Purchasing Module

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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.
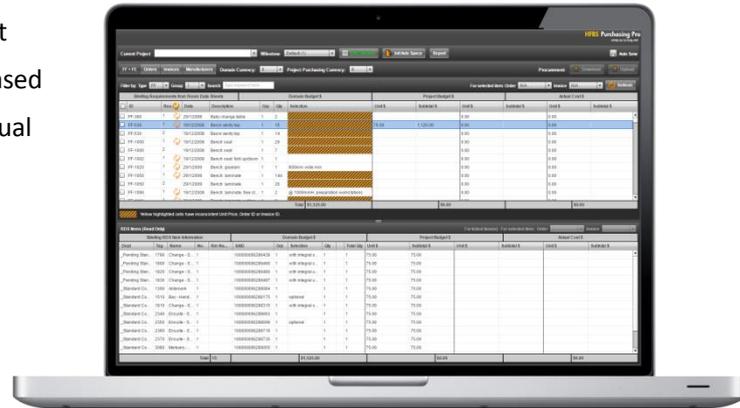
HFBS Purchasing Module

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

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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.

Filter by Type and Group

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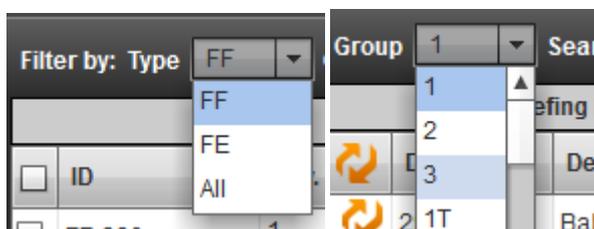
Search keywords

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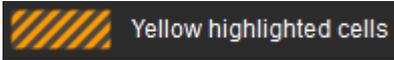
Budget and Cost are automatically calculated based on Quantity and Unit Price. Subtotal of individual menu items and the sum is totalled for the selected menu type and group in the filter bar.

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.

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.

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.

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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.

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.

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

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Show Detailed Specification

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

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

Show Detailed Specification	☑ 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.
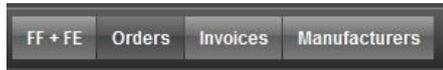
Add a New Order

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

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.

Select a Manufacturer/Supplier for Order

Click into the cell under Manufacturer column and select from there

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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.
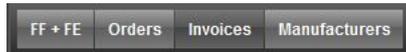
Add a New Invoices

Click into cell "Add New" and enter a new Invoices name
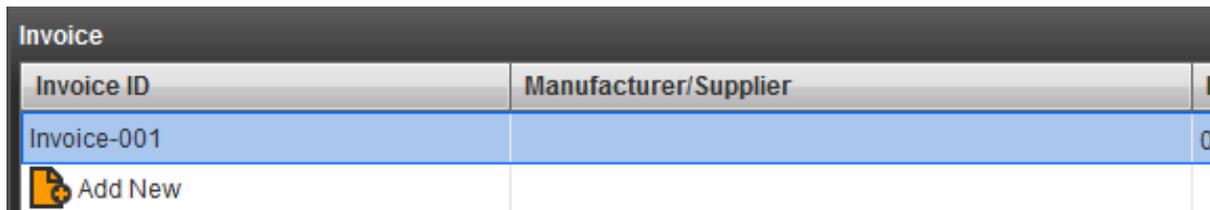
Assigning a group of briefed room items to an invoice

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.
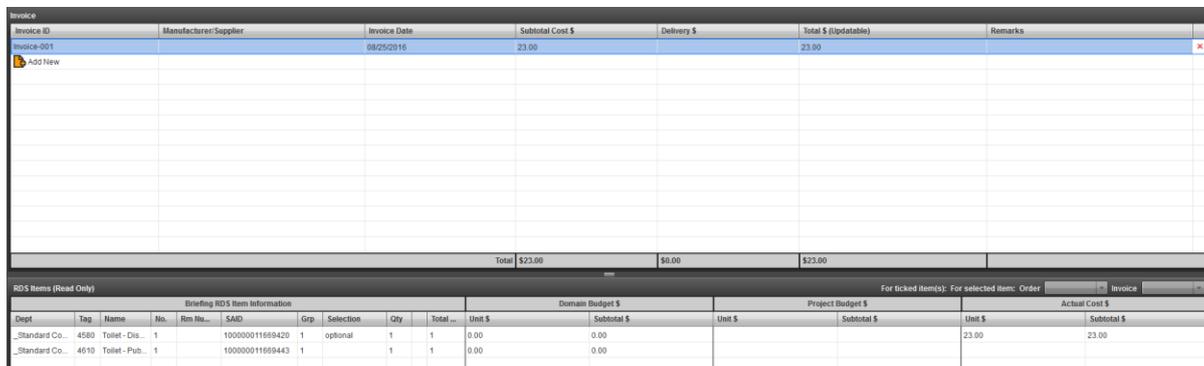
Select a Manufacturer/Supplier for Invoices

Click into the cell under Manufacturer column and select from there
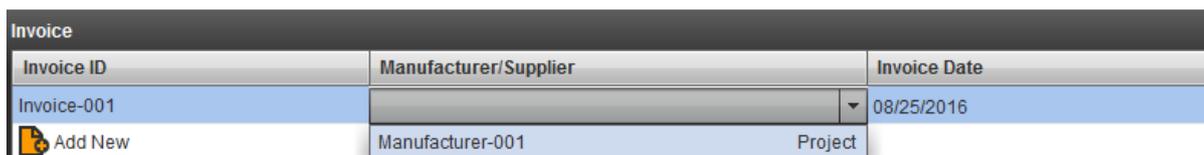
Update Total

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.
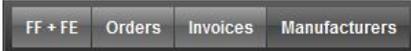
Add a New Manufacturer

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

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.

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Assign RDS Items to Order or Invoice

Individual room items can be assigned to order/invoice.

	Qty	Tot...	Unit $	Subtotal $	Unit $	Subtotal $	Unit $	Subtotal $
			Domain Budget $		et $		**Actual Cost $**	
	1	1	0.00	0.00				
	1	1	0.00	0.00				

For ticked item(s): ☐ Use product price Apply Products | For selected item: Order [N/A ▼] Invoice [N/A ▼] Product Specs. Auto Specs.
- N/A
- Order-001

	Qty	Tot...	Unit $	Subtotal $	Unit $	Subtotal $	Unit $	Subtotal $
			Domain Budget $		**Project Budget $**		**Actual Cost $**	
	1	1	0.00	0.00				
	1	1	0.00	0.00				

For ticked item(s): ☐ Use product price Apply Products | For selected item: Order [N/A ▼] Invoice [N/A ▼] Product Specs. Auto Specs.
- N/A
- Invoice-001

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

Click Paste product selection button to apply

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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.

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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): ☐ Use product price	Apply Products	For selected item: Orde
Domain Budget $		**Project Budget**

Unit $	Subtotal $	Unit $	Subt
.00	0.00		
.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 tic

ing 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

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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.
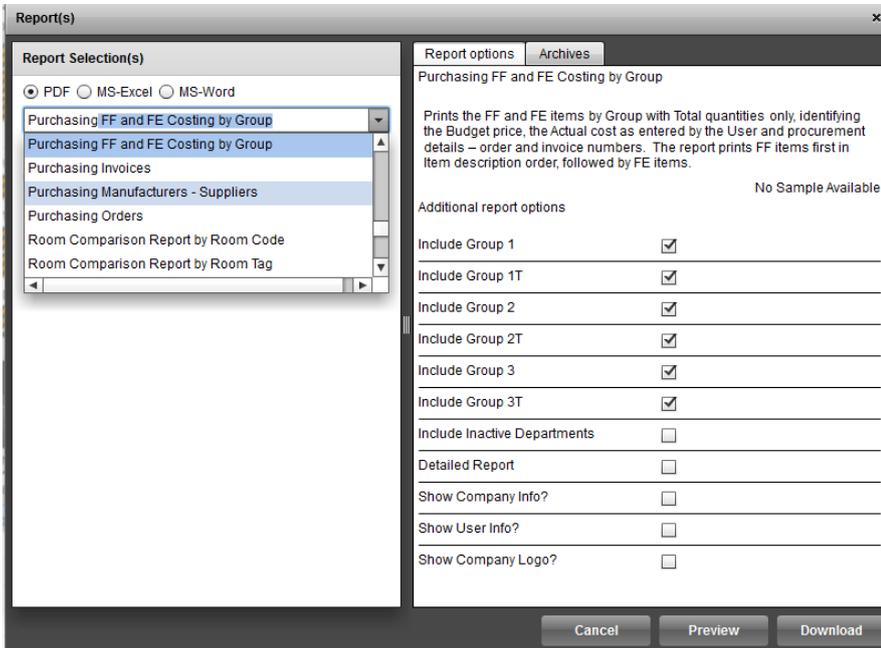
Project security

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.

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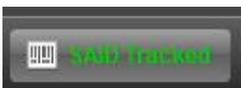
Initialise Auto specs

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.
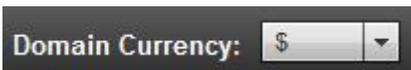
Project Purchasing Currency

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

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HFBS Purchasing Pro
HFBS v5.7.6.75 by HPI

Current Project | Milestone | Default (1) | Add Invoice | InitAuto Specs | Report | Auto Save

FF + FE | Orders | Invoices | Manufacturers | Domain Currency: $ | Project Purchasing Currency: $ | Procurement: Download | Upload

Filter by: Type FF | Group 1 | Search Type keyword here | For selected item: Order N/A | Invoice N/A | Refresh

	ID	Rev	Date	Description	Grp	Qty	Selection	Unit $	Subtotal $	Unit $	Subtotal $	Unit $	Subtotal $
								Domain Budget $		Project Budget $		Actual Cost $	
	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-1110	1	29/1/2009	Bench: laminate, writing...		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 ticked item(s): For selected item: Order | Invoice

Dept	Tag	Name	No.	Rm Nu...	SAID	Grp	Selection	Qty	Total Qty	Unit $	Subtotal $	Unit $	Subtotal $	Unit $	Subtotal $
										Domain Budget $		Project Budget $		Actual Cost $	
_Pending Stan...	1790	Change - S...	1		100000006286439	1	with integral s...	1	1	75.00	75.00				
_Pending Stan...	1800	Change - S...	1		100000006286460	1	with integral s...	1	1	75.00	75.00				
_Pending Stan...	1820	Change - S...	1		100000006286480	1	with integral u...	1	1	75.00	75.00				
_Pending Stan...	1830	Change - S...	1		100000006286497	1	with integral u...	1	1	75.00	75.00				
_Standard Co...	1300	Anteroom	1		100000006288084	1		1	1	75.00	75.00				
_Standard Co...	1510	Bay - Hand...	1		100000006288175	1	optional	1	1	75.00	75.00				
_Standard Co...	1810	Change - S...	1		100000006288315	1	with integral s...	1	1	75.00	75.00				
_Standard Co...	2340	Ensuite - S...	1		100000006288693	1		1	1	75.00	75.00				
_Standard Co...	2350	Ensuite - S...	1		100000006288699	1	optional	1	1	75.00	75.00				
_Standard Co...	2360	Ensuite - S...	1		100000006288716	1		1	1	75.00	75.00				
_Standard Co...	2370	Ensuite - S...	1		100000006288735	1		1	1	75.00	75.00				
_Standard Co...	3080	Mortuary - ...	1		100000006289055	1		1	1	75.00	75.00				
							Total	15		$1,125.00		$0.00		$0.00	

More information: **hfbsinfo.com**