



Keeping a tight control over projects can be a time consuming task

With many facets to a project, you need to manage the multiple orders and quotations, the delivery schedule and agreed pricing terms and the financial performance against the overall project.

You don't need to create a project as the job starts, you can create it in advance. Project can be raised for existing customers, or for new business prospects. You can raise quotations and monitor the likelihood of success through regular updates of the project status. The project itself can be created with relevant detail such as project status, start and end dates. In addition, estimates may be added and actual performance monitored over the life of the project.

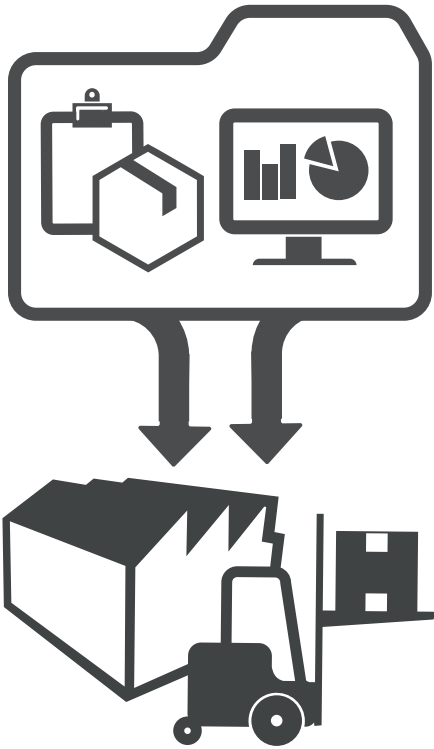
Details of individual contacts from the integral CRM system, such as architects, sub-contractors and other influencers, may be added within each project so you can ensure that you have full knowledge of who is associated with the project, their individual roles within it and their contact details.

Each stage of a project can optionally be broken down into individual phases, with orders and quotations being monitored at each phase. For example, customers that wish to monitor the progress of multi-stage projects, such as new build housing projects, may choose to associate house-types with each phase of the project.

Key Benefits

- Create a project and add start and end dates, estimates and project contacts
- Add multiple stages to each project, with optional phases and sub-phases
- Create quotations and sales orders, with agreed pricing terms
- Monitor the actual versus the estimated costs at each stage
- Issue timed invoices to coincide with the completion of project stages

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A further sub-division enables a plot to be associated with the house type. Quotations and orders may then be raised at this level, providing management with a view of activity at total project, stage and phase level and sub-phase level.

Once orders have been created, the schedule for delivery can be defined. For each order created, it is possible to set up the call-off dates and quantities, and for the business to monitor the activities. Extras to the project, not included in the original estimates, are simple to track. In addition, anticipated costs, such as inter-branch transfers, can also be tracked.

Invoice schedules may be created so that invoices are raised for specific values at specified times, giving a clear picture of the costs incurred to date versus the invoiced value to the customer.

Using the integral reporting tools, customers may monitor all phases of the project to ensure that deliveries are planned to schedule, that all costs and revenues associated with the project are recorded and monitored and that management has clear visibility of progress at all times.

About Kerridge Commercial Systems (KCS)

We provide specialist software, services and support to deliver fully integrated trading and business management solutions to distributive trades customers, large and small – wherever they are in the world. Immersed in the distributive trades for over 40 years, our technical experts are thought leaders in trading and management technology, and our innovative and flexible approach ensures our customers partner with us for the long-term.

Our mission is simple: to design and deliver high performance, integrated ERP solutions that enable our distributive trade customers to source effectively, stock efficiently, sell profitably and service competitively.

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