



Training activities: Interiors/drylining

This document contains training activities. Each activity relates to a training topic and is designed to reinforce learning through practise. Once an activity has been completed, it is essential that the learner practises in their Chalkstring system, using real project data.

You can view the training videos in the Chalkstring User Hub, should you wish to familiarise yourself with any concepts.

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Session 1

Activity 1

Add a new simple material

A 'simple' material is used when you can only buy a material in one option at a single unit price.
For example, a box of screws is purchased with a price per box (e.g. box of 1000 screws), not per screw.

Log into Chalkstring.

From the main black menu, select 'Resources'.

Click the 'Materials' sub menu.

Click '+ New Material'.

Fill out the details below.

Name	<Your initials> 13mm Wafer Head Jackpoint Screws (box of 1000) <u>Please ensure you add your initials as a prefix so that your training resource can easily be identified and removed after training.</u>
Type	Fixings
Brand	British Gypsum
Package	Pick from the drop-down list
Add notes for 'Specifics'	27400/8
Define the unit of measurement	Single item
Configuration	Simple
Single unit size	1 – Select 'Box' from the drop-down list
Pack size	1 – Select 'Sold in Single Units' from the drop-down list
Waste allowance	0

Save the material.

Use the filters to find the material you have just added.

Reset the filter.



Activity 2

Add a new configurable material

Use this if you need to set up a material with different standard supplied options at one 'per unit price'. For example, a high vis jacket is £5, but you can buy them in different sizes; small, medium and large.

From the main black menu, select 'Resources'. Click the 'Materials' sub menu. Click '+ New Material' . Fill out the details below .	
Name	<Your initials> High Viz Jacket <i><u>Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training.</u></i>
Type	PPE
Brand	Unbranded
Package	Pick from the drop-down list
'Specifics'	Various sizes
Unit of measurement	Single item
Configuration	Configurable
Singular name	Item
Pack name	Sold in single units
Click 'Add new configuration'	
Name	Small
Single unit size	1
Pack size	1
Repeat for two additional sizes – medium and large	
Waste allowance	0
Save the material. Use the filters to find the material you have just added. Reset the filter.	



Activity 3

Add a new labour activity

From the main black menu, select 'Resources'.

Click the 'Labour' sub menu.

Click '+ Labour activity'.

Fill out the details below.

<i>Name</i>	<Your initials> Plasterboard <i><u>Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training.</u></i>
<i>Trade</i>	Pick from the drop-down list
<i>Quantity unit</i>	Squared Metre(s)
<i>Description</i>	All inclusive rate per skin

Save the activity.

Use the filters to find the activity you have just added.

Reset the filter.



Activity 4

Add a new fixed cost

From the main black menu, select 'Resources'.

Click the 'Fixed cost' sub menu.

Click '+ Fixed costs'.

Fill out the details below.

<i>Name</i>	<Your initials> Your initials 40 yard skip <i><u>Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training.</u></i>
<i>Period</i>	Lump sum
<i>Price per period</i>	£450
<i>Profit per period</i>	£50 (or 0 if there is no profit, but do not leave it blank).

Save the fixed cost.

Use the filters to find the cost you have just added.

Reset the filter.



Activity 5

Add a new material quote

In this activity you will create a material quote manually, selecting materials and adding pricing yourself.

From the main black menu, select 'Resources'.

Click the 'Material quote' sub menu.

Click '+ New material quote'.

Fill out the details below.

<i>Name</i>	<Your initials> BG Standard list price 2021 <u>Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training</u>
<i>Supplier</i>	Pick from the drop-down
<i>Date of quote</i>	Today's date
<i>Quote expires</i>	Next year
<i>Project</i>	Select 'All' (so that the quote applies to all your projects)

Add materials to your quote

Click '+ Add materials' (do not click '+ New material in the left corner).

Select/highlight at least 5 materials.

Click '+ Select items'.

Add prices.

Click 'Save quote'.



Activity 6

Create a quote request & import your supplier's pricing

In this activity you will create a material quote request, download it and pretend you are the supplier by adding pricing. You will then import this.

Create your quote request	
Go to the 'Material Quote' sub menu. Click 'Quote Request'. Click 'New Material Quote Request'.	
Name	<Your initials> Supplier training quote <u>Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training.</u>
Supplier	Choose from the drop-down list (Optional)
Add materials	Click 'Add materials' (do not click '+ New material in the left corner). Select/highlight a least 5 materials. Click '+ Select items'. Then click 'Save request'.
Obtain supplier pricing	
<i>At this point, you would normally send the quote request to your supplier to fill in and send back. In this training activity you will act as the supplier by adding pricing.</i> Go to the 'Material Quotes' sub menu. Click 'Quote Request'. Select the quote you just created. Click 'Download'. Open the Excel file and fill out the prices. Save the Excel file on your computer.	
Import your supplier's quote	
Go to the 'Material Quote' sub menu. Click 'Import Quote'. Choose the saved material quote spreadsheet from your computer and attach. Click 'Import quotation'. Select 'Edit' to change the quote name as per your original quote request which was <Your initials> Supplier training quote. <i>Note - an imported quote will always be called 'Imported quote', therefore the name needs to be changed to something relevant.</i> Choose a supplier from the list. Set the date + expiry date. Choose your 'All' projects from the list. Click 'Save quote'.	



Activity 7

Duplicate a quote and add a % increase

In this activity you will duplicate an existing quote and inflate the pricing by 2%. This function is used if your supplier increases their price by a flat % or if you have negotiated a % discount on a quote.

Click the material quote you previously imported from the list.
Select 'Edit'.
Scroll to the bottom of the page and click 'Duplicate with modifier'.
Name the quote - <Your initials> Supplier training quote (2% increase).
In the 'Modifier' section type '2' for a price increase of 2% (you do not need to add the % symbol).
Save.

If you have time...

Labour quotes work in the exact same way as material quotes. If you have extra time, replicate the activities you have just done but for labour. Follow the same steps but go to the back 'Resources' menu and click the 'Labour quote' sub menu instead. Do the following:

- Create a labour quote manually by clicking '+ New labour quote' (as per activity 5).
- Create a quote request, add pricing and import it (as per activity 6).
- Duplicate a quote and add a % increase.



Activity 8

Set up a project

From the main black menu, select 'Projects'.
Click 'New project'.

Add the
name

<Your initials> Training project

Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training.

Fill in the form.

Select at least two work packages.

Save your project.

Once saved, you will be in the project home page.



Session 2

Activity 1

Create a new product template

From the main black menu, select 'Resources'.

You will be in the 'Product templates' submenu.

Click '+ New product template'.

Fill out the details below.

Name	<Your initials> Wall Type 1 2700mm high <u>Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training.</u>		
Quantity unit	Linear metre(s)		
Package	Pick from the drop-down list		
Product description	2x 15mm Soundbloc either side of 70 C Stud with resilient bars to 1 side, 50mm APR insulation and skim finish to 2.7m high.		
Pricing notes	20% waste allowed on studs to include for openings, abutments, tees and angles. Beads and ancillaries allowed for in contingency. Skim allowed full height.		
Add components			
Component 1			
Component name	Deflection Head & Studs	Contingency budget	£1
Materials	72mm Deep Channel - 72 DC 60 - British Gypsum Quantity - 1 Wastage - 10%		
	72mm Standard Channel - 72 FEC 50 - British Gypsum Quantity - 1 Wastage - 10%		
	Resilient Bar - RB1 - British Gypsum Quantity - 5 Wastage - 10%		
	19mm Coreboard (598x3000) - 19mm SE - British Gypsum Quantity - 2.7 Wastage - 10%		
	Gyproc Firestrip - 3.6m roll - British Gypsum Quantity - 2.7 Wastage - 10%		
	70mm C Stud - 70S50 - British Gypsum Quantity - 4 Wastage - 20%		



Labour	Deflection Head Detail		
	Quantity - 1		
	C Studs @ 600mm centres		
	Quantity - 2.7		
	Resilient Bars		
	Quantity - 2.7		
Component 2			
Component name	1st Fix Boarding	Contingency budget	£1
Material	15mm Soundbloc - 15mm TE - British Gypsum		
	Quantity - 5.4		
	Wastage - 5%		
Labour	Plasterboard per skin (walls)		
	Quantity - 5.4		
Click 'Save product'.			

Activity 2

Create a new product, using an existing template

Select the 'Wall Type 1' template you just created.

Click 'Edit'.

Change the name to 'Your initials Wall Type 2'.

Click 'Save as new'.

Repeat this process and create another template called 'Your initials Wall Type 3'.

You will use these three products later in your training.



Activity 3

Create a baseline assessment

1. Create your assessment

Go to 'Projects' in the black menu.
Select your project.
Select a relevant work package.
Click '+ New assessment'.
Name it 'Baseline spec' then click 'Create'.
Click 'Start assessment'.

2. Create your rate build up

Go to the 'Rate build up'.
Click '+ Add product' button in the bottom left.
Select the 3 product templates you created – Wall Type 1, Wall Type 2 and Wall Type 3 .

3. Create your bill of quantities

Click 'Bill of Quantities'.
Click the 'Add Zone' button in the bottom left.
Click 'Create multiple zones'.
Number of zones: 5.
Zone name prefix: Floor.
Click 'Create multiple zones'.
Add generic quantities for the zones.
When the assessment is duplicated, these quantities can be changed for the specific job.

Note: If creating zones one at a time, make sure that zone names are consistent e.g. do not use 'First floor' and then '2nd' floor'. Chalkstring will use these names for searches and exports.

4. Use the product & component menus

Go to the rate build up.
Choose any product and using the menu on the right side, click 'Move product' and relocate the product in the rate build up.
Click 'View & edit product' - the product will open.
In the component, using the menu on the right, reposition your component.
Then rename it and click 'Save'.



Activity 4

Price your assessment

1. Duplicate the assessment

Select your project, click on the relevant work package and click on your 'Baseline spec'.
In the 'Assessment overview', click 'Assessment Actions'.
Select 'Duplicate'. The assessment name should now have '(copy)' next to it.
Go to 'Assessment configuration' and select the 'cog' icon.
Rename the assessment <Your initials> Pricing option 1 and click 'Save'.
Click 'Package assessments' and you will see two assessments – the one you just created & your baseline spec.

2. Set overhead and profit percentages (OHP) across the whole assessment

Go to the rate build up in your new 'Pricing option 1' assessment.
You will see the products from the original assessment listed.
Go to 'Assessment actions', 'Apply to all'.
Set the OHP:

Overhead - 12%
Profit - 20%
Inflation 3%
Click 'Apply to all'.

3. Apply material & labour quotes

Materials
Click 'Materials'.
Click 'Apply quote'.
Select the quote that has the most total 'matching materials'.
Click 'Apply'.
Refresh your browser.
Repeat for labour.



4. Add 'Guesstimates'

For any items that have no applicable quotes, add guesstimates with a supplier.

View & edit the product.

Select 'Edit' for the item missing a price.

Choose '+new Guesstimate'.

Enter the price.

Choose a supplier (for a material) or region (for labour).

Save and apply the Guesstimate.

Click out of the product, back into the rate build up.

Click 'Materials' and review your total material budget and see which suppliers you are using.

5. Edit the assessment wholesale

Click 'Materials' and swap a material for another one.

Note: this will change the material in ALL the products across the assessment.

Click 'Materials' and swap a supplier price for another one or add a guesstimate.

Note: this will change the supplier & price for that material in ALL the products across the assessment.

6. Edit individual products

Click 'View & edit' a product.

In the top left, note the price of the product.

Swap a material by clicking the pencil icon. If it has no price associated with it, add a 'Guesstimate'.

Swap the price for a material by clicking the pencil icon.

Note the change in the product price – click on the product price for full commercial breakdown.

7. Add fixed costs / prelims

Go to 'Fixed costs'.

Select the Scissor lift from the drop-down.

Type the quantity needed.

Note: The rate will be updated automatically based on the quantity added.

Type the period length it is needed for e.g. 6 (weeks).

The profit is automatically updated but can be changed here if needed.

Click 'Save'.

The fixed cost will now appear at the top with a total cost.

8. Review the commercials

Select the 'Assessment overview' sub menu.

Review the 'Assessment summary' section on the right.

Expand the arrows for measured costs, fixed costs and Overhead and profit.

Hover over the costs and view percentages.

Expand the measured costs and view the breakdown.

View the package price.

Export a draft bill

Within the 'Assessment overview'.

Click the 'Assessment actions' button.

Export a draft bill for either:

- Draft Material bill - *This itemises all of the key material requirements. Useful when establishing a logistics plan.*
- Draft Labour bill - *This itemises all of the key labour activities by trade, quantities and zones. Useful to understand labour requirements to produce a labour histogram.*
- Draft Tender bill - *A preview the full tender as it stands to date.*



Activity 5

Generate & add a project-specific quote

1. Create your quote request

Go to your training project.

Select the package and your 'Pricing option 1' assessment.

Go to 'Assessment Actions'.

Select 'Generate material quote request'.

Note: This will automatically download with a quote request for all the materials contained within the rate build up.

2. Obtain supplier pricing

At this point, you would normally send the quote request to your supplier(s) to fill in and send back. In this training activity you will act as the supplier by adding pricing.

Open the downloaded spreadsheet and fill out the price field.

Save the Excel file on your desktop and give it an appropriate name.

3. Import your supplier's quote

Go to the 'Resources' menu.

Click the 'Material Quote' sub menu.

Click 'Import Quote'.

Choose the saved material quote spreadsheet from your computer and attach.

Click 'Import quotation'.

Select 'Edit' to change the quote name to reflect the supplier and project. *Note - an imported quote will always be called 'Imported quote', therefore the name needs to be changed to something relevant.*

Choose a supplier and project the quote relates to.

Set the date + expiry date.

Click 'Save quote'.

4. Apply the quote

Navigate back to the rate build up in your project.

Click 'Materials'.

Click 'Apply quote' and select your quote. Click apply.

Refresh your browser and your pricing will update.



Session 3

Activity 1

Measure with Takeoff

1. Prepare for this activity

You will need to create a rate build up and blank bill of quantities for this activity.

Navigate to your training project & the relevant package.

Click '+ New assessment'.

Name it 'Takeoff'.

Go to the rate build up.

Add the following products:

- MF ceiling
- Wall type 1 take off
- Wall type 2 take off
- Single door opening

Do not price the rate build up.

Go to the bill of quantities.

Click 'Add zones'.

Click 'Create multiple zones'.

Add 3 to the 'Number of zones'.

And type 'Level' into the 'Zone name prefix'.

Click 'Create multiple zones'.

Your bill of quantities will now show 4 products and a zoning structure showing Levels 1-3



2. Import a drawing

You will need to use the corresponding drawing called 'Levels 1-3'. Have this saved locally on your computer.

You will need the documents below saved locally on your computer.

1. [Levels 1-3](#)

Click 'Takeoff'.

Click 'Drawings list'.

Select 'Upload drawings'.

Select your training project from the drop-down.

Drag and drop or browser and locate the drawing on your computer.

Click 'Upload drawings'.

Assign the package assessment to the 'Takeoff' assessment.

Under 'Zones' select Levels 1, 2 + 3 *Note: This links your drawing to all 3 zones therefore the measures will populate in the bill of quantities.*

Click 'Upload drawings'.

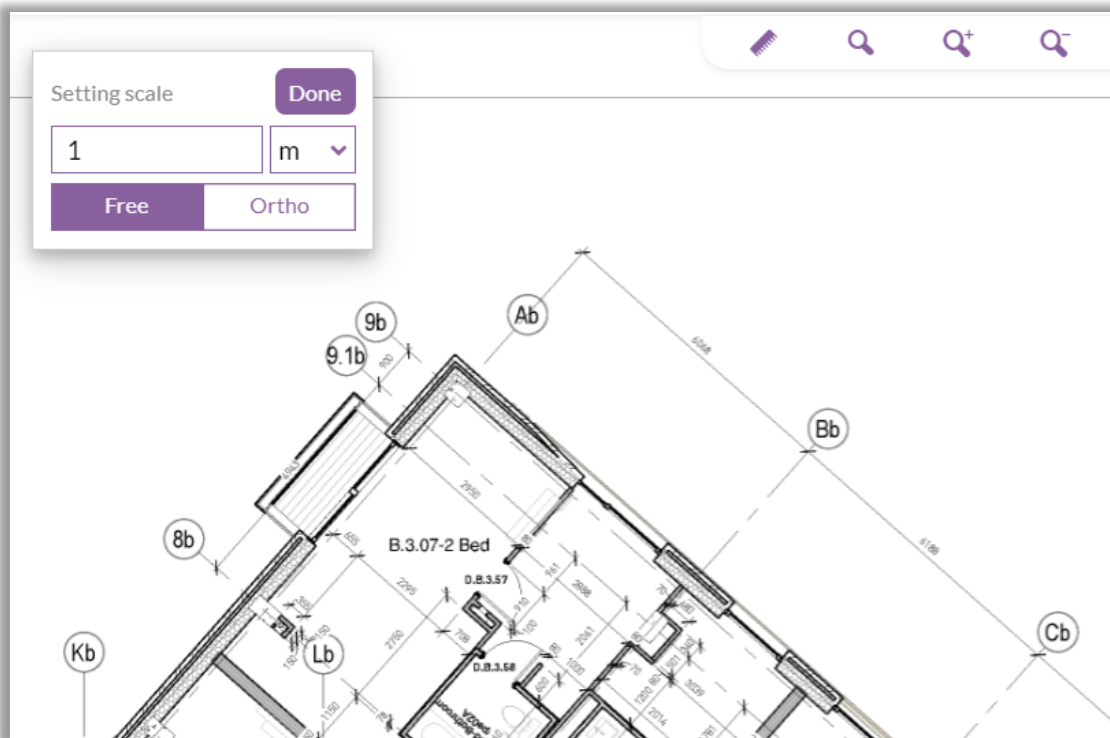
You are now taken to the takeoff interface.



3. Set scale & add products

Set scale

Zoom into the top of the drawing - using your mouse wheel or zoom icons – as per the drawing below. Draw a line from Bb and Cb and set the scale at 6.1m, then click 'Done'.



Add products

In the left pane, click '+'.

Click 'Add product from assessment'.

Select MF ceiling.

Select a colour.

Set the 'Type' as 'Area'.

Click 'Add product'.

In the left pane, click '+'.

Click 'Add product from assessment'.

Select Single door.

Set the 'Type' as 'Count'.

Click 'Add product'.

Repeat for Wall Type 1, setting the 'Type' as line.

Repeat for Wall Type 2 setting the 'Type' as path.

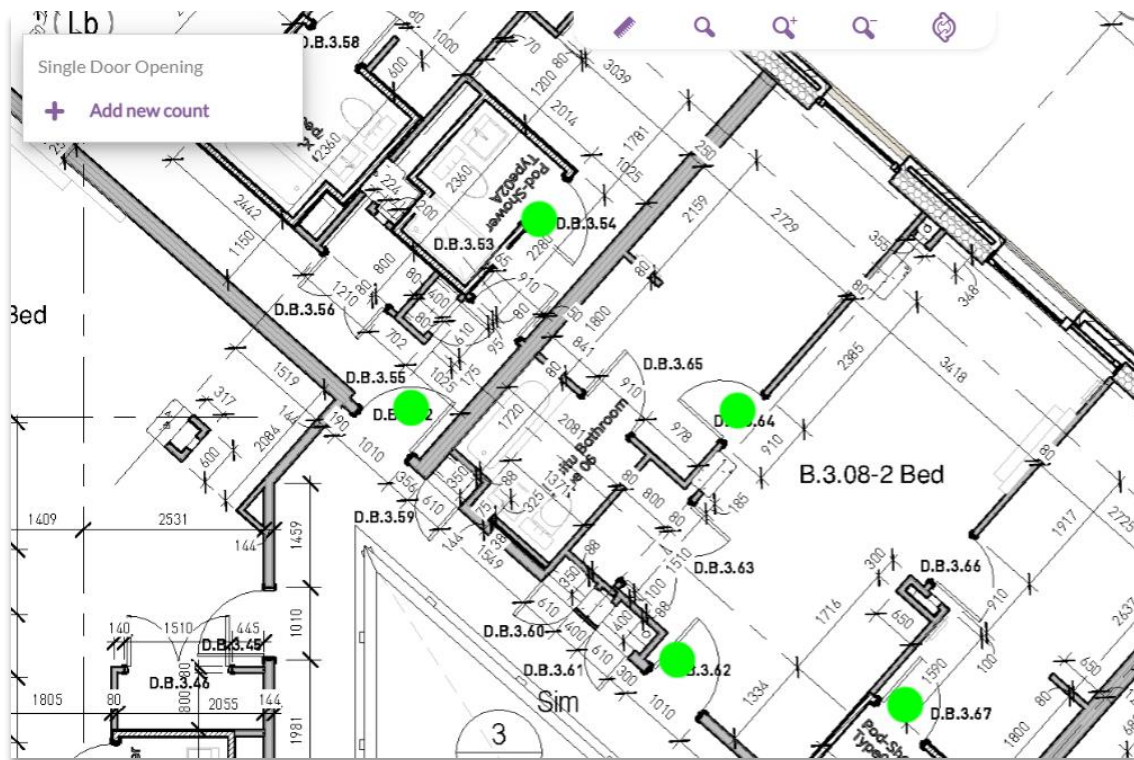
5. Count

Click the single magnifying glass icon and see the command 'Reset zoom' appear. Click it.

This will reset your drawing

Go to the 'Door' product and click the '+' button.

Zoom into the top of the drawing.



Click on 5 doorways to count doorways.

The counts will appear in the left pane.

8. Comments and sketches

Click the 'Markup' submenu in the top left.

Click 'Add comment'

Click on the drawing where you want to add a comment.

Enter the details in the comment box. E.g. 'Further clarification required'.

Click 'Done'.

Click 'Add sketch'.

Select a colour and line thickness from the drop-down menus.

Using your mouse, draw a sketch on the drawing.

Click 'Done'.

9. Review measures in the bill of quantities

Click the 'Bill of quantities' icon in the top right.

The bill of quantities now appears showing your measures.

Hover over the blue cells to see how they are linked to Takeoff.

Activity 2

Import client bills (scope, export / import)

This activity is dependent on the type/structure of client bill your business typically handles. Your trainer will advise you as to whether you should do activity 2 or 3. You need not do both. Activity 2 is the preferred method if you have between 51-1000 zones (with no subzones) in your client bill.

1. Prepare for this activity

You will need the documents below saved locally on your computer.

1. [Scope structure only import \(training\)](#)
2. [Main zone quantities to paste \(training\)](#)

2. Create a new assessment

Navigate to your training project & the relevant package.

Click '+ New assessment'.

Name it 'Client bill import'.

Click 'Start assessment'.

Note: The bill import must be done in a new assessment.



3. Import the bill

In the 'Assessment overview', click the 'Assessment actions' button.

Choose 'Import Client Bill Template'.

Import the spreadsheet called 'Scope structure only import (for training)'.

This is a spreadsheet which contains just the project scope and has no quantities.

All the products imported from the spreadsheet are now listed in the rate build up. However, they do not contain any component information and must be replaced with a product template from the central database.

4. Replace products in the rate build up

Go to the 'Rate build up'.

Add OHP percentages for the whole assessment and click 'Save'.

Refresh your browser.

For each product, go to the 'Product menu' and choose 'Replace product'. *This will take you to the central product templates database from which you can select a product..*

Select a product from the list that corresponds with the imported product.

If there are none that match correctly, don't worry. You're simply learning the principles of replacing products, so select the closest match.

Refresh your browser.

Repeat this process until all the 'Empty product – must be replaced' flags have disappeared.

You will see there are red flags warning you there are no material or labour prices – you have learned how to price the assessment in a different session, so we will not price this now.

5. Create zones & export your bill structure

You will now create and download the zone structure, before importing the quantities.

Add zones

Go to the Bill of quantities and click the 'Add zones' button.

Choose 'Create multiple zones'.

Enter the number of zones as '5'.

Enter the zone prefix as 'Block'.

Click 'Create multiple zones'.

Export the bill structure

Click the 'Export' button in the top right corner. This will export the zone structure into an Excel spreadsheet (enable editing in the spreadsheet and save it to your desktop).

Paste quantities into the downloaded Excel

Open the spreadsheet called 'Main zone quantities to paste (training)'.

Copy the quantities for each zone and paste into the bill spreadsheet you just exported.

Save the changes.

NOTE: If using sub zones, only copy and paste sub zone quantities. Main zones will be greyed out and cannot be amended, however the main zone will automatically calculate the total of the sub zones.

6. Import quantities

Back in Chalkstring, in the bill of quantities page, click 'Import'.

Import the saved spreadsheet containing the updated quantities.

The bill of quantities will now be populated with all the quantities from the spreadsheet. Note they are showing as green, telling you the measures originate from the export/import process.



Activity 3

Import client bills (zones & quantities)

If you have completed activity 2, you need not do activity 3. Activity 2 is the preferred method if you have a client bill of up to 50 zones (with no subzones) and quantities.

1. Prepare for this activity

You will need the documents below saved locally on your computer.

1. [Scope & zones for training](#)

2. Create a new assessment

Navigate to your training project & the relevant package.

Click '+ New assessment'.

Name it 'Client bill import'.

Click 'Start assessment'.

Note: The bill import must be done in a new assessment.

3. Import the bill

In the 'Assessment overview', click the 'Assessment actions' button.

Choose 'Import Client Bill Template'.

Import the spreadsheet called 'Scope & zones for training'.

This is a spreadsheet which contains just the project scope and quantities.

All the products imported from the spreadsheet are now listed in the rate build up. However, they do not contain any component information and must be replaced with a product template from the central database.



4. Replace products in the rate build up

Go to the 'Rate build up'.

Add OHP percentages for the whole assessment and click 'Save'.

Refresh your browser.

For each product, go to the 'Product menu' and choose 'Replace product'. *This will take you to the central product templates database from which you can select a product.*

Select a product from the list that corresponds with the imported product.

If there are none that match correctly, don't worry. You're simply learning the principles of replacing products, so select the closest match.

Refresh your browser.

Repeat this process until all the 'Empty product – must be replaced' flags have disappeared .

You will see there are red flags warning you there are no material or labour prices – you have learned how to price the assessment in a different session, so we will not price this now.



Session 4

Activity 1

Value engineer by changing the specification & pricing

Duplicate the assessment called 'Pricing option 1' that you created earlier and rename the duplicate 'Pricing Option 2'.

Go to the rate build up and make specification-based changes to your products as per the below.

Swap a material e.g. change brands from BG to a different brand using the 'Material' button at the top of the rate build up.

Note: If a material swapped is here, it will apply to all products in the rate build up. If you wish to make a change to one product, select the product and make the change there.

Apply a new quote and or guesstimates (that are cheaper than the original).

View the assessment overview and the package price.

Go to the 'Package assessments' page. Select 'Pricing option 1' and 'Pricing option 2' and click 'Compare selected'.

Note: You may wish to value engineer by obtaining more competitive quotes. Simply duplicate your assessment, import the cheaper quotes, and apply to the appropriate assessments it in this instance.



Activity 2

Value engineer by changing the commercial expectation

Duplicate the assessment called 'Pricing option 1' that you created earlier and name the duplicate 'Pricing Option 3'.

Make changes to the OHP percentages.

Fix a price for one of the products so that it is slightly cheaper than the original by clicking on the padlock symbol.

Go to the 'Adjustment' menu and add a main contractor discount of -2%, ensure this is disclosed to the client.

Go to the 'Package assessments' page.

Select 'Pricing Option 1' and 'Pricing Option 3' and click 'Compare selected'.

Activity 3

Create a tender & accept it onsite

1. Mark the assessment as 'complete'

Go to the 'Assessment overview' for 'Pricing Option 1'.

Review the 'Assessment summary' and package price.

When happy to proceed with the tender:

Go into the rate build up and click 'Mark as complete'.

Go to the bill of quantities and click 'Mark as complete'.

Go to fixed costs and click 'Mark as complete'. *Even if you have no fixed costs, you must still mark this section as complete.*



2. Create the tender

In the project homepage, go to 'Create Tender' on the right side.

Tick the box for the assessment and click 'Create tender' - *the assessment will now be available in the 'Tenders' section.*

Click 'Generate bill & cover letter' - *This will take you to the tender page.*

In 'Tenders' above, click 'Generate bill & cover letter'.

Click 'Generate bill & cover letter' in the top right.

Fill out the details for the tender documentation and click the 'Submit tender'.

In the 'Tender documents' section, download and view the tender documents.

At this stage you would email these documents to your client. Let's assume the tender has been agreed and secured by the client.

3. 'Accept' the tender onsite

In the project home page, go to 'Tenders' section on the right.

You can see which tenders have been submitted. Click the arrow.

Click 'Accepted'.

Go to the project home page and click 'Project Hub'.

This will take you to the Project Hub and the blue menu for onsite projects.

Activity 4

Post tender review

1. Change the 'Assessment configuration'

Go to the 'Projects' page in the black menu and search for your training project.
Click 'Project Hub'.
Click on 'Pricing Option 1'.
Change the name of the assessment to 'Block A' i.e. something your client would understand.
Change the contract type to either remeasure or lump sum.
Change the document format to one of the other options, this will change the format so try the different options to best suit yourself and your client.
Set the 'Materials Onsite'.

2. Re-cost the assessment

Go to the 'Assessment overview' and click 'Assessment actions'.
Click 'Generate material quote request' and view the downloaded spreadsheet.
Add some cheaper prices to the spreadsheet and save it to your computer.
Replicate the quote workflow you've learned previously (see activity 6 for a reminder) i.e. In Chalkstring > Resources > material quote > import the quote from your desktop > rename accordingly.
Apply the cheaper quote for materials to the assessment.
Add some cheaper labour rates, by adding some cheaper Guesstimates.
Go to the 'Assessment Overview' to see how these changes impact the project.

Like with the previous Value Engineering activity, you could also swap out branded materials for unbranded and make specification changes. You could also swap out labour activities.

3. Remeasure the assessment

Go to the Bill of Quantities section in the assessment.
Change quantities to reflect what is required onsite.
Go to the 'Assessment Overview' to see how these changes impact the project.



4. Add a variation using contract rates

From the blue menu, select 'Project Hub'.

Click your assessment that you want to make changes to.

Go to the rate build up section and click 'Add product'.

Select a product and add it to the rate build up as your variation.

Price the variation by adding quotes/cheaper prices or guesstimates.

Export the rate build up – *at this point you would normally select the variation and send this to your client and wait for instruction.*

For the purpose of the training activity, act as the client and agree a price for the variation.

In the product, click the white padlock to fix the price as agreed with your client.

Type in the price and update.

Go to the bill of quantities.

Add quantities for the variation.

Go to the 'Assessment Overview' to see how these changes impact the project.



Session 5

Activity 1

Maximise margin on new scope variations

We reviewed variations based on contract pricing previously. The following activities take handling variations to the next level, whereby you'll see how you can maximise margin on VOs and how to handle non-billable VOs.

1. Prepare for this activity

Click 'Projects' in the black menu.

Go to your training project, then to your package and create a new assessment called 'Variations'.



2. Price the variation in the offsite assessment

Navigate to the 'Assessment' (you just set up) called 'Variations' and go to the 'Rate build up'.
Click 'Add Product'.
Click 'Add new product template'.
Create the variation product as detailed below.

Name	<Your Initials> Training – Dayworks <i>Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training</i>
Package	Variation (If available, select another if not)
Product description	N/A
Quantity unit	Day(s)
Component name	Dayworks
Contingency	0
+ Labour activity	Training – dayworks
Quantity	1 day per day

Add the product to the rate build up.
Set the OHP at 0 25 0 and refresh your browser.
Go to the 'Product menu' for the variation and choose 'View & edit product'.
Go to product actions and choose 'Edit name & description'.
Change the name to '<Your initials> - VO1 Training – Dayworks'.
In the description add 'Making good plasterboard'.
Click 'Save'
Add 3 to the quantity, so that you are telling Chalkstring the works last 3 days.
Apply labour pricing by clicking 'Labour' at the top of the rate build up.
Click 'Apply quote'
Select the quote called 'Training High quote'.
Click 'Apply'.
Refresh your browser.

Now review your product and you should see the following:

Cost price £288

Adjusted price £360

25% mark up on cost

From the rate build up, click the 'Export' button to export the variation to send to your client for instruction.

Your client has agreed to the price of the variation at £325. At this stage do not do anything with this price but be aware. They have issued you a site instruction reference of 121.



3. Add the variation product to the central database

You will need to add the variation to the central database as follows:

In the rate build up, go to the 'Product menu' for the variation and choose 'View and edit product'.

Click the 'Product Actions' button and select 'Edit name & description'.

Change the name of the variation to: '<Your initials>- SI 121 - VO1 Training – Dayworks'.

From the 'Product Actions' button, click 'Sync with database' and select 'Create new template'. Click save.

This will save the product to the central database, so that the variation can be used on multiple projects.

Once the job has been secured and you have accepted the tender onsite in Chalkstring, you can add the agreed variations to the live project, but use cheaper quotes to maximise on margin.



4. Add the variation product to the live, onsite project

Navigate to the 'Projects' page via the black menu.

Click the 'Project Hub' button for your project, this will take you to the blue menu.

Click on your assessment to add the variation to.

Go to the rate build up section and click 'Add product'.

Use the search / filter to find the variation you set up – 'Your initials - SI 121 - VO1 Training' and click to add it to the rate build up.

Price the variation in the product by clicking 'Edit' icon in the 'Quote' section of the product.

Select the quote named 'Training – Low quote'.

For the variation product, click the white padlock and fix the price as agreed with your client - £325.

If you now compare your mark up on cost at tender stage you'll see an increase.

At tender stage you saw the following:

Cost price £288

Adjusted price £360

25% mark up on cost

On your live job, you now see:

Cost price £225

Adjusted price £325

44.44% mark up on cost

You have increased your mark up on cost by 19.44%. If you could achieve this for ALL your variations, you would see significant margin gain across your project.

The final step is to add your quantities to the BoQ – go to the 'Product actions' menu and select 'Show bill of quantities' and enter the quantity of 1 in the first zone.



Activity 2

Add a non-chargeable variation

A variation can also be added for non-recoverable or non-billable items. This enables you to account for the cost in your project, to procure the relevant materials/labour and for progress to be updated accurately.

From the blue menu, select 'Project Hub'.

Click your assessment.

Go to the rate build up section and click 'Add product'.

Use the search / filter to for the product variation <Your initials>Training - Dayworks and add it to the rate build up.

Go to the 'Product actions menu and rename the product '<Your initials>- Non-billable 01 - Training - Dayworks'.

Add 1 day as your quantity.

Price the variation using the 'Training - Low quote' price from the database.

You can export the rate build up and send it to your client if you wish. This is not necessary and is at your discretion as, in some circumstances, the non-billable may be for something you don't wish to disclose to your client.

Now you've applied pricing, you will want to make the product £0 as you are not passing on a charge to the client.

Click the white padlock and fix the price as £0 (zero).

Go to the bill of quantities and add a quantity of 1 to Floor 1'. Your project will now update to reflect the variation.

If you go to the 'Assessment overview' you will see the commercials relating to your variations.

Activity 3

Add project roles

From the blue menu, go to 'Project Roles' menu.

Add users to the following roles - 1 Estimator / 1 Surveyor / Site Manager.

Add 1 subcontractor.

Add 1 operative.

Click 'Save project roles'.



Activity 4

Create an issue in takeoff

1. Create an issue in takeoff

Go to the main projects menu and select the project called 'Takeoff project'.

Navigate to 'Takeoff' in the main blue menu on the left (not to the work package named Takeoff)

Click on the drawing 'Levels 1-3'.

Select the 'Issues' menu in the top left and click '+'.

Select 'Create new issue'.

Complete the form, clicking 'Snagging' as the issue category and the 'Summary' as poor workmanship.

Click 'Save issue'.

Drop a location pin on the drawing to identify where the issue is by clicking on the correct place on the drawing.

Click 'View issue'.

Leave a comment.

Click 'Resolve this issue'.

Activity 5

Add an external cost

Go back into your own training project and navigate to the Project hub.

Go to the 'Costs' menu and add the following:

Click '+ New cost' and add a new cost called HP52n Printer.

Fill out the details and add this cost to the relevant budget(s).

Save the cost.

Expand the blue menu and select the 'Projects' menu from the bottom of the list.

Go to the 'Accounts' menu.

Click the 'External costs' sub menu.

Find your cost using the filters.



Session 6

Activity 1

Ordering materials

1. View the bill & swap quotes

From the main blue menu, select 'Materials'.

Go to the 'Material bill' sub menu.

Select your relevant work package.

Click the 'i' button in the following areas to view information:

Package totals - what is the projected materials budget for this package?

Zones - what is the projected materials budget for this zone?

Material - how much of this material has been used / progressed? What is the remaining balance?

Click the 'i' button for a material:

View the supplier.

Change the price for the material by choosing an existing quote or add a guesstimate.



2. Add items to an order

Click the + button in the following areas to place an order:

Individual material by zone

Search for a material.

Click the + button for the material.

Add the quantity you want to order.

Click 'Add to order'.

Repeat for other materials by zone.

Bulk order by zone (%)

Click the + button for the zone.

Add the percentage amount you want to order from the remaining balance. (If you want to order ALL the materials in the zone, type 100%).

Click 'Add to order'.

Bulk order a material across many zones

Search for a material.

Click the + button for the material.

Add the quantity you want to order or the full remaining balance.

Click 'Add to order'.

3. Add contingency items

You can use contingency if you need to overorder on an item or if an item is not in your scope.

Overspend

Search for a material.

Click the + button for the material.

Add a quantity which is more than the remaining balance.

Click 'Add to order'.

A negative, red balance will show as an overspend.

New contingency item

Click the '+ contingency material' button in the bottom left.

Add a contingency item from the material database e.g. high viz jacket.

Select the work package the material relates to, add the price or guesstimate and click 'Save'.

Click 'Add'.

Filter the bill to find the contingency material.

Use the '+' button for the contingency material to add it to an order.



4. Create a draft order and confirm the order

Draft order

Go to 'Draft orders' to see a list of all orders.

Click into an order.

Click the 'Edit' button.

Change the quantity of a material in the order.

Add another material to the order.

Add a delivery location.

Click 'Save'.

Click back on the 'Draft order' menu and choose the same draft order, the new quantity and material has been updated.

Confirm order

Click on the order and click the 'Confirm order' button.

Check and update the delivery date.

Add new or update the delivery address details.

Check the 'Order items' and update the rounding option to suit the item.

Click 'Confirm order'.

The status for the order is now 'Held'.

Click 'Download draft order' and add some order notes. E.g. deliver to back gate.

View the downloaded order spreadsheet.

In Chalkstring, click the 'Mark as sent' button. The status for the order is now 'Sent'



Activity 2

Log deliveries

Delivery schedule

Go to the 'Delivery schedule' sub menu.

Make a note of an order number.

Click 'Export schedule'.

View the spreadsheet details.

Log a delivery

Go to 'Open orders' sub menu.

Click your order.

Click the 'Log delivery' button.

Check the delivery date.

Upload a document or picture ([click here to download an example delivery note](#)).

Assume that all materials have been delivered on time and in full

Click 'Delivered in full'.

Click 'Update delivery totals'.

The status of the order is now 'Fulfilled'.

Activity 3

Process a material invoice

1. Attach an invoice

Once an invoice has been sent to you from your supplier, it's a quick process to add the invoice information in Chalkstring.

Click on the order.

Click the 'Attach invoice' button.

Type in the invoice reference and value.

Upload a copy of the received invoice ([click here to download an example invoice](#)).

Click 'Save invoice'.

The status of the invoice will be 'review'.



2. Query an invoice

Click on the sub menu 'Invoices' in the 'Materials' menu.

Click on an order.

Go to the 'Raise query' section and type details of the query.

Click 'raise query'.

Click back into the 'Invoices' sub menu and the status of the invoice will be 'query'.

3. Accounts filter & export

Navigate to the black menu.

Navigate to the 'Accounts' menu, go to the 'invoices' sub menu.

Search for the and click on the queried invoice, it will be flagged in orange.

Filter the list to find all invoices in 'query' and click 'Export current list'.

View the downloaded spreadsheet, you will be able to see the query notes.

In Chalkstring > Accounts > Invoices, click on the invoice and you will be back in the invoice/blue menu.

Resolve the query by adding a resolution note and click 'resolve query'.

You can now approve the invoice for payment.

4. Approve an invoice

For the invoice, check the invoice values.

In the 'Approve payment' section, type in the value to approve.

Click 'Approve for payment'.

The status of the invoice will be 'Approved'.



Activity 4

Order a fixed cost & process the invoice

1. Select items to order

From the blue menu, select 'Fixed costs'.

Go to the 'Fixed cost bill' sub menu.

Select the relevant work package.

Click the '+' button for the fixed cost.

Define the quantity, period, supplier, nominal code (you must have a nominal code set up in the 'Accounts' menu to be able to save the fix cost order in this process), rate, duration and click 'Add'.

The fixed cost now sits in 'Draft orders'.

2. Add a contingency fixed cost

Go to the 'Fixed cost bill' sub menu.

Select the relevant work package.

Click the '+ add contingency fixed cost' button in the bottom left.

Select the fixed cost from the list.

Choose the work package the contingency fixed cost relates to.

Add a profit value, or type 0.

Click the '+' button, complete the fields and click 'Add'.

3. Create a draft order

Go to the 'Draft orders' sub menu.

Click the relevant fixed cost order.

Click 'Confirm order'.

Check and update the delivery date.

Add new or update the delivery address details.

Check the delivery details and click 'Confirm order'.

Click 'Mark as sent'.

4. Open orders & adding an invoice

Go to 'Open orders'.

Download the order.

Attach an invoice to the order and approve it.



Session 7

Activity 1

Log progress

1. Log progress by product

From the blue menu, click on 'Progress'.

You will be taken to the 'Progress by product' page.

Choose a relevant work package.

Filter the list by zone.

Click the 'i' button for any product to view its details - what is the rate for this product?

Log progress

Click the + button for a product.

View the product components.

Use the slider to log progress for each component.

View the Total value figures - what is the current progressed value for the whole product (blue value)?

Click 'Save changes'

Repeat for several other products and zones.

Click the 'Export progress data' button in the top right to download a progress report into Excel.

Open the downloaded spreadsheet to check how the exported progress is displayed.

2. Create & log progress by 'Groups'

Select the 'Progress group' sub menu and choose 'Create or edit groups in the top right'.

Click the '+' button in the top right to create a new progress group.

Name and colour the group e.g. 1st fix.

Choose a work package from the drop-down list.

Press 'Select' for the group you just created.

Click on the components that you want to add to this group. E.g. the '1st fix' components.

When this is complete, click 'deselect' for the group.

Add another progress group e.g. '2nd fix' and select the remaining components that were not added to the 'First fix'

Ensure all components in your products which you have chosen to group are selected and part of a group. Once you have started to group up a product, all the components must be added to a group. You cannot have a product where only some of the components are part of a group. Don't worry if the example doesn't quite match reality - you are simply learning the principles of progress grouping.

Click on the main 'Progress group' submenu.

Choose your work package.

Use the + button to log progress for the group.



3. Log progress for a fixed cost

Go to the 'Fixed cost progress' sub menu.
Choose a work package.
Update the 'Quantity completed' area for the fixed cost.

4. Review the progress map

View the 'Progress Map' submenu for an overview of current progress on the project.
Drill down to view the values for both package and zones by clicking on them.



Activity 2

Process labour applications

1. View the bill & swap pricing

From the main blue menu, select 'Labour'.
You will be taken to the 'Labour bill' sub menu.
Select the relevant work package.

View information

Click the 'i' button in the following areas to view information:

Package totals - what is the projected labour budget for this package? What is the Work in Progress (WIP)?

Zones - what is the projected labour budget for this zone? What is the zone Work in Progress (WIP)?

Labour activity - What is the balance of this activity?

Change information

Click the 'i' button for a labour activity:

View the quote for this activity by clicking the 'Edit' button at the bottom.

Change the rate for the activity by choosing an existing quote or add a new guesstimate.



2. Input a labour claim

Click the + button in the following areas to log a claim.

Individual activity by zone

Search for the labour activity.

Click the + button for the activity.

Add the quantity (of work completed).

Leave the rate as it is.

Click 'Add to application'.

Add some more claims for different activities and different zones.

Click 'Bill actions'.

Click 'Save Draft'.

Add an effective date and choose a subcontractor and click 'Save'.

Add a labour activity in bulk by zone (by %)

If a contractor claims that activities are completed, or some work has been done in a particular zone(s)

Click the + button for the zone.

Add the percentage of the remaining work in progress completed. (If the contractor has completed all the work, type 100%).

Click 'Add to application'.

Click 'Bill actions'.

Choose 'Save Draft'.

Add an effective date and choose a subcontractor and click 'Save'.

Add claims across many zones

If a contractor is claiming that an activity has been completed or some work has been done across multiple zones

Search for the activity.

Click the + button for the activity.

Add the quantity of work completed or the full balance.

Click 'Add to application'.

Click 'Bill actions'.

Choose 'Save Draft'.

Add an effective date and choose a subcontractor and click 'Save'.



3. Review & approve a labour application

Go to the 'Review applications' sub menu.

Select the relevant work package and zone to if you need to edit the application.

Find a claim and click on the magnifying glass to establish which package and zone the claim applies to.

Click the 'edit' button.

Edit a figure if there has been an overclaim and update the quantity to be the same as the 'Progressed' total.

Click the 'Approve' button.

4. Export labour reports

Navigate to the 'Previous applications' submenu and click the 'Export application' button. This spreadsheet can be sent as evidence of the claim and for approval to your subcontractor.

Navigate back to the 'Labour bill' submenu and select a package from the drop-down.

Go to the 'Bill actions' button and 'Export labour bill' to view information for the labour bill.

Activity 3

Generate an outgoing application for payment

1. Review the application preview

Before inputting applications for payment, make sure that progress has been accurately updated.

From the main blue menu, select 'Applications'.

You will be taken to the 'Outgoing application bill' sub menu.

Select the relevant work package.

Click the 'Preview outgoing application' to view the application if it were generated now.

2. Generate application

Click the 'Generate outgoing application' button.

Leave the presented options as the default and click 'Generate'.

After a short amount of time, the application will be appear in the 'Open applications' sub menu.

Click the 'Open outgoing applications' submenu.

The application you have created will be in a 'Held' status.

Click on the application to view details.

In the documents section, click on the application download to view the Excel spreadsheet.

In Excel, enable editing and view, amend the application (if required) so that it is ready to send to your client.

3. Certifying payment

Let's assume that you have emailed the application spreadsheet to your client and have now received the payment notice.

Go to the 'Open outgoing applications' submenu.

Go into the application and click the 'Mark as sent' button.

The application will now have an 'Approve payment' section at the bottom half of the page.

Let's assume you have now received the payment notice.

In the 'Approve payment' section of the page, add the effective date for the payment period.

Click the 'set approved as applied' button as a quick way of adding the amounts to be paid for 'Measured Work', 'Materials', 'Fixed cost'.

Scroll down and add some notes / attach a documentation to the application.

Click the 'Submit the certified figures' to approve the application.

4. Project forward / over claim

From the main blue menu, select 'Applications'.

Go to the 'Outgoing application bill' sub menu.

Select the relevant work package.

Manually adjust the application percentage to project forward by clicking the + button.

Update the percentage figures for the components to reflect the progress of the onsite job as if it were the end of the month.

Click the 'Generate outgoing application' button.

Leave the presented options as the default and click 'Generate'.

The application will be appear in the 'Open outgoing applications' sub menu.

Go through the same process above for submitting the application.



5. Fixed cost applications

Fixed costs are automatically included in your applications based on the progress recorded against them but can also be projected forward if required.

Go to the 'Outgoing application bill' sub menu.

Click the 'Switch to fixed costs' button in the top right corner.

Select the relevant work package.

Use the '+' button to input quantities for the application to reflect the onsite job as if it were the end of the month.

Click 'Add to application'.

Click the 'Generate outgoing application' button.

Leave the presented options as the default and click 'Generate'.

The application will be appear in the 'Open outgoing applications' sub menu.

Go through the same process above for submitting the application.

6. Reviewing data

To view how the application data impacts live project reports, navigate to the 'Project hub' from the blue menu.

View the 'Last Certified Application' pie chart. This chart reflects the revenue, cost and margin figures, as they relate to the most recent certified payment notice.

View the 'Applied vs Certified' table. This shows what had been applied for in applications (in black) and what has been logged as certified (in blue) in Chalkstring, to give an outstanding balance if what was certified was less than what you applied for. This also takes into account the materials on site that are being claimed for on applications.

Note, your figures will not appear realistic because you have used dummy data for quotes, not placed orders/paid labour as you would in the real-world.



Session 8

Activity 1

Understanding the 'Dashboard'

1. Dashboard analysis

From the main black menu, select 'Dashboard'.

Choose a project(s) from the drop-down list.

Hover over the pie charts and review project costs and revenues.

Scroll down the page to view the 'Margin' graph. This tracks the profitability of the project, month by month, comparing Actual (solid line) vs projected (dotted line).

Review the data table. If multiple projects have been selected, hover the mouse over a value e.g. Projected Revenue, and it will show a breakdown of projected revenue by project.

Click 'Export report data' to download the dashboard report to review project performance and metrics.

If there are any discrepancies in the figures and you want to investigate the project further, you will need to go into the live project and review the Project Hub.



Activity 2

Analysing charts & tables in the Project Hub

1. The project hub

Navigate the 'Project Hub' from the blue menu, click on and set the 'Start onsite' date and the 'Complete onsite' in the top left.

Package progress chart

View the 'Package Progress' charts and drill into the revenues and costs for each work package. Hover your cursor over the bars to see a popup of the values.

Click on the work package name under the bars to view both revenues and costs together.

Pie charts

The 'Tender projections' pie chart shows a breakdown of the costs as they were when you accepted the tender onsite. The 'Current projections' pie charts shows a breakdown of the costs based on your current live assessments with any changes made after the project was taken on site, including any variations added to the project.

Hover your cursor over the sections of the pie chart to see additional information on the different budgets.

Project tables

Navigate to the 'Projected costs' table to view the total cost for your project to date.

Click the 'Projected revenues' table to view the total revenue value for your project to date.

Navigate to the 'Projected vs current margins' table.

Compare the projected (black) figures against the current (blue) figures. Is the project currently running as planned?

The projected figures assume that everything will go exactly as you have allowed for through to the end of the project to calculate the figure shown.

The current figures track the actual profitability of the project in real time, based on the current level of site assessed progress and the current cost data.

If the projected and current figures are close to each other, this will suggest the project is running as planned to date.

Click the 'Actual & 'Accrued' costs' table and hover your mouse over the costs to see a breakdown of where accrued costs have occurred.

2. Deviation reports

Navigate to the 'Materials' section from the blue menu and click 'Bill actions' and export the material bill. Review spend versus tender on the deviation tab.

Navigate to the 'Labour' section from the blue menu and click 'Bill actions' and export the labour bill. Review spend versus tender on the deviation tab.



Activity 3

Accounts

1. Account menu

Navigate to the 'Accounts' section of the black menu.
Click on the 'Orders' submenu.
Filter the list of orders to display all orders with a status of 'Fulfilled'.
Click on an order and this will take you to the blue menu.
Click the 'Attach invoice' button.
Type in an invoice reference and value.
Upload a copy of the received invoice ([click here to download an example invoice](#)).
Click 'Save invoice'.
The status of the invoice will now be 'Review'.
Navigate back to the 'Accounts' section of the black menu and navigate to the 'Invoices' submenu.
Filter the list of invoices to display all invoices with a status of 'Review'.
Click on your invoice.
Enter the amount to pay in the 'Approve payment' section and click 'Approve for payment'.
Navigate back to the 'Accounts' section of the black menu and navigate to the 'Invoices' submenu.
Filter the list of invoices to display all invoices with a status of 'Approved'.
Let's assume the invoice has now been paid via your 3rd party accounting software.
Select the box on the right-hand side for your invoice and click 'Mark selected as paid'.
The status will now update to 'Paid'.

2. Filters

Navigate to the 'Accounts' section of the black menu.
Click on the 'Invoices' submenu.
Use the filters to filter the list to display approved invoices within the last month.
Click 'Export current list'.
View the downloaded spreadsheet to see the export of your filtered invoices.
Click on the 'Labour applications' submenu.
Filter the list to display applications for your training project and with a status of 'Approved'.
Click 'Export current list'.
View the downloaded spreadsheet to see the export of your filtered labour applications.
Reset the filter.



Activity 4

Accounts reports

1. Set up codes

Navigate to 'Accounts' in the black menu.
Click on the 'VAT Codes' submenu.
Click '+Add code' to add a new code for VAT e.g. <Your initials> VAT Code.
Complete the fields and click 'Save'.
Click on the 'CIS Codes' submenu.
Click '+Add code' to add a new code for CIS e.g. <Your initials> CIS Code.
Click on the 'Nominal Codes' submenu.
Add a code for a any trade, work package or material type. E.g. 1001.

2. Complete new fields

Navigate to the 'Contacts' section of the black menu.
Click on the 'Subcontractors' submenu.
Use the filters to find and click on a subcontractor.
Click the 'Edit' button.
Add an 'Account reference' for the client and save e.g. CHLK01
Navigate to the 'Projects' section of the black menu.
Click on your training project.
Click the 'Edit' button.
Add a 'Project Reference' and a 'Retention %' figure.
Click 'Save project'.

3. Accounts export

Navigate to 'Accounts' in the black menu.
Select the 'Accounts Export' submenu.
Click the '+' in the top right.
Click 'Yes'.
Read through the errors on the pop up window to help you to understand how Chalkstring displays missing the accounts items that are required to complete a successful account export.
Do not worry about correcting the errors at this stage, this can be done once you're using Chalkstring for your real projects.
When finished, click 'Close'.

If you have any questions and you need support to complete the any of the activities,
please raise a helpdesk ticket through the Chalkstring User Hub.

