



iPROsoft Pty Ltd
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Trade Contractors

CONTENTS

Marketing and Sales Support
Estimating
Project Budgets
Bills of Quantities and Measurements
For Project Managers Controlling Project Processes
For Service Managers Controlling Service and Maintenance Works
Tracking and Forecasting Events for Management and Financial Planning
Construction Industry Pay Roll
For Managers – Job Cost, Performance and Forecasting
For Chief Financial Officers
Project Documentation
U-LAUNCH Technology
Other Features

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Introduction

iPROsoft has served the needs of various types of project and service enterprises including; trade contractors. These organisations do the work directly on projects. Often they simultaneously run service and maintenance divisions. In so doing they employ large work forces. Trades contractors co-ordinate with main contractors and other subcontractors to deliver projects. They require a sophisticated, end-to-end and integrated system to bear their business processes so all their people work effectively together.

This brief description focuses on only 12 highlights of *iPROsoft* incorporated as configurable options to assist the Trade Service enterprise.

Marketing and Sales Support

The *iPROsoft* Clients / Prospects and Quotes / Estimates modules interact to assist marketing / sales departments track clients, prospects and contacts within those organisations. Prospective clients can be classified by industry and location as well as by secondary classifications. Sales personnel can be allocated to clients. Sales enquiries can be registered and tracked. They can also be linked to lead source to evaluate advertising and promotion. Quotations also can be registered and tracked.

These modules are of critical importance in assisting sales effectiveness, market analysis and sales forecasting.

Estimating

The estimating module can be configured in a number of ways. Some estimators prefer to use assemblies to perform rapid estimates. Others prepare templates for modeling projects. Each approach reduces risk and facilitates check listing.

With the proforma bills and rates in place a target estimate is created by copying the proforma. The target estimate is edited to become the project estimate. The editing tools include simple components copying, merging sections of other estimates into the current estimate, price list and tender lookups and quantity take offs.

Project Budgets

Project budgets can be read directly from estimates saving time and duplication. Once linked to a project the estimate is available to procurement and main contract claim application processes. Estimates can similarly be used to provide the budgets for contract variations. Depending on your business rules these budgets can be created and edited without the estimating module.

For Trade Contractors labour costs are the critical issue. To assist, *iPROsoft* project budgets can be expressed in terms of financials for each cost center / work type and also for labour hours. This includes variations where lump sum contract arrangements are in place.

Bills of Quantities and Measurements

Frequently, “estimate” can be a misnomer. Estimates comprise bills of quantities, they can be a fully specified bill of quantities for construction detailing either or both of logistics and claims applications. When that is the case additional *iPROsoft* tools can be brought to bear.

Purchase order and subcontract programs can copy and merge data stored in estimate bills of quantities, price lists and tender schedules into orders and subcontracts. Optionally orders can be bulk generated from estimate bills in project batches.

With this approach procurement can be more effectively controlled and risks reduced.

Client contract progress claim applications are commonly made up of summary progress certificates and schedules of contract values and proportions complete. Bills of quantities can be directly accessed from the claim application programs. Summary totals can be brought to the claim schedules from the bills. The bills along with the schedule, certificate and covering letter or invoice can all be printed to comprise the claim application package.

For Project Managers Controlling Project Processes

Support for project process is extensive. A common and requisite sample is summarized in the following list of *iPROsoft*-supported activities.

- Create purchase orders and subcontracts, applying cash retention retentions and other conditions.
- Expedite purchase orders and subcontracts; measure and control progress, value work in progress.
- Monitor and control purchase order and sub-contract variations.
- Value, approve and hold / release subcontract claim applications.
- Process subcontract claim / applications including those for recipient / buyer created tax invoices or self-billings.
- Generate “punch” and “snagging” lists.
- Produce subcontract progress certificates and payment vouchers.
- Monitor and control plant hired in.
- Forecast cost to complete.
- Generate project cost cash flow history and forecasts.
- Manage main contract variations and link them to sub-contract variations.
- Process main contract claim applications along with supporting progress certificates, claim break down schedules and bills of quantities measures.
- Standardise, create and control documentation ranging from correspondence, instructions and minutes of meeting through to drawings and specifications issue.

For Service Managers Controlling Service and Maintenance Works

Technical services departments are supported by *iPROsoft* with do & charge and fixed price service processes and an inventory module to assist in managing spare parts, stored consumables and van stocks.

Support for service works is extensive. With *iPROsoft* the service dispatch operator can process all the following expeditiously without leaving the service job program.

- Capture and log the job.
- Assign personnel.
- Dispatch / Email / SMS the works instructions.
- Log materials and labour consumed.
- Flag the job complete.
- Invoice the customer.

Additional support is available for planned maintenance within the same process. Maintenance activities can be logged in the background along with the details of the plant to be maintained, the date of the next service and the priority rating.

The difference in processing maintenance compared to adhoc service is that an enquiry prompts what is to be done together with where and when. And when the job is flagged as complete the next service is automatically scheduled according to the service frequency. At the same time the service history is maintained.

Tracking and Forecasting Events for Management and Financial Planning

The *iPROsoft* Milestone Scheduling module can be used to track activities / milestones, to compare performances of project managers or job types and forecast revenue flows.

Milestone Scheduling lets you know what's been, what's coming up, how much you will invoice and when.



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Construction Industry Pay Roll

Labour relations and labour management are critical issues for Trade Contractors. *iPROsoft* pay roll is fully featured, construction industry focused and timesheet based. Pay roll can incorporate the latest enterprise bargaining agreements.

Times are captured for each person and any number of jobs and work types. Options include daily and weekly timesheet capture. Timesheet form options are extensive and can involve batch or on-line processes.

Data captured in timesheets contributes directly to job costing, charges for do and charge service jobs and pay roll.

iPROsoft pay roll handles monthly, fortnightly and weekly pays. Its ideal for very large pay rolls and has options for deductions, superannuation, salary sacrifice, redundancy, banking, contract personnel and re-current pays. Human resources cater for personnel licences, inductions, and qualifications, entitlements, open-ended records and follow-ups.

For Managers – Job Cost, Performance and Forecasting

iPROsoft Job Cost, Forecast and Performance reporting can provide data details and summaries for projects and groups of projects. All have extensive “drill-down” capability. The same reporting can be output by Project Manager. Management work in progress reporting tracks the all-important claims in advance / arrears and the funding relationship.

For Chief Financial Officers

The *iPROsoft* accounting package is absolutely reliable and supports the CFO at every turn. Some significant inclusions are as follows.

- Multi-company and multi-branch capacity.
- Flexible roll down chart of accounts with totaling link accounts.
- Branch, company and group consolidations.
- General Ledger enquiry with transaction analysis filters and transaction drill downs into general and subsidiary ledgers.
- Extensive reporting covering profit and loss, balance, trial balance and account transactions.
- Accounts budgeting.
- Recurrent and auto-reversing journal options.
- Prior period data capture options.
- Ready control account reporting and reconciliation for creditors, debtors, retentions, GST and VAT as well as multiple bank and loan accounts. This reporting and reconciliation capability exists for current period, all prior periods in the current year and all periods in prior years.
- Compliance and supporting functionality for Withholding Tax (Australia) and CIS (United Kingdom).
- Compliance and supporting functionality option for CITB (United Kingdom).
- Multi-company options can provide for inter-company loan processes, which facilitate sophisticated funding arrangements common to property developments and join-ventures. Multiple treasuries are supported.
- Fully featured sub-ledgers including; creditors, debtors, payroll, inventory, job, cashbook and fixed assets.

Project Documentation

iPROsoft's integrates documentation management as an optional module. Management can define all document structures and forms. Users can create and extensively cross reference documents. The module covers all forms of correspondence, instructions, drawings, specifications, transmittals (cover sheets) and minutes of meeting with actions tracking. Documents are stored in the repository. The cross referencing and database simplify documentation identification and recovery.

The documentation module draws recipients data from the Clients / Prospects, Supplier / Subcontractor Database and Personnel Modules.

Projects involve reams of documentation. Effective document control yields cost and time savings, reduces risks and is at the core of quality in projects.

Document control need not be confined to projects.

U-LAUNCH Technology

U-LAUNCH is unique to *iPROsoft*. This technology is absolutely unequalled in providing "drill-downs" and user definable continuous paths of navigation, data capture and reporting. It's the winning advance yielding absolute user friendliness and quantum increases in productivity.

Other Features

Other features of *iPROsoft* cater to project enterprises as well as the broader spectrum of the construction industry in Australia, New Zealand and the United Kingdom. *iPROsoft* system features are calculated to boost the effectiveness of project and service enterprises.

The *iPROsoft* package provides an integrated and flexible framework for project organisation managers to implement policies and procedures across the whole enterprise. *iPROsoft* facilitates "everyone singing the same song".