



**Operational House Production and Sales System Overview**

*The Summit 5000 House Production and Sales solution is a module that offers specific operational control of the planning, development and sales process. The solution integrates with the financial suite providing the framework for reporting both corporate and development performance.*

**House Type Maintenance & Estimating**

Summit 5000 enables multiple versions of a standard or generic house type to be created. For example a regional and site specific house variant can be produced from the initial standard. In addition, defaults can be set for subcontract work packages and build plans which are copied to the variants for adjusting to suit the specific scheme or development. This process can automatically build up a resource schedule and budget for the house type, development phase or scheme. Summit 5000 includes infrastructure cost estimating and integrates with the Summit 5000 Planning & Procurement module as well as industry standard project planning packages. Budget and forecast costs automatically update the Summit 5000 costing system.

**Site Planning and Production**

Site production allows you to configure a development. A site can be made up of a number of phases, and any number of revisions of a phase can be created, which might contain different mixes of house types and number of plots.

The system has a Site Mix file and a Plot Mix file which are made up of user definable fields that can be used to capture information from elsewhere in the system, allow manual input, or calculate a result based on combining information held in other fields. This data can then be reported on using standard or user definable crystal reports, or viewed in the system to compare the effect for example of different site mixes, or capture particular development information. Examples of the type of data you might wish to hold could include anticipated selling price, square footage, target available dates, planning approval information, plot options and customer choices, sales stage, build stage, revenue per square foot, key dates, selling agents and solicitor information

A site estimate and budgets can be created automatically by the system allocating fully detailed house types to specific plots. Plot specific changes can be applied based on customer requirements, site restrictions or planning requirements. The system includes settings which allow defaults to be applied to house type specific changes if required, a change to a house type on an individual plot can feed through to all other plots on the site which will incorporate the same house type.

The system can automatically create subsidiary plot contracts if required allowing budgets and cost information to be maintained and monitored at plot level as well as site/development level

**Planning, Scheduling and Procurement**

The system incorporates a workplan for each development based on user defined stages for each plot and non plot related elements of the site. The workplan is created automatically as part of the site production process and can be exported to project planning software such as Microsoft Project.

Project scheduling can be carried out in MSP or other project planning applications and can be imported back to update the summit project workplan



Using the workplan, Summit 5000 can produce a buying schedule which incorporates a buying list with 'required by dates' based on the project plan. This information is then immediately available in the Summit 5000 Procurement module, with an option to raise orders automatically or manually as required.

The procurement suite is updated if the development plan is modified for things like increases in item prices and quantities, required delivery dates, changes of supplier etc. It also caters for these changes based on the order status such as ordered part delivered and part invoiced, allowing automatic raising of order amendments.

### Plot Valuations

Tick sheet valuations can be entered at user defined stages for each plot on the site. This can be entered manually or the valuation carried out on site using a mobile device and uploaded to the system. Budgets for each of the user defined stages can be created and modified based on the Site estimate template, and a development summary used to monitor site performance against latest budget, current site valuation and costs including accruals.

The tick sheet site valuation can be used to automatically generate the individual subcontract valuations, which can then be individually amended as part of the payment process described below

### Subcontractor Valuations and Management

This handles all elements of subcontractor management including subcontract enquiries, tendering, comparisons and subcontract ordering and includes a fully detailed subcontractor database. Detailed subcontract orders can be generated based on a selected subcontractor in the site estimate, with a minimum of user input required or can be manually created as required. The module automatically updates the order commitments to the project ledger. As work progresses detailed valuations can be entered for each of the trade packages on the development, automatic updates of the project ledger occur at key stages of the valuation process to update a provision and actual cost when the payment is processed.

Summit 5000 manages all subcontractor payments including certificates, incorporating all CIS legislation and produces a plot payment summary. Final updates of actual costs are processed into the project ledger.

A user definable Approval process can be used to manage the flow of the valuation process through to payment

### Housing Sales

This module is an extension to the core Summit 5000 sales ledger and handles the house sale transactions including reservations, deposits, completion statements, extras and disbursements. Housing sales automatically updates all plot records from sales transactions and gives the commercial and sales & marketing teams an up to date status on every plot. It includes a user definable database extension which enables sales & marketing information to be captured and reported upon.