KEYSTONE
Construction Software

Client Manager – Overview

The 'Client Manager' software by Keystone Construction Software is a plugin to Databuild, designed to assist in the preparation of quotes/tenders, pre-contract variations, post-contract variations and the client product and colour selection process.

The quote/tenders, pre-contract variations and post-contract variations modules allow for a mini bill of quantities (build-up) per client costing request. The build-up is populated from the current Databuild catalogue and cost centre structure. Once finalised, the accepted line item build-ups can be used to update the Databuild bill of quantities and/or cost centre budget control. The un-accepted line items are retained in the system for future reference negating the need for diary items or notes to record discussion points and costings.

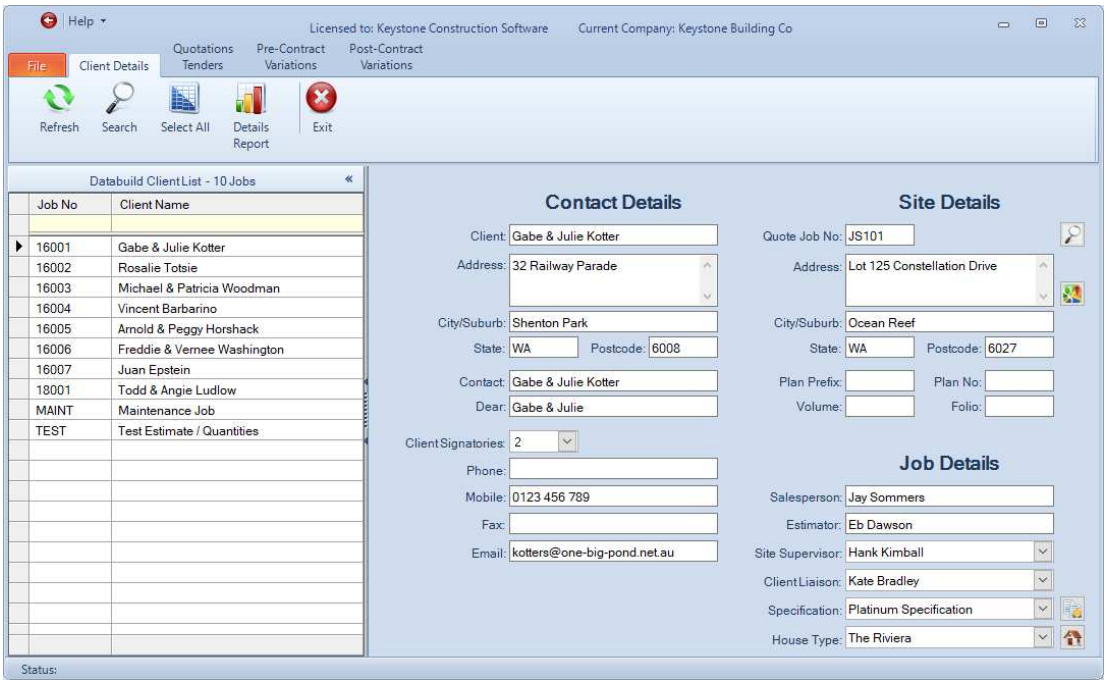
The client product and colour (addendum to the specification) selection process is a database driven menu system designed to utilise standard specification templates and facilitate the product and colour selection process. Client selections are then able to be uploaded to the Databuild purchase orders to eliminate costly order selection errors.

The integration between Databuild and Client Manager eliminates the need to maintain multiple job/client lists as all details are maintained in the Databuild database and the Client Manager simply looks up the current details.

Key Modules & Features

- Client Details

  The 'Client Details' module is primarily a lookup of the Databuild client list. Given the appropriate permissions, the client details can be edited from within the Client Manager software and saved back to Databuild. Additional fields are included to record site specific land details along with additional job details.



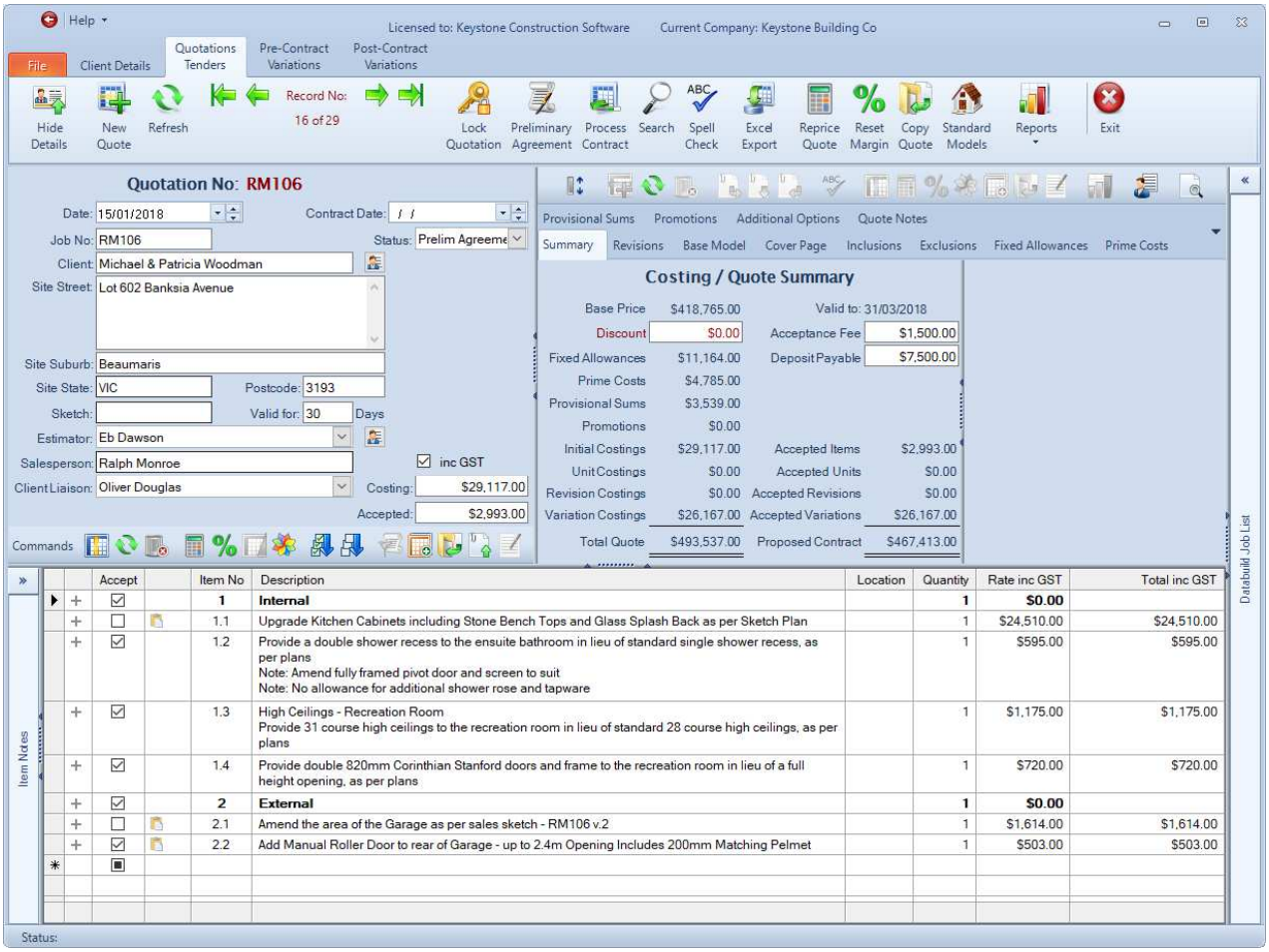
Key Modules & Features (cont.)

- Quotations/Tenders - Main

The 'Quotations/Tenders' module allows for the preparation of quotes/tenders based on standard house types or custom designs as a starting base. Individual line item client requests can then be costed utilising the Databuild cost centre structure along with catalogue items and/or recipes to form a build-up per line item. Only accepted line items are included in the final 'Contract Proposal' report. Un-accepted items are retained in the system for future reference. The system also allows for a preliminary agreement to be generated, once accepted all further client requests leading up to the building contract are processed through the 'Pre-Contract Variations' module.

Quotes can be broken down into the following customisable sections:

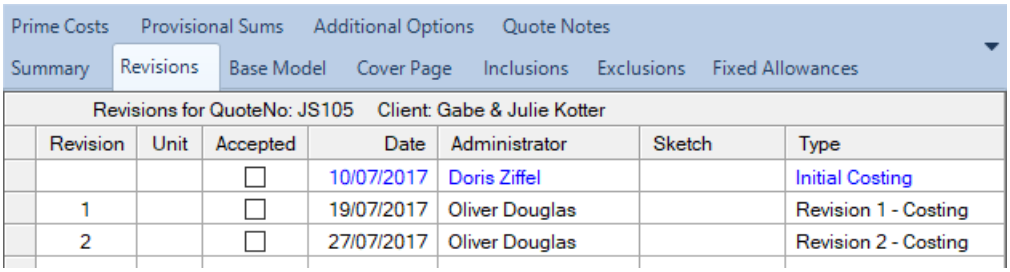
- 'Inclusions' – notes only
- 'Exclusions' – notes only
- 'Fixed Allowances'
- 'Prime Costs'
- 'Provisional Sums'
- 'Promotions'
- 'Additional Options' – available options not included in the quoted total price



Key Modules & Features (cont.)

- Quotations - Revisions

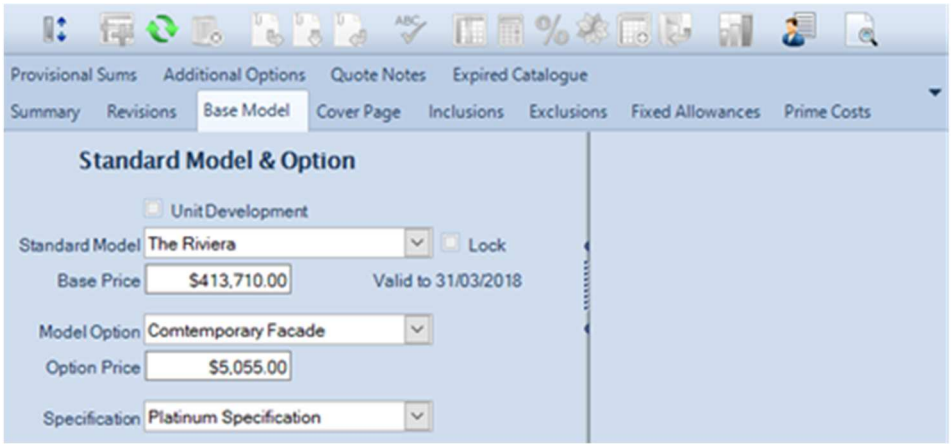
The 'Quotations' revision tab enables the quote to be separated into 'Initial Costing' and provides the capacity to generate multiple revisions in order to keep a timeline on client meetings and requests.



Revision	Unit	Accepted	Date	Administrator	Sketch	Type
		☐	10/07/2017	Doris Ziffel		Initial Costing
1		☐	19/07/2017	Oliver Douglas		Revision 1 - Costing
2		☐	27/07/2017	Oliver Douglas		Revision 2 - Costing

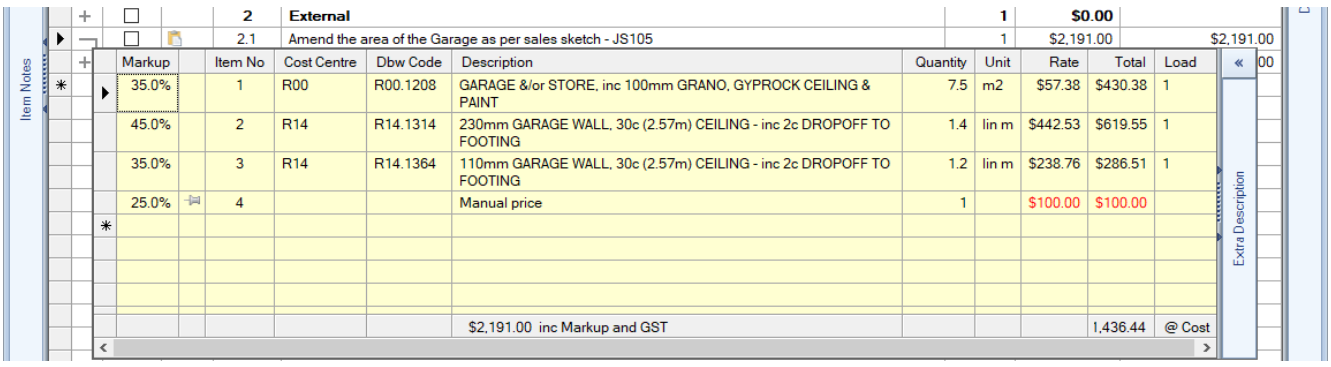
- Quotations – Base Model

The 'Quotations' base model tab allows the sales estimator to select a base model and model option from a library of standard models.



- Quotations – Build-Up

The 'Quotations' build-up section allows sales estimators to price individual line items using the builders price from the Databuild catalogue. A default mark-up is set up in the system and can be overridden on a line by line basis. The total build-up price is rounded up to whole dollars.

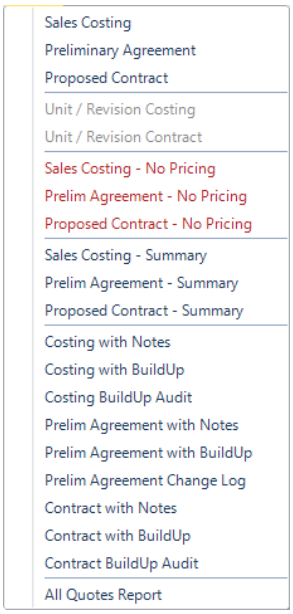


Markup	Item No	Cost Centre	Dbw Code	Description	Quantity	Unit	Rate	Total	Load
35.0%	1	R00	R00.1208	GARAGE &/or STORE, inc 100mm GRANO, GYPROCK CEILING & PAINT	7.5	m2	$57.38	$430.38	1
45.0%	2	R14	R14.1314	230mm GARAGE WALL, 30c (2.57m) CEILING - inc 2c DROPOFF TO FOOTING	1.4	lin m	$442.53	$619.55	1
35.0%	3	R14	R14.1364	110mm GARAGE WALL, 30c (2.57m) CEILING - inc 2c DROPOFF TO FOOTING	1.2	lin m	$238.76	$286.51	1
25.0%	4			Manual price	1		$100.00	$100.00	

Key Modules & Features (cont.)

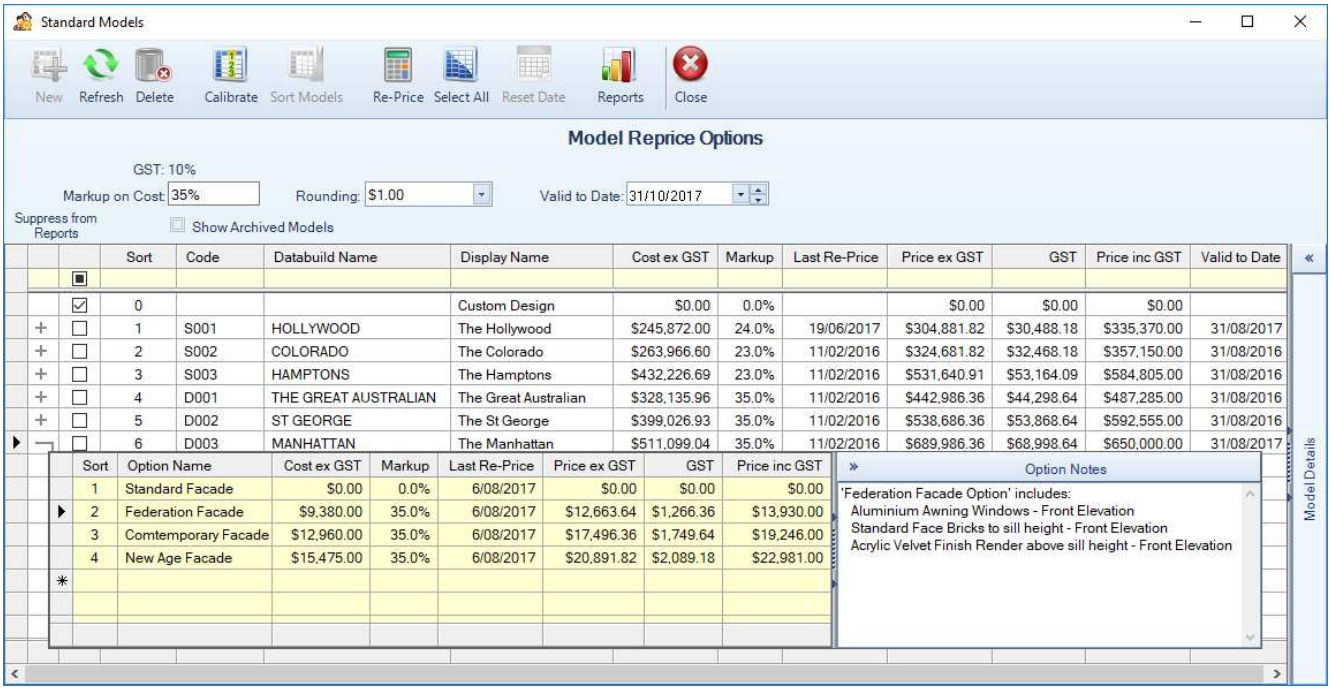
- Quotations - Reports

  The system has a number of built-in reports.



- Quotations – Standard Models & Model Options

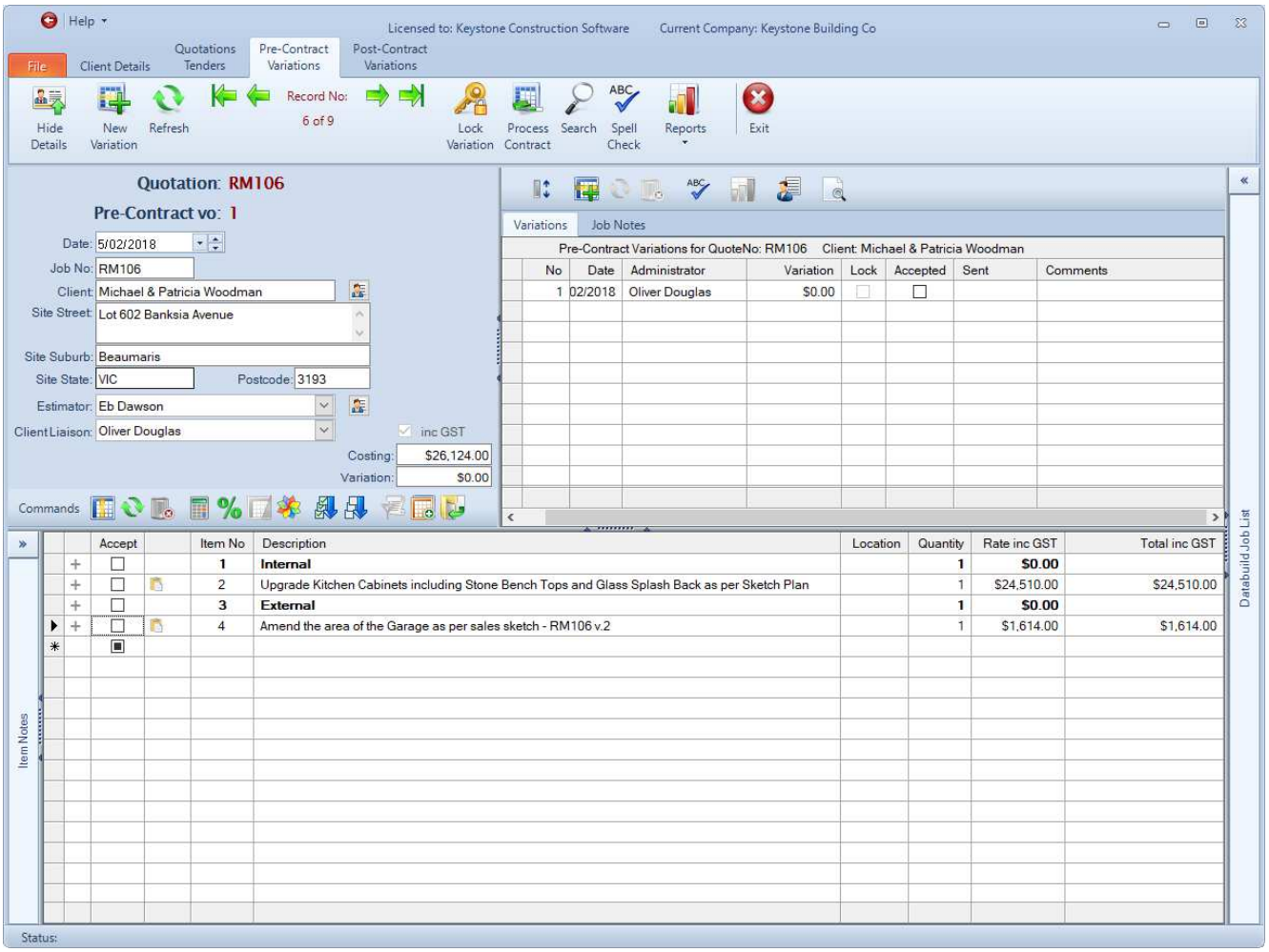
  The 'Standard Models' form looks up the builders cost from Databuild and can then apply the builder's mark-up to control the sales price. The sales price 'Valid to Date' can also be applied in this module.



Key Modules & Features (cont.)

- Pre-Contract Variations - Main

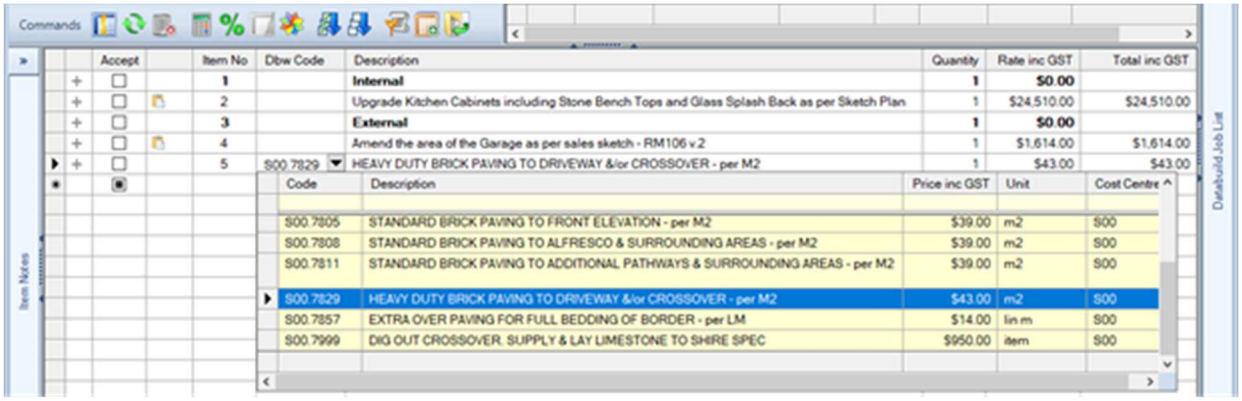
The 'Pre-Contract Variations' module keeps track of all pre-contract costings/variations issued after the 'Preliminary Agreement' is accepted. Each costing/variation allows for multiple line items, this enables the system to group items on an individual costing/variation document based on pre-start meetings or phone conversations. Much like the quotes, pre-contract costing/variation requests are raised on an individual line item basis. These can then be costed utilising the Databuild cost centre structure, along with catalogue items and/or recipes, to form a build-up per line item. Only accepted line items are included in the final 'Pre-Contract Variation' report. Un-accepted items are retained in the system for future reference.



Key Modules & Features (cont.)

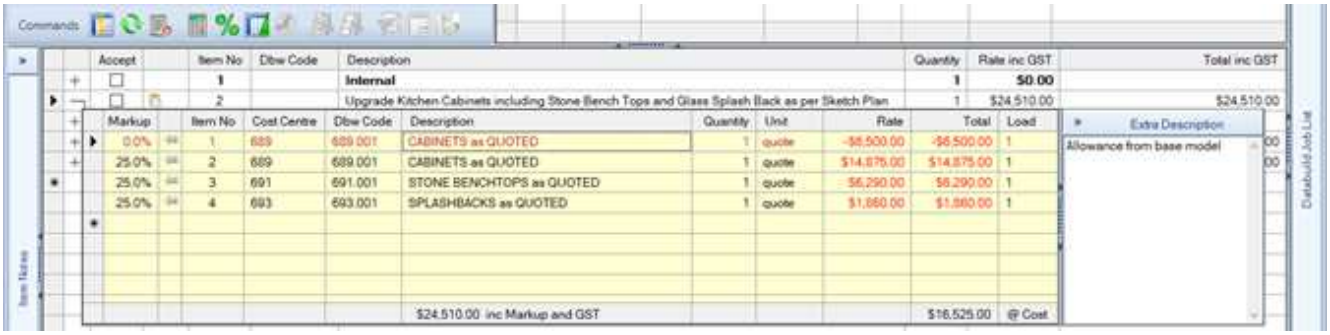
- Pre-Contract Variations – Databuild Codes

  The 'Pre-Contract Variations' Databuild code dropdown allows users to control their own costings using a pre-priced items list maintained by the Databuild catalogue administrator. The items list pricing is inclusive of builder's margin and GST.



- Pre-Contract Variations – Build-Up

  The 'Pre-Contract Variations' build-up section allows sales estimators to price individual line items using the builders price from the Databuild catalogue. A default mark-up is setup in the system and can be overridden on a line by line basis. The total build-up price is rounded up to whole dollars.



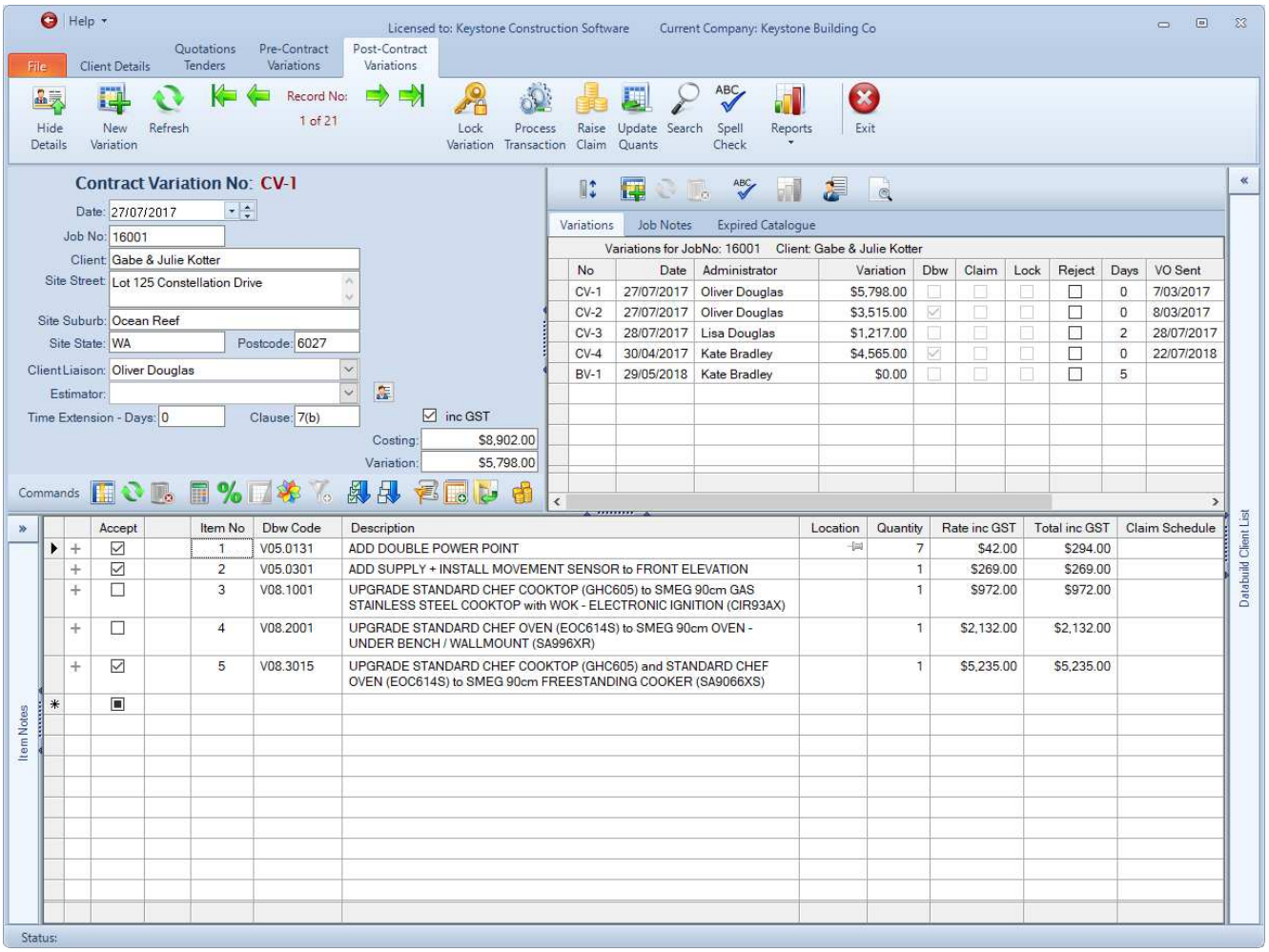
- Pre-Contract Variations - Reports

  The system has a number of built-in reports.

Key Modules & Features (cont.)

- Post-Contract Variations - Main

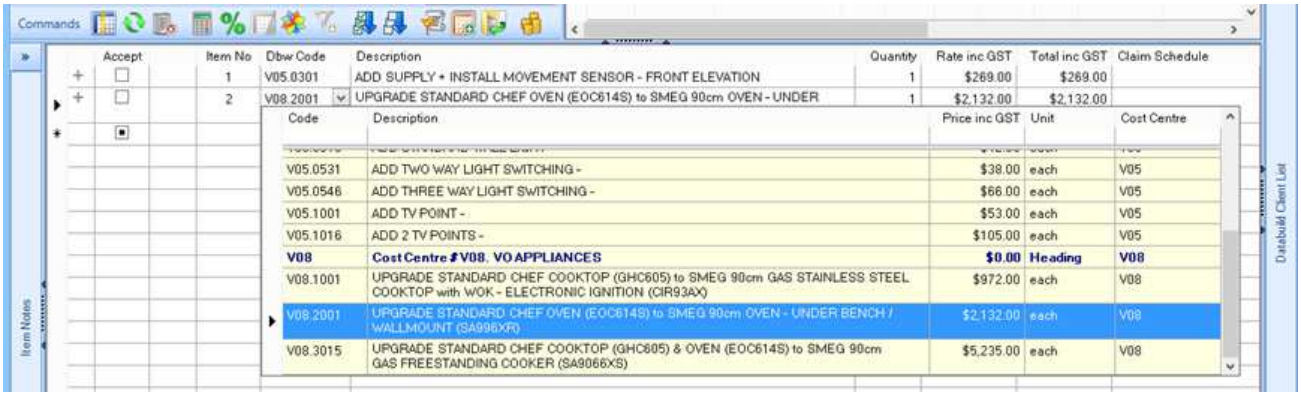
The 'Post-Contract Variations' module keeps track of all post-contract costings/variations issued to the client and can be grouped into 'Contract' and 'Building' stage variations. Each variation allows for multiple line items. This enables the system to group items on an individual variation document based on pre-start meetings or phone conversations. Much like the quotes and pre-contract variations, contract costing/variation requests are raised on an individual line item basis. These can then be costed utilising the Databuild cost centre structure, along with catalogue items and/or recipes, to form a build-up per line item. Only accepted line items are included in the final 'Post-Contract Variation' report. Un-accepted items are retained in the system for future reference.



Key Modules & Features (cont.)

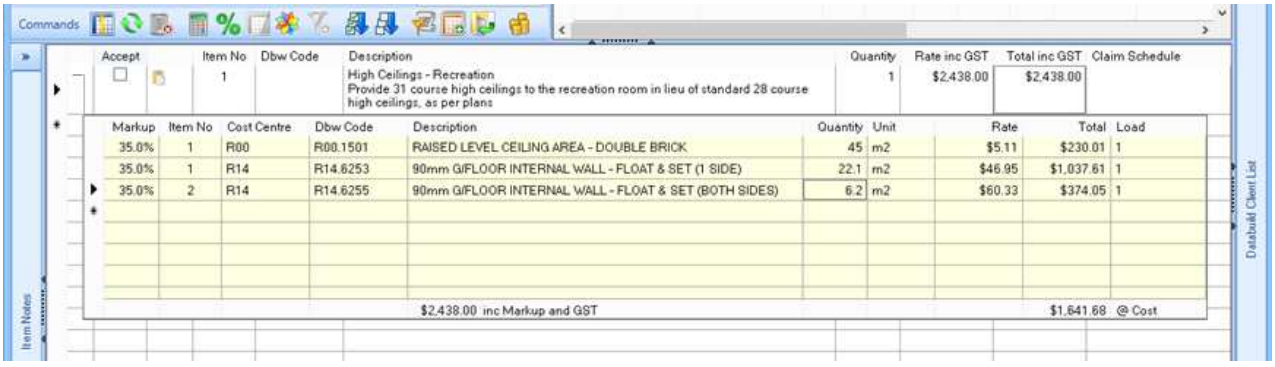
- Post-Contract Variations – Databuild Codes

  The 'Post-Contract Variations' Databuild code dropdown allows users to control their own costings using a pre-priced items list maintained by the Databuild catalogue administrator. The items list pricing is inclusive of builder's margin and GST.



- Post-Contract Variations – Build-Up

  The 'Post-Contract Variations' build-up section allows variation estimators to price individual line items using the builders price from the Databuild catalogue. A default mark-up is setup in the system and can be overridden on a line by line basis. The total build-up price is rounded up to whole dollars.



- Variations - Reports

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