

INTRODUCTION

The DBS PBMC Contract Management System (known simply as DBS) is a comprehensive software solution for managing all aspects of your Kāinga Ora Maintenance contracting business. Using this software will help your business operate more efficiently, achieve high levels of Kāinga Ora KPI performance and on-time and accurate invoicing. It will improve overall revenue and profitability.

What follows is a *brief* overview of the capabilities of the system. Please note that all screenshots in this document show fictitious data.

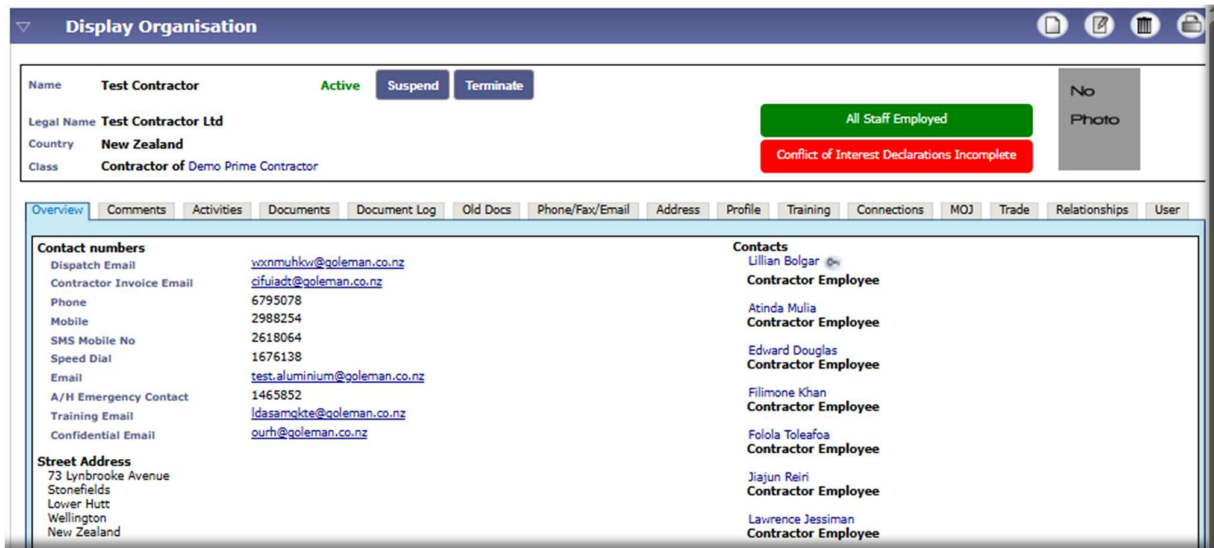
DBS BUSINESS PORTAL – THE FOUNDATION

Overview

The foundation of the system is the DBS Business Portal, a web-based platform for building and operating integrated business systems using rapid application development technologies. This product is targeted at corporate-level businesses needing secure and scalable systems. It is a framework for developers to quickly design, prototype, build and deploy applications that meet very specific customer requirements and expectations, while re-using core components. As the foundation for the Job Tracking System, it provides the Menu and Access Control System, User Administration and Configuration Setup for the system along with cross-application modules such as the CRM Database and Documents Management.

CRM Database

The CRM database is where you manage your workforce. It's a repository of customer and supplier information - the organisations and people in your value chain. For the Job Tracking System these are grouped into Customers, Contractors, Contractor Employees and Internal Employees. It's where we store their names, contact info and details such as their trade registrations, trade speciality and trade area. This helps to dispatch jobs to appropriately skilled workers in the right area.



Once a person has been set up in CRM they can become a user of the system. Users are assigned roles which determine their level of access to the system as well as their function in the work flow, for example: Jobs Supervisor, Jobs Administrator, Quality Assurance, Quality Admin, Area Manager etc.

Document Management

Document management is a cross-application module used for loading and managing documents throughout the system. In CRM it's used to verify contractor and employee documentation (liability insurance, bank

details, GST proof, health and safety, training/qualifications, work eligibility etc.]. In Order processing it is used to load documents and photos relating to work orders, including certificates, measurement forms and calculators, appliance reports, H&S plans and inspections etc etc.) In Quality Assurance it's used to load on-site audit photos, SVR audit photos and proof of corrective work.

CRM Add-ons

Additional CRM modules available include ID Card Printing, MOJ Form tracking, Conflict of Interest Forms, Induction and Onboarding, Document Verification, Document Expiry Reminders and much more. Talk to us for details.

JOB TRACKING SYSTEM

System Setup

Before you can run the Job Tracking system you must establish code schedules, address data, alerts and rates. While most of the data will be loaded into the system from spreadsheet or via APIs, tools are none-the-less required to refine the settings, view what has been set up and react to changes coming from Kāinga Ora through the life of the contract.

Code Schedules

Here are some of the main configurable codes the system allows:

- Contract Numbers
- Priorities and Schedule Types
- Order Statuses
- Work Categories
- Note Types
- Locations
- Job Codes
- Job Types
- Trade Types
- KPI Types
- Exemption Types
- Hazard Types
- Areas, Area / Postcode Mappings
- Dwelling Types
- Roof Types

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Address Master Data

Addresses are loaded into the system from spreadsheet and/or when orders are received via API. They are automatically sorted into Areas using Area / Postcode Mappings.

Property Enquiry allows you to view addresses, search for addresses with alerts and view full details, including Alerts, Comments, Documents and more. Alerts are stored against the address and can be activated/deactivated as necessary. Alerts flow through to Order Details, Job Cards and the Mobile App.

Rate Schedules (SORs)

Both Client SORs and Contractor SORs are loaded in to the system from spreadsheets using a standardised format. Once loaded rates can be maintained manually if changes are needed. Each Contractor is linked to their SORs which determines their rate for the work and allows them to provide a given service in a given area.

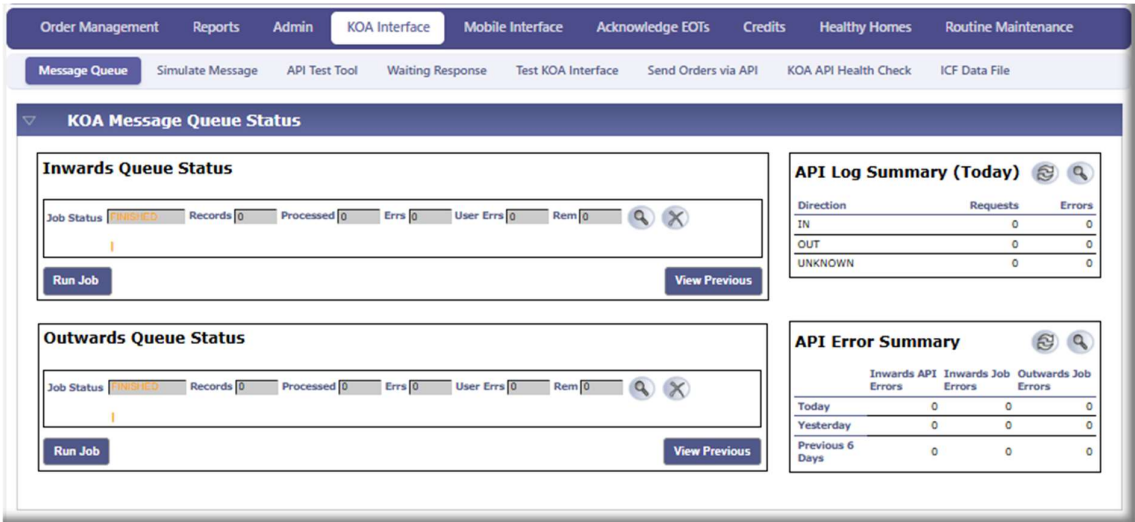
KĀINGA ORA INTEGRATION

The system complies with Kāinga Ora's Contractor Work Order Interface Specification requirements for integration using their restful API. This is more than just a technical integration. The system manages workflows and validates data so as to ensure compliance at every stage, even in the field. It is not just about sending data in the right format, it's about sending the right data at the right time, preventing users from working out of sequence, ensuring variations are sent for approval and ensuring variations are notified instantly to relevant parties when issued or declined by Kāinga Ora.

API Processing

Technically the API is a Json-based bi-directional restful API that matches the Kāinga Ora Interface specification. Incoming work order messages are loaded into a message queue, prioritised so urgent work goes first and then loaded into the system ready for dispatch, or in many cases auto-dispatched. Queue processing is near real-time, during times of peak load the queue may spread the work. The queue may be put on hold during planned outages and can resume when the target system is back on line. Notes and requests for update, exemptions etc. are similarly queued for outbound transmission to Kāinga Ora.

Management tools are provided for system admins to monitor and manage the message queue and to investigate errors.



Additional interfaces are available, including a mix of SMTP, SFTP and manual uploads, as not all Kāinga Ora messaging is done via their API.

Other social housing providers can be supported with the ability to build a custom interface as required. We currently support interfaces with Accessible Properties (IHC) and Tāmaki Housing Authority in addition to Kāinga Ora.

DISPATCH

A manual dispatch screen is available for work to be dispatch to contractors, allowing choice of suitable trade skills in the area. However, most work is auto-dispatched using a matrix of up to five preferred contractors for each area/priority/trade type.

ORDER MANAGEMENT

Internal users access their orders via the View Work Orders screen which allows for searching of orders by numerous criteria. Once an order has been selected its details can be viewed and maintained via the Order Entry screen. In brief this allows:

- Header: Assignment of scoper, supervisor, programmer and administrator. Entry of internal notes and status. Send variations and requests for update
- Details: View, add, modify and exclude job lines
- Dispatch: View and change status of dispatches
- Exemptions: View and request PBMC exemptions
- Contact: View tenant contact details
- Notes: Create and send notes (Internal/Client/Trades/Other)
- Log: View the order log – a log of all major and minor events on the order
- Time Spent: View and enter Time Spent records
- Cards Left: View Cards Left by Trades
- Dates: View order status dates (these are automatically calculated by the system)
- Cover Sheet: View, maintain and dispatch coversheets.
- Documents: View and load documents and attach them to job codes.
- Checks: View Quality Checks and KPI Pass/Fail checks for the order.
- Variations: View, internally approve and send pending variations
- Property: View info relating to the property, its address, alerts, hazards and parent or child unit refs.
- Quality: View QA audits and Cars relating to the order.
- Other Work: View other recent or current work at the address.

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Dates Create Date 29/05/2025 13:39:00 WIP Date 05/06/2025 11:57 Responded 06/06/2025 08:00 Expected Completion 13/06/2025 Expected Start 29/01/2025 In Progress Check EOT Approved Resp 16/05/2025 23:59 Internal Completion 																																																												
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Please repair wall in garage that is damaged. Contact before visit: AM: YYYYYN, PH: YYYYYN AM Please repair wall in garage that is damaged. HAZARDS: (1) Consent for Rottweiler at property, dated 18/8/2045.																																																												
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SCOPES

Scopes are managed through the same user interface as WIP orders, just they are at quote status. Scopes can be dispatched to the various Trades for scoping of their work, and/or scoped estimated by the prime contractor's own scope supervisors. Once the Scope is complete the quote can be sent for approval. External Paint Scopes (EPS) are done on the mobile app, using an online form which walks the scoper through the property, assists with measurement capture and guides them to the correct job codes according to the cladding material etc.

The app provides other forms for scopers, e.g. Heating Calculators, M323 (Tenant Agreement), Inspection Reports and H&S Plans.

CONTRACTORS

Contractors access the system via the Contractors Portal. Their menu gives them access to:

Info

- Welcome: Contractor Notices and forthcoming events
- Rates Update: Latest rate changes
- Codebook: Job Codes and Rates
- Mobile App; Download area for the Android app

View Jobs

Their main window into the work assigned to them, View Jobs allows them to search for current and previous jobs, add job lines, start, pause and complete the job, request pre-approval, re-assign work to/from their employees, log tenant contact, send 30-minute notification texts, view and enter notes, load documents and photos, view other workers on site.

Payment Enquiry: Enquire on Payments made

Completed Jobs: Report Job Completion by Employee

Downloads: Jobs, Invoices, Timesheets

Company and Staff Details: Self-service Updates of Company and Staff info

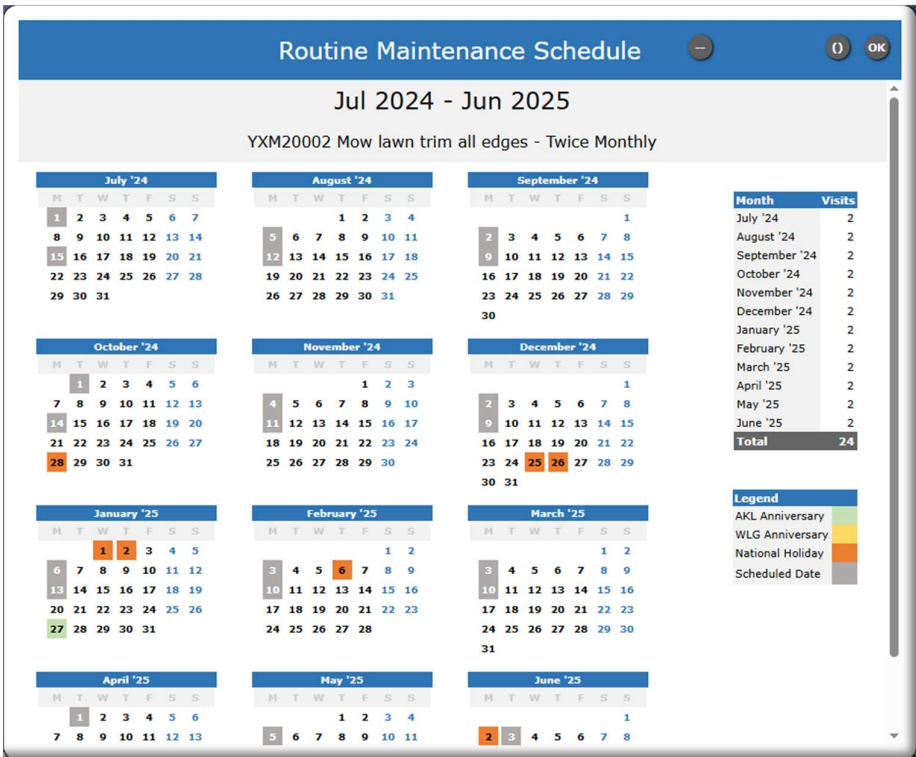
Dashboard: Quality Performance and KPIs

Induction Requests: Initiate Induction for new employees

Conflict of Interest: Annual COI Declarations for their Employees
Routine Maintenance: View RM Agreements, Quote for new RM Agreements.

ROUTINE MAINTENANCE

Routine Maintenance is an optional add-on sub-system which allows the creation, quoting and scheduling of routine maintenance agreements for grounds maintenance and communal area cleaning. Agreements are sent to Kāinga Ora for approval and Kāinga Ora staff can approve the agreements online. Maintenance can be scheduled on daily, weekly, fortnightly, bi-monthly, monthly, 3 monthly or sic monthly intervals. The system automates renewals.



QUALITY ASSURANCE

Quality Audits – Internal

Internal auditors can conduct WIP and Invoiced Work Audits. Each line can be flagged as Damage Identified, Qty Code Identified, Has Quality Issues with Procurement, Work Not Done, Workmanship or KOA Specified, Over-Scoped or Observation Required. The auditor can do this on the App and can load photos of the work to support their findings. Findings are communicated Letters can be sent and Corrective Action Requests created for the contractor to action as required. A disputes process allows the contractor to agree/disagree and for the head contractor to respond in a workflow cycle until the issue is resolved. For over-undercharged work, invoices or credits notes are generated by the system.

Quality Audits – External

As Kāinga Ora now do a lot of their own auditing, the system allows their Site Visit Records (SVRs) to be loaded into the system, including their visit photos resulting in CARs being raised and sent to eh contractor for remedy.

Customer Complaints

Customer Complaint emails (MFFs) are automatically loaded into the system via an SMTP interface. As the response progresses, notes are loaded into the system and the work can be sent for audit or corrective action.

Corrective Action Requests (CARs)

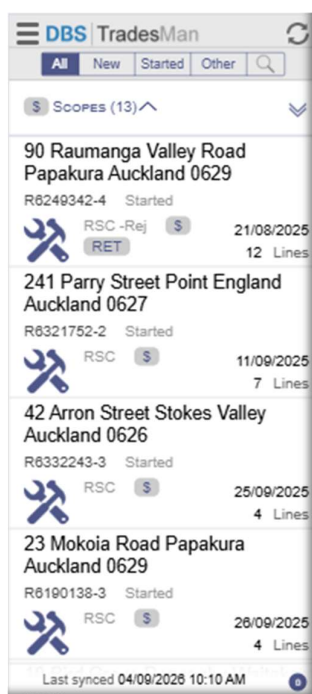
Corrective Action Requests are notified to the Contractor and appear in their portal or on their App as a CAR job type. They can load the affected lines and make their own comments, agreeing or disagreeing with the CAR as part of a workflow that will eventually result in resolution one way or the other.

Credit/IVC

When a CAR results in a Credit or an Invoice a credit or invoice request is generated for sending to the client. The system allows these requests to be tracked until the credit or invoice is issued.

TRADESMAN APP

The Tradesman App is a field app used throughout the maintenance work process.



Scopers use it to enter quotes

Trades use it for responsive maintenance and planned work.

Supervisors use it to inspect and sign off work on site.

Quality Assurance use it audit work on site. Photos can be uploaded showing the work before and after and during audits.

The app allows tenant appointments to be made on the go, left cards to be logged and photographed as evidence of attendance.

Variations can be entered and sent for approval.

Numerous forms are provided, such as Heating Calculators, M323, Appliance Reports and Measurement Sheets.

ACCOUNTS FUNCTIONS

Remittances and BCTIs

Remittances Advices are loaded into the system via an automated interface and Buyer Created Tax Invoices are generated for the subcontractors. Subcontractors are provided with reports and downloads where they can see their payment history

Accounts Interface

Accounts interfaces are built to customer requirements, the simplest variation is an excel download for loading into their accounting system, more complex scenarios include restful interfacing via APIs.

Accounts Functions

Although not a full accounting system, DBS does support a number of account-related functions, including Manual Payments, Create Remittance, Remittance Enquiry, Remittance Reconciliation and Contractor Reports such as Completed v Paid, Invoiced V Paid, Invoiced Jobs Report and WIP Enquiry.

Accounts Reports

A variety of accounting and management reports are available, including Debtors Summary, Sales Report, Sales by Priority, Incoming Outstanding, Planned Budget and BCTI Enquiry.

Management Reports

A management dashboard is available., giving an overview of Jobs Invoiced and Created Weekly or Monthly. Management Reports Include Sales Report, Performance Report, Planned Work Forecast, Planned Work Budget.

HR FUNCTIONS

The following HR functions are optional add-ons.

Contractor Onboarding and Inductions

New contractors and new employees are onboarded with a standardised process which ultimately sets them up for work in the Job Tracking system. This eliminates paperwork and spreadsheet-based controls.

ID Cards

ID cards are printed directly out of the system from the data already held about each team member.

Conflict Of Interest

The annual conflict of interest declaration process is fully automated, with COI forms sent out electronically to be completed by all staff and contractors

Document Verification and Document Expiry

Documents such as Trade Certification which require verification are uploaded through the system and expiry reminders sent out when they become due.