PCBx3 Manager Release 8.1 | Summary of **NEW** Features

Module	Category		Features
Human Resource Management (HRM)	HR	**NEW** ●	HR Details continued – allocate special inventory stock items – Assets, Licences (IT) and For Hire items. Charge items for hire and track assets provided and IT licences in use
Client Request Management	Request Reqister	**NEW** ●	Client Request Register – Move a request to a different client and site
Costing / Quoting	Quote Register	**NEW** ●	Move a quote to a different client and site
	Quote Details	**NEW** ●	Quote Approval – Advanced project options including project specific rates schedule and project contract that provides integration with diary entries & periodic progress payment claims
	Quote Line-items	**NEW** ●	Quote Line-items – group associated line-items into packages & automatically add a package header record; report in client reports package totals only
		NEW ●	Quote Line-items – utilise options to calculate # of hours for labour (# of persons x hours per day x # of days) or # of sheets for material (area in m2 x sheet in m2 x wastage %); integrated with quantity-take-off worksheet to process large datasets
Project Management	Plan & Monitor	**NEW** ●	Project Contract – capture & monitor over 40 key contract clauses; integrated with project diary & periodic payment claims (PPC) modules; quick menu access to CRM logs, task & diary, project dashboard and PPC
		NEW ●	Material Procurement Management – easily & quickly generate and/or schedule purchase orders including must be delivered on, lead days & place order on; schedule order confirmation & site visit; generate tasks & emails
	Manage	**NEW** ●	Project Rates Schedule – use default charge out rates or setup project specific charge out rates for trades and skill sets including apprentices, engineers, trades person, skilled labour and unskilled labour
		NEW ●	Stock Items on Site – easily track and charge for machinery & tools on projects; quickly add special inventory items – Assets & For Hire – to a project and on return generate an invoice
		NEW ●	OH&S Checklists – Maintain a project register of QH&S checklists and other documents sourced from main library & transferred to project folder for quick access; quick access to diary's OH&S entries

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Project Management	Invoice & Periodic Claims	**NEW** ●	Periodic Progress Payment Claims – Entity Summary and Project Details – Including export & entity drill down to project level and individual claim transactions; quick access to contract and variations, delete a claim (in progress) or add a new claim
		NEW ●	Progress Payment Claim Details – Create & auto-fill new claims for cost plus or fixed price projects: Initial deposit, periodic claims, adjustment to time/cost, interest on overdue amounts or retention, liquidated damages, retention release
		NEW ●	Progress Payment Claim Details – For periodic claims enter $ or % on a trade level or include external calculated values or enter one value only; workflow status – submitted, approved, invoiced and paid – including auto alerts based on contract clauses
		NEW ●	Sales Invoice for Cost Plus Projects – Add profit calculation line-item; add HR names to labour transactions, flag variation line-items
Integrated Apps	Integrated Apps	**NEW** ●	The PCBx3 Manager	Diary – integrates with clients, requests, quotes, projects & service jobs and allows to easily create diary entries for each. It also allows recording entries for the logged in entity – meeting notes or similar - or the current user.
System	Admin Functions & Tools	**NEW** ●	Test / Training Data Environment Option – when selected, this option automatically creates a test or training environment using the current LIVE database. Once created it is available for selection on the New DB Connection option on the login form. It is updated each time it is accessed