



# ACUMEN CONSULTING

Business Systems Professionals



**ACUMEN PROFESSIONAL  
SERVICES AUTOMATION**

## We provide a set of tools that will allow you to:

- provide accurate progressive information in the form of a Project Dashboard to Project Managers and Stakeholders to make better decisions at any point in time during the lifecycle of the job
- create budgets to drive project planning based on previous similar work or templates
- track costs of labour, subcontractors and expenses through the Purchase module, Time Sheets and Expense Claims
- automate the billing process through Progress Claims based on different invoicing types (Time & Material, Fixed Fee, Cost + Factor, Recurring Management Fees and more)



**Gives you the tools to handle the variations on a job**



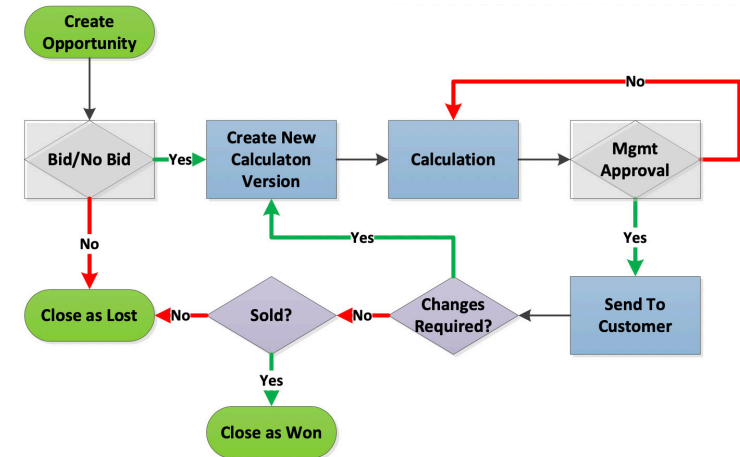
**Has multiple interfaces through a Windows Client, Web Client and Mobile Apps to support all roles from Administrators to Project Managers and technicians in the field**



**Integrates with your suppliers for electronic transfer of order confirmations, stock levels and invoices**

## 1 Opportunity Management

- **Manage the sales process flow** for opportunities through integrated Opportunity Management capabilities. Breaks down the sales flow into stages and generates to-dos for sales representatives
- **Document Management:** Manage External Document such as Drawings, RFPs, Excel Worksheets, etc. by linking them to the opportunity. The documents become available from the opportunity
- **Calculate** expected number of hours per resource group / work type, expected cost for subcontracting, etc. Changes to the calculation can be managed in **Calculation Versions**. Define an hourly rate for internal and external time, or set a fixed price for part or the whole calculation
- **Send** (Hardcopy or Email) a Calculation Version **as a quote** to the customer during the opportunity process
- **Close the opportunity** with a Won or Lost status and a respective reason code, and convert won opportunities into a job
- **Reporting** based on the estimate value, chance of success and estimated closing date allows the service manager to forecast the workload



Example of Opportunity Workflow

## 2 Creating and Managing a Job

- **Jobs are created** in the system either manually via a wizard, via a Job Request or automatically as the result of a won opportunity
- Create the **WBS (Work Breakdown Structure)** as Job Tasks for the job. Set up **Job Templates** to define recurring breakdown structures and apply them easily to new jobs or copy the WBS from an existing Job. This decreases the creation time and the possibility of human errors
- **Budget lines** are linked to each Job Task. They can be created manually, copied from the calculation of a won opportunity, copied from the job template or copied from an existing job in the system
- Manage **Variations** for changes to the budget after the job has started. Budgets and actuals for variations can be separated out for invoicing and reporting purposes
- Link **Price Books** to the Job to define discounts and rates applicable for this job only
- **Document Management**: Manage External Document such as Drawings, Contracts, Excel Worksheets, etc. by linking them to the job
- Keep track of **budget vs. actuals** from the job card, job task overview via Factboxes

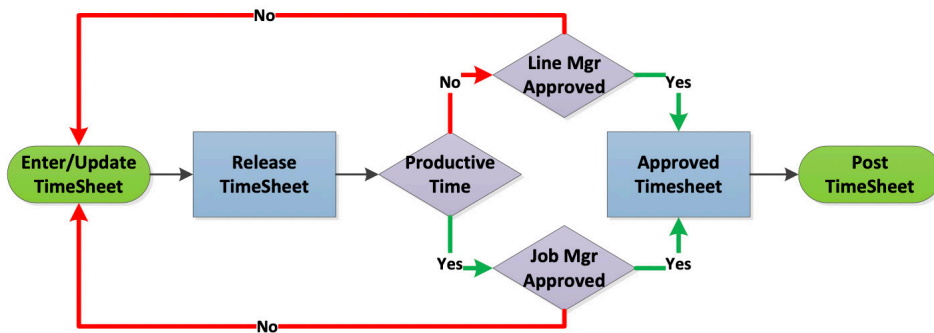
## Subcontractors

## 3

- 3rd party involvement can be managed through resources and purchase orders
- Setting up a subcontractor as **resource** allows the planner to schedule the work
- The actual cost of the subcontracting is allocated to the job via **purchase invoices**

## 4 Timesheets

- Internal staff allocate time to a worksheet via **Time Sheets**
- **Mobile support** for time sheets and approvals via Web Client, or the Universal App on a tablet or a phone
- **Approval Workflow** which differs depending if it is productive or non-productive time
- Set up Time Codes for the different **Overhead and Leave options** such as Admin, Training, Annual Leave, Sick Leave...



## Expenses

## 5

- **Ad hoc costs** incurred and paid for by staff can be claimed
- Different **Expense types** are supported. Expenses which are linked to the execution of a Job will be allocated as Actual Cost to that job

## 6 WIP Report, Progress Claims and Invoicing

- **WIP Reports** handle transfer of cost to another job, prebilling, value charging, % of completion, and more per Project Manager
- **Progress Claims** per Customer are created from the WIP reports. The Progress Claim can be sent to the customer for approval, before creating the sales invoice
- Claims are based on different **invoicing types** (Time & Material, Fixed Fee, Cost + Factor, Recurring Management Fees)
- **Variations** can follow the invoice type of the Base contract or have their own processing

### PROGRESS CLAIM REPORT

Claim No	Claim	From	To	Retentions
1		1/1/2015	31/1/2015	10.05 %

To: Auckland Postmaster  
Address: 10 Drummond Street  
Contact: Auckland Postmaster

Contact: Linda Martin  
Project: Level 2 - Refurbishment  
Project Ref: J00010

PO No: THIS IS A PAYMENT CLAIM UNDER THE CONSTRUCTION CONTRACTS ACT 2002

Item	Description	Total		Previously Claimed		Current Claim		Total Claimed	
		\$	%	\$	%	\$	%	\$	%
190	L1 - Invoicing	120,000			20%	23,400	20%	23,400	
290	L2 - Invoicing	38,250		9,750	25%	9,750	25%	9,750	
Base Contract Value		158,250			21%	33,150	21%	33,150	
Variations Submitted (Schedule Attached)		44,350			43%	18,875	43%	18,875	
<b>Total Value of Contract Submitted</b>		<b>202,600</b>			<b>26%</b>	<b>52,025</b>	<b>26%</b>	<b>52,025</b>	
Retentions				5,203					

This Months Claim	\$	52,025
Less Retention Deducted This Month	\$	-5,203
<b>Total Claim for This Period</b>	<b>\$</b>	<b>46,823</b>

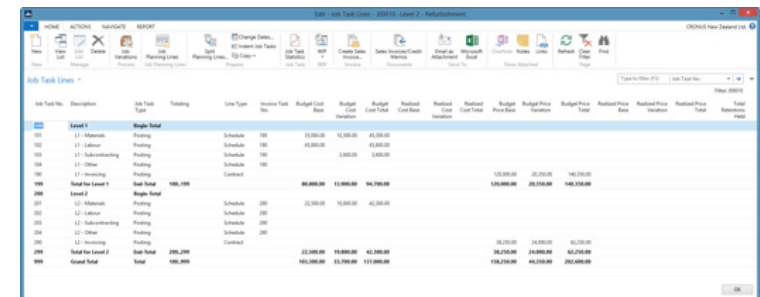
Payment Due - 20/01/15



## 7

## Reporting

- To manage your projects more effectively and with greater flexibility to run accurate reports in real-time enabling better decisions
- Report actuals to budget on different dimensions such as job, office, region, client type, sector...
- Report actuals to budget on resource level for chargeable work, overhead and leave



Job Task No	Description	Job Task Type	Timing	Line Type	Invoice Task No	Budget Cost Base	Budget Cost Base Variation	Budget Cost Base	Budget Cost Base Variation	Budget Price Base	Budget Price Base Variation	Budget Price Base	Budget Price Base Variation	Total Amount
<b>Level 1</b>														
<b>Single Total</b>														
101	L1 - Materials	Profiting	Schedule	100		50,000.00	50,000.00	40,000.00						
102	L1 - Labour	Profiting	Schedule	100		40,000.00	40,000.00	40,000.00						
103	L1 - Subcontracting	Profiting	Schedule	100		1,000.00	1,000.00							
104	L1 - Other	Profiting	Schedule	100										
105	L1 - Invoicing	Profiting	Contract							120,000.00	20,000.00	140,000.00		
106	<b>Total for Level 1</b>	<b>Cost Total</b>				<b>91,000.00</b>	<b>11,000.00</b>	<b>94,000.00</b>		<b>120,000.00</b>	<b>20,000.00</b>	<b>140,000.00</b>		
<b>Level 2</b>														
<b>Single Total</b>														
201	L2 - Materials	Profiting	Schedule	200		10,000.00	10,000.00	42,000.00						
202	L2 - Labour	Profiting	Schedule	200										
203	L2 - Subcontracting	Profiting	Schedule	200										
204	L2 - Other	Profiting	Schedule	200										
205	L2 - Invoicing	Profiting	Contract							38,250.00	9,750.00	48,000.00		
206	<b>Total for Level 2</b>	<b>Cost Total</b>				<b>10,000.00</b>	<b>10,000.00</b>	<b>42,000.00</b>		<b>38,250.00</b>	<b>9,750.00</b>	<b>48,000.00</b>		
207	<b>Grand Total</b>	<b>Total</b>				<b>101,000.00</b>	<b>21,000.00</b>	<b>136,000.00</b>		<b>158,250.00</b>	<b>29,750.00</b>	<b>188,000.00</b>		



# ACUMEN CONSULTING

Business Systems Professionals

**Contact us for more information**

---

[sales@acumenconsulting.co.nz](mailto:sales@acumenconsulting.co.nz)

Auckland | +64 (0)9 526 1400

Wellington | +64 (0)4 461 7305