



Training activities: Supply & fit

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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Supply & fit quotes

Activity 1

Add a new supply & fit quote

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

From the main black menu, select 'Resources'.

Click the 'supply & fit quote' sub menu.

Click '+ New supply & fit quote'.

Fill out the details below.

Name	<Your initials> Decorating quote 2022 <subcontractor name>. <i>Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training</i>
Subcontractor	Pick from the drop-down
Date of quote	Today's date
Quote expires	Next year
Project	Select 'All' (so that the quote applies to all your projects)

Add products to your quote

Click '+ Add products'.

Select/highlight at least 5 products.

Click '+ Select items'.

Add prices.

Click 'Save quote'.



Activity 2

Create a quote request & import your subcontractors pricing

In this activity you will create a supply & fit quote request, download it and pretend you are the subcontractor by adding pricing. You will then import this.

Create your quote request	
Go to the 'Supply & fit quotes' sub menu. Click 'Quote Request'. Click 'New supply & fit quote request'.	
Name	<Your initials> Decorating 2022 quote request. <u>Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training.</u>
Subcontractor	Choose from the drop-down list (Optional)
Add products	Click 'Add product'. Select/highlight a least 5 products. Click '+ Select items'. Then click 'Save request'.
Obtain subcontractor pricing	
At this point, you would normally send the quote request to your subcontractor to fill in and send back. In this training activity you will act as the subcontractor by adding pricing. Go to the 'Supply & fit 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 subcontractors quote	
Go to the 'Supply & fit quotes' sub menu. Click 'Import quote'. Choose the saved supply & fit quote spreadsheet from your computer and attach. Click 'Import quotation'. Select 'Edit' to change the quote name. E.g <Your initials> decorating quote subbie A. Note - an imported quote will always be called 'Imported quote', therefore the name needs to be changed to something relevant. Choose a subcontractor from the list. Set the date + expiry date. Choose your 'All' projects from the list. Click 'Save quote'.	



Activity 3

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 subcontractor increases their price by a flat % or if you have negotiated a % discount on a quote.

Click the supply & fit quote you previously imported from the list.

Select 'Edit'.

Scroll to the bottom of the page and click 'Duplicate with modifier'.

Name the quote e.g.- <Your initials> Decorating quote subbie A +2%.

In the 'Modifier' section type '2' for a price increase of 2% (you do not need to add the % symbol).

Save quote.



Supply & fit product templates

Activity 1

Create a new product template

<p>From the main black menu, select 'Resources'. You will be in the 'Product templates' submenu. Click '+ New product template'. Fill out the details below.</p>			
Name	<p><Your initials> Bedroom Dividing Partitions 1 (2700-3000mm) (S&F). <u>Please ensure you add your initials as a prefix, so that your training resource can easily be identified and removed after training.</u></p>		
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 3m 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	£0
Component 2			
Component name	1st Fix Boarding	Contingency budget	£0
Component 3			
Component name	2nd Fix Insulation & Boarding	Contingency budget	£0
Component 4			
Component name	Plastering	Contingency budget	£0
Click 'Save product'.			



Activity 2

Create a new product, using an existing template

Use the filters to search for and select the 'Bedroom Dividing Partitions 1 (2700-3000mm) (S&F)' template you just created.

Click 'Edit'.

Change the name to '<Your initials> Bedroom Dividing Partitions 2 (2400-2700mm) (S&F)'.

Click 'Save as new'.

Repeat this process and create another template called 'Change the name to '<Your initials> Bedroom Dividing Partitions 3 (2000-2400mm) (S&F)'.



Pricing up an assessment for supply & fit

Activity 1

Price your assessment

1. Duplicate the assessment

Select your project, click on the relevant work package and click you created previously, such as a baseline assessment or one that has been priced up before, but the spec needs changing.

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> Decorating - supply & fit (SBC A) and click 'Save'.

Click 'Package assessments' and you will see two assessments - the original and the duplicated assessment with the new name.

2. Convert rate build up to supply & fit

There are 2 ways that an assessment can be converted to supply & fit.

1. Click 'Convert all products to supply & fit' in the 'Assessments actions' menu at the top of the rate build up page to convert all products to supply & fit
2. Click 'Convert to supply & fit' from the product menu on the right-hand side for each product. This will convert individual products to supply & fit.

3. Set overhead and profit percentages (OHP) for the whole assessment.

From the rate build up page, click the 'Assessments actions' menu.

Click 'Apply to all'.

Set the OHP as follows:

Overhead - 0%

Profit - 20%

Inflation 0%

Click 'Update all'.



4. Apply a supply & fit quotes

Click 'Supply & fit.

Click 'Apply quote'.

Select the quote created in the 'Supply & fit quotes' activity above, or any other quote available.

Note: If no quote is available, follows the steps in the 'Supply & fit quotes' above to create one, ensuring it includes the products within the rate build up you are currently working on.

Click 'Apply'.

Refresh your browser.

5. Add 'Guesstimates'

For any items that have no applicable quotes, add guesstimates and select a subcontractor.

View & edit the product.

Select 'Edit' button under the product actions menu in the top right.

Choose '+New guesstimate'.

Enter the price.

Select a subcontractor.

Save to apply the Guesstimate.

Close the quote window by clicking the white x in the top right to take you back to the rate build up.

6. Add to the bill of quantities

The Bill of Quantities will already have the zone structure set up from the original assessment. You can make some additional changes.

Add quantities for each product/zone.

Click on the drop down arrow for one of the zones and choose 'Clone'.

Enter '2' in the 'Zone count' area.

For the first cloned zone, click the drop down and choose 'Edit'. Rename the zone.

For the first cloned zone, click the drop down and choose 'Move' and position it so that it's the last zone.

For the second cloned zone, click the drop down and choose 'Delete'. *This will delete the zone and its quantities (or sub zones if there were any).*



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. Assessment overview

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 the draft supply & fit bill.



Project specific quotes for supply & fit

Activity 1

Generate a project specific supply & fit quote request.

1. Create your quote request

Go to your supply & fit training project.

Select the applicable work package and assessment.

From the 'Assessment overview' page, go to 'Assessment Actions'.

Click 'Generate supply & fit quote request'.

Note: This will automatically download with a quote request for all the supply and fit products contained within the rate build up.

2. Obtain subcontractor pricing

At this point, you would normally send the quote request to your subcontractor(s) to fill in and send back. In this training activity you will act as the subcontractor by adding pricing. For further details on completing the spreadsheet, click [here](#).

Open the downloaded spreadsheet and fill out the yellow fields.

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

3. Import your subcontractors quote

Go to the 'Resources' menu.

Click the 'Supply & fit quotes' sub menu.

Click 'Import Quote'.

Choose the saved quote spreadsheet from your computer and attach.

Click 'Import quotation'.

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

Choose a subcontractor and project the quote relates to.

Set the expiry date.

Click 'Save quote'.

4. Apply the quote

Navigate back to the rate build up in your project.

Click 'Supply & fit'.

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

Refresh your browser and your pricing will update.



Incoming applications for payment for supply & fit

Activity 1

Incoming applications for payment

1. Generate an incoming application using the Chalkstring template

Before generating applications in Chalkstring, you must ensure that progress has been logged for the supply & fit work package products.

From the main blue menu, click 'Applications'.

Go to the 'Incoming application bill' sub menu.

Select the relevant supply & fit work package.

Click 'Application actions'.

Click 'Export application template'.

This template is exported into an Excel spreadsheet and should be sent to any subcontractors working on this project to use for any applications they will be sending to you for payment.

2. Complete the application template

At this point, you would normally send the application template to your subcontractor(s) to fill in and send back. In this training activity you will act as the subcontractor by completing the template.

Note: Only the yellow quantity and progress fields can be changed.

Change the quantity of a product so that it is slightly higher than currently set in the spreadsheet.

Change the progress for a product from 0% to 100%

Save the file to your computer and name it 'Subcontractor A'.

3. Import the application

From the 'Applications actions' menu, click 'Import Incoming Application'.

Set the effective date the application covers up to.

Select the subcontractor.

Drag and drop or click to browse to the saved application template document.

Click Import Application.

Once imported, you will see the red number update in the 'Review Incoming Applications' sub menu waiting for review and approval.



4. Manually input an incoming application

If the subcontractor has sent an application which is not in the Chalkstring template format, the information will need to be input manually.

From the onsite blue menu, click 'Applications'.

Click the 'Incoming application bill' sub menu.

Select the relevant work package from the drop-down box.

Click the + buttons for any product to add the quantity or progress % the subcontractor is applying for.

Note: you only need complete the quantity or applied percentage, the other will update accordingly. The rate being applied for the work can also be changed if required.

Once all items have been added, the 'in draft' totals will display the application totals.

From 'Application actions', click 'Save Incoming Application'.

Enter an effective date and subcontractor that the application applies to.

Click 'Save application'

The application will be saved to the 'Review Incoming Applications' sub menu, waiting for review and approval.

5. Review incoming application

Click the 'Review incoming applications' sub menu.

Click the magnifying glass icon to review the application.

Click the white '+' for 'Applied products' and add a product. This will be flagged automatically as a variation.

Enter a price as guesstimate for the variation product.

Add some quantities for the product.

Click save.

Repeat the above but for a 'Applied fixed cost'.

Click the white '+' to add a 'Payments on account'.

Select an assessment from the drop-down.

Enter a name for the payment.

Enter the value for the payment.

Click 'Save'.



6. Edit and approve application

From the 'Review incoming applications' sub menu.

Select a package from the drop-down.

Select the zone applicable to this application from the drop-down box.

Note: To edit application figures a package and zone filter must be applied.

Click the edit pencil for a product and change the rate and/or the applied quantity.

Click 'Amend application'.

Review the information for each application and edit as required.

Once confirmed the application is correct, click 'Approve'.

The application will update to approved and move to the 'Previous applications' sub menu.

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.

