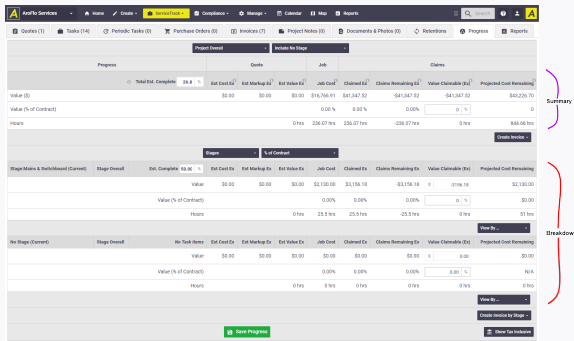


Project Progress

The Progress tab provides a summary of the project's estimated progress, contract values (cost and sell), expenditure, invoiced claims and variations. It is designed to help you track costs against a contract value.

There are three different views that allow you to drill down and track costs against each stage, tracking centre (if configured) or line item types (Labour, Material and Expenses). You can also choose to manage and invoice progress claims based on task actuals, or a percentage of the contract value.



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 - [Task Actuals](#)
 - [% of Contract](#)
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Webinars

Related articles

- [Project Templates](#)
- [Project Task Variations](#)
- [Project Retentions](#)
- [Manage Projects](#)
- [Create a Project](#)

Progress views

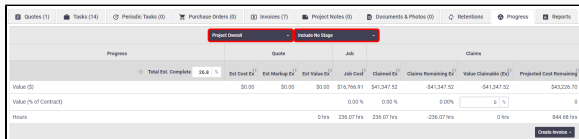
There are three types of progress views which calculate values based on:

- **Project Overall** - approved contract (quote) and variation total (ex. GST).
- **Contract Only** - approved contract (quote) total (ex. GST).
- **Variations Only** - approved variations total (ex. GST).



Include No Stage

By default, AroFlo includes values in items not linked to a specific stage. If you want to exclude these, select **Exclude No Stage** from the dropdown. See [below](#) for information for non-staged items.



Column Label	Calculation value	Description
Progress - Est. Complete (% of Contract only)	A	Use the open fields within this column to manually enter an estimate of the completed per stage.

i How is Total Est. Complete calculated?

The Total Est. Complete percentage for the project is a weighted average of the estimated completion for each stage.




T o r e c o r d e s t i m a t e d p r o

Progress		
Total Est. Complete 26.8 %		
Value (\$)		
Value (% of Contract)		
Hours		
Stage:Mains & Switchboard (Current)	Stage Overall	Est. Complete 50.00 %
Value		
Value (% of Contract)		
Hours		
Stage:Basement Carpark (Current)	Stage Overall	Est. Complete 25.00 %

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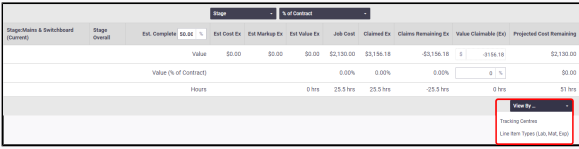
Of Contract Value . Tasks are used to record project costs. Without a Task for the stage, no progress can be made.

Quote - Est Cost Ex	B	The cost (ex. GST) to your business at the time of the approved quote. E approved quote.
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Quote - Est Markup Ex	C	The combination of markups at the time of the approved quote. Based on approved quote.  This is an aggregation of quote line item markups. There may be differences between this value and the quote profit, such as using quote line items with a sell value and a zero cost value.
Quote - Est Value Ex	$D = B + C$	The quoted value that was approved by your client.
Job - Job Cost	E	The actual job costs recorded to date. These costs are based on labour, recorded in Tasks linked to this Project.
Claims - Claimed Ex	F	The amount (ex. GST) you have claimed to date based on previous invoices.
Claims - Claims Remaining Ex	$G = D - F$	How much you can still claim (ex. GST). This is based on the approved contract amounts you have already claimed to date.
Claims - Amount Claimable Ex	H	The suggested amount to claim on your next Invoice. This is calculated based on the current date or the estimated completion minus previous claims. The suggestion is used when creating an invoice.
Claims - Projected Cost Remaining (% of Contract only)	$(I = (E/A) - E)$	An estimate of the remaining job costs you may incur, based on the current project progress made.  Example You have job costs of \$750, and you estimate the project is 75% complete. So the projected cost to complete the work is \$250.
Claims - Estimated Cost Remaining (Task Actual only)	$L = B - E$	An estimate of what you can still afford to spend before it impacts on your margins. This is your contract (quote) cost minus current job costs.  Example You have job costs of \$750. Your estimated contract cost was \$800. With markups, your client signed off on a contract value of \$1200. The estimated costs you have remaining is \$50. After that, your margins will be reduced.

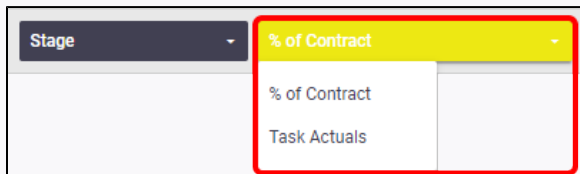
Progress breakdown

You can drill down further by selecting to view project values for each by stage, tracking centre or line item types.

View	Description
Stage	<p>View the project based on stages.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>i A non-staged section will also display. This is for quotes and variations linked to the project, rather than a specific stage within it. You can always add, remove or close stages using the Edit Project button in the header.</p> </div> <p>Stage breakdown</p> <p>When viewing a progress breakdown by stage, you can also use View By... to further break it</p> 
Tracking Centre	<p>View the progress breakdown based on Tracking Centres (if configured).</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px; background-color: #e6f2e6;"> <p>✓ Example</p> <p>Tracking centres within a project might be contracted works such as Light and Power, Data & Comms, Access Control etc.</p> </div>
Line Item Types (Lab, Mat, Exp)	<p>View the progress breakdown based on Labour, Material and Expenses.</p>

Progress calculation methods

Depending on how you manage projects, the Progress tab features two additional views that are used for calculating progress claims.



Task Actuals

This view uses the job costs incurred as a basis to calculate a suggested claim amount for the next invoice. It is designed to enable you to charge for job costs incurred since the last Invoice (regardless of progress on the project).

Stage: Matrix & Dashboard	Open	Stage Overall	Est Cost Ex	Est Markup Ex	Est Value Ex	Job Cost	Claimed Ex	Claims Remaining Ex	Cost Claimable (Ex)	Estimated Cost Remaining
Value	\$3,700.00	\$900.00	\$4,600.00	\$500.00	\$0.00	\$4,600.00	\$0.00	\$0.00	\$4,600.00	\$4,500.00
Value (% of Contract)	10.80%	0.00%	100%	10.80%	0.00%	100%	0.00%	0.00%	10.80%	97.19%
Hours	15 hrs	15 hrs	0 hrs	0 hrs	0 hrs	0 hrs	0 hrs	0 hrs	0 hrs	0 hrs

% of Contract

This view allows you to enter a percentage for calculating a progress claim invoice. It provides more flexibility and is designed for invoicing claims based on a percentage of the approved contract.

Stage: Matrix & Dashboard	Open	Stage Overall	Est Cost Ex	Est Markup Ex	Est Value Ex	Job Cost	Claimed Ex	Claims Remaining Ex	Value Claimable (Ex)	Projected Cost Remaining
Value	\$3,700.00	\$900.00	\$4,600.00	\$500.00	\$900.00	\$4,600.00	\$0.00	\$4,600.00	\$900.00	\$4,500.00
Value (% of Contract)	10.80%	0.00%	100%	10.80%	0.00%	100%	0.00%	0.00%	10.80%	97.19%
Hours	15 hrs	15 hrs	0 hrs	0 hrs	0 hrs	0 hrs	0 hrs	0 hrs	0 hrs	0 hrs

Using this view, the Claim Amount % becomes an editable field. You can use this to update the percentage of progress you wish to claim for.

A claim percentage can be set for each stage, each Tracking Centre, or the project as a whole.



Example

In the example above, it is estimated the stage is 10% complete. The Claim Amount has been adjusted to be 10%. With a Contract Value of \$4,630.00, this results in a proposed claim amount of \$463.00.

Create a claim

Once you have chosen to manage the project by Task Actuals or by % of Contract, you can create a progress claim directly from this screen. To learn more, see [Progress Claims](#).