

# Projects

Capital Project Budgeting, RFP Bidding, Status Tracking, and Analytics

## What Is It?

By centralizing the planning, bidding, and tracking of complex work plans, ServiceChannel Projects helps you manage and execute capital projects more efficiently at lower cost.

Identify potential improvement projects, scope tasks, request competitive quotes, collect approvals, track budgets, and then analyze your results. The Projects module connects your strategic capital planning process to your tactical work order execution, so you have complete visibility and control from budget to spend.

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## Who Is It For?



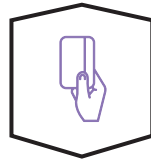
Facility  
Managers



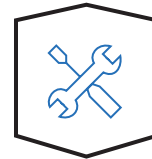
Real Estate  
Leaders



Finance/  
Accounting



Procurement/  
Sourcing



Third Party  
Providers

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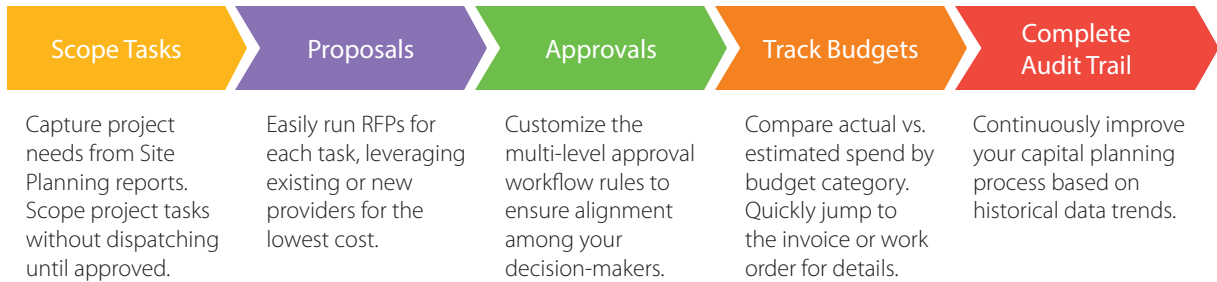
## Benefits

- **Fund the most valuable projects.** Make decisions on spending tradeoffs with full visibility across potential projects, including estimated costs and schedules.
- **Lower the costs of capital projects.** Manage, control, and reduce spend on capital projects with competitive RFPs, while tracking every investment in your assets.
- **Execute projects more efficiently.** Complete more projects each year, while wasting less time on spreadsheets, with a centralized view of assets, costs, budgets, and contractors.
- **Always know whether projects are on track and budget.** Know how you're doing at a glance, with complete visibility and accountability for budgets, execution progress, and providers.
- **Improve results while managing risks.** Optimize your future projects with best practices learned from your historical data and audit trail of past decisions.



## The Project Life Cycle

All critical project information, from RFP bidding to budgets, from approvals to completion, is tracked in a single system, with an audit trail of every decision along the way.



## Features

ServiceChannel Projects helps your Real Estate, Finance, and Procurement teams collaborate on the capital planning process, so you can control costs and manage risks within corporate guidelines.



### Financial Cost Savings

- **Manage project spending.** Reduce spending with lower proposal costs upfront, and track actual contractor cost over time.
- **RFPs for lower costs.** Obtain multiple competitive bids with integrated RFPs. We can recommend low-cost Scout providers to grow your network.
- **Make smart tradeoff decisions.** Identify, scope, cost, and prioritize potential investments, prior to obtaining approval and committing spending with providers.
- **Estimate costs and track budget variance.** Estimate costs for each project, and easily roll up estimated vs. actual spending across budget categories.



### Capital Projects Productivity

- **All projects in one place.** Execute your capital plan more efficiently with a centralized view of projects, costs, budgets, contractors, and assets.
- **Keep it all connected.** Track multiple work orders, providers, assets, categories, trades, and GL codes in a single project.
- **Less sheet to deal with.** Finish more capital improvement projects per year with the same FM team spending less hours working on spreadsheets.
- **Project workflows just flow.** Operate a streamlined process for gathering project ideas, scoping work and budgets, requesting approvals, tracking progress, and reporting results.



### Risk Controls

- **Financial controls.** Enforce accountability for spending decisions with multiple levels of automated approval workflow.
- **Monitor spending.** Always know which projects are on track and which are running over budget.
- **Learn from past data and decisions.** Improve your capex allocations with learnings from your detailed data history and audit trail of past decisions.
- **Categorize unexpected costs.** Manage repairs after accidents, disasters, and pandemics by tracking unbudgeted projects in the same system.



**Projects Module**

Actions Projects Budgets Templates

**669 Projects**  Starred  Projects on Hold  In Progress  Assi

Add Filters 0 Columns 12

ID	Project Name	Status	Scheduled	Priority	Loc. Name	Location ID	Category	Budget	O. Est. Cost
1441	Atlanta CEC Plexiglass Divider Panels - 07970	ApprovalCycle	2020-07-23 2020-07-31	High	Atlanta CEC	07970	Capital Projects	Unbudgeted	16700.00
1440	Furniture Counter - 07202	InProgress	2020-07-24 2020-08-14	High	Sample Road	07202	Capital Projects	Unbudgeted	15000.00
1439	Furniture Counter - 07198	InProgress	2020-07-24 2020-08-14	High	Miami Lakes	07198	Capital Projects	Unbudgeted	15000.00
935	Fence Upgrade - 07248	ScopingInProgress	2020-07-21 2020-08-14	High	Oklahoma City	07248	Capital Projects	Unbudgeted	10000.00
932	Epoxy Floor - 07211	InProgress	2020-10-01 2020-10-31	Medium	Huntsville	07211	Minor Projects	Unbudgeted	15000.00
931	Epoxy Floor - 07284	InProgress	2020-09-01 2020-09-30	Medium	Rivergate	07284	Minor Projects	FY21 Budget	15000.00
928	Sales Cube Reconfiguration - 7179	InProgress	2020-08-09 2020-08-12	High	Metro Park	07179	Capital Projects	Unbudgeted	22000.00

See the status and cost of all projects in one list, to keep everyone on the same page.

Filter based on budget category, project type, budget period, status, location, project manager, and more.

Track all the tasks, costs, and providers for a project in one place.

Select winning proposals for each task, and issue WOs after approvals.

**244-5 Shower Remodel-RM.00998** Nick Wacker FMM 1980

Sched Start Date 2020-07-07 Location Name 2050 Hwy #70E Budget UNBUDGETED Priority Low  
Sched Completion 2020-08-07 Location ID 0244 Category Interior Type CapEx

TASKS LIST COST INFO APPROVAL ROUTING NOTES HISTORY ATTACHMENTS

**Project Tasks (3)**

Task	Type	Trade	Scheduled	Provider	NTE	Status
244-Shower Remodel-Down Payment <a href="#">WO#143603016</a>	WO	GENERAL - INTERNAL	Jul 10, 2020	MIDWEST TILE & REMODELING	18000.00	INVOICED
244-Shower Remodel-Completion Payment <a href="#">WO#143603219</a>	WO	GENERAL - INTERNAL	Aug 05, 2020	MIDWEST TILE & REMODELING	30000.00	OPEN
<input type="checkbox"/> Remove and install fixtures for shower remodel	RFP	PLUMBING	Jul 14, 2020	Select One Proposal		Not yet approved

Item	Cost
Original Estimated Cost	\$125000.00
Approved Cost	\$48000.00
Committed Cost	\$48000.00

**Lighting fixture Replacements at 2345** SC-Dylan O'Neill

Sched Start Date 2020-07-27 Location Name Leum's test Budget CapEx Lighting Retrofits - Q1 Pre-Approved Priority Low  
Sched Completion 2020-08-01 Location ID 4212 Category CapEx Type Interior LED

TASKS LIST COST INFO APPROVAL ROUTING NOTES HISTORY ATTACHMENTS

**Invoices**

Invoice #	Work Order	Provider	Cost	Date	Status
9372097	143827732	GriffCo Inc.	\$7350.00	2020/07/13	OPEN

**FORECASTED COST**

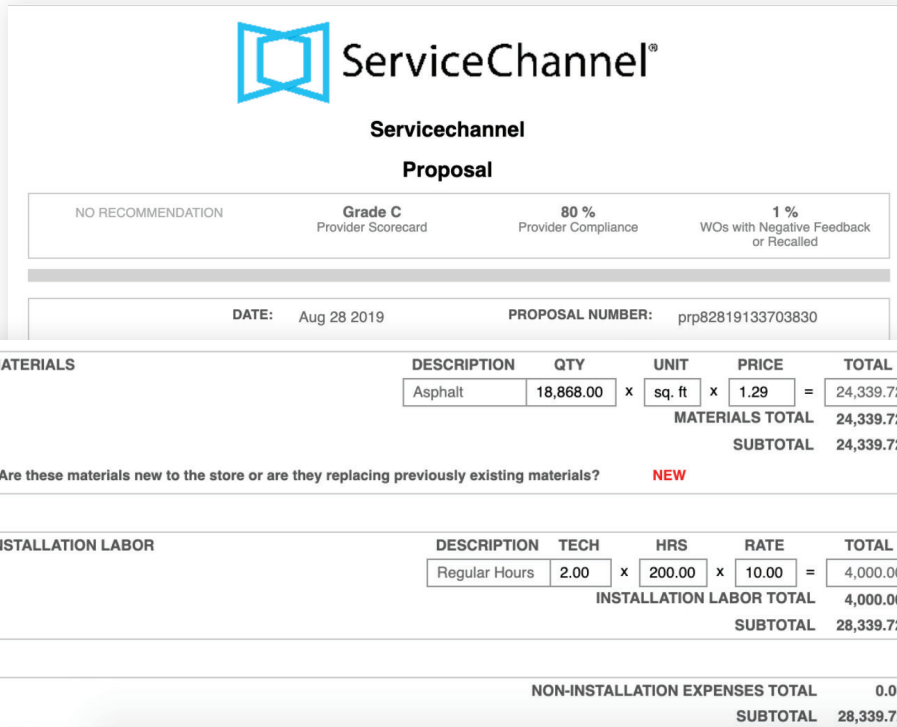
**\$14660.00**

Original Estimated Cost	\$12000.00
Committed Cost	\$14660.00
Forecasted Cost	\$14660.00
Approved Cost	\$14540.00
Remaining Project Spend	\$0.00
Incurring Cost	\$7350.00
Labor	\$6500.00
Materials	\$700.00
Assets	\$0.00
Other	\$150.00
Variance Cost	\$4650.00

Always know how you're doing on budget variance.

Compare the forecasted cost to what's been incurred to date and the original estimate.





**ServiceChannel**  
**Proposal**

NO RECOMMENDATION      **Grade C** Provider Scorecard      **80 %** Provider Compliance      **1 %** WOs with Negative Feedback or Recalled

DATE: Aug 28 2019      PROPOSAL NUMBER: prp82819133703830

MATERIALS	DESCRIPTION	QTY	UNIT	PRICE	TOTAL
	Asphalt	18,868.00	sq. ft	1.29	24,339.72
<b>MATERIALS TOTAL</b>					<b>24,339.72</b>
<b>SUBTOTAL</b>					<b>24,339.72</b>

Are these materials new to the store or are they replacing previously existing materials? **NEW**

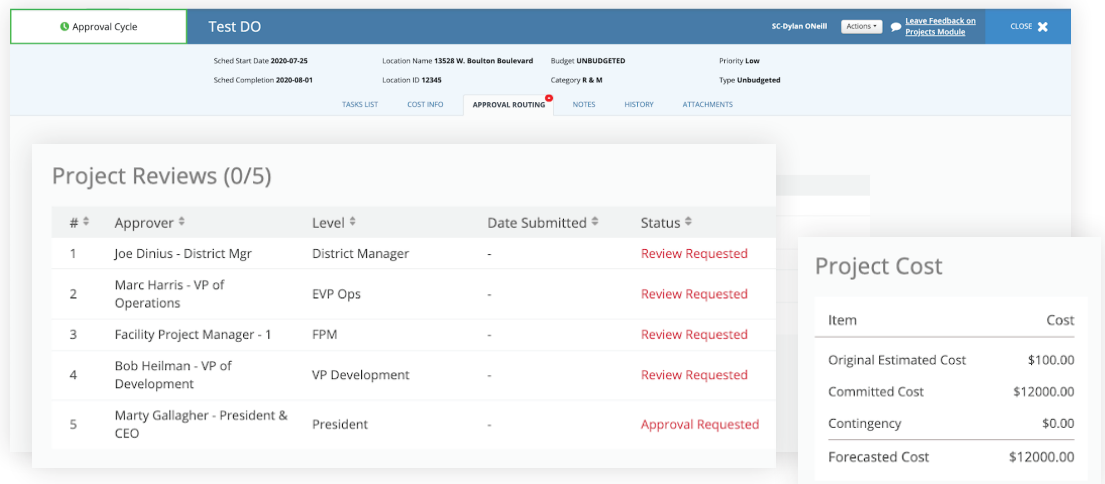
INSTALLATION LABOR	DESCRIPTION	TECH	HRS	RATE	TOTAL
	Regular Hours	2.00	200.00	10.00	4,000.00
<b>INSTALLATION LABOR TOTAL</b>					<b>4,000.00</b>
<b>SUBTOTAL</b>					<b>28,339.72</b>

<b>NON-INSTALLATION EXPENSES TOTAL</b>					<b>0.00</b>
<b>SUBTOTAL</b>					<b>28,339.72</b>

Review proposal cost details before selecting the winning provider for each task.

Compare contractors using ServiceChannel Provider Scorecard metrics for quality and performance.

Automated approval routing, with historical audit trail of cost estimates and decisions for process control.



Approval Cycle      Test DO      SC-Dylan O'Neill      Actions      Leave Feedback on Project Module      CLOSE

Sched Start Date 2020-07-25      Location Name 13528 W. Boulevar Boulevard      Budget UNBUDGETED      Priority Low  
 Sched Completion 2020-08-01      Location ID 12345      Category R & M      Type Unbudgeted

TASKS LIST      COST INFO      **APPROVAL ROUTING**      NOTES      HISTORY      ATTACHMENTS

Project Reviews (0/5)

#	Approver	Level	Date Submitted	Status
1	Joe Dinius - District Mgr	District Manager	-	Review Requested
2	Marc Harris - VP of Operations	EVP Ops	-	Review Requested
3	Facility Project Manager - 1	FPM	-	Review Requested
4	Bob Heilman - VP of Development	VP Development	-	Review Requested
5	Marty Gallagher - President & CEO	President	-	Approval Requested

Project Cost

Item	Cost
Original Estimated Cost	\$100.00
Committed Cost	\$12000.00
Contingency	\$0.00
Forecasted Cost	\$12000.00

## About ServiceChannel

ServiceChannel, the #1 Facilities Management Platform, is used by global multi-location brands to see inside their buildings, assets, and provider networks — and deliver amazing customer experiences at every location. The ServiceChannel platform captures the industry's richest performance data, with billions of data points drawn from 100 million work orders and over 70,000 providers. Industry leaders such as Louis Vuitton, Bloomin' Brands, CVS Health, and Trader Joe's rely on insights from our platform to work with the best providers, optimize spend, and deliver impeccable customer experience. ServiceChannel is a privately held company funded by Accel, based in the San Francisco Bay Area.

