CATProjects
Administration Work Flow

Project Assistant

Module Admin
Manage your price book, add recipes, and customise pick-lists

LEAD MANAGEMENT
Manage prospective projects and clients, see forecasts and statistics. Get follow up reminders.

Set Up Job
In CATPlan

CATPLAN
If using CATPlan import the subcontractor invitee lists and add pricing as it is received. All tender invites, drawing distribution and notice to tenderers from CATPlan.

ESTIMATING
Build up your estimate using price book, recipes, manual entry and subcontractor import. Margin as line item, overall or both.

TENDER OPTIONS
Identify potential options for inclusion in your tender without impacting the base tender

TENDER PRESENTATION
Prepare a professionally presented submission and email or post to the potential client

Project Successful

PURCHASE ORDERS
Create and send orders, track, commit costs and report

STANDING ORDERS
Create and send orders, track, commit costs and report.

STOCK CONTROL
Create and send orders, track, manage stock balances - commit costs and report.

Approve Order If Order Limits Turned On

Store invoice(s) against orders

CREDITOR INVOICES
Process creditor invoices against orders and identify variances to order

INVOICE APPROVAL
Electronic approval, invoices do not need to leave accounts. Two approvals for each invoice.

Electronic approvals are a big step forward in efficiency and make it easier for accounts to track

EXPORT FOR PAYMENT
Set up the progress claim and send a breakdown to the client

SERVICE WORK STREAM
Work stream for small jobs, charge up jobs or planned and reactive maintenance. Job Card driven and includes work scheduling, quotes, work approvals and site specific information.

CREATE AN INVOCE
Create and send invoices for service works and once approved export to accounts

OTHER DOCUMENTS

- Meeting Minutes
- File Notes
- Compliance
- Check Lists
- Concrete Register
- General Filing

CONFIRM A PROJECT
Turn a lead into a live job with auto set up of the budget. Add project foundation info

DAILY SITE DIARY
People on site, weather, visitors, inspections, delays and plant transfers

SITE PHOTO'S
Drag and drop photo's into the gallery

TIME KEEPING
Time entry with budget versus actual. Salary % allocation for salaried staff and approvals before sending to payroll

CONTRACTOR COMMUNICATION
Create, send, track, manage responses and report. Includes an email group notification

SCHEDULE OF RATES
Set up a Schedule of Rates for Scheduled Projects

CLIENT CLAIM SET UP
Set up the progress claim and send a breakdown to the client

PROJECT BUDGET
Add a budget or create it from the estimate. Transfer between codes and lock when finalised

LETTING SCHEDULE
letting schedule based on site start date and lead time

CONTRACTOR VARIATIONS
Variation, track, link to client variations, commit costs

PLANT TRANSFERS
Transfer plant to a job, manage & track location

PLANT RECHARGE
Plant recharge schedules based on location

Link time, orders and subcontractor variations to client variations

CLIENT COMMUNICATION
Create, send, track, manage responses and report.

PROJECT CASH FLOW
Create a Cash Flow Forecast for the Project

PRE LETTING MINUTES
Pre letting minutes editable by project but defaults from the company master

SITE INDUCTIONS
Subcontractors are Pre Inducted On Line before Arrival on Site

PROGRESS CLAIMS
Compliant progress schedules, and auto committed costs

The risk and opportunity process is really powerful and factors into the forecast margin

CONTACTS MASTER
Contacts database for the company

CLIENT PROGRESS CLAIM
CCA compliant progress claim including variations. Auto schedules and reports. Includes Schedule of Rates Style of Progress Claim

CLIENT VARIATIONS
Manage, price, track, auto add to claim, forecast, commit

Subcontractors electronically sign the agreement

PROJECT TEAM
Progressively add the team and use with email, accounts and information

TRADE LETTING
Acceptance Letter, creation of contacts including adding attachments

CONTRACT SET UP
Compliance docs, Insurance, contract and contact information

CLAIM APPROVAL
Electronic approval of claims (two signatories)

RISK & OPPORTUNITY
Factor in contingencies and provisions for forecasting

CREATE AN INVOICE
Create and send a cover invoice (if approved) then export to accounts

INCOMING COMMUNICATION
Links to Client, consultant or subcontractor communication response management on the fly

CONSULTANT COMMUNICATION
written communication with auto schedule and RFI Management.Includes an email group notification

PAYMENT EXPORT
Export claims for payment, track retention

COST TO COMPLETE
Cost to complete forecast against code

MONTHLY REPORT
Project Financial Review and Project Commentary

COMMITTED COSTS
Live job costing which shows all commitments