

Getting Started with



**BARTENDER**

# Contents

<b>Contents</b>	<b>1</b>
<b>Getting Started with Bartender</b>	<b>2</b>
<b>Grouping in Cubit</b>	<b>3</b>
<b>Sending a Job to Bartender</b>	<b>5</b>
<b>Your Job in Bartender</b>	<b>7</b>
<b>Adding Quotes</b>	<b>9</b>
<b>Comparing Quotes</b>	<b>14</b>
<b>Reviewing Trade Packages</b>	<b>17</b>
<b>Adding Notes</b>	<b>18</b>
<b>Reporting from Bartender</b>	<b>19</b>
Manual Adjustment Summary	20
Trade Packages Overview	21
Trade Summary	22
<b>Receiving Picked Quotes to Cubit</b>	<b>23</b>
<b>Restoring a Job</b>	<b>25</b>
<b>Managing Users</b>	<b>26</b>
<b>Shortcut Keys</b>	<b>28</b>

# Getting Started with Bartender

Welcome to Bartender, the next generation subcontractor comparison solution. Bartender builds on the success of our Subcontractor Comparison Program (SCP); and is being developed to offer you the powerful functionality of SCP, improved, enhanced, and delivered in a fresh and innovative way.

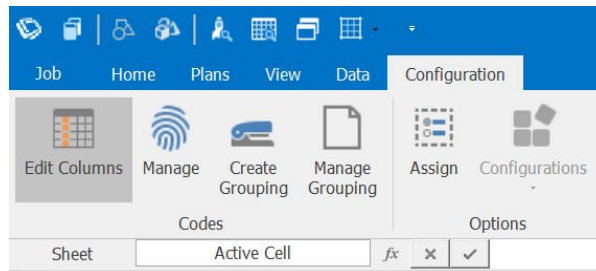
We've created this guide to provide you with some of the introductory instruction you'll need in order to start using Bartender. You should use it as a guide to help you explore the software and start testing its functionality.

Feel free to contact your Product Consultant if you have any questions, or you can email [bartender@buildsoft.com.au](mailto:bartender@buildsoft.com.au).

# Grouping in Cubit

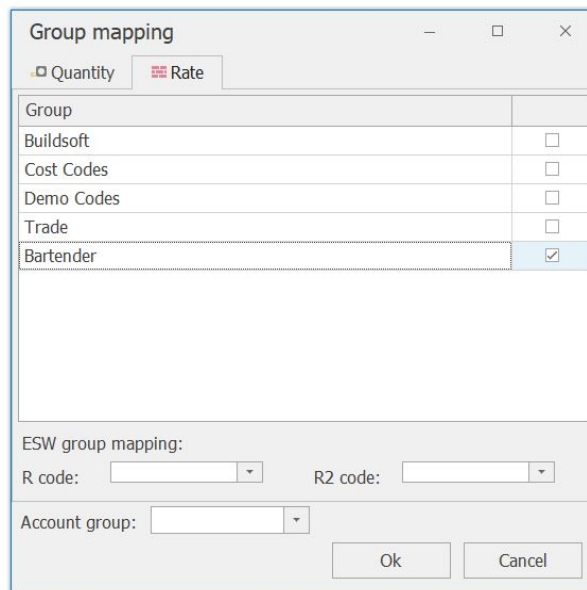
The ability to Group and Re-Sort a Job has always been paramount to Cubit and Global Estimating. And now with Cubit 8, you can do this in one Job. You can Group and Re-sort your Jobs, and change between the different Views from one Job. Any changes to your estimate will be reflected instantly in your **Grouped Views**.

You can apply **Codes** to your Job by clicking **Edit Columns** from the **Code** group in the **Configuration** tab in the ribbon.



*Adding a Code Column*

The **Group mapping** window will open with a list of available Code Groups that you can map to. Check the box to the right of the Code Group you wish to Group by and click **Ok**.



*Choosing a Code Group*

In Cubit, **Live Grouping** only works with **Rate Codes**, which means you can only apply Grouping Codes to the **Item sheet** and **Rate sheet**.

A **Code Column** for the **Code Group** you selected will be added to the **Item sheet** and **Rate sheet**, you can then go through and select the **Trade Package** that each Item belongs to. You can select multiple Items at any one time to Group faster, and even Group Items from a Price List.

Description	Bartender	Factor	Quantity	Unit	Rate	Markup	Total
Concrete							886,227.21
Substructure							679,193.76
Bulk Excavation	10		3,232.00	m3	100.32		324,234.24
450 thick base to core					717.68		6,722.83
120 thick slab on ground	101				395.04		296,865.65
Drainage layer	102				67.21		6,313.34
Excavate for lift pit base	103				120.00		1,463.73
Pile Caps	104				672.49		43,593.97
Columns	105						34,423.45
1200 x 200 x 3000high insitu column; reinforced with 250kg/m3, placed by pump	106				1,639...		34,423.45
Stairs	107						7,077.41
Reinforced concrete fire stairs complete	108				1,769...		7,077.41
External Wall	109						72,489.70
Louvres	110				355.00		26,706.90
Blockwork					129.00		45,782.79
Internal Wall							1,188.10
250 thick insitu core walls, 32 - 65 MPA concrete placed by pump, reinforced with 180kg/m3					438.31		

*Using the Code Column*

To create a Grouped View, click the **Grouped Views** tab inside the **Item sheet** and then click the **Plus** icon. The **Group on Rate code** window will open, and you can customise how you wish to sort the view. Name the Group, choose what level to **Inspect the Rates to**, and choose the **Description** of the New Items. When you're ready, click **Group**.

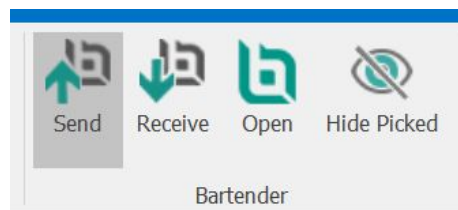
*Choose how you will Group a Job*

Your **Grouped Views** are Read only and cannot be edited, but any changes made to your **Estimate** will be reflected instantly in your **Grouped Views**.

*More information on Grouping a Job can be found in the Cubit User Guide.*

# Sending a Job to Bartender

From Cubit click **Send** from the **Bartender** group in the **Home** tab in the ribbon.



*Send a Job to Bartender*

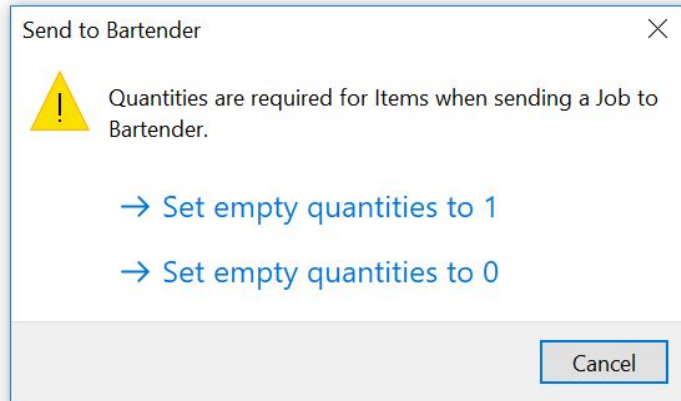
If you haven't entered your Bartender login details already, you will be prompted to enter your **Username** and **Password**.

*Login to Bartender*

By default, the **Name** and **Job Code** of your **Bartender Job** will match Cubit, but you can change these. If you have a **Grouped Job**, this will be selected by default. If you have created multiple **Views**, you can choose which one to use; you can also upload your Estimate directly. Once you have picked a Group and created a Job in Bartender, you can't change it.

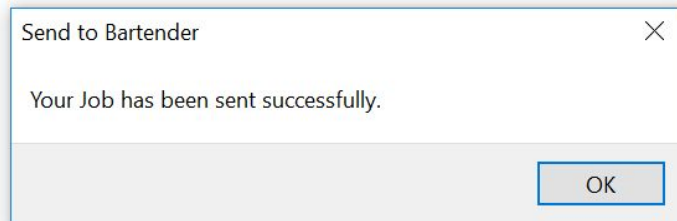
*Create a Bartender Job*

Quantities are required for all Items when sending a Job to Bartender. If any Item does not have a quantity when you are sending your Job, you will be able to **Set empty quantities to 1** or **0**, or you can click **Cancel** to manually enter quantities.



*Setting Quantities*

If your Job is successfully sent to Bartender, a confirmation window will show. Click **OK** to continue.

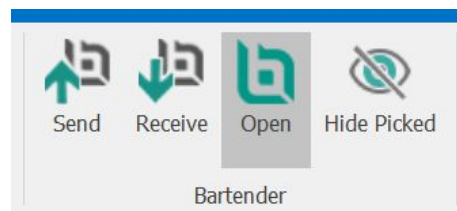


*Success*

**IMPORTANT:** When you send your Job from Cubit to Bartender, **Factor** will be applied to any **Quantity**. The **Markup**, **Job Adjustments**, and **Sales Tax** will not be sent to Bartender.

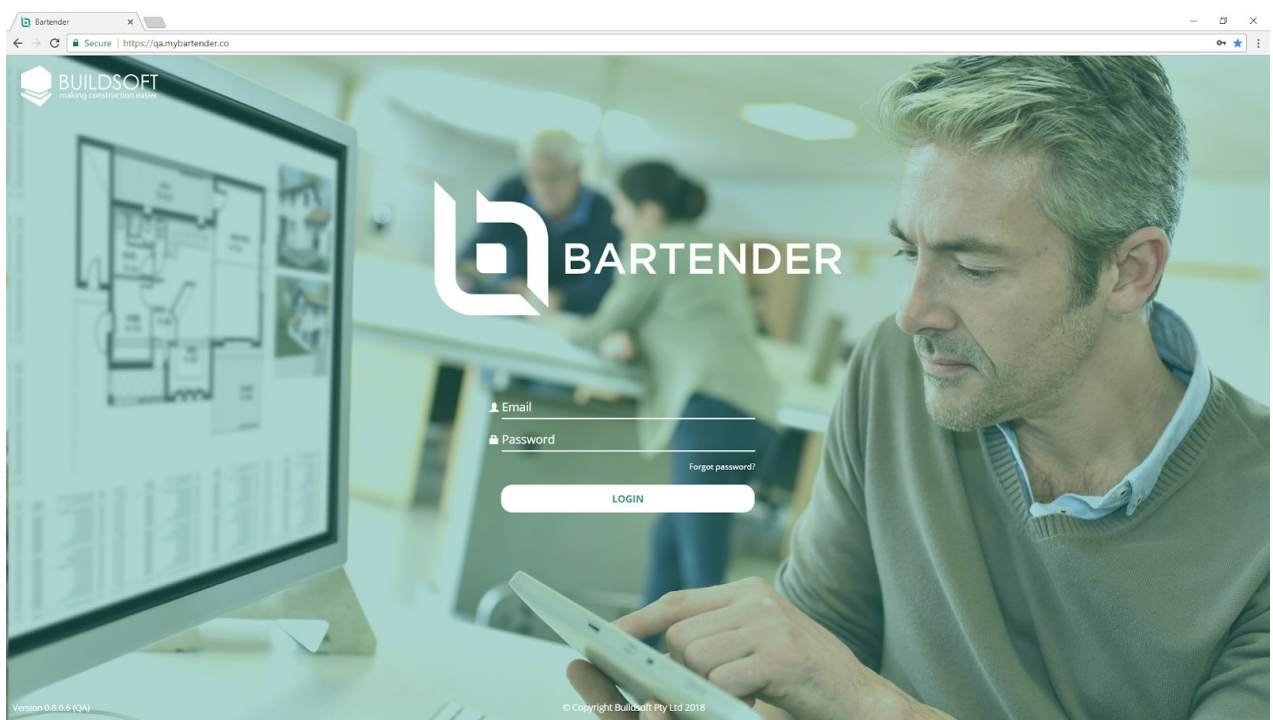
# Your Job in Bartender

You can open Bartender directly by clicking **Open** from the **Bartender** group in the **Home** tab in the ribbon. If you click **Open** from a Job that is in Bartender, you will open that Job in Bartender.



*Open Bartender*

Alternatively, you can go directly to Bartender by going to [au.mybartender.co](https://au.mybartender.co) in your internet browser.



*Open Bartender*

We highly recommend using Google Chrome as your internet browser and having Bartender maximised in a monitor with a resolution of 1920x1080. Bartender works optimally to this setting and is not designed to work for smaller screens.

If you have any issues logging into Bartender, please contact your Product Consultant at Buildsoft.



After logging into Bartender, you will see the **Job List** page. Your Job List page is a list of the Jobs available in Bartender, the default status filtered for you will be your open Jobs.

Job	Packages	Code	Client	Created	Updated	Assigned to	Closing on	Tender due	Total	Difference
Willowdale Academy Newtown, NSW	12	J505	Buildsoft Constructions	25/09/2017	25/09/2017	Danny			\$3,558,941	\$0

### Bartender Job List

Click on the name of any Job to open it, and you will be directed to the **Job Details** page. This page has basic information about your Job, from the **Cubit Job Manager**.

The map will show you the location you set as the **Site Address** in **Cubit**. Any Job you send will also have a **Status** of **Created**. From the **Job Details** page you can change the Status and set dates for when it is **Closing** and being **Reviewed**.

### Bartender Job Details

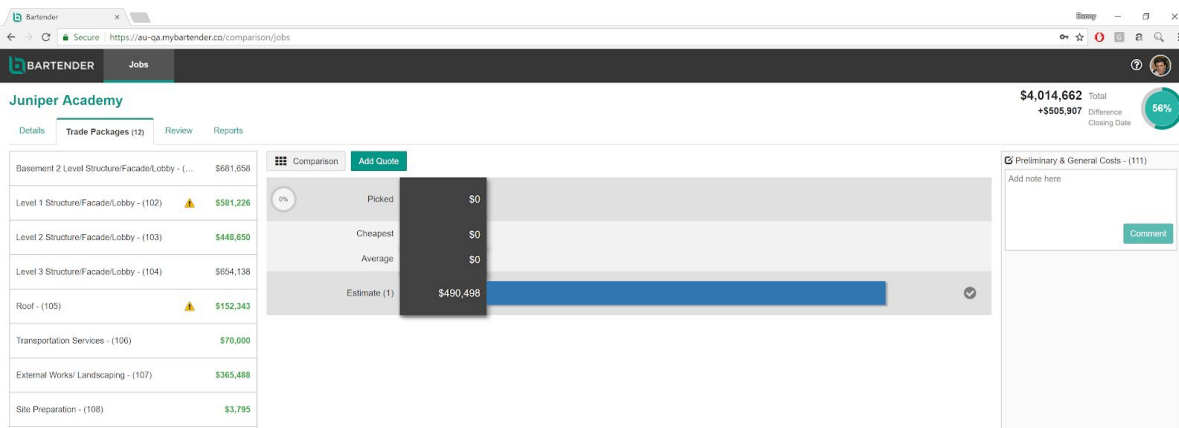
At the top right corner you can see an **Overview** of a Job. The pie chart will show the percentage of the Job that has been picked; and you can also see the **Total**, the **Difference** of the Total to the original Estimate from Cubit; and the **Closing Date**.



### Bartender Job Overview

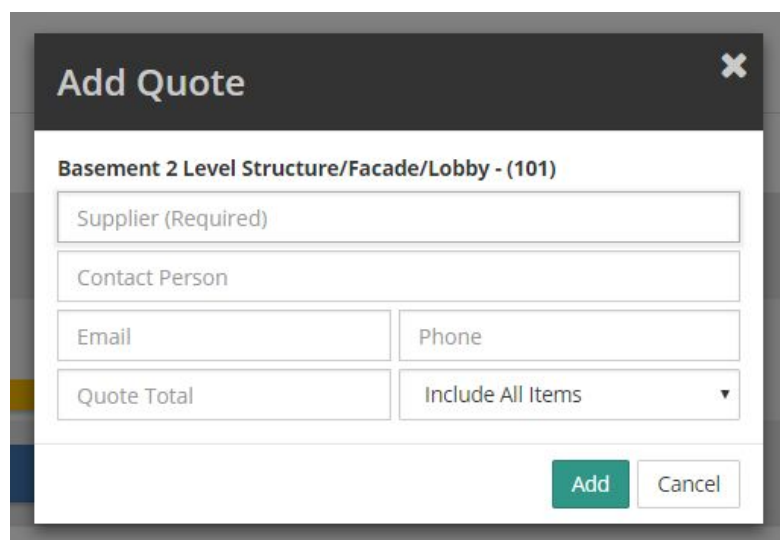
# Adding Quotes

Clicking **Trade Packages** will take you to the **Trade Package Summary** page. On the left is the Trade List, which shows all your Trade Packages and the Estimate of each. You can select the Trade you want to add a Quote to from the **Trade List** on the left, and then click **Add Quote** to begin.



Trade Packages Summary page

From the **Add Quote** window, only the **Supplier** name is required. You can enter a lump sum amount if you want to use **Manual Total**, or leave this empty if you want to cost each Item individually. By default adding a **Manual Total** will mark all Items as INCL; or alternatively you can choose to Pro rata from the Estimate or from another Quote. You can add a **Contact**, **Phone Number** and **Email** for any Company, which will be saved to that Company but can still be changed for any other Quote.



Add Quote window

By clicking **Comparison**, you will see a detailed, itemised **Trade Package Comparison** page with a spreadsheet layout, which can be used to build up more detailed Quotes.

The screenshot shows the BARTENDER software interface for a 'Trade Packages Comparison' window. The main window title is 'Willowdale Academy' with a total value of \$3,558,941 and a 0% difference. The interface includes a navigation bar with 'Summary', 'Add Quote', 'Pick', 'Temp', and 'Supplier' tabs. Below this is a table of items for 'Basement 2 Level Structure/Facade/Lobby - (101)'. The table has columns for 'Items', 'Quantity', 'Rates', 'Total', and 'Picked'. The total value for the items is \$3,895,478. The interface also includes a sidebar with a 'Comment' button and a 'Data saved 24 minutes ago' indicator.

*Trade Packages Comparison window*

From an empty Quote, you can add **Rates** and **Totals** which will be added together for the Total of those Items; this is called a **Calculated Total**. Alternatively, you can use a **Manual Total**, where you can enter a Total and then the Items underneath it will be marked as **INCL**; but each cell includes a value that calculates to the **Manual Total**.

	<b>13,884.21</b>
30	1,403.85
28	2,620.53
33	9,859.83

*An example of a Calculated Total*

	<b>9,600</b>
INCL	INCL
7.98	6,000
INCL	INCL

*An example of a Manual Total*

**INCL** can represent a value under a **Manual Total**, but under a **Calculated Total** it will always be equal to 0.

From the ribbon on the **Trade Packages Comparison** page you can navigate between different Trade Packages, pick winning Quotes, and calculate costs.



*The Ribbon on the Trade Packages Comparison screen*

The **Pick** button will let you pick any cell as a winning quote. You can select any one cell, a combination, or just by clicking the Supplier, you can pick all entered quotes by them.

By default, when you enter a **Rate** or **Total** in a quote it will be marked as a **Supplier Rate**; these costs will show in black. You can, however, mark a rate as a **Temporary Rate**, which will be used to calculate the **Plug** percentage of a quote. You can select any one cell or a combination, then click **Temp** to mark them as a **Temporary Rate**. A **Temporary Rate** will show as red. The same way that you can mark a cell as Temporary, you can mark it as Supplier, which will not use that cell when calculating a **Plug** percentage, and change the cell value to black.

	<b>21,429.97</b>
400	400
400	400
400	3,200
400	2,400
495	990
245	245
450	13,444.97
350	350

*An example of Supplier and Temp Rates*

You can type **INCL** or **EXCL** into a cell instead of entering a **Rate** or **Total**, you can also use the **INCL** and **EXCL** buttons. If you are using a **Manual Total**, then any cell with **INCL** can represent a value; however, if you are using a **Calculated Total** an **INCL** will equal 0. Any cell with **EXCL** will always equal 0.

	<b>18,000</b>		<b>20,057.2</b>
INCL	INCL	600	600
INCL	INCL	600	600
INCL	INCL	600	4,800
EXCL	EXCL	600	3,600
EXCL	EXCL	INCL	INCL
INCL	INCL	EXCL	EXCL
INCL	INCL	350	10,457.2
EXCL	EXCL	INCL	INCL

*An example of INCL and EXCL in a Manual Total and a Calculated Total*

You can use **Fill** to quickly copy cells from another Quote or its Adjustment or the Estimate. Just select the cells you want to insert other values in and then click **Fill**, and you can select where you want to copy cells from. When you use **Fill**, the values that are filled will be used to calculate the **Plug** percentage.

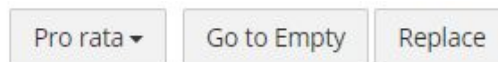
	20,057.2		17,826.48
600	600	889	889
600	600	549	549
600	4,800	299	2,392
600	3,600	70	420
INCL	INCL	550	1,100
EXCL	EXCL	200	200
350	10,457.2	454	13,564.48
INCL	INCL	350	350

*An example of Fill from Supplier and Fill from Estimate*

When filling from the Estimate, the **Rates** and **Totals** will be shown in blue, when filling from another Quote, the **Rates** and **Totals** will be shown in purple.

You can change how a Total is calculated with **Pro rata**. You will keep the same Total, but the Items under it will be recalculated as per the source you select, which can be the Estimate or another Supplier.

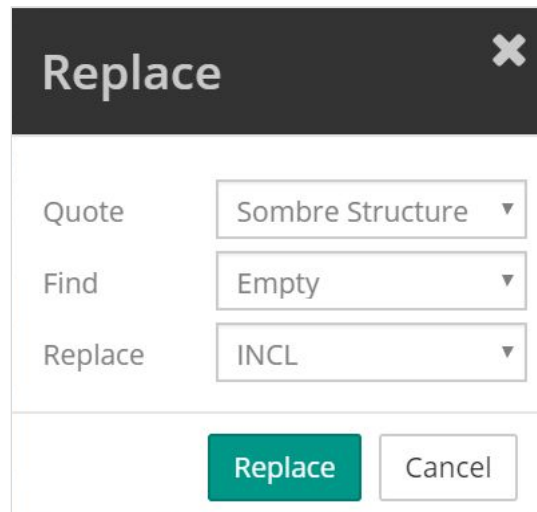
You can use **Go to Empty** to quickly go to the first empty cell for a Quote. By default, Empty cell is selected, so you can click on Go to directly.



*Go to Empty cell*

Once you have focus on the empty cell, as long as you enter a value, or INCL or EXCL, you can use **Go to Empty** to quickly go to the next empty cell. If you leave the cell unentered, then clicking **Go to Empty** will have no effect.

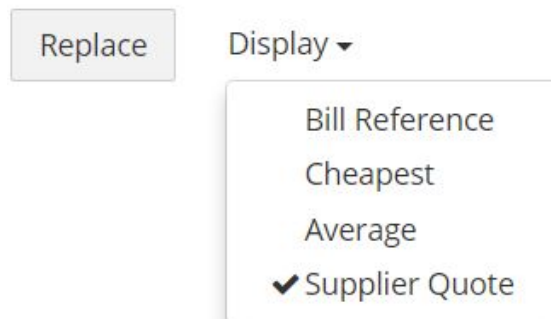
If you click **Replace**, the **Replace** window will open where you can choose any Quote from that Trade Package and replace any **Empty** Cells with **INCL**, **EXCL** or **Pro rata (Estimate)**.



*Replace window*

If you choose to **Pro rata from Estimate**, the **Total** field will be shown. You can enter a value in the Total field to prorate it from the Estimate.

You can use the **Display** options to show or hide columns.



*Display options*

By default, **Bill Reference**, **Cheapest**, **Average**, and **Supplier Quote** are unchecked. You can click on them to show those columns in your Trade Package **Comparison** page.

# Comparing Quotes

When you have one or more Quotes, you can easily compare them from the **Trade Package Summary** page. **Picked** will show the total of any picked Items, and it can include more than one Quote. You will also be able to see the **Cheapest** and **Average** totals from your Quotes. Your **Estimate** will show the Total estimated from Cubit, and in brackets you will see how many Items are within that Trade Package. Your Quotes will be listed underneath that in order of creation.

The Estimate Totals in the **Trade List** will change to the Picked Total of that Trade Package and appear green to let you know it is Picked.

The screenshot shows the BARTENDER software interface for a project named 'Juniper Academy'. At the top right, the total value is \$4,014,560 with a difference of +\$595,895 and a 56% completion rate. The main area is divided into three sections: a list of trade packages on the left, a comparison table in the center, and a list of quotes on the right. The comparison table shows 'Picked' at \$581,124, 'Cheapest' at \$400,000, 'Average' at \$532,420, and 'Estimate (41)' at \$527,069. The quotes list includes Crown (\$400,000), Cascade Construction (\$560,000), Bundaberg Builders (\$586,674), 4 Pines Construction (\$545,426), and Resch (\$570,000).

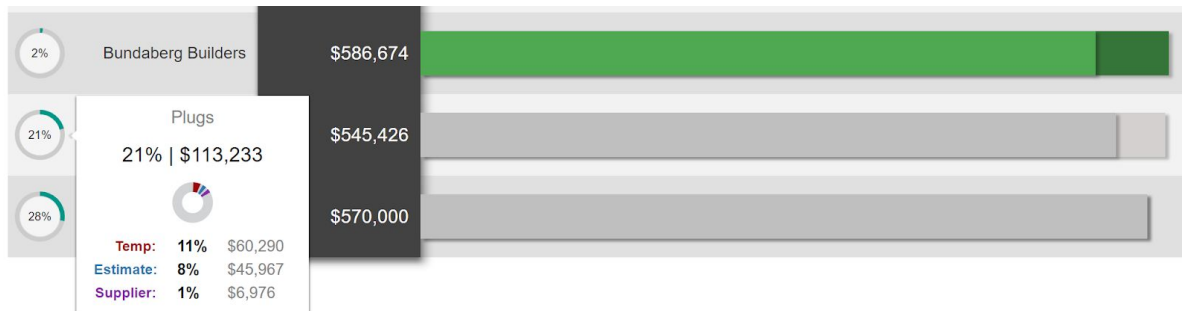
Trade Packages Summary page

Each Quote is represented as a new row, and hovering your mouse over a Quote will show you an overview of that Quote. You'll see a total broken down into **Quote** and **Adjustment**, if there are any unentered Items within that Quote and if any of those Items (or all of them) are Picked.

The screenshot shows a tooltip for the Bundaberg Builders quote. The tooltip displays the quote name, total value of \$586,674, the quote amount of \$529,500, and an adjustment of \$57,174. A note at the bottom of the tooltip states: 'All items entered. Some Items not Picked.'

Quote Tooltip

The **Plugs** graph will show for each individual **Quote** and against the **Picked** Total. This will display how much of the **Quote** or **Picked** is marked as a Plug. If you move your mouse over to the Plugs, you will see a breakdown of the Plugs, including the total value of the Plugs in any Quote and the breakdown of that Plug.

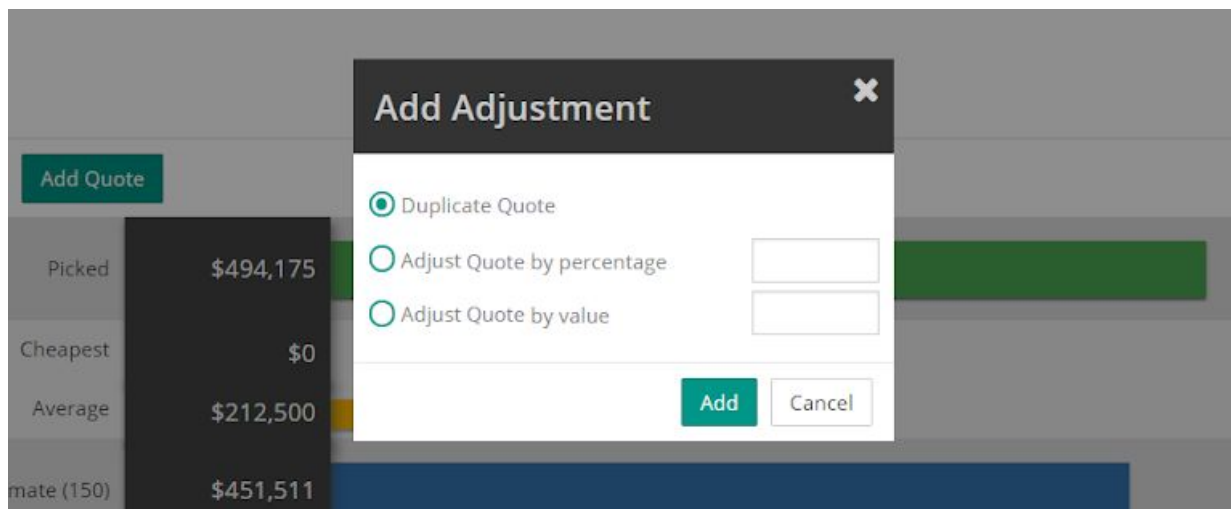


*Plugs Tooltip*

A warning icon will be shown against any **Quote** that has unentered Items, and a larger icon will be displayed when the **Picked** Total has some Items unpicked. These icons will also be shown in the Trade List.

From the **Trade Package Summary** page, you can also add an Adjustment to a Quote, which can better allow comparison between different Quotes. Click the vertical ellipses (three dots atop each other) on the right of any Quote, and select **Add Adjustment**. You can **Edit** or **Delete** an Adjustment from the same menu.

You will be able to **Duplicate Quote**, **Adjust Quote by percentage** or **Adjust Quote by value**.



*Add Adjustment window*

You can **Add Adjustment** from the **Trade Package Comparison** page, too. Click the down arrow at the top left of the Quote next to the **Supplier name**, and then click **Add Adjustment**. You can **Delete an Adjustment** from the same menu.



Supplier	INCL	EXCL	Fill	Pro rata	Go to	▼	Replace
<input checked="" type="checkbox"/> Reinhardt Construction			<input checked="" type="checkbox"/> Sombra Structure		<input checked="" type="checkbox"/> McCree Supply		
Rate	Total				Rate	Total	
10.04	10.04				17	17	
273.07	273.07		INCL	INCL	231	231	
148.98	148.98		INCL	INCL	INCL	INCL	

*Add Adjustment from Trade Package Comparison page*

By default, when you **Add Adjustment**, only the Adjustment Quote will show in the **Trade Package Comparison** page. You can see the Quote and Adjustment Quote side by side if you click **Display** and check **Supplier Quote**.

# Reviewing Trade Packages

If you click **Review** you will be taken to the **Review** page, which will allow you to see all the Trade Packages, as well as Submitted and Picked Quotes.

You can click on the name of a **Trade Package** to go to that Trade Package. For each Trade Package you will see the **Estimate** from **Cubit** and all of your entered Quotes. If you have picked a Supplier, it will have a teal background. If you have picked more than one Quote for a Trade Package you will also see a new Quote called **Combined**, which combines the picked Items into one Quote to review.

The **Opp** column will show the Opportunity; which is the difference between the picked Quote and the Cheapest. By default, you will see the **Plugs** column, which will show the total **Plugs** for the Picked Items for a Trade Package. If you want to see the **Cover** of a Job (the opposite of Plugs) you can click on the **Plugs** heading.

The **Diff** column will show the difference between the Estimate and Picked, and the **Picked** column will show the Picked total.

You can add a further adjustment to a Trade Package from the **Adj** column. When sending picked rates to Cubit, any adjustment here will be pro rated to all picked Items within that Trade Package.

The screenshot shows the BARTENDER software interface. At the top, there's a navigation bar with 'BARTENDER Jobs' and a user profile icon. Below that, the project name 'Willowdale Academy' is displayed, along with a 'Review' tab and a 'Reports' tab. A summary box on the right shows a total of \$3,492,014, a difference of -\$66,927, and a closing date of Nov 14, 2017, with a 0% progress indicator.

Trade Packages	Estimate	S1	S2	S3	S4	Opp	Plugs	Diff	Picked	Adj	Total
1 Basement 2 Level Structure/Facade/Lobby...	\$892,966	Reinhardt Co... \$361,289	Sombre Stru... \$588,450	McCree Supply \$1,706,529		\$7,289	4%	-\$11,677	\$881,289		\$881,289
2 Level 1 Structure/Facade/Lobby - (102)	\$451,511	McCree Supply \$0	Reinhardt Co... \$494,175			\$69,175	0%	\$42,664	\$494,175		\$494,175
3 Level 2 Structure/Facade/Lobby - (103)	\$434,735	McCree Supply \$0	Sombre Stru... \$430,692			\$692	0%	-\$4,042	\$430,692		\$430,692
4 Level 3 Structure/Facade/Lobby - (104)	\$581,472						0%				\$0
5 Roof - (105)	\$111,268	Kaplan \$35,000	Winston Roo... \$98,000	Tom Holden... \$109,300	Oz Roofs \$112,500	\$74,800	20%	-\$1,468	\$109,800		\$109,800
6 Transportation Services - (106)	\$63,000						0%				\$0
7 External Works/ Landscaping - (107)	\$367,964						0%				\$0
8 Site Preparation - (108)	\$3,795						0%				\$0
9 Design/ Authority Fees - (109)	\$0						0%				\$0
10 Contingency - (110)	\$0						0%				\$0
11 Preliminary & General Costs - (111)	\$490,498						0%				\$0

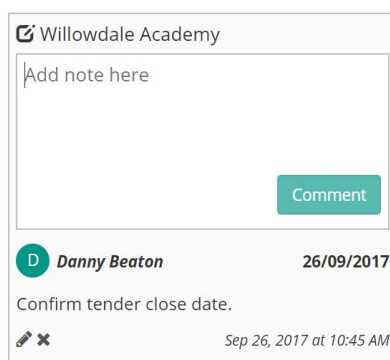
The sidebar on the right shows a comment history for 'Basement 2 Level Structure/Facade...'. It includes a comment from Denny Beaton on 28/09/2017: 'Update Sprinklers in the Estimate.' and another from Denny Beaton on 28/09/2017: 'Confirm Excavation Rate for Reinhardt Construction.'

Review page

# Adding Notes

You can add **Notes** to a Job, to a Trade Package, and comment directly on a cell.

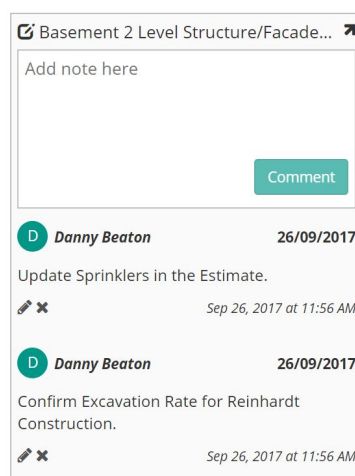
From the **Details** and **Reports** pages of a Job, the **Notes** pane on the right will allow you to make a Note for the Job.



*An example Note from the Details page.*

Type any notes or comments where the text reads **Add note here**, and then click **Comment**. Your Note will be saved with your user name, and the time and date the Note was added. You can edit the Note with the **pencil** icon or delete a Note with the **cross** icon.

When adding a **Note** to the **Trade Package Summary** or **Comparison** page, the Note will be created to the currently selected Trade Package. From the **Review** page, the Note also reflects the selected Trade Package. Also from the **Trade Package Comparison** and **Review** pages, you can minimise the **Notes** pane by clicking the minimise arrow at the top right corner of the pane.



*An example Note from the Details page.*

# Reporting from Bartender

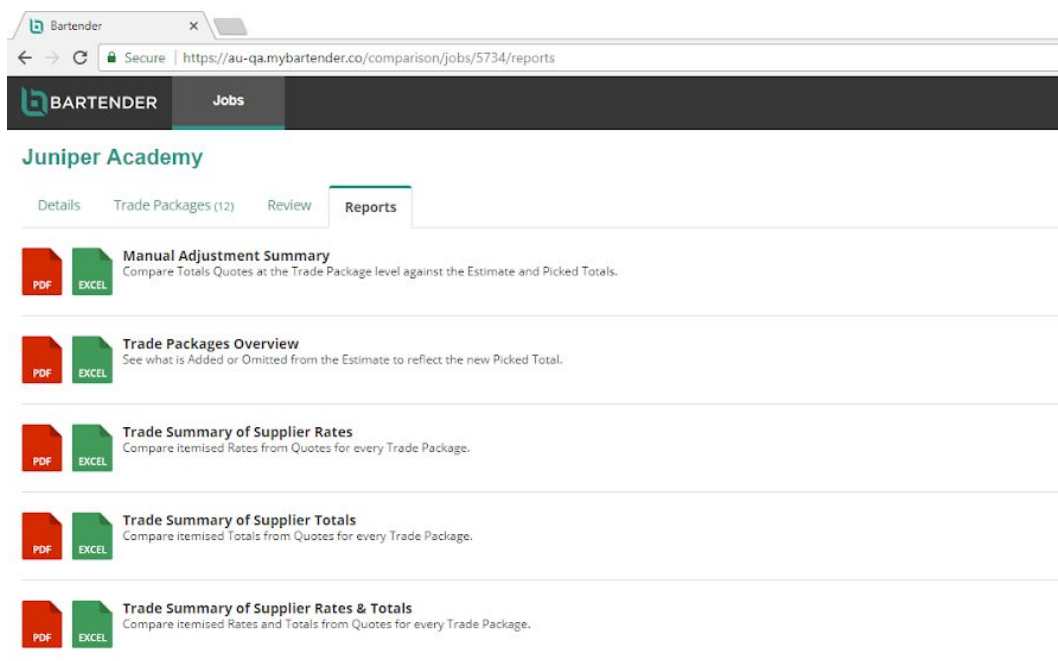
If you click the **Report** tab under a Job, you will be taken to the **Reports** page, where you can access the various reports you can use from Bartender and access any Notes for that Job.

You will be able to generate a **Manual Adjustment Summary**, a **Trade Packages Overview** and a **Trade Summary** (focussing on Rates, Totals or both.) There is also a brief description of each report type.

You also have the option beside each report to generate a **PDF** or **EXCEL** version of each report. There are some differences between two generated types.

**PDF** reports are perfect for printing and having a print ready format. Only **PDF** reports include a header (with Job name, Client Name, and Job Description), a footer (page numbers, generated by information) and the column names are carried over on each page.

**EXCEL** reports for **Manual Adjustment Summary** and **Trade Packages** use SUM Totals for some columns, so you can easily see how changes affect your Totals. **EXCEL** reports do not include headers, footers, Job details or carry over columns when printing.



*Reports page*

# Manual Adjustment Summary

The **Manual Adjustment Summary** is a report that closely resembles the **Review** page for a Job. This report is best used to compare Quote totals at the Trade Package level against the Estimate and Picked Packages totals.

The **PDF** report will show up to 8 Quotes.

**Manual Adjustment Summary**

Job: Willowdale Academy Client: Buildsoft Constructions

Description:

Trade Packages	Estimate	S1	S2	S3	S4	S5	Opp	Cover	Plugs	Diff	Picked	Adj	Total	
1 Basement 2 Level Structure/Facade/Lobby - (101)	892,966	McCree Su... 579,647	Martini B... 841,916	Sombre SL... 898,000	Reinhardt... 900,000	0	0	100%	0%	0	0	10,000	10,000	
2 Level 1 Structure/Facade/Lobby - (102)	433,207	McCree Su... 0	Reinhardt... 497,098	0	0	0	72,098	100%	0%	63,891	497,098		497,098	
3 Level 2 Structure/Facade/Lobby - (103)	430,009	McCree Su... 0	Sombre SL... 430,700	0	0	0	700	100%	0%	691	430,700	15,000	445,700	
4 Level 3 Structure/Facade/Lobby - (104)	581,472	0	0	0	0	0	0	100%	0%	0	0		0	
5 Roof - (105)	111,268	Kaplan 35,000	Winston R... 98,000	Tom Holde... 109,800	Oz Roofs 112,500	Combined 144,800	109,800	85%	15%	33,532	144,800		144,800	
6 Transportation Services - (106)	63,000	0	0	0	0	0	0	100%	0%	0	0		0	
7 External Works/ Landscaping - (107)	367,964	Kaplan 0	Orissa La... 156,007	0	0	0	-193,993	100%	0%	-211,957	156,007		156,007	
8 Site Preparation - (108)	3,795	0	0	0	0	0	0	100%	0%	0	0		0	
9 Design/ Authority Fees - (109)	0	0	0	0	0	0	0	100%	0%	0	0		0	
10 Contingency - (110)	0	0	0	0	0	0	0	100%	0%	0	0		0	
11 Preliminary & General Costs - (111)	490,498	0	0	0	0	0	0	100%	0%	0	0		0	
12 Margin - (112)	161,733	0	0	0	0	0	0	100%	0%	0	0		0	
<b>Summary</b>	<b>3,535,911</b>							<b>-11,395</b>	<b>98%</b>	<b>2%</b>	<b>-113,842</b>	<b>1,228,605</b>	<b>25,000</b>	<b>1,253,605</b>

Page 1 of 1 Generated by Bartender (Buildsoft Pty Ltd)

Manual Adjustment Summary (PDF)

There is no limit to the Quotes that will be shown in the **EXCEL** report.

Trade Packages	Estimate	S1	S2	S3	S4	Opp	Cover	Plugs	Diff	Picked	Adj	Total
1 Basement 2 Level Structure/Facade/Lobby - (101)	892,966	Reinhardt Const... 842,289	Sombre Structure 898,000	McCree Supply 1,700,520	7,289	96%	4%	-11,677	881,289	10,000		891,289
2 Level 1 Structure/Facade/Lobby - (102)	433,207	McCree Supply 0	Reinhardt Const... 494,175	69,175	100%	0%	0%	-42,664	494,175			494,175
3 Level 2 Structure/Facade/Lobby - (103)	430,009	McCree Supply 0	Sombre Structure 430,692	692	100%	0%	0%	-4,042	430,692	15,000		445,692
4 Level 3 Structure/Facade/Lobby - (104)	581,472	0	0	0	0	0	0	0%	0%	0		0
5 Roof - (105)	111,268	Kaplan 35,000	Winston Roofing... 98,000	Tom Holden Roof... 109,800	Oz Roofs 112,500	74,800	80%	20%	-1,468	109,800		109,800
6 Transportation Services - (106)	63,000	0	0	0	0	0	0	0%	0%	0		0
7 External Works/ Landscaping - (107)	367,964	0	0	0	0	0	0	0%	0%	0		0
8 Site Preparation - (108)	3,795	0	0	0	0	0	0	0%	0%	0		0
9 Design/ Authority Fees - (109)	0	0	0	0	0	0	0	0%	0%	0		0
10 Contingency - (110)	0	0	0	0	0	0	0	0%	0%	0		0
11 Preliminary & General Costs - (111)	490,498	0	0	0	0	0	0	0%	0%	0		0
12 Margin - (112)	161,733	0	0	0	0	0	0	0%	0%	0		0
<b>Summary</b>						<b>151,956</b>	<b>97%</b>	<b>3%</b>	<b>25,477</b>	<b>1,915,956</b>	<b>25,000</b>	<b>1,940,956</b>

Manual Adjustment Summary (Excel)

# Trade Packages Overview

The Trade Packages Overview is a report that shows the added or omitted picked Totals as they compare to the Estimate. It also shows the plug percentage and the Trade adjustments.

Trade Overview						
Job: Willowdale Academy			Client: Buildsoft Constructions			
Description:						
Trade Packages	Estimate	Add	Omit	Plugs	Adj	Picked
1 Basement 2 Level Structure/Facade/Lobby - (101)	\$892,966	\$347,825		10%	\$10,000	\$1,250,791
2 Level 1 Structure/Facade/Lobby - (102)	\$433,207		\$63,891			\$369,316
3 Level 2 Structure/Facade/Lobby - (103)	\$430,009	\$691			\$15,000	\$445,700
4 Level 3 Structure/Facade/Lobby - (104)	\$581,472					
5 Roof - (105)	\$111,268	\$33,532		15%		\$144,800
6 Transportation Services - (106)	\$63,000					
7 External Works/ Landscaping - (107)	\$367,964		\$211,957			\$156,007
8 Site Preparation - (108)	\$3,795					
9 Design/ Authority Fees - (109)	\$0					
10 Contingency - (110)	\$0					
11 Preliminary & General Costs - (111)	\$490,498					
12 Margin - (112)	\$161,733					
<b>Summary</b>	<b>\$3,535,911</b>	<b>\$382,048</b>	<b>\$275,848</b>	<b>6%</b>	<b>\$25,000</b>	<b>\$2,366,613</b>

Page 1 of 1 Generated by Bartender (Buildsoft Pty Ltd)

## Trade Packages Overview (PDF)

The formulas calculating the Total will be maintained in the Excel export.

Trade Packages	Estimate	Add	Omit	Plugs	Adj	Total
Basement 2 Level Structure/Facade/Lobby - (101)	\$892,966	\$347,825		10%	\$10,000	\$1,250,791
Level 1 Structure/Facade/Lobby - (102)	\$433,207		\$63,891			\$369,316
Level 2 Structure/Facade/Lobby - (103)	\$430,009	\$691			\$15,000	\$445,700
Level 3 Structure/Facade/Lobby - (104)	\$581,472					
Roof - (105)	\$111,268	\$33,532		15%		\$144,800
Transportation Services - (106)	\$63,000					
External Works/ Landscaping - (107)	\$367,964		\$211,957			\$156,007
Site Preparation - (108)	\$3,795					
Design/ Authority Fees - (109)	\$0					
Contingency - (110)	\$0					
Preliminary & General Costs - (111)	\$490,498					
Margin - (112)	\$161,733					
<b>Summary</b>	<b>\$3,535,911</b>	<b>\$382,048</b>	<b>\$275,848</b>	<b>6%</b>	<b>\$25,000</b>	<b>\$2,366,613</b>

## Trade Overview Report (Excel)

# Trade Summary

The **Trade Summary** is a report detailing the Estimate, Quotes and Picked total for every Item in all Trade Packages. There are 3 types of **Trade Summary** reports you can generate, **Trade Summary of Supplier Rates**, **Trade Summary of Supplier Totals** and **Trade Summary of Supplier Rates & Totals**.

The **PDF** report will show up to 8 Quotes.

**Trade Summary of Supplier Rates and Totals**

Job: Willowdale Academy Client: Buildsoft Constructions

Description:

Item	Qty	Rate	S1	S2	S3	S4	S5	S6	S7	S8	Picked
Bill Ref		Total									
Basement 2 Level Structure/Fa...											
Carpark linemarking											
3	175.50 m	1.25	1.11	1.22	1.18	1,258.01	1.63	INCL			2.47
		219.38	195.00	214.72	207.35	220,781.41	286.21	INCL			434.09
Carpark linemarking											
4	26.00 no	15.00	13.33	14.68	14.18	15,096.16	19.57	INCL			29.68
		390.00	346.67	381.72	368.61	392,500.28	508.82	INCL			771.72
Symbols											
5	29.00	35.00	31.11	34.26	EXCL		45.66	INCL			69.26
		1,015.00	902.22	993.44	EXCL		1,324.23	INCL			2,008.44
Tiles to lobby (PC \$25/m2 supply)											
6	15.54	25.00	INCL	24.47	29.00	25,160.27	32.62	INCL			25,209.74
		388.61	INCL	380.36	450.79	391,100.53	507.00	INCL			391,869.50
Tiles to lobby (PC \$25/m2 supply)											
7	1.55	25.00	INCL	24.47	29.00	25,160.27	32.62				25,209.74
		38.86	INCL	38.04	45.08	39,110.05	50.70				39,186.95
Tiles to lobby (PC \$25/m2 supply)											
8	15.54	50.00	INCL	48.94	29.00	50,320.55	65.23	INCL			50,419.49
		777.22	INCL	760.71	450.79	782,201.06	1,014.00	INCL			783,738.99

Page 1 of 77 Generated by Bartender (Buildsoft Pty Ltd)

Trade Summary with Rates and Totals (PDF)

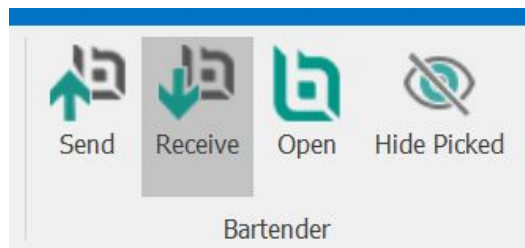
There is no limit to the Quotes that will be shown in the **EXCEL** report.

The screenshot shows an Excel spreadsheet with the following columns: Item, Qty, Rate, S1, S2, S3, S4, S5, S6, S7, S8, and Picked. The data is organized into rows for different trade items, such as Bulk Excavation, 450 thick base to core, and various concrete and steel items. Each row lists the item name, quantity, and rate, followed by up to eight columns representing different supplier quotes (S1-S8) and a final 'Picked' column. The spreadsheet is displayed in a standard Excel interface with the ribbon and grid visible.

Trade Summary Report (Excel)

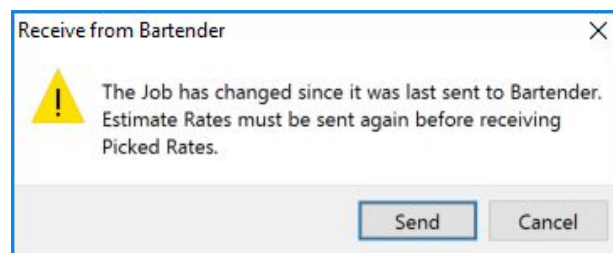
# Receiving Picked Quotes to Cubit

As long as you have one or more Items picked, you can receive your **Picked Rates** back into your Cubit. To receive your Job from Cubit, click **Receive** from the **Bartender** group in the **Home** tab in the ribbon.



*Receive a Job in Cubit*

If your Job in Cubit has been changed after it was last sent to Bartender, you will be asked to Send your Estimate to Bartender.



*Receive a Job in Cubit*

Before you receive a Job from Bartender, a **Receive Bartender Job** window will open. You will see the **Bartender Name**, the **Picked** total, the **Picked Difference**; which is the difference between the current and previous received **Bartender Job**. You will also see the **Total** of the Estimate as in Cubit; and **Last Received** date and time.



*Receive Bartender Job*



The Picked Rates received from Bartender will show in teal in the **Rate** or **Total** columns of the **Estimate View** and the **Grouped View** in Cubit.

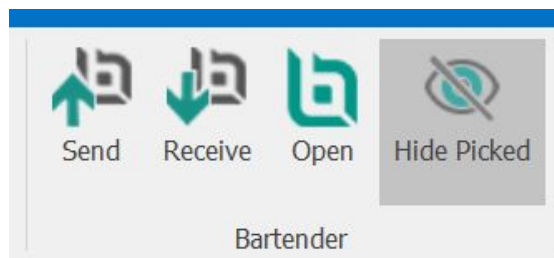
Calculation sheet | Rate sheet

Concrete > Substructure > 450 thick base to core

	Description	No.	Quantity	Unit	Rate	Markup	Total
1	Blinding	0.05	0.07	m3	137.59		0.48
2	Labour to blinding		1.00	m2	15.84	10%	17.42
3	Concrete		0.45	m3	143.53		64.59
4	Waste		0.05		143.53		6.46
5	Reo	0.12	0.45	t	1,168.04		63.07
6	Chairs		0.01		1,168.04		15.77
7	Reo Fix	0.12	0.45	t	853.27		46.08
8	DPC		1.00	m2	0.99		0.99
9	sand blinding		1.00	m2	5.36		5.36
10	Labour to place		1.00	m2	34.65	10%	38.11
11	Pumping		0.45	m3	64.34		28.95
12	Waterstop		1.14	m	59.39		67.88
13	Tanking		1.00	m2	27.72		27.72
14	Sump		1.00	Item	247.47		247.47
15	Delivery		1.00	no	98.99		98.99

*An example of Picked Rates in Cubit*

You can hide your Picked Rates by clicking **Hide Picked** from the **Bartender** group in the **Home** tab in the ribbon.

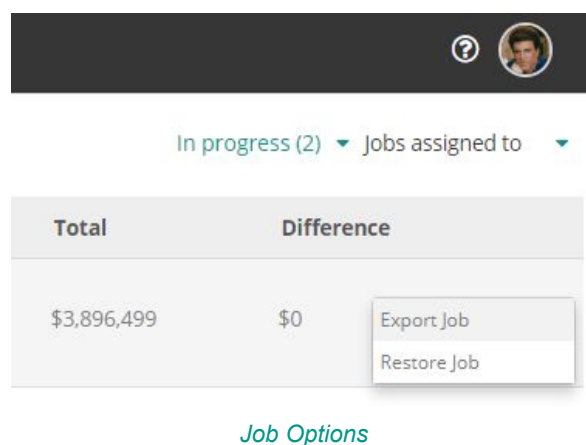


*Hide Picked*

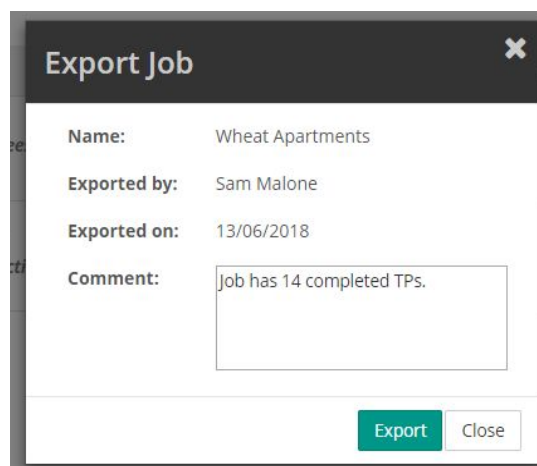
# Restoring a Job

You can export and restore your Bartender Job at anytime from the **Jobs** page. Restoring a Job will return a Job only to a previous version of that Job, and will update your Estimate, Quotes and Picked Suppliers.

You can export and restore any Job from the **Jobs** page. You can access **Export Job** and **Restore Job** from the Options of any Job, which appear from the vertical ellipsis on the far right of each Job.



When exporting a Job, **Name**, **Exported by**, and **Exported on** will be provided for you. You can add any details or notes for that Job to the **Comment** field. This **Comment** will be displayed if you restore the Job with this exported version.



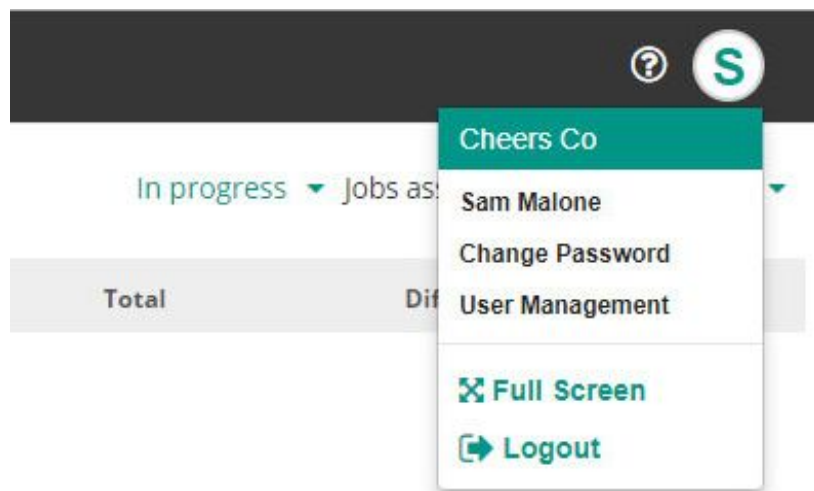
Exporting a Job

A restored Job will maintain its connection to Cubit. Even though the Estimate will now reflect that when the Job was restored, when you Update Job from Cubit, your Estimate will be updated.

# Managing Users

An **Admin** can manage the Users associated to that account. There are no limits to how many users can be set as an **Admin** to an account, but an account must have at least 1.

Only an **Admin** will be able to access the **Users** page, this page can be accessed by clicking the account menu, which appears at the top right of your Bartender page.



*Account Menu*

The **User Management** page will list all Users created for your account, by default only Active Users will be displayed. You will see a number of fields for each Users, including **Name**, **Email**, **Last Active** date and time, **Account Type**, assigned **Jobs**, **Created** date, **Verified Status** and **Account Status**.

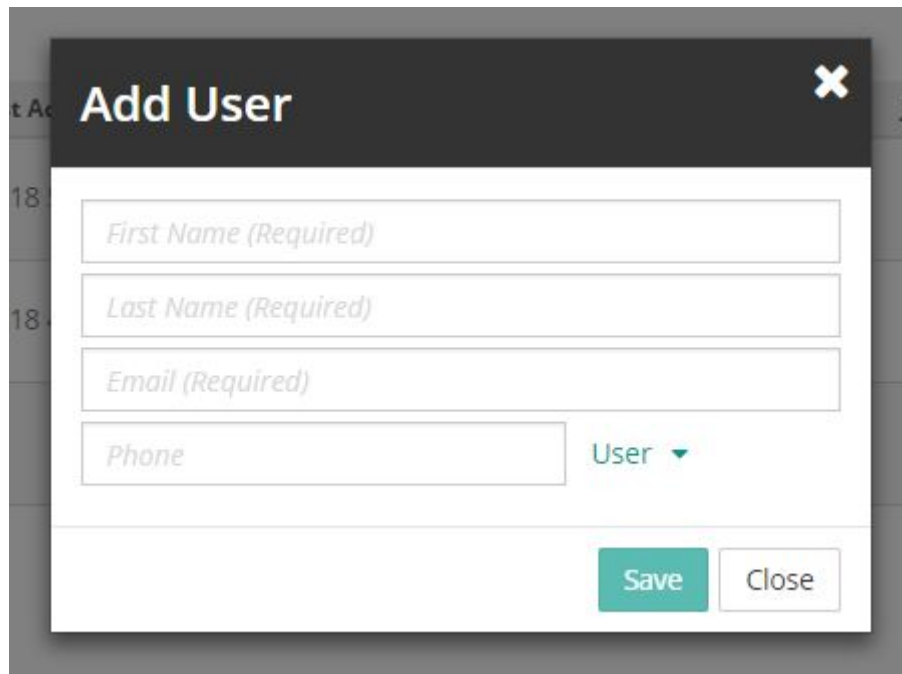
A screenshot of the Bartender web application's User Management page. The page shows a table of users with columns for Name, Email, Last Active, Type, Jobs, Created, Verified, and Status. There are four users listed: Sam Malone (Admin), Diane Chambers (User), Woody Boyd (Manager), and Norm Petersen (User). Each user has a 'Resend' button next to their 'Verified' status.

Name	Email	Last Active	Type	Jobs	Created	Verified	Status
Sam Malone	sam@cheersco.com.au	13/06/18 4:29 PM	Admin	1	13/06/2018	<input checked="" type="checkbox"/>	Active
Diane Chambers	dinane@cheersco.com.au	13/06/18 4:28 PM	User	3	13/06/2018	<input checked="" type="checkbox"/>	Active
Woody Boyd	woody@cheersco.com.au		Manager	0	13/06/2018	<input type="checkbox"/> Resend	Active
Norm Petersen	norm@cheersco.com.au		User	0	13/06/2018	<input type="checkbox"/> Resend	Active

*User Management page*

Next to the **Add User** button, you will see a message indicating how many activated users your account has, if you have an available spot you can add a new User.

When you click **Add User**, a new window will appear. To create a new User you will be required to enter a **First Name**, **Last Name** and **Email**. You can include a phone number if you want, too. By default any User you create will also be created as a User, you can change this to Manager or Admin.



The image shows a modal window titled "Add User" with a close button (X) in the top right corner. The window contains four input fields: "First Name (Required)", "Last Name (Required)", "Email (Required)", and "Phone". To the right of the "Phone" field is a dropdown menu currently set to "User". At the bottom right of the window are two buttons: "Save" (highlighted in green) and "Close".

*Add User window*

# Shortcut Keys

We have introduced a few shortcut keys to help you get around Bartender and help with some simple actions.

The available shortcut keys will work on the **Trade Packages** page.

Quote Actions		Navigating Actions	
Add Quote:	<input type="button" value="a"/>	Change View:	<input type="button" value="v"/>
Pick or unpick:	<input type="button" value="p"/>	Go to next Trade Package:	<input type="button" value="]"/>
Mark as INCL:	<input type="button" value="i"/>	Go to previous Trade Package:	<input type="button" value="["/>
Mark as EXCL:	<input type="button" value="e"/>		

We will be looking at implementing more as we go, so you can more easily build and compare Quotes.