

Purchasing Module

HFBS Purchasing Pro
HFBS v5.7.6.75 by HFBS

Current Project Milestone

FF + FE Orders Invoices Manufacturers Domain Currency: \$ Project Purchasing Currency: \$ Procurement:

Filter by: Type Group Search For selected item: Order Invoice

Briefing Requirements from Room Data Sheets						Domain Budget \$		Project Budget \$		Actual Cost \$		
ID	Rev	Date	Description	Grp	Qty	Selection	Unit \$	Subtotal \$	Unit \$	Subtotal \$	Unit \$	Subtotal \$
FF-390	1	29/1/2008	Baby change table	1	2				0.00		0.00	
FF-530	1	19/12/2008	Basin vanity top	1	15		75.00	1,125.00	0.00		0.00	
FF-530	2	19/12/2008	Basin vanity top	1	14				0.00		0.00	
FF-1000	1	19/12/2008	Bench seat	1	29				0.00		0.00	
FF-1000	2	19/12/2008	Bench seat	1	7				0.00		0.00	
FF-1002	1	19/12/2008	Bench seat: fold up/down	1	1				0.00		0.00	
FF-1020	1	29/1/2009	Bench: gluelam	1	1	800mm wide min			0.00		0.00	
FF-1050	1	29/1/2009	Bench: laminate	1	144				0.00		0.00	
FF-1050	2	29/1/2009	Bench: laminate	1	26				0.00		0.00	
FF-1090	1	19/12/2008	Bench: laminate, free st.	1	2	@ 1000mmH, preparation workstations			0.00		0.00	
FF-1090	2	19/12/2008	Bench: laminate, free st.	1	2				0.00		0.00	
Total							\$1,125.00		\$0.00		\$0.00	

Yellow highlighted cells have inconsistent Unit Price, Order ID or Invoice ID.

RDS Items (Read Only)
For selected item(s): For selected item: Order Invoice

Briefing RDS Item Information						Domain Budget \$		Project Budget \$		Actual Cost \$					
Dept	Tag	Name	No.	Rm Nu...	SAID	Grp	Selection	Qty	Total Qty	Unit \$	Subtotal \$	Unit \$	Subtotal \$	Unit \$	Subtotal \$
_Pending Stan...	1790	Change - S...	1		1000000006286439	1	with integral s...	1	1	75.00	75.00				
_Pending Stan...	1800	Change - S...	1		1000000006286460	1	with integral s...	1	1	75.00	75.00				
_Pending Stan...	1820	Change - S...	1		1000000006286480	1	with integral u...	1	1	75.00	75.00				
_Pending Stan...	1830	Change - S...	1		1000000006286497	1	with integral u...	1	1	75.00	75.00				
_Standard Co...	1300	Anteroom	1		1000000006288084	1		1	1	75.00	75.00				
_Standard Co...	1510	Bay - Hand...	1		1000000006288175	1	optional	1	1	75.00	75.00				
_Standard Co...	1810	Change - S...	1		1000000006288315	1	with integral s...	1	1	75.00	75.00				
_Standard Co...	2340	Ensuite - S...	1		1000000006288693	1		1	1	75.00	75.00				
_Standard Co...	2350	Ensuite - S...	1		1000000006288699	1	optional	1	1	75.00	75.00				
_Standard Co...	2360	Ensuite - S...	1		1000000006288716	1		1	1	75.00	75.00				
_Standard Co...	2370	Ensuite - S...	1		1000000006288735	1		1	1	75.00	75.00				
_Standard Co...	3080	Mortuary - ...	1		1000000006289055	1		1	1	75.00	75.00				
Total							15		\$1,125.00		\$0.00		\$0.00		

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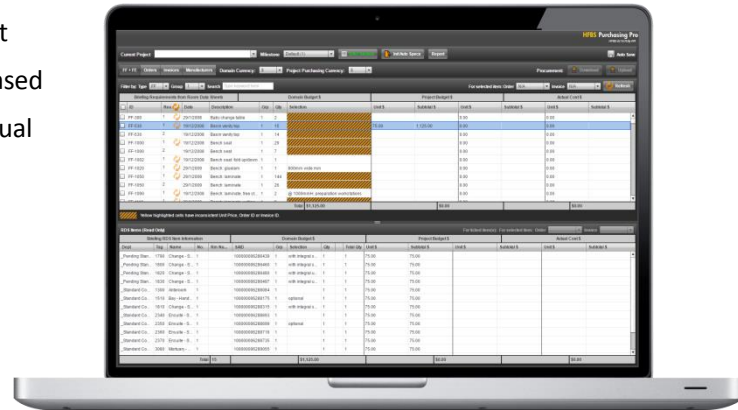
Domain Currency 19

Project Purchasing Currency 19

HFBS Purchasing Module Overview

The purchasing module allows users to create and track a budget from the inception of a construction project, as items are purchased during the project users can adjust the budget depending on actual invoice prices.

The module contains a series of detailed purchasing and budget reports that can be printed as the user populates their purchasing & budget information, these reports are invaluable at the budget report or even tendering stage of a health facility project.



HFBS Purchasing Module

This module concentrates on room contents. These are grouped by item type, and then displayed by Department and Room Location. There are provisions for Domain Budget, Project Budget and actual Project Cost.

Features include:

- Link to Order and Invoice
- Specify items centrally from this module
- Results show up on Briefing Module
- Export to Excel
- One click update to the latest item menu

This module is available on demand in HFBS, start a free trial today to begin using the module.

Get started with HFBS now: healthdesign.com.au

Loading a HFBS brief project

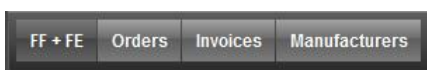
The HFBS Purchasing module loads a brief from the HFBS Briefing Module & uses this as a detailed reference of items inside the brief. This then is used to create a comprehensive list of items required to purchase during the project. This list can be altered & adjusted in the purchasing module; the brief is simply a reference point.

To load a project click the current project drop down in the top left corner & select an existing HFBS project to begin using the module.



View the Briefing Requirements

In the top left corner click FF+FE to view the briefing requirements



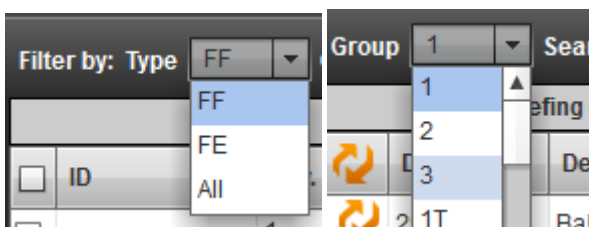
The briefing requirements are a list of distinctive FF + FE menu items already created in the HFBS brief.

NT: a menu item is an item in this list.

ID	Rev	Date	Description	Grp	Qty	Selection	Unit \$	Subtotal \$	Project Budget \$	Actual Cost \$
FF-380	1	29/12/2008	Baby change table	1	2					
FF-530	1	19/12/2008	Basin vanity top	1	16		75.00	1,200.00	0.00	0.00
FF-1000	1	19/12/2008	Bench seat	1	25			0.00	0.00	0.00
FF-1002	1	19/12/2008	Bench seat fold up/down	1	1			0.00	0.00	0.00
FF-1003	1	29/12/2009	Bench: gasket	1	1			0.00	0.00	0.00
FF-1050	1	29/12/2009	Bench: laminate	1	140			0.00	0.00	0.00
FF-1090	1	19/12/2008	Bench: laminate, tree st.	1	2			0.00	0.00	0.00
FF-1110	1	29/12/2009	Bench: laminate, writing	1	9		100.00	4,500.00	0.00	0.00
FF-1030	1	29/12/2009	Bench: resinate	1	6			0.00	0.00	0.00
FF-20150	1	17/3/2009	Bench: sink, stainless	1	1			0.00	0.00	0.00
FF-1010	1	19/12/2008	Bench: stainless steel	1	41			0.00	0.00	0.00
Total							\$5,706.00	\$0.00	\$0.00	\$0.00

Filter by Type and Group

Briefing requirements can be filtered by its menu type eg. FF/FE/All and group.



Search keywords

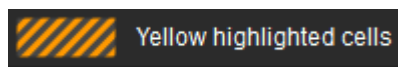
Type in keywords to narrow down the current filtered results.



Edit Room Data Sheet (RDS) Menu Group Information

Selection, Project Budget Unit and Actual cost unit can be edited by clicking into the cell in the grid. The changes made to all these three field are automatically propagated to the individual items in the room.

Yellow highlighted cells indicate inconsistencies in selection, unit price and etc.



Budget and Cost are automatically calculated based on Quantity and Unit Price. Subtotal of individual menu items and the sum is totalled for the selected menu type and group in the filter bar.



Domain Budget unit price for each briefing requirements menu are derived from budget value from HFBS menu module, when a menu is created. It is not editable.

Project budget is an estimated budget cost for a menu group. The unit column is editable and the subtotal will be automatically calculated. The updated unit cost is then propagated to the unit column of RDS items in the rooms for the same group.

Actual Cost is the exact incurred the cost for a menu group. The unit cost column can also be updated.

Revise Room Data Sheet (RDS) Menu version

The orange refresh icon indicates there is new version available for this menu group. Click on the Rev. column to update all items to the latest menu version. Alternatively, click individual menu to upgrade.

<input type="checkbox"/>	ID	Rev.	
<input type="checkbox"/>	FF-390	1	
<input type="checkbox"/>	FF-530	1	

Briefing Room Data Sheet (RDS) Items

To view the RDS Item information for a menu group in the project, just select the menu group and the RDS item information is loaded in the below grid.

Each row in the grid represents the location for the items in the room.

FF-20150	1	17/3/2009	Bench: sink, stainless	1	1	with deep cooling-off sink			0.00		0.00				
FF-1010	1	19/12/2008	Bench: stainless steel	1	41				0.00		0.00				
Total									\$5,700.00		\$0.00				\$46.00


Yellow highlighted cells have inconsistent Unit Price, Order ID or Invoice ID



FF-1010 - Bench: stainless steel															
For ticked item(s): Use product price Apply Products For selected item: Order Invoice Product Specs. Auto Specs.															
Dept	Tag	Name	No.	Item No.	SAID	Grp	Selection	Qty	Unit	Unit \$	Subtotal \$	Unit \$	Subtotal \$	Unit \$	Subtotal \$
._Pending Stan...	1410	Bay - Clea...	1	100000011665254	1			1	1	0.00	0.00				
._Pending Stan...	1870	Clean-Up ...	1	100000011665449	1		with wet edge	1	1	0.00	0.00				
._Pending Stan...	1880	Clean-Up ...	1	100000011665458	1		with wet edge	1	1	0.00	0.00				
._Pending Stan...	1980	Coffee Sho...	1	100000011665483	1			1	1	0.00	0.00				
._Pending Stan...	1980	Coffee Sho...	1	100000011665504	1		with wet edge	1	1	0.00	0.00				
._Pending Stan...	2152	Dental Inst...	1	100000011665561	1		with inset sink	1	1	0.00	0.00				
._Pending Stan...	2172	Dental Lab...	1	100000011665567	1		with wet edge, open under part	1	1	0.00	0.00				
._Pending Stan...	2174	Dental Lab...	1	100000011665585	1		island bench, optional	1	1	0.00	0.00				
._Pending Stan...	2174	Dental Lab...	1	100000011665576	1		with wet edge, open under part	1	1	0.00	0.00				
._Pending Stan...	2400	Equipment...	1	100000011667461	1		with wet edge	1	1	0.00	0.00				
._Pending Stan...	2405	Equipment...	1	100000011667467	1		with wet edge	1	1	0.00	0.00				
._Pending Stan...	2410	Equipment...	1	100000011667473	1		with wet edge, inset sinks	1	1	0.00	0.00				
Total									41		\$0.00		\$0.00		\$0.00


Edit Room Data Sheet (RDS) Item Information

Similar to the way that the RDS menu group works, Unit Project budget and unit Actual cost are editable for each room items in the list.

Briefing Auto Specification

To view Auto Specs for the item, select a room RDS item and click Auto Specs button. Click  button to close the panel.

Order	N/A	Invoice	N/A	 Product Specs.	 Auto Specs.
Project Budget \$			Actual Cost \$		
	Subtotal \$	Unit \$	Subtotal \$		

Specifications 

Selection

Copy specification

Copy to ticked RDS Item(s)

☐ Show Detailed Specification
 ☐ Show procurement specs only

Name	Value
Intended use	Stainless steel bench
Outline Specs	Stainless steel bench with or without a single
Master specs	[MS-0510]
Dimensions	L varies x 600D x 900H
Materials	Stainless steel
Finishes	Finished

Copy to ticked RDS Items

This feature allows copy of item's Auto Specification to the ticked RDS items in the list. First, tick the items individually or tick the check box on the column to tick all.

Briefing RDS Item Information								
<input type="checkbox"/>	Dept	Tag	Name	No.	Rm Nu...	SAID	Grp	Selec
<input checked="" type="checkbox"/>	_Pending Stan...	1410	Bay - Clea...	1		100000011666254	1	
<input checked="" type="checkbox"/>	_Pending Stan...	1870	Clean-Up ...	1		100000011666449	1	with w
<input type="checkbox"/>								

Then select an item and open Auto Specs Panel and click Copy to ticked RDS Item(s).

Copy to ticked RDS Item(s)


Show Detailed Specification

Tick this box to show the detailed specification for FF/FE RDS Item

<input checked="" type="checkbox"/> Show Detailed Specification	
Name	Value
Intended use	Stainle
Outline Specs	Stainle
Master specs	[MS-05

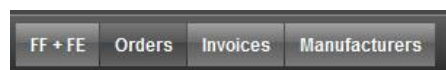
Show Procurement specs only

Tick this checkbox to show only the procurement specifications

<input type="checkbox"/> Show Detailed Specification <input checked="" type="checkbox"/> Show procurement specs only	
Name	Value
Is procured (Y/N)	
Asset location	
Procured by	
Procurement date	
Procurement comments	

Orders

Orders are groups of briefed room items you intend on purchasing. Click Orders in the menu bar to view Orders related information.



Add a New Order

Click into cell "Add New" and enter a new order name

Orders		
Order ID	Manufacturer/Supplier	Order
Order-001		08/25/2
Add New		

Assigning a group of briefed room items to an order

For information on how to assign a group of briefed items to an order check the below section "Assign RDS Items to Order or Invoice".

View an Existing Order

Select the order in the list and the RDS items in the Order will be loaded below.

Orders										
Order ID	Manufacturer/Supplier	Order Date	Delivery Date	Actual Date	Subtotal Cost \$	Delivery \$	Total \$	Evaluation	Remarks	
Order-001		08/25/2016	08/25/2016	08/25/2016	23.00		23.00			
Add New										
					Total	\$23.00	\$0.00	\$23.00		

RDS Items (Read Only)										
Briefing RDS Item Information						For ticked item(s): For selected item: Order Invoice				
Dept	Tag	Name	No.	Rm No.	SAB	Grip	Selection	Qty	Total	
Standard Co.	4580	Toilet - Dis.	1		100000011668420	1	optional	1	1	0.00
					Subtotal \$		Unit \$		Subtotal \$	
									23.00	
Standard Co.	4610	Toilet - Pub.	1		100000011668443	1		1	1	0.00
					Subtotal \$		Unit \$		Subtotal \$	
									23.00	

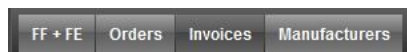
Select a Manufacturer/Supplier for Order

Click into the cell under Manufacturer column and select from there

Invoice		
Invoice ID	Manufacturer/Supplier	Invoice Date
Invoice-001		08/25/2016
Add New	Manufacturer-001 Project	

Invoices

Invoices hold information about costs of purchased items; enter your invoice information in to track the real costs of the project. Click Invoices in the menu bar to view Invoices related information.



Add a New Invoices

Click into cell “Add New” and enter a new Invoices name

Invoice ID	Manufacturer/Supplier	In
Invoice-001		08/25/2016
Add New		

Assigning a group of briefed room items to an invoice

For information on how to assign a group of briefed items to an invoice check the below section “Assign RDS Items to Order or Invoice”.

View an Existing Invoices

Select the Invoices in the list and the RDS items in the Invoices will be loaded below.

Invoice ID	Manufacturer/Supplier	Invoice Date	Subtotal Cost \$	Delivery \$	Total \$ (Updatable)	Remarks
Invoice-001		08/25/2016	23.00		23.00	
Add New						
			Total	\$23.00	\$0.00	\$23.00

Briefing RDS Item Information										For locked item(s): For selected item: Order				Invoice	
Dept	Tag	Name	No.	Rm No.	SAID	Grp	Selection	Qty	Total	Unit \$	Subtotal \$	Unit \$	Subtotal \$	Unit \$	Subtotal \$
Standard Co.	4580	Toilet - Dis	1		100000011659420	1	optional	1	1	0.00	0.00			23.00	23.00
Standard Co.	4610	Toilet - Pub	1		100000011659443	1		1	1	0.00	0.00				

Select a Manufacturer/Supplier for Invoices

Click into the cell under Manufacturer column and select from there

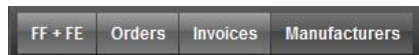
Invoice ID	Manufacturer/Supplier	Invoice Date
Invoice-001		08/25/2016
Add New		
	Manufacturer-001	Project

Update Total

Invoice total is updatable.


Manufacturers

Manufacturers are the producers of the items you have added to your brief & intend to purchase from. Click Manufacturers in the menu bar to view Manufacturers related information.





Add a New Manufacturer



Click into cell “Add New” and enter a new Manufacturers name

System Specific Manufacturers		
Scope	Name	Address
Project	Manufacturer-001	
Project	 Add New	

Assign RDS Menu Groups to Order or Invoice




Clicking on a menu group and select an order from the dropdown list on the far right to assign to the order/invoice. By doing so, all the RDS items under this menu group will be automatically assigned.




For selected item: Order N/A Invoice N/A  Refresh			
Project Budget \$		Actual Cost \$	
Unit \$	Subtotal \$	Unit \$	Subtotal \$
0.00			23.00
n nn		n nn	

For selected item: Order N/A Invoice N/A  Refresh			
Project Budget \$		Actual Cost \$	
Unit \$	Subtotal \$	Unit \$	Subtotal \$
0.00			23.00
n nn		n nn	

Assign RDS Items to Order or Invoice

Individual room items can be assigned to order/invoice.

For ticked item(s): <input type="checkbox"/> Use product price				 Apply Products	For selected item: Order		<div>N/A</div>	Invoice	<div>N/A</div>	 Product Specs.	 Auto Specs.
				Domain Budget \$			<div>N/A</div>	et \$	Actual Cost \$		
	Qty	Tot...	Unit \$	Subtotal \$		Unit \$		Subtotal \$	Unit \$	Subtotal \$	
	1	1	0.00	0.00							
	1	1	0.00	0.00							

For ticked item(s): <input type="checkbox"/> Use product price 				For selected item: Order <div>N/A</div>				Invoice <div>N/A</div>		 Product Specs.		 Auto Specs.			
				Domain Budget \$				Project Budget \$				Actual Cost \$			
	Qty	To...	Unit \$	Subtotal \$		Unit \$	Subtotal \$		Unit \$	Subtotal \$		Unit \$	Subtotal \$		
	1	1	0.00	0.00											
	1	1	0.00	0.00											

Integration with Products Module

The HFBS Purchasing Module also integrates with the products module to utilise detailed product information and images to assist with the purchasing & product selection process.

The HFBS Products Module is also available from the HFBS home page, just click on the module icon to get started cataloguing your products.



HFBS Products Module

Apply product selection

In the Products Module, select the Product Group by click on the blue highlight and click on copy button above.



Paste into individual RDS Item

In the purchasing module, select the Room Item in the list and click Product Specs to open the Product selection panel

Project Budget \$		Actual Cost \$	
Subtotal \$	Unit \$	Subtotal \$	Unit \$
0.00		23.00	
0.00			

Click Paste product selection button to apply

Project Budget \$	
Unit \$	Subtotal \$

Product Selection

Paste product select...

Paste product selection

Product information will show in the panel. To apply a different product, follow the same steps in products module. Open the Product Specs Panel in Purchasing module and click Paste Product.

To Clear the product information, click clear.

For selected items:

Project Budget \$


Subtotal \$

\$0.00

Products

Clear

Paste Product



SAID

100000021761104

Code

FF-390-3

Group

FF-390

Name

Baby Change Table

Supplier

Alspec

Lead Time

Qty

10

Warranty

Location


Environmental

1


selected item: Order Order-001 Invo

Paste into multiple RDS Items

In the RDS item information grid, tick the checkbox individually or tick the checkbox in the column and click Apply Products button above. This applies the product selection to all ticked RDS items.

For ticked item(s): <input type="checkbox"/> Use product price  Apply Products		For selected item: Order	
Domain Budget \$		Project Budget \$	
Unit \$	Subtotal \$	Unit \$	Subtotal \$
1.00	0.00		
1.00	0.00		

After applying the product selection, the selection field of RDS items will have [product group name] appended. This tag will be used for Schedule of Finishes Report. Any item in FF/FE with square brackets will be printed.

For ticked item(s): <input type="checkbox"/> Use product price  Apply Products						
RDS Item Information						
m Nu...	SAID	Grp	Selection	Qty	Total ...	Unit \$
	100000011669420	1	optional[FF-390]	1	1	0.00
	100000011669443	1	[FF-390]	1	1	0.00

Use product price

The checkbox next to Apply Products determines whether the unit price set in product selection will be used or not.



Name

Baby Change Table

Unit cost

200

Category

Tables

Quantity

10

Supplier

Alspec

Lead time

Available

☒ *Enter comments*

Warranty

Description

Environmental

If it is ticked, the unit price of actual cost column will be updated. However, this only applies to the checked RDS Items.

For selected item: Order Order-001 Invoice Invoice-0... Product Specs. Auto Specs.			
Project Budget \$		Actual Cost \$	
	Subtotal \$	Unit \$	Subtotal \$
		200.00	200.00
		200.00	200.00

Reports

Most of the reports from Briefing Module can be accessed from here. There are some Purchasing Module specific reports available for download as well, such as Purchasing FF and FE Costing by Group, Purchasing Invoices, purchasing manufacturers – Suppliers and Purchasing Orders.

The screenshot shows a window titled "Report(s)" with a close button (X) in the top right corner. The window is divided into two main sections. The left section, titled "Report Selection(s)", contains three radio buttons for output format: PDF (selected), MS-Excel, and MS-Word. Below these is a list box containing the following reports: "Purchasing FF and FE Costing by Group" (highlighted), "Purchasing FF and FE Costing by Group", "Purchasing Invoices", "Purchasing Manufacturers - Suppliers", "Purchasing Orders", "Room Comparison Report by Room Code", and "Room Comparison Report by Room Tag". The right section, titled "Report options", has a tab labeled "Archives". It displays the selected report, "Purchasing FF and FE Costing by Group", and provides a description: "Prints the FF and FE items by Group with Total quantities only, identifying the Budget price, the Actual cost as entered by the User and procurement details – order and invoice numbers. The report prints FF items first in Item description order, followed by FE items." Below this is a status message "No Sample Available". A section titled "Additional report options" contains a list of checkboxes: "Include Group 1" (checked), "Include Group 1T" (checked), "Include Group 2" (checked), "Include Group 2T" (checked), "Include Group 3" (checked), "Include Group 3T" (checked), "Include Inactive Departments" (unchecked), "Detailed Report" (unchecked), "Show Company Info?" (unchecked), "Show User Info?" (unchecked), and "Show Company Logo?" (unchecked). At the bottom of the window are three buttons: "Cancel", "Preview", and "Download".

Project security

For a project to show under current project dropdown, user must be ticked as Purchasing Admin in Project Access Module.

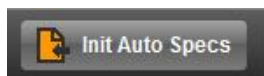
SAID Tracked

This indicates that the project is SAID enabled.



Initialise Auto specs

If auto specifications are empty, click this button to initialise for the entire project.



Domain Currency

Change Domain Currency by selecting from the domain currency dropdown.



Project Purchasing Currency

Change Project Currency by selecting from the Project Purchasing currency dropdown. This applies to purchasing module only.



