SMARTEBUILD

The User Manual

Estimating and running building jobs — from the drawings on your desk to the last defect signed off.

I Start here

II Set up your company

III Estimating

IV Winning the work

V Running the job

VI Beyond the desktop

40 chapters · 163 articles · 122 illustrations

Revision 2 · 2 October 2026 at 16:13

Edition of 2 October 2026 · smartebuild.com.au

How to use this book

This is the whole of the SmarteBuild help centre in one volume. You can read it front to back, but almost nobody does — and it is built so you do not have to.

> **If you are new**
> Read Part I, then the one part that matches what you are doing this week. Six chapters in, you will know where everything lives.
>
> **If you are looking for one answer**
> Use the contents. Every chapter is a screen in SmarteBuild and every numbered section is one job you might be trying to do.
>
> **The cross-references are live**
> Anything underlined in blue jumps to that page of this book, so following a thread does not mean flipping back and forth.
>
> **Where you see a teal BUILDER PLAN tag**
> That feature is on the Builder plan. Everything untagged is on every plan.

The online version at **help.smartebuild.com.au** is the same text, kept current as the software changes. When the two disagree, the website is right — check the edition date on the cover of this one.

Contents

PART I
Start here
1 What SmarteBuild does
2 Company, project, estimate
3 Your first project, end to end
4 Finding your way around
5 The Dashboard
6 What is in each plan

PART II
Set up your company
7 Set up your company
8 Running several companies
9 Users and access
9.1 Adding users
9.2 Roles and access
9.3 Module permissions
9.4 Email settings
9.5 Your profile
10 Subscription and billing
10.1 The Admin panel
10.2 Subscribing and changing plan
10.3 Invoices, your card, pausing and cancelling
10.4 Company details, logo and bank accounts
11 Suppliers
11.1 Why suppliers matter
11.2 Adding and editing suppliers
11.3 Importing, merging and deleting
12 Price lists
12.1 What a price list is for
12.2 Building a price list
12.3 Cost codes and structure
12.4 Products
12.5 Keeping rates current

PART III
Estimating
13 Estimating
14 Projects and estimates
14.1 Projects and estimates
14.2 Creating a project
14.3 Estimates and templates
14.4 Project details and permissions
14.5 Markups
14.6 Clients
14.7 Contract stages
14.8 Organising your projects
14.9 Archiving and deleting
15 Documents
15.1 The document register
15.2 Uploading and organising
15.3 Versions and revisions
15.4 Auto-attaching to bids and orders
15.5 Sharing documents
15.6 Attaching files to orders, tenders and expenses
15.7 The drawing register
15.8 Transmittals
15.9 RFIs
15.10 Restricted folders, upload links and activity
16 Take-Off
16.1 What Take-Off is, and your first measurement
16.2 Setting the scale
16.3 The measurement tools
16.4 Take-off fields and the BOQ
16.5 Drawings, revisions and export
16.6 Keyboard reference and troubleshooting
17 Cost codes
17.1 What cost codes are for
17.2 Building your structure
17.3 Work Breakdown Structures
17.4 Reusing a structure
17.5 The money on one cost code
18 The Bill of Quantities
18.1 The Bill of Quantities explained
18.2 Adding items
18.3 Getting a quantity
18.4 Fields, items, formulas and calc sheets
18.5 Measurements
18.6 Formula fields

18.7 Assemblies
18.8 Prices, markups and GST
18.9 Suppliers and products
18.10 Organising items
18.11 Bulk operations
18.12 Specification
18.13 Comparing estimates
18.14 Reports
18.15 BOQ settings

PART IV
Winning the work

19 Winning the work
20 Leads
20.1 Tracking leads
20.2 Working the board
20.3 Converting to a quote
20.4 The website enquiry form
21 Tenders and quotes
21.1 How tendering works
21.2 The tender list
21.3 Building a tender package
21.4 Inviting subcontractors
21.5 Sending and tracking
21.6 What subcontractors see
21.7 Comparing bids and awarding
22 Quotes received
22.1 Recording a quote
22.2 Bringing a quote into the BOQ

PART V
Running the job

23 Running the job
24 Purchase orders
24.1 How purchase orders work
24.2 Raising an order
24.3 Order details
24.4 Sending an order
24.5 Voiding, trashing and deleting
24.6 Committed vs actual cost
24.7 The orders list
25 Variations
25.1 When to raise a variation
25.2 Creating a variation
25.3 Getting client approval
25.4 How variations affect the job
25.5 The variations list
25.6 Tracking a variation
25.7 The client portal
25.8 Applying a variation to the BOQ
26 Progress claims
26.1 How progress claims work
26.2 Raising a claim
26.3 Claiming by percentage complete
26.4 Including variations
26.5 Issuing a claim
26.6 Tracking payment
27 Expenses
27.1 How expenses work
27.2 Recording an invoice
27.3 Matching to an order
27.4 Cost to date against budget
27.5 The expenses list
28 Colour selection
28.1 What the selections schedule is for
28.2 Building the schedule
28.3 Running a selection with the client
28.4 Columns and printing
28.5 Sharing the schedule with the client
28.6 Updating the estimate and the orders
29 Schedule and booking
29.1 The seven views
29.2 Tasks
29.3 Building a schedule
29.4 The Gantt
29.5 Resources and cost
29.6 Call-up sheets
29.7 Bookings and confirmations
29.8 Procurement
29.9 Calendar and delays
29.10 Cash flow
29.11 Reports and printing
30 Site diary
30.1 What the site diary is for
30.2 Filling in a day
30.3 Delays and issues
30.4 The site diary on the phone

31 Timesheets
31.1 How timesheets work
31.2 The week
31.3 Approving hours and labour cost
31.4 Timesheets on the phone
32 Earned value
32.1 Is the job ahead or behind, under or over?
33 Checklists and safety
33.1 Checklists and safety
33.2 Templates
33.3 Runs and sign-off
33.4 Safety incidents
34 Defects
34.1 Logging defects
34.2 Tracking to close-out
34.3 Sending defects to a supplier
34.4 Reports and handover
35 Messages
35.1 Messages
35.2 Channels, groups and files
35.3 Messages on the phone
36 The client portal
36.1 Client portal
36.2 Sharing documents, photos and selections

PART VI
Beyond the desktop

37 Beyond the desktop
38 The mobile app
38.1 Installing and signing in
38.2 What you can do on site
38.3 Defects on site
38.4 Checklists and incidents
38.5 Dictation
38.6 Working with poor reception
39 Integrations
39.1 Xero
39.2 Office 365 and Outlook
39.3 Gmail and Google
40 Reports
40.1 The report library
40.2 Exporting and sharing

PART I

Start here

What SmarteBuild is, how it is put together, and your first job end to end.

1 What SmarteBuild does
2 Company, project, estimate
3 Your first project, end to end
4 Finding your way around
5 The Dashboard
6 What is in each plan

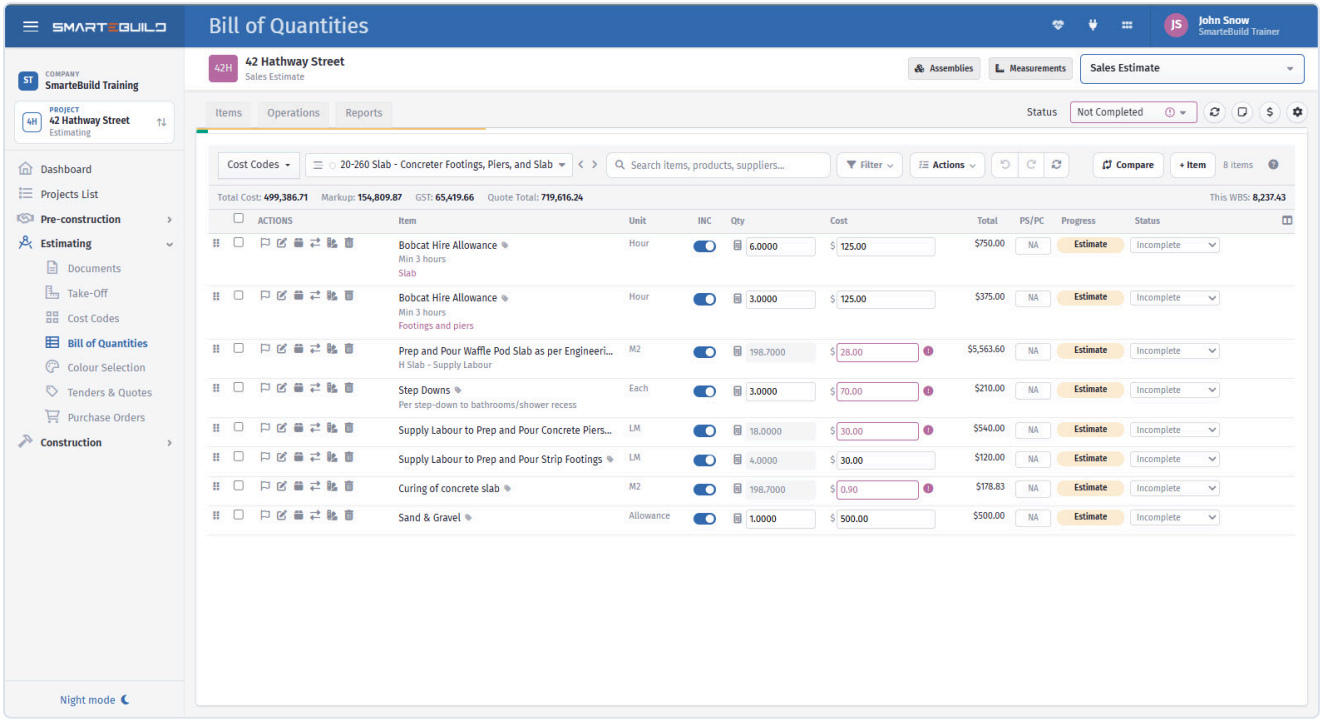
CHAPTER 1

What SmarteBuild does

A plain-English tour of what SmarteBuild is for, which part of it you will spend your time in, and how the pieces connect.

SmarteBuild is estimating and project management software for Australian builders. It takes a job from a set of drawings all the way through to a finished, claimed and reconciled contract, without the numbers being re-typed at any point along the way.

That last part is the whole idea. Most builders run an estimate in a spreadsheet, a schedule in something else, orders on a pad and claims in their accounting package. Every boundary between those is a place for a number to go stale. SmarteBuild keeps one set of numbers and lets each part of the job read from it.



One job, from the estimate through to handover, in one place.

The shape of a job

Work moves through SmarteBuild in four stages. You will recognise them, because they are the stages of any building job.

1. Estimate it

Load the drawings, measure the quantities off them, and build a priced Bill of Quantities.

- **Documents** holds the drawing set.
- **Take-Off** measures quantities straight off the PDFs.
- **Cost Codes** is the structure you cost against — your trade breakdown.
- **Bill of Quantities** is the priced estimate itself.

- **Price Lists** and **Suppliers** feed it the rates.

2. Win it

Put the work out to your subcontractors, compare what comes back, and let the winning prices flow into the estimate.

- **Tenders & Quotes** builds packages and sends them out.
- **Quotes Received** records prices that arrive outside a formal tender.

3. Buy it

Turn the estimate into commitments — orders to suppliers and subcontractors, with the committed cost tracked against what you allowed.

- **Purchase Orders** raises and issues orders.
- **Expenses** records the invoices that come back against them.

4. Build it

Run the job: schedule it, book the trades, handle the changes, claim the money, and close out the defects.

- **Schedule & Booking** covers tasks, the Gantt, the calendar, call-ups and cash flow.
- **Variations** handles changes to the contract.
- **Progress Claims** gets you paid.
- **Colour Selection** runs the client's selections.
- **Defects** tracks the punch list.
- **Feeds** keeps the project conversation in one place.

What connects them

Two things do most of the connecting, and they are worth understanding early.

The Bill of Quantities is the spine. Almost everything downstream reads from it. An order is raised against BOQ items. A claim is made against what those items are worth. A variation adds items to it. If you understand the BOQ, the rest of the system stops being surprising.

Take-off fields carry quantities. When a measurement off a drawing feeds a BOQ item, changing the measurement changes the item — and everything that reads from the item. This is what stops a late drawing revision turning into an afternoon of re-typing.

Which parts you will actually use

That depends on your plan, and on your job.

- **Estimators** live in Documents, Take-Off, Cost Codes and the BOQ, and finish in Tenders.
- **Builders and project managers** spend their time in Purchase Orders, Schedule, Variations and Progress Claims.
- **Contract administrators** move between Expenses, Claims and Variations.

Nobody uses all of it every day. See What is in each plan for what your subscription includes.

Next

- Company, project, estimate — the one idea that explains where everything lives
- Your first project, end to end — a worked tutorial

CHAPTER 2

Company, project, estimate

The three-level hierarchy that explains where everything in SmarteBuild lives, and why you would ever have more than one estimate on a job.

Almost every "where has that gone?" question in SmarteBuild is really a question about this hierarchy. It is three levels deep, and once it clicks, the whole system becomes predictable.

The three levels

Company → Project → Estimate

Company

Your business. There is one of these, and it holds everything that is true across all your jobs:

- your users and what they are allowed to do
- your suppliers
- your price lists
- your company details and branding
- your subscription plan

Set these up once. Every project you ever create draws on them.

Project

One job. `14 Marine Parade`, `Woolworths Fitout Stage 2`, `Lot 118 Aspen Estate`.

A project holds the things that are true about the job regardless of how you price it: the client, the site, the contract stages, the project team and their permissions, and the documents.

Estimate

One priced version of that job.

This is the level most people are surprised by, because most estimating tools stop at the job. The estimate is where the numbers live — the cost codes, the Bill of Quantities, the take-off, the markups.

Why a project can have several estimates

Because you routinely price the same job more than once, and you need to keep the versions apart.

Situation	How estimates help
Client asks for a cheaper option	Duplicate the estimate, swap the finishes, compare the two
Tender revision issued	Duplicate, update to the new drawings, keep the original for the record
Two build methods	One estimate framed, one estimate steel, priced side by side
Budget vs contract	An early budget estimate kept alongside the one you signed

An estimate is cheap to duplicate and keeps its own take-off, its own BOQ and its own markups. What it shares with its siblings is the project around it — same client, same documents, same contract stages.

> **Duplicating an estimate does not copy the take-off** — Duplicating carries the BOQ structure across, but measurements stay with the estimate they were made in. Take-off is tied to the estimate's own fields and drawings.

What lives where

When you cannot find something, work down the levels.

You are looking for	It lives at
A supplier, a price list, a user	**Company**
A drawing, the client, contract stages, permissions	**Project**
The BOQ, cost codes, take-off, markups	**Estimate**
An order, a claim, a variation	**Estimate** — they are raised against BOQ items
The schedule, defects, the project feed	**Project**

How this shows up on screen

The module menu down the left changes depending on where you are. Modules that need an estimate — Bill of Quantities, Take-Off, Cost Codes — will ask you to pick one before they will open. That is not a fault; it is the hierarchy asking which version of the job you mean.

If a module opens straight to a *"Select a Project to open"* screen, you are being asked for the project level. If it then asks you to *"Select an Estimate"*, you are being asked for the level below.

Next

- Your first project, end to end — build all three levels for a real job
- Finding your way around — the menus, filters and list views

CHAPTER 3

Your first project, end to end

A complete worked tutorial - create a project, take off the quantities, build a priced bill, and see where the numbers go next.

This tutorial builds one job from an empty screen to a priced Bill of Quantities. It takes about forty minutes the first time. Everything in it is real work you would do on a live estimate — nothing here is a toy example you throw away afterwards.

We will price a small residential extension: `18 Beach Road – Rear Extension`, a single-storey addition on a slab, for a client called Hendricks.

> **There is already a sample project in your account** — A new account starts with *SAMPLE - 24 Example Street, Springfield*: a double-storey home with a priced estimate on it, including formula quantities and contract stages. Open it from **Projects List** to see how a finished job is put together, change anything you like, and delete it when you are ready to start for real. Nothing else depends on it. The **Get Started** page you see after signing in links to it.

> **What you need first** — Your company needs at least one supplier and a price list with a few rates in it. If you have not set those up, do Set up your company first — it takes ten minutes and this tutorial will make more sense afterwards.

Step 1 — Create the project

Open **Projects List** and choose **New** → **Project**.

Field	What to enter
Project name	`18 Beach Road – Rear Extension`
Client	`Hendricks` — create the client if it does not exist
Address	The site address
Status	`Estimating`

Save. You now have the middle level of the hierarchy — the job itself.

Step 2 — Create an estimate

A project holds no prices. The prices live in an estimate.

From **Project Details**, choose **New** → **Estimate** and name it `Tender – Rev A`.

Naming the estimate after what it *is* pays off later. When the client asks for a cheaper option and you duplicate this into `Tender – Rev B (reduced spec)`, you will be glad neither is called "Estimate 1".

Step 3 — Upload the drawings

Open **Documents** and upload the architect's PDF set. Give it a name that matches what the architect called it — `A-101 Floor Plan Rev B`, not `plans final final`.

Documents is also where drawing revisions are managed, so when Rev C arrives it supersedes Rev B here rather than sitting beside it as another file.

Step 4 — Set up your cost codes

Open **Cost Codes**. This is the trade breakdown you will cost against — `Preliminaries`, `Concrete`, `Framing`, `Roofing`, `Brickwork`, `Carpentry`, `Plumbing`, `Electrical`, and so on.

Most builders use the same breakdown on every job. Set it up once here and reuse it by duplicating an estimate, or by loading a standard structure.

Step 5 — Take off the quantities

Open **Take-Off** and open your floor plan.

Set the page scale, create a take-off field for each quantity you need, and measure. For this extension you might create:

Field	Unit	Height / depth	Measure with
`Slab area`	M2	—	Area
`Slab concrete`	M3	Depth `0.1`	Area
`External wall`	M2	Height `2.7`	Polyline
`Internal doors`	Each	—	Count

The full walkthrough is in What Take-Off is, and your first measurement.

Step 6 — Build the Bill of Quantities

Open **Bill of Quantities**. Add an item under each cost code for the work it covers — concrete supply and place, mesh, formwork, brickwork, and so on.

For each item you need three things: a description, a rate, and a quantity.

- **Description** — what the item is. Pull it from a price list where you can, so it is worded the same on every job.
- **Rate** — from your price list, from a supplier's product, or typed in.
- **Quantity** — this is the interesting one.

Getting the quantity

There are four ways, and choosing the right one is most of the skill.

Method	Use it when
Manual entry	A one-off number that comes from nowhere else
Field	The quantity was measured in Take-Off
Calc sheet	You need to show a small calculation, dimension-book style
Formula	The quantity derives from other quantities

For the concrete item, open **Calculate Quantity**, choose the **Fields** tab, and pick `Slab concrete`. For the mesh, pick `Slab area`. For the brickwork, pick `External wall`.

Step 7 — Apply your markup

Back in **Project Details**, set the markups for this estimate — overheads, margin, and any contingency.

The BOQ shows cost; the markups turn cost into the price you quote. Keeping them separate means you can see your margin at a glance and change it without touching a single rate.

Step 8 — Check the total

Open the **Projects List** and find your project. The estimate metrics show you the cost, the markup, the derived contract sum and where the margin comes from.

That is a complete estimate.

What happens next

From here the job goes one of two ways, depending on your plan.

If you are tendering the work out, go to **Tenders & Quotes**, build packages from your BOQ items, and send them to your subcontractors. Prices that come back can be brought into the bill.

If you have won the job, the BOQ becomes the spine of everything that follows:

- **Purchase Orders** are raised against BOQ items, and track committed cost
- **Expenses** records the invoices that come back
- **Progress Claims** claim against what those items are worth
- **Variations** add to the bill when the job changes
- **Schedule & Booking** plans the work and books the trades

Prove the round trip

Before you move on, do this one thing. It is the single best demonstration of why the system is put together the way it is.

1. Go back to **Take-Off** and open your floor plan.
2. Select the slab area and drag one corner out — say the client has added a metre to the alfresco.
3. Go to the **Bill of Quantities**.

The concrete, the mesh and the formwork have all already changed. You did not recalculate anything, and you did not have to remember which items depended on that measurement.

That is the point of the whole thing.

CHAPTER 4

Finding your way around

The module menu, the top bar, project filters and list views - what each part of the SmarteBuild screen is for.

Every page in SmarteBuild is laid out the same way. Learn it once and you will never be lost in a module you have not opened before.

Company and project, at the top of the menu

The two things every page needs to know sit at the top of the left-hand menu.

Company is the first row. Most people belong to one company, and then the row just names it. If you belong to several, click it and pick the one to work in.

Project is the card under it: the project you are in, its status, and how many defects are open on it. Click the card and a list opens:

- **Find a project** at the top narrows the list as you type.
- **Recent** is the three projects you opened last.
- **All projects** is everything you can see, with archived ones greyed.
- **Filter by folder** at the foot opens the project filters, and **All projects** takes you to the Projects List.

Pick a project and the page reloads on it. Escape, or a click anywhere else, closes the list without changing anything.

The module menu

The first entry, **Dashboard**, is where you land after signing in: your recently opened projects, this week across every job, the next claim dates and a handful of charts. See The Dashboard.

Down the left. Company-level entries sit at the top: Dashboard and Projects List. Below them the modules are grouped in the order you meet them on a job, and each group opens and closes with a click:

Group	Modules
Pre-construction	Leads, Project Details
Estimating	Documents, Take-Off, Cost Codes, Bill of Quantities, Colour Selection, Tenders & Quotes, Purchase Orders
Construction	Variations, Progress Claims, Expenses, Schedule & Booking, Site Diary, Timesheets, Checklists & Safety, Defects, Messages

The group holding the page you are on is open when the page loads; opening another group folds it, so only one is open at a time and the menu stays short. A folded group shows a count when something inside it needs you: unread messages, or open defects on the project.

Some of these may be greyed out or carry a padlock — see What is in each plan.

The **hamburger button** at the top left folds the menu to a narrow strip of icons when you need the width, which is worth knowing on a wide Bill of Quantities. The company and project become two small chips at the top of the strip; click a chip to open its list, or hover a group icon to see its modules.

The top bar

Across the top, from left to right:

- **The page title**, which tells you which project and estimate you are in. Check it when a number looks wrong — being in the wrong estimate is the most common explanation.
- **Activities** (the pulse icon) — notifications and recent activity across your projects.
- **Integrations** — Xero settings, and connecting Outlook or Office 365.
- **Your account menu** — your profile, the Help Centre, the **Admin panel** if you are an administrator, and Logout.

The Admin panel

Your plan, your invoices and your card live in a **separate site**, not in the module menu — which is why people hunt for them. It opens from your account menu, and only administrators can get in.

That is where you change plan, update the card, download invoices and cancel. See The Admin panel.

Choosing a project and an estimate

Most modules need to know which job you mean before they can show you anything. Open one without a project selected and you get a **"Select a Project to open"** screen.

Modules that work at the estimate level — Bill of Quantities, Take-Off, Cost Codes — will then ask you to **Select an Estimate**. If that surprises you, read Company, project, estimate; it is the hierarchy asking which priced version of the job you want.

Once you have chosen, SmarteBuild remembers. Moving between modules keeps you in the same project and estimate until you change them.

Project filters

The **Project Filters** panel narrows the project list down to the jobs you care about — by status, by client, by who is on the team, by date. It is worth setting up properly if you carry more than a dozen live jobs, because it applies everywhere the project picker appears.

List views

Several modules come in two flavours: a **detail view** for working on one record, and a **list view** for seeing everything at once.

Look for the floating **List View** button at the bottom right of a detail page — on Purchase Orders, Progress Claims, Variations, Expenses, Tenders and Quotes. It switches you to a grid of every record in that module, which you can sort, filter, group and export.

Going the other way, clicking a row in a list view opens that record in the detail view.

> **List views are where you find things** — If you are hunting for "that order from March", do not page through the detail view. Switch to the list view, sort by date, and filter. The list views are built for searching; the detail views are built for working.

Column pickers

Some grids let you choose which columns you see — Colour Selection and the Projects list among them. Look for the column or settings icon in the grid header. Your choice is remembered against your login, so it follows you between sessions without affecting anyone else.

The Enter key

Enter means "OK" for whatever you are working in:

- **In a window** (editing a defect, adding an item, a new tender): Enter presses its main button, usually **Save** or **Add**.
- **In a search box**: Enter runs the search.
- **In a row you are editing** in a grid: Enter saves that row.
- **In the project list** at the top of the menu: Enter opens the first project that matches what you typed.
- **In a window that only shows something** (a PDF, a report, a history): Enter closes it.
- **In a box that holds several lines**, Enter starts a new line as usual.

Some buttons always need a click, because they can't be taken back: anything that **deletes or removes**, anything that **sends** (an email, an order, a notice to a supplier or client), **approvals**, **awarding a tender**, and **exports to Xero**. In those windows Enter does nothing, so a stray key press can't send or delete anything.

In Messages, Enter sends your message and Shift+Enter adds a new line.

The same goes for the Admin panel (plan, users, billing) and the sign-up pages. In the Admin panel, pausing your subscription, confirming a plan purchase and granting or removing all permissions always take a click.

Getting help

The **Help Centre** link in your account menu opens this site at the article for the module you are currently in.

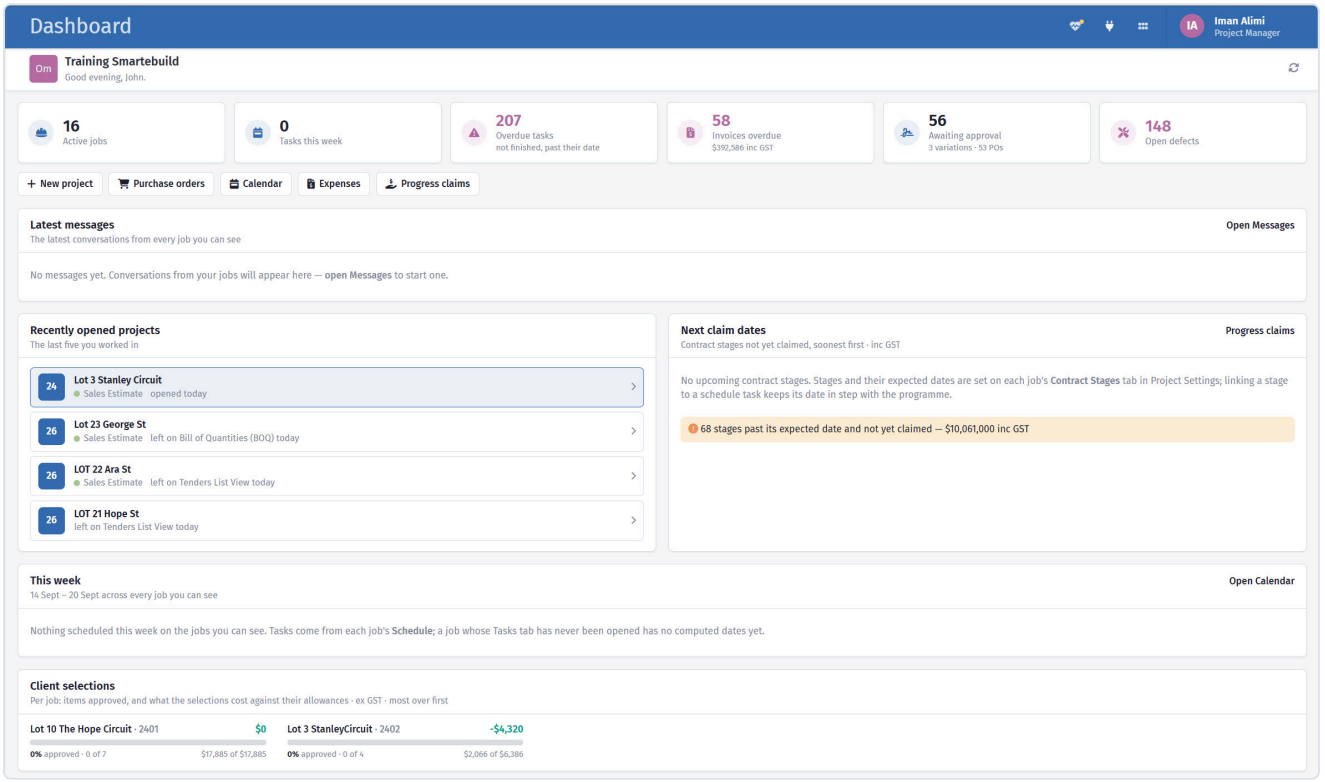
CHAPTER 5

The Dashboard

The page you land on after signing in - your unseen messages, recent projects, this week across every job, the next claim dates, and two charts of where the money is.

The Dashboard is the first thing you see after signing in, and the first entry in the module menu. It is the one page in SmarteBuild that is not about a single project: it reads every job you have access to and puts the week ahead, the money coming in and the money going out on one screen.

Everything on it is a link. Click a project to open it, a claim date to go to that job's Progress Claims, a task to open the Calendar, an invoice to open it in Expenses.



The dashboard is the first thing you see after signing in.

What each part shows

The figures across the top

Six counters, each of which takes you to the page where the number gets dealt with.

- **Active jobs** — estimates you can see that are not archived and not marked Finished.
- **Tasks this week** — schedule tasks running on any day of the current week, on every job. The same count the Calendar shows.
- **Overdue tasks** — tasks past their finish date that are not marked complete.
- **Invoices overdue** — supplier invoices past their due date, with the total including GST. An invoice that Xero reports as paid is not counted.

- **Awaiting approval** — variations the client has not accepted, plus purchase orders that have not been approved.
- **Open defects** — defects not yet marked fixed.

A pink figure is one worth acting on. A quiet week shows six ordinary ones.

Latest messages

Your most recent conversations from every job and every chat you are part of — job chats, client chats from the client portal, group chats and direct messages — with their latest messages, so you can see what is going on without opening Messages.

Conversations are listed with the most recent activity first, whether you have read them or not, so the panel always shows what has been said lately. Each card shows which job the chat belongs to and its newest few messages in the order they were sent; **Show earlier** opens the rest. Messages from a client carry a **Client** tag, your own show as **You**, and anything that @mentions you is highlighted.

What you have not seen stands out. A conversation with unseen messages is outlined, shows how many are waiting, and marks each unseen message with a dot; one you have read says **Seen**. Any conversation with something unseen is always on the list, however long ago it arrived — it cannot drop off the bottom behind newer, already-read chats.

- **Reply** (or **Open chat**) opens the conversation in Messages, where it is marked as read in the usual way.
- **Mark read** marks a conversation as read without leaving the dashboard. It stays on the panel — it just stops being highlighted.

Nothing is marked as read just by appearing here. The unseen number in the heading is the same one Messages shows, and chats you have **muted** are left out of it. A muted chat still appears among your latest conversations; an older one is kept on the list only if someone @mentions you in it — the same rule as notifications on your phone.

The panel keeps itself up to date while the dashboard is open, and refreshes as soon as you come back to it from another tab or page. If you do not have access to Messages, the panel is not shown.

My procurement

Everything **you** look after on the procurement lists of every job you can open, that has to be chosen or ordered by the end of next week - grouped **Overdue**, **This week** and **Next week**, soonest first. You are "looking after" an item when you are its **Who is looking after it** on the job's Procurement tab.

Each line shows the date, what to do (**Choose** when a choice is still to be made, otherwise **Order**), the item, the job, the task it is needed for and the date it has to be on site. Click it to open that item on its job's Procurement tab.

The dates come from each job's schedule, so when a task moves, its items move in or out of this list by themselves. Once an item is ordered - by hand, or because its linked purchase order has been sent - it drops off: there is nothing left for you to do.

Recently opened projects

The last five projects you opened, most recent first, with each job's status and the page you were last on in it. Clicking a project takes you back to that page — the Bill of Quantities, the Purchase Orders, the Schedule

— with the estimate you had selected, not to Project Details. This list is yours: two people in the same company see their own. Archived projects are marked but still listed, because you were working in them.

Next claim dates

The five contract stages coming up soonest across all your jobs that have not yet been claimed in full, with the amount still to claim (including GST).

The date is the stage's expected date. Where a stage is linked to a schedule task, the task's finish date is used instead, so the list moves with the programme. The badge tells you whether the linked task is complete (**Ready**) or how far along it is; a stage with no linked task is always Ready, because there is nothing to wait for.

Below the list, a note counts stages whose expected date has passed without a full claim — money sitting on the table.

This week

Monday to Sunday, every job at once. Each day lists:

- **Tasks** from the schedule — on every day they run, with the days after the first shown faintly. Milestones carry a diamond. Completed tasks are struck through.
- **Supplier invoices** falling due that day, with the amount.
- **Contract stages** expected that day.

Weekends and company non-working days are shaded. When a day has more than six items it shows the first six and a **+ more** button.

Cash forecast

Twelve weeks ahead, laid out like a cash-flow chart in a spreadsheet: dollars up the left, weeks along the bottom, the legend underneath.

The **bars** are each week on its own: green is cash in (unclaimed contract stages by their expected date), red is cash out (supplier invoices by their due date). Both include GST, so they are comparable.

The **line** is your forecast cash position — the running total of all those weeks added up, so it answers "where do I end up". The closing figure is printed at the end of the line, and turns red if the position ends below zero. The bars and the line share the one scale on the left, so every point can be read straight off it.

Hovering any week shows cash in, cash out, that week's net, and the position at that point.

This is a forecast from what is recorded, not a prediction: a stage with no expected date and an invoice not yet entered are both invisible to it. If no supplier invoices are due in the window, the chart says so rather than leaving you to wonder where the red bars went.

Claimed vs contract

For each job, how much of the contract price plus approved variations has been claimed so far, with the balance still to claim. Ordered so the job with the most left to bill is at the top. Jobs without a contract price are not shown.

Client selections

One row per job that has a selections schedule. The bar is how many items you have approved. The figure on the right is the selections so far against their allowances — pink when the client's choices are estimate

more than the estimate allowed for, which is a variation waiting to be raised. A **to review** badge counts items the client has confirmed through their link that you have not yet approved.

Jobs are ordered most-over-allowance first, so a blown allowance is the first thing on the page rather than something you find on the schedule. Click a row to open that schedule. Figures here are ex GST, the same basis as the schedule itself.

Every chart has a table

The **Table** button in the corner of each chart swaps the drawing for the numbers, including the jobs that did not fit in the chart. Sales estimates are left out of both charts — they are not jobs yet.

Make it your own

Click **Customise** at the top right of the Dashboard. A panel opens down the right-hand side listing every card, and the page moves over so you can see it change as you go.

- **Tick or untick** a card to show or hide it.
- **Choose a width** for each card: a full row, three quarters, two thirds, half, a third or a quarter. Key figures and Quick actions always take a full row.
- **Move cards up or down** with the arrows to change the order.

Cards fill each row from left to right, so pair widths that add up to a full row: half + half, three quarters + a quarter, or two thirds + a third. The small preview at the top of the panel shows exactly how your cards will sit, gaps included.

Click **Save** to keep your layout, or **Cancel** to put the page back as it was. **Reset to default** brings back the original layout.

Your layout is saved to your account, not to the computer, so it follows you to any device — and it is yours alone: nobody else's Dashboard changes. On a narrower screen, part-width cards become halves, and on a tablet or phone every card takes the full width.

Who sees what

The Dashboard only ever shows jobs you have access to, exactly as the Calendar and the Projects List do. Two people in the same company can see different dashboards, and a counter here will never include a job you cannot open.

Not yet on the Dashboard

- Cash going out on purchase-order-linked schedule tasks (the Cashflow page's projection). The forecast here uses entered invoices only.
- A "my jobs only" switch by site manager.

A Monday routine

Five minutes before anything else:

1. **Latest messages** — is anyone waiting on an answer from you, especially a client?
2. **Next claim dates** — has any job passed a stage without a claim being raised? That is money you have earned and not invoiced, and it is invisible everywhere else.

3. **Client selections** — is anyone drifting over allowance without a variation? A client $9,000 over with no variations raised is a difficult conversation being deferred.
4. **This week** — what is on, and is anything still unconfirmed?
5. **Cash forecast** — is the shape still what you expected?

Everything on that list is cheaper to deal with on Monday than at month end.

CHAPTER 6

What is in each plan

The difference between the Estimator, Builder and Enterprise plans, what every plan includes, and what the padlock next to a menu item means.

SmarteBuild comes in three plans. Which one you are on decides which modules appear in your menu, and which appear with a padlock.

- **Estimator** — everything involved in pricing a job and getting a tender out.
- **Builder** — all of that, plus everything involved in running the job on site, and the mobile app.
- **Enterprise** — everything in Builder, plus the features a group of companies needs: one login across several companies, a shared supplier list and price list, people limited to the companies they work in, and onboarding with your existing data moved across for you. Priced on request. See Running several companies.

A **free trial** gives you the full Builder feature set for 30 days, with no credit card, so you can see the whole workflow before deciding which plan you need.

Every plan includes

- **Unlimited users.** Add everyone who needs a login: estimators, supervisors, the bookkeeper, apprentices on the phone. Each person gets their own permissions, so a site supervisor can have the schedule and the diary without seeing margins.
- **Unlimited storage.** Drawings, photos, supplier documents and specifications, with no gigabyte meter. Fair use applies; a normal builder never reaches it.
- **Unlimited projects.**
- Support by email and live chat, the help centre and the tutorial videos.

Plans are priced per company, monthly or annually (an annual plan is ten months for twelve). See smartebuild.com.au/pricing for the current figures.

The difference in one line

Estimator takes you up to winning the work. Builder takes you through delivering it.

If your business prices jobs and hands them over, Estimator is the plan. If you price the job and then build it — raising orders, claiming progress, running the schedule, keeping the diary — you need Builder.

What each plan includes

Module	Estimator	Builder / Enterprise
Dashboard	●	●
Leads	●	●
Projects List	●	●
Project Details	●	●
Documents	●	●
Take-Off	●	●
Cost Codes	●	●
Bill of Quantities	●	●
Suppliers	●	●
Price Lists	●	●
Tenders & Quotes	●	●
Quotes Received	●	●
Purchase Orders	—	●
Variations	—	●
Progress Claims	—	●
Expenses	—	●
Colour Selection	—	●
Schedule & Booking	—	●
Site Diary	—	●
Timesheets	—	●
Checklists & Safety	—	●
Defects	—	●
Messages	—	●
Client portal	—	●
Earned Value	—	● (History and the S-curve: Enterprise only, also in the trial)
Mobile app	—	●

Cash flow is not a separate module — it is a tab inside Schedule & Booking, so it comes with it.

> **Two Builder modules sit in the Estimating menu group — Purchase Orders** and **Colour Selection** appear under *Estimating* in the menu, because that is where they sit in the flow of a job — but both are Builder features.
>
> On an Estimator plan you will see them there with a padlock. That is expected, not a fault.

What Builder adds, and why you would want it

Everything in the second column exists because the estimate is only the start.

- **Purchase Orders** turn BOQ items into commitments, so you can see committed cost against what you allowed before the invoices arrive.
- **Expenses** records those invoices against the orders, closing the loop on actual cost.
- **Variations** handle the changes, and flow into both the contract sum and your claims.
- **Progress Claims** get you paid, claiming against contract stages or percentage complete.
- **Schedule & Booking** plans the work, books the trades and produces call-up sheets.
- **Site Diary, Timesheets and Checklists** are the daily record from site, and timesheet labour lands on the job's Budget once approved.
- **Colour Selection** runs the client's selections schedule.
- **Defects** tracks the punch list through to handover, and sends each supplier their list to rectify.
- **Messages** keeps the project conversation attached to the project, on the desktop and the phone. It replaced the old Feeds module, and Feeds' posts were imported into it.
- **The client portal** gives each client one private page for their documents, selections, variations, claims, photos and messages — which is what stops the stream of emails and the "can you send me that again?" calls.
- **Cash flow**, inside Schedule & Booking, shows money in and out across the life of the job.
- **Earned Value** puts the estimate, the schedule and the supplier invoices side by side for one job — whether it is ahead or behind, under or over — and forecasts what it will cost in the end.

The padlock in the menu

A module shown with a **padlock** is one your company's plan does not include. The menu item is still there — so you can see what exists — but it will not open.

That is different from a module shown **greyed out without a padlock**. That one is included in your plan, but your user account has not been given access to it. Your administrator can grant it under **Users**.

What you see	What it means	Who fixes it
Normal menu item	You have access	—
Greyed out, no padlock	Your plan includes it; your login does not have access	Your administrator, under Users
Padlock	Your plan does not include it	Upgrade the subscription
Not in the menu at all	The module is switched off system-wide	SmarteBuild support

This distinction is worth knowing, because the two look similar and have completely different fixes. If one person on your team can open Purchase Orders and another cannot, it is user access, not the plan — the

plan applies to everybody in the company at once.

Changing plan

Plan changes are made against your company account, not per user, so everyone in your business moves at once. An administrator does it in the Admin panel under **Subscription → Change plan**; the change is immediate and the price difference is prorated by Stripe. See Subscribing and changing plan.

PART II

Set up your company

The settings you do once: people, suppliers, price lists and billing.

7 Set up your company
8 Running several companies
9 Users and access
10 Subscription and billing
11 Suppliers
12 Price lists

CHAPTER 7

Set up your company

The things you configure once and every job draws on - users and permissions, suppliers, and price lists.

Company setup is the top level of the hierarchy. You do it once, and every project you ever create draws on it.

Three things are worth getting right before you price your first job.

Users and access

Who is in your business, and what each of them can do.

Access works on three separate levels, and they fail in different ways:

- **The plan** decides which modules exist for the company.
- **Module access** decides which of those a user can open.
- **Project and estimate permissions** decide which jobs they can see.

A user can have full access to the Bill of Quantities and still see nothing, because they have no project permissions. Knowing which control is involved is most of diagnosing an access problem.

- Adding users
- Roles and access
- Email settings
- Your profile

Suppliers

Everyone you buy from or subcontract to. Held at company level, so a supplier added on one job is available on all of them.

The field that repays the effort is **trades** — it is what lets Tenders offer you the three roofers rather than all four hundred suppliers.

- Why suppliers matter
- Adding and editing suppliers
- Importing and merging

Price lists

Your rates. A structured set of descriptions, units and rates that BOQ items are built from, so the same work is worded and priced consistently on every job.

This is the highest-leverage thing to set up properly. An estimate built from a maintained price list takes a fraction of the time — and, more importantly, its rates can be refreshed in bulk when prices move. Rates typed by hand never can.

- What a price list is for

- Building a price list
- Categories and structure
- Products
- Keeping rates current

Subscription and billing

Your plan, your invoices and your card live in a separate site, the Admin panel, which only administrators can open. Billing is one flat subscription per company through Stripe — unlimited users, storage and projects on every plan — so there is nothing to meter and nothing to top up.

- The Admin panel
- Subscribing and changing plan
- Invoices, your card, pausing and cancelling

In what order

If you are setting up from scratch:

1. **Users**, so your team can get in.
2. **Suppliers**, with their trades filled in.
3. **Price lists**, built up over your first two or three jobs rather than in one sitting — see Building a price list.

Then price your first job.

CHAPTER 8

Running several companies

One login across several companies, a shared supplier list and price list from the master company, and giving each person access only to the companies and modules they need.

Some businesses are not one company. A group with two trading entities, a franchise with branches, a builder who runs a separate company for developments — each needs its own jobs, its own numbers and its own reporting, but not its own copy of everything.

A **company pool** joins them. One company is the **master**, the others are members. People work across them with one login, and the lists worth keeping in one place — suppliers, price lists, templates — come from the master.

> **Set up with SmarteBuild** — Pools are part of the **Enterprise** plan and are set up with you rather than switched on from a settings page. Talk to SmarteBuild about how your group is organised and which company should be the master.

What the master company is for

The master is the company whose lists the others can borrow. It is usually head office, or the original company the business started as.

It is not a parent that owns the others' data. Jobs, estimates, orders and invoices stay with the company they belong to, and nothing is pooled unless you ask for it.

What each company can share

Each member company has its own settings, under **Companies** in the Admin panel - press a company to open them:

Setting	What it does
Can use the main company's suppliers	The master's suppliers are available in this company
Can use the main company's price lists	The master's price lists are available in this company
Keeps its own suppliers too	This company keeps its own supplier list
Keeps its own item prices	This company sets its own prices, rather than using the master's

The last two are the ones that decide whose list you are actually editing. With separate pricing **off**, a rate changed here is the group's rate and everybody gets it. With it **on**, this company's prices are its own and the master's are left alone.

Which to choose

One list for the group — separate turned off — suits a franchise or a group buying on one set of supply agreements. Negotiate once, and every branch prices off the same rates.

Separate lists suit companies that genuinely buy differently: different state, different suppliers, different freight. Sharing rates across them produces estimates that look consistent and are wrong.

You can mix the two. A common arrangement is shared **suppliers** so everybody orders from the same approved list, with **separate pricing** so each branch keeps its own negotiated rates.

What people see

Access is per person, per company. For each user you pick the company, then set what they get in it — the modules, and which jobs.

That means one person can be an estimator in one company and a site supervisor in another, with margins visible in one and hidden in the other. Somebody who should only ever see one branch is only given that one.

Sign in once, and you are in your own company. Open a job belonging to another company in the pool and you move into that company with it — its projects, its dashboard, its numbers. Nothing from the company you left is mixed in.

> **The company you are in is the company you are working on** — Raising an order or a claim always uses the company whose job you have open, not the one you signed in to. When people work across several branches in a day, the habit worth teaching is to check the job first — the rest follows from it.

What the estimate can reach

When you price a job, the items you can pull in come from three places:

1. **The SmarteBuild price list**, available to everyone.
2. **This company's own price list.**
3. **The master company's price list**, when this company is set to use it.

Call-up sheet templates work the same way, so a group can write its standard call-ups once in the master and every branch has them.

Setting it up

1. Decide which company is the **master** — the one whose lists the group should share.
2. SmarteBuild creates the pool and adds the member companies.
3. For each member, choose the four sharing settings above.
4. Give each person access to the companies they need, and set their modules and jobs in each one.
5. Check it with one real job before the group moves across: open a job in a member company, price an item, and confirm the rate that came through is the one you expected.

Step five is worth the ten minutes. Shared-versus-separate pricing is the setting people get the wrong way round, and it is much easier to see on one item than to unpick across a finished estimate.

CHAPTER 9

Users and access

9.1 Adding users

Creating a user account, the details each one needs, and disabling someone who has left.

Users are managed in the Admin panel, under **Users**: everyone is listed on the left, and the person you pick opens on the right with four tabs - **Profile**, **Modules**, **Projects** and **Email**. Everyone in your business who needs SmarteBuild gets their own account. Every plan has unlimited users.

Creating one

Press **Add user**. It asks for:

Field	What it is
First name / **Last name**	Their name, shown throughout
Email	Their login, and where notifications go. Each person needs their own - an address another user already has is refused
Position	Their role in the business, printed under their name on orders and emails
Mobile or phone	Optional
Administrator	Whether they can manage users, the subscription and company settings
Email them their sign-in details now	Sends a welcome email with a temporary password; they choose their own password when they first sign in

After **Add user** you land on their **Modules** tab. Then set what they can reach — see Roles and access.

One account per person

Never share a login.

Every measurement, order, claim and variation records who created it and who changed it. A shared account makes that record meaningless, and it is the record you need when a number is queried or something goes wrong.

It also means someone leaving requires changing a password everybody uses, which nobody gets round to.

> **Shared logins destroy the audit trail** — "Who changed this quantity?" has an answer if everyone has their own account, and no answer at all if three people share one. The history is one of the more valuable things the system keeps.

Administrators

Administrator grants management of users, the subscription and company settings.

Keep it to the people who genuinely need it — usually one or two. An administrator can change what everyone else can see and do, which is not a permission to hand out because someone asked.

Have at least two. One administrator on annual leave with a user locked out is an avoidable problem.

You cannot remove your own **Administrator** tick, or disable or delete your own account - another administrator has to. That is what stops a company ending up with nobody who can get in.

When someone leaves

Two options, and the difference matters:

	Disabled	Deleted
They can log in	No	No
Their history is preserved and attributed	Yes	Reduced
Reversible	Yes	Less so

Disable is nearly always right. It stops access immediately and keeps their work attributed to them — which is what you want when a job they estimated is queried a year later.

Choose between them with **Status** on the **Profile** tab. **Show disabled and deleted**, above the list, brings them back into view.

Delete, at the top of someone's page, removes them completely - but only for someone with nothing recorded against them (no orders, notes, timesheets and so on), such as an account made by mistake. Everyone else is set to **Deleted** instead.

Disable the account the day someone leaves. It is the one bit of housekeeping that matters immediately.

What a new user needs

Beyond the account:

1. **Module access** — which parts of the system they can open
2. **Project permissions** — which jobs they can see
3. **Email settings**, if they will send orders or claims — see Email settings
4. Their own **profile and signature** — see Your profile

A user with an account and nothing else logs in to an empty screen, which is the most common "it is not working" report from a new starter.

Xero integration

Can use the Xero integration, on the **Profile** tab, controls whether that user can push orders and expenses to Xero.

Grant it to whoever does the books, and not to everyone. See Integrations.

Other things you can do for someone

The buttons at the top of a person's page:

Button	What it does
Email sign-in details	Sends the welcome email again, with a new temporary password - for a new starter who lost the first one
Reset password	Emails a temporary password; they set a new one when they next sign in
Duplicate	Makes a copy with the same modules, projects and permissions - the quickest way to set up a second person in the same role. Change the copy's name and email before they use it
Delete	Shown only for someone with nothing recorded against them; see above

Other settings on the **Profile** tab: **Give them every new project automatically**, **Send them a copy of every purchase order**, and **Hide modules they cannot open**, which keeps their menu short instead of showing locked items.

9.2 Roles and access

The four separate controls that decide what someone can reach, how to tell them apart, and sensible setups for common roles.

Four separate things decide what a user can reach and do. They fail in different ways, and diagnosing an access problem is mostly working out which one is involved.

The four controls

Control	Set where	Decides
The plan	Your subscription	Which modules exist for the company
Module access	Users, **Modules** tab	Which of those a user can open
Module permissions	Users, **Modules** tab, the permissions list under a module	What they can do inside it: edit, delete, approve, send, see money
Project and estimate permissions	Users, **Projects** tab - or the project's **People** tab	Which jobs they can see

They apply in that order. A module your plan excludes cannot be granted to anyone; a module a user cannot open is invisible regardless of their project permissions.

Diagnosing

Symptom	Cause	Fix under
Padlock on the menu item	Plan excludes it	Change plan in the Admin panel
Greyed out, no padlock	No module access	**Users**, **Modules** tab
Module opens, no projects listed	No project permission	**Users**, **Projects** tab
Project opens, an estimate is missing	No estimate permission	**Users**, **Projects** tab - open the project's estimates
Module opens, a button or the price columns are missing	A module permission is off	**Users**, **Modules** tab, the permissions under the module. See Module permissions
Not in the menu at all	Switched off system-wide	SmarteBuild support

The middle four are the ones you can fix yourself, and the second and third look similar enough to be confused constantly. The distinguishing question: **can they open the module at all?** If yes, it is permissions. If no, it is module access.

Sensible setups

Estimator

Modules	Projects, Documents, Take-Off, Cost Codes, BOQ, Tenders, Quotes
Projects	The jobs they are pricing
Administrator	No

They do not need Purchase Orders or Claims, and giving access to modules someone does not use makes the menu harder to navigate rather than more useful.

Site supervisor

Modules	Documents, Schedule & Booking, Site Diary, Checklists & Safety, Defects, Messages, Purchase Orders
Projects	Their jobs only
Administrator	No

The interesting question is Purchase Orders. Supervisors often need to raise orders on site, and they generally should not see the whole job's margin. Grant Purchase Orders; leave the BOQ off. If they do need the BOQ for quantities, give it and switch off its two *See money* module permissions.

Contract administrator

Modules	Orders, Expenses, Claims, Variations, plus BOQ read access
Projects	All live jobs
Administrator	No

Business owner

Modules	Everything
Projects	All
Administrator	Yes

Grant what people need

The default instinct is to give everyone everything, because it avoids being asked. It is worth resisting for two reasons, neither of which is distrust.

A shorter menu is easier to use. A supervisor with fifteen modules they never open has to find the three they do.

Estimate data is commercially sensitive. Your margin, your rates and what you pay each subcontractor are not information every user needs, and site staff work alongside the subcontractors in question.

> **Project permissions are the sharper tool** — Rather than restricting modules heavily, give people the modules they need and use project permissions to limit which jobs. Someone who can use Purchase Orders properly but only on their own two sites is both useful and contained.

Reviewing

Worth a look twice a year, and immediately when someone changes role:

1. Anyone disabled who has left?
2. Anyone still on projects they finished a year ago?
3. Anyone an administrator who does not need to be?
4. Anyone who changed role and kept their old access as well as their new?

The fourth is the one that quietly accumulates.

9.3 Module permissions

The switches inside each module that decide who can edit, delete, approve, send and see money, with the full list.

Module access decides whether someone can **open** a module. Module permissions decide what they can **do** once they are in it: edit, delete, approve, send things outside the company, and see money.

Where to set them

1. Open the **Admin panel** and go to **Users**.
2. Pick the user on the left, then the **Modules** tab.
3. Beside a module they have access to, press **N of M permissions** to open its list.
4. Tick or untick each permission. **All** and **None** do the whole module at once.

Every tick saves straight away - there is no Save button to forget. Modules and projects are set per company: if you manage several, choose the company in the menu first.

Changes apply the next time the user loads a page. They do not need to sign out.

Three rules worth knowing

Administrators can do everything. A user ticked as Administrator passes every permission, whatever the switches say. The permissions window tells you when you are looking at an administrator. To restrict someone, remove the Administrator tick first.

Giving a module gives all its permissions. When you tick a module, every permission in it is switched on. Then take away the ones this person should not have. It is quicker than switching on fifteen things for every new starter.

Without a permission, the button is not there. The user does not see a Delete button they cannot use. If they reach the action some other way, SmarteBuild refuses it and names the permission they need, so they know what to ask you for.

Seeing money

These are the ones to think about for site staff, who work alongside the subcontractors whose prices are in the system:

Permission	Module	Without it
See money figures	Dashboard	Counts and dates only, no dollar tiles
See lead value	Leads	Leads without their dollar value
See cost rates and totals	Bill of Quantities	Quantities and descriptions, no rates
See markup, margin and sell price	Bill of Quantities	No markup, margin or sell columns
See quoted prices	Tenders & Quotes	Who quoted, not how much
Show Order Value	Purchase Orders	Orders without prices, and order PDFs without prices
Show Actuals	Purchase Orders	No invoiced-to-date figures
See cost and margin	Variations	The client price only
See prices and allowances	Colour Selection	The choices and rooms, without the allowance, the price or the difference
See Costs	Schedule & Booking	Tasks without cost
Access Cash Flow	Schedule & Booking	No cash flow view
See pay rates and labour cost	Timesheets	Hours only

The full list

Module	Permissions
Dashboard	See money figures
Suppliers	Add and edit suppliers · Delete suppliers · Import suppliers from a file
Price List	Add and edit items and prices · Delete items and headings · Import price lists
Leads	Add and edit leads · Delete leads · See lead value · Convert a lead into a project
Project Details	Create and duplicate projects · Edit project details · Delete projects and estimates · Manage client portal access
Documents	Upload and edit documents · Delete documents
Take-Off	Add and edit measurements · Delete plans and measurements · Send quantities to the BOQ
Cost Codes	Add and edit cost codes · Delete cost codes
Bill of Quantities	See cost rates and totals · See markup, margin and sell price · Add and edit items · Delete items · Print and export
Colour Selection	Edit selections · Share with the client · Push to BOQ or create a variation · See prices and allowances
Tenders & Quotes	Create and edit tenders · Delete tenders · Send tenders to suppliers · See quoted prices · Accept a quote
Purchase Orders	Show Project Information Bar · Print Orders · Generate a new order · Delete Orders · Show Order Value · Show Actuals · Approve Orders · Send Orders · Edit order items and prices
Variations	Approve Variations · Apply Variations to BOQ and Orders · Update Variation Workflow · Create and edit variations · Delete variations · See cost and margin · Send to the client
Progress Claims	Create and edit claims · Delete claims · Approve and unlock claims · Record payments
Expenses	Enter and edit expenses · Delete expenses · Send to Xero
Schedule & Booking	Access Cash Flow · See Orders · See Costs · Add Delay · Edit/Delete Tasks · Send call-ups to suppliers
Site Diary	Add and edit own entries · Edit or delete other people's entries
Checklists & Safety	Manage templates · Fill in checklists · Sign off a checklist · Delete checklists
Timesheets	Enter own time · See everyone's timesheets · Approve timesheets · See pay rates and labour cost
Earned Value	Set and change the plan
Defects	Add and edit defects · Delete defects · Send notices to suppliers · Close defects

The Projects List uses Project Details' permissions, and Quotes Received uses Tenders & Quotes'. Messages has none: anyone in the conversation can post, and only the author can delete their own message.

Two that work together

Site Diary. *Add and edit own entries* lets someone write the diary and fix their own entries. *Edit or delete other people's entries* is for whoever reviews the diary. A supervisor normally has the first and not the second.

Timesheets. *Enter own time* is all a worker needs. Without *See everyone's timesheets* they only ever see their own hours. Give *Approve timesheets* to whoever signs them off, and *See pay rates and labour cost* to payroll.

Sensible starting points

Role	Take away
Estimator	Delete projects and estimates · Approve Orders · everything in Claims and Expenses they do not use
Site supervisor	Every *See money* permission above · every Delete · Approve Orders · Approve timesheets
Contract administrator	Delete projects and estimates · Manage templates
Business owner	Nothing. Make them an Administrator

See also Roles and access for the controls that sit above these: the plan, module access and project permissions.

9.4 Email settings

Setting up sending so orders, tenders and claims go out from your own address, and what to do when mail does not arrive.

SmarteBuild sends orders, tender invitations, variations and claims by email. For those to arrive — and to look like they came from you — sending has to be set up.

The settings

Each person sets up their own, under **Email sending** on their profile. There are three ways:

Way	What it needs
Outlook or Microsoft 365 *(recommended)*	Sign in with Microsoft once. No password is stored.
Gmail or Google Workspace	Sign in with Google once.
Another provider	The email address, mailbox password, outgoing mail server and port

For **Another provider**, **Test and save** sends a real test message before storing anything. If the test fails, nothing is saved and the page says why. **Send a test** checks a saved mailbox again at any time, and the profile shows whether the last send worked.

Getting the values

They come from whoever runs your email. Common ones:

Provider	Host	Port	SSL
Microsoft 365	`smtp.office365.com`	587	Yes
Google Workspace	`smtp.gmail.com`	587	Yes
Most hosts	`mail.yourdomain.com.au`	587 or 465	Yes

> **Microsoft 365 and Gmail: sign in instead of typing a password** — Microsoft is switching password sending off, and Google refuses your normal Gmail password from other programs. Use **Outlook or Microsoft 365** or **Gmail or Google Workspace** on your profile instead - you sign in once and no password is stored. If you must use a password with Gmail, it has to be an **App Password** made in your Google account's security settings.

See also Office 365 and Outlook and Google.

Why per user

So mail comes from the person sending it.

An order from `dave@yourbuilding.com.au` gets a reply to Dave. One from a generic company address gets a reply into a shared mailbox, where it competes with everything else.

It also means the sent mail is in that person's own mailbox if they need it later.

When mail does not arrive

Work through in this order:

1. **Click Send a test** on your profile. If it fails, it is the settings, and the message says which part and what to do.
2. **Microsoft 365 or Gmail?** Switch to signing in, per the caution above.
3. **Check the recipient address** — a typo in a supplier contact is the most common cause of all.
4. **Ask the recipient to check spam.** Mail from a new sender often lands there first.
5. **Check your mail provider's sending limits.** Sending twenty tender invitations at once can trip a rate limit.

SPF and DKIM

If mail sends successfully but consistently lands in recipients' spam folders, your domain's **SPF** and **DKIM** records probably need updating to authorise sending.

That is a job for whoever manages your DNS, and it is worth doing once. Tender invitations that land in spam are lost bids, and you never find out.

BCC yourself

Worth a habit on anything that matters. It gives you a timestamped copy in your own mail system, outside SmarteBuild, which is occasionally exactly what settles a question about whether something was sent.

9.5 Your profile

Your own account - name and picture, sign-in address and password, the address your emails go out from, your signature, mailbox sharing and your preferences.

Profile, from your account menu in the top bar, is your own settings. Everything here affects only you, and nobody else can change it for you.

At the top you see your name, job title, company and when you last signed in. Beside it, **Finish setting up** lists the few things still worth doing - click one to go straight to it. It disappears once they are all done.

The page is split into sections down the left. A dot beside a section means you have changed something there and not saved it yet; SmarteBuild warns you before you leave with unsaved changes.

Your details

Field	What it does
First name / **Last name**	How you appear on orders, tenders, emails and to your team. First name is required.
Job title	Shown under your name - for example Estimator or Site supervisor
Mobile or phone	So suppliers and your team can reach you

Save details keeps them; **Undo changes** puts back what was there.

Beside them, **Company**, **Account type** and **Last signed in** are shown but cannot be edited here. Account type is where you check whether you are an **Administrator** — that is what decides if the Admin panel opens for you, and only another administrator can change it.

Your picture

Drop a picture on the box, or click **Upload**. Any JPG, PNG or GIF up to 5 MB works: SmarteBuild turns it the right way up, crops it to a square and shrinks it, so a photo straight off your phone is fine. **Remove** takes it away and your initials show instead.

Your picture makes Messages, the activity lists and the assignee columns readable at a glance.

Sign-in & password

Changing your sign-in address

Type the **New sign-in address** and your current password, then **Change address**. This is the address you sign in with and where SmarteBuild sends your notifications. It cannot be one another SmarteBuild account already uses.

Changing your password

Type your current password, then the new one twice. The rules show as you type and tick off as you meet them:

- at least 8 characters
- an upper-case and a lower-case letter
- a symbol such as `! # $ %`

A strength bar shows how hard the password would be to guess. Longer is better - a short sentence is easy to remember and hard to crack.

> **Never share your login** — Every action records who did it. A shared account destroys that record, and it is the record you rely on when a number is queried. If a colleague needs access, they need their own account.

After several wrong current passwords in a row, SmarteBuild stops accepting tries for a few minutes - the same protection as the sign-in page.

Last signed in

Worth a glance occasionally. If it shows a time you were not working, change your password and tell your administrator.

Email sending

This is the address your orders, tender invitations, variations and claims go out from. Mail from your own address gets replies to you, and the sent copy sits in your own mailbox. If you have not set it up, the section shows three choices:

Choice	When to use it
Outlook or Microsoft 365 *(recommended)*	Your email is Outlook, Office 365 or Microsoft 365. Sign in with Microsoft once - no password is stored.
Gmail or Google Workspace	Your email is Gmail or a Google Workspace address. Sign in with Google once.
Another provider	Anything else. Type your mail server's details and password.

The first two open a Microsoft or Google sign-in in a new tab. When you come back to the profile page it shows the connection straight away.

Another provider

Pick your **Mail provider** and SmarteBuild fills in the **Outgoing mail server**, **Port** and security for you; choose **Other** and type them if yours is not listed. Then type the **Mailbox password** and your SmarteBuild password, and click **Test and save**.

Test and save sends a real test message to you first. If it does not go through, **nothing is saved** and the page tells you why in plain words - wrong password, server not reachable, app password needed. Your old settings, if you had any, keep working.

> **Microsoft 365 and Gmail usually need more than your normal password** — Microsoft is switching password sending off, so for Outlook and Microsoft 365 use **Outlook or Microsoft 365** above instead. Gmail and Google Workspace accept a password only if it is an **App Password** made in your Google account's security settings - your normal Gmail password is refused.

See Email settings for the server details of common providers.

Once it is set up

The section shows the address, how it connects, and a status:

- **Working** - the last send through it worked.
- **Needs attention** - the last send did not work. The reason is shown underneath.

Send a test sends yourself a test message at any time. **Change settings** (or **Connect again** for Microsoft and Google) fixes a mailbox that has stopped working - for example after you changed your email password. **Stop sending from this address** removes it, and anyone you shared the mailbox with loses access to it too.

The coloured dot beside **Email sending** in the left list shows the same status at a glance.

Email signature

Your signature is added wherever an email template says `$Signature$` - orders, tender invitations, variations and claims. There is one signature and it is the one that goes out.

The editor works like a small word processor: **Bold**, **Italic**, **Underline**, **Text colour**, **Link**, **Bulleted list**, **Add a picture** (your logo) and **Clear formatting**.

- **Start from my details** writes a tidy starting signature from your name, job title, company and phone - edit it from there.
- **Pasting from Outlook or Word** works. SmarteBuild strips the hidden Word formatting that makes signatures look broken in other people's mail, and keeps bold, colours and links. Pasted pictures are uploaded for you.
- **How it looks in an email** shows your signature under a sample order email, as a supplier would see it.

Save signature keeps it.

Keep it short: name, job title, company, phone and website. A subcontractor reading an order on a phone does not need six lines of disclaimer.

> **You also have an older signature** — The old profile page had a second signature tab that was never actually put on any email. If you typed something there, the page shows it and offers **Use this one** to bring it into your real signature.

Mailbox sharing

Lets someone else in your company send from your address - for example an office manager sending orders on your behalf. Only works once your email sending is set up.

Type a name in **Add someone** and pick them (or press Enter for the first match). **Add everyone** gives the whole company access in one go - you are asked to confirm. **Remove** takes access away again.

Mailboxes shared with me lists the addresses other people have shared with you. These appear in the "send from" list on orders, tenders and variations. Here each one shows **Working** or **Not checked** - if it is not checked, ask its owner to send a test.

Preferences

Switches that change how SmarteBuild behaves for you. Each one saves the moment you flick it and follows you to any computer.

Group	Preference
General	**Hide the Getting started page** - the checklist that opens after you sign in on a new account
General	**Show job numbers in project lists**
Bill of Quantities	**Warn me when a price list rate changes** - flags BOQ items whose price-list rate has moved since you priced them
Bill of Quantities	**Open BOQ operations in a new window**
Documents	**Publish my uploads straight away**
Documents	**Share my uploads with everyone** - not only people on the project
Documents	**Open each file in its own window**
Email	**Weekly procurement email** - on Monday morning, the items you look after on every job's procurement list that have to be chosen or ordered this week or next. On unless you switch it off; sent only when something is due
Xero	Connect when you sign in, reconnect when the connection runs out, switch organisation when you switch company, disconnect when you sign out

The Xero ones only matter if your company is connected to Xero.

Appearance

Night mode and **Narrow side menu** change the look of SmarteBuild on this computer only - another computer keeps its own setting. Changing either reloads the page, so save anything else first.

Worth doing on day one

Five minutes, and it makes everything you send afterwards look right. **Finish setting up** at the top of the page tracks the first four:

1. Add a picture.
2. Add your phone number (and check your name and job title).
3. Set up email sending - **Outlook or Microsoft 365** if you can.
4. Write your signature - **Start from my details** is a good start.

5. Change your password to something unique.

My activity, at the bottom of the left list, shows what you have done in SmarteBuild recently.

CHAPTER 10

Subscription and billing

10.1 The Admin panel

Where your subscription, invoices, users and company settings live, who can open it, and what each section is for.

Your subscription is managed in a separate site, the **Admin panel**, at admin.smartebuild.com.au. It uses the same email address and password as SmarteBuild itself, but only an **Administrator** can sign in — see Adding users for who that should be.

Keeping it separate is deliberate. Everything on it changes what the whole company can do or what the company is charged, so it sits behind the administrator role rather than in a menu every user can see.

What is on it

A menu down the left side has four sections. Moving between them is instant: the page does not reload.

Section	What it is for
Subscription	Your plan, whether it is active and when it next renews, your tax invoices, and the buttons to subscribe, change plan, update the card, pause or cancel
Users	Everyone who signs in: their details, which modules, projects and estimates each person can open, and the mailbox their emails go out from. This is the only place users are managed
Settings	Company name, ABN, address, GST and markup defaults, your logo, and the bank accounts printed on your claims and variations
Companies	For businesses that run more than one entity: add another company and choose what it shares with the main one

You land on **Subscription** after signing in. The bottom of the menu has **Open SmarteBuild**, **Help** and **Sign out**. On a phone, the menu opens from the button at the top left.

If you manage more than one company, the **Company** drop-down at the top of the menu chooses which one you are looking at. Subscription, Settings, and the modules and projects on Users all follow it.

Who bills you

Billing is handled by **Stripe**. When you subscribe, you enter your card on Stripe's secure page, not on ours, and Stripe charges it each month or year and emails you a tax invoice every time. SmarteBuild never sees or stores your card number. The Admin panel shows you what Stripe knows and hands you across to Stripe's own page for anything to do with the card itself.

> **Note** — Stripe's payment page shows the account holder as **Breinz PTY LTD**. That is the company behind SmarteBuild, and it is what appears on your card statement.

The pages in this section

- Subscribing and changing plan — from the free trial to a paid plan, monthly or annual, and moving between Estimator and Builder.
- Invoices, your card, pausing and cancelling — where the invoices are, what to do when a payment fails, pausing for up to three months, and how cancellation works.
- Company details, logo and bank accounts — what prints on your documents, your default GST and variation markup, and the accounts clients pay into.

For which modules each plan includes, see What is in each plan.

10.2 Subscribing and changing plan

Going from the free trial to a paid plan, choosing monthly or annual billing, and moving between Estimator and Builder.

Every SmarteBuild company is billed the same way: one flat subscription per company, on the **Estimator** or **Builder** plan, paid monthly or annually. There is nothing per user and nothing per gigabyte — every plan includes unlimited users, storage and projects.

Current prices are on smartebuild.com.au/pricing. Prices are in Australian dollars and **include GST** — the figure you see is the figure you pay, and your tax invoice shows the GST component separately.

From the trial to a plan

The free trial gives you the full Builder feature set for 30 days with no card. When it ends, SmarteBuild tells you at sign-in and sends you to the Admin panel. You can subscribe any time before that too.

1. Sign in to admin.smartebuild.com.au as an administrator. You land on **Subscription**.
2. Press **Subscribe**.
3. Choose the plan — **Estimator** or **Builder** — and **Monthly** or **Annual**. The total updates as you choose.
4. Press **Continue to secure payment**. You are taken to Stripe's page to enter the card and billing address.
5. When the payment goes through you are brought back to Subscription, which now shows the plan as **Active** with the next renewal date.

Access is switched on the moment Stripe confirms the payment, usually within a few seconds. If the page says the payment is still being confirmed, refresh it a minute later.

> **Tip — Annual is ten months for twelve.** If you know you will be using SmarteBuild for the year, paying annually saves two months. You can switch between monthly and annual from Stripe's billing page — see Invoices, your card, pausing and cancelling.

Choosing between Estimator and Builder

Estimator takes you up to winning the work; Builder takes you through delivering it. The full module-by-module comparison is in What is in each plan. If you are unsure, start on Estimator — upgrading is a button, and the difference is prorated.

Changing plan

Plan changes apply to the whole company at once; there is no per-user plan.

1. On **Subscription**, press **Change plan**.
2. The two plans are shown side by side with what each includes; yours is marked **Current**. Pick the other one.
3. The exact charge (or credit) appears underneath before anything happens. Press **Upgrade and pay**, or **Downgrade**, to confirm.

Upgrading is charged straight away. You pay the difference between the two plans for the rest of the current month — or year, on annual billing — and the confirmation shows the exact amount before you agree to it. If the card payment does not go through, nothing changes: update your card under **Card & invoices** and try again. From your next renewal you pay the new plan's price.

Downgrading also takes effect at once. The unused part of what you paid for the dearer plan is taken off your next invoice. You are never charged twice for the same days.

Modules appear or disappear from everyone's menu straight away. Nothing is deleted on a downgrade — a Purchase Order raised on Builder is still there if you move to Estimator; you just cannot open the module until you upgrade again.

> **Note** — You cannot change plan while your subscription is **paused** or **set to cancel**. Resume it, or press **Keep my subscription**, first — then change plan. If it is the price that made you cancel, moving to Estimator may be the better answer.

Monthly or annual

To switch between monthly and annual billing, press **Card & invoices** on **Subscription** and pick the other option on Stripe's billing page. Moving to annual charges the year straight away, less what is left of the month you have already paid for. Moving to monthly credits what is left of the year against your monthly invoices, so you do not pay again until that credit is used up.

Enterprise

Enterprise is Builder with onboarding and priority support, priced by agreement for franchises and multi-entity businesses. It is set up by SmarteBuild rather than from the Subscribe button. Contact us through the website.

Discounts and promotions

If you were given a promotion code at sign-up, or a negotiated rate, it is applied to your subscription at Stripe and shows as a discount line on every invoice for as long as it lasts. There is nothing to enter here after the first time. If a discount you were promised is not on your invoice, contact SmarteBuild — it is fixed on our side, not by re-subscribing.

Businesses with more than one company

Companies lets one administrator run several entities from one login, each with its own subscription. Adding a company there creates it and then takes you to its **Subscription** page to subscribe. The **Company** drop-down at the top of the Admin panel menu switches between them.

10.3 Invoices, your card, pausing and cancelling

Where your tax invoices are, what happens when a payment fails, updating the card, pausing for up to three months, and how cancellation works.

Once you are subscribed, Stripe does the billing and the Admin panel shows you what Stripe knows. Four things come up: finding an invoice, fixing a card, pausing for a while, and stopping altogether.

Your invoices

Every charge produces a **tax invoice**, emailed to the administrator's address by Stripe at the time of the charge. Your last twelve are also listed under **Invoices** on the **Subscription** page, newest first, with the period each one covers, the amount and its status. For older ones, press **All invoices and receipts**, which opens your full history on Stripe.

Button	What it does
View	Opens the invoice on Stripe's site — and if the invoice is still unpaid, lets you pay it there
PDF	Downloads the invoice as a PDF for your accountant

Neither needs a Stripe login; the links are yours alone. An invoice shown as **Awaiting payment** is one Stripe has not been able to collect yet — see the next section.

> **Note** — Invoices from before your company moved to Stripe are not on this page. If you need one, ask SmarteBuild support.

When a payment fails

Cards expire and banks decline. When a renewal payment fails:

1. Stripe emails the administrator and **retries the card over the following three weeks**.
2. Your subscription shows as **Payment overdue** on the Subscription page, but **access continues** during the retries — nobody is locked out of a live job because a card expired on a Friday.
3. If every retry fails, the subscription is cancelled and access stops.

To fix it, update the card (below). Stripe collects the outstanding invoice as soon as a working card is on file, and the status goes back to **Active**.

Updating your card

1. On **Subscription**, press **Card & invoices**.
2. Stripe's billing page opens. Under *Payment method*, add the new card and set it as default, then remove the old one if you like.
3. Press *Return to SmarteBuild*.

The same page shows your invoice history and lets you switch between monthly and annual billing.

Pausing instead

Builders have quiet stretches — between contracts, over a wet season, while a big job waits on approvals. Rather than cancelling and losing everything, you can **pause the subscription for one, two or three months**. Nothing is charged while it is paused, and every project, estimate, order and document stays exactly where it is.

1. On **Subscription**, under **Take a break or leave**, press **Pause subscription**.
2. Choose how long — one, two or three months.
3. The dialog shows you the two dates that matter: the day you keep working until, and the day billing restarts. Press **Pause for 3 months** (the button names the length you chose).

What happens while you are paused

Charges	None. Stripe raises no invoice you have to pay until billing restarts
Until the date you have paid to	Everything works exactly as normal — you have already paid for those days, so you keep them
After that date	Sign-in is closed for everyone in the company — on the computer and in the mobile app — and anyone who tries is told the subscription is paused. Anyone still signed in is signed out within a few minutes
Your data	Untouched. Nothing is deleted, archived or hidden
Coming back	**Resume now**, on the Subscription page, any time — you do not have to wait for the end date

When the pause ends, billing restarts by itself and everyone can sign in again. If you resume early, access comes back straight away and the next invoice is collected on its normal date.

> **Note** — A subscription can be paused **once every 12 months**. If you need longer than three months, or a second pause sooner, contact SmarteBuild — we would rather sort something out than lose you.

Cancelling

1. On **Subscription**, under **Take a break or leave**, press **Cancel subscription**.
2. The window shows the date your access ends. Press **Cancel subscription** to confirm - or **Pause instead**, if a break is what you need.

Cancellation takes effect **at the end of the period you have already paid for**, not immediately. The Subscription page shows **Cancelling** and the date access ends; nothing further is charged. Until that date everything works as normal, and **Keep my subscription**, at the top of the Subscription page, reverses the cancellation if you change your mind.

Under the terms, a monthly subscription is not refunded for the remainder of the month; an annual one is refunded less a cancellation fee — the exact terms are on smartebuild.com.au/app-terms.

> **Careful** — After a cancelled subscription ends, the company's data is scheduled for deletion under the terms and cannot be recovered. Export anything you need — BOQs, orders, claims and documents — before the end date.

Coming back

A cancelled company can subscribe again at any time from the same **Subscribe** button, on either plan. If the data has not yet been deleted, it is exactly as you left it.

10.4 Company details, logo and bank accounts

The Settings page in the Admin panel - your company details and ABN, the logo that prints on your documents, default GST and variation markup, and the bank accounts your clients pay into.

Settings, in the Admin panel, holds the details that print on everything you send out. It is worth ten minutes on the day you start, because every quote, order, claim and variation after that carries them.

Changes take effect immediately on new documents. Anything already produced keeps what it had when it was made.

Company details

Your company name, business name, ABN, phone and address.

Field	Where it shows up
Company name	The top of every document you send
Business name	Where you trade under a different name from the registered one
ABN	Tax invoices and progress claims — a claim without one is not a valid tax invoice
Phone, **Street address**, **Suburb**, **State**, **Postcode**	Your letterhead, and how suppliers and clients reach you

Look up finds your details from the ABN register rather than making you type them. Search by name or ABN, pick the right result, and the fields fill themselves in. **Back to results** returns to the list if you picked the wrong one.

> **Check the ABN before your first claim** — An ABN that is missing or wrong is the sort of thing nobody notices until a client's bookkeeper rejects a progress claim. It is on every tax invoice you issue.

Defaults

Two numbers that save typing on every job:

Default GST is the rate applied to new items unless you change it. For most Australian builders that is 10%.

Default markup on variations is the margin added to a new variation. Set it to whatever you normally charge for a change, and the variations you raise start there instead of at nothing — see Creating a variation.

Both are only starting points. Either can be changed on the job, the estimate or the individual variation.

Logo

Upload the logo that prints on your quotes, orders, claims and variations. **Remove logo** takes it off again.

Use the highest-resolution version you have. A logo that looks fine on screen can print soft on a document a client passes to their lender, and that is the one document you would want looking right.

Bank accounts

The accounts your clients pay into. **Add account** takes an account name, the account holder, the BSB and the account number.

They appear in two places:

- On a progress claim, so the client knows where to pay.
- On a variation shared with a client, with the variation number as the reference.

Mark one as **Default** and it is the one new claims and variations use. You can still choose a different account on an individual claim or variation — useful if a particular job or entity is banked separately.

> **Verify the account on the document, not just in this page** — Payment redirection fraud works by changing bank details on a document in transit. Whatever you keep here, check the account printed on a claim before it goes out, and tell clients to ring you on a number they already have if the details ever appear to change.

Delete removes an account. It does not alter claims or variations already issued — those keep the details they were produced with.

Who can change this

The Admin panel only opens for an **Administrator**, so these settings are not something an estimator or a site supervisor can alter by accident. See Roles and access.

If you run more than one company, the **Company** drop-down at the top of the menu decides which one you are editing. Each company has its own details, logo and bank accounts — see Running several companies.

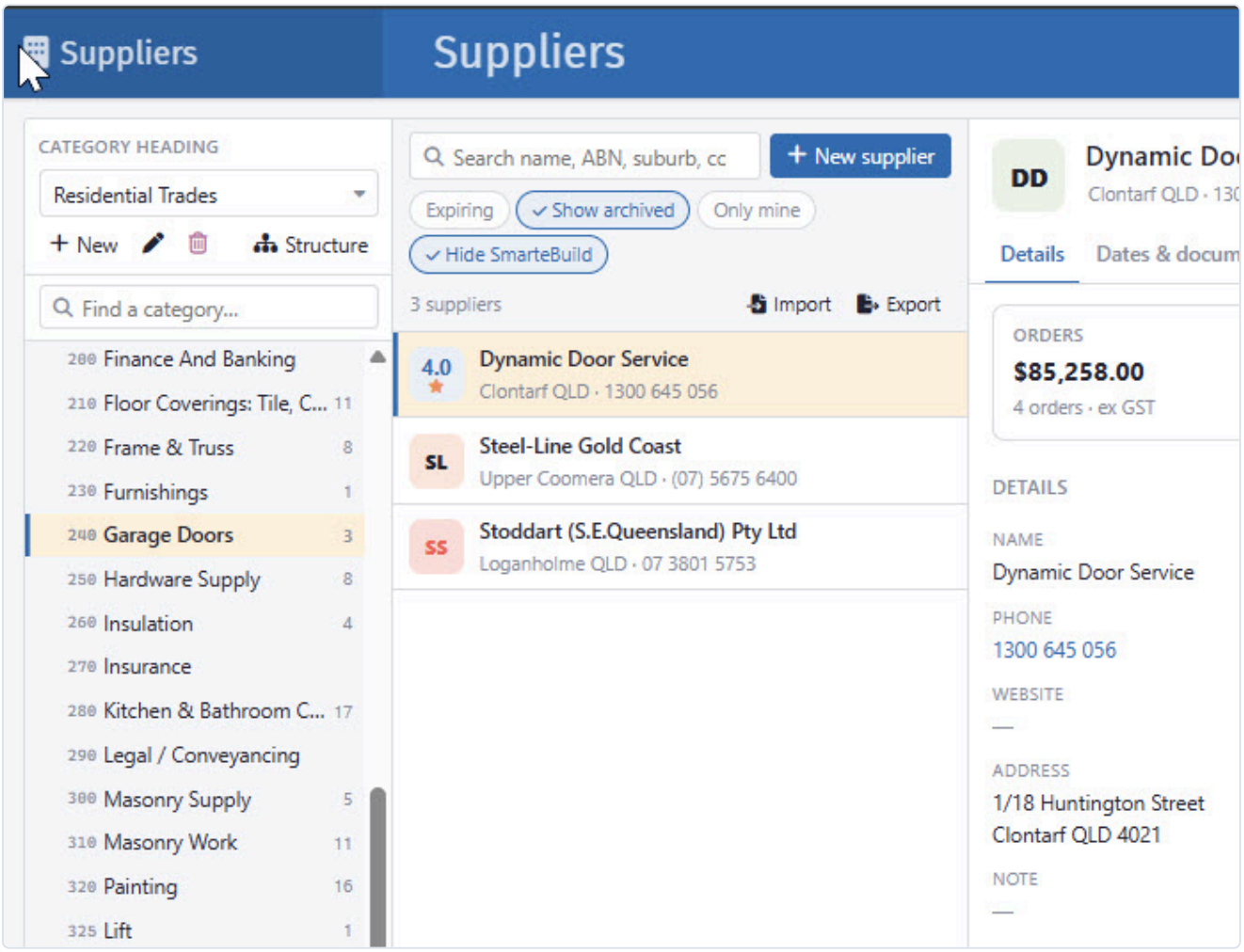
CHAPTER 11

Suppliers

11.1 Why suppliers matter

What the supplier list feeds, what a good supplier record carries, and why filling it in properly saves time on every job afterwards.

Suppliers are everyone you buy from or subcontract to. The list lives at company level, so a supplier added on one job is available on all of them. Open it from the **Suppliers** tile on any page.



Everyone you buy from, in one list the whole company works off.

What reads from it

Module	Uses suppliers for
Price Lists	Whose rates and products a price is
BOQ items	Who you intend to buy from
Tenders	Who gets invited to price a package
Purchase Orders	Who the order goes to, and grouping items into orders
Expenses	Who an invoice is from
Schedule	Who is doing a task, and who gets called up
Defects	Who is notified to fix something

That is a lot of modules reading one list, which is why the fifteen minutes spent filling in a supplier record properly is repaid many times over.

The one thing worth doing well

File them under their trades.

Suppliers are filed in **categories** - your trades, such as *Plumbing* or *Tiling & waterproofing* - in the **Categories** section of a supplier's **Details** tab. Tenders offers recipients by trade, and the list on the Suppliers page filters by the category tree. If nobody is filed anywhere, choosing who to invite means scrolling through every supplier you have ever used, on every package, forever.

With categories filled in, inviting three roofers takes seconds.

> **Categories are the highest-value part of the whole record** — Not the address, not the ABN. The trade is what turns a list of 400 businesses into a usable shortlist at the moment you need one.

What a good record carries

Part	Why
Name	Their legal name, for orders
ABN / ACN	Needed on orders and for your accounts
Phone, **Email** and **Address**	How to reach them and where they are
Contacts	The people you deal with - see below
Categories	What they do - drives tender invitations
Dates & documents	Insurance and licence expiry dates, with the certificates
Ratings	How they perform, on your own scales
Note	Anything worth remembering

Contacts

A named contact matters more than it sounds. An order to `info@` competes with everything else in a shared mailbox; one to the person who priced your last three jobs gets actioned.

Keep it current. A contact who left eighteen months ago is the most common reason an order goes nowhere.

Notes are worth keeping

Note is where the working knowledge goes — the things you would otherwise have to remember or ask a colleague:

> *Good on renovations, not interested in anything under $10k. Ring Steve, do not email. Needs 2 weeks notice minimum. Invoices monthly, 30 days.*

That is the difference between a list of businesses and something that helps you run a job.

In this section

- Adding and editing suppliers
- Importing, merging and deleting

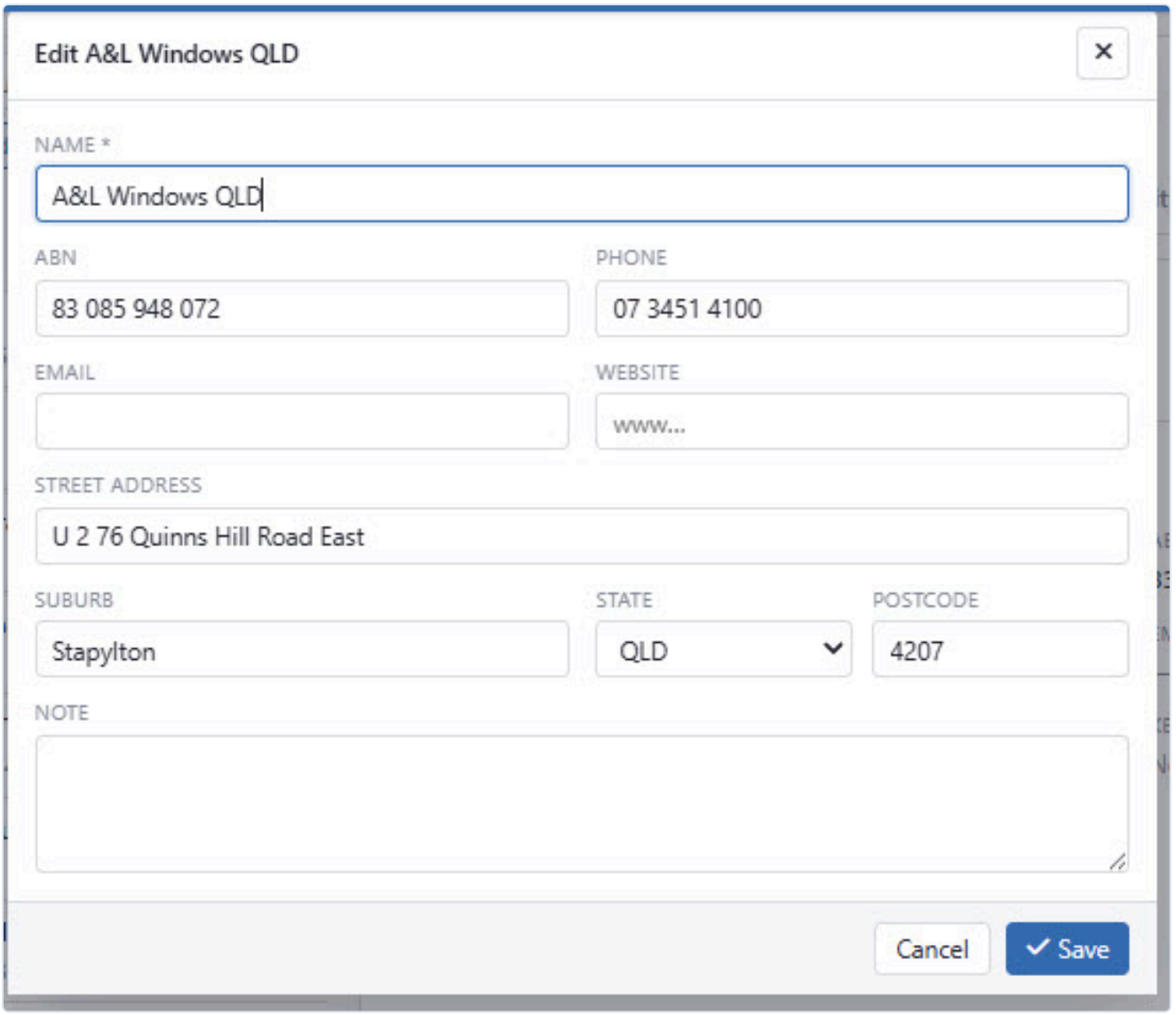
11.2 Adding and editing suppliers

Finding a supplier, every part of a supplier record - contacts, categories, dates and certificates, ratings, products and activity - and archiving the ones you no longer use.

The Suppliers page has three parts, left to right:

- **Categories.** Pick a **Category heading** at the top, then a category in the tree. Type in the box above the tree to find one. **All suppliers** shows everyone filed under that heading, plus the suppliers not filed anywhere yet; **Uncategorised** shows just those. The number beside a category is how many suppliers are filed there.
- **The supplier list.** Search by name, ABN, suburb, phone, email or a contact's name. The tile on the left of each row warns you at a glance - see Dates and certificates.
- **The supplier you picked.** Its **Details** tab holds the supplier's details, then its **Contacts** and **Categories**; the other tabs are **Dates & documents**, **Ratings**, **Products** and **Activity**.

New supplier adds one, filed in the category you have selected.



Contacts, terms, and the details that print on an order.

Filtering the list

Filter	Shows
Expiring	Suppliers with a date that has expired or runs out within 30 days
Show archived	Archived suppliers as well
Only mine	Only suppliers your company added
Hide SmarteBuild	Leaves out the shared suppliers that come with SmarteBuild (marked **Sb**)

The last three, and the heading you picked, are remembered for you.

Details

Field	Notes
Name	Their legal trading name — this goes on orders
ABN / ACN	Needed on orders and by your accounts
Phone, **Email**, **Website**	
Address, **Suburb**, **State**, **Postcode**	Their business address
Note	Working knowledge — minimum notice, who to ring, payment terms

The top of the tab also shows what you have spent with them: orders and invoices (ex GST) and how many quotes you have asked for, and whether the supplier is linked to a Xero contact.

Use the name they invoice under. `Barwon Concrete Pty Ltd` rather than `Barwon` or `the concrete mob` — it goes on purchase orders, and an order made out to a name that does not match their entity causes problems at their end and yours.

Contacts

The people you deal with, each with a phone, email, position and a **type**: general, quotes, orders or call-ups. Orders and call-ups offer the contacts of the matching type first.

A contact who is on an order, a tender or a schedule task cannot be deleted — edit them instead, or add the new person alongside.

The most common reason an order or a tender goes nowhere is a contact who left. When mail bounces, fix the record straight away; when you deal with a new person, add them then.

Categories

The trades the supplier is filed under. **Add to category** picks one from any of your category headings; a supplier can be filed in as many as fit. The tree on the left filters by exactly these.

Structure beside the heading opens the category tree itself for editing, and **New**, the pencil and the bin create, rename and delete a heading. SmarteBuild's own headings can be used but not changed.

Dates and certificates

Dates & documents holds the dates you track for every supplier — *Public liability insurance*, *Workers compensation*, *Contractor licence* — with the certificate for each.

- **Set date** records when it runs out. **Attach** uploads the certificate (PDF, image or document); its name opens it.
- **Date fields** adds, renames or deletes the dates you track. They apply to every supplier, so deleting one removes that date — and its certificate — from all of them.

The list warns you before a date passes:

Tile	Means
! expired, in pink	A date has passed
Today, or a number of **days**	A date runs out within 30 days
A number with a star	No dates due; the supplier's average rating

Expiring in the filters lists everyone who needs chasing.

Ratings

Score suppliers out of five on your own scales — *Quality*, *Price*, *Reliability*. Click a star to rate; click the same star again to clear it. **Rating fields** adds, renames or deletes the scales. The list shows each supplier's average.

Products

The products you buy from this supplier, at the price your company pays. **New product** adds one; clicking a row opens it — name, SKU, price (tick **inc GST** to type a price that includes GST), finish, colour, size, a link and a picture. Products are the same ones as in Price lists: a change here shows there, and filing a product under a price list item is done there.

The list is **grouped by price list item**, so you can see at a glance what is filed where, and what is filed nowhere. Click a group to fold it away. A product filed under two items shows under both, marked *in 2 items*. Turn the grouping off with **Group by price list item** and you get one flat list with a *Price list items* column instead; either way the toggle is remembered.

Click a column heading — Product, SKU, Manufacturer or Price — to sort by it; click again to reverse it, a third time to go back to the list's own order. A faint arrow on the heading shows which ones you can click, and your choice is remembered. Prices sort as numbers, so $90 comes before $1,100. When the list is grouped the sort runs inside each group **and** puts the groups themselves in that order, so sorting by price brings the dearest item to the top.

Changing a lot of them at once

Edit all opens every product of this supplier in one grid: price, SKU, description, manufacturer, size, finish, colour, material, profile, web address and superseded, all editable in place. A group's own **Edit these** opens just that price list item's products.

Changed cells are tinted, and only what you changed is saved, in one go. Inside the grid you can search, narrow to one price list item and sort any column; a row you changed and then filtered out of sight is still saved, and the footer counts it. **Prices I type include GST** applies to every price you type there. Enter moves down the same column, the way a spreadsheet does.

Products SmarteBuild shares with every company show a padlock and cannot be changed here. A price of your own for one of those is set in Price lists.

Activity

The supplier's quotes, purchase orders and invoices across your jobs, with a total. Click a row to open the document.

SmarteBuild's shared suppliers

Suppliers marked **Sb** come with SmarteBuild and are shared by every company. Their details cannot be changed, and they cannot be archived, merged or deleted — that would change them for everyone. You can still file them in your own categories and add your own contacts, dates and ratings. To keep them out of your way, turn on **Hide SmarteBuild**.

Archiving

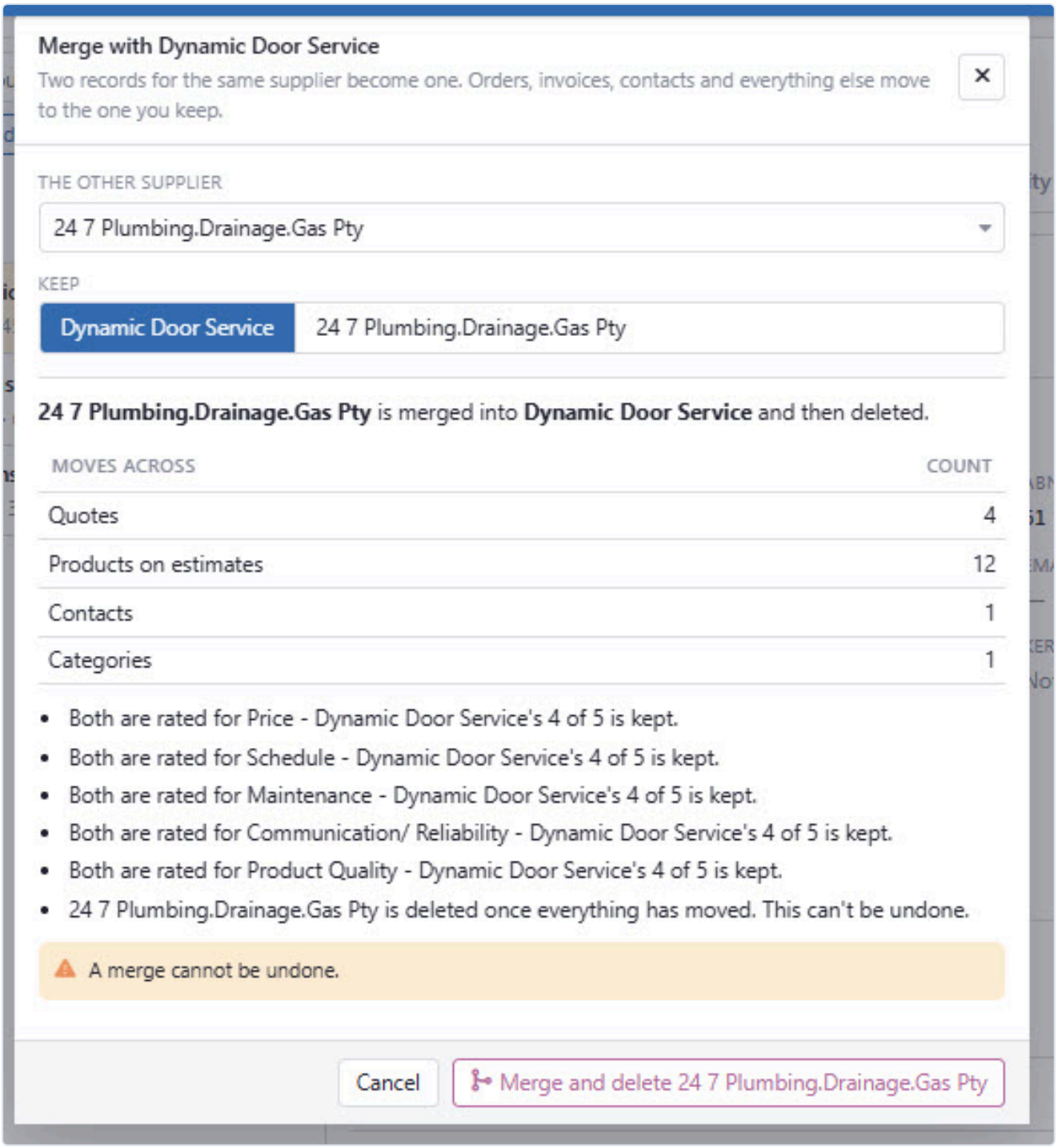
Archive removes a supplier from the working list without deleting them; **Restore** brings them back.

Use it for businesses you no longer use — someone who has closed, or a subcontractor you have stopped working with. Their history stays attached to the jobs they worked on, which is what you want when an old job is queried. `Do not use` is worth writing in the **Note** before you archive, so nobody adds them again in six months.

11.3 Importing, merging and deleting

Bringing a supplier list in from Excel, exporting it, merging the duplicates that build up over time, and when a supplier can be deleted.

Tools for getting a supplier list into shape: **Import** for bulk entry, **Export** to take a copy, **Merge** for duplicates, and **Delete** for mistakes.



Merging joins duplicates without losing what is attached to either.

Importing from Excel

Import above the supplier list walks through the steps:

1. **Download the template** — a spreadsheet with the columns SmarteBuild recognises.
2. Fill it in, one supplier per row, starting at row 2.
3. **Upload** your file.
4. **Pick the worksheet** and check which of its columns holds each field.
5. **Choose the category** the new suppliers are filed under.
6. **Import**.

You do not have to use the template. Any spreadsheet works, because step 4 lets you point each field at whichever column holds it. The template simply saves you that work: its headings are recognised automatically, so the mapping arrives already filled in.

Only the supplier name is required

Every other field can be left as **(not mapped)**. A list with no ABNs, or no contact people, imports perfectly well — those fields are just left blank, and you can fill them in later. A row with a contact's name, phone or email also creates that contact.

Check the mapping before you import even when it looks right. If a heading is not recognised the field is left unmapped rather than guessed at, so an unexpected **(not mapped)** usually means a heading is spelled differently from what you expect.

A row whose supplier name is already in your list — or repeats an earlier row of the same file — is skipped rather than imported twice. The result tells you how many suppliers were created, and lists the rows that were skipped and why.

Before you import

Half an hour in the spreadsheet is worth a day of correcting records afterwards.

1. **Deduplicate.** Most existing lists carry the same business more than once.
2. **Standardise the names.** `Barwon Concrete`, `Barwon Concrete P/L` and `BARWON CONCRETE PTY LTD` will import as three suppliers.
3. **Sort them by trade**, and import each trade into its category.
4. **Check the emails.** An import is the easiest moment to fix them all at once.
5. **Drop the dead ones.** Businesses that have closed do not need importing.

> **Import a sample first** — Take ten rows, import them, and check how they landed before running the other four hundred. Catching a column mapping problem on ten records is a different task from catching it on four hundred.

Exporting

Export downloads the suppliers in the category you have selected — or all of them, with **All suppliers** selected — as an Excel file, with their contacts.

Merging duplicates

Merge combines two supplier records into one.

Duplicates accumulate no matter how careful you are — someone adds `Surf Coast Steel` while `Surf Coast Steel Pty Ltd` already exists, usually mid-job when they are in a hurry. The symptom is a supplier whose history looks thinner than you remember, because half of it is attached to the other record.

Open the supplier, click **Merge** and pick the other record — archived ones are included, since an old duplicate is the usual case. **Keep** chooses which record survives. Before anything happens you see exactly what moves across — orders, invoices, quotes, contacts, products, dates, ratings — and how clashes are settled:

- Where both have a value (a date, a rating, the Xero link), the kept record's wins.

- Where the kept record is blank (no ABN, no note), the other one's is used.

Merge and delete then moves everything and deletes the other record, all in one go: if anything goes wrong, nothing changes. A merge cannot be undone.

Only your own company's suppliers can be merged — not SmarteBuild's shared ones.

Before merging

1. **Confirm they are the same business.** `Smith Plumbing` and `Smith Plumbing Services` may be two genuinely different companies.
2. **Decide which record survives** — usually the one with the more complete details and the longer history.

Deleting

A supplier can only be deleted when nothing refers to it — no orders, invoices, quotes, products, defects or schedule tasks. Otherwise **Delete** tells you what uses it and offers **Archive instead**, which hides it and keeps its history. If it is a duplicate, merge it instead.

Deleting removes the supplier with its contacts, category filings, dates and certificates, and ratings.

A tidy-up worth doing once

If your list has grown organically for a few years:

1. Sort by name and read down it. Duplicates sit next to each other.
2. Merge them.
3. Archive anyone you have not used in two years.
4. File everyone remaining under their trades.
5. Check the contact emails on the twenty you use most.

An afternoon, and it makes every tender afterwards faster.

CHAPTER 12

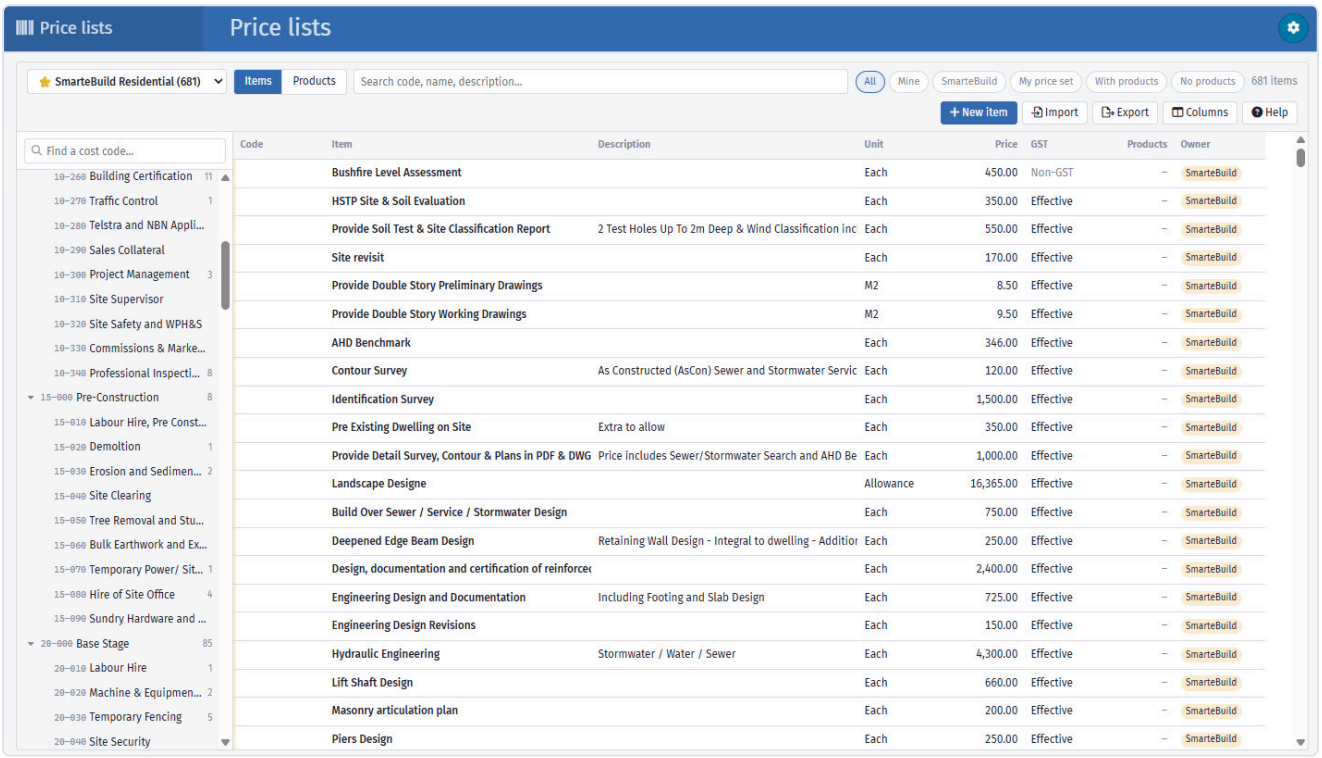
Price lists

12.1 What a price list is for

Why a maintained price list is the highest-leverage thing to set up, how it feeds the Bill of Quantities, and a tour of the Price lists page.

A price list is your rates — a structured set of descriptions, units and prices that BOQ items are built from.

It is the single highest-leverage thing to set up properly in SmarteBuild.



Your rates in one place, feeding every estimate you write.

Why

Three reasons, in increasing order of value.

Speed. An estimate built by importing from a price list takes a fraction of the time of one built line by line.

Consistency. The same work is worded and priced the same way on every job, so two jobs can be compared and a client cannot find two different prices for the same thing.

Updateability. Items imported from a price list keep a **Link to Pricelist**, so rates can be refreshed in bulk when prices move. An item typed by hand is invisible to every refresh, forever.

That third point is the one people underestimate. When concrete goes up 8%, a maintained price list means updating one rate. Without it, it means finding every concrete item on every live estimate.

The Price lists page

Open it from the pink **Price List** tile on any page. Everything to do with price lists — every list, its cost codes, its items and their supplier products — is on this one page.

Part of the page	What it does
Price list selector	Switches between your lists. A ⭐ marks a list supplied with SmarteBuild. The page remembers the one you used last.
Items / Products	Two views of the same list: the items themselves, or every supplier product linked to them.
Search	Matches code, name and description (or SKU, product and supplier in the Products view) as you type.
Filter chips	**All**, **Mine**, **SmarteBuild**, **My price set**, **With products**, **No products**.
Left pane	The list's cost codes, with item counts. Pick one to see its items and everything beneath it. The box above the tree finds a cost code by code or name — Enter picks the first match. The tree stays put when you switch views, so Products shows the products under the same cost code.
The grid	Sortable, resizable columns; **Columns** chooses which ones you see, per user.
The drawer	Click a row and its details slide in from the right, in tabs: **Details**, **Prices** (your own price and its history) and, for an item, **Products**. Drag its left edge to make it wider; the width is remembered.

Double-click a cell on one of your own items to edit it in place. Select several rows with Ctrl or Shift to act on them together, or drag them onto a cost code in the left pane to move them.

What an entry carries

Field	What it is
Code	Your item code
Item Name	Short name
Description	The full wording used on orders
Unit and **Price**	What the rate is per
GST	Effective or Non-GST
Cost code	Where it sits in the list's structure
Cost Type	What kind of cost it is
Factor	A multiplier applied to the rate
Note	Anything about the rate worth recording

Descriptions do double duty

A price list description ends up on purchase orders, so it has to be precise enough for a subcontractor to work from.

Weak	Better
`Concrete`	`N32 concrete, 80mm slump, supply and place to slab`
`Mesh`	`SL72 mesh, 40mm cover, laps 300mm min`
`Paint`	`Two coats low-sheen acrylic to internal walls, over sealer`

Write it once, properly, and every order you ever raise from it is unambiguous.

Lists supplied with SmarteBuild

Some lists, items and products come with SmarteBuild rather than being created by you. You can see them, filter to them with the **SmarteBuild** chip, import from them into a BOQ and record your own price against them — but you cannot edit or delete them, and the editing controls are hidden on them.

To make your own version of a shared item, create one in one of your own lists.

Where it is used

- **Creating an estimate** picks a default price list
- **Import from Price Lists** in the BOQ brings items in
- **Renew prices** refreshes linked items when rates change

See Adding items and Prices, markups and GST.

More than one list

Keep separate lists where the rates genuinely differ — renovation versus new build, or different regions.

Do not split by trade. That is what cost codes are for, and several lists covering one job means importing from all of them.

In this section

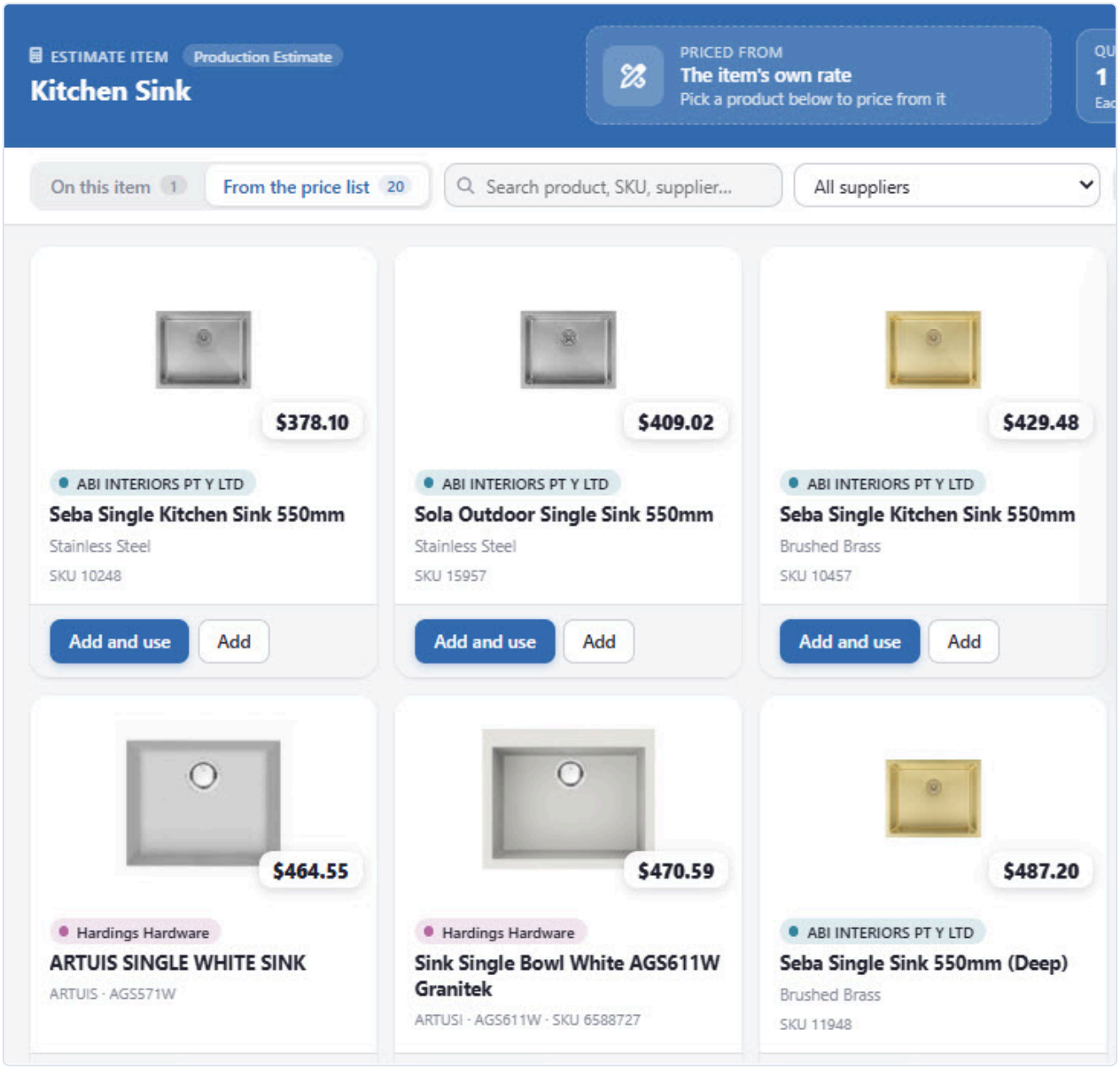
- Building a price list
- Cost codes and structure
- Products
- Keeping rates current

12.2 Building a price list

Adding and editing items, what Cost Type and Factor do, importing from Excel, exporting, and how to build a list without stopping work for a month.

New item creates an entry. **Import** brings many in at once from a spreadsheet.

> **Shared price lists are read-only** — Lists, items and products supplied with SmarteBuild can be seen and used but not changed. Their rows do not respond to double-click, the edit and delete controls are hidden on them, and **Import**, **New item** and **Structure** only work on your own lists. You can still record your own price against a shared item — see Keeping rates current.
>
> Where a shared item or product sits is SmarteBuild's too: you cannot move one to another cost code, take it out of the price list, or unlink a shared product from an item, because every company would see the change. **Duplicate** it instead — the copy belongs to your company, and you can rename it, price it, file it wherever you want and add your own products to it.



Each item carries its unit, its rate and the cost code it belongs under.

Adding an item

Pick the cost code in the left pane first, then **New item**. The item is created into that cost code; if you have not picked one, the form asks for it. An item needs a name, a unit and a cost code — everything else can wait.

Editing

Two ways, depending on how much you are changing.

In the grid. Double-click a cell on one of your own rows to edit it where it is — code, name, description, unit, price, GST and cost type all work this way. Enter saves, Escape cancels, Tab moves along the row. Prices are ex GST; if the figure you have is inc GST, type it and choose **Divide by 1 + GST** in the editor.

In the drawer. Click a row and use the pencil icon for the full form — factor, productivity, size, approval, note and everything above in one place. The drawer also shows the item's price history, its products and every list it is filed in.

Select several of your own rows with Ctrl or Shift and a bar appears along the bottom: **Delete**, set **GST**, and **Move to** a cost code. Dragging the selected rows onto a cost code in the left pane does the same move.

Sorting the list

Click a column heading to sort by it — code, item, description, unit, price, GST, products or owner. Click again to reverse it, a third time to go back to the list's own order. Prices sort as numbers, so $90 comes before $1,100, and **Owner** puts your own items before SmarteBuild's. Your choice is remembered next time. Dragging a column's right edge still just resizes it, and Shift selects the rows you can see between the two you clicked, whatever the order. The Products view sorts the same way.

The fields

Field	What it does
Code	Your item code — sorts the list
Item Name	Short name shown in pickers
Description	Full wording, used on purchase orders
Unit and **Price**	The rate and what it is per, ex GST
GST	Effective (GST applies) or Non-GST
Cost Type	What kind of cost it is — labour, material, subcontract, plant
Factor	A multiplier applied to the rate
Productivity	Output per unit of time, for labour-driven rates
Note	Where the rate came from, when it was checked

Cost Type

Separating labour, material, subcontract and plant is what lets you answer questions like "how much of this job is labour?" It also helps when costs move unevenly — material inflation and labour rates rarely move together.

Fill it in as you build the list. Adding it retrospectively across 800 entries is a job nobody does, which is why you can do it in bulk: select the items (click one, then `Ctrl`+click or `Shift`+click others), pick a type from **Cost type...** in the bar that appears, and press **Set**.

The **Cost type** column is in **Columns**, off until you turn it on. An item with no type says **Not set**. Items used to be saved as *Allowance* when nobody chose, so an older list full of Allowance usually just means "never sorted".

Estimates take the cost type from the price list item, so the Bill of Quantities can group and total by cost type.

Factor

A multiplier applied to the rate.

Useful where a base rate needs consistent adjustment — a regional loading, or a supplier discount off list. Change the factor and everything using it moves, without editing individual rates.

Where a rate is simply what it is, leave the factor alone. A factor nobody remembers setting is a confusing thing to inherit.

Importing from Excel

Switch to the list you are importing into, then **Import**. The dialog has three steps:

1. **Download the template** — a spreadsheet built from this list's cost codes and your units. It has one sheet, `PriceList`, with seven columns: Item Name, Description, Code, Unit, Price, GST and Cost Code. Fill it in, one item per row, starting at row 2. Delete the `e.g.` example row or leave it — the import skips it either way.
2. **Upload your file.**
3. **Map the columns** — pick the worksheet, then confirm which of its columns holds each field. The template arrives already mapped; any other spreadsheet works too, you just point each field at the right column.

Then **Import**. The dialog reports how many items were created, how many rows were skipped, and why.

The Unit, GST and Cost Code columns in the template have dropdowns built from your own data, so you are picking from your real cost codes and units rather than typing them.

Only Item Name and Cost Code are required

Everything else can be left as **(not mapped)**. An item does need a cost code, though — a row without one is skipped.

Cost codes must already exist. Unlike the BOQ import, this one will not create them: add them with **Structure** first. A row whose cost code is not in the selected list is skipped, and the result names the ones it could not find. The cost code can be written as its name or its code.

What the result tells you

A count of what was created, plus anything that needed attention: rows skipped for an unrecognised cost code or a price that was not a number, and items that came in with the default unit or as GST Effective because those cells were not recognised. Prices written as `$1,250.00` import fine.

Most builders already have rates in a spreadsheet, so this is usually how a list starts. Before importing:

1. **Standardise the descriptions.** This is the moment to write them properly — they end up on purchase orders.

2. **Set the units consistently.** `m2`, `sqm` and `m²` become three different units otherwise.
3. **Fill in Cost Type.** Much easier in a spreadsheet than one entry at a time.
4. **Remove anything you have not used in two years.**
5. **Import ten rows first** and check they land correctly before running the rest.

> **The import is the best moment to improve the descriptions** — You are already in a spreadsheet with all of them in front of you. Find-and-replace across 400 descriptions takes minutes; editing them one at a time in the application afterwards takes a week and never happens.

Exporting

Export produces an Excel workbook of the list you are looking at, in the order the screen shows it. It has two sheets:

- **PriceList** — every item with its cost code, unit, price, GST and cost type, plus whether the price is one you set yourself (and the list price behind it), who owns the item, and how many products it has.
- **Products** — every supplier product on those items: supplier, SKU, manufacturer, price, category and whether it is superseded.

Prices are the ones that apply to you, so where you have recorded your own price on a SmarteBuild item the export shows yours. The first seven columns of the PriceList sheet are the import template's columns in the same order, so you can edit an export and import it straight back into another list.

It is the quickest way to hand rates to someone for review, or to build one list from another.

Building it without stopping work

Nobody has a spare month. The way this actually gets built:

Start with your next job. As you price it, add each item to the price list rather than typing it into the estimate. The job takes slightly longer; the list starts existing.

Do the same on the next two jobs. By the third, most of what you price regularly is in there, and jobs are getting faster rather than slower.

Then fill the gaps — the trades you have not happened to price yet.

Three jobs, and you have a working list that was built from real work rather than from a blank sheet.

What not to put in

Rates you will never reuse. A one-off allowance for something unique to one job belongs on that estimate, typed, not in the list.

A price list of 2,000 entries where 300 are used is harder to work with than a list of 300. Keep it to what recurs.

Notes

Record where a rate came from and when it was checked:

> *From Barwon Concrete schedule, Feb 2026. Includes pump for pours over 15m³.*

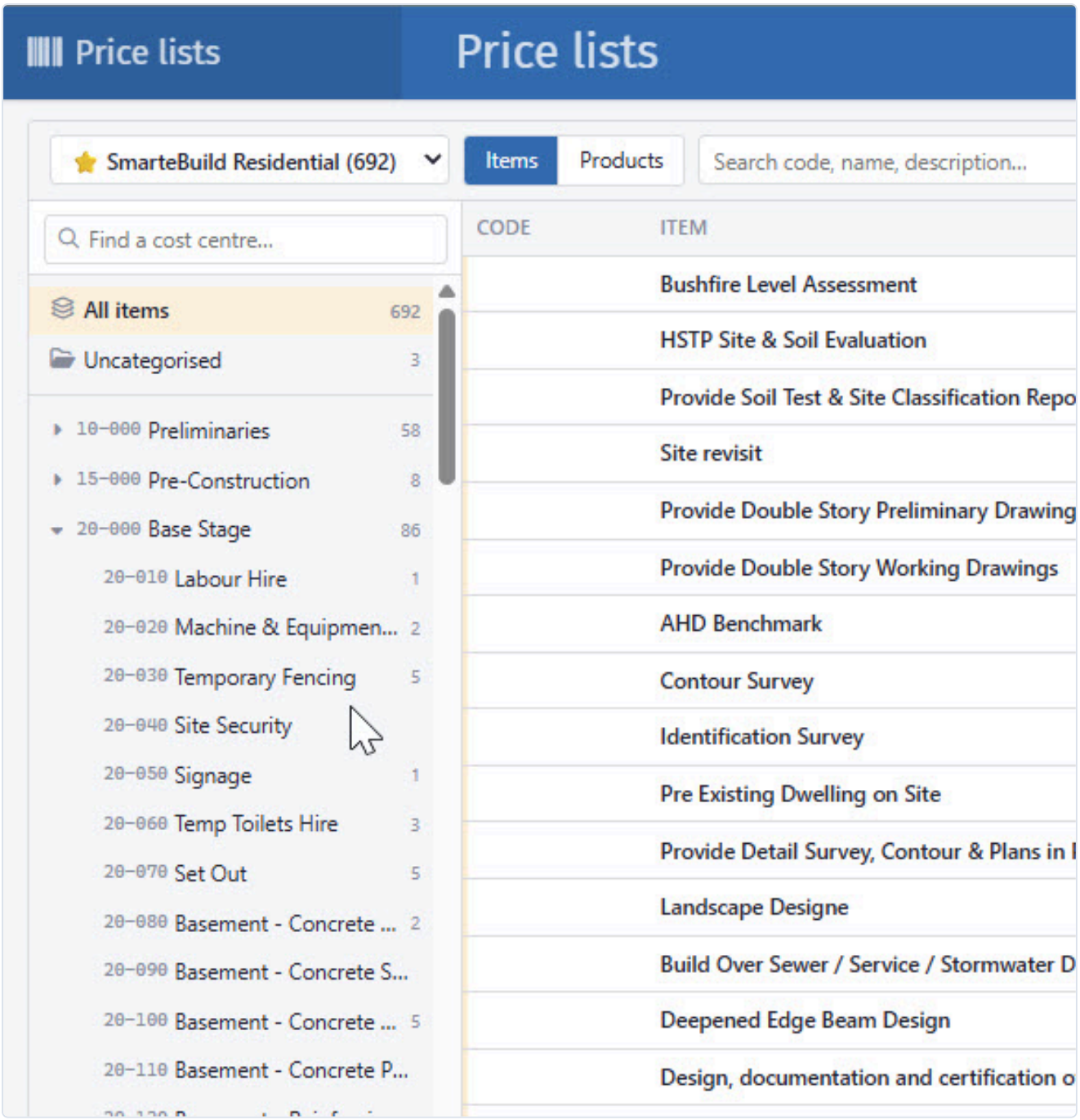
Six months later that answers whether the rate is current and what it covers. See Keeping rates current.

12.3 Cost codes and structure

Organising a price list so entries can be found, filing items, and why the structure should follow your cost codes.

Every price list has a structure of cost codes, shown in the left pane of the Price lists page. Items are filed under them, and picking one shows its items and everything beneath it. On a long list, type part of a code or name in the box above the tree to jump to a cost code — the matches show with their parents for context, and Enter selects the first one.

The structure itself is edited on the Structure screen — **Structure** in the toolbar opens it for the list you are looking at. That is where you add, rename, nest and remove cost codes.



Categories decide where an item lands when you import it.

Filing items

An item lives in one cost code per list. To move it:

- **Drag** the row (or several selected rows) onto a cost code in the left pane.
- Select rows and use **Move to** in the bar at the bottom.
- In the drawer's **Details** tab, under **Filed under**, use the pencil beside the list to change the cost code.

The same drawer section can file an item in **another** of your lists — **Add to a price list** — or take it out of one. An item taken out of its last list shows under **Uncategorised** at the top of the left pane, which is also where anything that has never been filed turns up. Nothing there appears in a BOQ import, so it is worth clearing.

Follow your cost codes

The structure should mirror your cost code structure.

Same names, same order, ideally the same codes:

```
100  Preliminaries
200  Site works
300  Concrete
310    Slab
320    Driveway and paths
400  Framing
500  Roofing
...
```

Two reasons this matters.

Importing is faster. Pricing the concrete cost code means opening the concrete category — no translation between two different organising schemes.

Nothing gets lost in translation. When the two structures diverge, people import items into whatever category looks closest, and the bill ends up coded inconsistently.

> **One structure, used everywhere** — Your cost codes, your price list structure and your tender packages should all follow the same breakdown. It is one thing to learn instead of three, and everything lines up without anyone mapping between them.

Depth

> **Three levels, and no deeper** — A cost code can have children, and those children can have children — but no further. If a change would make a fourth level, SmarteBuild refuses it and tells you why. Adding, dragging, changing **Parent** and importing from Excel all apply the same rule, in price list and cost code structures alike.

Two levels covers most residential work. Three is occasionally justified on commercial. Where you want a fourth, an extra digit in the code usually reads better anyway: `310 Slab`, `311 Slab – excavation`.

You will rarely want the depth in any case. Finding an entry by expanding three levels is slower than filtering a flat list, and search and the filter chips do most of the finding — the tree is for browsing, not for searching.

Codes

Number cost codes the same way as your cost codes, in gaps of 100.

Leaving room means adding `330 Retaining walls` in three years without renumbering anything, and the order still comes out right.

Deleting a cost code

Move the items out first — the counts beside each cost code show what is in it. Items left in a deleted cost code end up under **Uncategorised**, which takes longer to sort out than moving them beforehand.

When your cost codes change

If you restructure your cost codes, restructure the price list to match, at the same time.

The two drifting apart is the usual failure. It happens gradually, nobody notices, and six months later importing is slower than it used to be and nobody can say why.

A structure to start from

For residential building:

Code	Cost code
100	Preliminaries
200	Site works
300	Concrete
400	Framing
500	Roofing
600	External cladding
700	Windows and doors
800	Services
900	Internal linings
1000	Fixing and joinery
1100	Wet areas
1200	Painting
1300	Floor coverings
1400	External works
1500	Final clean and handover

Add children where you genuinely price things separately — `310 Slab` and `320 Driveway` under Concrete, `810 Plumbing` and `820 Electrical` under Services.

Use the same list for your cost codes and you have set up both at once.

Product categories are a different thing

Supplier products have their own small categories — a way of grouping the products linked to one item from one supplier, such as *Cement* and *Aggregate* under a concrete item. They are managed on the product

form, not here. See Products.

12.4 Products

Supplier products - specific items with part numbers, suppliers, pictures and their own price history - and why they matter on purchase orders and selections.

A **product** is a specific thing you buy: a particular tap, a particular tile, a particular window. Where a price list item is *"chrome basin mixer"*, a product is *that* mixer, with its part number and its supplier.

Products hang off price list items. Each item can have any number of them, and a product can be linked to more than one item.

Two ways to see them

Under the item. Click an item and the drawer's **Products** tab lists its products, with **Add product** to create one against it.

The Products view. The **Products** switch at the top of the page shows the products on every item under the cost code you have selected — pick **All items** for the whole list. A supplier dropdown in the toolbar narrows it to one supplier, with counts, or to **Not linked to an item** for products no item uses. Search matches SKU, product and supplier. Double-click a cell on one of your own products to edit it in place; click a row for its drawer. **Columns** adds Finish, Colour, Material, Profile and Size to the grid, and they edit in place like the rest.

Group by item is on by default: the rows sit under the price list item each one is filed under, in alphabetical order, with a count on each band and products filed under no item at the bottom. Click a band to fold that item away. Turn the button off for one flat list. The setting is remembered, and selecting a range with Shift picks the rows you can see between the two you clicked.

Click a column heading to sort by it — supplier, SKU, product, price, category, price list item, or any column you have added. Click again to reverse it, a third time to go back to the list's own order. Grouped, the sort runs inside each band **and** orders the bands themselves, so sorting by price puts the dearest item at the top with its dearest product first. Your choice of column is remembered. Dragging a column's right edge still resizes it and leaves the sort alone.

A product filed under more than one item is listed once, under the first of them — the same one the **Item** column has always shown. To see everything that is filed under an item, open the item and use its **Products** tab.

The fields

Field	What it is
Product	What the product is
Description	The fuller wording
Supplier	Who you buy it from
SKU	The supplier's part number
Manufacturer / **Manufacturer code**	Who makes it, and their code
Price	What it costs — ex GST; tick **inc GST** if the figure you are typing includes it
Price list item	The item it belongs to
Category	An optional grouping among that item's products from that supplier
Finish, **Colour**, **Material**, **Profile**	The variant details that tell one product from its near-identical siblings - they also feed colour selections
Size	The product's size, where it matters
Product URL	Link to the supplier's page
Note	Anything worth recording
Superseded	Marks a product the supplier has replaced, without deleting the history

Why the SKU matters

It prints on the purchase order.

A supplier receiving a part number does not have to interpret your description, which is where substitutions and wrong deliveries come from. It matters most on anything with variants — tapware, tiles, hardware, appliances, anything with a finish or colour.

"Chrome mixer" is not an order. A SKU is.

Pictures and URLs

A picture and a URL are what make a selections schedule work.

A client choosing tapware wants to see it. Attach the picture once and every colour selection schedule from then on shows it; the URL lets them look at the supplier's own page for the detail.

In the product's drawer, under **Details**, the **Picture** section has **Upload** for a file from your computer and **From web address** to fetch one from a link. **Remove** takes it off again. Pictures count towards your company's storage.

> **Pictures earn their keep in selections** — The time to add a picture is when you add the product, not when a client asks what something looks like. It is a minute per product and it turns the selections process from a series of phone calls into a document the client works through themselves.

Adding, linking and duplicating

New product in the Products view, or **Add product** in an item's drawer, creates one. The form asks for the supplier and the price list item; start typing in the item box to find it.

From a product's drawer:

- **Link** attaches it to another item as well, so the same tap can sit under two items without being entered twice. The **Linked to** section lists every item it is on, each with an unlink icon.
- **Duplicate** copies it, which is the fast way to add a variant — the same tap in a different finish. It is also how you take on a product SmarteBuild supplies: the copy belongs to your company, so you can price it, rename it and file it where you like.
- **Edit** and **Delete** do what they say. Deleting a product removes it from every item it is linked to.

Select several products and the bar at the bottom can mark them **Superseded** or **Current**, **Unlink** them from the item you are looking at, or **Delete** them.

Editing a whole list at once

When an item carries a dozen products, opening each one to change a price is slow. **Edit all** on the item's **Products** tab opens every product of that item in one grid, with a column for each field: product, supplier, SKU, description, price, manufacturer and code, finish, colour, material, profile, size and superseded.

- Type straight into any cell. Changed cells are highlighted, and the button at the bottom counts what you have changed — **Save 6** saves those six products in one go.
- **Search** and the **supplier** dropdown narrow a long list; the dropdown offers only the suppliers that item actually has, with how many each one carries.
- **Click a column heading** to sort by it, and again to reverse it.
- Searching or filtering never loses an edit. A changed row the filter is hiding is still saved, and the footer says so — *3 products changed (1 not shown)*.
- **Enter** jumps down the same column, so a price list can be priced top to bottom without reaching for the mouse.
- Tick **Prices I type include GST** and every price you type in that grid is the GST-inclusive one; SmarteBuild stores the price without GST, as everywhere else.
- Products SmarteBuild shares with every company are shown with a padlock and cannot be changed, the same as anywhere else.
- Nothing is saved until you press Save, and a price change is added to that product's price history exactly as it is when you edit one product.

Categories

Products linked to one item from one supplier can be grouped — *Cement*, *Aggregate* and *Additives* under a concrete item, say. The **Category** box on the product form lists the ones that exist for that item and

supplier; type a name beside it and **Add** to create one, or use the pencil and bin icons to rename or delete the selected one. Deleting a category leaves its products uncategorised; it does not delete them.

Most products do not need a category. Use them where one item has a dozen products from the same supplier and the list is getting hard to read.

Your own price on a product

Products supplied with SmarteBuild are read-only, but you can record your own price against one exactly as you can for an item — the drawer's **Prices** tab keeps the history. See Keeping rates current.

Products on BOQ items

An item can name the product it was priced with, so the purchase order carries the part number. See Suppliers and products.

Housekeeping

Two commands worth knowing, from the BOQ's Items menu:

- **Remove all unused products** clears products no item on that estimate refers to. Worth running after heavy editing — orphaned products clutter the pickers without affecting any price.
- **Export all products** produces the buying list for a job, which is useful for a supplier who wants to quote the package rather than line by line.

On the Price lists page, the **Not linked** entry in the Products view is the equivalent check for the list itself.

What to put in

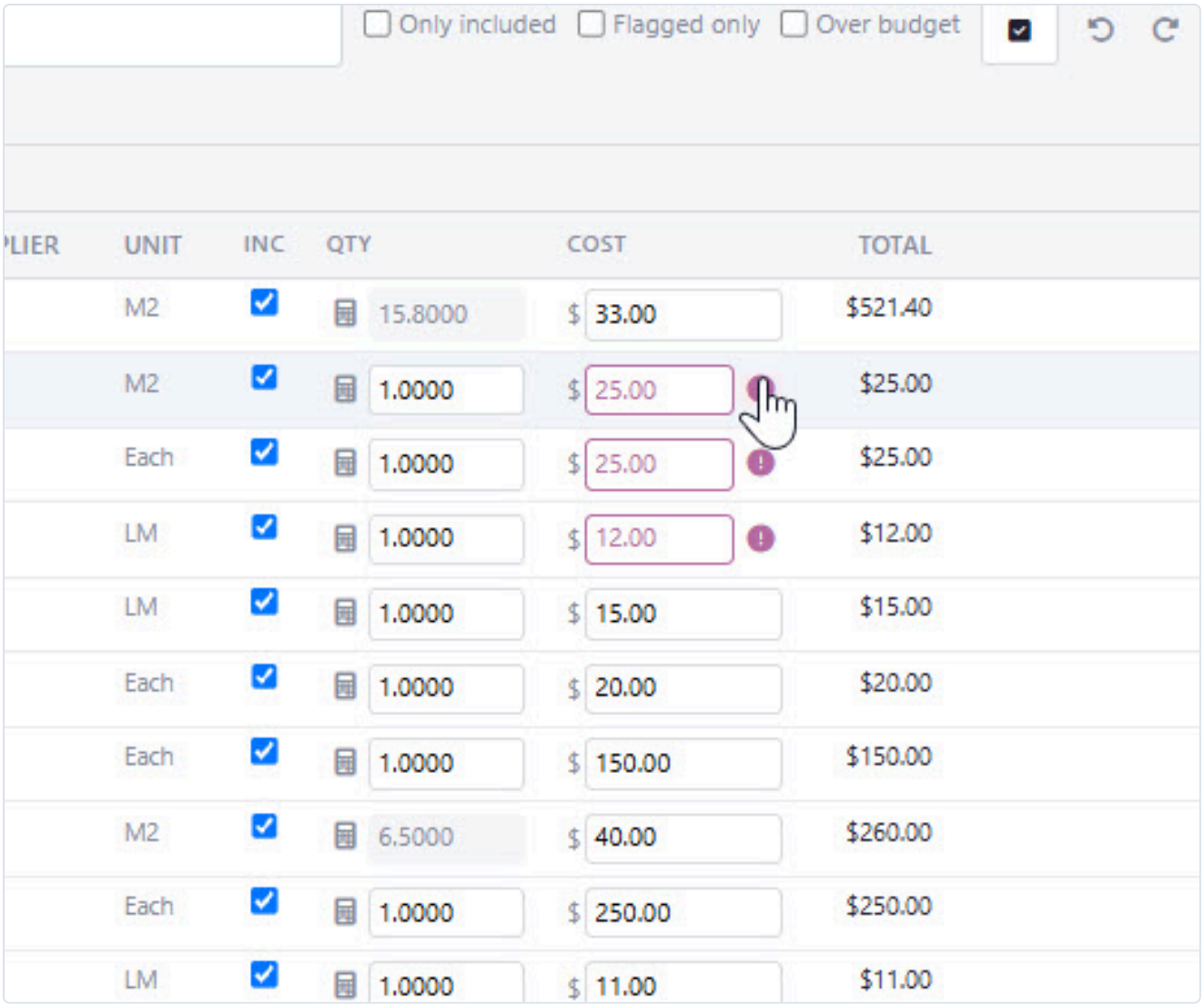
Products you specify repeatedly. Your standard tapware range, the tiles you use, the door hardware, the appliances you offer as standard.

A one-off product a client found themselves does not need to be here — put it on the BOQ item and move on. Products are for what recurs.

12.5 Keeping rates current

Refreshing prices in bulk, using your own cost history to correct rates, and the one thing never to do on a submitted tender.

A price list is only worth what its rates are worth. Keeping them current is what separates a useful list from a stale one that makes estimates confidently wrong.



The alert tells you which rates have moved since you last estimated.

Refreshing rates

A BOQ never changes price underneath you. When the price list moves, the item shows a price alert in the grid, and the BOQ ribbon's **Renew** opens a window listing every item whose price has moved, with the old and new price and what renewing does to the job's total. You tick the ones to take, and can undo straight afterwards. See Prices, markups and GST.

> **Never renew prices on a submitted tender** — Refreshing rates on an estimate you have already quoted changes what the job says it costs, and your submitted price no longer matches your bill. If you want to see what current rates would do, duplicate the estimate and update the copy.

Only linked items update

Items carrying a **Link to Pricelist** are the ones a refresh can reach. Rates typed by hand are invisible to every refresh, forever.

That is the practical argument for building estimates from the price list rather than typing: not the speed, but the fact that typed rates never get updated again.

Where updated rates come from

Supplier schedules. Most suppliers issue updated rates periodically. Update the list when they arrive rather than filing them.

Tender results. A trade you tendered three times this year has three real market prices. That is better information than any published rate.

Your own actual costs. The most valuable source, and the one nobody uses.

Your own price on a SmarteBuild item

Items and products supplied with SmarteBuild are read-only — you cannot change their price. You can, however, record **your own price** for one, and that is the price you see and the price a BOQ import uses, without the shared item changing for anyone else.

Click the item and open the drawer's **Prices** tab. It shows the SmarteBuild price, lets you enter yours with **Set** (tick **inc GST** inside the price box if the figure you typed includes GST), and keeps a history of every price you have set, with who set it and from when. The **My price set** filter chip lists every item you have done this on, and the grid shows the price that applies to you with a "Yours" mark where it is your own.

- **From** defaults to today. Set a future date to schedule a change — it shows in the list as pending and takes effect on that day.
- Remove a price to fall back to the one before it, or to the SmarteBuild price if there is none.
- Your price applies to your whole company group, not just the user who set it.

The same tab appears on your own items and on products, where it is simply a direct view of the price history that editing the price already writes. A dot on the tab means you have a price of your own on that row.

> **Existing estimates keep the price they were built with** — Your price reaches **new** imports into a BOQ. Items already sitting in an estimate are not changed until you renew them: the BOQ's price alert and **Renew** window then offer your price, not the SmarteBuild one.

Using your own cost history

You have the data. Every finished job holds allowed, committed and actual cost per item — see Cost to date against budget.

A trade that ran over on three jobs running is not bad luck. It is a rate that needs changing.

Worked example

Three completed jobs, concrete slab items:

Job	Allowed	Actual	Variance
18 Beach Road	$8,154	$8,612	+5.6%
42 Ridge Street	$11,400	$12,090	+6.1%
Lot 118 Aspen	$9,800	$10,240	+4.5%

Consistently 5% light. That is not three unlucky pours — the rate is wrong, or the allowance for waiting time and part-loads is missing.

Raise the concrete rate about 5%, or add a line for the extras. Either way the next estimate is right, and it was your own jobs that told you.

A review routine

Once a quarter:

1. Update from any supplier schedules received.
2. Look at completed jobs for trades that consistently ran over.
3. Adjust those rates.
4. Check the rates you use most — the top twenty by frequency.
5. Note in each entry when you checked it.

An hour, four times a year.

Note when a rate was checked

In the entry's **Note**:

> *Checked Feb 2026 against Barwon schedule. Includes pump for pours over 15m³.*

Six months later, that answers whether the rate is current and what it covers. A rate with no date is one nobody trusts and everybody re-checks.

Rates that should not be refreshed

Some should stay fixed:

- A rate from a **quote you accepted** — that is the agreed price, not a list price
- A rate you **deliberately adjusted** for a job's particular circumstances
- Anything on an **estimate you have submitted**

Where you have adjusted a rate on purpose, note why on the item. Otherwise someone refreshing the estimate later will helpfully undo your decision.

PART III

Estimating

From the drawings to a priced estimate you can stand behind.

13 Estimating
14 Projects and estimates
15 Documents
16 Take-Off
17 Cost codes
18 The Bill of Quantities

CHAPTER 13

Estimating

Projects and estimates, documents, take-off, cost codes and the Bill of Quantities - everything involved in pricing a job.

Estimating is where a set of drawings becomes a priced job. Five modules do the work, and they are meant to be used in this order.

How a quantity travels

This is the chain that makes the estimating side worth using:

A measurement on a drawing → a take-off field → a BOQ item's quantity → the item's cost → the estimate total

Change anything on the left and everything to the right of it follows, live. There is no recalculation step.

Projects and estimates

The job itself, and the priced versions of it. A project holds the client, the site, the contract stages and the documents; an estimate holds one priced version — its own Bill of Quantities, take-off and markups.

- Overview
- Creating a project
- Estimates and templates
- Project Details and permissions
- Clients
- Markups
- Contract stages
- Organising your projects
- Archiving and deleting

Documents

The drawing register. Take-Off reads its PDFs from here, and revisions are managed here — so when Rev C arrives it supersedes Rev B rather than sitting beside it as another file.

- The document register
- Uploading and organising
- Versions and revisions
- Auto-attaching to bids and orders

Take-Off

Measuring quantities straight off the PDF drawings — counts, lengths and areas — into **take-off fields** that BOQ items can be priced against.

- What Take-Off is, and your first measurement
- Setting the scale
- The measurement tools
- Take-off fields and the BOQ
- Drawings, revisions and export
- Keyboard reference and troubleshooting

Cost Codes

The trade breakdown you cost against. Most builders use the same structure on every job and reuse it.

- What cost codes are for
- Building your structure
- Work Breakdown Structures
- Reusing a structure

Bill of Quantities

The priced estimate, and the spine of everything downstream. Orders, claims and variations are all raised against BOQ items, so the BOQ is worth understanding properly even if someone else builds it.

- The Bill of Quantities explained
- Adding items
- Getting a quantity
- Fields, items, formulas and calc sheets
- Formula fields
- Prices, markups and GST
- Suppliers and products
- Organising items
- Bulk operations
- Specification
- Reports
- BOQ settings

Where to start

If you are pricing your first job in SmarteBuild, work through Your first project, end to end. It builds all five of these in the right order on a real example.

CHAPTER 14

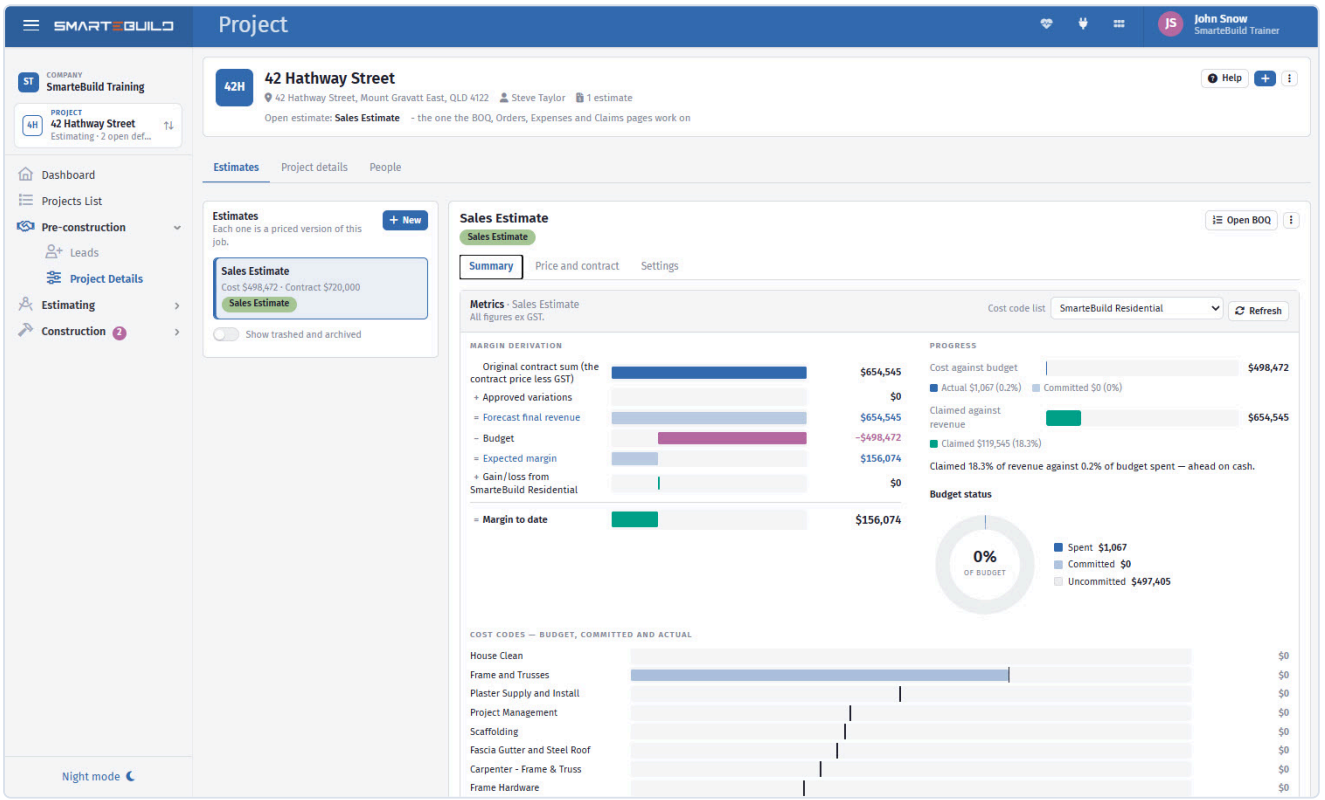
Projects and estimates

14.1 Projects and estimates

What a project is, what an estimate is, and how the Projects list is laid out.

A **project** is one job. An **estimate** is one priced version of that job. Every number in SmarteBuild hangs off that distinction, so it is worth being clear on it before you create anything.

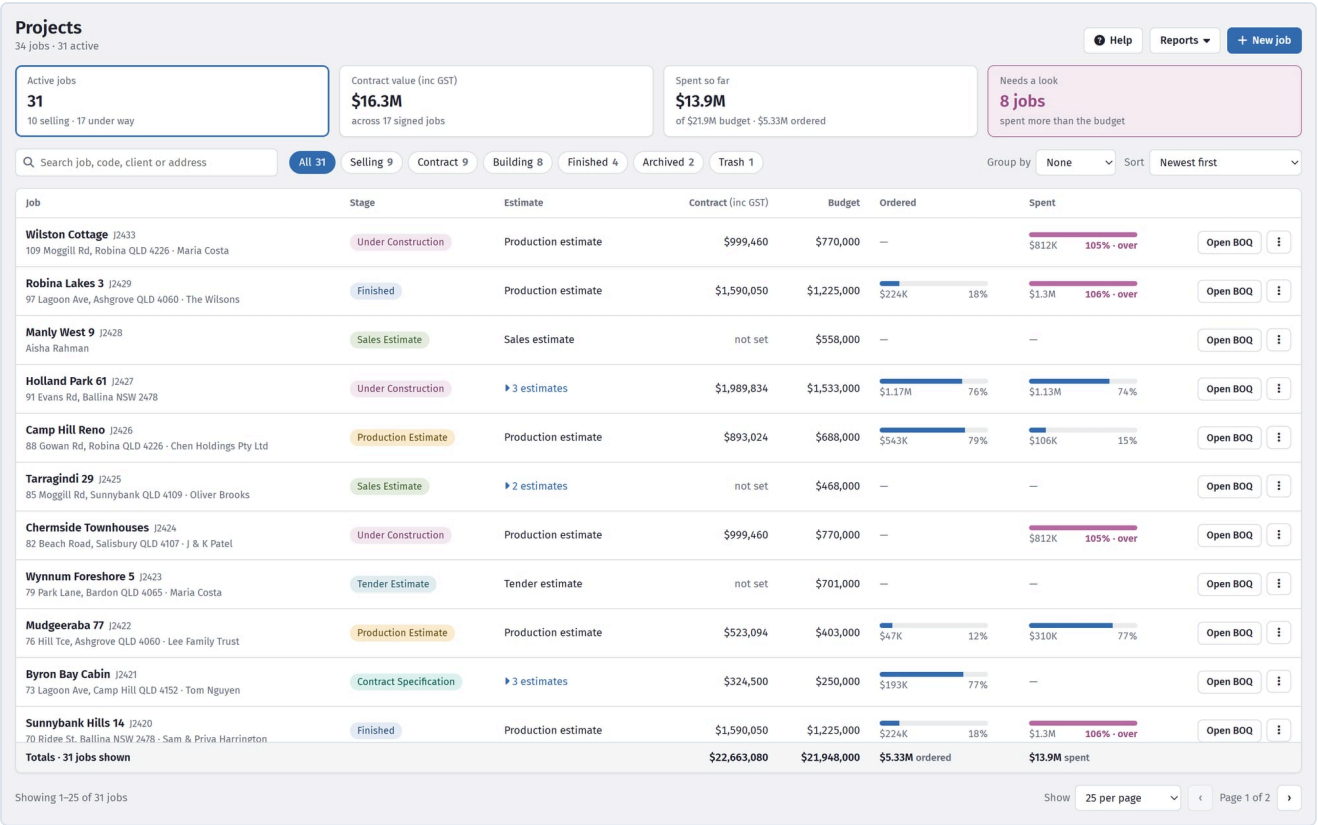
If it is new to you, read Company, project, estimate first — this article assumes it.



A project holds the client and the site; the estimates under it hold the money.

The Projects list

Projects is where you land. **One row per job** — not a row per estimate — so a job you have priced four times is still one line.



One row per job, with what is committed and spent against each budget.

Each row carries the job name and code, with the site address and client underneath, then:

On the row	What it tells you
Stage	Selling, Contract, Building or Finished
Estimate	The main one. Where there are others, *"3 estimates"* opens them in place
Contract	The contract price, **inc GST**
Budget	What the main estimate allows
Ordered and **Spent**	Two bars against that budget. A bar turns **pink** once it passes it

Click the row to open the job. **Open BOQ** goes straight to the main estimate's bill.

Which estimate the row is showing

The **main** estimate is the one furthest along — Finished, then Under construction, Production, Contract specification, Tender, Sales. If two are at the same stage, the newest wins. It is marked **Main** when you open the estimates out.

The money on the row is that one estimate's. The others are alternatives — a sales version, a revision, an option the client did not take — so they are deliberately not added together. Adding them would count the same house twice and make your pipeline look about double what it is.

The stage chips

All, **Selling** (sales and tender), **Contract** (contract specification and production), **Building** (under construction), **Finished**, **Archived** and **Trash**.

Sales estimates are no longer hidden. A job you have quoted and not won is still a job you spent time on, and it now sits in **Selling** where you can see it.

The four tiles

Active jobs, **Contract value (inc GST)** across signed jobs, **Spent so far** against budget with what is ordered, and **Needs a look** — jobs whose spending has passed the budget. Click that one to show only those.

> **The tiles ignore the filters** — They always count every active job, whatever the chips and search are showing. That is deliberate: the tiles are the state of the business, not the state of your current filter, and a number that moved every time you searched would be no use at all.

Finding a job

Search looks in the job name, code, address, client, grouping and estimate names — so the street name or the client's surname finds it.

Group by puts jobs under headings with subtotals: **None**, or any grouping you use, such as Region. This replaces the old heading pop-up.

Sort offers newest, oldest, name, job code, biggest budget, and most spent as a percentage of budget. That last one is the one to reach for when you want the jobs in trouble at the top.

The ⋮ menu

Open job, **Open BOQ**, **New estimate on this job**, **Duplicate** the main estimate, **Archive job** or **Restore from the archive**, and **Move to trash** or **Restore from the trash**.

Across the top: **Help**, **Reports** — the Budget report, the Work in progress report, and **Export every estimate to Excel**, which still carries all the old columns including area and rates — and **New job**.

Two things that changed

The totals keep themselves up to date. The two Refresh buttons are gone; you no longer have to remember to press anything to trust the numbers.

View-only access now shows up. A job you can see but not change appears in the list marked **View only**, rather than being missing and looking like it was deleted.

On a phone the same list arrives as cards.

> **The old page, for one release** — A link at the bottom opens the previous Projects list if you need it while you settle in. It goes away in the release after this one.

Opening a project shows its estimates. Click one to open it, and the **Metrics** panel underneath shows how its margin is built up, cost against budget, claimed against revenue, how much of the budget is spent or committed, and which cost codes are furthest over or under. All of it is ex GST. That panel is the fastest read on whether a job is going well.

Creating things

The + button at the top right of the project creates either:

- **New project** — a new job.
- **New estimate on this project** — a new priced version of the project that is open.

You need a project before you can have an estimate, so on an empty account the page shows a single **New project** button. Straight after you create a project, the new-estimate form opens so you can add its first estimate.

The project page

The top of the page shows the job: its name, site address, main client, where it is filed, and how many estimates it has. Below that are three tabs, one for each level:

Tab	What it holds
Estimates	The job's estimates on the left; the one you open on the right, with its own sections
Project details	Name, code, site address and GST; where the job is filed; its clients and their client-portal links
People	Who can open the job and each of its estimates, in one table

An open estimate

Click an estimate in the list to open it. The estimate you open here is the one the BOQ, Orders, Expenses and Claims pages work on, and **Open BOQ** takes you straight to its Bill of Quantities. Everything in the right-hand box belongs to that estimate:

Section	What it holds
Summary	Its margin, spend against budget, claims against the contract, and the cost codes furthest over or under — all ex GST
Price and contract	What it costs, the markups on top, the contract price (inc GST) and the stages it is claimed in
Settings	Its name, status, supervisor and house size, and which cost code lists it uses

> **Shared by every project** — Cost code lists (under an estimate's **Settings**) and groupings (under **Project details**) are your company's, not this job's. Creating, renaming or deleting one is behind **Manage lists** / **Manage groupings**, and changes it for every project.

Old links keep working: `Projects.aspx?T=3` still opens the markups and contract stages, now under **Price and contract**.

> **The classic page** — For one release the previous version of this page is still there. The link at the bottom of the page, **Use the classic Projects page**, opens it. Both save to the same place.

What you can do to a project

Action	What happens
Archive	Hidden from the default list, fully recoverable. Use it for finished jobs.
Trash	Marked deleted and hidden, still recoverable.
Delete Permanently	Gone, with everything under it.

These are in the ⋮ menu on the **Project details** panel (Project details tab). The open estimate has its own ⋮ menu: **Edit details**, **Duplicate**, **Move to trash** (or **Restore from trash**) and **Delete permanently**.

> **Delete Permanently is not recoverable** — Deleting a project takes its estimates, its Bill of Quantities, its take-off measurements and its orders with it. To make sure it is the right one, you type its name before the button works. Archive is almost always what you actually want — it removes the job from your list without destroying the record.

To see archived projects again, tick **Show Archived** in the project filters. For estimates, switch on **Show trashed and archived** under the list of estimates.

In this section

- Creating a project
- Project Details
- Estimates and templates
- Clients
- Markups
- Contract stages
- Organising your projects
- Archiving and deleting

14.2 Creating a project

Every field on a new project, what it is used for downstream, and which ones are worth getting right first time.

From **Projects List**, choose **New → Project**.

Most of these fields are optional, but several feed things much further down the line — reports, claims, call-up sheets — so it is worth knowing which ones matter before you skip them.

The fields

Field	What it is for
Name	How the job appears everywhere. Use something you would say out loud.
Code	Your job number. Appears on orders and reports.
Find the site address	Start typing the address and pick it from Google's list — the four fields below fill themselves in.
Street address	Number and street, with the unit or lot if there is one: `3/15 Smith Street`, `Lot 320, 15 Lanning Way`.
Suburb / State / Postcode	Where the site is. Prints on purchase orders, and the **postcode** is where the weather on the Schedule, Bookings and Site Diary comes from.
Client Full Name	The client on the contract. See Clients.
Email / Phone	The client's contact details.
Job Status	Where the job is up to — drives the status filter on the list.
Supervisor	Who is running it. Filterable, and used on site paperwork.
House Size	Floor area, for rate-per-square-metre reporting.
Contract Price	The agreed contract sum. Progress claims measure against it.
GST (%)	The GST rate applied to this job.
This project belongs to	Its place in the EPS — see Organising your projects.

The ones worth getting right

Code. This is your job number and it ends up on every purchase order you send. Changing it later does not retrospectively change documents already issued, so agree the numbering convention with whoever does your accounts before the first job goes in.

Address. It prints on purchase orders. A blank address means a subcontractor gets an order with no site on it, and you get a phone call.

Fill in the **postcode** too. It is what places the job for the forecast on the Schedule and Bookings, and for the weather recorded in the Site Diary — without it, there is nowhere to look. If you don't see the **Find the site address** box, type the four fields in yourself; they work the same either way.

Contract Price and GST. Progress claims and the estimate metrics both measure against the contract price. Leaving it at zero does not stop you estimating, but the claimed-against-revenue figures will be meaningless until you fill it in.

House Size. Only used for `$/m²` reporting. Skip it and those reports come out blank; it is not used in any calculation that affects a price.

> **Name it the way you will search for it** — The list is long after a year. `18 Beach Road — Rear Extension` is findable; `Hendricks job` is not, and neither is `Project 4`. Include the street number if you build in estates where twenty jobs share a street name.

Worked example

Creating the job used throughout this help centre:

Field	Value
Name	`18 Beach Road — Rear Extension`
Code	`2026-041`
Street address	`18 Beach Road`
Suburb	`Torquay`
State	`VIC`
Postcode	`3228`
Client Full Name	`A & J Hendricks`
Job Status	`Estimating`
Supervisor	`Dave Marsh`
House Size	`54`
Contract Price	leave at 0 until the tender is submitted
GST (%)	`10`

Contract Price stays at zero deliberately. You do not have one yet — you are about to work it out. Come back and fill it in when the job is won.

What happens next

A project on its own holds no prices. The next step is always an estimate:

New → Estimate — see Estimates and templates.

14.3 Estimates and templates

Creating an estimate, choosing its price list and WBS, duplicating one to price an alternative, and saving an estimate as a reusable template.

An estimate is one priced version of a job. It owns the Bill of Quantities, the take-off, the cost codes and the markups. A project can carry as many as you need, and they do not interfere with each other.

Creating an estimate

With the project open, choose **New** above the list of estimates (or **+** → **New estimate on this project** at the top of the page).

Field	What it does
Estimate name	How you tell this version from the others
Code, **House size**, **Contract price**	Optional now; the contract price is inc GST
Job status, **Supervisor**	Where the job is up to, and who runs it
Start from	**A blank estimate**, **A template** (type to filter the list), or **A price list** (builds the BOQ from every item in it)
Make this estimate a template	Makes this estimate available to copy from later

Starting from a big template can take a few seconds; the button says **Creating...** until it is done. The new estimate opens straight away. Cost code lists set to switch on for every new estimate are switched on for it automatically.

The field hint on the name suggests `Production Estimate` or `Sales Estimate`, and that is the idea — name the estimate after **what it is for**, not what number it is.

> **Name estimates after their purpose** — `Tender – Rev A` and `Tender – Rev B (reduced spec)` tell you which is which in six months. `Estimate 1` and `Estimate 2` do not, and you will open both to find out.

Choosing a price list

The price list you pick decides which rates are offered when you build items. You can still type a rate by hand or take one from a different supplier, but the default drives most of the work.

Pick the price list that matches the kind of job. If you keep separate lists for renovation rates and new-build rates, choosing the wrong one at this point means correcting rates item by item later.

Why you would have several estimates

Situation	How to handle it
Client wants a cheaper option	Duplicate, downgrade the finishes, compare
Tender revision issued	Duplicate, update to the new drawings, keep the original
Two build methods	One framed, one steel, priced side by side
Budget vs contract	Keep the early budget alongside the signed version

Duplicating an estimate

Open the estimate, then choose **Duplicate** in its ⋮ menu. The copy is called "Copy of" the original and opens straight away.

The copy carries across:

- the cost code structure
- every BOQ item, with its quantities, rates and markups — including formula-driven quantities, which arrive already calculated

  :::note[An older copy showing 0 on a formula line] Copies made before this was fixed can show **0** on their formula-driven lines, which also leaves the estimate total short by them. Press **Refresh Formulas** on the BOQ toolbar once and they recalculate. If a line still reads 0 afterwards, its formula is reading a measurement that did not come across with the copy — open that item's **Calculate Quantity** screen and re-measure it. :::

- the specification
- the colour selection schedule — its categories with their allowances, its rooms, the item list, the notes and the products that were selected

It does **not** carry across:

- **take-off measurements** — those stay with the estimate they were made in
- orders, claims, variations and expenses raised against the original
- **the decisions people made on the original schedule** — client confirmations, admin approvals, rejections, the comment threads and anything already pushed into the original estimate

> **Why take-off does not duplicate** — Measurements belong to an estimate's own fields and drawings. Copying them would produce two estimates claiming to be measured off the same drawing, with no way to tell which quantity came from where when someone queries a number. Re-point or re-measure in the new estimate instead.

> **Why the selection approvals do not duplicate** — The schedule comes across, but it arrives waiting for approval again. A selection still marked as pushed into the estimate would never push its price into the *new* estimate — so the new job would be quoted short and nothing on screen would tell you. Clicking approve again costs a moment; a silently low quote costs money.

Worked example: pricing a cheaper option

The Hendricks extension is priced at `Tender — Rev A` and the client asks what it would cost with a colorbond roof instead of tiles.

1. In the ⋮ menu of `Tender — Rev A`, choose **Duplicate**.
2. Rename the copy `Tender — Rev B (colorbond roof)`.
3. In the new estimate's BOQ, open the roofing cost code and swap the tile items for the colorbond items from your price list.
4. Compare the two estimates side by side in either one's **Summary** — the budget vs actual bars under the table put them on one scale.

Rev A is untouched. If the client goes back to tiles, you still have the original priced and ready to submit.

Templates

Ticking **Make this estimate a template** makes an estimate available in the **Copy items from a template** dropdown when creating new estimates.

This is how most builders avoid rebuilding the same bill on every job. Set up one estimate with your standard cost codes and the items you use on nearly every build — preliminaries, site costs, the standard trades — mark it as a template, and start every new job from it.

A template is a normal estimate. It lives under a project like any other, so many builders keep a project called something like `_Templates` to hold them.

Archived and deleted estimates

An estimate can be archived or deleted without touching its siblings.

Both are hidden from the list of estimates by default. The **Show trashed and archived** switch under the list of estimates brings them back into view, marked **Archived** or **Trashed** so you know what you are looking at. **Restore from trash** in the estimate's menu brings a trashed one back; untick **Estimate is archived** under **Edit details** to unarchive one.

Two things worth knowing about that switch:

- **It remembers.** Your choice is kept against your login, so it survives leaving the page and coming back — you do not have to re-tick it every time.
- **Showing them is not the same as being able to use them.** A trashed or archived estimate appears in the grid but still cannot be selected, which is why the grid hides them by default: it then agrees with the estimate dropdown, which has always excluded them.

See Archiving and deleting.

14.4 Project details and permissions

Editing project details, the house size used for rate reporting, and controlling who can see and change a job and its estimates.

The **Project details** tab holds the job's own details; **People** controls who can open it and its estimates; and an open estimate's **Settings** sets which cost code lists it uses.

Project details

Edit on the **Project details** panel opens the job's name, code, site address and GST. All of them can be changed at any time.

The site address is four fields — street, suburb, state and postcode — and **Find the site address** fills them from Google. An older project opens with its suburb, state and postcode picked out of the second address line; check them and save once. The postcode matters beyond the paperwork: it is where the weather on the Schedule, Bookings and Site Diary comes from.

The job status, supervisor, house size and contract price belong to each **estimate**, not to the project — open them with **Edit details** in the estimate's menu on the Estimates tab. Two are worth revisiting as a job progresses:

- **Job status** drives the status filter on the Projects list. Keeping it current is what stops your live-jobs view filling up with finished work.
- **Contract price** (inc GST) should be filled in the moment the job is won. Until it is, the claimed-against-revenue metric has nothing to measure against, and contract stages set as a percentage come to $0.

House size

Each estimate has a **House size (m²)**. It feeds the `$/m²` figures — budget, contract and actual per square metre — and nothing else. No price anywhere changes because of it, but a rate per square metre is often the first number a client or a builder compares between jobs, so it is worth filling in.

People

The **People** tab lists the people in your company, with a switch for the job and one for each of its estimates. Switching one on gives that person edit access. Someone marked **View only** can open the job but not change it; **Allow editing** upgrades them.

A few rules protect you from locking a job:

- You cannot remove your own access — ask another editor.
- The last person who can edit a project or estimate cannot be removed. Give someone else edit access first.
- An estimate can only be given to someone who can already open its project.
- Turning off someone's project access also removes their estimates on it.

A user who has been granted the module but not the project can open Projects List and see nothing. That is the usual explanation for "the module is there but it's empty" — it is access, not the module.

This is also how you let an estimator work on the tender estimate while keeping the signed contract estimate to a few people, or hide a sales estimate from people who only need the production one.

Cost codes

Open an estimate and go to **Settings**: **Cost codes** lists your company's cost code lists. Switch one on to use it on the open estimate; **Other estimates** shows which other estimates use it, and lets you stop one of them using it. **Manage lists** creates, renames or deletes the lists themselves - they are shared by every project - and its sitemap button edits a list's levels.

Switching a cost code list off (here, or for another estimate) when some of the estimate's items are filed only under it asks first. It says how many items and how much money. Those items stay on the job and keep counting in its total, but they're in no cost code until you file them. The BOQ lists them under **Not in a cost code**, and you can switch the list back on at any time.

A list ticked **Switch on for every new estimate automatically** (in its **Edit** form) is switched on for each new estimate, so new jobs start with the right structure rather than an empty one. See Cost Codes.

The two kinds of access

These are separate systems and they fail in different ways. When someone cannot get to something, work out which one it is first:

Symptom	Cause	Fixed under
Menu item greyed out, no padlock	No module access for that user	**Users**
Menu item has a padlock	The company's plan excludes it	Change plan in the Admin panel
Module opens but no projects listed	No project access	The project's **People** tab, by someone who can edit it
Project opens but an estimate is missing	No estimate access	The **People** tab, in that estimate's column

14.5 Markups

The two markup methods, how they turn cost into the price you quote, how a fixed amount behaves, and how to read the calculation.

The Bill of Quantities holds **cost**. Markups turn cost into the **price** you quote. Keeping the two apart is what lets you change your margin without touching a single rate.

Markups are set per estimate: open it on the **Estimates** tab and go to **Price and contract**, with the estimate you want open.

Summary | **Price and contract** | Settings

Price
What the estimate costs, the markups added on top (switch one off to leave it out), and the contract price agreed with the client.

+ Add

On	Markup	Rate	Amount
ON	Profit	13%	$64,801.32
ON	Overheads	4%	$19,938.87
ON	Sales Comm	3.50%	$17,446.51
ON	Project Management	1.50%	$7,477.08
ON	Price Increase Allowance	6.85%	$34,145.31
ON	Contingency	1.50%	$7,477.08
ON	Warranty	0.65%	$3,240.07
ON	Finance Costs	0%	$0.00

Costs	$498,471.71
Markups (31%)	$154,526.22
Costs with markups (ex GST)	**$652,997.93**
GST at 10%	$65,299.80
Built-up price inc GST	**$718,297.73**
Contract price (inc GST) Change	$720,000.00 $1,702.27 above the built-up price

GST comes from the project (Project details tab › Edit).

Overheads and margin, set once and applied down the estimate.

The two methods

Each markup is one of:

Method	What it does	Typical use
Percentage of the costs	Adds a percentage of what the job costs you	Overheads, margin
Fixed amount	Adds a flat dollar amount, ex GST	A one-off allowance or fee

Each markup has a switch. Switch one off to leave it out of the price without deleting it — handy for trying the price with and without a contingency.

Add creates a markup; the ⋮ menu has **Copy from another estimate** (add them to what is there, or replace it) and **Delete all markups**.

Worked example

The Hendricks extension comes out at **$182,400** of cost in the BOQ. You want overheads and margin on top, plus a fixed allowance for the council bond.

Markup	Method	Value	Adds
Overheads	Percentage of the costs	8%	$14,592
Margin	Percentage of the costs	12%	$21,888
Council bond	Fixed amount	$2,500	$2,500

Cost $182,400 + $38,980 = **$221,380** before GST.

Change the margin line to 14% and every number moves at once. You have not touched a rate, and the cost side of the estimate is still an honest record of what the job costs you.

How a fixed amount is worked out

A fixed amount is added to the price **exactly as you typed it**, ex GST. Behind the scenes SmarteBuild also spreads it across the items that take the estimate's markups, in proportion to their cost, so each item's sell price carries its share — but the shares always add back up to the amount you typed, however the items change.

Its GST follows the items it is spread over: if some of them are GST-free, that part of the fixed amount carries no GST either.

> **If you see a red note under the markups** — SmarteBuild used to work a fixed amount out as a percentage of the estimate's total as it was last saved, so after items changed it could land a little more or less than typed. If the markups table ever shows a red note saying a fixed amount does not reach the price in full, the database update that fixes this has not been applied to your server yet — contact support.

Item markup

Individual BOQ items can carry their own **Item Markup**. An item with its own markup takes **only** that markup — the estimate's markups, fixed amounts included, are not added to it. Use it sparingly: for a trade you price differently from the rest of the job, or a supply-only item you do not want full margin on.

When any items have their own markup, the calculation shows them on a line of their own, so the lines still add up to the price.

Reading the calculation

Under the markups table, the calculation builds the price line by line:

Line	What it is
Costs	What the job costs you, from the BOQ
Markups	What the estimate's markups add
Items with their own markup	Only shown when there are some
Costs with markups (ex GST)	The price before GST
GST	Worked out item by item — GST-free items carry none, so it is not always exactly 10%
Price inc GST	The built-up price
Contract price on the estimate	What you typed on the estimate, and how far it is from the built-up price

The **Metrics** panel on the Estimates tab then shows how the contract price, the budget and the cost codes combine into your margin — the quickest sanity check on an estimate.

Where markups go next

Once the job is won, the contract price you agreed becomes the figure that progress claims measure against, and the difference between committed cost and the marked-up sell price is what the estimate metrics track as the job runs.

14.6 Clients

Recording the client on a job, and where their details are used downstream.

The client is the party on the other side of the building contract. Their details are held on the project, in **Project Info**.

Field	Used for
Client Full Name	The name on claims, variations and the contract
Email	Where claims, variations and selection schedules are sent
Phone	Contact detail on site paperwork

Get the name right for the contract

Client Full Name is what appears on the documents you issue — progress claims and variations in particular. It should read the way the contract reads.

For a couple building a house, that usually means both names: `A & J Hendricks`, not `Andrew Hendricks`. For a company, use the entity name and not the contact's name: `Torquay Property Holdings Pty Ltd`, not `Sam Rowe`.

> **Tip** — If a claim is ever disputed, the name on it wants to match the name on the contract. Fixing this after twelve claims have gone out is far more annoying than getting it right at the start.

Where the email goes

The client email is the default recipient when you issue:

- a **progress claim**
- a **variation** for approval
- a **colour selection** schedule

Getting it wrong does not fail silently in a dangerous way — the send fails or goes to the wrong person, and you find out. But it is one field, and it is used often enough to be worth checking before the first claim.

Filtering by client

The Projects list can be filtered by client, which is how you pull up every job for a repeat customer or a developer running several lots at once.

For that to work, the client name has to be spelled the same way on every job. `Torquay Property Holdings P/L` and `Torquay Property Holdings Pty Ltd` are two different clients as far as the filter is concerned.

Clients and suppliers are different things

A client is who you are building **for**. A supplier is who you buy **from**, and lives at company level under **Suppliers**.

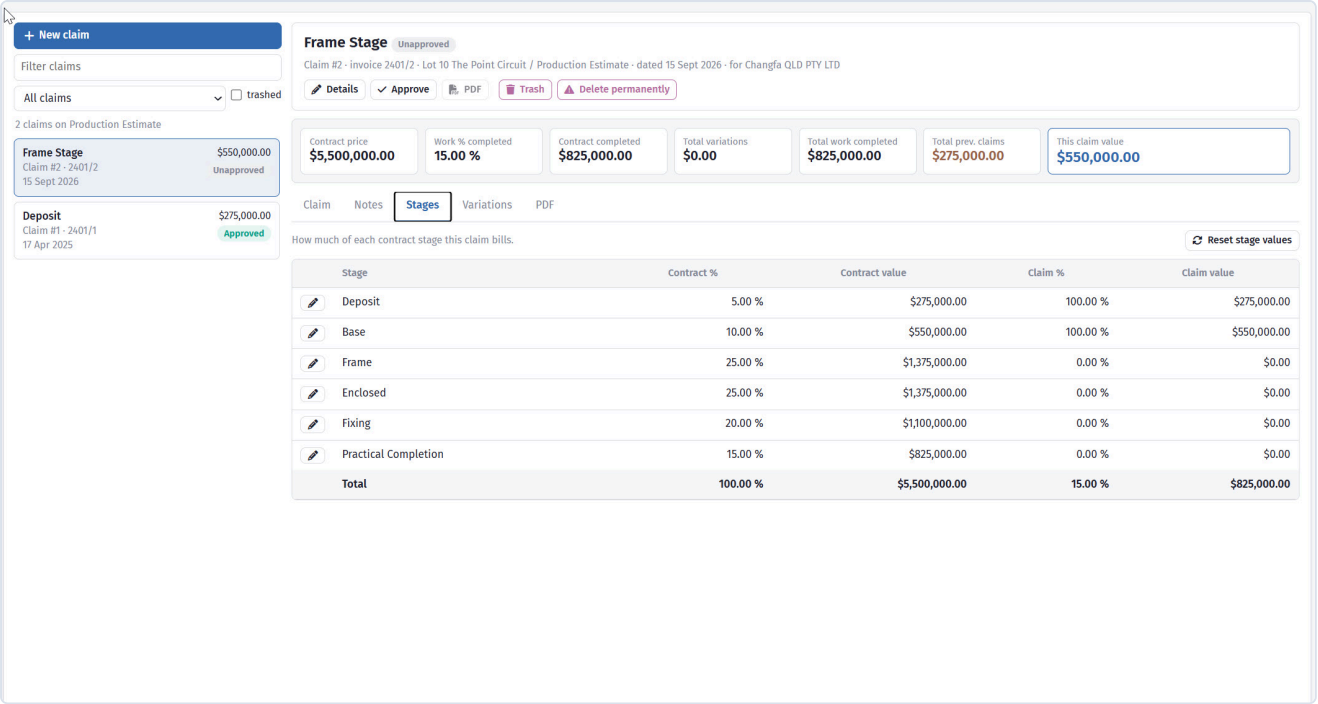
They are separate lists on purpose, and the same business can legitimately appear in both — a developer you build for who also supplies materials, for instance.

14.7 Contract stages

Setting up the payment stages of a building contract so progress claims can be raised against them.

Contract stages are the payment points in your building contract — deposit, base, frame, lock-up, fixing, completion. Setting them up is what lets you raise a progress claim by ticking a stage rather than working out a percentage by hand.

They are edited from **Edit Stage** on the project.



The stages your contract pays on, and what share each one claims.

The fields

Field	What it does
Stage Name	What the stage is called in the contract
Percentage	What share of the contract sum this stage represents
Expected Date	When you expect to reach it
Linked Task	A schedule task that drives the date, and says when the stage is ready
Sorting Index	The order the stages run in

Worked example: a standard residential contract

A typical Victorian domestic building contract:

Stage	Percentage	Sorting Index
Deposit	5%	1
Base	10%	2
Frame	15%	3
Lock-up	35%	4
Fixing	25%	5
Completion	10%	6

The percentages total 100. On a $221,380 contract, the lock-up claim is $77,483 — and Progress Claims works that out for you rather than you reaching for a calculator each time.

> **Check that your percentages total 100** — Nothing stops you saving stages that add up to 98% or 104%. The claims will follow whatever you entered, and the error usually surfaces at the final claim when the figures do not close out. Add them up before you leave this screen.

Linked Task

Contract stages
How the contract price (inc GST) is claimed from the client - deposit, slab, frame and so on.

+ Add

Allocated $720,000 of $720,000

#	Stage	Share	Amount	Running total	Expected
1	Deposit In 2 claims 100% of the work complete	5%	$36,000.00	$36,000	10 Sept 2026
2	Base In 2 claims 100% of the work complete	10%	$72,000.00	$108,000	14 Oct 2026
3	Frame In 2 claims 100% of the work complete	25%	$180,000.00	$288,000	27 Jan 2027
4	Enclosed In 2 claims 100% of the work complete	25%	$180,000.00	$468,000	31 Mar 2027
5	Fixing In 2 claims 100% of the work complete	20%	$144,000.00	$612,000	21 Nov 2021
6	Practical Completion In 2 claims 100% of the work complete	15%	$108,000.00	$720,000	23 Nov 2021
	Total	**100%**	**$720,000.00**		

Link a stage to a task and its expected date follows the schedule.

Linked Task ties a stage to a task in the schedule. It does two things:

- **The Expected Date comes from the task** — specifically the task's computed finish date, rather than the date stored on the stage.
- **The stage is only "ready" once that task is 100% complete.**

That second point is what makes the income side of Cash flow meaningful: it can separate money you could claim today from money that is still ahead of the work.

Why it is worth linking

An unlinked stage sits on whatever date was typed when the contract was set up. A linked one moves with the programme.

So when the frame slips a fortnight, the frame claim slips with it, and your cash flow updates itself. Without the link, you are looking at a projection built on dates that stopped being true in March.

> **Linking does not raise the claim** — Nothing is created automatically. Progress claims stay entirely manual — a stage showing as ready is a prompt to go and raise one, not a sign that one exists. See Raising a claim.

Linking is optional. Leave it blank if you are not running the schedule in SmarteBuild — an unlinked stage uses its own Expected Date, is always treated as ready, and is claimed exactly as before.

Expected dates

Expected Date drives the income projection in the cash-flow view across the life of the job. Rough dates are far better than no dates; the shape of the curve is what matters, not the precise day.

On a stage with a **Linked Task**, this date is driven by the task instead, so you do not have to keep it current by hand.

Stages and the contract price

Stages are percentages of the **contract price** on the project, so that figure has to be filled in before the claim amounts mean anything. If your stages look right but the claim values come out as zero, check the contract price first.

What uses them

- **Progress Claims** raises claims against stages
- **Cash Flow** uses their expected dates to project income
- **Variations** add to the contract sum, and so change what each remaining stage is worth

14.8 Organising your projects

The EPS, project filters, job numbers and sorting - how to keep a long project list usable.

After a year or two the Projects list is long. Three tools keep it usable: the EPS, the filters, and job numbers.

The EPS

EPS stands for Enterprise Project Structure. It is a folder tree for your projects — a way of grouping jobs so the list is browsable rather than flat.

Each node has an **EPS Code** and an **EPS Name**, and a project is placed in one via **This project belongs to**.

What to organise by

The right structure is whatever you would naturally use to answer "which jobs?". Common ones:

By	Looks like
Division	`Residential` → `New Build`, `Renovation`
Region	`Geelong`, `Surf Coast`, `Melbourne West`
Estate or developer	`Aspen Estate`, `Torquay Property Holdings`
Year	`2025`, `2026`

Pick one and stay with it. A tree that mixes region at one level and year at another gets hard to navigate quickly.

> **Do not build it too deep** — Two levels covers almost every builder. Three is occasionally justified. Beyond that you spend more time expanding nodes than you save by having them.

Filter EPS narrows the tree when it gets large, and **Select a Node** is how you place a project into it.

Finding a project quickly

Find a project, at the top of the projects list in the left menu, narrows that list as you type. It matches the names already on screen, so it answers on every keystroke without reloading the page, and Escape clears it.

This is the fast way to reach a job you can name. The filters below are for narrowing the list to part of your EPS and leaving it that way.

Project filters

The funnel beside **Projects** in the left menu opens the **Project Filters** panel. It holds four things:

Setting	What it does
Show Archived	Includes archived projects in the list.
Show Job Number on the jobs list	Puts the project **Code** in front of each name.
Filter EPS	Which EPS heading to filter by.
Select a Node	Which node within that heading to narrow to.

These apply everywhere the projects list appears, not just on this page — so setting one follows you into every module.

While an EPS filter is on, a chip under the find box names it, so a short list reads as filtered rather than as a permissions problem. Click the chip to change or clear it.

If a job you know exists is not showing, the filter is the first thing to check, followed by **Show Archived**.

Job numbers

The project **Code** is your job number. It is always shown beside the name on the Projects list, and **Sort → Job code** puts the list in job-number order, which is usually chronological.

Show Job Number on the jobs list, in the filters panel, is about the **left menu**: it puts the code in front of each name there too. Turn it on if your team refers to jobs by number — on site, in the office, and on supplier orders, the number is often what people actually say.

Sorting and grouping

On the Projects list itself, **Sort** offers newest first, oldest first, name A–Z, job code, biggest budget, and most spent as a percentage of budget.

That last one is the one worth knowing. It puts the jobs closest to eating their budget at the top, which is a different and more useful question than which job is biggest.

Group by puts the jobs under headings with a subtotal on each, using the EPS headings described above — pick the heading, say Region, and every job files itself under its node. Jobs not filed anywhere appear under **Not filed** at the end, which is the quickest way to find the ones nobody has placed. **None** puts the list back flat.

Grouping by a region or a division gives each part of the business its own block with its own subtotal. Which grouping is useful depends on how you actually divide the work — see What to organise by above.

A practical setup

For a builder carrying twenty to thirty live jobs:

1. Build an EPS two levels deep by division and region.
2. Turn on job numbers.
3. Set the default project filter to exclude finished statuses.
4. Group by supervisor.
5. Archive jobs as they complete rather than leaving them in the list.

The last point does most of the work. See Archiving and deleting.

14.9 Archiving and deleting

The difference between archive, trash and permanent deletion, what each one takes with it, and how to get things back.

There are three ways to take a project off your list, and they are not interchangeable. Two are reversible; one is not.

The three actions

Action	Reversible	Use it when
Archive	Yes	The job is finished and you want it out of the way
Trash	Yes	You think you are done with it but are not certain
Delete Permanently	**No**	It was created in error and contains nothing you need

Estimates have their own **Duplicate** and **Delete Permanently**, so a single priced version can be removed without touching the project or its siblings.

Archive is what you usually want

A finished job still holds things you will want later: what it cost, what the variations were, which subcontractor did the roof, what you paid for the windows. That history is the most useful pricing data you own.

Archiving keeps all of it and removes the job from your day-to-day list. Tick **Show Archived** to see archived jobs again, and un-archive any of them.

> **Archive as you go, not once a year** — The list stays useful if finishing a job includes archiving it. Builders who leave it until the list is unmanageable end up filtering instead, which hides the problem rather than fixing it.

What Delete Permanently takes with it

Deleting a project permanently removes everything underneath it:

- every estimate
- every Bill of Quantities and all its items
- every take-off measurement
- every purchase order, expense, variation and progress claim
- the schedule, defects and the project feed
- documents attached to the project

> **There is no undo, and no recycle bin behind it** — This is not a soft delete. Once it completes, the job and its history are gone — including the orders you issued and the claims you made. If there is any chance you will need the record, archive instead.

To make sure it is the right one, **Delete permanently** asks you to type the project's or estimate's name first; the button stays greyed out until the name matches.

A permanent delete is all or nothing. If it cannot finish, for any reason, nothing is removed and the project or estimate is exactly as it was. Reload the page and try again, or contact support.

Some things are kept even after a permanent delete, because they belong to something else:

- **Leads** that became this job stay in your Leads list, no longer linked to it.
- **Xero export history** stays, so your accounts still match.
- A line on **another job's** order, quote or invoice that pointed at a deleted item keeps its description and amount. It only loses the link.

When SmarteBuild refuses to delete

A project or estimate that has **safety incident records** or **timesheet entries** cannot be deleted permanently. The law requires you to keep safety records and wage records, so SmarteBuild will not remove them with the job. You will see a message saying which one applies, and nothing is removed. Archive the estimate instead.

Getting something back

You did	To recover
Archived a project	Tick **Show Archived**, select it, un-archive
Trashed a project	Tick **Show Archived**, select it, restore
Archived or trashed an estimate	Switch on **Show trashed and archived** under the list of estimates, then **Restore from trash** in its menu, or untick **Estimate is archived** under **Edit details**
Deleted permanently	Nothing. Contact SmarteBuild support to ask about backups.

Before you delete a project

Worth doing first, if there is any doubt:

1. Export any reports you might want — cost summaries, the final BOQ.
2. Export marked-up take-off PDFs, if the measurements matter as a record.
3. Check whether any other job was duplicated from this one and still refers to it.
4. Archive it and wait a month. If nobody has asked for it by then, delete it.

Step four costs nothing. Permanent deletion is almost never urgent.

CHAPTER 15

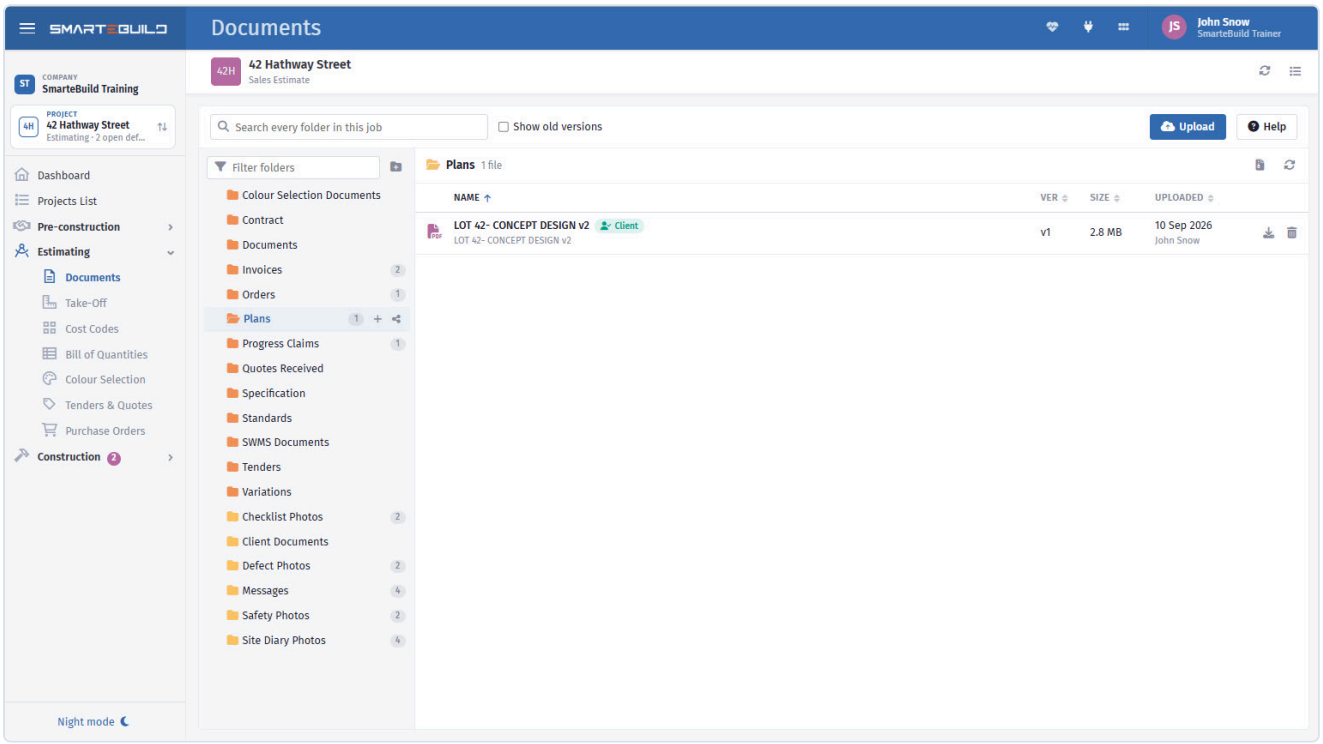
Documents

15.1 The document register

What Documents holds, how the page is laid out, and what else in SmarteBuild reads from it.

Documents is the drawing register for a job: the drawings, specifications, reports, certificates and photos the job runs on.

It is worth treating as a register rather than a folder, because other parts of SmarteBuild read from it.

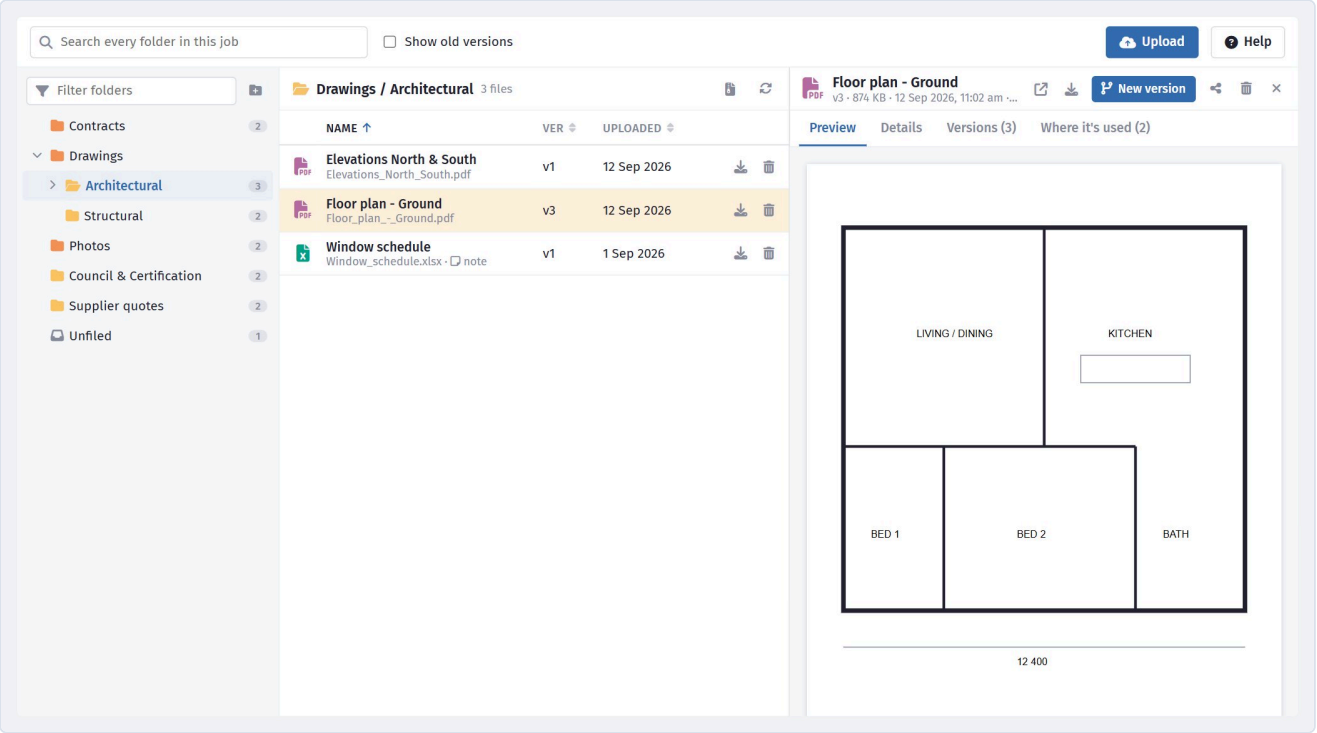


Folders on the left, the open folder's files on the right.

How the page works

Part	What it does
Folders (left)	The job's folders. Click one to list its files. **Filter folders** finds a folder by name.
File list (middle)	The folder's files. Click a column heading - **Name**, **Ver**, **Size**, **Uploaded** - to sort by it; click again to reverse.
Search (top)	Looks through **every folder in the job** at once - titles, file names and notes. The results show which folder each file is in.
Show old versions	Replaced copies are hidden until you tick this.
Upload	Adds files to the open folder. You can also drag files from your computer onto the list or onto any folder.
Files / Register / Transmittals / RFIs / Activity	The views at the top left. **Register** is the drawing register (numbers, revisions, statuses); **Transmittals** is the record of documents formally issued; **RFIs** are the questions put to the architect, engineer and consultants; **Activity** is the record of who did what. See The drawing register, Transmittals, RFIs and Restricted folders, upload links and activity.

Click a file and the screen splits in two: the list on the left, the file on the right.



A file open beside the list - preview, details, versions and where it is used.

The file side has four tabs:

Tab	What is on it
Preview	The PDF or photo itself. Other file types show a Download button.
Details	Title, file name, note, what changed in this version, and the auto-attach and obsolete settings.
Versions	Every version of this document, newest first. Click one to open it.
Issued	Everyone who was sent any version of it, and whether what they hold is current.
Where it's used	The orders, tenders, expenses and BOQ items this file is attached to.

Across the top of the file are **Open in a new tab**, **Download**, **New version**, **Issue**, **Share** and **Delete**.

What reads from it

Module	Uses documents for
Take-Off	Measuring quantities off the PDFs
Tenders	Attaching drawings to bid packages
Purchase Orders	Attaching details to supplier orders
Expenses	Keeping the supplier's invoice with the expense
Client portal	The documents you choose to show the client

That is why a document uploaded here is more useful than the same file on a network drive: it can be measured, tendered from, attached to an order, and shared - without leaving the job.

> **Nothing leaves the job unless you share it** — A document only appears on the client's portal if you tick it to show there or put it in the **Client Documents** folder, and only reaches a subcontractor or supplier if you attach it to their order or tender or send them a link. See Sharing documents.

Versions matter

A document is a **thing** with versions, not a series of separate files.

`A-101 Floor Plan` is one document; Rev A, Rev B and Rev C are versions of it. Open the document and click **New version** when Rev C arrives, and Rev B is kept as an old version rather than sitting beside it as a separate file.

That is what makes the Take-Off carry-over work - when you open a drawing you have measured on and a newer version exists, Take-Off knows they are the same drawing and offers to bring your measurements forward. See Versions and revisions.

> **This is the mistake worth avoiding** — `plans.pdf`, `plans final.pdf` and `plans final v2.pdf` as three separate documents is how a drawing register stops being useful. One document, three versions.

In this section

- Uploading and organising
- Versions and revisions
- Auto-attaching to bids and orders
- Sharing documents
- Attaching files to orders, tenders and expenses
- The drawing register
- Transmittals
- RFIs
- Restricted folders, upload links and activity

15.2 Uploading and organising

Getting files in, titling them so they can be found, folders, moving, searching, and deleting.

Getting files in is quick. The work worth doing is in how you title and file them.

Uploading

Three ways, all into a folder:

- **Drag files from your computer onto the file list.** They go into the open folder.
- **Drag them onto a folder** on the left. They go into that folder, whichever one is open.
- **Upload** at the top, then choose the files.

You can drop several files at once. When they are in, a message says how many were uploaded; if any were refused - a type of file SmarteBuild does not accept, or one too big - it lists each one and why, so nothing goes missing quietly.

Upload a single file into the open folder and it opens straight away, ready to title.

> **Pick a folder first** — Files always go into a folder. If you search, or have **Unfiled** open, pick a folder on the left first - or drop the files straight onto the folder you want.

Titling

The **Title** is what everyone sees - in the Take-Off drawing picker, in the tender attachment list, on the order. Change it on the **Details** tab of the open file.

Use the drawing's own title and number:

Weak	Better
`plans.pdf`	`A-101 Floor Plan`
`engineering`	`S-201 Slab Layout and Details`
`client stuff`	`Selections Schedule - Hendricks`
`scan001.pdf`	`Soil Report - 18 Beach Road`

Use the architect's numbering, not your own. When they email about A-101 you want to find it without translating.

Suggest (beside the title) proposes titles from the job, the folder and the file name - click one to use it, then **Save**.

Folders

Every job starts with a few standard folders (shown with an orange icon). You can add your own inside them or beside them.

To	Do this
Add a folder	Hover over a folder and click **+** for a folder inside it, or the folder button at the top of the list for one at the top level.
Rename	Hover and click the pencil (or select the folder and press **F2**).
Move a folder	Drag it onto another folder. Drop it on the empty space below the list to move it to the top level.
Delete	Hover and click the bin. Only an empty folder can be deleted - move its files and sub-folders out first (old versions count).

The standard folders cannot be renamed, moved or deleted, because every job has them. The folders you open and close are remembered next time.

A structure that works for most jobs:

`Architectural`
`Structural`
`Civil and drainage`
`Services`
`Reports and assessments`
`Certificates and approvals`
`Client selections`
`Contracts`

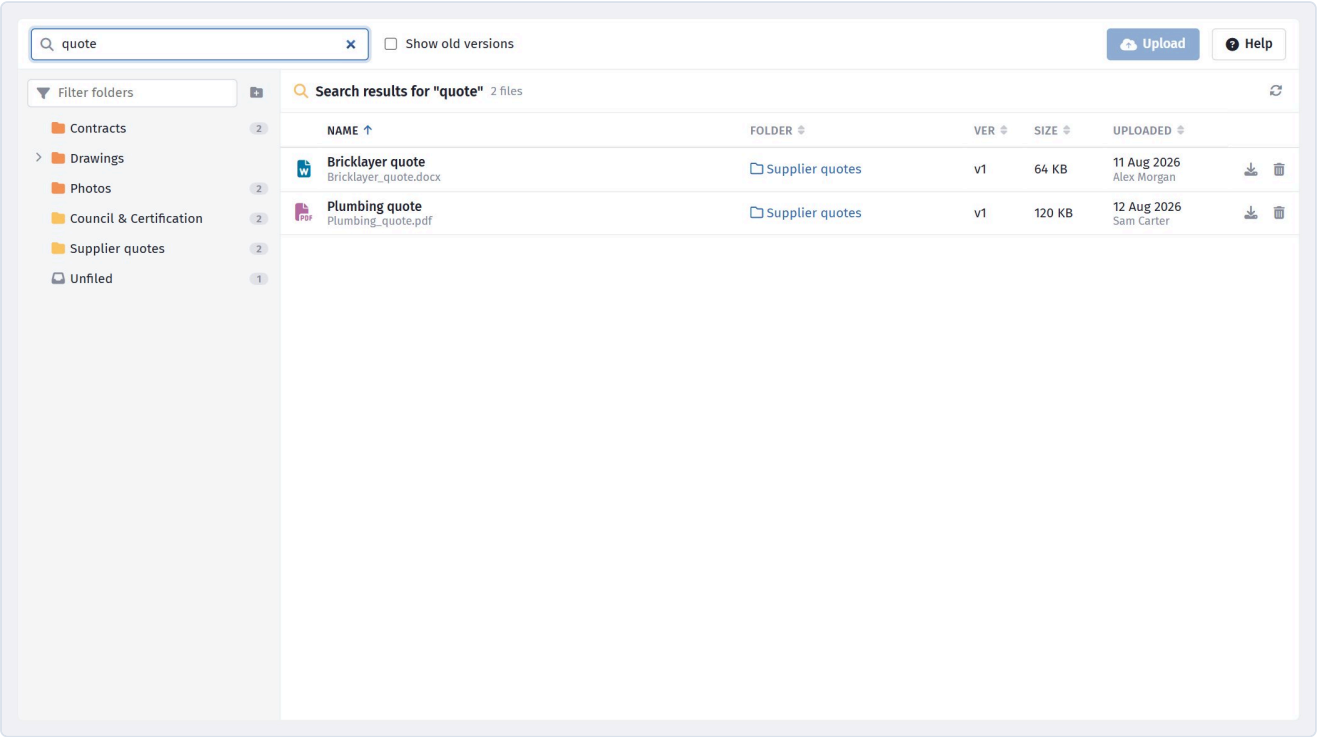
> **Do not build a deep tree** — One level covers most residential jobs. Search does the work that deep folders do elsewhere - it looks through every folder at once.

Moving files

Drag a file from the list onto a folder on the left. It moves, keeps its versions and stays attached to everything it was attached to.

Finding things

Type in **Search every folder in this job** and the list shows every match, wherever it is filed, with its folder in its own column. Click the folder name to go there.



Search looks through every folder; the Folder column says where each file lives.

Click **Name**, **Ver**, **Size** or **Uploaded** to sort. Sorting by **Uploaded** puts the newest first - the quickest way to find what arrived this morning.

The zip button above the list downloads the whole folder in one go (tick **Show old versions** first if you want those too).

Notes

Note (Details tab) records anything worth knowing about a document - why a report was commissioned, what it supersedes. A small note mark in the list shows which files have one.

What changed in a particular revision goes in **What changed in this version** instead, so it stays with that version. See Versions and revisions.

Obsolete documents

Tick **Obsolete** on the Details tab to mark a document as no longer current without removing it - a drawing withdrawn entirely rather than superseded, or a report that no longer applies.

It disappears from the list (tick **Show old versions** to see it), stops auto-attaching to new orders and tenders, and disappears from the client's portal. The record stays.

Deleting

The bin on a file's row, or on the open file, deletes it for good.

A file **cannot be deleted while it is attached to something** - an order, a tender or quote, an expense, a variation, a claim or a BOQ item. SmarteBuild says where, and the **Where it's used** tab lists them. Items, orders, expenses and quotes can be removed there with **Remove** (or **Remove from all**); the others are removed from the record itself.

Deleting the newest version of a document makes the previous version the current one again.

> **Prefer obsolete to delete** — A superseded drawing is sometimes exactly what you need - to show what was issued at the time a price was given. Mark it obsolete, or let a new version replace it, rather than deleting it.

Before you take off

Two things worth checking before opening a drawing in Take-Off:

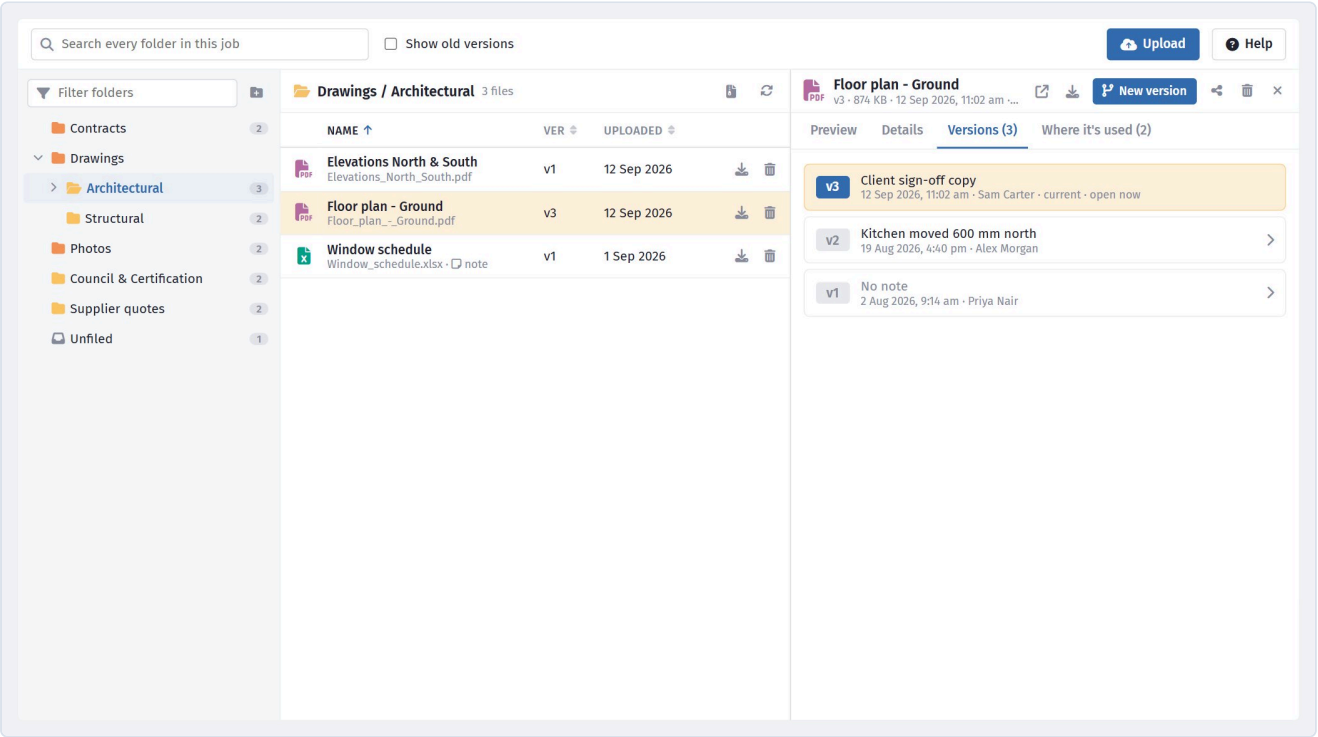
1. **It is the current version.** Measuring a superseded drawing is a whole afternoon lost.
2. **It is a real PDF**, not a renamed image or an office document. Take-Off will not open those.

15.3 Versions and revisions

Uploading a new revision so it replaces the old one, linking two copies uploaded separately, and what to do when drawings change mid-job.

A document has versions. `A-101 Floor Plan` is the document; Rev A, Rev B and Rev C are versions of it.

Getting this right is what makes everything downstream work.



Every version is kept, newest first, with what changed in each.

Uploading a revision

1. Open the current version of the document.
2. Click **New version**.
3. Drop the new file in (or click to choose it), check the **Revision** (it is filled in with the next one - B becomes C) and say what changed - *"Rev C - alfresco extended 1 m, window W4 deleted"*.
4. Click **Upload as v4** (the number is the next one).

If anyone was sent an older revision - on a transmittal, by a share link, or with a purchase order that has gone out - a list of them opens straight away, with one button to issue them the new revision. See Re-issuing a superseded drawing.

The new copy keeps the document's title, folder, note and auto-attach settings. The old one is kept as an old version - hidden from the list unless **Show old versions** is ticked, and still on the **Versions** tab.

Purchase orders that have **not been sent yet** switch to the new copy, so an order going out tomorrow carries the current drawing. Orders already sent keep the copy they were sent with - that is the record of what the supplier was given.

> **New version is on the latest version only** — Open an old version and the page says so, with a link to the latest. Upload the new revision onto that one.

Two copies uploaded separately?

It happens - someone uploads Rev C as a brand-new file. Link them rather than living with two unrelated files:

1. Open the **newer** file.
2. On **Details**, under *Uploaded separately?*, click **Link to an earlier file...**
3. Pick the earlier copy and click **Link as previous version**.

The earlier one becomes the previous version and the newer one takes the next version number, exactly as if it had been uploaded with **New version**.

Why it matters

Three things depend on the relationship between versions.

Take-Off carry-over. Open a drawing you have measured on when a newer revision exists, and Take-Off offers to bring every measurement forward, flagged for review. That only works because it knows the two files are the same drawing. See Drawings, revisions and export.

The Take-Off picker hides superseded revisions by default, so you cannot accidentally measure last month's drawing.

Orders and tenders send what is current, so a package going out after a revision carries the new drawing.

> **Uploading a revision as a new document breaks all three** — You get two unrelated files, no carry-over offer, both showing in the picker, and no indication which is current. If it has happened, link them as above.

What to do when drawings change

A sequence that works:

1. **Upload the new revision** with **New version** on the existing document.
2. **Say what changed** - from the architect's revision cloud or transmittal.
3. **Open Take-Off** and accept the carry-over.
4. **Review the carried measurements** against the new drawing. Adjusting one clears its flag; confirm the ones still correct.
5. **Check the BOQ** for quantities that have moved.
6. **Raise a variation** if the change is the client's and the job is under contract.
7. **Revise or void any orders** affected.
8. **Re-issue the new revision** to everyone holding the old one - the list opens when you upload it, and includes suppliers on sent orders. Re-issue any tender still out on the old drawing too.

Steps 6 to 8 are the ones missed under pressure, and they are the expensive ones. A drawing change is rarely just a drawing change.

Say what changed

Use the issuer's revision letter or number in **What changed in this version** - `Rev C - ...`, not `latest` or `new one`. It is shown against each version on the Versions tab, so the history reads like a transmittal.

Old versions are worth keeping

Do not delete an old version. It is the evidence of what was issued when.

The question it answers is a real one: *"you priced this off Rev B, which showed a timber deck - Rev D changed it to concrete, which is why there is a variation."* That argument needs Rev B to exist.

If you do delete the newest version by mistake, the previous one becomes current again.

Which revision was priced?

Worth recording, in the estimate name or a note, which revision an estimate was built on: `Tender - Rev A drawings`.

When the client asks why the price has changed, the answer is usually that the drawings did - and being able to name the revision you priced makes that a fact rather than an assertion.

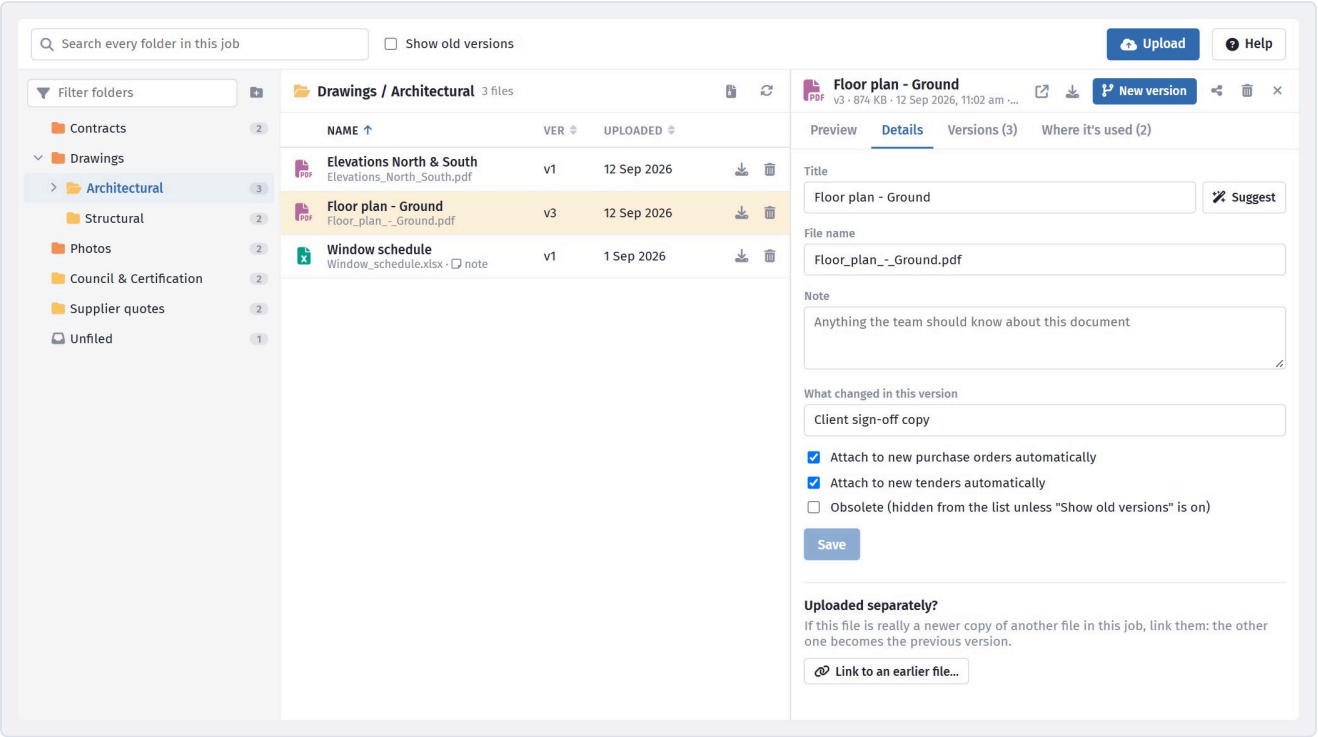
15.4 Auto-attaching to bids and orders

Making a document go out with every tender package or purchase order automatically, and which documents deserve it.

Two ticks on the **Details** tab of an open document:

- **Attach to new purchase orders automatically**
- **Attach to new tenders automatically**

Tick one and **Save**, and the document is included with every new purchase order, or every new tender package, on that job. A document marked **Obsolete** cannot auto-attach - the ticks are switched off with it.



The auto-attach ticks on the Details tab.

What deserves auto-attach

Documents that genuinely go with **everything**.

Document	Bids	Orders
Site plan and access details	•	•
Site safety requirements	•	•
Your standard subcontract conditions	•	—
Insurance requirements	•	—
Delivery instructions	—	•
Soil report	•	—
`A-101 Floor Plan`	—	—

The floor plan is the interesting row. It feels like it should go to everyone, and it should not — the painter does not need it, and a package with four irrelevant drawings buries the two that matter.

> **Auto-attach everything and nobody reads anything** — A subcontractor sent the full 40-sheet set has to find their drawing before they can start. One sent three relevant sheets starts pricing. Attach the specific drawings per package by hand; reserve auto-attach for the genuinely universal.

Site access and safety

The best candidates for both settings.

Every subcontractor pricing the job and every supplier delivering to it needs to know how to get in, where to park, whether there is crane access, and what the site requires. Attaching it once means nobody has to remember.

It also means the information is in writing on every document you issue, which matters if there is ever a question about what a contractor was told.

Standard conditions

Your subcontract conditions, insurance requirements and payment terms belong on every bid.

Sending them with the invitation rather than at award means subcontractors price knowing them. A subcontractor who discovers your retention terms after winning has a reason to renegotiate.

Review it per project

Auto-attach is set per document on a project, so it carries the settings you gave it on that job.

Worth a look when a job starts: what is set to auto-attach, and is it still right? A document that made sense to attach to every order during construction may not make sense during the defects period.

Attaching by hand

Everything else. On a tender or an order, **Attach Files** opens the file picker: tick the drawings that package needs. See Attaching files to orders, tenders and expenses.

When a new version of an auto-attached document is uploaded, the new copy keeps the setting, and orders not yet sent switch to it.

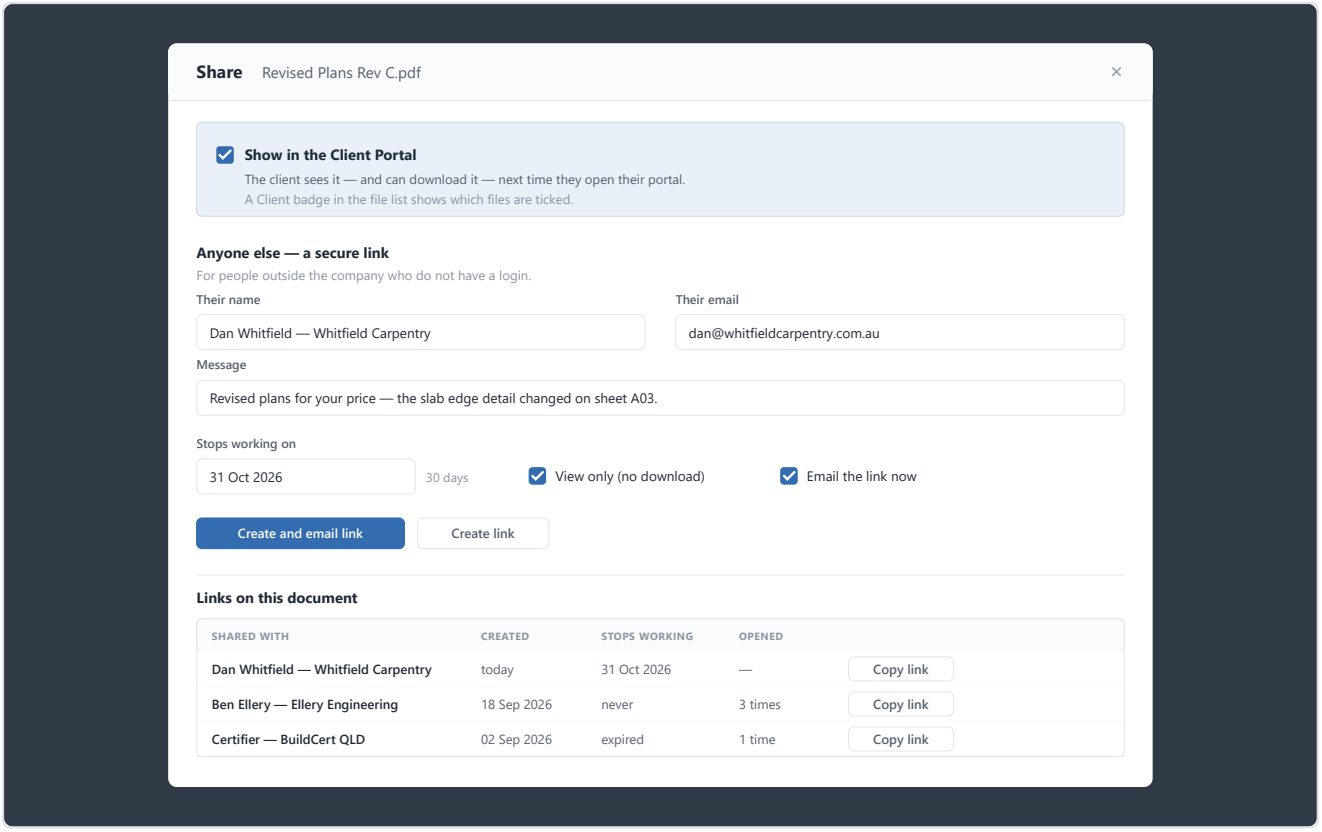
Two or three relevant documents per package, chosen deliberately, beats twelve sent automatically — every time.

15.5 Sharing documents

Showing a document to the client in their portal, and sending anyone else a secure link that can expire, be view-only, and tells you when it was opened.

Two kinds of people need your documents: the **client**, who already has a portal for the job, and **everyone else** - the subcontractor pricing from the revised plans, the supplier checking a detail, the engineer, the certifier.

Both are done from one window. Open a file and click **Share** (the share icon beside **New version**), or hover over a folder on the left and click its share icon.



One window: the client tick at the top, secure links underneath.

The client

Tick **Show in the Client Portal** and the client sees the document - and can download it - next time they open their client portal. Untick it and it is gone from their page. A small **Client** badge in the file list shows which files are ticked.

For a folder, **Show all to the client** ticks every current file in it at once, and **Hide all from the client** unticks them.

> **The Client Documents folder is always shown** — Everything in the job's **Client Documents** folder is on the client's page whatever the tick says - that folder exists for exactly that. The tick is locked there; move a file out of the folder to hide it.

Old versions and obsolete documents never show on the client's page, even when ticked. See also Sharing documents, photos and selections.

Anyone else - a secure link

For people outside the company who don't have a login. Fill in:

Field	What it does
Their name	Who the link is for - shown on the link list and on the page they open.
Their email	Where to send it. Needed only if you email it from here.
Message	Optional. Shown in the email and at the top of the page they open.
Stops working on	The last day the link works. Starts at 30 days; untick for a link that does not expire.
View only (no download)	They can read the document on screen but there is no Download button.
Email the link now	Sends it straight away from your company's email, with you copied in. Their reply comes to you.

Click **Create and email link** (or **Create link** if you are not emailing it). The new link appears at the top of the list, where **Copy link** puts it on your clipboard - to paste into a text message or your own email instead.

A **file** link always shows that version. A **folder** link shows the folder's current files at the moment they open it - not its sub-folders or old versions - so a file you add to the folder later is there too.

What they see

A plain SmarteBuild page with your company's name at the top, the job name, who shared it, your message and when the link stops working. The files are listed on the left with a viewer beside them; PDFs and photos open in the viewer, anything else has a Download button (unless the link is view-only).

They do not need an account, and they cannot see anything else on the job.

Who opened it

Each link in the Share window shows **opened 3x (last 22 Sep, 2:12 pm)** or **not opened yet**. Useful when a subcontractor says they never got the drawings.

Cancelling a link

Click the cancel icon beside **Copy link**. It stops working straight away - the person sees "This link has been cancelled" - and stays in the list, greyed out, as a record. Expired links stay in the list the same way.

Cancel and send a new one when:

- the link went to the wrong person,
- the job has moved on and they should not still be looking at it, or
- you need to change the expiry or view-only setting (make a new link with the right settings).

> **View only discourages copying - it does not prevent it** — A view-only link has no Download button and the PDF viewer's own download and print buttons are hidden. Someone determined can still take a screenshot. For anything truly confidential, do not send it outside the company.

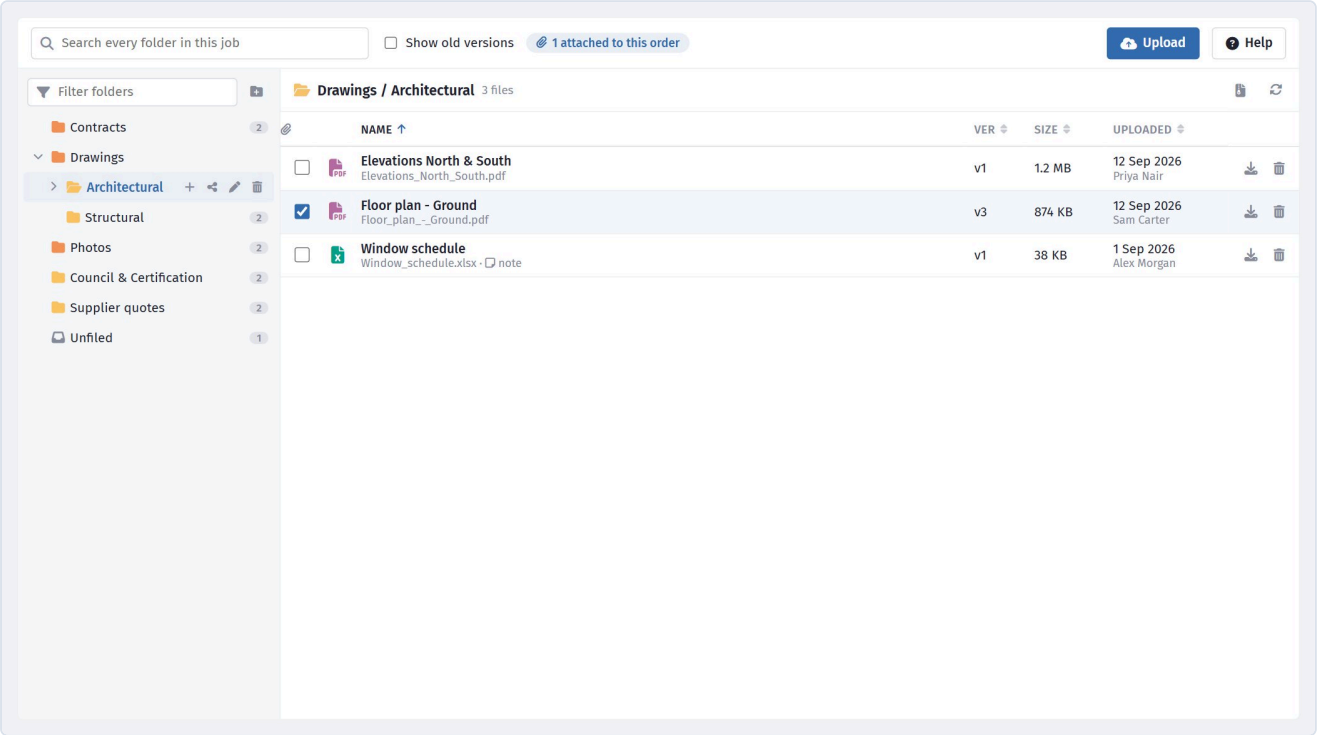
Who can share

Anyone with permission to upload and edit documents can tick files for the client and create or cancel links. Others can open the Share window to see what is shared, but not change it.

15.6 Attaching files to orders, tenders and expenses

The file picker that opens from Attach Files - ticking documents to attach them, uploading on the spot, and who can change what is attached.

Attach Files on a purchase order, a tender, a supplier's quote, an expense or a variation opens the file picker. It is the same Documents screen - folders, search, sorting, preview - with a tick box beside every file.



Ticked files are attached. The count at the top says how many.

Attaching and removing

- **Tick a file** to attach it. It is attached straight away - there is no separate Attach or Save button.
- **Untick it** to take it off.

The count at the top - **2 attached to this order** - covers every folder, so you can tick a drawing in *Architectural*, open *Structural*, tick the slab details, and both stay attached.

Search works here too, and the preview: click a file's name to check it is the right revision before you tick it.

Uploading from the picker

The file you need is often not in Documents yet - the quote came in by email a minute ago. Drag it onto the list (or onto a folder) or use **Upload**, exactly as on the Documents page. **Files uploaded in the picker are ticked automatically**, because that is almost always why you are uploading them there. Untick if not.

They are filed in Documents like any other upload, so they are there for the next order too.

Quotes and expenses

A supplier's quote and an expense each have a **main document** - the quote or invoice itself. It is the first file attached; untick it and the next one takes its place.

Who can attach

Attaching belongs to the thing you are attaching to, not to Documents:

Attaching to	Needs permission to
Purchase order	Edit orders
Tender or supplier quote	Edit tenders
Expense	Edit expenses
Variation	Edit variations

Without it the tick boxes are greyed out: you can see what is attached but not change it. Uploading from the picker follows the same rule, so someone who raises orders can add the supplier's drawing without being able to reorganise the whole document register.

Opening the picker on its own

The **Documents** tile in the app menu (top right) opens the same screen without tick boxes - a quick way to find a drawing without leaving the page you are on.

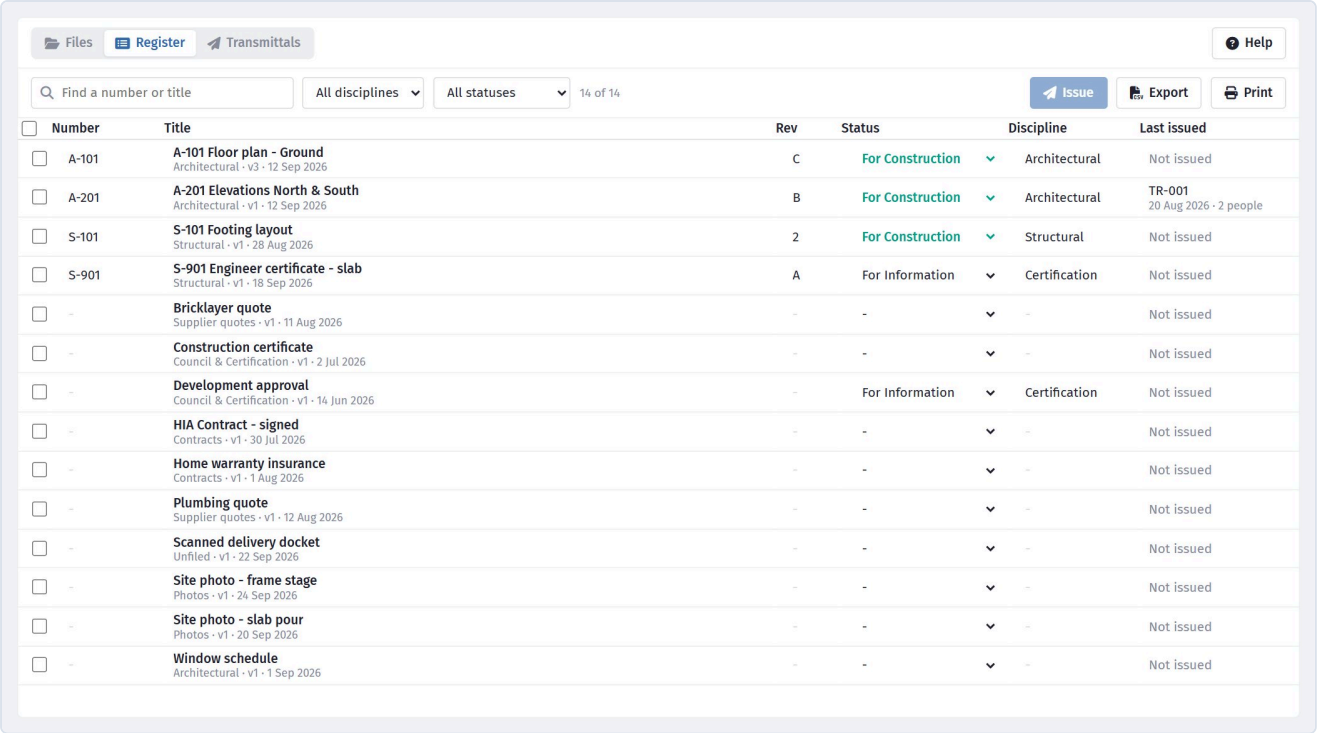
Related

- Auto-attaching to bids and orders - documents that should go with every order or tender without ticking them each time.
- Sharing documents - sending a document to someone outside an order or tender.

15.7 The drawing register

Drawing numbers, revisions, statuses and disciplines for every document on the job - filled in from file names, edited in place, printed or exported for the head contract.

On a commercial job the consultants issue dozens of drawings, each with a number and a revision, and the head contract usually asks you to keep a **drawing register** - a list of every current drawing, its revision and what it is issued for. The **Register** view is that list, kept by SmarteBuild as you upload.



Every current document on the job, numbered ones first, with when each was last issued.

The four details

Every document can carry:

Detail	Example	Notes
Drawing number	`A-101`	The consultant's number, exactly as on the title block.
Revision	`C` , `P2` , `03`	The consultant's revision mark.
Status	For Construction	Preliminary, For Information, For Tender, For Construction or As Built.
Discipline	Structural	Architectural, Structural, Civil, Hydraulic, Electrical, Mechanical, Fire… or type your own.

Set them on a file's **Details** tab, or straight in the Register.

Filled in from the file name

Consultants name their files with the number and revision, and SmarteBuild reads them on upload. Drop a whole drawing set and most of the register fills itself in:

File name	Number	Revision	Title
`A-101_RevC_Floor Plan.pdf`	A-101	C	A-101 Floor Plan
`S201 - Slab Layout - Rev P2.pdf`	S201	P2	S201 Slab Layout
`A-101 [C] Floor plan.pdf`	A-101	C	A-101 Floor plan
`DA-02 Revision 3 Site Plan.pdf`	DA-02	3	DA-02 Site Plan
`Soil report.pdf`	-	-	Soil report

Status and discipline are yours to set - nothing in a file name says reliably whether a drawing is for construction.

Editing in the Register

Click **Register** at the top of Documents. Click into any **Number**, **Rev** or **Discipline** cell and type - it saves when you press Enter or click away (Escape puts it back). **Status** is a drop-down.

Filters narrow the list to one discipline or status; the search box finds a number or title. Click a title to open the document.

> **Set statuses as drawings are issued** — The status is what stops a subbie building off a *Preliminary* drawing. When the architect issues a set for construction, filter the register to Architectural, tick the set, and issue it - then change their status to For Construction.

New revisions

New version on a document now asks for the **Revision**, already filled in with the next one - C becomes D, P2 becomes P3, 03 becomes 04. The number, status and discipline carry forward. The old version stays on the Versions tab and drops out of the register (the register only lists what is current).

If anyone was sent the old revision, the document says so straight away - see Transmittals.

Printing and exporting

- **Print** opens the register as a sheet - print it, or choose *Save as PDF* in the print window. It prints what the filters show, so you can print just the structural drawings.
- **Export** downloads the same list as a spreadsheet that opens in Excel.

Both include when each drawing was last issued and on which transmittal.

15.8 Transmittals

Formally issuing documents to subcontractors, suppliers and consultants - a numbered record of who got which revision, when they opened it, and that they received it. Plus re-issuing when a drawing is superseded.

A **transmittal** is the formal way of sending documents on a commercial job: a numbered record (TR-001, TR-002...) saying which drawings, at which revision, went to whom, when, and what for. If there is ever a question about what a subcontractor was given, the transmittal answers it.

Why it matters

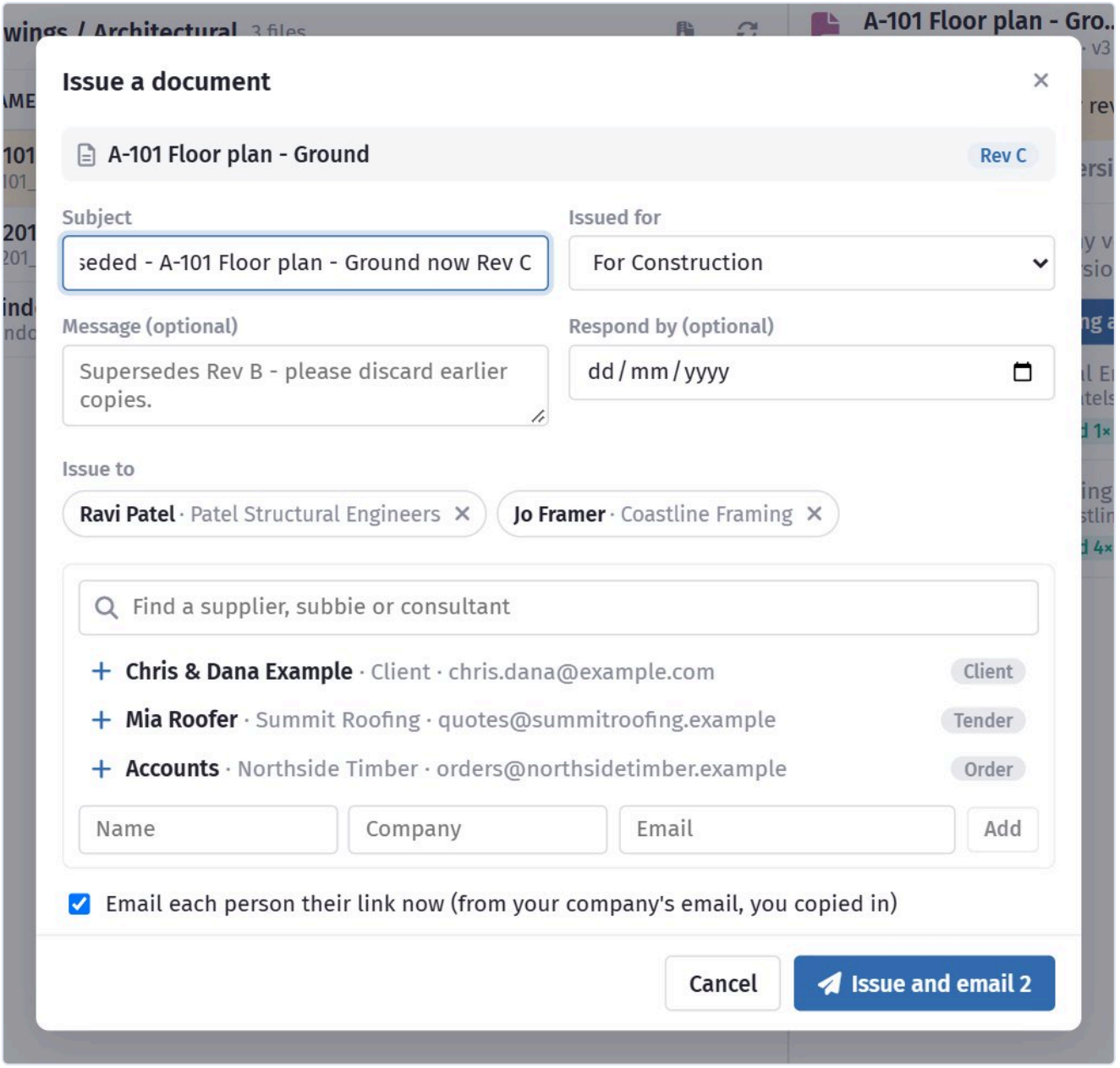
Building off a superseded drawing is the most expensive mistake on a commercial job - a slab poured to Rev B, windows ordered off the old elevations. Transmittals stop it two ways:

- everyone gets the revision you meant, with a record they received it, and
- when a new revision arrives, SmarteBuild shows who still holds the old one and re-issues to them in one click.

Issuing documents

Three ways in:

- Open a document and click the **Issue** button (the paper plane) at the top.
- In the **Register**, tick the documents and click **Issue**.
- From the "older revision" warning - see *Re-issuing* below.



The documents and revisions at the top, then who it goes to.

Fill in:

Field	What it is
Subject	What this issue is - *Structural drawings - issued for construction*.
Issued for	For Information, For Construction, For Tender, For Review / Comment, or For Approval.
Message	Optional - *supersedes Rev B, please discard earlier copies*.
Respond by	Optional - a date, for documents issued for review or approval.
Issue to	The people. Pick from the list or type someone new.

The list suggests people already connected to the job: anyone you have issued to before, the client, the subbies invited to its tenders, and the suppliers on its orders. Type to search all your suppliers and their contacts.

Leave **Email each person their link now** ticked and each person gets an email from your company's address, with you copied in - their replies come to you. Untick it to make the transmittal without emailing; you can copy each person's link and send it yourself.

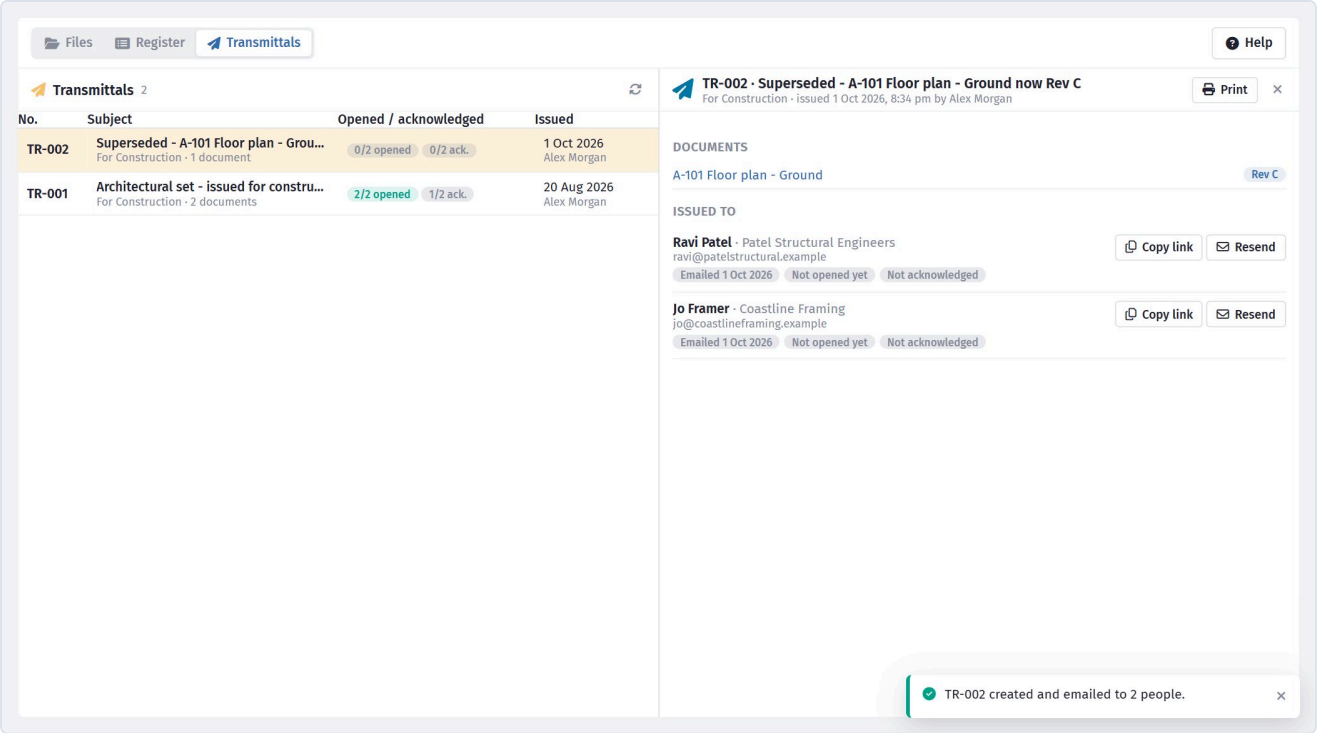
What they receive

Each person gets **their own link** - no login. It opens a page showing the transmittal number, what it is issued for, your message, and the documents exactly as issued, with a viewer and download buttons. At the top is **I have received these**: one click records that they have them, with their name and the time.

If a document they were sent has since been superseded, their page says so beside it.

Tracking

The **Transmittals** view lists every transmittal on the job, newest first, with how many people have opened it and acknowledged it.



Open one to see each person's emails, opens and acknowledgement.

Open one to see, for each person:

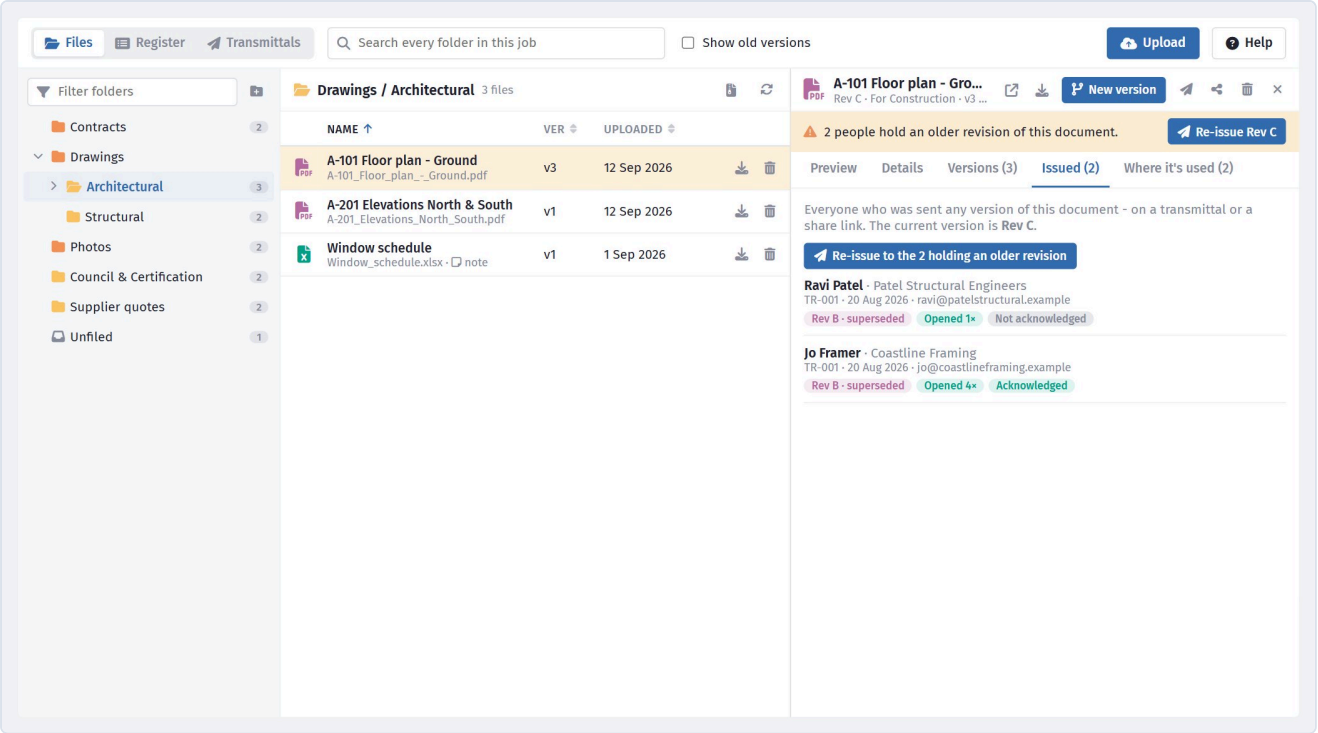
- whether the email went (and why not, if it failed),
- how many times they opened it, and when last,
- whether they acknowledged it.

Copy link puts their personal link on your clipboard; **Resend** emails it to them again.

Print gives the transmittal sheet - documents, revisions, recipients, opens and acknowledgements - to print or save as a PDF for the job file.

Who holds which revision

Every document has an **Issued** tab listing everyone who was sent any version of it, on a transmittal or a share link, and whether what they hold is current or superseded.



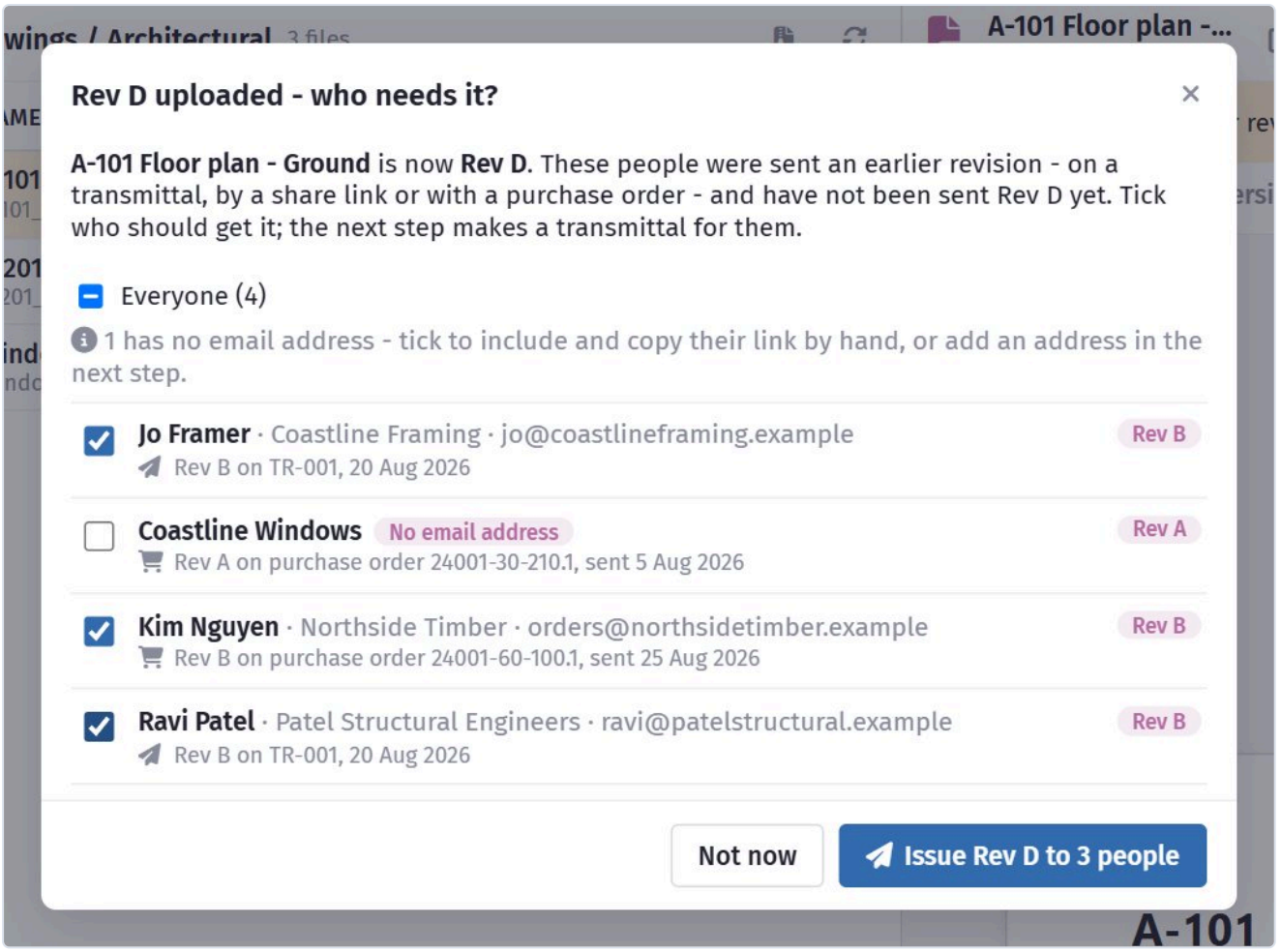
Two people hold Rev B; the current revision is C.

Re-issuing a superseded drawing

When you upload a new version, SmarteBuild works out who still has an older revision and shows them straight away:

- everyone sent it on a **transmittal**,
- everyone sent it by a **share link**, and
- the supplier on every **purchase order that was sent** with it attached.

Orders not yet sent are not on the list - they move to the new version by themselves and go out with it.



Each person once, with every older copy they were sent - here two on a transmittal and two suppliers on purchase orders.

Everyone with an email address is ticked. Untick anyone who doesn't need it, then click **Issue Rev D to 3 people**. The transmittal window opens already filled in - the new revision, those people, a subject saying it is superseded and a message asking them to discard earlier copies. Check it and issue.

Someone with **no email address** (a supplier on an old order, say) can still be ticked. They go on the transmittal like everyone else but are not emailed - copy their link from the transmittal and send it yourself, or add their address in the transmittal window.

Click **Not now** to do it later. Until everyone has the current revision, the document shows a warning - *4 people hold an older revision of this document* - with a **Re-issue** button that opens the same list. The **Issued** tab lists everyone who was ever sent the document, how and which revision.

> **Issued documents cannot be deleted** — A document that has been on a transmittal is part of the record of what was sent, so it cannot be deleted - the **Where it's used** tab lists the transmittal. Upload a new version instead; the old one is kept as an old version.

Transmittals or share links?

Use	When
Transmittal	Issuing drawings or documents someone will build, price or certify from - you want a numbered record, the revision, and an acknowledgement.
Share link	Quickly letting someone look at a file or a folder - with an expiry date or view-only if needed.

15.9 RFIs

Asking the architect, engineer or another consultant a numbered question about the drawings, getting their answer through a link with no login, and recording whether it changes the cost or the time.

An **RFI** (request for information) is a formal question to the architect, engineer or another consultant when the drawings don't agree or don't say: *A-101 shows the window head at 2100 but the elevation shows 2400 - which is right?* Each one gets a number (RFI-001, RFI-002...), a date it should be answered by, and a record of the answer.

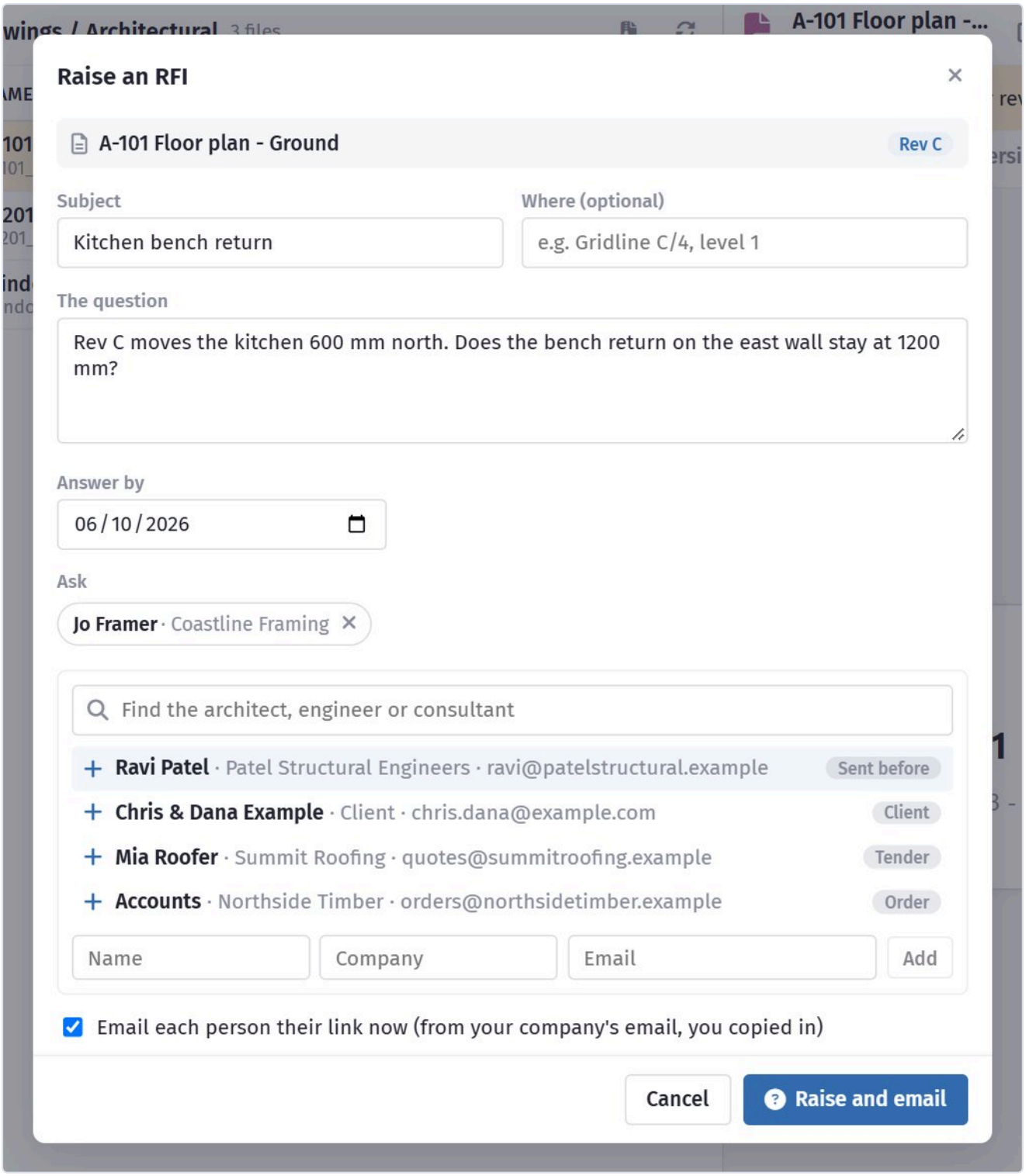
Why it matters

A question asked by phone or in a long email chain is easy to lose, and so is the answer. When an answer changes the work, that is money: extra framing, a deeper footing, a week waiting for a decision. A numbered RFI with a dated answer is what supports the variation or the extension of time afterwards.

Raising an RFI

Two ways in:

- Open the drawing and click the **question mark** at the top - the drawing is attached for you.
- In the **RFIs** view, click **Raise an RFI**.



Field	What it is
Subject	A short name - *Window W4 head height*.
Where	Optional - *Gridline C/4, level 1*.
The question	What you need to know. Say which drawings disagree.
Answer by	The date you need it by. Five days ahead to start with.
Ask	The people. Pick from the list or type someone new.

The list suggests people already connected to the job: anyone you have sent documents to, the client, tender invitees and order suppliers. Type to search all your suppliers and their contacts.

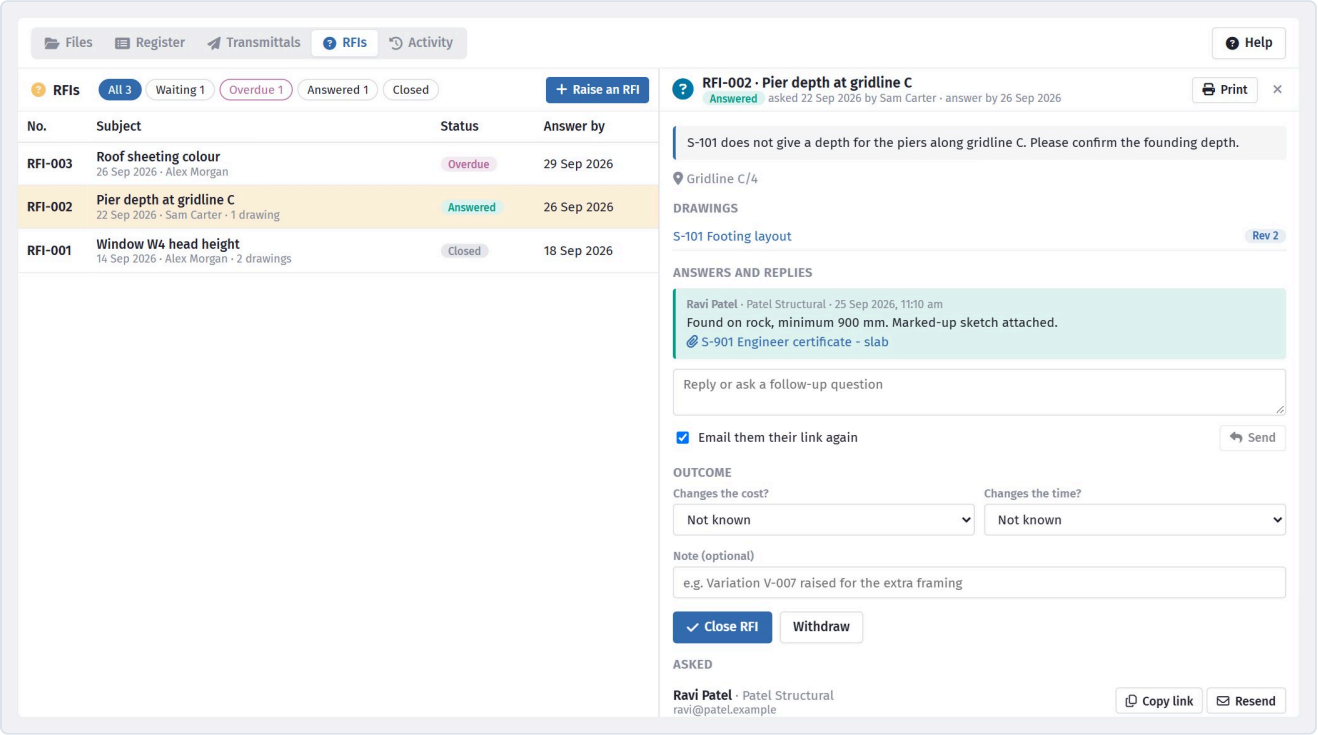
Leave **Email each person their link now** ticked and each person gets an email from your company's address, with you copied in. Untick it to raise the RFI without emailing - you can copy each person's link from the RFI and send it yourself.

What they see

Each person asked gets **their own link** - no login. It shows the question, where, the answer-by date and the drawings (with a viewer and download), and a box for their answer. They can attach files - a marked-up sketch or a revised detail. Those files are saved in the job's **RFIs** folder in Documents.

When they answer, the RFI moves to **Answered** and the person who raised it gets an email with the answer and a link straight to it.

The RFIs view



The list shows every RFI on the estimate, newest first. The buttons along the top narrow it:

Button	Shows
All	Everything.
Waiting	Asked and not answered yet.
Overdue	Not answered and past its answer-by date - shown in pink.
Answered	Answered but not closed.
Closed	Closed or withdrawn.

Click an RFI to open it. You see the question, the drawings, every answer and reply, and who was asked - with when each person opened their link, a **Copy link** button and **Resend**.

To ask a follow-up, type in the reply box and click **Send**. Tick **Email them their link again** to let them know.

Print makes a one-page copy of the RFI, its answers and its outcome - to save as a PDF or put in the site file.

Closing an RFI

When the question is settled, record the **Outcome**:

- **Changes the cost?** - Not known, No or Yes.
- **Changes the time?** - Not known, No or Yes.
- **Note** - optional, e.g. *Variation V-007 raised for the extra framing*.

Then click **Close RFI**. If the answer is that the question no longer matters, click **Withdraw** instead. A closed or withdrawn RFI can be **reopened**.

> **Tip** — If an answer changes the cost or the time because of a client or designer change, raise a variation straight away - and an extension of time if the programme moves. The RFI number is your evidence.

Who can do what

To	You need
See RFIs	Access to the job's Documents
Raise, reply, close	Permission to change documents

Related

- Transmittals - formally issuing the drawings in the first place.
- Restricted folders, upload links and activity - every RFI raised, answered and closed is in the job's activity record.

15.10 Restricted folders, upload links and activity

Limiting a folder to chosen people, letting consultants upload new revisions without an account, and the record of who opened, downloaded, changed and sent every document.

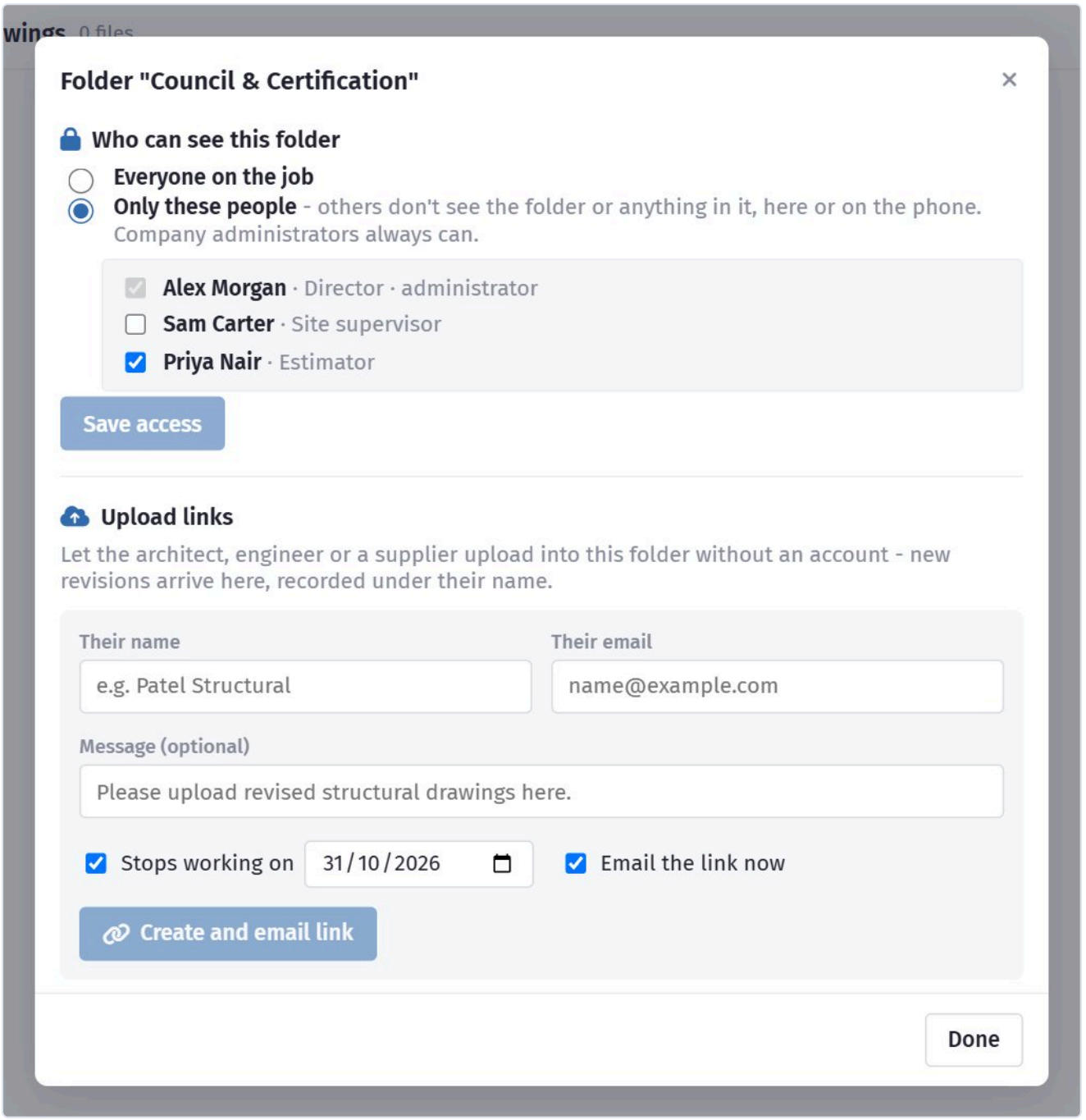
Three tools for keeping control of a job's documents once more people are involved:

- **Restricted folders** - a folder only chosen people can see, such as contracts or commercial correspondence.
- **Upload links** - a link the architect or engineer uses to put new revisions straight into the right folder, without an account.

- **History and Activity** - a record of every upload, view, download, change, share and issue, and who did it.

Restricting a folder

Hover over a folder on the left and click the **lock-and-person** button. The window that opens is in two parts; the top part is **Who can see this folder**.



Choose **Only these people** and tick the people on the job who may see it, then **Save access**. Everyone else no longer sees the folder or anything in it - in the folder list, in search, in the register, in the file picker, and in the phone app. A padlock marks the folder in the list.

- Folders inside a restricted folder are restricted too.

- Company administrators always see everything, and only an administrator can change who sees a folder.
- The standard folders every job has (Drawings, Contracts, Photos...) can't be restricted. Make a folder of your own - *Commercial*, say - and restrict that.
- Files moved into a restricted folder, or uploaded into it, follow its rule. Moving them out opens them up again.

To open the folder up again, choose **Everyone on the job** and save.

> **Careful** — Restricting a folder hides it from people in your company. It does not affect links you have already sent outside - a shared link or a transmittal keeps working until you cancel it.

Upload links

The bottom part of the same window makes **upload links**: a link a consultant, subbie or supplier uses to upload files into this folder without an account. It suits the engineer who sends a new set of drawings every fortnight.

Fill in their name (and email to send it), an optional message, and when the link should stop working - 30 days ahead to start with. Leave **Email the link now** ticked to send it from your company's address, or untick it and use **Copy link**.

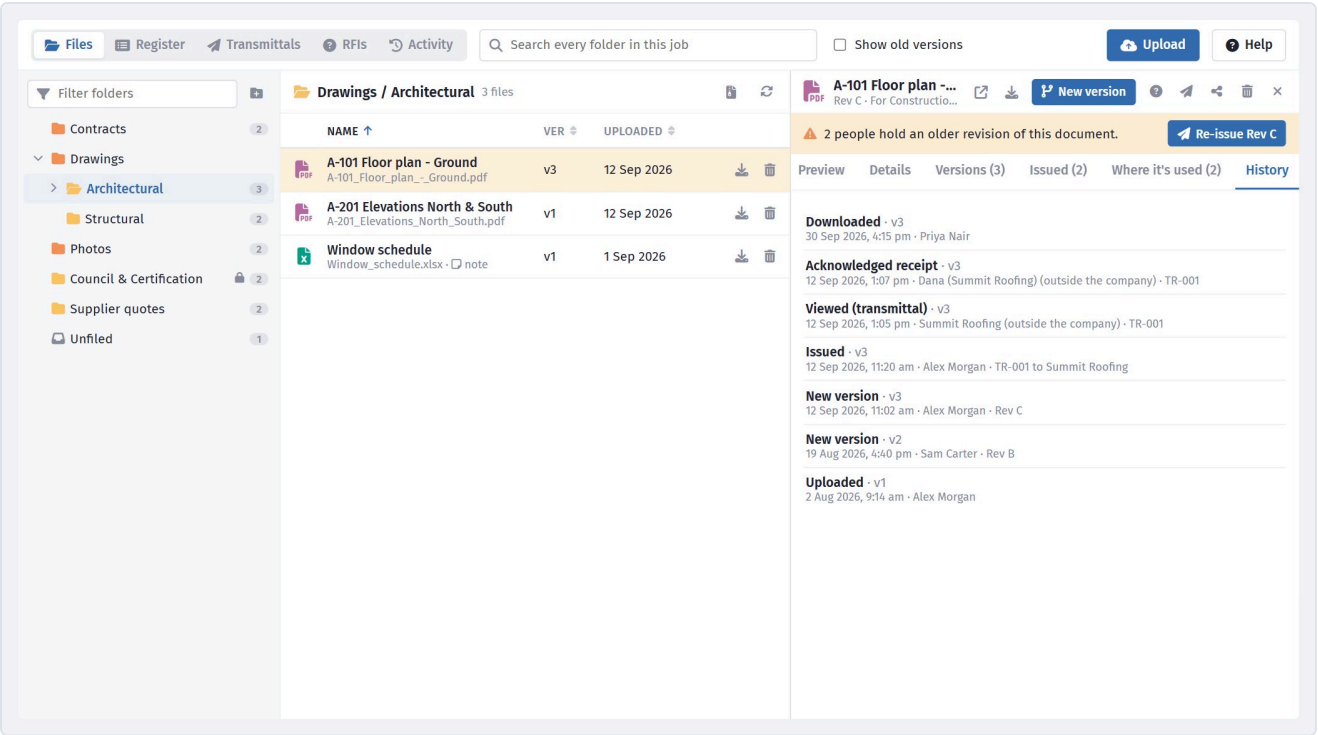
Their page shows your message and a box to drop files into. What they upload:

- lands in this folder, recorded as uploaded **through an upload link** by them;
- has its drawing number and revision read from the file name, the same as your own uploads (so *S-101_RevC.pdf* becomes S-101, revision C, in the register);
- is listed on their page, so they can see what they have sent.

The window lists each link with how many files came through it and when. Click the **cancel** button to stop a link working straight away; files already uploaded stay.

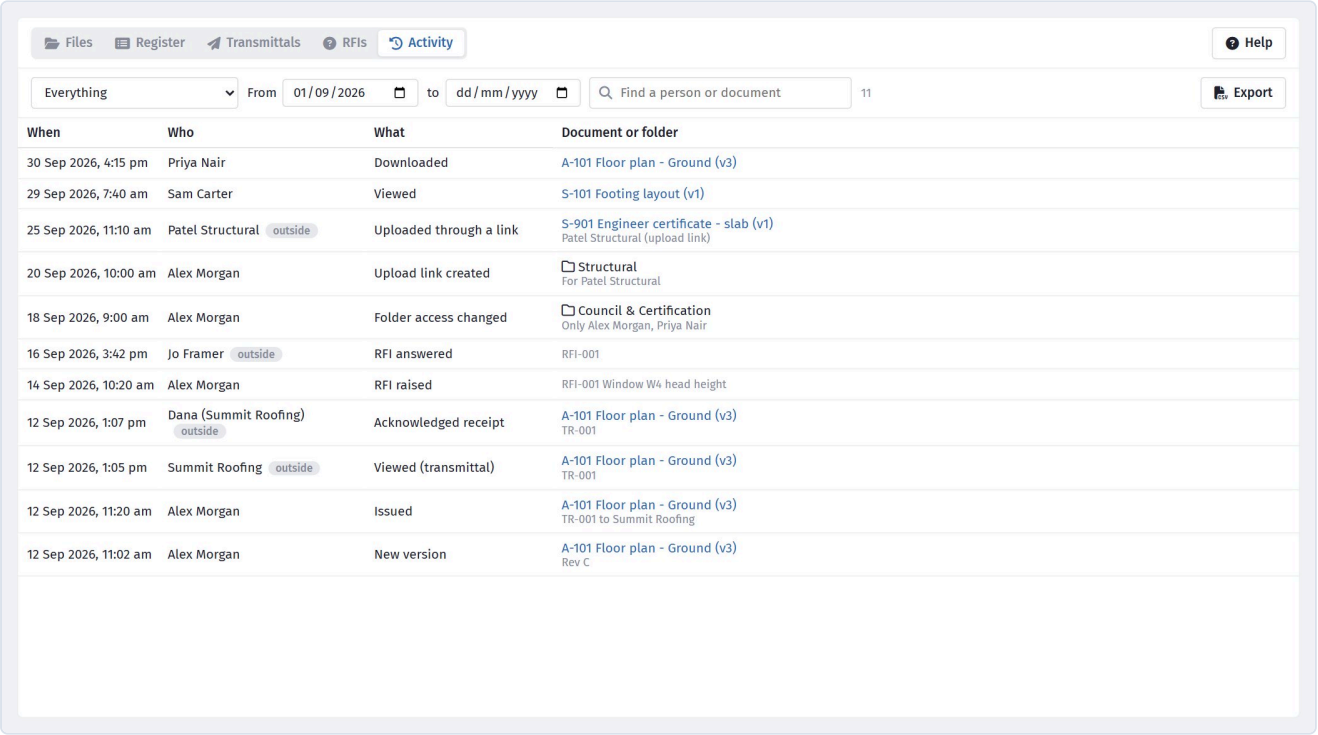
A file's history

Open a file and click the **History** tab. It lists everything that has happened to that document and its earlier versions: uploaded, new version, viewed, downloaded, details changed, moved, issued on a transmittal, opened and acknowledged by the person it was issued to, shared, and so on - newest first, with who and when. People outside the company are marked as such.



The job's activity

The **Activity** view at the top left shows the same record for the whole job.



Control	What it does
Everything	Narrow to uploads, views and downloads, changes, shares and issues, RFIs, or folders and upload links.
From / to	The dates to show. The last 30 days to start with.
Find	A person or a document.
Export	A spreadsheet of what is showing.

Click a document's name to open it. Folders you are not allowed to see are left out.

> **Note** — The record starts from the day this was switched on for your company. What happened to a document before that day is not in it.

Related

- Sharing documents
- Transmittals
- RFIs

CHAPTER 16

Take-Off

16.1 What Take-Off is, and your first measurement

Measure quantities straight off a PDF drawing and feed them into your Bill of Quantities. Includes a full worked example.

Take-Off lets you measure quantities straight off a PDF drawing — counts, lengths, areas — and feed them into your Bill of Quantities. Measure a slab once, and the BOQ item priced against it follows every change you make.

Measure on the drawing and the quantities feed the bill.

Why it's different from a scale rule

Traditionally, taking off means measuring quantities from drawings with a scale rule and writing them into a dimension book. Take-Off does the same job on screen: you open the drawing, tell it what scale the sheet is at, and click along the things you want to measure.

The important part is what happens next. A measurement doesn't just produce a number on the page — it goes into a **take-off field**, and BOQ items can take their quantity from that field. Add a room to your area,

and the concrete, the mesh, the formwork and everything else priced against that field all move with it. Nothing to re-enter, nothing to remember.

In short: you measure once, and everything that depends on the measurement stays correct.

Before you start

You need three things:

- **Access.** Take-Off is still being rolled out, so it is **not in every account's menu yet**. If you cannot see it, contact SmarteBuild — it is switched on company by company, and it is not something your own administrator can enable.
- **Estimate access.** Take-Off works within one estimate at a time, and measures into that estimate's fields. If you can open the estimate's BOQ, you can measure into it.
- **A PDF in Documents.** Take-Off reads drawings from the current estimate's Documents area. Upload the drawing there first — any PDF will do, of any number of pages.

> **A note on scanned drawings** — Take-Off works on scans as happily as on native PDFs, but a scan is only as accurate as the scan itself. If a drawing has been photocopied or printed to a non-standard size, don't trust the printed scale ratio — calibrate the page instead. See Setting the scale.

The four steps, every time

Every take-off you ever do is these four steps in this order.

Step 1 — Open the drawing

Take-Off opens with the last drawing you were working on in this estimate, so most of the time there is nothing to do. The first time, choose **Open PDF** and pick your drawing.

The picker groups drawings by their Documents folder and shows the revision number of each. Superseded revisions are hidden by default — tick **Show superseded** if you need to look at an older one.

Page thumbnails appear down the left. Each shows the page's scale, and a badge with the number of measurements on it.

Step 2 — Set the scale

Choose the ratio from the **Scale** dropdown in the toolbar — 1:50, 1:100, 1:200 and so on. If the drawing isn't at a standard ratio, or you don't trust it, use **Custom…** and calibrate against a known dimension.

Scale is set per page, not per drawing. A 1:20 detail and a 1:200 site plan routinely live in the same PDF, and Take-Off handles that properly.

Step 3 — Choose a take-off field

The panel on the right lists the take-off fields in this estimate, grouped by assembly. Click one to make it active — that is where your measurements will land.

No suitable field yet? **New field** creates one without leaving the drawing.

Step 4 — Measure

Pick a tool and start clicking. The field's total updates as you go, and so does every BOQ item priced against it.

Tutorial: taking off a small house slab

Here is that sequence run all the way through on a real job. We will take off three quantities from a single floor plan — the slab area, the external wall length, and a door count — and price BOQ items against them.

Assume you have an estimate open with a floor plan called `A-101 Floor Plan Rev B` already uploaded to Documents, drawn at 1:100.

1. Open the drawing and check the scale

Open **Take-Off** from the module menu, then **Open PDF** and choose `A-101 Floor Plan Rev B`.

The title block says 1:100, so pick **1:100** from the Scale dropdown. Before you trust it, check it: the plan has a figured dimension of 12 000 along the rear wall. Use the Line tool to drag along it and confirm you get 12.0 m. If you get something else, the sheet has been resized — go to **Custom…** and calibrate instead.

> **Always check one figured dimension** — It takes ten seconds and catches the single most expensive mistake in take-off: a whole job measured at the wrong scale. Every quantity would be wrong by the same factor, and nothing on screen would look unusual.

2. Create a field for the slab

In the fields panel, click **New field**:

Setting	Value
Name	`Slab area`
Unit	**M2**
Assembly	`Concrete`

Click **Create**. The field appears in the panel with a total of `0.00 m²` and a colour assigned to it.

3. Measure the slab

With `Slab area` selected, press `A` for the Area tool and click each corner of the slab outline. Hold `Shift` as you go — the walls are square, and this keeps your lines square too.

At the last corner, press `Enter`. Take-Off closes the shape back to your first point automatically.

The field total now reads something like `186.40 m²`. If you misclicked a corner on the way round, `Ctrl+Z` would have taken it back without losing the shape.

4. Measure the external walls

Create a second field:

Setting	Value
Name	`External wall`
Unit	**M2**
Default height	`2.4`
Assembly	`Brickwork`

Because the field has a **default height**, an M2 field will accept a *length* — Take-Off multiplies what you measure by 2.4 automatically.

Select the field, press `P` for Polyline, and click along the outside face of the external walls, corner to corner, all the way round. Press `Enter` to finish.

You clicked a 54.2 m perimeter; the field reads `130.08 m²`. You never typed 2.4 once.

5. Count the doors

Create a third field:

Setting	Value
Name	`Internal doors`
Unit	**Each**
Assembly	`Carpentry`

Select it, press `C` for Count, and click once on each internal door symbol. The total ticks up with each click. Miscounted one? Switch to Select (`V`), click the stray marker, press `Del` — the rest are untouched, because every count click is its own measurement.

6. Price the BOQ against your fields

Go to the **Bill of Quantities**. On your concrete item, open **Calculate Quantity**, choose the **Fields** tab, and pick `Slab area`. Do the same for the brickwork item against `External wall`, and the door item against `Internal doors`.

That is the round trip closed. Three fields, three items, and from here on the numbers look after themselves.

7. Prove it

Go back to Take-Off, select the slab area, and drag one corner out to add a 600 mm-deep alfresco you had missed. Return to the BOQ.

The concrete quantity has already changed. There is no export step, no recalculation to trigger and no cache to clear.

Where to go next

- Setting the scale — calibration, and what to do with a scan
- The measurement tools — all four tools, editing, and arcs for curved walls

- Take-off fields and the BOQ — units, heights, depths, and how a quantity reaches an item

16.2 Setting the scale

Standard ratios, calibrating a custom scale, re-scaling a page you have already measured, and working on unscaled pages.

Scale is the one setting that can make every number in a take-off wrong at once, and the one nothing on screen will warn you about. It is worth ten seconds of care.

Scale is set **per page**, not per drawing. A 1:20 detail and a 1:200 site plan routinely live in the same PDF, and Take-Off handles that properly.

Set the scale before you measure anything, or every figure is wrong.

Standard ratios

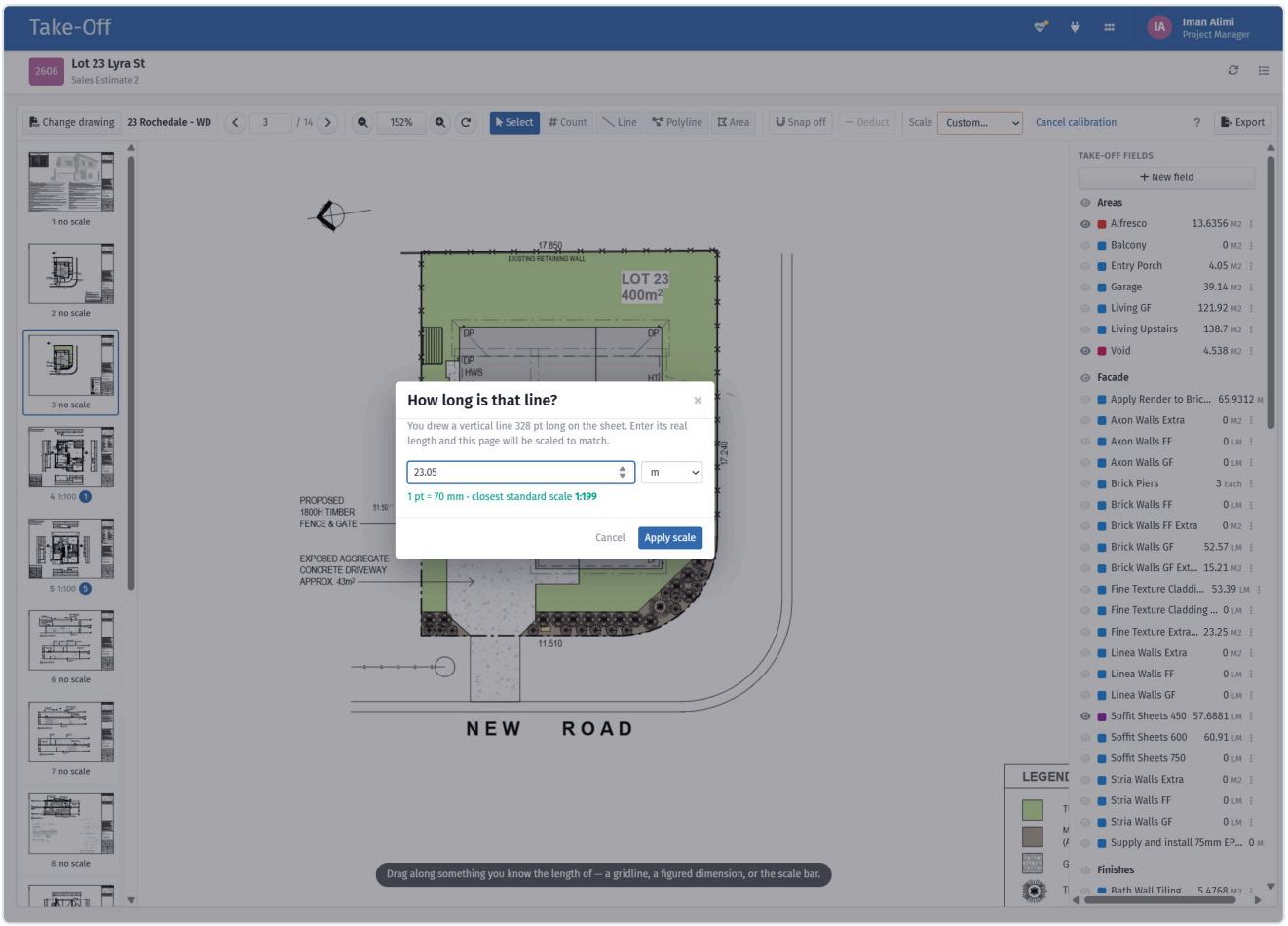
If the drawing states its scale and you trust it, pick the matching ratio from the **Scale** dropdown. This is right the overwhelming majority of the time for native PDFs issued straight from CAD.

Then check it anyway. Find a figured dimension on the sheet, drag the Line tool along it, and confirm you get the number that is printed. If you do, the page is scaled correctly and you can measure with confidence.

Let the AI read it. With AI switched on for your company, a small magic-wand button sits beside the Scale dropdown. Press it and the sheet's title block, scale note or scale bar is read for you: "the sheet says 1:100 @ A1". If the PDF page is a different paper size from the one printed - an A1 drawing issued as an A3

PDF - the corrected scale is worked out (1:200 in that case) and offered with an **Apply** button. Nothing changes until you press it. One press of the month's AI allowance.

Custom scale (calibration)



Calibrate against a dimension printed on the drawing when the ratio is unknown.

Choose **Custom...** from the dropdown, then drag along something on the drawing whose real length you know — a gridline spacing, a figured dimension, a door opening. Type in what that distance actually is, and Take-Off works out the scale from it.

Calibrate rather than trusting the printed ratio when:

- the drawing has been **scanned or photocopied**;
- it has been **printed to a different sheet size** — an A1 drawing issued as A3 is no longer at its stated scale;
- the stated scale simply looks wrong when you check a known dimension.

> **Calibrate along the longest dimension you can find** — Any error in where you click is divided by the length you drag, so a 10 m gridline gives a far better result than a 900 mm door. If the only figured dimension is short, calibrate across several grid bays at once and enter the total.

Horizontal and vertical are calibrated separately

Take-Off calibrates the horizontal and vertical directions **independently**. That matters for scans, which are often very slightly stretched in one direction — a drawing that measures correctly across but 1% out vertically will still give you correct areas.

It is also the fix for the classic scan symptom: areas that look right while lengths do not, or the reverse.

Worked example: calibrating a scanned drawing

A client sends a PDF that is clearly a scan of a printed A3 sheet. The title block says 1:100, but you have no idea what size it was printed at.

1. Choose **Custom…** from the Scale dropdown.
2. Find the longest figured dimension on the sheet. Here it is the overall building width, marked `14 600`.
3. Drag from the outside face of one external wall to the outside face of the other, following the dimension line.
4. Take-Off asks what that distance really is. Type `14.6` and choose metres.
5. Repeat vertically when prompted, using the overall depth dimension — say `9 200`, entered as `9.2`.

Take-Off now reports the derived scale, which might come out at something like 1:141 horizontally and 1:139 vertically. Those are not tidy numbers, and that is exactly the point: the sheet was never at a tidy scale, and guessing 1:100 would have made every quantity roughly 40% light.

Every page at once. On a drawing with more than one page, setting a scale (a standard ratio or a calibration) offers **Apply to all N pages** in the green bar that appears. One click scales the set; pages that already carry measurements are recalculated, with one warning for the lot.

Re-scaling a page you have already measured

Changing the scale of a page **recalculates every measurement on it**. That is almost always what you want — if the scale was wrong, every number taken off that page was wrong too.

But it also means quantities already in your BOQ will move. Take-Off asks you to confirm first, and tells you how many measurements will be affected.

> **Careful** — Read that confirmation. "Re-scaling will update 62 measurements across 4 fields" is telling you that four BOQ quantities are about to change. If that is a surprise, stop and work out why before you continue.

Pages without a scale

Counting works on an unscaled page. Counting doors does not need a scale, so the Count tool is available immediately.

Lengths and areas do need one, so those tools stay disabled until the page is scaled. Hover over a disabled tool and it will tell you why.

Common problems

Every quantity on a page is wrong by the same factor. The page scale is wrong. Check it against a figured dimension; if the drawing has been re-sized or scanned, calibrate rather than using the printed

ratio. Re-scaling the page fixes every measurement on it at once.

Areas are right but lengths are wrong, or the reverse. Almost always a stretched scan. Re-calibrate with **Custom…** — Take-Off measures the horizontal and vertical independently and will correct it.

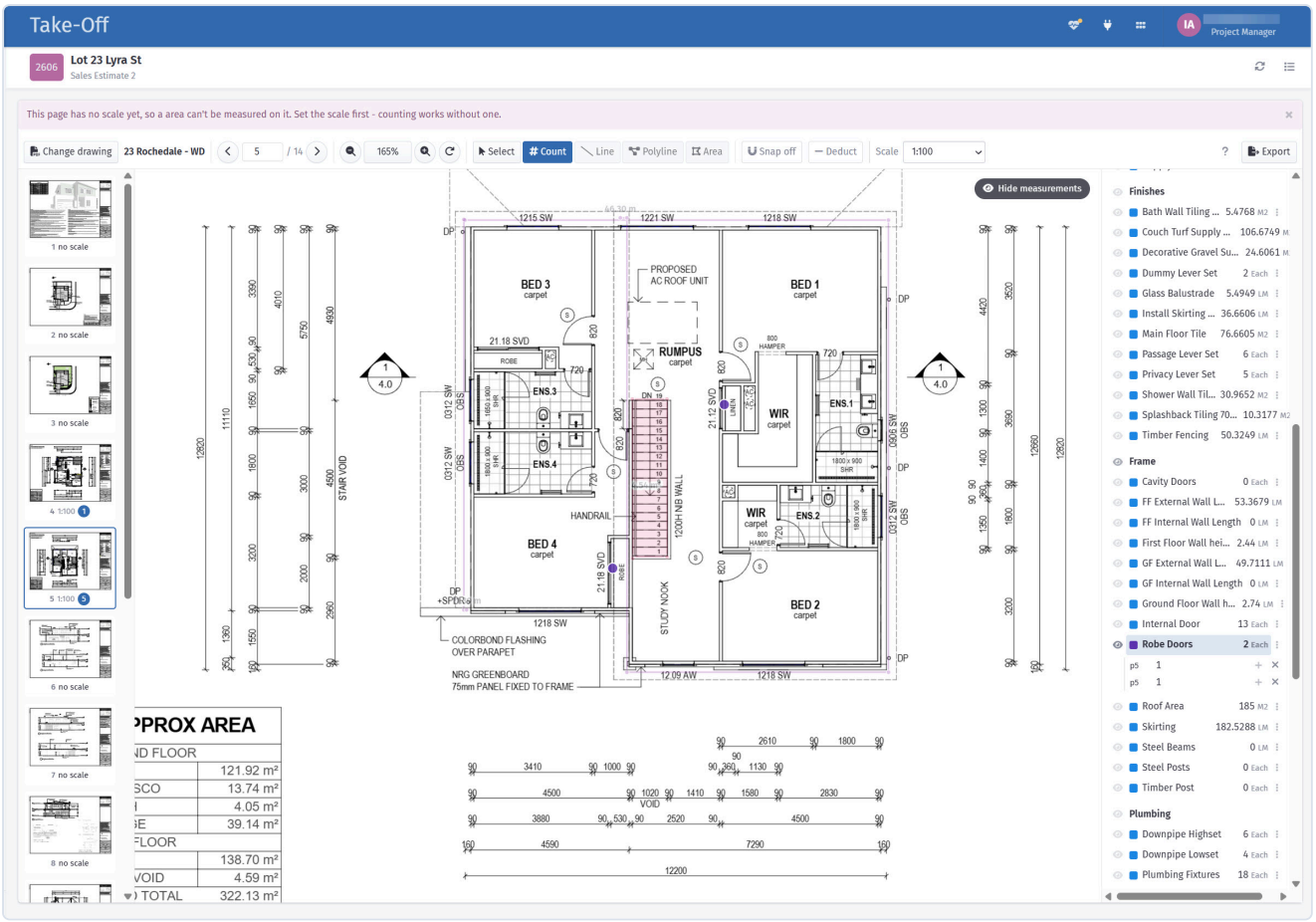
The Line, Polyline or Area tool is greyed out. Usually the page has no scale yet. Hover the tool and the tooltip will say so.

16.3 The measurement tools

Count, Line, Polyline and Area - how to use each accurately, how to edit a measurement afterwards, and how to draw curved walls with arcs.

There are five measurement tools, and a Select tool for changing what you have already drawn.

Tool	Shortcut	How you use it	What it produces
Count	C	One click per item	A number of items
Line	L	Drag from one end to the other	A length
Polyline	P	Click each corner along a run	A total length
Area	A	Click each corner of the shape	An area
Rectangle	R	Click one corner, then the opposite one	An area
Ruler	U	Click each point along a run, double-click to finish	A length to read off — nothing is saved



Length, area, count and rectangle, each feeding a different kind of field.

Count

Click once on each item. Every click is its own measurement, so you can delete a single miscount without disturbing the rest.

Each pin can be worth more than one. In the field's settings, *Each pin counts as* makes one click count as two (twin downlights) — and a count field isn't the only place a pin can go. Set a default factor on a length or area field and a pin into it is one standard piece: 3.6 LM of rail panel, 1.44 m² of window. Until that is set, the Count tool stays off for that field and says why.

Use it for doors, windows, downlights, taps, posts, tie-downs — anything you would otherwise tally on paper.

Line

A single straight length, drawn with one drag. Best for one-off dimensions, and for checking a figured dimension when you are verifying a page scale.

Polyline

Click each corner along a run, then **double-click** or press `Enter` to finish. Use it for anything that changes direction: skirting, footings, kerbs, fencing, wall runs.

Area

Click each corner of the shape, then **double-click**, press `Enter` or press `C` to close it.

Snap to the drawing's lines. The crosshair button beside Snap makes new points jump to the corners and crossings of the PDF's own linework as well as to your shapes, so a click near a wall corner lands on it exactly. Native PDFs only - a scan has no lines to read. Switch it off on a busy sheet if it grabs the wrong line. Take-Off closes the shape back to your first point automatically — you do not need to click it again.

Rectangle

Click one corner, move to the opposite corner — the rectangle follows the cursor with its area in the readout — and click again. Two clicks, not a drag, so you can zoom and pan between them. It is saved as an ordinary area: rooms, slabs, sheets and panels that really are rectangles, without four careful clicks and a double-click.

Ruler: check a length without measuring

Sometimes you only want to know how long something is - does this room take a 3.6 m sheet, how far is the meter box from the switchboard - without it going into any field. That is the **Ruler** (`U`): click each point along the run and double-click (or press `Enter`) at the last one. Each leg shows its own length and the total sits at the end and in the readout. For a straight length, click one end and double-click the other. Nothing is saved, nothing reaches the BOQ, and it needs no field chosen, so it works for people who can only view the take-off. It snaps to the corners of your shapes (and the drawing's lines, if that switch is on) like every other tool, `Shift` keeps a leg straight and `Ctrl+Z` takes back the last point. The line stays on screen until you start another, change page or tool, or press `Esc`. The page needs a scale first, or there is no length to give.

Making it accurate

These five habits are the difference between a take-off you can defend and one you cannot.

- **Hold `Shift`** to constrain to 0° / 45° / 90° from the last point. Walls and slab edges are overwhelmingly square, and this is the difference between a tidy take-off and one that is half a degree out everywhere.
- **Points snap to nearby corners** of measurements you have already drawn, so shapes that share an edge meet exactly rather than nearly. When you want a point that just happens to sit near one you have already placed, press `S` — or the **Snap** button in the toolbar — to switch snapping off. Hold `Alt` to flip it for a single point without changing the setting. The choice is remembered.
- **Zoom in.** The accuracy of a take-off is limited by how precisely you can click, so zoom in on corners rather than working at fit-page.
- **Every leg shows its own length** while you draw, and on the shape you have selected. A mis-clicked corner shows up as one wrong leg the moment it lands, not as a total that is "a bit high" at the end.
- **Pan without losing the shape.** Middle-drag, or hold `Space` and drag, mid-shape. A corner that is off-screen is not a reason to start again.
- **`Ctrl+Z` takes back the last point.** Misclicked a corner? Undo it and carry on, rather than abandoning the shape and starting again. Press it repeatedly to walk back point by point. An arc counts as **one step**, so it comes off whole.

Deducting openings: windows, doors and voids

A wall is rarely a plain rectangle. You measure the whole elevation, and then the windows, the doors and the garage opening have to come back off it. A **deduction** is a measurement that **subtracts** from its field instead of adding to it.

1. Measure the wall as normal.
2. Press `D`, or click **Deduct** in the toolbar. It turns dark orange.
3. Draw the window exactly as you drew the wall — same tools, same snapping, same arcs.

The field total drops by what you drew. Deduct mode **stays on**, so a run of six windows is six shapes and not twelve keystrokes — and it **turns itself off when you change field**, so it cannot quietly carry over into the next thing you measure.

> **A deduction goes into the field that is selected when you draw it** — Take the window out of the wall by having the wall's field active — not a separate "openings" field, which would subtract from the wrong quantity.

A deduction is drawn with a **dashed outline and no fill**, its label carries a minus, and it is genuinely punched out of the shape it sits inside — so a window in a wall looks like a window, not a darker patch. The marked-up PDF export prints it the same way, and the summary page lists it as "Deduct p3".

To turn an existing measurement into a deduction (or back), click the `+ / −` button on its row in the field list. It is the same control the BOQ's calculation sheet uses, and it means the same thing.

It is not only for areas: a run of skirting can have the door openings taken out of it, and a count can be deducted where a schedule double-counts.

Changing what you have measured

Switch to the **Select** tool (`V`) and click a measurement.

Measurements are locked until you switch on Move. Click **Move** in the toolbar, or press `M`. Until then clicking selects a measurement and `Del` still deletes, but dragging does nothing — so a drag you meant as a pan can't shift a wall a few millimetres without you noticing. Move switches itself off when you pick another tool, open another drawing, or press `Esc`; the button and a banner on the drawing show while it is on.

To do this	Do this
Save the marked-up PDF into Documents	The arrow beside **Export** › *Save to Documents* › *Take-off*. Plain **Export** downloads it
Unlock moving	Click **Move**, or press `M`
Move a corner	With Move on, drag the point
Move the whole shape	With Move on, drag one of its edges
Add a corner	With Move on, double-click the edge where you want it
Remove a corner	Click the point, press `Del`
Delete the measurement	Click it, press `Del` with no point selected

Several at once. `Ctrl`+click shapes or rows to build a selection, or drag a box on empty drawing to take everything inside it. A bar appears over the drawing with one action for the lot: delete, move to another

field, set a height, factor or pitch, or flip them between adding and deducting. With Move on, the arrow keys nudge the whole selection (`Shift` for bigger steps) and dragging one selected shape moves them all. A plain click on empty drawing, or `Esc`, clears the selection.

The quantity updates as you drag, and so does anything in the BOQ priced against it.

You cannot reduce a shape below the number of points it needs — an area needs three corners, a polyline two. Take-Off will offer to delete it instead.

> **There is no undo once a measurement is saved** — While you are drawing a shape, `Ctrl+Z` takes back the last point as many times as you need. Once the measurement is finished and saved, there is no undo — select it and adjust it, or delete it.

Curved walls and bay windows: arcs

While drawing a polyline or an area, press `A`. The next two clicks are:

1. a point the arc passes **through**, and
2. the arc's **end**.

The arc is drawn, and the tool goes straight back to drawing straight lines. Anything you had already placed is untouched.

The arc starts wherever your path already is, which is why only two more clicks are needed.

- Press `A` again to back out of the arc without losing the shape. `Esc` cancels the whole shape.
- The hint under your cursor always says which click is expected next.

This is the same gesture PlanSwift uses, so if you have taken off there it should feel familiar.

Worked example: a bay window

You are running a polyline around the external wall of a house that has a bay window on the front elevation.

1. Press `P` and click along the wall until you reach the point where the bay begins. Hold `Shift` to keep the straight runs square.
2. At the start of the bay, press `A`. The hint changes to *"Click a point the arc passes through"*.
3. Click the outermost point of the bay — the middle of the curve.
4. Click where the bay meets the wall again. The arc is drawn.
5. Carry on clicking the remaining straight runs as normal, and press `Enter` at the last corner.

The whole perimeter, curve included, is one measurement with one length.

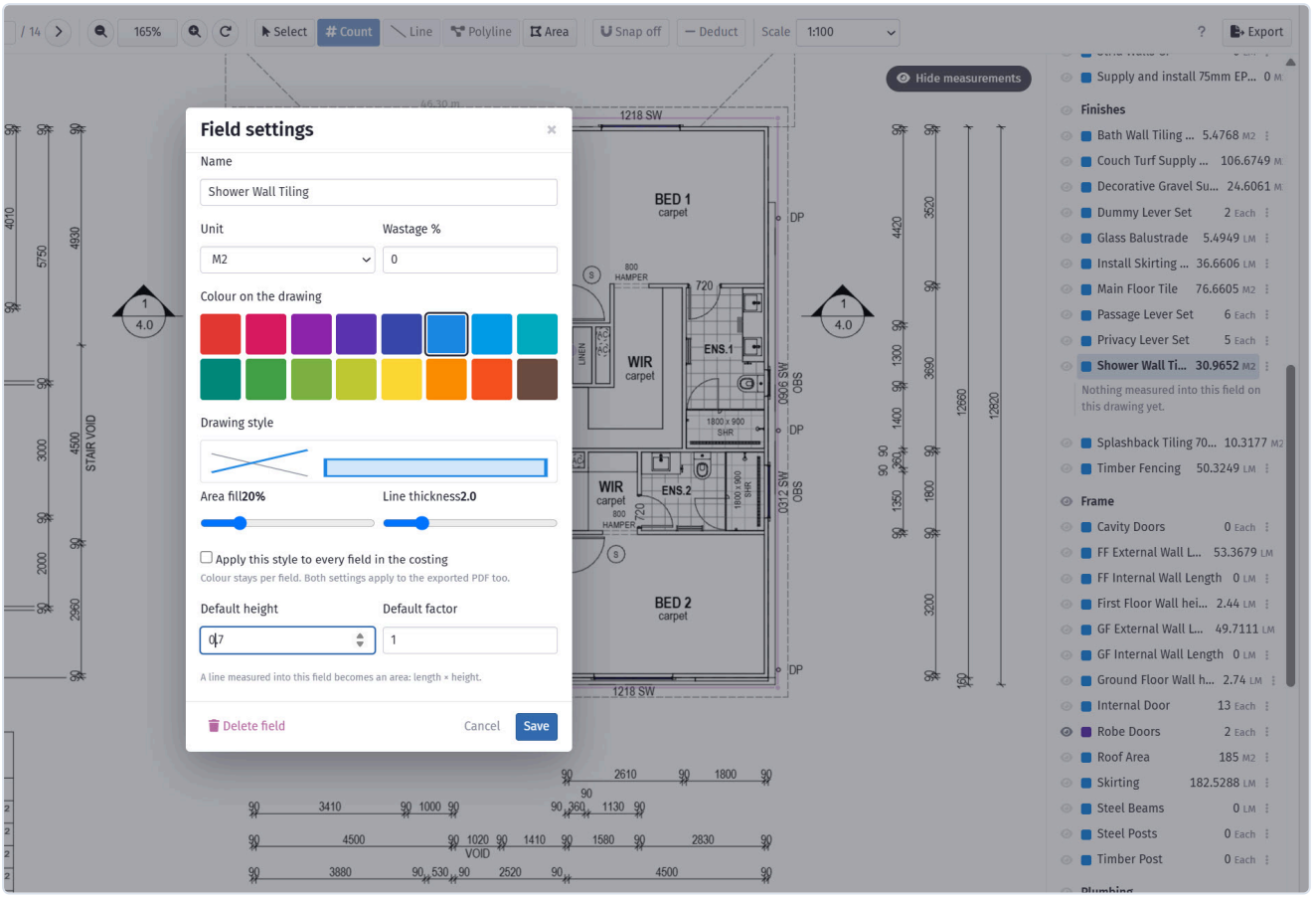
> **Why a finished arc has lots of points** — Arcs are stored as a fine series of points, accurate to well under a millimetre on the sheet. That means an arc can be reshaped point by point like any other measurement — but it also means you cannot grab a finished arc and re-bend it as a single curve. Delete and redraw it if you need it different.

16.4 Take-off fields and the BOQ

What a take-off field is, choosing the right unit, default heights and depths, and how a measured quantity reaches a Bill of Quantities item.

A take-off field is where a quantity lives. Fields belong to **assemblies**, the same ones the BOQ uses, so a field you measure into is immediately available to price against.

This is the part of Take-Off that does the real work. The measuring is just clicking; the field is what makes the measurement useful.



A field is the named measurement the bill reads.

Creating a field

Click **New field** in the fields panel. Give it a name, a unit, and an assembly — or create a new assembly at the same time.

Field settings (the cog on a field's row) has three tabs. *Field*: name, unit, assembly, colour and linked fields. *Quantity*: the default height, factor and pitch that new measurements inherit, and a typed quantity until something is measured. *Appearance*: how transparent areas are and how thick lines are. Anything that does not apply to the unit is simply not shown, and a small ? beside a setting explains it. Save lights up only when something changed.

Choose the unit carefully — it decides what you can measure into it:

Field unit	You can measure
Each	Counts
LM (linear metres)	Lines and polylines
M2 (square metres)	Areas — or lines and polylines, if the field has a height
M3 (cubic metres)	Areas, if the field has a depth
MM (millimetres)	Lines and polylines

If a tool is greyed out, hover it: Take-Off will tell you exactly why that combination cannot produce a quantity in that unit.

Finding your way round the list

Fields sit under their assembly. Click an assembly's heading to fold it up or open it again, or use **Collapse all** / **Expand all** above the list; the folds are remembered for you on this estimate. The box under the heading filters as you type and shows every match whatever is folded. Hover a field for its eye (hide it on the drawing) and its settings (···); the assembly's own eye hides or shows every measured field in it at once.

Starting from a template

Import fields from a template... under + *New field* lists your company's template estimates. Pick one and its assemblies and fields come across — Slab, Footings, Framing, Roof, each with its unit, colour, default height and pitch, and any links between them. Fields already here with the same name are left alone, and no measurements come with it. Mark any estimate as a template in Projects to make it available here.

Prices beside the fields

Press the **$** button above the fields list to see what the BOQ items priced off each field come to at its quantity right now, with each assembly heading totalling its fields. Draw another wall and the figure moves with it. It is the BOQ totals bar's own arithmetic - included items x quantity x price. Press it again to hide the figures; it remembers your choice. It is off to start with and only offered to people who may see costs in the BOQ. The two arrow buttons beside it collapse or expand every assembly.

Measuring into an assembly kit

Import › Assembly kit from the library... adds one of the BOQ's assembly kits - a set of priced items driven by a measurement, such as a brick veneer wall or a bathroom fit-out - and lands you on its first field. Measure into that field and every item in the kit is quantified and priced as you go. The kit's fields join the list under their own assembly; a field already in the estimate with the same name is reused, so nothing is measured twice.

Quantities from a Revit model

If the architect works in Revit, the quantities the model already knows - wall areas, slab volumes, door counts - can land straight in your fields. Ask for a schedule export: in Revit, File › Export › Reports › Schedule from a *Material Takeoff* or a multi-category schedule with one row per type and its Count,

Length, Area or Volume as columns (CSV, or tab-delimited text on any Revit version). Then **Import › Quantities from Revit...** above the field list: drop the file, and each Revit type is shown with its quantity beside a field box. Type to find the field; a **SmarteBuild Field** column in the schedule (or *Type Comments* holding a field name) fills it in by itself, and so does last time's choice - the mapping is remembered for your company. Tick *Create a field for each unmatched row* to make new fields in one assembly. **Apply** writes each figure as the field's typed quantity, marked *From Revit* with the file name and date. A field with drawn measurements keeps its drawing's quantity and is skipped. When a revised model arrives, import the new export the same way and the fields update.

Heights and depths

Set a **default height** on a field to turn lengths into areas automatically — a wall run measured into an M2 field becomes length × height. Set a **default depth** on an M3 field to turn areas into volumes.

This is what saves you typing 2.4 onto every wall in the building.

Pitch: roofs, rakes and sloped slabs

A field can carry a **pitch** in degrees (its settings, under the height). Anything drawn flat on the plan into that field is multiplied by 1 ÷ cos(pitch), so the quantity is the sloped one: 10 × 10 m of roof plan at 30° is 115.47 m², not 100. Type the degrees, or type the rise and run the drawing gives you — 6 / 12 becomes 26.57°. Values on the drawing and in the list carry a small ▲30° mark so a pitched number is never mistaken for a flat one. Counts are never pitched.

One shape at a time. The field's height and pitch are defaults. The pencil on a measurement's row opens a small dialog with its own name, height (or depth) and pitch, for the one roof at 30° among 22.5° ones or the one wall taller than the rest. Blank means the field's. Own values show in blue in the list, e.g. *h 2.7 ▲30°*; the field's defaults show in grey.

Linked fields: draw once, count in several

A field can be **fed by** other fields (its settings, Field tab, under *Linked fields*). Trace the external wall once into *Wall length* and set *Studs*, *Plates*, *Plasterboard* and *Paint* to be fed by it: their totals fill themselves, each converted to its own unit — a length feeding a square- metre field is multiplied by that field's default height (or the shape's own) — and multiplied by a factor you choose (×2 for both faces of a wall). The shapes stay where you drew them; the fed fields just count them. Move or delete the wall and every fed field follows. A fed field is marked with a link icon, its list says what feeds it, and it never offers a typed quantity. A field can't feed itself or anything that already feeds it.

Worked example: three fields off one floor plan

Field	Unit	Height / depth	Tool you use	What you get
`Slab area`	M2	—	Area	186.40 m²
`Slab concrete`	M3	Depth `0.1`	Area	18.64 m³
`External wall`	M2	Height `2.4`	Polyline	130.08 m²

Notice the second row. You draw the same slab outline, but because the field is M3 with a 100 mm depth, it returns a volume instead of an area. Two fields, two units, one shape traced twice — and both follow any

change you make later.

One field, one drawing

A field accumulates measurements **across as many pages of one drawing as you like** — a slab spanning three sheets is one field.

It cannot span *two different drawings*. If you try, Take-Off will tell you which drawing the field is already measured on. Use a separate field instead — this keeps it unambiguous which drawing a quantity came from, which is what you want when someone queries a number six weeks later.

Getting to a field measured on another drawing

Because a field belongs to one drawing, you will often see a field with a quantity against it while the drawing in front of you has nothing drawn for it. Those fields are marked with a small **PDF icon** in the list.

Select one and Take-Off tells you where its measurements actually are — *"12 measurements are on A-102 First Floor Plan"* — with a button to **open that drawing**. It switches, goes straight to the first page the field is measured on, and switches the field back on if you had it hidden. Double-clicking the field does the same thing.

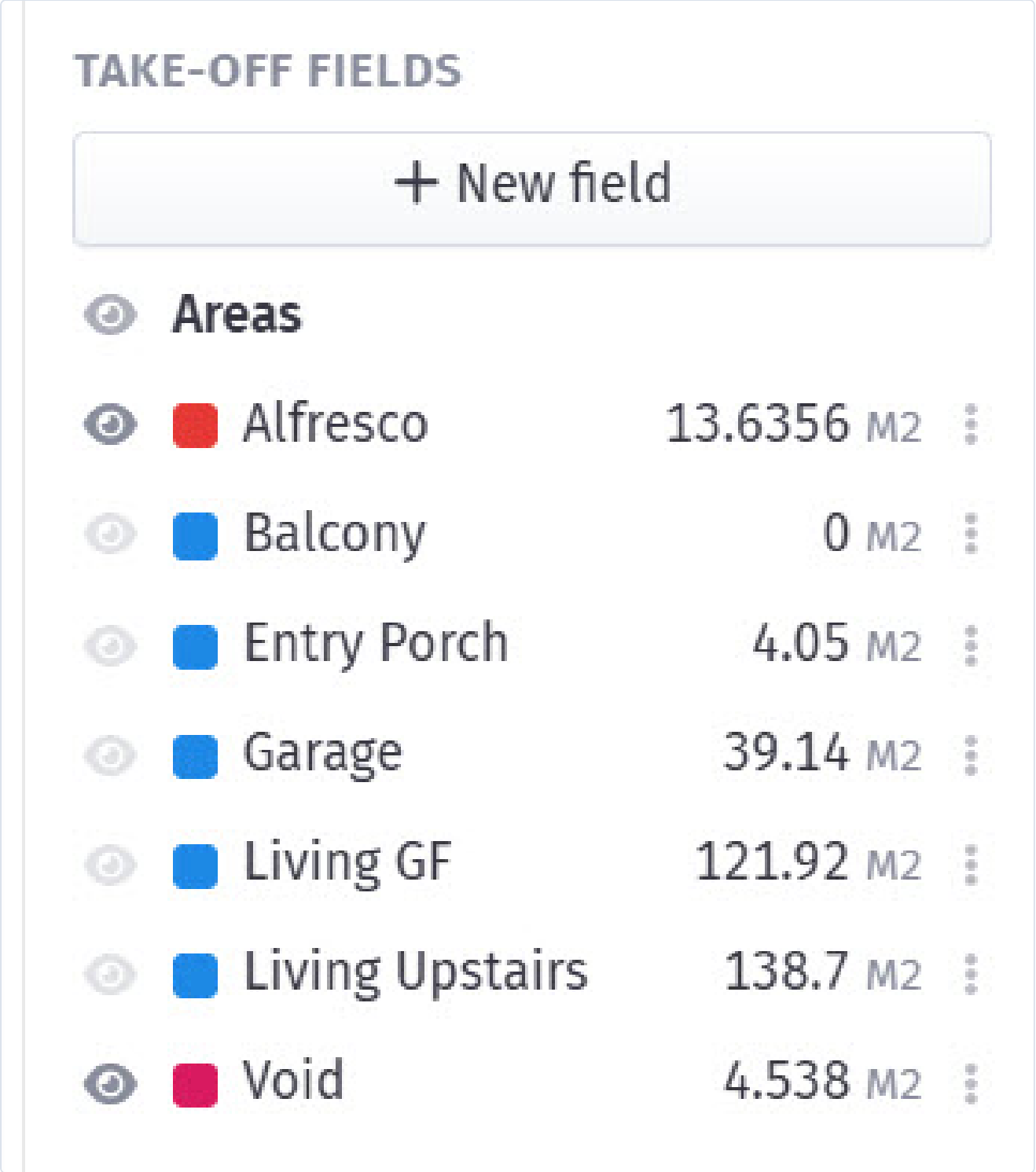
Moving a field to another assembly

Open the field's settings (the ··· on its row) and pick a different **Assembly**. The field keeps its number, so its measurements, its quantity and any BOQ items priced against it all move with it. It is the same move the BOQ's Measurements window does with **Move to**, without leaving Take-Off.

A quantity without a drawing

A field with nothing measured into it can carry a quantity you simply know — an allowance, a count off a schedule, a figure from the engineer. Select the field and type the number in the box under it (or in its settings), and it flows into the BOQ like a measured one. The first measurement you draw into the field replaces it; from then on the drawing owns the number. Formula fields don't offer the box.

The field list



Every field on the drawing, with its running total.

Each field shows its running total and its unit. Expand one to see every measurement in it, with the page it is on.

Finding a field. Type in the box under **+ New field** and the list filters as you type, on the field's name or its assembly's. `Esc` clears it.

Naming a measurement. Every row starts as its page number — p1, p1, p1. Double-click the row, or click its pencil, type a name — "Bed 1", "North wall" — and press `Enter`. The name replaces the page number in

the list (the page is still in the tooltip) and is written on the drawing beside the value.

Which one is this? Click a row and that measurement is highlighted on the drawing — going to its page first if it is on another one. It works the other way too: with the Select tool, click a shape on the drawing and its row lights up in the list, opening its field if need be. Double-click the field itself to go to the first page it appears on.

Getting the quantity into the BOQ

Measuring for a specific BOQ item

From the BOQ, open an item's **Calculate Quantity**, choose the **Fields** tab, and click **Measure on the plan**.

Take-Off opens with that item in mind. Measure into an existing field or create a new one, and when you press **Done** the item is pointed at that field. Its quantity then follows every future measurement, with nothing else to run.

Pricing against a field you have already measured

In the same **Fields** tab, just pick the field from the list.

How the quantity reaches the BOQ

The BOQ reads the field's quantity **live**. There is no export step, no recalculation to trigger and no cache to clear — change a measurement and the BOQ is already right.

A field with a formula

If a field gets its quantity from a formula, that formula is its source of truth. Take-Off shows it as read-only and will not measure into it. Clear the formula first if you want to take the field off a drawing instead.

Deleting a field

Use the field's settings dialog. If BOQ items take their quantity from that field, Take-Off refuses and names them — silently orphaning a priced quantity is the worst thing it could do. Re-point those items first.

Deleting a whole assembly

The bin on an assembly's heading in the fields panel deletes the assembly, every field in it and all their measurements in one go. Take-Off checks first. If any BOQ item works out its quantity from one of those fields - linked to it, or using it in its quantity formula - nothing is deleted: the warning names each field and the items that use it, so you can point them somewhere else in the BOQ and try again. Otherwise it tells you how many fields and measurements will go and waits for you to press **Delete assembly**. A field in another assembly that was linked to one of these loses that share and updates on its own.

Common problems

I cannot measure into a field. Either it gets its quantity from a formula, which takes priority, or it is already measured on a different drawing. Take-Off names the drawing when it refuses.

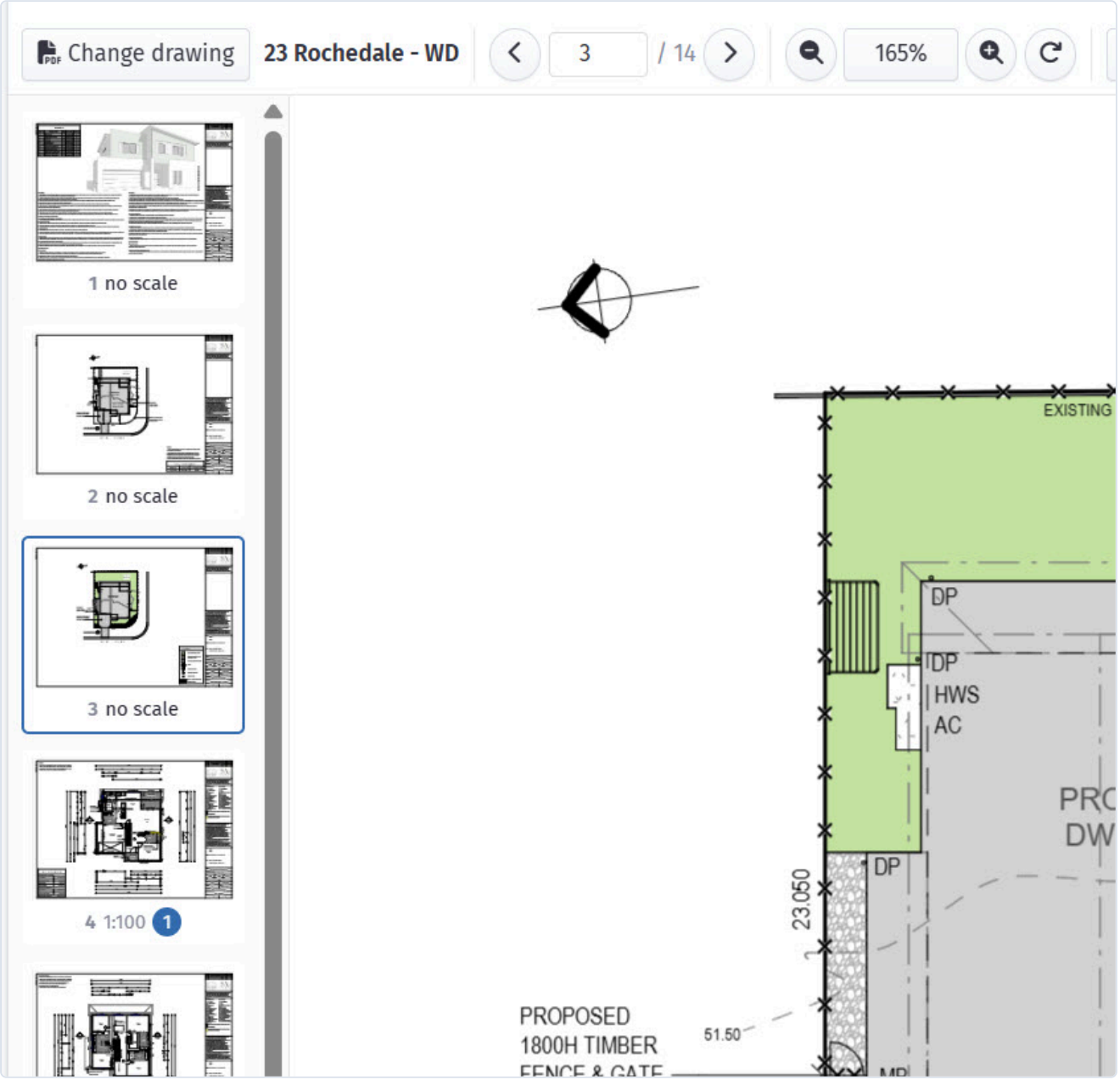
A quantity in the BOQ did not change when I measured. Confirm the item is actually set to take its quantity from that field: **BOQ → Calculate Quantity → Fields**.

A measurement has vanished. Check whether its field is hidden — look for the *"n fields hidden"* link at the top of the fields panel. Also check you are on the right page; the thumbnail badges show which pages carry measurements.

16.5 Drawings, revisions and export

Hiding pages you will never measure, carrying a take-off onto a re-issued drawing, exporting a marked-up PDF, and setting field colours and line style.

Everything in this article is about the drawing rather than the measuring: keeping the page rail tidy, moving a take-off onto a new revision, and producing a marked-up PDF you can send to someone.



Move between pages of a drawing set from the thumbnails.

Hiding pages you will never measure

A drawing set usually carries pages there is nothing to take off: general notes, specification text, a title sheet, photographs. Paging past them all day is friction you do not need.

Hover a page thumbnail and click the eye icon to hide it. It disappears from the rail, and the page arrows skip straight over it.

> **The PDF is never changed** — Hiding is a Take-Off setting, nothing more. The page is still in the file in Documents, still there for everyone else, still printed and still issued. You are only tidying your own measuring view.

Hidden pages come back whenever you want. Once anything is hidden, the top of the page rail offers **"N pages hidden — show"**; turn it on and they reappear, greyed out, each with an eye icon to restore it. The page counter also reads **"/ 24 (19 shown)"** so the difference is never a mystery.

A page with measurements on it cannot be hidden

If you try, Take-Off refuses and tells you how many measurements are in the way.

That is deliberate. A hidden page's measurements would go on counting toward the field's quantity — and so toward the BOQ — while being invisible and unreachable. A number you cannot trace back to anything on a drawing is worse than no number at all. Delete the measurements first if the page really is not one you meant to measure.

Is this shared with my colleagues?

Yes — unlike hiding a *field*, which is your own view only. "Page 12 is a notes sheet" is a fact about the drawing rather than a personal preference, so hiding it once spares everyone on the estimate the same nuisance.

When a drawing is re-issued

Drawings change. When you open a revision of a drawing you had previously measured on, Take-Off notices and offers to carry your take-off forward:

> **Carry take-off over to A-101 Rev C?** *A-101 Rev B* has **34 measurements** across 3 pages for **5 fields**. Copy them onto Rev C?

Carrying over copies every measurement onto the new revision, in the same place, and moves your quantities with them. Nothing on the old revision is changed or deleted.

This is never automatic. A re-issued drawing may have changed exactly where you measured, so Take-Off asks every time.

Reviewing what came across

Carried measurements arrive **flagged for review** — drawn with a dashed orange halo, and counted in a banner at the top of the fields panel:

> 18 carried measurements need review — the drawing may have changed.

Work through them against the new drawing. Adjusting a measurement clears its flag automatically; if it is still correct, use **Confirm on this page** or **Confirm all**.

> **Take the review seriously** — The whole point of a revision is that something changed. Confirming all without looking is the one way this feature can quietly put a wrong number in your BOQ.

If the page numbers have changed

If the new revision has gained or lost a sheet, expand the page mapping and tell Take-Off where each page should go. Pages you do not map are skipped and reported back, rather than guessed at.

Declining

Not now dismisses the offer for this session. **Never for this drawing** remembers. Neither deletes anything — the old take-off stays exactly where it is.

Printing and sharing a marked-up drawing

Export produces a PDF of the drawing with your measurements drawn on it.

- Only the **pages that carry measurements** are included. A 40-page drawing set with measurements on three sheets exports as three sheets.
- With a field selected, you export just that field. With none selected, you get everything measured on the drawing.
- Each page carries a small legend: the page number, its scale, and a colour swatch and subtotal for each field on it.
- A **summary page** lists every measurement by page, with the field totals.

The original drawing underneath stays sharp and searchable — the overlay is drawn as vector, not as a picture of your screen — so the export prints exactly as crisply as the drawing did.

This is the document to attach to a query, send to a subcontractor, or keep on file to show how a quantity was arrived at.

Colours and drawing style

Each field has its own colour, so you can see at a glance what has been measured and what has not. Take-Off assigns a new field the next unused colour in the estimate; change it from the field's settings.

In the same dialog:

- **Area fill** — how solid area shading is, from outline-only to solid.
- **Line thickness** — how heavy the lines are.

Both matter more than they sound. The overlay sits on top of a drawing you still need to read *through*: a sparse site plan takes a solid fill happily, a dense services layout does not. The dialog shows a live sample over some drawing linework so you can judge it.

Both settings apply to the exported PDF as well, so what you see on screen is what prints. Tick **Apply this style to every field in the estimate** to set them everywhere at once — colours stay per field, since telling fields apart is what they are for.

Hiding a page's measurements to see the drawing

The eye at the **top-right of the drawing** (or H) hides every measurement on the page you are looking at, so you can read the plan underneath. Press it again to bring them back. The thumbnail keeps its count, marked with an eye-slash, so a page that looks empty isn't mistaken for one.

This is a **view setting for you only** — nothing is deleted, no quantity changes, the export still includes them, and colleagues still see them. The field you are measuring into stays visible while the page is hidden, so what you draw is never invisible and everything else stays out of the way until you show it again.

Bringing one field back. While the page's measurements are hidden, the eye on a field's row in the list switches that one field on for this page, so you can look at the drawing with only the fields you choose. Click it again to hide it again; showing the whole page again clears those choices.

This page only. The switch above the field list narrows the list to the fields that have a measurement on the page in front of you. The field you are measuring into always stays listed.

It is different from hiding the *page* (the eye on the thumbnail), which removes a non-drawing sheet from Take-Off for everyone.

Hiding a field

The eye icon next to a field hides it on the drawing. Useful for seeing what is underneath a dense area.

The eye on an assembly heading does the whole group at once — one click to take every measured field in that assembly off the drawing, another to bring them back. It follows the group: while any field in it is still showing, the button hides them all; once they are all hidden, it shows them all.

Hiding is a **view setting for you only**. It changes no quantity, and colleagues looking at the same estimate still see the field. Hiding the field you are measuring into also stops it being the active one — otherwise every shape you drew would vanish the moment you finished it.

Measure with AI (pilot)

When it is switched on for your company, the top of every field's list has a **Measure with AI** button. Press it and the AI looks at the page in front of you and proposes measurements for that field — its name, unit and default height are the brief, and anything you have already measured into it shows what "one of these" looks like on this drawing.

Proposals arrive **orange and marked for review**, exactly like measurements carried over from an earlier revision, and **they don't count toward the field until you accept them**.

- The banner quotes what the AI read the field as. If it read it wrong, type a hint ("only the garage") and press **Try again**.
- Tick or cross each proposal in the list, or **Accept all** / **Discard run** from the banner. Drag corners first if a shape is nearly right.
- The counter under the button shows how much of the month's allowance is used. Every press counts, whether you keep the result or not.

Auto-count. For a count field there is a second button, **Find all like this**. Press it, draw a box around *one* example of the symbol on the drawing (click one corner, then the opposite), and the AI puts a pin on every match on the page — the example included. It looks at the page in close-up parts, then takes a second look at each thing it found before pinning it, so a run takes half a minute or so. The pins arrive marked for

review like everything else the AI proposes, so a wrong one is one click to cross out. It counts as one press of the month's allowance.

> **What is sent** — Each press sends an image of the page to the AI service. Nothing is sent unless you press the button, and the feature is off unless your company has asked for it.

16.6 Keyboard reference and troubleshooting

Every keyboard and mouse shortcut in Take-Off, how take-off works alongside colleagues, fixes for common problems, and frequently asked questions.

Press ? anywhere in Take-Off for the shortcut list on screen.

Keyboard and mouse reference

Tools

Key	Tool
V	Select
C	Count
L	Line
P	Polyline
A	Area

While drawing

Key	Action
`A`	Start an arc for the next segment
`Shift`	Constrain to 0° / 45° / 90°
`S`	Snapping on/off
`Alt`	Hold to flip snapping for one point
`R`	Rectangle tool — an area in two clicks
`U`	Ruler — read a length off the drawing, nothing saved
`D`	Deduct on/off — the shape subtracts instead of adding
`Ctrl+Z`	Undo the last point (an arc undoes whole)
`C`	Close the shape — an area finishes, a polyline runs back to its first point
`Enter` or double-click	Finish the shape
`Esc`	Cancel the unfinished shape and go back to Select

Editing (Select tool)

Action	Result
`Ctrl`+click a shape or a row	Add it to the selection (or take it out)
Drag on empty drawing	Rubber-band: select every shape inside the box (`Ctrl` adds)
Arrow keys, with Move on	Nudge the selection 1 pt; `Shift` = 10 pt
Click a row in the field list	Show that measurement on the drawing (goes to its page)
Click a shape on the drawing	Highlight its row in the field list
Double-click a row, or its pencil	Name the measurement
`M`	Move on/off — the three drags below only work while it is on
Drag a point	Move that corner
Drag an edge	Move the whole shape
Double-click an edge	Add a corner
`Del`	Delete the selected corner, or the measurement

Navigation

Input	Action
Mouse wheel	Zoom about the cursor
Overlay (toolbar, only on a drawing that replaced an earlier revision)	Draws the previous revision in red under the page: unchanged lines go dark, removed things stay red, new things stay black
Middle-drag, or `Space`-drag	Pan
`+` / `-`	Zoom in / out
`0`	Fit the page
`PgUp` / `PgDn`	Previous / next page
Double-click a field	Go to the first page it is measured on
`H`	Hide / show this page's measurements (your view only)
`?`	Help

Working alongside colleagues

- **Anyone with access to the estimate can measure, and can change anyone's measurements.** There is no locking and no ownership. Take-off is collaborative work, and someone waiting for a colleague to release a drawing helps nobody.
- Every measurement records **who created it and who last changed it**, so the history is there when a number is queried.
- **Two estimates can measure the same drawing** without seeing each other. A shared standard detail can be taken off separately by two jobs, with separate scales and separate quantities.
- **Hiding a field, and dismissing a carry-over offer, are personal** to you. Everything else is shared.

Troubleshooting

The Line, Polyline or Area tool is greyed out. Hover it — the tooltip says why. Usually the page has no scale yet, or no field is selected, or the selected field's unit cannot be produced by that tool.

I cannot measure into a field. Either it gets its quantity from a formula, which takes priority, or it is already measured on a different drawing. Take-Off names the drawing when it refuses.

My quantities look wrong by a consistent factor. The page scale is wrong. Check it against a figured dimension on the drawing; if the drawing has been re-sized or scanned, calibrate rather than using the printed ratio. Re-scaling the page fixes every measurement on it at once. See Setting the scale.

Areas are right but lengths are wrong, or the reverse. Almost always a stretched scan. Re-calibrate with **Custom…** — Take-Off measures the horizontal and vertical independently and will correct it.

The drawing will not open. Check it is a real PDF and not a renamed image or an office document. Very large drawings can take a few seconds on a slow connection.

A measurement has vanished. Check whether its field is hidden — look for the *"n fields hidden"* link at the top of the fields panel. Also check you are on the right page; the thumbnail badges show which pages carry measurements.

A quantity in the BOQ did not change when I measured. Confirm the item is actually set to take its quantity from that field: **BOQ → Calculate Quantity → Fields**.

My measurements are dashed with an orange outline. They were carried over from an earlier revision and are waiting for you to check them against the new drawing. See Drawings, revisions and export.

Frequently asked questions

Does Take-Off change my drawing? No. The PDF in Documents is never modified. Measurements are stored separately and drawn over the top.

Can I measure the same drawing in two different estimates? Yes, and they stay completely separate — separate scales, separate quantities. Neither can see the other.

What happens if I delete a drawing from Documents? Its measurements go with it. Export a marked-up copy first if you need a record.

Can I measure in imperial? Measurements are metric. The scale ratios are unitless, so an imperial drawing can be calibrated with **Custom…** by entering the known distance in metres.

Is there a limit to how much I can measure? No practical limit. Take-Off handles large drawing sets and long lists of measurements without slowing down.

Can I copy a take-off to another estimate? Not directly. Take-off is tied to the estimate's fields and drawings. Duplicating the estimate carries the BOQ structure but not the measurements.

Why is a finished arc made of lots of small points? Arcs are stored as a fine series of points, accurate to well under a millimetre on the sheet. It means an arc can be reshaped point by point like any other measurement — but it also means you cannot grab a finished arc and re-bend it as a single curve. Delete and redraw it if you need it different.

Can I get rid of the notes pages? Hover the thumbnail and click the eye icon. It is hidden from Take-Off only — the PDF in Documents is untouched, and you can bring it back at any time.

Can I undo? While you are drawing a shape, yes — `Ctrl+Z` takes back the last point, as many times as you need. Once a measurement is saved, there is no undo: select it and adjust or delete it instead.

Who can see my take-off? Anyone with access to the estimate. Take-off is shared work.

CHAPTER 17

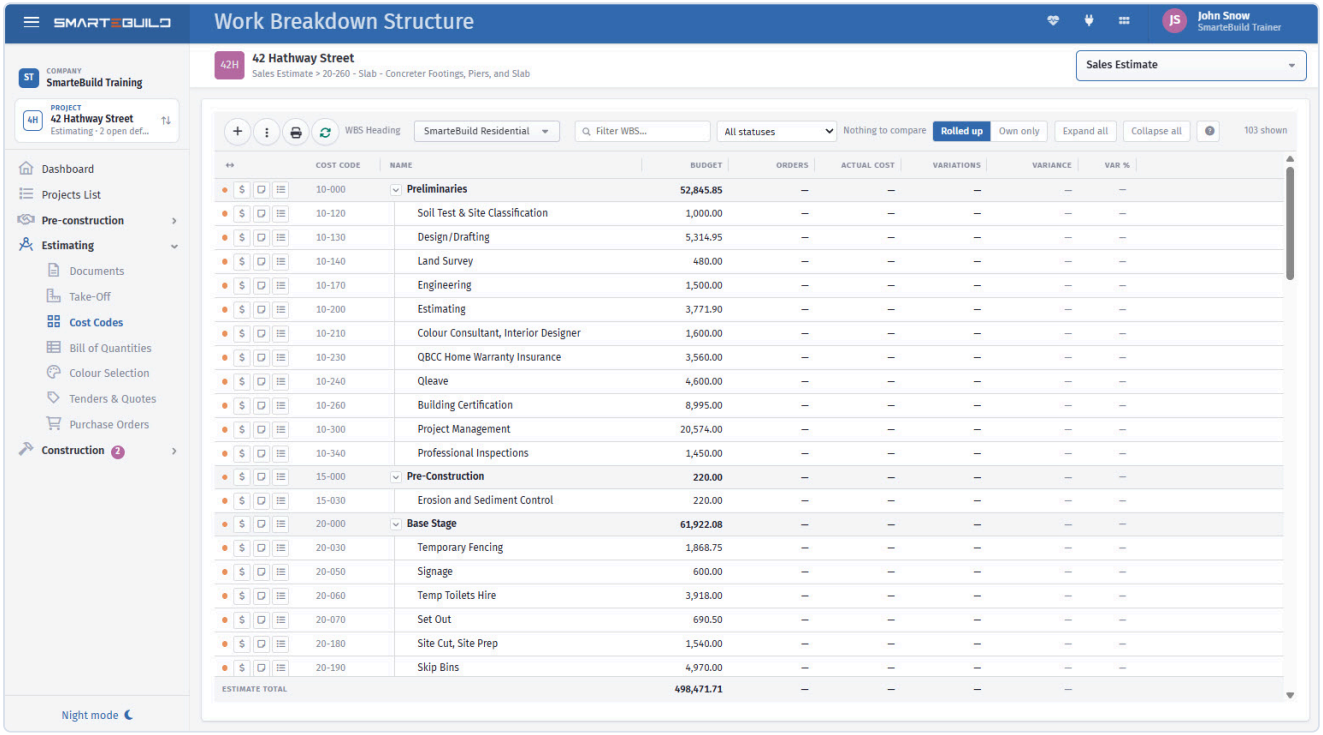
Cost codes

17.1 What cost codes are for

The trade breakdown you cost against, why it is the first thing to set up properly, and how it relates to the Bill of Quantities.

Cost codes are the structure you cost against — your trade breakdown. `Preliminaries`, `Concrete`, `Framing`, `Roofing`, `Brickwork`, `Carpentry`, `Plumbing`, `Electrical`, and so on.

Every item in the Bill of Quantities sits under one. That is what turns a long list of priced lines into something you can read a total off, compare between jobs, and issue orders from.



Every cost code with its budget, committed and actual side by side.

Why it matters more than it looks

The structure decides what questions you can answer later.

If concrete supply and concrete placing sit under one cost code, you can never separate them without going through the bill line by line. If they are separate, you get both numbers for free, on every job, forever.

The same goes for everything downstream:

- **Purchase orders** are grouped by cost code, so the structure decides how naturally an order maps onto one subcontractor's scope.
- **Cost reports** report by cost code.
- **Progress claims** and **expenses** are coded to them.

- **Comparing jobs** only works if the jobs share a structure.

That last point is the one people wish they had known earlier. Two jobs with different cost code structures cannot be compared without manual work, so a structure you keep changing costs you your own history.

> **Set it up once and reuse it** — Most builders use the same breakdown on nearly every job. Build it properly once, save it as a template, and start every estimate from it. See Reusing a structure.

Trades that do not apply

You do not have to delete a cost code that this job has no work in. Set its status to **Not Required** in the BOQ and it contributes zero to the totals, while staying in the structure.

That is what makes one standard structure usable on every job, from a full new build to a bathroom renovation. See Cost code status.

How deep to go

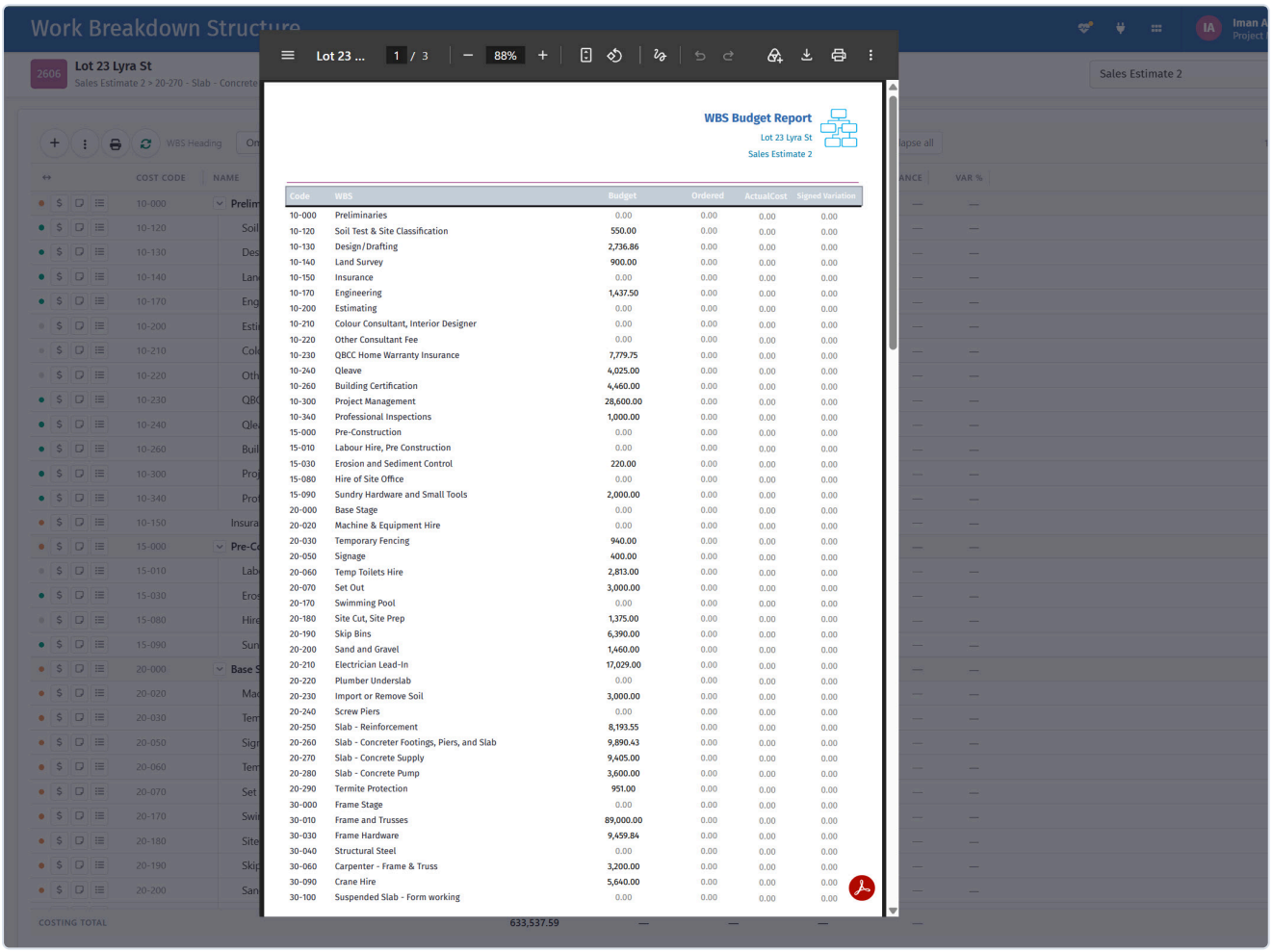
Cost codes are a tree — a cost code can have a parent. Depth is a trade-off:

Too shallow	About right	As deep as it goes
`Trades`	`Concrete` → `Slab`, `Driveway`	`Concrete` → `Slab` → `N32 supply`
One total, no detail	Orders map to real scopes	The limit, and more structure than most jobs fill

Two levels covers most residential building. Three is common on commercial work — and three is also the ceiling: SmarteBuild refuses a fourth, in cost code and price list structures alike.

The test is whether you would ever want that line as a separate number on a report or a separate purchase order — if not, it is detail that belongs in the item description rather than in the structure.

Cost codes and WBS



Code	WBS	Budget	Ordered	ActualCost	Signed Variation
10-000	Preliminaries	0.00	0.00	0.00	0.00
10-120	Soil Test & Site Classification	550.00	0.00	0.00	0.00
10-130	Design/Drafting	2,736.86	0.00	0.00	0.00
10-140	Land Survey	900.00	0.00	0.00	0.00
10-150	Insurance	0.00	0.00	0.00	0.00
10-170	Engineering	1,437.50	0.00	0.00	0.00
10-200	Estimating	0.00	0.00	0.00	0.00
10-210	Colour Consultant, Interior Designer	0.00	0.00	0.00	0.00
10-220	Other Consultant Fee	0.00	0.00	0.00	0.00
10-230	QBCC Home Warranty Insurance	7,779.75	0.00	0.00	0.00
10-240	Qleave	4,025.00	0.00	0.00	0.00
10-260	Building Certification	4,460.00	0.00	0.00	0.00
10-300	Project Management	28,600.00	0.00	0.00	0.00
10-340	Professional Inspections	1,000.00	0.00	0.00	0.00
15-000	Pre-Construction	0.00	0.00	0.00	0.00
15-010	Labour Hire, Pre Construction	0.00	0.00	0.00	0.00
15-030	Erosion and Sediment Control	220.00	0.00	0.00	0.00
15-080	Hire of Site Office	0.00	0.00	0.00	0.00
15-090	Sundry Hardware and Small Tools	2,000.00	0.00	0.00	0.00
20-000	Base Stage	0.00	0.00	0.00	0.00
20-020	Machine & Equipment Hire	0.00	0.00	0.00	0.00
20-030	Temporary Fencing	940.00	0.00	0.00	0.00
20-050	Signage	400.00	0.00	0.00	0.00
20-060	Temp Toilets Hire	2,813.00	0.00	0.00	0.00
20-070	Set Out	3,000.00	0.00	0.00	0.00
20-170	Swimming Pool	0.00	0.00	0.00	0.00
20-180	Site Cut, Site Prep	1,375.00	0.00	0.00	0.00
20-190	Skip Bins	6,390.00	0.00	0.00	0.00
20-200	Sand and Gravel	1,460.00	0.00	0.00	0.00
20-210	Electrician Lead-In	17,029.00	0.00	0.00	0.00
20-220	Plumber Underslab	0.00	0.00	0.00	0.00
20-230	Import or Remove Soil	3,000.00	0.00	0.00	0.00
20-240	Screw Piers	0.00	0.00	0.00	0.00
20-250	Slab - Reinforcement	8,193.55	0.00	0.00	0.00
20-260	Slab - Concreter Footings, Piers, and Slab	9,890.43	0.00	0.00	0.00
20-270	Slab - Concrete Supply	9,405.00	0.00	0.00	0.00
20-280	Slab - Concrete Pump	3,600.00	0.00	0.00	0.00
20-290	Termite Protection	951.00	0.00	0.00	0.00
30-000	Frame Stage	0.00	0.00	0.00	0.00
30-010	Frame and Trusses	89,000.00	0.00	0.00	0.00
30-030	Frame Hardware	9,459.84	0.00	0.00	0.00
30-040	Structural Steel	0.00	0.00	0.00	0.00
30-060	Carpenter - Frame & Truss	3,200.00	0.00	0.00	0.00
30-090	Crane Hire	5,640.00	0.00	0.00	0.00
30-100	Suspended Slab - Form working	0.00	0.00	0.00	0.00

The same figures as a report you can hand to somebody.

You will see both terms. They refer to the same tree:

- The module is called **Cost Codes** in the menu.
- The structure itself is a **Work Breakdown Structure (WBS)**, and a project can make more than one available to its estimates.

See Work Breakdown Structures for when you would want more than one.

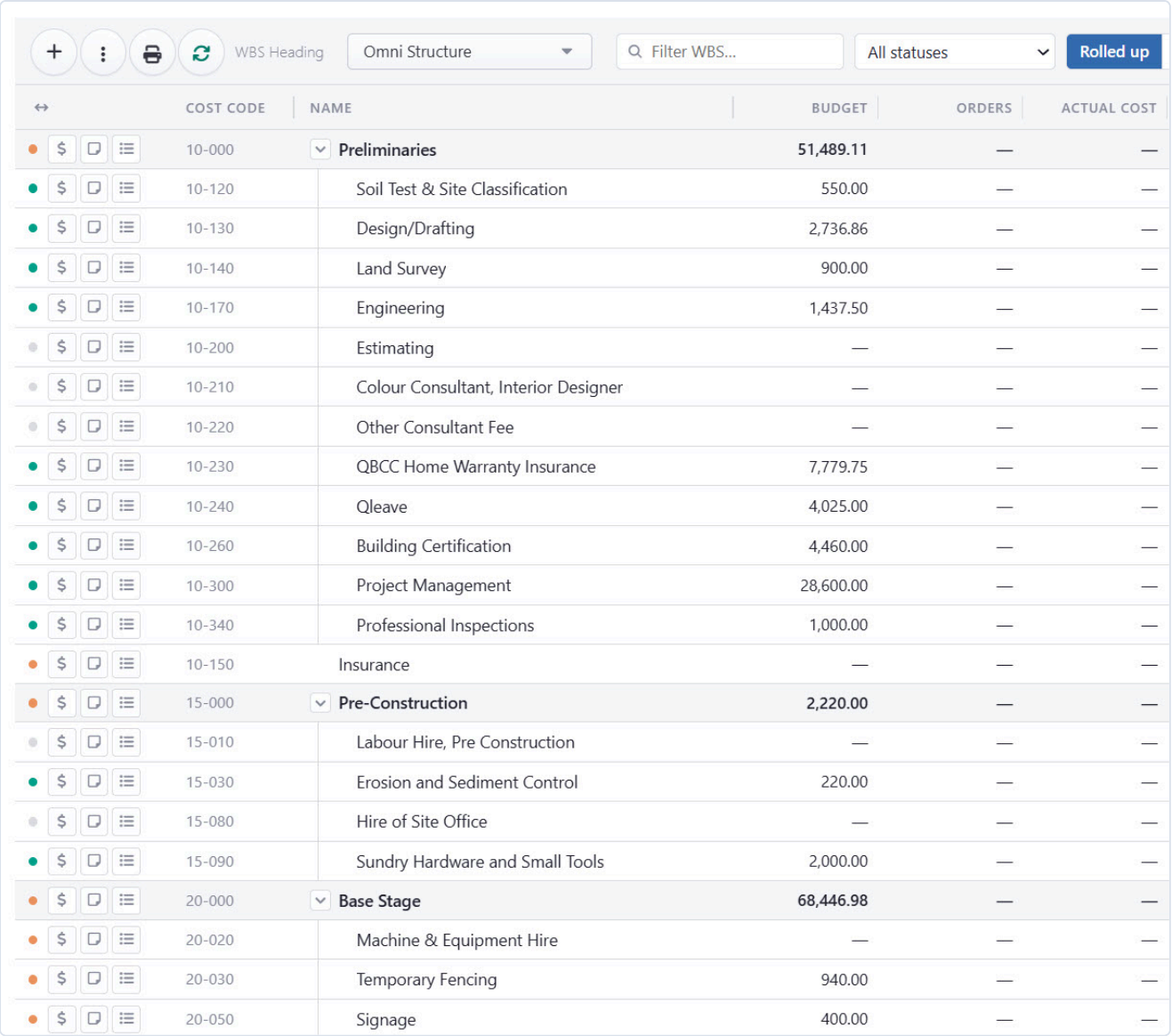
In this section

- Building your structure
- Work Breakdown Structures
- Reusing a structure

17.2 Building your structure

Adding cost codes, coding them, ordering them, and a worked example of a residential trade breakdown.

Open **Cost Codes** with an estimate selected, and use **Add New** to build the tree.



COST CODE	NAME	BUDGET	ORDERS	ACTUAL COST
10-000	**Preliminaries**	**51,489.11**	—	—
10-120	Soil Test & Site Classification	550.00	—	—
10-130	Design/Drafting	2,736.86	—	—
10-140	Land Survey	900.00	—	—
10-170	Engineering	1,437.50	—	—
10-200	Estimating	—	—	—
10-210	Colour Consultant, Interior Designer	—	—	—
10-220	Other Consultant Fee	—	—	—
10-230	QBCC Home Warranty Insurance	7,779.75	—	—
10-240	Qleave	4,025.00	—	—
10-260	Building Certification	4,460.00	—	—
10-300	Project Management	28,600.00	—	—
10-340	Professional Inspections	1,000.00	—	—
10-150	Insurance	—	—	—
15-000	**Pre-Construction**	**2,220.00**	—	—
15-010	Labour Hire, Pre Construction	—	—	—
15-030	Erosion and Sediment Control	220.00	—	—
15-080	Hire of Site Office	—	—	—
15-090	Sundry Hardware and Small Tools	2,000.00	—	—
20-000	**Base Stage**	**68,446.98**	—	—
20-020	Machine & Equipment Hire	—	—	—
20-030	Temporary Fencing	940.00	—	—
20-050	Signage	400.00	—	—

Drag a cost code onto another to move it underneath.

The fields

Field	What it does
Code	Your cost code. Sorts the list and appears on reports and orders.
Name	What the cost code is called.
Parent	Which cost code this sits under. Blank makes it top level.
Sorting Index	Position among its siblings, when you do not want code order.
Note	Anything you want to record about scope or inclusions.

Filter Structure... and **Filter WBS...** narrow a long tree while you work, and **Keep this box open** lets you add several in a row without the dialog closing each time — worth ticking when you are setting up a structure from scratch.

Moving things around

Drag a cost code onto another one to move it underneath it. It takes anything below it with it, and goes to the end of its new branch.

- While you drag, the cost code under the pointer lights up if it can take it, or turns pink with the reason if it can't — too deep, or inside itself — so you know before you let go.
- A strip appears at the top of the tree: drop there to move it to the **top level**.
- Hold it over a closed branch for a moment and the branch opens, so you can reach a place deep in the tree without letting go.

Changing **Parent** on the cost code itself does the same thing, and is easier when the two are far apart in a long tree. The **Parent** box is searchable — type part of a name or code — and greys out the places the cost code can't go, with the reason beside each.

> **Three levels, and no deeper** — A cost code can have children, and those children can have children — but no further. If a move would make a fourth level, SmarteBuild refuses it and tells you why. Dragging, editing the **Parent**, and importing from Excel all apply the same rule, in both cost code and price list structures.
>
> Three levels is nearly always enough. Where you want a fourth, an extra digit in the code usually reads better anyway: `310 Slab` , `311 Slab – excavation` .

Finding your way around a long tree

- **Find by name or code** filters as you type and highlights the matches. Whatever a match sits under is shown greyed, so you can see where it lives. **Enter** jumps to the first match.
- The tree remembers which branches you opened and closed — through saves, drags, refreshes, and closing the window. Only the branch of whatever you just saved or moved opens, so you can see the result. The expand-all and collapse-all buttons beside the search box reset it.
- The keyboard works too: the arrow keys move around (right opens a branch, left closes it or goes up a level), **Enter** edits, **Delete** deletes, **Insert** adds a cost code beside the selected one and **Shift+Insert** adds one inside it.

Coding

Codes do most of the organising. A numeric scheme with room to grow is the usual approach:

```
100  Preliminaries
200  Site works
300  Concrete
310    Slab
320    Driveway and paths
400  Framing
500  Roofing
600  External cladding
700  Windows and doors
800  Services
810    Plumbing
820    Electrical
```

```
830    HVAC
900  Internal linings
1000 Fixing and joinery
1100 Wet areas
1200 Painting
1300 Floor coverings
1400 External works
1500 Final clean and handover
```

Leaving gaps is the whole point. Coding trades 100 apart means you can add `330 Retaining walls` in three years without renumbering anything, and the order still comes out right.

> **Match your accounting codes if you can** — If your accounting package already has a chart of accounts for job costs, use the same codes here. Coding expenses becomes mechanical, and your two systems agree without anyone reconciling them.

Letting SmarteBuild number them

Settings..., on the ⋮ menu beside the toolbar, controls the code and index SmarteBuild suggests when you add a cost code:

Setting	What it does
Sorting index increments	The gap it leaves between one cost code and the next. `10` gives you 10, 20, 30 — room to slot something in later without renumbering.
Link index and code	Fills the Code box with the sorting index, instead of leaving it blank for you to type — and keeps it matching if you change the index or pick a different parent.
Digits in a generated code	Pads that code, so `10` becomes `010` at three digits. Only used with **Link index and code**.

These are saved against your login, so they carry across every structure you open. Whatever it suggests is only a starting point — overtype either box before saving.

Ordering

Cost codes sort by code by default. **Sorting Index** overrides that when you want a different order among siblings — useful if your codes came from an accounting system whose numbering does not run in build sequence.

Ordering the tree in **build sequence** rather than alphabetically is worth doing. An estimate that reads in the order the job happens is far easier to check for things you have missed, because a gap shows up as a stage that is not there.

Worked example: the Hendricks extension

A rear extension does not need the full structure. Trimmed to what the job actually has:

Code	Name	Parent
100	Preliminaries	—
200	Site works	—
300	Concrete	—
310	Slab	Concrete
400	Framing	—
500	Roofing	—
600	External cladding	—
700	Windows and doors	—
810	Plumbing	Services
820	Electrical	Services
900	Internal linings	—
1000	Fixing and joinery	—
1200	Painting	—
1500	Final clean	—

Starting from your standard template and deleting what does not apply is faster than building this from nothing, and it keeps the codes consistent with your other jobs.

Linking a cost code to a price list

Link to a price list cost code ties one of your cost codes to a cost code in a price list. It is what decides where a price list item lands when you bring it into an estimate: items filed under the linked price list code arrive under this cost code.

Pick the price list, then the code in it — the picker is the same searchable tree as the **Parent** box, and it opens on the code this one is already linked to, so you can see the current link before you change it. **Remove the link** breaks it again.

This is the quiet answer to *"why did that item land there?"* An item that arrives in the wrong cost code usually means the link points somewhere unexpected, not that the item is filed wrongly in the price list.

> **Linking is per cost code, not per structure** — It is set on the code itself, so a structure copied from a template brings its links with it. If you built a structure by hand and imports keep landing in the wrong place, check the links before re-filing anything in the price list.

Group Items

Group Items collects the items under a cost code for bulk handling — useful when reorganising a bill that has grown untidily. See Bulk operations.

Changing the structure later

You can add, rename and re-parent cost codes at any time, and the items under them follow.

The one thing to be careful about is **deleting** a cost code that is in use. Before it deletes anything, SmarteBuild lists everything that points at it and what will happen to each:

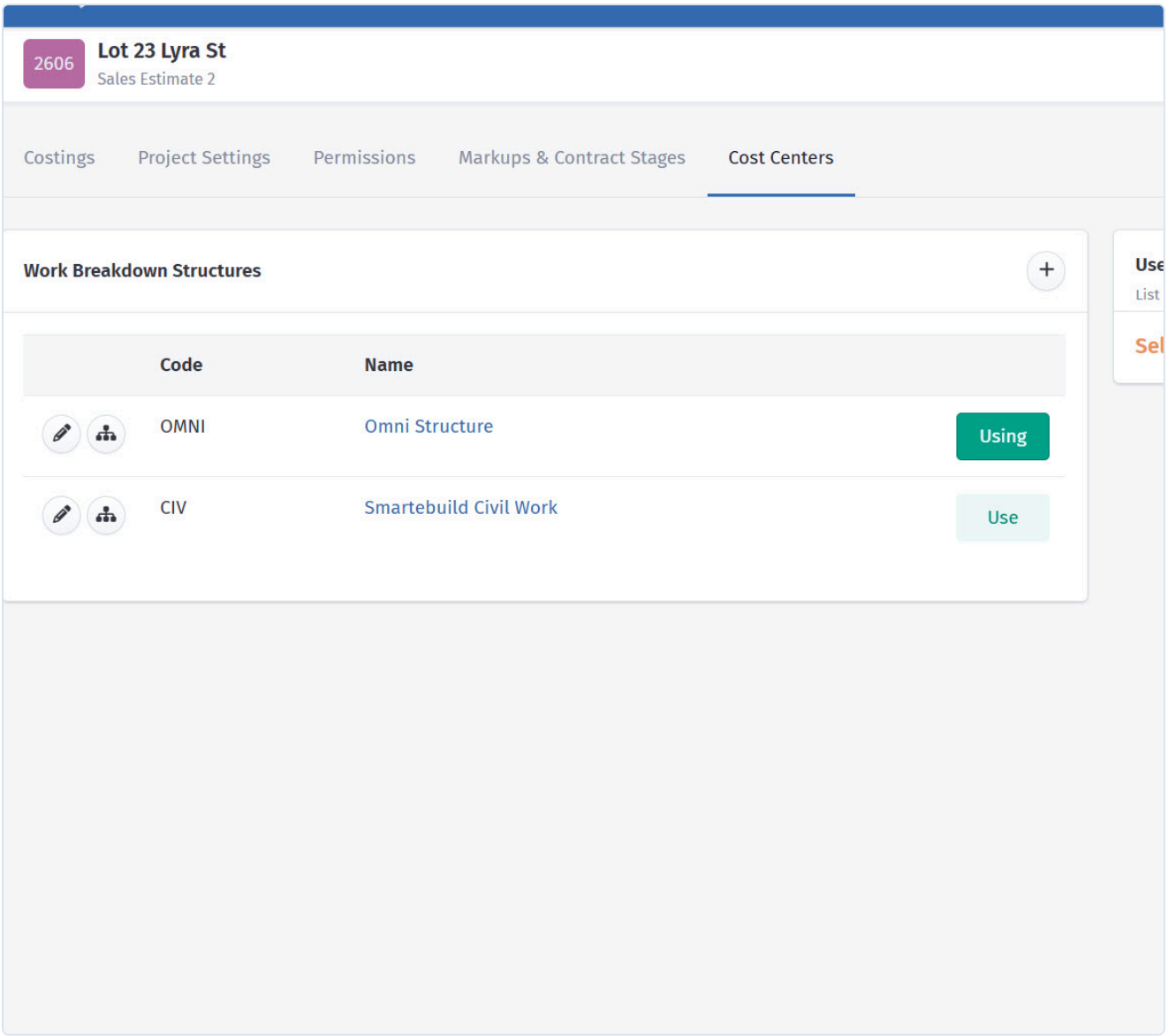
- cost codes underneath move up to the top level — they are not deleted
- estimate items under it lose their cost code. The dialog says how many jobs they're on and how much they're worth. They stay on those jobs, listed in the BOQ under **Not in a cost code** until filed again
- **invoice lines against it are deleted** — shown in pink so you do not miss it
- a cost code used by a tender, a WBS note or a to-do can't be deleted until those are cleared, and the dialog says which

Better: pick a cost code under **Move them to another cost code first?** in the same dialog. The items move there and the old cost code is deleted in one step, so they're never left without one. If you do leave them, **Not in a cost code** in the BOQ finds them. The delete happens all at once: if anything goes wrong part way, nothing is changed.

17.3 Work Breakdown Structures

When to keep more than one structure, how a project chooses which is available, and setting the default for new estimates.

A **Work Breakdown Structure** is a named cost code tree. Most builders need one. Some need two or three, and this is how you keep them apart.



The work breakdown structure rolls the job up level by level.

When one is not enough

You do	You might want
New builds and renovations	A structure for each — renovations carry demolition and make-good that a new build has no line for
Residential and commercial	Separate structures; commercial usually needs more depth
Work for a builder who mandates their codes	Their structure alongside your own
Volume and custom homes	A tight volume structure, a fuller custom one

If none of those apply, one structure is the right answer and multiple structures will only cost you consistency.

Making a structure available to a project

On the project, the **Work Breakdown Structures** tab controls which structures its estimates can use, and which one new estimates get by default.

Default WBS for new Estimates is the setting worth getting right. Set it on the project — or on the template you copy projects from — and every new estimate starts with the correct structure already in place, rather than empty.

> **Tip** — If your team keeps building estimates on the wrong structure, the fix is nearly always this default rather than more training.

Choosing the structure for an estimate

An estimate picks its structure when it is created. Changing it afterwards is possible but disruptive — the items are coded to cost codes in the old structure, so they have to be re-pointed.

Get it right at creation. If you realise an estimate is on the wrong structure and it is still early, it is usually quicker to create a new estimate on the right one and duplicate the work across.

Codes should mean the same thing everywhere

If you run more than one structure, keep a code meaning the same thing in each. `300` should be concrete in your new-build structure and in your renovation structure.

Where they must differ, make the difference obvious — a renovation structure might add `250 Demolition` and `260 Make good`, which simply do not exist in the new-build tree. Adding codes is fine; reusing the same code for different trades is what breaks cross-job reporting.

Reading the grid

The WBS page is not only where structures are named. For the estimate you have open it is a live cost grid — one row per cost code, rolled up through the tree.

Column	What it shows
Cost code and **Name**	Which line of the structure the row is
Budget	What the estimate allows
Orders	What purchase orders have committed
Actual cost	What has actually been invoiced
Variations	What approved variations have added or taken off
Variance and **Var %**	Budget against actual, in dollars and as a percentage

Drag the edge of a column to resize it. **Reset every column to its default width** puts them all back when the grid gets away from you.

Cost breakdown on a row opens the money on that cost code: the quotes, orders, invoices, timesheets and variations behind the figures on the row.

Comparing with another estimate

Compare with… puts another estimate's budget beside this one — up to **four** at a time.

Only estimates built on the **same structure** are offered. Cost codes line up row for row only when both were built the same way, so comparing across structures would put unrelated trades on the same line. The estimate you are looking at is left out of the list, and you can search it by job name or estimate name.

This is the fastest sanity check on a new estimate: stand the job you have just priced next to two finished ones on the same structure, and the cost code where you are 30% light is obvious in a way it never is in a single column of figures.

> **Compare against jobs that finished, not jobs you won** — A tender you won tells you what you charged. A job you finished tells you what it cost. The second is the one worth comparing against.

Filtering

Filter WBS… and **Filter Structure…** narrow a long tree while you are working in it. **Look Up** finds a cost code by code or name when you know what you want but not where it sits.

All statuses narrows the grid to one cost code status — the quickest way to see what is still sitting at *Waiting for Quotation* a week before you have to submit.

Where a WBS is used

- The **Bill of Quantities** groups items by it, and can show **Only Selected WBS**
- **Purchase orders** are grouped by it
- **Expenses** are coded to it
- Cost reports summarise by it
- **Hide Empty Nodes** in the BOQ suppresses cost codes with nothing in them, which makes a full standard structure usable on a small job

17.4 Reusing a structure

Templates and importing, so you build your cost code structure once rather than on every job.

Building a cost code structure from scratch on every job is the single most avoidable waste of time in SmarteBuild. There are two ways not to.

Templates

Mark an estimate as a **template** (**Make this estimate a template**, on the estimate) and it becomes available in the **Copy items from a template** dropdown whenever a new estimate is created.

A template carries across the cost code structure *and* the items in it. That is usually what you want — your standard preliminaries, the site costs you allow on every job, the trades you always use — so a new estimate starts as a partly-built estimate rather than an empty grid.

Setting one up

1. Create a project to hold your templates. Many builders call it `_Templates`, so it sorts to the top.

2. Create an estimate on it named for what it is: `Standard – New Build`, `Standard – Renovation`.
3. Build the cost code structure you want.
4. Add the items you carry on every job of that type. Leave quantities at zero — the rates and descriptions are what you are reusing, not the quantities.
5. Tick **Make this estimate a template**.

Using one

When you create an estimate, pick the template under **Copy items from a template**. The new estimate arrives with the structure and items already in place. Delete what this job does not have and price what it does.

> **Delete down, do not build up** — Starting from a full template and deleting the trades that do not apply is faster and much safer than starting empty and adding. You forget to add things. You rarely forget to delete something that is sitting in front of you with no quantity against it.

Import

Import on the Cost Codes screen brings in a structure directly, without the items. Use it when you want the tree but not the pricing — for instance when a client or head contractor mandates their own cost coding for a job.

Importing from a spreadsheet

Import cost codes from Excel, on the ⋮ menu, takes a cost code list straight off a spreadsheet. The dialog walks you through it:

1. **Start from a spreadsheet.** Download the blank template — it has the four columns the import expects: Index, Code, Name and Parent Code. Or use **Export to Excel** on the same menu, which writes exactly those columns, change what you need, and bring it back.
2. **Fill it in.** One row per cost code, from row 2 down. Leave **Parent Code** blank for a top-level cost code; for a child, put its parent's **Code** there.
3. **Upload it.** Excel workbooks only — `.xlsx`, `.xlsm` or `.xls`. If your list is a CSV, open it in Excel and save it as `.xlsx` first.
4. **Say which column is which.** If you used the template or an export, the dropdowns fill themselves in; if your own spreadsheet uses different headings, point each one at the right column. Only **Name** is required: with no Parent Code everything comes in at the top level, and with no Index each branch is numbered 10, 20, 30… in the order the rows are in the file.
5. **Check, then import.** The check runs by itself as soon as the columns are mapped, so any problem is on screen before the import button is.

Importing **replaces** the whole structure — every existing cost code in it is deleted first, and you are asked to confirm. SmarteBuild checks the file before deleting anything, and will not start if it finds:

- the same **Code** on more than one row
- a **Parent Code** that is not a Code somewhere in the file
- a row that is its own parent, or a loop of rows pointing at each other
- more than three levels of hierarchy

- a code or index longer than 50 characters

You get told which rows are at fault and nothing is touched, so you can fix the spreadsheet and upload it again.

> **Note** — A structure whose cost codes are already in use — by estimate items, orders, invoices, tenders and so on — can't be replaced this way, because replacing it would cut them loose. Add the new cost codes alongside instead. The import itself happens all at once: if anything goes wrong part way, the structure is left exactly as it was.

Replacing from a template

Replace from a template..., on the same menu, swaps every cost code in the structure for a copy of another one that has been marked as a template — tick **Make this structure a template** under the pencil beside a structure's name to offer it here. SmarteBuild's own templates are labelled.

The same rules as importing apply: it asks you to confirm, it is refused while any cost code here is in use, and it happens all at once.

Updating from the master structure

Where your cost codes were copied from one of SmarteBuild's master structures, they keep a link back to it — a small link icon beside each one. **Update from master structure...**, on the ⋮ menu, brings the copy back into line:

- cost codes added to the master since you copied it are added here, under the right parents
- names, codes and sorting indexes are refreshed from the master
- your cost codes are arranged into the master's hierarchy, rather than left in a flat list

It shows you what it is about to do first — how many will be added, overwritten and moved, and **Show the changes** lists every one — and you can back out. It only ever touches the structure you have open.

There are three options:

Option	What it does
Sync everything	Adds what the master has that you do not, and updates what you already have.
Update only what's here	Refreshes the names, codes and sorting indexes of your existing cost codes and imports nothing new. Use it when the master has grown in directions you do not want.
Organise what's here	Brings in the master's **group headings only** — no new cost codes — and files your existing ones underneath them.

When to use "Organise what's here"

Use it when your cost codes are sitting in one long flat list and you want them grouped, but you do not want the full master list back.

That happens when the structure was imported flat, when you trimmed it down to the cost codes you actually use and deleted the headings along with them, or when SmarteBuild reorganised the master into

new stages after you took your copy. In all three cases *Update only what's here* leaves everything flat — it has nowhere to put anything, so it does not move a thing.

This option imports only the headings your own cost codes belong under, then moves them in. A master group with nothing of yours beneath it is not brought in, so you do not end up with empty stages, and no new cost code is added.

Finding the ones that are yours

Show only cost codes not linked to master, on the same menu, hides everything that came from the master structure and leaves the ones you added yourself. Those are exactly the cost codes an update will never touch, so it is a quick way to see what is genuinely yours before running one — or to check that something you added has not been quietly duplicated by an import. Anything shown only to hold a child in place is greyed and marked *linked to master*. **Show all**, in the bar across the top, switches the tree back.

> **It overwrites your codes** — If you renumbered your cost codes to your own scheme after copying them — which is a perfectly sensible thing to do — this puts the master's codes back. Read the counts on the confirmation before saying yes, and if the "overwrite" number is large, that is what it is telling you.

Cost codes you added yourself are left alone, and nothing is ever deleted. The option only appears on a structure that was copied from a master one.

Keeping templates current

A template drifts out of date the same way anything else does. Two habits keep it honest:

- When you find yourself adding the same item to jobs by hand three times, add it to the template.
- When a trade you always allowed for stops being relevant, take it out.

Review the templates once a year, or after any change in how you build — a new standard inclusion, a change of subcontractor, a code change that adds a requirement.

What a template does not carry

The same limits as duplicating an estimate:

- **take-off measurements** do not copy
- orders, claims, variations and expenses do not copy

A template is a starting point for an estimate, not a copy of a job. See Estimates and templates.

Structures across projects

Setting **Default WBS for new Estimates** on the project means every estimate on that job starts on the right structure. Doing the same on the project you copy new projects from means every *job* starts right too.

Between the project default and an estimate template, a new job should take you seconds to set up, not an afternoon.

17.5 The money on one cost code

Drilling into a cost code to see what was estimated, quoted, ordered, invoiced, worked and varied, with the documents behind every figure.

The Cost Codes grid gives you a row per cost code — budget, orders, actual cost, variations. Clicking that row's **Cost breakdown** button (or **Budget** on the Bill of Quantities, or **All the money** in an Earned Value row's drawer) opens the window behind those figures: what makes each of them up, and the quotes, orders, invoices, timesheets and variations they came from.

What the six figures mean

Figure	What it counts
Estimate	The BOQ items filed under this cost code — quantity × rate. Items switched off are left out.
Quoted	Supplier quote lines coded here.
Ordered	Purchase order lines coded here — what you have committed to spend.
Invoiced	Supplier invoices and expenses coded here.
Labour	Approved timesheet hours × cost rate.
Variations	Approved variation lines that change this cost code. A removal is a negative figure.

Click any of the six to see the list behind it. **Invoiced** and **Labour** together are the **Actual cost** column on the Cost Codes grid, and each figure here is worked out the same way that grid works it out — so the drill-down always adds up to the row you opened it from.

Amounts are ex GST, the same as the BOQ.

Where you stand

Under the figures is the line that matters on site:

- **Allowed** — the estimate plus approved variations.
- **Spent** — invoices and labour.
- **Still to come on orders** — what is on the orders you have placed but has not been invoiced yet.
- **Left**, or **Over by** when the first three have passed the allowance.

Orders and invoices are deliberately not added together: an invoice normally arrives *against* an order, so adding them would count the same money twice.

This cost code, not the whole document

A purchase order usually covers several cost codes. The **This cost code** column is the part of that order coded here; **Whole document** is what the order is worth in total, and it only appears when the two differ.

> **This is what changed** — The window this replaced put each document's **whole** value in the money column and added those up. On one job in the field, a cost code with $74,092 of orders against it read $207,761. If you have ever looked at this window and thought a trade was wildly over, that is why — the Cost Codes grid was right and this window was not.

Getting to the document

Each row has an arrow that opens the quote, order, invoice or variation in a new tab, and a folder icon when a file is attached to it. Sort by any column heading, or use the search box to find a supplier or a number in a long list.

Seeing the lines inside a document

The chevron at the start of a quote, order, invoice or variation row opens the lines of it that are coded here — each with its own cost code, quantity and rate, and a total that matches the figure on the row. Underneath, it says how much of that document sits on other cost codes.

That is the quickest way to settle an argument about a trade's spend: not "the order was $58,400" but "three lines of it, $37,940, are brickwork".

Rolling up the cost codes underneath

On a cost code that has others under it, **Include cost codes underneath** adds the whole branch into every figure and every list — the same sum you would get by adding up those rows on the Cost Codes page. The lists then carry a **Cost code** column so you can see which code each item or timesheet entry is on.

Taking it to a meeting

Excel builds a workbook: the figures and where you stand on the first sheet, then a sheet per list — estimate, quotes, orders, invoices, labour, variations. It follows whatever you have on screen, including the roll-up.

When invoiced runs past ordered

If more has been invoiced against a cost code than was ever ordered, the window says so under the figures. It usually means one of three things: an invoice coded here without a purchase order behind it, an order that was never updated when the price moved, or an invoice coded to the wrong cost code. All three are worth a look before the job closes.

Things worth knowing

- A cost code marked **Not required** counts as a zero estimate on the Cost Codes grid. Its items are still listed here, and the window says so at the top.
- An invoice line with no BOQ item is coded straight to a cost code — it still counts.
- Variations that have not been approved yet are listed, marked, and **not** counted towards the cost code. The footer says how much is waiting.
- Costs are only visible to people with the **See costs and rates** permission.

CHAPTER 18

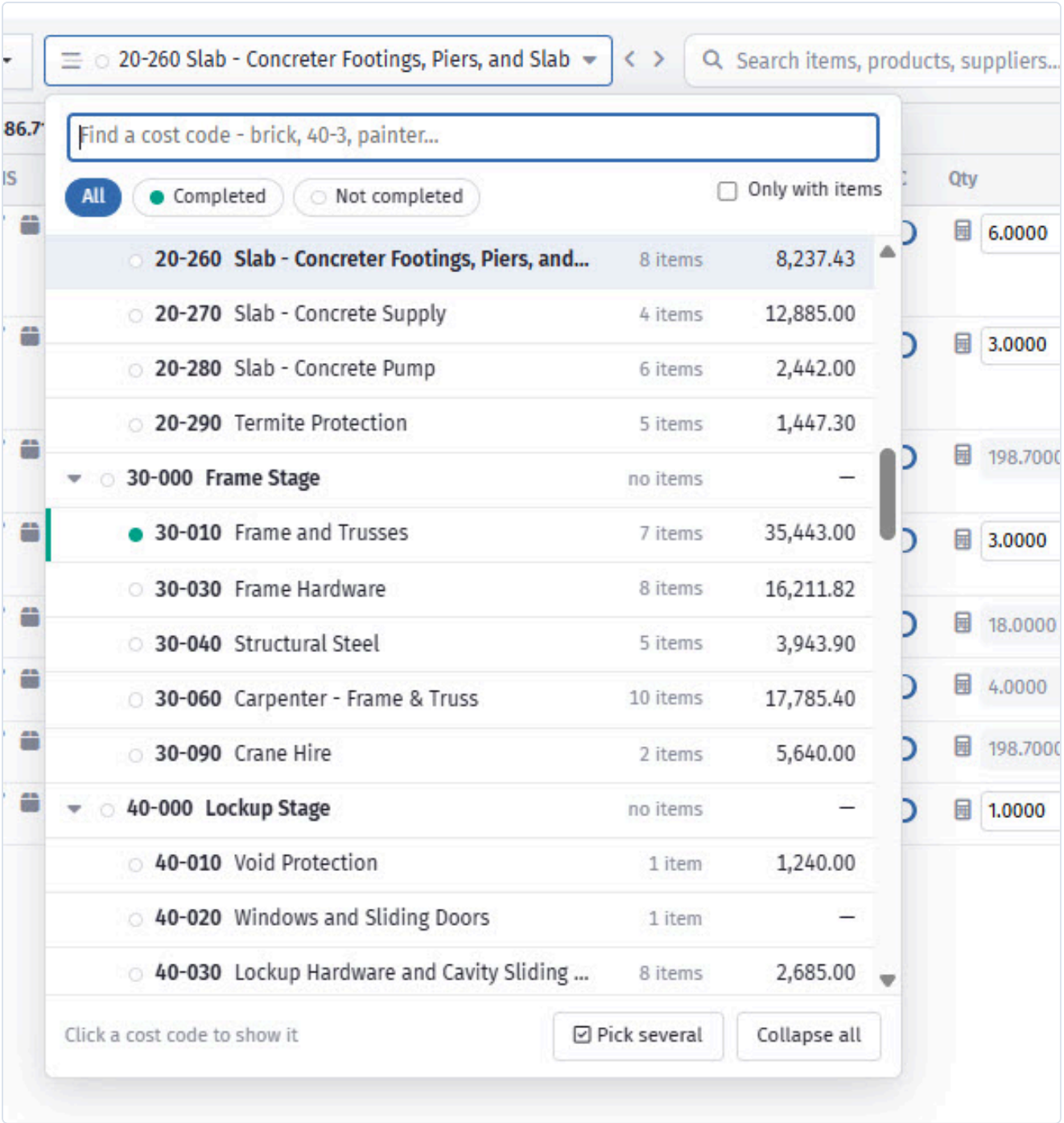
The Bill of Quantities

18.1 The Bill of Quantities explained

What the BOQ is, how a line is built up, and why it is the spine that orders, claims and variations all read from.

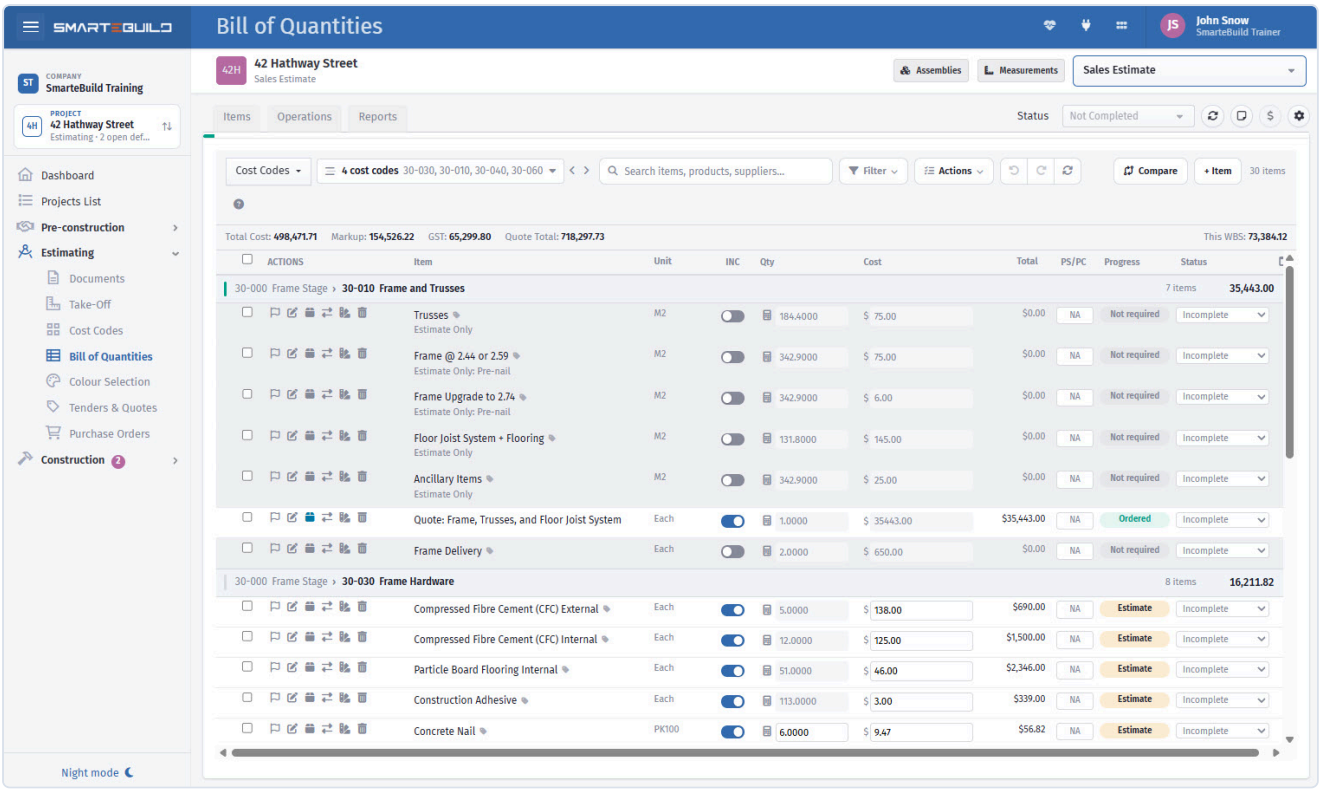
The Bill of Quantities is the priced estimate. It is also the spine of everything that happens after the estimate — purchase orders, progress claims, variations and expenses all read from it.

Understanding the BOQ properly is worth the time even if somebody else builds it, because almost every downstream question turns out to be a question about an item.



The bill, with its items under the cost codes they belong to.

What a line is made of



Each line carries its own quantity, rate, supplier and cost code.

Every item answers three questions: what is it, how much of it, and what does it cost?

Part	Field	Notes
What	**Item Name**, **Description**, **Item Size**	What you are buying or doing
Where	**Cost code**	Which trade it belongs to
How much	**Quantity**, **Unit**, **Wastage (%)**	See Getting a quantity
What it costs	**Price**, **Markup**, **GST**	See Prices, markups and GST

Quantity × price gives the item cost. Sum the items in a cost code and you have the trade total. Sum the trades and you have the job.

Choosing what to look at

The box at the top left of the bill, beside **Cost Codes**, decides which cost codes the bill is showing. Click it and a panel opens with every cost code on the job, already scrolled to the one you are on, which shows in bold:

- **Each row tells you what is in it** — how many items, and what they add up to — so you can see where the money is before you open anything.
- **The coloured dot and bar** are the cost code's status: teal for **Completed**, grey for **Not Required**, orange for **Waiting for Quotation**, an empty circle for **Not Completed**.

- **Type to find one.** It matches the code and the name, so `brick`, `40-3` and `painter` all work. Press `Enter` to show the first match straight away.
- **The status chips** narrow the list to one status, and **Only with items** hides the cost codes with nothing in them yet. It starts off, so every cost code is there to pick, including an empty one you are about to add items to.
- **Where your cost codes sit inside one another**, the panel shows them that way, with the group above its members. Click the arrow to fold a group away.

Click a cost code's name to show just that one — the quick way, same as before.

Looking at several at once

Until you ask for more, the list is one click, one cost code. Press **Pick several** at the foot of the list and tick boxes appear; clicking a name now ticks it instead of opening it. **Tick** the cost codes you want and press **Show in BOQ**, and the bill shows all of them together, each in its own section with its own sub-total. Tick a group and everything in it is ticked. Press **Picking several** again to go back to one at a time.

This is how you price related trades side by side — brick supply, lintels and the bricklayer on one screen — instead of stepping between them. When the bill is already showing several, the list opens with its tick boxes on.

Each section is headed with its place in your cost codes, code and name at each level — *40 External › 40-270 Brick Supply* — so you always know which part of the job a line belongs to. **This WBS** in the totals bar becomes the budget of all of them together.

A few things work on **one cost code at a time**, and are greyed out while several are ticked:

- **Order**, **Invoice**, **Quote**, **Variation** and **Tender**, on the ribbon and in the actions menu — each of them is raised against one cost code.
- **+ Item** and **Paste**, because a new line needs one place to go.
- The cost code **status** dropdown and its **note**, as they are with **All items**.

Duplicate selected still works: each copy lands in its own original's cost code.

To go back to one, click a name, or press **Clear** and tick just the one.

The three menus

The BOQ toolbar has three dropdowns, and knowing which does what saves a lot of hunting:

Items — everything that creates or restructures items: Add New Item, Import Assembly, Import from Price Lists, Organise Items, Edit Cost Codes, Change Sorting, Show Orphan Items.

Operations — everything that acts on what you have selected: Copy, Cut, Paste, Select All, Delete selected, Duplicate selected, Switch on/off selected.

Reports — the outputs. See Reports.

Included and excluded items

Items can be **switched on or off** with the switch in the **Inc** column — blue and to the right is on, grey and to the left is off. A switched-off item stays in the bill, keeping its quantity and rate, but does not count toward the total.

This is how you price an option without deleting anything. Carry the tiled roof and the colorbond roof as separate items, switch on whichever the client wants, and the total follows.

Only Included Items filters the view to what is currently counting.

> **Switch off rather than delete** — A deleted item takes its rate, its supplier and its history with it. A switched-off item costs nothing and is one click from coming back. When a client is still deciding, switch off.

Cost code status

Where switching an item off works one line at a time, **status** works on a whole cost code. Each one carries a status you set from the dropdown at the top of the cost code, in this order:

Status	What it means	How it looks
Not Required	This trade is not part of the job	Plain
Not Completed	Still being priced	Pink
Waiting for Quotation	Priced out, waiting on a subcontractor's number	Yellow
Completed	Priced and checked	Teal

Not Required contributes zero to the job total. Every item under it stops counting — not deleted, not hidden, just excluded from the money.

That is what makes a full standard structure workable on a small job. Import your fifteen-trade template onto a bathroom renovation, mark the eleven trades that do not apply as Not Required, and the total is correct without deleting anything you might want back.

The other three are progress markers for whoever is building the bill. **Waiting for Quotation** is the useful one on a live tender: it separates "I have not priced this yet" from "I have done my part and I am waiting on somebody else", which are very different problems when the deadline is close.

Working through a bill by keyboard

Moving between cost codes, and the two statuses you set most:

Key	Does
`F9`	Previous cost code
`F10`	Next cost code
`F7`	Mark this cost code **Not Required**
`F8`	Mark it **Completed**

Together those are a fast way to work down a bill: `F10` to the next trade, price it, `F8` to mark it done, `F10` again. Trades that do not apply take one `F7` and drop out of the total as you pass them.

With **several cost codes ticked**:

- `F10` moves to the cost code **after the last one ticked**, and `F9` to the one **before the first** — on its own. Stepping walks the job, so it always lands you on one definite cost code.
- `F7` and `F8` set the status of **every ticked cost code** at once, after asking you to confirm. Handy for marking a whole group Completed in one go.

Not Completed and **Waiting for Quotation** have no shortcut deliberately — they are the states you land in by working, not ones you jump to. Set them from the dropdown.

Inside the grid itself, the **Quantity** and **Cost** boxes behave like a spreadsheet:

Key	Does
`Enter`	Saves, and moves **down** the same column
`Shift` + `Enter`	Saves, and moves **up** the same column
`Tab`	Saves, and moves **across** to the next field

So you can key quantities straight down a trade without reaching for the mouse: type, `Enter`, type, `Enter`. The value in the box you land on is selected, so typing replaces it. Every one of those moves saves the box you just left — there is no separate save.

Taking an edit back

Because those edits save as you leave each box, there is no "cancel". Instead:

Key	Does
`Ctrl` + `Z`	Undoes the last Quantity or Cost edit
`Ctrl` + `Shift` + `Z`	Redoes it

The same two are on the toolbar as ↺ and ↻, and they grey out when there is nothing to undo or redo. Each one tells you which item it put back.

A few things worth knowing:

- It covers the **Quantity and Cost boxes** — the ones you type into. The one-click toggles are not included; click them again instead.
- It remembers the **last 25 edits**, and only in the cost code you are in. Switching cost code starts a fresh history.
- While you are still typing in a box, `Ctrl` + `Z` is your browser's own undo for the characters in that box. Ours takes over once you have left it — which is also the point at which there is a saved edit to take back.

> **Delete is not undoable** — Deleting an item removes it along with its products, its specification links and its take-off link. That cannot be rebuilt from an undo history, which is why deleting asks you to confirm and Ctrl+Z will not bring it back. If you are unsure, use **Switch off selected** instead — the item stays, at no cost.
>
> An item that is on an **order**, an **invoice**, a **tender**, a **quote** or a **colour selection** cannot be deleted at all, because its lines on those would go with it. The delete button on its row leaves it where it is and tells you what it is on — for example *This item is on order "Frame supply", so it can't be deleted*. **Delete selected** skips it and tells you how many it skipped.

PS and PC items

PS/PC flags an item as a **Provisional Sum** or **Prime Cost** allowance — money carried for work not yet fully specified.

Flagging them matters because they are the items most likely to become variations. When the client picks the tapware and it costs more than the PC allowance, the difference is a variation, and having flagged the item makes that conversation straightforward.

Provision carries the allowance amount.

Items over budget

Once a job is running, money starts coming back the other way: purchase orders committed against an item, and invoices actually recorded against it. The BOQ compares both against what the estimate allowed for that item — its **Total**.

When either has passed it, the item is marked:

- A **pink bar down the left edge of the row**, in the same place on every row so a long sheet can be scanned for it.
- The **Total** goes pink with a warning triangle. Total is always on screen, which is the point — the Ordered and Actual Cost columns are optional, and an overrun you have to switch a column on to see is one you will not find.
- **Ordered** and **Actual Cost**, when those columns are shown, go pink individually — so you can see which of the two blew, not just that something did.

Hover any of them for the detail: which figure, how much over, and the percentage.

Ordered and Actual are judged separately, never added together. An invoice normally settles an order that is already counted in the Ordered figure, so adding them would double-count and flag items that are perfectly fine.

> **An item with no budget at all** — An item switched **off** still has a Total of zero, so an order or an invoice against one is marked too — with different wording, because nothing in the quote is covering it. That is usually worth a look: it is money on the job the estimate is not carrying.

Nothing here changes a number or blocks anything. It is a prompt to go and look.

Finding them

Filter on the toolbar (the funnel icon), then tick **Over budget**, narrows the list to just these items. The Filter button turns pink while it is on, so a short list is never mistaken for an empty cost code.

The filters under **Filter** all work across the whole scope in view, not just the rows already on screen, and they combine: **Over budget** plus **Included** gives you the overruns that are still in the quote, leaving out the switched-off ones. The number on the button says how many filters are on; **Show everything** in the panel clears them.

Labour, material and subcontractors: cost types

Every item has a **cost type**: Allowance, Fee, Labour, Material, Subcontractor, Freight, or any your company has added. It is how you answer "how much of this job is labour?"

- **Filter** on the toolbar (the funnel icon):
  - **Cost types** - tick the types to show only those.
  - **Group by cost type** puts a heading over each type, with its item count and subtotal. Click a heading to fold it away. With several cost codes showing, the groups sit inside each cost code. Dragging items into a new order is off while grouped.
  - **Totals by cost type** turns on a line under the totals bar (off to start with).
- **The totals line**, for example *Labour 48,200.00 · Material 112,900.00 · Subcontractor 86,000.00*, adds up the items on screen: the cost codes you are looking at, after any filter. Switched-off items count as nothing, as in the grid. Click a type to show only that type; click it again to show everything.
- **The Cost type column** lets you change an item's type right in the grid. It is off by default: turn it on from **Choose columns** (the columns icon at the right-hand end of the heading row).
- **Many at once:** tick the items, then **Actions** → **Set cost type**.

> **Not set, and old "Allowance" items** — An item nobody has given a type shows as **Not set**. Until September 2026 such items were quietly saved as **Allowance**. So on older estimates, a big Allowance total usually means "never sorted", not real allowances. Group by cost type, look through the Allowance group, and use **Set cost type** to sort it out.
>
> Items taken from a price list bring the price list item's cost type with them. Sorting the types out once in the price list fixes every estimate you build afterwards.

GST-free items

Filter on the toolbar, then tick **GST-free**, shows only the items whose GST box says **GST-free**. These are usually council fees, certifier fees and some authority charges. It works like the other filters, over every cost code in view.

To change many at once, tick them and use **Actions** → **Set GST**. See Prices, markups and GST for what the setting affects.

What reads from the BOQ

Module	Reads
Purchase Orders	Items, to raise orders against
Expenses	Items and cost codes, to code invoices to
Progress Claims	Item values, to claim against
Variations	Adds items to the bill
Take-Off	Feeds quantities into items via fields

This is why an item's cost code matters so much: it decides how the item is grouped everywhere else.

Locking

Lock Ordered or Billed Items stops items being changed once an order or an invoice exists against them.

Turn it on. Editing the quantity on an item you have already ordered against silently breaks the relationship between what you committed and what you allowed, and the discrepancy usually surfaces months later.

In this section

- Adding items
- Getting a quantity
- Formula fields
- Prices, markups and GST
- Suppliers and products
- Organising items
- Bulk operations
- Specification
- Reports
- BOQ settings

18.2 Adding items

The four ways to get an item into the bill - by hand, from a price list, from an assembly, and by duplicating - and every field on an item.

There are four ways to get an item into the bill. Which you use depends on whether the work is standard for you.

Method	Use it when
Add New Item	A one-off you have no rate for
Import from Price Lists	Work you do regularly and have rates for
Import Assembly	A group of items that always go together
Duplicate selected	Another item on this job is nearly the same

If you find yourself using **Add New Item** repeatedly for the same kind of work, that work belongs in your price list.

The Item window

Open an item with its pencil in the BOQ, or add one with **Add New** on the ribbon. The window has two tabs.

Item has everything about the item:

Field	What it is
Name	Short name, shown in the grid
Description	The full wording, used on orders and reports
Cost code	New items only: the cost code it goes under. It starts on the one the BOQ is showing
Quantity	Typed here, or worked out another way. See Getting a quantity
Unit	m, m², m³, each, hour, item, sum
Price	Cost per unit. Tick **I typed it including GST** and the project's GST comes off
In the estimate	Switched off, the item stays in the bill but counts as nothing
Product	Which of the item's products sets its price. **None** uses the item's own price
Row no.	Where it sits in the bill
Item code	The item's code, usually from the price list
Item size	How much one covers (2.88 m² a sheet), for the "by size" roundings
GST	Whether GST applies
Markup	The project's markup, or its own percentage
Provision	Provisional sum or prime cost allowance
Cost type	Labour, material, subcontractor and so on
Progress	Incomplete, Completed, Outstanding Quote, RFI
Purchase order note	Printed on the order sent to the supplier
Internal note	Never leaves your office

When the quantity comes from somewhere other than typing (a calc sheet, another item, a formula, a take-off field), it says where from, and **Change...** opens Calculate quantity.

Cost codes shows the job's cost code lists and where the item is filed in each. Pick one to move it; type to find it. Changes save straight away. Taking an item out of its only cost code asks first: it would count in the job's total but in no cost code's (see Items not in a cost code).

Duplicate makes a copy under the same cost codes and opens it. **Ctrl+S** saves.

A closed job, or an item under a **Completed** cost code, opens read-only with the reason at the top. Prices and markup only show to people allowed to see them.

The two note fields

They go to different places, and mixing them up is how internal margin commentary ends up on a subcontractor's order:

- **Internal Note** — never printed on anything that leaves your office. This is where "check this rate, looks light" belongs.

- **Purchase Order Note** — prints on the order. This is where "deliver to rear lane, no crane access" belongs.

In the bill, the Item column shows them under the item name so you can tell them apart at a glance: the description in grey, the internal note in pink, and the purchase order note highlighted in yellow.

Wastage

Wastage (%) is added on top of the measured quantity. Measure 100 m² of tiles with 10% wastage and the item carries 110 m².

Put wastage here rather than in the measurement. The measured quantity stays an honest record of what is on the drawing, the wastage stays visible and adjustable, and neither is buried in the other.

> **Tip** — Wastage on the item also means you can change your allowance across a trade without re-measuring anything — useful when a tiler tells you their cutting waste is nearer 15% than 10%.

Importing from a price list

Import from Price Lists opens a window over the bill with your price lists in it.

- On the left, pick the **price list**, then a **cost code**. Type in the box above the tree to find one; **All items** shows the whole price list.
- On the right, switch between **Items** and **Products** (the supplier products on those items), and search by code, name, description, SKU or supplier.
- Click **Add**, or double-click a row, to put it in the bill.

The window opens on the cost code you are working in, when that cost code came from a price list. Each row tells you what you need before you pick it:

You see	It means
In BOQ (or **In BOQ ×2**)	It is already in this estimate — once, or that many times
Yours under the price	Your company's own price, set in Price lists. It takes the place of the standard rate
A boxes icon and a number	The item has that many supplier products to choose from
A green tick by the cost code	It belongs to the cost code you have selected
Superseded	The supplier has replaced that product

Where it goes works exactly like + Item: it goes to the cost code it belongs to, and if you have a cost code selected and the item belongs somewhere else, you are asked which you want.

After you add an item that has supplier products, the product picker opens so you can choose one straight away. To add several things in a row instead, tick **Keep this window open to add more**: each one is confirmed at the bottom of the window, and the product picker is skipped.

On a job that is **Under Construction** or **Finished**, anything you add — from this window or with **+ Item** — comes in switched off, so it doesn't change the contract total. Switch it on if it should count.

Changing the price list as you go

If you have access to Price lists, the pencil on a row opens that item in Price lists in a new tab, and **New item** opens the new-item form there, filed under the cost code you are browsing. When you come back to the BOQ tab the window refreshes itself, so your change is already there.

Rows that came from SmarteBuild's own price list have no pencil. They are shared with every company, so they are not yours to change — bring one into the bill and edit it there, or duplicate it in Price lists to get a copy of your own.

Swapping an item

The swap button on a row of the bill opens the same window, headed **Swap item**. Pick the replacement and click **Swap**: the item takes its name, description, unit and price, and keeps its quantity and cost code. Swap from the **Products** view to take a particular supplier product as well.

The link to the price list

Imported items keep a **Link to Pricelist**, which is what lets you refresh rates later — see Suppliers and products.

An item you typed by hand has no link, so it will never pick up a price update. If the work is going to recur, add it to the price list and import it instead.

The price in the list is the price you get. It is your company's price — including any price you have set yourself in Price lists, which takes the place of the standard rate — and that same figure is what lands in the bill. That holds for all three ways of using the list:

- **Importing an item** — the item comes in at the price shown.
- **Importing a product** (switch the list to **Products**) — the item comes in with that product attached and selected, at the product's price shown.
- **Swapping an item** — the replacement takes the price shown, and in the Products view, the product you picked.

Adding with + Item

Type into **+ Item** and matching price list items appear as you type. Each one shows the cost code it belongs to — for example *Concrete Supply* — so you can see where it will go before you pick it.

If you have a cost code selected and the item belongs somewhere else, you are asked which you want:

- **Add to the selected cost code** — it goes into the cost code you are working in.
- **Add to where it belongs** — it goes into its own cost code. If that is under a different heading, the item is added under that heading instead, and won't show in the cost code you are looking at; the message afterwards tells you where it went.

There is no question when the item already belongs to the selected cost code, or when no cost code is selected — then it simply goes where it belongs.

Only price list items filed under a cost code appear here, the same as in **Import from Price Lists**. An item with no cost code has nowhere to go; give it one in Price lists first.

Importing an assembly

An **assembly** is a group of items that always go together. A slab assembly might carry excavation, formwork, mesh, concrete, pump hire, and the labour to place and finish it.

Import Assembly brings the whole group in at once, so you add a slab rather than seven separate lines. Assemblies are also what take-off fields group under, so an assembly and its measurements line up naturally.

Worked example: adding the slab

For the Hendricks extension, under cost code `310 Slab`:

1. **Import Assembly** → `Concrete slab – waffle`. Six items arrive.
2. Set the quantity on the concrete item from the take-off field `Slab concrete`.
3. Set the mesh and membrane quantities from `Slab area`.
4. Add 5% wastage to the mesh.
5. The pump hire is a fixed call-out — leave it at `1 item` with a typed rate.

One assembly, two take-off fields, and the slab is priced and will follow any change to the drawing.

Duplicating

Duplicate selected copies items complete with rates and descriptions. Faster than re-importing when a job has several near-identical items — three bathrooms with the same fitout, say.

Duplicate, then change what differs. Watch the descriptions: a duplicated item that still says *Ensuite* while sitting in the main bathroom is the kind of thing that reaches a subcontractor's order.

The quantity comes with it however it was worked out — including a formula, which keeps reading the same fields and items the original read. See Bulk operations.

18.3 Getting a quantity

The five ways to put a quantity on an item - manual, a take-off field, another item, the calc sheet and a formula - and how to choose between them.

Open **Calculate Quantity** on any item and you choose one of five sources for its quantity. Choosing the right one is most of the skill in building a bill that survives a drawing revision.

Method	Quantity comes from	Updates itself
Manual	A number you type	No
Take-off field	A take-off measurement	Yes
Another item	Another item in this estimate, with or without its wastage	Yes
Calc Sheet	Dimensions you enter, shown as a calculation	Recalculates from the rows
Formula	Other quantities and variables	Yes

> **This page is the short version** — For each method in full — every button in the window, the wastage and rounding that are applied afterwards, and the eight **Rounding** options including the three that convert a measurement into units to order — see Fields, items, formulas and calc sheets.

Manual entry

Type the number.

Right for genuine one-offs — a single call-out fee, a lump sum, something you were told over the phone. Wrong for anything measured off a drawing, because nothing will ever update it.

Field

The quantity comes from a **take-off field**, so it follows every change to the measurement.

Pick the field from the list, or use **Measure on the plan** to open Take-Off with this item in mind, measure, and come back with the item already pointed at the field.

This is the method to reach for whenever the quantity is measurable off a drawing. See Take-off fields and the BOQ.

Item

The quantity comes from **another item in this estimate**. You choose whether to take it **with its wastage** (its final quantity, as the BOQ shows it) or **without its wastage** (its quantity before its own wastage is added) — both numbers are shown so you can see the difference. Take it without when this item carries its own allowance, so waste is not counted twice.

Use it when one item's quantity genuinely *is* another's: mesh chairs from the mesh, bedding sand from the slab area, a second coat from the first. Faster than a formula when the relationship is one-to-one, and it keeps following the source if the source is re-measured.

> **Careful** — If the source item is **switched off**, this item's quantity silently becomes zero. Worth knowing if you price options by switching items on and off.

Calc Sheet

The calc sheet is the dimension book: a list of dimensions that multiply out, with the working visible.

Use it when the quantity comes from dimensions you have rather than from a drawing you can measure — a schedule of room sizes, a set of figured dimensions on a sketch, something a client has emailed you.

Its value is that the working is **visible**. Six weeks later, "why is that 86 m²?" has an answer on the screen instead of in your head.

Worked example

Skirting to four rooms, from a room schedule:

Description	Length	Width	Times	Result
Living perimeter	5.4	4.2	2	19.20
Bed 1 perimeter	3.6	3.2	2	13.60
Bed 2 perimeter	3.4	3.0	2	12.80
Hall	6.8	—	2	13.60
Less door openings	0.87	—	−7	−6.09
				53.11 m

The door deduction is the point. It is on the screen, it is explicit, and anyone checking the bill can see it was allowed for.

Formula

The quantity is derived from other quantities. See Formula fields.

Use it when one quantity genuinely follows another — mesh follows slab area, skirting follows wall length, paint follows wall area.

Choosing between them

Work down this list and take the first that applies:

1. **Can it be measured off a drawing?** Use a **field**. It will follow every revision.
2. **Is it the same as another item's quantity?** Use **item**.
3. **Does it derive from other quantities?** Use a **formula**.
4. **Do you have dimensions but no drawing to measure?** Use the **calc sheet**, so the working is recorded.
5. **Otherwise**, type it — and flag it.

> **Typed quantities are the ones that go stale** — When a drawing is re-issued, fields and formulas move on their own. Typed quantities do not, and nothing flags them. If you must type a quantity for something measurable, put a **Flag** on the item so you can find it again.

What the method gives, and the final quantity

The bar along the bottom of the window shows both, step by step: what the method gives, then wastage, then size and rounding, ending in the quantity the item carries.

Measure 100 m² into a field, set 10% wastage, and the bar reads 100 → 110. The measurement stays honest and the allowance stays visible.

18.4 Fields, items, formulas and calc sheets

The Calculate Quantity modal in depth - measuring into a take-off field, borrowing another item's quantity,

writing a formula, and building a calc sheet, plus wastage and the six rounding options.

Open **Calculate Quantity** on any BOQ item and you choose one of five sources for its quantity. This article covers all of them in detail, and the two things that happen to the number afterwards.

If you only want to know which method to reach for, read Getting a quantity instead — it is the short version.

The window

The window has three parts:

- **Get the quantity from**, down the left: the five methods. Each one shows what it would give right now, and the one the item uses carries an **In use** tag.
- The middle: the method you are looking at.
- **Adjust**, under the methods: wastage, item size and rounding.

Along the bottom, the **quantity bar** works the answer out step by step before you save: what the method gives, then wastage, then the size, then the rounding, ending in the quantity the BOQ will show. Save only when that last number looks right. **Ctrl+S** (Cmd+S on a Mac) saves too.

If you are allowed to see costs, the bar ends with the **Total**: the quantity times the item's price, as the BOQ's Total column works it out, and how much more or less that is than now. A switched-off item says so, because it adds nothing to the job.

When other items take their quantity from this one, a line above the bar names them: *"3 other items change with this quantity: Concrete supply, Mesh, Vapour barrier."* **Show all** lists every one, including items further down a chain (an item that follows an item that follows this one) and formulas that use it. Change a slab from 180 to 150 m² and you can see which lines move with it before you save. After you save, those lines update in the BOQ straight away.

On a narrow screen the methods become a row you scroll sideways, and the adjustments move under the middle part.

The five methods

Button	Quantity comes from	Follows changes
Manual	A number you type	No
Field	A take-off measurement	Yes
Item	Another item in this estimate	Yes
Calc Sheet	Dimensions entered as rows	Recalculates from the rows
Formula	An expression over named variables	Yes

An item uses **one** method at a time. Switching method does not erase the others — a calc sheet you built stays there if you switch to Formula and back — but only the one showing when you press **Save quantity** produces the quantity. The line at the bottom says so when you are about to switch ("Saving switches this item from Manual to Calc Sheet").

Field

Calculate quantity using a field. The quantity comes from a take-off field, so it follows every measurement you make on the drawing.

Pick a field from the list: fields are grouped under their assembly, each shows its current total, and the search box narrows the list as you type. The item's quantity becomes that field's total.

Measure on the plan

The button at the bottom of this tab opens Take-Off with this item in mind.

Measure into an existing field or create a new one, press **Done**, and the item comes back already pointed at what you measured. It saves doing the two halves — measure it, then price it — as separate errands.

What to know

- A field's total is read **live**. Change a measurement and the item is already right; there is no recalculation to run.
- One field can feed **many items**. Measure the slab once and point the concrete, the mesh, the membrane and the sand bed at it.
- A field that gets its quantity from a **formula** is read-only in Take-Off. The formula wins; clear it if you want to measure the field off a drawing instead.
- If the field's unit does not match the item's (m^2 of slab feeding m^3 of concrete), a yellow warning says so and shows what the item would be priced at. See When a quantity looks wrong.

See Take-off fields and the BOQ for how fields, units, heights and depths work.

Item

Calculate quantity using the quantity of another item in this estimate. This is the one people miss, and it removes a lot of duplicated measuring.

Pick the item from one list: every item in this estimate, grouped by cost code, each with its quantity. Type in the search box to find it by name or cost code.

The item itself is greyed out, and so is any item that already follows this one — linking the two would make each wait for the other forever.

With or without its wastage

Once you have picked the item, choose how much of it to take:

Choice	Takes	Example: slab 180 m^2, 10% wastage
With its wastage	Its final quantity, as the BOQ shows it	198 m^2
Without its wastage	Its own quantity before its wastage is added (its size and rounding still apply)	180 m^2

Both numbers are shown on the two choices, so you can see the difference before you pick.

Take it **without** its wastage when this item carries its own allowance. Concrete that follows the slab area, with the concreter's 5% on the concrete item, should not also pick up the slab's 10%: that would count waste twice.

Take it **with** its wastage when this item really follows what will be bought or laid — the fixings for the sheets you will actually order, say.

Duplicating the item, or the whole estimate, keeps the choice.

When to use it

Whenever one item's quantity genuinely *is* another's:

This item	Takes its quantity from
Mesh chairs	The mesh
Bedding sand	The slab area
Paint, second coat	Paint, first coat
Skirting adhesive	Skirting
Door furniture	Internal doors

It is faster than a formula when the relationship is one-to-one, and it survives being re-measured because it reads the source item rather than a copy of it.

> **The source item must stay switched on** — If the item you are borrowing from is **switched off**, this item's quantity becomes **zero** — silently. Nothing warns you.
>
> That bites when you carry options: switch off the tiled roof in favour of colorbond, and anything that took its quantity from a tiled-roof item quietly drops to nothing. If you price options this way, check what depends on them before switching.

Chains

The source item can itself take its quantity from a field, a formula or another item, and it all resolves. Measure the slab once, let the concrete read the field, and let the pump read the concrete.

Keep chains short. Two links is easy to follow; five is a puzzle when a number looks wrong six weeks later.

Formula

Calculate quantity using the Formula. The quantity is an expression over named variables you define on the item.

The tab has three parts: the variables, the formula box, and its result.

Button	Does
Add variables	Opens a window listing the job's take-off fields and items. Press **Add as A**, **Add as B** and so on beside each one you need, then **Done**
Sum all	Writes `{A} + {B} + {C}…` using every variable
⋯ › Copy variables and formula / Paste	Moves the set to another item in the same job
⋯ › Remove all variables...	Clears them, after asking

Each variable gets a letter in the order you add it, and its row shows where it comes from and its current value. A variable that is another item also shows that item's description under its name, so two items with similar names are easy to tell apart (hover over it for the full text). The **Add variables** window and the **From another item** list show the description too, and their search boxes find words in it. Click a letter — or the **Insert** buttons under the box — to put it into the formula where the cursor is.

The **Result** box works the formula out as you type, the same way the save will, and says what is wrong when it cannot: a letter that is not in the list, a bracket out of place. That check is worth reading — a formula that produces 1,864 instead of 18.64 looks entirely plausible sitting in a total.

Writing one

Ordinary arithmetic over the letters: `+`, `–`, `×` (`*`), `÷` (`/`) and brackets.

Item	Variables	Formula	Reads as
Slab mesh	A = slab area	`{A} * 1.05`	Slab area plus 5% laps
Slab concrete	A = slab area, B = slab depth	`{A} * {B}`	Area × depth
Wall paint	A = wall length, B = wall height	`{A} * {B} * 2`	Both faces
Skirting	A = wall length, B = door openings	`{A} - {B}`	Wall run less the doors

Functions

The **Functions** buttons under the formula box insert one with the cursor inside its brackets. Select part of the formula first and the button puts that part inside the brackets instead: select `{A} * 1.1`, press **CEILING**, and you get `CEILING({A} * 1.1)`. Hover over a button to see what it does.

Function	Gives	Example
`CEILING(x)`	Up to the next whole number	`CEILING(4.2)` = 5
`FLOOR(x)`	Down to the whole number	`FLOOR(4.8)` = 4
`ROUND(x, places)`	To the nearest, to that many decimal places. A minus number of places rounds to tens, hundreds...	`ROUND(2.345, 2)` = 2.35
`MIN(a, b)`	The smaller of the two	`MIN(3, 5)` = 3
`MAX(a, b)`	The larger of the two	`MAX(3, 5)` = 5
`ABS(x)`	Without its minus sign	`ABS(-2)` = 2
`SQRT(x)`	Square root	`SQRT(16)` = 4
`POWER(x, n)`	x to the power n	`POWER(3, 2)` = 9

`CEIL` works as another name for `CEILING`. (`CEIL`, `MIN` and `MAX` used to make a formula fail and give a quantity of 0. They now work.)

> **Whole numbers divide as whole numbers** — `3/10` gives **0**, not 0.3: when both sides are whole numbers the division drops the remainder. Write `3.0/10` or `0.3`. The Result box shows exactly what will be saved, so this shows up before you save.

Removing a variable

The letters after it move up — remove **A** and **B** becomes **A** — and the formula is re-lettered to match, so it keeps pointing at the same things. Anywhere the removed one was used shows as `{?}` and the Result box says so, rather than quietly reading a different variable.

Copy and paste variables

Copy and paste are what make formulas practical across a bill. Set up the variables and formula on one item, then paste them onto the others that need the same inputs rather than rebuilding them each time. Paste brings the formula into the box; press **Save quantity** to keep it. Pasting works within the same job only, because the variables point at that job's fields and items.

See Formula fields for more worked examples.

Calc Sheet

Calculate quantity using the Calc Sheet. The dimension book: a grid of rows that multiply out and total.

Button	Does
Add line	New row, at the bottom
··· › **Copy this sheet** / **Paste**	Moves a whole sheet to another item — paste adds the copied lines below any already there
··· › **Delete all lines...**	Clears the sheet, after asking
⠿ handle at the start of a row	Drag it to move the row up or down
+ / −	Adds the row, or deducts it
Copy icon at the end of a row	A copy of the row, straight under it — handy for rooms that repeat
× at the end of a row	Deletes the row

It works like a spreadsheet: the Result updates as you type, **Enter** moves down a row (and adds one when you are on the last), **Alt+↑** / **Alt+↓** moves the row you are typing in, and any box takes a sum such as `=2.4+1.2`. Lines save as you go, the same as before — you do not lose them by closing the window.

How a row calculates

Each row is:

```
Times × Length × Width × Height × Factor × (1 + Wastage)
```

Then the rows are added together.

Any box left empty counts as 1 — Times included. That is the rule that makes one grid work for lengths, areas and volumes alike: fill in only the dimensions that apply and leave the rest blank. (An empty Times box used to save as 0 and quietly drop the whole line; it now counts as 1 like the others.)

You want	Fill in
A length	Length
An area	Length and Width
A volume	Length, Width and Height
A count	Times only

Deductions

A row switched to **−** is subtracted rather than added — its result goes negative, and the row is shaded so it stands out.

That is how you take out door openings, window reveals, a void in a slab. The deduction stays visible as its own line, which is the point: someone checking the bill can see the allowance was made.

Per-row wastage and rounding

Rows can also carry their own wastage and rounding, applied to that row before the rows are summed. The window does not show those two settings, but a row's **Result** already includes them, so the total is always

right.

Worked example

Skirting to four rooms, from a room schedule:

Description	Times	Length	Width	Deduct	Result
Living perimeter	2	9.60	—		19.20
Bed 1 perimeter	2	6.80	—		13.60
Bed 2 perimeter	2	6.40	—		12.80
Hall	2	6.80	—		13.60
Door openings	7	0.87	—	•	−6.09
					53.11 m

Width and Height are blank, so they count as 1 and the sheet returns a length.

The door deduction is the reason to use a calc sheet at all. It is on the screen, it is explicit, and anyone checking the bill can see it was allowed for.

Manual

Type the number into **Quantity**. A sum works too: start it with `=`, as in `=12.5*2.7`, and the answer shows underneath.

Right for genuine one-offs — a call-out fee, a lump sum, a figure you were given over the phone. Wrong for anything measurable, because nothing will ever update it.

> **Flag anything you type** — Typed quantities are the ones that go stale when a drawing is re-issued, and nothing marks them. If you have to type a number for something that really should be measured, put a **Flag** on the item so you can find it again before you submit.

What happens to the number afterwards

Whichever method produced the quantity, two things are applied on top, in this order.

1. Wastage

`Quantity × (1 + Wastage / 100)`

Set under **Adjust**, below the methods. Measure 100 m² with 10% wastage and the item carries 110 m². Leave the box blank for no wastage. (A blank box used to be saved as 1%.)

Keep wastage here rather than building it into the measurement. The measured figure stays an honest record of what is on the drawing, and the allowance stays visible and adjustable across a whole trade.

2. Output — rounding

The **Rounding** dropdown under **Adjust** decides how the result is presented. Eight options:

Output	What it does	Result for 18.64
Exact	Leaves it alone	18.64
Round Up	Up to the next whole number	19
Round Up to 1 Decimal	Up to the next tenth	18.7
Round Up to 2 Decimals	Up to the next hundredth	18.64
Round Down	Down to the whole number	18
Into Size	Up to the next whole multiple of the size	see below
By Size	Divides by the size	see below
By Size Rounded Up	Divides by the size, rounds up	see below

Wastage is applied before rounding, not after. So 100 m² with 10% wastage and Round Up gives 110, not 111.

The two decimal options round **up**, never to nearest: 18.641 becomes 18.65, not 18.64. A figure that is already at or under that many decimals is left alone, which is why 18.64 above is unchanged by **Round Up to 2 Decimals**. Use them for materials measured to a part-unit but ordered in sensible increments — concrete to the tenth of a cubic metre, for instance — where **Round Up** to a whole unit would overstate the order and **Exact** carries more decimals than anyone orders in.

The three "size" options

These convert a measured quantity into **how many you have to buy**, using the **Item size** under Adjust: **Product's** takes the selected product's size, **Type one** lets you enter it. The size box is only used by these three options, and is dimmed otherwise.

Say you have measured **47.5 m** of timber and it comes in **4.8 m** lengths:

Output	Maths	Gives	Means
By Size	47.5 ÷ 4.8	9.90	Lengths needed, unrounded
By Size Rounded Up	⌈47.5 ÷ 4.8⌉	10	**Lengths to order**
Into Size	⌈47.5 ÷ 4.8⌉ × 4.8	48.0	Metres you will actually buy

By Size Rounded Up is the one to use when you order in whole units — lengths, sheets, rolls, boxes. The item is priced per unit and the quantity is the number of units.

Into Size keeps the quantity in the measured unit but rounds it up to what you will actually receive. Use it when the item is priced per metre or per square metre but supplied in fixed sizes.

> **A size option needs a size** — Saving one of these three options with a size of zero is refused, and says why. If the product you picked has no size, switch to **Type one** and enter it.

Saving this screen updates dependent formulas

Every method on this screen produces a quantity, and so do wastage, size and rounding. Any of them can move a formula elsewhere in the estimate that reads this item.

So when you press **Save quantity**, the BOQ recalculates those formulas for you a moment later, the same as it does after an inline quantity edit. There is nothing extra to click. See Keeping formula results current.

If you save the **Formula** tab with a formula the system cannot read, it says so on the screen and stores the item's quantity as **zero**. Closing the screen does not make that go away: a **Formula needs attention** warning stays on the BOQ toolbar, and clicking it brings you straight back here to fix it.

Choosing a method

Work down and take the first that applies:

1. **Can it be measured off a drawing?** → **Field**. It follows every revision.
2. **Is it the same as another item's quantity?** → **Item**.
3. **Does it derive from other quantities?** → **Formula**.
4. **Do you have dimensions but no drawing to measure?** → **Calc Sheet**, so the working is recorded.
5. **Otherwise** → **Manual**, and flag it.

When a quantity looks wrong

It is zero and you did not expect it. If the method is **Item**, check the source item is switched on — a switched-off source gives zero with no warning.

A size option is doing nothing. The size is empty or zero, so it falls back to 1. Check whether the item is set to use the item size or the product size, and that the one it is using has a value.

The number is bigger than the measurement. Wastage is applied before rounding — check the wastage percentage before assuming the rounding is wrong.

It did not change when you measured. The item is probably not on the **Field** method, or is pointed at a different field. Reopen Calculate Quantity and check which method carries the **In use** tag.

It is higher (or lower) than the item it follows. Check whether it takes that item **with** or **without** its wastage.

A yellow "units don't match" warning. The field or item this one follows is measured in a different unit, and nothing converts it. The classic case: concrete in m^3 following a slab area in m^2 gives 180 m^3 instead of 18 — ten times the price, and it still looks plausible in a total. Use a **Formula** that applies the depth (such as `{A} × 0.1`), or, to count items such as sheets, a "by size" rounding with the size one item covers. The warning goes away once something converts the number.

A formula gives a plausible but wrong answer. Read the **Result** box and check it against a rough mental figure. A misplaced decimal survives every other check.

You cannot change anything. The window says why at the top: the job is closed, the cost code is Completed, or your permissions do not include editing the BOQ.

18.5 Measurements

Every take-off field on a job in one window - where each number comes from, which items use it, and how to type, move and tidy them.

A **measurement** (also called a take-off field) is a named quantity on the job: *Slab area*, *Wall length*, *Roof pitch area*. Items take their quantity from one, so changing the measurement changes every item on it.

The **Measurements** button at the top of the BOQ, next to **Assemblies**, opens a window listing every measurement on the job. (It used to be called **Take off fields**.)

The window

- **Down the left**: the job's assemblies. Each shows how many fields it has, how many are measured on a plan, and how many items are priced from it. **All fields** at the top lists every measurement on the job in one table.
- **On the right**: the fields of the assembly you picked — name, unit, quantity, where the number comes from, and which items use it.
- **Along the top**: totals for the job.

The search box finds assemblies and fields by name.

Where the number comes from

Every field says which of three places its number comes from, and that decides whether you can type it:

Tag	The number comes from	Change it
Measured	Measurements drawn on a plan in Take-Off (or fields linked into it)	In Take-Off. **Open in Take-Off** opens the plan and page it was last measured on, with that field picked
Formula	The assembly's take-off sheet — its questions, lines and formulas	On the take-off sheet (**Open take-off sheet**)
Typed	Whatever was typed here	Type over it here, then **Save**

Measured and formula quantities show a padlock. That stops a typed number being overwritten the next time someone measures or recalculates.

Typing and saving

Change a name, a unit or a typed quantity, then press **Save**. The button says how many changes are waiting, and a changed row is marked down its left edge. A quantity can be a sum: type `=2.4*3`.

Only the rows you changed are saved. If you try to close the window, open another one, or go to Take-Off with changes still unsaved, it asks whether to **Save and continue**, **Discard** them, or **Stay**.

Every item priced from a measurement updates as soon as it is saved, and any item formula that reads one recalculates a moment later.

Which items use a field

Used by shows how many items use the field. Click it to list them, with each item's cost code and quantity. An item appears here if its quantity *is* the field, or if its formula reads it.

Quantity source... beside an item opens its Calculate Item Quantity window, to point it at a different field or give it its own quantity. Closing that window brings you back here.

Adding, moving and deleting fields

- **Add field** (with an assembly picked) adds a typed field with its name ready to type over.
- ··· › **Move to** moves a field to another assembly on the same job. It keeps its number, its measurements and its items. A **formula** field can't move on its own, because its formula reads its own assembly's questions — duplicate the assembly instead.
- ··· › **Delete field...** asks first. It is refused, with the reason, while an item uses the field or while it has measurements drawn on a plan. Delete those in Take-Off first.

Assemblies

- **New** adds an empty assembly and lets you name it straight away.
- **From library** opens the Assemblies window, which adds a kit's fields **and** its items.
- **Open take-off sheet** opens the assembly's questions, lines and formulas. Closing it brings you back here.
- ··· › **Rename**, **Duplicate** (a copy with its fields, questions and lines; the items stay with the original) and **Delete assembly...**.

Deleting an assembly removes it with its fields, questions and lines in one step. It is refused while any of its fields prices an item, or has measurements drawn on a plan.

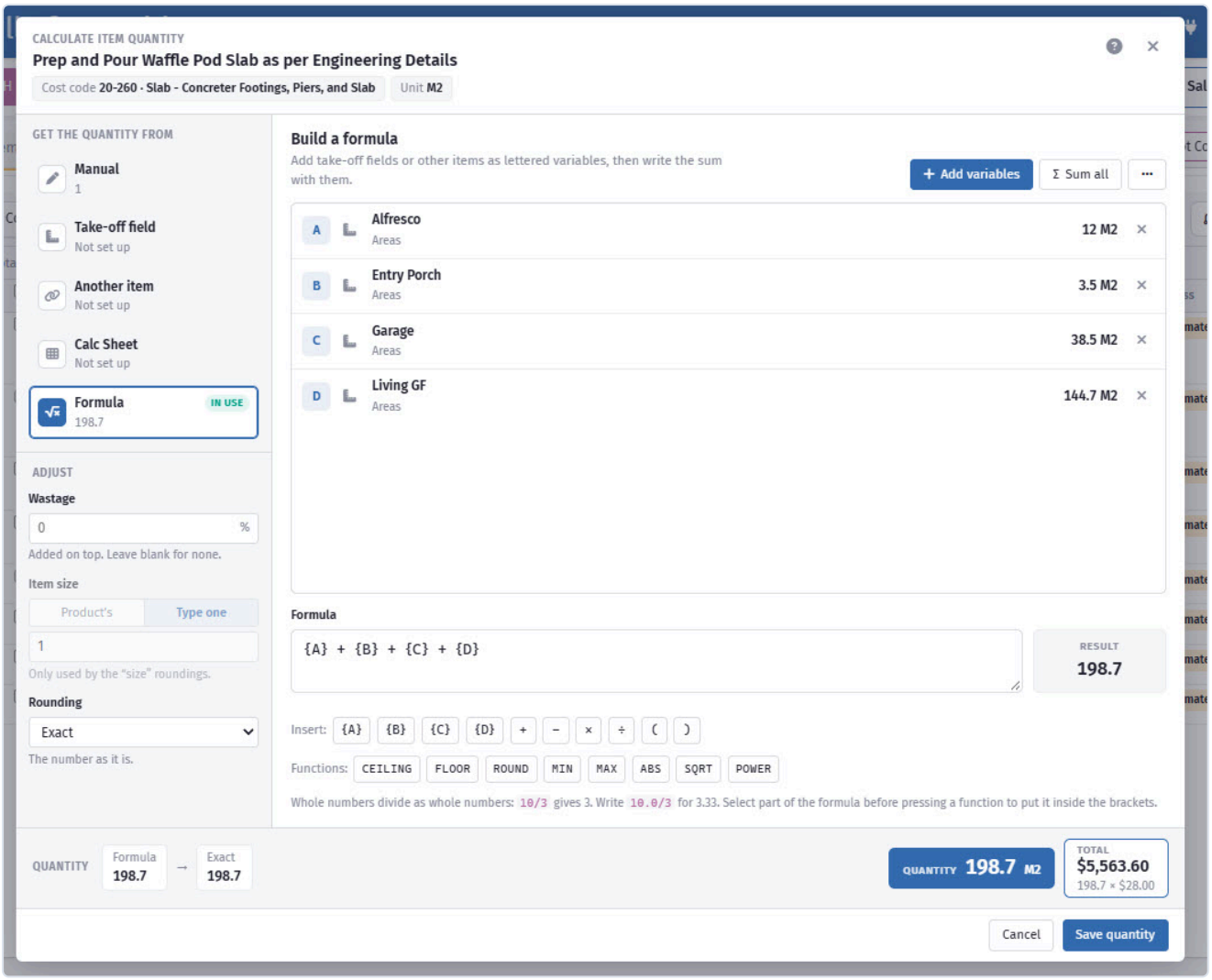
> **The old window** — If you need the previous **Take off fields** window, add `?LegacyTakeOffFields=1` to the BOQ page address. `?NewTakeOffFields=1` switches back.

18.6 Formula fields

Deriving one quantity from another so a single change flows through the whole bill, with worked examples.

A formula derives a quantity from other quantities. It is what turns a bill from a list of numbers into something that responds to a change.

Measure the slab once. Let the mesh, the membrane, the sand bed and the concrete all derive from it. Change the slab and all four follow.



A formula works the quantity out from the fields you measured.

Variables

A formula refers to **formula variables** — named values you define on the estimate. **Add Formula Variable** creates one, and **Assembly Values** groups the ones belonging to an assembly.

A variable is a value with a name: `SlabArea`, `WallHeight`, `ExternalPerimeter`, `RoofPitch`. Set it once and use it in as many formulas as you like.

Take-off fields can supply variables too, so a measured value becomes available to every formula in the estimate.

Writing a formula

Formulas use ordinary arithmetic: `+`, `−`, `×`, `÷`, brackets, and the variables you have defined.

Item	Formula	Reads as
Slab mesh	`SlabArea * 1.05`	Slab area plus 5% laps
Vapour barrier	`SlabArea * 1.1`	Slab area plus laps and turn-ups
Slab concrete	`SlabArea * SlabDepth`	Area × depth
Edge formwork	`SlabPerimeter`	Straight from the perimeter
Wall paint	`WallLength * WallHeight * 2`	Both faces
Skirting	`WallLength - DoorOpenings`	Wall run less the doors

Worked example: a slab that looks after itself

Set up two variables on the estimate:

Variable	Source	Value
`SlabArea`	Take-off field `Slab area`	186.40
`SlabDepth`	Typed	0.10

Then price five items off them:

Item	Unit	Formula	Quantity
Concrete N32 supply and place	m^3	`SlabArea * SlabDepth`	18.64
SL72 mesh	m^2	`SlabArea * 1.05`	195.72
Vapour barrier	m^2	`SlabArea * 1.1`	205.04
Bedding sand	m^3	`SlabArea * 0.05`	9.32
Concrete pump	item	— (typed 1)	1

Now the client adds a metre to the alfresco. You drag one corner in Take-Off, the field goes to 194.80, and **four of those five quantities update themselves**. The pump stays at one, correctly, because it was typed.

That is the entire argument for formulas in one example.

Where formulas take priority

A field that gets its quantity from a formula is **read-only in Take-Off**. The formula is the source of truth, so Take-Off shows it and refuses to measure into it.

If you want to measure the field off a drawing instead, clear the formula first.

When not to use a formula

- **When the relationship is not real.** If the mesh area only *usually* follows the slab, a formula will be silently wrong on the job where it does not.

- **For one-offs.** A formula for a single item you will never revisit is more work than typing the number.
- **When the working is the point.** If you want the derivation visible as a set of dimensions, use the calc sheet instead.

Checking your formulas

Two habits worth having:

1. **Sanity-check the first result.** A formula that produces 1,864 m³ of concrete instead of 18.64 has a decimal in the wrong place, and it will look plausible in a total.
2. **Change a variable and watch.** Nudge `SlabArea` and confirm every dependent item moves. If one does not, it was typed rather than derived.

> **Name variables so the formula reads like a sentence** — `SlabArea * SlabDepth` is obviously right. `A1 * D` is not, and you will not remember what `D` was. The name costs nothing and is the difference between a bill someone else can check and one only you can.

Keeping formula results current

A formula's answer is worked out once and stored, so it has to be recalculated when something it refers to changes. **The BOQ now does that for you.**

Change a quantity and, once you stop typing for a moment, the grid quietly recalculates every formula in the estimate. You will see **Updating formulas...** appear briefly next to the toolbar's circular-arrows button. There is nothing to click and no message when it finishes — the figures are simply right.

It waits for a pause rather than recalculating on every keystroke, so keying quantities down a whole trade is one recalculation at the end, not one per row.

What triggers it, and what does not

A formula can only ever refer to three things: a **take-off field's quantity**, **another item's quantity**, or an **item's productivity rate**. So:

Change	Recalculates?
A quantity	Yes
Saving the Calculate Quantity screen	Yes — the method, wastage, size and rounding all change the quantity
Switching an item on or off	Yes — a switched-off item counts as zero in a formula
Changing an item's rounding	Yes — it changes the quantity the formula reads
Deleting an item	Yes
A cost or a price	**No** — no formula can read a rate
Adding or importing an item	No — nothing refers to it yet

That is why editing a rate never sets anything off: it genuinely cannot change a formula result. If an estimate has no formula-driven items, none of this ever runs.

Refresh Formulas is still there on the toolbar for forcing a recalculation yourself.

> **A formula it cannot read needs you** — If a formula cannot be worked out, the recalculation **stops there** and a **Formula needs attention** warning appears on the toolbar, naming the item.
>
> **Click the warning** and it opens that item's Calculate Quantity screen on the Formula tab, ready to fix. You do not have to go and find the item yourself — which matters, because a recalculation covers the whole estimate and the item it stopped on can be under any cost code, not just the one you are looking at.
>
> Worth clearing rather than living with: every formula item after the broken one is left unrecalculated too. Automatic recalculation pauses in the meantime, otherwise it would keep retrying the same broken formula. Save a working formula and it recalculates and clears the warning by itself.
>
> The same warning appears if you press **Save** on the Calculate Quantity screen with a formula that cannot be read. The item's quantity is stored as zero until it is fixed, so the warning is there to stop that zero going unnoticed once the screen is closed.

18.7 Assemblies

Add a whole kit of items in one action, all driven by one measurement, and save your own kits for the next job.

An assembly is a kit: a group of price list items that belong together, each one driven by the same measurement. Add the kit once, take the measurement once, and every item in it gets its quantity.

A bathroom is the obvious example. Floor tiles, wall tiles, waterproofing, shower screen, vanity, tapware — twenty items you add the same way on every job. As an assembly it is one click, and the floor area you measure drives every item that depends on it.

What comes with SmarteBuild

The library starts with 27 residential kits, built from the SmarteBuild Residential price list, covering a house from approvals to handover:

Stage	Kits
Before you start	Preliminaries and approvals · Site establishment
Slab	Waffle pod slab · Underslab services and lead-in
Frame and roof	Timber frame and trusses · Suspended timber floor · Metal roof, fascia and gutter
External walls	Brick veneer external walls · Lightweight cladding walls · Rendered blueboard walls · Windows and external doors
Services	Plumbing rough-in · Electrical rough-in and fit-off · Hot water and gas · Air conditioning
Lining and fit out	Insulation, plasterboard and cornice · Bathroom · Kitchen · Internal doors and fixing carpentry
Finishes	Internal painting · External painting · Floor tiling · Timber and carpet flooring · Garage door
Outside and handover	Driveway and paths · Fencing and gates · Clean and handover

They are a starting point, not a rule. Add one, delete what the job does not have, and save your own version — see **Saving your own** below.

Each one arrives as a plain list of items on their own quantities. Put the questions and formulas on top yourself, once, and from then on the kit measures itself — see **The take-off sheet** below.

Adding one

The **Assemblies** button at the top of the BOQ, next to **Measurements**, opens the window. The left side lists:

- **Library** — the assemblies you can use: the ones SmarteBuild ships and the ones your company has saved.
- **On this job** — the assemblies this estimate already uses, with how many items each one drives.

Click one and the right side shows exactly what adding it would do, before anything is created:

- **Measurements it uses** — the fields it needs. A field marked *reused* is already on this job, so whatever you have measured against it carries straight over to the new items. Any measurement only needs to be taken once.
- **Items it adds** — each item, the cost code it lands in, which measurement drives it, and its price. Items already on this job are marked, so you can see you are adding another. Anything that cannot be added says why.
- **The cost at one of each**, so you know the size of what you are adding.

Add N items to the job creates them. They land in the cost code each item belongs to, exactly as importing one item does, and the ones driven by a measurement come in on that measurement.

Setting the measurement

An assembly's items have no quantity until its measurement has one. There are three ways to give it one:

- Type it in the Measurements window.
- Measure it on the plan with Take-Off.
- Work it out on the assembly's own take-off sheet — see below.

Whichever you use, every item on that measurement updates at once.

The take-off sheet

Under **On this job**, click an assembly to open its take-off sheet. This is where an assembly stops being a list of items and starts doing the arithmetic for you: you type in the room, the wall, the window, and it works out every measurement the items need.

The sheet has four tabs.

Measure

A row for each thing you are measuring, a column for each question the assembly asks, and the measurements it works out on the right.

#	What it is	+/−	Length	Height	Wall area	Studs
1	North wall	+	8.4	2.7	22.68	20
2	South wall	+	8.4	2.7	22.68	20
3	Window W3	−	1.8	1.2	2.16	0
				Total	**43.20**	**40**

What it is is your own note — "north wall", "less W3", "ensuite". The +/− button flips a row between counting towards the total and being taken off it, so openings, cut-outs and deductions come off rather than on. Click it to flip.

The totals at the bottom are what the items are priced on. If a formula cannot be worked out for a row — a divide by zero, a value left blank — that cell shows **ERR** and the row is left out of the total.

Change anything and the totals move straight away, but the items keep the numbers they were last given until you press **Recalculate**. A warning across the top says when the two have drifted apart. **Recalculate** works every measurement out and puts the new totals onto the items.

Measurements

The measurements themselves: what each one is called, its unit, how it is worked out, wastage and rounding.

- **Formula** — leave it empty and you type the number in yourself. Fill it in and it works itself out from the answers on every row of the sheet.
- **Wastage %** — added on top of the result. 10 on a tile area gives you 10% more.
- **Rounding** — exact, round up, round down, one or two decimals, or into and by pack size. Sheets and packs round up; hours usually do not.

Questions

What the sheet asks on every row: wall length, height, how many. Each question has a long name for the column heading, a short name for formulas to use — `L`, `H`, `QTY` — and a starting number.

A question can also be a list of **choices** instead of a typed number. The estimator picks the name, the formula gets the number behind it: "Double skin" → 100, "Single skin" → 50. Use it for anything that is really a decision rather than a measurement: wall type, roof pitch, fixing centres.

Items

Every item this assembly prices, and what that comes to.

Priced off is a dropdown on each row: pick a measurement and the item takes its quantity from it, pick *its own quantity* and it goes back to whatever you typed — the number it had is still there waiting. The list offers **every take-off field on the job**, not just this assembly's, because one measurement often drives items in several kits: the same wall area pays for the bricks, the wrap and the painting. This assembly's own measurements come first, then each other assembly under its own name.

An item on a calc sheet or a formula of its own is left alone; the row says which it is on, and putting it back on *its own quantity* does not disturb it.

Add item puts one more item on the assembly. Type what you are after and it looks in two places at once:

- **Already on this job** — an item in the BOQ that is not on this assembly yet. **Put it on this** moves it onto the measurement chosen above.
- **From the price list** — anything you can price. **Add it** brings it into the job, into the cost code it belongs to, exactly as importing one item does, and puts it on the measurement in the same action.

Either way the quantity is right immediately — there is nothing to press afterwards.

Writing a formula

A formula is written the way you would say it, using each question's short name in curly brackets:

You want	You write
Wall area	`{L}*{H}`
Perimeter	`({L}+{W})*2`
Studs at 450 centres	`CEILING({L}/0.45)+1`
Labour hours	`{L}*{H}*{$P}`
Nothing under 5 m	`IF({L} > 5 THEN {L}*{H} ELSE 0 END)`

The chips under the box put the questions, the operators and `IF…` in for you, so there is nothing to remember. `{$P}` is the measurement's own productivity rate — the hours or the rate per unit — kept separate so you can change the rate without touching the formula.

`CEILING` rounds up, `FLOOR` rounds down, and `ROUND`, `ABS`, `SQRT`, `POWER`, `MIN` and `MAX` all work as you would expect.

Try it is the part worth using. Type in some answers, press it, and it tells you what the formula gives — wastage and rounding included, exactly as the sheet will show it. If the formula is wrong it says what is wrong with it, instead of waiting until the numbers are on a job.

Building one from scratch

New assembly at the bottom of the Assemblies window starts an empty one on this job. Build it in the order the sheet is laid out:

1. **Questions** — what you will be measuring. Start with the two or three that everything else comes from.
2. **Measurements** — a formula each, tested with **Try it**.
3. **Items** → **Add item** — search for each item, pick the measurement that drives it, and add it. It does not matter whether it is already on the job or still in a price list.
4. **Measure** — type in your first real take-off and check the numbers.
5. Tick those items in the BOQ and **Save as assembly…**, and it is in your library for the next job.

The sheet's header has three buttons: rename it, copy it, or take it off the job. The copy makes a second copy of the whole assembly here — questions, measurements and every line — which is the quick way to do the same room twice with different numbers.

Taking it off the job removes its questions, measurements and lines. The items stay in the BOQ on the quantities they have now. It is refused while anything is still priced off one of its measurements, so nothing

loses its quantity without you saying so — set those items to *its own quantity* under **Items** first.

Saving your own

When you have built something once, save it and never build it again.

1. Tick the items in the BOQ.
2. **Save as assembly...** in the **Actions** menu on the toolbar.
3. Give it a name and save.

It goes into your company's library, and any job can add it afterwards. Nothing on the current job changes.

Save over an existing one in the same window replaces one of your own assemblies instead of adding another, so a kit you have improved on this job becomes the version everyone gets next time. Jobs that already used the old one are not touched.

An item already driven by a measurement is saved with that measurement, so the kit arrives wired up on the next job. An item with its own typed quantity is saved with a measurement of its own name, for whoever uses it next to fill in once.

> **Only price list items can be saved** — An assembly is a list of price list items, so an item typed straight onto a job cannot go into one. The window lists any that were left out. Add them to a price list first — see Suppliers and products — then save the assembly again.

Saving needs access to **Price lists** with permission to edit it, because the assembly is shared with everyone in your company.

Keeping your library tidy

Hover an assembly under **Library** and two buttons appear: rename it, or remove it from your assemblies. Both apply to the library copy only — jobs that already used it keep their items and their measurements.

The assemblies that come with SmarteBuild are shared with every builder, so they cannot be renamed, changed or removed. Add one, change it on the job, and save your own version.

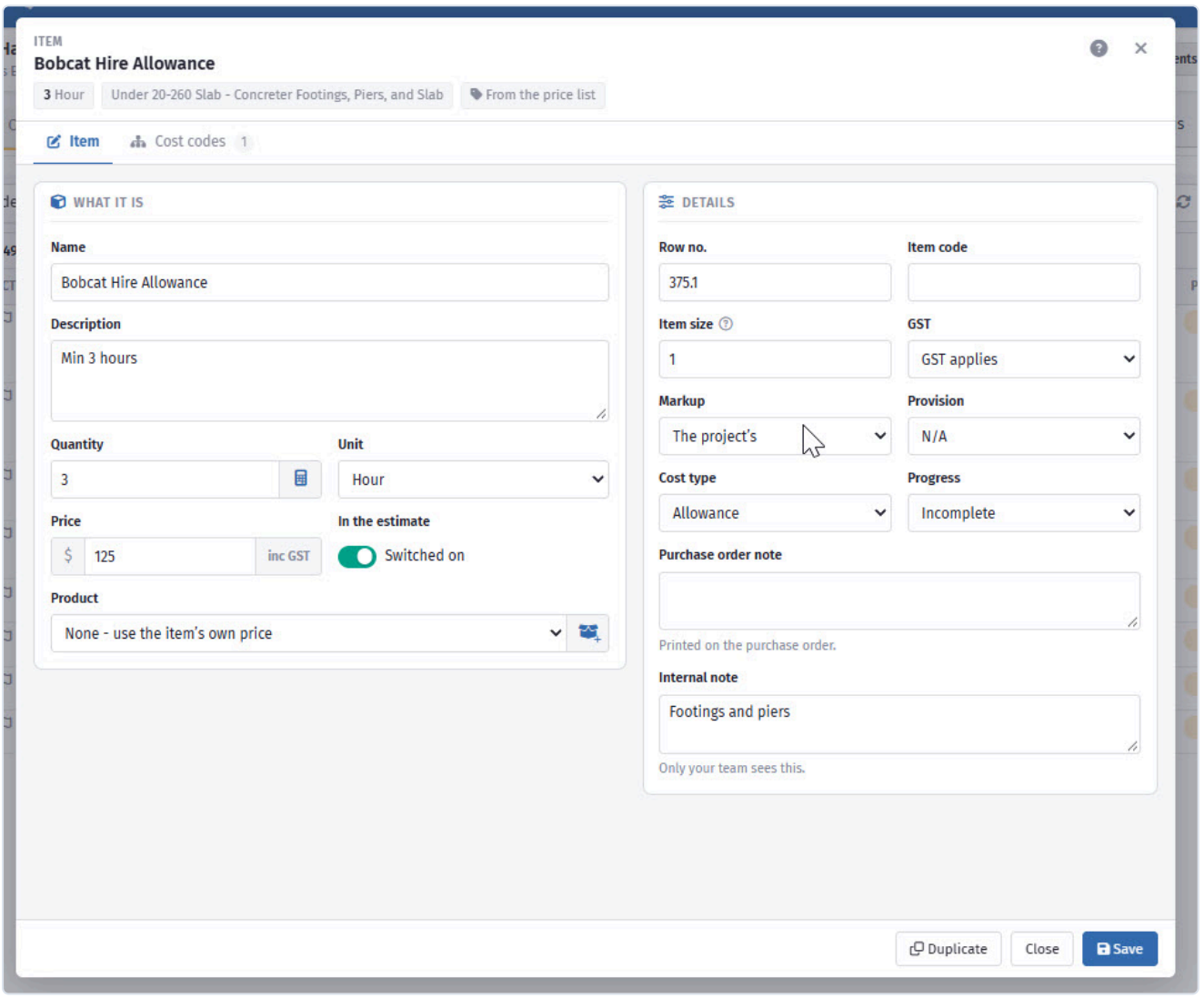
What an assembly does not do

- It does not change prices. Items come in at the price list price that applies to you, the same as any other import, and Renew prices keeps them current afterwards.
- It does not stop you adding the same kit twice. Add it again and you get a second set of items; the preview tells you which ones are already there.
- Deleting items from a job does not change the assembly in the library, and changing the library does not reach back into jobs that already used it.

18.8 Prices, markups and GST

Where an item's rate comes from, how item markup interacts with estimate markup, and keeping rates current.

An item's **Price** is the cost per unit — what the work costs you, before any margin. Markup is applied on top, and is kept separate on purpose.



Overheads, margin and GST applied to a line.

Where a rate comes from

Source	How it behaves
A price list	Linked, so it can be refreshed later
A supplier's product	Linked to that supplier's pricing
A received quote	Fixed at what the subcontractor quoted
Typed by hand	Fixed until you change it

Items carrying a **Link to Pricelist** are the ones you can update in bulk. Typed rates are invisible to every refresh, which is fine for genuine one-offs and a liability for anything recurring.

Keeping rates current

An item whose price list price has moved shows a pink price alert in the grid; click it to take the new price for that one item.

For the whole job, click **Renew** on the ribbon. The **Renew prices** window lists every item whose price no longer matches the price list:

Column	What it shows
Current / **New**	The price on the job now, and the price list's price
Change	How much it moved, as a percentage
Total change	The new price minus the old, times the quantity

- The new price is **your own price** where you have set one in Price lists (marked **Your price**), otherwise the SmarteBuild price.
- Items are ticked to start with. Untick any you want to keep at the old price, or use **Went up** / **Went down** and the search box to narrow the list. **Renew** only changes the items shown: filter to **Went down** and it renews just those.
- Pick a **cost code** (type part of its name to find it) to renew just that part of the job.
- Click a column heading to sort by it; click again to reverse, a third time to go back to the original order.
- Drag the edge of a column heading to widen or narrow it (double-click the edge to reset). Your widths are remembered on that computer.
- **Estimate change** at the bottom is what renewing the ticked items does to the job's total. Switched-off items still get the new price but do not change the total.
- Items already **ordered** or **billed** are locked while **Lock Ordered or Billed Items** is on, and are never changed.
- Tick **Also update product names, SKUs and details** to refresh the product description as well. Notes you wrote on a product are kept.
- **Export CSV** saves the list, for example to show the client why the price moved.
- After renewing, **Undo** puts the old prices back.

Refresh all products... does the old "Renew all the products of this estimate": every supplier product on the job, used or not, gets the price list's details and price. It cannot be undone.

> **Do not renew prices on a submitted tender** — Refreshing rates on an estimate you have already quoted changes what the job says it costs, and your submitted price no longer matches your bill. The window warns you when the job is a tender, contract or under construction. Duplicate the estimate first if you want to see what current rates would do.

Item markup

Item Markup applies to a single item. Use it for work you price differently from the rest of the job — a supply-only item you carry less margin on, or a trade you mark up harder because it carries more risk.

An item with its own markup gets **that markup instead of** the estimate's percentage markups: 10% item markup on a line means that line is priced at exactly 10% over cost. Fixed-amount markups are still added once to the estimate as a whole. The Bill of Quantities totals bar and the Projects page work it out the same way.

If you want most items marked up the same way, do it at estimate level and leave item markup alone. See Markups.

GST

The **GST** field controls whether GST applies to an item, at the rate set on the project.

Most items carry it. The ones that typically do not are statutory fees and charges — council permits, certifier fees, some authority connections. Getting these wrong overstates your price by 10% on those lines, which is usually enough to notice but not always enough to spot.

A GST-free item gets no GST in the estimate's GST and quote total (on the Bill of Quantities totals bar and the Projects page alike), or on its purchase orders, supplier invoices and Xero.

To check them, open **Filter** on the Bill of Quantities toolbar and tick **GST-free**. It lists every GST-free item in the cost codes you are looking at. To change many at once, tick them and use **Actions → Set GST**.

Showing cost against actuals

Show Actual Costs Columns adds committed and actual cost alongside your estimate, once orders and invoices exist.

This is how you see the estimate holding up as the job runs — allowed, committed, spent, side by side per item. It is worth turning on the moment the job is won, and leaving off while you are still estimating, when the columns are all empty.

A worked check

The Hendricks slab, from cost to sell:

Concrete 18.64 m^3 @ $228/$m^3$	$4,250
Mesh 195.72 m^2 @ $9.40/$m^2$	$1,840
Vapour barrier 205.04 m^2 @ $3.10/$m^2$	$636
Bedding sand 9.32 m^3 @ $62/$m^3$	$578
Pump 1 item @ $850	$850
Slab cost	**$8,154**
Overheads 8%	$652
Margin 12%	$978
Slab sell, ex GST	**$9,784**
GST 10%	$978
Slab sell, inc GST	**$10,762**

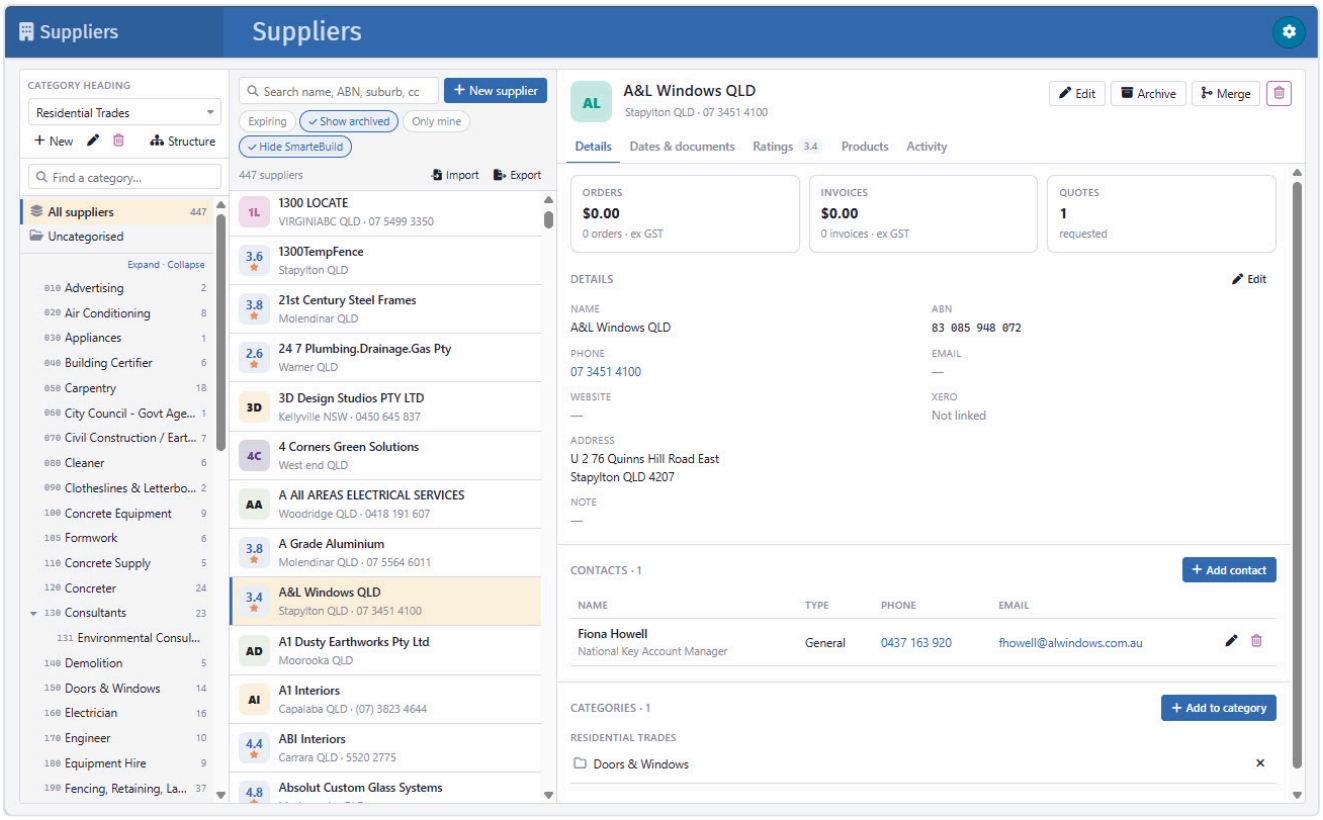
The cost line is what you would defend to a subcontractor. The sell line is what the client sees. Keeping them separate is what lets you change one without disturbing the other.

18.9 Suppliers and products

Attaching a supplier and a product to an item, what that enables downstream, and managing the products on an estimate.

An item can name the **supplier** you intend to buy it from, and the specific **product** you priced.

Neither is required to build an estimate. Both matter enormously once the job is won, because they are what let a purchase order write itself.



An item with a supplier attached becomes that supplier order line.

The fields

Field	What it holds
Supplier	Who you are buying from
Supplier SKU	Their part number
Manufacturer	Who makes it
Manufacturer Code	The manufacturer's code
Link to Pricelist	The price list entry the rate came from
Related bid	The tender bid this rate came from, if any

Why the supplier matters

Purchase Orders groups by supplier. Items with a supplier attached collect into an order for that supplier automatically — the right items, the right quantities, the right descriptions, without you assembling anything.

Items with no supplier have to be assigned by hand at order time, one at a time, on every job.

> **Attach suppliers while you estimate, not when you order** — You know who you priced it with at the moment you price it. Three weeks later, when you are raising twenty orders in an afternoon, you do not. Filling the field takes a second during estimating and saves minutes each at ordering.

Why the SKU matters

Supplier SKU prints on the order. A supplier receiving a part number does not have to interpret your description, which is where substitutions and wrong deliveries come from.

It matters most on anything with variants — tapware, tiles, hardware, appliances, anything with a finish or a colour. "Chrome mixer" is not an order; a SKU is.

Manufacturer details

Manufacturer and **Manufacturer Code** matter where the client has specified a product, or where a warranty depends on what was installed. They also feed the job specification, so the handover documents say what actually went in.

Choosing a product for an item

The **Products** button on a BOQ row opens the product picker for that item. It is where you decide which product the item is priced from.

> **Choosing a product changes the price** — Once a product is selected, the item is priced from **that product's price**, not its own rate. The top of the picker shows the rate, the quantity and the line total, and they change the moment you pick something. **Use the item's own rate instead** puts it back.

The picker has two tabs — or one, on an item you typed onto the job yourself: an item that did not come from a price list has no price list item behind it, so the **From the price list** tab and **Add to price list** do not appear for it at all.

On this item lists the products the item already has - its own copies, each with its supplier, price and picture. **Use this** selects one. The pencil opens it to edit: supplier, SKU, manufacturer, finish, colour, size, a note, a picture. Editing a copy never changes the price list.

A picture can be uploaded or fetched from a web address. The address must be the **picture itself** - right-click the image on the supplier's site and copy the image address - not the page it sits on. Pictures over 10 MB, and addresses that are not ordinary public websites, are refused with the reason; the old picture stays until a new one has arrived.

From the price list lists the supplier products offered by the price list item this item was imported from, at the price that applies to your company - your own price where you have set one. **Add and use** copies one onto the item and selects it; **Add** copies it without selecting. Products already on the item are marked. Your own price list products can be changed, or deleted, from here too — see below. **Edit in Price lists** opens the whole item on the Price lists page.

Switching tabs reloads that tab, so products you add or change on the Price lists page show up as soon as you come back to **From the price list** — no need to close the picker and open it again.

Search and the supplier dropdown work across whichever tab is open, and the supplier dropdown only lists suppliers that actually have a product there. Cards or a list - the switch beside the search box - is remembered for you.

What each product would cost you

Every product shows what choosing it does to the money, so you are not doing sums in your head:

- **saves $1,240 on this line** / **+$380 on this line** - the difference to the line total (the price difference times the item's quantity) against what the line is priced at now. In Colour Selection it compares with the client's current choice.
- **cheapest** - the lowest price on the tab, when there is more than one.
- **Buy 42 × 2.88 = $1,890** - for a product with a size (one sheet covers 2.88 m²), how many whole ones to order and what they cost. Hover it to see how much is left over.
- **Last ordered $52.10** / **Last invoiced $54.00** - the last time your company bought this product (or the same product from the same supplier) on a sent purchase order or a supplier invoice, on any job, and whether it is dearer or cheaper now. Needs the Purchase Orders module and permission to see order values.
- **+8% since 12 Mar** - your price list price has moved since then. The product's window shows the whole history as a small chart.
- **Quote #58213 12 Sep** - the product came from a supplier's quote; it turns amber once the quote is more than 30 days old, so you check it is still good.

Using it for the other items on the job

When you choose a product for an item, the picker checks for other items on the same job that come from the same price list item (or, for an item typed onto the job, have the same name and unit) - the same plasterboard in every room, say. If there are any, a bar offers to price them from it too. **Choose items...** lists them with what each line changes by and the total change to the estimate; tick the ones you want and press **Use it for...**. Nothing changes until you do. The layers button on the chosen product opens the same list later.

Adding a product from a supplier's website

In **New product**, paste the address of the product's page on the supplier's website and press **Fill in**. The name, brand, SKU, description, colour, material, price and picture are read off the page, and the supplier is matched from your suppliers by their website or name. Check it and press **Add product** - nothing is saved before that. Prices on supplier websites include GST, so **inc GST** is ticked for you; untick it if the page showed the price without GST.

Supplier quotes and asking for a price

The **Quotes** tab lists every supplier quote for this item - newest first, with its date and age, the line total it gives, the lowest one marked - and any supplier you have asked who has not answered yet. **Use this quote** prices the item from it (in Colour Selection it makes it the client's choice).

Ask for a price puts the item on a tender - a new one, or one already on the job - and adds the supplier contacts you tick (suppliers already on the item are suggested; search for anyone else). **It does not send anything.** The tender opens on the Tender page, where you check the email, attach drawings and press Send, as with any tender. When the quote comes back it appears on the Quotes tab. Needs the Tenders & Quotes module; seeing quoted prices needs permission to see tender prices.

Keyboard

Key	Does
/	Jump to the search box
↑ ↓ (and ← → on cards)	Move between products
Enter	Use the highlighted product (or add and use it, on the price list tab)
1, **2**, **3**	On this item / From the price list / Quotes
Esc	Clear the search

Adding a product to the price list from here

New product on the **From the price list** tab adds a product to the price list item itself, not just to this job — so every job that uses that price list item can pick it afterwards. Fill in the name, supplier and price (the rest is optional) and **Add to the price list**. It appears in the list straight away, ready to **Add and use** on this item. It needs access to Price lists with permission to edit it.

(The **New product** button on the **On this item** tab is the other one: that types a product onto this job only, and never touches the price list.)

Changing a price list product from here

On the **From the price list** tab, a product your company owns carries a pencil. It opens the price list product itself — name, description, supplier, price, SKU, maker, finish, colour, material, profile, size and note — and **Save to the price list** writes it back to the price list, so every job that uses it from now on gets the new details. A changed price is recorded in the product's price history, the same as editing it on the Price lists page.

If your company has its own price for the product, the window shows it at the top: that is the price jobs get. Changing the price in the window makes the new price your price from today as well - the old one stays in the price history.

- Products supplied with SmarteBuild open read-only — their button is an eye, not a pencil. They are shared with everyone and cannot be changed; set your own price for one on the Price lists page instead.
- You need access to **Price lists** with permission to edit it. Without that permission the window opens read-only - an eye instead of a pencil - even for your own products.
- The button sits at the right-hand end of each row, after **Add and use** and **Add**.
- Saving here does not change the copies already sitting on jobs. Those keep what they have until you renew prices.

Delete in that window removes the product from the price list for good, with its price history, and takes it off the price list items it was attached to. It asks first and tells you what it is attached to. Jobs keep their own copies — nothing on an estimate, order or invoice changes — but those copies stop being linked to the price list, so renewing prices no longer reaches them. Deleting needs permission to delete from Price lists, which is separate from permission to edit.

When the price list has moved

A product copied from the price list keeps the price it had when it was copied. When the price list changes, the product shows a badge - *price list $640* with an arrow - and **Update from price list** appears in the toolbar with a count.

If an item has two copies of the same price list product (for example one copied and then changed to another colour), each is updated only when you ask for it - updating one never overwrites the other.

Each product on the **On this item** tab also has its own circular-arrows button: **Update this product from the price list** takes that one product's name, description, supplier, SKU, maker, finish, colour, size, picture and price from the price list product it came from. It asks first, shows what the price becomes, and warns when the estimate is priced from it. Anything typed on the copy is replaced; the price list itself is not touched.

Update from price list in the toolbar does the same for every product that has moved, in one pass. It opens a preview: each product that has moved, its price now and its price list price, all ticked. If the estimate is priced from one of them, it shows what the line total becomes. Nothing changes until you confirm, so an estimate never moves because somebody edited the price list.

> **Not on a submitted tender** — The same rule as renewing prices: updating a product on an estimate you have already quoted changes what the job says it costs.

Tidying up

Remove unused lists the products on the item that nothing uses - not selected, not on an order, invoice, quote or bid, and not a client's colour choice - and removes them when you confirm. A product that is in use - on a tender, a quote (including a product a supplier quoted in its place), an order, an invoice or a client's colour choice - cannot be deleted; the picker says where it is used.

New product types one in, for something that is not in the price list.

Adding products to the price list

A product typed on the item can go into the price list, so the next job that uses the same price list item can pick it instead of typing it again. **Add to price list** in the toolbar - its count is how many products on the item are not in the price list - or the cloud button on one product opens a preview, with each product showing what will happen:

- **New in price list** - it is added under the price list item this estimate item was imported from, with its supplier, SKU, details, price (ex GST) and picture.
- **Links to existing** - that price list item already has the same product (same supplier and SKU, or the same name when there is no SKU), so this copy is linked to it rather than added twice.
- A product with no supplier cannot go in until you give it one.

The cloud button only appears on a product that is **not** in the price list yet, so a product that came from the price list does not have one. The toolbar button stays put either way: when there is nothing left to add it greys out and says so.

Neither appears on an item you typed onto the job yourself. Products can only be filed under the price list item an estimate item was imported from, and a typed item has none — import the item from a price list if you want its products to go back.

Nothing changes until you confirm. Afterwards the product shows as *From the price list* on this item, and **Update from price list** keeps it in step from then on. Adding needs access to Price lists, and only works for an item that was imported from a price list.

In Colour Selection the same picker records the **client's choice** instead, and shows the estimate's product next to it for comparison. It does not change the estimate. When the item's category has an allowance, the header shows how much of it is left with the current choice, and every product says whether choosing it stays **within allowance** or how far it goes **over**.

Changing products from Colour Selection needs permission to make selections, and only works on items that are in the colour selection. A product the **estimate** is priced from can only be changed, updated from the price list or deleted by someone who may also edit BOQ items, because changing it changes the job's cost.

If you have view-only access to a job, the picker opens read-only.

Managing products on an estimate

The **Items** menu carries product-level commands:

Command	What it does
Add new product	Creates a product against the item
Renew prices	Updates rates from the linked source
Renew all the products of this estimate	Refreshes everything at once
Remove all unused products	Clears products no item refers to
Export all products	Exports the product list

Remove all unused products is worth running after heavy editing. Products orphaned by deleted items clutter the pickers and slow things down without affecting any price.

Export all products produces the buying list for the whole job — useful for a supplier who wants to quote the package rather than line by line.

Related bid

Where a rate came from a tender, **Related bid** links the item back to the bid.

That link is what answers "who quoted this, and when?" six months later. It is filled in automatically when you bring a bid into the bill from Tenders, so it costs you nothing.

Worked example: ordering the slab

The slab items were priced with suppliers attached:

Item	Supplier	SKU
Concrete N32	`Barwon Concrete`	`N32-20-80`
SL72 mesh	`Surf Coast Steel`	`SL72-6X2.4`
Vapour barrier	`Surf Coast Steel`	`VB200-4X25`
Concrete pump	`Barwon Concrete`	`PUMP-CALLOUT`

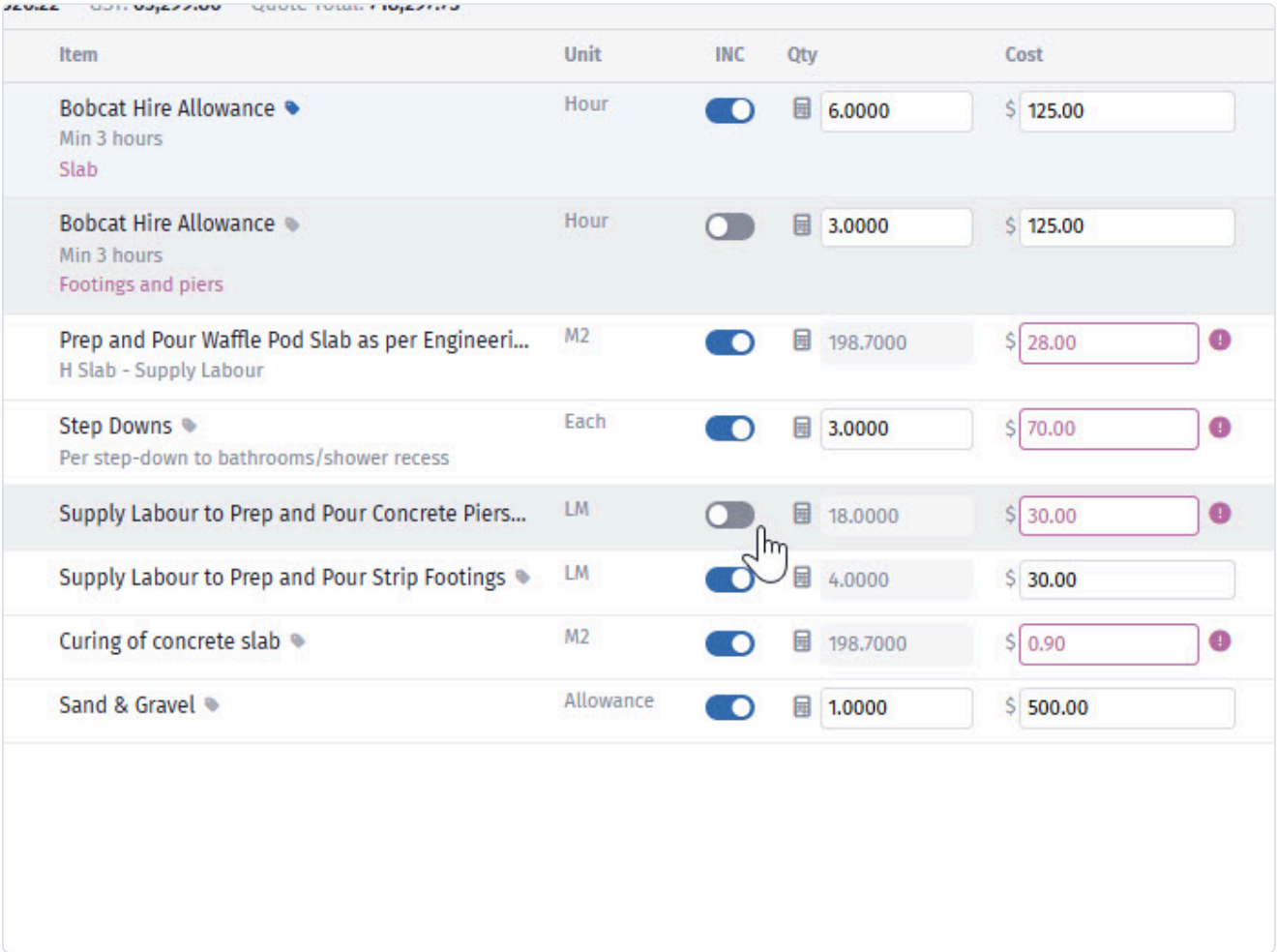
When the job is won, Purchase Orders produces two orders — one to Barwon Concrete, one to Surf Coast Steel — each carrying the right items with part numbers and the site address already on them.

Had the supplier fields been blank, that would have been four items to assign by hand before anything could be sent.

18.10 Organising items

Cost codes, sorting, headings, orphan items and filtering - keeping a long bill readable.

A bill of two hundred items is only useful if you can find your way around it. These are the tools that keep it navigable.



A switched-off item stays on the job but stops counting towards the total.

Cost codes

Edit Cost Codes sets the code on an item — which cost code it belongs to. **Change Cost Codes Heading** re-labels a heading in the tree.

Moving an item to a different cost code is the most common structural edit you will make, and it is worth doing as soon as you notice, because everything downstream groups by it. An item coded to the wrong trade turns up on the wrong purchase order.

Sorting

Change Sorting sets the order items appear in within their cost code, and **WBS tree sorting** controls the order of the tree itself.

Ordering items in **build sequence** rather than alphabetically makes a bill much easier to check. Excavate, form, reinforce, pour, finish reads like the job happening; a gap in that sequence is a missing item, and you can see it.

Sorting a column to look at the bill

Click a column heading — Item, Product, Supplier, Unit, Qty, Cost, Total, PS/PC, Progress, Status, and Ordered or Actual Cost if you have added them. Click again to reverse it, a third time to put the bill back in its own order. A faint arrow on the heading shows which ones you can click, and your choice is remembered.

This is a way of *looking* at the bill, not a change to it: nothing is saved, and the order that prints, orders and reports is the one you built. Sorting by Total finds where the money is; by Supplier, everything going to one trade; by Status, what is still an estimate.

Because the rows beside an item are not its real neighbours while a column is sorted, **dragging rows into a new order is switched off** until you clear the sort — the handle says so if you hover it. The same is true when several cost codes are shown at once.

Organise Items

Organise Items and **Reorganize selected items** restructure the bill in bulk — moving groups of items between cost codes, or resequencing them.

Use it after importing from a template that does not quite match the job, or after a structure change. It is much faster than editing items one at a time, and it is the tool to reach for when a bill has grown untidy rather than living with it.

Items not in a cost code

An item can end up on the job but in none of its cost codes, which is called an *orphan*. It still has its quantity and rate, and some of the job's totals still count it, but no cost code's total does, and it won't go onto an order.

When a job has any, the BOQ says so in a yellow strip at the top: *"12 items ($48,300 switched on) on this job aren't in any cost code"*. The cost code list also shows a **Not in a cost code** row pinned above **All items**. Click either one to list them. The bar above the list says why each one is there:

- **No cost code at all**: usually its cost code was deleted, or it was added while the BOQ showed **All items** (that can't happen any more; see below).

- **A blank cost code**: usually a job copied from another company.
- **Filed under a cost code list that was taken off the job.**

To fix them:

- **File them**: pick a cost code (type to find it) and press **File**. It files the ticked items, or every item listed if none are ticked.
- **Put the list back**: for items still filed under a cost code list that was taken off the job, **Put "..." back on this job** switches that list on again, and they're all filed at once.
- **Delete them**: tick them and use **Delete** in the **Actions** menu on the toolbar.

Nothing is created to hold them. **Not in a cost code** isn't a real cost code, so it never appears in templates, reports or Xero.

New orphans are no longer made by accident:

- **+ Item** while the BOQ shows **All items** asks which cost code the item goes under.
- **Duplicate** and **Paste** while showing **All items** put each copy under its original's cost code.
- Deleting a cost code, or switching a cost code list off a job, says how many items (and how much money) would be left without one first.

> **Careful** — An orphaned item is the classic explanation for a total that is right while the trade subtotals do not add up to it. It is in the bill, but it is not in any trade.

Filtering the view

Several settings narrow what you are looking at:

Setting	What it does
Only Included Items	Hides switched-off items
Only Selected WBS	Shows one cost code at a time
Hide Empty Nodes	Suppresses cost codes with nothing in them
Show Archived	Brings archived material back into view

Hide Empty Nodes is what makes a full standard structure usable on a small job. Import your fifteen-trade template onto a bathroom renovation and eleven of the trades are empty; hide them and the bill reads as though it was built for the job.

Only Selected WBS is the one to use when you are working a trade at a time. Pricing the whole of `800 Services` without the other fourteen trades on screen is faster and much less error-prone.

Show Buttons

Show Buttons controls which action buttons appear on each row. Turning off the ones you never use gives more width to the columns you actually read — worth doing on a laptop.

Choosing columns

The columns icon at the right-hand end of the header row switches columns on and off:

Column	Starts
Product	On
Supplier	On
PS/PC	On
Progress	On
Status	On
Ordered	Off
Actual Cost	Off

Switch off what you do not use and the rest of the columns get the width. An estimator who prices by rate rather than by product usually turns **Product** and **Supplier** off; a job in construction usually wants **Ordered** and **Actual Cost** on — see Over budget.

Your choice is remembered against your login, so it follows you to another computer, and it is yours alone — it changes nothing for anyone else on the job. Column widths are remembered the same way: drag the edge of any column header.

Flags

The **Flag** field marks an item for your own attention. There is no fixed meaning to it, so give it one and be consistent — most people use it for "come back to this".

Flag an item with the flag button at the start of its **Actions**. On, the flag turns solid orange and the row goes yellow; click it again to clear it. **Flagged** (the flag button) on the toolbar then lists just those items.

Flag anything you have typed a quantity for that should really be measured, any rate you are unsure of, and anything waiting on a price. Then work the flags down before you submit.

A practical routine for a large bill

1. Build the structure first, in build sequence.
2. Import from your template, then **Hide Empty Nodes**.
3. Work one trade at a time with **Only Selected WBS**.
4. Flag anything provisional as you go.
5. Before submitting: clear the flags, check there's no **Not in a cost code** warning at the top of the BOQ, and check the trade subtotals add to the job total.

Step five takes two minutes and catches most of what goes wrong in a bill.

18.11 Bulk operations

Selecting, copying, moving, duplicating, deleting and switching items on or off in bulk.

The **Operations** menu acts on whatever you have selected. Everything here works on many items at once, which is the difference between an afternoon and five minutes when a bill needs restructuring.

Selecting

Command	What it does
Select All	Everything currently visible
Select none	Clears the selection

Select All respects your filters. If **Only Selected WBS** is showing one cost code, Select All takes that cost code — which is usually what you want, and occasionally a surprise. Check what is on screen before running a destructive operation on a selection.

Orders, invoices, quotes, variations and tenders

Order, **Invoice**, **Quote**, **Variation** and **Tender** — on the ribbon above the bill, and in the **Operations** menu — start that document from the items you have selected.

With nothing selected, every item shown goes in. Pick a cost code, click **Order**, and the whole cost code is on the order. "Shown" means what is on screen, so a search or a filter such as **Included** narrows it; clear them first if you want everything under the cost code. Select items only when you want some of them.

Items from several suppliers become several orders. If the items going onto an order come from more than one supplier, **Order** raises one order per supplier instead of one mixed order you would have to split by hand. Leave the **Supplier** box in the order window blank for this; choosing a supplier there keeps everything on one order for that supplier. See Raising orders from the BOQ.

Switched-off items follow your tick. An item that is not included is carried in the estimate without being counted. With nothing selected, **Order** leaves those items off and the message says how many; tick one deliberately and it is ordered.

Moving and copying

Command	What it does
Copy	Copies the selection
Cut	Marks it to be moved
Paste	Places it at the current point
Duplicate selected	Copies in place

Cut and **Paste** move items between cost codes, which is how you fix a group of items coded to the wrong trade in one go.

An item that is on an order, an invoice, a tender, a quote or a colour selection cannot be moved this way. **Paste** puts a copy in the new place and the original stays where it was, still attached to those documents — delete or switch off the one you do not want.

Copy and **Paste** work **between estimates**, so you can lift a whole trade from one job to another. That is often faster than re-importing from a price list, because it brings the quantities, suppliers and notes as well as the rates.

The quantity comes across even when it is worked out: a calc sheet comes with its lines, and a quantity taken from another item, a formula or a take-off becomes a typed quantity equal to the original's (those links point at the other job, so they cannot come with it). Wastage and rounding stay as they were. For choosing where each item lands, with a preview, use Comparing estimates.

> **Copying between estimates is an underused shortcut** — Priced a bathroom on the last job that is nearly identical to this one? Copy the whole cost code across and adjust, rather than rebuilding it from the price list.

Duplicating

Duplicate selected copies items in place, complete with rates, descriptions, suppliers and notes.

Use it for repeated elements — three identical bathrooms, eight identical units, two identical carports. Duplicate, then edit what differs.

Check the descriptions afterwards. A duplicated item still describing *Unit 1* while sitting under Unit 2 will reach a subcontractor's order saying Unit 1.

What a copy keeps. The quantity comes across whichever way it was worked out — a typed figure, a calc sheet, a linked item, a measured field or a formula — and a copied formula reads the same fields and items the original did. Copy it to a *different* estimate and the formula is cleared instead, because the fields and items it referred to are not there.

Switching on and off

Command	What it does
Switch on selected	Items count toward the total
Switch off selected	Items stay in the bill but do not count

This is how you price options. Carry both the tiled roof and the colorbond roof, switch on whichever the client has chosen, and the total follows.

It is also the safe alternative to deleting while a client is still deciding. A switched-off item keeps its rate, its supplier and its history at no cost.

Worked example: pricing an option

The Hendricks client is undecided between a tiled and a colorbond roof.

1. Price both, in cost code `500 Roofing`.
2. Select the colorbond items and **Switch off selected**.

3. The total reflects the tiled roof.
4. Client changes their mind: switch the tiled items off and the colorbond on.

Two clicks, no re-pricing, and both options stay on the record.

Setting rounding on many items

Set rounding applies one rounding rule to every selected item at once — the same **Output** setting the Calculate Quantity screen sets one item at a time.

Select the items, choose **Set rounding**, pick the rule, and **Apply**. Useful when a whole trade should order the same way: every concrete line to the nearest tenth of a cubic metre, every timber line up to the whole length.

> **This changes quantities, not just how they look** — Rounding is applied to the quantity itself, so the line totals and the estimate total move with it. Check the total afterwards.

The three size-based options — **Into Size**, **By Size** and **By Size Rounded Up** — are deliberately not offered here. Each needs a size for the individual item, so set those from Calculate Quantity where the size lives.

Setting the cost type or GST on many items

Actions → Set cost type gives every ticked item the same cost type: Labour, Material, Subcontractor and so on, or **Not set**. It only changes which group an item sits in. No quantity, rate or total moves.

Actions → Set GST marks every ticked item **GST applies** or **GST-free**.

A quick way to sort out a whole trade: turn on **Group by cost type** (under **Filter** on the toolbar), tick the items in the **Allowance** or **Not set** group that belong elsewhere, and set them in one go. See cost types.

Adding items to a price list

Priced something on a job that you will price again? **Add to price list...** copies the selected items into one of your price lists, with all their products, so the next job can pick them up from the price list instead of typing them again.

To see which items still need it: an item that is already in a price list has a small tag beside its name. Press **Not in price list** (the tag button) at the top of the BOQ to list only the items typed straight onto this job. That's a quick check before you close a job out.

1. Select the items and choose **Add to price list...**.
2. Pick the **price list**. It starts on the one this job's cost codes came from.
3. Check each item's **cost code**. Each one starts on the price list cost code its job cost code was copied from, or one with the same code or name. Type to find another. **Put every item in** files them all under one cost code.
4. Tidy the **name** if it says something that only suits this job ("Concrete supply – Lot 12 driveway"). The new name is checked against the price list as you type.
5. Press **Add**.

What goes across: the name, description, unit, price (what the BOQ totals it at), wastage, item size and rounding settings. For products:

- A product that already came from the price list, or has the **same supplier and SKU** as one there, is **linked**, not copied, so it isn't in the price list twice.
- Any other product is **copied in**, picture included.
- A product with **no supplier** can't be added, because every price list product needs one. The window says which.

> **It warns before doubling up** — When the price list already has something that looks the same, the row turns yellow and lists it: *this item came from it*, *same name*, or *similar name*. Two selected items with the same name and unit are flagged too. If you can see costs, each one shows both prices and the difference: *price list $230.00 · this job $245.00 (+6.5%)*. A difference of more than 25% is shown in red. Check it, because whatever goes into the price list goes into every future quote.
>
> An item that came from the price list, or has the same name, starts on **Skip it**. Your other choices:
>
> - **Update it from this job**: tick what to take from this job (price, description, unit, wastage, item size). Each detail shows old → new. The new price is added to the item's price history, dated today, so the old price is still on record. Its products are added as well.
> - **Record this job's price as your price**: for SmarteBuild's shared items, which nobody can edit. The price is kept as your company's own price for that item, and every job you price from then on uses it.
> - **Only add its products to** the existing item (your own items only).
> - **Add it as a new item anyway**.

Nothing on the job changes, except that each item now remembers which price list item it is. Adding it again later warns straight away. New price list items start as not approved, like any new item in Price Lists. You need the Price Lists module and permission to edit price lists.

When it's done, the window offers **Save as assembly...** for the same items. Items typed straight onto a job can't go into an assembly until they're in a price list, so this turns a priced section of the job into a kit the next job adds in one go. See Assemblies.

Deleting

Delete selected removes items permanently.

Items that are on an **order**, an **invoice**, a **tender**, a **quote** or a **colour selection** are skipped, because deleting them would take their lines off those as well. The rest are deleted, and the message says how many were skipped — for example *3 item(s) deleted. 1 skipped (has dependencies)*. Deleting a single item from its row refuses in the same way and names what the item is on.

Before you use it, consider whether **Switch off** would do instead. Deleting takes the rate, the supplier link, the notes and the take-off field relationship with it, and none of that comes back.

> **Careful** — Check your filters before deleting a large selection. **Select All** takes everything currently visible, and "currently visible" depends on **Only Selected WBS**, **Only Included Items** and **Hide Empty Nodes**. It is worth glancing at the item count before confirming.

Locked items

With **Lock Ordered or Billed Items** on, items that already carry an order or an invoice will not be changed by bulk operations.

That is the setting doing its job. If a bulk edit skips some items, check whether they are locked before assuming the operation failed — the lock is protecting the relationship between what you committed and what you allowed.

18.12 Specification

Building the job specification out of the bill, choosing what the client sees on each line, and printing it.

The **job specification** is the written description of what you are providing. In SmarteBuild it is built out of the bill rather than written separately, which is what stops the two drifting apart: if an item is not in the bill, it is not in the specification.

> **This is the point of the feature** — The classic dispute is a specification promising something the estimate never priced. Building one from the other makes that mismatch hard to create by accident.

Putting items in the specification

Two ways, and you can use both:

- **From the BOQ.** Tick the items, open **Actions** on the toolbar and choose **Add to Specification**. Items already in it stay in it; the message tells you how many were added and how many were there already.
- **From the Specification window.** Press **Add items**, type part of a cost code or its name to find it, tick the items you want and press **Add**. Only items that are not in the specification yet are listed.

The Specification window

Open it with **Specification** on the BOQ's **Reports** tab.

- **Down the left**: the cost codes that have items in the specification, with a count. A yellow count means something in that cost code needs attention. **All cost codes** shows everything. The search box finds items by name, description, wording or product.
- **On the right**: one section per cost code. Each line shows the item, its product (with a picture when there is one) and its quantity. Click a section's heading to fold it shut or open it again; **Collapse all** / **Expand all** does every section. A folded section still shows how many items it holds and how many need attention. While you search, every section with a match opens.
- **Along the top**: totals, and how many lines need attention. Click that to see only those.

What prints on each line

Every line has four switches. They save as soon as you click them.

Switch	Prints
Item	The item's name and description, or your client wording (below)
Product	The chosen product, its description and maker
Quantity	The quantity and unit
Allowance	For PC and PS items: the allowance, with its amount

To change many lines at once, tick them (or tick a cost code's heading to take the whole section) and use the bar that appears: quantity on or off, product on or off, item on or off, or remove.

Remove from specification takes the item out of the specification only. It stays in the BOQ, priced as before.

Client wording

The item description is written for your subcontractor. The client needs different words. Type them in the box under the item, and that is what prints instead of the name and description. It saves when you click away. Leave it empty to print the item as it is.

Item description (to trade)	Client wording
`N32 concrete, 80mm slump, supply and place`	`Concrete slab to engineer's design`
`SL72 mesh, 40mm cover, 300mm laps`	`Steel reinforcement to engineer's design`
`200µm vapour barrier, taped laps, sealed to edge`	`Damp-proof membrane under slab`

Needs attention

A line is flagged when the client would see something odd:

- **Switched off in the BOQ**: you are no longer providing it, but it is still in the specification.
- **PC or PS allowance not shown**: the client is not told it is an allowance, which is where most variation disputes start.
- **No product chosen**: Product is switched on but the item has no product.
- **Nothing switched on to print**: every switch is off, so the line prints nothing.

Tick **Only what needs attention** to work through just those lines.

PS and PC items

Items flagged **PS/PC** carry an allowance for something not chosen yet. Switch **Allowance** on for them, and the printed line says *Prime cost (PC) allowance* or *Provisional sum (PS)* with the amount. The printed specification adds a note that differences from the allowance are adjusted by variation.

Good client wording helps here too:

> *Tapware: prime cost allowance of $1,200, supply only. Client to select.*

A client who has read that is not surprised when the tapware they choose costs $1,900 and a variation follows.

Preview, print and export

- **Preview** (top right) shows the specification exactly as it prints. Tick **Show pictures** to see it with product pictures.
- **Print** and **Print with pictures** open the specification in a new tab and bring up your browser's print window. Choose **Save as PDF** there to attach it to a quote or contract.
- **Export to Excel** downloads the same lines as a spreadsheet.

All three follow what is on screen: pick one cost code on the left to print just that cost code, or **All cost codes** for the whole job. **Leave out items switched off in the BOQ** is ticked to start with; the window remembers your choice.

If nothing happens when you press Print, your browser blocked the new tab. Allow pop-ups for SmarteBuild and press it again.

> **Who can do what** — Changing the specification needs permission to edit the BOQ. Printing and exporting need permission to print BOQ reports. Allowance amounts show only to people who can see costs.

18.13 Comparing estimates

Two estimates side by side or stacked, a Differences table that explains why one costs more, and copying items from one to the other with a preview.

Compare on the Bill of Quantities toolbar opens this estimate next to another one of your company's estimates. Use it to price a new job from an old one, or to see why one job costs more than another.

Opening two estimates

It opens with every cost code closed except the one you were looking at in the Bill of Quantities: that one is open, scrolled into view and briefly highlighted - on both sides when **Keep in step** is on and the other estimate has a matching cost code. It also remembers what you compared: open Compare from an estimate you have compared before and the other one is already chosen - the last one you put next to it, on any computer you sign in on. Choose a different one and that becomes the one remembered.

Back to BOQ (top left) returns to the Bill of Quantities of the estimate you came from, on that cost code.

Each side has its own estimate picker - type part of the job name, the estimate name, a code or the suburb. Only estimates you are allowed to open are listed. The page address remembers both, so you can bookmark a comparison or send the link to a colleague (they still need access to both jobs).

- **Side by side** or **Stacked** - the switch at the top left. Stacked suits long item names on a narrow screen.
- **Swap** puts the two the other way round.
- **Keep in step** (on by default): opening or closing a cost code, searching, or changing the cost code set on one side does the same on the other. Cost codes are paired up the same way the copy does it - see below.

Each side shows its cost codes with their totals, and the items in them with quantity, rate and total. The footer shows the estimate's total and how much more or less it is than the other one. Rates and totals follow your **See costs and rates** permission.

Nothing can be edited here - change items in the Bill of Quantities as usual. This page only looks and copies.

Copying items across

1. Tick items on one side - or tick a cost code to take everything in it.
2. Press **Copy ... to the right** (or left, above, below).
3. Check the preview, then press **Copy**.

Dragging instead

Drag an item, or a whole cost code, across to the other estimate:

- **Drop it on a cost code** and everything goes into that cost code.
- **Drop it anywhere else** on that side and each item goes to its own matching cost code, as with the button.
- Drag one of your **ticked** items and all the ticked ones go together.

While you drag, the other side is outlined and the cost code under the pointer lights up. An estimate you cannot add items to says so and does not take the drop. Dropping opens the same preview as the button, already filled in, so nothing is copied until you press **Copy**. (Dragging needs a mouse; on a tablet use the tick boxes and the button.)

The preview lists each item and the cost code it goes into on the other estimate:

- **Matched** - the same cost code, one copied from the same template, one with the same code, the same place and name, or the same name, in that order.
- **No match - choose one** - that estimate has nothing like it. Choose a cost code for it (type to search), or use **One cost code for all of them** at the top. Copy stays locked until every ticked item has a home.
- **Already in that cost code** - the same item (same price list item, or same name and unit) is already there, so it starts unticked. Tick it if you really want two.

Quantities come across correctly

The quantity comes with the item:

How the quantity is worked out	What the copy gets
Typed	The same typed quantity
Calc sheet	The calc sheet lines, so it works out the same
From another item, a formula, or a take-off	A typed quantity equal to the original's figure - the preview says so, because the links to the other job's items, formula or drawings cannot come with it

Wastage and rounding stay as they were, so the copied item's quantity matches the original exactly. (Copy and paste in the Bill of Quantities between two jobs used to lose these quantities, leaving the copy at 0. Both now keep them.)

Products come with the item. Copying needs permission to add and edit items on the estimate you copy into; an estimate you can only look at cannot receive items.

Differences - why one costs more

Differences (next to Side by side and Stacked) puts the two estimates in one table, **A** on the left and **B** on the right:

- Each cost code with A's total, B's total and the difference. A cost code B does not have says *not on B*; B's cost codes that A does not have come at the end.
- Each item next to its counterpart - paired by price list item, then item code, then name and unit, then name - with **Why**: *quantity −6*, *rate +$2.00*, *switched off in B*, *only in A*, *only in B*. The same item filed under a different cost code on each side shows as *different cost code* rather than one removed and one added.
- At the top, the totals and where the difference comes from: **Quantities** (including items switched on or off), **Rates**, **Only in B** (items added) and **Only in A** (items left out). The four add up to the difference exactly.

Only differences (on by default) hides the lines that match; **Differences over $** hides the small ones; the search finds an item on either side.

- **Excel** downloads the rows you are looking at as a spreadsheet, with the cost code, both quantities, rates and totals, the difference and the reason.
- **Print / PDF** prints the table landscape - choose *Save as PDF* in the print window for a file.

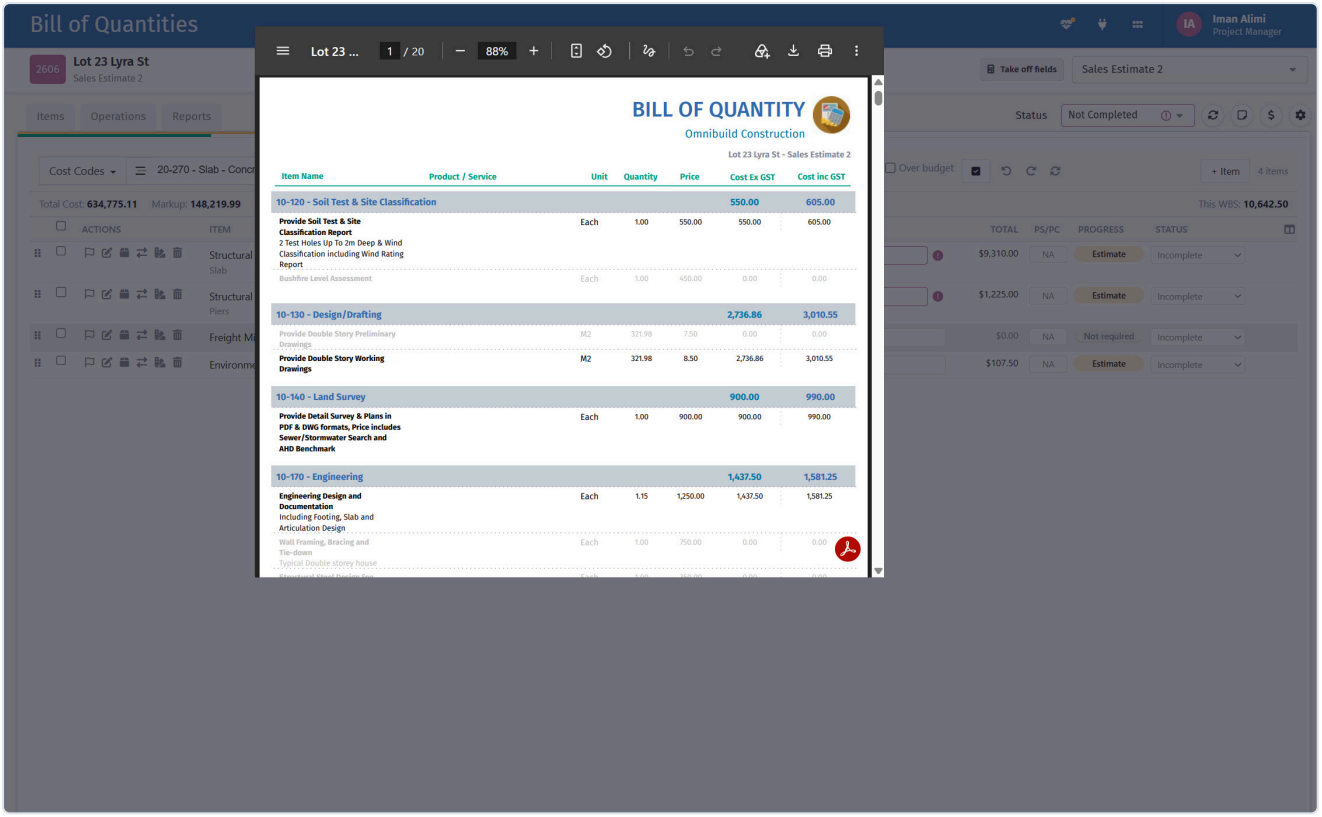
Without **See costs and rates** the table shows quantities only.

> **Pricing a new job from an old one** — Open the old job on the left and the new one on the right, turn on **Keep in step**, and work down the cost codes: tick what applies, copy, and watch the right-hand total build up against the old one.

18.14 Reports

Which report answers which question, and what to send a client, a subcontractor and your own office.

The **Reports** menu turns the bill into documents. The useful skill is knowing which one answers which question, and — just as important — which ones must never leave your office.



The bill as a document, ready to print or send.

Choosing by audience

Audience	They should see	They must not see
Client	The price, the specification, what is included	Your cost, your markup, your suppliers
Subcontractor	The scope and quantities for their trade	Everything else
Your office	Cost, markup, margin, committed vs actual	—

> **Check what a report exposes before you send it** — The most costly mistake available in this module is sending a client a report that shows your cost and margin alongside the price. Open the report and read it before it goes, every time — particularly the first time you use one you have not sent before.

The three reports on the BOQ

The **Reports** menu carries three:

Budget Report

The trade totals and the job total — the cost side of the estimate, laid out by cost code.

This is the fastest check that nothing has been missed. Read it in build sequence: a trade with a suspiciously small total is usually a trade with items missing.

Summary Profit and Loss Report

Cost, markup and margin at trade level. One page, and the report to read before you commit to a price.

This shows your margin. It is not a client document.

Detailed Profit and Loss Report

The same thing item by item — every line with its cost, markup and resulting value.

This is the working document for checking an estimate line by line, and for finding which item is dragging a trade's margin down. Also strictly internal.

> **Two of the three are internal** — Only the Budget Report is close to something a client could see, and even that shows cost rather than sell price. Both Profit and Loss reports show your margin explicitly. Check what you are attaching before it leaves the office.

Other outputs

Specification — what you are providing, in the client's language. Attach it to the quote. See Specification.

Cost against budget — with **Show Actual Costs Columns** turned on, the BOQ itself shows allowed versus committed versus spent per item. That is the view that tells you whether the job is going the way you priced it. See Cost to date against budget.

Rate per square metre — the job total over the floor areas set in Total House Area. Blank if you never filled those in.

Before you produce a report

The report reflects the state of the bill, so tidy the bill first:

1. Clear your **Flags** — anything still flagged is unresolved.
2. Run **Show Orphan Items** — an orphan is in the total but not in any trade.
3. Check the trade subtotals add up to the job total.
4. Confirm the right options are switched on.
5. Check **Only Included Items** matches what you intend to quote.

Step three is the one that catches real errors. If the trades do not add to the total, something is coded outside the structure.

Worked example: submitting the Hendricks tender

What goes in the envelope, in order:

1. Your quotation, at the marked-up contract sum.
2. **Specification** — what is included, in plain language.
3. A covering letter noting the PC and PS allowances explicitly.

What stays in the office:

- the **Summary** and **Detailed Profit and Loss** reports — both show your margin
- the **Budget Report**, which shows your cost
- anything naming your suppliers

Then, when the job is won, the **Detailed Profit and Loss Report** becomes the working document, and the BOQ with **actual cost columns** takes over as the view you actually watch.

Exporting

Reports export for sending and for further work. Where a report is going to a client, PDF is the right choice — a spreadsheet invites the client to take it apart, and it carries whatever columns you had on screen.

Reserve the spreadsheet exports for your own use and for subcontractors who have asked for something they can price into.

18.15 BOQ settings

Every setting on the Bill of Quantities, what it changes, and the ones worth turning on before you start.

The **Settings** panel controls how the BOQ behaves and what it shows. Most are personal preferences; three change how the bill protects you and are worth setting deliberately.

The three that matter

Lock Ordered or Billed Items

Stops items being changed once a purchase order or an invoice exists against them.

Turn this on. Editing the quantity on an item you have already ordered against breaks the relationship between what you committed and what you allowed, silently. The discrepancy usually surfaces months later, when the cost-against-budget report stops making sense and nobody can say why.

If you genuinely need to change a locked item, the order against it needs revising too — which is the conversation the lock is forcing you to have.

Alert Price Changes

Flags items whose source price has moved, rather than changing them underneath you.

This is the right behaviour on a live job. You find out that concrete has gone up without your submitted tender quietly changing to match.

Show Actual Costs Columns

Adds committed and actual cost alongside your estimate.

Leave it **off** while estimating — the columns are empty and take width from the ones you are using. Turn it **on** the moment the job is won, when allowed versus committed versus spent becomes the thing you want to see.

Display settings

Setting	What it does
Hide Empty Nodes	Suppresses cost codes with nothing in them
Only Included Items	Hides switched-off items
Only Selected WBS	Shows one cost code at a time
Show Archived	Brings archived material into view
WBS tree sorting	Order of the cost code tree
Show Buttons	Which row action buttons appear
Show Job Number on the jobs list	Adds the job code as a column
Open in a new window	Opens dialogs in a separate window
Keep this page open	Stops a dialog closing after each save

Hide Empty Nodes is the one that makes a full standard structure usable on a small job — import your fifteen-trade template onto a bathroom renovation and the eleven empty trades disappear.

Keep this page open is worth ticking whenever you are adding many things in a row. It saves a click per item, which adds up over a hundred items. The **Import from Price Lists** window has its own tick box for the same thing, **Keep this window open to add more** — see Importing from a price list.

Recommended setup

While estimating:

Setting	
Lock Ordered or Billed Items	On
Alert Price Changes	On
Show Actual Costs Columns	Off
Hide Empty Nodes	On
Only Included Items	Off — you want to see the options you are carrying
Keep this page open	On

Once the job is won:

Setting	
Show Actual Costs Columns	On
Only Included Items	On — the options are decided

Everything else stays as it was.

History

The **History** view shows what changed on an item and when.

It is the answer to "this rate is not what I remember" and to "who changed the quantity?" — questions that come up on any job with more than one person working on it. Worth knowing it is there before you need it.

PART IV

Winning the work

Leads, tender packages, and the quotes that come back.

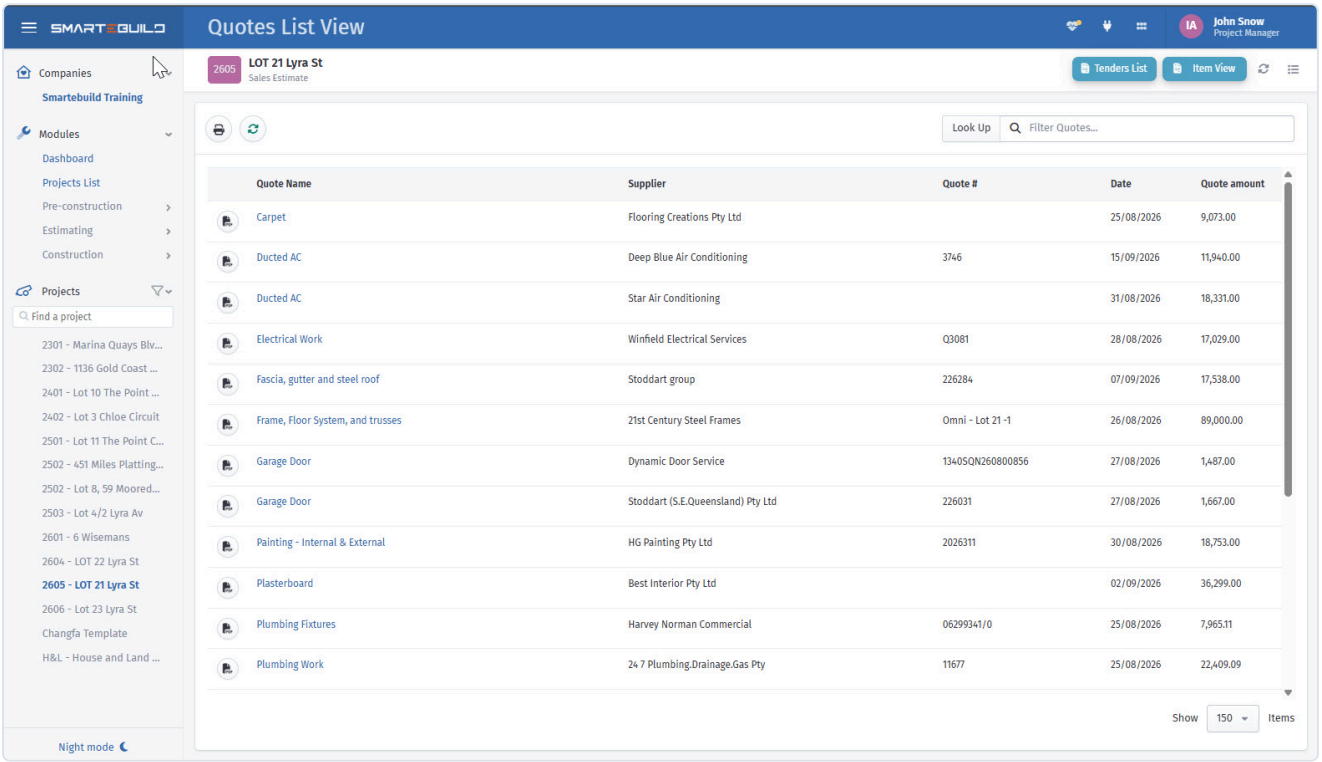
19 Winning the work
20 Leads
21 Tenders and quotes
22 Quotes received

CHAPTER 19

Winning the work

Putting packages out to subcontractors, comparing what comes back, and bringing the winning prices into your estimate.

Once the bill is built, most of the price is not yours — it is your subcontractors'. This section is about getting those prices, comparing them, and getting them back into the estimate without re-typing anything.



Every quote a subcontractor has sent you, against the job it belongs to.

Two ways a price arrives

Through a tender. You build a package from BOQ items, send it to several subcontractors, and compare what comes back. Structured, comparable, and the right approach for anything significant.

Outside a tender. A price arrives by email or over the phone. Recorded in **Quotes Received**, and attached to the items it covers.

Both end in the same place: a rate on a BOQ item, with a link back to where it came from.

Why it is worth doing here

Emailing a drawing set to five subcontractors and comparing the replies in a spreadsheet works, and every builder has done it. What it does not give you is a trail.

Six months later, "who quoted the roof, at what, and what were they told?" has to be reconstructed from a mailbox. Run through Tenders, the package, the recipients, the dates and the prices are all attached to the job, and a bid brought into the bill carries a **Related bid** link back to its source.

The shape of a tender

1. **Build the package** from BOQ items — see Building a tender package.
2. **Choose who to invite**, from your suppliers.
3. **Attach the drawings** they need.
4. **Send it**, and track who has responded.
5. **Compare the bids** and award.
6. **Bring the winning price into the bill.**

In this section

- **Leads** — enquiries in, followed up, converted into a quote, won or lost
- **Tenders & Quotes** — packages, invitations, tracking and awarding
- **Quotes Received** — prices that arrive outside a tender

CHAPTER 20

Leads

20.1 Tracking leads

The lead board, the stages an enquiry moves through, and why the enquiries you do not follow up are the most expensive thing in the business.

Leads tracks enquiries from the moment somebody asks you to price something to the moment it becomes a quote — or does not.

Why it exists

Enquiries arrive by email, phone and word of mouth, and they get lost in exactly the same way every time: nobody owns them, nobody has a list, and the ones that were not followed up are invisible because there is nothing to look at.

That is the most expensive failure in a building business, and it is silent. A job you lost on price is a job you know about. A job you lost because nobody rang back never appears anywhere.

The board makes the list exist.

The stages

A lead moves left to right:

Stage	Means
New	It has arrived, nobody has done anything yet
Contacted	You have made contact
Qualified	It is real — the budget, scope and timing stack up
Quoting	You are pricing it
Quoted	The price is with them

Plus two ways out: **Won** and **Lost**.

The board shows the five live stages as columns; won and lost drop off it so what is left is what needs attention.

Qualifying is the stage that matters

Qualified is the one people skip, and it is the one that protects your estimating time.

Pricing a job properly costs you real hours. Doing that for an enquiry with no budget, no drawings, no site and no timeframe is the most expensive way to be busy. Before moving a lead to Quoting, know:

- **What** they actually want built

- **Roughly what they expect to spend** — the Budget field
- **When**
- **Whether they are talking to four other builders**

A lead that cannot answer those is not ready to quote, and saying so is a legitimate outcome rather than a failure.

What a lead holds

Field	
Contact name, **Company (if any)**	Who is asking
Email, phone	How to reach them
Budget	What they expect to spend
Estimated value (ex GST)	What you think it is worth
Detail	The enquiry itself
Stage	Where it is up to
Last activity	When anything last happened

Estimated value is what makes the board answer a business question rather than just listing names — how much work is in the pipeline, and at what stage.

Last activity is the one to watch

Sort or scan by **last activity** and the leads nobody has touched surface immediately.

A lead at *Contacted* with three weeks of silence is the whole reason the module exists. It is not lost — nobody has decided anything — it has just been forgotten, and it is recoverable with one phone call today.

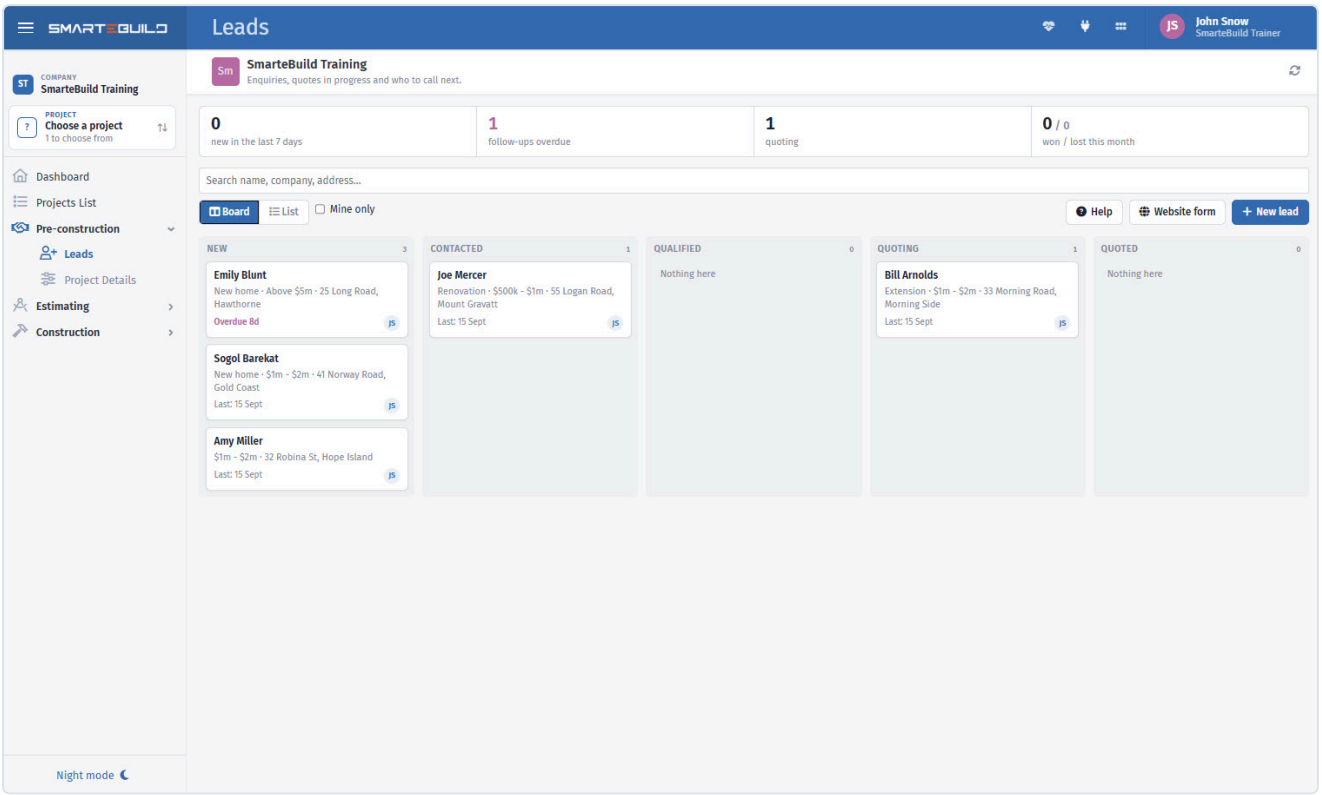
In this section

- Working the board
- Converting to a quote

20.2 Working the board

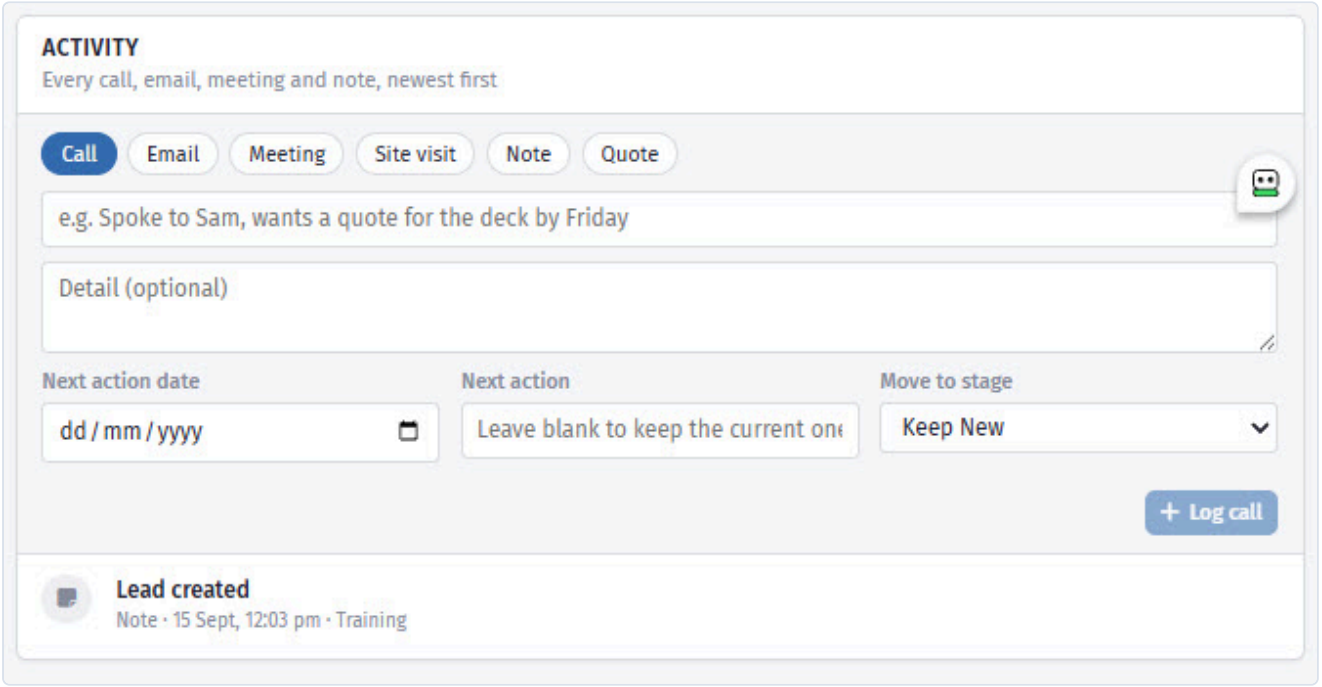
Adding leads, moving them between stages, logging activity, marking one lost, and taking enquiries straight

from your website.



Every enquiry on one board, so none of them sit in an inbox.

Adding a lead



What they want, what it is worth, and who is dealing with it.

New lead captures the enquiry: contact name, company if there is one, email, what they want, the budget, and what you think it is worth.

Add it the day it arrives, even with half the fields blank. A lead on the board with three fields filled in gets followed up; one in somebody's inbox does not.

Moving between stages

Move a lead as its state genuinely changes — **Move to stage**, or drag it on the board.

Resist moving things along to make the board look busy. A column full of leads parked at *Quoting* that nobody is actually pricing is worse than an honest *Contacted* column, because it hides the work that has not started.

Activity

Log the next step, not just what happened.

Each lead carries an **activity** log. Record what happened each time you touch it: the call, what they said, what you agreed, what you are waiting for.

Two reasons this is worth the thirty seconds.

You will not remember. Six weeks and forty enquiries later, "spoke to them" tells you nothing. "Rang 14 Oct, they are waiting on council, said ring back mid-November" tells you exactly what to do and when.

Somebody else can pick it up. A lead with a written history can be handled by whoever is available. One with no history belongs to whoever took the call, and stops if they are away.

> **Log the next step, not just the last one** — End every activity note with what happens next and when. *"Ring back mid-November"* turns the log into a to-do list rather than a diary.

Marking a lead lost

Mark as lost takes it off the board.

Do it, and record why. A pipeline that only ever grows is not a pipeline, and the reasons are the useful part:

Reason	What it tells you
Price	You were in the running — worth knowing by how much
Timing	Might come back; worth a diary note
Went with a mate	Nothing you could have done
Never responded	**Look at how long it sat at New**
Not qualified	Good — that is the system working

That fourth row is the one to watch. If leads are regularly lost to silence, the problem is not the market.

Enquiries from your website

Leads can be created directly from an enquiry form on your website, so a form submission lands on the board rather than in an inbox.

That closes the gap where enquiries are lost most often — between arriving and being noticed.

Email a copy of each enquiry to sends a copy to an address you nominate, so somebody sees it immediately as well. Leave it blank for no email.

The form is protected against automated spam, so what reaches the board is overwhelmingly real.

A weekly routine

Ten minutes, once a week:

1. Anything at **New** more than two days old — contact it today.
2. Anything with no **activity** in a fortnight — chase or mark lost.
3. Anything at **Quoted** past the date you said you would follow up — follow up.
4. **Mark lost** what is genuinely gone, with a reason.

Step four is what keeps the board honest, and an honest board is the only kind anybody keeps using.

20.3 Converting to a quote

Turning a qualified lead into a real project and estimate, and what carries across.

Once a lead is worth pricing, **Convert to quote** turns it into a real project and estimate.

What it creates

- A **project**, with the lead's contact as its client
- An **estimate** on that project, ready to price
- The link back to the lead, so its history is not lost

You are then in the ordinary estimating flow — documents, take-off, cost codes, BOQ. See Your first project, end to end.

Naming the estimate

You are asked for an **estimate name**. Use the same convention as anywhere else: name it for what it *is*.

`Tender – Rev A` tells you something in six months. `Estimate 1` does not, and the moment the client asks for a cheaper option you will have two of them.

See Estimates and templates.

Blank estimate or from a template

Blank estimate starts empty.

Starting from one of your **templates** is nearly always better — your standard cost codes and the items you carry on every job of that type. You then delete what does not apply rather than trying to remember what does.

Deleting down is both faster and safer. You forget to add things; you rarely forget to delete something sitting in front of you with no quantity against it.

> **Convert when you start pricing, not when you win** — The point of converting is to price the job. A lead that stays a lead while you build an estimate somewhere else defeats the purpose — the pipeline stops reflecting what is actually happening.

Convert late enough to mean it

The opposite failure is converting everything on arrival.

Every conversion creates a project and an estimate. Do it for every enquiry and your Projects list fills with jobs that were never real, which is how a project list stops being useful.

Convert when a lead reaches **Quoting** — when you have decided to spend the hours. Before that it belongs on the board.

The job already exists as a project

Sometimes the project was set up before the lead was, or by hand. **Link to project** (next to *Convert to quote*) attaches the lead to an existing project instead of creating another one. Pick the project from the list; a project already linked to a different lead is greyed out so two leads never claim one job. The lead moves to **Quoting** and shows the project's links. **Unlink** on the lead undoes it; the project is not changed.

Linking also works from the other direction. On **Project Details**, the client dialog has a **Fill from a lead** dropdown: the project's linked lead comes first, then every open lead. Choosing one fills the name, email, phone and address from the lead, and links the lead to the project if it was not already.

What happens to the lead

It stays, linked to the project it produced, and moves to **Quoted** once the price is out.

When the job is won, mark the lead **Won**. That closes the loop, and it is what makes the board's history worth anything: over a year you can see how many enquiries became quotes, and how many quotes became jobs.

Those two ratios are the most useful numbers a builder can have about their own business, and almost nobody has them — because it requires marking leads won and lost honestly for twelve months.

From the client's side

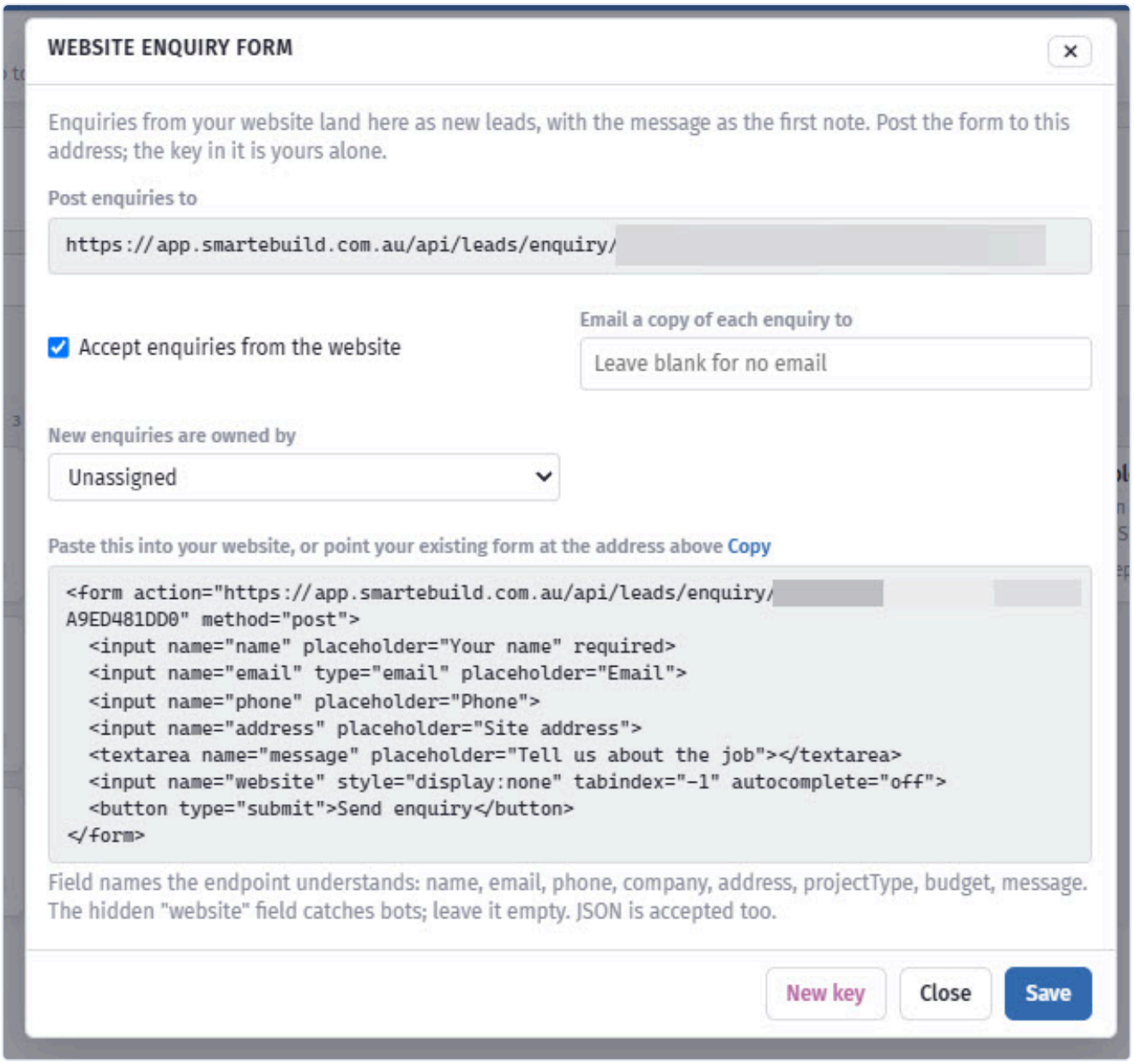
The contact on the lead becomes the **client** on the project, so their details carry across.

Check the name before you issue anything. The client name should read the way the contract will — `A & J Hendricks`, not the first name of whoever happened to send the enquiry. See Clients.

20.4 The website enquiry form

Pointing your website's contact form at SmarteBuild so every enquiry becomes a lead the moment it is sent.

An enquiry typed into your website can land in Leads by itself, as a new lead with the customer's message as its first note, owned by whoever you choose, with the next action already set to reply. No retyping, nothing lost in an inbox.



Enquiries from your website land on the board rather than in an inbox.

Setting it up

On the Leads page click **Website form**. It shows:

- **Post enquiries to** - the address your form sends to. The long key at the end is yours alone; anyone with it can create leads in your company, so treat it like a password.
- **Accept enquiries from the website** - turn the endpoint off without changing the website.
- **Email a copy of each enquiry to** - an address that gets every enquiry as it arrives, with a link to the lead. Leave blank for none.
- **New enquiries are owned by** - who the lead is assigned to.
- **New key** - if the key leaks, generate another. The old one stops working at once.

Putting it on the website

Paste the snippet from the dialog into your site, or change your existing form's `action` to the address shown and `method` to `post`. The field names the endpoint understands:

Field	Used for
`name`	Contact name. Required
`email`	Contact email. Email or phone is required
`phone`	Contact phone
`company`	Their company, if any
`address`	The site. `street, suburb state postcode` splits on the first comma
`projectType`	New home, Renovation, Extension, Commercial, Maintenance, Other
`budget`	A budget band, if you ask for one
`message`	Their message. Becomes the first note on the lead
`website`	A hidden field. Leave it empty and hidden; bots fill it and are dropped

The endpoint accepts a plain form post or JSON, and answers JSON: `{"ok":true}` when the lead was created. A website developer can post it with `fetch` and show a thank you without leaving the page; a plain HTML form works too.

What it will not do

It never says whether a key is real, so an attacker cannot probe for one. It rejects anything with neither an email nor a phone, since there would be no way to reply. And it does not send an acknowledgement to the customer; that is your website's job, and your first call.

CHAPTER 21

Tenders and quotes

21.1 How tendering works

What a tender is in SmarteBuild, the difference between a tender and a bid, and the trail it leaves behind.

A **tender** is a package of work you send out for pricing. Each subcontractor you send it to gets a **bid** — their copy, which they price and return.

One tender, several bids. That distinction runs through the whole module.

What a tender carries

Part	What it is
Items	The BOQ items the package covers
Subcontractors	The suppliers invited to price it
Files	Drawings, specifications, site information
Email	Subject and body sent with each invitation
Name and **Notes**	What it is called in the list, and internal notes

The trail it leaves

This is the reason to use it rather than your mailbox.

Every bid records who was invited, what they were sent, when it went, and what came back. A price brought into the bill carries a **Related bid** link, so an item's rate can be traced to the subcontractor who quoted it and the package they were quoting.

When a subcontractor says "that is not what I priced", the package they were sent is attached to the job rather than in somebody's sent items.

Templates and copying

Email templates save the covering email for reuse — see Building a tender package. To reuse one tender, **New tender › Start from a previous tender** copies its covering email and the subcontractors it went to, unsent. To reuse all of them, **Copy tender list** on one estimate and **Paste tender list** on another carries every package across, with its items and subcontractors, ready to check and send.

Worth setting up early. Most builders send the same twelve packages on every job, and the covering email says the same thing every time.

What good tendering gets you

Beyond the price itself:

- **Comparable bids.** Everyone pricing the same scope, so the cheapest is actually the cheapest rather than the one that left the most out.
- **A record of what was asked.** Which is what settles a scope argument later.
- **Rates in the bill with a source.** See Comparing bids and awarding.

In this section

- The tender list
- Building a tender package
- Inviting subcontractors
- Sending and tracking
- What subcontractors see
- Comparing bids and awarding

21.2 The tender list

Every tender on the estimate on one screen, where each subcontractor is up to, who needs a chase, and the actions that work across the whole list.

Tenders in the Winning Work menu opens the tender list: every tender on the estimate, with the subcontractors invited to each and what came back. It is the screen to keep open while tenders are out.

Reading it

Each tender is a group. Its header carries the name, the stage it is at, how many are invited, sent and quoted, the **budget** for its items, and the **lowest** quote in so far with the difference against the budget — a saving in green, an overrun in pink.

Under the header, one row per subcontractor:

Column	What it shows
Subcontractor	The business and the contact, with their phone number. Under the name, what the supplier record already knows: a ★ **4.2** average rating, and a red **expired** or amber **expires in 9d** badge when a dated field on the record — licence, insurance, Work Cover — has run out or will within 30 days. Nothing shows when neither is recorded
Status	Not sent, Sent, Quoted, Awarded, Not interested — or **Send failed** with the reason the mail server gave
Sent	When the email went
Quote	The amount, their quote number and date. **N quotes** means they quoted more than once; the newest is shown

Across the top, the summary strip counts tenders, invitations, sends, quotes in (with the share received) and awards.

Who needs a chase

A subcontractor sent the tender a week or more ago with nothing back is flagged on their row — *Sent 9 days ago, nothing back — worth a call* — and counted in the pink **to chase** tile. Click the tile, or the **Needs a chase** chip, to see only those tenders. Once a tender is awarded, nobody on it is chased any more.

An awarded tender has a green border, and the winning subcontractor's row is green with a star before the name.

Ring them. The help on sending and tracking explains why a second email rarely works.

Finding things

The **search box** matches tender names, subcontractors, contacts, quote numbers and notes; a match on a subcontractor keeps their tender's header so the row stays in context.

The **chips** narrow the list by stage: Not sent, Waiting (sent, nothing back), Quotes in, Awarded. **Show trashed** brings back tenders in the trash so they can be restored.

Each tender folds up with the arrow at its left, and the list remembers which are folded when you come back. Awarded tenders start folded whenever the page opens — the work on them is done — and open with a click like any other.

Working from a row

Button	Does
Notes	Your running record on that subcontractor — rang Tuesday, pricing by Friday. The count shows on the button; the newest note is its tooltip
Envelope	Opens the email they were sent
Link	Copies their personal quote link, for the "I can't find the email" call
PDF	The quote document they attached
Follow up	Chase a subcontractor who was sent the tender and has not replied. A polite email is prepared for you — the date it was first sent, a request for their price, and their quote link — with the tender's files and the item list attached again, so "I never got the drawings" is answered in the same message. Change the words, **Load** one of your templates or **Save as my template** for next time, and **What they'll see** shows the email with the placeholders filled in for that person. **Send me a copy** (ticked by default) puts a copy in your own inbox. Then **Send follow-up**: the dialog switches to the email as it was sent, it is recorded in their notes, and their "days since contact" starts again. The button turns blue once they are overdue
Add quote	Record a quote that came back by email or phone against this invitation
Read quote	Drop in the quote they sent — a PDF or a photo — and its lines are read into this tender's items for you to check before anything is recorded. See Reading a quote with AI
Award	Give the tender to this subcontractor (needs the *Accept a quote* permission). It asks whether to **update the estimate items too**: ticked, every item they priced takes their quantity, their product and their quoted price, which is what puts their rate on the purchase order later; unticked, only the award is recorded. If the supplier record says their licence or insurance has expired, the dialog says so before you confirm. Once a tender is awarded the button leaves the other rows; changing the winner, or awarding item by item across two subcontractors, is done on the tender's **Compare** tab
Undo award	On the row of the latest award on the estimate. Puts back the quotes that were chosen before and each estimate item's quantity, product and price - except items edited since, which it leaves alone and tells you about. Orders already raised are not touched. Undo the newest award first; an older one shows its button once the newer ones are undone
Not interested	They have said they will not price it; they drop out of the counts

On the header: **Open** the tender, **Items** to add or check what is being priced, **Invite** to add subcontractors, and — once anyone has been sent it — **Send update**.

Sending an update to everyone

Every real tender gets at least one *"the plans changed"* moment: a revised drawing, a clarification a subcontractor asked for, a new closing date. **Send update** on the tender's header sends one email to everyone already sent the tender, in one go.

- **To** lists everyone who has the package, ticked. Those who have quoted are included — the message asks them whether their price still stands — and anyone marked not interested, or with no usable email address, is listed but not ticked.

- **Attach** shows the tender's files. **Upload a file** puts a new document on the tender and ticks it; only the ticked files go, so the update carries what changed, not the whole package again. The item list PDF can be ticked too.
- The subject and message are yours to change. Replace the line in square brackets with what changed. The subcontractor's quote link is included, so they can re-price online. As with a follow-up, you can **Load** a template or **Save as my template**, **What they'll see** shows the email filled in for any one of the recipients, and **Send me a copy** puts one in your own inbox.

Each row shows *Processing* then *Sent*, a note "Update sent to everyone" goes on every row, and their "days since contact" starts again.

Reading a quote with AI

When a subcontractor sends their quote as a PDF, **Read quote** on their row saves it to the job's Quotes Received folder and has it read against the tender's items:

1. Drop the file in (PDF, PNG or JPG, up to 25 MB) and press **Read it**. It takes 20 to 60 seconds.
2. Check the lines. Each one shows the wording as printed on the document, the tender item it was matched to, the quantity and the price. **Check** and **Guessed** mark the lines the reader was unsure of, with its reason. A quantity that differs from the tender's is flagged beside the item.
3. Lines the reader could not match are unticked with — *not on this tender* —. The item dropdown gives you two more choices for them: **Choose another item from the estimate...** (pick the cost code, then the item in it; one not yet on the tender is put on it with the quote) and **Create a new item...** (name, unit and a cost code; the item is made on the estimate and added to the tender). If the tender has no items at all, every line starts as a new item, prefilled from the document — use **Cost code for the new items › Apply to all new items** above the table to file them all at once, then change any single line with its **Edit...**, and the subcontractor's breakdown becomes your tender. Creating items needs the BOQ edit permission.
4. **Line by line** or **One lump sum** — the default records one quote line per document line. Switch to *One lump sum* to record the whole quote's value as a single line against one item (an item on the tender, another on the estimate, or a new one); the document's lines stay on screen for reference and the price box holds the document's total, ready to change.
5. The quote number and date come off the document. Tick **include GST** if the document's prices include it — every price is then divided by the job's GST rate on the way in, so the quote is ex GST like the estimate. **Create a product for each line** (ticked by default) does what *Create new product* does on the quote page: the subcontractor's price becomes their product on each item, which is what carries it into the estimate when the quote is awarded.
6. **Create quote** records the ticked lines and attaches the document. The quote opens so the lines can be checked against the paper.

The document's exclusions are listed under the table — read them; that is where a cheap quote hides its scope gaps. The reads count against the AI allowance on your plan, shared with AI take-off. The button is only there when AI features are switched on for your company.

Starting from a previous tender

Builders tender the same trades job after job. In **New tender**, tick **Start from a previous tender** and pick one — any tender on a job you can see, searchable by tender, project or estimate. The new tender takes

its covering email, whether the item list is attached, and the subcontractors it went to, all **unsent**, so nothing goes out until you press Send. Items come across only when the source is on this same estimate (they are this job's rows); files never — attach this job's drawings before sending.

Across the whole list

New tender names one and opens it — or starts it from a previous tender, see above. **New quote** records a price that did not come through a tender — pick the subcontractor's invitation if there was one, or the supplier if not.

Under **More**:

- **Reports** — All tenders, All quotes and Tender notes as PDF, and the tender list to Excel. The three with prices need the *See quoted prices* permission.
- **Copy tender list** and **Paste tender list** — carry every tender, with its items and subcontractors, onto another estimate. Copy on the source, switch estimate, paste. Nothing is sent, and files are not copied: attach this job's drawings before sending.
- **Expand all** / **Collapse all**.
- **Delete all unsent tenders** — removes every tender on the estimate that has never been sent, with its items, files and notes. It asks first, and it cannot be undone.

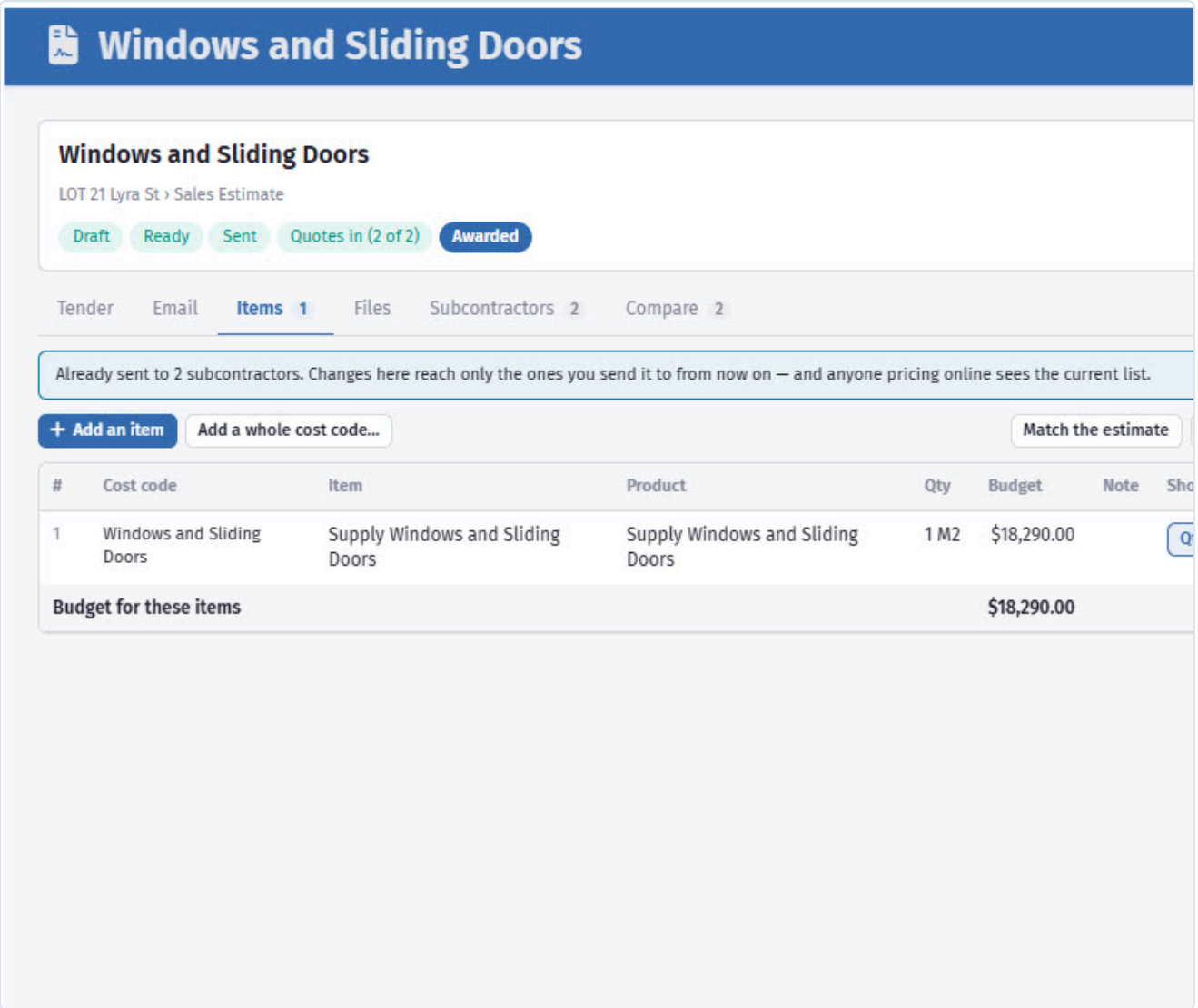
Quotes with no tender

Other quotes at the bottom lists quotes recorded on the estimate without a tender — a price that came in on its own. Open one to see its lines.

21.3 Building a tender package

Choosing the items, deciding whether to show quantities, attaching drawings, and writing a package that comes back comparable.

Choose **New** on the Tenders screen, pick the estimate, and select the items the package covers.



Pick the items a trade is pricing and the package writes itself.

Choosing the items

A package should be **one subcontractor's scope**. Not a trade, not a cost code — the work one business would price and do.

That is usually a cost code, but not always:

Cost code	Packages
`800 Services`	Plumbing, Electrical, HVAC — three packages
`300 Concrete`	Usually one — the concreter does the lot
`1000 Fixing and joinery`	Carpentry, and Cabinets — often two businesses

Getting this wrong is the most common cause of bids you cannot compare. If one recipient prices only half the package because the rest is not their trade, you have two bids covering different scopes and no way to line them up.

Adding them

Items go on the tender's **Items** tab.

- **Add an item** — type in the cost code box to find the cost code (or a heading, to see everything under it), then pick the item. Its quantity and product come from the estimate.
- **Add a whole cost code** — every item under one cost code at once. Items already on the tender are skipped, so adding the same cost code twice does no harm.

If the estimate changes after you build the package, the lines that no longer match are marked. **Match** on a row brings it back in line; **Match the estimate** does them all.

Qty and **Code** on each row decide whether the subcontractor is shown your quantity and the product code.

Attach the item list PDF

Attach the item list PDF to every invitation includes the item schedule in what the subcontractor receives.

Send it. A subcontractor pricing against your item list returns a bid that lines up with your bill line for line, which is what makes comparison and award mechanical rather than manual.

Without it, they price off the drawings and return a lump sum. You get a number, but not one you can bring into the bill against items, and not one you can compare against another lump sum with a different scope behind it.

> **Send quantities, but expect them to be checked** — Giving your quantities makes bids comparable and saves everyone measuring the same thing five times. Most contracts still make the subcontractor responsible for their own quantities — so state clearly whether your figures are for guidance or for pricing, and be consistent about it.

Attachments

Attach Files adds the documents the package needs — drawings, specifications, engineering details, the site plan, soil report. Tick them in the file picker - see Attaching files.

Attach what is needed to price the work, and no more. A roofer sent the entire 40-sheet architectural set has to find the roof plan; one sent the roof plan, the elevations and the truss layout starts pricing.

Documents can also be set to **auto-attach to all new bids** from the Documents module, which is the right way to handle the ones that go with every package. See Documents.

When a document changes after sending

A revised drawing or a clarification does not go out by re-sending the whole package. On the tender list, **Send update** emails everyone already sent the tender with only the files you tick — upload the new revision there and it is attached to the tender as well.

The covering email

The **Email** tab holds the subject and body the subcontractor actually reads first. **Insert a field** adds placeholders that are filled in for each subcontractor — their name, the project, and their own quote link.

Each subcontractor gets their own copy of this email when you invite them. If you change it afterwards, the tab tells you how many not yet sent still have the older version, and **Give them this version** brings them up to date.

Include:

- **What** the package is, and which job
- **When** you need the price back
- **When** the work is programmed for
- **Any conditions** — retention, payment terms, insurance requirements
- **Who to ring** with questions

The programme date matters more than builders expect. A subcontractor who knows the work is in March prices differently from one who assumes it is next week, and one who does not know at all often does not price at all.

Name and notes

Name is what the tender is called in the tender list. **Notes** are for your team; subcontractors do not see them. Both are on the tender's first tab.

Name tenders consistently — `Roofing`, `Plumbing`, `Electrical` — and the tenders list becomes readable across every job at once.

Templates

Email templates are on the Email tab. **Save this email as a new template** stores the text, and **Use this template** brings it back on the next tender. **Update it with this email**, **Rename** and **Delete** work on your own templates; SmarteBuild's are marked and cannot be changed — save a copy of one instead.

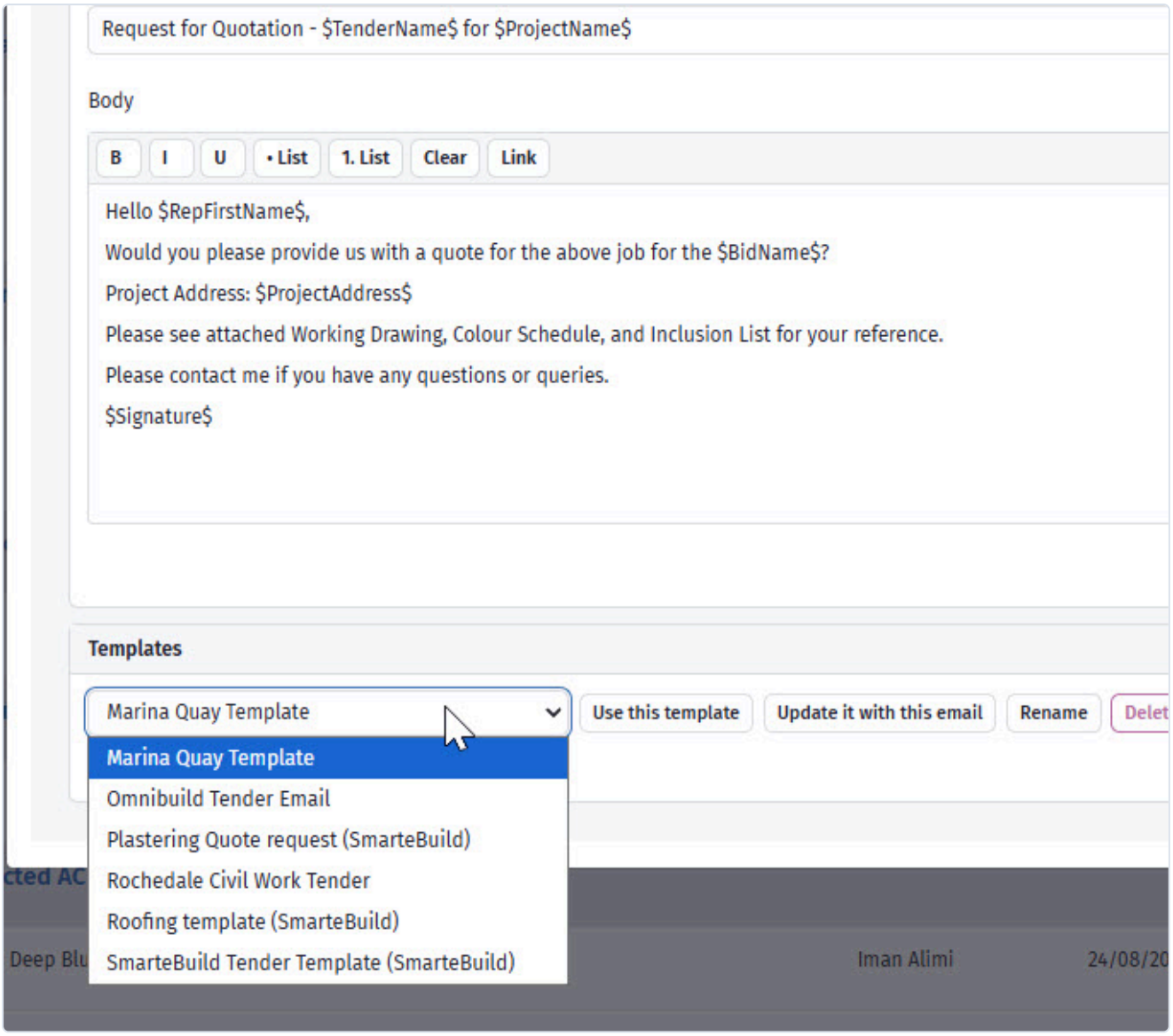
Make default sets the template every NEW tender's email starts from. That one then shows as `- default` in the list, and the button becomes **Clear default** when you want new tenders to start blank again. It is a setting for the whole company and it does not change tenders that already exist. SmarteBuild's own templates cannot be the default — save your own copy of one first.

Set up a template per trade. Each new job then means selecting the items and sending, rather than rewriting the same email for the twelfth time.

21.4 Inviting subcontractors

Choosing who to invite, how many to ask, and why the supplier records you keep determine how easy this is.

Recipients come from your **Suppliers** list. Each one invited gets their own **bid** — their copy of the package to price.



The invitation carries the package, the drawings and a link to quote.

How many to invite

Three is the usual answer for anything significant.

Invited	You get
One	A price, not a market price
Two	A comparison, until one declines
Three	A real range, and cover if one drops out
Six or more	Diminishing returns, and a reputation for wasting people's time

The last row is worth taking seriously. Subcontractors talk to each other, and one who works out they are the sixth quote on every job you send stops pricing your work. Invite people you would actually use.

Choosing who

Press **Invite a subcontractor** on the tender's Subcontractors tab. Choose the supplier list, then narrow it with **Trade** — type to find the trade, the same way cost codes are found. Pick the business, then the contact, and press **Invite**.

The dialog stays open after each invite, with a line listing who you have invited so far, so you can go straight on to the next plumber. Press **Done** when you have them all.

Only contacts with an email address are offered — a contact without one could never be sent the tender — and contacts already on the tender are marked **already invited**. If the supplier's licence or insurance has expired, or is about to, the warning appears as soon as you pick them.

A trade shows the suppliers filed under exactly that trade. If a list looks empty, try the trade above it, or **All trades in this list**.

Contact on each recipient is the person the invitation goes to.

Send to a named person. A tender addressed to `info@` competes with everything else in a shared mailbox; one addressed to the estimator who priced your last three jobs gets looked at.

This is where your supplier records pay off

Suppliers carry their **trades**, so the module can offer the businesses who do the work in this package rather than your whole list.

If choosing recipients means scrolling through 400 suppliers, the trades on those records are not filled in. Fifteen minutes tidying that up is repaid on every tender after it. See Suppliers.

The record's **ratings** and **dated fields** (licence, insurance, Work Cover) pay off later too: the tender list shows a supplier's average rating under their name, and flags a field that has expired or is about to, right where you compare their price.

Give them enough time

The single biggest influence on the quality of a bid.

Package	Reasonable notice
A small trade on a house	3–5 days
A major trade on a house	1–2 weeks
A commercial package	2–4 weeks

A subcontractor given two days either declines, or prices high to cover what they did not have time to check. Neither helps you.

> **Say when the work is programmed** — Not just when the price is due. A subcontractor who knows the work is in March can tell you whether they are available, and prices for their March rates. One who is not told often assumes the worst on both counts.

Adding a supplier mid-tender

If the business you want is not in your list, add them — the supplier record is needed for the bid to exist, and you will want it next time anyway.

Fill in the trades while you are there.

Changing or removing an invitation

Edit on their row changes the contact — until the tender has been sent to them. After that, invite the new contact instead: the first one has the email.

Remove takes them off the tender, but not once they have quoted, because their quote belongs to the invitation. Mark them **Not interested** instead.

Declines

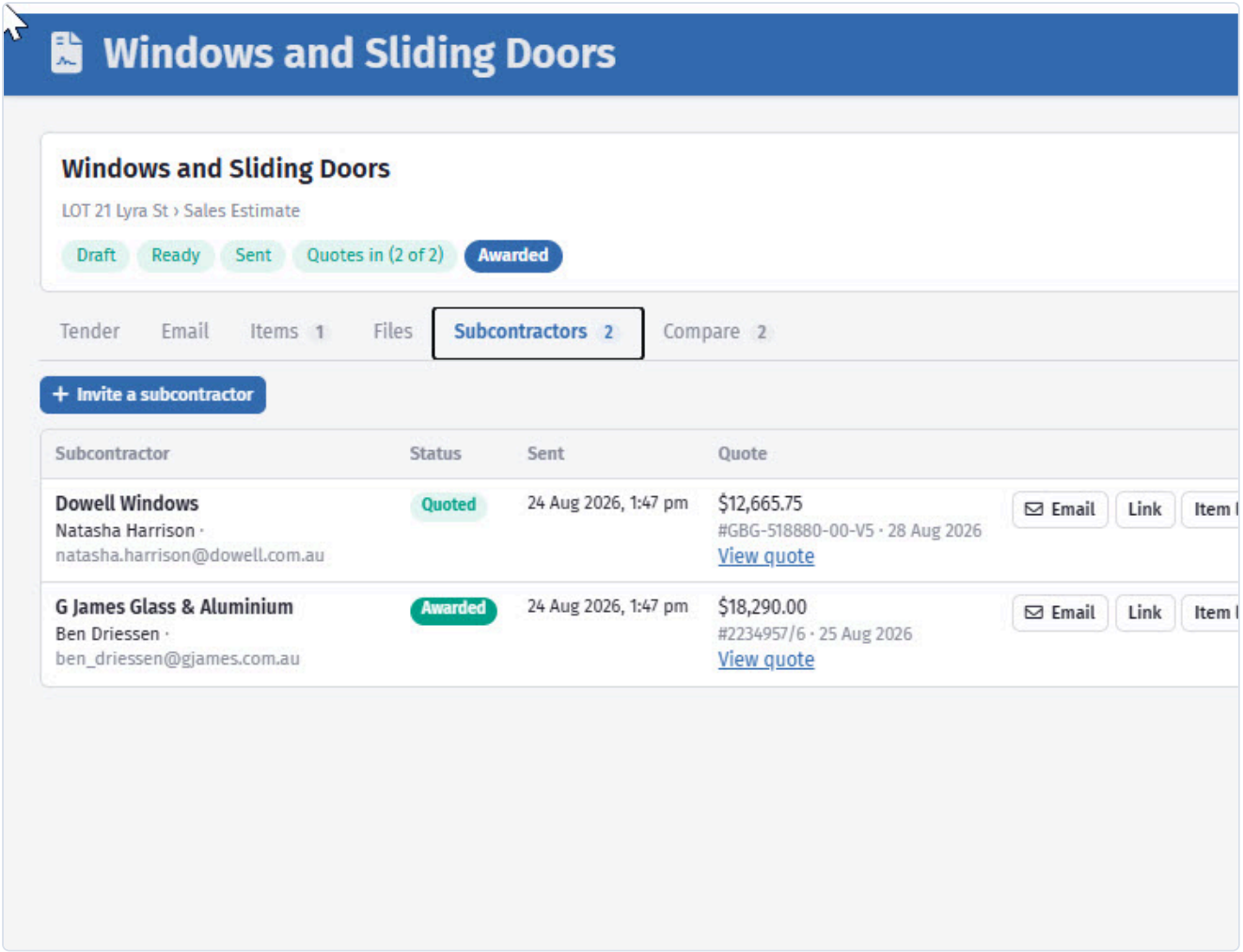
A subcontractor who declines is useful information: press **Not interested** on their row to record it, so next time you know to invite four. They also drop off the "still waiting on" line under Compare.

A subcontractor who never responds at all is different, and worth chasing rather than assuming. Silence is usually an invitation that went to a mailbox nobody reads — which is a contact detail to fix, not a business to write off.

21.5 Sending and tracking

Sending invitations, following up, handling questions that affect everyone, and knowing where every bid stands.

Sending is one action; tracking is the part that determines whether you get three comparable prices or one late one.



Sent is not quoted, and this is where the difference shows.

Sending

Each subcontractor is sent their own email from the **Subcontractors** tab: press **Email & send** on their row. The email opens as they will see it — the placeholders filled in with their name and your project, and the attachments listed underneath — so you can check it before it goes.

Nothing can be sent until the tender is ticked **Ready to send** on the Tender tab. That is deliberate: it stops a half-built package going out by accident.

After **Send**, the page watches for the email to go and then shows **Sent**, or **Send failed** with the reason the mail server gave — usually a mistyped or full mailbox. You can close the email while it sends; the send carries on. **Send again** delivers another copy.

Replies come to you. When the tender goes out from SmarteBuild's tenders mailbox, a subcontractor who presses plain **Reply** — not Reply All — reaches whoever sent the tender, and whoever created it if that is someone else. Both are copied on the email as well. The email shows who under **Replies go to**. Sent from your own address, replies come to you as they always have.

An email can be changed until it is sent: **Edit this email**, or **Use the tender's email** to start again from the tender's version. Once sent, it stays as the record of what they received.

Each recipient gets their own bid, so each sees only their own invitation. Use `;` between addresses in **CC** and **BCC** where you are copying more than one person at a supplier.

BCC yourself. It gives you a timestamped copy outside SmarteBuild, which is occasionally what settles "we never received it".

Every invitation carries the subcontractor's own quote link. It is added to the end of your message automatically, or you can place it yourself by typing `$QuoteLink$`. It opens a page where they price your items and attach their own quote, with no login - see What subcontractors see.

Link on their row copies that link, for the phone call where they cannot find the email — paste it into a text message.

Tracking

The Subcontractors tab shows each one and where they stand:

Status	Means
Not sent	Invited, but the email has not gone
Sending...	The email is on its way
Sent	Delivered to the mail server; the date is in the Sent column
Send failed	The reason is shown underneath. Fix it and send again
Quoted	A quote has come back — its amount, number and date are shown
Not interested	You recorded that they will not price it
Awarded	Their quote was selected on Compare

Priced online with a date appears under the status when they used their quote link. If they quoted more than once, **2 quotes** opens the history; the newest is the one compared.

Across the top of the tender, a progress line reads **Draft → Ready → Sent → Quotes in (2 of 3) → Awarded**, so you can tell where a tender is without opening a tab.

Watch two things:

Nobody has responded and the deadline is close. Usually the invitation went to a mailbox nobody reads. Ring, do not send a second email.

Only one has responded. You have a price, not a comparison. Better to extend the deadline for everyone than to award on a single bid.

Following up

A simple sequence:

When	Do
Two days after sending	Confirm receipt, by phone if there has been no acknowledgement
Halfway to the deadline	Ask whether they are pricing it and whether anything is unclear
Two days before	Remind, and ask if they need longer
Deadline	Chase anything outstanding

Follow up on a subcontractor's row in the tender list sends the reminder for you, with the files attached again, and notes that it went. The wording can be loaded from one of your templates or saved as one, **What they'll see** shows it filled in for that person before it goes, and **Send me a copy** keeps one in your inbox.

The halfway call is the valuable one. It surfaces the questions a subcontractor was going to ask on the last afternoon, and it tells you early if they have decided not to price — while you can still invite someone else.

Questions that affect everyone

If one subcontractor asks something that changes how the work is priced, **tell all of them**.

Two reasons. The bids stay comparable, because everyone priced the same understanding. And the subcontractor who asked the good question is not penalised for it — which is how you stay someone people ask questions of.

Send update on the tender's header in the tender list does exactly that: one email to everyone already sent the tender, with only the files you tick, and a note on every row that it went.

> **An unshared clarification produces bids you cannot compare** — If one bidder was told the slab is post-tensioned and the others were not, the prices are not comparable and the cheapest is probably the one who did not know. That is discovered on site.

Extending a deadline

Extend for everybody, and say so. A deadline quietly extended for one bidder is unfair, and it gets back to the others.

Re-issued drawings mid-tender

If the drawings change while a tender is out, **Send update** with the new revision uploaded and ticked, and a clear note of what changed and whether the deadline has moved. The revision is attached to the tender as well, so anyone invited later gets it.

Do not assume a subcontractor will notice a revision letter. Say what changed.

When bids come back

Prices arrive as bids against the tender, and can be brought into the bill from there — carrying a **Related bid** link back to the source. See Comparing bids and awarding.

21.6 What subcontractors see

The page your subcontractors use to price a tender, what it asks them for, and how to help them use it.

Every invitation email carries the subcontractor's own link to a quote page. They do not need a SmarteBuild login, and they do not see your other bidders or your prices.

Knowing what they see makes it much easier to help them when they ring.

The link

The link sits at the end of your invitation, under **Price this tender online - no login needed**. Each subcontractor's link is their own: it opens their invitation and nobody else's, so forwarding it never shows anyone your other bids.

To put the link somewhere else in your message, type `$QuoteLink$` where you want it. If your message already has it, it is not added a second time.

The same link works on a phone: the page is built to be priced on site if that is where they are.

What the page shows them

It reads like a letter from you, top to bottom:

They see	Which is
The heading	Your company name, the tender's name, the project and its address, when it was sent, and where they are up to — *Awaiting your price*, *Saved, not sent*, *Quote sent*, *Not pricing*, *Accepted*
Who is asking	Your company and the name, email and phone of whoever sent the tender — as links they can tap
The job	Project name, job code, site address and the package name
Notes from you	The tender's notes, and anything you wrote on their invitation, marked *For you*
Documents to price from	Every file attached to the tender, to open in the browser or download. A superseded version is shown struck through
Your price	Every item on the tender — name, description, product and your note on the line — with a quantity and a price box each, and the totals ex GST, GST and inc GST
Your own quote and documents	Where they attach their quote on their letterhead

They do not see who else was invited, what anyone else has quoted, your budget, or anything about the rest of your job.

What they fill in

Field	What it is
Quote name	Starts as your tender's name; they can change it
Your quote number	Their own reference, optional
Quote date	The date of their price - today unless they change it
Qty	Filled in with your quantity (when the tender shows quantities). If they change it, your figure stays beside it as *Builder's qty* so both of you can see the difference
Price each (ex GST)	Their unit price. A blank box means *not pricing this item*; 0 means *included in another line*. Simple sums are allowed — `26*88` becomes 2,288

The bar at the bottom keeps a running total and counts the items priced. **Save for later** keeps their prices on the page without sending them — you cannot see them yet. **Submit quote** sends them: the price arrives against your tender straight away, and a note *Quote submitted online* appears on their row in the tender list.

After they submit

The page tells them the quote was sent, and when. Their prices lock. From there they can:

- **Change my quote** — unlock the prices and change them. Submitting again updates the same quote; it never creates a second one.
- **Attach a file** at any time, before or after submitting. The first file becomes their quote document (the PDF button on their row); **This is my quote** moves that to another file. A subcontractor who only wants to send you a document can: attach it and submit with the items blank.

Once you **accept** their quote (award it), the page says so and locks for good — their prices are now part of your estimate, so a change would have to come through you. It tells them to contact you.

If you put the tender in the trash, their link shows *This tender has been withdrawn* and takes nothing.

Not interested

Not pricing this one? at the bottom of the page lets them decline, with an optional reason — *too busy this month*, *not our type of work*. You see it on their row as a note, *Declined online: …*, and they drop out of the counts. They can change their mind with **I'll price it after all**; the items reopen.

Two ways they can price

Against your items. This is the one you want - it comes back line by line against your bill, and comparison is mechanical.

As their own document. Perfectly valid, and what many subcontractors do regardless. They attach it and submit with the items blank; you will see the empty lines flagged when you compare, and Read quote on their row can read the document into lines for you.

Most will do both if you ask - price your items and attach their own quote as well. That is the ideal outcome: comparable numbers, plus their conditions.

Helping them through it

The calls you will get, and the answers:

"I cannot find the link." It is at the bottom of the invitation email. Press **Link** on their row in the tender list to copy it and text it to them, or **Follow up** to send it again.

"Can I just email you a price?" Yes, and record it in Quotes Received - but ask them to use the page if they can, because it keeps the trail on the job.

"There is an item I do not do." Tell them to leave it blank and note it in their own quote. Better an honest gap you can see than a guessed price you cannot.

"Your quantities look wrong." Ask which item and check it. Either you have found an error in your bill before it went into a tender price, or they have misread the drawing - both are worth knowing now.

"The link says it is no longer valid." The invitation was removed or the tender is in the trash. Restore it, or invite them again.

> **See it the way they do** — Add yourself as a contact on a test tender, send it, and open the link in the email. That is exactly what your subcontractors get.

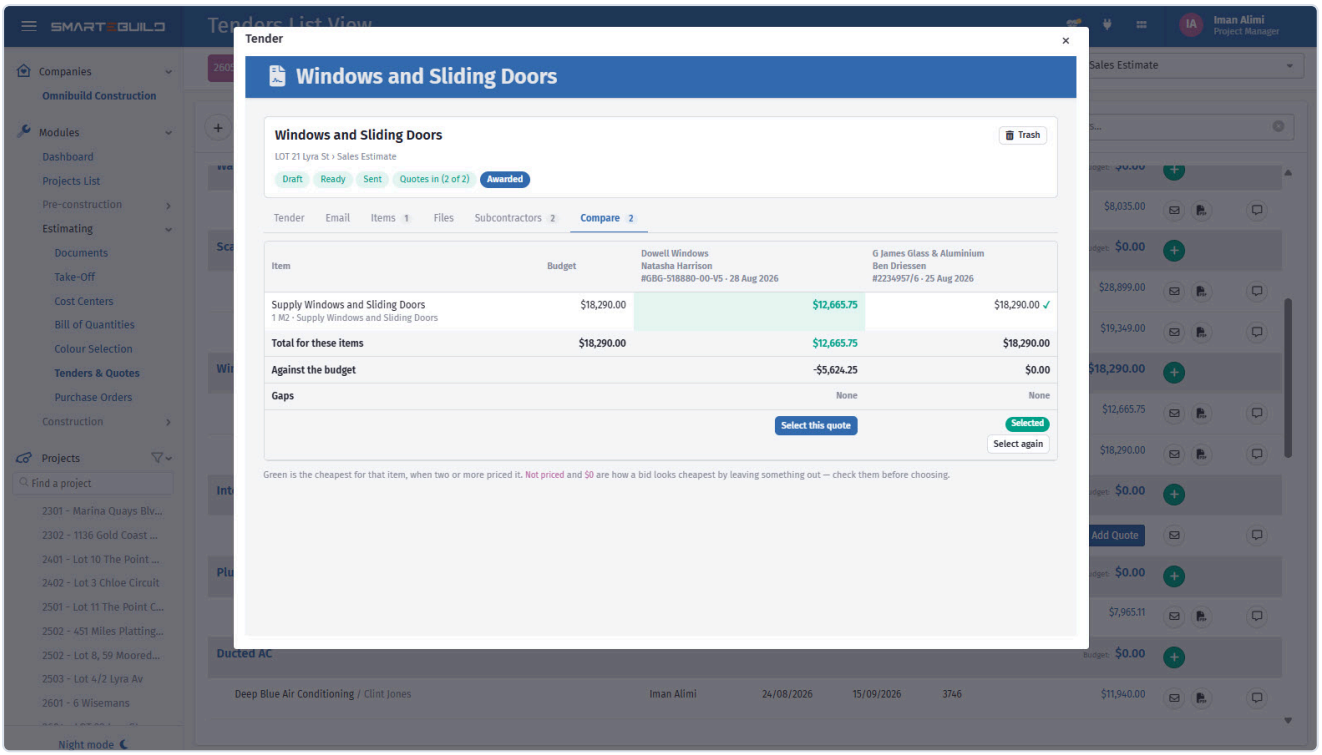
When it arrives

The bid lands against your tender with their prices, their document and their details attached - ready to compare. See Comparing bids and awarding.

21.7 Comparing bids and awarding

Reading bids side by side, checking they cover the same scope, bringing the winning price into the bill, and what to tell the ones who missed out.

Quotes come back against the tender and line up on its **Compare** tab. The work is making sure they are actually comparable before you decide anything.



Compare like for like before you award anything.

Reading the Compare tab

Compare puts your items down the side and each subcontractor across the top. Each cell is **their price for that item** — their quantity times their rate — so you can see who is cheapest item by item, not just in total.

You see	It means
A **green** cell	The cheapest price for that item, when two or more subcontractors priced it
Not priced	They left the item out of their quote
$0.00, in pink	They put the line in but priced it at nothing
for 30 under a price	They priced a different quantity from yours

Under the sheet:

- **Total for these items** — what each quote comes to for the items on this tender
- **Against the budget** — the difference from your estimate
- **Gaps** — how many items they did not price, or priced at zero
- **Whole quote** — shown when it differs, because they also priced things that are not on your tender

A total is only marked as the lowest when the subcontractor priced every item. A total with gaps is not a total.

Only each subcontractor's **latest** quote is compared. If they sent more than one, the earlier ones are on the Subcontractors tab under **2 quotes**.

The cheapest is not always the cheapest

Before comparing totals, check each bid covers the same work.

Check	Why
Every item priced?	A gap makes a bid look cheap
Exclusions?	Read their document, not just the total
Quantities as sent?	A bidder who re-measured may have found something
Conditions?	Payment terms, retention, insurance, minimum call-outs
Prelims and access?	Scaffold, hoisting, cleaning — who is allowing for it

The lowest bid is often the one that excluded the most. That is not dishonesty, usually — it is a subcontractor pricing exactly what they read.

Worked example

Three bids for the Hendricks roofing package:

Bidder	Total	Notes
A	$17,240	All items priced. Excludes scaffold.
B	$18,600	All items priced. Includes scaffold.
C	$16,900	Sarking not priced. Excludes scaffold and edge protection.

C looks cheapest and is not. Add sarking at around $1,400 and C is $18,300 — and still excludes edge protection.

Scaffold is $1,900 if you supply it. So the real comparison is:

Bidder	Comparable total
A	$19,140
B	$18,600
C	$20,200+

B, which looked the most expensive, is the cheapest — and is the only bid where nobody has to work out who is bringing the scaffold.

> **Normalise the scope before comparing totals** — Ten minutes with the three bids and a pad is worth more than any other ten minutes in the estimating process. The difference above is $1,600 on one trade, and it points the opposite way to the headline numbers.

Bringing the winning price into the bill

Once you have chosen, press **Select this quote** under that subcontractor's column on Compare, or **Award** on their row in the tender list. For every item they priced, their quantity, their product and their

quoted price go into your estimate, replacing what was there. (From the list you can also award without touching the estimate.)

Anyone else selected on those items is cleared at the same time, so the estimate and the tender always agree on who won each item. The winner's column shows **Selected**, and the tender's progress line moves to **Awarded**.

> **Check before you award - and know what Undo can put back** — Selecting a quote overwrites the estimate's quantities and products for those items. Check the sheet — gaps, zero prices, different quantities — before you press it.
>
> If you award the wrong quote, **Undo award** on that row of the tender list (or on the quote itself) puts back what was there before: which quotes were chosen, and each estimate item's quantity, product and price. It works on the **latest** award on the estimate — undo the newer one first. An item someone has edited since the award is left as it is and counted in the message, and orders already raised are not touched.

The items pick up the quoted rates and carry a **Related bid** link back to the source. The winner's own quote page changes too: it shows **Accepted** and locks, so they cannot change a price that is now in your estimate — it tells them to contact you instead.

That link is what answers "who quoted this and when?" six months later, without anyone opening a mailbox. It also means the purchase order you eventually raise carries the rate that was actually quoted.

While you are there, set the **supplier** on the items to the winning bidder. It takes a moment now and saves assigning them by hand at ordering. See Suppliers and products.

Telling the others

Tell the unsuccessful bidders, briefly and promptly.

It costs a short email and it is the reason they price your next job. A subcontractor who prices three of your packages and never hears back on any of them stops answering.

You do not have to give them the numbers. "Thanks for pricing this — we have gone with another contractor this time, but I will have the next one out to you" is enough.

Keeping the record

The tender keeps who was invited, what they were sent, when, and what came back.

That is what you want when a subcontractor says the scope was different from what they priced — the package they were sent is attached to the job, not reconstructed from memory.

If no bid is acceptable

You can re-tender. Before you do, work out why: too little time, the wrong bidders, an unclear package, or a genuinely expensive piece of work.

Re-tendering the same package to the same people with the same information gets the same answer.

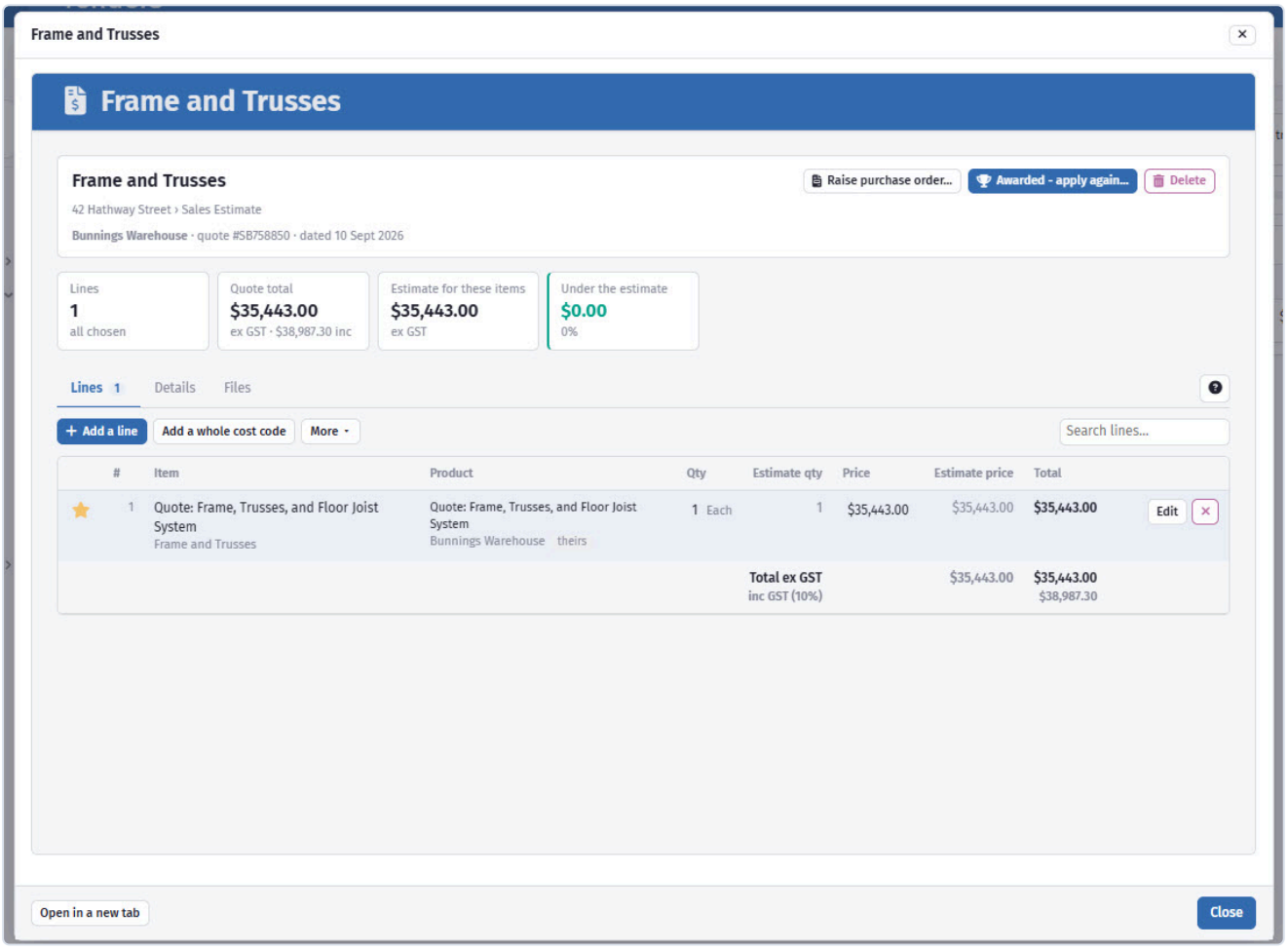
CHAPTER 22

Quotes received

22.1 Recording a quote

Capturing a price that arrived outside a tender, so it is attached to the job rather than sitting in a mailbox.

Not every price comes through a tender. Someone emails a quote, rings with a number, or hands you a page on site. **Quotes Received** is where those go.



Record the quote against the job so the number has a source.

The quote window

A quote opens on its **Lines**. Across the top sit the numbers the old page left you to work out: how many lines there are and how many are chosen, the **quote total ex and inc GST**, what **the estimate has for the same items**, and how far over or under the estimate the quote is.

Details holds the name, the supplier's quote number and date, and who it is from. **Files** holds their documents.

The details

Field	What it is
Name	What the quote covers
Their quote number	Their reference
Quote date	The date on their document
Answers the tender invitation	Links it to a tender you ran. The supplier then comes from the invitation
Supplier	For a quote on its own — search the supplier list by name

A quote with no supplier can still be recorded, but nothing can be made in their name: set the supplier before adding products from the quote.

The lines

Each line is one of the estimate's items with what the supplier quoted for it. The estimate's own **quantity** and **price** sit beside the quoted ones, and a quantity that does not match — or a price more than 10% over the estimate's — is marked. **Only the ones to check** narrows the list to those.

- **Add a line** — choose the cost code (type to search), then the item under it, then the product. The quantity starts at the estimate's.
- **Add a whole cost code** — every item under it at the estimate's quantity, priced at zero, ready for you to type their prices in. Items already on the quote are skipped.
- **Change a quantity or price in the row** — click it, type, press Enter. A sum like `=2400/26` works, so a lump sum per item can be typed as it is written on their quote.
- **Price includes GST** — tick it in the line window when you type a GST-inclusive figure. Prices are stored ex GST, at the job's own GST rate.
- **Comment** — kept on the quote line, for example what they excluded.

More has the bulk actions: choose or unchoose every line, match the quantities to the estimate (their prices are kept), match everything to the estimate (their prices are overwritten — it asks first), remove the zero-value lines, and remove every line.

Choosing lines

The **star** on a line makes this quote the chosen price for that item. An item has one chosen price across all its quotes, so choosing a line clears any other quote's choice for the same item — a line says **another quote is chosen** when that is the case.

Awarding the whole quote

Award this quote chooses every line at once. Tick **Update the estimate items too** to write the quoted quantities, this supplier's products and their prices into the estimate — the same Award as on the tender list.

Once awarded, a green line under the quote's name says when and by whom. **Undo award** on it puts back the choices and the estimate figures from before - for the latest award on the estimate, and never over an item someone has edited since.

Is it the cheapest?

Where another quote prices the same item, the price column says so: **Lowest** when this quote is the cheapest, or the other supplier's name and price when it is not. Older versions of a subcontractor's quote are not counted - only their current one.

Raising a purchase order from the quote

Raise purchase order makes an order to the quote's supplier with the quote's items, products, quantities and quoted prices, linked back to the quote. Choose **only the chosen lines** (after an award, that is the lot) or **every line**. The order is made unapproved and unsent and opens in a new tab, where it is checked, approved and sent as usual. Orders raised from the quote are listed under its name.

It needs the *Create orders* permission and a supplier on the quote.

Attach the document

Always. The attached PDF is what settles a scope disagreement, and it carries the subcontractor's own conditions and exclusions — which the typed price does not.

A quote recorded as a number with no document is a number nobody can check.

> **Record phone quotes the same day, and confirm them** — A price given over the phone is worth recording, but send a short email back — *"just confirming $4,200 for the tiling as discussed"* — and attach that. It converts a conversation into a record, and it catches misheard numbers while they are still fixable.

Let the document be read for you

Read quote (AI) at the top of the quote takes the supplier's PDF or photo and reads its lines for you to check before anything is recorded. It works for any quote, including one that arrived by email with no tender behind it:

- A quote that answers a tender is matched to **the tender's items**.
- A quote on its own is matched to **the estimate's items**. A line nothing matches can be pointed at another item, or made a new item under a cost code.

The document is attached to the quote as soon as it is uploaded. **Add** puts the lines after the quote's own, or tick **Replace the lines already on this quote** to swap them. Their quote number and date are filled in from the document.

On the tender list, **Read quote** on a subcontractor's row does the same and creates the quote - see Reading a quote with AI. It needs AI features switched on for your company, and each read counts against the monthly AI allowance.

Linking it to a tender

Where the quote does relate to a tender you ran — a revised price, a late bid, a subcontractor who preferred to reply by email — link it.

That keeps everything about the package in one place, and preserves the trail back from a rate in the bill to the source of the price.

Making a product from the quote

In the line window, the product list offers **Make a new product for** the supplier. That captures the specific product quoted, with its supplier and part number, so it can be used on the item.

Worth doing where the quote is for a specific product rather than labour. It means the eventual purchase order carries the part number, which is what prevents substitutions. See Suppliers and products.

Changing the price later. Change it in the row or in the line window: the product made from the quote takes the new price as well, and the page says so. This only happens when the product belongs to the quote's supplier — a line pointing at another supplier's product changes the line only, because this quote is not that supplier's price.

When to use this rather than a tender

A lump sum still needs recording, or the estimate has nothing behind it.

Situation	Use
Comparing several subcontractors on real work	**Tender**
A single supplier's price for a product	**Quote received**
A late or revised price against a tender you ran	**Quote received**, linked to the bid
A price you were given informally	**Quote received**
Anything significant you want comparable	**Tender**

If you find yourself recording three separate quotes for the same work, that work should have been a tender — you have done the same job with none of the structure.

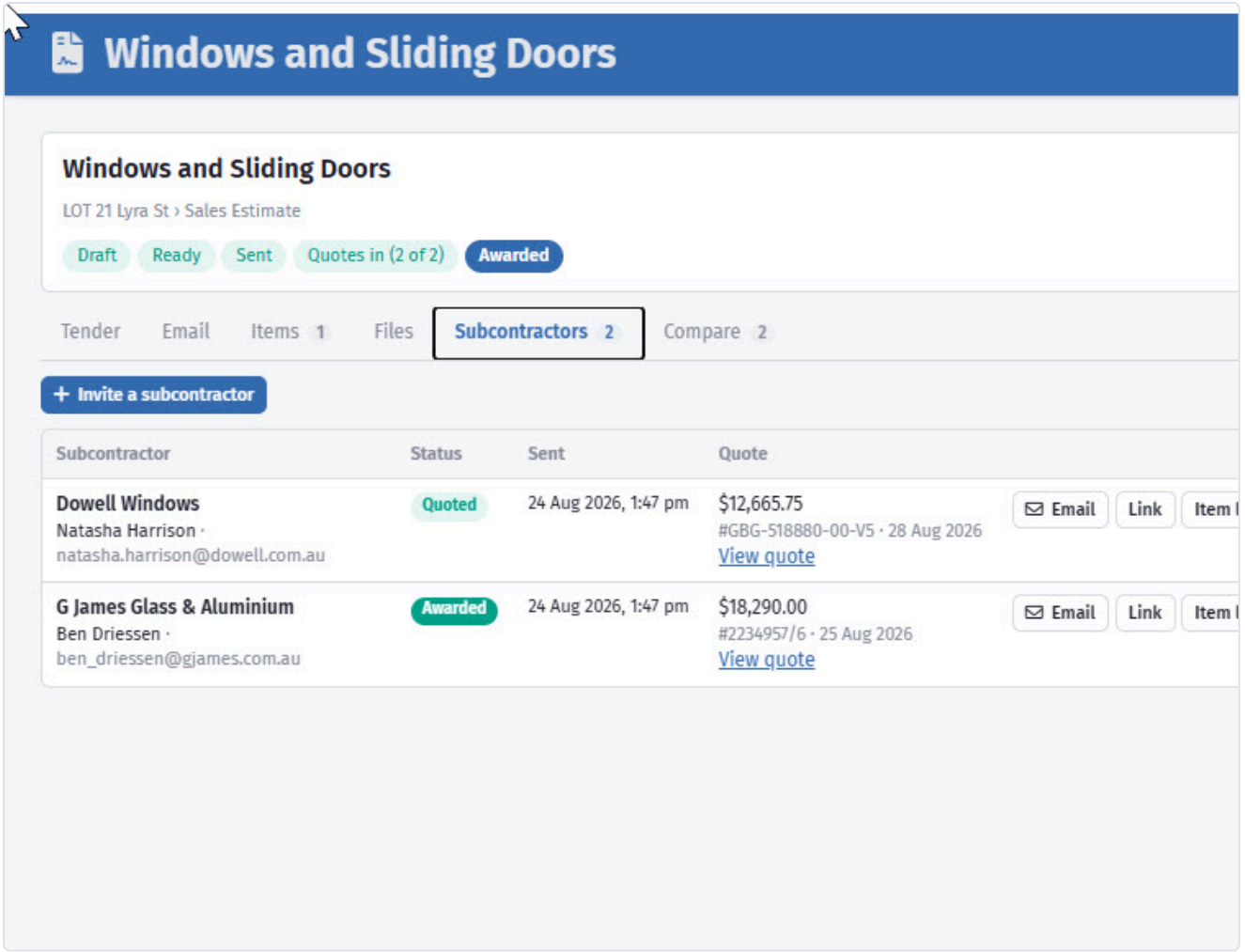
What happens next

The quote can be brought into the bill against items — see Bringing a quote into the BOQ.

22.2 Bringing a quote into the BOQ

Getting a received price onto your items, keeping the link back to its source, and handling lump sums.

A recorded quote is only useful once it is priced into the bill. This is how it gets there, and what to keep hold of on the way.



Push a quote into the bill and the rate lands on the items it covers.

Against items

Where the quote prices your items, apply it to them directly. On the quote, **Award this quote** with **Update the estimate items too** ticked: each item takes the quoted quantity, the supplier's product and the quoted rate, and keeps a **Related bid** link back to the quote. To take only some lines, open each one and tick **Also put this product and quantity on the estimate item**, and star it so it is the chosen price - see Choosing lines.

Set the **supplier** on those items at the same time. It takes a moment and it means the purchase order later assembles itself.

Lump sums

Most subcontractor quotes are one number for the whole scope. You have two options.

Carry it as a single item. Add one BOQ item for the trade, with the quoted total and unit `item` or `sum`. Simple, and right when you will order and pay it as one lump.

Put the scope in **Includes** — the vanity, the mirror, the screen, and what is excluded. `Bathroom fitout — $8,500` tells nobody anything a month later.

Spread it across items. Where you want detail — to compare against another job, or because you will order parts of it separately — allocate the lump across your items.

The trade-off is honesty about precision. Splitting a $17,000 roofing quote across six items means inventing six rates that add to $17,000, and none of them is what the subcontractor actually quoted. Fine for reporting; misleading if someone later treats one of those rates as a real price.

> **Lump sum in, lump sum out** — If you will order and pay it as one lump, carry it as one item. The detail you gain from splitting is invented, and it will be treated as real by whoever reads it next.

Keep the link

However you bring it in, keep the quote attached and the **Related bid** link intact.

It is what answers three questions later:

- Who quoted this?
- What were their exclusions?
- Is the rate on this item a real quoted price, or my own allowance?

That third one matters when the job is won and you are raising orders. A rate that came from a quote can be ordered against with confidence; one you allowed yourself needs checking first.

Quotes that arrive after you have priced

Common — you allow a rate, submit the tender, and the subcontractor's price arrives afterwards.

Record it, and compare it against what you allowed:

Quote vs allowance	What it means
Lower	Margin you did not know you had
About the same	Your allowance was sound
Higher	You are short on that trade — and now, not on site

Do not silently overwrite the allowance on an estimate you have already submitted. That changes what your tender says the job costs. If you want to see the effect, duplicate the estimate and update the copy.

Expiry

Quotes expire. Where the price carries a validity period, note it — in the quote name, or on the item.

A price accepted four months after it was quoted is not a price, and finding that out when the order is rejected is worse than finding it out now.

PART V

Running the job

Commitments, money in and out, the programme, and the record of what happened.

23 Running the job
24 Purchase orders
25 Variations
26 Progress claims
27 Expenses
28 Colour selection
29 Schedule and booking
30 Site diary
31 Timesheets
32 Earned value
33 Checklists and safety
34 Defects
35 Messages
36 The client portal

CHAPTER 23

Running the job

Purchase orders, variations, progress claims, expenses and the schedule - everything that happens after you win the work.

Everything in this section happens after the job is won. It is what the Builder plan adds, and it all reads from the estimate you already built.

The money, in a loop

Four modules track the money, and they connect in one direction:

The BOQ says what you allowed. → Purchase Orders commit it. → Expenses record what you were actually charged. → Progress Claims bring money in.

Variations sit across all of it, because a change to the job changes what you allowed, what you commit, what you spend and what you can claim.

Module	Answers
Purchase Orders	What have I committed to spend?
Expenses	What have I actually been charged?
Progress Claims	What have I invoiced the client for?
Variations	What has changed since the contract?
Schedule & Booking	When does it all happen, and who is coming?

Why orders come first

The temptation on a busy job is to skip orders and just record invoices as they arrive. It works, briefly, and then stops working — because without orders you find out you have overspent when the invoice lands rather than when you commit.

An order raised from the BOQ compares itself against what you allowed at the moment you commit. That is the only point in the process where the information is still useful.

Everything is raised against BOQ items

Orders, claims and variations all point back at Bill of Quantities items. That is what makes the numbers reconcile — and it is why the cost code structure you set up while estimating matters so much here.

If you have not read The Bill of Quantities explained, it is worth ten minutes before this section.

In this section

- **Purchase Orders** — committing cost to suppliers and subcontractors
- **Variations** — changes to the contract

- **Progress Claims** — getting paid
- **Expenses** — supplier invoices against what you committed
- **Colour Selection** — recording what the client chooses
- **Schedule & Booking** — tasks, the Gantt, call-ups, bookings and cash flow
- **Site Diary** — the daily record: weather, who was on site, deliveries, visitors, issues and photos
- **Timesheets** — your people's hours, approved in the office and costed onto the job
- **Earned Value** — is the job ahead or behind, under or over: estimate, schedule and invoices side by side, with a forecast of the final cost
- **Checklists & Safety** — inspections, sign-ons, handover checks and the incident register
- **Defects** — the punch list, through to handover
- **Messages** — the team's chat, one conversation per job, with photos, files and phone notifications (replaces Feeds)
- **Client Portal** — one private page per client: shared documents, selections, variations to approve, claims, photos and a message thread

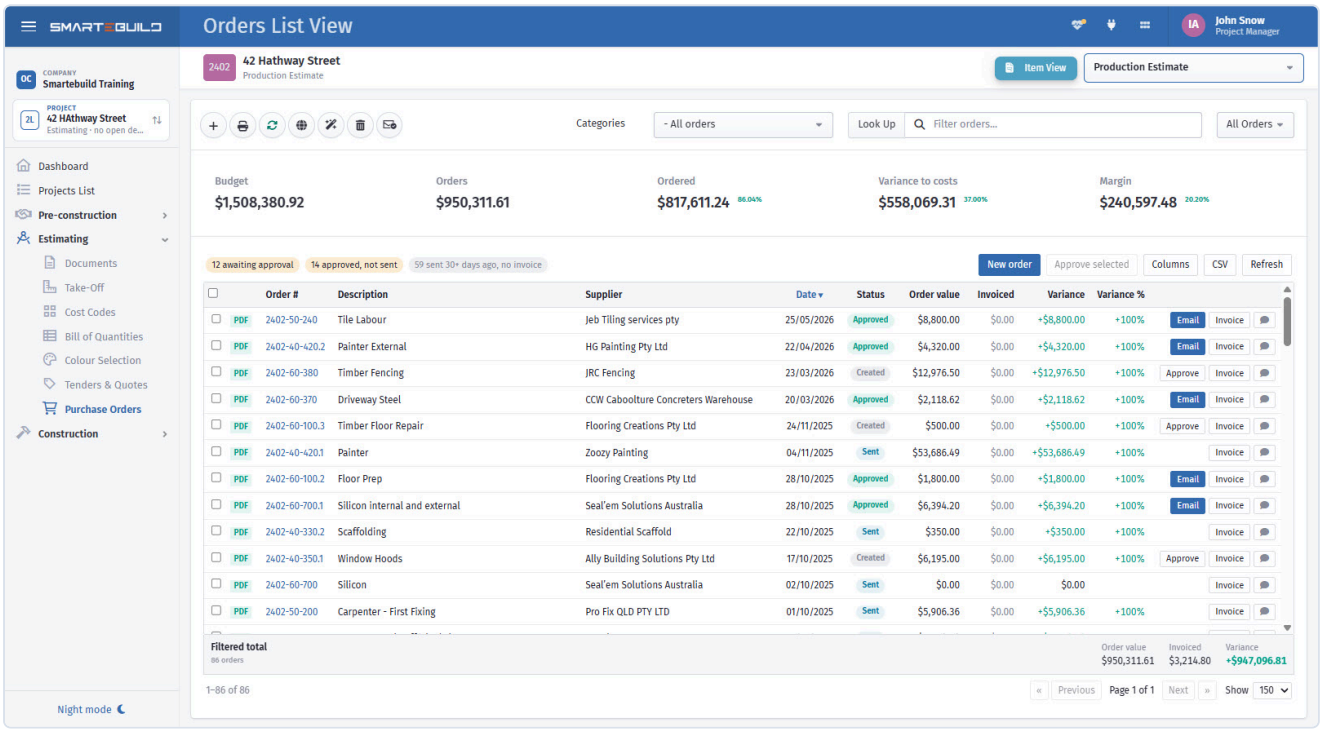
CHAPTER 24

Purchase orders

24.1 How purchase orders work BUILDER PLAN

What an order is for, the life of an order from raising to billing, and why raising them from the BOQ is the whole point.

A purchase order commits money to a supplier or subcontractor. It tells them what you want, at what price, delivered where — and it tells you what you have spent before the invoice arrives.



Orders turn the estimate into commitments you can track.

Why raise orders at all

Because the alternative is finding out you have overspent when the bill lands.

An order raised from the BOQ compares what you are about to commit against what you allowed, at the moment you commit it. That is the only point where the information can still change what you do. Once the invoice is in, the money is gone.

Orders also give you the three numbers that tell you how a job is going:

Number	Comes from	Means
Allowed	The BOQ	What you priced
Committed	Purchase orders	What you have promised to pay
Actual	Expenses	What you have been charged

The life of an order

1. **Raise it** from BOQ items — see Raising an order.
2. **Approve it**, if your process requires it.
3. **Send it** to the supplier.
4. **Receive an invoice** against it, recorded in Expenses.
5. **Generate Invoice** creates the expense record directly from the order.

Along the way it can be **duplicated**, **exported**, or **voided** if the work is no longer going ahead.

Orders come from the estimate

An order is built from BOQ items, which is what makes all of this work. The item carries the description, the quantity, the rate, the supplier and the part number, so the order writes itself.

This is why the supplier fields on your items matter. Items with a supplier attached collect into an order for that supplier automatically. Items without one have to be assigned by hand, on every job. See Suppliers and products.

Locking

With **Lock Ordered or Billed Items** on in the BOQ, an item that has been ordered against cannot be quietly edited.

That is deliberate. Changing the quantity on an item you have already ordered breaks the relationship between allowed and committed without telling anyone. If the scope really has changed, the order needs revising too — which is the conversation the lock forces.

Xero

Orders can be exported to Xero, individually or as part of your normal flow. **Export order to Xero** appears on the order itself, and requires the Xero connection to have been set up under **Integrations** in the top bar.

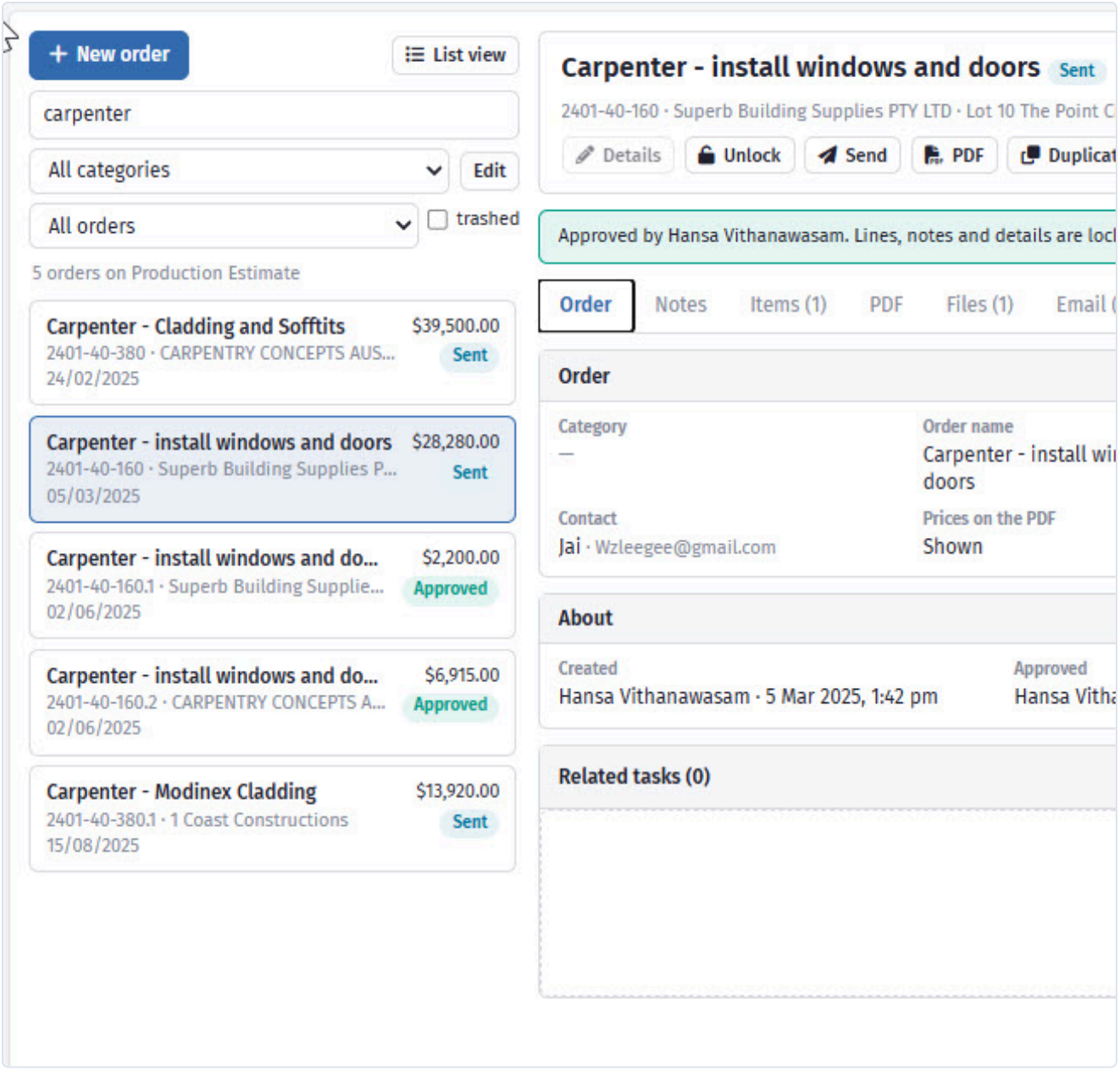
In this section

- Raising an order
- Order details
- Sending an order
- Voiding, trashing and deleting
- Committed vs actual cost
- The orders list

24.2 Raising an order BUILDER PLAN

Creating a purchase order from Bill of Quantities items, with a worked example, plus templates and duplicating.

Orders are built from BOQ items. Choose **New** on the Orders screen, pick the estimate, and select the items the order covers.



Items priced with a supplier attached split into one order each.

The process

1. **Choose the estimate.** Orders belong to one priced version of the job.
2. **Choose the supplier.** Type in the **Supplier** box to filter, rather than scrolling a long list; it holds every supplier on the chosen **Supplier list**. Items already carrying that supplier are offered first.
3. **Select the items.** Each brings its description, quantity, rate and part number with it.
4. **Adjust quantities** if you are ordering part of an item — a first pour rather than all the concrete, say.
5. **Add the order-level details** — dates, contact, notes. See Order details.
6. **Approve** and **send**.

Raising orders from the BOQ

Select items on the **BOQ** and choose **Order**. If the items come from more than one supplier, SmarteBuild raises **one order per supplier**, each carrying only that supplier's items, instead of one mixed order you would have to split by hand.

- **Whose item is it?** The supplier of the product the order will use: the product on the latest accepted variation for that item, otherwise the item's selected product.
- **Items with no supplier product** go together on one order of their own, with no supplier set, so you can choose one before sending.
- **Names and numbers.** Each order is named after what you typed plus the supplier - *Slab - Barwon Concrete* - and numbered from the number you typed: `SMI-01-SLB`, `SMI-01-SLB.1`, `SMI-01-SLB.2`.
- **Switched-off items are ordered only if you tick them.** An item that is not included is carried in the estimate without being counted, but that is an estimating choice, not a bar on buying it: tick it and it goes on the order. With nothing ticked - where **Order** takes everything on screen - switched-off items are left off, and the message says how many.
- **Choosing a supplier in the dialog keeps everything on one order** for that supplier. Leave the supplier blank to split.

When several orders are raised, the page lists them all and opens the first.

Finding items by cost code

In **Add an item**, the **Cost code** box narrows the list of items. Type to search the tree — "kitchen tap" finds *Fitout › Kitchen › Tapware*. Choose a heading (shown in bold) to see every item under it, or a single cost code to see just its items.

Whatever you choose there, the line is filed under the item's own cost code, so an order line is never costed against a heading. A one-off line with no item behind it takes the cost code you chose, or none if you chose a heading.

Import items from a cost code adds every included item under one cost code in a single step. It needs a cost code rather than a heading: if you pick a heading, it asks you to choose a cost code under it.

Ordering part of an item

You do not have to order the whole quantity at once. Order 12 m³ of the 18.64 m³ of concrete now and the rest later, and both orders count toward the same item's committed cost.

The **Allowance** and **% Cost** figures show how much of the item you have committed, so you can see at a glance whether an item is fully ordered.

> **Watch the % Cost as you go** — An item at 118% is telling you the orders against it exceed what you allowed. Better to see that now, while you are raising the order, than in a cost report next month.

Worked example: ordering the slab

The Hendricks slab was priced with suppliers attached, so it splits into two orders.

Order 1 — Barwon Concrete

Item	Qty	Rate	Value
Concrete N32 supply and place	18.64 m³	$228.00	$4,249.92
Concrete pump	1 item	$850.00	$850.00
			$5,099.92

Order 2 — Surf Coast Steel

Item	Qty	Rate	Value
SL72 mesh	195.72 m²	$9.40	$1,839.77
Vapour barrier	205.04 m²	$3.10	$635.62
			$2,475.39

Both come to $7,575.31 against an allowance of $8,154 — so the slab is committed at 93% of what was allowed, with the bedding sand still to order.

Neither order needed anything typed except the delivery date. The descriptions, quantities, rates and part numbers all came from the bill.

Templates

Create new template saves an order's shape for reuse.

Useful for orders you raise on every job with the same structure — a standard scaffold hire, a standard site-establishment order, a recurring monthly charge. The template carries the items and layout; you set the quantities and dates each time.

Text templates

Separately from the order template, each block of text on the **Notes** tab keeps its own set of saved wordings — the **order note**, the **terms**, the **invoicing requirements**, and the covering **email**.

Write it once, **Save as template**, and load it on the next order.

Beside each block is a **Default** box. Pick a template there and every new order starts with it already filled in; pick **Default: none** to go back to starting blank. That is the point of it: terms that are on every order by default are terms your suppliers have actually agreed to, rather than ones somebody remembered to paste. The default is for the whole company, and the template it uses stays marked `· default` in the list. SmarteBuild's own templates cannot be the default - save your own copy of one first.

The internal comment has no templates, because it is different every time.

Duplicating

Duplicate copies an existing order. Faster than a template for a one-off repeat — the second concrete pour on the same job, or the same order on the next job in an estate where every house is identical.

Check the dates and quantities after duplicating. A duplicated order carries the original's delivery date, and an order asking for concrete last month gets noticed by the supplier rather than by you.

Approve

Approve marks the order as authorised. Whether this matters depends on your process — some builders require a second person to approve anything over a threshold; others approve their own as a formality.

Either way, approval is what distinguishes a draft you are still assembling from an order that is ready to go out.

Attaching files

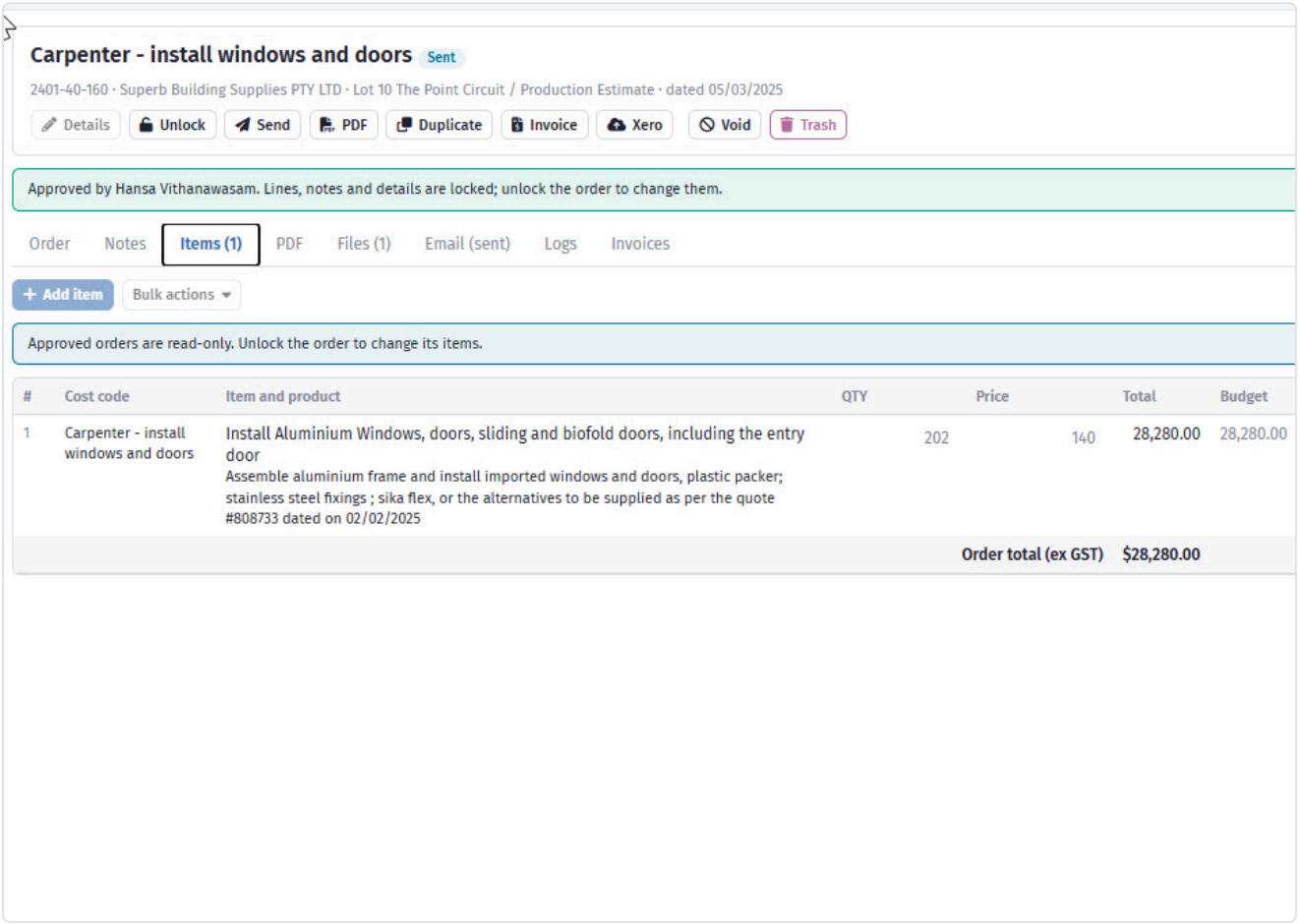
Attach Files adds documents to the order — a drawing extract, an engineer's detail, a colour schedule, a site access plan. It opens the file picker: tick the files to attach, or drop a new one in - see Attaching files.

Attaching the relevant drawing to the order is worth the few seconds. It removes the most common reason a subcontractor rings the office, which is that they have the order but not the detail it refers to.

24.3 Order details BUILDER PLAN

Every field on a purchase order, which ones the supplier actually reads, and how to link an order to a schedule task.

Beyond the items, an order carries the details that make it actionable — who, when, where, and against what.



Dates, terms, invoicing requirements and what prints on the order.

The fields

Field	What it does
Contact / Contact Name	Who at the supplier the order is addressed to
Date	The order date
Invoice Date	When you expect to be invoiced
Invoice Due Date	When payment falls due
Invoice Number (Reference)	The supplier's reference, once known
Category	How the order is grouped in the list
GST	Whether GST applies
Allowance	What the BOQ allowed for these items
% Cost	How much of that allowance this order commits
Link to a Task	Ties the order to a schedule task
Label	Your own tag on the order
Hide Prices	Sends the order without rates
Invoicing requirements	How you need this supplier to invoice you — prints on the order

The ones the supplier reads

Three fields do most of the work on the supplier's side.

Contact Name. An order addressed to a person gets actioned. One addressed to a company gets opened by whoever happens to be at the desk.

The site address, which comes from the project. If it is blank, you get a phone call. See Creating a project.

Purchase Order Note on each item — printed on the order, and where delivery constraints belong. *"Deliver to rear lane, no crane access, ring 30 min ahead"* prevents more problems than any other field in the system.

Hide Prices

Hide Prices sends the order without rates.

Use it for a subcontractor working to a lump sum you have already agreed, where the breakdown across items is your internal allocation rather than something they need — or should see.

> **Careful** — Hide Prices affects what is printed and sent. It does not change what the order commits internally, and it does not hide anything from your own reports. Check the preview before sending if you are unsure which mode you are in.

Merge

Merge on the toolbar controls how the order's items print. Merged, similar items are combined into one line on the PDF; unmerged, every item is listed separately.

It changes the printed order only — not the items, not the quantities, and not what the order commits. It is a toggle, so pressing it again puts the PDF back.

Merged reads better for a supplier quoting a single product across several parts of the job: one line for 240 lineal metres of a timber size, rather than eleven lines that add up to it. Leave it unmerged when the supplier needs to see the split — a subcontractor pricing by area, or anything where the breakdown is the point.

Invoicing requirements

Invoicing requirements sits under the order note and terms, and prints on the purchase order. It is where you tell the supplier how you need to be invoiced.

It is worth filling in for anyone who invoices you badly. The things that cost the most time to chase:

- what to quote on the invoice — the order number, almost always
- where to send it, if that is not the address they already have
- how often — monthly in arrears, on delivery, on completion
- what a progress claim has to show, if you take them

Like the note and the terms, it has its own **templates**: write the wording once, save it as a template, and load it on the next order. Save the one you use most as the default and every new order starts with it.

> **Note** — Invoicing requirements print on the purchase order, so they are visible to the supplier. Anything you do not want them to see belongs in the **internal comment**, which is never printed and never emailed.

Link to a Task

Link to a Task ties the order to a task in the schedule.

Two things follow. The order shows up against the task, so anyone looking at the schedule can see what has been committed for that work. And the schedule's cash flow view can use the order's value and dates, so committed money appears on the curve at the point it is actually due.

A task can be paid by one order only, so the picker offers only tasks that no other order is already paying for. If the task you want is missing, it is almost always because another order has it — unlink it there first.

A full schedule is a long list, so the picker has a box at the top: **type any part of a task's name** and the list narrows as you type. Ticks are kept while you change what you have typed, so you can tick two tasks found by different searches and link them together — the count beside the box tells you how many are ticked, including any the current filter is hiding.

Linking also asks for **the share of this order** that the task covers, and the payment terms that follow from it. An order that pays for two tasks might be 60% on delivery and 40% on installation; the schedule's cash flow uses those shares and dates to put the money on the curve at the right point.

If you are running the schedule in SmarteBuild, link the orders. If you are not, leave it blank — nothing else depends on it.

Allowance and % Cost

Allowance is what the BOQ allowed for the items on this order. **% Cost** is what proportion of that allowance the order commits.

Read them together as you raise the order:

% Cost	Means
Under 100%	Committed less than allowed, or part-ordered
Around 100%	Ordering the full scope at the allowed rate
Over 100%	This order alone exceeds what you priced

Over 100% is not necessarily wrong — a rate may have risen since you tendered, or the scope may have grown. But it should be a decision rather than a discovery, and this is where you get to make it.

Categories and labels

Category groups orders in the list. **Label** is a free tag of your own.

Both are worth using consistently if you raise a lot of orders. Categories along the lines of `Materials`, `Subcontract`, `Plant hire`, `Fees` make the list scannable, and let you answer "how much subcontract have we committed?" without adding anything up by hand.

Estimates

An order belongs to one estimate. The **Estimates** picker on the order is how you confirm which priced version you are committing against — worth checking on a job that carries several.

The procurement list

If you are using **Procurement** (Schedule › Procurement), the order carries a **Procurement** panel showing what it covers — the item, its category, when it has to be on site and the last day to order it — and whether it counts as ordered.

Link an item adds one. Type any part of a name to find it; only items no other order covers are offered, because an item can be covered once. **Unlink** takes it off this order, and the item goes back to being uncovered.

Once an item is linked, the order decides its state: it reads **Ordered** from the moment this order is sent, and goes back to **Not ordered** if it is not. Nobody has to keep the procurement list in step by hand — that is the point of linking.

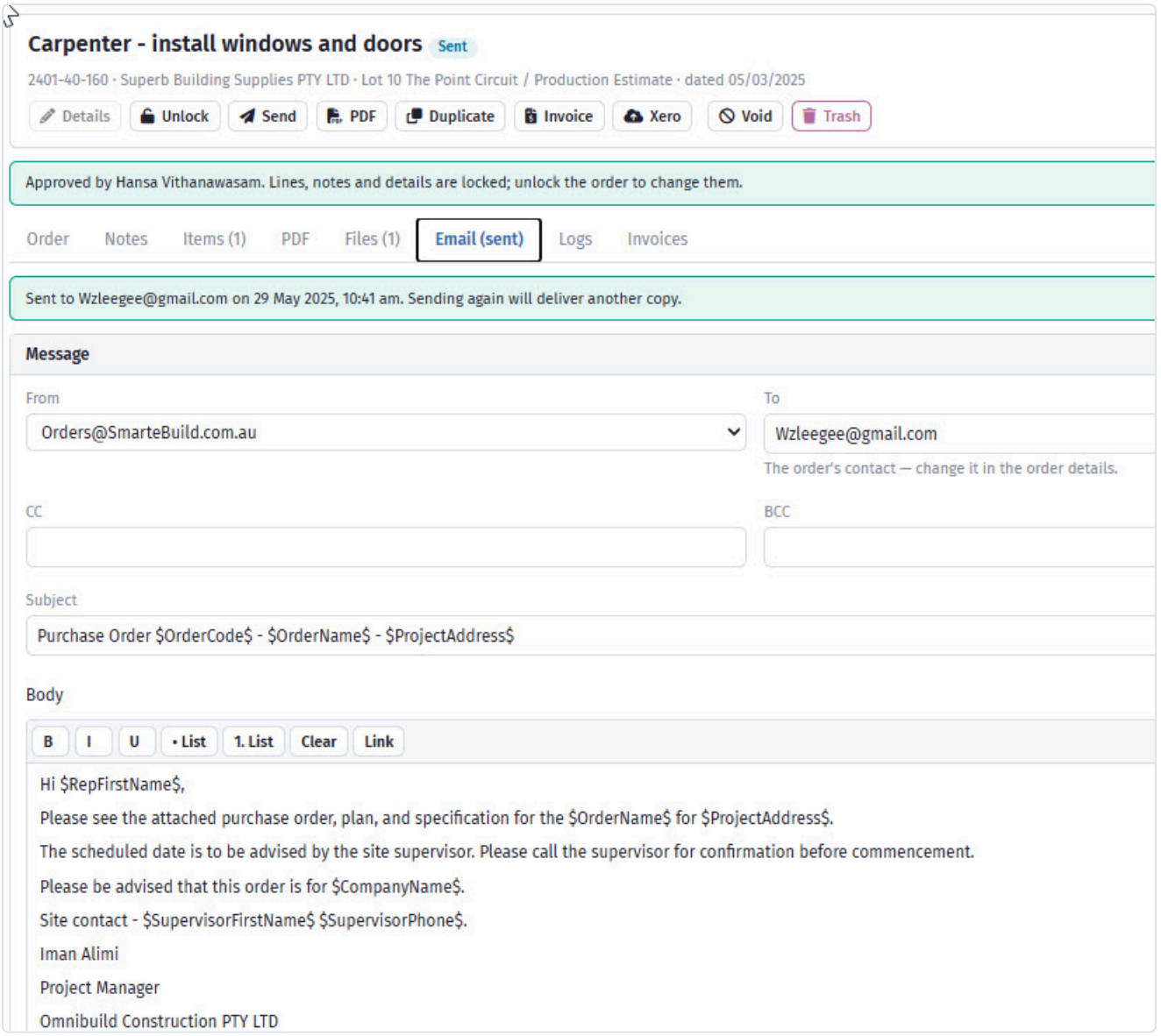
The same link can be made from the other end, in the Procurement tab's own item panel. Linking needs the **Edit tasks** permission; without it the panel still shows what the order covers, but offers nothing to change. If your company is not using Procurement, the panel is not there at all.

24.4 Sending an order BUILDER PLAN

Emailing an order to a supplier, CC and BCC, attachments, the $Token$ shortcodes, and exporting instead of

sending.

Once an order is approved, it goes to the supplier by email from within SmarteBuild — which means the sent order is recorded against the job rather than sitting in someone's mailbox.



The order goes from here, so the sent copy stays with the job.

An order must be approved before it can be sent

SmarteBuild will not email an unapproved order. If you try, you get:

> Approve this order before sending it to the supplier.

This applies everywhere — the orders page, the orders list, the call-up sheet, and re-sending from the mobile app. A purchase order is a commitment, and approval is the step that records that somebody accepted it.

If you are looking at an order you cannot send, check the **Approved** line under **About** on the order's details. Approving is one button on the toolbar, and you need the *Approve Orders* permission to use it.

> **Re-sending from the phone** — The mobile app can only re-send an order that has already been sent once from the desktop, and now only if it is still approved. An order that was unapproved after being sent will refuse to re-send until it is approved again.

Unlock puts it back

Unlock on the toolbar reverses an approval, and is how you edit an approved order — its details are read-only until you do.

An unlocked order cannot be sent. If you unlock one to correct a quantity, approve it again before sending, or the send is refused with the message above.

Sending

Send from the **Send** button at the top of the order, or from **Send to supplier** on the **Email** tab. Both do the same thing: the Email tab opens so you can see what is going out, and you are asked to confirm before anything reaches the supplier.

The send dialog carries:

Field	Notes
From	The address the order is sent from
To	The supplier contact
CC	Separate multiple addresses with `;`
BCC	Same, and see below
Attach Files	Anything attached to the order

CC and BCC

Use `;` between addresses, not commas.

CC is the right choice for the site supervisor, so they know what has been ordered and when it is due.

BCC to your own office address is worth doing as a habit. It gives you a copy in your normal mail system, which is occasionally what you need when a supplier claims they never received something.

> **CC the supervisor, every time** — The most common cause of a delivery arriving with nobody expecting it is that the person on site was never told it was coming. It costs one address in a field you are already filling in.

Attachments

Attach Files sends the documents attached to the order alongside it — drawings, details, colour schedules, site access notes.

Attach the drawing the order refers to. A subcontractor with the order but not the detail rings the office; one with both starts work.

Shortcodes

The **subject** and **body** understand `$Token$` placeholders, replaced with the real values as the email goes out. The menu beside the body lists every one it knows.

Use them in a saved template and one wording serves every order — *"Hi `$RepFirstName$`, please find order `$OrderCode$` for `$ProjectName$`"* comes out addressed properly each time.

Group	Tokens
This order	`$OrderName$`, `$OrderCode$`
Supplier	`$RepFirstName$`, `$RepLastName$`, `$RepFulName$`
Project	`$ProjectName$`, `$CostingName$`, `$ProjectAddress$`, `$ProjectAddress1$`, `$ProjectAddress2$`
Supervisor	`$SupervisorFullName$`, `$SupervisorFirstName$`, `$SupervisorLastName$`, `$SupervisorEmail$`, `$SupervisorPhone$`
You	`$UserFullName$`, `$UserFirstName$`, `$UserLastName$`, `$Signature$`
Your company	`$CompanyName$`, `$CompanyAddress$`, `$CompanyAddress1$`

> **`$RepFulName$` is spelt with one `l`** — That is not a typo in this page. The token really is `$RepFulName$`, and the correctly spelt version does nothing. Pick it from the menu rather than typing it and the question does not arise.

A token that is not recognised is left exactly as you typed it, so a misspelling reaches the supplier as `$OrderNumber$` in the middle of a sentence. Insert from the menu and that cannot happen.

While it sends

Sending runs in the background. The page watches for it to finish, but you can leave the tab or move to another order and the send carries on.

An order that has already gone shows when it was sent, and the button becomes **Send again** — which delivers another copy rather than doing nothing.

Check before you send

Six things, in about twenty seconds:

1. **It is approved.** Otherwise the send is refused — see above.
2. **The contact.** Addressed to a person, not just a company.
3. **Hide Prices.** Correct for this supplier — see Order details.
4. **The dates.** Particularly if the order was duplicated from an earlier one.
5. **Invoicing requirements.** If you need this supplier to invoice a particular way, it prints on the order — see Order details.
6. **The site address.** It comes from the project, and a blank one produces a phone call.

Exporting instead

Export produces the order as a document without sending it.

Use it when a supplier wants orders through their own portal, when you need a copy for a file, or when the order is going out with a batch of other paperwork.

Exporting does not mark the order as sent, so if your process relies on that status, note it somewhere. An exported-but-not-sent order looks identical to one nobody has actioned yet.

Xero

Export order to Xero pushes the order into Xero, if the connection is set up under **Integrations**.

This is separate from sending it to the supplier. Sending tells the supplier what you want; exporting to Xero tells your accounting system what you have committed. Most builders do both.

Re-sending a changed order

If an order changes after it has gone out — a quantity revised, an item added — send it again, and say so in the covering email.

A supplier who receives a second order with the same number and no explanation usually assumes it is a duplicate and ignores it. One who is told *"revised — the mesh quantity has increased"* acts on it.

For work that is no longer going ahead at all, void the order rather than sending a revision. See Voiding, trashing and deleting.

24.5 Voiding, trashing and deleting BUILDER PLAN

The difference between cancelling an order the supplier already has and clearing away one raised in error, how to undo either, and when an order cannot be deleted at all.

Work gets cancelled, scopes change, and orders get raised by mistake. Those are two different problems, and SmarteBuild now treats them as two different actions.

Void cancels an order the supplier already has. **Trash** clears away one that never went anywhere.

Which one you want

The question to ask is *has anybody outside the office seen this order?*

	Void	Trash
For	An order already sent	A mistake, a duplicate, an abandoned draft
The order stays in the list	Yes, marked **Voided**	No — it moves to the bin
Committed cost released	Yes	Yes
The supplier can be told	Yes	Yes
Undo	**Un-void**	**Restore**

Both offer to email the supplier, and both are reversible. Neither destroys anything.

> **Void only appears on an order that has been sent** — On an unsent order there is nothing to cancel and nobody to tell, so the button is not offered — **Trash** is the honest action for a draft that is not going ahead.

Voiding

Void on the order's toolbar. You are asked for:

- A **reason** — why it is being cancelled.
- Whether to **notify the supplier**.

The order stays in the list carrying a **Voided** badge, which outranks its workflow status: a cancelled order does not go on reading as *Sent*.

Write the reason for someone reading it in a year, not for yourself today. *"Scope moved to Order 2026-041-14 after client changed the roof"* is useful. *"Not needed"* is not.

Notifying the supplier

Do notify, for anything already sent. A supplier who is not told is entitled to deliver against the order they hold, and the argument about who pays for the concrete on the truck is one you will lose more often than you win.

The offer only appears when there is somebody worth telling — the order actually reached them, and their contact has an email address. You will not be asked about a draft that never went out.

The only time to skip notification is when you have already spoken to them and the void is a formality catching the system up with a conversation.

Un-voiding

Un-void reverses it, and the committed cost comes back with it.

> **Un-voiding does not tell the supplier** — The cancellation email has already gone. As far as the supplier is concerned the order is dead until you tell them otherwise — so ring them, or send the order again with a note saying it is back on.

Trashing

Trash moves the order to the bin. Use it for an order raised against the wrong estimate, a duplicate, or a draft for work that never started.

It is reversible — **Restore** brings it back exactly as it was.

Finding a trashed order

Trashed orders are hidden from the list. Tick **trashed** beside the status filter to show them, and an order in the bin is labelled as such when you open it.

That tick is the answer to *"where has that order gone?"*, which is otherwise a genuinely puzzling few minutes.

Trashing also offers the supplier notice, on the same rule as voiding: only when the order actually reached someone. In practice you will rarely see it here, because an order worth trashing is usually one nobody outside the office saw.

Deleting permanently

Delete permanently appears only on an order already in the bin. It is the one action on this page that cannot be undone.

Two things stop it:

- **The order must be in the trash first.** There is no single step from a live order to gone.
- **An order with invoices against it cannot be deleted at all.** The refusal is deliberate — deleting it would leave expenses pointing at an order that no longer exists, and nothing would reconcile.

> **Never permanently delete an order the supplier has seen** — If a supplier holds a copy of an order that no longer exists in your system, you have no record of what you asked for or when you cancelled it. That is the position you do not want to be in when an invoice arrives against it. Void it, or leave it in the bin.

What happens to the committed cost

Voiding and trashing both release the committed cost back. The items return to being allowed-but-not-committed, and the `% Cost` on those items drops accordingly.

That is what makes both safe from a cost-tracking point of view: your committed total goes back to reflecting reality, and the cancelled order does not sit there inflating it.

If an invoice already exists

An order that has been invoiced against is a different problem. Voiding it leaves an expense pointing at a cancelled order, which will not reconcile — and permanent deletion is refused outright.

Deal with the invoice first — credit it, or have the supplier reissue — and then void the order. If part of the work was done and invoiced legitimately, the cleaner approach is usually to revise the order down to what was actually supplied rather than voiding it at all.

Worked example

The Hendricks client changes from a tiled roof to colorbond after the tile order has gone out.

1. Open the tile order.
2. **Void**, reason: *"Client changed roof to colorbond, 28/09. Replaced by order 2026-041-19."*
3. Notify the supplier — ticked.
4. Raise the new order against the colorbond items.
5. Raise a variation for the cost difference to the client.

Step five is the one people forget. Voiding an order fixes your committed cost; it does not tell the client the job has changed price.

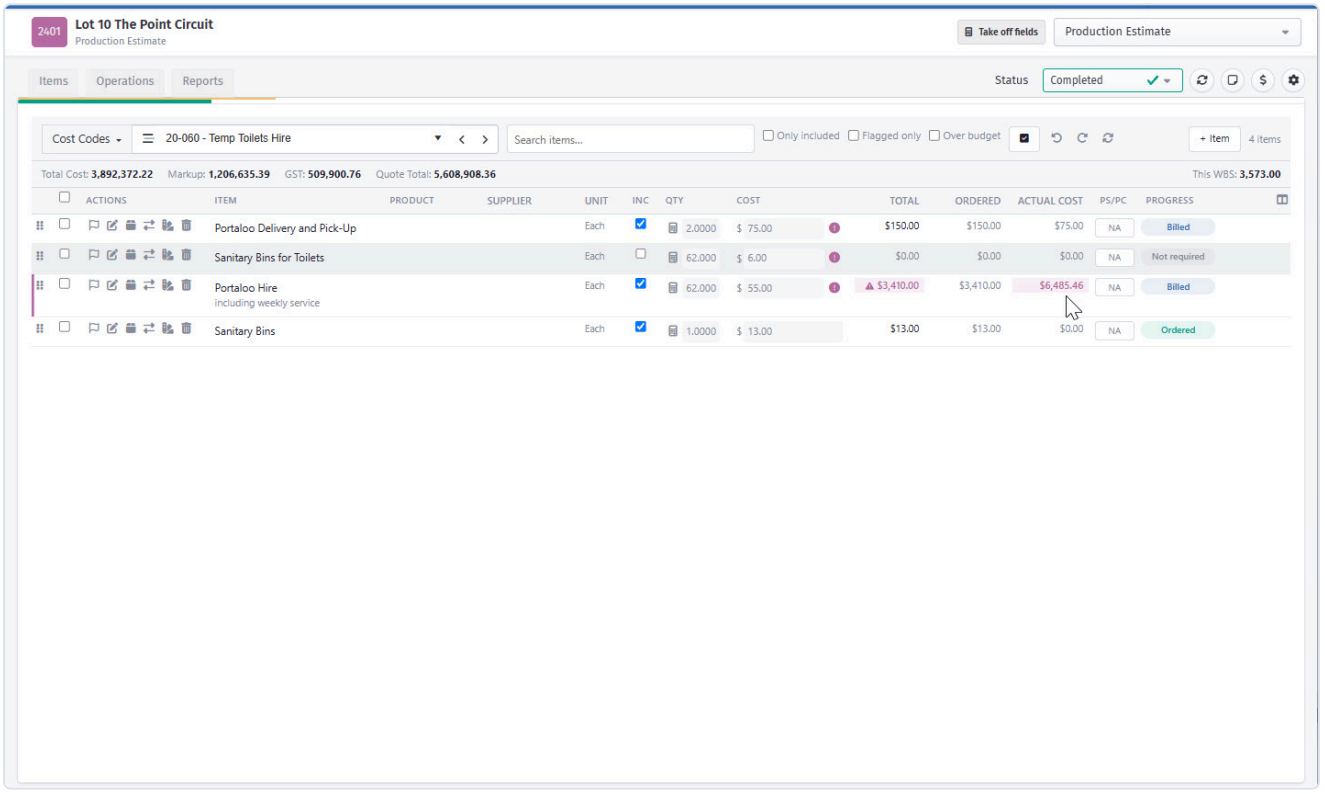
24.6 Committed vs actual cost BUILDER PLAN

The three cost numbers on a job, what the gaps between them mean, and how to read them before it is too late to act.

Three numbers describe the cost of a job. Reading them together is how you find out a job is going wrong while you can still do something about it.

Number	Comes from	Answers
Allowed	The Bill of Quantities	What did I price?
Committed	Purchase orders	What have I promised to pay?
Actual	Expenses	What have I been charged?

Turn on **Show Actual Costs Columns** in the BOQ to see all three per item.



What you have promised, against what has actually been invoiced.

Reading the gaps

Committed above allowed means you have ordered more than you priced. Either a rate has risen, the scope grew, or the estimate was light. Whichever it is, it is visible now rather than at the end.

Actual above committed means you were charged more than you ordered. This is the one to chase — an invoice that exceeds its order is either a supplier error, an undocumented variation to the order, or work nobody authorised.

Committed well below allowed, late in a trade usually means orders have not been raised, rather than that you are under budget. It is the most common false comfort in job estimate.

> **The gap that matters most is actual over committed** — An invoice exceeding its order is the cheapest problem to fix and the most expensive to ignore, because it is the one you can still query. Once it is paid, you are negotiating a credit instead of a correction.

Worked example

The Hendricks slab, mid-job:

Item	Allowed	Committed	Actual
Concrete N32	$4,250	$4,250	$4,612
Concrete pump	$850	$850	$850
SL72 mesh	$1,840	$1,840	$1,840
Vapour barrier	$636	$636	$636
Bedding sand	$578	$0	$0
Slab	**$8,154**	**$7,576**	**$7,938**

Two things stand out.

The concrete is $362 over. Actual exceeds both the order and the allowance — worth a phone call. Usually this is an extra part-load, a waiting charge, or a pump-out. If it is legitimate, it is a cost overrun to note; if it is not, it is a credit to claim.

The bedding sand is not committed. The slab is poured, so either it was supplied under the concrete order and the item should be closed off, or it was never ordered and an invoice is coming.

The trade total looks fine — $7,938 against $8,154 allowed. Only the item detail shows both problems.

Where to look

Where	Shows
BOQ with actual cost columns	Item-level, the most detail
Estimate metrics on the Projects list	Job-level, cost against budget
The orders list	Everything committed, filterable by supplier
Expenses list	Everything charged, with **Hide billed orders**

A routine that works

Once a month, or at each claim:

1. Open the BOQ with actual cost columns on.
2. Scan for any item where **actual exceeds committed** — query those.
3. Scan for trades that are complete but barely committed — chase the missing orders.
4. Check the estimate metrics for the job-level picture.

Fifteen minutes. It catches supplier overcharges while they are still arguable and missing orders before the invoice arrives.

Why this depends on ordering properly

None of the above works if orders are skipped. Without a committed figure, the only comparison available is allowed against actual — which tells you about the overrun only once the money is spent.

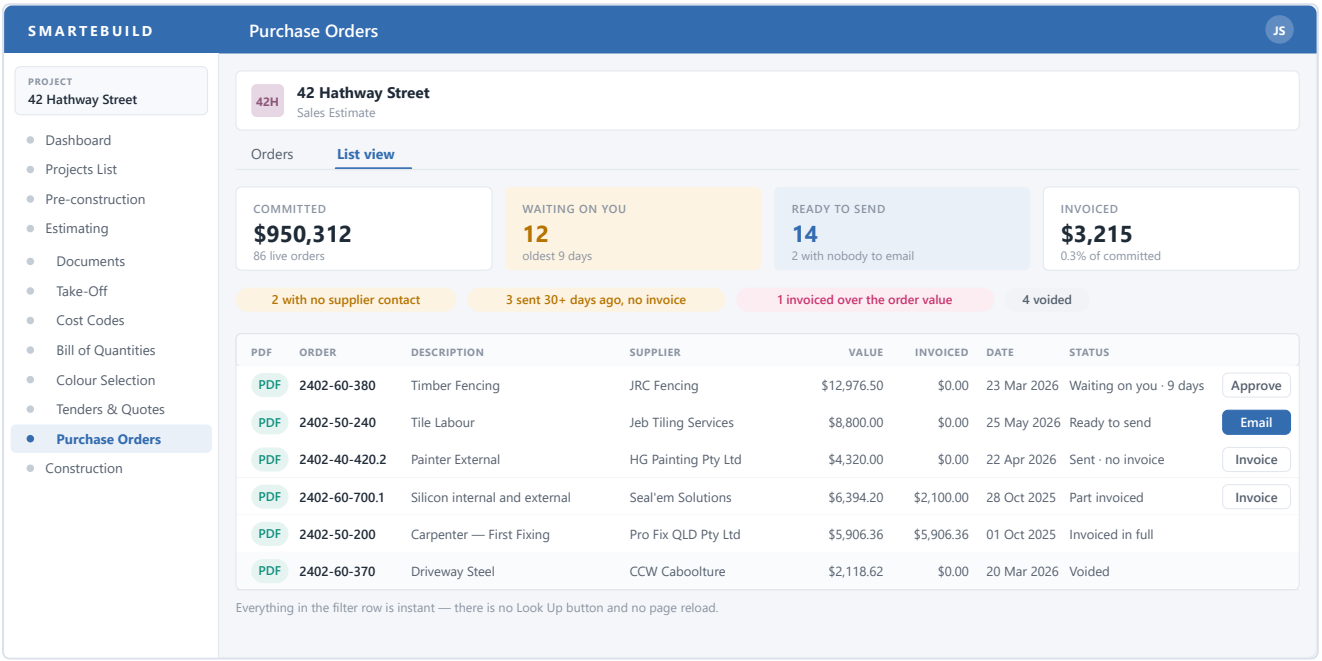
The committed column is the early-warning one, and it exists only if you raise the orders.

24.7 The orders list BUILDER PLAN

Every purchase order on an estimate, or across all your jobs, with what is committed, what is waiting on you and what never went to the supplier.

The **Orders** list answers three questions at a glance: what have we committed, what is waiting on you, and what never went to the supplier. It is where you work through orders; the order itself is where you change one.

Open it from the **Orders** menu, or with the list button above the orders on the Orders screen.



What is committed, what is waiting on you, and the one thing each order needs next.

The four figures at the top

Each one is also a filter. Click it to show only those orders, click it again to show everything. The figures do not move when you filter, so you can jump between them.

Figure	What it is
Committed	The value of every live order. Voided orders are left out; they are no longer committed.
Waiting on you	Raised but not approved, with the age of the oldest. An unapproved order cannot be emailed.
Ready to send	Approved and still sitting here — the supplier does not know about these yet. It also says how many have nobody to email.
Invoiced	Supplier invoices raised against these orders, and what share of the committed figure that is.

Beside them is the estimate's **budget** and how much of it these orders have committed. That panel is per estimate, so it is not shown under **All jobs**.

Finding an order

Everything in the filter row is instant — there is no **Look Up** button and no page reload.

To find	Use
An order by number, supplier or description	The search box
Orders at one stage	**All**, **Waiting on you**, **Ready to send**, **Sent**, **Invoiced**
One type of order	The **category** box — type to filter it
One supplier's orders	The **supplier** box — type to filter it
Orders in the trash	**More filters**
Orders on every job	**All jobs**, beside the title. The list then also shows each order's project and estimate.

Choosing the columns

Columns, on the filter row, opens a list of tick boxes: tick a column to show it, untick it to hide it. Your choice is saved against your sign-in, so the list looks the same on your office computer, your laptop and anywhere else you sign in.

Changing a column's width

Every column can be made wider or narrower. Point at the line between two headings — the pointer turns into a double arrow — then drag it left or right. Widths are saved against your sign-in too, so the list opens the way you left it, on any computer.

A few shortcuts:

- **Double-click** that line to put one column back to its normal width.
- **Reset column widths**, at the bottom of the **Columns** list, puts them all back.
- Without a mouse: tab to the line and use the left and right arrow keys (hold Shift to move in smaller steps).

Text too long for its column is cut off with a `…`, and hovering over the cell shows the whole thing. If the columns together are wider than the window, the list scrolls sideways rather than squashing everything.

Long lists are paged: the arrows at the bottom move a page at a time, or jump to the first or last.

> **The counts are never just this page** — Every figure is worked out across all the orders that match, not the page in front of you. The total at the bottom follows your whole filter, while the tiles and the *needs a look* chips deliberately ignore the stage you have selected — otherwise clicking **Waiting on you** would zero every other tile and there would be nothing left to compare against.

Needs a look

Under the filters are counts of the orders worth a second look. Each one filters the list to exactly what it counts, and a count of zero is not shown.

- **with no supplier contact** — not sent, and nobody is chosen to send it to.
- **sent 30+ days ago, no invoice** — either an invoice is missing, or the work did not happen and the order should be voided.
- **invoiced over the order value** — more has been invoiced than you ordered.
- **voided** — cancelled and kept on record.

Reading a row

A row reads left to right: **PDF**, the order number, what it is for, the supplier, the value, how much has been invoiced, the date, and then where the order has got to, in words — *Waiting on you · 9 days*, *Ready to send*, *Sent · no invoice*, *Part invoiced*, *Invoiced in full*, *Voided*.

PDF opens the purchase order itself without leaving the list.

At the end of the row are its markers — **no contact**, **over** and **note** flag the things above — and then the one thing that can be done to that order next: **Approve**, **Email**, or **Invoice**.

Opening an order

Click a row and the order opens in a panel beside the list. The list stays where it is, so clicking another row swaps the panel rather than making you close it first. The arrows step through the page and Escape closes it.

The panel carries the order's status and value, its contact, date, category and cost codes, its items and any invoices against it — and the same actions as the row, plus the internal comment. It is for a look: nothing in it is typed into.

Changing the order without leaving the list

Open the order, at the top of the panel, opens the whole order in a window over the list — every tab (items, notes, PDF, files, email, logs), all of it editable, exactly as on the order's own page. **Double-clicking a row** does the same thing in one move.

Close it with ✕, with Escape, or by clicking the greyed area around it, and the list is re-read so anything you changed — approved, emailed, lines edited — shows straight away. The orders behind stay where they were, so you can work through several without losing your place.

For a long items list, **Open the full page** in the window's heading leaves the list and opens the order on its own screen, with the full width to work in.

Working through several at once

Tick the orders you want and the actions appear along the bottom: **Approve**, **Email to suppliers**, **Download**. Each button says how many of the ticked orders it can act on, because it is often not all of them — approving skips the already-approved, and emailing skips anything unapproved or with no contact.

Ticks are per page.

What is at the bottom

The totals under the list are for **everything that matches your filter**, not just the page on screen: the number of orders, their order value, what has been invoiced, and what is left to invoice.

CSV downloads the rows on screen as a spreadsheet, with plain numbers Excel can add up. For more rows, set **Show** to 500 first.

Check what the export contains before it goes anywhere outside the office — a commitments list shows what you are paying your subcontractors, which is not information a client needs.

A weekly routine

1. **Waiting on you** — approve them, or ask why they were raised.
2. **Ready to send** — send them; an order the supplier never saw is not a commitment they know about.
3. **with no supplier contact** — pick a contact so they can go out.
4. **sent 30+ days ago, no invoice** — chase the invoice, or void the order.
5. **invoiced over the order value** — agree a variation, or query the invoice.

Five minutes, and the committed figure stays honest — which is what everything in Committed vs actual cost depends on.

CHAPTER 25

Variations

25.1 When to raise a variation BUILDER PLAN

What counts as a variation, why raising them promptly is the difference between getting paid and absorbing the cost, and the shape of the process.

A variation is a change to the contracted scope. Something is added, removed, substituted or changed after the contract was signed, and the price and often the programme change with it.

What counts

Situation	Variation?
Client asks for a different benchtop	**Yes**
PC allowance exceeded by the client's selection	**Yes** — the difference
Latent site condition — rock in the excavation	**Yes**
Design change from the architect	**Yes**
Council imposes an extra requirement	**Yes**
You underestimated the brickwork	**No** — that is your risk
A supplier raises their price mid-job	**No**, usually — check your contract
Client deletes the deck	**Yes** — a credit variation

The line is whether the **scope** changed, not whether the **cost** changed. Your own estimating error is not a variation. A client's change of mind is, even when it saves money.

Raise them immediately

This is the whole thing.

A variation raised the day the client asks for the change is a conversation about a price. The same variation raised two months later, after the work is built, is a conversation about whether they agreed to it — and those conversations are lost more often than they are won.

> **Unwritten variations are the most common way builders lose money** — Verbal agreement on site is not a record. If the client asks for something and you build it without a signed variation, you are relying on their memory and their goodwill at the exact moment they are least inclined to have either — when the final claim arrives.

The process

1. **Raise the variation** as soon as the change is known — see Creating a variation.
2. **Price it**, including any extension of time.
3. **Send it to the client** for approval.
4. **Get it accepted** before the work is done.
5. The contract sum moves, and the variation becomes claimable.

Step four is the one under pressure on a live site, and the one worth holding the line on.

Credit variations

A variation can reduce the contract. The client deletes the deck, the price comes down.

Raise these with the same discipline as additions. A documented credit is evidence that you passed the saving on, and it keeps the contract sum accurate — which matters because progress claims are percentages of it.

Extension of time

A variation can carry an **Extension of time (days)**. Adding work usually adds programme, and if you do not claim the time when you claim the money, you have accepted the original completion date for a larger scope.

That is how builders end up in liquidated damages on a job they were never late on.

In this section

- Creating a variation
- Getting client approval
- How variations affect the job
- The variations list

25.2 Creating a variation BUILDER PLAN

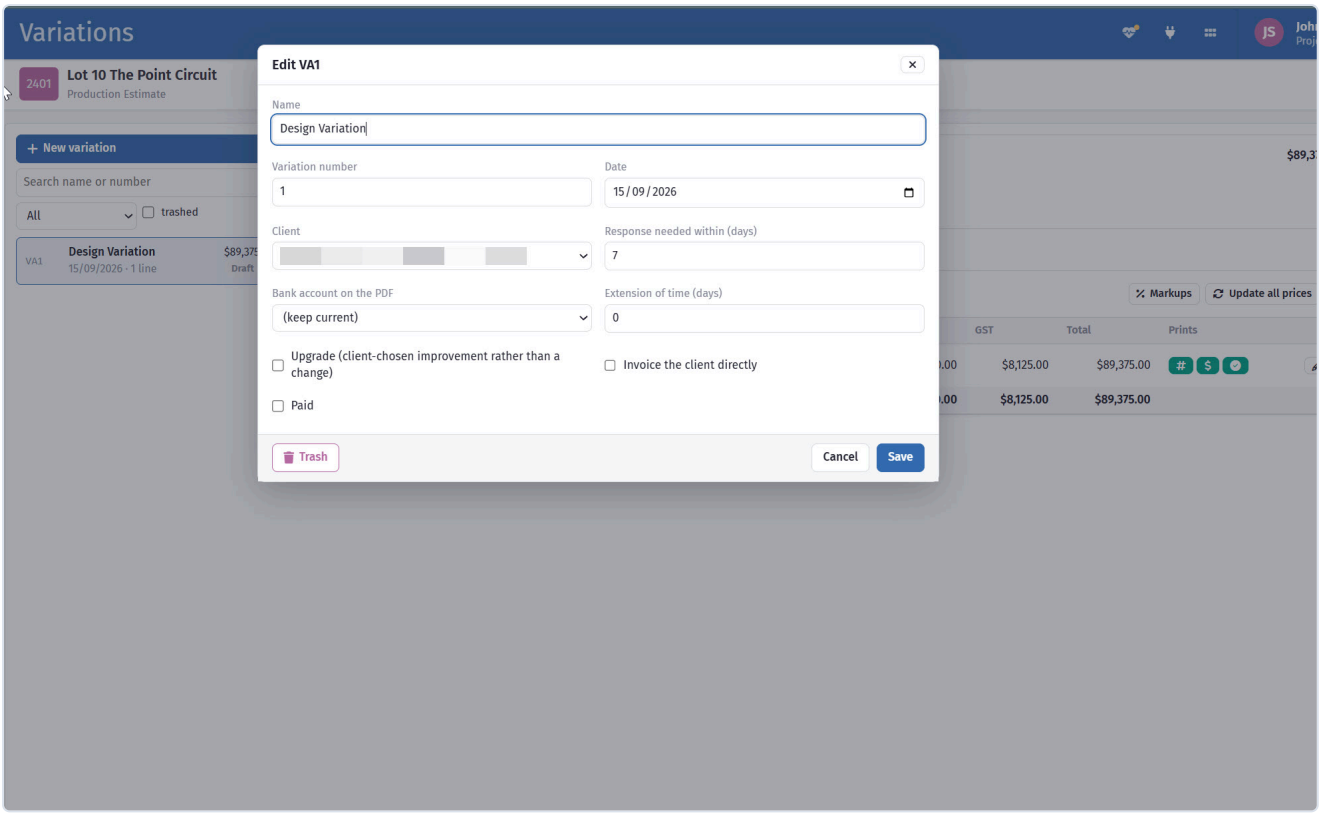
Building a variation from BOQ items or from scratch, pricing it, writing the description the client will read, and claiming time.

The Variations screen is the estimate's list on the left and the selected variation on the right, with four tabs: **Lines**, **Notes**, **Files** and **Email**. The **Tracker & approval** button opens the same drawer the Variations Board uses: approval, applying to the BOQ, the client links and the activity log.

Three ways to start one:

- **New variation** on the Variations screen: name, number, date, client, bank account and extension of time, then add lines.
- **From the BOQ**: tick the items on the Bill of Quantities, open the bulk menu and choose **Variation**. Pick *add* (one line per item at the quantity you type, defaulting to the BOQ quantity) or *take out* (a credit at the BOQ quantity). The variation opens in the editor, priced from the items with the default markup, ready for wording and markup.

- **From the colour schedule**: **Create variation from selections** makes one with a line per upgrade above allowance — see Running a selection.



Describe the change, price it, and send it for approval.

Lines

Markups

	Cost	Markup	GST	Total	Prints
lour TBC	$0.00	$0.00	$0.00	$0.00	
	$0.00	$0.00	$0.00	$0.00	
surrounding, in lieu of tile.	$0.00	$0.00	$0.00	$0.00	
	$0.00	$0.00	$0.00	$0.00	
attery storage'	$47,272.73	$11,818.18	$5,909.09	$65,000.00	# $
H timber fixed panels - Material supply by owner'	-$4,446.00	$0.00	-$444.60	-$4,890.60	# $
l will be delivered from China and the material and	$0.00	$0.00	$0.00	$0.00	
to match windows frame colour	$0.00	$0.00	$0.00	$0.00	
alustrade ' in lieu of 'Stainless Steel Wire Balustrade -	$0.00	$0.00	$0.00	$0.00	# $
o W27 in bed 3 in front of the WIR 3 opening.	$432.00	$108.00	$54.00	$594.00	
	-$982.00	-$245.50	-$122.75	-$1,350.25	
iving walls to be brick	$0.00	$0.00	$0.00	$0.00	
to pool to be timber look colour. Colour to be confirmed	$0.00	$0.00	$0.00	$0.00	
Total (13 of 13 lines) · GST 10%	**$42,276.73**	**$11,680.68**	**$5,395.74**	**$59,353.15**	

Lines carry their own quantities and rates, exactly like the bill.

Every line has a type, and the type decides how it is priced and what happens in the BOQ when the variation is applied:

Type	Priced as	Applied to the BOQ as
Add Item	cost × quantity	the item included, or its quantity increased
Remove Item	a credit of cost × quantity	the item marked not included
Change Product	new product × qty less old product × qty	the item's product swapped
Change Item	new item less old item	old item out, new item in
Note	nothing	nothing — text that prints
Combined	the net of its item changes (see below)	every change made, as if each were its own line

Pick the cost code, then the item — or leave the cost code on *whole estimate* and search by name. Choosing an item fills in its quantity and product. **Write description from the items** builds the wording from the type's template ("Provide X in lieu of Y"); edit it — it is what the client reads.

The grid shows each line's **Addition** (what it puts in: new items, products or extra quantity) and **Credit** (what it takes out, at cost). **Cost** is the addition less the credit, so a product change that adds $13,800 of double glazing and credits $9,600 of single glazing costs $4,200. The totals row adds up both columns. A cost you type over by hand shows as an addition if it is positive and a credit if it is negative.

Export to Excel (above the grid) downloads the lines as a spreadsheet: the variation's details at the top, then every column in the grid, plus the note, internal comment, quantity and whether the price and quantity print, whether the line counts toward the total, and whether it has been applied to the BOQ. Amounts are numbers, so they add up in Excel. A combined line's item changes are listed in italics beneath it for reference; the line above them carries the price. Without permission to see variation costs, the Addition, Credit, Cost and Markup columns are left out.

Each line carries a markup structure (a percentage; manage them with **Markups**), and three switches: whether it **counts toward the total**, and whether its **price** and **quantity** print on the PDF. A line that does not count still prints — use it for a clarification with an indicative figure.

The markup is always the line's **cost × its markup %**, credits included: a −$1,000.00 credit on a 20% markup is −$1,200.00 ex GST. To credit something at cost, choose the **No Markup** (0%) structure on that line.

The variation PDF

PDF (at the top of the variation, and on the tracker) offers two layouts:

- **Quantity and price**: each line with its quantity and its total (the **Adjustment** column), then the Subtotal and the four summary tiles (Additions, Credit, Net excl. GST, Total incl. GST). This is the standard variation document.
- **Detailed**: the same document with **Addition**, **Credit** and **GST** columns added beside the quantity and total, so the client sees exactly what goes in and what comes out on every line.

The **Email** tab has the same choice under **Attach the variation PDF**, so the email carries whichever layout you pick; the client link and the email use **Quantity and price** unless you choose otherwise. A line whose price is switched off shows no figures but its description still prints.

Save & update prices recomputes the line from the items' current costs; **Save, keep prices** keeps a cost you typed over. Click a cost in the grid to override it; **Recalculate** in that dialog goes back to the computed figure. **Update all prices** does every line at once.

Use items wherever you can. A variation built from priced items carries the same rates and descriptions you used in the contract, which makes it far harder for a client to argue you have priced the change opportunistically.

Combined lines: several changes, one line

Some changes touch several items but read to the client as one decision: *"replace the carpet and tiles with timber flooring"*. A **Combined** line holds all of those item changes and shows the client one line with one price.

1. **Add line** and set the type to **Combined**.
2. Under **Item changes in this line**, choose **Remove** or **Add**, then pick the cost code or search the estimate for the item. Repeat for every item.
3. Adjust any quantity or product in the list. The running total shows additions, removals and the net cost.
4. **Write description from the items** drafts one sentence, e.g. *"Provide timber floor supply and timber floor installation in lieu of tile supply, tiling, carpet and underlay."* Edit it; it is all the client sees.

Item change	Qty	Cost
Remove tile supply	18 m²	−$1,260.00
Remove tiling	18 m²	−$1,080.00
Remove carpet	42 m²	−$1,890.00
Remove underlay	42 m²	−$420.00
Add timber floor supply	60 m²	$5,400.00
Add timber floor installation	60 m²	$2,700.00
Net cost		**$3,450.00**

The markup goes on the line's **net cost**, like every other line. At 20% that is $3,450.00 × 20% = $690.00 markup, so the line is $4,140.00 ex GST.

The client, the PDF and the claim all see one line. **Apply to BOQ** still makes every change: the four items are marked not included and the two timber items are added or increased. **Revert** undoes all of them. Each item can appear once per combined line.

> **Combined lines are edited on the Variations page** — The classic variations page shows a combined line but cannot edit it.

Worked example: a PC allowance exceeded

The Hendricks contract carries a prime cost allowance of $1,200 for tapware. The client selects fittings estimate $1,900.

Line	Value
Tapware selected by client	$1,900.00
Less PC allowance included in contract	−$1,200.00
Net cost	$700.00
Margin 12%	$84.00
Variation total, ex GST	**$784.00**
GST	$78.40
Variation total	**$862.40**

Showing the allowance as a deduction is what makes this readable. A variation that simply says *"Tapware — $862.40"* looks like a new charge for something the client believes they already paid for, and produces an argument. The version above shows they are paying the difference, which is what the contract said would happen.

> **Always show the allowance being credited** — This is the single most useful habit in writing variations. Most disputes about PC and PS items are really disputes about whether the client is being charged twice. Show the deduction and the question does not arise.

Worked example: a credit

The client deletes the rear deck.

Line	Value
Omit decking, bearers and joists	−$4,850.00
Omit balustrade	−$1,240.00
Omit deck footings	−$620.00
Net credit, ex GST	−$6,710.00
GST	−$671.00
Variation total	**−$7,381.00**

Built **From Item**, so the credit uses exactly the rates the deck was priced at. The client cannot reasonably argue the credit is light, because it is their own contract pricing in reverse. The lines above use the **No Markup** structure, so the credit is at cost; on a 20% markup the same credit would be −$8,052.00 ex GST.

Writing the description

Generate Description produces text from the items on the variation. It is a starting point and usually needs editing, because the client reads this and your item descriptions were written for subcontractors.

Compare:

Generated	Better
`Tapware PC item adj`	`Supply and install client-selected tapware in lieu of the prime cost allowance included in the contract. Allowance credited in full.`
`Omit decking, bearers, joists, balustrade, footings`	`Delete the rear deck in its entirety, including structure, balustrade and footings. All associated costs credited.`

State what is changing, what is included, and what is credited. A variation the client understands gets signed; one they have to interpret gets queried.

Extension of time

Extension of time (days) claims programme alongside money.

Ask, for every variation: does this add time? Not just the work itself — a custom-order item with a six-week lead time adds programme even if it takes a day to install.

Claim it now. An extension of time cannot sensibly be claimed retrospectively once the completion date has passed.

Templates

Create new template saves a variation for reuse. Worth doing for the ones that recur across jobs — rock excavation, a standard upgrade you are often asked for, a common council requirement.

The template carries the structure and wording; you set the amounts each time.

Note and email wordings

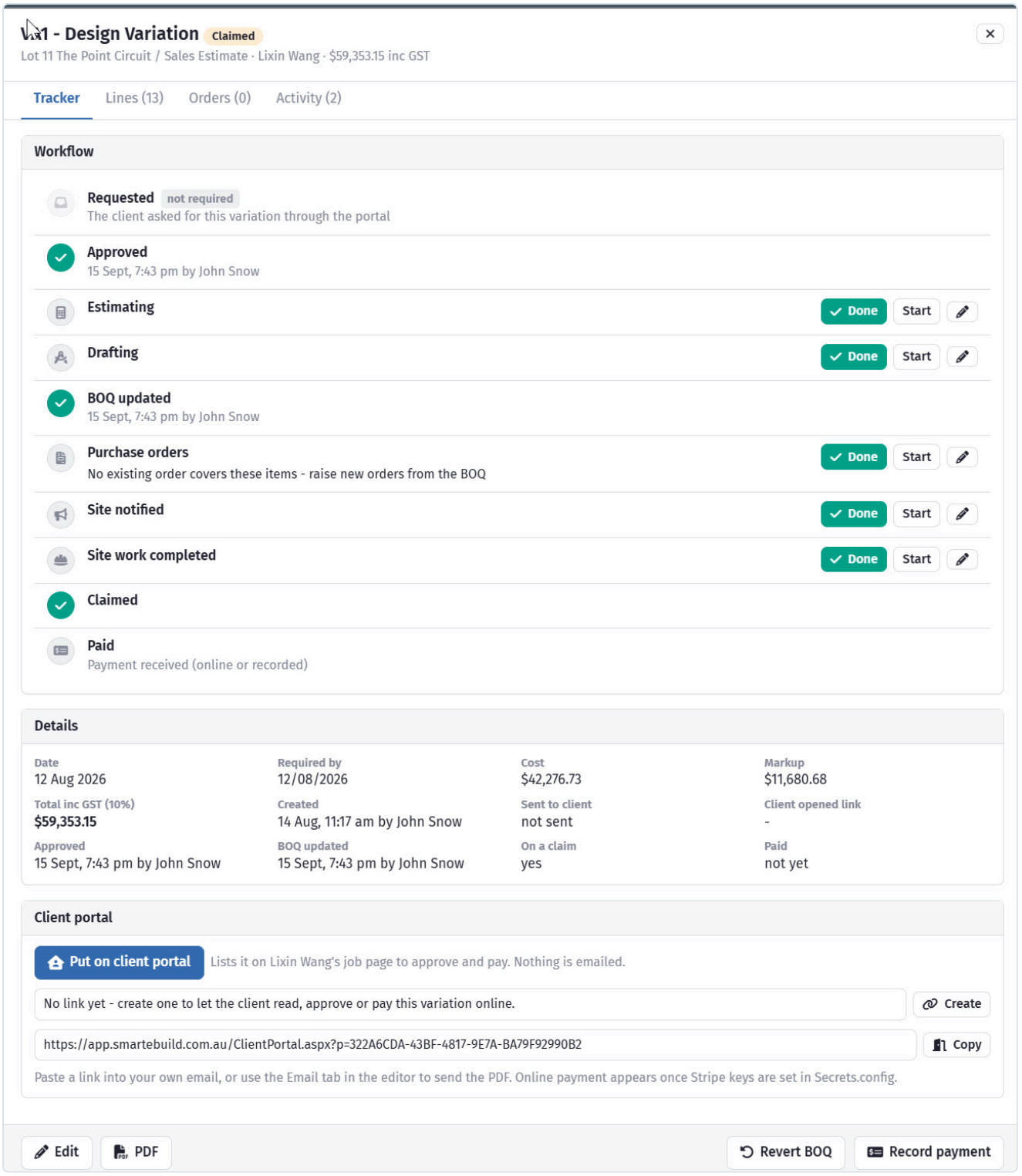
Separately from the variation template above, the **Notes** tab and the **Email** tab each keep their own set of saved wordings. **Save as new** stores what is in the editor, **Load** brings one back, and **Save to**, **Rename** and **Delete** work on your own; the ones marked *(system)* are supplied with SmarteBuild and can be copied but not changed.

Make default sets the wording every NEW variation starts from — one for the note, one for the email. That template then shows as `- default` in the list, and the button becomes **Clear default** when you want new variations to start blank again. It is a setting for the whole company and it does not change variations that already exist. A *(system)* template cannot be the default; save your own copy of one first.

25.3 Getting client approval BUILDER PLAN

Sending a variation to the client, recording their acceptance, and what to do when work has to start before approval arrives.

A variation is only worth what you can prove the client agreed to. Sending it and recording the acceptance is the part that protects you.



The typed name, the time and the device are stored as the signature.

Sending it

The **Email** tab carries **To**, **From**, **CC**, **BCC**, **Subject** and **Message**, and **Attach the variation PDF**, which is ticked for you — leave it on unless the client has asked for the figures in the body of the email instead.

Sending runs in the background. The tab says *"Sending… this refreshes by itself"*, and it does — you do not have to sit on the screen, and pressing send a second time is how clients end up with two copies.

The recipient defaults to the client email on the project — see Clients. Check it is the person who makes decisions. On a couple building a house, send to both.

The variation needs a client, and the client needs an email address, before **Send** will do anything — it tells you which is missing rather than sending. Fix it under the project's clients and send again.

The covering email

Keep it short and make the ask explicit:

> Hi Andrew and Jane,
>
> Attached is variation 04 covering the tapware you selected last week. The contract carried a $1,200 allowance and the fittings you have chosen come to $1,900, so the variation is for the $700 difference plus margin and GST — $862.40 in total.
>
> Could you approve this by Friday? The plumber is on site the following Monday and I would rather not hold him up.

Three things that email does: states what changed, shows the allowance being credited, and gives a deadline with a reason. Vagueness on any of the three is what turns a two-day approval into a three-week one.

> **BCC yourself** — It gives you a copy in your normal mail system, timestamped, outside SmarteBuild. On the rare occasion a client says they never received a variation, that is what settles it.

The client portal

As well as receiving the variation by email, the client can approve it on their **client portal** — the single private page that also carries their documents, selections, claims and photos.

That is usually the faster route to a decision. A client who is already on the page looking at their selections can approve a variation without finding an email, printing anything or replying to the right thread.

Everything below still applies. However the approval arrives, it needs recording and chasing the same way. See Client portal.

Recording acceptance

Accepted by client marks the variation as approved.

Tick it when you have the approval, not when you expect it. An unticked variation is a visible reminder that money is outstanding; one ticked optimistically is invisible and unclaimable evidence of nothing.

Where your contract requires signed approval, keep the signed copy — attach it, or file it — and use the tick to reflect that it exists.

When work has to start first

It happens. The client says go ahead on site, the excavator is idling, and the paperwork has not caught up.

Do this, in order:

1. **Raise the variation the same day**, even if it is an estimate.
2. **Email it immediately**, and say the work is proceeding on their verbal instruction.

3. **Ask for written confirmation** — even a one-line reply is enough.
4. **Update it** with the final cost once known.

The email in step two is the point. It converts a verbal instruction into a written record with a timestamp, sent by you, that they did not dispute. That is a far stronger position than a memory of a conversation on site.

> **A verbal instruction plus your own note is not enough** — The note has to have been **sent to the client** at the time. An internal record written the same day proves what you believed; an email proves what they were told and did not correct.

Chasing approvals

Unapproved variations are money you have possibly spent and definitely cannot claim. Review them at every progress claim:

- Anything unapproved and older than a fortnight gets chased.
- Anything unapproved where the work is **already built** gets chased urgently.
- Anything the client has refused gets resolved, not left open.

The variations list filters by acceptance, so this is one filter and a look. See The variations list.

Bank account details

Variations carry **Bank Account** details for payment, the same as claims.

Set this once and check it appears correctly on the first variation you issue. It is the sort of field that is wrong quietly for months, and the symptom is a client who says they paid.

Approving online

Instead of waiting for a reply to the email, give the client a link. On the variation's tracker (**Tracker** button on the Variations page, or *Open in tracker* on the variation's menu) the **Client links** panel has **Create** next to the client link. Copy it into your email, or send it from your phone.

The client sees the variation laid out for them: the lines, the totals, the extension of time, a **Download the PDF** link, and an **Approve** box. They type their full name, tick that they have read it, and approve. That typed name, the time and the address of the device they used are stored on the variation as the signature, and the variation locks itself the same way a ticked *Approved* does here.

You are told two ways: the bell at the top of every page gets a *Variation approved online* entry, and the variation's **Activity** tab in the tracker records who approved it and when.

If the client has questions instead, **I have questions / decline** sends their note back to you. The variation stays open, the tracker shows it as *Declined* with their reason, and the same link still works once you have revised it and they are ready to approve.

Online approval does not change the estimate by itself. Someone with the *Apply Variations to BOQ and Orders* permission presses **Apply to BOQ** on the tracker, so the estimator sees the change before it lands. See Applying a variation to the BOQ.

25.4 How variations affect the job BUILDER PLAN

What changes when a variation is approved - the contract sum, what each stage is worth, your orders, and the programme.

An approved variation is not just an extra invoice. It changes the contract, and four things move with it.

1. The contract sum

The variation value is added to (or deducted from) the contract price.

That matters more than it sounds, because progress claims are **percentages of the contract sum**. See Contract stages.

Worked example

The Hendricks contract at $221,380, with two approved variations:

	Value
Original contract	$221,380
VO 04 — tapware above PC allowance	+$862
VO 05 — delete rear deck	−$7,381
Revised contract sum	**$214,861**

Now look at what that does to a stage claim. Fixing is 25% of the contract:

	Claim at fixing
On the original contract	$55,345
On the revised contract	$53,715

A $1,630 difference on one stage, from two variations. Claiming against the original figure over-claims; not raising the credit at all would have over-claimed by more. Both are the kind of error that surfaces at the final claim, when it is least convenient.

2. What you can claim

Approved variations become claimable. Depending on your contract, either as part of the next progress claim, or separately.

Unapproved variations are not claimable. That is the practical reason to chase approvals — see Getting client approval.

3. Your orders

A variation that changes the work usually changes what you need to buy.

Variation	Order consequence
Client upgrades the tapware	Revise or replace the plumbing order
Client deletes the deck	Void the decking order
Rock in the excavation	New order for rock removal
Design change to the roof	Void the old order, raise a new one

Nothing does this automatically. The variation handles the client side; the supplier side is a separate action, and forgetting it is how you end up paying for a deck you credited.

> **Two sides to every change** — A variation is the **client** side of a change. The **supplier** side is an order. Raising one without the other leaves your committed cost wrong in one direction or the other — and a credit variation with no voided order means you have paid for something you are no longer being paid for.

4. The programme

Extension of time (days) on the variation extends the contract completion date.

Claim it at the time. An extension cannot sensibly be claimed after the completion date has passed, and a builder who has claimed the money but not the time has accepted the original date for a larger scope.

What to do when a variation is approved

A five-point checklist:

1. Tick **Accepted by client**.
2. Check the revised contract sum is what you expect.
3. Raise, revise or void the affected purchase orders.
4. Confirm the extension of time is recorded.
5. Add the work to the schedule, if it is significant.

Steps three and five are the ones that get missed under pressure, and they are the ones that cost money.

Variations and the estimate

Variations do not change the original Bill of Quantities — the estimate stays as a record of what was priced at contract.

If you want the BOQ to reflect the current scope, add items for the varied work. Most builders do not, preferring to keep the contract estimate clean and read the variations alongside it. Either is defensible; be consistent, because mixing the two approaches on one job makes the cost reports very hard to read.

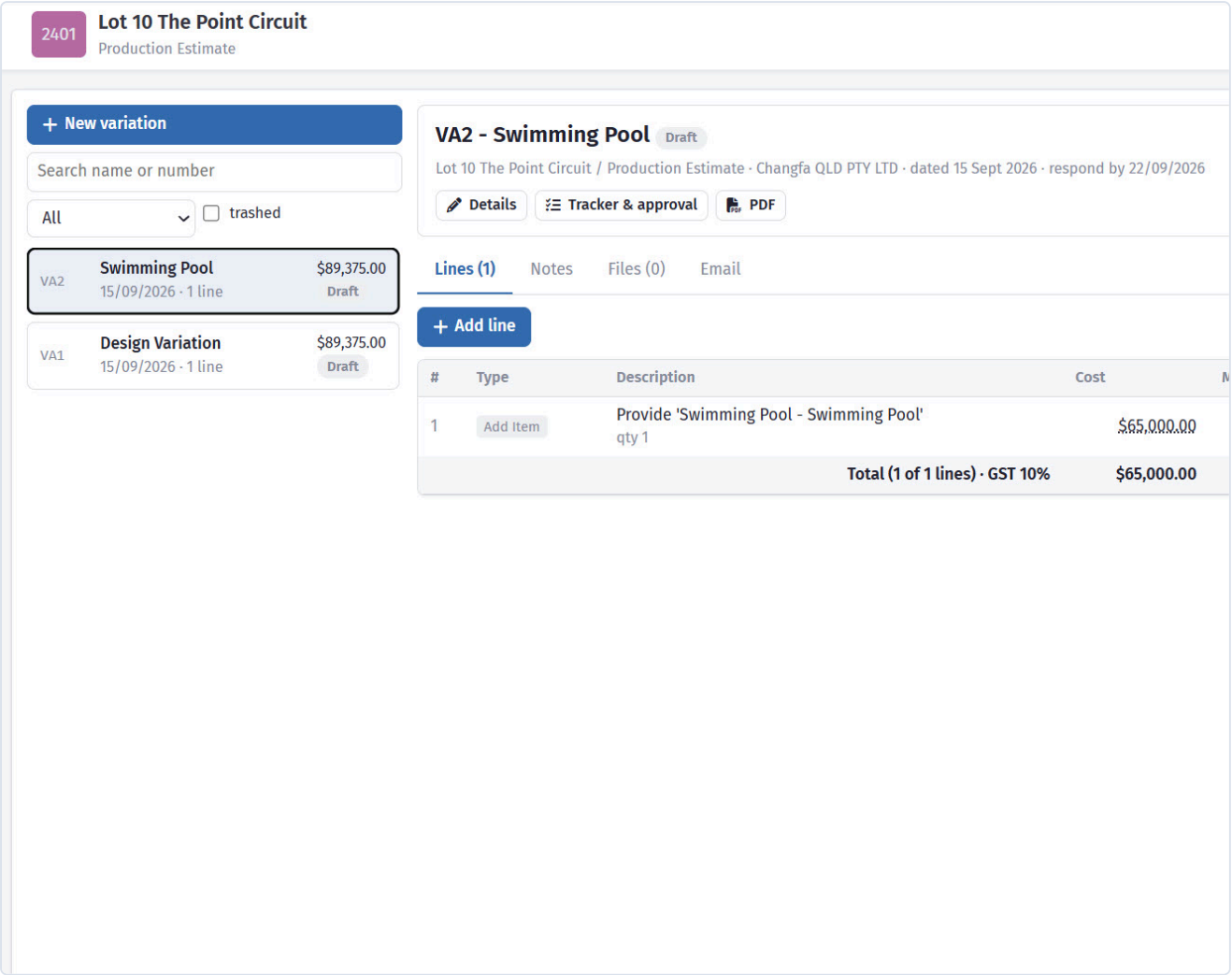
25.5 The variations list BUILDER PLAN

Tracking every variation across your jobs, chasing unapproved ones, and producing a variations schedule for

the client.

The **List View** shows every variation across your jobs — number, date, estimate, description, value and whether the client has accepted it.

Reach it from the floating **List View** button on the variations screen.



Every variation, with its status and what it does to the contract.

The filter that matters

Unaccepted variations is the one to look at regularly. Each is money you have possibly already spent and cannot yet claim.

Sort them oldest first and work down. Anything more than a fortnight old needs chasing; anything where the work is already built needs chasing today.

> **Review unapproved variations at every progress claim** — The claim is the natural moment — you are already looking at the money. A variation approved before the claim goes out is money in this claim rather than the next one, or the one after that.

What the list answers

Question	How
"What is outstanding on this job?"	Filter by estimate, filter unaccepted
"What has this client been charged in variations?"	Filter by estimate, total the accepted ones
"How much variation work are we carrying?"	Filter unaccepted across all jobs
"When did we raise that one?"	Sort by date

The third question is the one to ask across the whole business rather than one job. A large total of unapproved variations is working capital you have spent and not invoiced, and it is invisible on any single job.

A variations schedule for the client

Clients ask for a summary of variations, usually near the end and usually when they are looking at the final claim.

Produce it from the list, filtered to the estimate:

No.	Date	Description	Value
VO 01	12 Jun	Additional power points to living	$486.00
VO 02	28 Jun	Rock excavation to footings	$3,240.00
VO 03	14 Jul	Upgrade to stone benchtops	$2,180.00
VO 04	22 Sep	Tapware above PC allowance	$862.40
VO 05	30 Sep	Delete rear deck	−$7,381.00
		Net variations	**−$612.60**

Running total included. A client seeing variations one at a time over eight months has no sense of the aggregate, and the aggregate is what they will react to at the end. Sending this periodically — with each claim, say — removes the surprise.

Numbering

Number variations sequentially per job, and never reuse a number.

If a variation is withdrawn, leave the number retired rather than reissuing it. A client who has two different documents both called VO 03 will not trust either, and you will spend more time explaining the numbering than the variation.

Exporting

The list exports for reporting and for sending to a client.

Check the columns before sending. A variations schedule for the client should show the value they are being charged — not your cost, your margin, or which subcontractor did the work.

Filters across jobs

Filter EPS and the standard project filters apply here. Filtering to live jobs and grouping by estimate gives you every open variation in the business on one screen, which is the report worth looking at weekly if you run more than a handful of jobs.

25.6 Tracking a variation BUILDER PLAN

The Variations Board follows every variation across your projects from request to payment, with a stage tracker, an activity log and the actions that move it along.

A variation is not finished when the client signs it. Someone has to price it, sometimes redraw it, get it into the estimate, raise or amend the orders, tell the site, see the work done, claim it and get paid. The **Variations Board** is where all of that is tracked, for every job at once.

Open it with the **Tracker** button on the Variations page, or from a variation's menu (**Open in tracker**), which opens that variation's drawer straight away.

The board

The tiles across the top are the numbers that need attention: how many variations are in the current view and what they add up to, how many are waiting for a client's approval, how many are approved but not yet in the BOQ, how many client requests are waiting to be priced, and the approved-but-unpaid total. Click a tile to switch the view.

The list below groups variations by project. Each row shows the status pill, a row of dots for the manual stages (teal done, orange in progress), the stage that is currently active, and when something last happened. Use the view tabs, the project dropdown and the search box to narrow it down; click a column heading to sort.

Status pills, in the order a variation normally moves through them:

Pill	Meaning
Client request	Raised by the client through the portal; not priced yet
Draft	Being prepared; nothing sent
Sent to client	Emailed or shared by link; waiting for a decision
Declined	The client sent back questions or a no; the reason is in the tracker
Approved	Signed off (online or recorded by you), locked for editing
BOQ updated	Approved and applied to the estimate and the orders
Claimed	On a progress claim
Paid	You recorded the client's payment with **Record payment**

The drawer

Click a row to open the variation. Four tabs:

- **Tracker** - the stage timeline, the details, the client links and the files.
- **Lines** - every line with cost, markup, GST and total, and whether it counts toward the total. The tick button excludes a line from the total without deleting it (it still prints); excluded lines are struck through.
- **Orders** - what applying this variation touches: draft orders that will be amended automatically, and sent orders that will need a variation order with the supplier.
- **Activity** - who did what and when: created, shared, viewed by the client, approved, declined, applied to the BOQ, every order line changed, every stage change, every payment.

The buttons along the bottom are the actions: **Edit** (opens the editor for lines, notes, PDF and email), **PDF**, and depending on the state and your permissions **Approve & apply to BOQ**, **Apply to BOQ**, **Revert BOQ**, **Unlock** and **Record payment**.

The stages

Ten stages. Five are **automatic** and follow the record - you cannot tick them by hand, they complete when the thing happens:

Stage	Completes when
Requested	The client raised it through the portal
Approved	Approved online by the client, or recorded by someone with the *Approve Variations* permission
BOQ updated	Applied to the estimate (see Applying a variation to the BOQ)
Claimed	Included on a progress claim
Paid	You have recorded the client's payment with **Record payment**

Five are **manual** and are yours to keep current: **Estimating**, **Drafting**, **Purchase orders**, **Site notified** and **Site work completed**. Each has a status (not required, not started, in progress, completed), can be assigned to one of your users, can carry a due date, and takes a note. **Done** and **Start** are one click; the pencil opens the full form. Marking a stage *not required* is the honest answer for a variation that needs no drawings - it stops the dots looking unfinished.

Applying a variation fills in the *Purchase orders* stage for you when there is something to do: if lines sit on sent orders it goes to *in progress* with a note saying how many need a variation order.

Permissions

Three permissions under the Variations module control the actions, set per user under **Users**:

- **Approve Variations** - record an approval, and unlock an approved variation.
- **Apply Variations to BOQ and Orders** - push an approved variation into the estimate and the draft orders, and revert it.
- **Update Variation Workflow** - change the manual stages and record a payment.

Everyone who had the Variations module when this was introduced was given all three, so nothing changed for existing users until an administrator removes one.

Notifications

The bell at the top of every page picks up three events from the client portal: *Variation approved online*, *Variation requested by client* and *Variation declined by client*. They go to the person who created the variation and to everyone with edit rights on the estimate.

25.7 The client portal BUILDER PLAN

A link per client and job where they can see every variation sent to them, approve one with a typed name, see how to pay you, and ask for a change.

> **The portal grew** — Since September 2026 the client's job link opens the full client portal - documents, selections, claims, photos and messages as well as variations. Old `?p=` links redirect there. This page covers the variation side of it.

There are two kinds of client link, and both are plain web addresses - the client needs no login, no app and no password. The address itself is the key (a long random code), the same way shared colour schedules and call-up confirmations work.

Putting a variation on the portal

A variation is invisible to the client until you say so, so a draft you are still pricing never leaks. On the tracker, the **Client portal** panel has one button: **Put on client portal**. Press it and the variation appears on the client's job page, on the Variations tab, as *awaiting your approval*, where they read it, approve it with a typed name and see how to pay you. Nothing is emailed; the panel turns teal with **Open their page** so you can see what they see. If the client has no portal link yet, the panel says so - invite them from **Project Details > Client portal**.

Sending the variation by email from the editor does the same thing as a side effect, so a variation you have emailed is already on the portal.

The variation link

The button above also issues the variation's own link, which is what the row on the portal opens. You can send that address on its own too: **Copy** next to *Client link*, then paste it into a text or your own email. The client sees:

- the variation laid out plainly: what changes, quantities and amounts on the lines you chose to show, subtotal, GST and total, any extension of time, and your closing note;
- **Download the PDF**;
- an **Approve** box: they type their full name, tick that they have read it, and approve. The typed name, the time and their device's address are stored on the variation as the signature;
- **I have questions / decline**, which sends a note back to you and marks the variation as declined until you revise it;

- once approved, a **Payment** section showing the bank account you chose on the variation — account name, BSB and account number — with the variation number (for example *VA12*) as the reference. If the variation has no bank account, the client is told you will let them know how to pay.

Withdraw (the pink button next to the link) invalidates it; anyone opening the old address sees "this link is no longer valid". Creating again issues a new one.

The first time the client opens the link is recorded, so the tracker can show *viewed 3 Sep* next to a variation that is still waiting - useful before you chase.

The portal link

One link per client per job. Press **Create** next to *Portal link* in the same panel (the variation must have a client). This page lists every variation you have sent to, or shared with, that client on the job, with its status, and has **Request a variation**.

A request is a short title and a description. It arrives as a new variation on the job flagged **Client request**, with the description as a note line and the client's link already attached. You are told through the bell, and the board's *Client requests* tile counts it. Price it in the editor as you would any other variation - add the lines, set the markup - then send or share it, and the same link the client already has now shows the priced version ready to approve.

Nothing is agreed until the client approves the priced variation, and the portal says so.

Getting paid

The client pays you directly, by bank transfer to the account shown on the variation. Pick that account when you create the variation — it is the same list of bank accounts your progress claims use, kept under **Settings** in the Admin panel — and check it before you share, because it is exactly what the client will pay into.

When the money arrives, press **Record payment** on the variation's tracker (needs *Update Variation Workflow*). That completes the *Paid* stage, so the board shows the variation as paid.

What the client cannot do

Change a line, a price or a quantity. Approve a variation twice. Open a variation that has been trashed. The address gives them exactly one variation (or one job's list) and nothing else in your account.

25.8 Applying a variation to the BOQ BUILDER PLAN

What "Apply to BOQ" changes in the estimate and the purchase orders, line type by line type, and how to take it back out.

Until a variation is applied, the estimate does not know about it. The WBS carries the approved variation total as a separate figure, but the items themselves - their quantities, products and whether they are included - still describe the original contract. **Apply to BOQ** is the step that pushes the agreed change into the items, so the budget, the orders and the schedule all carry it.

It needs the *Apply Variations to BOQ and Orders* permission and an approved variation. When the person recording an approval holds both permissions, the tracker's **Approve & apply to BOQ** button does both

in one go. An approval that comes in from the client portal is only recorded - someone applies it deliberately afterwards, from the tracker, so the estimator sees the change land.

What each line type does

Line type	Effect on the BOQ item
Add Item	The item is included with the variation's quantity. If it was already included, its quantity goes up by the variation's quantity (as a manual quantity, so a formula does not undo it)
Remove Item	The item is marked not included
Change Product	The item's selected product becomes the new product. Its quantity only changes if the variation says a different quantity
Change Item	The old item is marked not included; the new item is included at the variation's quantity and product
Note	Nothing - it is text

Lines excluded from the total are left alone, and a line whose item has since been deleted from the estimate is skipped and noted in the log rather than applied. Every item that is changed has its previous state stored on the variation line, which is what makes **Revert** exact.

What happens to purchase orders

- **Draft orders** (not sent) are amended automatically: the line's quantity is re-derived as the item's new BOQ quantity less whatever other orders already carry, a removed item's line is deleted, and a product swap is carried across when the new product is from the order's supplier. Each change is written to the variation's activity log with the order number.
- **Sent orders are never changed.** Each affected line is listed in the log - order number, supplier, what was sent, what changed - and the *Purchase orders* stage is set to *in progress* with a count, so someone raises a variation order with the supplier. The **Orders** tab in the tracker shows the same split before you press the button.
- Items that are on no order at all get a note on the *Purchase orders* stage: raise new orders from the BOQ.

Revert and unlock

Revert BOQ takes the changes back out: every touched item returns to the quantity, product and inclusion it had, the *BOQ updated* stage clears, and the log says so. Draft order lines amended at apply time are **not** restored - the log carries what was changed so they can be put back by hand if that is wanted.

Unlock removes the approval and, if the variation had been applied, reverts it first, so the estimate and the approval never disagree. A variation that sits on an approved (frozen) progress claim cannot be unlocked until that claim is unlocked - the claim is a signed document.

After applying

Open the BOQ or the WBS and the change is there. The WBS's *Variations* column still shows the approved variation totals separately, so a WBS node reads: the original budget, the items as they now stand, and the variation value that explains the difference.

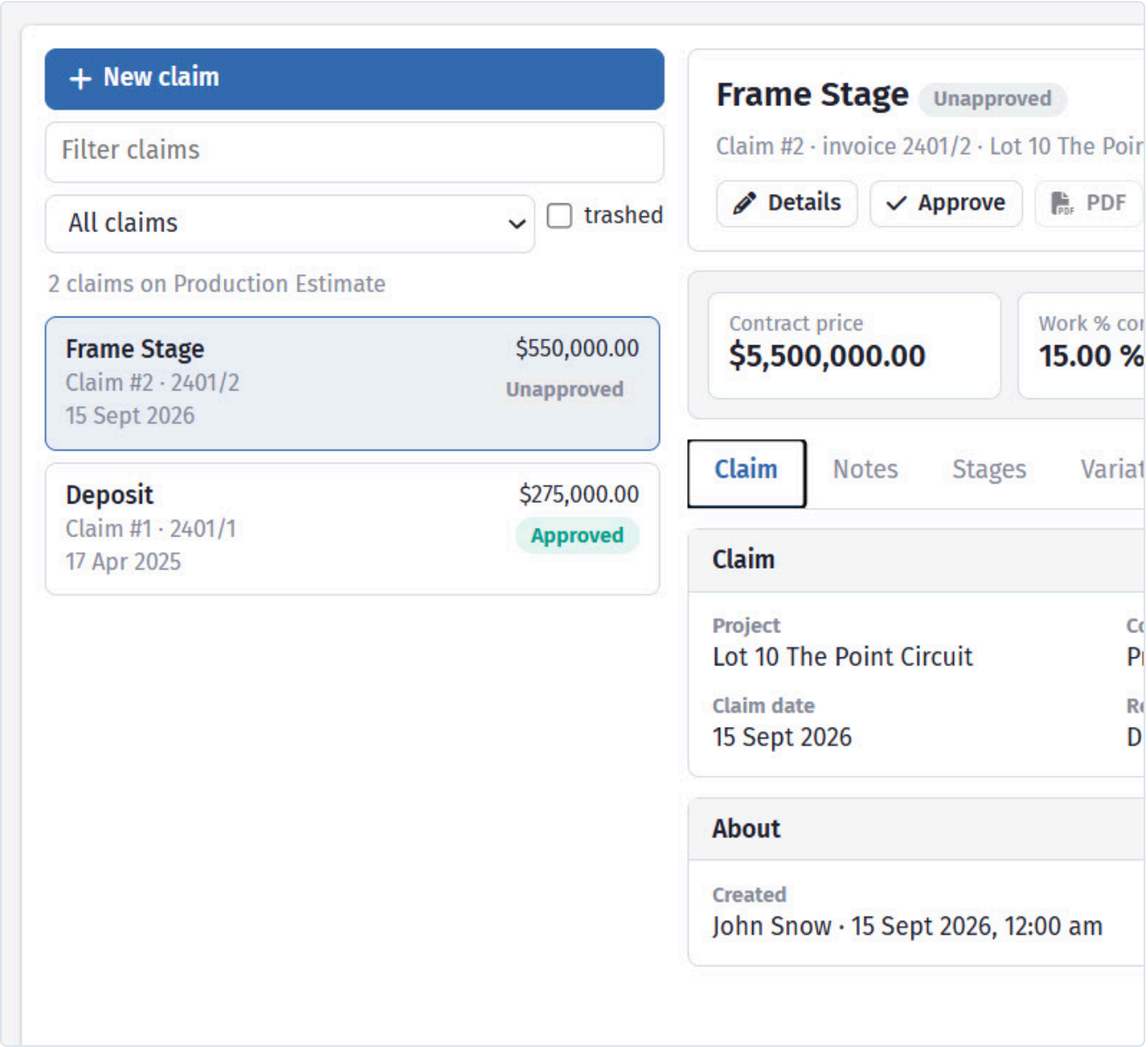
CHAPTER 26

Progress claims

26.1 How progress claims work BUILDER PLAN

Claiming money as the job progresses, what a claim is made against, and the discipline that keeps cash flowing.

A progress claim is how you get paid during a job rather than at the end of it. You claim for the work completed to date, the client pays, and you do it again next stage.



Every claim on the job, and where each one has got to.

What a claim is made against

Two things, and your contract decides which:

Contract stages — deposit, base, frame, lock-up, fixing, completion. Each is a fixed percentage of the contract sum, and you claim a stage when you reach it. This is how most domestic building contracts work.

Percentage complete — you assess how far through the work you are and claim that share. More common on commercial work and cost-plus arrangements.

Either way, the claim is a percentage of the **contract sum** — which is why contract stages and the contract price on the project both have to be set up before claims mean anything.

The life of a claim

1. **Reach a stage**, or assess progress.
2. **Raise the claim** against that stage.
3. **Include any approved variations**.
4. **Issue it** to the client with your invoice number and payment details.
5. **Record acceptance and payment**.

Claim promptly

Claims are the difference between a profitable job and a profitable job that bankrupts you. The work is done and paid for by you — materials, subcontractors, wages — before the client pays for any of it. Every week a claim sits unraised is a week you are financing the client.

> **Raise the claim the day you reach the stage** — Not the end of the month, not when you get around to the paperwork. Most domestic contracts give the client a set number of days to pay from the claim date, so a claim raised nine days late is paid nine days late, and you carried the money in between.

What a claim needs before it will work

Needs	Where it comes from	If missing
Contract price	Project Info	Claim values come out as zero
Contract stages	Edit Stage on the project	Nothing to claim against
Client details	Project Info	Claim goes to the wrong place
Bank account	Set on the claim	Client cannot pay you
Approved variations	Variations module	You under-claim

The first two are the usual cause of a claim that will not produce a sensible number. Check them before assuming something is broken.

Claims and variations

Approved variations change the contract sum, and so change what every remaining stage is worth. Unapproved variations cannot be claimed at all.

This is the practical reason to chase variation approvals — see Including variations.

In this section

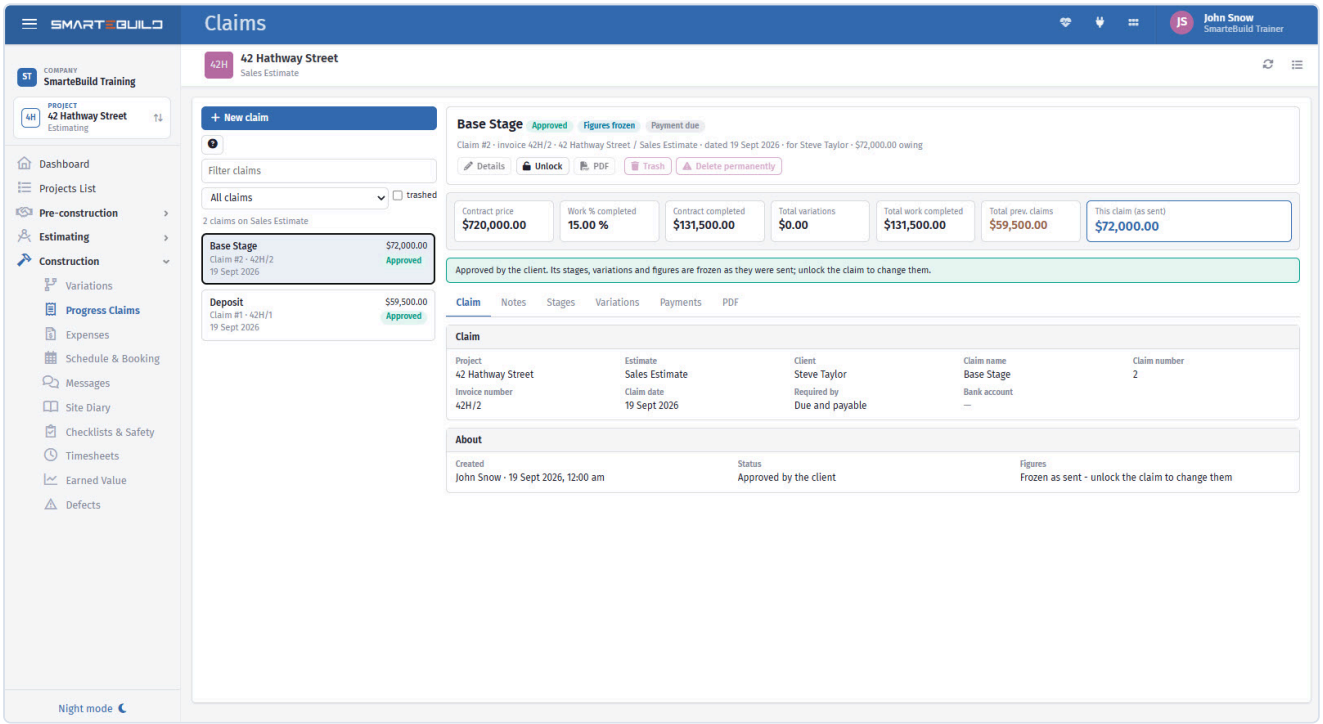
- Raising a claim
- Claiming by percentage complete
- Including variations
- Issuing a claim
- Tracking payment

26.2 Raising a claim BUILDER PLAN

Creating a progress claim against contract stages, with a worked example running through a full domestic contract.

Choose **New claim** on the Claims screen. The claim opens with the contract stages already listed and the headline figures across the top of the pane.

If **New claim** is greyed out, the estimate has no contract stages yet — there is nothing to claim against until they are set up. See Contract stages.



The claim comes off the same contract figure as the estimate.

The figures across the top

Seven numbers sit above the tabs and stay in view as you work:

Figure	What it is
Contract price	The current contract sum
Work % completed	The share of the whole contract this claim reaches
Contract completed	The value of the stages claimed
Total variations	The value of the variations claimed
Total work completed	Stages plus variations
Total prev. claims	The approved claims before this one
This claim value	What the client is being asked for

They move as you edit the stages and variations tabs, so you can see the effect of a change without leaving the claim.

Finding a claim

The list on the left searches on claim name, claim number and invoice number, and filters to **Approved** or **Unapproved**. **Trashed** shows claims that have been put in the bin, which are otherwise hidden.

The fields

Field	What it is
Claim Name	What this claim is called — usually the stage
Claim number	Sequential, per job
Claim Date	The date of the claim, which usually starts the payment clock
Client	From the project
Contract Price	The current contract sum, including approved variations
Invoice number	Your invoice reference
Bank account	Payment details printed on the claim

Claim date and **claim number** are both required, and the number must be greater than zero — it decides which earlier claims count as previous claims, so a claim without one bills the wrong amount. If another live claim on the estimate already uses that number, the claim still saves but warns you, because two claims sharing a number make "previous claims" ambiguous.

Every contract stage is copied onto the claim when it is created, carrying forward what the last claim billed, so there is nothing to add by hand. If the contract stages themselves change afterwards, **Reset stage values** on the Stages tab re-reads them.

Approval freezes the claim

Until it is approved, a claim is live: change a contract stage, the contract price or a variation and the claim follows. Tick **Approved by client** and it stops — every figure on it is stored as it stands and never recalculated, however the job changes afterwards. That is what makes the claim usable as the record of what was agreed.

Unlock thaws it. The figures follow the job again until it is approved once more, so unlock only when the client has agreed to a changed claim, not to tidy up a number after the fact.

While a claim is approved, everything on it is read-only: the details, the stages, the variations and the note. Trash and **Delete permanently** are refused too — an approved claim counts towards every later claim's "previous claims", so removing one quietly increases what the next claim bills.

Previous claims are the approved ones only. A claim that was trashed, or never approved, does not reduce the next one.

Claiming a stage

On the **Stages** tab, each contract stage has a **Claim %** — how much of that stage this claim bills, from 0 to 100. Set the stage you have reached to 100.

The edit box shows what the percentage is worth as you type, so you can see the money before you save it rather than after.

The footer totals the grid. Read **Claim %** there carefully: it is the share of the *whole contract* claimed, not the sum of the per-stage percentages — a job at deposit, base and frame reads 40%, not 240%.

Claims are cumulative against the contract: each one claims the stages reached since the last, and the running total tells you and the client how much of the contract has been claimed to date.

Worked example: the Hendricks contract

Contract sum $221,380, with the standard stages:

Stage	%	Value
Deposit	5%	$11,069
Base	10%	$22,138
Frame	15%	$33,207
Lock-up	35%	$77,483
Fixing	25%	$55,345
Completion	10%	$22,138

The job reaches frame stage. Claim 3:

Claim name	`Frame`
Claim number	3
This claim — frame stage, 15%	$33,207
Previously claimed (deposit + base)	$33,207
Total claimed to date	**$66,414**
Contract remaining	$154,966

The client can see where they are against the contract, which is what stops the "how much have we paid so far?" conversation happening by email every month.

> **Claim the stage you have actually reached** — Claiming frame when the frame is up but not braced, or lock-up when two windows are still to arrive, is how disputes start. Most contracts define these stages precisely. Claiming a stage you have not completed gives the client a reason not to pay any of it — including the part you did finish.

Claim numbering

Number sequentially per job, starting at 1, and never reuse a number.

If a claim is withdrawn and reissued, use the next number and reference the one it replaces. Two documents both called Claim 4 is the kind of thing that gets a whole account queried.

Note templates

The templates on the **Notes** tab are for the claim's **note** — the wording that prints on the claim — not for its stages or figures. Those come from the contract.

Load puts a template's text into the note, **Save to** writes the note back over the selected template, **Save as new** makes a new one from what is in the note, and **Rename** and **Delete** do what they say.

Templates marked *(SmarteBuild)* are the ones supplied with the system. They can be loaded and copied but not changed, renamed or deleted — use **Save as new** to make your own version.

Make default sets the template every NEW claim note starts from - that template then shows as `· default` in the list, and the button becomes **Clear default** when you want new claims to start blank again. It is a setting for the whole company, and it does not touch claims that already exist. SmarteBuild's own templates cannot be the default; save your own copy of one first.

Worth setting up if you issue the same wording every month: standard payment terms, what the claim covers, what happens next.

Contract price must be current

The **Contract Price** on the claim should include every approved variation. If it does not, every stage percentage is calculated on the wrong base and every claim from here is wrong by the same proportion.

Check it against your variations before raising a claim. See How variations affect the job.

Before you send

1. The **stage is genuinely complete**.
2. The **contract price** includes approved variations.
3. The **claim number** follows the last one.
4. **Approved variations** are included — see Including variations.
5. The **bank account** details are right.

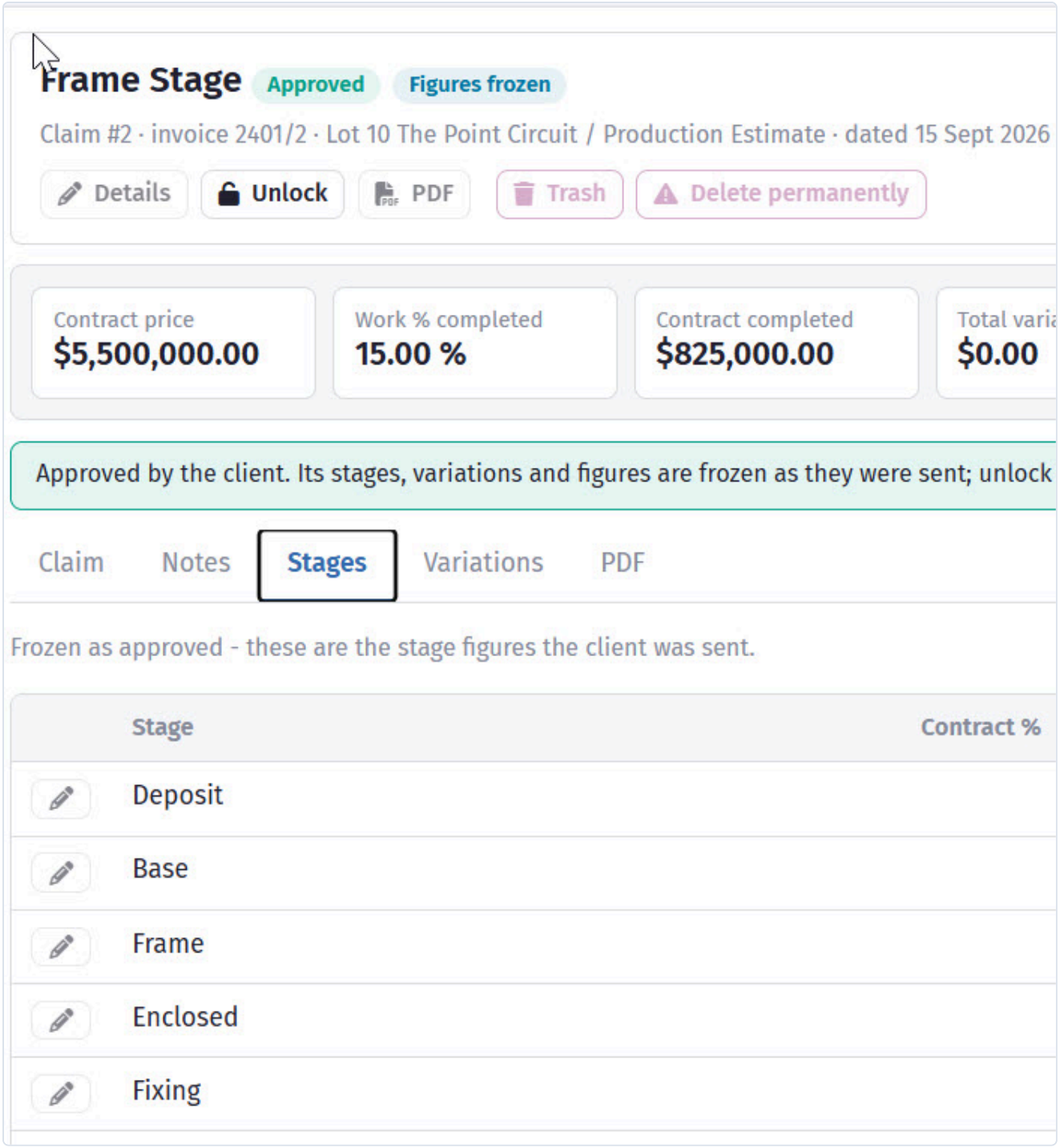
Then issue it.

26.3 Claiming by percentage complete BUILDER PLAN

Claiming a share of the contract based on assessed progress rather than fixed stages, and how to assess it defensibly.

Not every contract pays on fixed stages. Where yours claims on **percentage complete**, you assess how far through the work you are and claim that share of the contract.

Contract completed at the top of the claim is not somewhere you type — it is calculated from the stages. You enter your assessment on the **Stages** tab, as the **Claim %** against each stage, and the figures above follow.



Assess each stage and the claim follows the assessment.

When you would use it

Contract type	Usually claims on
Domestic fixed-price	Stages
Commercial	Percentage complete
Cost-plus	Actual cost, reported periodically
Small works	Either, often a deposit and a final

Assessing the percentage honestly

The temptation is to claim what your cash flow needs. The discipline is to claim what is built.

Two ways to assess it defensibly:

By value of work complete. Go through the trades and work out what proportion of each is done, weighted by its value in the bill. Slower, and far harder to argue with, because it comes from your own contract pricing.

By cost to date. Compare actual cost against total estimated cost. Quick, and reasonable when the job is running to budget — but it flatters you when you are overspending, because the overspend reads as progress.

> **Cost to date is not the same as progress** — If you have spent 60% of the budget but only 45% of the work is built, you are 45% complete and 15% over. Claiming 60% invites a rejection and, on a contract with a superintendent, an assessment you will not like.

Worked example

The Hendricks job on a percentage-complete contract, assessed by value:

Trade	Value	Complete	Earned
Preliminaries	$12,400	70%	$8,680
Site works	$8,900	100%	$8,900
Concrete	$9,784	100%	$9,784
Framing	$34,200	100%	$34,200
Roofing	$18,600	100%	$18,600
External cladding	$22,100	60%	$13,260
Windows and doors	$16,800	100%	$16,800
Services	$28,400	40%	$11,360
Internal linings	$19,200	0%	$0
Fixing and joinery	$24,600	0%	$0
Painting	$11,200	0%	$0
Final clean	$2,400	0%	$0
Total	**$208,584**		**$121,584**

That is **58.3%** complete.

To claim it, set the **Claim %** on the Stages tab so the stages add up to 58.3% of the contract — the footer's **Claim %** is the share of the whole contract, so it is the number to watch. **This claim value** at the top then shows 58.3% of the contract sum less what has already been claimed.

Where your contract stages are coarser than your assessment, the usual approach is to part-claim the stage you are inside: with base and frame complete and lock-up one-third built, that is lock-up at 33%, not a stage ticked or left.

Note preliminaries at 70% rather than a share of elapsed time. Prelims are largely front-loaded — site establishment, fencing, temporary services — so they run ahead of the build, and claiming them by calendar time under-claims early.

Keep your working

Whatever method you use, keep the assessment. Percentage claims get queried far more often than stage claims, because the number is a judgement rather than a fact.

A table like the one above answers the query in one email. "It felt like about 60%" does not.

Mixing stages and percentages

Some contracts do both — stages for the base building, percentage for a variation works package.

SmarteBuild will let you claim either way. Be explicit on the claim about which is which, so the client can follow it. A claim that mixes the two without saying so reads as an error even when it is right.

The final claim

The last claim brings the total to 100% of the contract sum including approved variations.

Check it closes out exactly. If your claims to date plus this one do not equal the contract sum, something earlier was over- or under-claimed, and the final claim is where it surfaces — usually in front of a client who is already looking closely.

26.4 Including variations BUILDER PLAN

Getting approved variations into a claim, why unapproved ones cannot be claimed, and how variations change every remaining stage.

Approved variations are claimable. Unapproved ones are not. That single distinction is why variation discipline and cash flow are the same subject.

Two effects, not one

A variation does two things to your claims, and it is easy to account for only the first.

It is claimable itself. The variation value can be claimed, either within the next progress claim or separately, depending on your contract.

It changes the contract sum, and so changes what every remaining stage is worth.

Worked example

The Hendricks contract at $221,380, with two approved variations before the fixing claim:

	Value
Original contract	$221,380
VO 04 — tapware above PC allowance	+$862
VO 05 — delete rear deck	−$7,381
Revised contract sum	**$214,861**

Fixing is 25%:

Claiming on	Fixing claim
Original contract sum	$55,345
Revised contract sum	$53,715

Claiming $55,345 over-claims by $1,630. On a contract where the client's lender checks the figures, that gets the whole claim held up rather than the difference adjusted.

And note the direction: the credit variation *reduces* what you can claim. Builders who diligently add their variations but forget their credits over-claim consistently, and the correction lands at the final claim.

Getting them in

1. Check every variation you intend to claim is marked **Accepted by client**.
2. Confirm the **Contract Price** on the claim reflects the revised sum.
3. Include the variations according to your contract — within the stage claim, or as separate lines.

Where you list variations separately on the claim, show each with its number and a short description. A client reconciling the claim against the variations they signed should be able to do it without ringing you.

On the claim's Variations tab

Add variation picks one accepted variation and asks how much of it is complete, as a percentage. **Add all** puts every accepted variation not yet on the claim in at one percentage — the usual choice when everything approved so far is done.

A new claim starts each variation at the percentage the previous claim billed, the same way the contract stages carry forward, so you only edit what has moved.

Reset variation values re-reads each variation's value from the variation itself. Use it after a variation is changed once it is already on the claim.

Each row also has a **remove**, and **Remove all** clears the tab — useful when a claim was set up to bill variations and the client has since asked for them separately.

Only accepted variations on this estimate can be added, and only ones not already on the claim, so the picker never offers something that would double-bill. Once the claim is approved the whole tab is read-only, like the rest of it.

Unapproved variations

They cannot be claimed. That is not a limitation of the software — it is that you have no agreed price for the work.

If the work is built and the variation is unapproved, you are carrying the cost with no way to invoice it. This is the most expensive routine mistake in running a job, and the fix is entirely procedural: raise variations the day the change is asked for, and chase the approvals before the work happens.

> **Review unapproved variations at every claim** — The claim is when you are already looking at the money. Anything unapproved and already built needs chasing that day. See The variations list.

Sending a variations summary with the claim

Worth doing as a habit: attach a running variations schedule to each claim.

No.	Description	Value
VO 01	Additional power points to living	$486.00
VO 02	Rock excavation to footings	$3,240.00
VO 03	Upgrade to stone benchtops	$2,180.00
VO 04	Tapware above PC allowance	$862.40
VO 05	Delete rear deck	−$7,381.00
	Net variations to date	**−$612.60**

Clients react to the aggregate, and they only ever see the aggregate at the end unless you show it to them along the way. Sending it with each claim turns a potential end-of-job argument into five small conversations that already happened.

The final claim

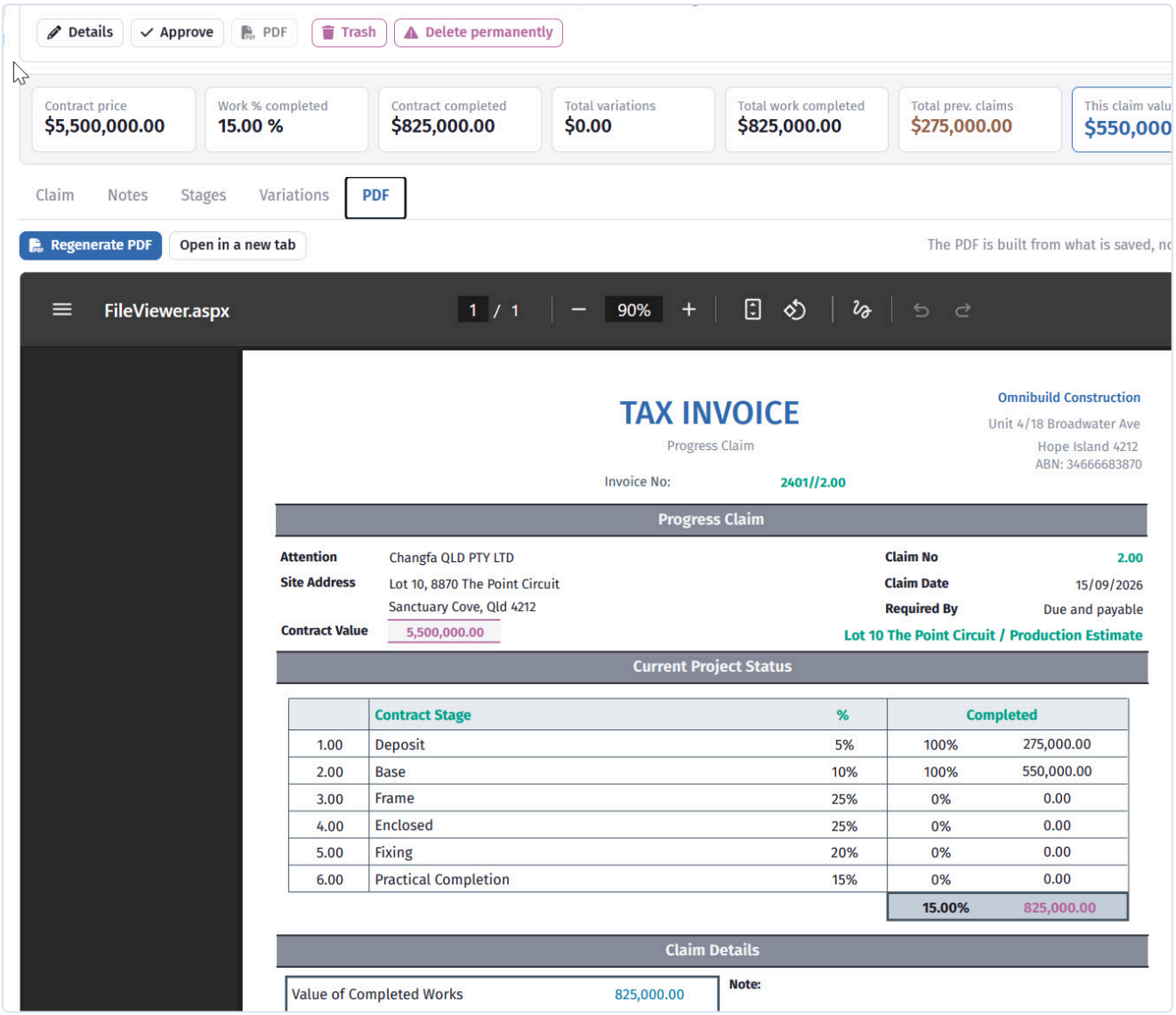
The final claim brings total claims to the contract sum **including approved variations**.

If it does not close out exactly, work backwards through the claims and the variations until you find where the two diverged. It is nearly always a variation approved between two claims that was added to one but not carried into the contract sum for the next.

26.5 Issuing a claim BUILDER PLAN

Invoice numbers, bank details, sending the claim to the client, and what to check before it goes.

A claim only starts the payment clock once it is properly issued. Getting the details right is the difference between being paid in fourteen days and having the claim bounced back on a technicality.



What the client receives, with the bank details and the due date on it.

Invoice number

Invoice number is your accounting reference for the claim.

Whatever convention you use, keep it consistent and traceable back to the job — many builders use the job code plus the claim number, so `2026-041-03` is the third claim on the Hendricks job. Your bookkeeper will thank you, and so will you when a client pays an amount that matches nothing obvious.

Bank account details

Bank Account and **Bank account detail** print the payment details on the claim.

Set it and check the first claim you issue carries the right numbers. This is the classic field that is quietly wrong for months — the symptom is a client insisting they paid while your account shows nothing.

> **Verify bank details on the document, not just in the field** — Look at the produced claim before the first one goes out, and confirm the account number as printed. Payment redirection fraud targets exactly this document, so it is worth your client knowing that your details never change mid-job.

Producing the document

The **PDF** tab builds the claim document. **Generate PDF** the first time, **Regenerate PDF** whenever the claim changes, and the result appears in the viewer with **Open in a new tab** beside it.

The PDF is built from what is **saved**. If you have edited the note and not saved it, the Notes tab says *Unsaved changes* — save it before you generate, or the document prints the previous wording.

An approved claim can still be regenerated. Re-printing what the client was sent is exactly what an approved claim is for.

Sending

SmarteBuild does not email the claim for you. Download or open the PDF and send it from your own email, which is also what lets you write the covering note below and attach the variations schedule with it.

The claim does appear on the client's **portal**, under Claims, so they can find it later without going back through their email. That removes the most common administrative call on a job — *"can you send me that claim again?"* See Client portal.

Check who you are sending to — on a couple, send to both; on a company, the accounts address as well as the contact.

Where a lender or a superintendent has to certify the claim, they go on the distribution too. A claim that reaches the client but not their bank does not get paid.

The covering email

> Hi Andrew and Jane,
>
> Attached is progress claim 3, for the frame stage, which was completed on Wednesday and inspected Thursday.
>
> Claim: $33,207.00 including GST Total claimed to date: $66,414.00 of the $221,380.00 contract Payment due: 14 days from today
>
> Also attached is the variations schedule to date. Please let me know if anything needs clarifying.

It states the stage, the amount, the running total and the due date. A client who has that does not need to ring, and their lender has what it needs to release funds.

What to check before it goes

1. **The stage is genuinely complete**, and inspected if the contract requires it.
2. **The contract price** includes every approved variation.
3. **The claim number** follows the last one.
4. **Approved variations** are included, and credits as well as additions.
5. **The bank details** are correct on the produced document.
6. **The total claimed to date** matches your records.

Sixty seconds, and it avoids the most common reasons a claim is rejected.

Attachments worth sending

- The **variations schedule** to date — see Including variations.
- Any **inspection certificate** the stage required.
- Photographs, where the stage is not otherwise evidenced.

The photographs matter more than they sound on jobs where the client is not local. A frame-stage claim with four photographs of the frame is paid faster than one without.

If a claim is disputed

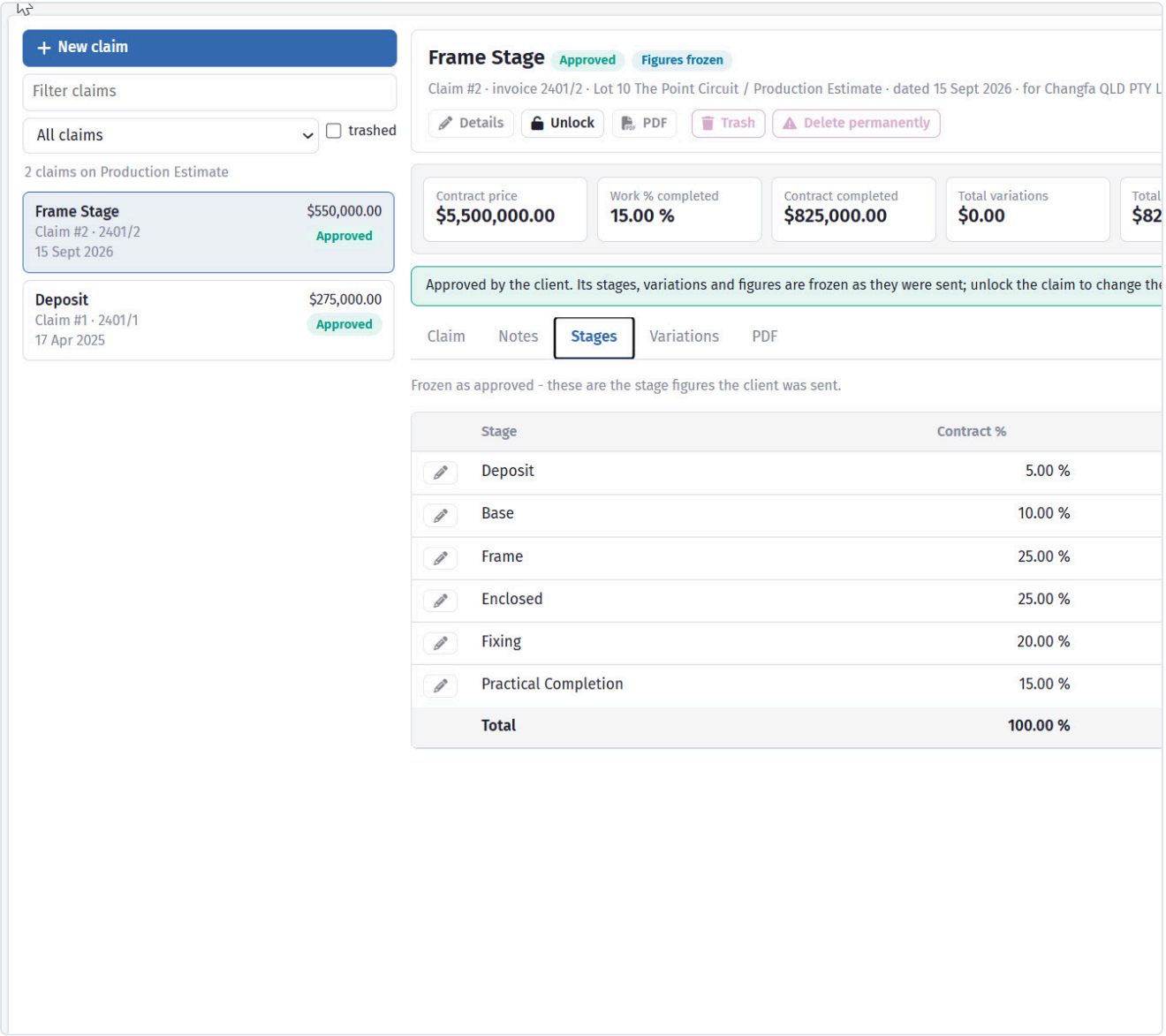
Deal with it in writing and quickly. Most contracts have a defined period for the client to respond to a claim, and both of you are better off with the disagreement recorded inside that window.

Do not reissue a claim under the same number. Withdraw it, resolve the dispute, and issue the next number referencing what it replaces.

26.6 Tracking payment BUILDER PLAN

Recording client acceptance, watching what is outstanding across every job, and chasing late payment.

Issuing a claim is half the job. The other half is knowing which claims are outstanding, across every job, without going looking.



Claimed, paid and outstanding, so you know what is late.

Recording acceptance

Client accepted this Claim marks the claim as agreed.

Tick it when the client has actually accepted — not when you sent it and not when you expect them to. An unticked claim is a visible prompt; one ticked hopefully is a claim you stop chasing for no reason.

Recording payment

Accepted is not paid, and the claim shows the two separately: one pill for whether the client has approved it, a second for whether the money has arrived.

The **Payments** tab on the claim is where money received goes in. **Record a payment** asks for:

Field	What it is
Date received	The day the money landed in your account
Amount	Pre-filled with what is still owing on the claim
How it was paid	Bank transfer, cheque, cash, card — or type your own
Reference	The bank reference or cheque number
Note	Anything worth remembering

The **reference** is the field that earns its keep. In three months, reconciling a statement, it is what tells you which line is this claim.

A claim can be **part paid**: record what arrived, and the tab shows what is left. Record the rest when it comes and the claim turns to **Paid** on its own.

> **You can record a payment on an approved claim** — Every other part of a claim locks once it is approved — the stages, the variations, the figures. Payments do not, and that is deliberate: a claim is approved, sent, and *then* paid. Approving locks what you billed, not what has come in against it.

Overpayments are allowed, and flagged

If a payment takes the claim past what it is worth, it is recorded anyway and you get a note saying by how much. Clients round up, and one transfer sometimes covers two claims. The software does not pretend that cannot happen — but it does tell you, because the usual cause is a payment logged against the wrong claim.

The client sees the same thing

Whatever you record here shows on the client's portal against the same claim: paid, part paid or due. There is one set of numbers, so you and the client cannot end up reading different states of the same claim.

Payments not tied to a claim

If the Payments tab shows **payments on this job not tied to a claim**, those were recorded against the job before payments named a claim. They still count towards what the client has paid overall, but not towards any one claim, so the claim they belong to still reads as owing.

Use **Assign** on each to put it against the right claim. Nothing guessed at them for you on purpose — deciding where your own money went is not something software should do quietly.

The claims list

The **List View** shows every claim across your jobs: number, date, estimate, value, and whether it has been accepted.

Reach it from the floating **List View** button.

Question	How
"What is outstanding right now?"	Open each claim's Payments tab, or filter unaccepted
"What has this client been claimed?"	Filter by estimate
"What did we invoice last month?"	Filter by claim date
"Which jobs are behind on claiming?"	Group by estimate, look at the latest claim date

That last one is worth doing monthly. A job whose most recent claim is two months old is either finished or is not being claimed — and the second is far more common than anyone expects.

Chasing

The sequence that works:

1. **Two days before due** — a short reminder that payment falls due Friday.
2. **The day after due** — a note that it is now outstanding, with the claim reattached.
3. **A week overdue** — a phone call, followed by an email recording what was said.
4. **Beyond that** — whatever your contract provides for.

> **The two-days-before note is the one that works** — Most late payment is not refusal, it is that nobody actioned it. A short reminder before the due date converts far more claims than any number of chasing emails afterwards, and it does not damage the relationship.

Keeping the record

Record every chase — a note on the claim, or an email you have a copy of.

If a claim ever goes to adjudication or a tribunal, the question is what was claimed and when, and what the client said in response. A file that answers that in order is worth a great deal; a memory of some phone calls is not.

Watching cash across the business

Two numbers are worth knowing at any moment:

- **Claimed and unpaid** — money you have invoiced and not received.
- **Built and unclaimed** — work you have completed and not yet invoiced.

The first comes from the claims list, filtered to unaccepted. The second is the dangerous one, because it is invisible: it is jobs that have passed a stage without anyone raising the claim, plus approved variations not yet included in a claim, plus unapproved variations where the work is already built.

A monthly review of the claims list grouped by estimate surfaces the first part. Reviewing the variations list surfaces the rest.

When a claim is not paid

If a claim goes properly overdue, deal with it under your contract rather than by continuing to build. Every week of unpaid work increases what you are carrying, and a builder who keeps going while unpaid has

usually lost the leverage to stop later.

That is a commercial and legal decision rather than a software one — but the record you need to make it is in the claims list.

CHAPTER 27

Expenses

27.1 How expenses work BUILDER PLAN

Recording what suppliers actually charge you, and why an expense is only useful when it points at an order and a cost code.

An expense is a supplier invoice — what you were actually charged, as opposed to what you allowed in the estimate or committed in an order.

It is the third of the three cost numbers, and the one that closes the loop.

Number	From	Question
Allowed	The BOQ	What did I price?
Committed	Purchase orders	What did I promise to pay?
Actual	**Expenses**	**What was I charged?**

Why record them here as well as in your accounting system

Because your accounting system knows what you spent, and this knows what you spent **it on**.

An invoice in Xero coded to "Materials" tells you the business bought $4,612 of materials. The same invoice recorded against the concrete item on the Hendricks job tells you the slab cost $362 more than the order, which is a number you can act on.

Both are worth having, which is why expenses can be exported to Xero rather than entered twice.

Point every expense at something

An expense is only useful if it points at:

- **An estimate** — which job it belongs to
- **An order**, where one exists — so committed and actual can be compared
- **Items or cost codes** — so the cost lands in the right trade

An expense floating loose against a job still adds to the total, but tells you nothing about where the money went, and will not show up as an overrun against anything.

> **Match to the order wherever there is one** — It is the matching that produces the useful number. An invoice recorded against a job costs you the data entry and gives you a total; an invoice matched to its order gives you the variance, which is the thing worth knowing.

The life of an expense

1. **The invoice arrives** from the supplier.

2. **Record it**, against the estimate, matched to its order.
3. **Check it against the order** — quantity, rate, total.
4. **Query anything that does not match** before it is paid.
5. **Export to Xero** for payment and the books.
6. **Watch it come back** — once exported, SmarteBuild reads the bill's status from Xero, so paid, part paid and voided all show here without you checking twice.

Step four is the whole reason to do this promptly. Once an invoice is paid you are asking for a credit; before it is paid you are asking a question.

Generating an expense from an order

Generate Invoice on a purchase order creates the expense from the order — supplier, items, quantities and values already filled in.

This is the fastest route and the one that guarantees the match. Use it, then adjust anything the supplier actually charged differently, so the variance is explicit rather than buried.

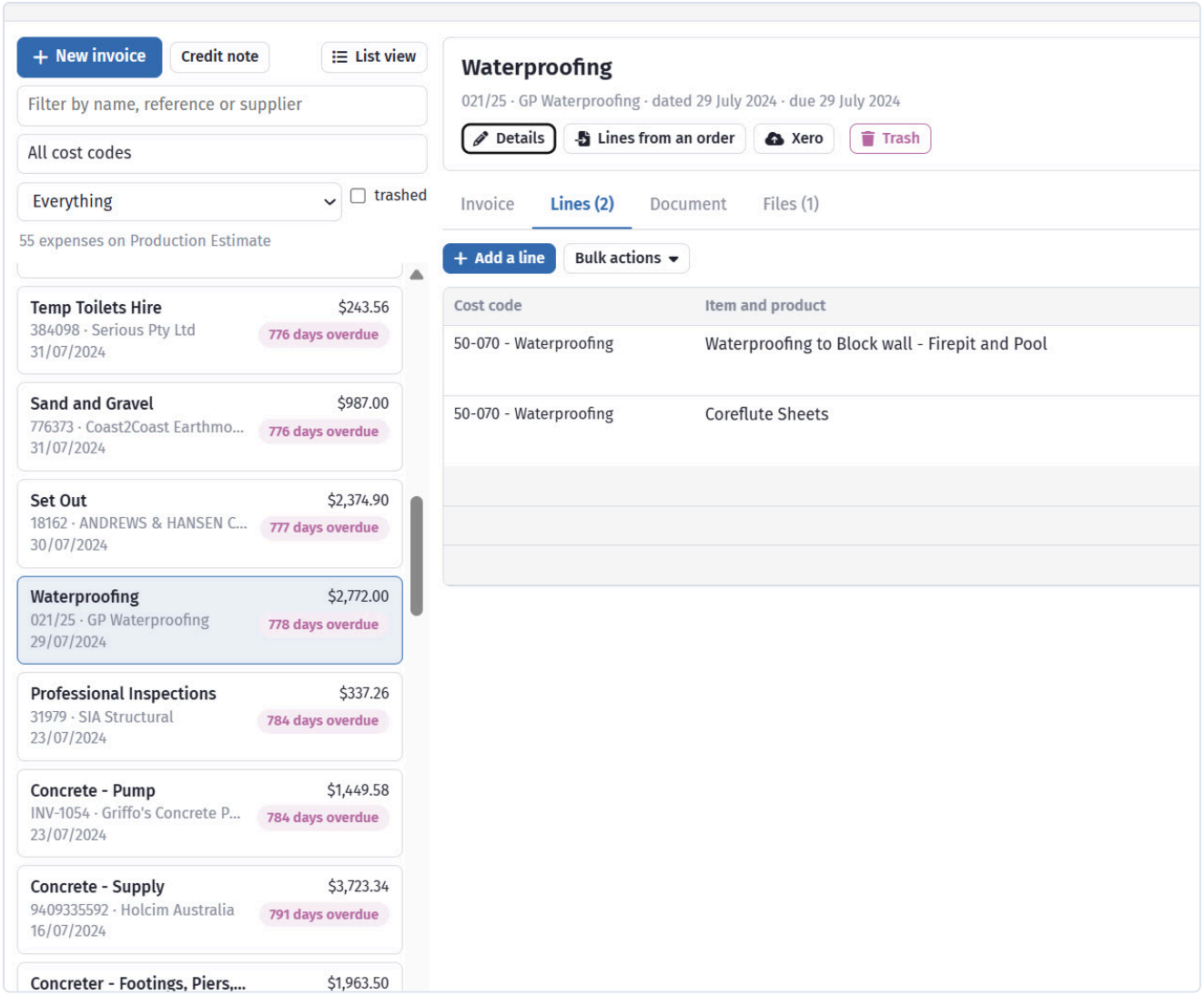
In this section

- Recording an invoice
- Matching to an order
- Cost to date against budget
- The expenses list

27.2 Recording an invoice BUILDER PLAN

Every field on an expense, attaching the supplier's document, and the fastest way to enter one.

Three ways in: **New expense** on the expenses list (it starts from the supplier's document), **New invoice** on the Expenses screen, or **Generate Invoice** from a purchase order.



Record it against the order and the loop closes itself.

Starting from the document

New expense on the expenses list takes the supplier's invoice first — drop the PDF or a photo of it, then fill in the details.

The document is attached the moment you drop it, before you type anything. That is the whole point of starting this way: every other route attaches the file as a separate step afterwards, which is the step that gets skipped, and the attachment is the one thing you cannot reconstruct later.

Choose the job in the page header first — a document has to belong to one.

> **The supplier and a cost code are needed before it imports** — Both are asked for on the form, and **Save** stays disabled until they are set. An expense with no supplier belongs to nobody, and one with no cost code reaches no budget — the job is quietly short by that invoice and nothing on screen says so.
>
> Either pick **one cost code for the whole invoice**, or set one **per line** in the lines table. A line with neither is named, so you can see which still needs one.

> **Use this one when the invoice arrives by email** — Save the attachment, drop it in, type the reference and date. The expense exists with its paperwork on it in under a minute, and you can code it to cost codes whenever you get to it.

You can capture a supplier **credit note** the same way — change Type in the form.

What it reads

The supplier's reference, the date, the due date and the totals come off the document. So does the **supplier** — matched by ABN where you have one recorded, and otherwise by name, so "Porter Consulting Pty Ltd" on the letterhead finds "Porter Consulting" in your list.

The **description** is read from the lines, not the file name: a "Re:" or "Job:" line if the supplier prints one, otherwise the first charge under its section heading and a count of the rest — *"Building Certification: Issue Building Approval for dwelling & pool (+7 more)"*. Reword it if you like; it is a starting point.

> **Recording a supplier's ABN pays for itself** — A name can be written several ways; an ABN cannot. Add it once to a supplier and every future invoice from them is matched exactly, without anyone checking.

The lines

If the invoice quotes one of your purchase order numbers, SmarteBuild finds it, links the order, and creates the lines already coded to the same cost codes — using the **invoice's** amounts, not the order's. That matters on a progress claim, where the invoice is deliberately a fraction of the order.

If it does not quote one, the lines still come off the document with the right amounts, and you set the cost code on each one in the form before it imports — or pick a single cost code for the whole invoice.

Either way the lines are shown before you save so you can check the shape.

> **Ask suppliers to print your order number** — It is the difference between an expense that codes itself and one you code by hand. Your purchase orders already ask for it — this is what it was asking for.

> **It gets better as you use it** — Every line you code, or re-code, is remembered against that supplier's wording — and a correction sticks, so a wrong suggestion is not offered again. The first invoice from a new supplier takes some tidying up; the tenth mostly codes itself.

Where the individual lines cannot be read confidently, it falls back to a single line for the invoice total rather than guessing at the breakdown. One line with the right money is easier to split than several with the wrong money.

The Expenses screen

It works like the Orders screen. On the left, every expense on the estimate you are in, newest first, with its total including GST and marks for what needs attention: **overdue**, **no document**, **reference used twice**, **credit note**, and where it stands in Xero (**In Xero**, **Paid**). Filter by name, reference or supplier, by

cost code, or to just the credit notes or just the ones not in Xero yet. The total at the bottom subtracts credit notes and leaves out anything in the trash.

Click an expense to open it on the right, across four tabs:

Tab	What it shows
Invoice	The details, the totals, where it stands in Xero, and who recorded it
Lines	What was bought, and which job and cost code each part is charged to
Document	The supplier's invoice itself, beside the figures you typed from it
Files	Everything attached — upload, attach from the project, choose the default

The buttons above the tabs change the details, take the lines from an order, send it to Xero, and move it to the trash.

The fields

Field	What it is
Reference	The supplier's invoice number, exactly as printed
Name	A few words saying what it is for
Invoice date	The date on the supplier's invoice
Due date	When payment falls due — a week after the invoice date unless you change it
Supplier	Who sent it; choose the supplier list first, then search it
Related purchase order	The order it bills, if there is one
Note	Anything worth knowing later (on **Details**, once it exists)

Each line has its own:

Field	What it is
Job	The estimate this part of the invoice is charged to
Cost code	Where on that job it lands — a real cost code, not a heading
Item / Product	The estimate item it pays for, or a one-off description
Quantity / Price	As charged by the supplier, price excluding GST
Includes GST	Tick it to type the price including GST; it is saved without it

Quantity and price take a sum as well as a figure — type `=12*2.4` and the result is saved.

Use the supplier's numbers exactly

Reference and **Invoice date** should be exactly what is on the supplier's document, not your own reference or the date you entered it.

When you query an invoice, or when your bookkeeper reconciles a supplier statement, the supplier's number is the only thing both sides share. A creative internal reference means every query starts with working out which invoice you mean.

The reference is checked against your other expenses as you type. Two suppliers can both number an invoice 1001, so a match is allowed — but you are asked before it is saved, because the usual reason is the same invoice being entered twice.

Attach the document

On the **Files** tab, **Upload** attaches the supplier's invoice PDF or a photo of it. **Attach from the project** links a document that is already in the project instead.

Do it every time. The attached document is what settles the question when a supplier statement shows an invoice you have no record of, or when the same invoice arrives twice a month apart — which happens more often than you would expect.

The **default** document is the one the **Document** tab opens and the one sent to Xero with the bill. The first one you attach becomes the default; **Make default** changes it.

> **Attaching the PDF is the highest-value thirty seconds in this module** — An expense with the source document attached can be verified by anyone, later, without asking the supplier for a copy. One without it relies on somebody's memory of what was on it.

The fastest way in

Generate Invoice from the purchase order. The supplier, the items, the quantities and the values all come from the order, so entering the expense is a matter of adding the invoice number and date and correcting anything the supplier charged differently.

It also guarantees the expense is matched to the order, which is where the useful number comes from. See Matching to an order.

Already recorded the invoice? **Lines from an order** on the Expenses screen does the same for an existing one. It **replaces** every line with the order's, and asks first if there are lines to lose.

Invoices with no order

Some legitimately have none — a small account purchase, a fee, something bought on the spot.

Record these against the estimate and code them to the right **cost code**, so the cost lands in the right trade even though there is nothing to match against. Tick **a one-off line** when there is no estimate item to pick.

If you find yourself doing this often for the same kind of purchase, that is usually a sign the order should have been raised. Recurring unordered spend is exactly what the committed figure exists to catch.

Invoices spanning several jobs

A supplier delivering to three sites on one invoice is recorded **once**. Give each portion its own line, and choose that portion's **Job** on the line. Each job's budget then carries only its share, and the invoice itself — reference, total, document — stays in one place, matching what the supplier sent.

When an invoice's lines are on more than one job, the **Lines** tab adds a **Job** column, so it is clear which part went where. Opening the job picker on a line shows the job it is already on; start typing to search for another.

Credit notes

Credit note on the list records a supplier credit. Type its lines as positive amounts — they are saved as credits and **reduce** the job's cost, and its totals show negative. Link it to the invoice it credits, if there is one, so the list can show which one it reduces.

A credit note cannot take its lines from an order or from the estimate: those are things delivered, and a credit is things taken back.

Due dates

Due date drives what is coming up for payment. Filling it in is what makes the expenses list useful as a payables view rather than just a record of what has arrived — an expense past its due date and not marked paid is marked **overdue**.

Marking it paid

Mark as paid records that you have paid this one. It asks when — it offers today, and you can type another date, because entering last month's payments is normal. The expense then shows **Paid** with that date instead of an overdue count, on the expense and in the list, and **undo** beside it puts it back.

It is only SmarteBuild's record: nothing is sent to your bank or to Xero. Builders who use Xero get paid status from the Xero sync instead and rarely need this. Builders who do not use Xero need it, or every invoice they enter counts up as overdue for ever.

To catch up on a pile of them, use the expenses list: tick the rows and **Mark as paid** does the lot with one date.

Xero

Xero sends the expense to Xero as a draft bill (a credit note goes as a supplier credit), with its default document attached, and opens it in Xero once it has gone. The dialog lists the job, the cost codes and the supplier, and whether each is mapped to Xero — anything not mapped has a **Map** button that opens the Xero settings, and the export waits until everything is.

If the bill goes but its document does not attach, you are told so. **Do not export again** — the bill is already in Xero; attach the document there.

Once exported, the expense says so at the top. Changes made in SmarteBuild after that are **not** sent to Xero — change the bill there too. **Disconnect from Xero** forgets the link so it can be exported again; it does not delete anything in Xero, so void the old bill there first or you will have two.

To send several at once, use the expenses list instead — tick them and export the batch.

The point of exporting rather than re-keying is that the invoice reference and amount agree in both systems by construction. Where they are entered twice, they disagree eventually — and because they came from one entry, SmarteBuild can compare its total against Xero's afterwards and tell you when they have drifted apart.

Trash, and deleting for good

Trash takes an expense off the job's cost without losing it — tick **trashed** in the list to see it again, and **Restore** puts it back. A trashed expense cannot be changed. Use this one if there is any chance you want it back.

Delete permanently removes the expense and its lines outright, whether or not it has been trashed first. Its cost comes off the job and there is no undo, so it asks you to confirm and shows the reference and the amount before it does anything. The documents stay in the project — deleting the expense does not delete the supplier's invoice you attached to it.

One expense cannot be deleted: one that has been **exported to Xero**. The bill in Xero stays exactly where it is, so deleting this side would leave it with nothing behind it. **Disconnect from Xero** first — then the delete is offered. (Disconnecting does not touch the bill in Xero either; void or delete it there if it should not stand.)

27.3 Matching to an order BUILDER PLAN

Checking a supplier invoice against what you ordered, what the common mismatches mean, and what to do about each.

Matching an invoice to its order is where the money is actually saved. It takes a minute per invoice and it is the only point at which an overcharge is still a question rather than a credit request.

What to compare

Check	Question
Supplier	Is this the supplier you ordered from?
Quantity	Did they deliver what the order says?
Rate	Is the unit price the one you agreed?
Total	Does it multiply out?
GST	Charged correctly?
Extras	Delivery, waiting time, call-out — were these in the order?

The common mismatches

The rate is higher than the order. Either the price rose between order and delivery, or the order was raised at an out-of-date rate. Query it. Suppliers generally honour the ordered rate; the ones who do not will at least tell you the new price applies from now, which you need to know.

The quantity is higher. An extra part-load of concrete, more mesh than ordered. Usually legitimate — site conditions — but it should have been authorised at the time. If nobody on site knows about it, ask.

There are charges not on the order. Waiting time, after-hours delivery, a call-out fee, pump-out. These are the most commonly disputed items and the most commonly waved through. If it was not in the order, it needs a reason.

The invoice is for work not done. Rare, and worth catching. Check against the site before paying.

> **Small overcharges are the expensive ones** — A $362 concrete overcharge on one job is noise. The same overcharge on forty jobs a year is $14,000 you did not price for. The invoices worth checking are not the large ones — those get scrutinised anyway — but the routine ones nobody looks at.

Worked example

The Hendricks concrete order and the invoice that came back:

	Ordered	Invoiced	Difference
Concrete N32	18.64 m³ @ $228 = $4,249.92	19.20 m³ @ $228 = $4,377.60	+$127.68
Concrete pump	1 @ $850 = $850.00	1 @ $850 = $850.00	—
Waiting time	not ordered	1.5 hr @ $156 = $234.00	+$234.00
Total ex GST	**$5,099.92**	**$5,461.60**	**+$361.68**

Two separate things, and they need separate answers.

The extra 0.56 m³ is normal — you order to the calculated volume and the site takes what it takes. Accept it, and note that your slab allowance runs about 3% light on this kind of job.

The waiting time is a question. Ring the supervisor: was the truck held up, and why? If the pump was late, that is arguably the pump supplier's cost, not yours. If the site was not ready, it is a genuine cost and a lesson. Either way it should not be paid without anybody knowing what it was for.

Part deliveries

An order delivered in stages produces several invoices against one order. Record each as its own expense matched to the same order.

The order's committed value stays as ordered; the actual accumulates across the invoices. When the last one is in, the two should agree.

When the order was wrong

Sometimes the invoice is right and the order was wrong — you ordered at a stale rate, or the scope grew and nobody revised the order.

Fix the order rather than quietly accepting the difference in the expense. An order that no longer reflects the agreed scope makes the committed figure wrong for every report from then on. See Committed vs actual cost.

A workable routine

Once a week, with the invoices that have arrived:

1. Generate each expense from its order where possible.
2. Correct the quantities and rates to what was actually charged.
3. Look at every difference and decide: accept, query, or fix the order.
4. Attach the supplier PDF.
5. Export to Xero for payment.

Ten minutes for a normal week, and it is the difference between knowing what your jobs cost and finding out afterwards.

27.4 Cost to date against budget BUILDER PLAN

Reading actual cost against what you allowed, spotting an overrun while you can still act on it, and the traps in the numbers.

Cost to date is what the job has actually cost so far. Against the budget, it tells you whether the estimate is holding up — but only if you read it carefully, because the obvious comparison is misleading.

$2,772.00 inc GST

2 lines

QTY	Price ex GST	Total ex GST	Inc GST	Budget	Actual	
1 est. 33.28	1980	$1,980.00	$2,178.00	$1,996.80	$1,980.00	Edit ×
1 est. 18	540	$540.00	$594.00	$198.00	$540.00	Edit ×
	Sub total	**$2,520.00**				
	GST	**$252.00**				
	Total	**$2,772.00**				

What the job has actually cost so far, against what you allowed.

The trap

Cost to date against total budget tells you almost nothing on its own.

A job that has spent 45% of the budget is doing well if it is 60% built and badly if it is 30% built. The spend figure alone cannot distinguish those, and the difference is the entire question.

You need three things together:

	From
Allowed	The BOQ
Committed	Purchase orders
Actual	Expenses

Plus a view of how much is actually built.

Read it by trade, not by job

The job-level total hides everything. A trade $4,000 over and another $4,000 under look like a job on budget, and they are two separate problems.

Turn on **Show Actual Costs Columns** in the BOQ and read it by cost code.

Worked example

The Hendricks job at frame stage:

Trade	Allowed	Committed	Actual	Built?
Preliminaries	$12,400	$9,200	$8,640	Ongoing
Site works	$8,900	$9,340	$9,340	Complete
Concrete	$9,784	$7,576	$7,938	Complete
Framing	$34,200	$34,200	$18,900	Complete
Roofing	$18,600	$19,850	$0	Not started
Total	**$83,884**	**$80,166**	**$44,818**	

Four separate readings:

Site works is $440 over and complete. Closed out, over budget. Note it for next time.

Concrete is $362 over the order. See Matching to an order — the waiting time.

Framing is complete but only half invoiced. The carpenter's final invoice is coming. This is the most dangerous line on the table, because the actual column makes the trade look under budget when it is exactly on it.

Roofing is committed $1,250 over before a tile has been laid. The best line on the table — the overrun is visible before the work starts, so there is still time to do something about it.

Committed is the early-warning number

Actual tells you what has happened. Committed tells you what is about to.

The roofing line above is the whole argument for raising orders: a $1,250 overrun that is visible while you can still renegotiate, re-scope or accept it deliberately, rather than discovering it in an invoice.

> **Work complete but not invoiced is the most common misreading** — A trade that is finished and half invoiced looks under budget. It is not — the rest of the invoice is coming. Always read the actual column alongside whether the work is actually done.

Where to look

Where	Gives you
BOQ with actual cost columns	Item and trade detail
Estimate metrics on the Projects list	Job-level cost against budget
Expenses list	Everything charged, by supplier and date

A monthly routine

1. Open the BOQ with actual cost columns on.
2. Read down by trade, not by total.
3. For each trade, ask: is it built, and does the spend match?
4. Flag anything where **committed exceeds allowed** — act now.
5. Flag anything where **actual exceeds committed** — query the invoice.
6. Check whether trades that are complete are fully invoiced.

Fifteen minutes. Step six is the one that stops a job looking profitable right up until the last invoices land.

Feeding it back

The most valuable output is not this job — it is the next one. A trade that runs over on three jobs running is a rate that needs changing in your price list, not bad luck.

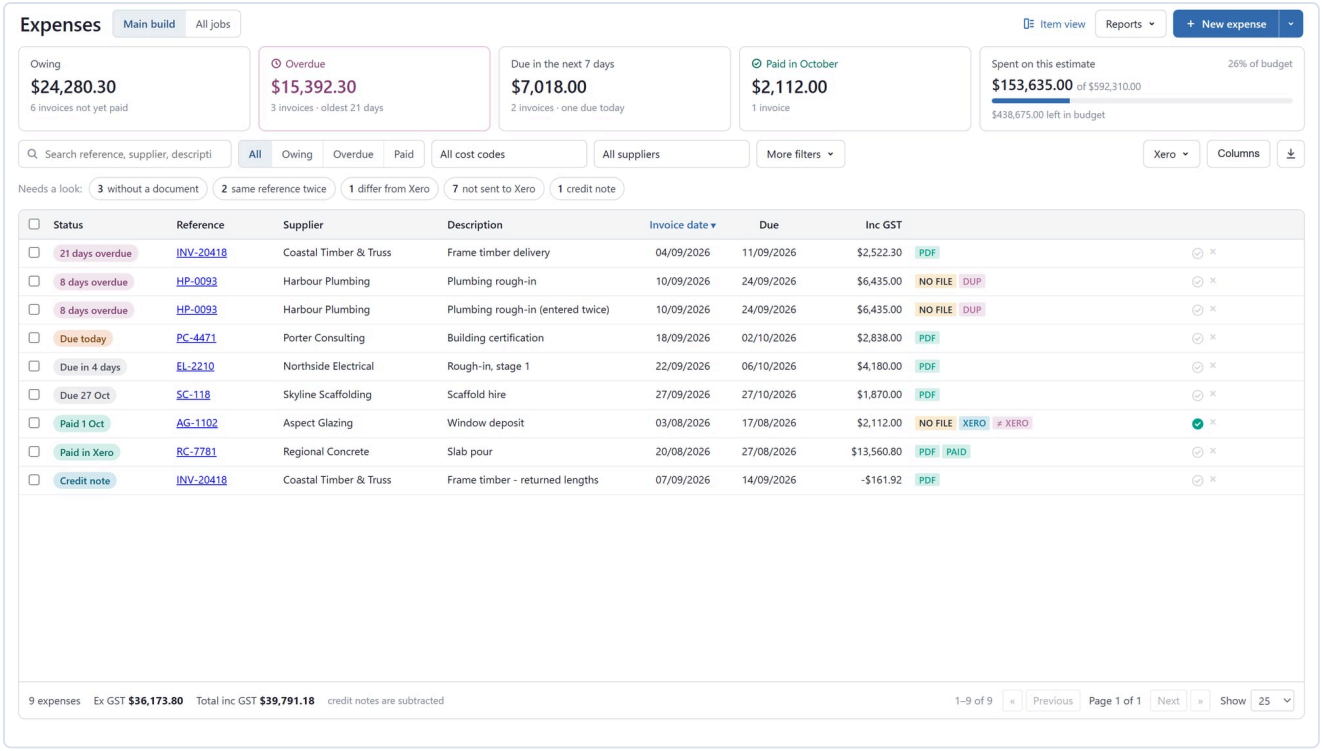
That is the argument for keeping finished jobs archived rather than deleted: your own cost history is the best pricing data available to you.

27.5 The expenses list BUILDER PLAN

Every expense across your jobs in one list — what you owe and what is late, the warnings it raises, the detail drawer, marking invoices paid, and sending them to Xero in a batch.

The **expenses list** is every supplier invoice and credit note on your job — or across all your jobs — in one place. Open it from **List view** on the Expenses screen.

It is built around the question most people open it to answer: **what do we owe, and what is late?**



Owing, overdue, due this week and paid this month — each figure is also a filter.

What you owe, along the top

Four figures lead the page, all including GST:

Figure	What it counts
Owing	Everything not yet paid
Overdue	Not paid, and past its due date — with how late the oldest one is
Due in the next 7 days	Not paid, due today or within a week
Paid in *(this month)*	Paid this month — marked paid here, or paid in Xero

Each figure is also a filter. Click **Overdue** and the list shows only those invoices; click it again to show everything. The figures themselves never change when you filter, so the other three stay readable while you work through one.

Beside them, **Spent on this estimate** shows what the job has cost so far against its budget, and what is left.

> **Paid means either kind** — An invoice counts as paid when you have marked it paid here, **or** when Xero says it has been paid. A paid invoice is never counted as overdue, whatever its due date says.

This estimate, or all jobs

The switch beside the title chooses between **this estimate** (the one picked in the bar at the top of the page) and **All jobs** — every expense in the company that you have access to. In **All jobs** a **Project / Estimate** column appears, and the reports and the cost code filter step aside, because both belong to one estimate.

Finding things

- **Search** — type part of a reference, a supplier or a description. The list narrows as you type.
- **All / Owing / Overdue / Paid** — the same filters as the figures, in one switch.
- **All cost codes** and **All suppliers** — type to find one; a job has hundreds of cost codes.
- **More filters** — **Include the trash** shows expenses moved to the trash, marked as such.

Needs a look

Under the filters, a row of warnings — each one a count, and each one a filter:

Warning	What it means	Why it matters
without a document	No supplier invoice attached	The one thing you cannot recreate later
same reference twice	Another expense uses the same reference	Usually the same invoice entered twice
differ from Xero	Xero's total disagrees with the expense	A bill short a line, a duplicate, or edited in Xero
not sent to Xero	Never exported	Nothing has been sent for payment
credit note	Supplier credit notes	Already subtracted from the totals

Click one to see just those expenses; click it again to see everything. A warning with nothing in it is not shown — its absence is the good news.

> **The duplicate warning is the one that pays for itself** — Suppliers re-send statements, and the same invoice gets entered twice more often than anyone expects. A duplicate caught here is thirty seconds. A duplicate paid is a credit to chase.

The list

Every row starts with its **status in words** — *21 days overdue*, *Due today*, *Due in 4 days*, *Paid 15 Sep*, *Paid in Xero*, *Credit note*. Overdue ones are pink, ones due today are orange, paid ones are green.

At the end of each row are small markers:

Marker	Means
PDF	A document is attached — click to read it without leaving the page
no file	Nothing attached
dup	Another expense uses this reference
Xero / **paid**	Exported to Xero — click to open the bill there
≠ Xero	Xero's total disagrees with this expense

Then the **tick** (mark as paid) and the × (delete) — both described below.

Click a column heading to sort by it; click again to reverse. Sorting covers everything the filters show, not just the page on screen.

The line under the list totals **everything the filters cover**, ex GST and inc GST — the number to check against a supplier statement. Credit notes are subtracted, and it says so.

Looking at an expense

Click a row and it opens in a **drawer** on the right, beside the list. The list stays usable while it is open: click another row and the drawer shows that one instead, or step through with the **up and down arrows** at the top. × or **Esc** closes it.

The drawer shows the status and amount, any warning (with **Show them** for a repeated reference), the dates, purchase order, Xero status and who entered it, every line with its cost code, and a preview of the supplier's document. Straight from it you can:

- **Mark as paid** — or undo it
- **Send to Xero**
- **Attach the supplier's invoice**, when none is attached — drop the PDF or photo on it

To change the details or code a line, use **Open full expense**.

Marking expenses paid

If you do not use Xero, this is what stops every invoice you have ever entered counting up as overdue.

- **One at a time:** the **tick** at the end of the row, or **Mark as paid** in the drawer. It asks when it was paid — today is offered, and you can type another date, because entering last month's payments is normal. The tick turns solid green once paid; clicking a solid tick undoes it, after asking.
- **Several at once:** tick the boxes on the left and press **Mark as paid** in the dark bar that appears. One date for the whole batch; anything already marked paid is left exactly as it is.

It is SmarteBuild's own record — nothing is sent to your bank or to Xero. If you use Xero, the payment sync marks bills paid for you and you rarely need this.

Ticking rows

Ticking one or more rows swaps the warnings for a dark bar with what you can do to them: **Mark as paid**, **Send to Xero**, **Download** (a CSV of just those rows) and **Delete**. The × at its end clears the ticks.

> **Ticks do not survive turning the page** — Ticks are cleared when you change page, sort or filter. That is deliberate: something that acts on many expenses at once should only act on the ones you can see.

Deleting permanently

The × at the end of a row deletes that expense for good: its lines go with it and its cost comes off the job. It asks first, showing the reference, the supplier and the amount — there is no undo, and one row looks much like the next. For several, tick them and use **Delete** in the dark bar.

An expense already sent to **Xero** cannot be deleted here — the bill in Xero would be left with nothing behind it. Disconnect it from Xero first (open it, then **Disconnect from Xero**). Deleting an expense never deletes the supplier's document; that stays in the project's documents.

Adding an expense

New expense starts from the supplier's document: drop the PDF or a photo and the details are read off it. The arrow beside it offers **Type it in** (a blank expense) and **A credit note**.

Reports

Reports prints the estimate's expense reports — all invoices, by cost code, and the profit and loss (summary or detailed). They report on one estimate, so they are not offered in **All jobs**.

Choosing columns

Columns adds and removes columns. Your choice is saved against your sign-in, so the list looks the same on your office computer, your laptop and anywhere else you sign in. Worth knowing about:

- **Ex GST** and **GST** — the list shows the total inc GST; add these to see the split
- **Paid** — the date it was marked paid, for sorting by payment date
- **Whole invoice** — the full value where an invoice is split across several jobs and the main figure shows only this job's share
- **Xero** and **Owing** — the bill's status in Xero and what is still outstanding there
- **PO** — a PDF mark where the expense is linked to a purchase order; click it to see the order without leaving the page
- **PO value** — that order's total, ex GST: **red** when the invoice is more than the order, **green** when it is less. Hover for the difference in dollars

The order's value, and the prices on its PDF, need the **Show Order Value** permission. Without it the column is blank and the PDF shows no prices.

The **download** button beside **Columns** saves the rows on screen as a CSV, with the columns you have chosen.

Changing a column's width

Every column can be made wider or narrower. Point at the line between two headings — the pointer turns into a double arrow — then drag it left or right. Widths are saved against your sign-in too, so the list opens the way you left it, on any computer.

A few shortcuts:

- **Double-click** that line to put one column back to its normal width.
- **Reset column widths**, at the bottom of the **Columns** list, puts them all back.
- Without a mouse: tab to the line and use the left and right arrow keys (hold Shift to move in smaller steps).

Text too long for its column is cut off with a `…`, and hovering over the cell shows the whole thing. If the columns together are wider than the window, the list scrolls sideways rather than squashing everything.

Sending expenses to Xero

Tick the expenses and choose **Send to Xero** (in the dark bar, or under the **Xero** button). Before anything is sent you see what **would** happen, with a reason beside anything that cannot go — an unmapped supplier, a line with no cost code. Bills arrive in Xero as **drafts**, for you to authorise there.

Keeping up with Xero

Once an expense has been exported, SmarteBuild reads its status back from Xero, so the list knows what has been authorised, paid or voided without checking in two places. **Xero › Check payments in Xero now** pulls the latest; it also happens on its own when the figures are out of date, and straight after a batch send.

When a bill does not match

≠ Xero means Xero's total is not the same as the expense here. The usual causes:

1. The bill in Xero is **missing a line**.
2. The bill was **entered twice** — once by the export, once by hand.
3. Somebody **edited the bill in Xero** after it was sent.

Open the bill and compare. If the difference is real and you have decided to leave it, click **≠ Xero** and accept it — it stops being counted, so the warnings can get back to empty.

Credit notes

A supplier credit — a return, a rebate, an overcharge put right — is recorded as a **credit note**, not as an invoice with a minus sign. Add one from **New expense › A credit note**, and enter the quantities as ordinary positive numbers: SmarteBuild knows it is a credit and takes the money off.

A credit note reduces the job's cost to date, shows in the list as **Credit note**, is netted into the totals (the footer says so) and goes to Xero as a credit note, not a bill. It usually carries the reference of the invoice it credits — which is correct, and not reported as a duplicate.

A monthly routine

1. Click **Overdue** and deal with what is late.
2. Clear **without a document** — chase the missing invoices while people still remember them.
3. Check **same reference twice** before a payment run.
4. Click **Due in the next 7 days** to see what is coming.
5. Send anything **not sent to Xero**, and settle anything that **differs from Xero**.

Steps two and three are the ones nobody does unprompted, and they are the two that cost real money when skipped.

CHAPTER 28

Colour selection

28.1 What the selections schedule is for BUILDER PLAN

Recording what the client chooses, room by room, so the estimate, the orders and the build all agree.

Colour Selection is the client's selections schedule — every choice they make, room by room, recorded against the items you priced.

Why it needs to be a document

Selections are the largest source of disputes on a residential job, and almost all of them come down to the same thing: nobody wrote it down.

The client remembers choosing the matt tile. The order went out for gloss. Six weeks later the bathroom is tiled and somebody is paying to redo it.

A selections schedule is the record that prevents that. It is also the document that gets signed off, which is what makes it useful when memories differ.

What it connects to

Connects to	How
BOQ items	Selections are made against the items you priced
Products	The specific product chosen, with SKU and image
Purchase Orders	The chosen product's part number goes on the order
Variations	A selection above its allowance becomes a variation

That last row is the commercially important one. Most PC and PS items in a bill are there because the client has not chosen yet. When they do, the difference between their choice and the allowance is a variation — and the selections schedule is where you find out.

The process

1. **Estimate.** The estimator prices the job and sends the items that need choosing to the selections schedule — a category at a time, straight from the estimate.
2. **Select.** The interior consultant and the client choose, in the office or through a private link sent to the client and their designer.
3. **Approve.** The builder approves each selection, and raises a variation for anything over its allowance.
4. **Update the estimate.** The approved selections are pushed into the BOQ items, with the change to the estimate shown and confirmed first.

5. **Update the orders.** The same push updates every purchase order not yet sent, so what was chosen is what gets bought.

How it is organised

Rooms, containing **categories**, containing **items**.

```
Kitchen
  Tapware
    Sink mixer
  Benchtops
    Stone benchtop
  Appliances
    Oven
    Cooktop
Main bathroom
  Tapware
    Basin mixer
    Shower mixer
  Tiling
    Floor tile
    Wall tile
```

That structure matters because it is how a client thinks. They choose *for the kitchen*, not for cost code 1100.

What an item carries

Field	What it is
Item Code / **Item Name**	What is being chosen
Description	The detail
Price and **Quantity**	What it costs (the price shows only to users with the *See prices and allowances* permission)
Product URL	Link to the product
Colour Selection Note	Visible to the client
Internal Note	Never shown to the client

The two note fields are worth keeping straight. *"Client leaning towards matt, chase by Friday"* belongs in the internal note.

In this section

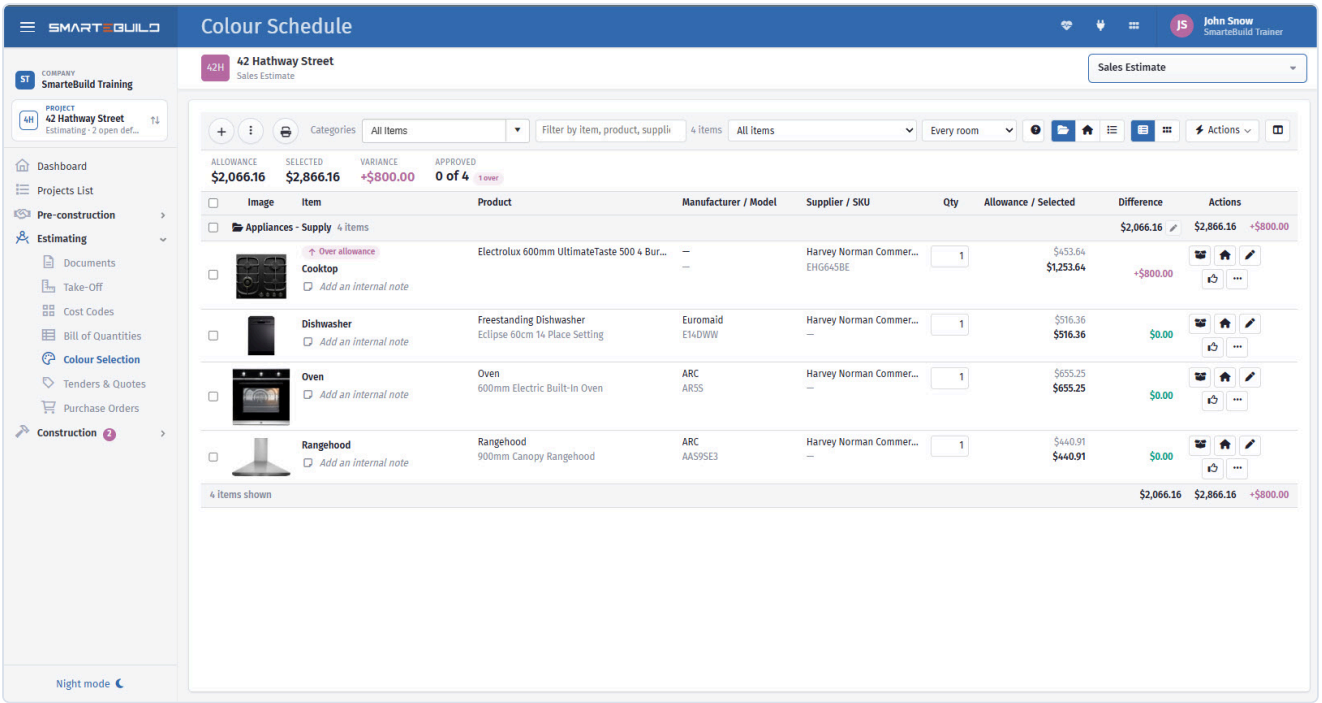
- Building the schedule
- Running a selection with the client
- Columns and printing

- Sharing the schedule with the client
- Updating the estimate and the orders

28.2 Building the schedule BUILDER PLAN

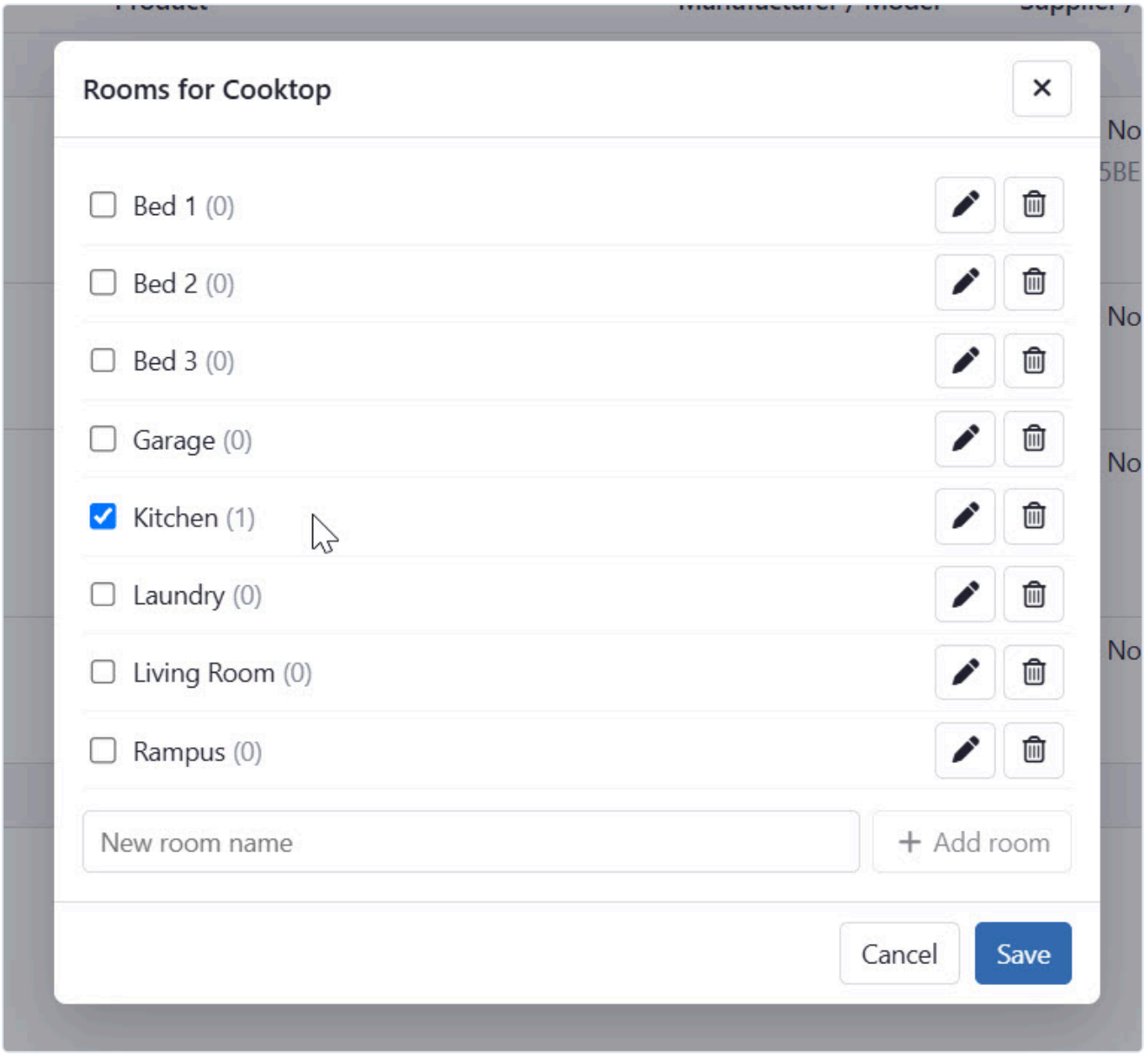
Setting up rooms and categories, importing the items to be chosen, and getting the allowances visible.

Build the schedule before the client's first selections appointment, not during it.



Every selection the client has to make, room by room.

Rooms



Rooms are how the client thinks about the house, so build it that way.

Rooms, under the **Actions** menu in the grid's toolbar (it opens when you hover), adds, renames and deletes rooms. Name them as the client does — `Kitchen`, `Main bathroom`, `Ensuite`, `Laundry`, `Bed 1`.

Use the room names from the drawings so there is no ambiguity about which bathroom is which.

An item can belong to more than one room — a floor tile usually does. The **Rooms** column shows where each item goes; click it, or the house button on the row, and tick the rooms. To put a set of items into a room in one go, tick them and use **Add to rooms** in the bar that appears. Switch the grid to **By room** and it lays the whole schedule out room by room, which is how a site walk happens; the room dropdown narrows it to one room at a time.

Adding a product

Press **Select Product** — the first button on a row or a gallery card — and the product picker opens. Adding a product is done there, alongside choosing one, because both are the same job: it is where the item's

products live. There are two ways in.

From your price list

Search everything on your price lists at once — by product, brand, supplier or code — and put it on the item. The copy keeps a link back to the original, so its picture and its price can still be followed later. This is the one to reach for first: it is a product you have already priced and already trust.

From a supplier link

This takes the web address of a product on a supplier's website and reads the page for you.

Paste the address, press **Read the page**, and the product name, brand, code, price, colour and picture come back filled in. Check them, change anything that is wrong, and save. The product is added to the item — so it also appears as an option on the client's page — and, unless you untick it, becomes the selected product.

> **Check the price** — A supplier's website shows retail. Your trade price is usually lower, and the figure that comes back is the one that will land in the estimate when you update it. Correct it before saving.

Two things worth knowing:

- **Use the product's own page**, not a search result or a category listing. A listing page has no single product on it, so nothing useful comes back.
- **Some sites give nothing.** If the page is built entirely in the browser, or the supplier blocks outside requests, you will be told so and can type the details in by hand — the picture address still works on its own.

The item must not be approved or ordered; un-approve it first, the same as changing a product.

Checking prices at the supplier

Prices move. **Check supplier prices** in the **Actions** menu reads the page behind every product on the schedule that has a supplier link, and shows you only the ones that have changed: what it was, what it is now, and what accepting it does to this job.

Tick the ones you accept and press **Update**. Nothing is written until then, and the total at the bottom — *"accepting these changes moves this job by +$1,840"* — is the number worth reading before you press it.

Two things to know:

- It updates the price **on this job only**, never your price list.
- Items already on a sent purchase order are left alone. That price is on a document a supplier is holding, and changing it here would only hide the problem.

Products that cannot be read — a page that has moved, a site that blocks us — are listed at the bottom so you know they were not silently skipped.

Categories

Add Category creates a category within a room. **Category Name** names it.

Group by the kind of decision, because that is how selections actually happen:

`Tapware`
`Tiling`
`Benchtops`
`Cabinetry`
`Appliances`
`Flooring`
`Paint`
`Door hardware`
`Lighting and electrical`

A client picks all the tapware in one conversation, not one tap per room.

Importing the items

Add Category and import items creates a category and brings in the BOQ items in one step. **Add All** and **Add All Included** bring in items in bulk.

Price List Heading and **Look Up** help find what you are importing.

Importing rather than typing is what keeps the schedule tied to what you priced. An item typed in by hand has no allowance behind it, so nobody can tell whether the client's choice costs more than the contract carried.

Copying a schedule from another job

There are two ways to reuse a schedule, and which one you want depends on when you think of it:

- **Duplicating an estimate, or starting a job from a template,** brings the schedule with it automatically. Nothing to do — see Duplicating an estimate.
- **Copy from another job** is for a job that already exists, where you did not start it from the right template, or the schedule you want is on a job that was never a template.

For the second, open the toolbar menu, pick the job to copy from, and you get a preview of exactly what would happen before anything is written.

It never adds items to your estimate. That is the whole point. A selection row has to hang off a BOQ item, and items belong to one estimate, so every row being copied has to be matched to an item this job already has. SmarteBuild matches on the price list item behind the row first, then on the item name.

Four things can happen to a row, and the preview tells you which:

The preview says	What it means
A product name and a reason	Matched. It will be copied.
A dropdown to choose from	Several items here could be the one. Pick which, or leave it out.
No item in this job looks like it	Nothing here to attach it to, so it is skipped. Add the item to the estimate first if you want it.
Already on this schedule	Left alone.

Ambiguity is normal and is not an error — if the other job had "Floor tile" and this job has three of them, only you know whether it was the bathroom, the laundry or the ensuite. The cost code shown next to each option is usually enough to tell them apart.

Only the shell comes across: the categories, the rooms, the notes, and which items are on the schedule. The other job's client choices, approvals, comments and deliveries stay with that job, and the quantities and prices come from this job's own items. Items already on this schedule are left alone, so running it twice is safe.

> **Better still, build a template** — Set up one estimate per house type with its schedule complete — categories, rooms, notes, the lot — and tick **Make this estimate a template**. Every job started from it then arrives with the schedule already built, and you never touch this dialog. Ten minutes once, instead of forty minutes per job. Use **Copy from another job** for the jobs you have already started.

Show the allowance

This is the thing that makes the whole schedule work.

Every PC and PS item should show what the contract allowed. A client choosing tapware needs to know they have $1,200 to spend, or they will choose $1,900 of tapware and be surprised by the variation.

> **State the allowance in the client-facing note** — *"Prime cost allowance $1,200 supply only. Selections above this will be adjusted by variation."* One sentence, on every PC item, and most selection disputes never happen.

An allowance for a whole category

Contracts usually give one allowance for a group of things - "Tapware $3,000", not a figure per tap. Group the schedule by category and press the pencil beside the category's allowance to type it. The window shows what the estimate has for those items (**Use that** copies it in) and what the client's choices come to now.

Once typed, the category heading shows the allowance with a wallet, and its selected total and variance count **every** item in the category, even when a filter hides some. The Allowance tile at the top and the footer use it in place of those items' estimate figures. **Remove allowance** goes back to the estimate figures.

Why type it rather than use the estimate: the estimate figure moves. Once a choice is pushed to the estimate, the estimate is priced from it and the overage disappears. A typed allowance stays put.

The product picker shows it too - how much of the category's allowance is left, and whether each product would keep the client within it - and so does the client's selections page, when the share link shows prices. Setting an allowance needs permission to make selections and to see prices and allowances.

Group Items

Group Items collects items for bulk handling — useful when reorganising a schedule that has grown, or moving a set of items between rooms.

Worked example

The Hendricks extension schedule, before the first appointment:

Room	Category	Item	Allowance
Kitchen	Tapware	Sink mixer	$340
Kitchen	Benchtops	Stone benchtop, 20mm	$3,200
Kitchen	Appliances	Oven	$1,400
Kitchen	Appliances	Cooktop	$900
Main bathroom	Tapware	Basin mixer	$280
Main bathroom	Tapware	Shower mixer	$320
Main bathroom	Tiling	Floor tile	$55/m²
Main bathroom	Tiling	Wall tile	$48/m²
Laundry	Tapware	Laundry mixer	$260

Nine decisions, each with a number against it. The client can work through it themselves, and every conversation starts from a known budget.

Before the appointment

1. Every PC and PS item is on the schedule.
2. Every one shows its allowance.
3. Products have **images** and **URLs** where you have them — see Products.
4. Items are grouped the way a person would choose them.
5. Anything with a long lead time is flagged in the note.

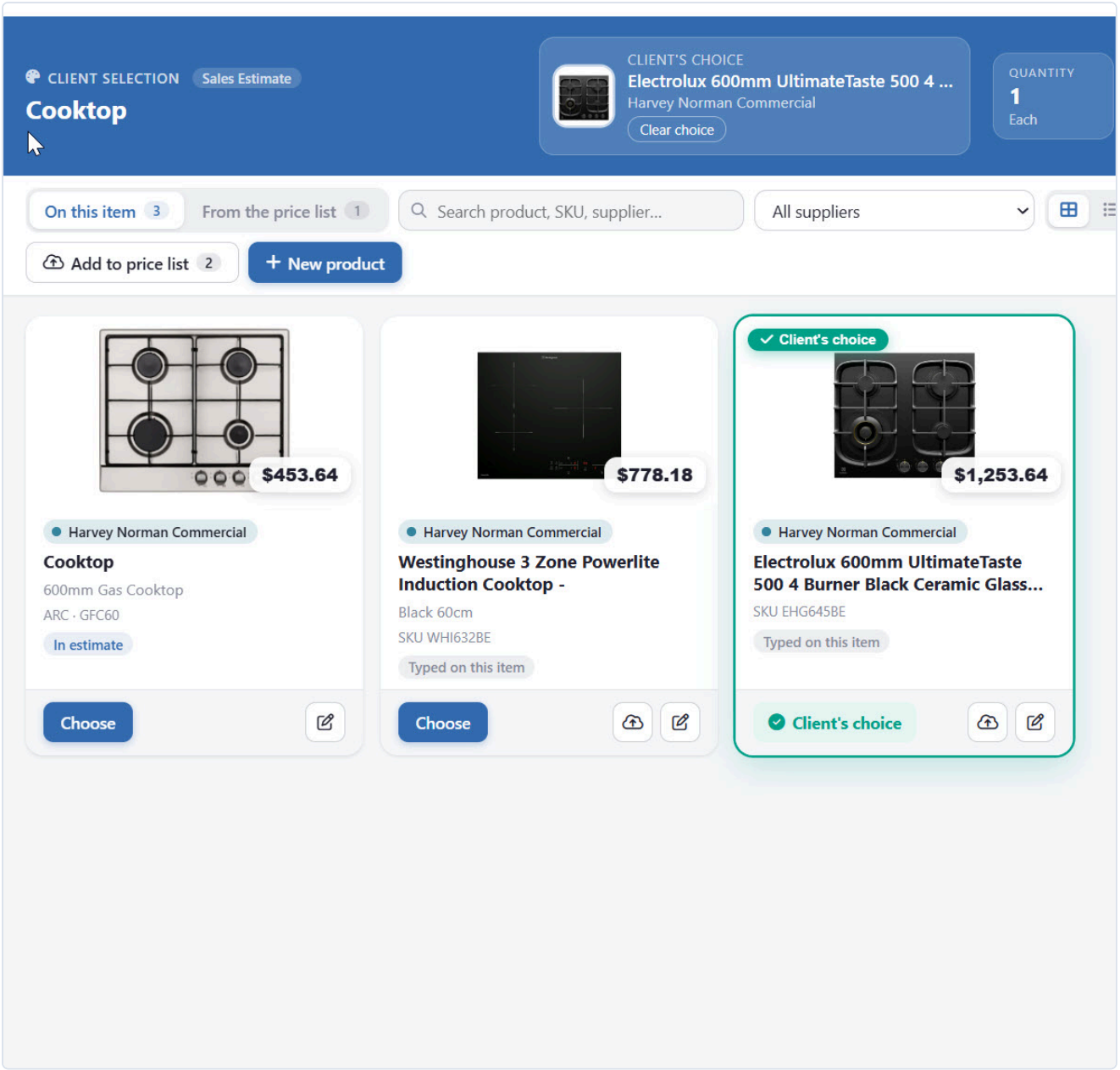
That fifth point saves jobs. A client taking three weeks to choose a cabinet with a six-week lead time has just moved your completion date, and the time to tell them is before they start deciding.

28.3 Running a selection with the client BUILDER PLAN

Recording choices as they are made, handling allowances that are exceeded, and getting the schedule signed off.

The appointment goes better when the schedule is already built and every allowance is visible. This is what to do during and after it.

> **The client can work through it themselves** — Selections also appear on the client's **portal**, so they can see what is outstanding and what they have chosen between appointments rather than waiting for you to send a schedule. See Client portal.



The product, the allowance and what it does to the price.

Record as you go

Enter each choice as it is made — product, colour, finish, size, price.

Not afterwards from notes. A schedule filled in from memory the next day is where the matt-versus-gloss problem comes from.

Each row has its own buttons on the right:

Button	What it does
Select Product (box)	Opens the product picker, where you choose the client's product and where you *add* one — from a supplier link or your price list — and set its picture. It does not change the estimate
Add to a room (house)	Which rooms this item is in
Edit item (pencil)	The item's own details
Approve (thumbs up)	Marks the selection as approved by the client
···	Comments, delivery, history and remove

They are in the order the job is actually done: pick the product, say where it goes, correct anything wrong, approve it. The same five are on a gallery card.

A **dot on the** ··· means there are comments on this item — amber when the client spoke last, so a question waiting for you is still visible with the menu closed.

You can also click an item's **picture** in the row, or the empty tile on a card, to change it without opening the picker.

Two things are edited straight in the row: the **quantity**, and the **internal note** underneath the item name (click it to type). Neither needs a form.

Status at a glance

Every row carries a chip for its state, so the schedule reads at a glance and still reads when printed in black and white:

- **Approved** — the client has confirmed this selection. The row is also marked teal.
- **Ordered** — the item is on a sent purchase order. Nothing about the selection can change any more.
- **Over allowance** — the chosen product costs more than the contract carried, by the amount shown in the Difference column.
- **In estimate** — the BOQ item and the unsent orders carry this selection. **Estimate not updated** is its opposite on an approved row: see Updating the estimate.

> **Un-approving resets the selection** — Taking an approval off an item also puts its product and quantity back to what the estimate had. You are asked to confirm before it happens.

Several items at once

Tick the box at the start of each row (or the one in the heading for everything shown, or the one on a category heading for that category) and a bar appears with the actions that apply to all of them: approve, un-approve, add to or remove from rooms, move to another category, update the estimate, remove from the schedule. Ordered items are skipped by approve and un-approve; approved items are skipped by remove.

Talking about an item

Comments, under the ···, opens that item's conversation. It is one thread, shared with the client: what you write goes onto their selections page, and their replies come back here. The menu entry carries the count, and the ··· itself shows a dot — amber when the client was the last to speak — so you can see there is something to answer without opening the menu.

Tick **Internal — team only** and the comment stays with your team. The client never sees it, and it is marked so nobody on your side mistakes it for something that was sent.

Use it for the things that used to sit in email:

- *"Brushed is a three week lead time — still want it?"* — to the client
- *"Chase Reece on that lead time before we promise it"* — internal

You can remove a comment you wrote yourself. You cannot remove the client's, or another team member's, which is what makes the thread worth anything in a disagreement.

> **Comments and the history are different things** — **History**, under the ···, is the record of what *changed* — product, quantity, approvals. The comment bubble is what was *said*. Both stay with the item.

Chasing a delivery

Once an item is on a purchase order, **Delivery** under the ··· shows where it has actually got to: Ordered → Confirmed → Shipped → Delivered → Installed, with a date for each and a note for whatever the supplier said.

The row carries a small van tag once there is something to report — the status, or the date it is due. It turns red when the expected date has passed and it is not marked delivered, and the **Late – past its expected date** filter gathers those.

> **The dates live on the order, not here** — They belong to the order line, which is what the supplier actually committed to. That is why an item ordered twice — half now, half in six weeks — shows two lines here with their own dates, and why the **Delivery** button on the Purchase Order page edits exactly the same thing. Record it wherever you happen to be; there is one record either way.

Nothing needs clearing when a date moves. "Late" is worked out each time from the expected date and the status, so pushing a date out or marking it delivered removes it by itself.

Before an item is ordered there is nothing here, which is correct: an item that has not been ordered has a selection to finish, not a delivery to chase.

When an allowance is exceeded

This is the conversation that matters, and it goes best at the moment of choosing.

1. **Show them the allowance** and what their choice costs.
2. **Say plainly** that the difference will be a variation.
3. **Record the choice** with both numbers visible.
4. **Raise the variation** promptly — not at the end of the job.

Creating the variation from the schedule

The ⋮ menu on the schedule has **Create variation from selections**. It lists every selection that differs from its allowance — allowance, chosen product, quantity and the difference — with each one ticked, and makes one variation with a line per selection: *Provide 'chosen' in lieu of 'allowance'*, priced at the difference.

Anything already on a variation is shown underneath and left out, whether it went on through this button or was raised by hand, so running it again after new selections only picks up the new ones. Give it the client and a markup structure, and it opens the variation for you to check and send.

The menu item only appears for users who have the Variations module.

Worked example

The client chooses tapware at $1,900 against a $1,200 allowance.

Line	Value
Tapware selected by client	$1,900.00
Less PC allowance in contract	−$1,200.00
Net cost	$700.00
Margin 12%	$84.00
Variation, ex GST	**$784.00**

Showing the allowance as a credit is what makes this readable. A client who sees they are paying the difference accepts it; one who sees a $862 charge for tapware they thought was included does not.

> **Never let selections above allowance accumulate silently** — A client who agrees to eleven small upgrades without seeing a variation for any of them gets a $9,000 surprise at the final claim. Each one was reasonable; the aggregate is what they react to. Raise them as you go.

Selections below allowance

They happen, and they are credits.

Raise them the same way. A documented credit keeps the contract sum accurate, and a client who sees you passing savings back trusts the ones going the other way.

Chasing outstanding selections

Undecided selections hold up the job. The order cannot be raised, and the trade cannot be booked.

Review them weekly against the schedule:

- Anything with a **long lead time** gets chased first
- Anything the **programme needs soon** gets chased next
- Anything holding up an **order** gets chased today

Tell the client what a delay costs in programme terms, at the time. A client who is told *"we need the tile choice by Friday or the tiler moves to another job"* usually decides. One who is told nothing assumes there is no hurry, quite reasonably.

Record the delay — see Calendar and delays. A client-caused delay is often a compensable one, and the record is what supports it.

Sign-off

Get the completed schedule signed.

Print it or export it, send it to the client, and ask them to confirm. Their confirmation is what settles a disagreement about what was chosen — and it makes the schedule the document everyone works from.

Send an updated copy whenever selections change.

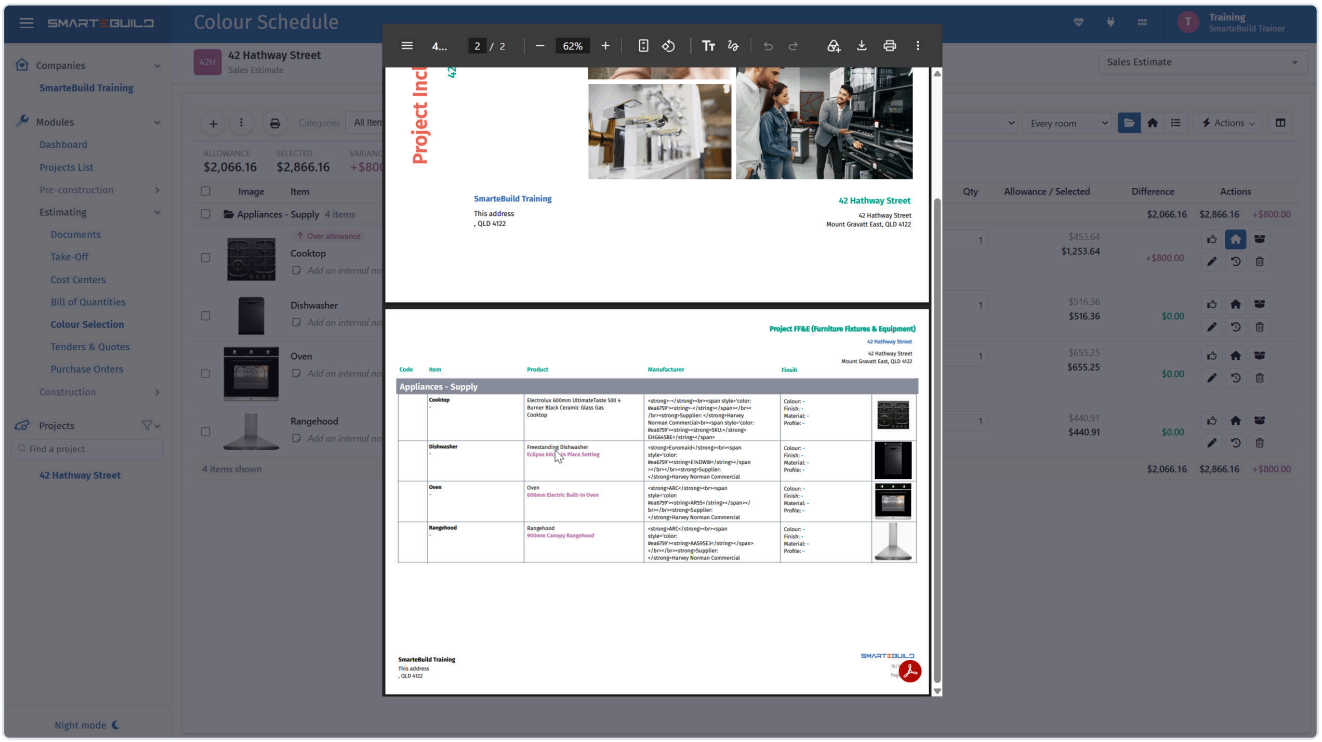
After sign-off

1. Raise the variations for anything above or below allowance.
2. Update the estimate — one button copies the approved selections into the BOQ items and onto any order not yet sent, after showing you what the estimate will change by.
3. Raise the purchase orders — the product SKU goes on the order, which is what prevents substitution.
4. Confirm lead times against the schedule.

28.4 Columns and printing BUILDER PLAN

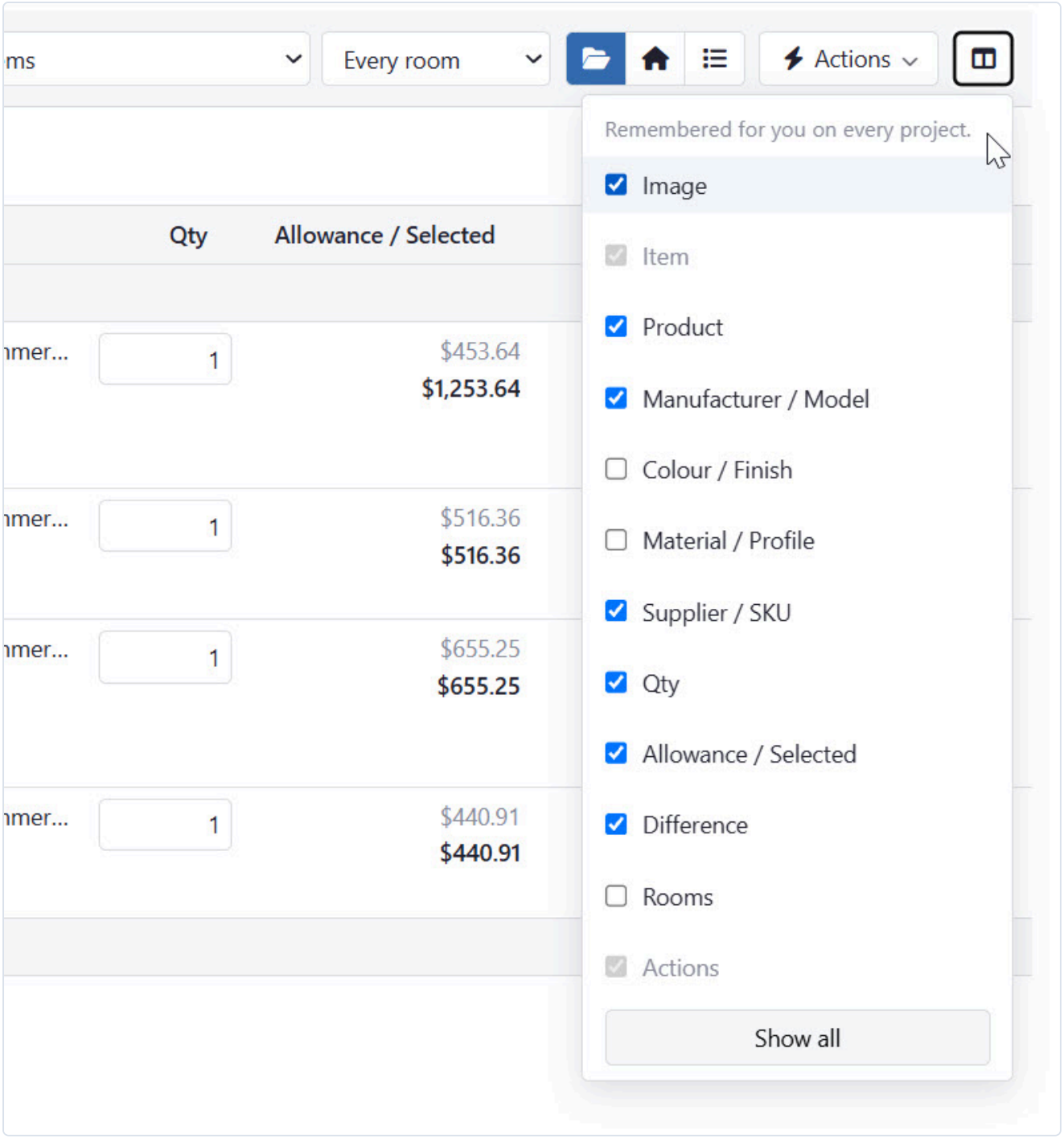
Choosing which columns you see, and producing a selections schedule for the client or the site.

The same schedule serves three audiences, and each needs a different version of it.



The schedule as a document for the client or the trade.

Choosing columns



Show the client what they need and keep your margins to yourself.

The **columns** button at the right of the grid's toolbar lists every column with a tick box. Item and Actions are always shown; everything else is yours to turn off. **Show all** puts them back.

Your choice is remembered against your login, so it follows you between sessions and between projects without affecting colleagues. Column widths can be dragged from the edge of a heading, and those are remembered on the device you set them on.

Turning off the columns you do not use gives the ones you read more width — worth doing on a laptop, where the schedule is wide. On a phone or tablet every column you have ticked is still shown: the row simply stacks into a card.

Finding things

- The **filter box** narrows the schedule as you type — item, product, supplier, SKU, colour, notes.
- The **status** dropdown shows only what is not yet approved, approved, over allowance, or ordered.
- The **room** dropdown shows one room's items.
- The three **view** icons lay the schedule out three ways. **By category** puts a heading over each category with its own allowance, selected total and variance. **By room** puts a heading over each room instead — the order you walk the house with the client — and lists an item under every room it belongs to, with anything not yet assigned to a room at the end. **List** is one flat list. The grid remembers which you used last.
- The two **layout** icons beside them choose how the items themselves are drawn. **Table** is the columned grid — every field, best for checking numbers. **Gallery** draws each item as a card with its product picture, the product and colour under it, and the allowance, selection and difference along the bottom, with the approved, ordered and over-allowance tags on the picture itself. Grouping and layout are independent, so **By room** plus **Gallery** gives you the pictures room by room — the view to walk a site or sit with a client on. Both are remembered per person.
- Click a column heading to sort by it; click again to reverse; a third click returns to the schedule's own order.

The summary

Above the grid: the total **allowance**, the total **selected** (the chosen products at their quantities), the **variance** between the two, and how many items are **approved**. It covers the category you are looking at — the whole schedule when *All Items* is selected — and does not change as you type in the filter box, so the number the client signs against stays put.

> **Some people do not see the money** — The allowance, the selected total, the variance and the *Over allowance* filter only appear for users who hold the **See prices and allowances** permission. Someone without it sees the choices and the rooms and nothing about cost, which is usually right for site staff who work alongside the suppliers being priced. An administrator switches it on under **Users** in the Admin panel - see Module permissions.

Printing

Print, **Print Size** and **Download** produce the schedule as a document.

Print Size controls the layout. A schedule with product images needs more room per row than one without.

The picture sheet

Picture sheet in the **Actions** menu makes the visual version: a page per room, each item as its product photo with the name, brand, colour and price underneath. It opens in a new tab with a **Print or save as PDF** button.

This is the document to hand a client, and the one an installer can work from on site. The columned schedule below is the one for checking numbers; this is the one people actually look at.

It follows whatever is on screen: the filters you have set, and the grouping — so **By room** gives you a page per room, and **By category** a page per category. Set the view first, then open it.

> **If nothing opens** — It opens a new tab, so a pop-up blocker can stop it. Allow pop-ups for SmarteBuild and try again.

What each audience needs

The client

Include	Leave out
Room, category, item	Your cost
The chosen product, with image	Your margin
The allowance	Internal notes
The variation, where one applies	Supplier names

Their version is a record of what they chose and what it costs *them*. It should be readable by someone who does not build for a living.

> **Check the columns before sending to a client** — The most costly mistake in this module is a printed schedule that still shows your cost against the client's price. Look at the output before it goes, every time.

The site

Include	Leave out
Room, category, item	Prices
Product name, SKU, finish, colour	Allowances
Quantities	Variations
Any installation note	

The supervisor needs to know what goes where. They do not need the money, and they work alongside the subcontractors who would be interested in it.

Your office

Everything. Cost, allowance, chosen price, variation status, internal notes.

Include the images

For the client's copy, images are worth the extra pages.

A schedule listing *"Methven Kiri basin mixer, brushed nickel"* is precise and means nothing to most clients. The same row with a picture is a record they can actually check, which is the point — the schedule is only

useful as a dispute-preventer if the client can verify it.

Send it after every change

A selections schedule is a living document until every choice is made. Send an updated copy whenever it changes materially, and keep the sent copies.

Two things follow. The client always has the current version, and you have a dated record of what they were told and when.

Export

Download exports the schedule for filing or for sending.

Attach the signed-off version to the project in Documents. It belongs with the contract documents, and it is one of the first things anyone looks for at handover.

28.5 Sharing the schedule with the client BUILDER PLAN

Sending the client a private link to make and confirm their own selections, reviewing what comes back, and seeing who changed what.

Instead of recording every choice yourself, you can hand the client a private link. They see the schedule on their phone, pick from the products you have put on each item, and confirm. You review and approve. Nothing they do is final until you approve it.

Creating the link

Share with client, under the **Actions** menu in the grid's toolbar, creates the link; the menu shows a count of client-confirmed items waiting for you. It asks for:

- **Client name and email** — prefilled from the project's default client. The name is shown on their page; the email is only used to address the message.
- **Link expires** — never, 30 days or 90 days. You can revoke it at any time regardless.
- **Client can choose between the products on each item** — untick this to send a read-only copy they can confirm but not change.
- **Show allowances, prices and the difference** — untick this for a version with no money on it.

Only one link is live per schedule. Creating a new one replaces the old, which stops working immediately.

Copy puts the link on your clipboard. **Email the link...** opens a message in your own mail program, already addressed and worded, so it goes out with your signature and from your account. SmarteBuild does not send it for you.

> **The link is the key** — Anyone who has the link can open the page. Send it to the client directly, not to a group, and revoke it when the selections are done.

What the client sees

Their page is a plain list built for a phone, grouped by category the way your schedule is, or **by room** when they flip the switch — handy when they are standing in the kitchen deciding on the kitchen. Each category is a closed row with a + button and a count, *2 of 5 confirmed*; it turns teal with a tick once everything in it is confirmed, so the page reads as a checklist before they open anything. **Open all** and **Close all** sit above the list, and the page remembers what they left open. Inside a category:

- Each item with your **note to the client**, its rooms, and the allowance and the running difference (when you have left money on).
- The **products you put on the item**, with pictures where you have them. They tap one.
- A **quantity** box, if you have left that open on the item.
- A box to **tell you something** about the item — *"only if it comes in brushed"*.
- **Confirm this selection**. The item turns teal. They can change their mind until you approve.

Items you have already approved show as *Approved by builder* and cannot be changed there. Items on a sent purchase order show as *Ordered*.

The client never sees your internal notes, your cost, or supplier pricing beyond the selected product's price.

Who the link is for

The same schedule is three documents. The client signs it off, the contractor builds from it, and the supplier quotes against it — and they should not all see the same fields.

When you create a link, **Who is this for?** sets a starting point:

	Client	Contractor	Supplier
Allowances and prices	Yes	No	No
Manufacturer and model	Yes	Yes	Yes
Product code / SKU	No	Yes	Yes
Supplier name	No	Yes	No
Link to the product page	Yes	Yes	No
Comments	Yes	No	No
Can choose products	Yes	No	No

Every switch underneath can still be changed by hand — the presets are a starting point, not a rule. A hidden field is removed on the server before the page is sent, so it is not simply hidden in the browser where somebody could go looking for it.

> **Changing what a live link shows** — Create a new link. Only one is live per schedule, so the new one replaces the old — which also stops the old one working, exactly as you would want when the audience changes.

Questions on an item

Under each item on the client’s page is **Questions about this item?**. It opens the same thread you see behind the speech bubble on your grid, so a question about the tapware stays attached to the tapware instead of arriving as an email with no subject.

This replaced the single comment box the client used to have, where each new comment overwrote the one before it. Their latest comment still shows on your grid row and on the printed schedule.

When the client says no

Under each item the client has **None of these work for me**, which asks them why and sends it straight into that item's conversation.

On your grid the row gets a red **Client said no** tag, and the **Client said no — needs another option** filter gathers them. This is the difference between a client who has not looked yet and one who has looked and does not like anything: they need different phone calls, and before this they looked identical.

Add another product to the item — from a supplier link or your price list — and the client can choose again. Approving the item clears the rejection, because by then you have dealt with it.

Reviewing what comes back

On your grid, an item the client has confirmed carries a **Client confirmed** chip, the client's comment appears under the item name, and **Share with client** shows a count of items waiting for you. Filter the grid to **Client confirmed – to review** to work through them.

For each one: check the product and quantity, read the comment, then **Approve** as usual. Approval is what locks the item and what the order takes its product from. If the choice is not right, change the product or quantity yourself and tell the client — the chip clears when you approve, and the client's page shows the item as approved.

Who changed what

Every item keeps a history. The **clock** button on a row lists each change — product, quantity, approval, notes, rooms, category — with who made it, when, and what it was before. Changes made by the client through their link are marked as the client; changes made in the office are marked with the team member's name.

Two things this is for. First, an un-approve resets the selected product and quantity back to the estimate's defaults, and the history is how you see what was there before. Second, when a client says *"I never chose that"*, the history says whether they did, and when.

> **The history starts when this version was installed** — Changes made before then were not recorded, so older items may show an empty history.

If the client already has a portal

A client with a portal does not need a separate selections link. As soon as the job has a selections schedule, the portal's **Selections** tab shows it, inside the portal, using the portal's own link as the key. Revoking the portal closes the selections with it.

Share with client knows this. When a client on the job has a live portal, the dialog says so first, with **Copy portal link** and **Email...** for that client, and the separate link stays underneath for anyone who should see the selections without the rest of the portal — an interior designer, for instance. If you have made a separate link, its two settings (money shown, products choosable) also apply inside the portal.

Every selection the client confirms through the portal is posted into their chat with you, and the portal's home page lists the newest selection activity — what they chose, what you approved, what went into the estimate.

28.6 Updating the estimate and the orders BUILDER PLAN

Pushing approved selections into the BOQ items and onto unsent purchase orders, with the change to the estimate shown before you confirm.

Approving a selection records what the client chose. It does not, by itself, change the estimate: the BOQ item still carries the product the estimator allowed for, and any purchase order raised from it carries that too. **Update estimate** is the step that makes them agree.

What it does

For each approved selection you tick, it copies into the BOQ item the selection was made against:

- the **chosen product** — the estimate prices from the product, so the item's cost changes the moment it is written;
- the **quantity**, only where the selection's quantity differs from the estimate's. The BOQ item then carries it as a manual quantity, with wastage and rounding switched off, because the selection quantity is already the final figure.

And onto every **purchase order line for that item that has not been sent**: the product, the quantity and the product's price.

It never changes whether an item is included in the estimate, the item's markup, or any order that has already been sent.

Running it

Update estimate, under the **Actions** menu in the grid's toolbar, shows a count of approved selections the estimate does not carry yet. Tick some rows first and use the same button in the bar that appears to limit it to those.

Before anything is written you see, for every eligible selection:

Column	Meaning
Estimate has	The product, quantity and value the BOQ item carries now
Selection	The product, quantity and value that will replace it
Change	The difference, pink when the estimate goes up

Underneath: the purchase orders that will be updated, and the sent orders that will not. The button reads **Update estimate by +$1,234** — the total of the ticked rows — so the figure has to be read to be pressed.

> **Who can run it** — Anyone with the module can preview. Confirming needs **Edit** permission on the estimate, because it rewrites the estimate.

Afterwards

- The row shows an **In estimate** chip. It stays while the selection matches what was pushed; change the product or quantity again and the row goes back to *Estimate not updated*, and the count on the button goes up.
- Each pushed row gets a **pushed** entry in its history (the clock button): what the estimate had, what it has now, the orders that were updated, and — where the quantity changed — the quantity settings the BOQ item had before, so it can be put back by hand.
- The **Approved – not in estimate yet** filter lists whatever is still waiting.

Sent orders

A sent order is a document the supplier already has. The push lists it and leaves it alone. If the product on it has to change, do that from the order itself and re-send it; the order's own **match colour selection** button pulls the approved product across.

The whole process

1. **Estimate.** The estimator prices the job and imports the categories that need choosing into the selections schedule — see Building the schedule.
2. **Select.** The interior consultant and the client make the choices, in the office or through the client's link.
3. **Approve.** The builder approves each selection. Anything over its allowance is raised as a variation.
4. **Update the estimate.** Once approved, the selections are pushed into the BOQ items — with the change to the estimate shown and confirmed first.
5. **Update the orders.** The same push updates every purchase order that has not been sent. Orders raised afterwards pick the product up from the BOQ item.

CHAPTER 29

Schedule and booking

29.1 The seven views BUILDER PLAN

Tasks, Schedule, Calendar, Call up, Bookings, Procurement and Cash flow - what each one is for and which to use when.

Schedule & Booking is seven views onto one set of tasks. They share the same underlying data, so a change in one appears in all of them.

Schedule & Booking in the left-hand menu opens the **Schedule** — the Gantt — straight away. The older read-only schedule chart has gone; old links to it now land on the Schedule.

View	What it is for
Tasks	The list. Add, edit and check off work.
Schedule	The Gantt — durations, dependencies, the critical path.
Calendar	What is happening on which day, across every job.
Call up	Telling subcontractors when to come.
Bookings	Who has confirmed.
Procurement	What to choose and order, and by when.
Cash flow	What the job costs, over time.

> **The client can see a version of this — Share the schedule** on the project's Client portal card gives the client a read-only Schedule tab — stages, dates, percent complete and a *running late* flag. They never see task cost, suppliers, call-ups, delays, float or the critical path. It is off unless you turn it on. See Sharing documents, photos and selections.

Which to use when

Planning a job — start in **Tasks** to get the work down, then move to **Schedule** to give it durations and dependencies.

Running a week — Calendar and **Call up**. What is on this week, and who needs telling. The Calendar is the only view that spans every job at once, so it is also the answer to "what is my site manager doing this week?"

Checking a subcontractor is coming — Bookings.

Making sure fittings and materials are ordered in time — Procurement. See Procurement.

Answering "when will we be finished?" — Schedule. The Gantt is the only view that answers it, because it is the only one that understands dependencies.

Answering "when do we need the money?" — Cash flow.

Briefing a site meeting, or answering "who is on where?" — the **Reports** menu on the Schedule, which covers this job or every job. See Reports and printing.

> **Do not try to plan in the calendar** — The calendar shows what is scheduled; it does not understand why. Move a task there and nothing downstream follows. Plan in the Schedule, where dependencies mean a change flows through the rest of the job.

Tasks are the unit

Everything here is a task. A task can carry:

- a **duration** and **dates**
- **predecessors**, so it follows other work
- a **cost code** and a **supplier**, so it connects to the estimate
- a **cost**, or a **link to an order**
- a **call-up period**, so the subcontractor is told in time

The more of these you fill in, the more the other five views can do. A task with a name and nothing else appears in the list and does nothing anywhere else.

How much detail

Enough that each task is one trade's work in one visit, and someone could be called up for it.

Too coarse	About right	Too fine
`Build house`	`Frame – first floor`	`Install stud 14`

Twenty to sixty tasks covers most residential jobs. Beyond a couple of hundred you spend more time maintaining the schedule than the schedule saves you.

Connecting to the rest of the job

The schedule is only worth keeping current if it connects to something. Three connections matter:

- **Cost codes** tie tasks back to the estimate
- **Orders** tie a task to what has been committed for it
- **Contract stages** can be linked to tasks, so reaching a stage flags the claim as due — see Contract stages

In this section

- Tasks
- Building a schedule
- The Gantt
- Resources and cost
- Call-up sheets
- Bookings and confirmations

- Calendar and delays
- Cash flow
- Reports and printing

29.2 Tasks BUILDER PLAN

Every field on a task, how to structure them into parents and children, and keeping the list current as the job runs.

Tasks are the unit of everything in this module. The **Tasks** view is the list of them.

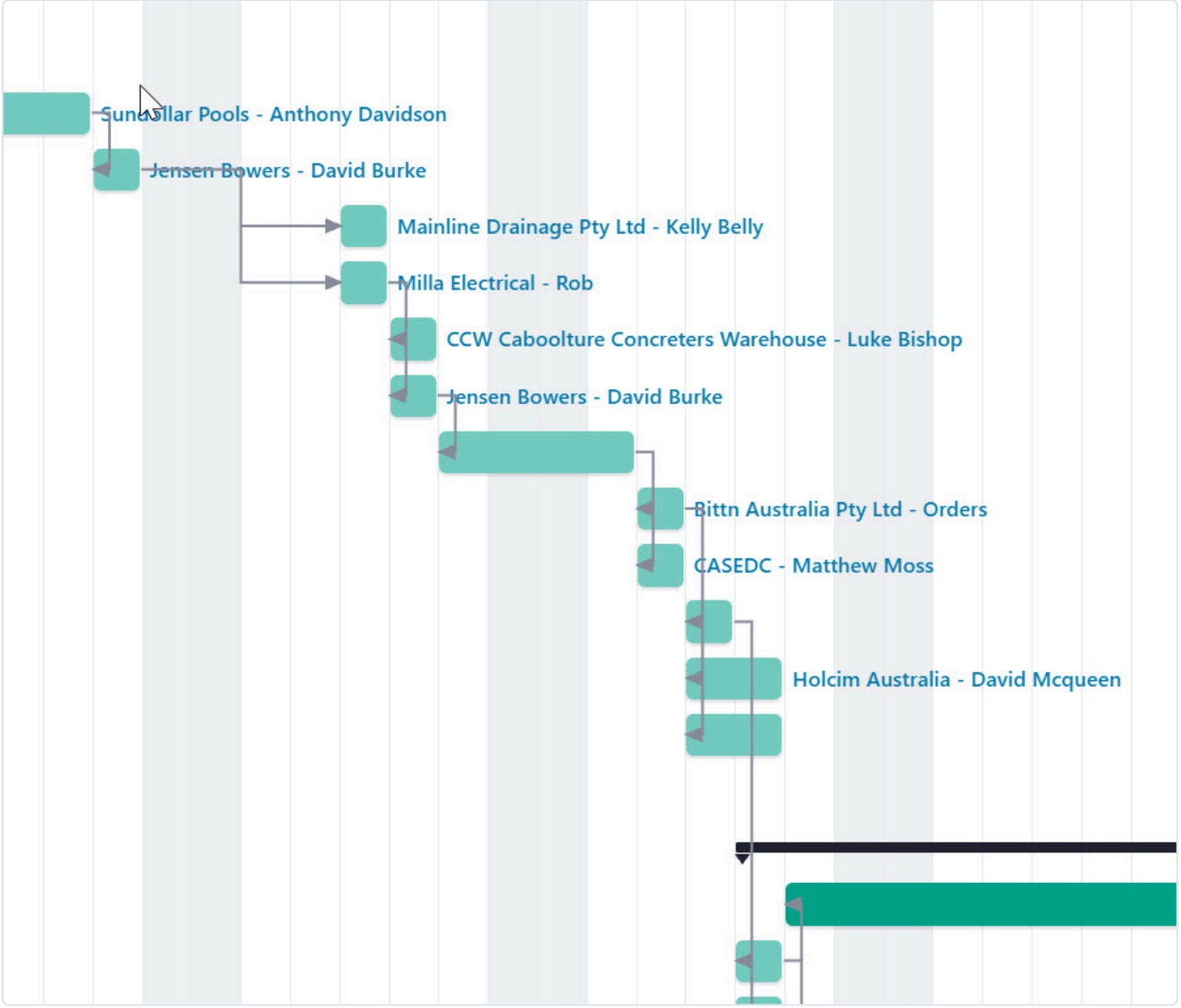
TASK	START	FINISH	DUR	%	DELAY	ACTIONS
Slab pour	21 May 2025	21 May 2025	1d	100%		
Slab Concrete	21 May 2025	22 May 2025	2d	100%		
Slab Pump	21 May 2025	22 May 2025	2d	100%		
Project Start Date	21 Apr 2025	21 Apr 2025	1d	100%		
Frame Stage	22 May 2025	27 Jun 2025	1d	0%		
Frame Manufacturer delay	23 May 2025	05 Jun 2025	10d	0%		
Site Backblade	22 May 2025	22 May 2025	1d	100%		
Perimeter Termite Control	22 May 2025	22 May 2025	1d	100%		
Skip bin delivery	23 May 2025	23 May 2025	1d	0%		
Delivery of Frame and Tru...	06 Jun 2025	06 Jun 2025	1d	100%		
Frame Hardware Delivery	09 Jun 2025	09 Jun 2025	1d	100%		
Frame Installation	09 Jun 2025	27 Jun 2025	15d	100%		
Crane Hire	10 Jun 2025	10 Jun 2025	1d	100%		
Enclosed Stage	30 Jun 2025	15 Sept 2025	1d	0%		
First Floor Fall Guard & Vo...	30 Jun 2025	30 Jun 2025	1d	100%		
Install Aluminium Scaffold	01 Jul 2025	01 Jul 2025	1d	0%		

Each task with its dates, its trade and how far along it is.

The fields

Field	What it does
Name	What the work is
Parent	Groups it under a summary task
Duration	How long it takes
Start Date	When it is planned to start
Actual Start Date	When it actually started
Actual Finish Date	When it actually finished
Predecessor	What has to happen first
Link type	How the two are tied: finish to start, start to start, finish to finish or start to finish - see Link types
Lag	Waiting time added to the link
Status	Where it is up to
Cost Code	Which trade it belongs to
Supplier	Who is doing it
Contact	Who at that supplier
Cost / Select Cost Method	What it costs
Link to Order	The purchase order for this work
Call up (weeks)	How far ahead to call the trade
Note	Anything else
Sorting Index	Order among siblings

Structure



A dependency is what makes the finish date tell the truth.

Parent builds a hierarchy — a summary task with the real work underneath it.

```
Frame
  Frame — ground floor
  Frame — first floor
  Frame inspection
Roof
  Roof trusses
  Roof battens
  Roof tiles
```

Summary tasks roll up their children's dates and costs, so you get a readable overview that still has real detail behind it.

Keep it two levels for a house. Deeper structures look organised and take longer to maintain than they save.

Naming

Name a task so that someone reading it in a call-up sheet knows what to bring.

Weak	Better
`Concrete`	`Slab pour – 18.6 m³ N32`
`Plumber`	`Plumbing rough-in – ground floor`
`Fix out`	`Internal doors and architraves`

The call-up sheet carries this name to the subcontractor. `Concrete` on a Tuesday tells them nothing about whether they are pouring or stripping formwork.

Notes

The task panel's **Details** tab has a **Notes** box for anything that does not fit a field — the gate code, "pump booked with Metro", "client wants to be there". It saves when you click away. Notes also come out in the **Export tasks to Excel** report.

Deleting a task

Delete task asks before anything goes. For a group — a task with sub-tasks — it asks which you mean:

- **Delete the group only - keep its tasks** — only the heading goes; the tasks under it move up to the top level of the schedule and keep their dates and links.
- **Delete the group and everything in it** — the whole branch goes.

Deleted the wrong thing? **Undo** on the top toolbar brings it back — see Undo.

Tasks from purchase orders

Schedule › Add tasks from purchase orders... gives every purchase order on this job that has no task yet a task of its own. It skips orders that are deleted, voided or merged.

Each new task:

- is named after the order;
- is connected to the order at 100%, so its cost and trade come from the order;
- goes at the foot of the schedule, with the number of days you choose.

Nothing already in the schedule changes, and pressing it again adds nothing new — so it is safe to run whenever orders have been raised since. Link the new tasks into the programme afterwards. You need the **See Orders** permission to use it.

Actual dates

Actual Start Date and **Actual Finish Date** are what turn the schedule from a plan into a record.

Fill them in as the job runs. Two things follow: the schedule moves to where the job really is, so slippage shows against your baseline rather than being assumed; and at the end of the job you have real durations, which is the best source of estimates for the next one.

> **Actual dates are how you get better at scheduling** — Most builders plan from memory and are consistently optimistic about the same trades. Recorded actuals turn that into a number — "the plasterer always takes eight days, not five" — which you can plan with.

Status

Status tracks where a task is. Combined with the view filters, it is what keeps a long schedule readable:

Filter	Shows
Hide Finished Tasks	Only what is left
Show Due Tasks	What is coming up
Show Finished Tasks	The record of what is done

Hide Finished Tasks is the one to leave on while running a job. Six months in, two-thirds of the schedule is history and it only gets in the way.

Keeping it current

A schedule nobody updates is worse than no schedule, because people rely on it.

The minimum that works:

1. Mark tasks finished as they finish.
2. Enter actual start dates when work begins.
3. When something slips, change it in the **Schedule** view so dependencies follow.
4. Add tasks for variation work as it is approved.

Ten minutes a week. Step three is the one that matters — updating a date in the Tasks list changes one task, while doing it in the Gantt moves everything that depends on it. See Building a schedule.

29.3 Building a schedule BUILDER PLAN

Durations, predecessors, the four link types and lag - how to build a schedule that reschedules itself when something slips, and how to move it to and from MS Project.

A list of tasks with dates typed on them is a wall planner. A schedule with **dependencies** is something that answers questions — and reschedules itself when the weather closes in.

The difference is predecessors.

Duration

Duration is how long a task takes, in working days.

Use the duration the trade actually takes on site, not the duration you hope for. The schedule is only useful if it is honest, and an optimistic schedule produces call-ups that are wrong every time.

Predecessors

Predecessor and **Predecessor Task** say what has to happen before this task can start.

This is what makes the schedule dynamic. Set the frame to follow the slab, and if the slab slips a week the frame moves with it — and so does everything after the frame.

> **Link tasks, do not type dates** — The temptation is to type start dates on everything, because it is quicker. Then the first delay means retyping thirty dates, so nobody does, and the schedule is wrong within a fortnight. Ten minutes spent on predecessors at the start saves that every time something moves.

The task panel

Click a task's name to open its panel on the right. The top shows the task's dates and working days, and a tag if it is on the **critical path**. Otherwise the tag shows how many days of **float** it has. Below that are two tabs:

- **Details**:
  - **General**: the name and the stage.
  - **Notes**: anything that does not fit a field. It saves when you click away.
  - **Timing & progress**: duration, percent complete (with a bar), and two switches. **Milestone** makes it a zero-day diamond. **Auto-schedule** off pins the task to a start date you type, and the panel's top then shows **Fixed start**.
- **Links**: what the task waits for and what waits for it (see below). The number on the tab is how many links the task has. The panel stays on the tab you chose when you click another task, so you can work through links task by task.

Changes save as you leave each box. **Done** saves and closes the panel, and **Delete task** is at the bottom left. It asks first — see Deleting a task.

Link types

Most links say "this starts when that finishes". Not every trade works that way, so a link can be any of the four types MS Project uses:

Type	Means	Typical use
FS Finish to start	This starts after that one finishes	Frame after slab. The usual one
SS Start to start	This starts when that one starts	Plumbing starts two days after the frame starts, not after it finishes
FF Finish to finish	This finishes when that one finishes	Clean-up finishes with the painting
SF Start to finish	This finishes when that one starts	Temporary fencing stays up until the landscaper starts

To pick the type:

- **When linking**: open **Link tasks** above the chart and pick the type. Each one has a small picture of what it does. Then click the first task on the chart, then the one linked to it. You can keep linking pairs in

the same type; press **Done** (or Esc) when finished.

- **Afterwards**: open the task and pick the **Links** tab. It lists what it waits for (**Predecessors**) and what waits for it (**Successors**). Each linked task has a type box and a lag box, and a line underneath reads the link out, for example "This task starts 2 working days after Slab pour finishes". Change either box and the dates move straight away.

The arrows on the Gantt show the type: they leave from the start or the finish of one bar and arrive at the start or the finish of the other. Hover over an arrow to read it, for example "Frame → Plumbing: Start to start, +2 days".

> **Start to start is how you overlap trades** — If the plumber can start once two days of frame are up, that is a start-to-start link with 2 days of lag. It is the honest way to overlap trades, and the dates still move if the frame moves.

Lag

Lag is waiting time added to a link. On a finish-to-start link it is the wait after the predecessor finishes, before this task can start. On a start-to-start link it is the wait after the predecessor starts.

It is how you model curing, drying, delivery lead times and inspections:

Between	Lag	Why
Slab pour → frame	3 days	Concrete cure
Render → paint	5 days	Drying
Order windows → install	30 days	Lead time
Frame → frame inspection	1 day	Booking the inspector

Lag is where most real schedules go wrong. A schedule with no lag has the frame starting the morning after the pour, which nobody does, and the whole programme is optimistic by the sum of the missing waits.

Scheduling

Scheduling controls how a task is placed — driven by its predecessors, or fixed to a date.

Most tasks should be driven by predecessors. Fix a task to a date only when it truly is fixed — a council inspection with a booked slot, a crane hired for a specific day, a client walkthrough.

Too many fixed dates and the schedule stops rescheduling itself, which was the point.

Worked example: the Hendricks extension

Task	Duration	Predecessor	Lag
Site set-up	1 d	—	—
Excavate	2 d	Site set-up	—
Formwork and reo	3 d	Excavate	—
Slab pour	1 d	Formwork and reo	—
Frame	6 d	Slab pour	3 d
Frame inspection	1 d	Frame	1 d
Roof trusses	2 d	Frame inspection	—
Roof tiles	3 d	Roof trusses	1 d
Windows	2 d	Roof tiles	—
External cladding	5 d	Windows	—
Plumbing rough-in	3 d	Frame inspection	—
Electrical rough-in	3 d	Frame inspection	—
Insulation	1 d	Plumbing rough-in, Electrical rough-in	—
Plasterboard	5 d	Insulation	—

Two things worth noticing.

The 3-day lag after the slab pour is the concrete curing. Without it the frame starts the next morning, and the whole programme reads three days optimistic.

Plumbing and electrical both follow frame inspection, and insulation follows both. They run in parallel, and insulation waits for whichever finishes last. That is a dependency you cannot express by typing dates.

Three ways to start

You do not have to type the first schedule out. The **Schedule** menu on the toolbar of the **Tasks** tab has these starting points, and all of them **replace** whatever schedule the job already has, so they are for starting, not for adding to. Each one asks first.

They live on Tasks only. You will not find them on Bookings or Cash flow, because what those pages hold — resources, lead times, call-up status, actual dates — is exactly what these throw away.

Start with	What you get
Import a template	A ready-made programme: tasks, durations and links. The list holds your own template jobs and the ones that come with SmarteBuild
Build from cost codes	One task per cost code on this job, in cost-code order, each one after the last
Import from MS Project	A programme someone built in Microsoft Project: tasks, summary tasks, every link with its type and lag, the calendar and the people. See MS Project below
Building one from scratch	An empty chart you fill in yourself — see below

Clear schedule, at the bottom of the same menu, is the way to get back to an empty chart on a job that already has one. It deletes every task, along with their links, resource bookings and recorded delays. Your **stages** are kept — delete those with the ⚙ beside the Stage filter if you want them gone too. It asks first, tells you how many tasks are about to go. **Undo** straight afterwards brings the tasks back, as new copies — see Undo.

The same menu also holds **Copy schedule** and **Paste schedule**, for reusing one job's programme on another.

Import a template

Pick a template under **Import a template** and its tasks, durations, links and stages are copied in. Nothing personal to that template comes with it: no suppliers, no bookings, no costs, no notes — you set those for this job.

Your own jobs appear here when the estimate is ticked as a **Template** and has a schedule on it, so a programme you have refined on one house can be the starting point for the next.

Build from cost codes

This one starts from the estimate rather than from a template, which is the fastest way to get a first programme on a job you have already priced.

- Every cost code on the job becomes one task, named after the cost code.
- They run in cost-code order, each starting when the one before it finishes.
- You say how long each task takes; 3 days is offered.
- Cost codes set to **Not Required** are left out.
- Each task is linked to its cost code, so the task's cost is the money in that part of the estimate, and Cash Flow works straight away.

It is a starting point, not a programme: a strict one-after-another chain is never how a job really runs. Go through it afterwards and set the real durations, let the trades that overlap overlap, and add lag for cures and lead times.

MS Project

The **Schedule** menu has an **MS Project** section with two commands. SmarteBuild swaps schedules with MS Project as an **XML file**. MS Project opens and saves XML itself, so nothing extra is needed. SmarteBuild cannot read MS Project's own **.mpp** files, so save as XML first.

Export to MS Project

Export to MS Project downloads the schedule as an .xml file. In MS Project, use **File › Open**, choose the file and open it.

What goes across:

- Every task, with parent tasks as MS Project **summary tasks**, in the same order.
- Every link, with its type (FS, SS, FF or SF) and its lag.
- Durations in working days. Recorded delays are added to the duration, so the bars land on the same dates.
- Tasks fixed to a date come across as **manually scheduled** on that date.
- Percent complete and actual start and finish dates.
- The job's working days and holidays, as the project calendar.
- The person on each task, as a resource with their supplier as the resource group.
- Stages, in a custom column called **Stage**.

Costs, bookings, call-up status and weather do not go across. MS Project has nowhere to put them.

Import from MS Project

1. In MS Project, use **File › Save As** and choose **XML Format (*.xml)**.
2. In SmarteBuild, open the job's **Tasks** tab, then **Schedule › Import from MS Project...**, and pick the file.
3. Read the summary before you press anything. It shows the tasks, the links by type, the calendar, the people it found, and the finish date SmarteBuild works out beside the one MS Project saved. If the two finish dates match, the programme came across intact.
4. Untick **Use the file's working days and holidays** if you want to keep this job's own calendar.
5. Press **Import**, or **Replace and import** if the job already has a schedule.

Nothing changes until step 5. The import replaces the whole schedule — tasks, links, bookings and delays — in one go, so if anything goes wrong nothing is half-done.

People are matched by name against your suppliers' contacts. Anyone not found is listed, and their tasks come in without a person. Add them under **Suppliers** and assign them afterwards.

Worth knowing lists anything that could not come across exactly:

MS Project has	SmarteBuild does
Part-day durations (4 hours, 1.5 days)	Rounds up to whole working days. A half day still takes a day on site
Links on summary tasks	Moves each link onto the tasks inside the summary that it drives, so the dates stay the same
Lag in calendar days ("2 edays")	Converts it to working days
Lag as a percentage	Converts it to days from the predecessor's duration
A "start no earlier than" date	Keeps it as the task's start date when the task has no links. When it also has links, SmarteBuild follows the links, so check that task
"Must start on" and manually scheduled tasks	Fixes the task to that date
"As late as possible" and other constraints	Schedules the task as soon as possible

> **Milestones after a finish** — A milestone that follows a task's finish (a handover after the final clean, say) sits on the **next** working day in SmarteBuild. MS Project shows it at the end of the same day. It is the same moment, drawn a day apart, so when the last task is a milestone the finish date can read one day later than MS Project's.

Building one from scratch

1. **List the tasks** in the Tasks view, in rough build order.
2. **Set durations**, honestly.
3. **Link predecessors** down the chain.
4. **Add lag** for cures, drying, lead times and inspections.
5. **Look at the finish date.** If it is wrong, the schedule is telling you something — usually that a duration or a lag is unrealistic.
6. **Fix only the genuinely fixed dates.**

Step five is the point of the exercise. A schedule that produces a finish date you do not believe is more useful than no schedule, because you can go and find the assumption you disagree with.

When something slips

Change the task that slipped — its actual dates, or its duration — and let everything downstream move.

Resist adjusting later tasks by hand to protect the finish date. That hides the slip, and the schedule stops being a forecast. If the finish date has moved, that is information you and the client both need.

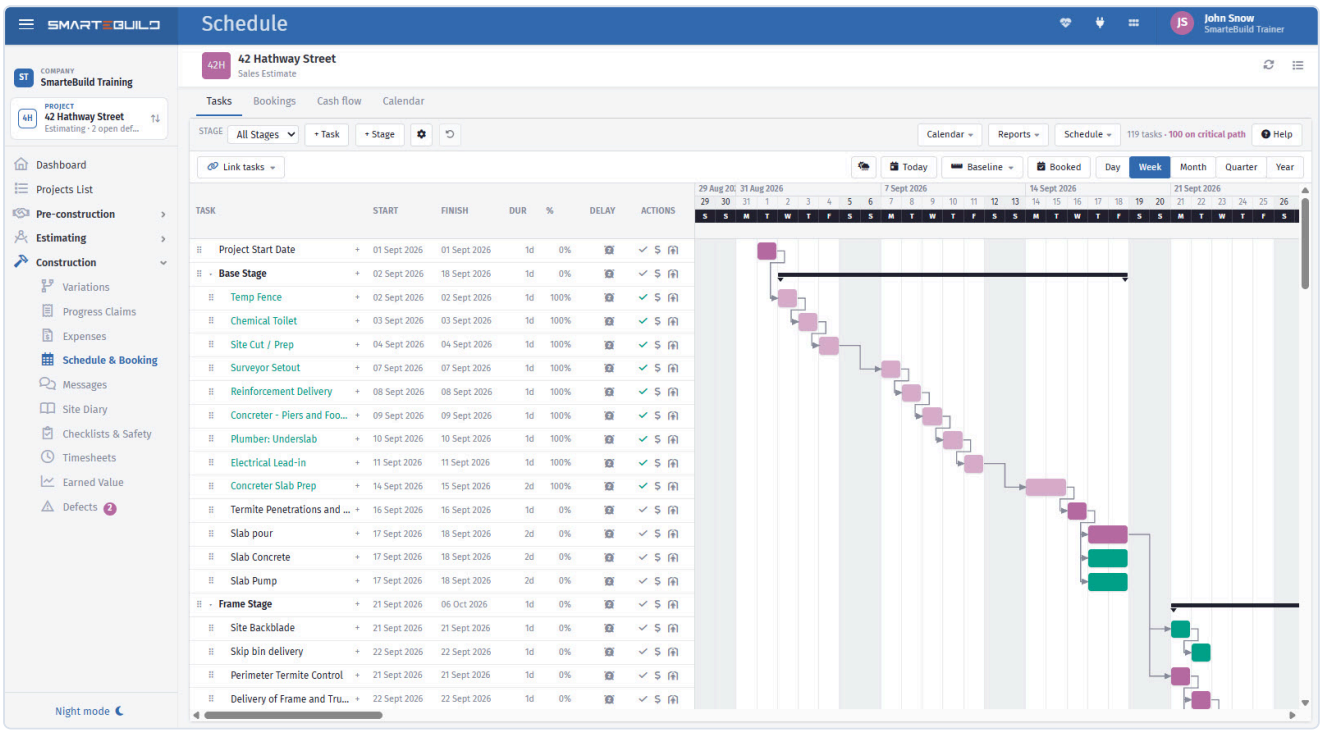
29.4 The Gantt BUILDER PLAN

Reading the Gantt chart, zooming, the critical path, and comparing the plan with bookings and baselines to

see slippage.

The **Schedule** view is the Gantt chart — tasks as bars along a timeline, with the dependencies drawn between them.

It is the only view that answers "when will we be finished?", because it is the only one that understands what depends on what.



Move a task and everything depending on it moves with it.

Reading it

Each task is a bar: its position is when it happens, its length is how long it takes. Lines between bars are dependencies.

Working left to right along the linked bars shows you the chain that determines the finish date.

The chart shades the days the site does not work — this job's non-working days and the company holidays — so a bar that stretches over a weekend or the Christmas break is visibly doing so. Which days count is set under **Calendar** — see Working days.

Zooming in and out

Day, **Week**, **Month**, **Quarter** and **Year**, on the chart's toolbar, set how much of the job fits on the screen. **Day** is for sorting out the next fortnight; **Quarter** shows whole quarters and **Year** at least twelve months, which is the view for "how does the whole job sit?"

The zoom you pick is remembered in your browser. Groups you fold away are remembered too, for each job, so a long schedule opens the way you left it.

Trade double-booked

A small orange **warning triangle** beside a task's name means that task's trade is also booked on **another of your jobs** on overlapping days. The trade is the supplier on the task — from its person, or from its purchase order. Hover the triangle, or open the task, to see which job and which days.

Overlaps inside the same job are ignored, and so are finished tasks. The other job is only named if you have access to it. Like the Calendar's clash warning, it means "check", not "wrong" — a bigger trade may run two crews.

Today

Today's column is shaded **blue** from top to bottom, and its date in the header is solid blue, so "where are we against the plan" is the first thing you see. The chart always stretches far enough to include today, even on a job that has not started yet or finished long ago.

Today, above the chart, scrolls straight back to it after you have wandered off along the timeline.

The weather row

Above the bars, in the **Day** and **Week** zooms, is a row of forecast icons — one per day for the next week or so. Hover any of them for the detail: what it will do, the temperature range, the chance of rain, how much, and the wind when it is strong enough to matter.

A day the forecast expects to be **wet is shaded yellow**. That means a 50% or better chance of rain, or 5mm or more — roughly the point at which a pour or a roof gets moved. It is a warning, not a rule: nothing on the schedule changes and no date moves.

The forecast is for the site. It comes from the project's **postcode**, set under **Edit Project** — or, for an older project that has not been re-saved since, from a suburb or postcode in its address lines. Two things follow from that:

- A project with no suburb or postcode gets no icons, and the row says so. Add them under Edit Project and the forecast follows the site.
- The row only appears in the **Day** and **Week** zooms. From **Month** out, a day column is a few pixels wide, which is not enough for an icon to mean anything.

The forecast keeps itself current. A page left open checks again every few hours, and as soon as a new day starts — so a Gantt left up on the office screen overnight shows today's outlook in the morning, not yesterday's. **Refresh weather**, above the chart, gets the latest straight away.

Days beyond the forecast simply have no icon. That gap is the honest answer — a ten-day outlook does not exist yet.

The critical path

The **critical path** is the longest chain of dependent tasks through the job. Every task on it directly determines the completion date: delay one by a day and the job finishes a day later.

Tasks off the critical path have **float** — slack before they start affecting anything.

This is the most useful single idea in scheduling, because it tells you where to spend your attention.

Worked example

From the extension schedule, after frame inspection two chains run in parallel:

Chain	Tasks	Total
A	Roof trusses (2) → Roof tiles (3, +1 lag) → Windows (2) → Cladding (5)	13 d
B	Plumbing rough-in (3) → Insulation (1) → Plasterboard (5)	9 d

Chain A is critical. Chain B has four days of float.

So if the plumber is two days late, it costs nothing — there is float. If the roof tiler is two days late, the job finishes two days later.

That tells you exactly who to ring on Monday morning, and it is not obvious from a task list.

> **Chase the critical path, not the loudest problem** — The trade making the most noise is rarely the one determining your finish date. Look at the Gantt before deciding what to chase.

Planned against booked

Booked, on the chart's toolbar, draws each task's booked dates — the ones on Bookings — as a thin **blue line** under its planned bar. Where the two sit apart, the trade has been told one thing and the programme now says another. That is the one to ring about.

Baselines: planned against what you promised

A **baseline** is a snapshot of the programme on a given day. Save one when the client agrees the programme, and from then on the chart shows how far the job has moved from it.

Under **Baseline** on the chart's toolbar:

- **Save today's plan as a baseline...** — give it a name, such as *Contract programme*.
- Pick which saved baseline to compare with, or **No baseline** to hide it.
- Delete one you no longer need.

Each job keeps its five newest baselines.

With a baseline chosen, a thin **grey line** above each bar shows where that task sat in the baseline. Hover it for the difference in working days — *3 days later than baseline*. The task panel shows the same as a tag (*5d later than baseline* or *On baseline*), and the summary on the top toolbar gives the whole job, such as · *4 days behind baseline*.

Slippage becomes visible as a pattern rather than a series of individual excuses. Three trades in a row starting two days late is not three unrelated problems — it is a schedule that was optimistic from the slab onwards.

> **Save a new baseline after an approved variation** — When a variation that adds time is approved, the programme the client agreed to has changed. Save a new baseline — *After variation 3*, say — so "behind" measures you against what was actually agreed, not against a programme that no longer applies.

Adjusting

Drag a bar to move a task, or change its duration. Anything depending on it follows.

That is the whole reason to work here rather than in the Calendar. Moving a date in the calendar changes one task; moving it here moves everything that depends on it, which is what actually happens on site.

Undo

The round-arrow **Undo** button on the top toolbar — or **Ctrl+Z** when you are not typing in a box — takes back your last change to this job's schedule. Hover the button first: it names what it will undo, such as *Undo: Deleted "Frame"*. Press it again to go further back.

It covers task edits and deletes, links, delays, holidays, the working week, stages, paste and import template, build from cost codes, clear schedule, MS Project import, adding tasks from purchase orders, and ticking a task done on the Calendar.

It will not undo, and says why, when:

- **someone else made the last change** — only they can undo it;
- **the schedule has changed since** on another screen, the Calendar, the phone app or through a call-up — undoing would throw that work away;
- you are trying to go back past an undone **Clear**, **Import** or **Build** — those bring the tasks back as new copies, so there is no earlier version to return to.

Call-up statuses and emails are never undone — an email cannot be unsent. Company-wide holidays are not part of a job's undo either.

Ordering the task list

The handle at the left of a row — the six dots — moves the **task itself** rather than its dates. Where you drop it decides what happens:

Drop it	What happens
On the **top edge** of another task	It lands immediately above that task, alongside it
On the **bottom edge**	Immediately below it, alongside it
In the **middle** of another task	It becomes a **sub-task** of that one

The middle of a row is the useful one: it groups work under a summary task without opening the task and setting its **Parent** by hand. A task cannot be dropped into its own sub-tasks, so you cannot lose a branch inside itself by accident.

Add sub-task on a row creates a new task already parented underneath it. Any task with sub-tasks gets a small arrow to fold them away, which is what keeps a long job readable when you only care about the stage you are on.

> **Group before you fix dates** — Getting the structure right first — stages as parents, the real work underneath — makes everything after it easier: the critical path reads properly, printing collapses to something a client can follow, and moving a whole stage becomes one drag instead of eleven.

When something slips

1. Update the task that slipped — actual dates, or a longer duration.
2. Let the schedule reflow.
3. Look at the new finish date.
4. If it has moved and that matters, look at the **critical path** for where to recover time.
5. Tell the client if the completion date has moved.

Step five is not optional on a contract with a completion date. A client told at the time is managing an expectation; one told at the end is being presented with a fact.

Recovering time

Only two things shorten a job, and both apply to the critical path:

- **Shorten a task** — more people, longer days, a different method.
- **Overlap tasks** — start something before its predecessor fully finishes, where it is safe to. A start-to-start link with some lag does this without typing dates — see Link types.

Shortening a task with float achieves nothing at all. This is the most common wasted effort in running a programme.

Printing and sharing

Reports › Print or save as PDF... prints the chart landscape — the task list on the left, the bars scaled to fit the page. Print the whole job, a two-, three- or six-week **lookahead** for a site meeting, or dates you choose. Choose **Save as PDF** as the printer to get a file. See Reports and printing for the options and for the job and all-jobs reports.

For a client, a stage-level print is usually right — they want the shape and the finish date, not sixty bars. A client with portal access can also see the schedule online — see Overview.

To hand the programme to someone who works in Microsoft Project, use **Schedule › Export to MS Project** instead — see MS Project.

On a phone

On a phone the chart does not fit, so the Schedule shows **task cards** instead. Each card has the dates, the working days, a progress bar, the trade and any tags — **Critical**, **Late**, a delay, **Trade double-booked** — and a tick to mark it done.

Filter the cards with **Unfinished**, **Next 2 weeks**, **Late** or **All**. Tap a card to open its task panel full screen.

29.5 Resources and cost BUILDER PLAN

Assigning a supplier to a task, costing it manually or from a purchase order, and connecting the schedule to the estimate.

A task with a supplier and a cost stops being just a bar on a chart. It becomes the thing that drives call-ups and cash flow.

Assigning a supplier

Supplier and **Contact** say who is doing the work.

This is what makes call-up sheets and bookings work — both are built from the supplier on the task. A task with no supplier cannot be called up, because there is nobody to call.

Estimate a task

Select Cost Method chooses where the task's cost comes from:

Method	Cost comes from	Use when
Manual	A figure you type	No order exists yet
From an order	The linked purchase order	The work is ordered

Link to Order ties the task to its purchase order.

Prefer the order

A task costed from its order is right by construction, and stays right when the order is revised. A manually costed task is a number someone typed once, and it goes stale silently.

Use manual costs while planning, before orders exist, then link the orders as they are raised.

> **Linking orders makes the cash flow real** — Cash flow built from manual estimates is a guess. Cash flow built from linked orders is what you have actually committed, timed to when it is due. The second is worth looking at; the first is worth roughly what you put into it.

Cost codes

Cost Code ties the task back to the estimate — the same trade breakdown the BOQ uses. See Cost Codes.

With it set, the schedule and the estimate speak the same language, so you can ask what a trade was allowed, what it was committed at, and when it is scheduled, and get answers that line up.

Payment terms

Payment Method and **Payment Extra days** describe when the money actually leaves.

This matters for cash flow. Work done in week 6 on 30-day terms is paid in week 10, and the difference between those two dates is precisely the gap a builder has to fund. Set the terms and the cash flow view times the outflow properly.

Worked example

The slab pour task, fully set up:

Field	Value
Name	`Slab pour — 18.6 m³ N32`
Duration	1 day
Predecessor	`Formwork and reo`
Cost Code	`310 Slab`
Supplier	`Barwon Concrete`
Contact	`Jim Whelan`
Cost Method	From order
Link to Order	`PO 2026-041-03` — $5,099.92
Call up (weeks)	1
Payment Method	30 days

That one task now drives four things:

- the **Gantt** knows when it happens and what follows it
- the **call-up sheet** tells Jim a week ahead
- **bookings** tracks whether he confirmed
- **cash flow** shows $5,099.92 leaving 30 days after the pour

None of which needed anything typed twice.

Tasks with no cost

Plenty of tasks legitimately have none — inspections, client walkthroughs, cure periods, waiting on a delivery.

Leave the cost blank. They still matter for the programme, which is what they are there for.

Keeping cost and schedule aligned

Two habits:

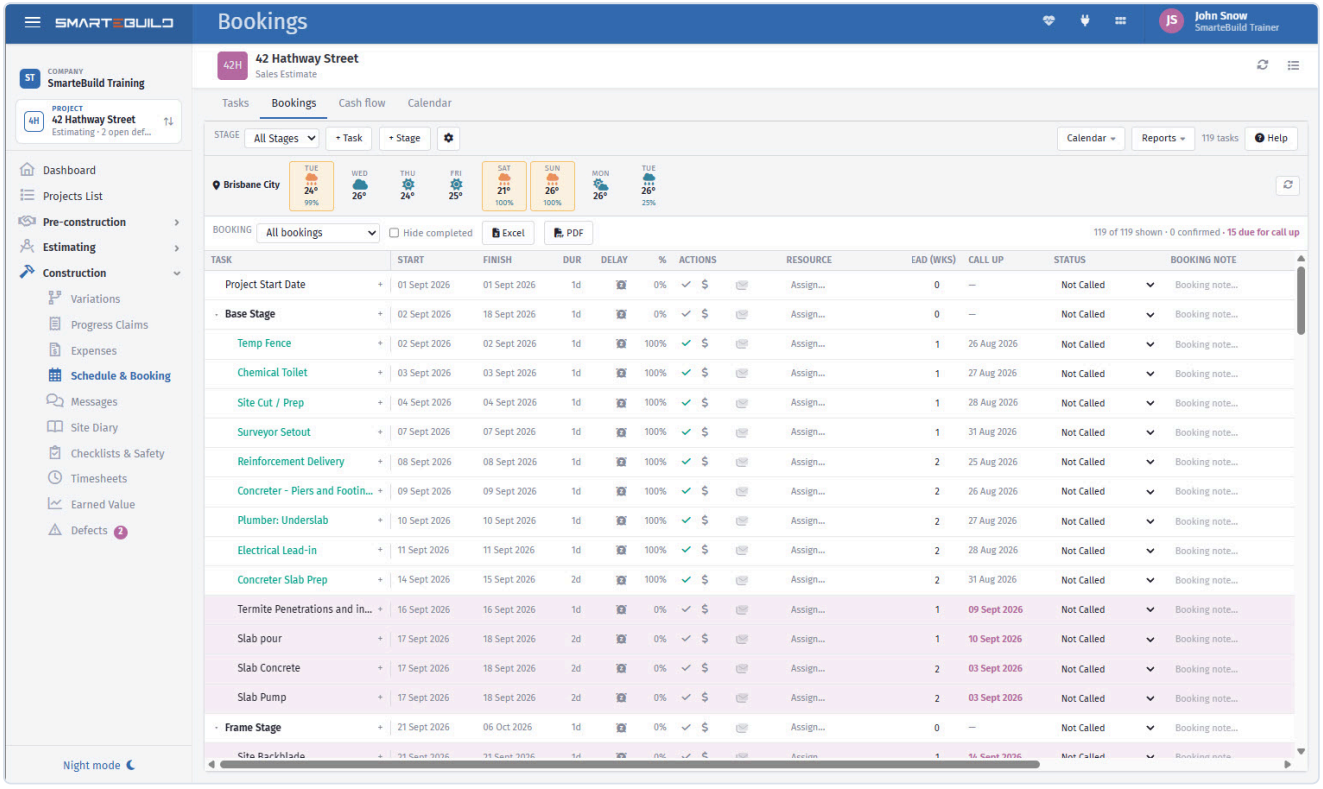
- **When you raise an order, link it** to its task.
- **When a variation is approved**, add the work to the schedule and link the new order.

Skip the second and the schedule drifts from the job as variations accumulate — which is exactly when you most need it to be right.

29.6 Call-up sheets BUILDER PLAN

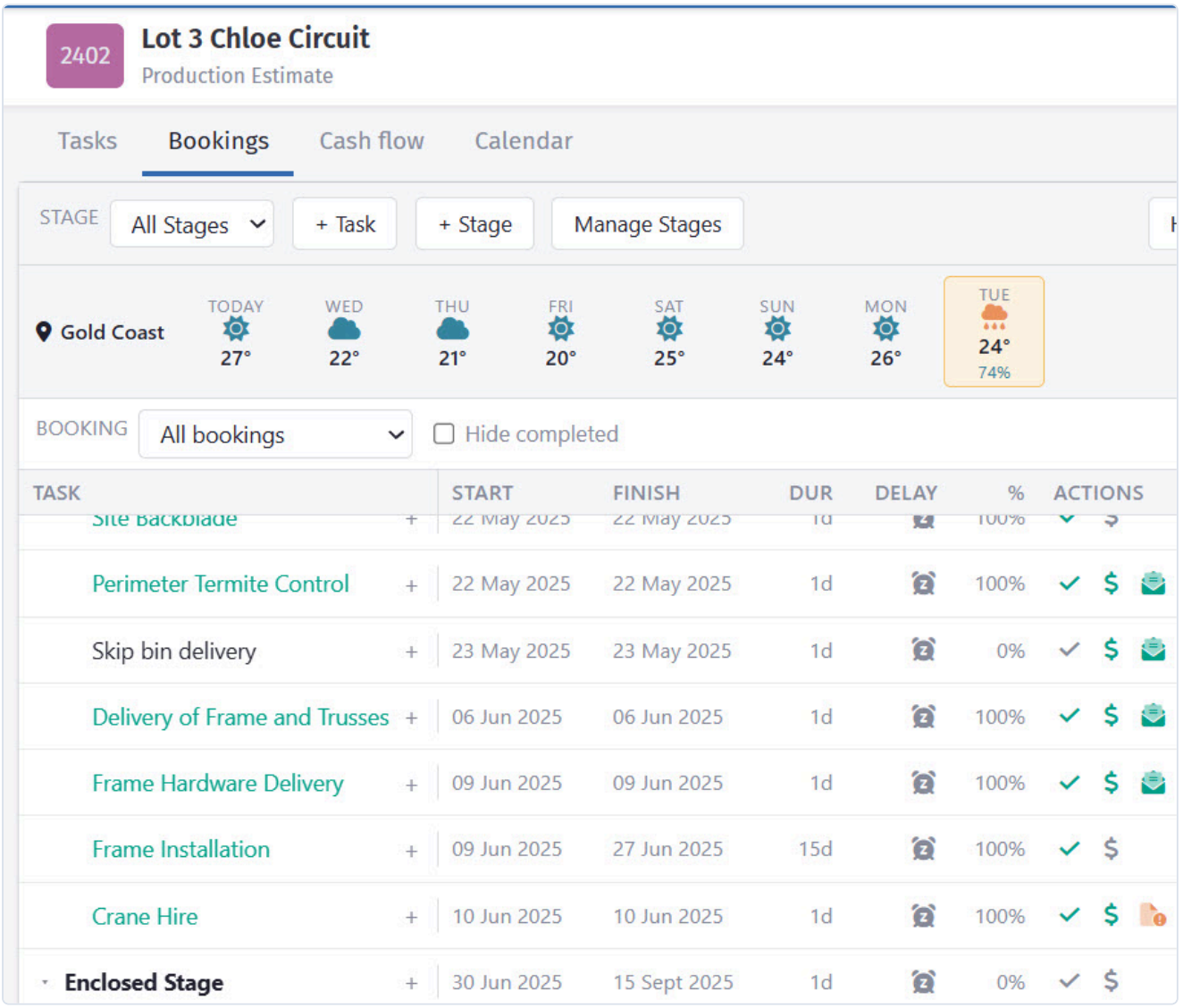
Telling subcontractors when to come, setting the notice period each trade needs, and running the weekly call-up.

A call-up sheet tells a subcontractor when they are needed. The **Call up** view generates them from the schedule, so the dates come from the programme rather than from somebody's memory.



Who is needed, when, and who has not been called yet.

Call up (weeks)



Each trade gets the notice it actually needs, not a single default.

Call up (weeks) on a task is how far ahead that trade needs telling.

Set it per task, because trades differ enormously:

Trade	Typical notice
Concrete	1 week
Carpenter	2 weeks
Plasterer	2 weeks
Roof tiler	2 weeks
Cabinetmaker	6 weeks — it is a manufacturing lead time
Windows	8 weeks — ordered, not called up
Crane	1 week, and confirm the day before

Ask each of your regular subcontractors what notice they want and set it once. It is the difference between a trade turning up and a trade being on someone else's job.

> **Long-lead items are orders, not call-ups** — Cabinets and windows need ordering months ahead, not calling up two weeks ahead. If a long-lead item is only in your schedule as a call-up, it is already late. Put the order date in the schedule as its own task.

Running the weekly call-up

The **Call up** view shows what is due to be called based on each task's notice period and its scheduled start.

A workable routine, same time each week:

1. Open the **Call up** view.
2. Work down what is due.
3. Send each call-up.
4. Note the ones that need confirming — see Bookings.
5. Chase last week's unconfirmed ones.

Twenty minutes on a Monday morning, across every job.

What a call-up should say

CALL-UP SHEET

Hathway Constructions Pty Ltd
Carpentry, bricklaying and formwork · (07) 5550 0199

TO
Pro Fix QLD Pty Ltd — Carpentry

JOB
42 Hathway Street

ATTENTION
Shane Roper

CALLED BY
John Snow, 1 Oct 2026

SITE ADDRESS
42 Hathway Street, Mount Gravatt East

THE WORK
Carpenter — First Fixing
Hang internal doors, fix architraves and skirting throughout.

START ON SITE
Mon 12 Oct 2026
confirm by Thu 8 Oct

ALLOWED
4 days
finish Thu 15 Oct

SITE CONTACT
John Snow
0491 570 156

BEFORE YOU START

- Doors and hardware are on site — stacked in the garage, marked by room.
- Site induction with the supervisor on arrival. Hard hat, boots and hi-vis.
- Parking on the verge only; the driveway is poured and still curing.
- Rubbish to the bin on the street side — do not leave offcuts in the house.

Please confirm this booking
Reply to this email, or use the Confirm link in it — the schedule updates for everyone.

Generated by SmarteBuild from the job schedule. Dates move with the programme.

Enough detail to turn up with the right people and the right gear.

A call-up sheet needs four things, and the sheet carries them from the task:

- **What** the work is — the task name, which is why naming tasks properly matters
- **When** — the date, and how long you have allowed
- **Where** — the site address, from the project
- **Anything they need to know** — access, materials, who else is on site

`Concrete, Tuesday` is not a call-up. `Slab pour, 18.6 m³ N32, Tuesday 14 Oct from 7am, 18 Beach Road Torquay, pump booked, access via rear lane` is one.

Confirm, do not just send

A call-up that has been sent is not a trade that is coming. Confirmations are tracked in Bookings, and the gap between sent and confirmed is where lost days live.

When the schedule moves

If a task moves after its call-up has gone out, tell the trade — and say what changed rather than just sending a new date.

A subcontractor who receives a second sheet with a different date and no explanation often assumes the first was wrong, or ignores it. One who is told *"the frame inspection slipped, so you are now Thursday not Tuesday"* re-plans around you.

Re-send all moved on Bookings emails the new dates to every trade the schedule has moved, in one go — see Re-send all moved. Ring the ones where the reason matters.

Call-ups and orders

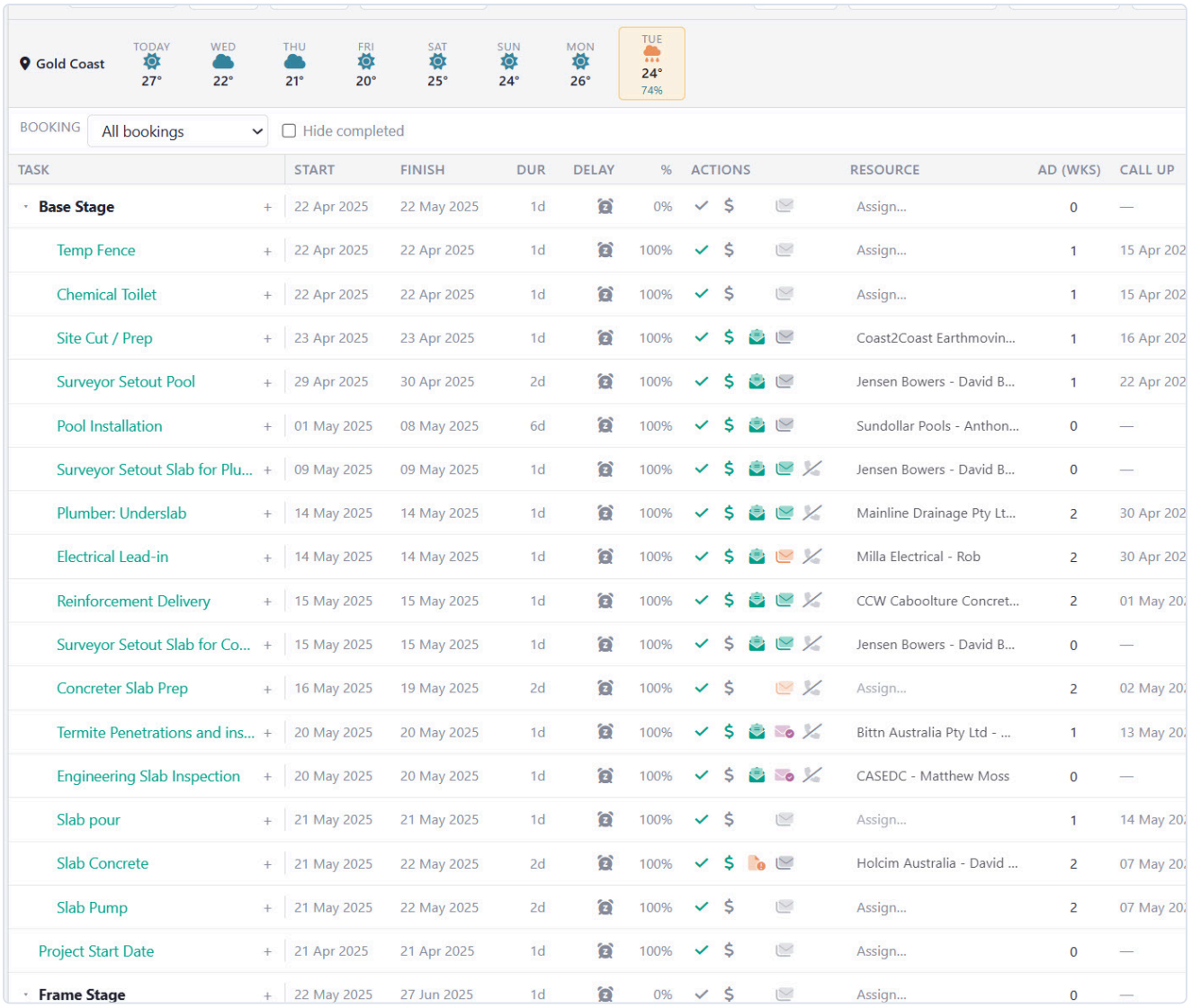
A call-up is not an order. The order commits the money and the scope; the call-up says when to come.

Both usually go to the same subcontractor for the same work, and both are needed. A trade with an order but no call-up does not know when; a trade with a call-up but no order has no agreed price.

29.7 Bookings and confirmations BUILDER PLAN

Tracking which subcontractors have confirmed, chasing the ones who have not, and why sent is not the same as booked.

Bookings tracks who has confirmed they are coming. It is the difference between having sent a call-up and having a trade on site.



Who has confirmed, who has declined, and who has said nothing.

Sent is not confirmed

A call-up that has gone out is a request. A booking is an agreement.

Most lost days on a building site are not caused by a subcontractor letting you down. They are caused by nobody noticing that a subcontractor never replied — and the two look identical right up until the morning nobody arrives.

> **The unconfirmed list is the one that costs money** — A trade that declined tells you something and you re-plan. A trade that never responded tells you nothing, and you find out on the day. Chase silence harder than you chase refusals.

Subcontractors answer from the email

Every call-up email carries a link. The subcontractor opens a page showing the task, the dates and the site, and answers with one click — **Confirm Dates** or **Decline task** — or offers a day that suits them with **Suggest another date** (see below). They do not need a login.

The same page lists their other bookings with you, from last week on — dates, job, task and where each is up to — with a link to answer each one. A trade on three of your jobs can sort out all three in one sitting.

Their answer lands on the task's call-up status straight away:

Status	What it means
Not Called	Nothing has gone out yet
Emailed	The call-up has gone; no answer yet
Called	You rang them
Confirmed by phone	They said yes when you rang — you set this one
Supplier Confirmed	They said yes from the email link
Declined	They said no from the email link

The link only answers once. After they confirm or decline, opening it again just shows the answer they gave. If you cancel the booking after the email went out, the link tells them it has been cancelled and to contact the site supervisor.

When a subcontractor declines

A decline from the email link tells people straight away:

- **The bell.** *Call-up declined by subcontractor* appears on the bell at the top of the page for the estimate's site supervisor and for everyone with edit rights on the estimate. Click it to open Bookings for that job.
- **An email to the site supervisor**, with the task, the job, the booked dates and the subcontractor's contact details. Press reply and it goes to the subcontractor.

A confirmation from the link puts *Call-up confirmed by subcontractor* on the same people's bell. There is no email for a confirmation, because nothing needs doing.

The subcontractor is only told the builder has been notified when one of these really went out. If nobody could be told, the page asks them to ring the site supervisor instead.

> **When nobody gets an email** — The email needs a **site supervisor** set on the estimate, and that person needs an email address. Without one, only the bell goes. A call-up sent from the older **Call up** sheet, rather than from Bookings, tells nobody when it is answered; the subcontractor is asked to ring instead. Either way, keep looking at the list: a decline nobody reads costs you the same lost day as a subcontractor who never answered.

When they suggest another date

Suggest another date lets the trade pick a day, from today on, and add a **Note to the builder** (they can add a note to a plain decline too). It is recorded as a decline, with their date and note attached. The bell goes as for any decline, and the site supervisor's email is titled *New date suggested: ….*

On Bookings, that task shows an **orange button with their date** — *08 Oct 2026?*. Hover it to read the note. Click it and the task moves to start that day, the tasks linked after it move with it, and the new booking is emailed to the trade — all in one go. A note with no date shows as a speech-bubble icon instead.

Before you click, check what else moves: if the task is on the critical path, the finish date moves with it.

Running it

1. Send the call-ups.
2. Answers that come back through the email link record themselves. Record the ones you get by phone as **Confirmed by phone**.
3. Look at what is still unconfirmed.
4. Chase anything unconfirmed within its notice period.
5. Escalate anything unconfirmed inside a week.

Step four is the whole value. A carpenter who has not confirmed with ten days to go is a mild concern; with two days to go it is a problem you probably cannot solve.

On a tablet: List and Table

Above the list, **List** and **Table** switch between two ways of showing the same bookings.

- **List** shows one card per task, made for an iPad or other tablet. Each card has the task and its planned dates, the trade, and where the booking stands (the status, then the booked dates or the **Call up by** date). Tap the card to open the booking panel. The envelope on the right emails the booking; it reads **Rebook** when the schedule has moved since the trade was told. The tick on the left marks the work done. A group heading folds its tasks away when you tap it.
- **Table** shows every column, and suits a computer screen.

The page chooses List on a tablet and Table on a computer. Once you choose one yourself, it remembers your choice on that device. The filters, the order, **Excel** and **PDF** work the same in both.

On a tablet held upright the booking panel opens over the list. Tap the dimmed list, or the cross, to close it.

A tablet held upright, or a phone, also shows less at the top of the page so the list gets the room: **+ Task**, **+ Stage**, **Calendar**, **Reports** and **Help** in the top toolbar, the **Excel** and **PDF** buttons and the counts on the right are hidden. The **Stage** filter stays. Turn the tablet on its side, or use a computer, to get them back.

The booking panel

Click a task's name (or tap its card) and a panel opens on the right with everything about that one booking. It is for booking, not for editing the task: there is nothing here about durations or links.

- **Who is doing it**: search for the trade and pick them. A task connected to a purchase order shows the order's contact instead, with **Open the purchase order**. **Lead time** is how many weeks ahead to ring them, and **Call up by** is worked out from it.
- **Actual dates**: the dates the trade is booked for, and later the dates the work really started and finished. Under each date, **Planned** copies the schedule's date and **Today** puts in today. **Use the planned dates** fills both at once. Setting a start with no finish books the planned length from that start.
- **Where it stands**: the **Status** and the **Booking note** (who you spoke to and what was agreed).
- **Progress**: the percent complete, and **Mark as done**.

The button at the bottom emails the booking. It reads **Rebook by email** when the actual dates no longer match the schedule, and the panel says what the trade was told against what the schedule says now. **Cancel**

booking appears once an email has gone out. If the trade suggested another date, the panel shows it with their note and **Use this date and re-book**.

To change the task itself (its length, links or stage), use the link at the foot of the panel. It opens the same task on the Tasks tab.

Taking the list off the screen

Two buttons above the list, **Excel** and **PDF**, hand you the bookings to send on or pin up.

Both give you the list **exactly as it is on screen** — the same filters, the same order, the same columns. Filter to *Due for call up*, hit either button, and that is what you get, not the whole job. The filter you used is printed on the sheet and written into the spreadsheet, so nobody reading it later mistakes a stage for the whole project.

Excel downloads a file that Excel opens straight away. Headings are on the first row, so you can sort and filter it like any other spreadsheet — by call-up date, for instance, to build a ring-around list. The job name, the filter and the date sit underneath the last row.

PDF opens your browser's print window. Choose your printer to print it, or choose **Save as PDF** (Windows, Mac and every modern browser offer this) to get a file you can email. It prints landscape, repeats the headings on every page, and marks the rows needing attention in words as well as colour, so a black-and-white printer loses nothing.

The **Actions** column is left out of both — the buttons in it do nothing on paper.

The weather

A forecast strip sits across the top of the sheet: a week or so of day icons for the project's site — its **postcode** — with the wet days shaded yellow. Hover one for the detail.

The same icons appear next to individual dates in the grid — beside a **Start** date and beside a **Call Up** date — whenever that date falls inside the forecast. That is the one that earns its place: it puts the forecast next to the decision, so a pour booked into Thursday's rain is visible while you are still looking at the booking rather than after the concrete is ordered.

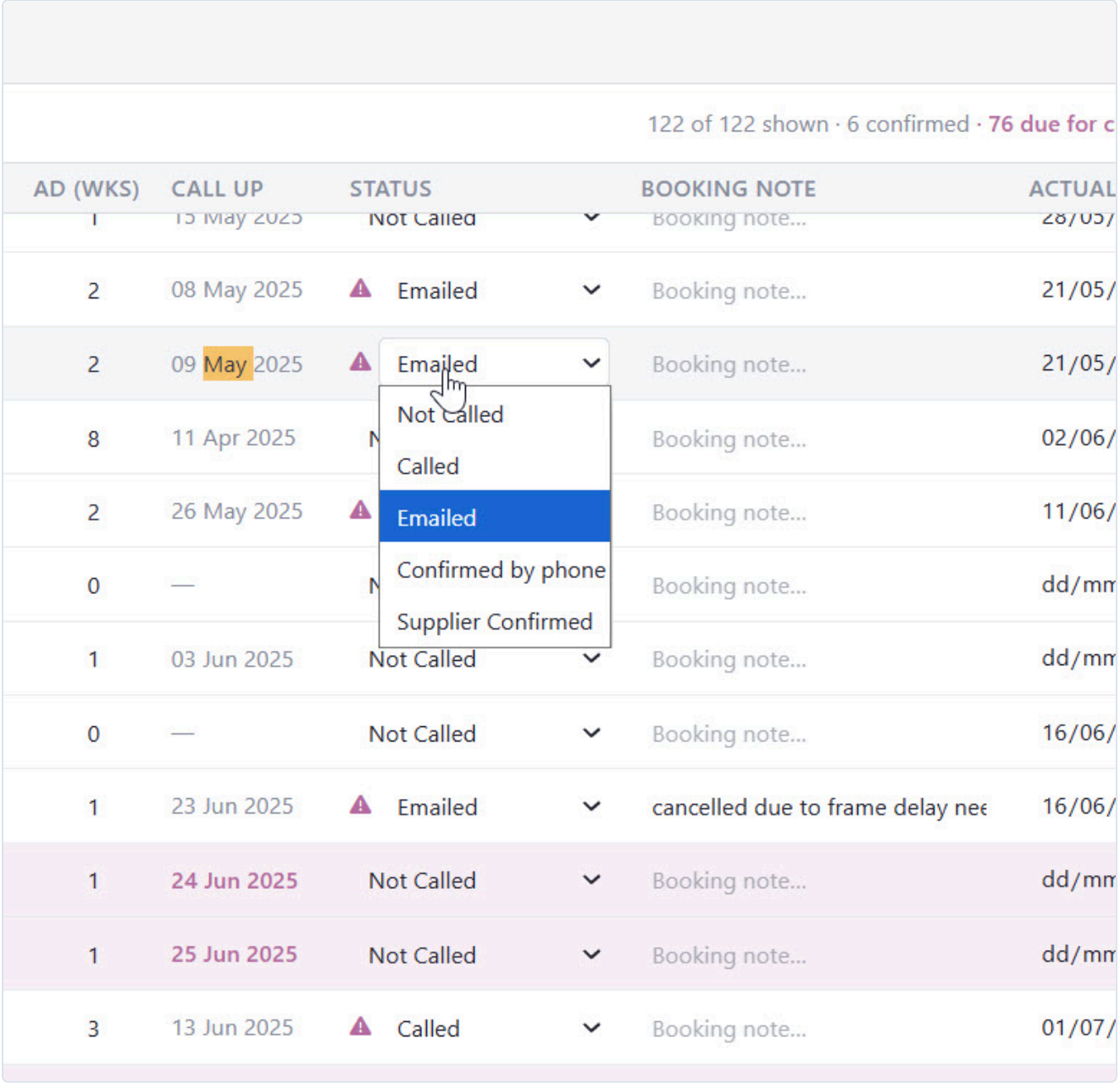
Dates further out have no icon, because there is no forecast for them yet.

The strip keeps itself current — a sheet left open checks again every few hours and when a new day starts — and the ↻ button at its right-hand end gets the latest forecast straight away.

Treat it as a prompt to ring someone, not as fact. It changes nothing on the schedule and moves no dates — a forecast four days out is a reason to have the conversation early, not a reason to move the booking on its own.

> **No icons at all?** — Either the project has no suburb or postcode yet (add them under Edit Project), or forecasts are not configured on your server. The strip says which.

Chasing



This is the list that costs money when nobody looks at it.

Ring, do not email. A subcontractor who has not answered an email will not answer a second one, and the call takes a minute.

On the phone

The job's **Bookings** tile in the mobile app shows the same picture — who is confirmed, who has not replied, and what is coming up. The tile says it plainly: *"Not yet confirmed"*, *"Confirmed"*, *"Nothing to chase"*.

That is the useful place to check it. Standing on site a week out, glancing at who has not answered, is when the gap is still cheap to close. See What you can do on site.

Recording the chase

Then record what was said. *"Confirmed by phone with Jim, 2 Oct"* is worth having when the truck does not arrive.

When someone cannot make it

Deal with it in the Schedule rather than the calendar, so everything depending on the task moves with it.

Then ask two questions:

Is this task on the critical path? If it has float, a few days may cost nothing. If it is critical, the finish date has just moved.

Can something else be brought forward? Work off the critical path can sometimes fill the gap, so the week is not lost even though the task is.

If the trade offered a day that works, the orange date button does the move and the re-booking in one click — see When they suggest another date.

Re-send all moved

When the schedule moves, bookings already sent go stale: the trade still has the old dates. **Re-send all moved (N)** emails the new dates to every trade whose booking the schedule has moved away from — N is how many.

It lists them and asks before anything goes, then sends one at a time. Declined bookings are left out: a trade who has said no needs a phone call, not another email.

Run it after any change that shifts a run of tasks — a wet week, a late inspection, an approved variation.

Confirming twice for the big ones

Some tasks are worth confirming again the day before:

- anything needing a **crane or a pump**
- anything where **several trades** have to coincide
- **concrete pours**, where a no-show wastes a whole crew
- the first day of any **new subcontractor** on the job

The morning of a pour is the wrong time to discover the pump is on another site.

Bookings and the calendar

The Calendar shows what is booked on which day, which is the fastest way to spot two trades booked into the same space at the same time — or a day with nobody on site at all.

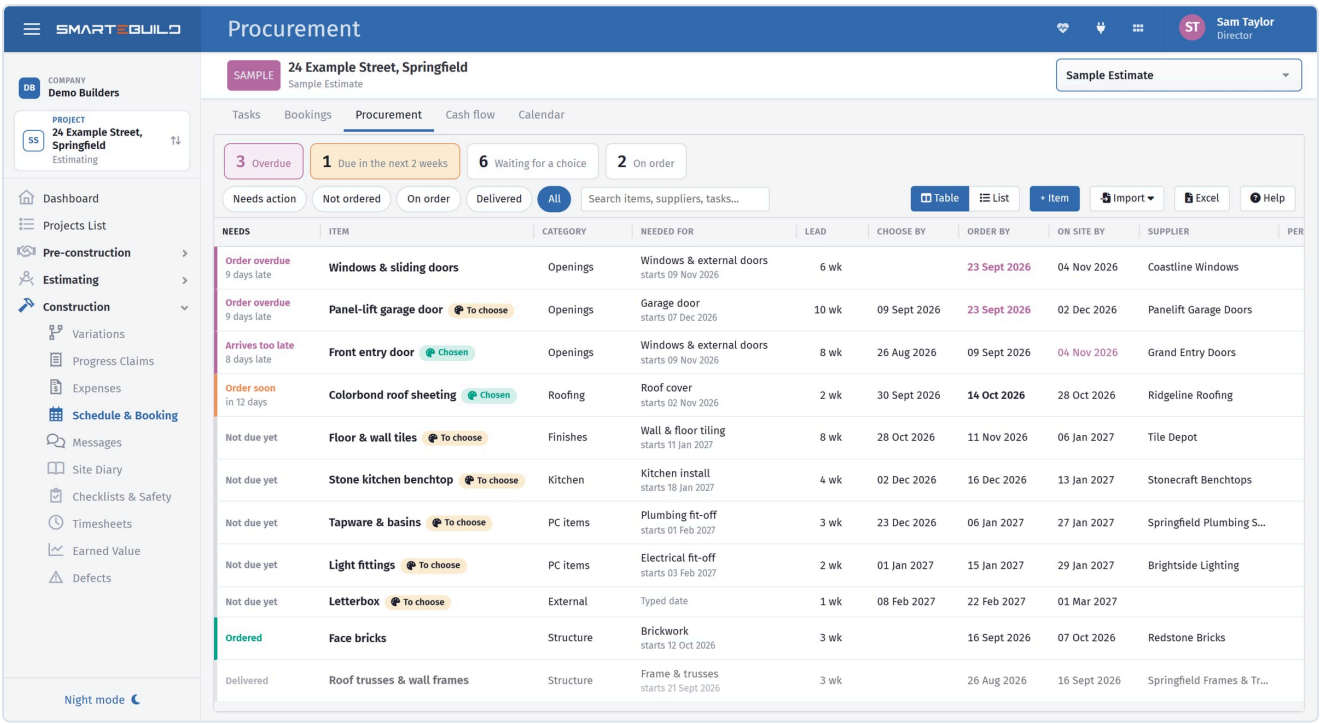
Both are worth catching a week out rather than on the day.

29.8 Procurement BUILDER PLAN

A list of everything to choose, order and deliver for a job, with order dates that follow the schedule.

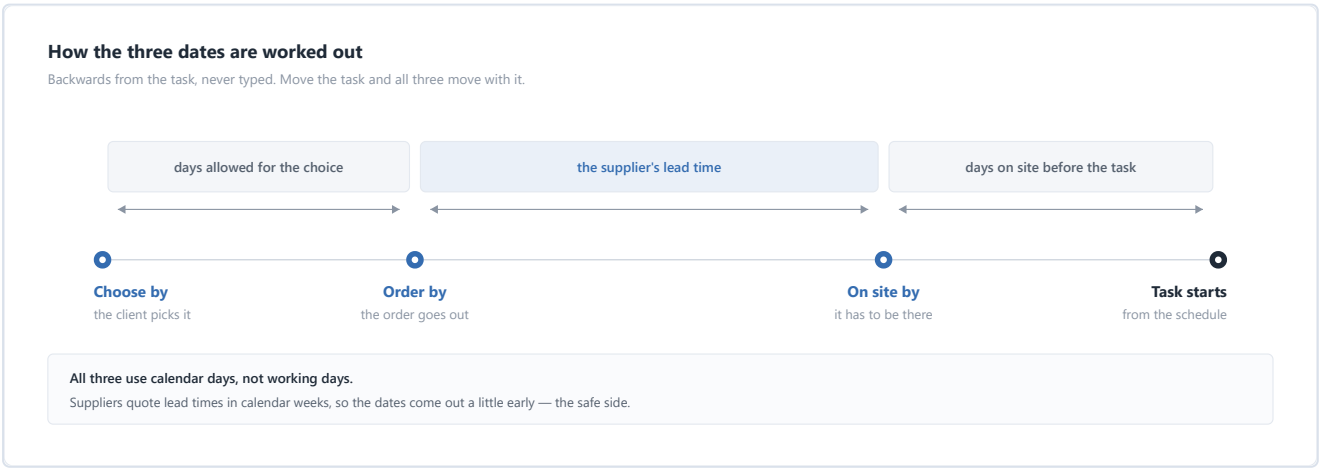
The **Procurement** tab, next to **Bookings**, is the list of everything that has to be chosen, ordered and delivered for the job: light fittings, tapware, appliances, steel, a letterbox. Each item is tied to the schedule task it is needed for. SmarteBuild works out when to order it from that task's date and the supplier's lead time.

Nobody types the order date. When the schedule moves, every order date behind it moves too, and the list re-sorts itself by what is now most urgent. That is the difference from keeping the list in a spreadsheet or another app: there, a date moved in the schedule has to be changed by hand in the list as well, and the one that gets missed is the one that holds up the job.



Most urgent first, with the tiles counting each kind of problem.

The three dates



Date	How it is worked out
On site by	The task's start, less the days you want the item there before it. The task's **booked** start is used once it is booked, the planned start until then.
Order by	**On site by**, less the lead time.
Choose by	**Order by**, less the days allowed for the choice. Only when someone has to choose it first.

All three use calendar days, not working days. Suppliers quote lead times in calendar weeks, and if anything the dates come out a little early, which is the safe side.

An item that is not tied to a task (a letterbox needed by handover, say) takes a date you type instead. A typed date does not move with the schedule, so tie the item to a task whenever there is one.

What needs you

The list opens on **Needs action**, most urgent first.

Four tiles across the top count the job at a glance — **Overdue**, **Due in the next 2 weeks**, **Waiting for a choice** and **On order**. A fifth, **No date yet**, appears only when something has no date to work from. Click a tile to narrow the list to it.

NEEDS	ITEM	NEEDED FOR	ORDER BY	ON SITE BY
Order overdue 9 days late	**Windows & sliding doors**	Windows & external doors starts 09 Nov 2026	**23 Sept 2026**	04 Nov 2026
Order overdue 9 days late	**Panel-lift garage door** To choose	Garage door starts 07 Dec 2026	**23 Sept 2026**	02 Dec 2026
Arrives too late 8 days late	**Front entry door** Chosen	Windows & external doors starts 09 Nov 2026	09 Sept 2026	04 Nov 2026
Order soon in 12 days	**Colorbond roof sheeting** Chosen	Roof cover starts 02 Nov 2026	**14 Oct 2026**	28 Oct 2026
Not due yet	**Floor & wall tiles** To choose	Wall & floor tiling starts 11 Jan 2027	11 Nov 2026	06 Jan 2027
Not due yet	**Stone kitchen benchtop** To choose	Kitchen install starts 18 Jan 2027	16 Dec 2026	13 Jan 2027

The Needs column says what the item is waiting on, and the edge colour repeats it.

Each row then says what it needs of you, in the **Needs** column:

Shown as	Means
Order overdue	The order-by date has passed and it is not ordered.
Choice overdue	It still has not been chosen and the choose-by date has passed.
Arrives too late	It is ordered, but the supplier's delivery date is after the date it is needed on site.
Order soon, **Choose soon**	Due in the next two weeks.
No date	Not tied to a task and no date typed, or the task has no dates yet.
Not due yet	Nothing needed for a while.

Rows are edged pink when late, orange when due soon, and teal once ordered.

Table or List

Table and **List**, above the list on the right, show the same items two ways.

- **Table** has one row per item with every column: what needs doing, the item, category, quantity, task, lead time, the three dates, supplier, person, status and delivery date. Click a column heading to sort by it, and again to reverse. **Needs** puts it back in urgency order. **Category**, **Qty** and **Lead** can be changed right in the table: click the cell, type, and press Enter (or click away) to save; Escape leaves it as it was. In **Qty**, type a number and a unit if you like (`25 m2`); a number on its own keeps the unit already there. Click a **Status** to pick another from your list, as on a Monday.com board. Drag the right-hand edge of a heading to make that column wider or narrower; double-click the edge to put it back. Your widths are remembered on that device.
- **List** has one card per item, made for a tablet.

The page picks Table on a computer and List on a tablet until you choose one, then remembers your choice on that device.

Your own statuses

Out of the box an item is **Not ordered**, **Ordered**, **Delivered** or **Not needed**. If your team works with other words - **In Warehouse**, **On Site**, **Not Required** - an administrator can change the list: **Statuses**, above the list on the right.

- Give each status a **name**, a **colour** and a **stage**, and put them in the order you want them offered. **Start from: With a warehouse** fills in Not Ordered, Ordered, In Warehouse, On Site and Not Required in one go.
- The **stage** tells SmarteBuild what a status means, so the warnings keep working whatever you call it:

Stage	Means
Not ordered	Still to order. Only these can go **Order overdue**.
Ordered	On order. Only these can **Arrive too late**.
Received	Delivered, in a warehouse or on site - nothing left to chase.
Not needed	Left off the job, and out of **Needs action**.

- Every list needs at least one **Not ordered** status (new items start there) and one **Ordered** status (a linked purchase order turns an item to it when it is sent). The other two stages are optional, and a stage can have several statuses.
- The statuses are your **company's**: every job, and everyone, uses the same list.
- Removing a status that items still show moves those items to the first status of the same stage - they are never left without one. Moving a status to another stage moves its items too.
- Once nothing is left to do, the **Needs** column shows the status itself - **In Warehouse**, **On Site** - instead of a warning.

Adding items

+ Item opens a blank item. Everything else is under **Import**:

- **Add colour selections** - one item for every colour selection on the job that is not on the list yet. Each still needs the task it is for and a lead time.
- **Add from the estimate** - lists this job's estimate items, grouped by cost code, opening on the **PC items** (prime cost: the fittings the client usually chooses and you order) when the estimate has any; **Every item** shows the rest. Tick what has to be ordered and each becomes an item named after the estimate item, filed under its cost code, with the supplier of its chosen product. Items already on the list are marked and cannot be added twice.
- **Copy from another job** - reuse a list you made for another job (a house type you build again, say). Only jobs that already have a procurement list are offered, most recently worked on first. Pick the job, tick the items, copy. Each item brings its category, lead time, margins, whether a choice is needed, supplier, person and note, and starts as **Not ordered**. It is tied to the task **with the same name** on this job's schedule when there is one - before you copy, the window says how many will be. The purchase order, colour selection and dates belong to the other job and are not copied.
- **Import from Excel or Monday.com** - reads an Excel file (.xlsx) or a CSV. A board from Monday.com works as it is: on the board, choose **Export board to Excel** and pick that file. The columns are matched by their headings (Category, Quantity, Unit, Supplier, Status, Due date on site, Lead time, Person, Delivery date, Notes). A board grouped by status, with no Status column, works too: each item takes the status of the group it sits under.
- **Paste a list** - copy the rows in Excel and paste them, or type one item per line. With a heading row the columns are matched as for a file; without one, each line becomes an item and a second column its category.

For a file or a pasted list you see every row before anything is saved, and a supplier or person that does not match anyone on the job is kept in the item's note, so nothing is lost. A status that matches one of yours by name is used as it is; any other status name (`PO Sent`, `Working On It`) is listed above the rows with a guess beside it - pick the status each should become before you import. Tie the items to tasks afterwards.

One item

Click an item to open it on the right. Across the top are its dates (**Choose by** when there is a choice to make, **Order by**, **On site by**), worked out as you type, before you save. Below them, four tabs. A dot on a tab means something on it needs attention - orange for soon, pink for late. Each tab only shows what applies, so a choice the item does not need, or details a purchase order already supplies, do not appear.

Item - the name, the category, the **quantity** and its **unit** (each, m2, lm), who is looking after it, and a note.

Timing - what decides when it is needed:

- **A schedule task** - search the schedule (tasks are listed in date order), then how many days before the task starts it should be on site (5 to start with).
- **A fixed date** - the date it is needed on site. It does not move with the schedule, so use a task whenever there is one.

Then the **lead time**, in weeks from order to delivery (halves are fine). With a task picked you can switch on **Use the task's lead time (the one on Bookings)**: the item then uses the task's own lead time, and it is one number for both - change it here (or in the table) and the task's lead time on Bookings changes too, change it on Bookings and the item follows. Shared lead times are in whole weeks, as on Bookings. In the table a shared lead time has a small link sign next to it. Underneath, a short timeline shows how each date is worked out from the next.

Choice - switch on **Someone has to choose it before it can be ordered** for items the client or you still have to pick. Link the **colour selection** it depends on and the choice counts as made as soon as it is approved on the Colour Selection page - a card shows where it stands. Without a link, tick **The choice has been made** yourself. **Time to choose** sets how many days before the order date the choice is due.

Order - a reminder at the top when the order is due or late, then:

- **Purchase order** - type part of the order number, name or supplier to find it, and the order fills in the rest: the supplier, whether it is ordered (**Not ordered** until it is sent from the Orders page, then **Ordered**) and the day it was sent. Those are no longer asked for. Your **Received** and **Not needed** statuses (In Warehouse, On Site, Not Required...) are still yours to pick; click the one that is on again to hand the status back to the order.
- **No purchase order** - pick the **supplier** and the **status** yourself, from your list.
- **Delivery due** - once it is ordered, the supplier's date. The list warns you if it is later than the date the item is needed on site.

What the client sees

When an item is linked to a colour selection and still waiting for the choice (not ordered yet), the client's selections page shows **Please choose by** with the item's choose-by date - the same date as here, moving when the schedule moves. Once that date has passed it asks them to choose as soon as they can. Each category heading shows its soonest date too, so a closed category still says when it is due. Nothing else from the procurement list is shown to the client.

On your Dashboard

Whoever is **Who is looking after it** on an item sees it in **My procurement** on their Dashboard when it has to be chosen or ordered this week or next (or is already overdue), across every job. The Purchase Orders list also shows how many items on the job are overdue or due soon, with a link here.

The weekly email

Everyone who looks after at least one item also gets **one email a week**, early on Monday morning, with the same list as **My procurement**: what to choose or order by the end of next week across every job,

grouped **Overdue**, **This week** and **Next week**. Each item in it opens straight on its job's Procurement tab.

- Nothing due that week means no email - you only hear from it when there is something to do.
- It comes from SmarteBuild's own address, never from your company's mailbox.
- It is on for everyone. To stop it, switch off **Weekly procurement email** under **Preferences** on your profile. Switch it back on any time and it starts again the next Monday.
- If the server misses a Monday, the email goes on Tuesday instead - never twice in one week.

Who can do what

Anyone who can open the job can see the list. Adding, changing and removing items needs the **Edit tasks** schedule permission. Purchase orders are only offered to people who can see orders. Changing the company's status list is for administrators only.

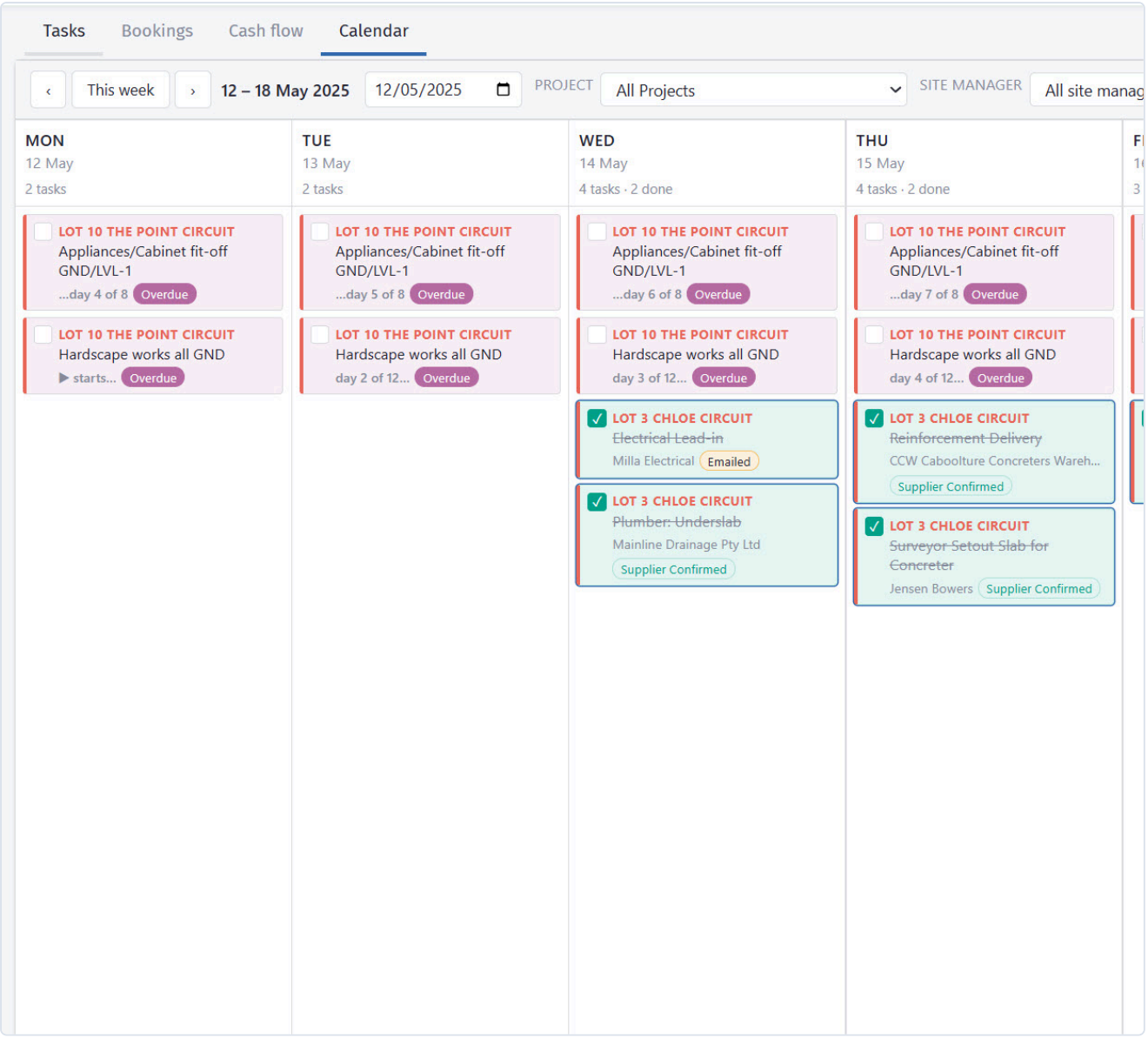
Taking it off the screen

Excel downloads the list as it is shown (same filter, same search, same order), with the three dates worked out.

29.9 Calendar and delays BUILDER PLAN

The weekly view across every job - by day or by job - with warnings for unconfirmed bookings, trade clashes and wet days, a phone layout, ticking work off, and recording delays.

The **Calendar** shows a week at a time, and every task running in it. Unlike the other Schedule views it is not limited to the job you have open: by default it shows **every job you have access to**, side by side — and it tells you what needs doing before you have to go looking.



What is booked on which day, and where the clashes are.

What it is for

Answering "what is happening this week?" — across the whole business, not one job at a time. It is the view to have open on a Monday morning and the one to look at before promising anyone anything.

What it catches for you:

- **A trade due in the next few days who has not confirmed** — or has said no
- **The same trade booked on two jobs on the same day**
- **Work booked on a day rain is forecast** at that site
- **Work that should have finished and has not**, flagged in pink

And what you will see at a glance: two trades booked into the same space, or a day with nobody on site — usually a gap nobody planned.

Two layouts

Switch between them with **Days** and **Jobs** at the top. The one you pick is remembered.

Layout	How it reads	Best for
Days	A column for each day, with every job's work in it	"What is on site on Tuesday?"
Jobs	A row for each job, a column for each day	"What is happening on Bleasby this week?" — and running several jobs at once

In **Jobs**, each row also shows that site's weather for the next week, right above the work it affects, along with the job's site manager and suburb.

Needs attention

The line under the toolbar counts what needs doing, and only appears when there is something to say:

Warning	What it means
Bookings to confirm	A trade due to start in the next three working days has not said yes. *Called* and *Emailed* do not count — those are what you did, not what they agreed to. A booking the trade has **declined** is here too, in pink.
Trade clashes	The same supplier is booked on two different jobs on the same day. It says "check", not "wrong" — a bigger trade may run two crews.
Tasks on wet days	Work is booked on a day the site's forecast says a 50% chance of rain or 5 mm. The schedule does not record which tasks are outdoor work, so a pour and a paint job are flagged alike — the judgement is yours.

Click a count to see the list, and click a line to open that task. The same warning also shows on the task itself, naming the day — **Confirm Fri**, **Clash Fri**, **Rain Fri, Sat** — so you know which day of a longer job it is about.

> **What the warnings can see** — They cover the days on screen, so use **This week** to see what needs doing now — on a Friday the check still looks ahead into Monday and Tuesday. A clash can only be spotted between jobs that are on screen, so choose **All Projects** to catch them.

Weather

The forecast is the same one shown on the job's **Tasks** and **Bookings** pages: seven or eight days ahead, for the site's postcode. A wet day is shaded yellow.

- In **Jobs**, every row has its own site's weather.
- In **Days**, the forecast sits in the day headings when one project is selected. With jobs in different suburbs there is no single "Tuesday's weather", so the headings leave it off and each task carries its own **Rain** warning instead.
- A job with no weather has no suburb and postcode set — add them under **Edit Project**.

Moving around

- ‹ and › step back and forward a week.

- **This week** jumps back to today. Today's column is marked and highlighted.
- The **date box** jumps to whatever week contains the date you pick.

Weeks run Monday to Sunday. Weekends and company shutdown days are shaded, and a shutdown shows its name in the column heading.

On a phone

On a phone the calendar shows **one day at a time** — seven columns do not fit a phone screen. Use ‹ and › to move a day at a time, and **Back to today** to return. The day's work is grouped by job, and each job's heading shows that site's weather for the day. The same warnings and ticks work as on a computer, with larger tick boxes for fingers.

Filtering

Two filters, both remembered between visits. By default neither is applied — the calendar opens showing **everything you have access to**.

Filter	What it does
Project	**Selected Project** (whichever is chosen in the left-hand menu) or **All Projects**
Site manager	Everything one person is running, across every project

Project is a two-way switch, not a second project list — which project "Selected Project" means comes from the project menu on the left, the same one every other page uses. With no project selected there, it stays on All Projects.

Site manager is the one worth knowing about. It is set per job, in **Project Details** → **Supervisor**, and filtering by it gives a supervisor their own week across every job they are running rather than one job at a time. The number beside each name is how many jobs they are on.

There is deliberately no filter for job status, completion or archived jobs. The calendar shows every job you can see, whatever stage it is at — a job at Sales Estimate is still work in the diary, and completed tasks are the point of ticking them off, not something to hide.

> **An empty week tells you why** — If a week comes back empty while a filter is narrowing it, the calendar names the filter and offers a **Show everything** button. An empty week with no such message genuinely has nothing scheduled.

Reading a task

Each task is **one bar across the days it runs** — a three-day job is one bar three days long, not three separate cards. A ‹ or › at the end of a bar means it carries on before or after this week. On a phone, where there is no bar across the week, the task says where the day falls instead — *Starts*, *Day 3 of 8*, *Finishes*.

The coloured edge on the left is the project. The same job is the same colour every week, so you can pick one job out of a busy screen at a glance.

Bars also carry the supplier, the call-up status (*Emailed*, *Supplier Confirmed*), progress if it has started, any warnings, and an **Overdue** flag if it should have finished and has not. A diamond ◆ means a milestone.

Click a task for the full detail — job number, site manager, booked versus planned dates, duration, supplier, call-up status, and any warnings spelled out in full. It links straight to that job's schedule, or to its **Bookings** page when a trade still needs confirming.

Ticking work off

The box on the left of each task marks it complete. Completed tasks turn teal, get a tick and are struck through, the day's count updates, and any warnings on the task clear.

This is the one thing the calendar changes. It sets the task to 100% and records today as the finish date if none was recorded — nothing else moves, and no other task's dates change. Ticked the wrong one? **Undo** on that job's Schedule takes it back — see Undo.

> **Walk the site with the calendar open** — Ticking work off as you see it is a thirty-second job that keeps the whole schedule honest. The alternative is reconstructing a fortnight of progress from memory.

Printing

Print produces the week as a page — filters, chrome and toolbars stripped, seven columns landscape. Useful for the site office wall or a subcontractor meeting.

What it is not for

Planning. Move a task in the calendar and nothing downstream follows, because the calendar shows dates rather than dependencies.

Plan in the Schedule, where a change flows through everything that depends on it. Use the calendar to read the result.

> **A job showing nothing** — A job only appears once its schedule has dates. If one looks missing, open its **Tasks** tab once — that computes the dates — then come back.

Delays

Delay Type records why a task was held up, and the delay carries how long it lasted and what it affected — *"affecting this task"*, *"and next"*, *"for the last"*.

Record delays as they happen, with the cause. Weather, access, a trade not turning up, waiting on an inspection, waiting on the client to decide.

> **Record delays the day they happen** — Nobody reconstructs a wet-weather record accurately in March for the previous October. Thirty seconds on the day is worth more than an afternoon at the end, and it is the difference between a claim you can support and one you cannot.

Extension of time notices

Each delay, in the delay window opened from the **Delay** column on the Schedule, has two dates of its own:

Date	What it is
Delay started	The day the hold-up began
Became aware	The day you learned of the cause. The notice period counts from here

Beside each delay is where its **extension of time (EOT) notice** is up to:

It says	Meaning
notice due 29 Sept	Nothing written yet; this is the deadline
Draft - notice due 29 Sept	Written but not given to the client
Orange	Two days or less to go
Notice overdue	The deadline has passed
Notice emailed 30 Sept / Notice given 30 Sept	Done, and when

EOT notice opens the notice writer. It shows the deadline: five business days (Monday to Friday, less company holidays) after **Became aware**, which is the period in the HIA residential contract. Check the period and the wording against your own contract — HIA, MBA or another — because that is what counts.

Fill in the client's name and email (the email comes from the project's default client), the **days claimed** (the delay's days to start with) and, if you like, the **contract clause**, such as 19.

The notice is drafted for you from the delay — cause, category, task, the two dates, days claimed and your note — plus **Conditions on site over those days**: the weather for each day, past days included, where your server has weather set up, and what the site diary recorded. Every word can be changed. **Fill in again** redrafts it from the record.

Then:

- **Save draft** — keep it and come back.
- **Print or PDF** — for a copy on paper or in the file.
- **Mark as given** — you handed it over or posted it; today's date is recorded.
- **Email to client** — sent from the company's orders mailbox, with you copied in, and replies come to you.

Once emailed or given, the notice is locked, so it stays the record of exactly what the client received.

> **Miss the window and the days can cost you** — Most contracts only grant an extension if you gave notice in time. Miss it and you can lose the extension — and the client can then charge **liquidated damages**, the daily penalty set in the contract, for every one of those days.

Why the delay record matters

Three reasons, in increasing order of money.

It explains the programme. A job four weeks late with eleven recorded wet days is a different conversation from a job four weeks late for no recorded reason.

It supports extensions of time. Most building contracts allow an extension for delays outside your control — weather, client decisions, latent conditions. Almost all of them require you to notify within a set period. A contemporaneous record is what makes the claim work, and the notice writer turns it into the notice and tells you when it is due.

It supports variation claims. A delay caused by a client's late decision or a design change is often a compensable delay, and the record is the evidence.

Client-caused delays

The most valuable ones to record, and the ones most often left out because it feels awkward.

If a client takes three weeks to choose tiles and the tiler is standing by, that is a delay caused by the client. Record it at the time, and tell them at the time — politely, as information rather than a complaint.

A client who is told *"we are holding the tiler, and each week costs us programme"* usually decides faster. One who is told nothing is genuinely surprised when the finish date has moved.

Telling them is also the formal step. Set **Became aware** to the day you knew they were holding things up, and send the extension of time notice before it falls due.

Working days

The schedule works in working days, so weekends and non-working days are not counted as duration. A five-day task starting Thursday finishes the following Wednesday — and in the calendar it appears on all five working days plus the weekend it spans.

Which days count is set per job, under **Calendar** on the Schedule's top toolbar. The same menu holds **This job's holidays** and **Company holidays**.

Working week & start date has two parts:

- **The days the site works.** Tick them — add Saturday for a job with a Saturday crew, say — or tick **Use the company's working week**.
- **The job start date.** Tasks with nothing before them start here. Left blank, they start today.

Save and recalculate moves every date to match. The chart then shades this job's non-working days and the company holidays, so what you see is what the schedule is counting.

Where you know about a shutdown well ahead — the Christmas break in particular — account for it rather than letting the schedule run through it. A residential job crossing the summer shutdown without allowance for it is optimistic by two or three weeks before anything has gone wrong.

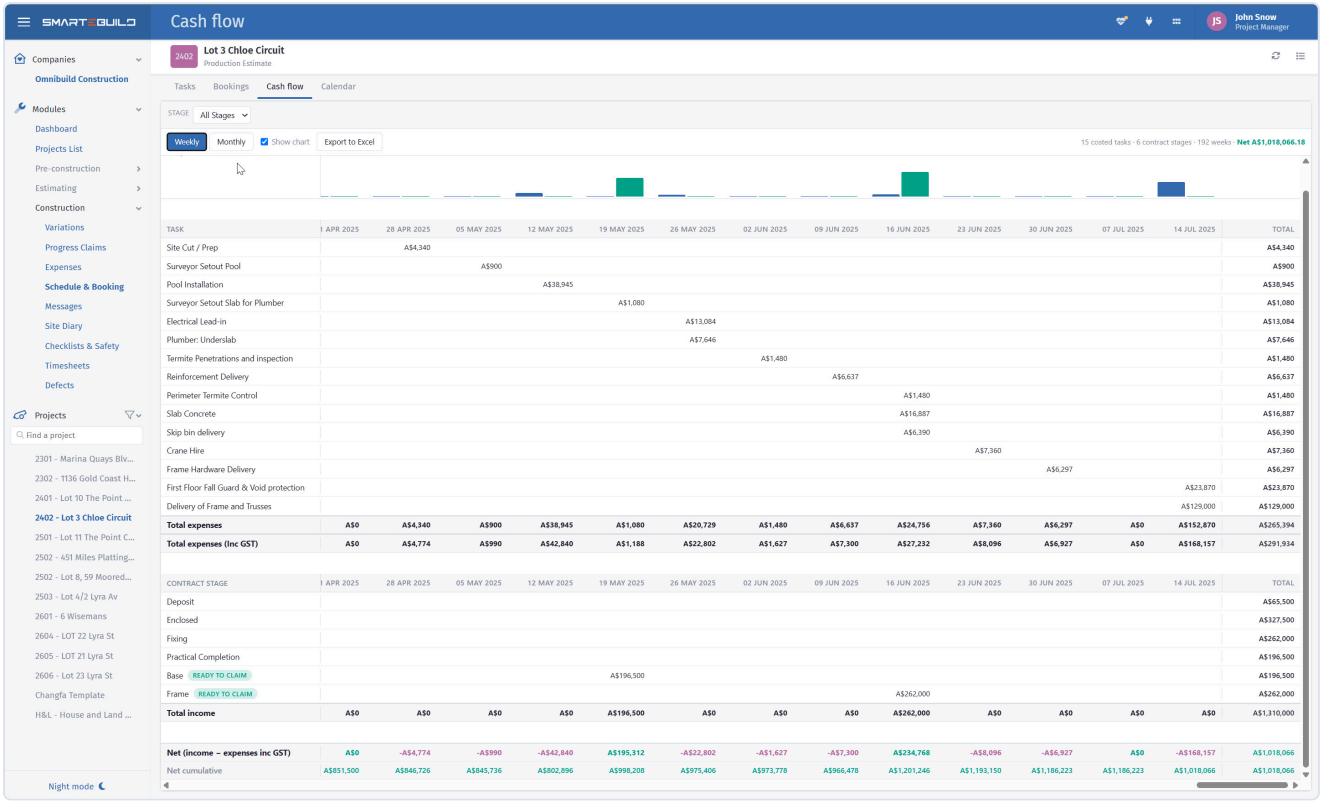
A weekly routine

1. Open the calendar on Monday, filtered to your site manager, in the **Jobs** layout.
2. Work through **Needs attention**: ring anyone not yet confirmed, sort out any clash.
3. Check the week: any empty days, anything pink, anything outdoor on a wet day.
4. Confirm the big ones — pours, cranes, coinciding trades.
5. Tick off what finished last week; record last week's delays, with causes.
6. Move anything that slipped in the **Schedule**, not here.

29.10 Cash flow BUILDER PLAN

Seeing what the job costs over time, what the view currently includes, and how to read it alongside your claim dates.

The **Cash flow** view spreads the job across the programme, so you can see what money is needed when — and when it comes back in — rather than only what the job costs in total.



Money in against money out, across the life of the job.

Three sections

Section	Shows
Expenses	What the job costs, over time
Income	What you expect to claim, from the contract stages
Net Cash Position	The two combined — the line that matters

All three sit on the same period columns, so a month's outgoings line up with that month's income and the net figure underneath.

The net line is the one to read. Expenses alone tell you what the job costs; the net position tells you how much of your own money is in it at any point, which is the number that decides whether you can take on the next job.

Where the expense figures come from

Weekly | Monthly | Show chart | Export to Excel

TASK	1 APR 2025	28 APR 2025	05 MAY 2025	12 MAY 2025	19 MAY 2025	26 MAY 2025	02
Site Cut / Prep		A$4,340					
Surveyor Setout Pool			A$900				
Pool Installation				A$38,945			
Surveyor Setout Slab for Plumber					A$1,080		
Electrical Lead-in						A$13,084	
Plumber: Underslab						A$7,646	
Termite Penetrations and inspection							
Reinforcement Delivery							
Perimeter Termite Control							
Slab Concrete							
Skip bin delivery							
Crane Hire							
Frame Hardware Delivery							
First Floor Fall Guard & Void protection							
Delivery of Frame and Trusses							
Total expenses	**A$0**	**A$4,340**	**A$900**	**A$38,945**	**A$1,080**	**A$20,729**	
Total expenses (Inc GST)	**A$0**	**A$4,774**	**A$990**	**A$42,840**	**A$1,188**	**A$22,802**	

CONTRACT STAGE	1 APR 2025	28 APR 2025	05 MAY 2025	12 MAY 2025	19 MAY 2025	26 MAY 2025	02
Deposit							

Expenses come from the orders and invoices already on the job.

Input	From
When the cost happens	Task dates in the schedule
How much	The task's cost, or its linked order
When it is paid	**Payment Method** and **Payment Extra days**

The third is the one people skip, and it is what separates a cost curve from a cash curve. Work done in week 6 on 30-day terms is *paid* in week 10, and the gap is exactly what you have to fund.

Where the income figures come from

Total expenses (Inc GST)	**,774**	**A$67,820**	**A$44,256**	**A$175,084**	A$291,934
ONTRACT STAGE	2025	MAY 2025	JUN 2025	JUL 2025	TOTAL
Deposit					A$65,500
Enclosed					A$327,500
Fixing					A$262,000
Practical Completion					A$196,500
Base READY TO CLAIM		A$196,500			A$196,500
Frame READY TO CLAIM			A$262,000		A$262,000
Total income	**A$0**	**A$196,500**	**A$262,000**	**A$0**	A$1,310,000
Net (income – expenses inc GST)	**,774**	**A$128,680**	**A$217,744**	**-A$175,084**	A$1,018,066
Net cumulative	,726	A$975,406	A$1,193,150	A$1,018,066	A$1,018,066

Income comes from the contract stages and what you have claimed.

Income is built from the project's contract stages — each stage's value, on its expected date.

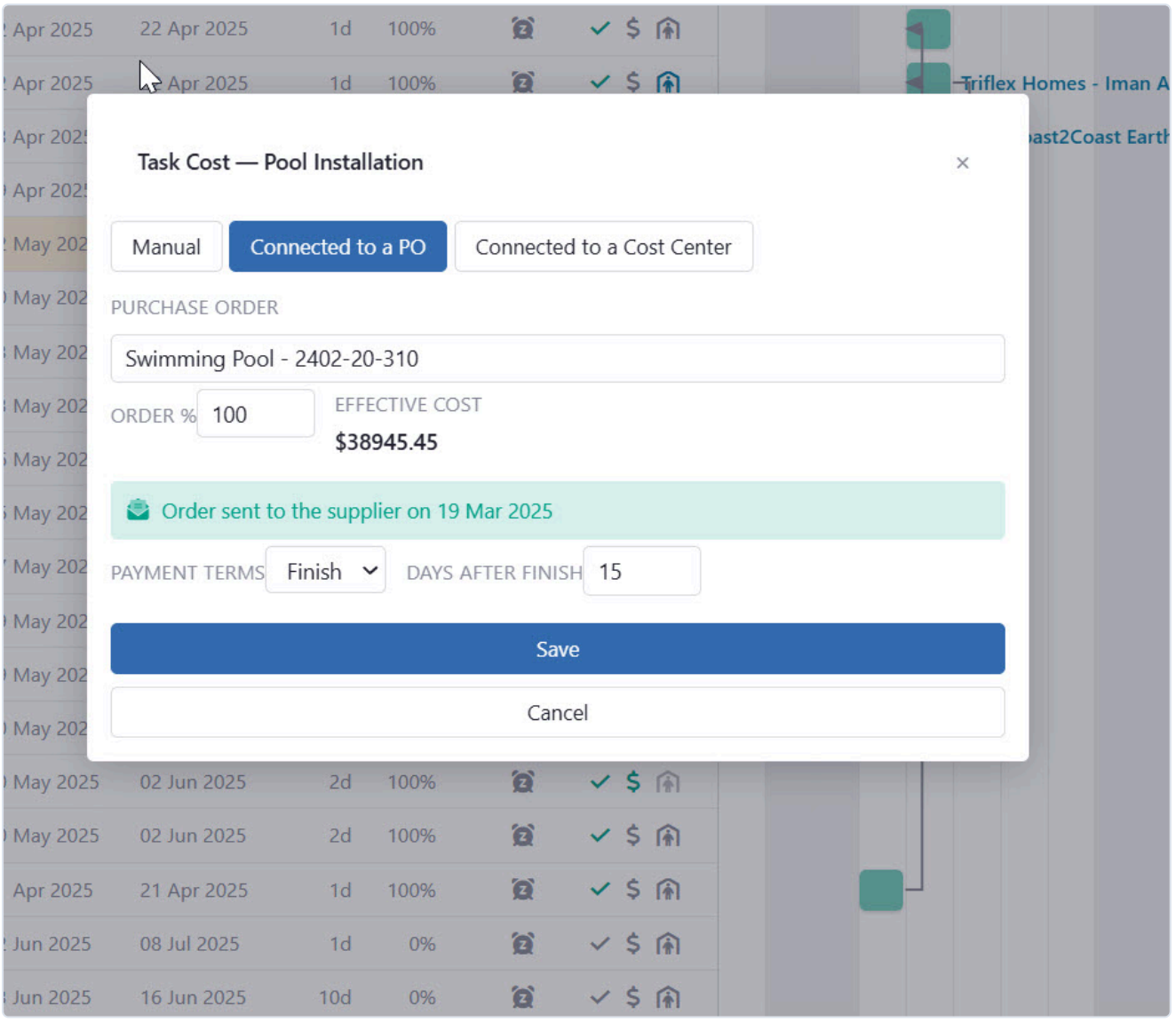
Two things sharpen it:

A stage linked to a schedule task takes its date from that task. Link the lock-up stage to the lock-up task and the income moves whenever the programme moves, instead of sitting on a date somebody typed in March.

A linked stage is only "ready" once its task is 100% complete. So the view can distinguish income you can actually claim now from income that is still ahead of the work. Stages with no linked task are always treated as ready, since there is nothing to wait on.

> **Cash flow does not raise claims** — It projects income; it does not create anything. Progress claims stay entirely manual — see Raising a claim. A stage showing as ready here is a prompt to go and raise the claim, not a sign that one exists.

Making it worth looking at



Terms are what move money from when it is owed to when it arrives.

The view is only as good as the tasks behind it. Three things:

Link orders to tasks. A task costed from its order carries a real committed figure. One with a typed estimate carries a guess. See Resources and cost.

Set payment terms. Without them, everything appears to be paid the day the work happens, which no builder has ever experienced.

Keep dates current. A schedule three weeks out of date produces a cash flow three weeks out of date, and it will look plausible.

Link contract stages to schedule tasks. This is what makes the income side honest. An unlinked stage sits on whatever date was typed when the contract was set up; a linked one moves with the programme, so when the frame slips a fortnight the frame claim slips with it and the net position updates itself. See Contract stages.

Reading it

The peak is the most cash the job needs at once. That is the number that decides whether you can take the job on, and it is rarely at the end.

The steep sections are where several expensive trades coincide. Worth knowing about in advance, and sometimes worth re-sequencing to smooth.

The net position is the real question, and the view works it out for you. A job that pays at lock-up but has its biggest outflow in the fortnight before is asking you to fund a gap — which is fine if you know, and a problem if you find out in the fortnight.

The S-Curve

The table shows what moves each month. **S-Curve** shows where the job is *up to* — both sides added up as the job runs, drawn as two lines:

- **Money out**, GST included, so it compares like with like against what you claim.
- **Money in**, from the contract stages.

It is called an S-curve because that is the shape spend makes on a job that starts slowly, runs hard through the middle, and tails off at the end.

The gap between the two lines is your money in the job. Where the money-out line sits above the money-in line, you are paying out ahead of being paid, and the vertical distance is how much of your own cash is in it at that point. A dotted **today** line shows where you are now.

It follows whatever the page is set to, so switching between **Weekly** and **Monthly**, or filtering to one stage, redraws it. Hover any point for that period's three figures, **Show the numbers** puts the same thing in a table, and **Export to Excel** downloads it.

Worked example

The Hendricks extension, month by month — this is the shape the three sections show:

Month	Outgoing	Claim due	Stage
Oct	$18,400	$11,069	Deposit
Nov	$34,900	$22,138	Base
Dec	$28,600	$33,207	Frame
Jan	$12,200	—	—
Feb	$41,300	$77,483	Lock-up
Mar	$38,700	$55,345	Fixing
Apr	$17,500	$22,138	Completion

November is the pinch. $34,900 going out against $22,138 coming in, on top of October's shortfall — so roughly $20,000 of the builder's own money is in the job before the frame claim lands in December.

January is the opposite: little happening, nothing to claim. Worth knowing before committing to anything else that month.

None of that is visible from the contract total. It is only visible from the shape.

Reducing the peak

Three levers, in order of how often they work:

1. **Claim promptly.** A claim raised the day a stage is reached rather than a fortnight later moves the whole income side left. Cheapest fix available.
2. **Negotiate supplier terms.** Moving a large trade from 14 days to 30 shifts a significant outflow past a claim.
3. **Re-sequence.** Sometimes expensive trades can be separated so they do not coincide. Constrained by the critical path, and worth checking on the Gantt before assuming it is possible.

Across several jobs

The peak that matters is not any one job's — it is the sum across every job running at once.

Two jobs whose expensive months coincide can create a peak neither shows on its own. If you are deciding when to start the next job, checking that overlap is worth more than almost any other planning you can do.

All jobs

At the top left of the Cash flow tab, **This job** and **All jobs** switch between the job that is open and every job added together: the cash flow of the business. You do not need a job open to use **All jobs**.

The sheet has three parts, on the same week or month columns:

Part	Shows
Money in	One row per job: its contract stages, on their expected dates
Money out	One row per job: its scheduled task costs, on the dates they are due to be paid
What is left	Money in minus money out for each week or month, then the running total

Every figure includes GST, so money in and money out are on the same footing. A job's row equals the **Total income** and **Total expenses (Inc GST)** rows on that job's own cash flow. Click the job's name to open it.

Choosing what to count

- **Weekly** and **Monthly** set the width of a column.
- **Show** sets how far ahead the sheet runs, starting from this week or month: 3, 6 or 12 months, or **Everything**, which runs from the first dated dollar to the last.
- **Jobs** starts on **Current jobs**, which leaves out archived jobs and sales estimates (a quote you have not won is not money you can count on). You can also show all jobs, or the jobs at one status.
- **The tick box on each job** leaves that job out of every total. Use it when a job has two estimates and only one of them should count. The job stays listed, struck through, so you can tick it back in. Your choice is remembered on that device.

Your bank balance

Type what is in the bank into **Cash at bank today**. The bottom row then starts from that figure and reads as your expected bank balance at the end of each week or month. When the running total goes below zero, the top right of the page says how far and when (**Lowest**). That is the size of the gap to cover, and the date you need it covered by.

What the sheet tells you it left out

Under the sheet, a note lists money it could not place: amounts dated before the first column or after the last one, and amounts with no date at all (a costed task the schedule has not dated yet, or a contract stage with no expected date). Nothing is dropped silently.

What it does not know

This is a forecast built from each job's schedule and contract stages. It does not know what has already been paid or claimed, and it does not include overheads such as wages, rent or loan repayments. Read it as "what the jobs will do to the bank account", not as a full set of accounts.

S-Curve and **Export to Excel** work here the same way they do for one job.

You need the **Cash Flow** and **See Costs** permissions, and you only see the jobs you have access to.

29.11 Reports and printing BUILDER PLAN

Printing the Gantt or a two-to-six-week lookahead, and the job and all-jobs reports - who is doing what, what is due, progress, claims and delays.

The **Reports** menu on the Schedule's top toolbar is where the schedule comes off the screen: a printed chart for the site office, a lookahead for the trades, and reports that answer the questions you get asked every week.

Printing the chart

Reports › Print or save as PDF... asks what to print:

Choose	What you get
The whole job	Every task, start to finish
Lookahead next 2, 3 or 6 weeks	Only the tasks happening in those weeks
Dates I choose	Any stretch you set

Then tick what to show: the **trade** on each task, the **booked dates**, the **baseline**. **Leave out finished tasks** keeps a job six months in down to what is left. If the Stage picker is set, only that stage prints.

It prints landscape: the task list on the left, the bars scaled to fit the page, the headings repeated on every page and a line for today. The link arrows are left off on purpose — on paper they turn into a tangle nobody can follow.

To get a file, choose **Save as PDF** as the printer. For a long job, **A3** keeps it readable.

Lookahead

Reports › Lookahead (2, 3 or 6 weeks)... goes straight to the short version. It keeps only the tasks happening in those weeks — including ones already under way — plus the groups they sit in, so each task still reads in context.

It is the sheet for a site meeting or a trade: what is on, and who is on, over the next fortnight or so. Nobody on site needs the whole programme.

This job

Report	What it shows
Who is doing what	The tasks grouped by trade. Tick to include finished work
Due and upcoming	What is late, what should have started, and what starts or finishes in the next 7, 14 or 28 days
Progress	Each stage: tasks, finished, percent done, planned finish and how many are late. Then every task with its status — *Finished*, *Under way*, *Should have started*, *Late*, *Not started* — and its delay days
Progress claims	Each contract stage, the task it is linked to, that task's percent done, the expected date, and **Ready to claim** once the task is 100% done
Delay report	The delays recorded on this job
Export tasks to Excel	Every task, in outline order, as a file Excel opens

Progress weights percent done by working days, so a finished ten-day frame counts for more than a finished one-day clean. It is the honest answer to "how far along are we?"

Progress claims also shows each stage's amount including GST, and the total ready to claim, if you are allowed to see cash flow. Stages are linked to tasks under Contract stages. A claim that is ready and not yet sent is money you are waiting for without asking.

Export tasks to Excel has the dates, days, percent done, critical path, float, delay days, trade, booked dates and booking status, milestone and note for each task — and the cost, if you are allowed to see it.

All jobs

The same questions, across the business. These only include jobs you have access to.

Report	What it shows
Due and upcoming	As for one job, and includes late work from the last six months
Who is doing what	Each trade's work over the next 7, 14, 28 or 56 days — booked dates where there is a booking, otherwise planned
Progress	Each job side by side: site manager, tasks, finished, percent done, late, delay days and the last finish date
Delays	Delays recorded in the last 30, 90, 180 or 365 days — by job, by cause, and every delay

Delays by cause is the one to look at once a quarter. If one supplier or one inspection keeps turning up, that is a conversation worth having before the next job.

Printing and downloading a report

Every report has **Print**, which prints portrait, and **Download for Excel**, which gives you the same rows as a file to sort, filter or send on.

> **Take the lookahead to the site meeting** — A two-week lookahead, printed with trades and booked dates, is the agenda: go down it, confirm each trade, and anything nobody can vouch for is the thing to chase.

CHAPTER 30

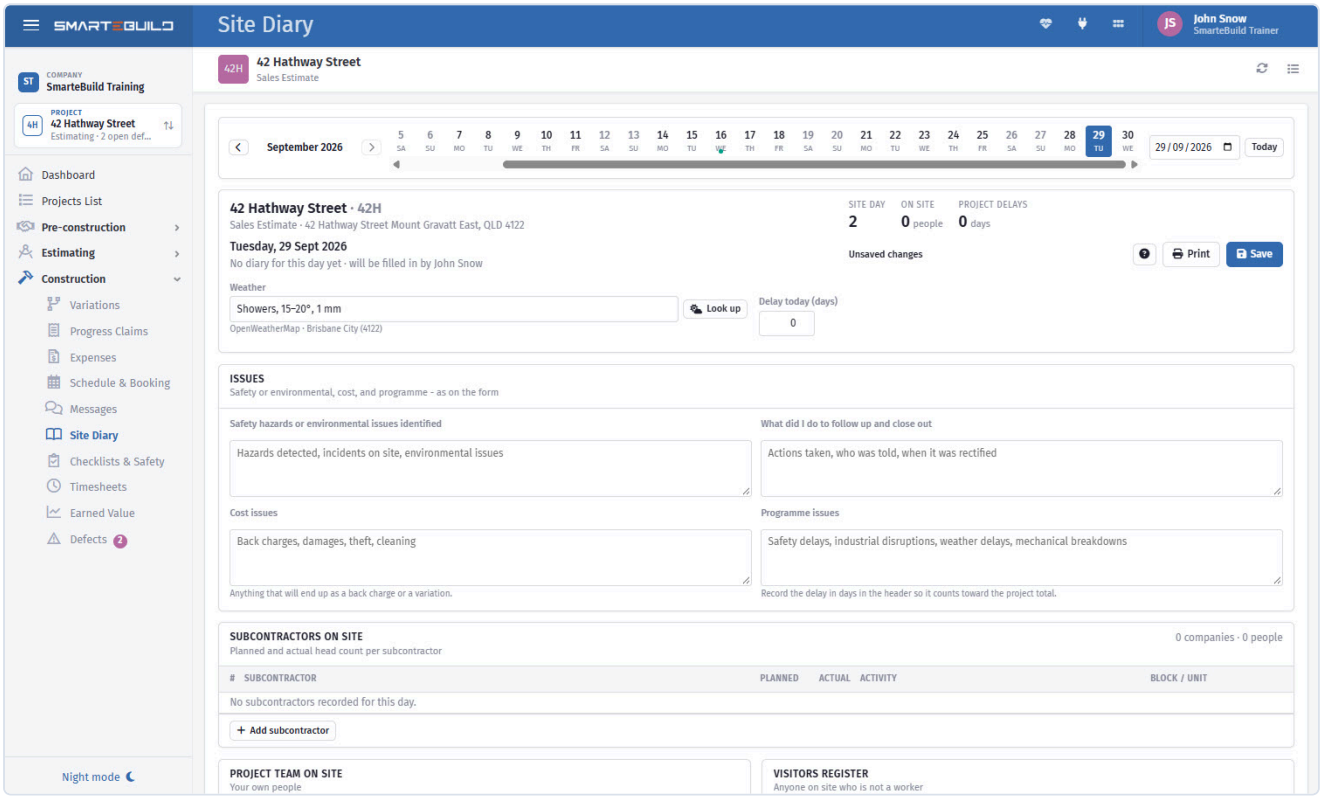
Site diary

30.1 What the site diary is for BUILDER PLAN

A daily record of what happened on site - who was there, what arrived, what went wrong - and why it is the cheapest insurance on a job.

The site diary is a day-by-day record of what actually happened on a job: who was there, what arrived, what held things up, and what anybody should know later.

It is the cheapest insurance available on a building job, and it only works if it is written on the day.



A day-by-day record of what actually happened on site.

Why keep one

Three reasons, in increasing order of money.

It explains the programme. A job four weeks late with eleven recorded wet days is a completely different conversation from a job four weeks late for no recorded reason. One is weather; the other looks like incompetence.

It supports extensions of time. Most building contracts allow an extension for delays outside your control, and nearly all require notice within a set period. A contemporaneous record is what makes that claim work — a reconstruction is not.

It supports compensable delay claims. A delay caused by a client's late decision or a design change is often chargeable. The diary is the evidence, and it is the only evidence that exists.

> **A diary written later is not a diary** — Its value is entirely in being contemporaneous. Reconstructed on Friday from memory it records what you now believe happened, which is worth very little when the point of the exercise is proving what did.

What a day holds

Section	Records
Project team on site	Your own people
Subcontractors on site	Which trades, and how many
Visitors register	The client, a surveyor, an inspector, anyone else
Deliveries	What arrived, from whom
Project delays	Time lost, and the reason
Issues	Anything affecting **cost** or **programme**
Notes	Everything else
Photos	With captions

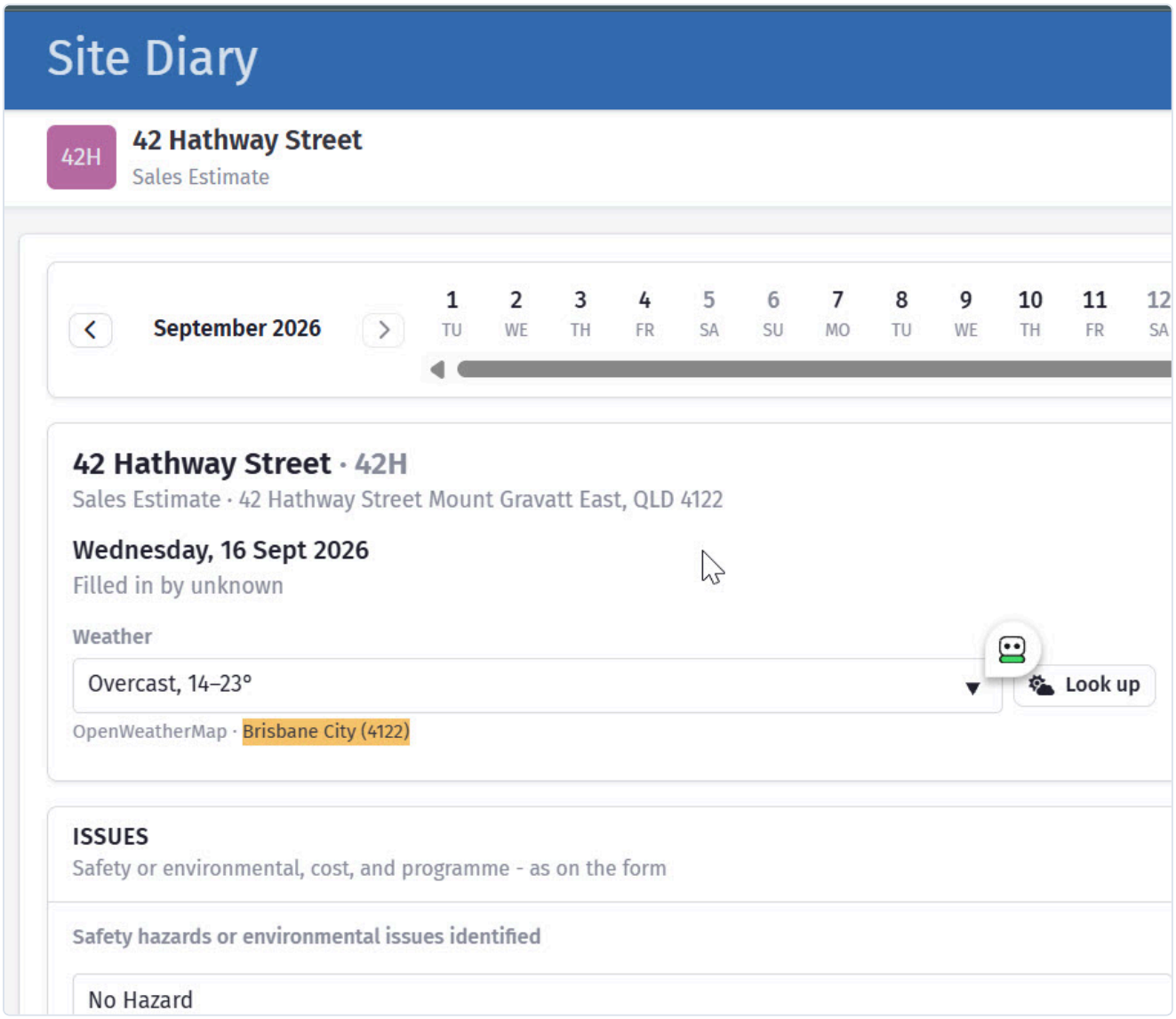
Delay today (days) is the headline figure for the day — how much time the job actually lost.

Where it gets written

On the phone, on site, as the day happens. That is what the mobile app is for, and it is the difference between a diary that exists and one that does not. See The site diary on site.

The desktop is for reviewing a run of days, printing a day as a formal diary form, and pulling delays together when you need to claim.

Weather



Recorded automatically from the postcode, which is what makes a wet day claimable.

Weather is recorded against the day automatically, from the site's **postcode** — or its suburb, if the project has no postcode yet. Both are set under Edit Project.

That matters because wet-weather delays are the most commonly claimed and the most commonly disputed. A recorded delay sitting next to the recorded weather for that day is a far stronger position than a note saying it rained.

In this section

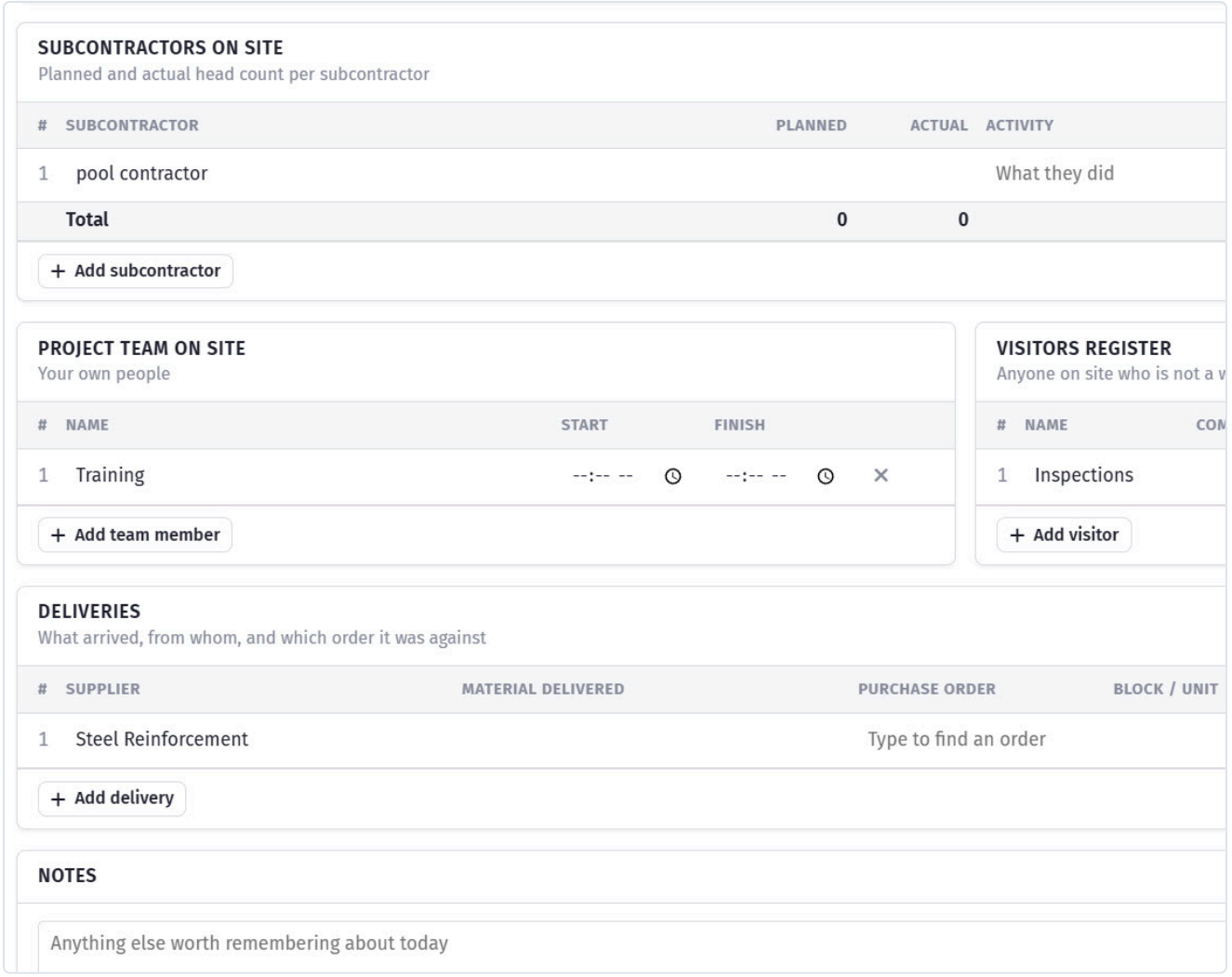
- Filling in a day
- Delays and issues

30.2 Filling in a day BUILDER PLAN

Moving between days, recording who was on site, deliveries, photos and notes, and printing the day as a

diary form.

The diary opens on today. The **day strip** across the top moves between days, and **Go to date** jumps to any day directly.



Who was there, what arrived, and what held the job up.

Who was on site

Three separate registers, because they answer different questions:

Project team on site — your own people. This is what a labour cost query is checked against.

Subcontractors on site — which trades were there, and how many. The record that matters when a subcontractor claims they were on site for six days and you have four.

Visitors register — the client, a building surveyor, an engineer, a delivery driver who needed signing in. On a job with any safety obligation this is not optional, and it is much easier kept daily than reconstructed.

Deliveries

What arrived, and from whom.

Record the docket number and anything wrong with the delivery — short counts, damage, wrong product. That note is what supports a credit claim three weeks later when the supplier's statement does not match

what you received.

Photos

Photographs with captions, and the part of the diary that pays for itself.

Photograph anything you might need to prove: the excavation before the pour, the rock that stopped the digger, the frame the inspector passed, the state of the neighbouring fence before you started.

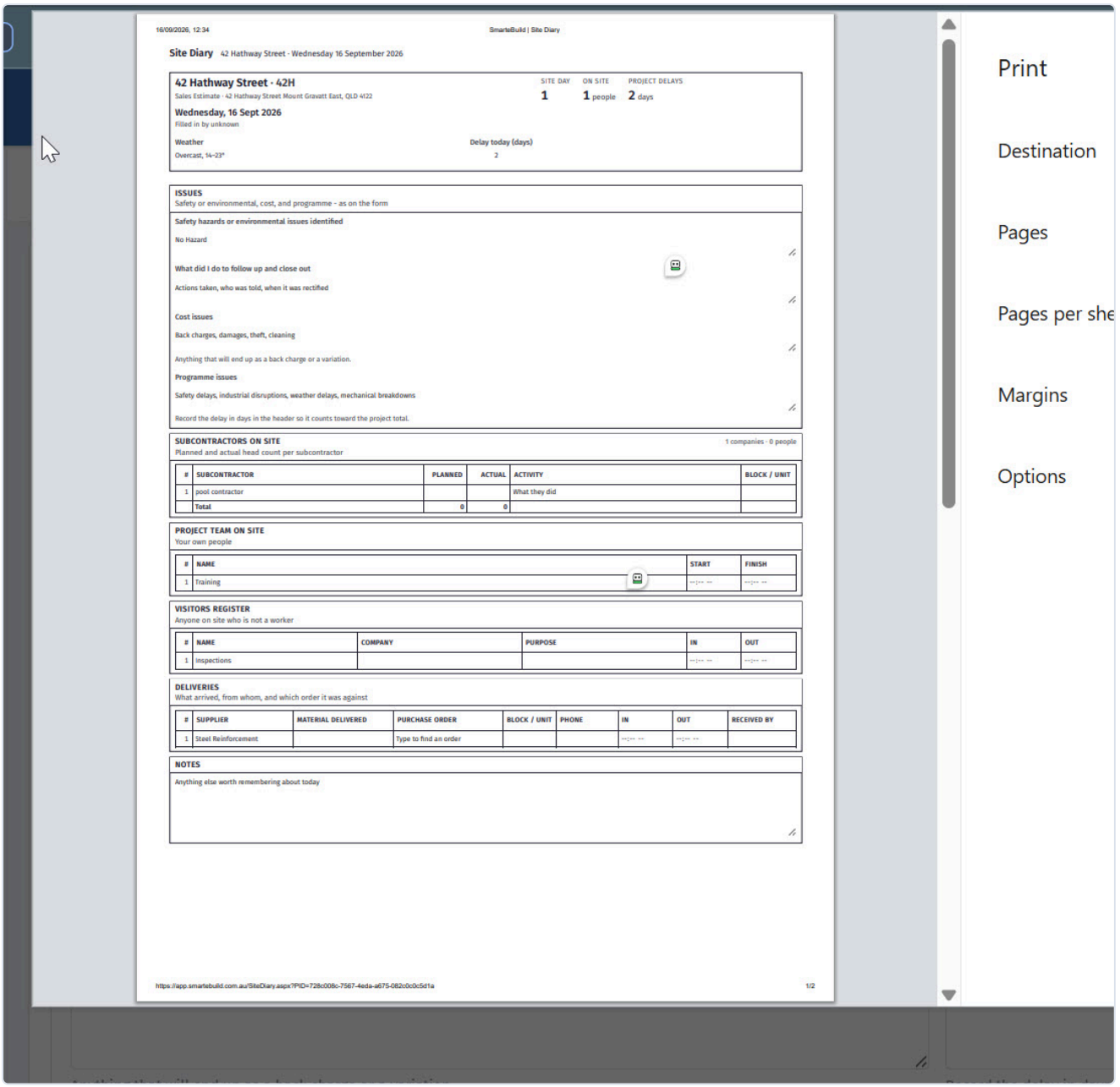
> **Caption them at the time** — An uncaptioned photo in a folder of two hundred is nearly useless. Thirty seconds of caption while you still remember what you were photographing is what makes it evidence rather than a picture.

Notes

Everything that does not fit elsewhere. Write for someone reading it in a year who was not there — because that is exactly who reads a diary.

Weak	Better
`Rain`	`Rain from 11am, 4 hours lost, pour postponed to Thursday`
`Delivery`	`Frame delivery, Surf Coast Steel, docket 88421, 2 bundles short — chased`
`Client visit`	`Client on site 2pm, confirmed alfresco extension, variation to follow`

Printing a day



This is what you attach to an extension of time claim.

Print this day as the diary form produces the day as a formal document.

That is what you attach to an extension of time claim, hand to a superintendent, or keep on file. A printed run of days around a disputed period is a much stronger submission than an assertion about what happened.

Deleting a day

Delete day removes an entry. Use it for a day created by mistake, not to tidy up a day you would rather not have recorded.

A diary with gaps around the difficult weeks is worse than no diary — it invites exactly the question you did not want asked.

Doing it on the phone

Almost all of this is better done on site as the day happens. The app has the same day view, plus dictation for the notes. See The site diary on site.

A workable habit

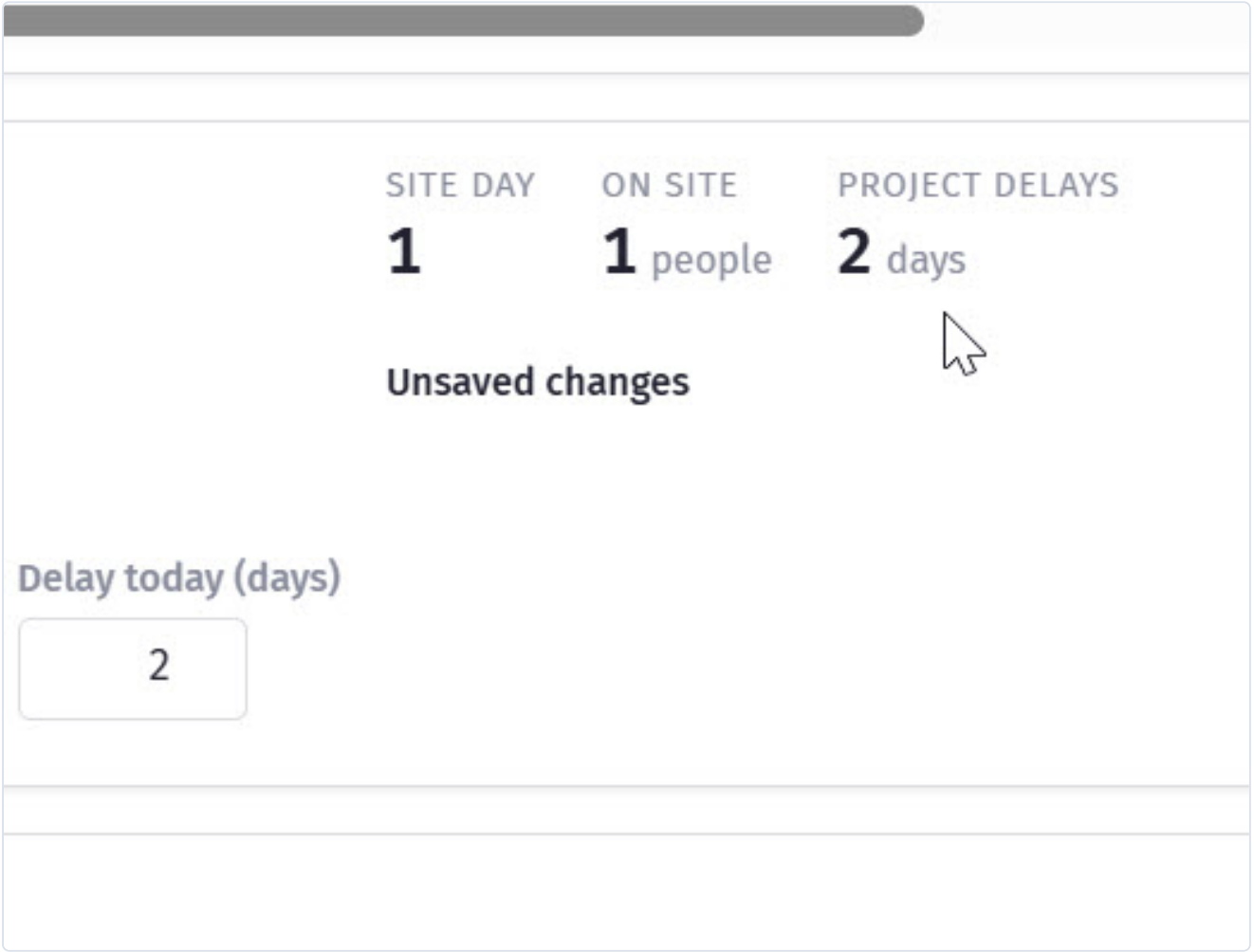
- **Morning** — who is on site, in both registers.
- **As things happen** — deliveries, visitors, anything that goes wrong.
- **End of day** — the delay figure, and the photos captioned.

Five minutes across the day. The alternative is an hour on Friday producing something that will not stand up.

30.3 Delays and issues BUILDER PLAN

Recording lost time and the reason for it, separating cost issues from programme issues, and turning the record into an extension of time claim.

The delay record is the part of the diary that turns into money, or fails to.



The cause decides who pays, so record it specifically.

Recording a delay

Project delays records what held the job up, and **Delay today (days)** is how much time was actually lost.

Record the **cause** as specifically as you can, because the cause decides who pays:

Cause	Usually
Weather	Extension of time, no cost
Client decision outstanding	Extension **and** often compensable
Design change / late documentation	Extension and often compensable
Latent condition — rock, contamination	Extension and usually a variation
Subcontractor no-show	Yours to absorb
Materials not ordered in time	Yours to absorb

Writing "delay" with no cause makes every one of those rows look the same, which in practice means they are all treated as the last two.

Cost issues and programme issues

Two separate lists, because they are different problems.

Programme issues cost time. **Cost issues** cost money. A single event can be both — rock in the excavation stops the digger *and* costs to remove — and recording it in both places is right.

Keeping them apart makes the diary answerable: *"what has cost us time this month?"* is a different question from *"what has cost us money?"*, and both get asked.

Client-caused delays

The most valuable entries in the diary, and the ones most often left out because they feel awkward to write down.

If a client takes three weeks to choose tiles while the tiler stands by, that is a delay caused by the client. Record it on the day it starts, not on the day you decide to claim for it.

> **Tell the client at the time, too** — A delay recorded but never mentioned is a surprise at the end. A client told *"we are holding the tiler, and each week costs us programme"* usually decides faster — and cannot reasonably object later when the extension is claimed.

Turning the record into a claim

When you need an extension of time:

1. **Find the days.** Filter the diary to the affected period.
2. **Check the causes** are recorded and specific.

3. **Check the weather** matches, for wet-weather days — it is recorded automatically from the site address.
4. **Print the days** as diary forms.
5. **Submit within the contract's notice period.** This is the one that catches people — a well-documented delay claimed too late is worth nothing.

The printed run of days is the submission. It is contemporaneous, it is specific, and it was made before anybody knew there would be an argument, which is exactly what gives it weight.

Delays and the schedule

The diary records that time was lost. The **schedule** is where you move the work.

Recording a delay does not reschedule anything — update the affected task in the Schedule so everything downstream moves with it, and the finish date tells you the truth.

Doing one without the other is the common failure: a diary full of recorded delays next to a programme that still claims the original completion date.

What a good delay entry looks like

> **28 Oct — 1.0 day lost.** Rain from 7am, 22mm. Slab pour scheduled for today postponed; concrete and pump cancelled by 7:30am, no charge. Rescheduled Thursday 31st. Formwork and reo left covered.

Cause, quantity, what it stopped, what it cost, and what happens next. That paragraph is worth more than a month of entries reading "rain".

30.4 The site diary on the phone BUILDER PLAN

Writing the day's diary and taking its photos in the SmarteBuild mobile app, and how it lines up with the desktop.

The mobile app writes the same diary the desktop shows. A day started on site in the morning is what the office sees that afternoon, and a correction made at the desk is what the supervisor sees on the phone.

Opening today

On the job's home screen the **Site Diary** tile says whether today's diary has been started. Tap it, then tap **Start today's diary** (or the day's card if it is already under way). Earlier days are listed below it, most recent first, with who wrote each one and what it recorded.

Filling it in

The sections are the same as the desktop's, stacked as cards:

- **Weather** - filled in for a new day from the site's postcode; tap a condition, type your own, or tap **Look up** to fetch it again.
- **Delay today** - none, half a day, a day, or a figure.
- **Safety, cost and programme issues** - free text.

- **Subcontractors on site** - add a row per company. Start typing and the job's suppliers are suggested. Planned and actual head counts, the activity, the block or unit.
- **Project team on site** - tap your people's names to put them on site; the start time fills in as now. Tap the clock beside a time to set it to the current time.
- **Deliveries** - supplier, what arrived, the purchase order it was against (the supplier's orders are offered), driver's phone, in and out, who received it.
- **Visitors** - name, company, purpose, in and out.
- **Notes** - anything else.

On a new day, **Copy from** brings across the last diary's subcontractors and team.

Photos

Take photo opens the camera; **Choose photos** lets you pick several at once from the phone. Photos upload straight away and appear on the desktop within seconds. They are filed in the job's Documents under **Site Diary Photos**.

The time the photo was taken, and where, are recorded from the phone when the phone provides them.

Hold a photo to remove it from the diary.

Saving

Everything except photos waits for **Save** (top right, or the button at the bottom). Leaving the day with unsaved changes asks first.

When there is no signal

Photos and saves need a connection. If the app cannot reach the server it says so and keeps what you typed on screen; save again when the signal is back. Do not close the app in between.

CHAPTER 31

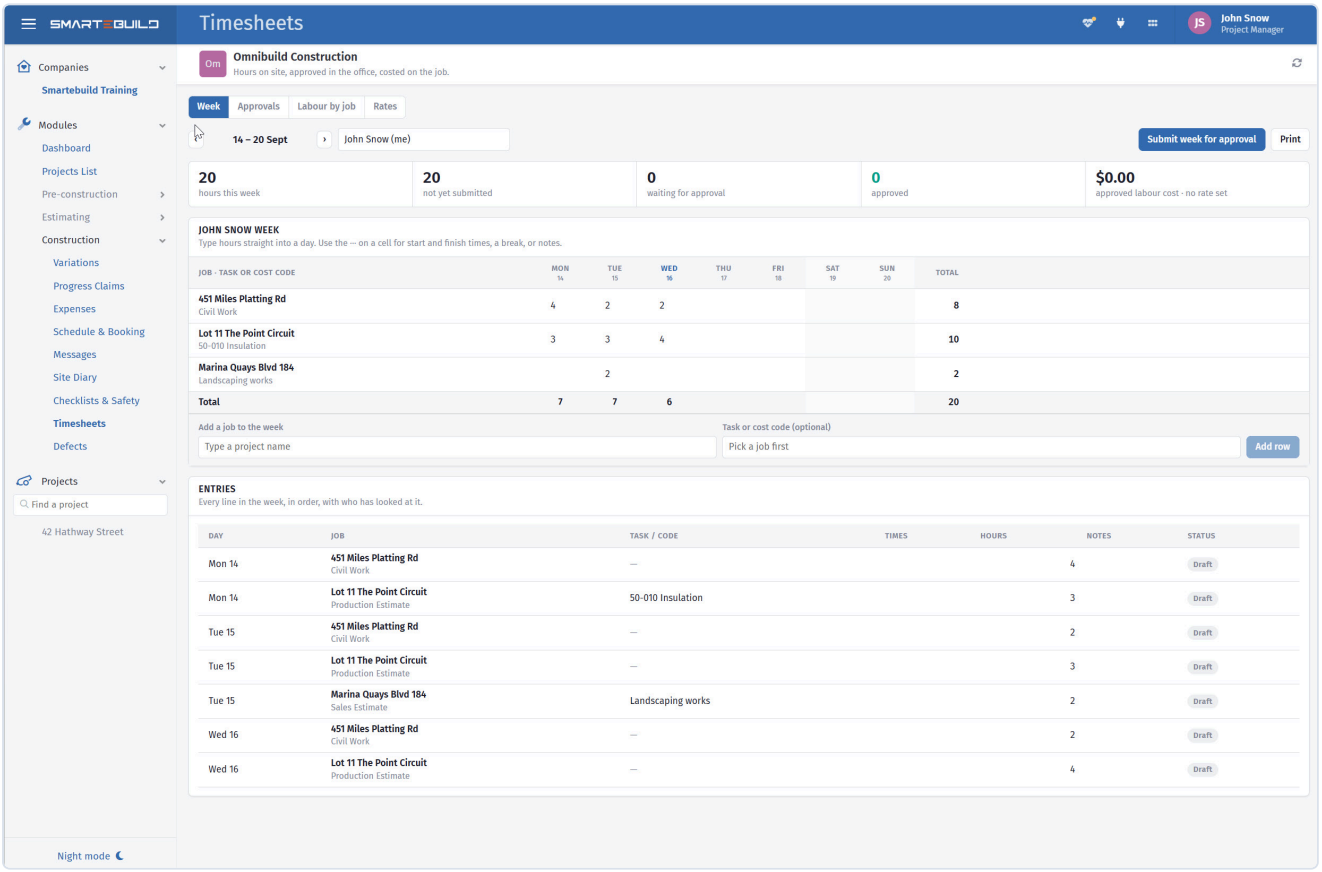
Timesheets

31.1 How timesheets work BUILDER PLAN

Hours captured on site, approved at a desk, and costed to the job they were worked on.

Timesheets record the hours your own people work, approve them, and turn the approved hours into labour cost against the right job.

That last part is the point. Most builders know what their wages bill is; far fewer know what each job's share of it was.



Hours against jobs, so labour lands on the right cost code.

The four tabs

Tab	For
Week	The week's entries, by person
Jobs	Labour by job — where the hours actually went
Rates	What each person costs per hour
Approvals	Reviewing and approving draft entries

The flow

1. **Hours are captured** — clocked in and out on site, on the phone.
2. **They sit as draft.** Nothing is costed yet.
3. **They are reviewed and approved** at a desk.
4. **Approved hours × the person's rate** become labour cost on that job.

The draft/approved split is what makes the whole thing workable. Clocking in is low-stakes — nobody commits a cost by tapping a button — and somebody looks at the week before it turns into money.

Why the job matters more than the total

A supervisor who splits a week across four sites produces four entries, not one.

Without that, labour is a business overhead: you know it cost $8,400 and nothing about which job absorbed it. With it, each job carries its real labour cost, and cost against budget includes the largest cost most builders never allocate.

It also feeds back into estimating. Three jobs where the framing labour ran 20% over the allowance is a rate that needs changing, and you cannot see that unless the hours were costed to jobs.

Capture it on site

Hours reconstructed on Friday are wrong in a predictable direction — round numbers, forgotten short visits, and the half-day nobody can place.

Clocking in on the phone takes one tap and produces a time. See Timesheets and bookings.

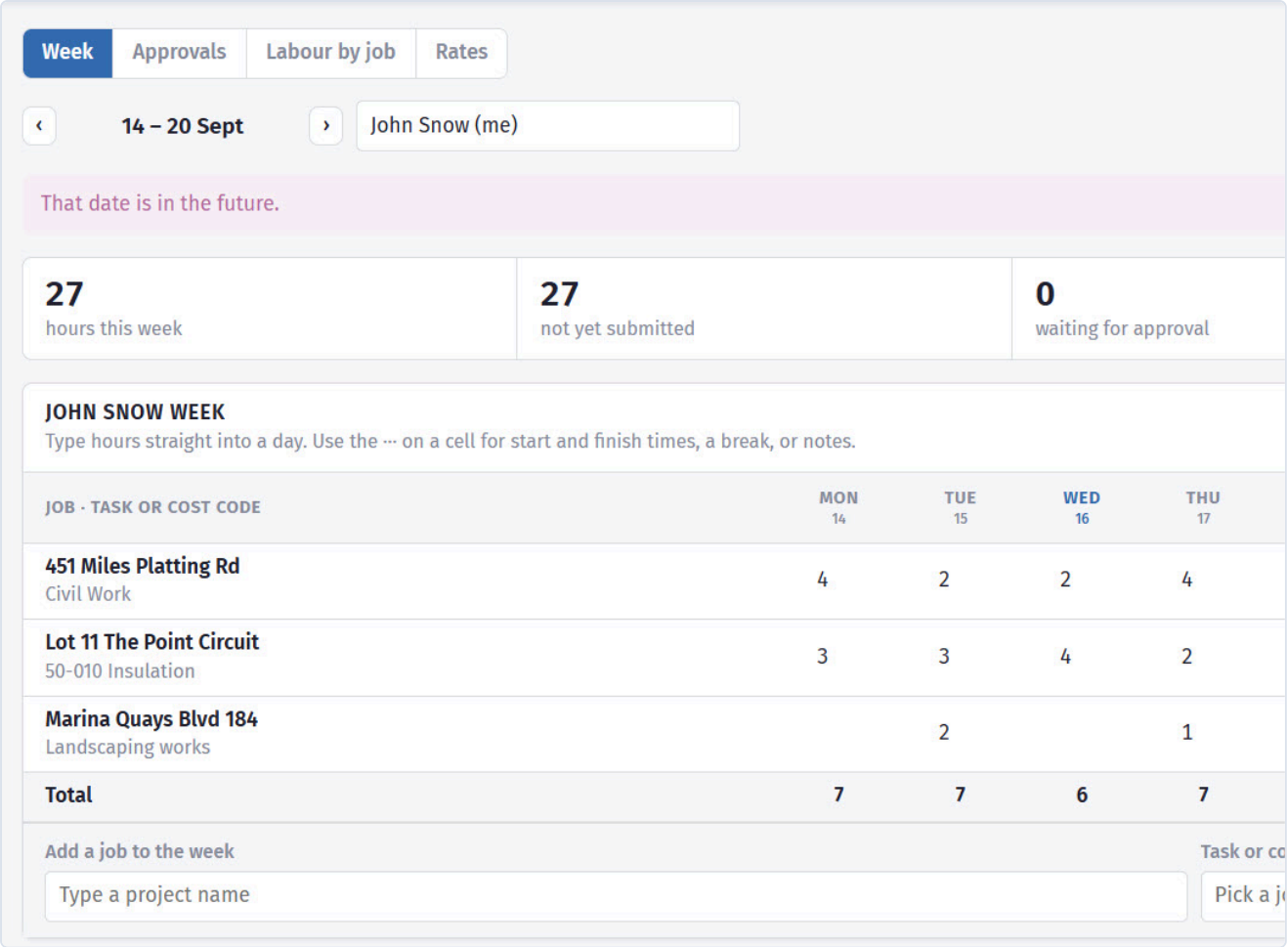
In this section

- The week
- Approving hours and labour cost

31.2 The week BUILDER PLAN

Entering and editing hours on the Week tab, adding a job to someone's week, and submitting for approval.

The **Week** tab is where hours are entered and read. Everyone sees their own week; approvers also see the tabs covered in Approving hours and labour cost.



The week as the person filling it in sees it.

Reading the week

The week's entries with a running total. The date controls move between weeks.

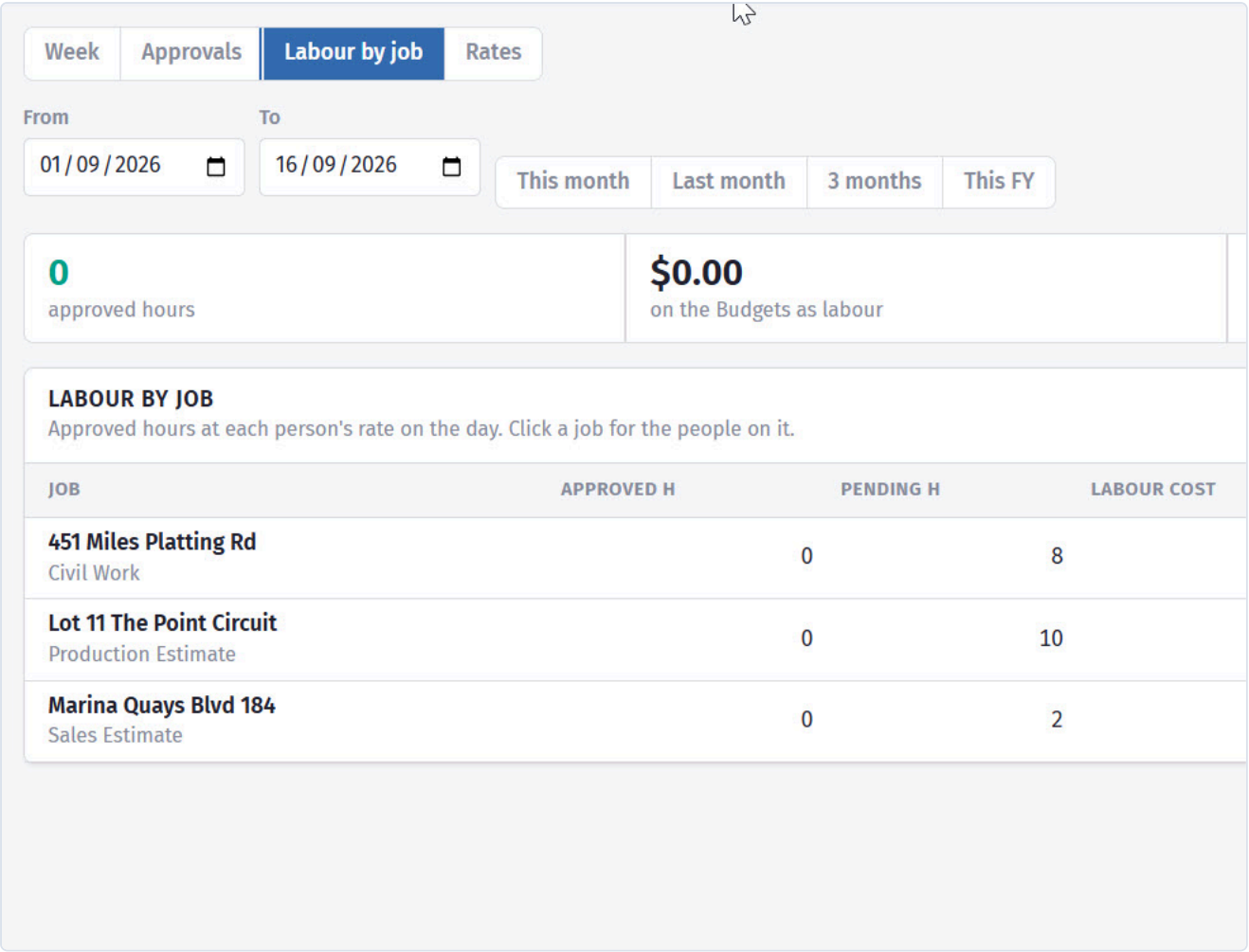
Each entry carries:

Field	
From / Finish	Start and end
Break (min)	Unpaid time, so paid hours are hours worked rather than time on site
Hours	What that works out to
Job	Which project the time is against
Task or code	Where the cost lands
Status	Draft, Submitted, Approved

Add a job to the week puts a job onto the week so time can be entered against it — useful when hours are typed at a desk rather than clocked in on site.

Entry details opens one entry to correct it.

Split the week by job



Split the day across jobs and each one carries its own labour.

A supervisor across four sites in a week produces entries against four jobs, not one total.

That is the whole point of the module. Without the split, labour is a business overhead — you know the week cost $8,400 and nothing about which job absorbed it. With it, each job carries its real labour cost, and cost against budget includes the largest cost most builders never allocate.

Entering versus clocking

Hours reconstructed on Friday are wrong in a predictable direction — round numbers, forgotten short visits, and the half-day nobody can place.

Clocking in and out on the phone takes one tap and produces a real time. See Timesheets on the phone.

> **Clock in before you start, not after** — The entry records when you tapped, not when you meant to. Tapping at 7am and starting at 7am produces a true record; tapping at 10am and estimating backwards produces exactly the thing you were trying to get away from.

Submitting

Entries start as **Draft**. Submitting hands them to an approver.

Nothing is costed to a job until it is approved, so submitting commits nothing — it just says the week is ready to be looked at. An approver can approve Draft entries too, for the person who never presses Submit.

If a week is **sent back**, the reason appears on your week. Fix the entries and submit again.

Correcting entries

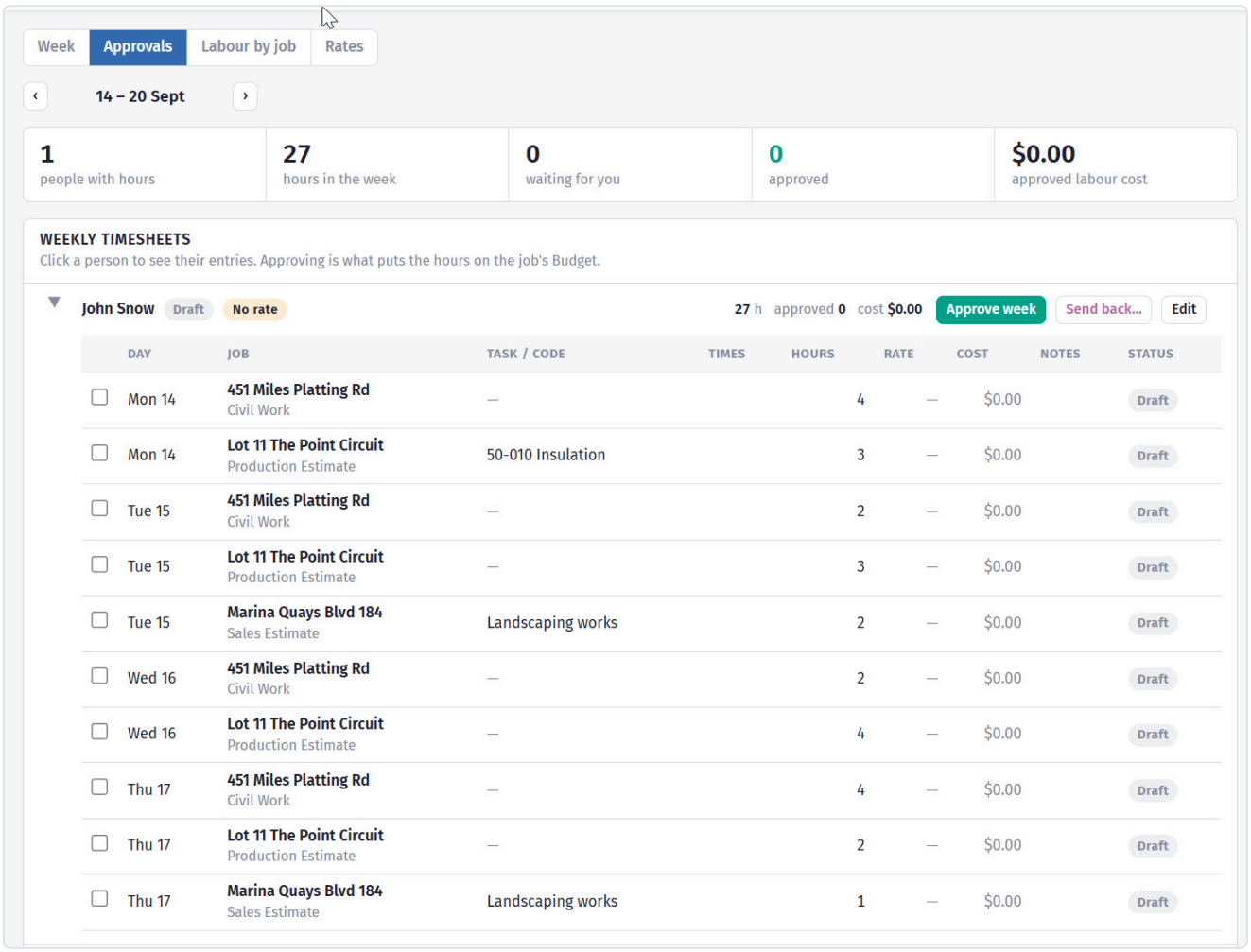
Entries can be corrected until they are approved. A clock-out that never happened, a break that was not recorded, a job picked wrongly on a phone — all normal, and all better fixed than left.

Once approved, an approver has to **unapprove** it before it can change, which also takes the cost back off the job.

31.3 Approving hours and labour cost BUILDER PLAN

The Approvals tab, hourly cost rates, and how approved hours become actual cost on the Budget and the WBS.

Only an **approver** sees these tabs. An approver is a user whose SmarteBuild account has **Admin** ticked (Project Details, Users). Everyone else sees their own week and nothing about money.



Nothing reaches the job cost until somebody approves it.

Rates first

Nothing costs anything until each person has an **hourly cost**. On the **Rates** tab, enter what an hour of that person costs the business - wage plus super, leave loading, workers compensation, allowances - ex GST. This is a cost, not a charge-out rate.

Rates are dated. Enter a new rate **from** a date and earlier weeks keep the rate they had; approval always uses the rate in force on the day worked. The history under each name shows every rate and who set it.

A person with no rate shows a **No rate** tag on the Approvals tab. Their hours can still be approved, but they go onto the job at $0 until a rate is set and the week is unapproved and approved again.

> **Estimate at the wage understates every job** — An hourly wage of $38 is not $38 of cost. With superannuation, workers compensation, leave loading, public holidays, allowances and the non-productive time you pay for, the real figure is commonly **1.3 to 1.6 times the wage**.
>
> If you enter the wage, every job looks more profitable than it is — by the same percentage on every job, so nothing ever looks anomalous enough to investigate. Work the true figure out once, with your accountant.

The Approvals tab

Pick the week. Everyone in the company who entered hours is listed with their total, what is still waiting, and the labour cost of what has been approved. Open a person to see each entry: day, job, task or code, times, hours, rate, cost, notes, and where it came from (typed on the desktop, typed on the phone, or a clock-in, marked with a pin when the phone recorded a location).

- **Approve week** approves everything of that person's that is not already approved - Submitted entries, and Draft ones too, for the worker who never presses Submit.
- **Send back...** rejects them with a reason. The worker reads the reason on their week, fixes the entries, and submits again.
- Tick individual entries to approve, reject or unapprove just those, across people.
- **Approve everything submitted** at the top does the whole week in one click when it all looks right.

Unapprove takes an approved entry back to Submitted, and takes its cost off the job. Use it when a rate was wrong or a week was approved too soon.

What to actually check

Approving is not a formality, and it is not about doubting people. Four things catch almost everything:

Missing clock-outs. A shift showing fourteen hours is nearly always somebody who forgot to clock out, not somebody who worked fourteen hours.

The job. The most common genuine error — a phone left on yesterday's job when somebody moved sites at lunchtime. It is also the error that quietly corrupts job estimate, because the hours land on the wrong budget.

Breaks. Recorded, and realistic.

Days that look odd. Weekend work, unusually long or short days, someone on a job they were not scheduled for. Usually explicable; occasionally the first sign the programme is not going the way you think.

Correct entries — do not tidy them. If a job overran, the timesheet showing it overran is the useful artefact. Trimming hours to fit the allowance produces a job that looks fine and an estimate that stays wrong.

Where the cost goes

Approving is the moment the money moves. Each approved entry's **hours × rate** is added to the job's **actual cost**, alongside supplier invoices:

- On the **WBS** and **Budget** pages, the actual cost of the cost code the entry was coded to goes up (a task's hours go to the task's cost code). Hours with no code count in the job's total but sit on no line.
- On the **Projects List** and the **Dashboard**, the job's actual cost and variance include it.
- The **Budget** page's *Invoices* drill-down stays invoices only; the labour behind a number is on the **Labour by job** tab here.

The rate is copied onto the entry at approval, so changing a person's rate later never rewrites a week that has already been approved.

What does **not** happen: no invoice, bill or expense is created, nothing goes to Xero, and the cashflow does not change. Labour is not a supplier bill; payroll is paid whatever the timesheets say.

Labour by job

The **Labour by job** tab totals approved hours and cost per job over any date range, with the people on each job underneath, and shows how many hours are still waiting for approval. It is the figure to compare against the labour allowance in the estimate.

> **Approve weekly** — The Budget is only as current as the last approval. A Monday morning habit - open Approvals, read last week, approve or send back - keeps the labour cost on every job within a week of the truth.

31.4 Timesheets on the phone BUILDER PLAN

Clock in and out on the job from the mobile app, or type a day's hours, and submit the week from site.

The mobile app is where hours should be recorded: on the day, on the job, by the person who worked them. Everything it writes is the same timesheet the office sees on the desktop.

Clock in, clock out

Open the project, tap **Timesheets**, tap **Clock in**. Pick the task or cost code if you want the hours against one, add a note if you like, and go. The app records the start time and, when location is allowed, where you were.

At the end of the day tap **Clock out**, enter the break you took, and the hours are worked out for you. The entry shows in your week straight away.

One clock at a time: if you are already clocked in on another job the app tells you which one and asks you to clock out of it first. A clock left running overnight is closed at midnight with a note asking you to check it - fix the finish time on the desktop, or delete the entry (hold it in the week list) and type the day. If a clock has been running for more than twelve hours the Timesheets screen turns red to remind you.

Typing a day

Not everyone wants a running clock. **Add hours** takes a job (the one you have open is already picked), a day of the current week, and either the hours or a start and finish with a break - if you give the times, the hours come from them. A task or cost code is optional. Tap an entry later to change it; hold it to delete it.

Your week

The week view shows Monday to Sunday with the hours per day and each entry underneath, with its status. Use the arrows to look back at earlier weeks. When the week is done, **Submit week** sends it to the office; **Recall submitted hours** takes it back if you were too quick. Anything the office sends back shows in red with the reason; tap it, fix it, and submit again.

You cannot approve, see rates, or see anyone else's hours from the phone. That is the office's job, on the desktop: Approving hours and labour cost.

The Home screen tile

The **Timesheets** tile on the project's Home screen shows today's hours on that job and whether you are clocked in, so a forgotten clock is hard to miss.

CHAPTER 32

Earned value

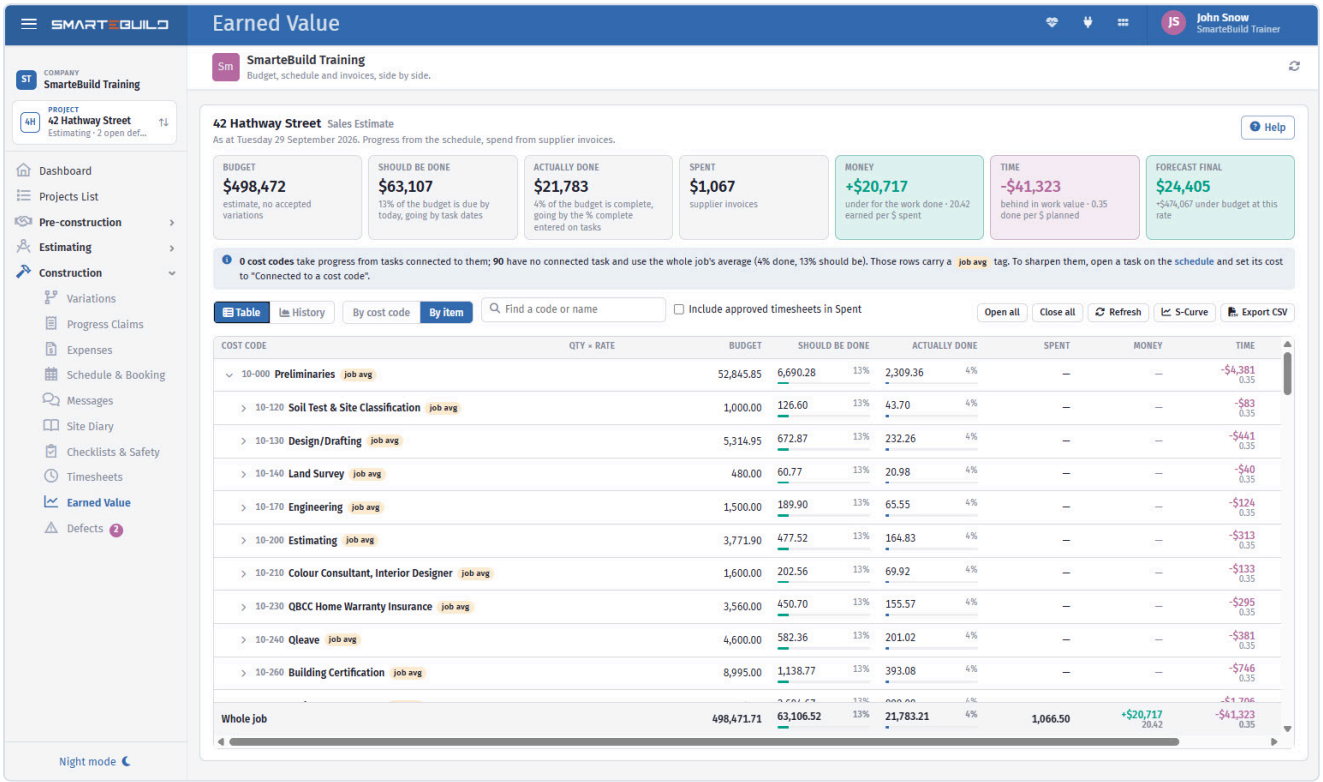
Is the job ahead or behind, under or over? BUILDER PLAN

Earned Value puts the estimate, the schedule and the supplier invoices side by side for one job, and forecasts the final cost.

Earned Value answers two questions about a job, in dollars, on one page:

- **Time** — is the work ahead of the schedule or behind it?
- **Money** — for the work that *is* done, have we spent more or less than we allowed?

Then it uses the answer to the second question to forecast what the job will cost in the end.



Budget, what should be done by today, what actually is done, what has been spent — and the forecast final cost that follows from them.

You will find it under **Construction › Earned Value** once a job is selected.

If you know Earned Value already

The page uses plain words for the standard quantities:

On the page	Standard term	How this page gets it
Budget	BAC	The estimate for that cost code, plus accepted variations
Should be done	PV	Budget × how far through each task should be by today, going only by its dates
Actually done	EV	Budget × the % complete someone has entered on each task
Spent	AC	Supplier invoices coded to that code (timesheet labour only if you tick it)
Money	CV and CPI	EV − AC, and EV ÷ AC
Time	SV and SPI	EV − PV, and EV ÷ PV
Forecast final	EAC and VAC	AC + (BAC − EV) ÷ CPI, and BAC − EAC

Two choices the method leaves open are made for you. **Percent complete comes from the schedule**: a task connected to a cost code drives that code, and a code with no connected task follows the whole job's average and is tagged *job avg*. **Spent is invoices only**: purchase orders are commitments, so a job with work done but invoices not yet in looks under budget. The same explanation is behind the **Help** button on the page.

Where the numbers come from

Nothing on this page is typed in. It reads three things you already keep:

Column	Comes from
Budget	The estimate — the same figure as the Cost Codes grid — plus any **accepted** variations
Should be done	The task **dates** on the schedule: how far through each task ought to be by today, on the job's working days. Nobody types this; it moves by itself every day
Actually done	The ***% complete* someone has entered** on each task (a task with an actual finish date counts as 100%). It only moves when the schedule is updated
Spent	**Supplier invoices** (expenses) — an invoice line counts against the item it names, or the cost code it is coded to

That last one is deliberate. Purchase orders are commitments, not spend; the page only counts money that has actually been invoiced. If you also want your own people's wages in the picture, tick **Include approved timesheets in Spent** and the approved hours × cost rate from Timesheets are added, the same way the Cost Codes grid does it.

Should be done against Actually done

Both come from the schedule, but from **two different things on the same task**, and the gap between them is the whole point.

- **Should be done** looks only at a task's **dates**. A ten-day task that started six working days ago should be 60% done today. Nobody enters it; it moves on its own.
- **Actually done** looks only at the **% complete someone has entered** on the task. It moves only when the schedule is updated.

A $100,000 frame that is 60% due by today and 40% entered gives $60,000 *should be done* and $40,000 *actually done*, so **Time** reads $20,000 behind. If the two were always equal, Time would always be zero. It also means a schedule nobody updates makes a job look far behind when it is not.

Reading the tiles

Seven tiles across the top, in the order the story is told:

1. **Budget** — what the job should cost.
2. **Should be done** — the slice of the budget that is due by today, going only by task dates.
3. **Actually done** — the slice that is complete, going by the % complete entered on tasks.
4. **Spent** — what has gone out.
5. **Money** — *Actually done* minus *Spent*. Positive (green) means the work done so far cost less than allowed; negative (pink) means more. The small number is "dollars earned per dollar spent" — 1.00 is on budget, 0.90 means every dollar bought 90 cents of work.
6. **Time** — *Actually done* minus *Should be done*. Positive means ahead of the schedule, negative means behind, both in dollars of work rather than days. The small number is "done per planned" — 1.00 is on time.
7. **Forecast final** — if the rest of the job goes the way the first part has, this is what it will cost. Underneath: how far under or over budget that lands.

If you know the classic terms, they are in the column tooltips: PV, EV, AC, CV, SV, CPI, SPI, EAC and VAC.

The table

Every cost code on the job, in the same tree as the Cost Codes page, with the same seven figures per row. Parents roll their children up. Click the arrow to open a code; **Open all** / **Close all** do the lot; the page remembers what you had open.

By cost code / By item switches the detail. At item level each BOQ item appears under its code with its quantity × rate, its own invoices, and the same progress as its code (the schedule is connected to codes, not items). Two extra rows can appear under a code so the items always add up to it: *Invoiced to the cost code (no item named)* and, when ticked, *Approved timesheet labour*.

Find a code or name filters the tree and opens whatever matches.

Drag the edge of a column heading to make a column wider or narrower; double-click the edge to put it back. The widths are remembered on that computer.

The tags

- **2 tasks** — progress comes from tasks on the schedule connected to this code. This is what you want.
- **job avg** — nothing on the schedule is connected to this code, so it follows the whole job's average progress. It is a fair guess, not a measurement.
- **mixed** — a parent with some of each underneath.
- **not required** — the code was switched off in Cost Codes; its budget is zero.

A note above the table tells you how many codes are on the job average. To sharpen them, open a task on the schedule, open its cost and choose **Connected to a Cost Code** — the task then drives that code. A task can be split across codes with a percentage.

Behind a row

Click a cost code's name (or an item's, at item level) and a panel opens beside the table with what is behind it:

- **Progress** — the tasks on the schedule connected to that code, with their dates, how far along each should be, how far along it is, and its share of the code if it is split. Click a task and the schedule opens on it. A code with no connected task gets a **Connect a task on the schedule** button instead.
- **Spend** — every supplier invoice with a line against that code (or that item), the supplier, the date, and how much of the invoice belongs to this row. Click one and the expense opens. The list adds up to the row's *Spent*; if timesheet labour is not ticked, the panel says how much there is anyway.

A group row (a code with codes underneath) rolls its children up, so open one of the codes inside it to see tasks and invoices.

Export

Export CSV downloads the whole table at the current level, every row opened out, with the figures as plain numbers and the classic names (PV, EV, AC, CV, CPI, SV, SPI, EAC, VAC) in the column headings, ready for a spreadsheet.

History and the S-curve

Enterprise plan. History is the one part of Earned Value that is not in Builder; the free trial shows it too, so you can see it before deciding. On Builder the History view explains what it adds and shows today's figures; the daily point is still recorded for every job, so an upgrade has the curve from the first day the page was opened.

Switch the view from **Table** to **History** and the page draws the job over time: three lines for *Should be done*, *Actually done* and *Spent*, against the budget as a dashed line. A healthy job has *Actually done* riding on or above *Should be done*, and *Spent* below both.

To glance at the curve without leaving the table, use **S-Curve** on the table's toolbar: the same chart opens in a window over the rows you were reading, and closes back to them (Esc, or click outside it).

- Hover a day to read its figures; click to pin it and the row of tiles above the chart becomes **As at that day** — the job as it looked then. *Back to today* unpins.
- **All / 90 days / 30 days** zoom the range. **Show as table** lists every recorded day.
- One point is recorded per job per day. It is written each night for every live job with a schedule or invoices, and again every time somebody opens this page, so the curve starts the first day the page is opened. **Take a snapshot now** writes today's point on the spot.
- A job opened for the first time today has one point and no line yet; come back tomorrow.

What it needs to work

- **Cost codes and an estimate.** No codes, and the page says so.
- **A schedule with dates.** Without one, only Budget and Spent are filled in and the page tells you why. Tasks with no date (the engine has not run) stay out of *Should be done*.
- **Invoices coded to the job.** Uncoded expenses do not appear in Spent — the Expenses page shows which ones still need coding.

What it does not do yet

- Per-code history. The S-curve and "as at" are for the whole job; the table is always as at today.
- Sorting. Rows stay in cost-code order; use the search to narrow the table.

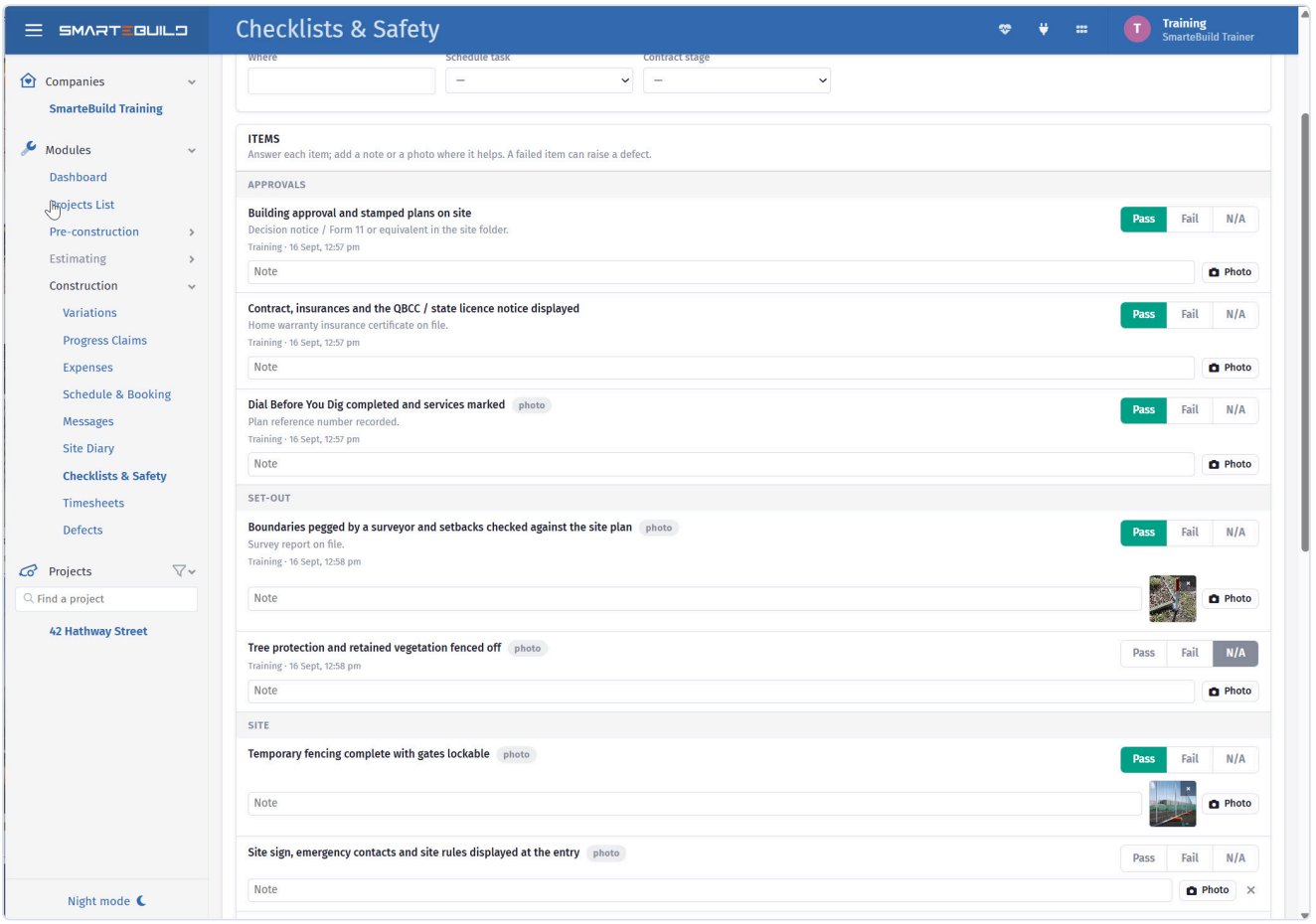
CHAPTER 33

Checklists and safety

33.1 Checklists and safety BUILDER PLAN

Templates, runs and the incident register - how the module is put together and what it is for.

Two related things live here: **checklists**, for the checks you repeat on every job, and the **safety register**, for incidents.



Templates on the left, the runs against your jobs on the right.

Templates and runs

The distinction runs through the whole module.

A **template** is the checklist itself — the items, what each one asks for, and which require a photo. You build it once.

A **run** is one performance of that template on one job on one day. It has answers, photos, a signature and a time.

So "Pre-pour check" is a template; "Pre-pour check, 18 Beach Road, 28 October, 7:42am, signed by Dave Marsh" is a run.

What checklists are for

Two different jobs, and it is worth being clear which you are doing.

Quality. A pre-pour check, a pre-plaster check, a handover inspection. The value is catching the thing before it is covered up.

Compliance. A safety walk, a plant inspection, an SWMS sign-off. The value is being able to show it was done.

The second is why runs capture a signature and a timestamp. "We always check the reinforcement" is an assertion; a closed-out run with six photographs at 7:42am is a record.

The incident register

Near misses, injuries, property damage — anything that needs recording and, later, closing out.

Kept in the same module because the same people fill it in from the same phone, and because an incident often has a checklist behind it.

Where the work happens

Task	Where
Building templates	Desktop
Assigning a template to a contract stage	Desktop
Running a checklist	**Phone, on site**
Capturing photos and the signature	**Phone**
Reporting an incident	**Phone**
Reviewing runs and the register	Desktop

Running a check from the site office defeats most of the point — the photos are the evidence, and they have to be taken where the work is. See Checklists and incidents.

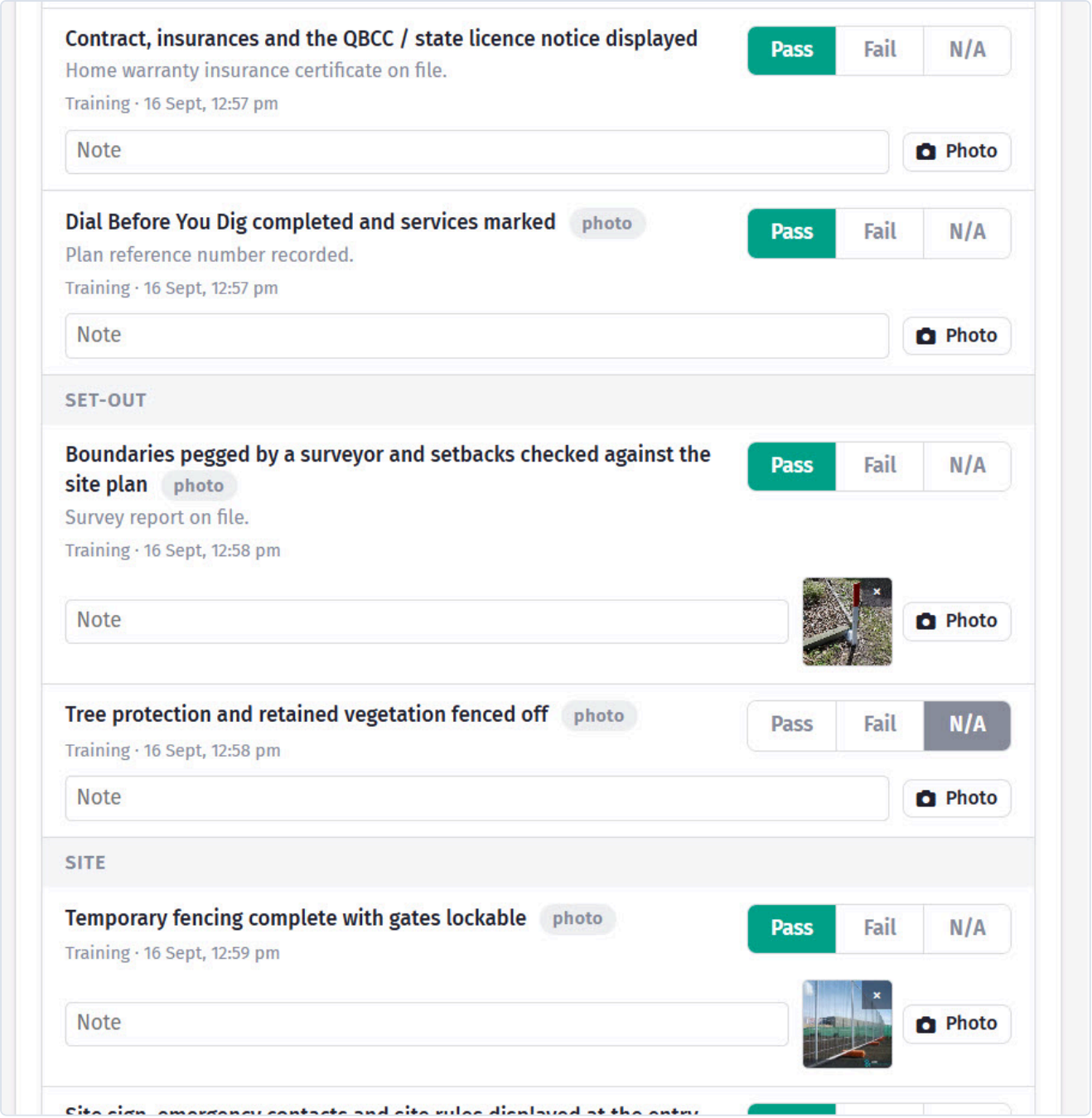
In this section

- Templates
- Runs and sign-off
- Safety incidents

33.2 Templates BUILDER PLAN

The SmarteBuild starter checklists, copying one to make it yours, and writing your own items, sections and answer types.

A template is the list of questions. Runs are made from it; changing it afterwards never touches a run already done.



Write the template once and every job runs the same checks.

Starters and your own

The **Templates** tab shows two lists. **SmarteBuild starters** are ready to run and cannot be edited. **Your templates** are yours to change. **Copy** on a starter puts an editable copy in your list, which is the usual way to begin: copy the frame inspection, add the three things your certifier always asks for, and save.

The fifty-nine starters cover a residential job stage by stage, from the site survey to the keys, plus the safety permits and pre-starts that go with each stage:

Category	Starters
Quality (33)	Existing structure survey (renovation) · Site establishment · Demolition and strip-out · Excavation and footings · Termite management · Pre-slab inspection · Pre-pour (suspended slab, retaining wall, structural concrete) · Structural steel and posts · Frame inspection · Pre-roofing inspection · Roof covering completion · Roofing and external · Brickwork and masonry · Windows and external doors · External cladding and wrap · Lock-up inspection · Electrical rough-in · Plumbing and gas rough-in · Air conditioning and mechanical rough-in · Insulation and pre-sheeting · Pre-lining inspection · Plasterboard and cornice completion · Wet area waterproofing · Tiling inspection · Kitchen and joinery installation · Painting inspection · Carpentry fit-off (second fix) · Electrical and plumbing fit-off · Fix-out and finishes · Driveway, paths and external concrete · Landscaping, fencing and site finish · Final clean · Pre-handover inspection
Handover (4)	Client walk-through and defect list · Practical completion · Keys, documents and warranties handover · Maintenance period inspection
Safety (17)	Site induction and SWMS sign-on · Toolbox talk · Weekly site safety inspection · Scaffold inspection · Ladder and mobile scaffold check · Roof work and edge protection · Working at heights permit · Excavation and trench safety · Electrical safety on site · Hot works permit · Subfloor, roof space and confined access · Manual handling and material delivery · Wet weather and storm response · Heat and UV work plan · Public safety and traffic · Asbestos and hazardous materials · Site emergency preparedness
Pre-start (5)	Daily pre-start · Plant and equipment pre-start · Elevated work platform (EWP) pre-start · Concrete pump and pour pre-start · Crane and lifting pre-start

Two names to know: **Insulation and pre-sheeting** is the last look before plasterboard (what some sites call the pre-sheeting or pre-plaster inspection) and **Pre-lining inspection** is its shorter cousin from the earlier set; run whichever suits your certifier. Scaffold safety is **Scaffold inspection** (the licensed scaffolder's handover and the weekly check) with **Ladder and mobile scaffold check** for the everyday kind.

Adding an item while running a checklist

A template never thinks of everything. On a checklist in progress, **Add an item to this checklist** at the foot of the items adds a question to that run only: name the section, write the question, pick the answer type, mark it photo-required if it is.

If the checklist was started from one of your own templates, tick **Also add to the template** and the next run asks it too. Starters cannot be changed this way; copy the starter first and run from the copy.

An item that has not been answered, noted, photographed or turned into a defect can be removed from the run with the cross beside it.

An inactive template is kept but no longer offered when starting a checklist. Use that rather than deleting a template that has been run.

Writing items

Each item is one question. Fields:

Field	What it does
Section	Groups items under a heading. Items with the same section name sit together, in the order of the first one
Item	The question. Write it so the answer is Pass or Fail: `Bracing installed to the bracing plan, all fixings in` , not `Bracing`
Guidance	How to check it, or what to photograph. Shown under the item while answering
Answer	Pass / Fail / N/A for inspections; Yes / No / N/A for sign-ons and pre-starts; Text or Number for a value, such as a test result or an installer's name
Photo	Tick it and the checklist cannot be completed until that item has a photo (unless it is N/A)

Must be signed to complete on the template makes at least one signature compulsory. Turn it on for anything a third party relies on: inspections, handover, sign-on lists.

Which items should require a photo

The **Photo** tick is the most useful setting on a template, and the most commonly overused.

Require it on anything that **gets covered up** and cannot be re-inspected later without demolition — reinforcement before a pour, waterproofing before tiling, frame tie-downs before linings. Those are the items that would otherwise cost you an argument you cannot win.

Do not require it on everything. Twenty mandatory photos turns a five-minute check into a twenty-minute one, and people start photographing the floor to get past it — which is worse than no photo, because it looks like evidence.

Ordering sections for the walk

Items with the same **Section** name sit together, so sections are effectively the route somebody walks.

Order them by **where the person will be standing**, not by trade. A checklist ordered *Roof, Upper floor, Ground floor, External* is walked once. The same items ordered *Structural, Waterproofing, Services, Finishes* sends them up and down the stairs four times, and the last section gets rushed.

Keeping templates current

Copy an existing template rather than starting from scratch when you need a variant.

Review them when something changes: a code change that adds a requirement, an incident that revealed a gap, a subcontractor who keeps making the same mistake. A checklist that never changes is usually one nobody reads.

Make a template **inactive** rather than deleting it once it has been run — the runs stay, and it stops being offered.

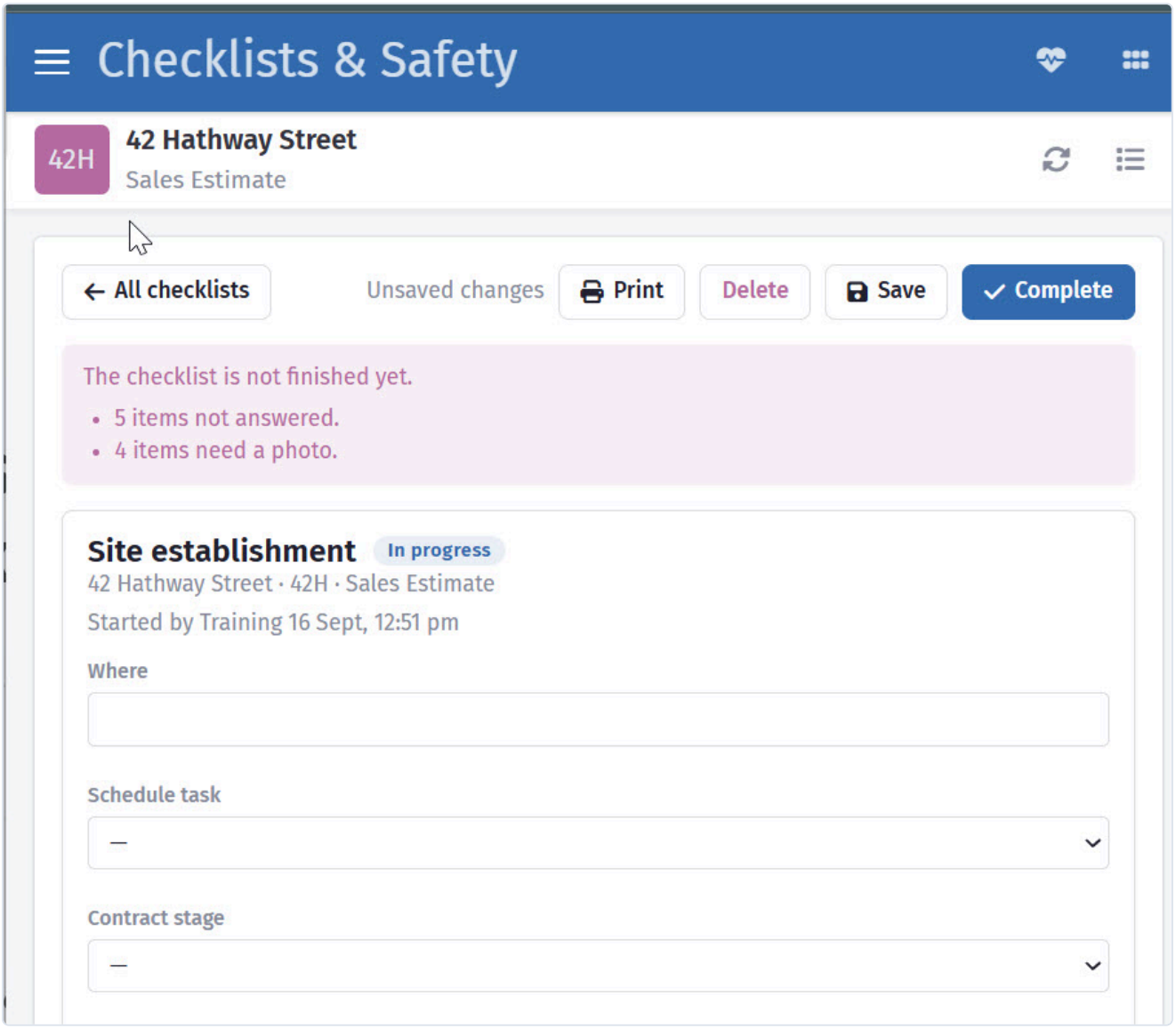
Categories

Quality, Safety, Handover and Pre-start. They group the templates when starting a checklist and filter the list of runs; they do not change how a checklist behaves.

33.3 Runs and sign-off BUILDER PLAN

Starting a run, answering items, capturing photos, closing out with a signature, and what a completed run is worth.

A **run** is one performance of a checklist, on one job, on one day. It is the thing that has evidential value.



Each item ticked, with photos and a signature at the end.

Starting one

Pick the template and the job. The run belongs to that job, and appears in its list of outstanding checks.

Most runs are started and completed on the phone, on site. See Checklists and incidents.

Working through it

Answer each item. Items that **require a photo** will not accept an answer without one, and the run cannot be closed out until they are all answered.

That is deliberate. A half-finished run is not evidence of a check; it is evidence that somebody started one.

Failing an item

A **Fail** is more useful than a pass, and it should not be avoided.

The point of a check is to catch things. A run with everything passed on a job where something was clearly wrong is worse than useless — it is a document that says the problem was inspected and approved.

When something fails, say what and where in the text or the photo. Then deal with it:

- Raise a defect if it needs fixing by a trade
- Raise an incident if it is a safety matter
- Re-run the check once it has been rectified

Re-running is the right move rather than editing the original. Two runs — one failed, one passed, with dates — is the honest record and shows the process worked.

Closing out

Close out collects a signature on the device and finalises the run.

Stored together: the answers, the photos, the signature, and when each was captured. That combination is what makes it a record rather than a form.

> **Sign on site, at the time** — A signature collected in the site office at the moment the check finishes means something. One collected in the ute the next morning is a formality, and if it is ever examined, the timestamps show which it was.

What a closed run is worth

Concretely: it is the document you produce when somebody asks whether a check was done.

- A **client** disputing workmanship that was signed off
- An **insurer** after an incident
- A **regulator** asking about safety process
- A **subcontractor** claiming the work was accepted

In each case the useful thing is not that a check exists in your system. It is that this specific check, on this date, with these photographs, was signed by a named person at a recorded time.

Reviewing runs

The runs list shows what has been done and what is outstanding, filterable by category and status.

Two things to look for:

Outstanding runs on stages already passed. A pre-pour check still open on a slab that was poured last week is a gap in the record that cannot now be filled.

Runs where everything always passes. Consistently perfect results usually mean the checklist is being ticked rather than performed, and that is worth knowing before somebody else discovers it.

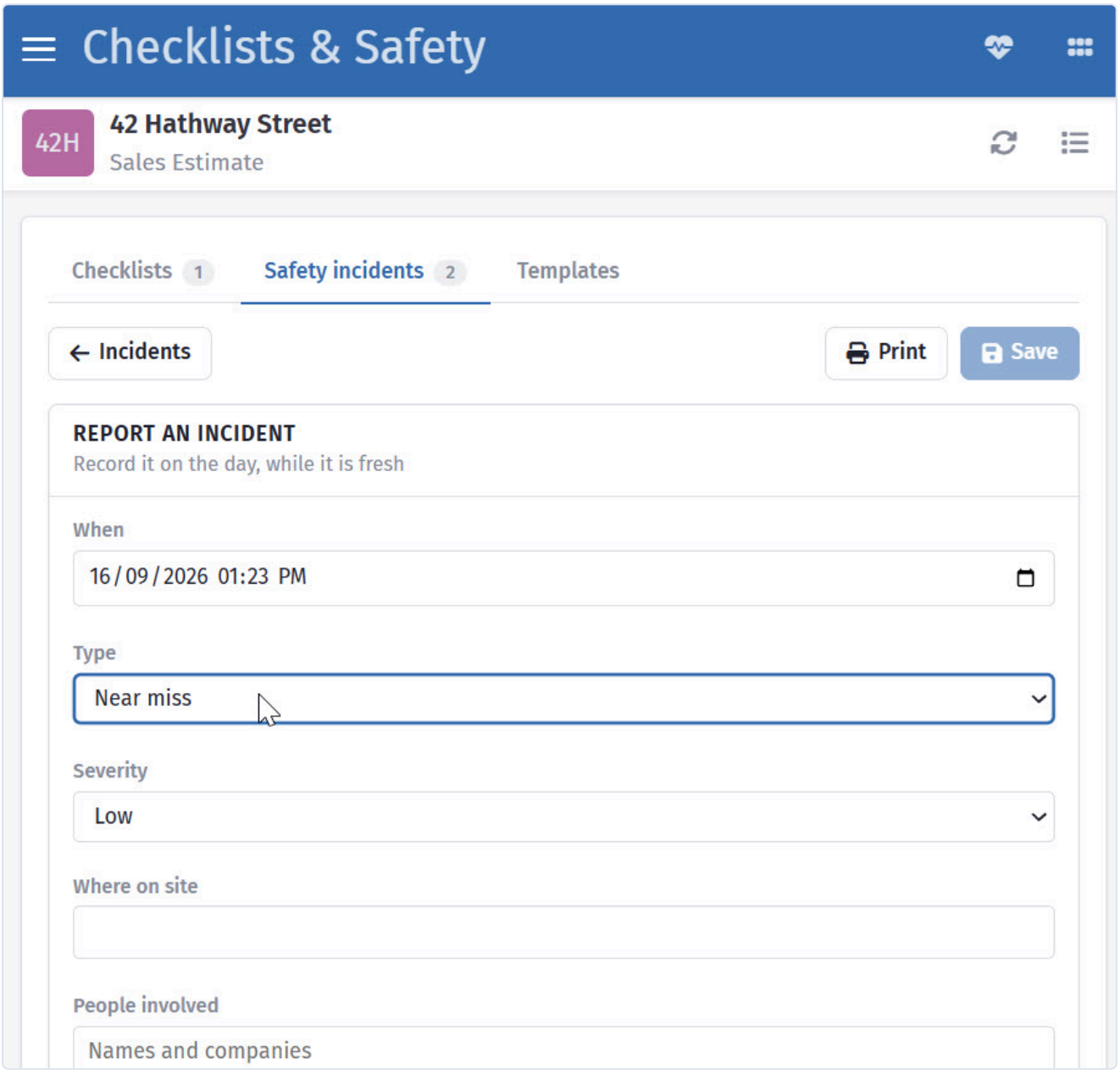
Copying a run's outcome forward

Where a check is repeated — a weekly safety walk — each week is its own run. Do not reuse one and edit the date. The timestamps are the point, and a run whose photos predate its signature by a fortnight is worth less than nothing.

33.4 Safety incidents BUILDER PLAN

Recording injuries, near misses, hazards, damage and environmental events on a job, with photos, actions and close-out.

The **Safety incidents** tab is the job's incident register. It is separate from checklists because an incident is a record of something that happened, not a list of questions.



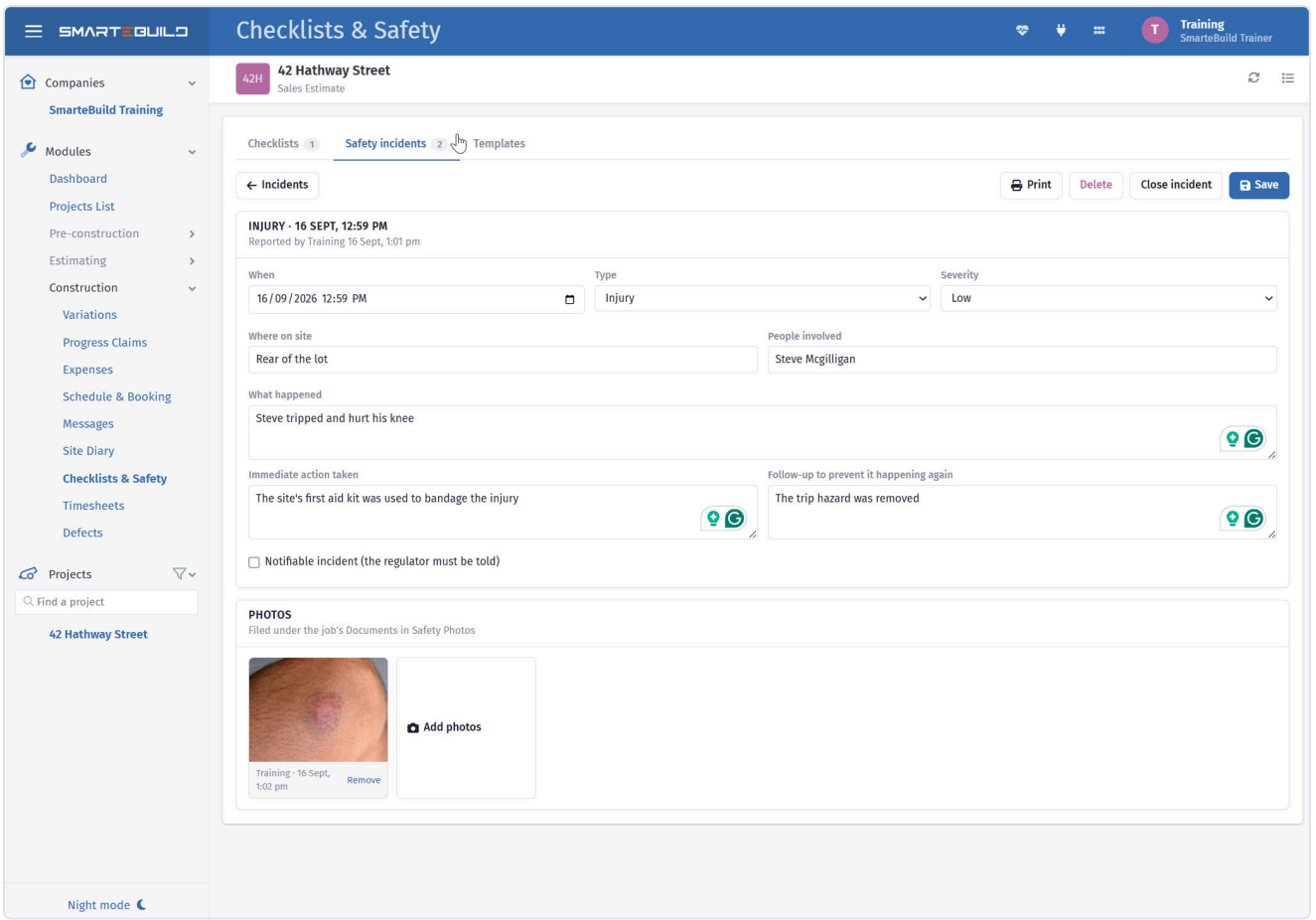
Every incident and near miss, in one register.

Record near misses, not just injuries

The instinct is to record only what caused harm. That is the wrong threshold.

A near miss is the same event as an injury with better luck, and it is free to learn from. A register containing nothing but injuries is one being used to report bad outcomes rather than to prevent them — which is also how it reads to anyone who inspects it.

Reporting one



What happened, who was involved, and what was done about it.

Report incident asks for when, the type (injury, near miss, hazard, property damage, environmental, other), a severity from low to critical, where on site, who was involved, what happened, what was done straight away, and what will be done so it does not happen again. Photos are added once the report is saved.

Tick **Notifiable** when the regulator has to be told. The register flags it in the list so it is not missed.

Write it on the day. A near miss recorded at the time, with a photo, is what turns a close call into a fixed hazard; one remembered on Friday is a story.

Write facts, not conclusions

An incident report is read later by people deciding what happened, sometimes people with a professional interest in your process. Write what you saw and can support:

Avoid	Prefer
`Carpenter was careless`	`Carpenter stepped backwards off the second rung, landed on left ankle`
`Scaffold was unsafe`	`Guard rail missing from the north bay, third lift`
`Nobody was hurt luckily`	`No injury. Load fell approx 2m into an area nobody was working in.`

The left column is an opinion, and an opinion recorded on the day is very hard to walk back later. The right column is a fact.

Keep speculation about cause and fault out of the report itself. Conclusions belong in the close-out, once it has been looked into — by then you may know something that changes them.

Photograph the scene

Before anything is moved or made safe, if it is safe to do so. The scene as it was is not recoverable once it has been tidied, and it is what everybody will want to see.

Closing

Close incident records who closed it and when, once the follow-up is done. Closed incidents drop out of the list until **Show closed** is ticked; nothing is deleted.

A good close-out says three things: what was found, what was done, and what stops it recurring. That third one is the one worth writing — *"toolbox talk held"* is thin; *"edge protection added to all three lifts, and added as a photo-required item on the weekly safety checklist"* is a change.

Feeding it back into checklists

The most useful thing you can do with an incident is turn it into a checklist item.

If something went wrong because nobody checked it, add the check. That is how templates stay live documents rather than a set written once and never revisited, and it closes the loop between the two halves of this module.

Your obligations

What must be reported to a regulator, how quickly, and what records must be kept varies by state and by the nature of the incident. This register helps you keep the record; it does not tell you what the law requires of you.

Notifiable incidents generally have to be reported **immediately**, and the scene often has to be preserved. Know your obligations before you need them, and do not let ticking **Notifiable** here substitute for making that call.

Where the photos go

Under the job's Documents in a **Safety Photos** folder, so they are backed up and findable with everything else on the job.

On the phone

Both checklists and incidents can be done in the mobile app - see The mobile app on site.

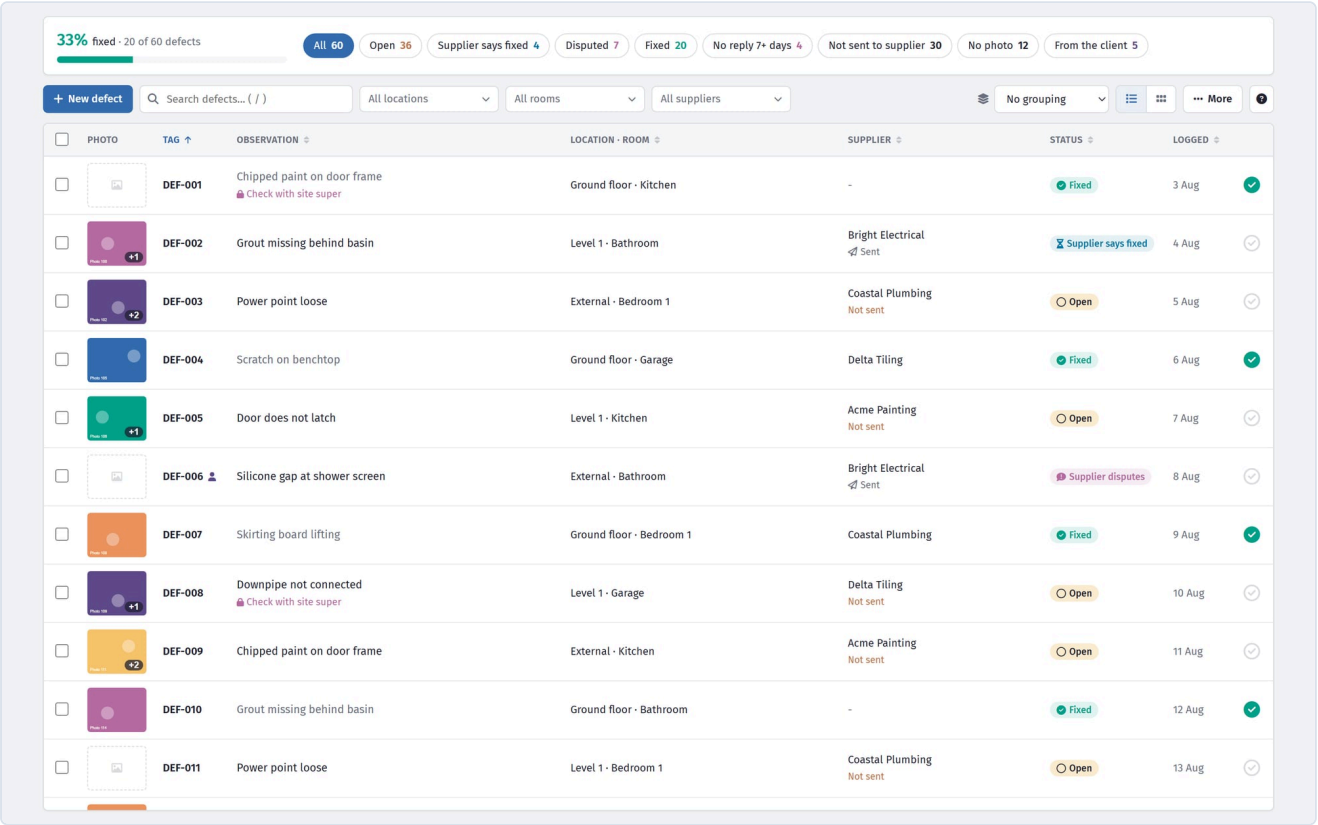
CHAPTER 34

Defects

34.1 Logging defects BUILDER PLAN

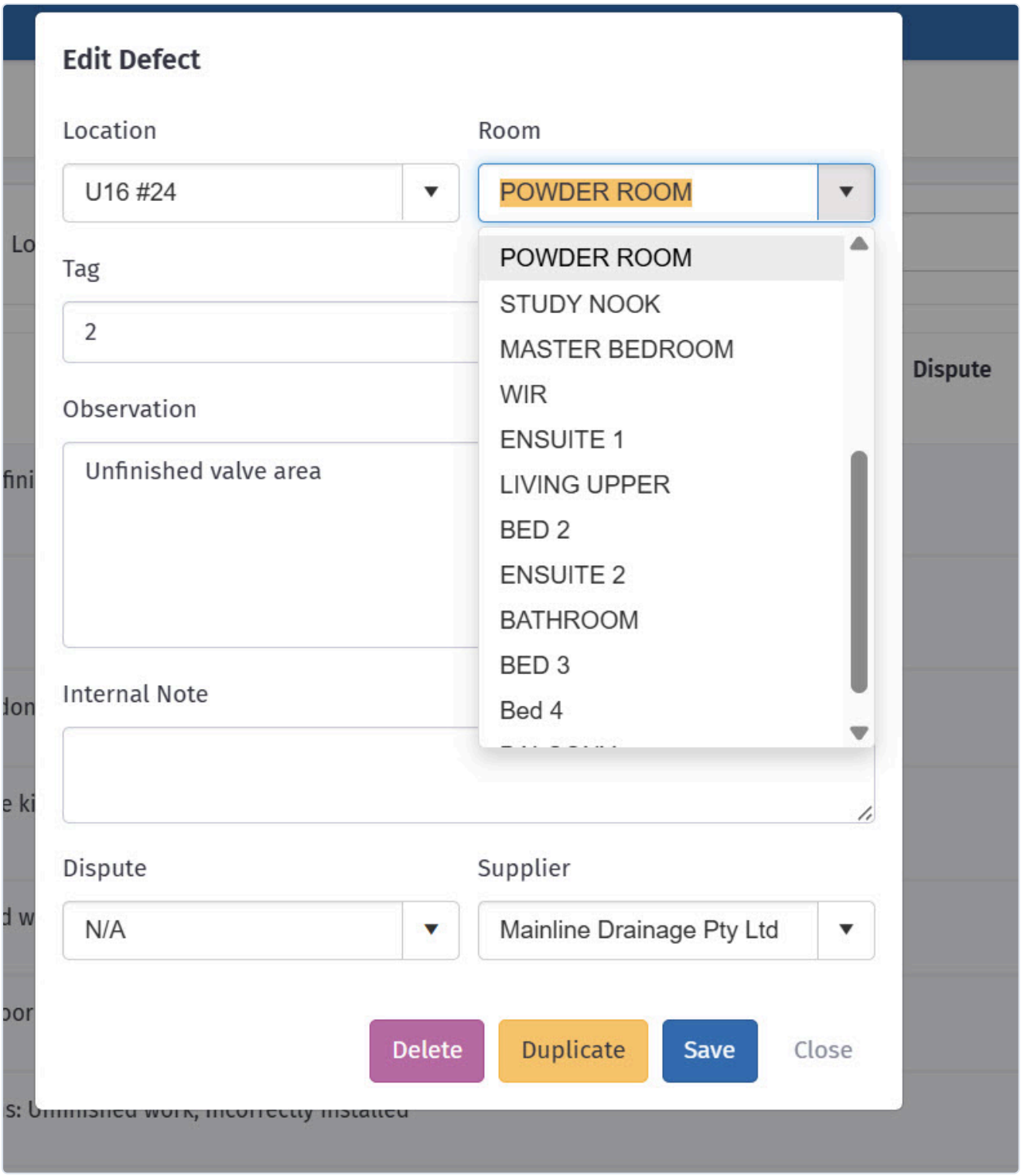
Recording defects by location, what to write in an observation, and importing an inspector's list.

Defects is the punch list — everything to be put right before handover, organised by where it is.



The punch list, from first inspection through to handover.

Locations and rooms



Grouping by room is how a trade actually works through the list.

Type a new location or room straight into the defect's **Location** or **Room** box and choose **Add "…"**; **More → Locations and rooms** renames or deletes them and shows how many defects use each. Defects sit under a location, which is what makes a list of eighty items walkable.

Rooms are shared with Colour Selection on the same estimate, so renaming one renames it there too. Deleting a location or room leaves its defects in place, just without it.

Use the room names from the drawings. `Bed 2` is unambiguous; `back bedroom` is not, and the person fixing it was not at the inspection.

Logging one

Field	What it is
Press **New defect** (or the N key). The defect opens in a panel on the right.	

Field	What it is
Observation	What is wrong - the only field you must fill in
Location / Room	Where it is
Supplier to fix it	Who is responsible for fixing it
Tag	Leave it blank and it numbers itself: DEF-001, DEF-002... (up to 10 characters if you type your own)
Internal note	Your own comments - never shown on the supplier notice
Photos	As many as 12 - you can add them before the first save

Save & add another saves it and starts the next one in the same location, room and supplier, which is how you log a room's worth quickly. Enter saves; Esc closes. The arrows at the top of the panel step to the previous or next defect in the list.

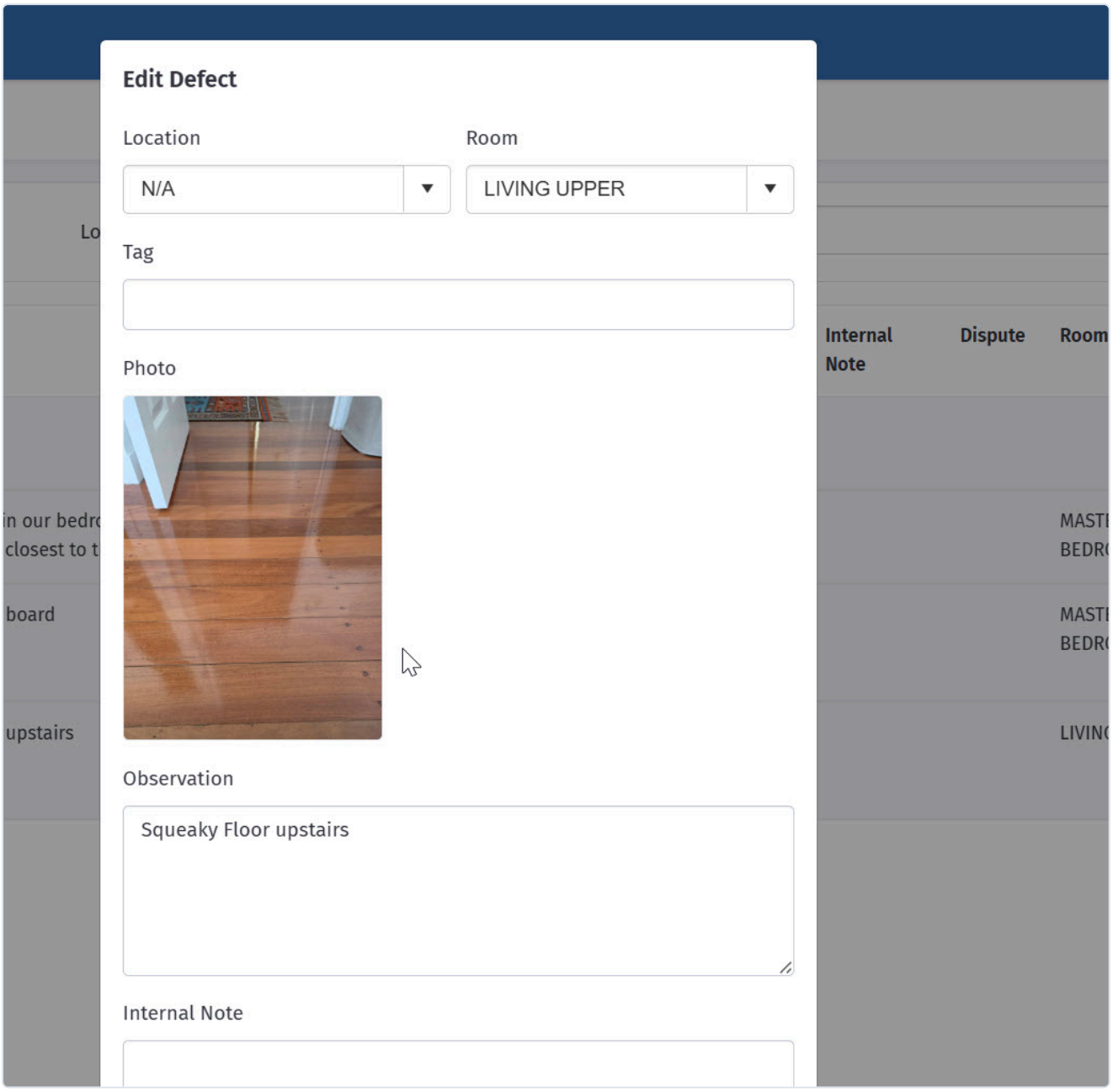
Writing an observation

The person reading it will not be the person who wrote it. Write for them.

Weak	Better
`Paint`	`Paint runs to architrave, door 3 side, approx 300mm`
`Scratch`	`Scratch to benchtop, 150mm, left of sink`
`Door not right`	`Door binds on frame at top hinge, does not latch`
`Tile`	`Chipped tile, 2nd row from floor, wall behind toilet`

Three things make the difference: **what** is wrong, **where** exactly, and **how much**. Without them the trade arrives, cannot find it, and rings you.

Photographs



A photograph settles what a written description argues about.

Attach one to anything that is not immediately obvious from the description.

A defect can carry more than one photograph: a client reporting through the client portal can send up to six. The list shows the first, with a small **+2** style badge when there are more. Open the defect and every photograph is there; click one to see it full size.

To add photographs from the office, open the defect and drag the pictures onto it, paste a screenshot (Ctrl+V), or click **Add photos** (several at once is fine). They are attached straight away, without pressing Save, and filed in Documents in the job's **Defect Photos** folder. The photograph marked **Main** is the one the list, the phone app and the supplier notice show; the star on any other photograph makes it the main one. A defect holds up to 12 photographs of up to 15 MB each.

Click a thumbnail - in the list or in the defect - to see it large; the arrow keys step through the defect's photographs and **Original** opens the file itself. The grid button beside **Group by** shows the whole list as photo cards.

To take one off, open the defect and click the bin on the photograph's corner. It asks first. Removing only unlinks the photograph from the defect: the file stays in Documents, in the **Defect Photos** folder, so a slip is put right by adding it again. If you remove the first photograph, the next one takes its place in the list. A photograph a client sent through the portal disappears from their page too once you remove it.

A photograph removes the argument about whether something is a defect, and it removes the second site visit where the trade could not find it. It is the highest-value thing you can attach.

> **Photograph as you inspect** — Walking the job with a phone and logging as you go beats writing notes and typing them up later — the descriptions are more precise and the photographs actually get taken.

Assigning a supplier

Set the supplier who is responsible. That is what lets you produce one list per trade rather than one list of everything.

A carpenter given eleven carpentry defects fixes them in one visit. The same carpenter given a 60-item list covering every trade reads it, finds their four, and rings to check.

Importing a list

More → **Import from Excel** brings in a list from a spreadsheet. Download the template, or use any sheet whose first row has the headings **Tag**, **Observation** and **Room** (**Location** and **Internal Note** columns are read too). You see every row before anything is saved - which room each matched, and which rows will be skipped (no observation) - and can add rooms that are not on the estimate yet. Rows without a tag get the next DEF number.

This is how an independent inspector's report gets in. They almost always deliver a spreadsheet or a PDF; tidy it into the template and import rather than re-typing 80 items.

Before importing, make sure the locations match the ones already in the job. Otherwise you get `Bedroom 2` and `Bed 2` as separate locations, and the list stops being walkable.

Duplicate

Duplicate (at the foot of an open defect) copies it as a new open defect with the same location, room, words and supplier, and the next DEF number. Photos are not copied - they show the original spot. Useful when the same fault appears in several rooms — the same paint defect in four bedrooms is four defects, each in its own location, and duplicating is faster than typing it four times.

In this section

- Tracking to close-out
- Reports and handover

Defects reported by the client

A client can report a defect from their client portal with the room and photos. It arrives here with no supplier, and the internal note says who reported it. Assign it and chase it like any other; the client sees it as fixed when you tick **Fixed**.

34.2 Tracking to close-out BUILDER PLAN

Marking defects fixed, disputing items that are not defects, and keeping a long list readable as it shrinks.

A defect list is only useful while it is being worked down. These are the tools that keep it moving.

Fixed and disputed

Every defect shows one status:

Status	Means
Open	Still to be fixed
Supplier says fixed	The supplier marked it fixed on the link you emailed them - check it, then tick it
Disputed	You gave it a dispute reason, or the supplier disputes it
Fixed	You ticked it

Fixed — the work has been done. Click the tick at the end of the row (or **Mark as fixed** inside the defect). Click it again to reopen it. The bar at the top of the page shows the percentage fixed.

Disputed — you do not accept it is a defect. Open it and choose a reason under **Disputed because**.

Working the list down

The chips across the top show one kind of defect at a time: **Open**, **Disputed**, **Fixed**, and - once you send supplier notices - **Supplier says fixed**, **No reply 7+ days** and **Not sent to supplier**. Each shows how many there are. Click **Open** and the list is what is left. That is the view to work from — a 90-item list that is 70% complete is dispiriting to read in full and perfectly manageable as 27 remaining items. Click **All** when you need the whole record.

Group by (next to the search box) splits the list by location, room, supplier or status, with a small bar showing how much of each group is fixed. Click a group's heading to collapse or expand it, or use **Collapse all** / **Expand all**; the page remembers which groups you closed. The grid button beside it shows the defects as photo cards - handy on a walk-through with the client. On a phone the list and the photo cards scroll under a fixed toolbar (photos two to a row); the location, room and supplier filters sit behind the funnel button.

No grouping puts the list back to one flat run, and **Clear filters** takes every filter off at once — worth knowing when a list looks suspiciously short and you cannot see why.

To change many at once, tick them (Shift-click ticks a run) and use the bar that appears: **Mark fixed**, **Reopen**, give them a supplier, location or room, or **Delete**.

Disputing

Some items on a client's or inspector's list are not defects. Normal timber movement, something within tolerance, wear from the client's own use, or something that was never in the contract.

Dispute records that position rather than leaving the item open forever.

Write the reason in the note, plainly and without argument:

> *Hairline shrinkage crack to cornice, 0.4mm. Within normal tolerance for the first 12 months. Will be reviewed at the end of the maintenance period.*

> **A disputed item still needs a conversation** — Marking something disputed records your position; it does not resolve it. Tell the client why, at the time, and in the same plain language. A dispute they find out about by reading a report is a dispute that escalates.

Verify before marking fixed

Do not mark a defect fixed because a trade said they had done it.

Check it, or have the supervisor check it. A defect marked fixed and not fixed reappears at the client's final inspection, which is the worst possible moment — it costs you credibility on every other item you marked fixed.

Chasing trades

Send each supplier their list with **Notify supplier** (see supplier notices), or print one list per supplier. **Leave the supplier column out** controls whether the supplier is shown on a printed list, which matters for the client's copy.

A useful cadence in the defects period:

When	Do
Inspection day	Log everything, with photographs
Same day	Send each trade their list
Weekly	Chase what is outstanding
Before the client's re-inspection	Verify everything marked fixed

When the same defect keeps appearing

A trade producing the same defect across several rooms, or across several jobs, is a pattern rather than a series of accidents.

Worth raising with them directly, and worth noting on their supplier record. It is exactly the kind of thing you want to remember at the next tender.

The maintenance period

Most residential contracts carry a defects liability or maintenance period after handover, during which the client can report further defects.

Keep the list open through it. Items reported during the period are logged the same way, and having them in the same place as the handover list means the whole history of the job's defects is in one document.

34.3 Sending defects to a supplier BUILDER PLAN

Email a supplier their open defects with photos and a rectify-by date, see when they opened it, let them mark each one fixed or disputed, and chase what is still open.

A defect list is only useful once the trade who has to fix it has it. **Notify supplier** on the Defects page sends one email to one supplier listing their open defects on the job, with a link to a page where they see each item with its photo and tell you when it is done.

Sending a notice

On **Defects**, click the button. The dialog lists every supplier with open defects on this job, with how many have never been sent and how many are overdue for a chase. Pick the supplier, and:

- **Send to** is filled from the supplier's reps (start typing to pick another, or type an address). You are always CC'd, so a reply comes to you.
- **Rectify by** puts a date in the email. Optional, but a date is what gets a trade out.
- **Message** is your own line above the list: "handover is Friday", "call before you come".
- Tick the defects to include. **Only unsent / to chase** ticks the ones that have never been sent or were sent more than a week ago with no answer - the usual Monday selection.

The email carries the list (tag, where, what, when raised) and a button to **their page**. Photos are on the page rather than attached: a few phone photos would bounce at most mail servers.

A defect with no supplier cannot be sent anywhere; the dialog tells you how many there are. Edit the defect and set the supplier.

What the supplier sees

The link opens a page that needs no login and works on a phone: the job address, your message and the rectify-by date, then each defect with its photo. Under each one:

- **Mark as fixed** - their name, an optional note and an optional photo of the finished work. It shows on your side as *Supplier says fixed* until you check it.
- **Not ours / dispute** - their name and the reason. It shows as *Disputed*.

They can change an answer later. Nothing they do closes the defect: that is yours to do once you have looked.

Knowing what happened

Open a defect and its **Supplier notices** section lists every notice sent for that one item: who sent it, when, whether it was withdrawn, and the supplier's answer — their note, the date, and the photo they took.

To see it the other way round, the filters narrow the whole list: **Not sent to supplier** is the one to run before a site visit, and **Supplier says fixed** is the queue waiting on you to check. Group by supplier to see one trade's position in one place.

Notices sent & replies, on the ⋮ menu, opens **every notice sent on the job**: who, when, whether the link has been opened (and when), how many items they say are fixed, disputed, closed or still open. Open one to see the items with their responses and photos, and:

- **Accept & close** on an item the supplier says is fixed, once you have checked it. That ticks the defect as Fixed and records who accepted it.
- **Send reminder** re-sends the same link listing only what is still open. Each reminder is counted and dated.
- **Open their page** / **Copy link** to see what they see, or to text the link to a foreman who does not read email.
- **Withdraw link** if a notice went to the wrong person. The defects keep their history.

From the phone

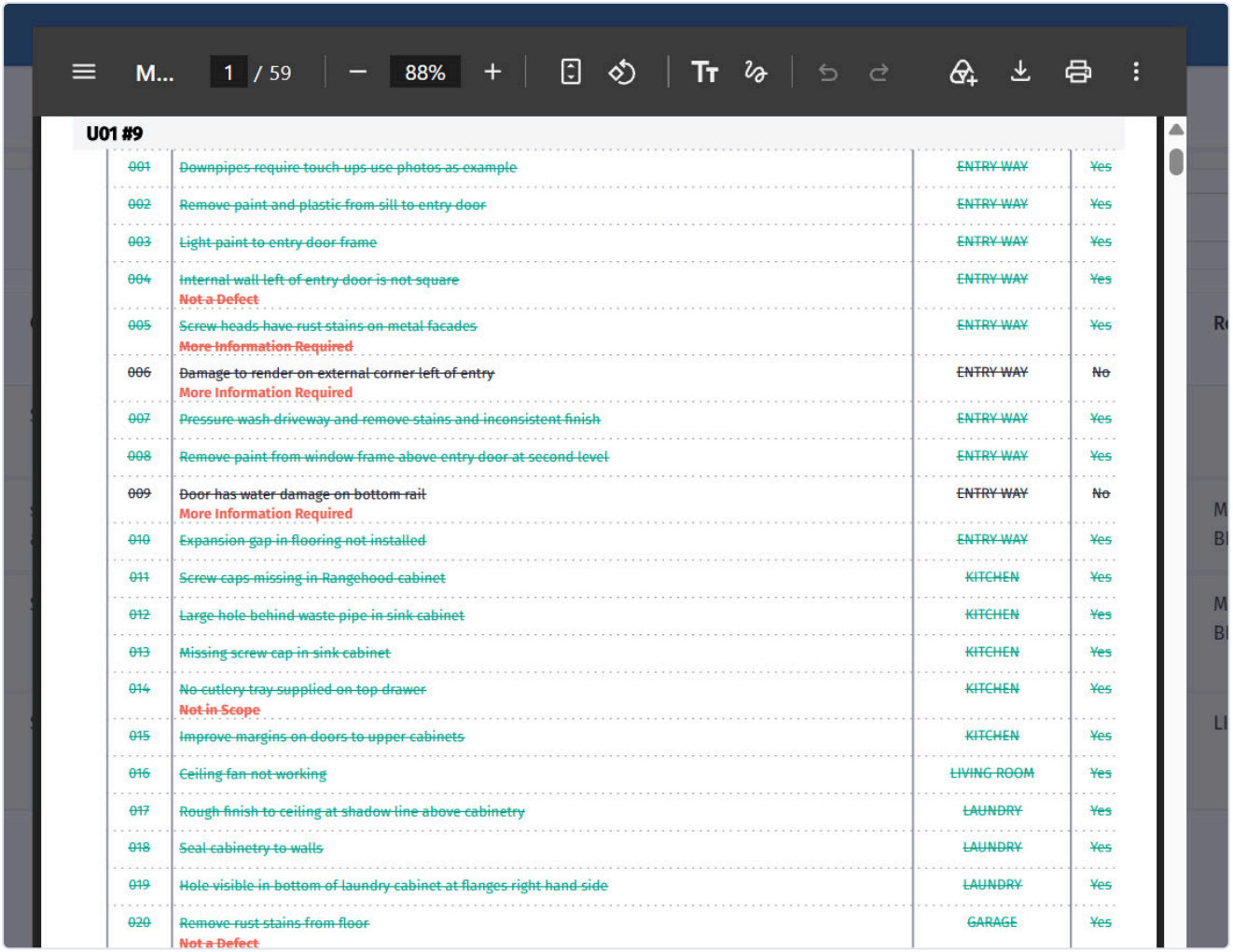
The mobile app can send a notice, see the notices on a job and send a reminder from site - useful when the trade is standing next to you. See The mobile app on site.

> **Where the email comes from** — Notices leave from the same mailbox as purchase orders, shown as "Defects - *your company*", with the wording from the *Defect Notice* email template. If a notice fails to send, nothing is recorded: a defect only shows *Sent* when the supplier actually has the email.

34.4 Reports and handover BUILDER PLAN

Producing defect lists for trades and for the client, the print options, and what handover needs.

The same defect list serves three audiences. The print options are how you produce the right version of it.



U01 #9

001	Downpipes require touch ups use photos as example	ENTRY WAY	Yes
002	Remove paint and plastic from sill to entry door	ENTRY WAY	Yes
003	Light paint to entry door frame	ENTRY WAY	Yes
004	Internal wall left of entry door is not square Not a Defect	ENTRY WAY	Yes
005	Screw heads have rust stains on metal facades More Information Required	ENTRY WAY	Yes
006	Damage to render on external corner left of entry More Information Required	ENTRY WAY	No
007	Pressure wash driveway and remove stains and inconsistent finish	ENTRY WAY	Yes
008	Remove paint from window frame above entry door at second level	ENTRY WAY	Yes
009	Door has water damage on bottom rail More Information Required	ENTRY WAY	No
010	Expansion gap in flooring not installed	ENTRY WAY	Yes
011	Screw caps missing in Rangehood cabinet	KITCHEN	Yes
012	Large hole behind waste pipe in sink cabinet	KITCHEN	Yes
013	Missing screw cap in sink cabinet	KITCHEN	Yes
014	No cutlery tray supplied on top drawer Not in Scope	KITCHEN	Yes
015	Improve margins on doors to upper cabinets	KITCHEN	Yes
016	Ceiling fan not working	LIVING ROOM	Yes
017	Rough finish to ceiling at shadow line above cabinetry	LAUNDRY	Yes
018	Seal cabinetry to walls	LAUNDRY	Yes
019	Hole visible in bottom of laundry cabinet at flanges right hand side	LAUNDRY	Yes
020	Remove rust stains from floor Not a Defect	GARAGE	Yes

What the client signs off at handover.

Print options

Open **More → Print or export**. It starts on the location and supplier the list is filtered to, so a filtered list prints as you see it.

Option	What it does
Full report / Summary / Excel	The whole detail with photographs, one line per defect, or a spreadsheet
Location and **Supplier**	Print one location, one trade, or everything
Fixed defects	Crossed out, shown, or left out
Disputed defects	Crossed out, shown, or left out
Leave the supplier column out	Removes who is responsible
Start each location on a new page	Starts each location on its own page

The PDF opens in the window; **Open in a new tab** prints or saves it.

For a trade

One list, their items only, with locations and photographs.

Tick **Start each location on a new page**. A carpenter working through a house can take one page per room rather than cross-referencing a single long list, and can tick items off as they go.

Include fixed items? No. They want what is outstanding.

For the client

The full list, with fixed items shown as fixed and disputed items shown as disputed.

Leave the supplier column out — yes. Which subcontractor caused a defect is your business, not the client's, and naming them invites the client to deal with them directly.

Include everything else. A client seeing 63 of 78 items marked fixed can see the job is being worked through; one shown only the outstanding 15 has no sense of progress.

For handover

At handover the client wants two things: that the list has been dealt with, and a record of anything outstanding.

Produce:

1. **The full list**, showing fixed, outstanding and disputed.
2. **A summary** — the counts, so the position is clear at a glance.
3. **Photographs** of anything disputed, supporting your position.

Attach the whole thing to the project in Documents. It belongs with the handover pack, and it is one of the first things anyone looks for if something comes up later.

> **Hand over the list even when it is complete** — A signed-off defect list showing every item fixed is a valuable document. It is the record that the job was inspected, the issues were found, and they were resolved — which is exactly what you want if something is raised in twelve months' time.

The summary report

Summary gives the position without the detail: counts by location, by trade, and by status.

Useful for a weekly update to the client during the defects period, and for your own sense of whether the list is actually shrinking.

Excel export

Excel downloads the list - with each defect's status, dispute reason, supplier notice and photo count - for sorting, filtering, or handing to someone who wants to work in a spreadsheet.

Useful when an independent inspector wants the list back in their own format, or when you want to analyse defects across several jobs to find the patterns worth acting on.

What the client signs

At handover, the client signs off the defect list as part of accepting the works.

Make sure what they sign matches what they can see: every fixed item genuinely fixed, every disputed item explained, and every outstanding item with a date against it. A list signed on the understanding that four items remain, with dates, is a clean handover. One signed as complete when it is not is a problem deferred.

CHAPTER 35

Messages

35.1 Messages BUILDER PLAN

Team chat attached to jobs - channels, groups and direct messages, what replaced Feeds, and what belongs here rather than in a text message.

Messages is team chat, attached to your jobs. It replaces the old **Feeds** module.

What happened to Feeds

Feeds has been switched off and its posts **imported into Messages** — you will see older material marked *"Imported from Feeds"*.

Nothing was lost. The conversation moved somewhere that works on a phone, supports groups and direct messages, and sends push notifications, which is what a site conversation actually needs.

What it is competing with

Be clear-eyed about this: it is competing with the group text message, and that is a high bar. A text message is already on everybody's phone and needs no login.

What it does that a group chat cannot:

It is attached to the job. A question about 18 Beach Road lives with 18 Beach Road, not in a thread that also contains the school run.

It survives people. When a supervisor leaves, their phone leaves with them. The job's conversation stays.

It is searchable. Across messages, people and files — so "what did the engineer say about the footing depth?" has an answer.

It carries files. A photo sent to a thread stays attached to the job and is still there in a year.

How conversations are organised

Kind	For
Job channels	Everyone working on a particular job
Groups	A set of people — `Frame crew`, `Site managers`
Direct messages	One person — a separate conversation for each job, plus a general one

New chat starts any of them. A group or a direct message is either **about a job** or has **no job** — a company-wide group, or a general chat with a colleague, does not belong to one project. The heading of every conversation says which job it is about.

Threads can be **pinned** to keep them at the top, or **muted** if you do not need every message.

Getting a team to actually use it

Chat tools fail the same way everywhere: a few people post, most do not, and it becomes a channel nobody trusts to be current. What works:

Decide what belongs there and say so. "Site instructions and job questions go in Messages" is a rule people can follow. "Use Messages more" is not.

Put the things people need in it. If it is where site instructions appear, people read it. If it duplicates a group text, they read the text.

Reply in the thread, not by text. A conversation that ends in a phone call has lost the part that mattered.

Make sure push notifications work on everybody's phone. A chat you have to remember to open is a chat nobody uses. See Messages on mobile.

What belongs here — and what does not

Messages is for **the conversation**. The formal record belongs where it belongs:

Thing	Where it goes
A change to the contract	A variation
A delay	The site diary
Something needing fixing	A defect
A commitment to a supplier	A purchase order
A safety event	An incident
The discussion around any of these	**Messages**

> **A decision agreed in chat is not a variation** — The most expensive mistake available here is treating a chat message as a record of agreement. A client saying "yes go ahead" in a message is useful context, but it will not get you paid. Raise the variation.

In this section

- Channels, groups and files

35.2 Channels, groups and files BUILDER PLAN

Starting a conversation, linking it to a job, sharing files, searching, and who can see what.

Starting a conversation

New chat creates a group or a direct message.

Give a group a name people will recognise — `Frame crew`, `18 Beach Rd — client`, `Site managers`. **Search your team** finds the people to add.

About sets what the conversation is about: one of your jobs, or **No job (general conversation)**. This applies to direct messages as well as groups. Started from **This job**, it is already set to the job you are in.

Edit group changes the name and membership later.

One conversation per person, per job

A direct message is kept separately for each job. If you message Dean about 18 Beach Road and later about 4 Hill Street, those are two conversations, each listed under its own job, so a question about one job is never buried among messages about another.

Choose **No job** for anything that is not about a particular job — leave, a tool that needs replacing, a catch-up. That is your general conversation with that person, and there is one of those too.

Starting a conversation you already have reopens it: the same person and the same job (or no job) always lead back to the same place.

The **heading** of every conversation shows the job it is about, or **No job · general conversation**. In **All**, each row carries the job's name (or **No job**), which is how you tell two conversations with the same person apart.

Linked to a job

A linked conversation appears with the job, which is what makes it findable a year later by someone who was not part of it.

It also means the right people are obvious. A channel on 18 Beach Road is for people working on 18 Beach Road, rather than a group somebody assembled once and never updated.

Files and photos

Attach a file or photo, or drag one onto the conversation.

Attachments stay with the job. A photo of the flashing detail sent in March is still there in October when somebody asks how it was done — which is not true of the same photo in a text message.

People and files shows who is in a conversation and what has been shared in it, which is usually the fastest way back to a document somebody sent.

> **Say where the photo was taken** — *"Flashing at the rear parapet, west end"* is answerable. *"Is this right?"* produces three replies working out what it is a photo of. It costs six words.

Searching

Search messages, people and files covers all three.

This is the feature that justifies the module over a group chat. Questions like *"what did the engineer say about the footing depth?"* or *"who did we use for the waterproofing on Ridge Street?"* have answers, and finding them takes seconds rather than scrolling.

Search is also why it is worth writing slightly more than you would in a text. A message that says *"Barwon confirmed the pour for Thursday 7am"* is findable; *"yep all good"* is not.

Pinning and muting

Pin keeps a conversation at the top — useful for the job you are on this week.

Mute stops notifications from one you do not need to follow minute by minute. It does not leave the conversation; you still see it when you look.

Muting is the pressure valve. Without it, people leave noisy channels entirely and then miss the message that mattered.

Who can see what

A conversation is visible to the people in it. For a job-linked channel, that follows who is working on the job.

A conversation about a job is only for people on that job. This covers the job's groups and direct messages as well as its General chat:

- In **New chat**, once a job is chosen, the people list shows only those who have access to it. A line under the list says how many of your team are not on the job.
- The same goes for **Edit group** on a job's group.
- Someone who is taken off a job stops seeing that job's conversations. Put them back on the job and the conversations, with their history, are there again.

To bring someone into a job's conversation, give them access to the job first — see People, in Project settings. To talk to someone who is not on the job, choose **No job**: a general conversation has no such limit.

Before posting anything commercial — margin, a subcontractor's performance, a view about the client — check who is in the conversation. Project access is often broader than people assume: consultants, client representatives and subcontractor supervisors are sometimes given access so they can see documents or the schedule.

If in doubt, use a direct message or a named group rather than the job channel.

Message removed

A message can be removed, and shows as **Message removed** rather than vanishing.

Only the person who wrote a message can remove it, and only within an hour of sending it. Nobody else can, not even an administrator, so what a colleague or a client said stays on the record.

That is deliberate — a conversation with silent gaps is not a record. Removing a message deals with the mistake without pretending it never happened.

Imported from Feeds

Older material carried over from the Feeds module is marked **Imported from Feeds**.

It is read-only history. Everything new happens in Messages.

35.3 Messages on the phone BUILDER PLAN

The same chats in the mobile app, with the camera a tap away and a notification when something arrives.

The mobile app carries the same chats as the desktop. What is written on site is what the office reads, and the other way round.

Chats

Tap **Messages** on the project's Home screen for that job's chats, or switch to **All jobs** at the top for every chat across your jobs. The Home tile shows your unread count for the job; a chat's badge turns orange when you were mentioned. The bell in a chat's header mutes it; the info button lists who is in it and, for a group, lets you leave.

Writing

Type and send. The camera button takes a photo or picks one from the library and sends it straight from the site; `#` links a defect, purchase order or variation to the message. `@` mentions someone (the names pop up as you type), and the microphone in the message box is the app's talk-to-write dictation, so a long message does not have to be typed.

Long-press a message to reply to it, or to delete your own within an hour. Scroll up to load older messages.

Notifications

The phone tells you when a message arrives in a chat you are in, unless you muted that chat. A mention always gets through. Tap the notification to open the chat. Nothing is sent for your own messages, and nothing while you have that chat open.

Notifications need the app's permission the first time; if you said no, the phone's settings for SmarteBuild turn them back on.

New group

New chat on the chat list starts a direct message with one person, or a group: a name and the people. **About this job** is on by default, which keeps the chat with the job you are in; turn it off for a general conversation that is not about any one job.

A chat about a job is only for people on that job, so with **About this job** on, the list shows only them. Turn it off to reach someone who is not on the job.

You have a separate conversation with a person for each job, plus a general one. Starting a direct message you already have — the same person and the same job — reopens it. The strip at the top of a chat names the job it is about, or says **No job · general conversation**.

> **Note** — On the phone, separate conversations per job arrive with app version 1.2.5. Until you have it, a direct message started on the phone is always the general one. Conversations started on the website show on the phone under the right job either way.

CHAPTER 36

The client portal

36.1 Client portal BUILDER PLAN

One private page per client per job - shared documents, colour selections, variations to approve, progress claims, photos from site and a message thread with you. No login.

The **client portal** is a web page for your client about their job. You give them one link; on it they see what you have chosen to share, approve variations, download their progress claims, look at photos from site and send you a message. There is no login, no app and no password. The link itself is the key, the same way shared colour schedules and call-up confirmations work.

Give your client one address instead of a stream of emails, and the "can you send me the contract again?" calls stop.

What the client sees

The page has seven tabs. Each one shows only what you have shared or what belongs to that client.

Tab	What is on it
Home	A welcome line you write, your contact details, and what is new: the latest documents, photos, variations, claims and messages
Documents	Every file in the job's **Client Documents** folder, plus any other job file you ticked as shared. Open or download
Selections	A button into their colour selections page, if you have shared one, with how far through they are
Variations	Every variation sent to them with its status, opening the same approve / decline page as before, and a form to **ask for a change**
Claims	Their progress claims with the PDF, whether each is paid, part paid or awaiting payment, and the running totals: contract, claimed, paid, outstanding
Photos	Site-diary photos shared with the client, grouped by day - either every photo (the job's *share all photos* switch) or only the ones ticked
Schedule	Only when you switch it on for the job: the stages and tasks with their dates and percent complete, a today line, and what is running late. Never cost, suppliers, call-ups or notes
Defects	On unless you switch it off for the job: the client reports something that is not right, with the room and up to six photos, and follows whether it is fixed. They see only what was reported through the portal. Never your own defects, the supplier, a dispute or your internal note
Messages	A chat with your team. What they write lands in Messages as a *Client* chat on the job, and on the team's phones

Money on the page is only ever the client's own figures: their claims and their variations. Nothing about cost or margin leaves the server.

Setting a client up

Client links are managed on **Project Details**, in the **Client portal** card under the clients list. Each client of the project gets their own link for the estimate you have selected.

1. Add the client (name and **email**) under **Clients** if they are not there yet. Their link is made for the selected estimate the moment you add them, so they appear in the **Client portal** card straight away, ready to send. Nothing is emailed yet.
2. In the **Client portal** card press **Invite**. Write a personal line for the email if you like, and a **welcome line** that sits at the top of their page. Press **Send invitation**. The email goes (you are copied in), and the card shows when it was sent.
3. Or press the link button to copy the link and send it by text or however you prefer. A client added before links were made automatically - or one you want on a different estimate - shows **Make link** instead; press it first.

The card also shows when the client first opened the page and how many times, so you know whether the invitation landed.

Revoke stops a link working immediately; anyone opening it sees "this link is no longer valid". **New link** afterwards issues a fresh address. Deleting a client from the project revokes their link too.

> **The welcome line is yours** — "Welcome to your job page. Frame goes up next week; photos will appear here as we go" is worth more than a generic greeting. Change it whenever the job changes stage - it is on the same invite dialog, and saving it does not need another email.

What the old variation portal became

Before September 2026 the same link opened a page that listed only variations (`ClientVariation.aspx?p=`). Those addresses still work: they redirect to the new page. The per-variation links (`?t=`) are unchanged and are what the Variations tab opens.

In this section

- Sharing documents, photos and selections
- Client approval of a variation

Selections in the portal

The **Selections** tab is the client's selections schedule, shown inside the portal as soon as the job has one. The client makes and confirms choices there exactly as they would through a separate selections link, each confirmation lands in the chat, and the home page shows the latest selection activity. There is nothing extra to set up: the portal link is the key.

36.2 Sharing documents, photos and selections BUILDER PLAN

What reaches the client's page and how to control it - the Client Documents folder, the share tick on any file, Share with client on diary photos, the colour-selection share link, and the client chat.

Nothing reaches the client's page unless you put it there. Four things feed it.

Documents

Two ways to share a file, both on the same job:

- **Put it in the Client Documents folder.** Making a client link creates a top-level folder called **Client Documents** under the job's Documents. Everything in it, and in any folder inside it, is on the client's page. This is the habit to build: contract, drawings for construction, certificates, warranties.
- **Tick any other file.** In the **Client portal** card on Project Details, press **choose** next to the shared-document count. Every live file on the job is listed with a tick box; files in Client Documents are ticked and locked. Tick a file anywhere else and it is shared without moving it. The same tick is in Documents: open the file and click **Share** - see Sharing documents, which also covers sending a secure link to a subcontractor or supplier.

A file marked obsolete in Documents disappears from the client's page. Files the client sends you through the Messages tab are filed under the job's **Messages** folder, not Client Documents, so they never show back to the client as a "shared document".

Photos from site

Every photo on a site diary day has a **Share with client** tick under it. Tick it and the photo is on the client's Photos tab, grouped by the diary day, with its caption. Untick to take it back.

Nothing is shared by default. A photo of a defect, a wrong delivery or a subcontractor's mess stays in the diary where it belongs; the client sees the slab, the frame and the roof going on.

If ticking each photo is more than you want to do, the Client portal card has a **Share all site-diary photos by default** switch for the job. Turning it on shares every live photo already in the diary and every photo taken from then on, from the desktop or the phone. The tick on each photo still works the other way: untick one to hide it. Turning the switch off stops new photos being shared; the ones already shared stay until you untick them.

On the phone the same tick is on the photo in the diary screen.

The schedule

Off unless you turn it on. The Client portal card has a **Share the schedule** switch for the job. With it on, the client gets a **Schedule** tab: each stage with its tasks, planned start and finish dates, percent complete, milestones, a "today" line, and a *running late* flag on anything past its finish date without being done. The overall percent is weighted by task duration.

What the client never sees, switch or no switch: task cost, the supplier or subcontractor on a task, call-ups and their status, delays, notes, float and the critical path. The tab reads the same tasks as your Gantt, so it moves as your plan moves - and the page says so to the client. If you re-plan often, tell them what changed their move-in rather than letting them discover it on the tab.

Colour selections

The Selections tab uses the job's existing share link. If you have shared the colour schedule, the client's page shows how many selections are made and a button that opens it. If you have not, the tab says so and nothing else.

When a selection is linked to an item on the job's procurement list, the client sees **Please choose by** and the date the choice is needed by, so it can be ordered in time. The date follows the schedule.

Variations and claims

These need no sharing step. A variation appears on the client's page once it has been **sent** to that client (or they requested it); a progress claim appears once it exists on the job for that client. The Claims tab works out **paid / part paid / awaiting payment** from the payments you record against the job, so record payments as they arrive or the client will see a claim as outstanding after they have paid it.

The client chat

The Messages tab is a chat between the client and your team. It is a Messages conversation of a special kind - **Client**

- on the job:
- everyone with access to the job sees it in Messages on the desktop and the phone, like the job's General chat, and gets a notification when the client writes;
- the client's messages carry the client's name; yours carry yours;
- the client can send a photo or a file, which is stored on the job;
- it cannot be left, only muted; and the client only ever sees this one conversation, never the General chat or any group.

> **A message is not an approval** — "Yes, go ahead" in the client chat is a conversation, not a signed variation. Send the variation; the client approves it on the Variations tab with a typed name, and that is the record.

Letting the client report defects

The **Defects** tab on the client's page lets them tell you about something that is not right: a sentence on what is wrong, the room, and up to six photos. It is **on by default**; untick **Let the client report defects** on the project's Client portal card to hide it for a job, for example until handover.

What happens when a client reports one:

- It lands in your **Defects** list for the job like any other, with the next DEF number, the room, and the first photo. The internal note says which client reported it and when. If they sent several photos, the list shows the first with a **+2** style badge; open the defect to see them all. The files themselves are in Documents, in the **Defect Photos** folder.
- **No supplier is set, and the client is never asked for one.** Who fixes it is your call: assign the supplier and send a notice as you would for any defect.
- You are told straight away in **Messages**, in the job's client chat, with a link that opens the defect. That is what raises the unread badge and the phone notification.

What the client sees afterwards is deliberately narrow: only the defects reported through the portal on their job (their own and a co-owner's), each marked *With your builder* until you tick it **Fixed**. They never see defects you logged yourself, the supplier, a dispute, or your internal note.

Each of those defects shows its photos to the client, and it is the same set you see: the ones they sent, plus any you add on the Defects page or from the phone app (a photo of the finished repair, for example). A photo you take off the defect disappears from their page too. Keep that in mind before adding a photo you would not want the client to see.

The rooms offered to the client are the job's rooms, the same list Colour Selection uses. A job with no rooms set up simply has no room question.

PART VI

Beyond the desktop

The phone in your pocket, the systems you already run, and the reports.

37 Beyond the desktop
38 The mobile app
39 Integrations
40 Reports

CHAPTER 37

Beyond the desktop

The mobile app, Xero and Office 365 integrations, and the report library.

SmarteBuild is mostly used at a desk, but not entirely. This section covers the parts that reach outside it.

The mobile app

For site. Documents, purchase orders and tasks, on a phone, so the person on site can look something up without ringing the office.

It is deliberately not the whole system. Estimating happens at a desk; the app covers what you need standing in a half-built house.

Get it: SmarteBuild on Google Play for Android phones and tablets (Australia and New Zealand). The iPhone and iPad version is on its way.

- Installing and signing in
- What you can do on site
- Working with poor reception

Integrations

Connections to the other systems your business runs on.

Xero takes purchase orders and expenses into your accounting system, with suppliers, jobs and accounts mapped across, so the same invoice is not entered twice.

Office 365 and Google handle sending — so orders, tenders and claims go out from your own mailbox and land in your own sent items.

- Xero
- Office 365 and Outlook
- Gmail and Google

Reports

Turning what is in the system into documents — for clients, subcontractors, lenders and your own office.

- The report library
- Exporting and sharing

Reports specific to the Bill of Quantities are covered in BOQ reports.

CHAPTER 38

The mobile app

38.1 Installing and signing in

Getting the SmarteBuild app onto a phone, signing in, and choosing which job you are working on.

The SmarteBuild mobile app gives site staff access to documents, purchase orders and tasks on a phone.

Getting it

Android phones and tablets: install **SmarteBuild** from Google Play, or search the Play Store for "SmarteBuild". It needs Android 7 or later and is listed in Australia and New Zealand.

iPhone and iPad: the App Store version is on its way. Until then, iPhone users can use SmarteBuild in the phone's browser at app.smartebuild.com.au.

The app is included in the **Builder** and **Enterprise** plans. What each person sees in it depends on the modules and jobs their account has been given — see Before someone's first day on site.

Google Play and the Google Play logo are trademarks of Google LLC.

Which version is installed

The version and build number are printed at the foot of the sign-in screen ("App version 1.2.4 (14)") and under the tiles on the Home screen. If support asks what you are running, or an update does not seem to have arrived, that line is the answer — the number in brackets goes up with every release.

Signing in

Use the **same email address and password** as the desktop application. There is no separate mobile account to create.

If sign-in fails:

Symptom	Usually
Password rejected	Wrong password — reset it on the desktop first
"No access" after signing in	The user has no module or project access
Signs in, sees nothing	No project permissions
Cannot connect at all	Reception, or the device is offline

The middle two are the common ones for a new starter, and both are fixed on the desktop rather than on the phone. See Roles and access.

> **One account per person, on mobile too** — Site staff sharing a login is even more tempting on phones than on desktops, and just as damaging — every action recorded against a shared account is attributable to nobody. Give each person their own.

Choosing a project

After signing in you pick which job you are on. The list shows the projects your account has access to.

Everything you then see — documents, orders, tasks — is that job's.

If a job you expect is missing, it is project permissions rather than the app. An office administrator can grant them in seconds.

Before someone's first day on site

Worth doing at the desk rather than in a driveway with one bar of signal:

1. Create their user account.
2. Give them **module access** to Documents, Purchase Orders and Schedule.
3. Give them **project permissions** for their jobs.
4. Install the app and sign in **on wi-fi**.
5. Open each of their jobs once, so the app has them.

Five minutes, and it removes the most common reason a supervisor gives up on the app in the first week.

Staying signed in

The app keeps you signed in between uses. You should not have to enter a password every morning.

If it does keep asking, the device is probably clearing app data — check its battery optimisation and storage settings, which on some Android phones will quietly evict apps that are not used daily.

Security on a phone

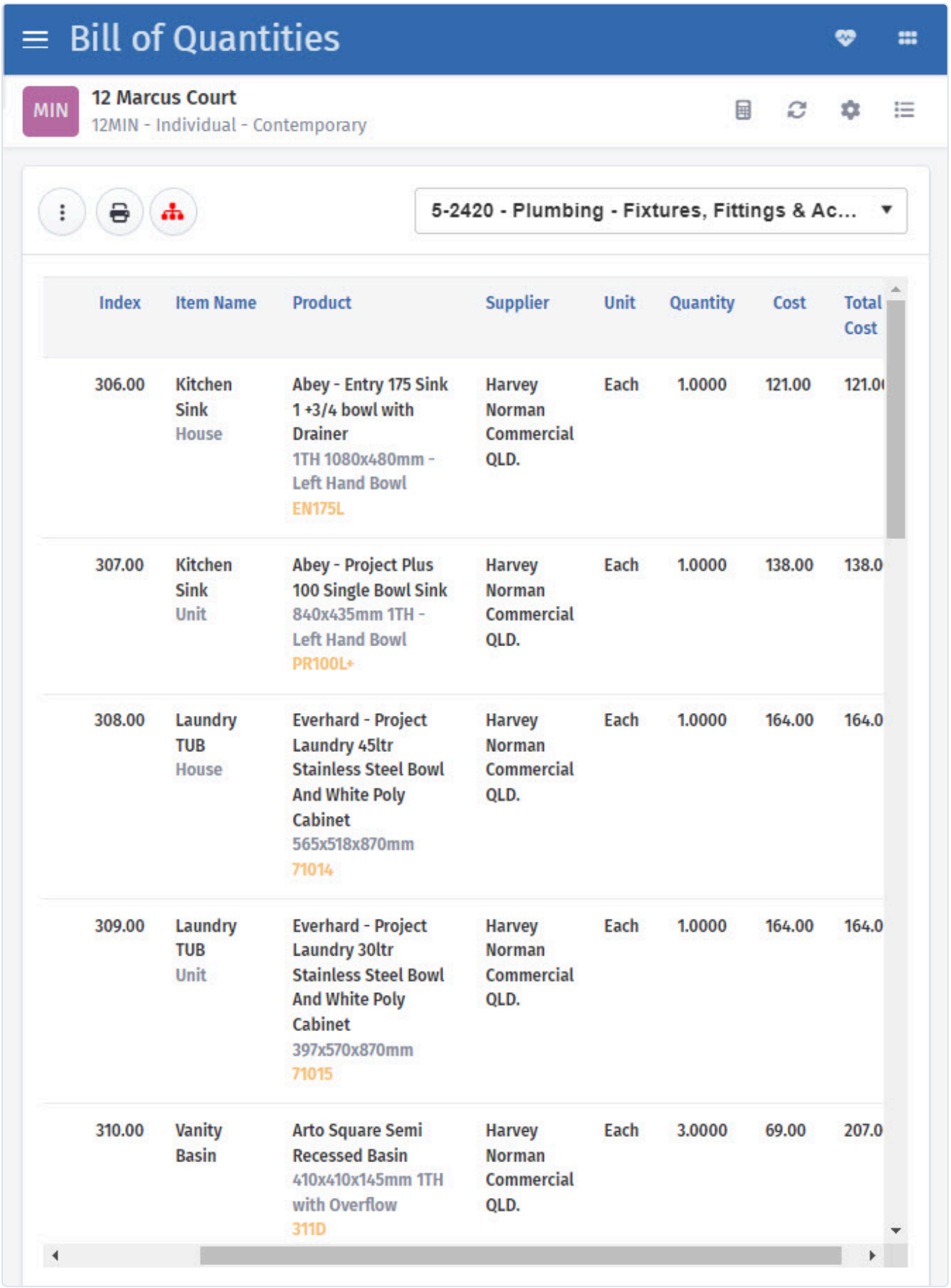
A phone on a building site gets lost.

- Use a device passcode. It is the thing protecting your job costs and client details.
- If a phone goes missing, have the user's password changed straight away, or disable the account until it is found.

38.2 What you can do on site

The Home status board and everything the mobile app covers - documents, orders, defects, the diary, checklists, timesheets, bookings, selections and messages.

The app is built for the person standing in a half-built house, not for estimating. It covers the parts of a job that happen away from a desk.



Index	Item Name	Product	Supplier	Unit	Quantity	Cost	Total Cost
306.00	Kitchen Sink House	Abey - Entry 175 Sink 1 +3/4 bowl with Drainer 1TH 1080x480mm - Left Hand Bowl EN175L	Harvey Norman Commercial QLD.	Each	1.0000	121.00	121.0
307.00	Kitchen Sink Unit	Abey - Project Plus 100 Single Bowl Sink 840x435mm 1TH - Left Hand Bowl PR100L+	Harvey Norman Commercial QLD.	Each	1.0000	138.00	138.0
308.00	Laundry TUB House	Everhard - Project Laundry 45ltr Stainless Steel Bowl And White Poly Cabinet 565x518x870mm 71014	Harvey Norman Commercial QLD.	Each	1.0000	164.00	164.0
309.00	Laundry TUB Unit	Everhard - Project Laundry 30ltr Stainless Steel Bowl And White Poly Cabinet 397x570x870mm 71015	Harvey Norman Commercial QLD.	Each	1.0000	164.00	164.0
310.00	Vanity Basin	Arto Square Semi Recessed Basin 410x410x145mm 1TH with Overflow 311D	Harvey Norman Commercial QLD.	Each	3.0000	69.00	207.0

The same job, on the device you actually have with you.

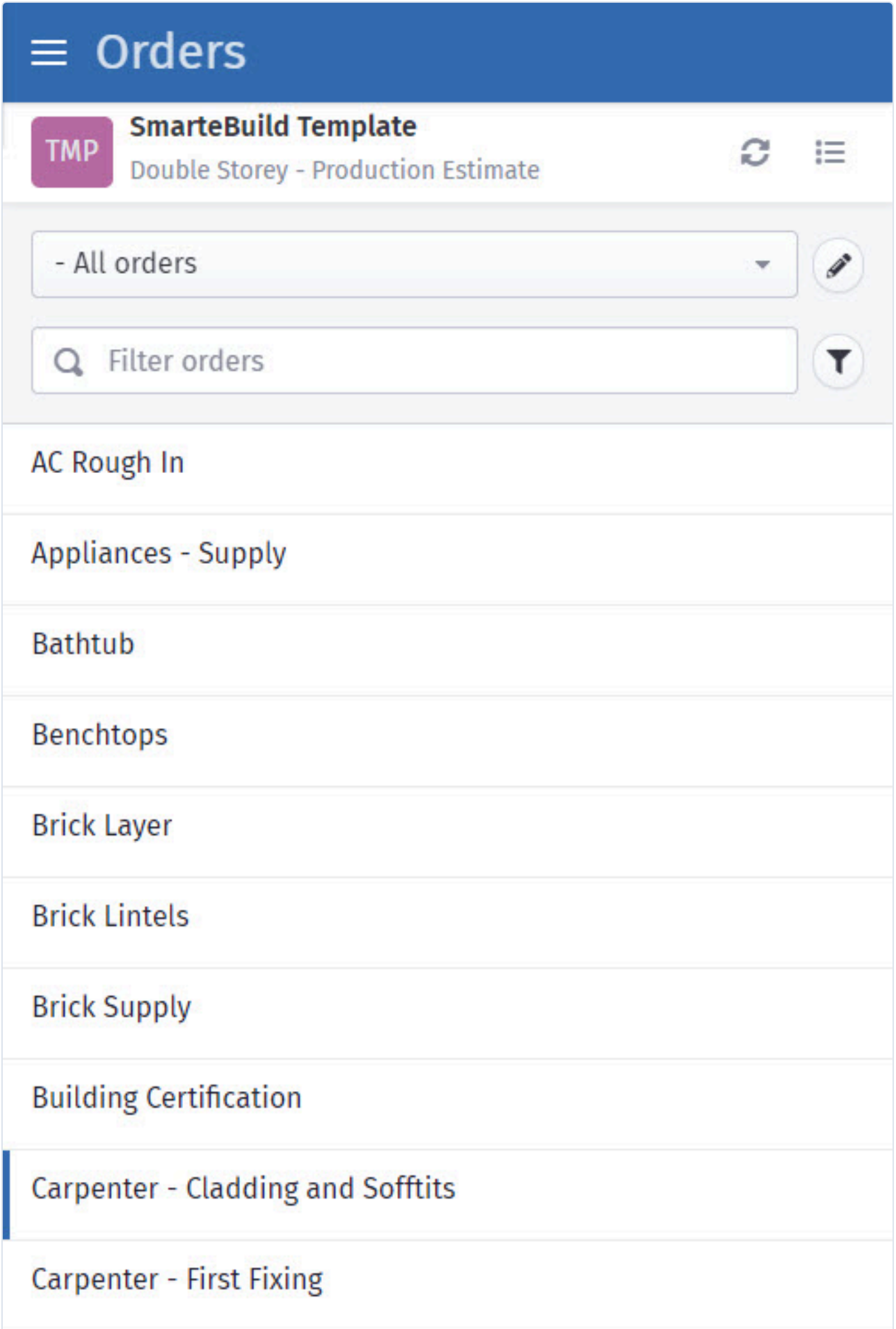
The Home screen

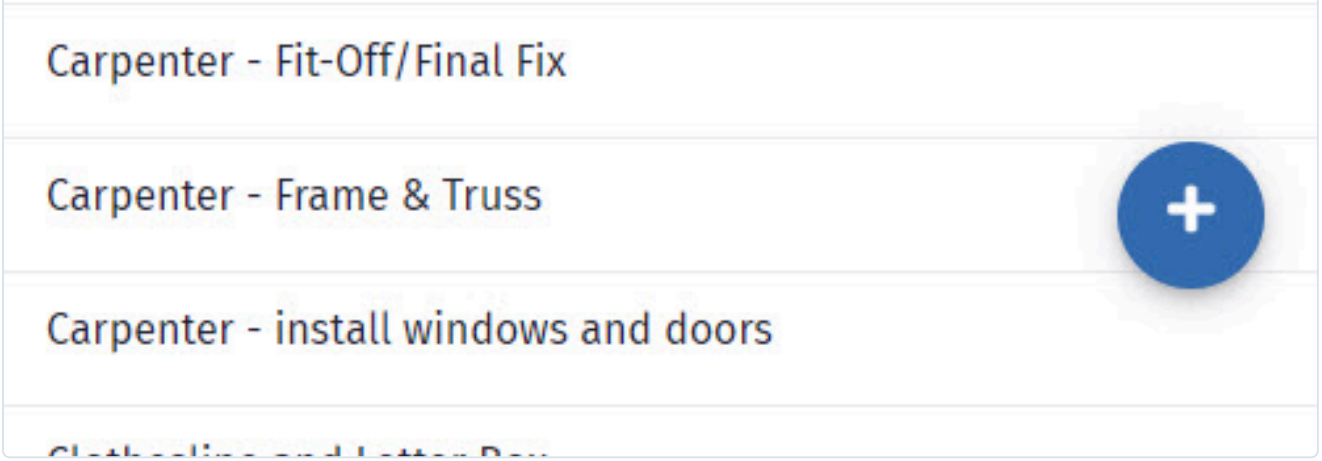
Signing in and picking a job lands you on **Home** — a status board for that job, not a menu. Each tile shows where something stands, so you can see what needs attention before opening anything.

Tile	Tells you
Documents	The drawing register
Bill of Quantities	What the job allows for, and what has been ordered
Suppliers	Ring a supplier or subbie — this job's first
Purchase Orders	What is committed, and what is still to come
Bookings	Who is confirmed, and who has not replied
Defects	How many are open
Site Diary	Whether today's entry has been started
Checklists & Safety	What is outstanding
Colour Selection	Where the client's selections are up to
Tenders	Packages out for pricing
Messages	Team chat for this job

Tiles say what is actually happening rather than just naming the module — *"Nothing on site today"*, *"Not yet confirmed"*, *"No open defects"*, *"Nothing to chase"*. A quiet board means a quiet day.

What each part does


Orders
TMP
SmarteBuild Template
Double Storey - Production Estimate
- All orders
Filter orders
AC Rough In
Appliances - Supply
Bathtub
Benchtops
Brick Layer
Brick Lintels
Brick Supply
Building Certification
Carpenter - Cladding and Sofftits
Carpenter - First Fixing



Re-send an order from site without going back to the office.

Documents

Every drawing and document on the project, in folders, showing the **current** revision.

This is the feature that earns the app. A supervisor who can open the current drawing on site does not ring the office, does not work from a printed set that is two revisions old, and does not guess. See Versions and revisions.

Bill of Quantities

What the job allows for, line by line — to look up, not to edit.

Open a cost code to see its lines, or type in the search box to find a line anywhere in the job by its name, product, supplier or SKU. Tap a line for the detail: the quantity and unit, the supplier and product, the notes, and **how much of it has been ordered so far**. A line that is fully ordered is marked **Ordered**; a part order shows as "3 of 12 ordered".

It answers "what did we allow for here?" and "has that been ordered yet?" without a call to the office. If a variation touches a line, the detail says so — check before building to the original.

Rates and totals only show for people with the **See costs** permission on the Bill of Quantities. Everyone else sees quantities, products and suppliers, and no money.

Only lines that are included in the job appear. Changing quantities, rates or products stays on the desktop.

Suppliers

Your company's supplier phone book, with a **call button on every line**.

Suppliers with a purchase order or a defect on the job you have open are listed first, under **On this job** — on site, "the plumber" means the plumber on this job. Everyone else follows, and the search box finds a supplier by its name or by the name of a person who works there.

Tap the green button to ring the office line. Tap the supplier's name for the rest: the email address, the street address (opens in maps), any note on the record, and **the people** — each with their own call and email buttons. A contact marked *for call ups* is the one to ring about a no-show; *for orders* is the one to ring about a delivery.

The call button hands the number to your phone's dialler; you still press Call, so a slip of the thumb never rings anyone. The list is kept on the phone, so it opens with no signal — the call itself needs coverage, of course.

Suppliers are added and edited on the desktop under **Suppliers**. Archived suppliers do not appear. If a number will not dial, the record has something other than a number in the phone field — fix it on the desktop.

Purchase orders

What was ordered, from whom, at what, and when it is due — with the part numbers.

It answers the questions asked most often on site: did we order the tie-downs, what was in the frame order, when is the concrete booked, what is the SKU on that tapware.

Record a delivery when the truck turns up: what arrived, what was short or damaged, and a photo of the docket. It is saved against the order and into that day of the site diary at the same time, so the office sees it in both places and nobody has to remember it later. The order then lists everything received against it.

Bookings

Who has confirmed and who has not. The gap between *sent* and *confirmed* is where lost days live, and this is that gap on a phone. See Bookings and confirmations.

The list is the whole schedule, in the same order as the desktop Bookings sheet - a stage, then the tasks under it - and the chips along the top are the same choices as the desktop's **Booking** dropdown: All, Due for call up, Needs rebooking, then each call-up status. **Hide completed** is on by default on the phone; switch it off to see finished tasks (struck through). A task with no supplier on it yet is listed with a **Choose supplier** button: pick the supplier, then the person the booking goes to, and the call-up buttons appear. **Change supplier** does the same on a task that already has one, unless the task is costed from a purchase order (its supplier comes from the order - change it there). Both need the *Edit tasks* schedule permission, the same as the desktop.

Open a booking and you can also mark the work **Started today** or **Finished today**. That goes straight onto the program, so the office sees what actually happened without ringing around. Marking something started stamps today only when no date was recorded, so it never overwrites a date the office set, and changing your mind about *finished* leaves the dates alone.

Defects

Log a defect where you are standing, with a photo, against a location. You can also **notify the supplier** responsible and track the notices you have sent.

See Defects on site.

Site Diary

Today's record — who was on site, deliveries, delays, issues and photos. Filled in on site takes two minutes; reconstructed at a desk on Friday it is guesswork.

See The site diary on the phone.

Checklists & Safety

Run a checklist item by item, capture photos where an item requires one, and collect a signature. Incidents are reported from the same place.

See Checklists and incidents.

Timesheets

Clock in and out on site rather than reconstructing hours later.

See Timesheets on the phone.

Colour Selection

The client's selections schedule, for when someone on site needs to know which tile goes in which room.

Tenders

Packages you have out for pricing, and what has come back.

Notifications

The bell at the top of the Home screen is the same one on the desktop: orders sent and orders waiting to be approved, tenders sent, variations your client approved, declined or paid for, and call-ups a subcontractor confirmed or turned down. Reading one on the phone marks it read on the desktop too, because it is one list, not two.

Messages

The job's team chat, with push notifications. See Messages on the phone.

Client portal

The job's clients and their portal links. Create a client's link, **Invite** them by email, **Share link** through the phone's share sheet (which is also how you copy it), or revoke a link that should no longer work. The card shows whether the client has opened the portal and when they last used it. The portal itself is a web page for the client; they never need the app. See Client portal.

Dictation

Anywhere the app asks for more than a few words — a diary note, a defect description, an incident account — there is a **dictation button**. Speak instead of typing.

On site, with gloves or wet hands or one hand full, this is the difference between a record that gets made and one that does not. See Dictation.

What still needs a desk

The app is deliberately not the whole system. Not on a phone:

- Estimating — editing the BOQ (the phone only looks it up), cost codes, take-off
- Raising orders, tenders, claims and variations
- Building checklist templates
- Approving timesheets
- Reports

Nobody prices a job on a phone, and the app being focused is why it is quick to use one-handed with a set of keys in the other.

Getting the most from it

Keep documents current. The app is only as useful as the register behind it.

Raise orders promptly at the office, so they are on the supervisor's phone when the delivery arrives.

Keep the schedule current, or site staff checking tasks against a stale schedule stop checking — and do not tell you they have stopped.

Set the site address on the project. It flows onto orders, which is what the delivery driver needs.

38.3 Defects on site

Logging a defect with a photo where you are standing, notifying the responsible supplier, and tracking the notices you have sent.

Defects are found on site and fixed on site. Logging them there — rather than writing notes and typing them up later — is the single biggest improvement the app makes to the process.

Logging one

Defects → New defect. You are asked for:

- **Location** — which room or area
- **Observation** — what is wrong
- **A photo**
- **The supplier** responsible, if you know

Write it for the person fixing it

They were not at the inspection. Give them **what**, **where exactly**, and **how much**:

Weak	Better
`Paint`	`Paint runs to architrave, door 3 side, approx 300mm`
`Scratch`	`Scratch to benchtop, 150mm, left of sink`
`Tile`	`Chipped tile, 2nd row from floor, wall behind toilet`

Use the **dictation button** rather than thumb-typing that on a phone — see Dictation.

Photograph everything

A photo removes the argument about whether something is a defect, and removes the second site visit where the trade could not find it. Taking it at the moment you log the defect costs nothing; going back for it costs a trip.

> **Walk the job with the app open** — Logging as you go beats writing notes and typing them up later — the descriptions are more precise and the photographs actually get taken. A 40-item inspection done this way is finished when you reach the front door.

Defects with several photos

A defect can carry more than one photo: a client reporting through their portal can send up to six, and the office can add more on the Defects page. In the list, a small **+2** on the thumbnail means there are two more

photos than the one shown. Open the defect and the rest sit in a row under the main photo; tap one to see it full screen, tap again to close.

At the end of that row, **Take** and **Choose** add another photo, and the small × on a photo takes it off (it asks first). These happen straight away, without pressing Save. A defect holds up to 12 photos. Removing a photo only unlinks it: the file stays in Documents, in the **Defect Photos** folder.

The **main** photo at the top still works as before: Replace or Remove it, then Save. If you remove it, the next photo takes its place.

Notifying the supplier

Notify supplier sends the defect to whoever is responsible, from the phone.

That closes the gap between finding a defect and telling someone about it, which is otherwise a job that waits until you are back at a desk — and often until Monday.

The notice carries the description, the location and the photo, so the trade has what they need to price and plan the fix without ringing you.

Notices

Defect notices lists what you have sent and where each stands.

A supplier can respond to a notice — marking work **fixed**, or **disputing** it — and that response comes back here. So the list answers, without any chasing: what have I sent, what has been actioned, and what has somebody pushed back on.

Open a notice to see its full history.

Chasing

Work the list oldest first. A notice sent three weeks ago with no response is one phone call, and it is much better made now than at handover.

What still happens at a desk

- Building the defect **locations** structure for a job
- **Importing** an inspector's spreadsheet
- Marking defects **fixed** in bulk after a trade has been through
- **Print options** and the handover reports

See Logging defects and Reports and handover.

A practical inspection routine

1. Walk the job with the app open.
2. Log each defect where you are standing — location, dictated description, photo.
3. Set the supplier as you go, while you remember who did it.
4. Back in the vehicle, send the notices.
5. At the desk, produce the per-trade lists for anything not covered by a notice.

Steps three and four are the ones that save a day later. A defect logged without a supplier has to be assigned by somebody who was not there.

38.4 Checklists and incidents

Running a safety or quality checklist on site, capturing the photos an item requires, collecting a signature, and reporting an incident.

Checklists are the reason a lot of builders put the app on a phone in the first place. A pre-pour check, a safety walk, a handover inspection — done where the work is, signed on the spot.

Running a checklist

Checklists lists what is outstanding for this job. Open one and work down it.

Each item asks for one of:

Answer type	You give
Pass / Fail	A tap
Text	A written answer — use dictation
Number	A measurement or count
Photo	A photograph

Some items **require a photo** before they can be answered. The run will not let you finish past one of those without it — which is the point. A pre-pour check with no photo of the reinforcement is not evidence of anything.

Signing

Close out collects a signature on the device.

That signature, the answers, the photos and the time they were captured are stored together as the record of that run. It is the document you produce when somebody asks whether the check was actually done.

> **Sign on site, not later** — A signature collected in the site office at the moment the check finishes means something. One collected in the ute the next morning is a formality, and it shows.

Why doing it on the phone matters

A checklist filled in on paper has to be transcribed, and the photos live somewhere else — usually a camera roll nobody searches. Done on the phone, the answers, the photographs and the signature are one record attached to the job.

It also timestamps itself. "The frame was checked before the pour" is an assertion; a run closed out at 7:42am with six photographs is a fact.

Incidents

Incidents is the safety register — near misses, injuries, property damage, anything that needs recording.

Report an incident captures what happened, when, who was involved and photographs. The form prompts for *"facts, in order. What, who, how."*

Write facts, not conclusions

An incident report is read later by people deciding what happened. Write what you saw and can support:

Avoid	Prefer
`Carpenter was careless`	`Carpenter stepped backwards off the second rung, landed on left ankle`
`Scaffold was unsafe`	`Guard rail missing from the north bay, third lift`
`Nobody was hurt luckily`	`No injury. Load fell approx 2m, landed in an area nobody was working in.`

Record it the same day. An incident written up a week later is a recollection, and it reads like one.

Closing an incident

Close incident records the outcome once it has been dealt with — what was done, and by whom. An incident left open indefinitely is a register nobody trusts.

What still happens at a desk

- **Building checklist templates** — the items, answer types and which require a photo
- Assigning a template to a contract stage
- Reviewing completed runs and the incident register
- Reporting

See Checklists and safety.

A workable routine

1. Open the job's **Checklists** tile — it shows what is outstanding.
2. Run the check where the work is, not from the site office.
3. Take the photos as you go; the required ones will stop you anyway.
4. **Close out** and sign before you leave.
5. Report any incident the same day, with photographs.

38.5 Dictation

Speaking instead of typing for diary notes, defect descriptions and incident reports.

Anywhere the app asks for more than a few words, there is a **dictation button**. Tap it and speak.

Where it appears

- **Site diary** — notes, issues, delay reasons

- **Defects** — the observation
- **Incidents** — the account of what happened
- **Checklists** — text answers

These are exactly the fields that get left blank or filled with one word when the only option is thumb-typing on a site.

Why it matters more than it sounds

The quality of a site record is decided by how easy it was to make.

A defect typed with one thumb becomes `paint`. The same defect dictated becomes *"paint runs to the architrave on the door 3 side, about 300 millimetres, needs sanding back and recoating"* — which is a description the trade can act on without ringing anybody.

The record you get is not marginally better. It is a different thing.

> **Dictate the detail, then tidy it** — Speak the full description on site, and fix any wording later at a desk if it matters. Getting the facts captured while you are looking at the problem is the part that cannot be done afterwards.

Getting good results

Say the location first. *"Main bathroom, wall behind the toilet, chipped tile second row from the floor."* It puts the important part at the front where it survives.

Speak normally. Slow, over-enunciated speech recognises worse, not better.

Turn away from the noise. A compressor or a drop saw will defeat it. Ten seconds somewhere quieter is faster than three attempts next to the noise.

Check numbers. Dimensions and quantities are what dictation gets wrong most — `300` and `3000` sound similar with an angle grinder running. Glance at anything numeric before saving.

Punctuation is optional. A run-on sentence that says the right thing beats a tidy one that took four attempts.

When it will not work

Dictation needs a connection. On a site with no signal, type a short note and add the detail when you are back in range — see Working with poor reception.

The phone's own keyboard dictation also works in these fields if you prefer it.

38.6 Working with poor reception

Building sites have bad signal. What to expect from the app, and how to prepare so it does not matter.

Building sites have poor reception. Concrete, steel, basements and half-built houses in new estates all work against a phone signal.

The app keeps working when the signal does not. A job you have opened stays on the phone, so its screens still open with no bars showing. Anything you save while you are out of range is held and sent by itself the moment you are back.

A bar along the bottom tells you which of those is happening: *No signal* while you are out of range, then *Sending* while the held work goes up. When neither is showing, everything is through.

What is held, and what is not

Held until the signal returns: a defect, a diary entry, a checklist answer, hours, a delivery you record, a task you mark started or finished.

Not held: anything you have not opened before. A drawing you have never viewed on this phone cannot appear from nowhere, and a photo still needs signal to upload. Closing the app completely before the signal returns also loses work that was still waiting, so give it a moment near a bar of signal before you finish for the day.

Planning ahead still costs less than hoping.

Load what you need before you go

The most effective habit: open the job on **wi-fi** before leaving the office, and look at the documents you expect to need.

A drawing you have already opened is far more likely to be there when the signal is not. Three minutes in the office beats twenty minutes in a driveway looking for a bar of signal.

Have a fallback for the critical documents

For anything you absolutely must have on site:

- Save it to the phone's own files or downloads
- Or carry a printed copy

The drawing you need at the moment of a pour is not the moment to discover the basement has no signal.

> **Print the one drawing a pour depends on** — Digital-first is right for almost everything. The exception is the handful of documents where being unable to open one stops work — the slab setout, the truss layout, the drainage plan. A printed copy costs nothing and removes the failure mode entirely.

Where signal is usually worst

Predictable, and worth anticipating:

- Basements and sub-floor areas
- Inside a steel-framed or fully-clad building
- New estates before the network catches up
- Rural blocks
- Anywhere behind a hill

If a job is in one of these, plan for the app not working on site rather than discovering it each visit.

Practical measures

Wi-fi where there is a site office. Even a phone hotspot from a vehicle parked at the front of the block often beats the signal inside the building.

Step outside. Obvious, and usually enough — most reception problems on a building site are the building, not the network.

Check before you need it. Open the app when you arrive rather than at the moment a delivery driver is waiting.

What to expect when there is no signal

The app needs a connection to fetch fresh data. With no signal you may not be able to load a document you have not opened before, or see orders raised while you were out of range.

When the signal returns, the app catches up. Nothing is lost — it is a matter of when you can see it, not whether it exists.

If it is a persistent problem

If a job simply has no usable signal, plan around it rather than fighting it:

1. Load everything on wi-fi before each visit.
2. Print the critical drawings once and keep them in the vehicle.
3. Do the office work — orders, claims, schedule updates — at the office.
4. Note what you need on site and act on it when you are back in range.

That is how site work was done before phones, and it is still a perfectly good fallback for the jobs where the network has not arrived yet.

CHAPTER 39

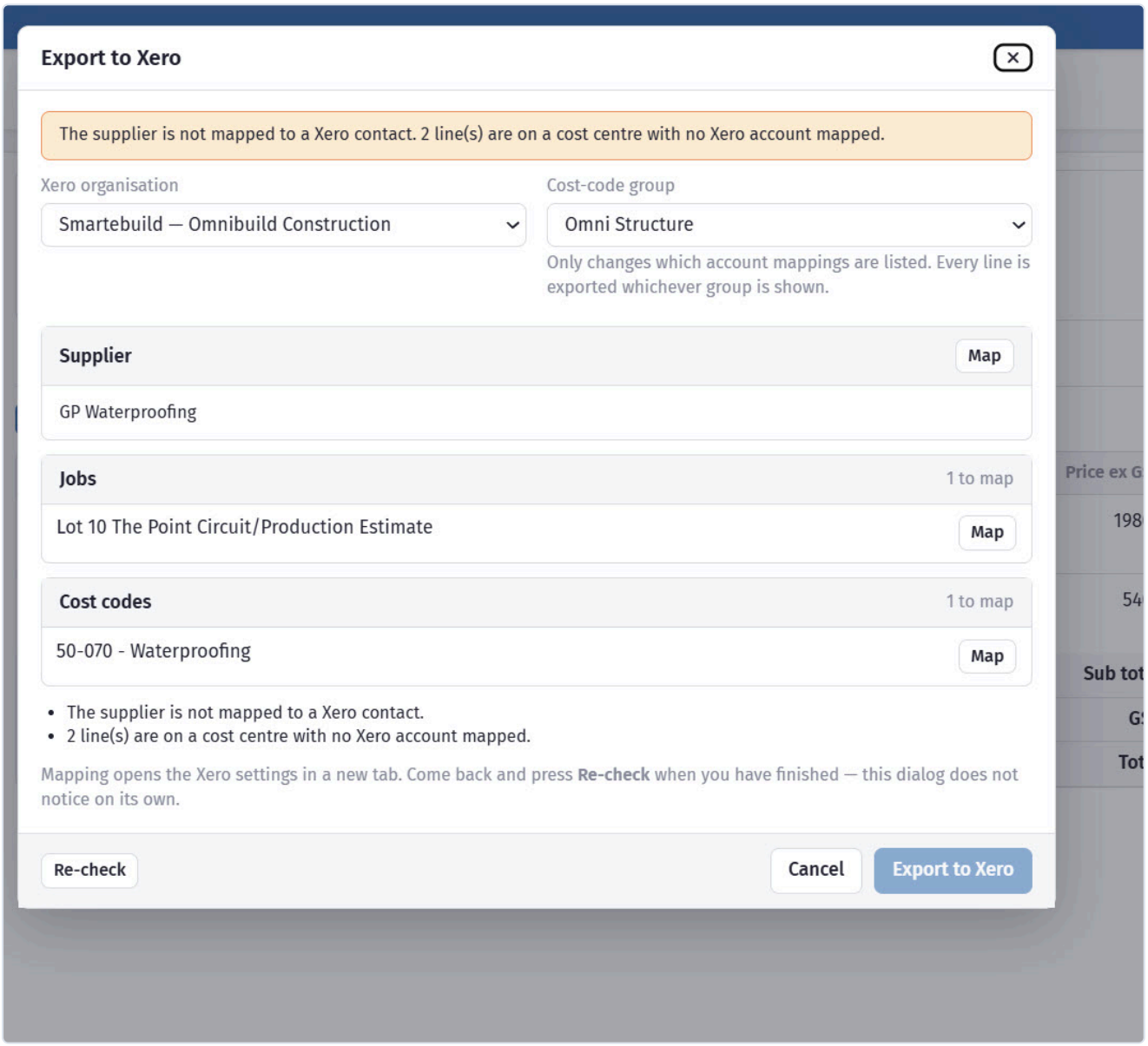
Integrations

39.1 Xero BUILDER PLAN

Connecting Xero, matching your accounts, jobs and suppliers, and pushing orders and expenses across without entering them twice.

The Xero integration takes purchase orders and expenses from SmarteBuild into your accounting system, so the same invoice is not typed twice.

Open it from **Integrations** in the top bar → **XERO Integration**. It is one screen with four tabs — **Connection**, **Accounts**, **Jobs** and **Suppliers** — and the **Help** button at the top right walks through the same steps as this page.



Push invoices across rather than typing them in twice.

Setting it up, step by step

Four jobs, done once, in this order. Nothing is sent to Xero from these tabs — they only decide what matches what.

1. Connection

1. Press **Connect a Xero organisation**. Xero opens in a small window and asks you to sign in. Xero calls an organisation a *tenant*; the two words mean the same thing.
2. In Xero, choose the organisation and allow access. When that window closes, the organisation appears in the list on the Connection tab showing **Active**.
3. In the **Linked SmarteBuild company** column, choose your company from the list and press **Link**. If you belong to more than one SmarteBuild company, pick the one this Xero organisation belongs to.
4. If you connect more than one organisation, click an organisation's name to make it the one the other three tabs work in. The one in use is marked **in use**.

The **Setup progress** card shows how far along the other three tabs are — *38 of 40 cost codes linked*, *No Xero contacts downloaded yet* — and clicking a card opens that tab. When all three read 100% the setup is finished.

Refresh connections renews every organisation's connection in one go — the same thing signing in does when the first option below is ticked. If one is still marked **Needs reconnecting** afterwards, Xero has revoked it: press **Connect a Xero organisation** and sign in again.

Under **Options**, tick what suits how you work, then **Save options**:

Option	What it does
Reconnect to Xero when I sign in	Refreshes the connection as part of signing in, so it is ready when you need it
Reconnect automatically if the connection expires	Renews an expired connection rather than asking you to
Switch Xero organisation when I switch company	Follows you when you change SmarteBuild company
Disconnect from Xero when I sign out	Drops the connection when you sign out. Leave off unless you share a computer

The first two are worth ticking if you use Xero daily.

2. Accounts

Matches your Xero accounts to your SmarteBuild cost codes, so costs land in the right place in Xero.

1. Open the **Accounts** tab and press **Refresh from Xero**. This copies your chart of accounts in. Press it again whenever you add accounts in Xero.
2. Choose your cost code list in the **Cost code group** box.
3. Press **Link obvious matches**. Anything whose code or name already lines up is matched for you — usually most of the list, if your codes are the same in both systems. The number on the button is how many are waiting.
4. Match the rest by hand, from whichever side is easier:

- On a **SmarteBuild cost code** with no account, press **Use "…"** to accept the suggested match, or type a few letters in **Choose Xero account…** and pick one.
- On a **Xero account**, click the row to expand it. It lists every cost code it carries, and **Link a / another cost code…** adds one. One account can carry many cost codes — *Materials purchased* might hold thirty — and this is where you see exactly which.

The count at the top of each list — *3 of 40 not linked* — and the bar under it tell you how much is left. **Not linked** shows only the work still to do; on the Xero side, **Not used** shows accounts nothing points at. Only cost codes you actually buy against need an account.

When one side is missing something. If a cost code has no sensible account in Xero, press **+ Create in Xero** beside it — SmarteBuild creates the account in your Xero organisation and links it. If a Xero account has no cost code here, expand it and press **+ Create in SmarteBuild**. Both ask before they write anything. To do a whole list at once, **More › Import all from Xero** creates a cost code for every unused account, and **More › Export all to Xero** creates an account for every unlinked cost code (forty at a time; press again for the rest).

Hide (inside an expanded Xero row) takes an account you never use off the list. Nothing in Xero changes, and **Refresh from Xero** brings every hidden row back.

3. Jobs

Matches Xero tracking options to your SmarteBuild jobs, so Xero can report by job. Only needed if you use tracking categories in Xero — skip it if you do not.

1. Open the **Jobs** tab and press **Refresh from Xero**.
2. Choose the **Tracking category** you use for jobs.
3. Press **Link obvious matches** for the ones whose names already agree, then give each remaining job its tracking option with **Use "…"** or **Choose Xero tracking option…**.

Xero has no way for SmarteBuild to create tracking options, so this tab has no **Create**, **Import all** or **Export all** — add the option in Xero, then **Refresh from Xero**.

4. Suppliers, then one test

Matches your Xero contacts to your SmarteBuild suppliers, so bills are raised against the right contact.

1. Open the **Suppliers** tab and press **Refresh from Xero** to copy your contacts in.
2. Choose a **Supplier category**, or **All suppliers** to see everyone at once.
3. Press **Link obvious matches**, then give each remaining supplier its contact with **Use "…"** or **Choose Xero contact…**. Contacts show their address under the name, which is how you tell two *Bunnings* apart. The search boxes narrow both lists as you type; press **/** to jump to the search.
4. A Xero contact with no supplier here? Expand it and press **+ Create in SmarteBuild** — the new supplier opens in another window so you can finish its details. A supplier with no contact in Xero? **+ Create in Xero**. **More › Import all from Xero** and **Export all to Xero** do the whole list.
5. Now export **one** expense or purchase order and check the draft bill in Xero: right contact, right account, right amount.
6. Then use it for real.

More › Download mapping as CSV on any tab gives you a spreadsheet of both sides and what is linked to what — worth sending to your bookkeeper before the first real export.

Each user connects for themselves. **Disconnect all** on the Connection tab removes your own connections only; the account, job and supplier matches are kept.

Connecting

Access is per user — a user needs the **Xero integration** setting on their account. Grant it to whoever does the books, not to everyone. See Adding users.

Xero connections expire. If an organisation shows **Needs reconnecting**, press **Refresh connections** first — that renews it without a sign-in. **Test** beside an organisation asks Xero whether that one connection still works and says why if it does not. If it is still marked **Needs reconnecting**, press **Connect a Xero organisation** and sign in again. Ticking **Reconnect automatically if the connection expires** under Options avoids most of this.

The three matches

This is the part that determines whether the integration is useful. Three things have to be told what corresponds to what.

Tab	What it connects
Suppliers	Your suppliers ↔ Xero contacts
Jobs	Your jobs (estimates) ↔ Xero tracking options
Accounts	Your cost codes ↔ Xero account codes

On each tab the two lists sit side by side. Each SmarteBuild row has **one** Xero partner, shown in green with an **Unlink** button beside it. Each Xero row can carry **many** SmarteBuild rows — expand it to see exactly which, each with its own **Unlink**, and **Unlink all N** when you want to clear the whole row. **More › Unlink all** clears the whole tab — only worth doing if you want to start again. Unlinking never deletes anything in Xero or in SmarteBuild; it just forgets the match.

The same controls appear on all three tabs: **Not linked** / **Linked** on the SmarteBuild side, **Not used** / **In use** on the Xero side, a progress bar under each list, **Hide** inside any expanded Xero row, and the **More** menu for the bulk actions and the CSV.

Suppliers

The usual obstacle is name mismatches — `Barwon Concrete` here and `Barwon Concrete Pty Ltd` there. Tidying your supplier list first makes this far quicker, and merging duplicates before matching saves doing it twice.

Jobs

Matches a job to Xero's tracking category, so costs land against the right job in your accounts. This is what lets your accountant produce job-level profitability from Xero rather than from SmarteBuild.

Cost codes to accounts

Matches your cost codes to Xero account codes.

> **Use the same codes in both systems** — If your cost code numbers match your Xero chart of accounts, **Link obvious matches** does nearly all of this for you and it stays right as both change. If they diverge, it is a match to maintain forever. Worth aligning them once, early.

Pushing data across

Once matched:

- **Export order to Xero**, on a purchase order
- **Export to Xero**, on an expense — tick **Open in Xero** to be taken there afterwards
- **Delete Xero connection** removes the link on a record

The point is that the reference and the amount agree in both systems because they were entered once. Anything entered twice disagrees eventually.

Sending expenses in a batch

On the expenses list you can tick several expenses and send them together.

You are shown what **would** happen before anything is sent, with a reason beside anything that cannot go — which is nearly always an unmatched supplier or a cost code with no account. Fix those, or send the rest and come back.

Bills arrive in Xero as **drafts**. Nothing is authorised on your behalf.

What goes which way

Orders and expenses go **from SmarteBuild to Xero**. That is where they are paid.

Bill status comes **back**: once an expense has been exported, SmarteBuild reads what Xero says about it — authorised, paid, part paid, voided — so you are not checking two screens to find out whether a supplier has been paid.

Direction	What moves
SmarteBuild → Xero	Orders, expenses and credit notes, as drafts
Xero → SmarteBuild	Status, total, amount still owing, paid date

Credit notes go across as **credit notes** (Xero's `ACCPAYCREDIT`), not as bills for a negative amount, and come back with how much of the credit is still unapplied. Applying a credit against a particular bill is still done in Xero.

SmarteBuild remains the record of what a job cost and where the money went by trade; Xero is the record of what the business spent and what has been paid. Payment and reconciliation still happen in Xero.

> **A voided bill releases the expense** — If you void or delete a bill in Xero, SmarteBuild notices and unlinks it, so the expense can be sent again. Otherwise it would sit there looking exported, linking to something that is no longer there.

The mismatch check

Because Xero's total comes back, it gets compared with the expense — and that one comparison catches three separate problems: a bill missing a line, the same bill entered twice, and a bill edited in Xero after it was sent.

Mismatches are counted at the top of the expenses list and flagged on the row. Where a difference is real and you have decided to leave it, you can accept it so it stops being counted.

This is the check most worth having. It is also the reason to export rather than re-key: the comparison is only possible because both sides came from one entry.

When something will not export

Symptom	Usually
Supplier not found	That supplier is not linked to a Xero contact — see the **Suppliers** tab
Account error	The cost code is not linked to an account — see the **Accounts** tab
Authorisation error	The connection has expired — press **Refresh connections** on the Connection tab; if it is still marked **Needs reconnecting**, connect again
A list on a tab is empty	Press **Refresh from Xero**. If still empty, check the organisation marked **in use** is the right one
A Xero row is missing	Someone pressed **Hide** on it. **Refresh from Xero** brings every hidden row back
"Xero would not create..."	Xero refused the new account or contact — usually one with that code or name already exists there. **Refresh from Xero** and link to it instead
Nothing happens	The user does not have the Xero integration setting
Status never updates	The expense was never exported, or the connection has expired

Most failures are an unmatched record rather than a broken connection. Check the three tabs first.

Worth doing at setup

1. Tidy and de-duplicate your supplier list.
2. Align your cost code numbers with your Xero chart of accounts.
3. Connect, then work through the Accounts, Jobs and Suppliers tabs — **Link obvious matches** first, then the rest by hand.
4. Export **one** order and check it landed correctly in Xero.
5. Then start using it in anger.

Step four is the one people skip, and it is the one that catches a matching mistake before it is replicated across two hundred records.

39.2 Office 365 and Outlook

Connecting your Microsoft 365 mailbox so orders, tenders and claims send from your own address without SMTP settings.

Connecting Office 365 lets SmarteBuild send from your Microsoft mailbox directly, without SMTP host and password settings.

Set it up from **Integrations** in the top bar → the Office 365 connection.

Why use it rather than SMTP

Microsoft has progressively restricted plain password sign-in from third-party applications. SMTP against a Microsoft 365 mailbox generally now requires an **app password**, and in some tenants is blocked entirely.

The direct connection avoids that. You authorise SmarteBuild against your Microsoft account once, and no password is stored.

It also means mail sent from SmarteBuild appears in your own **Sent Items**, which SMTP sending does not always do.

Connecting

Login opens the Microsoft sign-in and authorises the connection. **Email Address** is the mailbox to send from.

Reconnect when Login re-establishes the connection automatically when it expires, which saves discovering it has lapsed at the moment you send a tender.

The connection window opens as a popup — if nothing appears, check the browser is not blocking popups for SmarteBuild.

What it sends

Everything SmarteBuild emails on your behalf:

- Purchase orders
- Tender invitations
- Variations
- Progress claims
- Void notices and other notifications

All from your own address, so replies come back to you.

Per user

Each user connects their own mailbox. That is the point — an order from Dave should come from Dave's address and be replied to in Dave's mailbox.

A generic company address means replies land in a shared mailbox where they compete with everything else.

When it stops working

Symptom	Usually
Prompted to sign in again	The authorisation expired — reconnect
Popup never appears	The browser blocked it
Sends but recipients do not receive	Check spam, then check the recipient address
Consistently lands in spam	Your domain's SPF and DKIM records

That last one is worth chasing properly. Tender invitations landing in spam are lost bids, and you never find out they were lost. It is a DNS change your IT provider makes once.

SMTP as the alternative

If the connection is not available in your tenant, SMTP still works — with an app password rather than your normal one. See Email settings.

Test it before you need it

Send yourself one order after connecting.

Check three things: it arrives, it comes from the right address, and your signature appears correctly. Two minutes, and it beats finding out mid-tender.

39.3 Gmail and Google

Sending from a Gmail or Google Workspace mailbox, and what to do about app passwords.

If your business runs on Gmail or Google Workspace, SmarteBuild can send from your Google mailbox.

Set it up from **Integrations** in the top bar.

Two ways

The Google connection, authorised against your Google account. No password stored, and mail appears in your own Sent Mail.

SMTP, using `smtp.gmail.com`. Works, but needs an app password — see below.

The connection is the better option where it is available, for the same reasons as Office 365.

App passwords

If you use SMTP against Google, you cannot use your normal account password.

Google blocks plain password sign-in from third-party applications. You need an **app password**, generated in your Google account's security settings, with two-step verification switched on first.

Setting	Value
SMTP host	`smtp.gmail.com`
SMTP port	587
SSL required	Yes
Password	An **app password**, not your account password

> **This is the most common Gmail setup failure** — Entering the normal Google password produces an authentication error that looks like a wrong password, so people try it again more carefully and get the same result. Generate an app password and use that.

Sending limits

Google Workspace limits how many messages an account can send in a day.

That matters when sending a large tender round — twenty invitations at once can trip it, and the symptom is that some send and some do not.

If you send tenders in volume, spread them across the day or check your plan's limit.

What it sends

Everything SmarteBuild emails on your behalf — orders, tender invitations, variations, claims and notifications — from your own address, so replies come back to you.

Per user

Each user connects their own mailbox. An order from a particular estimator should come from that estimator's address.

Deliverability

If mail sends but consistently lands in recipients' spam, your domain's **SPF** and **DKIM** records probably need updating to authorise sending on your behalf.

Worth doing once, properly. It is a DNS change, and the alternative is tender invitations quietly not being read.

Test it

Send yourself one order after setting up, and check it arrives, comes from the right address, and carries your signature correctly.

CHAPTER 40

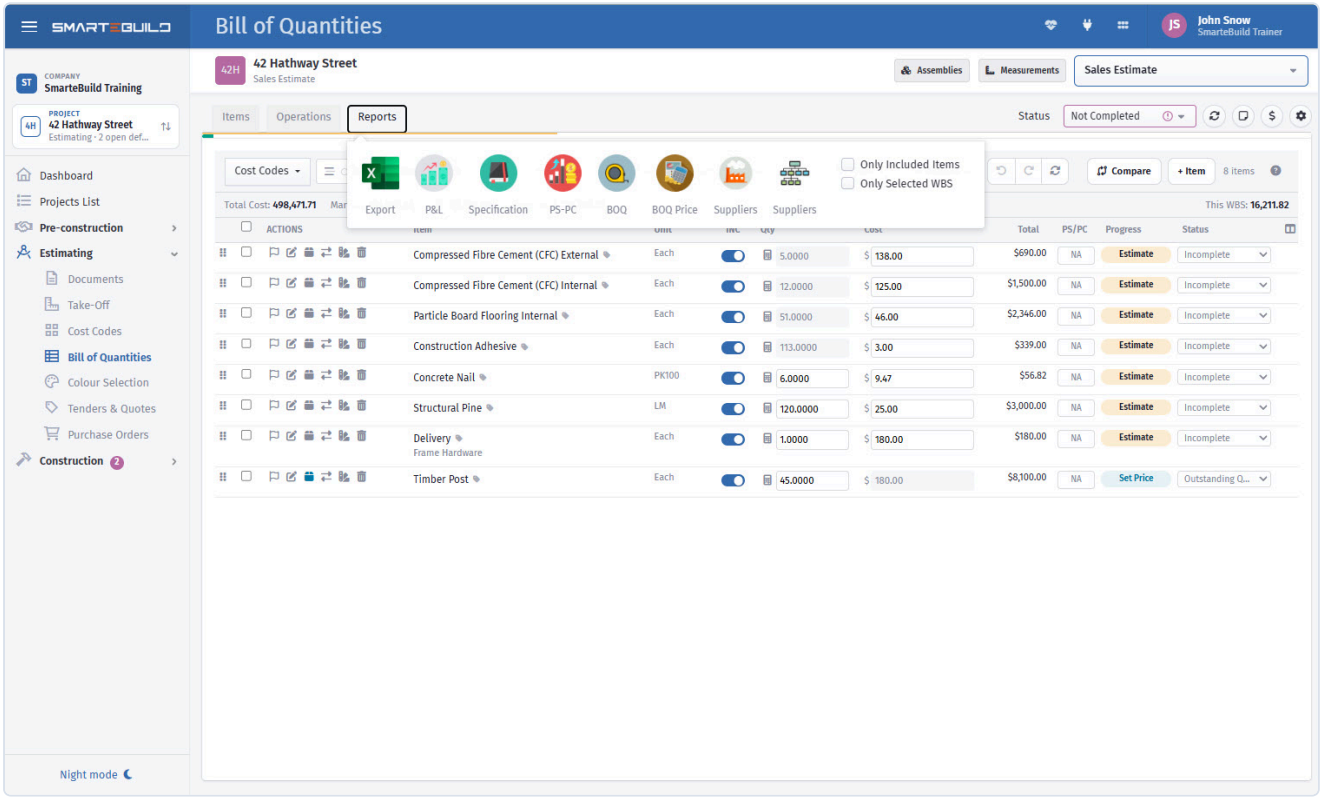
Reports

40.1 The report library

Where the reports are, which question each answers, and how to find the right one.

Reports turn what is in the system into documents — for clients, subcontractors, lenders and your own office.

They are reached from the **Reports** menu within the module the report belongs to, rather than from one central place. That takes a moment to get used to and makes sense once you do: the reports about your bill live in the Bill of Quantities.



Each module's own Reports menu. This is the one on the Bill of Quantities.

Where to look

You want	Look in
Estimate totals, the detailed bill, the specification	Bill of Quantities
Committed cost, orders by supplier	Purchase Orders list
What you have been charged	Expenses list
Claims raised and outstanding	Progress Claims list
Variations schedule	Variations list
Programme and the Gantt	Schedule
Defect lists	Defects
Selections schedule	Colour Selection
Cost against budget for a job	Estimate metrics on the Projects list

Which report answers which question

The questions builders actually ask, and where the answer is:

"What are we quoting?" — the estimate summary from the BOQ.

"Have we missed anything?" — the estimate summary read in build sequence. A trade with an implausibly small total is a trade with items missing.

"Is this job making money?" — cost against budget, read **by trade** rather than by job total. The job-level number hides a trade over and a trade under. See Cost to date against budget.

"What have we committed?" — the orders list, grouped by supplier.

"What are we owed?" — the claims list, filtered to unaccepted.

"What has the client been charged in variations?" — the variations list, filtered to the estimate, with the running total.

"When will we finish?" — the Gantt. Nothing else answers it, because nothing else understands dependencies.

Filter before you produce

Every report reflects the current state and your current filters.

Before producing one, check:

- The right **estimate** is selected, on a job with more than one
- **Only Included Items** matches what you intend to show
- Switched-off options are switched the way you mean
- Any **project filter** is not hiding something

A report produced with a filter you had forgotten about is wrong in a way that looks entirely plausible.

Before an estimate report goes out

1. Clear your **Flags** — anything flagged is unresolved.
2. Run **Show Orphan Items** — an orphan is in the total but in no trade.
3. Check the trade subtotals add to the job total.
4. Confirm the right options are switched on.

Two minutes, and it catches most of what goes wrong in a bill.

Sending them

See Exporting and sharing — and in particular, what must never leave your office.

40.2 Exporting and sharing

PDF or spreadsheet, what each audience should see, and the columns that must never leave your office.

Producing a report is easy. Deciding what goes on it, and to whom, is the part worth thinking about.

PDF or spreadsheet

Going to	Use	Why
A client	**PDF**	Fixed, readable, not invited to be taken apart
A lender or certifier	**PDF**	They want a document, not data
A subcontractor	**PDF**, or a spreadsheet if they asked	Depends what they will do with it
Your own office	**Spreadsheet**	You want to sort, filter and total it
Your accountant	**Spreadsheet**	Same

The default for anything leaving the business is PDF. A spreadsheet carries whatever columns were on screen, including ones you did not think about, and it invites recalculation.

What each audience should see

The client

Show	Never show
The price they are paying	Your cost
What is included	Your margin or markup
Variations, with values	Which subcontractor is doing what
Progress against the contract	What you are paying subcontractors
The specification	Internal notes

> **Read the report before it goes, every time** — The most expensive mistake available in this system is a client report that shows cost and margin next to the price. It is one glance, and it is worth making that glance a habit rather than something you do when you remember.

The risk is highest the first time you send a report you have not sent before, and the second time — when it feels familiar but you have not actually checked this version of it.

A subcontractor

Their trade's scope and quantities. Not the rest of the bill, not what you allowed for their work, and not what their competitors quoted.

Filter to the cost code before producing it.

Your office

Everything. Cost, committed, actual, margin, variance by trade.

Internal notes stay internal

BOQ items carry three note fields, and they go to different places:

Field	Goes
Note	Visible in the bill
Internal Note	Never printed on anything that leaves the office
Purchase Order Note	Printed on the supplier's order

Use **Internal Note** for anything you would not want read aloud — *"check this rate, looks light"*, *"only use this supplier if the other one is booked"*. It is the field designed for exactly that.

Filing what you send

Attach the reports you issue to the project in Documents — the submitted estimate, each progress claim, the signed selections schedule, the handover defect list.

Two reasons. You have a record of exactly what was issued and when. And anyone picking the job up later finds the history in one place rather than in a mailbox.

Naming exports

Name a file so it is identifiable a year later, out of context:

Weak	Better
`report.pdf`	`2026-041 Hendricks – Estimate Summary Rev A.pdf`
`claim.pdf`	`2026-041 Hendricks – Progress Claim 03 Frame.pdf`
`defects.xlsx`	`2026-041 Hendricks – Defect List 14 Nov.xlsx`

Job number, job name, what it is, and which one. It costs a few seconds and saves opening six files to find the right one.