >>** button at the bottom of the **Building Data** screen to move to the **Depreciation** screen.
2. Select Combined Physical & Functional:

☒ Combined Physical & Functional
☐ Separate Physical %

then enter **15** for Combined Physical and Functional Depreciation and **10** for the Effective Age. The **Depreciation** screen now appears as follows:

Depreciation
Estimate ID:TEST-1234

Building Depreciation
 Select how to set the building depreciation, which is applied to all building components that are not separately depreciated. [Tell Me More.](#)

☐ Marshall & Swift Tables
☒ Combined Physical & Functional %*
☐ Separate Physical %
 And Functional %
☐ Age/Life (Straight Line)
☐ None

Additional Depreciation
 External Depreciation %

Effective Age
 Enter the Effective Age, not the Actual Age or the Year Built:
 Effective Age Years

Typical Life
 Select how to set the typical life, which is used if you set the Building Depreciation above to either Marshall & Swift Tables or Age/Life.
☒ Marshall & Swift
☐ Entered Value Years

*=required

<< Building Data
Sections >>

Enter the Components

The **Components** screen allows you to specify the construction components for the residence (exterior walls, roofing, floor covering, etc.).

1. Since we are skipping the **Sections** screen in this tutorial, click the **Components** link on the left side of the screen to move to the **Components** screen:

General Info
Building Data
Depreciation
Sections
Components
Additions
Remarks/Notes
Adjustments

Depreciation Estimate ID: TEST-1234

Building Depreciation
 Select how to set the building depreciation, which is applied to all building components that are not separately depreciated. [Tell Me More.](#)

☐ Marshall & Swift Tables
☒ Combined Physical & Functional 15 %*
☐ Separate Physical %

2. Residential Estimator displays the **Assumptions** screen:

Assumptions Estimate ID: TEST-1234

Exterior Walls	101: Frame, Hardboard Sheets	100 %
	101: Frame, Hardboard Sheets	%
Roofing	220: Wood Shingle	100 %
	202: Built-up Rock	%
Heating/Cooling	309: Forced Air Furnace	100 %
Plumbing Fixtures (#)	11	
Plumbing Rough-ins (#)	1	
Raised Subfloor	100	%
Slab on Grade		%
Partitions: Drywall	100	%
Partitions: Plaster		%

☒ Automatic Floor Cover Allowance
☒ Automatic Appliance Allowance

This shows the components that Residential Estimator will automatically load. Do the following:

- Change the first Exterior Wall type from “Frame, Hardboard Sheets” to “Frame, Siding, Vinyl,” then type **75** for the percentage.

- Change the second Exterior Wall type to “Veneer, Brick,” then type **25** for its percentage.
- Select “Composition Shingle” for the Roofing type.
- Select “Warmed and Cooled Air” for the Heating/Cooling type.
- Type **12** for the number of Plumbing Fixtures.
- Type **75** for the Raised Subfloor percentage. Residential Estimator automatically sets the Slab on Grade percentage to 25%.
- Click the box to the right of “Automatic Floor Cover Allowance” to remove the check.

The screen now appears as follows:

Assumptions
Estimate ID:TEST-1234

Exterior Walls	107: Frame, Siding, Vinyl	75	%
	131: Veneer, Brick	25	%
Roofing	208: Composition Shingle	100	%
	202: Built-up Rock		%
Heating/Cooling	351: Warmed & Cooled Air	100	%
Plumbing Fixtures (#)	12		
Plumbing Rough-ins (#)	1		
Raised Subfloor	75	%	
Slab on Grade	25	%	
Partitions: Drywall	100	%	
Partitions: Plaster		%	
<input type="checkbox"/> Automatic Floor Cover Allowance <input checked="" type="checkbox"/> Automatic Appliance Allowance			
<input type="button" value="OK (Use Assumptions)"/>		<input type="button" value="Cancel (Skip Assumptions)"/>	

Getting Started

- Click the **OK (Use Assumptions)** button on the **Assumptions** screen. Residential Estimator automatically loads the components indicated on the **Assumptions** screen, displaying them in the Selected Component table at the bottom of the **Components** screen:

Components
Estimate ID:TEST-1234

Use this screen to enter components for the main house, or garage or basement sections.

Components For: Main

Add A Component
To add a component, type its Code (or click on a System, click on a component, then click select), enter its units or percent and optional information, then click Add.

System

- Exterior Walls
- Roofing
- Heating/Cooling
- Floor Cover
- Appliances
- Miscellaneous

Component (double click to select)

Definition
Select

Code	System/ Component	Units	Percent	Quality	Dep %	Age	Life
<input type="text"/>							Add

Existing Components
Use these fields to change a component, or click delete to delete a component.

Code	System/ Component	Units	Percent	Quality	Dep %	Age	Life
107	Exterior Walls Frame, Siding, Vinyl		<input type="text" value="75"/>				delete
131	Exterior Walls Veneer, Brick		<input type="text" value="25"/>				delete
208	Roofing Composition Shingle		<input type="text" value="100"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	delete
309	Heating/Cooling Forced Air Furnace		<input type="text" value="100"/>		<input type="text"/>	<input type="text"/>	delete
502	Appliances Automatic Appliance Allowance			<input type="text"/>	<input type="text"/>	<input type="text"/>	delete
602	Miscellaneous Plumbing Rough-ins (#)	<input type="text" value="1"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	delete
601	Miscellaneous Plumbing Fixtures (#)	<input type="text" value="12"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	delete
622	Miscellaneous Raised Subfloor (% or SF)	<input type="text"/>	<input type="text" value="75"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	delete
621	Miscellaneous Slab on Grade (% or SF)	<input type="text"/>	<input type="text" value="25"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	delete

<< Sections
Additions >>

Note: If you click the **Cancel (Skip Assumptions)** button on the **Assumptions** screen, there will be no components displayed on this screen. You must enter

components using the steps on the following page. If you don't, the **Assumptions** screen will display again the next time you move to the **Components** screen.

- Click on "Floor Cover" in the Systems list to display all floor cover components:

System

- Exterior Walls
- Roofing
- Heating/Cooling
- Floor Cover**
- Appliances
- Miscellaneous

Component (double click to select)

- 402: Automatic Floor Cover Allowance
- 401: Floor Cover Allowance (\$)
- 426: Bamboo Laminated Planks (SF or %)
- 427: Block, Wood, Treated (SF or %)
- 428: Brick Pavers (SF or %)
- 429: Brick, Common (SF or %)

Definition **Select**

Scroll down the Component List and click on "Carpet and Pad," then click the **Select** button. Residential Estimator copies this to the Add area and places the cursor in the Units column:

System

- Exterior Walls
- Roofing
- Heating/Cooling
- Floor Cover**
- Appliances
- Miscellaneous

Component (double click to select)

- 429: Brick, Common (SF or %)
- 411: Carpet and Pad (SF or %)**
- 430: Carpet, Custom High-Value (SF or %)
- 431: Carpet, Indoor/Outdoor (SF or %)
- 412: Ceramic Tile (SF or %)
- 434: Ceramic Tile, Custom, High Value

Definition **Select**

Code	System/ Component	Units	Percent	Quality	Dep %	Age	Life	
411	Carpet and Pad (SF or %) Floor Cover							Add

Press the **Tab** key to move to the Percent column, type 65, then click **Add**:

Code	System/ Component	Units	Percent	Quality	Dep %	Age	Life	
411	Carpet and Pad (SF or %) Floor Cover		65					Add

Residential Estimator copies this component to the Selected Components list below the Add area. If you do not know the component numbers, you can find components using these search steps.

- Click in the Code field in the Add area, type **412** and press the **Tab** key. Residential Estimator automatically displays the component's name (Ceramic Tile), Units (SF or %) and System (Floor Cover) in the second column:

Getting Started

Code	System/ Component	Units	Percent	Quality	Dep %	Age	Life	
412	Ceramic Tile (SF or %) Floor Cover							Add

Press **Tab** again to move to the percentage field, type **20**, then click **Add** to add the component to the Selected Components list. If you know the component numbers (such as when you are using the Worksheet), you can quickly enter them directly using these steps.

6. Use either of these methods to add the following floor coverings:

- 413 Hardwood, 10%
- 435 Marble, 5%

The floor cover components you just added now appear in the Selected Components area as follows:

411	Floor Cover Carpet and Pad (SF or %)		65					delete
412	Floor Cover Ceramic Tile (SF or %)		20					delete
413	Floor Cover Hardwood (SF or %)		10					delete
435	Floor Cover Marble (SF or %)		5					delete

7. Add the following for Land Value and Site Improvements, entering the dollar amounts for these items in the Units column:

- 691 Land Value, 85000
- 694 Site Improvements (Undepreciated), 6750

These components now appear in the Selected Components list as follows:

691	Land/Site Land Value (\$)	85000						delete
694	Land/Site Site Improvements, Below Depr. Cost (\$)	6750						delete

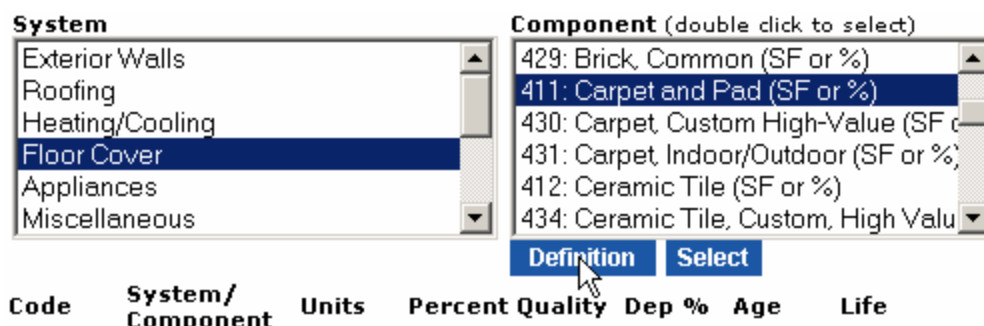
8. Change the Land value to 95000 by clicking in the Units column for the component you just added, then typing 95000. The Land Value now appears as follows:

691	Land/Site Land Value (\$)	95000						delete
-----	------------------------------	-------	--	--	--	--	--	--------

Use Additional Help System Features

In addition to displaying help for individual fields on the screen, you can also get help for any component on the **Components** page, and can access the full help system through the Table of Contents and Index.

1. Click on “Floor Cover” in the Systems list to display all floor cover components, scroll down the Component List and click on “Carpet and Pad,” then click the **Definition** button:



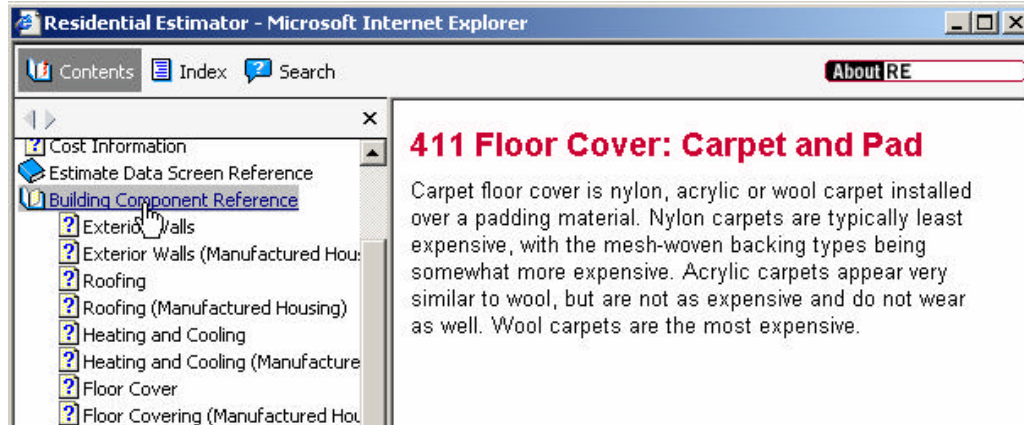
Residential Estimator displays the help for Carpet and Pad:



2. Click On “Show Contents/Index/Search” in the upper left of the help screen:



3. A Table of Contents, Index and Search area display on the left of the help screen, with the Table of Contents visible. Click on “Building Component Reference” in the Table of Contents. Residential Estimator displays the topics in the Building Component Reference under the “Building Component Reference” name:



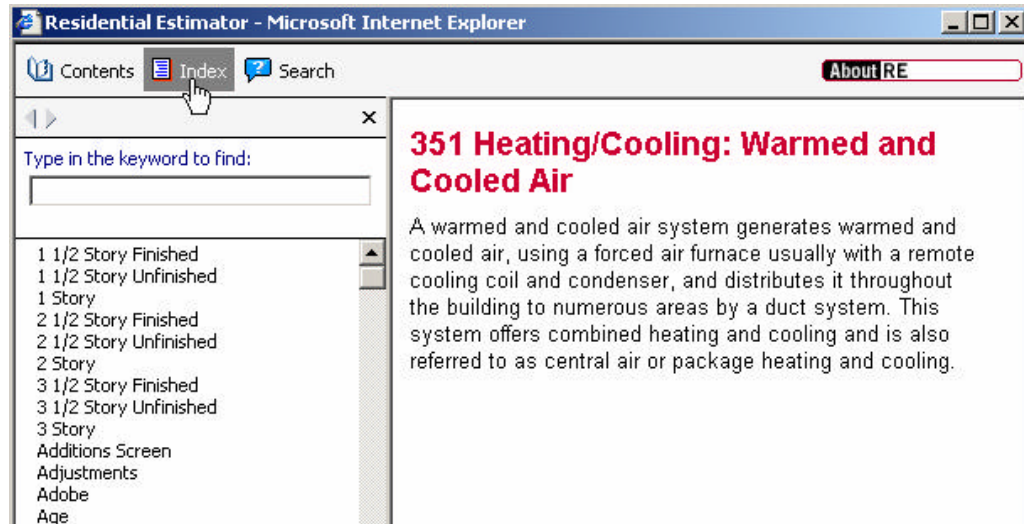
4. Click the topic "Heating and Cooling." Residential Estimator displays a list of all available Heating and Cooling components:



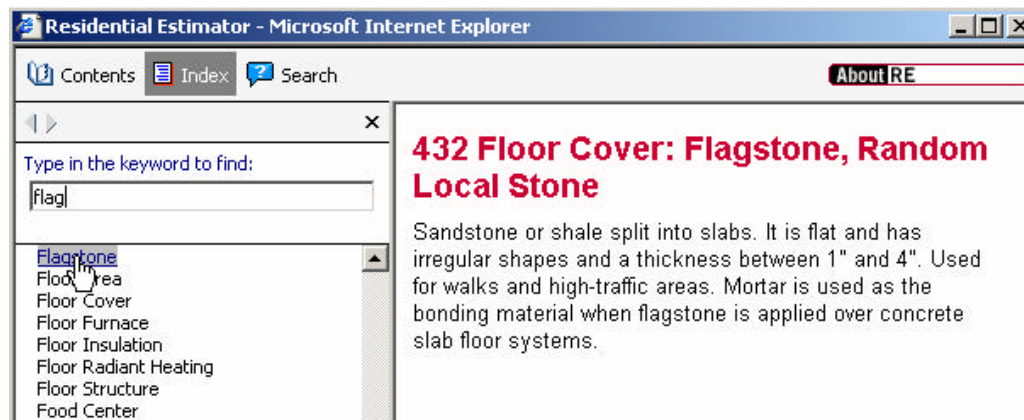
5. Click on any of these heating types to display the help for that type. You can use the Table of Contents to display help for any data entry screen or the components in any construction system within Residential Estimator.

Getting Started

- Click on “Index” in the upper left side of the help window. Residential Estimator displays the index:



- Type “flag” in the keyword field on the left side of the screen, then click “Flagstone” in the index list. Residential Estimator displays the help for Flagstone:



You can use the Index to find the help for any item available in Residential Estimator.

- Click the Close (X) button in the upper right corner of the help window to close the Help window.

Calculate and Print the Estimate

We are skipping the **Additions**, **Remarks/Notes** and **Adjustments** screens here, since they are optional, and you enter data on it in the same manner as the screens we have already covered. See the second tutorial for examples of these screens.

The **Reports** screen allows you to calculate and print the estimate you have entered.

1. Click **Reports/Calc** in the left-side navigation menu to display the **Reports** screen:

General Info
Building Data
Depreciation
Sections
Components
Additions
Remarks/Notes
Adjustments
Reports/Calc
Save
Save As...
Close

Reports Estimate ID: TEST-1234

Report Type Download Format
 Data Entry HTML Download Print Preview Calculate

Data Entry Report

General Information
 Estimate ID: TEST-1234
 Property Owner: David Grant
 Address: 123 Hill Street
 City: Los Angeles
 State/Province: CA
 ZIP/Postal Code: 90017
 Surveyed By: Zachary Hopkins

The report displayed here is the Data Entry Report, the only report available before you have calculated the costs.

2. Click the **Calculate** button on the **Reports** screen to calculate and display the costs. The following displays to indicate what you will be charged for the calculation:

Item	Item Price	Quantity	Price
Charges for this calculation:			
SwiftEstimator - Residential Estimator	\$6.00	1	\$6.00
New Total:			\$6.00
Enter a Promotional Code if applicable:			<input type="text"/>
			Apply
Continue		Cancel	

If you do not want to incur this charge, click **Cancel**, read the rest of this section, then close the estimate using the steps on page 27. Otherwise, click **Continue** to calculate the costs (and be charged the amount indicated), then complete the rest of this section.

Getting Started

3. When Residential Estimator has calculated the costs, it displays the following Short Report:

Reports Estimate ID: TEST-1234

Report Type Download Format

Short HTML Download Print Preview Calculate

Short Report

Estimate ID TEST-1234
Property Owner David Grant
Address 123 Hill Street
City Los Angeles
State/Province CA
ZIP/Postal Code 90017
Surveyed By Zachary Hopkins
Survey Date 10/10/2003
Appraisal For

Cost As Of 10/2003

Single-family Residence

Description	Units	Unit Cost	Total
Base Cost	2,258	\$46.37	\$104,703.00
Basic Structure Total Cost	2,258	\$74.24	\$167,631.00
Replacement Cost New	2,258	\$74.24	\$167,631.00
Physical + Functional Depreciation 15.0%			\$25,146.00
Total Depreciated Cost			\$142,485.00
Land			\$85,000.00
Site Improvements			\$6,750.00
Non Building			\$91,750.00
Total			\$234,235.00

Cost data by Marshall & Swift, L.P.

[<< Cost Adjustments](#)

4. Use the Report Type drop-down list to select the Depreciation Report:

Reports

Report Type

Short

Standard

Short

Data Entry

Depreciation

1007 Report

The Depreciation Report displays:

Reports
Estimate ID:TEST-1234

Report Type

Depreciation

Download Format

HTML

Download

Print

Preview

Calculate

Depreciation Report

Single-family Residence

Effective Age 10

Cost as of 10/2003

Style Split Level

Exterior Wall Frame, Siding, Vinyl 75%
Veneer, Brick 25%

Plumbing Fixtures 12

Floor Area 2258 Square Feet

Quality 3.5 Average / Good

Condition 3 Average

Description	Units	Unit Cost	Cost New	Depr	Depr Cost
Base Cost	2,258	\$46.37	104,703.00	15,708.00	\$88,995.00
Plumbing Fixtures	12	\$1,244.10	14,929.00	2,239.00	\$12,690.00
Composition Shingle	2,258	\$1.33	3,003.00	450.00	\$2,553.00
Raised Subfloor	1,694	\$8.08	13,688.00	2,053.00	\$11,635.00
Slab on Grade	564	\$5.19	2,927.00	439.00	\$2,488.00
Carpet and Pad	1,468	\$3.56	5,226.00	784.00	\$4,442.00
Ceramic Tile	452	\$11.94	5,397.00	810.00	\$4,587.00
Hardwood	226	\$10.60	2,396.00	359.00	\$2,037.00
Marble	113	\$32.45	3,667.00	550.00	\$3,117.00
Forced Air Furnace	2,258	\$3.24	7,316.00	1,097.00	\$6,219.00
Plumbing Rough-ins	1	\$435.00	435.00	65.00	\$370.00
Appliance Allowance	1	\$3,944.00	3,944.00	592.00	\$3,352.00
Basic Structure Total Cost	2,258	\$74.24	167,631.00	25,146.00	\$142,485.00
Replacement Cost New	2,258	\$74.24	167,631.00		
Physical + Functional Depreciation 15.0%				25,146.00	\$142,485.00
Total Depreciated Cost				25,146.00	\$142,485.00
Land			85,000.00		\$85,000.00
Site Improvements			6,750.00		\$6,750.00
Non Building			91,750.00		\$91,750.00
Total			259,381.00	25,146.00	\$234,235.00

5. Click the **Print** button on the **Reports** screen:

Reports
Estimate ID:TEST-1234

Report Type

Short

Download Format

HTML

Download

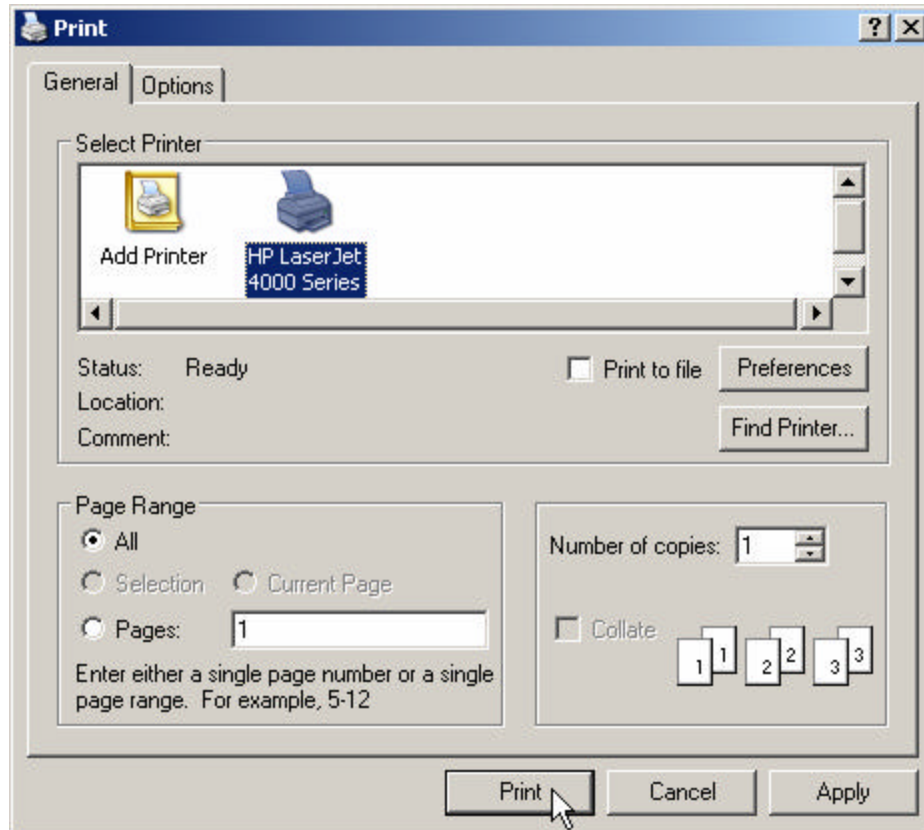
Print

Preview

Calculate

Getting Started

6. When a **Print** screen such as the following displays, select the printer to use (if necessary) then click the **Print** button:



Close the Estimate

Since we are now finished with this estimate, click on the “Close” link on the left side of the screen:

General Info

Building Data

Depreciation

Sections

Components

Additions

Remarks/Notes

Adjustments

Reports/Calc

Save

Save As...

Close

Estimate ID: TEST-1234

Reports

Report Type

Depreciation

Download Format

HTML

Download

Print

Preview

Calculate

Depreciation Report

Single-family Residence

Effective Age 10

Cost as of 10/2003

Style Split Level

Exterior Wall Frame, Siding, Vinyl 75%

Plumbing Fixtures 12

Floor Area 2258 Square Feet

Quality 3.5 Average / Good

Condition 3 Average

Description	Units	Unit Cost	Cost New	Depr	Depr Cost
Base Cost	2,258	\$46.37	104,703.00	15,708.00	\$88,995.00
Plumbing Fixtures	12	\$1,244.10	14,929.00	2,239.00	\$12,690.00
Composition Shingle	2,258	\$1.33	3,003.00	450.00	\$2,553.00
Raised Subfloor	1,694	\$8.08	13,688.00	2,053.00	\$11,635.00

Congratulations! You have now learned how to create, enter, change, calculate, preview, print and close an estimate using Guided Entry. You can now exit SwiftEstimator by clicking the **Log Out** button in the upper right portion of the screen, or continue with Tutorial 2.

Tutorial 2: Additional Data Entry, Saving, Editing and Deleting Estimates

In this tutorial, you learn how to:

- Enter a garage (or basement) as a separate section.
- Enter additions.
- Enter remarks and notes.
- Enter cost adjustments.
- Save estimates.
- Open and change existing estimates.
- Delete saved estimates.

The steps for this tutorial begin on the following page.

If you are not currently using SwiftEstimator, start it using the steps on page 3.

Search For and Edit An Estimate

Residential Estimator automatically saved your estimate when you closed it in the first tutorial.

Use the Search section of the **New Estimates/Search** screen to list saved estimates, then edit or delete them. Residential Estimator provides a flexible search mechanism that allows you to locate estimates based on key data fields, including Estimate ID, Property Owner Name, Address, City, ZIP/Postal Code and Comment:

1. In the Search section in the middle of the **New Estimate/Search** screen, select “Recent Activity” as the Search type, then click the **Search** button:

Search

To find an existing estimate, select a Search Type and enter a Search Text below:



2. When Residential Estimator displays the estimates you have changed most recently, click Edit in the Options column of the estimate you created in the first tutorial (TEST-1234):

Application	Estimate ID / Project Name	Property Owner	Updated Options
RE	TEST-1234	David Grant	10/13/2003 Edit Delete
CE	ABC-123	Chuck Roast	10/13/2003 Edit Delete

Getting Started

3. Residential Estimator opens this estimate and displays the General Information screen with the information you entered in the first tutorial:

General Info	General Information	Estimate ID:TEST-1234
Building Data	Estimate ID* <input type="text" value="TEST-1234"/>	
Depreciation	Property Owner <input type="text" value="David Grant"/>	
Sections	Address <input type="text" value="123 Hill Street"/>	
Components	City <input type="text" value="Los Angeles"/>	
Additions	State/Province <input type="text" value="CA"/>	
Remarks/Notes	ZIP/Postal Code* <input type="text" value="90017"/>	
Adjustments	Construction Type* <input type="text" value="Site Built"/>	
Reports/Calc	Survey Date <input type="text" value="10/10/2003"/>	
Save	Surveyed By <input type="text" value="Zachary Hopkins"/>	
Save As...	Comment <input type="text"/>	
Close	Appraisal For <input type="text"/>	
	* =Required	
		Building Data >>

Create a Garage Section

Residential Estimator has two methods for entering garages and basements (and tagalongs for manufactured housing): Separate Sections and Complete Components. The Separate Section method allows you to define the exact construction of the garage or basement by defining a separate section as follows:

- Use the **Sections** screen to add a garage or basement section.
- Use the **Components** screen to specify the construction characteristics of the garage or basement.

The Separate Sections method is a more accurate method than the complete component method because you describe the garage or basement exactly as it is built. This method also allows you to set a different quality and/or depreciation for the garage or basement than for the main residence.

1. Click the **Sections** link on the left side of the screen:

General Info	General Information	Estimate ID: TEST-1234
Building Data	Estimate ID* TEST-1234	
Depreciation	Property Owner David Grant	
Sections	Address 123 Hill Street	
Components	City Los Angeles	
Additions	State/Province CA	
Remarks/Notes		
Adjustments		

2. In the Type drop-down, select “Attached Garage,” press **Tab** twice to move to Size and type 560, then click **Add**:

Add A Section

To add a section, select the Type, enter the size and optional information, then click Add.

Type	Description	Size*	Quality (3)	Depreciation %	Effective Age	Typical Life	
Attached Garage	Attached Garage	560 (sq ft)					Add

Getting Started

3. Residential Estimator adds an Attached Garage section to the Existing Sections list:

Existing Sections

Use these fields to change a section, or click delete to delete a section (including all of its components)

Type	Description	Size*	Qual (3.5)	Dep (15%)	Age (10yrs)	Life	
Attached Garage	Attached Garage	560 (sq ft)					delete

4. Move to the components screen, then select the Attached Garage in the Components For drop-down:

Components For: 1. Main
1. Main
2. Attached Garage

Add A Component

To add a component, type its Code (or click a

5. Add the following components:

- Exterior Walls: 107 Frame, Siding, Vinyl 60%
- Exterior Walls: 131 Veneer, Brick 40%
- Roofing: 208 Composition Shingle 100%
- Garage: 766 Garage Finish, Attached 560 square feet

The Existing Components section now appears as follows:

Existing Components

Use these fields to change a component, or click delete to delete a component.

Code	System/ Component	Units	Percent	Quality	Dep %	Age	Life	
107	Exterior Walls Frame, Siding, Vinyl		60					delete
131	Exterior Walls Veneer, Brick		40					delete
208	Roofing Composition Shingle		100					delete
766	Garage Garage Finish, Attached (SF)	560						delete

Enter Additions

Additions allow you to enter costs for items that are not available in Residential Estimator.

1. Move to the **Additions** screen.
2. The Type indicates where the addition will print in the report. Select “Extra” as the type in the Add an Addition area of the screen:

Add An Addition

To add an addition, select the Type, enter the other information, then click Add.

Type	Description	Units	Cost*
Extra	Extra		
Depreciation %	Age	Life	LM Trend
			<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
			Base Date
			Add

3. Enter the following items in the remaining fields of the Add an Addition area:

- Description: Interior Fountains
- Units: 2
- Cost: 3500

Also, remove the checks from LM and Trend. The Add an Addition area now appears as follows:

Add An Addition

To add an addition, select the Type, enter the other information, then click Add.

Type	Description	Units	Cost*
Extra	Interior Fountains	2	3500
Depreciation %	Age	Life	LM Trend
			<input type="checkbox"/> <input type="checkbox"/>
			Base Date
			Add

4. Click the **Add** button. Residential Estimator adds the addition to the Existing Additions area of the screen:

Existing Additions

Use these fields to change an addition, or click del to delete the addition.

Type	Desc	Units	Cost*	Dep %	Age	Life	LM	Trend	Base Date	
Extra	Interior Fount	2	3500				<input type="checkbox"/>	<input type="checkbox"/>		del

Getting Started

5. You can use additions to enter costs from the *Residential Cost Handbook* (or *Marshall Valuation Service*). When you do this, you must complete the following additional fields in the Add an Addition area:

- **LM:** Check this to indicate that you want to apply the Local Multiplier to the cost (since the costs in the books are national average costs)
- **Trend:** Check this to indicate that you want to trend the cost from the Base Date (entered in the next field) to the Report Date (since the

The cost for a good quality, deluxe built-in safe on page B-23 of the *Residential Cost Handbook* (page dated 6/2003) is \$3,190. Enter the following into the Add an Addition area, then click Add:

Add An Addition

To add an addition, select the Type, enter the other information, then click Add.

Type	Description	Units	Cost*				
Basic	Deluxe Built-In Safe	1	3190				
Depreciation %	Age	Life	LM	Trend	Base Date	Add	
			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06/2003		

The Existing Additions area now appears as follows:

Existing Additions

Use these fields to change an addition, or click del to delete the additon.

Type	Desc	Units	Cost*	Dep %	Age	Life	LM	Trend	Base Date	
Extra	Interior Fount	2	3500				<input type="checkbox"/>	<input type="checkbox"/>		del
Basic	Deluxe Built-I	1	3190				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06/2003	del

Enter Remarks and Notes

Remarks and notes allow you to enter comments about a property. Remarks print in all reports, while notes only print in the Data Entry Report.

1. Click the Remarks/Notes link at the bottom of the **Additions** screen to display the **Remarks** screen.
2. Type the following remark and note:

Remarks and NotesEstimate ID:TEST-1234

Remarks

Fountain costs obtained from owner.

Notes

Large dog in back yard.

<< Additions

Cost Adjustments >>

Cost Adjustments

The **Cost Adjustments** screen contains optional fields that adjust the calculated costs or add additional items to the report. Except for Base Date, everything on this screen is optional. If you do not enter anything for an item, Residential Estimator will automatically use the value displayed on the right of the screen for that item.

1. Click the Adjustments link at the bottom of the **Remarks/Notes** screen to display the **Adjustments** screen.
2. Enter the following on this screen:
 - Rounding Value: 1000 (which prints an additional line in the report with the total cost rounded to the nearest \$1,000).
 - Report Date: 07/2001 (which tells Residential Estimator to calculate the costs as of July 2001 instead of the current month and year).
3. The top part of the **Adjustments** screen now appears as follows:

Cost Adjustments		Estimate ID:TEST-1234
All items on this screen (except Base Date) are optional. If you do not enter a value for a field, Residential Estimator uses the default value to the right of the field.		
		Default
Local Multiplier	<input type="text"/>	1.14
Local Multiplier Adjustment %	<input type="text"/>	0
Architects Fee %	<input type="text"/>	2.45
Rounding Value	<input type="text" value="1000"/>	0
Report Date (mm/yyyy)	<input type="text" value="07/2001"/>	10/2003
Single Line Back Date (mm/yyyy)	<input type="text"/>	10/2003
Base Date* (mm/yyyy)	<input type="text" value="10/2003"/>	10/2003
Effective Age Adjustment Value	<input type="text"/>	0
Depreciation % Adjustment Value	<input type="text"/>	0

Save the Changes to the Estimate

Use the **Save** option to update the data automatically saved in the first tutorial with the changes you have made in this tutorial.

1. Click the Save option at the bottom of the left side navigation menu:

General Info	Cost Adjustments	Estimate ID: TEST-1234
Building Data	All items on this screen (except Base Date) are optional. If you do not enter a value for a field, Residential Estimator uses the default value to the right of the field.	
Depreciation		
Sections		
Components		
Additions		
Remarks/Notes		
Adjustments		
Reports/Calc		
Save		
Save As...		
Close		

	Default
Local Multiplier	1.14
Local Multiplier Adjustment %	0
Architects Fee %	2.45
Rounding Value	0
Report Date (mm/yyyy)	10/2003
Single Line Back Date (mm/yyyy)	10/2003

2. Residential Estimator permanently saves the changes to the estimate, including both your input data and the calculation results.

Save the Estimate as a Separate Estimate

Use the **Save As** option to save the estimate as a new estimate, leaving the estimate you saved in the previous step unchanged.

1. Change the following on the **General Information** screen:

Property Owner: **Charles Tuna**

Property Address: **987 Dale Street**

2. Select **Save As**:

General Info
Building Data
Depreciation
Sections
Components
Additions
Remarks/Notes
Adjustments
Reports/Calc
Save
Save As...
Close

General Information Estimate ID: TEST-1234

Estimate ID* TEST-1234
Property Owner Charles Tuna
Address 987 Dale Street
City Los Angeles
State/Province CA
ZIP/Postal Code* 90017
Construction Type* Site Built
Survey Date 10/10/2003
Surveyed By Zachary Hopkins
Comment
Appraisal For
*=Required

Building Data >>

3. The following displays:

Save As... Estimate ID: TEST-1234

Estimate Id: Copy of TEST-1234

Save Cancel

Change the Estimate ID to TEST-9876:

Save As... Estimate ID: TEST-1234

Estimate Id: TEST-9876

Save Cancel

4. Residential Estimator saves the estimate as a new estimate, leaving the estimate you saved in the previous step unchanged.

Close the Estimate

When you close an estimate that contains changes that you have not saved, Residential Estimator asks you if you want to save the changes.

1. Change the City on the **General Information** screen to *New York* and the ZIP/Postal Code to *10010*.
2. Click Close in the left-side navigation menu:

General Info
Building Data
Depreciation
Sections
Components
Additions
Remarks/Notes
Adjustments
Reports/Calc
Save
Save As...
Close

General Information Estimate ID:TEST-9876

Estimate ID*	TEST-9876
Property Owner	Charles Tuna
Address	987 Dale Street
City	New York
State/Province	NY New York
ZIP/Postal Code*	10010
Construction Type*	Site Built
Survey Date	10/10/2003
Surveyed By	Zachary Hopkins
Comment	
Appraisal For	

*=Required

Building Data >>

3. Residential Estimator prompts if you want to save the data you just changed:

Close Estimate... Estimate ID:TEST-9876

You have made changes to this estimate which have not been saved.

Last Save Mon Oct 13 08:29:19 PDT 2003
Most Recent Change Mon Oct 13 08:32:04 PDT 2003

Please Select One:

Click **Save Changes, then Close** to save the changes and close the estimate.

Deleting Estimates

1. Select Estimate ID as the search type, enter TEST as the Search Text, then click the **Search** button:

Search

To find an existing estimate, select a Search Type and enter a Search Text below:

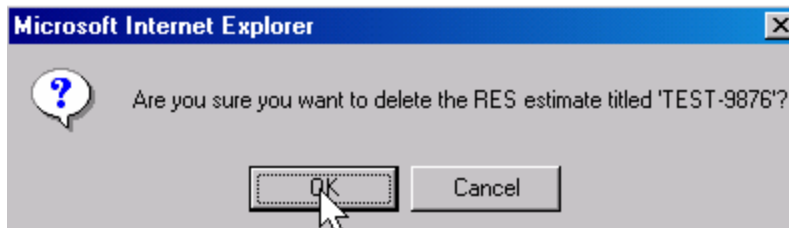
Search Type	Search Text	
Estimate ID/Project Name	test	Search

2. When SwiftEstimator displays all estimates with “TEST” as part of their Estimate ID, click the Delete link for the estimate you created in this tutorial (TEST-9876):

Your search returned 2 estimates.

Application	Estimate ID / Project Name	Property Owner	Updated Options
RE	TEST-9876	Charles Tuna	10/13/2003 Edit Delete
RE	TEST-1234	David Grant	10/13/2003 Edit Delete

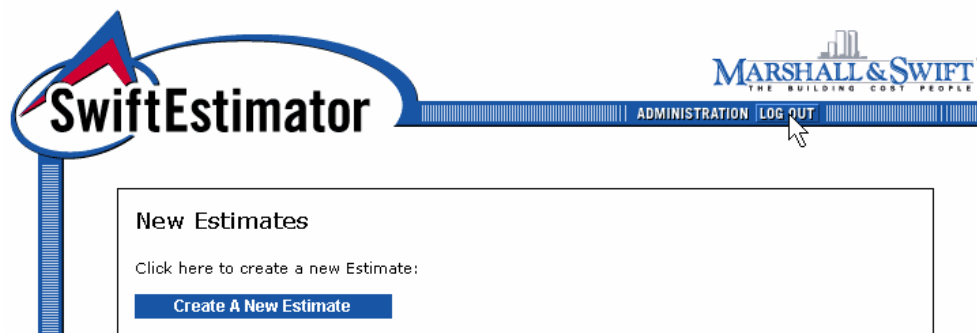
3. When the following displays, click **OK**:



4. Delete the estimate you created in the first tutorial (TEST-1234) in the same way.

You have now learned how to search for and edit estimates, enter a garage or basement as a separate section, enter additions, enter remarks and notes, enter cost adjustments, save changes to estimates and delete saved estimates.

You have completed the tutorials and can exit SwiftEstimator by clicking the **Log Out** button at the top of the screen:



For further details on the use of the Residential Estimator, refer to the help system or the remaining sections in this *User Manual*:

- ***Program Reference***, which contains complete instructions for all of the features in Residential Estimator, grouped by type of feature.
- ***Worksheet Reference***, which contains complete definitions of each of the data items you can input into Residential Estimator, relating them to the paper worksheet you can use in the field to collect data for your estimates.