Head Contract (Client)

What this feature does

The Head Contract (Client) area is where you manage the contract between you (the builder) and your client. It is the top of your contractual chain on a project: the agreement that sets the contract sum, the claim cycle, retention rules, key dates, and how the contract is administered. Everything you claim from the client flows through here.

In Deep Space this lives under the **Commercial** module, and it sits deliberately between the **Budget Register** and the **Subcontractors** area. That order reflects how money moves on a job. The head contract is the money coming in from your client. Subcontracts are the money going out to your trades. The gap between them is your margin.

A head contract record holds five connected things: the contract details and rules, a **Schedule of Values (SOV)** that breaks the contract sum into claimable line items, client-side **variations** that move the contract value, **progress claims** you raise against the SOV, and the **payment schedules** your client returns. Once the contract is set up, claims, variations and payment schedules all hang off it automatically.

When to use it

Reach for Head Contract (Client) when you need to:

- Set up a new client contract on a project (contract type, region, retention, claim cycle).
- Build or review the Schedule of Values that you will claim against.
- Raise a progress claim to your client for the period.
- Record a client-side variation and adjust the contract value.
- Check your live commercial position: total contract value, claimed to date, and retention held.

Before you start

- You need access to the **Commercial** module for the workspace, and the right project selected in the project switcher at the top of the screen.
- Your project's cost structure (budget categories and cost codes) should be set up first, because SOV lines map to cost codes.

  `needs verification: exact permission/role required to create or edit a head contract`

- If your SOV is going to come from the estimate, the estimate should be finalised so it can be imported and locked.

Step-by-step guide

1. Open the Head Contract Register

From the left menu, go to **Commercial → Head Contract (Client) → Head Contract Register**.

> [Screenshot: Commercial menu expanded showing Head Contract (Client) with its sub-items: Head Contract Register, Variations (Client-Side), Progress Claims (to client), Payment Schedules (Received), Invoices (to Client).]

The Register lists every client contract on the project. The cards across the top give you the live position at a glance:

- **Total Contracts** (how many, and how many active)
- **Contract Value** (the revised contract value, including approved variations)
- **Claimed to Date** (total claimed, and what percentage of the contract that is)
- **Retention Held** (across all contracts)

Each row shows the contract, client, region, contract type, SOV status, and original value. An SOV badge such as **"2 unmapped"** is a prompt that some SOV lines are not yet mapped to a cost code.

> [Screenshot: Head Contract Register showing the four KPI cards and one contract row (CON-357 Collins Street-0001, client KFC, region SA, Lump Sum, SOV "2 unmapped", status Active), with the New Contract button top right and SOV / view / edit actions on the row.]

To start a new contract, use **+ New Contract** at the top right. To open an existing one, click the contract name.

2. Review the contract details

Opening a contract slides out a detail panel with tabs: **Details, Documents, Attachments, Variations, Claims**.

The **Details** tab is split into clear blocks:

- **Contract Snapshot** — contract type (for example, Lump Sum), the **Region & SoP Regime** (for example, SA, which applies the correct Security of Payment Act rules for that state), the contract profile, and the **SOV Status** and **SOV Source**. A source of **"Estimation Import (Locked)"** means the schedule came straight from your estimate and is locked from editing.
- **Contract Details** — project, client, status, the **claim cycle** (for example, monthly on the 25th with 30 day payment terms), key dates (contract date, practical completion, DLP), and duration.

- **Notices & Contract Administration** — notice periods for NoD and EoT, liquidated damages rate, and delay damages cap.

> [Screenshot: Contract detail panel on the Details tab, showing Contract Snapshot (Lump Sum, SA, SOV Status, SOV Source "Estimation Import (Locked)") and Contract Details (client KFC, claim cycle monthly day 25, key dates).]

3. Set up or review the Schedule of Values (SOV)

Scroll down the contract record to see the **Schedule of Values**: the contract sum broken into individual claimable lines. Each line has a description, its value, the **cost code** it maps to, and a progress bar showing how much has been claimed against it so far.

> [Screenshot: SOV line items inside the contract record, each row showing description, value, a cost code (CC-XX-XX), and a claim progress bar.]

The SOV is the bridge between the head contract and your budget. Because each line maps to a cost code, your claims and your budget stay reconciled. SOV is set up **per head contract**.

To build or change the SOV, use the **SOV** action on the Register row (or the SOV setup from within the contract). The setup runs as a short wizard:

1. **Step 1: Source** — choose where the SOV comes from (for example, import from the estimate, or use the client's own breakdown).
2. **Step 2: Build SOV** — add, group and map the lines to cost codes.

The wizard is state-aware, so if you have already started, it resumes where you left off rather than starting over.

4. Manage client-side variations

Open the **Variations** tab on the contract (or **Commercial → Head Contract (Client) → Variations (Client-Side)**). These are the variation orders between you and your client. Each one has a variation ID (for example, HVO-001-0001), a description, a type (such as Client Request or Design Change), a status, and a sell amount.

> [Screenshot: Variations tab showing KPI cards (Total Variations, Total Value, Approved, Submitted) and two rows, HVO-001-0002 (Design Change, Submitted) and HVO-001-0001 (Client Request, Approved).]

Approved variations lift the **revised contract value** shown on the Register, so the contract total always reflects the latest agreed scope.

5. Raise and track progress claims

Open the **Claims** tab on the contract (or **Commercial → Head Contract (Client) → Progress Claims (to client)**). Progress claims (for example, PC-357 Collins Street-0001) are what you submit to your client for the period. Each shows the claim date, the period ending, status, claimed amount, and type.

> [Screenshot: Claims tab showing KPI cards (Total Claims, Total Claimed, Certified Amount, Submitted) and two certified progress claim rows.]

A claim is raised against the SOV, so you are claiming a percentage of each line. Certified claims roll up into the **Claimed to Date** figure on the Register. Your client's certified response is captured under **Payment Schedules (Received)**, and the billing is closed out under **Invoices (to Client)**.

Tips

- Read the menu top to bottom as the money story: Budget Register, then Head Contract (client side, money in), then Subcontractors (money out). It keeps the commercial picture straight in your head.
- Clear the SOV **"unmapped"** flag early. Until every line maps to a cost code, your claims will not reconcile cleanly against the budget.
- Set the **Region & SoP Regime** correctly when you create the contract. It drives the Security of Payment rules and the notice periods that apply.
- Importing the SOV from the estimate (and locking it) saves re-keying and keeps the contract tied to the priced scope.
- Check the Register KPI cards before each claim run for a quick read on contract value, claimed to date, and retention held.

Troubleshooting

Symptom: The SOV badge says "X unmapped" and claims do not line up with the budget.
Cause: Some SOV lines are not yet mapped to a cost code.
Fix: Open the SOV setup and map every line to its cost code. The badge clears once all lines are mapped.

Symptom: Reopening the SOV setup drops you back to Step 1 even though you had already built lines.
Cause: This was a known state issue where setup restarted instead of resuming. SOV setup is intended to be state-aware and resume at the right step.
`needs verification: confirm current build resumes correctly`
Fix: Your saved lines are not lost. Move forward through the wizard to Step 2 (Build SOV) to continue.

Symptom: You cannot edit the SOV lines.
Cause: The SOV source is "Estimation Import (Locked)", so it is locked to the imported estimate.
Fix: Manage value changes through variations, or use the SOV setup if a re-source is genuinely required. `needs verification: exact unlock/re-source path`

Symptom: The contract value on the Register does not match the latest agreed scope.
Cause: A variation may still be in Submitted rather than Approved.
Fix: Check the Variations tab. Only approved variations adjust the revised contract value.

Related features

- **Budget Register** (Commercial) — the cost structure the SOV maps to.
- **Subcontractors** (Commercial) — the money-out side that mirrors the head contract.
- **Payment Schedules (Received)** — your client's certified response to a claim.
- **Invoices (to Client)** — closing out the billing once a claim is certified.
- **Retentions + Security** (Commercial) — where retention held against the contract is managed.

Source notes

- **From live screenshots (Deep Space Horizon, DS Construction Group workspace, 357 Collins Street project):** the Commercial menu structure, the Head Contract Register (KPI cards, contract row, "unmapped" badge, New Contract button), the contract Details panel (Contract Snapshot, Contract Details, Notices & Contract Administration), the SOV line items with cost codes and progress bars, the Variations tab, and the Claims tab. All UI labels and step order are taken from these screens.
- **From Slack (`#ds-dev-horizon` , `#ds-horizon-qa-testing` , onboarding/DM threads):** supporting context only. The SOV setup wizard steps (Step 1 Source, Step 2 Build SOV), the "Use Client's Breakdown" source method, SOV being set up per head contract, the intended state-aware resume behaviour, and that claims should display the full SOV. Not used to assert UI appearance.
- **Needs verification:** the exact permission/role to create or edit a head contract; whether the current build resumes SOV setup correctly; the exact unlock/re-source path for a locked SOV.