

# ArchiOffice/EngineerOffice Custom Templates Installation

# INTRODUCTION

If ArchiOffice/EngineerOffice standard report and invoice templates do not meet your needs, you have the option of installing custom templates. The following information walks you through the steps of installing ArchiOffice/EngineerOffice 2017 custom templates.

You can have standard and custom templates for two items in ArchiOffice/EngineerOffice:

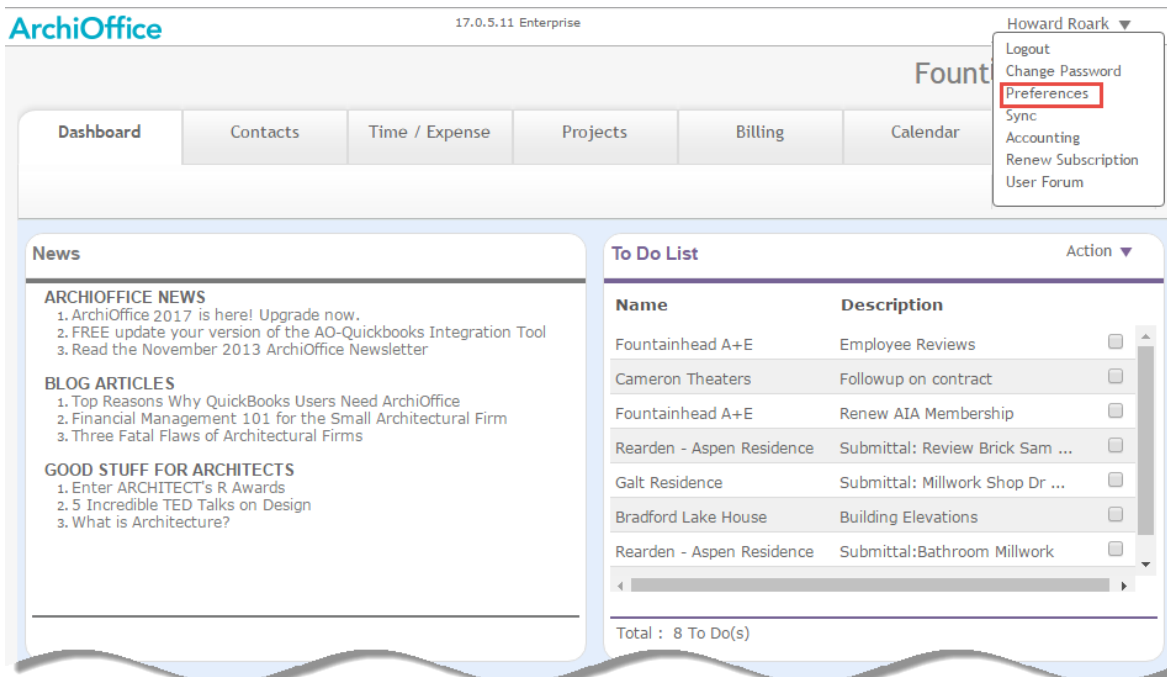
- [Invoices](#)
- [Reports](#)

## Custom Invoice Templates

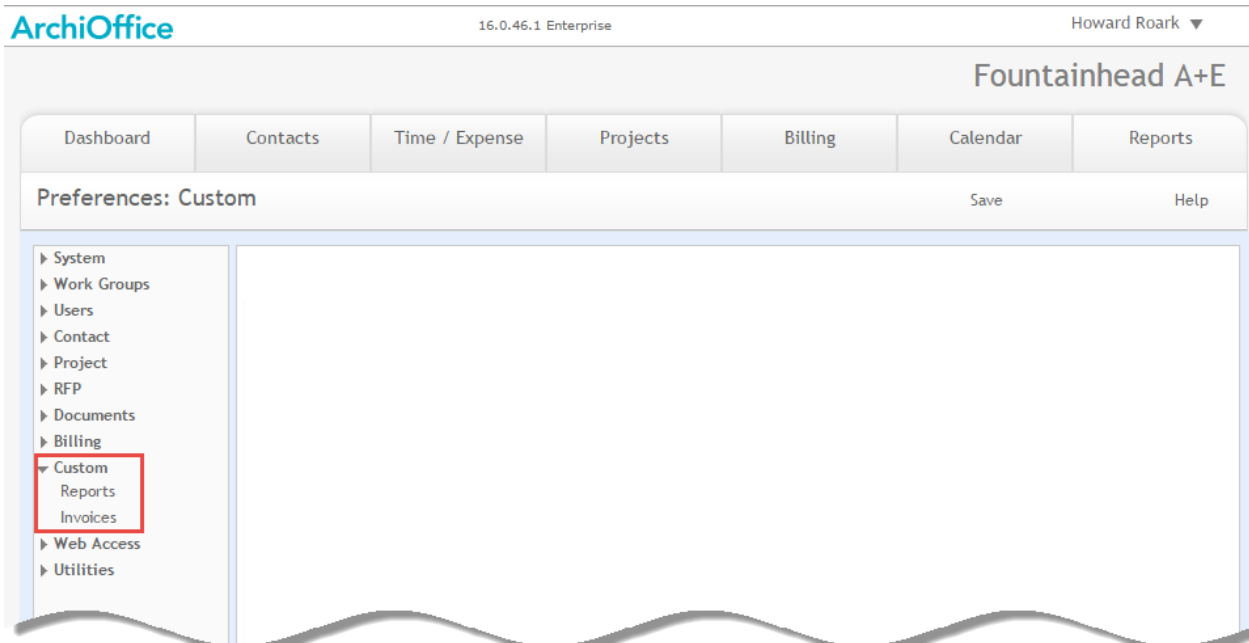
ArchiOffice/EngineerOffice comes with two standard invoice templates that you can choose when generating an invoice: Type A and Type B. If neither of these templates meets your needs, you can have a custom invoice template created by the [BOE Custom Reports](#) department. You will receive the custom invoice file (\*.rpc) on your registered email ID. Please locate this file (\*.rpc) before starting the process of adding it to ArchiOffice/EngineerOffice.


To add a custom invoice to ArchiOffice/EngineerOffice, follow the steps given below:

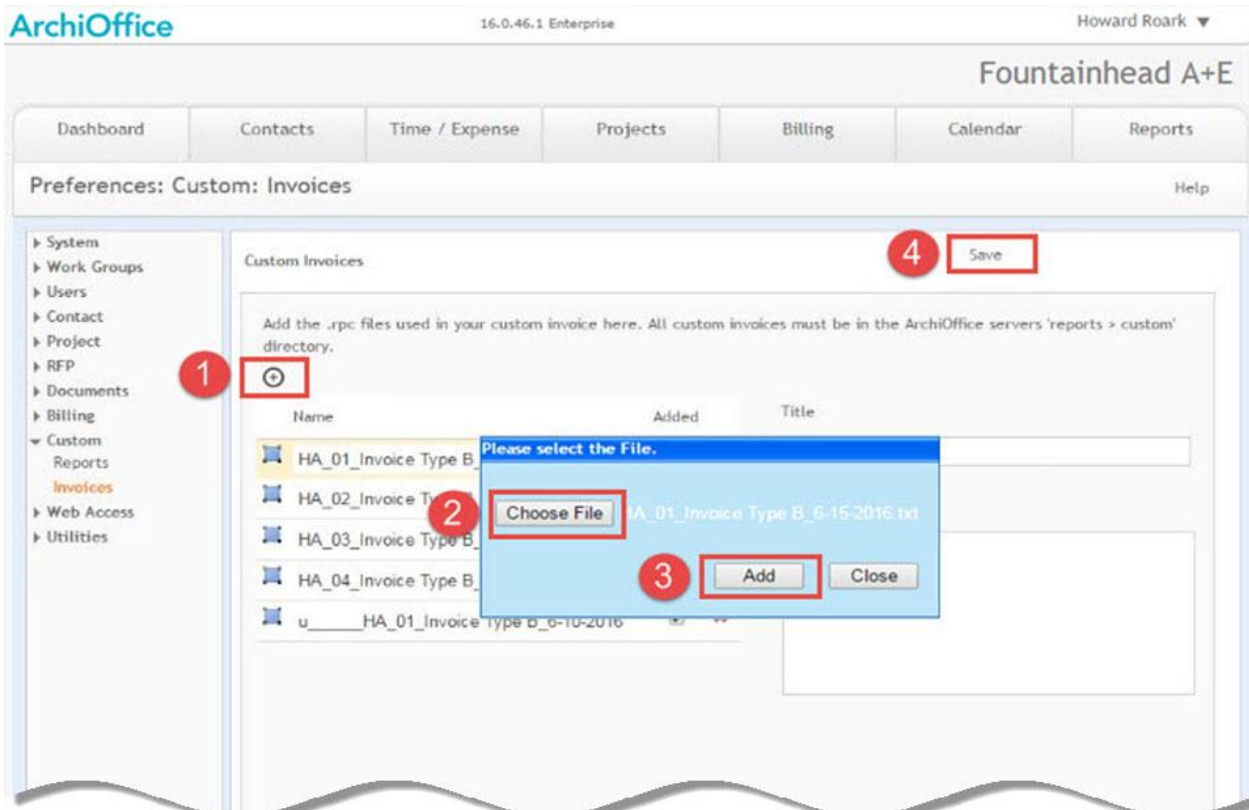
1. Select Preferences from the master drop-down list on the top-right of the ArchiOffice/EngineerOffice screen, under the user name.




2. Select Custom > Invoices on the left.



3. Click  to select the invoice file (\*.rpc) that was sent to you via email. Click Add to continue.



4. After adding the invoice file, click  for that invoice and edit its name, if needed.
5. Mark the Added check box to make the invoice available for use as a template when generating invoices.
6. Click Save.

## Custom Report Templates

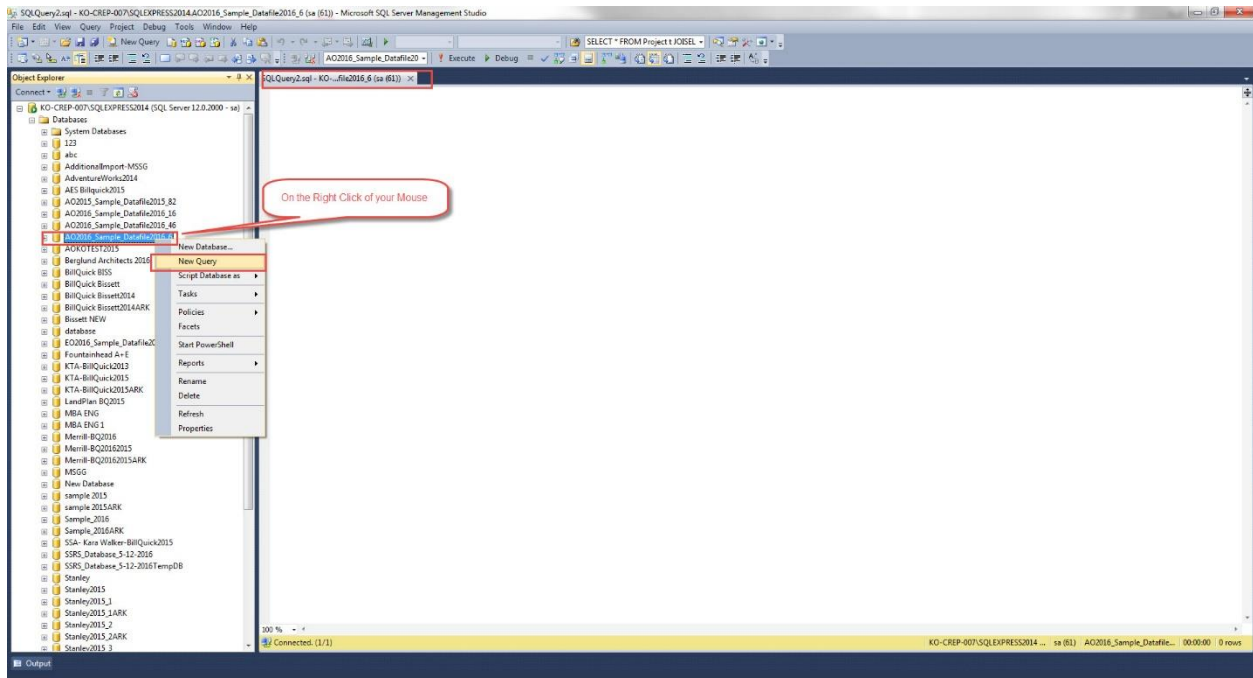
When the [BOE Custom Reports](#) department creates a report for you, you will receive the file (\*.rpt) along with an SQL program on your registered email ID. Locate these files before beginning the process of adding a custom report to ArchiOffice/EngineerOffice. The SQL program is of the type:

- [Stored Procedure/SQL View](#)

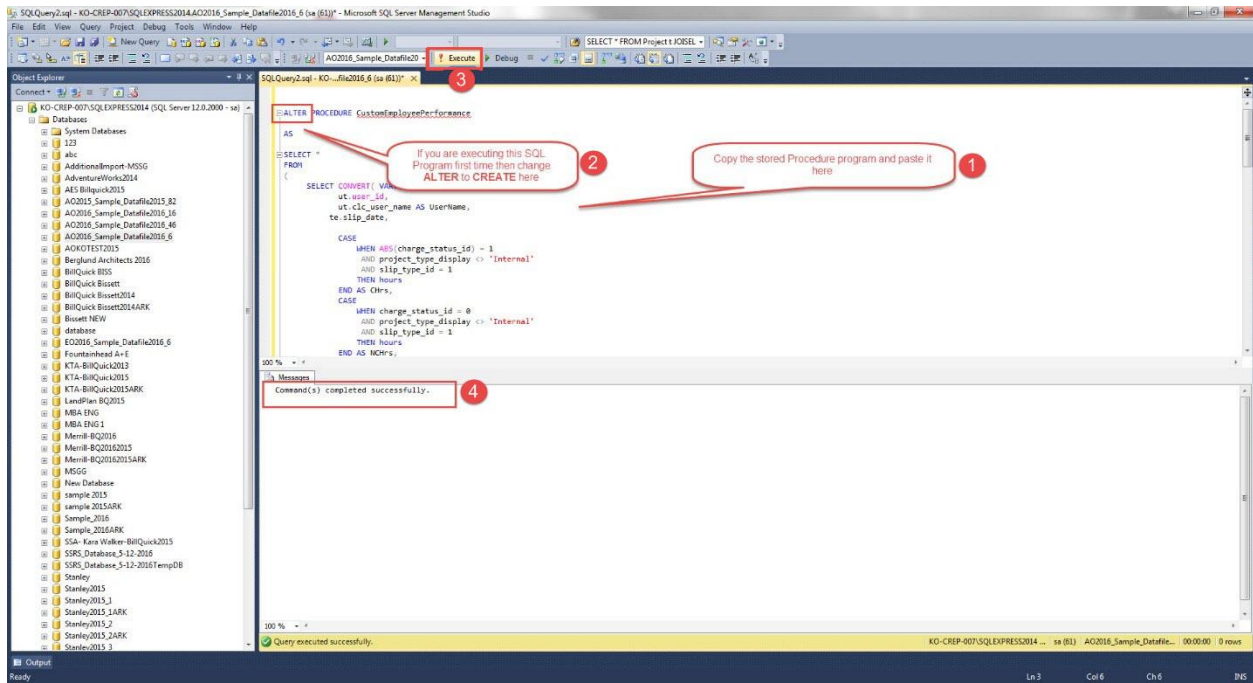
### Installing SQL Stored Procedure

Follow the steps below to install SQL Stored Procedure:

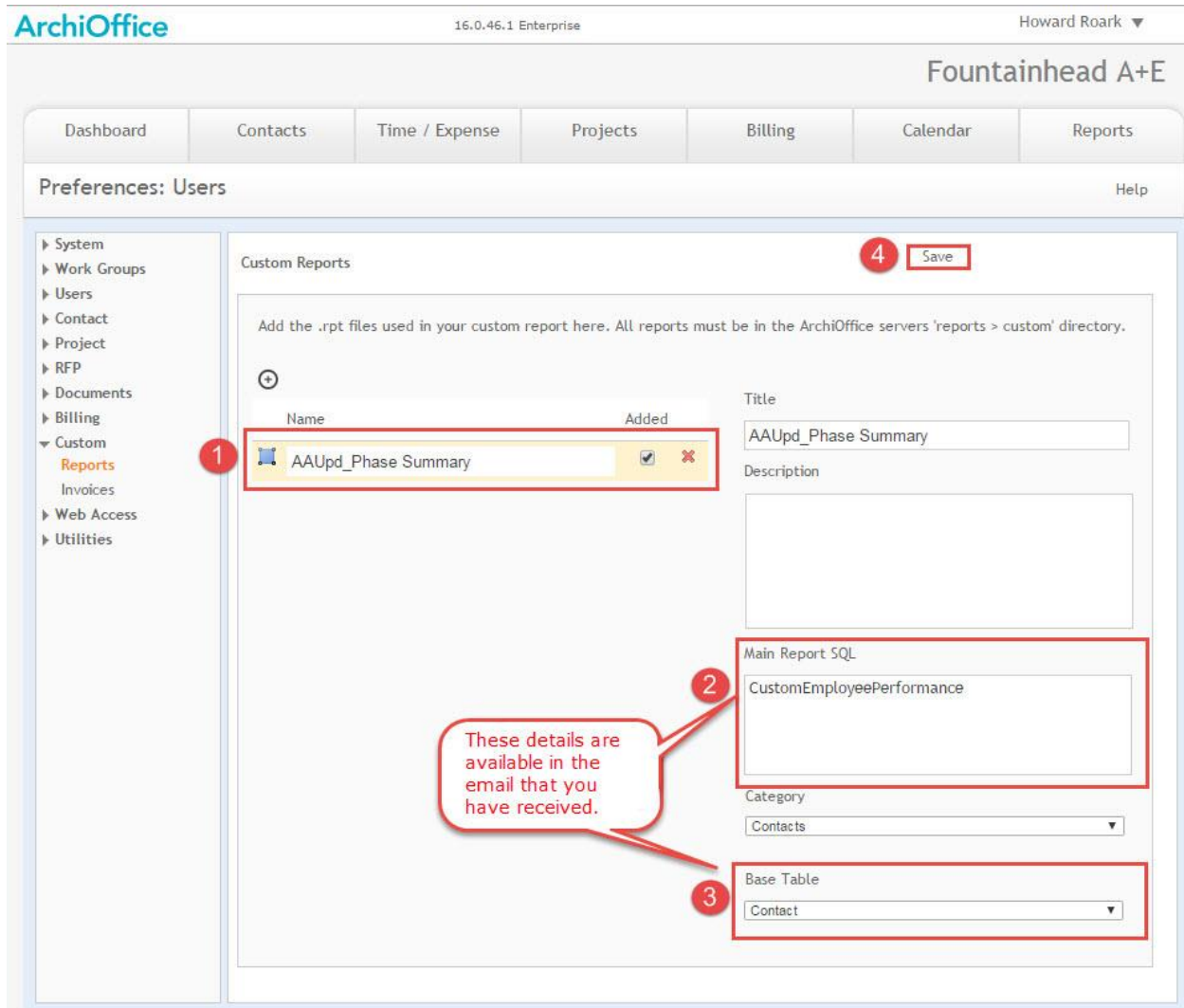
1. Log in to your SQL Server Management Studio.
2. Select your database and right click on it to select New Query option.



3. Open the Stored Procedure program and execute it on your database.



- Copy the Stored Procedure name and paste it in the Main Report SQL field of your ArchiOffice/EngineerOffice Preferences > Custom > Reports screen. Also, select the Base Table from the drop-down list. You will find this information in the email that you received.



5. Click Save.



Please feel free to contact the [BOE Custom Reports](#) department for details on having a custom report or invoice created.



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