ArchiOffice Help Manual 2017

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WELCOME TO ARCHIOFFICE

ArchiOffice is a project management solution for architects. It is networkable, multi-user, device-agnostic software. It was created by architects, for architects, and has continued to evolve to meet the needs of a growing worldwide customer-base. ArchiOffice takes all the disparate pieces of information in your office and organizes them in a most remarkable way by offering solutions such as contact management, document management, task and project management, time and expense tracking, billing and reporting.

Your employees can run ArchiOffice (as client) from anywhere using a PC, Mac, Linux, iOS or Android platform as it is device-agnostic. You can make ArchiOffice instantly accessible to local and remote users via the Internet while retaining all the features and functionality that your business depends on. This solution is simple, affordable, secure, scalable and fast. ArchiOffice 2017 comes in three different editions. Please see the ArchiOffice Edition Comparison Chart for details.

Using advanced technologies, ArchiOffice provides integration with Microsoft Word and Excel as well as accounting systems like QuickBooks. It also syncs with Microsoft Outlook and Entourage, Apple Calendar (iCal), Apple Contacts (Address Book) and Apple Mail.

ArchiOffice uses named licensing which requires each ArchiOffice user to have an ArchiOffice license. We also provide several Support and Maintenance Agreement options.

The ArchiOffice software includes the following main modules:

- Project Management
- Contact Management
- Document Management
- Task Management
- Time and Expenses Tracking
- Billing
- Payments
- Reporting
- Accounting Application Integration
- Microsoft Outlook Integration
- Microsoft Entourage Integration
- Apple Calendar/Mail/Contacts Integration
- Microsoft Word and Excel Integration

INTRODUCTION

KEY FEATURES

ArchiOffice is a ground-breaking software that manages all the workflow needs facing the professional architectural services firm: contact and project management, time and expense tracking, billing, calendar management, reporting, and document management. And it does this all in an intuitive and user-friendly interface.

Key ArchiOffice Features

- Web-application accessible anywhere, anytime
- Business dashboards and charts
- Easy time and expense tracking
- Project management and profitability monitoring
- Powerful task management capabilities
- Efficient and accurate billing and invoicing
- Contacts, events and calendar
- Custom reports and invoice templates
- Document management with document templates
- Project templates for faster project creation
- Project teams
- Integration with Microsoft Outlook
- Integration with Entourage, Apple Calendar/iCal, Apple Mail, Apple Contacts/Address Book
- Submittal, drawing and RFI tracking
- Internal, RFP and billable project types
- Powerful data mining capabilities
- Easy navigation and keyboard shortcuts
- Security control

NEW FEATURES

ArchiOffice 2017 includes almost 50 new features. Below are our top 15.

1. **Attach Expense Receipts with Invoices:** We know users like to attach files to expense entries. Sometimes these are photos of receipts they have in hand while using the ArchiOffice Mobile app during travel. Other times, they want to attach scanned images of consultant invoices. Whatever the need, you now have the option to attach a copy of the image when creating an invoice. File types include GIF, JPEG or PNG.
2. **Create Time Entries from Calendar Events or To-Do Items:** From the Calendar module, you can always take an event or a To-Do item and turn it into a time entry. Previously, all you had to designate was the Phase and Job Code. Now in ArchiOffice 2017, you can also add a description to the record. If the project

uses tasks for time entry, you can even associate one of the pending tasks to the time record.

3. **Track Probability for RFP Projects:** Many firms create RFP (Request for Proposal) projects and need a way to monitor the probability of winning those projects for their revenue and staff planning. In ArchiOffice 2017, we have added the Probability Percentage field to the projects that are set as RFP. Using custom reports, you can also exploit this feature by projecting future revenue based on the value and probability of RFP projects.
4. **Enhanced Color Cues for Client Payment Status:** In the Contact List screen, there are colored boxes to the left of the client names that indicate the status of their receivables. This year we have modified the colors: **red** means the client has a past due invoice; **yellow** means the client owes you money but the invoices are not past due; **green** means the client has paid in full or does not owe you any money. We also made these boxes more intelligent. If you hover your cursor over them, ArchiOffice displays text showing you the amount of money the client owes your firm. Furthermore, you can see this color status in the Billing check box when you open the detail of any client.
5. **Link Scanned Checks to Transactions:** In ArchiOffice 2017, you can now attach files to a payment transaction. If you like to scan your client's checks before depositing them, this new feature allows you to store the scanned images with the actual transactions.
6. **Enhanced Search Options for Time and Expense Records:** We have added more fields to the Search screen, allowing you to find the information you need faster. For example, you can now search for records based on the total value of the time or expense entry. You can also search based on the bill or cost rates.
7. **Link Web Pages to Projects:** Many firms create web pages for their projects or want to link a project to a client's website. In ArchiOffice 2017, you can add a website URL for a project in the Projects > Details screen.
8. **Show Retainer Payments on Invoices without Showing Project Balance:** You now have the ability to display any retainer payments made while also showing your clients the current invoice balance. Previously, if you wanted to display retainer payments, the invoice would automatically display the Project Balance. This new feature gives you greater flexibility as to what information you want to show or hide on your invoices.
9. **Smart and Intuitive Cost Rate System:** One of the fundamental benefits of using ArchiOffice is its ability to track your employee costs separately from the billable value of their time and show you the profitability. However, this required your firm to calculate the cost for each employee outside of ArchiOffice and then enter that value in Preferences > Users > Time and Expense. If an employee was given a raise, you had to recalculate their cost rate. In ArchiOffice 2017, you can enter your staff's salary rate (say, $20/hr), Cost Rate Multiplier (say, 2.85), and then ArchiOffice calculates their Effective Cost Rate. Whenever you modify their salary, their Effective Cost Rate gets updated automatically. This also explains what your multiplier is and if you need to, you can easily vary it per employee. If you do not want to use the standard Cost Multiplier method, you can continue to enter your own Effective Cost Rate manually for each employee.
10. **Warning Notification when Changing Project Status:** If you decide to change the status of an active project, ArchiOffice 2017 warns you if there are any existing time or expense records that have not been invoiced. This means firms are notified about un-billed records and do not risk losing that potential revenue before closing a project.
11. **Easily Update Active Projects with Default Job Codes:** If your firm updates the Preferences > Projects with new Job Codes, you can now easily add the new

codes to all active projects. This way you do not have to manually add them to each project one-by-one.

12. **Smarter Dashboard Widgets:** We have enhanced some dashboard widgets so they include totals when appropriate. For example, the Invoicing Chart displays the total invoiced values for the specified date range. The Payments widget includes totals for payments, retainers as well as a grand total.
13. **Earned Value Chart and Report:** One of the greatest indicators of success of your projects is knowing its Earned Value. In ArchiOffice 2017, we have made it easy for you to understand the earned value of your projects. The Dashboard and Projects module both have an Earned Value chart. We have also included a new Earned Value report, which not only shows you the earned value for each project and phase, but also tells you the value of the un-billed revenue.
14. **Earned Value Analysis:** We are enhancing the Project Tasks screen to allow you to see, side-by-side, the percentage progress of your tasks compared to the percentage of the fee or budget that has been invoiced. This way, you can quickly understand if your invoiced values are lagging behind your earned value or not.
15. **Relative Date Ranges for Billing Analysis:** We have enhanced the Billing module filters to allow you to set date ranges by relative dates rather than manually selecting the start and end dates. For example, you can now set the screen to display records for this month, this quarter, this year or past 12 months.

You can also check out the What's New in ArchiOffice page on our website.

ARCHIOFFICE EDITIONS

ArchiOffice is a highly scalable program. It comes in three editions: Basic, Professional and Enterprise. You can choose the version that is most appropriate for your project management needs, firm size and budget. See the ArchiOffice Edition Comparison Chart for details.

Online Help

How Do I

HOW DO I ACCESS HELP?

BQE Software provides various resources for user guidance and help.

Excellent service and support for ArchiOffice is available. Various user manuals, tutorials and training courses are offered by BQE to help you to explore the rich and robust features of ArchiOffice. Certified trainers are also available to train you on ArchiOffice at different trainee-levels. Visit our ArchiOffice website for more.

For assistance with usage of our products or further information, you can access any of the following:

- **In-product Help**: Click the Help button on any screen to view context-sensitive help.
- **Help on the Web**: Search through our Knowledge Base articles, read our e-letters or user guides available online.
- **Technical Support**: Contact our Technical Support to get answers to questions not found on the web.

- **Training Courses**: Take course from certified ArchiOffice trainers. The ArchiOffice Trainings are available at different trainee levels.

In-product Help

ArchiOffice comes with built in product help. To access the context-sensitive help, click Help on any screen or tab. The help displays the Contents, Index and Search options.

Feedback on ArchiOffice Help

We are always trying to improve the content and usability of the in-product help. If you find errors or have suggestions about how we can improve the in-product help, please let us know. You can send in your feedback to support@bqe.com.

HOW DO I FIND INFORMATION?

Help provides detailed procedures, reference information, tips, and links to resources that provide answers to your questions. For assistance while you work, click the Help button on any screen.

Contents organize topics into books ( ) and pages ( ), allowing you to approach the major features individually. This allows you to understand which features are related to other features. The Index provides a predefined list of keywords. Choose a keyword and click *Display* to jump to the topic for that feature. Use the Search option to find Help topics by your own keywords.

To find information in the help file, click Contents on the Help menu.

In the Help window, do the following:

Click	To
Contents	View the table of contents for the Help. Click each book to display pages that link to topics, and click each page to display the corresponding topic in the right pane.
Index	Search for specific words or phrases or select from a list of index keywords. Click the keyword to display the corresponding topic in the right pane.
Search	Locate words or phrases within the content of your topics. Type the word or phrase in the text field, press Enter, and select the topic you want from the list of topics.

When viewing information in one topic you can easily look up a word by pressing Ctrl+F (simultaneously) keys on your keyboard. This opens up a dialog box, where you can specify search for a specific word.

The ArchiOffice Help is provided to you in a tree like structure. Many help topics include blocks of text that are hidden when the help topic is first opened. Hidden text blocks are

indicated with a ( ) button. To view a hidden block of text, click on (+). To hide the block of text, click close (-).

HOW DO I PRINT HELP?

You can print topics and help information right from the browser window of your in-product help.

To print a Help topic:

1. Open the Help and locate the topic you want to print.
2. From the Help window, right-click in the right pane and select **Print**. The Print dialog box opens.
3. Click **Print**. The topic is printed to the specified printer.

CONTACT BQE

You can contact us for information about the latest products and services, ordering products, training and consulting, technical support, report customization or any other business query.

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BQE Blog:	blog.bqe.com
User Forum:	Facebook Page
Services:	www.bqe.com/Services

Sales

Contact our sales representative for information about the latest products and services.

Telephone:	1 (855) 687-1028 (Within USA) +1 (310) 602-4020 (Outside USA)
Website:	www.bqe.com
Email:	sales@bqe.com

Technical Support

Contact the BQE Support Team for technical support. For the fastest possible service, please gather the following information before contacting us:

- Product serial number (registration number)
- Your name, company name and phone number
- Exact product name and version number (displayed at the top of the ArchiOffice screen)
- Type of operating system (e.g., Windows 7)
- Complete description of the issue, including steps to reproduce it
- Exact wording of any messages displayed when you encountered the problem
- Steps taken to resolve the problem
- All previous email threads with BQE Software about the issue, if any

Telephone:	1 (310) 602-4030
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START UP

Installation

INSTALLATION OVERVIEW

ArchiOffice 2017 is a server-based program requiring one machine to function as the server, which will host the ArchiOffice data. If you have only a single license for your firm, the machine you use to access ArchiOffice will also function as the server. There is no need for you to install any software on your client computers. Read the ArchiOffice Getting Started Guide for installation procedures and details.

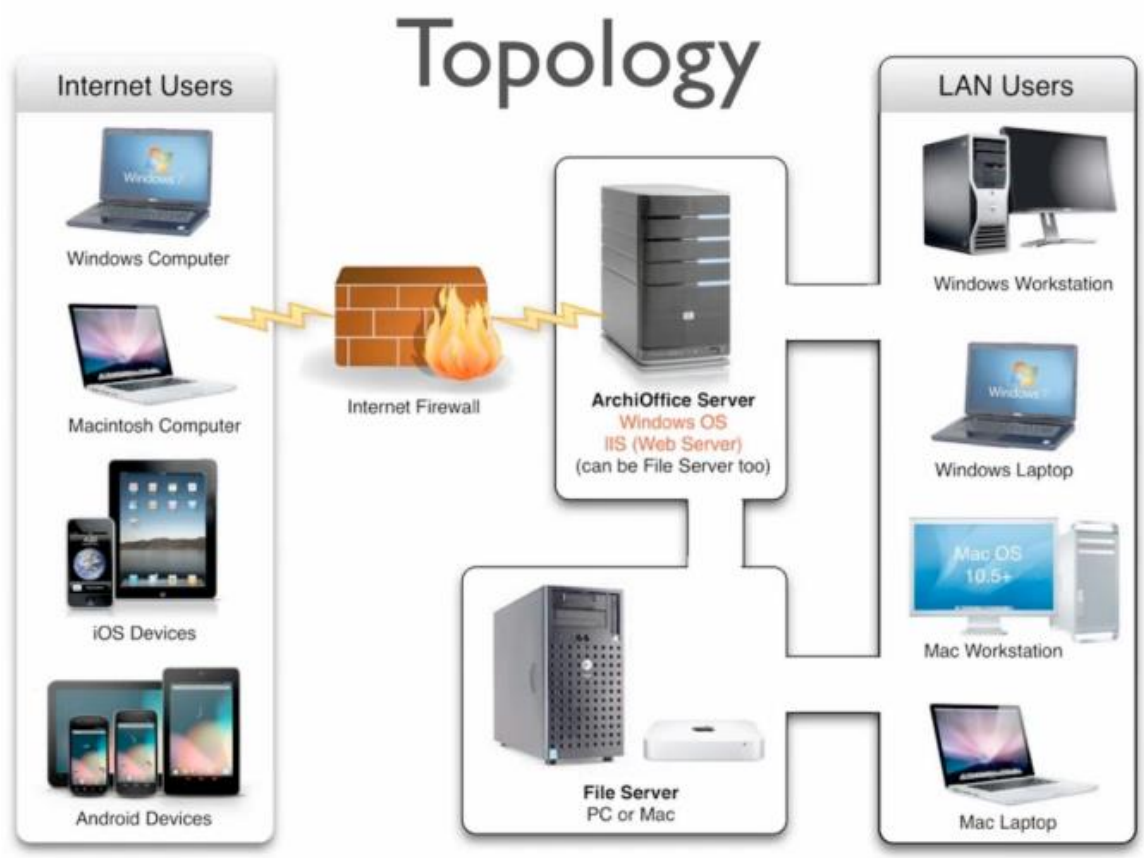
If you are an existing ArchiOffice user, you can upgrade to the new ArchiOffice 2017 version. Please check the Upgrade Data to ArchiOffice 2017 whitepaper for conversion details.

After ArchiOffice is installed on its server, company data can be accessed by employees on your firm's local area network (LAN) or over the internet by employees outside the office. Project related documents can be stored directly on the ArchiOffice server or on a separate file server. We recommend that the file server and the application server are on separate machines. The following scenarios are possible:

Your documents must be stored in a shared folder on the file server and all users must have full access to them from ArchiOffice.

- Windows application sever & Mac file server on separate machines
- Windows application sever & Windows file server on same machine
- Windows application sever & Windows file server on separate machines

Because the browser-based ArchiOffice uses Microsoft's .Net technology, it can run on multiple platforms (for example, Windows, iOS, and Android) and devices (that is, desktop, laptop, and mobile devices).



Although this diagram refers to ArchiOffice, it also applies to EngineerOffice. They use the same technology and network arrangement.

Reference

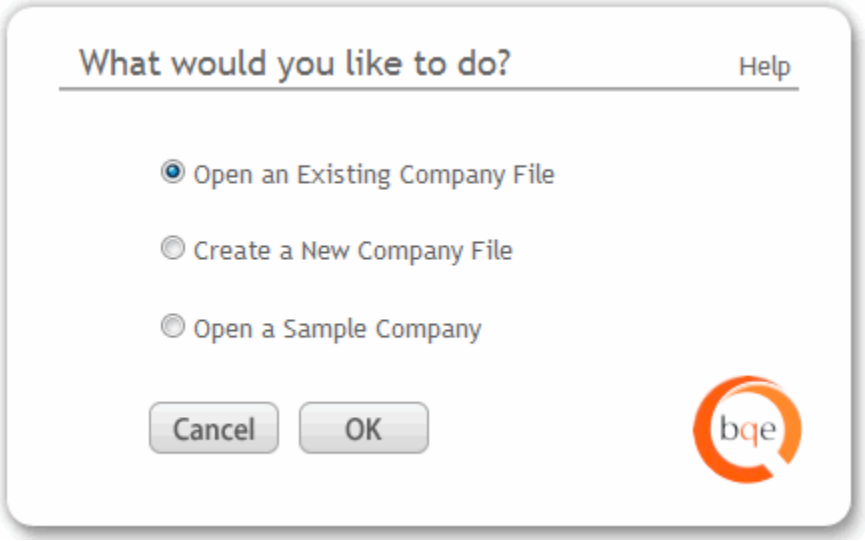
ADMIN OPTIONS

The ArchiOffice Admin Options are used for creating and changing your company database file or opening a sample database.

If you have previously used ArchiOffice, it automatically opens the database that you previously used. If you are running ArchiOffice for the first time, you have to create a database in which all of your employee, client, project, and billing information will be stored.

To access this screen, click the *Admin Options* link on the ArchiOffice login screen.

You will be prompted to enter your Windows administrator login the first time you access this screen.



The following information provides details on the Admin options:

Open an Existing Company:
Choose this option to select an existing ArchiOffice database.

Create a New Company:
Choose this option to create a new ArchiOffice data file.

Open a Sample Company:
Choose this option to explore ArchiOffice features using a sample database.

Cancel:
Closes the screen.

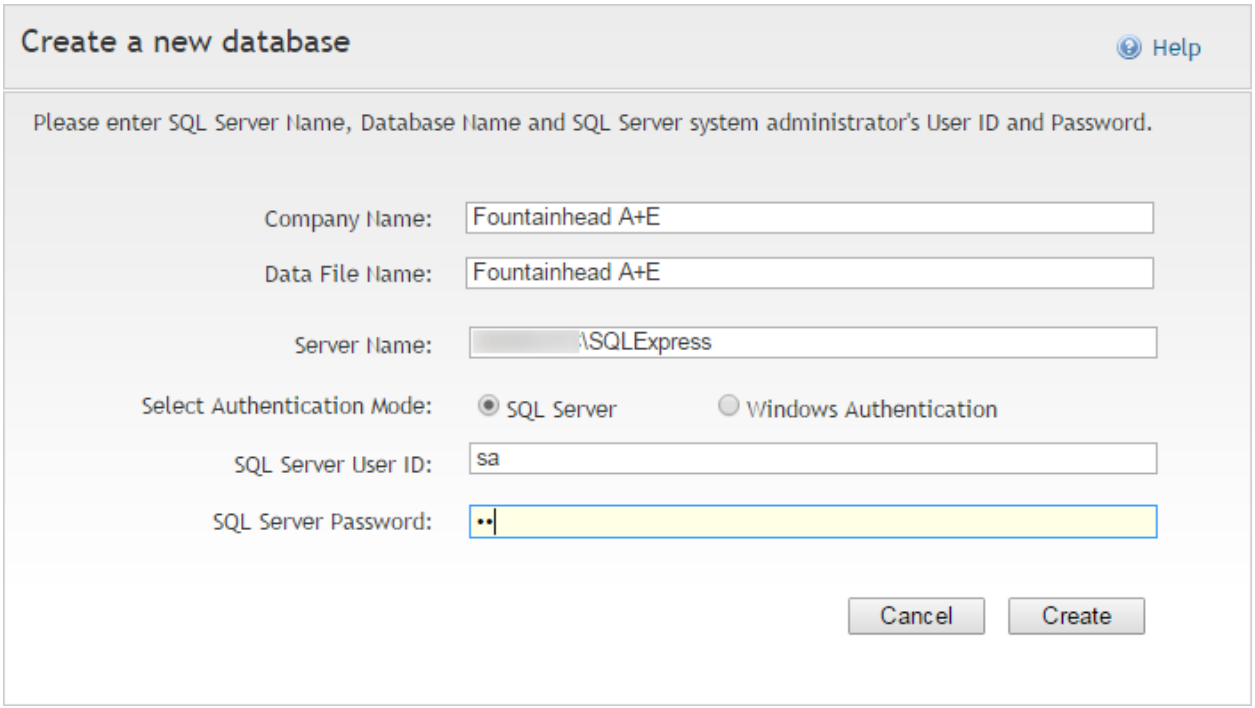
OK:
Saves the settings and closes the screen.

Admin Options Button Panel

Help:
Opens the ArchiOffice Help in the Admin Options section.

NEW DATABASE

To access this screen, click the Admin Options link on the ArchiOffice login screen.



Company Name:
The company name is a required field for maintaining a licensed ArchiOffice database. The field is limited to 95 characters. This company name displays on all invoices. Your ArchiOffice license key is based on your company name.

Data File Name:
Name of the company's SQL database file.

Server Name:
Name of your web server.

Select Authentication Mode

> **SQL Server:**
> Choose this option to use SQL server authentication to access your company's database.
>
> **Windows Authentication:**
> Choose this option to require establishing a connection to the SQL Server using the Windows Logon credentials (that is, Windows Username and Password) when accessing the company's database.

SQL Server User ID:
Enter your user ID when using the default authentication method.

SQL Server Password:
Enter your password for the SQL server. For example, if the server name is SQLExpress, enter SQLExpress, ComputerName\SQLExpress, or .\SQLExpress.

EXISTING DATABASE

The Admin Options link on the ArchiOffice login screen is used to open an existing company.

Data File Name:
Name of the database used by the ArchiOffice company. This could be different from your company file name.

Server Name:
Name of your SQL Server.

Select Authentication Mode

SQL Server:
Choose this option to use SQL server authentication to access your company database.

Windows Authentication:
Choose this option if you want to use Windows Authentication when accessing the company database.

SQL Server User ID:
User ID for the SQL Server.

SQL Server Password:
Enter the corresponding password here.

LICENSE REQUEST

To request your software license keys, please email support@archioffice.com and mention your company name exactly as it appears in ArchiOffice.

After Technical Support receives your license key request, they will email your license key to you. After you receive it, see How Do I License ArchiOffice for further instructions.

SOFTWARE UPDATES

Periodically, BQE Software provides updates to ArchiOffice that you can download. These updates comprise of maintenance, software updates or new feature releases. ArchiOffice is set up to display update notifications on the login screen whenever updates are available for download.

Use the Show Patch Update Message Users - Defaults preference to control who can view the update notifications when an update is available. When you click on the update notification link on the login page, you are prompted to run or save the service pack or software update.

Points to remember when updating ArchiOffice:

- Make sure all ArchiOffice users exit the system.

- Back up ArchiOffice data before applying updates.
- The update should only be installed on the ArchiOffice server by the administrator.

Database Backup

DATABASE BACKUP OVERVIEW

Backup is an exact copy of your company file. This provides an alternate and complete database if your computer fails, hard disk crashes or you accidentally erase information from the working database. You should back up your data at the end of each session or day. We highly recommend that you back up your database regularly and store multiple backup files on appropriate storage devices.

Your ArchiOffice data is stored in an SQL database using either Microsoft SQL Server Standard or SQL Server Express. You can back up the database using either Microsoft SQL Server Management Studio or a third-party program.

How Do I

HOW DO I BACK UP COMPANY DATABASE?

To back up the Microsoft SQL Server Standard or SQL Server Express database (2008 or later) containing your ArchiOffice database, do the follow:

1. Make sure you are logging in as an administrator on the Windows server.
2. Open the SQL Server Management Studio.
3. On the *Connect to Server* screen, verify the correct server name (for example, Username\SQLExpress) is selected.
4. Select **Windows Authentication** from the *Authentication* drop-down list and click **Connect**.
5. After connecting, expand the *Databases* list and right-click on the database to be backed up.
6. From the right-click menu, select **Tasks > Back Up**.
7. On the Back Up Database screen, in the *Destination* section, click **Remove** to delete the standard backup location (for example, C:\Program Files\Microsoft SQL Server\MSSQL.X\MSSQL\Backup\DatabaseName.BAK).
8. Make sure the **Disk** option is selected (not Tape) and click **Add** to specify a new backup location.
9. Browse to select a new backup destination folder. Make sure *Files of type* is set to Backup Files (that is, *.BAK extension) and enter a backup filename.

Make sure that the user group (SQLServer200XMSSQLUser$ComputerName$InstanceName) has full rights to read and write from the directory where you are saving the .BAK file. This is a user group that SQL creates in your Security when installed on a server.

10. Confirm the full directory path and then click **OK**.

11. On the Back Up Database screen, verify Full is selected from the *Backup type* drop-down list and then click **OK** to start the backup process.

SERVER AUTHENTICATION

ArchiOffice stores your company data in an SQL database. The SQL Server enables ArchiOffice to connect to the server and your database file via two different modes: SQL Server Authentication and Windows Authentication. You must select one of these modes when opening an existing ArchiOffice company file or creating a new one. The following information discusses the differences between the two authentication methods.

SQL Server Authentication Mode/Standard Security

A member of the *sysadmin* fixed server role first specifies to SQL Server all the valid SQL Server login accounts and passwords. These are not related to your Microsoft Windows account or network account. You must supply both the SQL Server login and password when you connect to SQL Server. You are identified in SQL Server by your SQL Server login.

Windows Authentication Mode/Trusted Connection

A member of the SQL Server *sysadmin* fixed server role must first specify to SQL Server all the Microsoft Windows accounts or groups that can connect to SQL Server. When using Windows Authentication, you do not have to specify a login ID or password when you connect to SQL Server. Your access to SQL Server is controlled by your Windows account or group, which is authenticated when you log on to the Windows operating system on the client. When connecting, the SQL Server client software requests a Windows trusted connection to SQL Server. Windows will not open a trusted connection unless the client has logged on successfully using a valid Windows account. The properties of a trusted connection include the Windows group and user accounts of the client that opened the connection. Because it is impossible for a trusted connection to be completed without Windows having first authenticated the user, SQL Server does not have to do anything to authenticate your accounts. SQL Server gets the user account information from the trusted connection properties and matches it against the Windows accounts defined as valid SQL Server log-ins. If the SQL Server finds a match, it accepts the connection. Your Windows group or user account identifies you in SQL Server.

When SQL Server is running on Windows, members of the sysadmin fixed server role can specify one of two authentication modes:

- **Windows Authentication Mode:** Only Windows Authentication is allowed. You cannot specify a SQL Server login ID.

- **Mixed Mode:** If you supply a SQL Server login ID when you connect, you are authenticated using SQL Server Authentication. If you do not supply a SQL Server login ID, you are authenticated using Windows Authentication.

These modes are specified during the setup of a company file or with SQL Server Enterprise Manager.

One of the properties of a login is the default database. When a login connects to SQL Server, this default database becomes the current database for the connection, unless the connection request specifies that another database be made the current database. For any query, please contact support.microsoft.com.

ARCHIOFFICE TUTORIAL

This tutorial covers the basic procedures involved in project setup, time tracking, billing, payment, project management and reporting.

Contacts

The Contacts screen is used to create and maintain profiles of contacts such as employees, clients, contractors, consultants, and anyone related to a project. Contact information can be entered manually or, if your contacts are maintained in another program, you can import that data into ArchiOffice as well as synchronize them with Microsoft Outlook, Entourage or Apple Contacts.

To enter contact information:

1. Click the **Contacts** tab on the navigation bar.

2. It displays a list view of your contacts. Select **New** from the *Action* drop-down list on the button panel to add a new contact.

3. Enter the required information about the contact on the Work tab such as Name, Company, Address, Phone, etc. The default settings specified in Preferences are automatically applied when a new contact is created.

You can add more address tabs to this screen by clicking . Additional tabs provide the ability to enter multiple addresses and phone numbers (that is, home, billing, job site, assistant, etc.). This helps keep the contact details organized and easily accessible.

4. Click **Save**.

All projects are built based on the client's contact information. Before proceeding to create a project, you must have entered the client's contact details (for example, address and phone) first.

Projects

The Projects screen allows you to create and maintain a profile of your projects or jobs. Default settings specified in Preferences are automatically applied when a new project is created.

1. Click the **Contacts** tab on the navigation bar.

2. Select a listed contact to edit.

3. Click the **Projects** tab located below the contact details.

4. Select **New** from the *Action* drop-down list on the *Project* tab's button panel.

5. Enter the required information such as the type of project- Billable (contract work that will be billable), RFP (pre-contract) or Internal (internal office work that is non-billable or project related), client, project name and number.

6. After entering this information, you automatically move from the *Contacts* screen to the *Projects* screen.

7. On the *Details* tab, you can enter the project's basic details such as employees (team) working on the project, and phases and job codes included in the scope of this project as stipulated in your contract. In addition, phases and job codes can have sub classifications to accommodate consultant fees or any other sub categories related to budgeted phases and job codes. Click **Save** on the *Project-Details tab* button panel.

8. Click the **Projects-Billing** tab. Select **Options** from the drop-down list on the tab's button panel and set the project's Invoice Method. This is important prior to entering the project's budget.

9. Select Budget from the *Projects-Billing tab's* drop-down list. You will see that the phases (sub phases), job codes (sub-job codes) have already been set. Enter the fees and hours budgeted for each phase. This will coincide with information stipulated in your contract.

Budgets must be set for all projects (hourly, stipulated sum, percent of construction or unit cost). Without a budget, you will not be able to effectively report on or evaluate the efficiency of your projects. Hourly projects do not require a budget, but it is important for you to estimate your fees and the time that you will spend on each phase of the project so you can manage each project accurately to ensure profitability.

After project setup, you and your team members can begin tracking time on it.

Time and Expense

The Time/Expense screen is where all time and expenses are entered in ArchiOffice. It displays all the existing time and expense entries in the system.

1. Click the Time/Expense tab on the navigation bar.

2. On the *Time* tab, select an employee from the drop-down list (your login name is pre-selected by default).

3. Below the grid, enter the required information such as date, project, job code, task/description, hours, etc.

4. Specify whether the time entry is chargeable or not by selecting/clearing the Charge check box.

5. Click ⊕ to add the time entry.

6. Click the Expense tab and select an employee from the drop-down list.

7. Enter the required information such as date, project, expense type, description, etc.

8. Specify whether the expense entry is non-reimbursable (NR) or employee reimbursable (ER) by checking the relevant check box.

9. Enter the quantity and rate of the expense.

10. Click ⊕ to add the expense entry.

If you prefer, both time and expenses can be entered on the Detail tab. Here, you have the option of using a timer to track your time, place a time and expense on hold, enter notes and so on.

Billing

ArchiOffice provides several options for generating invoices and applying payments. For each project, you can generate invoices using the Projects-Billing screen. Here you can set the defaults and billing options for a project. You can also perform the billing functions using the Billing screen.

To generate invoices:

1. Click **Projects** on the navigation bar.

2. Select a listed project to edit.

3. On the *Projects* screen, click the **Billing** tab and select Options from the drop-down list on the tab's button panel.

4. Here you will see the invoice method previously selected when the project was created. If necessary, select a different invoice method. In this explanation, we will use Stipulated Sum as the Invoice method. In the stipulated sum grid, enter the amount to be billed.

5. Select each tab below the stipulated sum grid and set the appropriate options for the invoice, including the invoice format and output settings.

6. Selecting **New** from the *Action* drop-down list to generate the invoice.

After an invoice is generated, it becomes a *draft invoice*, which can then be finalized and sent to the client.

The Billing screen is used to view and generate invoices for projects. You can also view outstanding, draft and historical invoices here and apply payments to outstanding invoices.

To produce an invoice in batch mode, do the following:

1. Click the **Billing** tab on the navigation bar.
2. On the *Billing-Projects* tab, use the filters to view only projects with unbilled time and expenses.
3. Select the check box for the projects you want to bill.
4. Select **Generate Invoice** from the *Action* drop-down list to create an invoice and enter the invoice date. This creates draft invoices.
5. Review or print the drafts.
6. Click the Drafts tab.
7. Selecting the check box of listed draft invoices and select **Finalize** from the *Action* drop-down list. Finalized invoices can be printed from the *Project* screen as well.

Payments

Payments can be applied for individual projects using the Projects screen.

To apply payments:

1. Click **Projects** on the navigation bar and select a listed project record.
2. Click the **Billing** tab and select **Transactions** from the drop-down list on the tab's button panel.
3. Select **New** from the *Billing* tab's *Action* drop-down list to record a new payment.
4. Enter the payment date and corresponding notes (that is, check number, payment details, etc.).
5. Select the payment option.
6. Enter the payment amount received and confirm the amount to apply.
7. Click Apply on the grid for the corresponding invoice.

8. Click **Done** when finished.

If you prefer to enter the payment in a batch mode, you can do so from the Billing screen.

1. Click **Billing** on the navigation bars and then click the **Outstanding** tab.

2. Find the desired invoice for the payment. Use the filters as needed.

3. Click **Enter Payment** to apply the payment for an invoice.

4. It will automatically open the *Transactions Detail* screen where you can enter the payment (*as explained above*).

Reports

The Reports screen allows you to save and run standard and custom reports in a detailed or summarized layout. You can also view your reports in different formats such as PDF, RTF or Excel. We recommend that you check each category and run the reports included and see how each would best represent your data. After you have the report filters and criteria set properly, you can save the report for future use.

1. Click the **Reports** tab on the navigation bar.

2. Choose a report from the *Standard Reports* list on the left.

3. Specify the display details for the selected report such as *Type, Sort By, Output Format*, etc.

4. After configuring the report settings, click **Run Report** to view it.

5. If you want, click **Memorize** to save your report as a custom report.

Navigation

NAVIGATION OVERVIEW

Navigation through ArchiOffice is made easy by ensuring that standard navigation elements are consistently used throughout the system.

The main navigation elements are as follows:

- Navigation
- Navigation Bar
- List View
- Detail View
- My List
- Grids

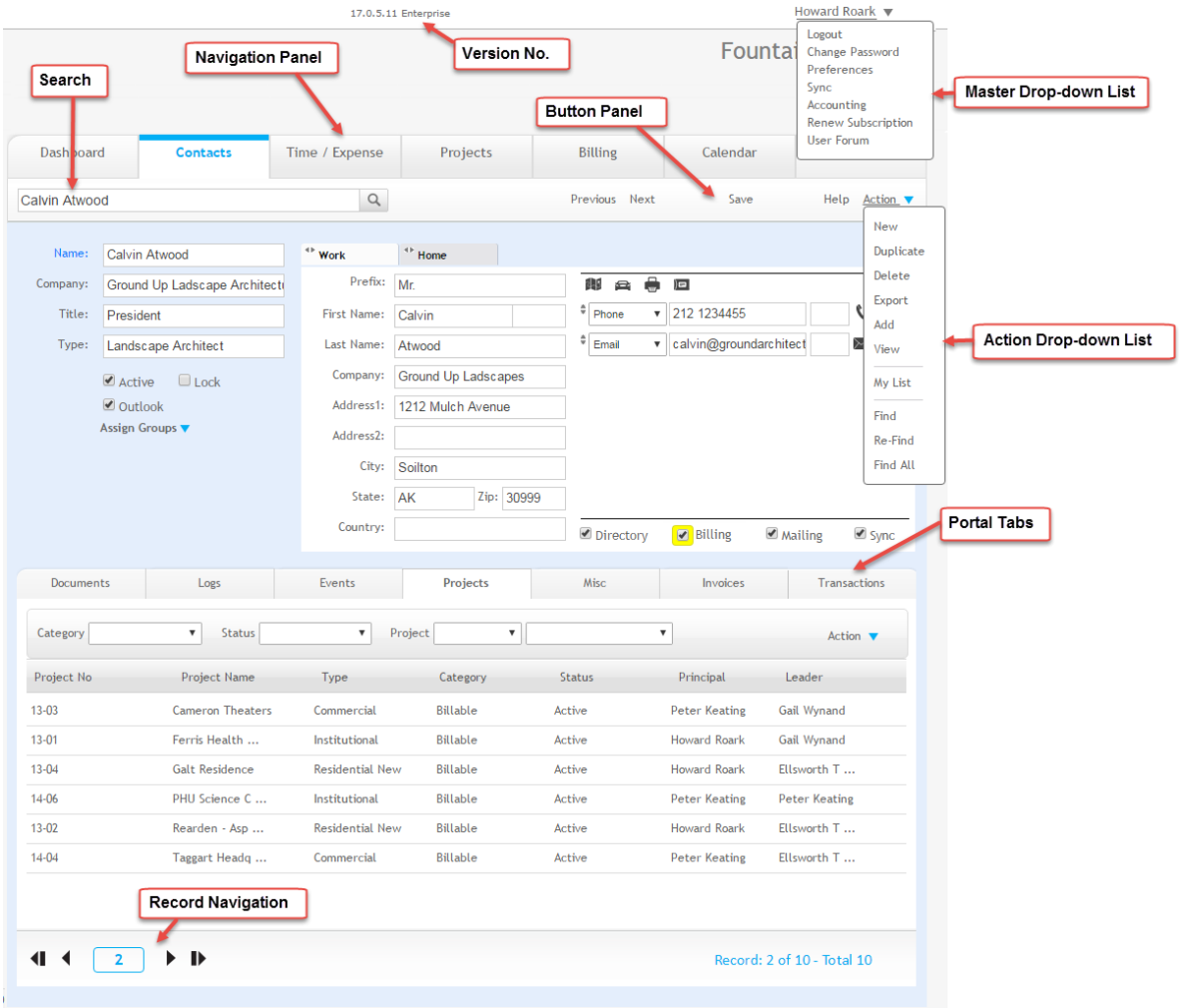
- Portals
- Portal Filters
- Pop-Up Calendar
- Find

Each of the navigation element has a specific purpose and is discussed in detail. Click on any item to learn more.

NAVIGATION

ArchiOffice includes user-friendly navigation options like the navigation bar, tabs, Dashboard, action drop-down lists, links, spreadsheet-like grids and other user interface elements. The following information covers the most frequently used navigation options in ArchiOffice.

Security permissions determine what features, functions and information you can access and view.



Version Number

The ArchiOffice version number displays at the top left side of the ArchiOffice screen.

User Login Info

The name of the currently logged in user always displays at the top of the ArchiOffice screen, adjacent to the master drop-down list.

Master Drop-Down List

This list is located at the top of the ArchiOffice screen, next to the user ID. Click the drop-down arrow to display the options. The options available on this list include:

Logout

Select this option to logout of ArchiOffice. For security purposes, we highly recommended that you log out of the system after completing your work.

Change Password

Opens the Change Password screen, which allows you to change your ArchiOffice login password. You must enter your old and new password, and then confirm the change.

Preferences
The Preferences component gives the system administrator access to set up general system preferences, general defaults, logos, document paths, web access, accounting settings and more.

Sync
This option is used to initiate synchronization between ArchiOffice and external applications such as Microsoft Outlook, Entourage or Apple Calendar.

Accounting
Select this option to send data to or get data from your QuickBooks company file and configure synchronization settings.

User Forum
Takes you to the ArchiOffice Facebook page where ArchiOffice users interact with each other, post feedback and ask questions.

Renew Subscription/Buy Now:
If you are a licensed user, the Renew Subscription option takes you to the BQE Subscription Renewal web page, where you can renew your existing ArchiOffice subscription. In case of a new user during the 15-day evaluation period, the Buy Now option is visible that redirects to the BQE Ready-To-Buy web page, where you can purchase a licensed version of the software.

Navigation Bar

Use the navigation bar to move between the main modules of ArchiOffice and its Dashboard.

Button Panel

Most of the tabs and sub-tabs of ArchiOffice have a row called a button panel. While the available options vary, the following are the most common items available on the button panels:

Help
Clicking this option opens the ArchiOffice online help file.

Print
Depending on the currently displayed screen, clicking this button either generates a mini report based on the information current screen or a screen-shot of the screen.

Search 
Use this search field to locate records quickly using any criteria for searching (that is, first name, last name, project ID, etc.). The field's predictive search instantly display results as you type in this field.

Action Drop-Down List 
Click this drop-down arrow to access to options available for the currently viewed screen (for example, delete, new, add, find, My List, etc.). The options vary based on the module or screen being used.

Portals

ArchiOffice has sub-tabs in screen such as Contacts and Projects that list related information from other parts of the system (for example, documents, events, and projects). These are referred to as portals. They are similar to the widgets on the ArchiOffice Dashboard.

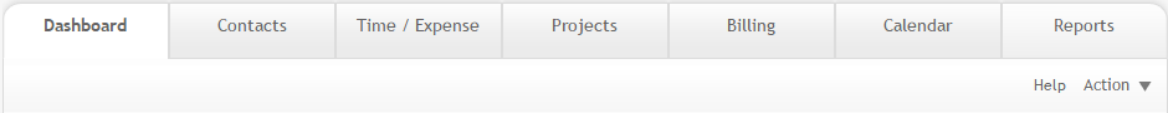
Record Navigator

The record navigator is available on the bottom of certain screens such as Contacts, Time/Expense, and Projects displaying a found set of records. Use the navigating links to move quickly through pages of listed records.

Button	Function	
	First Record	Click to go to the first record in the found set of records. If you are on the first record in the found set of records, you will remain on the first record.
	Previous Record	Click to go to the previous record in the found set of records. If you are on the first record in the found set of records, you will remain on the first record.
	Next Record	Click to go to the next record in the found set of records. If you are on the last record in the found set of records, you will remain on the last record.
	Last Record	Click to go to the last record in the found set of records. If you are on the last record in the found set of records, you will remain on the last record.

NAVIGATION BAR

The navigation bar is used to move from screen to screen within ArchiOffice. It consists of seven tabs, each representing a module of ArchiOffice. Each of the modules will be covered in detail in appropriate sections of this help file.



Dashboard
Click to go to the ArchiOffice Dashboard where you can view charts (for example, Profitability, Invoicing, Receivables and Aging) and portals (for example, Projects, Contacts, etc.).

Contacts
The Contacts module of ArchiOffice is used to create and manage contacts.

Time/Expense
The Time/Expense module of ArchiOffice is used to create and manage time and expense entries.

Projects
The Projects module of ArchiOffice is used to create and manage projects.

Billing
The Billing module of ArchiOffice is used to create and manage invoices and payments.

Calendar
The Calendar module of ArchiOffice is used to create and manage events and To-Do's on user schedules.

Reports
The Reports module of ArchiOffice is used to access and print all reports of data contained within the Contact, Time/Expense, Projects, Billing, and Calendar modules.

DASHBOARD

The ArchiOffice Dashboard is the first thing you see when you log in. It gives you a quick snapshot of the current activity in ArchiOffice. It displays widgets (that is, mini applications) that give you a quick view of the various modules of ArchiOffice (that is, Time/Expense, Appointments/Milestones, To Do List, News, Contacts, Projects and Project Performance, and Connected Users). The Dashboard also displays charts that give you a financial snapshot of your business (Invoicing, Profitability, Accounts Receivable, Realization, Time/Expense, Hours and Payments).

The widgets displayed on the Dashboard are determined by your user security settings. The Preferences settings are configured by your ArchiOffice administrator. The administrator specifies the views to which you have access. This allows the admin to control which users have access to financial charts. Up to 15 widgets can be displayed on the Dashboard. You can choose to view fewer or more widgets on the screen, apply filters on them, print the charts, create new items or find items.

This feature is available in the ArchiOffice Pro and Enterprise editions only.

News: This is a news feed widget to provide you with useful information from BQE.

Appointments/Milestones: It displays information such as appointments and milestones for active projects only.

Project Performance: It lists projects from the most profitable to the least. You can choose Accrued or Cash to view cost, payment and profit values based on the accounting method used by your firm. When you click on a project, it takes you to the Projects > Billing > Performance screen.

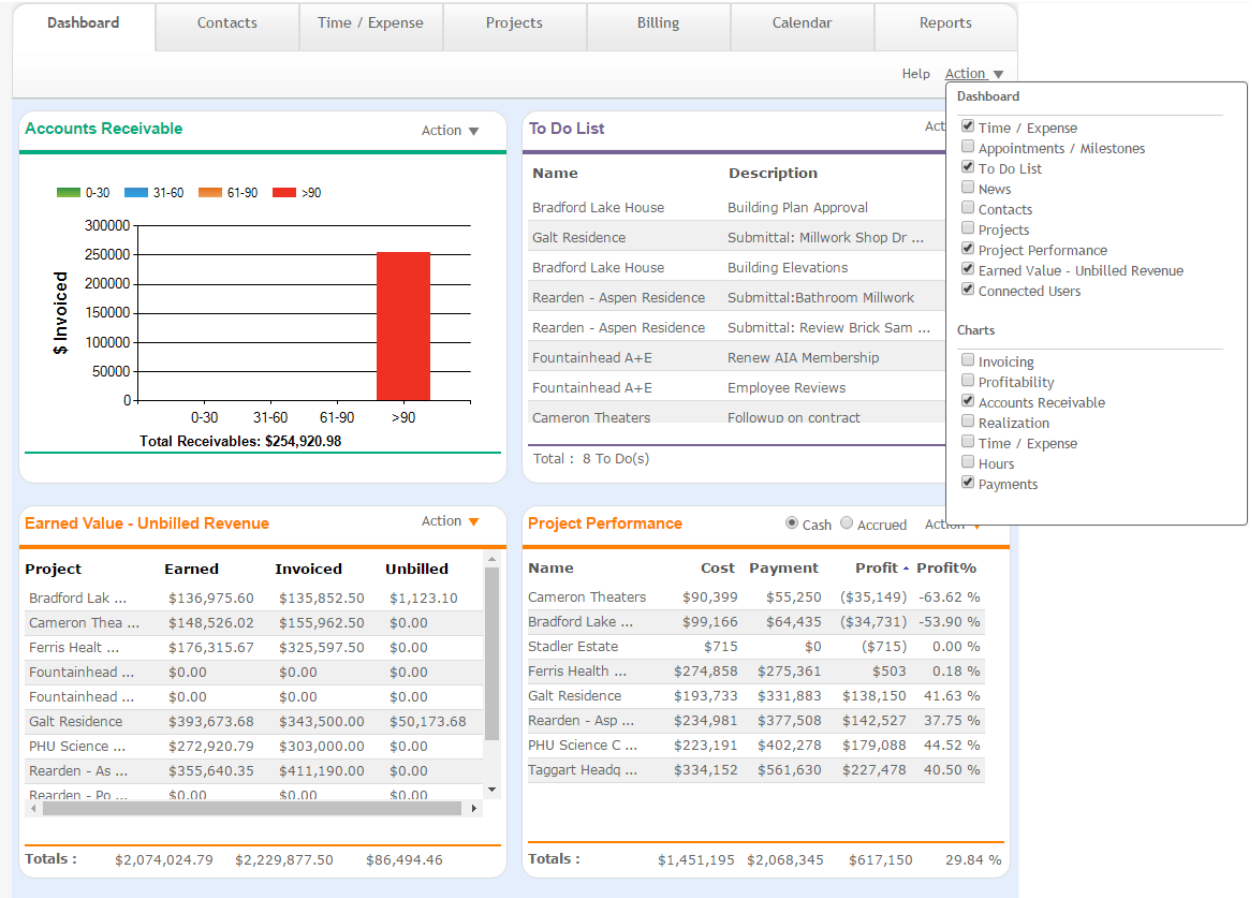
Connected Users: This widget shows who is currently logged in to ArchiOffice, at what time and from which workstations.

This feature is available in the ArchiOffice Enterprise edition only.

Payments: This chart shows month-by-month payments received, both regular and retainer payments. You can also view the respective totals of payments, retainer payments and overall payments for the displayed time period.

Earned Value - Unbilled Revenue: This widget displays earned, billed and unbilled data for each project. When you click on a project, it takes you to the Project > Details screen.

This feature is available in the ArchiOffice Pro and Enterprise editions only.



Customizing the Dashboard

The Dashboard is highly customizable. You can enable/disable widgets, to which you have access, move them around and minimize them to save space.

Adding/Removing Widgets:
To add a widget to the dashboard, click the Dashboard's action drop-down button. Select or de-select the check boxes of options you want to add or remove from the Dashboard.

Moving Widgets:
Widgets can be moved around the Dashboard by dragging-and-dropping them into the desired position. To move a widget, click its title header and drag-and-drop it into the new location.

Minimize/Maximize Widgets:
You can reduce clutter on your dashboard by minimizing widgets. To minimize a widget, click any part of the widgets title bar. Click the title bar again to maximize the widget.

Widget Action Drop-down List:
With the exception of the News Feed, each widget has an action drop-down list. With module widgets (for example, Projects, Contacts, etc.), the action drop-down list provides options to create a new record, run a search, or display the related list view. The other widget Action drop-down list provides options for filtering the data or printing the charts.

You can sort the lists on a widget (for example, To-Do List) by clicking the column headers.

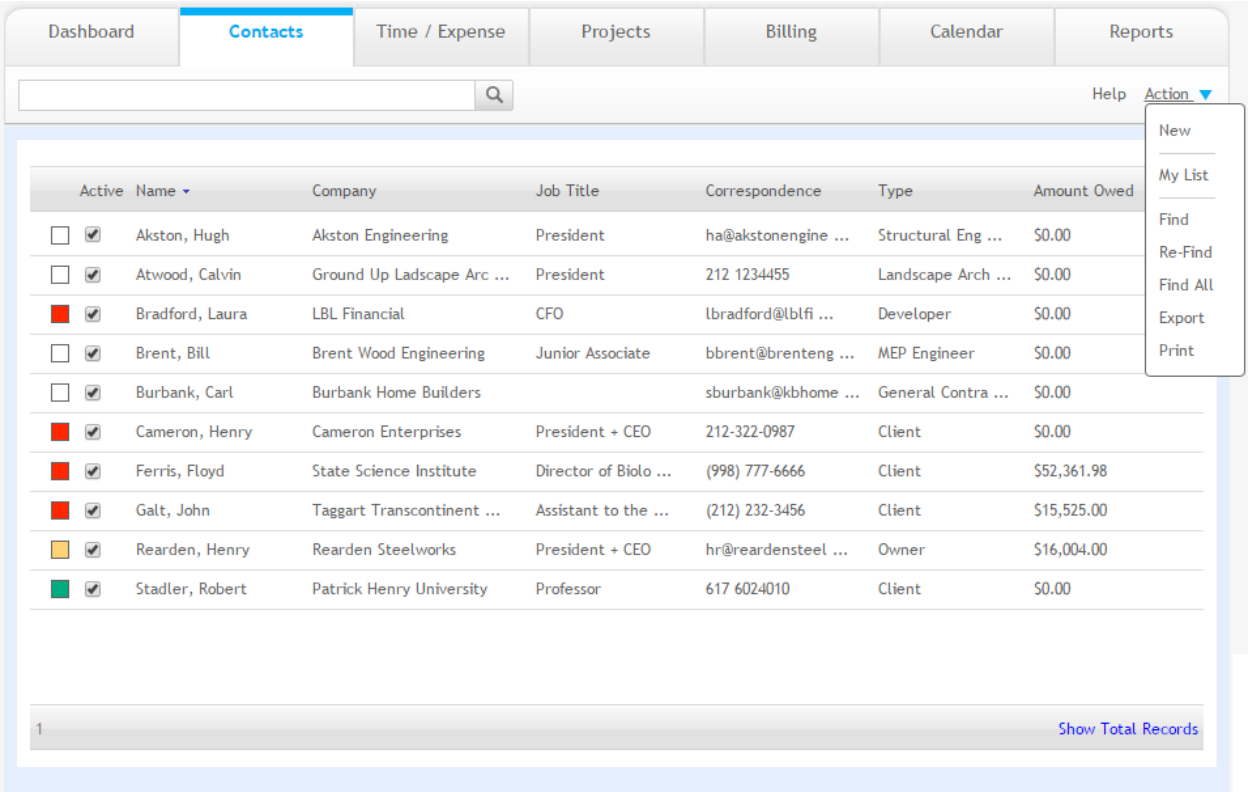
LIST VIEW

Every module in ArchiOffice has a list view that presents an overview of the records in the module. It can display all the records in the module (for example, Billing or Projects), a found set of records resulting from a find that you executed, or only records on your personal list called My List.

Only the Contacts, Projects and Calendar screens support the "My List" feature. In the case of contacts, only the records that you have flagged by checking the Active check box on the record will be included in your My List. In Projects, only the projects where you are an active team member display. In Calendar, only events in which you are a part display.

The list view can be sorted by clicking on any of the column headers. To sort the list view in descending order, click the same column header again. Click any listed record to view its details.

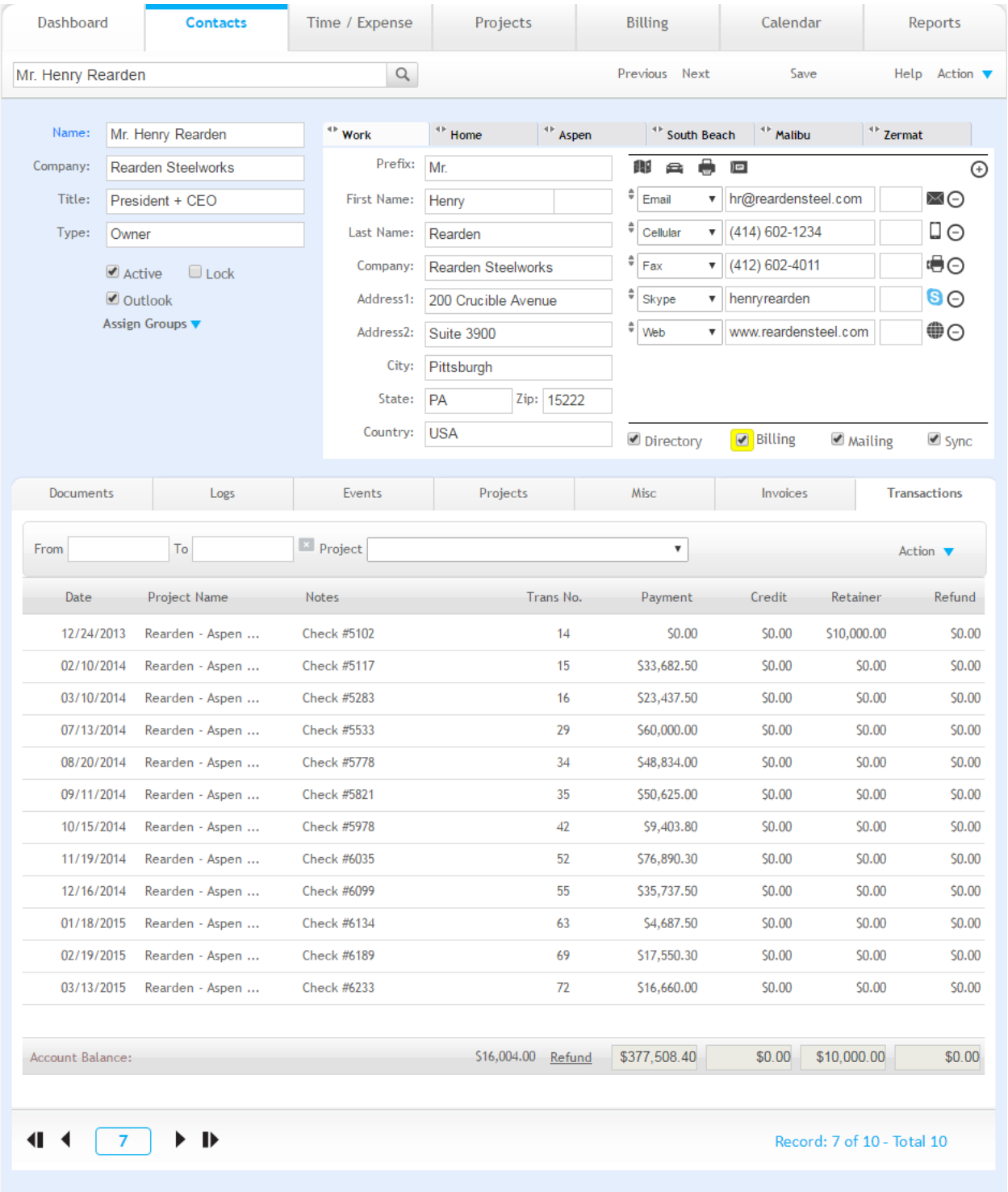
The total number of records displays at the bottom of the list view.



DETAIL VIEW

Every ArchiOffice module has a view that provides detailed information about a particular record. These views are used for editing, in either creating new records or modifying existing ones.

The options that are available in the detail views (for example, the option to delete records) are dependent upon the security privileged granted to users by their ArchiOffice administrator. As an example, you can see the detail view of the Contacts module.



Many detail views show portals that display related information from other parts of the system. All items shown in a portal are related to the current record. Filters are available to limit the amount of information displayed in the portals.

All detail views display the record navigator on the status bar in the bottom right corner. This allows you to navigate through the current Found Set of records.

The detail view will also provide you with the ability to return to the List View.

MY LIST

ArchiOffice provides every user with a My List, a subset of records specific to them in the Contacts, Projects, and Calendar modules. The My List is just a convenient way for you to work with a subset of records that are of interest to you. It does not affect your ability to perform a find to locate other records or view all records in a module.

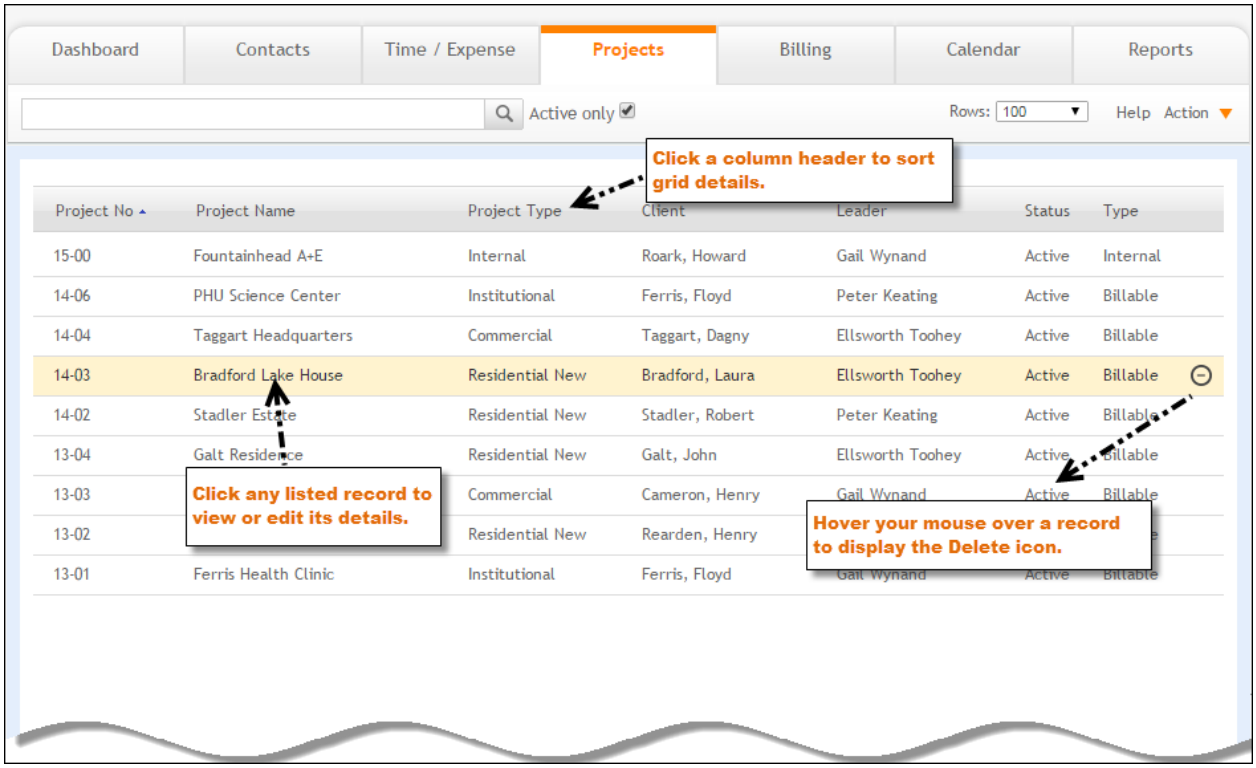
When you view the Dashboard screen, the Contacts and Projects widgets only display their My List of records (Time/Expenses, Appointments and To-Do List items will also be specific to the current user).

When you navigate to the Contacts List View, the default found set of records that displays are only those on your My List. You can include or exclude contact records from your My List by clicking on the Active check box in the Contacts List View. You can also include or exclude contact records from your My List by clicking on the Active check box in the Contacts Detail view.

The only projects that are included on your project My List are those in which you are an active member of the team. Adding project team members and making them active or inactive is a secure privilege reserved for only certain users.

GRIDS

Records are displayed throughout ArchiOffice in a grid format. The following information covers how to navigate ArchiOffice grids:



Sort
Information displayed in the grids can be sorted in ascending or descending order by clicking a column header.

Edit
Click a record to view and edit its details.

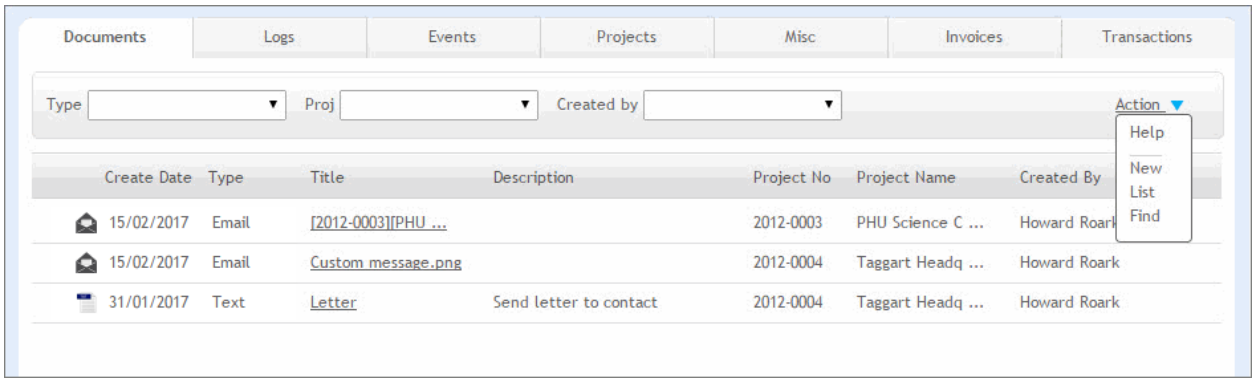
Delete Record
To delete a listed record, hover your mouse pointer over the record and click **Delete** ⊖.

Navigating Multiple Grid Pages
If a grid contains multiple pages of records, you can jump between them by clicking the page numbers below the grid.

PORTALS

ArchiOffice provides screens or tabs that list related information from other parts of the program. These tabs are called portals.

Below is an example of a portal listing a chronological history of all documents associated with a contact or a project. The portal has filters, which enable you to limit the data being displayed only items of interest.



Add Items

The Logs, Notes and Events portals include an *Add Item* row that allow you to quickly add additional items.

Access Information

Any item in the portal can be retrieved by either clicking on them or using the powerful filters to control the information displayed in the portal. The item details will be displayed, or in this case, the linked document will be retrieved from the file server and opened in the native program that created the Document.

Action Drop-Down List

Each portal has an Action drop-down list from which you can select the following:

- **Help**- Select to access help documentation specific to the currently viewed portal.
- **New** - This option initiates the workflow process to add another item. After the item has been created, it will appear in the portal. For example, by selecting this option on the Document portal you can create a new document from the document templates or check-in an external file.
- **Find** - Select to access a search screen where any combination of search criteria can be entered in any of the available fields. After executing the find, you will be presented with the found set of portal items in the portal List view.
- **List** - Select to view all portal items, those matching only portal filters if some have been applied, or the matching records found after executing a Find.

Some portals have additional options on the drop-down list.

Portal List

You can sort items in the portal's list view by clicking the column header to use for sorting (in this example, the Type field is being used). Click the row to view or edit details from a portal list.

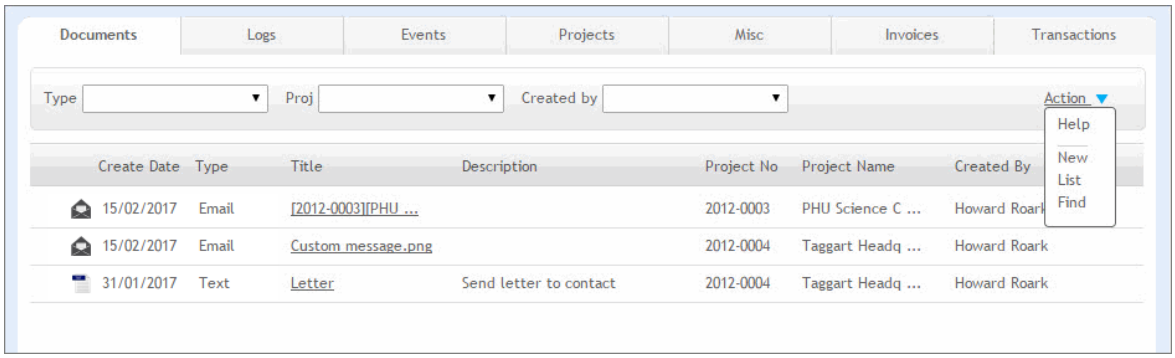
Delete Portal Item

Portal rows often have the Delete ⊖ option on the right side of the row. It is usually visible when you click a row or hover over it. Click ⊖ to remove the selected item. Only privileged users can delete items from the system.

PORTAL FILTERS

Portal filters are one of the most important navigational components in ArchiOffice. The filters are intuitive and help you control what information is displayed in the portal, making it easy for you to locate an item of interest.

On the Documents portal, you can see that it contains a chronological history of all documents for a particular contact. Some of these documents are associated with a project for the contact, others are not, and are linked to the contact directly.



If you have been working with this contact for a long time, you could have literally thousands of documents listed in the portal. The list might include Word, Excel, AutoCad, PDF, JPG, and many other types of linked file.

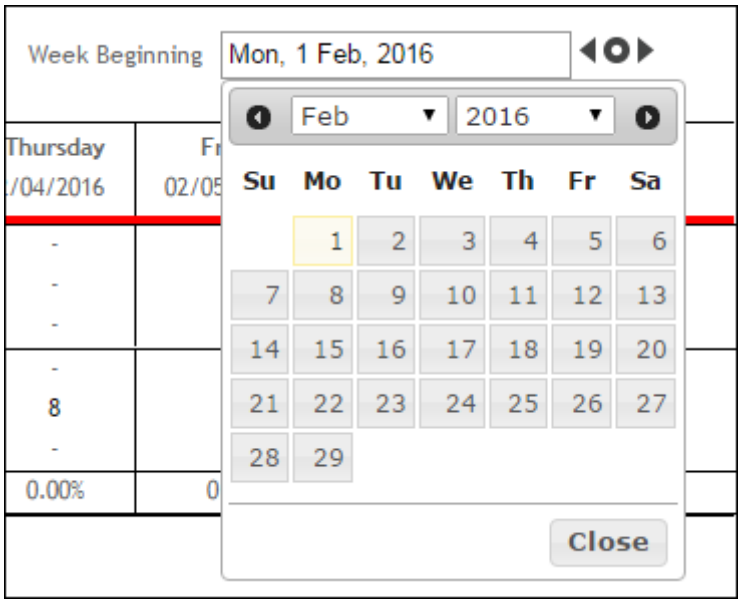
To find a specific item of interest can be rather difficult by scrolling the portal. The filters provide a convenient method to limit quickly what information is being displayed in the Portal.

- For example, if we apply the project filter to the documents Portal, we will only see the documents for that specific project in the portal.
- We can now apply another portal filter by setting the Type of document we are looking for. This now limits the documents in the portal view to only those project documents that exist for the Type selected.
- To remove the filter, click **Clear** ✕ next to the portal filter you want to remove.

POP-UP CALENDAR

When specifying a date in ArchiOffice, you can either manually enter the date or you can select it from the pop-up calendar that automatically displays when you click any date field.

With the calendar, you can quickly locate a date by selecting the month or year from the drop-down lists and then clicking a specific day of the month. In addition, you can use the previous/next arrows to move between months. Click Today to jump to the current date.



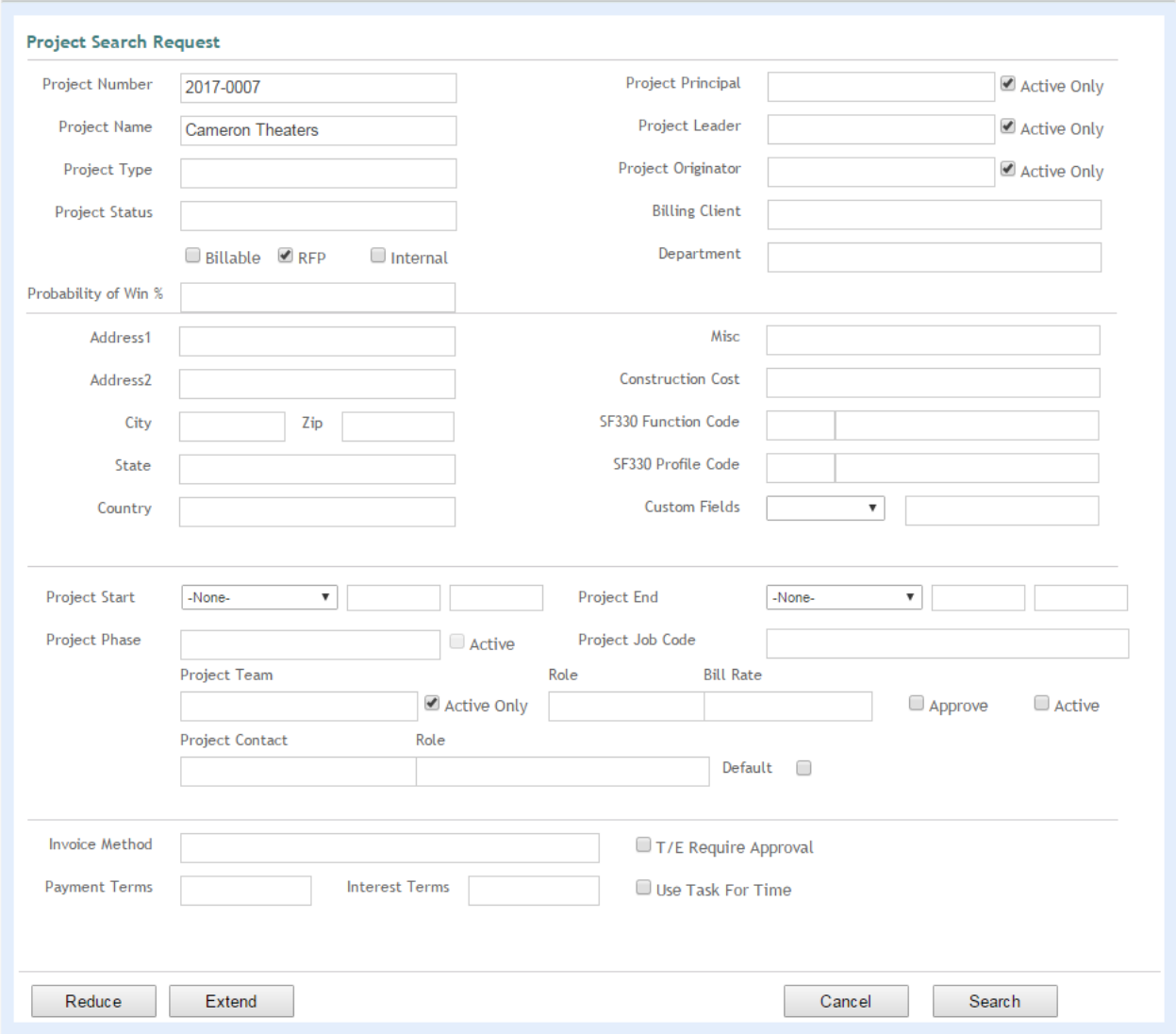
Find

FIND

Every module in ArchiOffice has a Find option, which you can use to locate specific records based on search criteria. Search criteria can be entered into any combination of fields. You do not need to enter information into any or all of the fields.

Click the **Search** button to execute the search. The Found Set of records will be displayed in the List View, or if only one matching record is found, the found record will be displayed in the Detail View.

When searching by date range, use the 4-digit year format for the dates. Separate the start and end dates with three periods. For example, 01/01/2017…06/01/2017 or 1/1/2017…6/1/2017.



FOUND SET

A *Found Set* is a subset of records you are currently working with in a screen. When you work with your personal My List, then only the records on your list are included in the Found Set. If you run a Find, then only the records matching your search criteria are included in the Found Set.

How Do I

HOW DO I SET UP ARCHIOFFICE?

At least one person (administrator) should be assigned the task of setting up ArchiOffice. If you are an administrator, you might want to go through the ArchiOffice Getting Started Guide to help you get started with the program.

Setting up ArchiOffice involves the following steps:

- Step 1 - Install ArchiOffice
- Step 2 - License ArchiOffice
- Step 3 - Set Up System Preferences
- Step 4 - Set Up Clients
- Step 5 - Set Up Existing Projects

Step 1 - Install ArchiOffice

Follow the directions to install the software on your server and client machines.

Step 2 - License ArchiOffice

Your license information is sent to you shortly after purchasing the software. You will be prompted to enter and validate your license key after installing ArchiOffice. You can also enter that information in the license area of Preferences.

Step 3 - Set Up System Preferences

ArchiOffice has many preferences you can configure for the program to suit your firm's specific needs, but there are some preferences that must be configured for ArchiOffice to function properly.

- **System Preferences:** Enter company information, configure default system settings, and set up your company logo.
- **Set your group security**: Set up workgroups and apply the necessary privileges to access ArchiOffice.
- **Users**: After successfully installing ArchiOffice, user accounts need to be set up. This involves entering user details and setting up default setting, assigning users to Work Groups, and setting up all ArchiOffice users (that is, creating login credentials, security privileges, etc.).
- **Contacts**: Specify defaults for new contacts added to the system.
- **Projects:** Specify defaults for new projects added to the system, including the default project numbering. Modify the default phases and job codes to suit your own project needs and modify the default project milestones. In addition you need to build project teams to which users can be assigned and modify default tasks (that is, Tasks) for your project phases.
- **RFPs:** Specify the default RFP numbering, modify the default phases and job codes to suit your own RFP needs, and modify the default milestones to suit your own RFP needs. In addition, you need to Build RFP Teams so you can quickly assign groups of users to a new RFP and modify the default Tasks for your RFP Phases.
- **Documents**: Specify document storage and link paths, set up the default document types that ArchiOffice recognizes, customize ArchiOffice templates filing system. ArchiOffice provides more than 70 Word templates that can be modified so they include your logo, corporate font, privacy notices, etc. You can even create your own templates and add them to ArchiOffice.
- **Billing:** Set some of the default accounting preferences for the system. Enter the G/L account numbers, or account names, for your accounting software. Setup a

default tax model for all your projects, if necessary (no tax is the default). Specify a path where draft and finalized invoices will be stored.

Step 4 - Set Up Clients

Project related contacts, including vendors, clients, and consultants need to either be created new or synced in from Outlook, Entourage or Apple Contacts.

Step 5 - Set Up Existing Projects

Everybody has existing projects that are work-in-progress. Set these up, as well as your new projects in ArchiOffice so your employees can continue working on them. You can also set up internal projects and RFP projects.

HOW DO I LOG IN?

ArchiOffice is a web-based program that can be accessed from any computer or mobile device, in or outside of your firm's office. To access it, you only need the correct URL (that is, web address) and login credentials, which your ArchiOffice administrator can provide.

Read the ArchiOffice Getting Started Guide for login procedures and details.

HOW DO I LICENSE ARCHIOFFICE?

You are required to license the ArchiOffice software prior to use. When you purchase the software, a license key and instructions are emailed to you, based upon the company name and number of users.

Read the ArchiOffice Getting Started Guide for procedures and details.

HOW DO I ALLOCATE LICENSES TO USERS?

An ArchiOffice user must have a license. Users who are not allocated a license cannot log in to the system. These users can still have accounts in the system, have time entries and be added to projects.

To allocate a license to a user:

1. Select Preferences from the *master* drop-down list.
2. Click on **Users** and then **Details**.
3. Select the check box in the *Use License Seat* column (Lic) for the user to which you would like to allocate a license.

4. Click **Save**.

HOW DO I ENABLE SECURED LOGIN?

When ArchiOffice users navigate to the login page, they can select their name from a list of users and then enter their password. To create a more secured login, you can prevent this partial login information from displaying. You will have to enter your user ID and password manually.

1. Select Preferences from the *master* drop-down list.
2. Open the *System* folder and click **Company**.
3. Select the **Use Secured Login** check box and click **Save**.

HOW DO I LOAD SYSTEM DEFAULTS?

ArchiOffice provides several default settings for project phases, job codes, milestones, and tasks. These defaults provide standard options used by most firms. To load them into ArchiOffice, do the following:

This procedure will replace all existing settings with the system defaults.

The following steps cover loading tasks defaults but they also apply for loading other defaults.

1. Select Preferences from the *master* drop-down list.
2. Open the *Project* folder and click **Tasks**.
3. At the top of the *Phases* section, click **Load Defaults**. A confirmation message displays.
4. Click **OK** and then **Save**.

HOW DO I CHANGE MY LOGON AND PASSWORD?

Do the following to change your ArchiOffice logon and password:

1. Click your user name at the top of the ArchiOffice screen and select **Change Password** from the drop-down list.
2. Enter your new logon and password as needed.
3. Click **Change** to apply your changes.

Users with access to Preferences can change user login credentials on its Users-HR screen.

PREFERENCES

PREFERENCES OVERVIEW

ArchiOffice provides a variety of preferences that enable a firm to set up the system to suit its specific needs. You can configure settings to reduce errors and expedite data entry, control the look and feel of the system, manage users and secure data. In addition, options are available to customize document management, and back up and manage your system data.

Defaults
You can use ArchiOffice to set up default settings for a variety of the system's components (for example, project, RFPs, users, contacts and billing). Default settings can be set up to expedite data entry by controlling what selections are available to users when creating projects, adding contacts or entering time. These settings can also be used to reduce errors by controlling what options employees can select when entering data.

Look and Feel
Aside from configuring default settings, ArchiOffice preferences are used to configure the look and feel of the system. You can control what displays on the ArchiOffice Dashboard (for example, portals and charts). In addition, you can set up the company logo to display on your firm's reports and invoices.

Users and Security
Extensive options are available for managing users and securing your data. You can grant or deny privileges to module (that is, Billing, Contacts, etc.) specific features (for example, creating and deleting invoices or deleting contacts). Security options are also available to control what ArchiOffice reports users can view or print. Privileges can be granted on a user-by-user basis or they can be applied by work groups. Other user related preferences include entering HR details for users, setting up email synchronization and time and expense entry defaults.

Document Management
Document management is a big component of ArchiOffice, in preferences you can control the folder structure used to organize project related documents (for example, invoice, notes, etc.) and specify the location of your documents. You can also manage document templates and specify what applications are used to view and edit documents when they are selected within ArchiOffice.

System Maintenance
Beyond setting up system defaults and security, there are preference features that you can use for system maintenance and data management. There are options in ArchiOffice preferences for scheduling database backups and managing ArchiOffice licenses. In addition, through Preferences you can import contact, time and expense data, and set up accounting integration settings (for example, QuickBooks Synchronization).

Custom Reports and Invoices
If you use customized reports and invoices, you can select and configure them in the Preferences screen.

Navigating Preferences

To access the Preferences screen, select **Preferences** from the master drop-down list.

The preferences are organized in a tree structure. To navigate the settings, click a category to expand it and then click one of the listed items to view and edit settings.

Preferences are organized into the following categories:

System • Company • Report Logos • Invoice Logos • Defaults • Formats • Print Setup • Email Settings • Password Policy	RFP • Defaults • Milestones • Teams • Phases/Job Codes • Tasks
Work Groups • Security • Reports	Documents • Template • Types • Paths
Users • Defaults • Formats • Details • HR • Time/Expense • Sync • Other Options • Security • Reports • Performance	Billing • Defaults • Billing Codes • Tax • Labels • Integration
Contact • Defaults • Formats	Custom • Reports • Invoices
Project • Defaults • Roles • Submittals • SF330 • Milestones • Teams • Phases/Job Codes • Tasks • Miscellaneous	Web Access
	Utilities

PREFERENCES OVERVIEW

ArchiOffice provides a variety of preferences that enable a firm to set up the system to suit its specific needs. You can configure settings to reduce errors and expedite data entry, control the look and feel of the system, manage users and secure data. In addition,

options are available to customize document management, and back up and manage your system data.

Defaults
You can use ArchiOffice to set up default settings for a variety of the system's components (for example, project, RFPs, users, contacts and billing). Default settings can be set up to expedite data entry by controlling what selections are available to users when creating projects, adding contacts or entering time. These settings can also be used to reduce errors by controlling what options employees can select when entering data.

Look and Feel
Aside from configuring default settings, ArchiOffice preferences are used to configure the look and feel of the system. You can control what displays on the ArchiOffice Dashboard (for example, portals and charts). In addition, you can set up the company logo to display on your firm's reports and invoices.

Users and Security
Extensive options are available for managing users and securing your data. You can grant or deny privileges to module (that is, Billing, Contacts, etc.) specific features (for example, creating and deleting invoices or deleting contacts). Security options are also available to control what ArchiOffice reports users can view or print. Privileges can be granted on a user-by-user basis or they can be applied by work groups. Other user related preferences include entering HR details for users, setting up email synchronization and time and expense entry defaults.

Document Management
Document management is a big component of ArchiOffice, in preferences you can control the folder structure used to organize project related documents (for example, invoice, notes, etc.) and specify the location of your documents. You can also manage document templates and specify what applications are used to view and edit documents when they are selected within ArchiOffice.

System Maintenance
Beyond setting up system defaults and security, there are preference features that you can use for system maintenance and data management. There are options in ArchiOffice preferences for scheduling database backups and managing ArchiOffice licenses. In addition, through Preferences you can import contact, time and expense data, and set up accounting integration settings (for example, QuickBooks Synchronization).

Custom Reports and Invoices
If you use customized reports and invoices, you can select and configure them in the Preferences screen.

Navigating Preferences

To access the Preferences screen, select Preferences from the master drop-down list.

The preferences are organized in a tree structure. To navigate the settings, click a category to expand it and then click one of the listed items to view and edit settings.

Preferences are organized into the following categories:

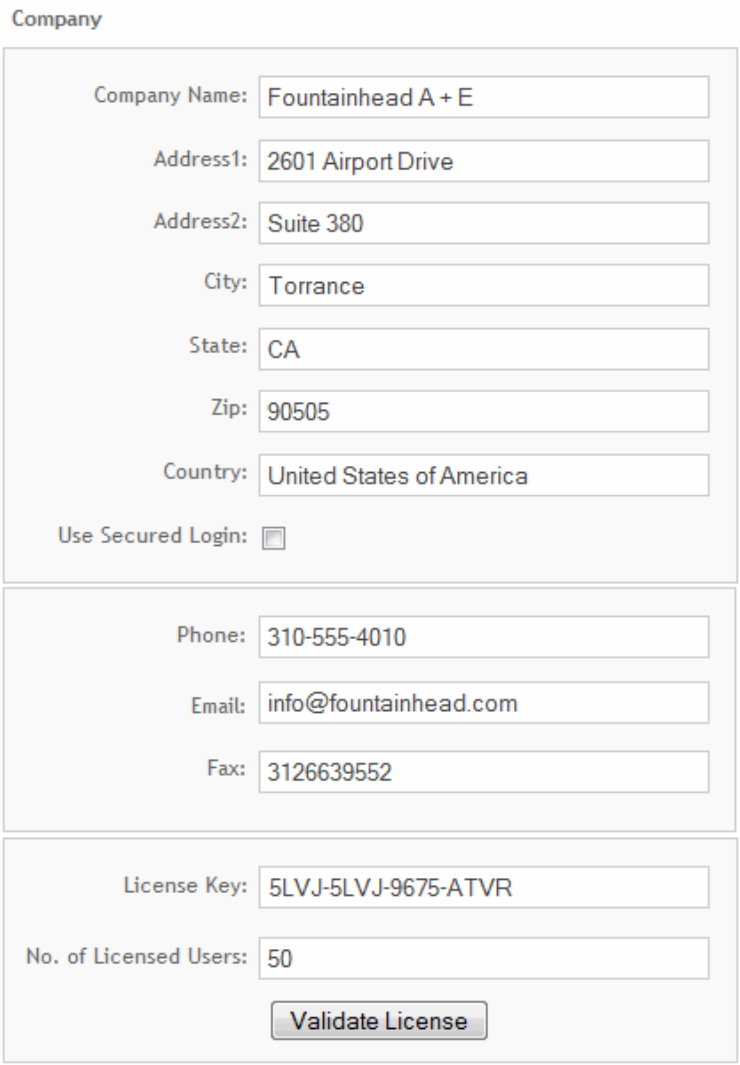
System • Company • Report Logos • Invoice Logos • Defaults • Formats • Print Setup • Email Settings • Password Policy	RFP • Defaults • Milestones • Teams • Phases/Job Codes • Tasks
Work Groups • Security • Reports	Documents • Template • Types • Paths
Users • Defaults • Formats • Details • HR • Time/Expense • Sync • Other Options • Security • Reports • Performance	Billing • Defaults • Billing Codes • Tax • Labels • Integration
Contact • Defaults • Formats	Custom • Reports • Invoices
Project • Defaults • Roles • Submittals • SF330 • Milestones • Teams • Phases/Job Codes • Tasks • Miscellaneous	Web Access
	Utilities

System

Reference

PREFERENCES - SYSTEM - COMPANY

The Company screen is used to create a profile of your business and to enter and validate your license information. You can modify any information – except for the company name and license keys. Changing the company name or a key will make your company database inaccessible.



Company Name:
The company name is a required field for maintaining a licensed ArchiOffice database. The field size cannot exceed 50 characters. Your ArchiOffice license key is based on your company name.

Address 1 and 2:
The company street or mailing address, these fields will appear on all invoices and statements.

City:
The company's city, this field will appear on all invoices and statements.

State:
The name of the state or province where the company is located. This field will appear on all invoices and statements.

Zip Code:
The zip or postal code of the area where the company is located. This field will appear on all invoices and statements.

Country:
The name of the country or region where the company is established.

Use Secured Login:
Select this check box to prevent the User IDs from displaying when the ArchiOffice login page displays. This increases security by preventing part of a user's login credentials from automatically displaying.

Phone:
The company's phone number. This field will appear on all invoices and statements.

Email:
The company's email address.

Fax:
The company's fax number.

License Key:
The license key that you have purchased for your company.

No. of Licensed Users:
The number of authorized and licensed users that you have purchased with the license key.

Validate License:
Click the button to verify, validate and save the purchased license.

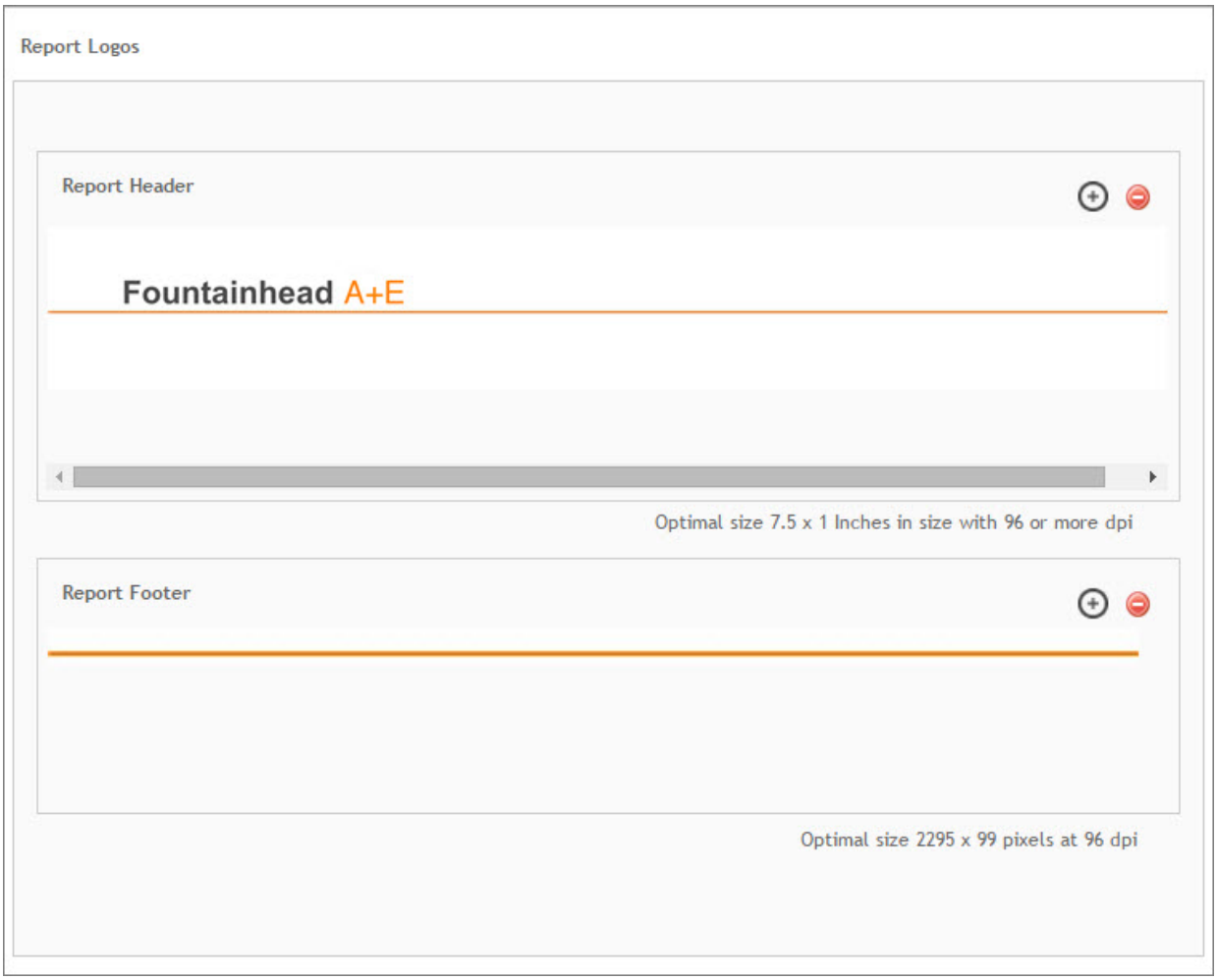
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - SYSTEM - REPORT LOGOS

Use the settings in this screen to change the way your reports look. Here you can specify the custom header and footer based on your company preferences.



Report Header:
For report header, select an image by clicking **Add** ⊕. Your image should be 7.5 x 1 inches with 96 or more dpi in jpg format.

Report Footer:
For report footer, select an image by clicking **Add** ⊕. Your image should be 2295 x 99 pixels at 96 dpi in JPG format.

Images must be saved using the RGB color palette.

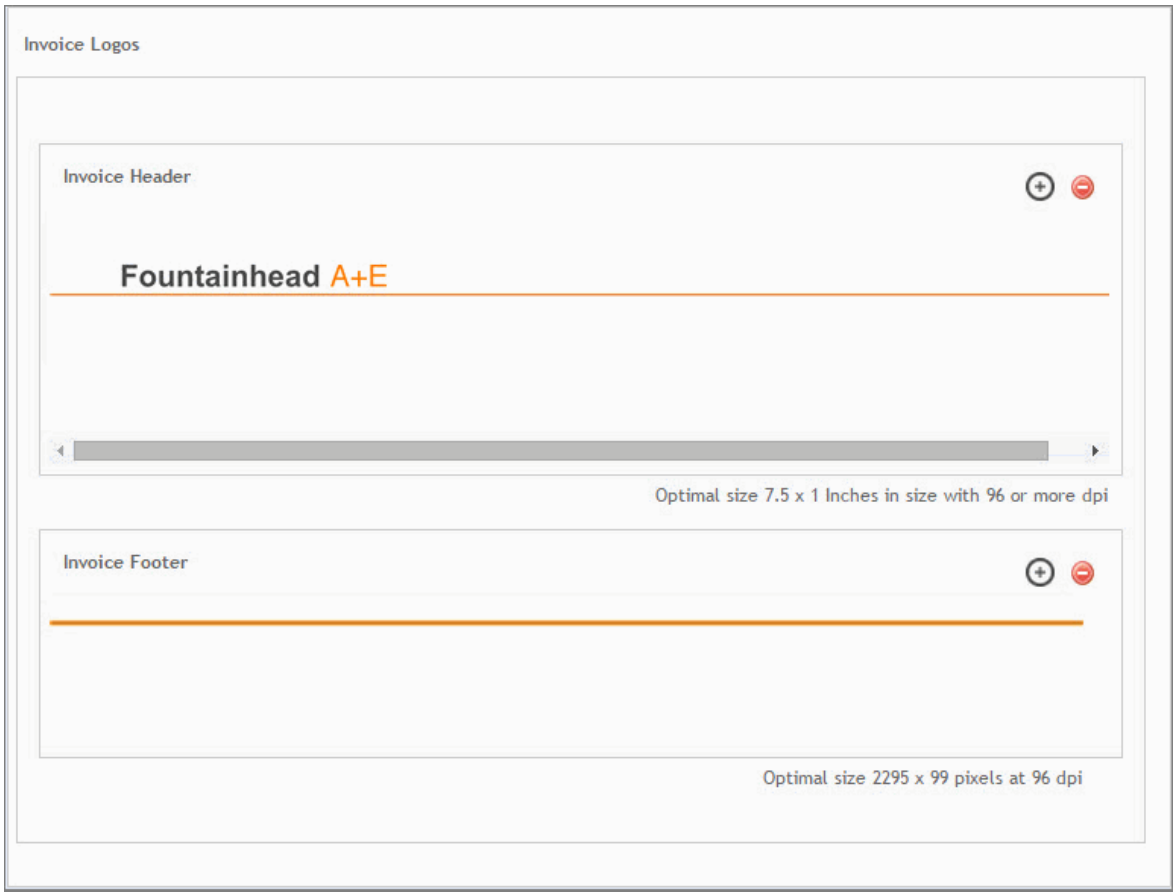
Delete ⊖:
Click **Delete** ⊖ to remove the image.

Button Panel

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - SYSTEM - INVOICE LOGOS

Use the settings in this screen to change the way your invoices look. Here you can specify a custom header and footer based on your company preferences.



Invoice Header:
For invoice header, select an image by clicking **Add** ⊕. Your image should be 7.5 x 1 inches with 96 or more dpi in JPG format.

Invoice Footer:
For invoice footer, select an image by clicking **Add** ⊕. Your image should be 2295 x 99 pixels at 96 dpi in JPG format.

Images must be saved using the RGB color palette.

Delete ⊖:
Click Delete ⊖ to remove the image.

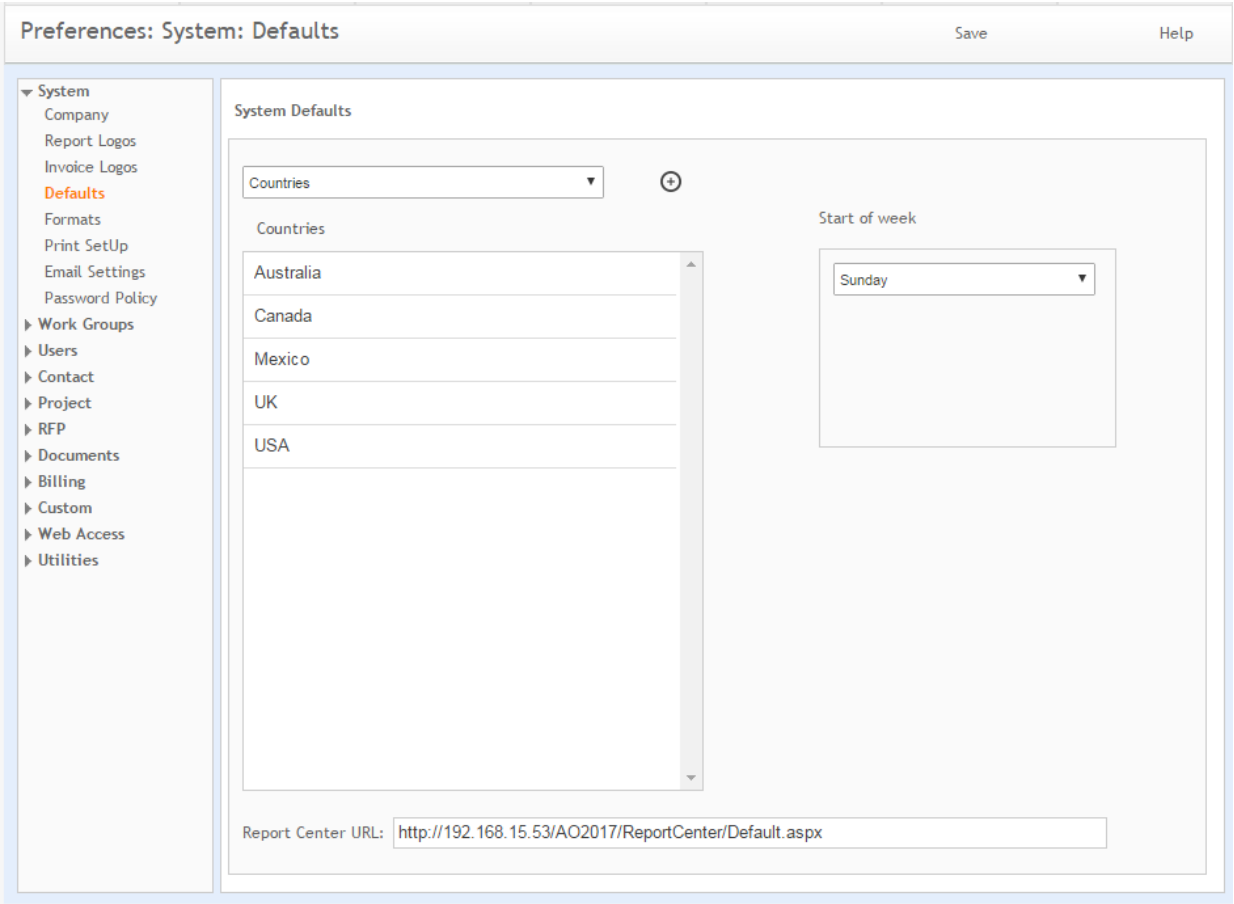
Button Panel

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - SYSTEM - DEFAULTS

Use the settings in this screen to set default values for the following:

- **Countries:** Name of countries or regions to be displayed in the relevant drop-down lists.
- **Phone Number Formats:** Format mask to be used for phone numbers (for example, international formats).
- **States:** Name of states or provinces to be displayed in the relevant drop-down lists.



Save and Add New ⊕:
To add a new default, click ⊕ and enter the text or value in the last blank row.

To edit a default, click its field to modify the information. To delete a default value, remove it from the row and click Save.

Start of week:
By default, your week starts on Sunday. However, you can control which day of the week is the start day for your firm by selecting the desired option from the drop-down. This setting affects the time entry, expense entry and related reports only.

Report Center URL:
ArchiOffice allows you to configure the report server URL. It allows you to install the report module on any server and configure the core application to point to that URL. This option helps in improving the performance of your application as the servers are separated for the report engine and other modules.

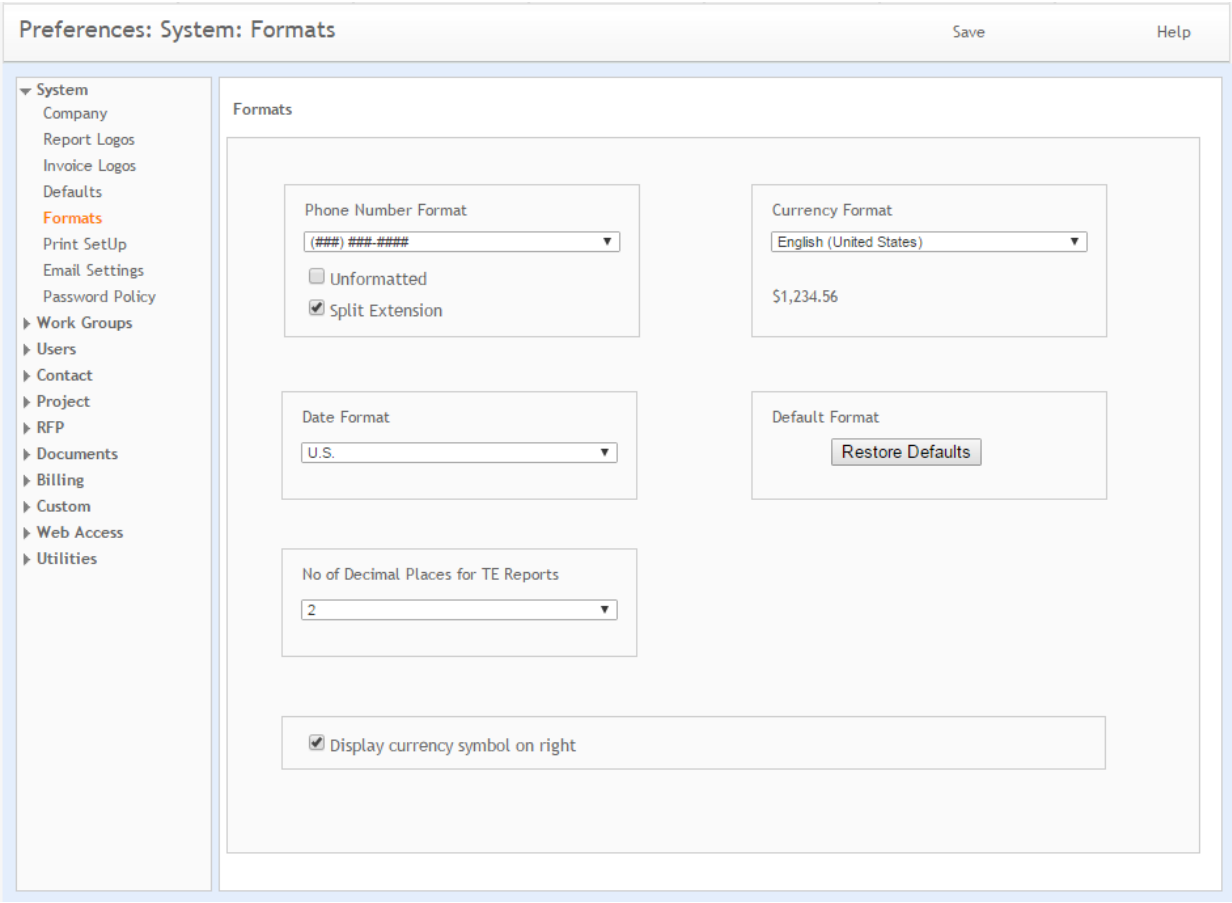
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - SYSTEM - FORMATS

Use the options on this screen to set the formats that should be used while entering data throughout ArchiOffice. You can set formats for phone numbers, currency and dates.



Formats

Phone Number Format:
Select the phone number format from this drop-down to be used in ArchiOffice by default. The options that display in this list are configured in System - Defaults preferences.

Unformatted:
Select this check box to allow users to enter a phone number without the system automatically applying the format selected in the *Phone number format* drop-down list. The number will display as entered.

If Split Extension is selected, this option is ignored.

Split Extension:
Select this check box to have the system automatically populate the phone extension field when a user enters a number longer than the phone number format currently selected in the *Format* drop-down list. For example, if the current phone number format is set to (###)###-#### and a user enters 8475555555252 and presses Enter or Tab; the first ten numbers are used as the main phone number (for example, 847-555-5555), the additional numbers (that is, 252) are entered in the extension field.

Date Format:
Select the date format to be used throughout ArchiOffice. You can choose the international format (Day/Month/Year) or US format (Month/Day/Year).

Currency Format
Select the currency format to be used. The drop-down lists the various currencies supported. The field below displays how the currency will display on various screens throughout ArchiOffice. Additionally the currency symbol for the selected country or region will translate to all invoices and reports.

Default Format:
Click the Restore Defaults button to reset all the format preferences to the original program settings.

No. of Decimal Places for TE Reports:
Select the number of decimal places to be displayed on all the time and expense reports. By default, the value is set to 2 but can be changed here.

Display Currency Symbol on Right:
Select this check box to set the currency symbols to the right. This option is unchecked by default.

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - SYSTEM - PRINT SETUP

Use the settings in this screen to set default print options for paper, labels and envelopes.

Standard Paper:
Select the standard paper size to be used for printing (that is, A4 or letter) from this drop-down list.

Standard Envelope:
Select the default envelope size to use for printing from this drop-down list.

Standard Label:
Select the default labels format to use when printing address labels.

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

How Do I

HOW DO I ENTER COMPANY DETAILS?

When setting up ArchiOffice, you must enter basic information on your company or firm. This information is used as the default for all outgoing communication and internal data records.

Do the following to enter company information:

1. Select Preferences from the *master* drop-down list.
2. Open the *System* folder and click **Company**.
3. Enter your firm's name, address, email and phone details.
4. Click **Save** to store your settings.

HOW DO I ADD REPORT AND INVOICE LOGOS?

You can set up your firm's logo to display on all ArchiOffice generated reports and invoices.

These logos will not affect the Microsoft Word document templates provided. You must edit the document templates using Word to make your changes, including the addition of logos.

Report Logos

Do the following to add Report logos:

1. Select Preferences from the *master* drop-down list.
2. Open the *System* folder and click Report Logos.
3. In the *Report Header* section, click **Add** and then browse to select the header logo.
4. In the *Report Footer* section, click **Add** and then browse to select the footer logo.

Click **Delete** to remove an image.

Invoice Logos

Do the following to add Invoice logos:

1. Select Preferences from the *master* drop-down list.
2. Open the *System* folder and click Invoice Logos.
3. In the *Invoice Header* section, click **Add** and then browse to select the header logo.
4. In the *Invoice Footer* section, click **Add** and then browse to select the footer logo.

Click **Delete** to remove an image.

HOW DO I DEFINE SYSTEM DEFAULTS?

The system administrator can specify the countries, phone numbers and states that are available for selection throughout ArchiOffice using its System-Defaults settings. You can also set the first day of the week for your company here.

The ArchiOffice administrator can set the format for all phone numbers entered in ArchiOffice (that is, Phone, Fax, Cellular and Pager numbers). These settings control how phone numbers are auto-formatted upon entry. For example, if you set the phone number format to ###.###.####, phone numbers entered in the system would be auto-formatted to display as follows: 123.456.7890.

Do the following to define system defaults:

1. Select Preferences from the *master* drop-down list.
2. Open the *System* folder and click **Defaults**.
3. Select a category from the drop-down list (for example, Countries or States).
4. Click the label for a listed item to edit it. To add a new label, enter a value or text in the last row and click **Save.**

HOW DO I SELECT SYSTEM FORMATS?

All phone, fax, cellular and pager numbers are displayed and printed according to your specifications, regardless of how you enter the information. You can also select the

formatting for the currency used in your region of the world (for example, USD, EUR, GBP, etc.).

The available formats are defined in the Preferences -System Defaults screen.

Do the following to set ArchiOffice system format defaults:

1. Select **Preferences** from the *master* drop-down list.
2. Open the *System* folder and click **Formats**.
3. In the *Phone number format* section, select the default format for phone numbers from the drop-down list.
4. Do one of the following:
    - Select the **Split Extension** check box to have the system automatically populate the phone extension field when you enter a number over the amount of digits in the current phone number format.
    - Select the **Unformatted** check box to disable phone number auto-formatting upon entry.
5. In the *Currency Format* section, select the default currency to be used in ArchiOffice from the drop-down list.
6. In the *Date Format* section, select the date format to be used from the drop-down list.
7. Click **Save**.

HOW DO I SET UP DEFAULT PRINTER SETTINGS?

You can set up ArchiOffice to select certain paper, label or envelope sizes (for example, Letter vs. A4) by default when you are ready to print.

These are only default settings. You can select different options when printing.

Do the following to configure printer settings:

1. Select Preferences from the *master* drop-down list.
2. Open the *System* folder and click **Print Set Up**.
3. In the *Standard Paper* section, select either the Letter or A4 paper size from the drop-down list.
4. In the *Standard Label* section, select the default label size your location uses.
5. In the *Standard Envelope* section, select the standard envelope size for printing, depending on your region of the world.
6. Click **Save**.

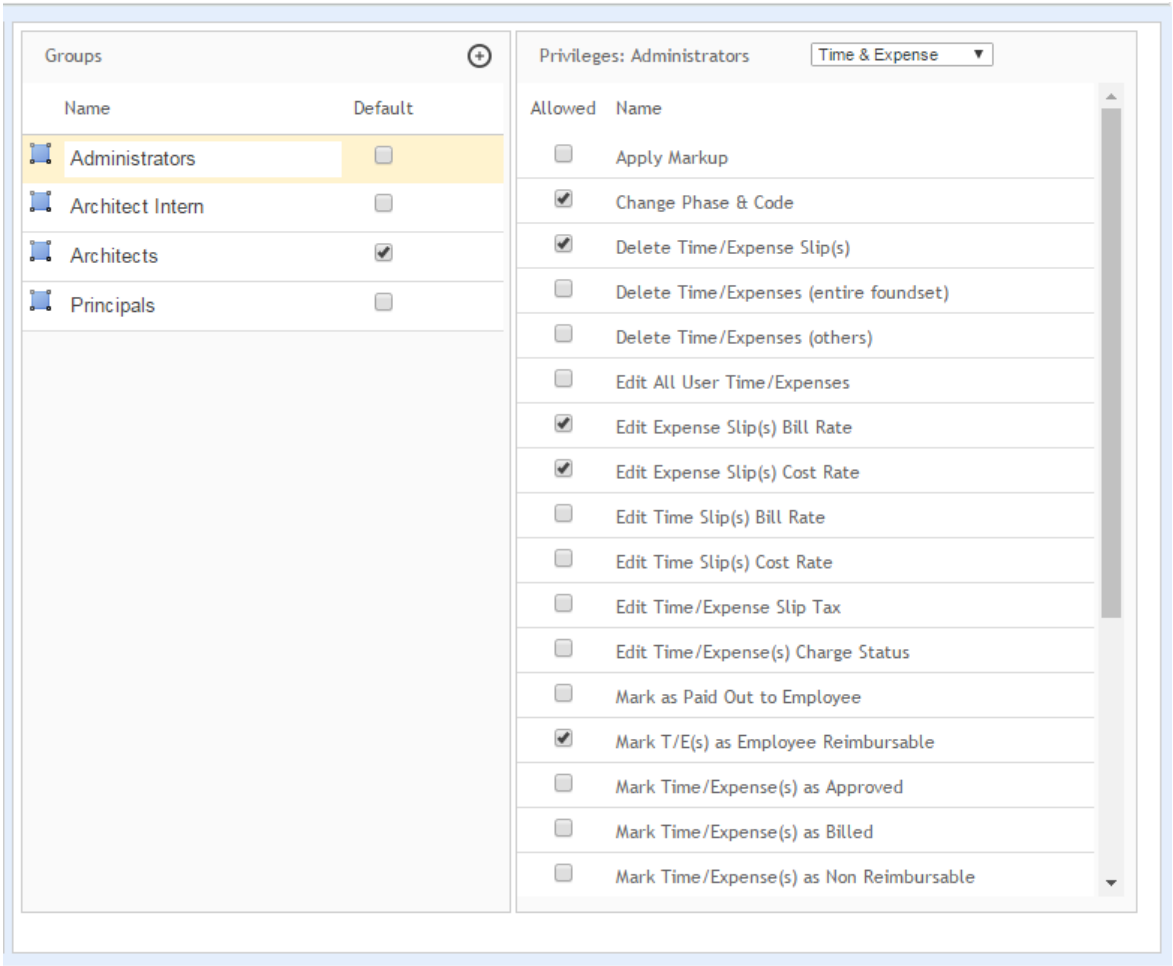
Work Groups

Reference

PREFERENCES - WORK GROUPS - SECURITY

Use the Work Groups - Security preferences to assign various security privileges to the selected work groups. When you log into ArchiOffice, what you see and what you can do is dictated by the settings defined here.

In a new installation, an administrative user has full access and all privileges are selected by default. All other users have no privileges until the Admin user changes their access settings. If upgrading from a previous version of ArchiOffice, all previously set security privileges will be maintained.



Groups

Save & Add New Record ⊕:
Click ⊕ to add additional work groups.

Select :
Click to select the group whose report access you want to change.

Name:
This column displays a list of existing work groups.

Default:
Select a check box in this column to specify the default work group to which new users will be added. You must have a default work group selected or you will not be able to create new users.

Delete ⊖:
Click ⊖ to delete a highlighted group.

Privileges

In the *Privileges* section, select a category from this drop-down list for which you would like to configure access settings (for example, Documents). Choosing a category displays the relevant privileges for the currently selected group.

Privileges:
This list displays the privileges for the selected category. Select or clear the check boxes for the displayed items to configure the privileges specific to the selected work group. Selecting a listed item grants the work group access to that feature, clearing the check box denies the work group that privilege.

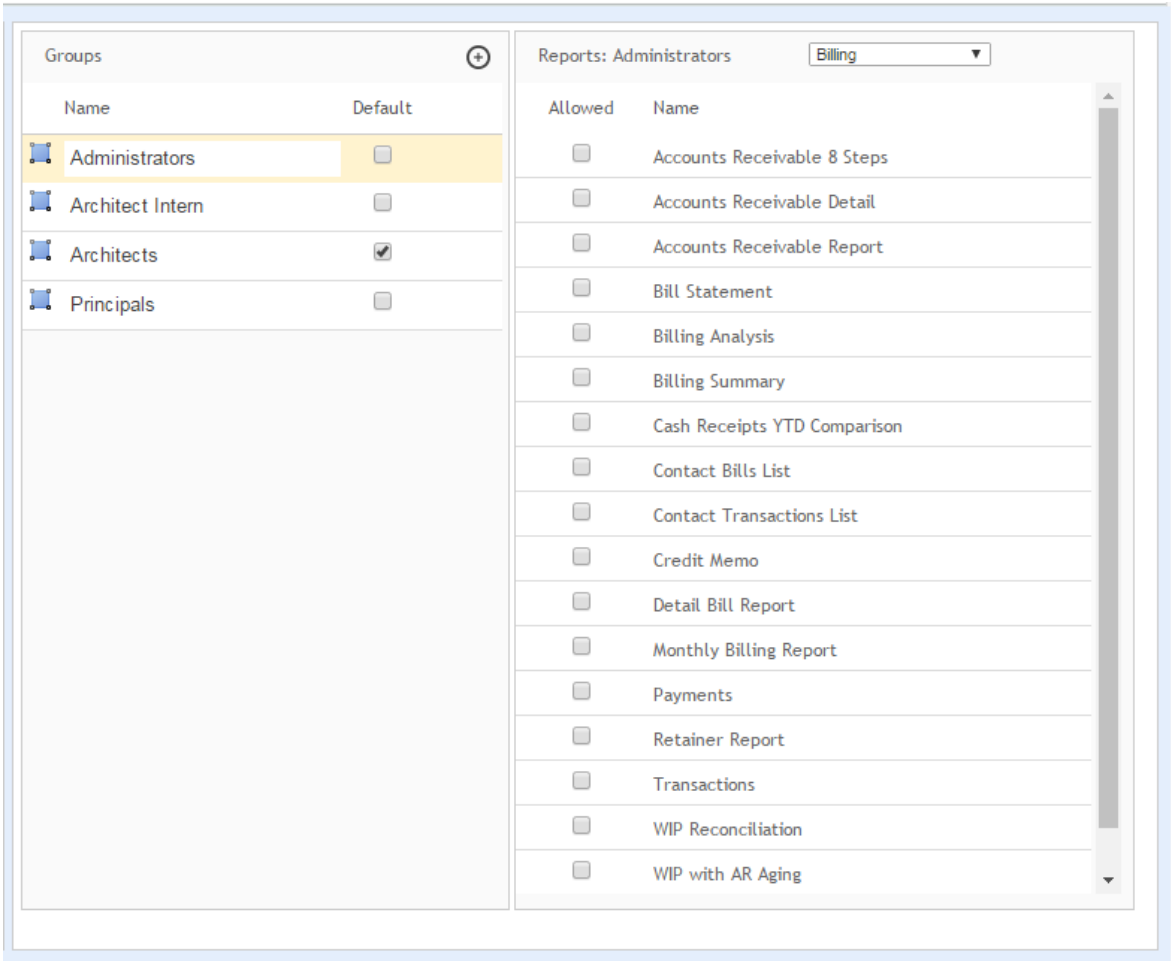
Button Panel

Save:
Click to save the security settings for the work groups.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - WORK GROUPS - REPORTS

The Preferences - Work Groups - Reports screen allows for various reporting privileges to be assigned for each workgroup. Selecting a check box grants the work group permission to access that report. Clear a check box to deny the work group access.



Groups

Select :
Click to select the group whose report access you want to change.

Name:
This column displays a list of existing work groups.

Default:
Select a check box in this column to specify the default work group to which new users will be added. You must have a default work group selected or you will not be able to create new users.

Delete :
Click to delete a highlighted group.

Reports

In the *Reports* section, select a module (for example, Contacts) from this drop-down list for which you want to configure report privileges. Choosing a module displays the relevant privileges for the currently selected work group.

Reports:
This list displays the report privileges for the selected module. Select or clear the check boxes for the displayed items to configure the privileges specific to the selected workgroup. Selecting a listed item grants the work group access that report.

Button Panel

Save:
Click to save the report settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

How Do I

HOW DO I SET UP SECURITY WORK GROUPS?

A work group is a predefined group of settings that can be applied to a group of users. For example, you can quickly apply access privileges that are appropriate for specific groups of users in your firm (for example, administrators, architects, project managers, etc.).

You can configure privileges for:

Privilege Categories		
Billing & Payments	Drawings	RFIs
Calendar	Notes	Submittals
Charts	Project Tasks	System
Contacts	Projects	Time & Expense
Documents	Reports	

Do the following to create a work group:

1. Select Preferences from the *master* drop-down list.
2. Open the *Work Groups* folder and click **Security**.
3. In the *Groups* section, click **Add** ⊕ to enter a group name.
4. If this will be the default group to which users are assigned, select the check box in the *Default* column by the group.

New users cannot be added unless one workgroup is designated as the default.

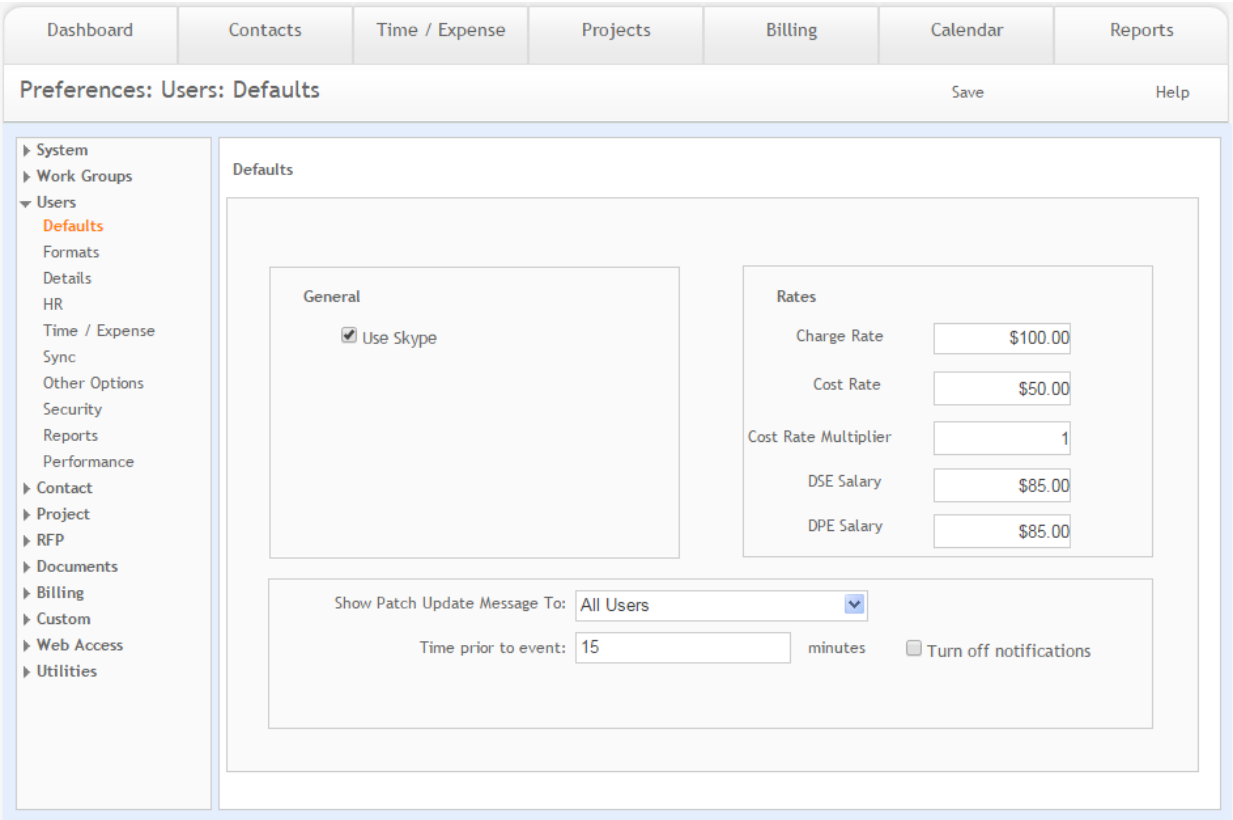
5. In the *Privileges* section, select a category from the drop-down list for which you would like to configure access settings (for example, Documents). Repeat this step to configure additional categories. Click **Save**.
6. In the *Preferences -Work Groups* folder, click **Reports**.
7. In the *Groups* section, click the group for which you want to configure report privileges.
8. In the *Reports* section, select a category from the drop-down list for which you would like to configure report access settings (for example, Contacts, Projects, etc.). Repeat this step to configure additional categories.

Users

Reference

PREFERENCES - USERS - DEFAULTS

The Users - Defaults preferences are used to set default values for new user accounts. Setting these values will save some entry when creating new users.



General

Use Skype:
Select this check box to use the *Skype* option in the Users - Other Options preferences for a new user.

Rates

Charge Rate:
Enter the value to use as the default billing rate for new employees. This value displays in the *Charge Rate* field in the Users - Time/Expense preferences for new users.

Cost Rate:
Enter the value to use as the default cost rate for new employees. This value displays in the *Cost Rate* field in the Users - Time/Expense preferences for new users.

Cost Rate Multiplier:
Enter the value to be used as the default cost rate multiplier for a new employee. This value displays in the *Cost Rate Multiplier* field on the Preferences > Users > Time/Expense screen for new users.

DPE Salary:
This value is the default DPE (Direct Personnel Expense) Salary rate for new employees. This value displays in the *DPE Salary* field in the Users - Time/Expense preferences for new users.

DSE Salary:
This value is the default DSE (Direct Salary Expense) Salary rate for new employees. This value displays in the *DSE Salary* field in the Users - Time/Expense preferences for new users.

Show Patch Update Message To:
Use this drop-down list to determine which users can view the update notifications that display on the ArchiOffice login page when an update is available. You can allow all users to see the notification or only selected users.

Time prior to event:
For the scheduled events, ArchiOffice can notify you about them in the form of alerts that appear at the bottom-right of the screen upon login. Here, you can set a fixed amount of time prior to an event that enables the system to pop up a reminder accordingly. By default, it is set to 15 minutes but can be changed.

Turn off notifications:
You can choose not to get notifications prior to the scheduled events by checking this option.

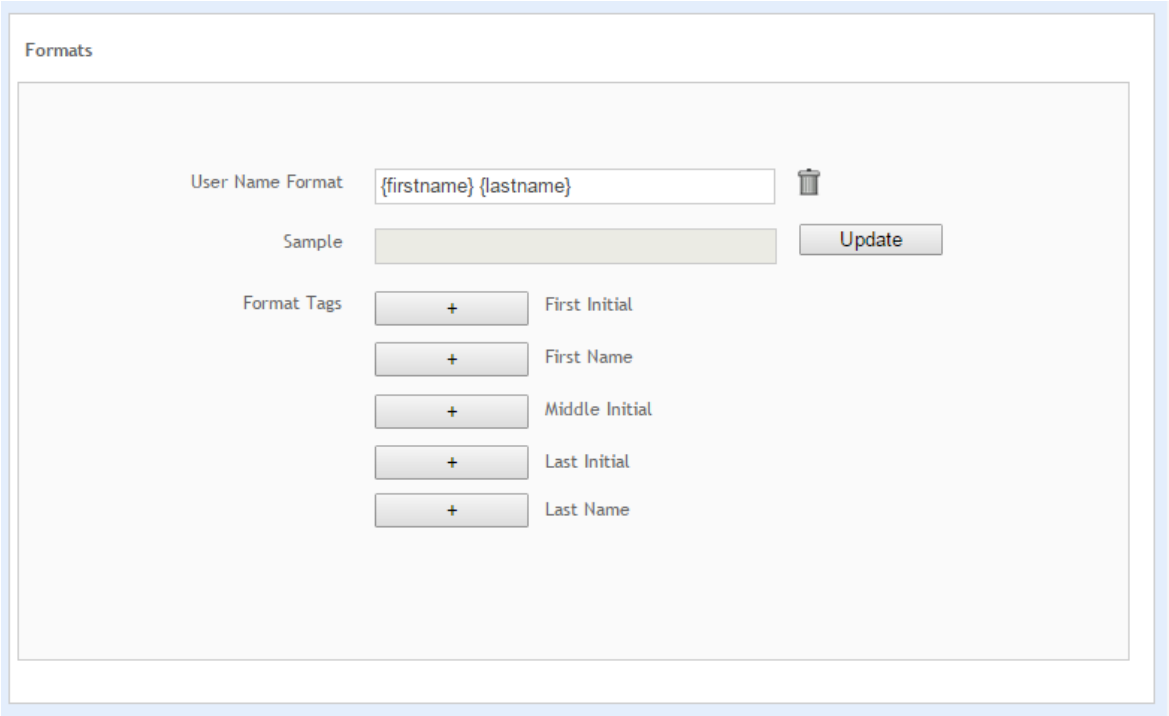
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - USERS - FORMATS

Use this layout to set the default format for new user accounts you will be creating in the system. This affects how user names are displayed throughout the various user preferences.



User Name Format:
Use this field to configure the format used for displaying user names in ArchiOffice. Use the Format Tags buttons to add the field names in the desired order. It is also permissible to type plain text into this field to add additional formatting.

Sample:
Displays how a user name displays based on the current format settings.

Update:
Click this button to apply the name format and update to all user names in ArchiOffice.

Format Tags:
These tags are used to construct the user name format. Click the **+** button by a tag to insert it into the User Name Format field.

Button Panel

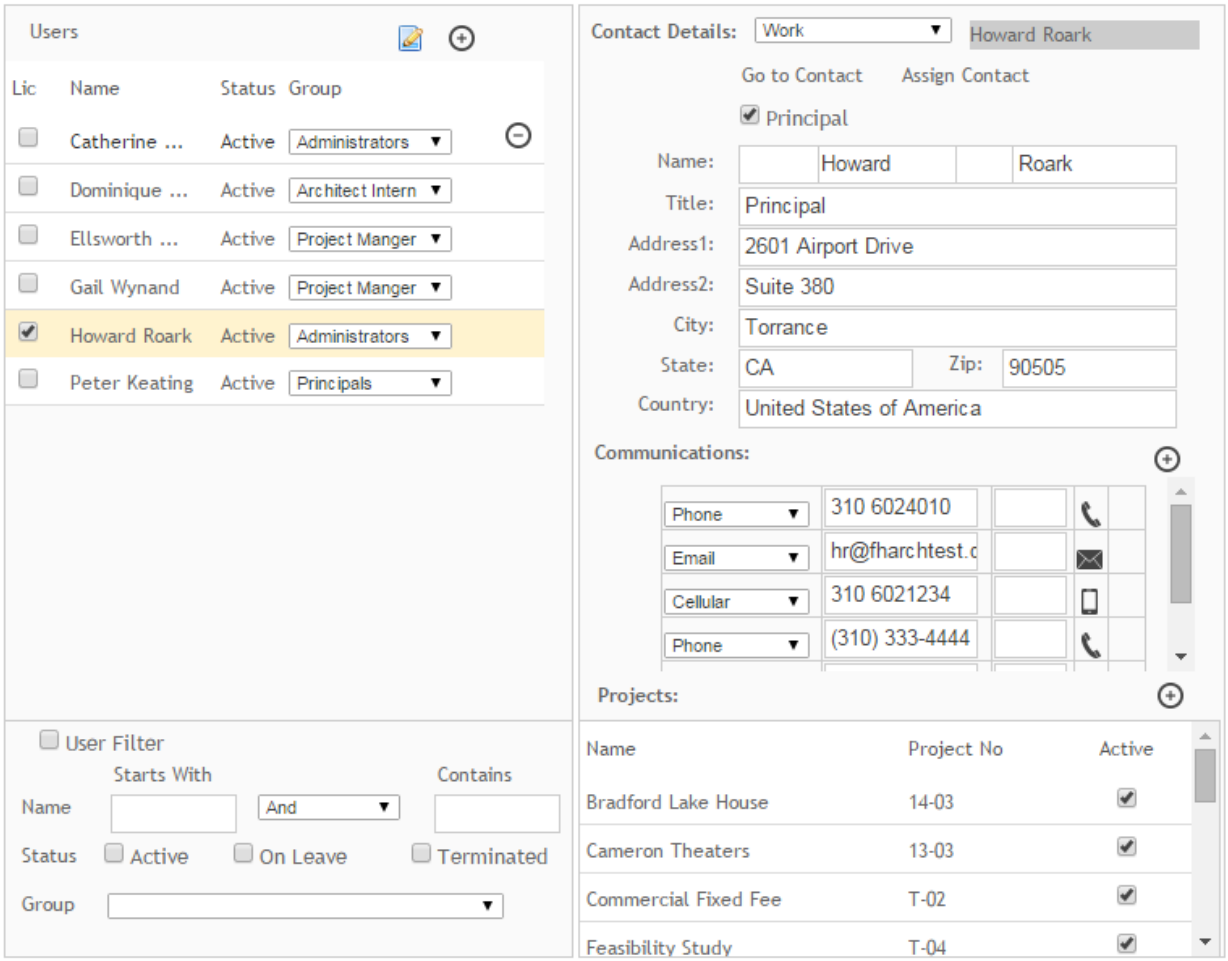
Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - USERS - DETAILS

The Users - Details preferences enable general account information to be entered for the selected user. This includes user name, title, address, city, state or province, country or region, etc.

Users



Go to Contact Record :
Click after a user has been added to go to the contact record for the selected user.

Add New User :
To add a new user account to the Users pane on the left, click . You will be prompted to enter the employee's User Name, Login Name, Password, and Initials. The administrator will then be able to enter user account details for this new user.

Lic:
Select this check box to assign one of the ArchiOffice licenses to the selected user.

Name:
This column displays the user names.

Status:
This column displays a user's status (for example, active, on leave, or terminated.). The status can be changed in the HR preferences.

Group:
Select a work group from this drop-down list to which you would like to assign a selected user. The user will inherit all the privileges of that workgroup.

Delete ⊖:
Click ⊖ to delete a user.

User Filter

To find a specific user of interest can be rather difficult by scrolling through the Users pane. The filter options provide a convenient method to limit quickly what users are being displayed in the Users list.

Name:
Use these options to search for users based on parts of their names.

Status:
Select one or more of these check boxes to filter the list by a user's status (that is, active, on leave and terminated).

Group:
Make a selection from this drop-down list to filter users by work group.

Contact Details

Contact Type:
Select the type of contact detail being entered from this drop-down list (that is, Home or Work).

User Name:
This read-only field displays the name of the user for which contact information is being added or edited.

Go to Contact:
Click this button to go to the user's employee contact record.

Assign Contact:
Click this button to assign a different contact record to this user.

Principal:
Select this check box to designate this user as a Principal architect.

Name:
Enter the user's name in these fields.

Title:
Enter a title for the user.

Address 1 and 2:
Enter the user's address detail in these fields.

> **City:**
> The city where the user is located.
>
> **State:**
> State or province where the user is located.
>
> **Zip:**
> The zip or postal code of the user.
>
> **Country:**
> The country or region where the state is located.

Communications

Specify the contact methods and detail for a user here. Communication methods include phone, email, pager, cellular, fax, Skype, and web.

Save & Add New ⊕:
Click ⊕ to add additional contact types and choosing a communication type from the drop-down list.

Delete ⊖:
Click ⊖ to remove a communication type from the list.

Projects

Use this option to assign projects to a selected user.

Add New Item ⊕:
Click ⊕ to select a project to be assigned to a user. You can select a specific project, project type (that is, Billable, Internal and RFP) or project status (Active, Inactive, Cancelled, etc.) and assign it to the selected user. When you are assigned to a project type, say billing, you get added to all the billing projects. Likewise, when you are assigned to a project status, say active, you are added to all the active projects.

Project Name/ No.
This displays the name and number of a project assigned to the selected user.

Active:
Select this check box to add the project to the user's My List.

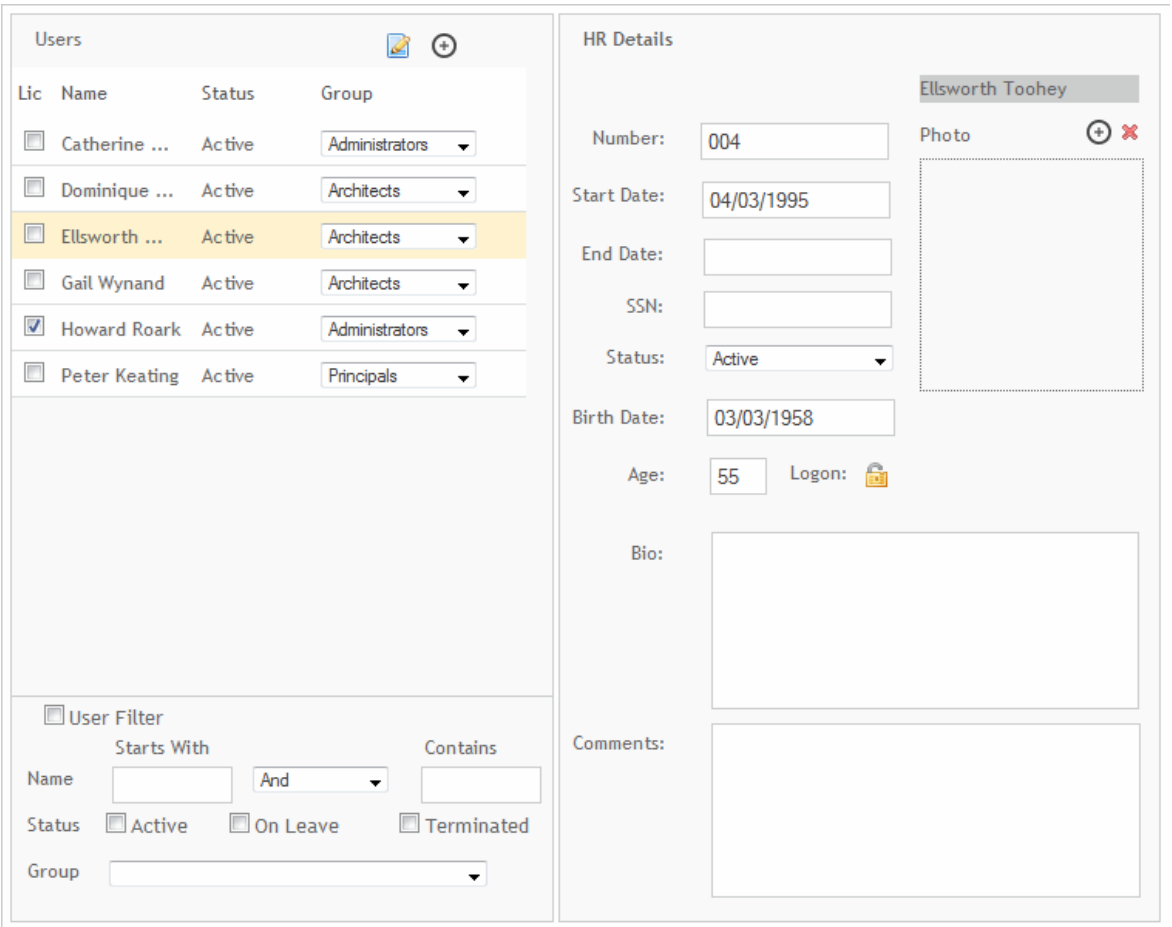
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - USERS - HR

The Users - HR preferences are used to enter human resource related detail for users. You can enter information such as an employee ID number, employee start and end date and working status. In addition, a photo and short biography can be added.



Users

Go to Contact Record :
Click to go to the contact record for the selected user.

Add New User ⊕:
Click ⊕ to add a new user account. You will be prompted to enter the person's user name, login name, password, and initials. The administrator will then be able to enter user account details for this new user.

Lic:
Select this check box to assign a license to the selected user.

Name
This column displays the user names.

Status
This column displays a user's status (for example, active, on leave, or terminated).

Group
Select a work group from this drop-down list to which you would like to assign a selected user. The user will inherit all the privileges of that work group.

Delete ⊖:
Click ⊖ to delete a user.

User Filter

The User Filter options provide a convenient method to limit quickly what users are being displayed in the Users list.

Name:
Use these options to search for users based on parts of their names.

Status:
Select one or more of these check boxes to filter the list by a user's status (that is, active, on leave and terminated).

Group:
Make a selection from this drop-down list to filter users by work group.

HR Details

Number:
Enter the user's employee number. If this field is left blank, a number will automatically be assigned.

Start Date:
Enter the user's hire date.

End Date:
Enter the user's termination date.

SSN:
Enter the social security number of the user.

Status:
Select the user's current work status from this drop-down list (that is, Active, On Leave Or Terminated).

> All the associated projects are marked inactive when you mark an employee's status as Terminated. You can make an employee and its associated projects active again at any time.

Birth Date:
Enter the birth date of the user. Select the birthdate from the pop up calendar.

Age:
Display user's age in years. Click the field label to get the age of the user in days.

Logon :
Click to view or edit a user's logon details. You can edit a user's logon, password, the initials displayed on reports, and assigned work group.

Photo:
Click **Add** to include a photo of the user. The optimum size of the photo must be 165 x 180. Click to delete it.

Bio:
Enter a biography of an employee.

Comments:
Enter additional comments about the user.

> Do not enter sensitive information in this field (for example, work performance, reviews, etc.). Any user who has access to preferences can access these comments.

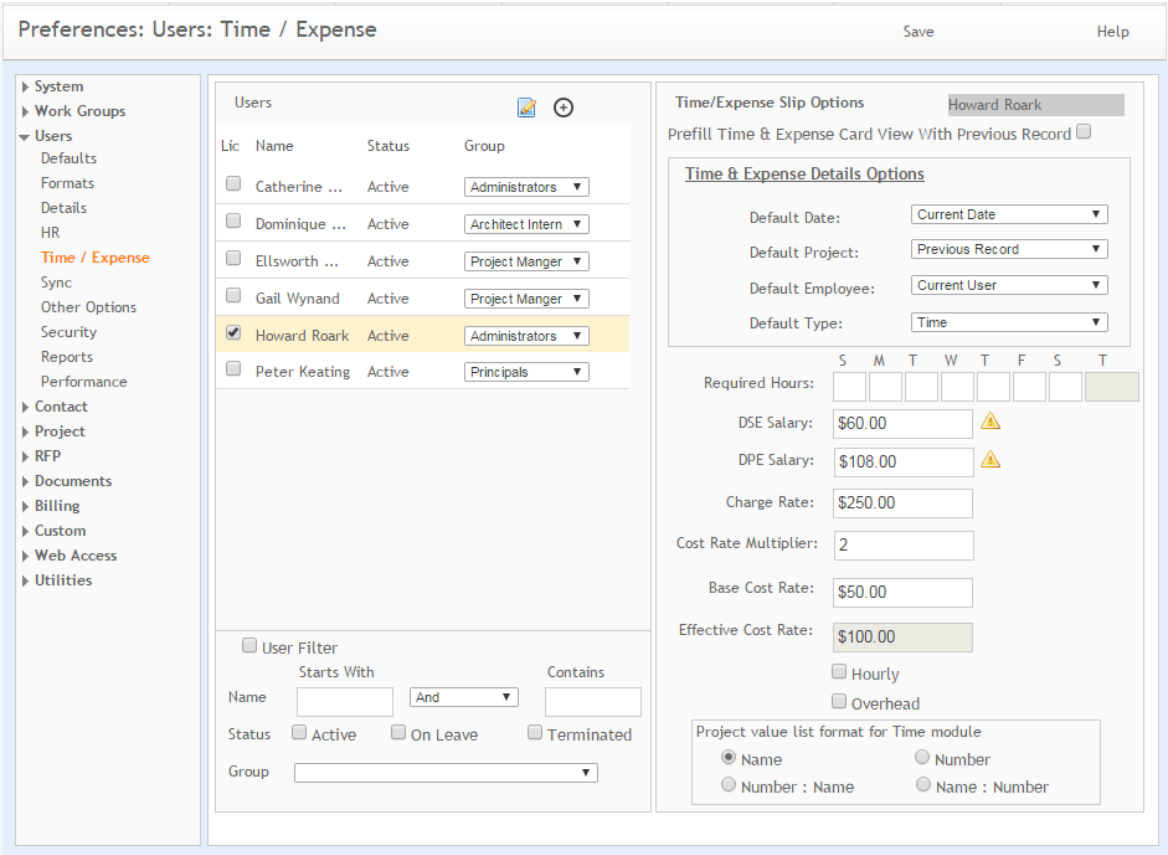
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - USERS - TIME/EXPENSE

The Users - Time/Expense preferences are used to configure default settings to be used when time and expense entries are created for a selected user. This includes hours to account for in a workweek, default billing rate, and fully loaded cost rate.



Users

Go to Contact Record :
Click to go to the contact record for the selected user.

Add New User :
To add a new user account to the Users pane on the left, click . You will be prompted to enter the person's user name, login name, password, and initials. The administrator will then be able to enter user account details for this new user.

Lic:
Select this check box to assign one of the ArchiOffice user licenses to a selected user.

Name:
This column displays the user names.

Status:
This column displays a user's status (for example, active, on leave, or terminated.).

Group:
Select a work group from this drop-down list to which you would like to assign a selected user. The user will inherit all the privileges of that work group.

Delete ⊖:
Click ⊖ to delete a user.

User Filter

The User Filter options provide a convenient method to limit what users are being displayed in the Users list.

Name:
Use these options to search for users based on parts of their names.

Status:
Select one or more of these check boxes to filter the list by a user's status (that is, active, on leave and terminated).

Group:
Make a selection from this drop-down list to filter users by work group.

Time/Expense Slip Options

Each user can specify how the creation of time and expense entries should occur.

Prefill Time & Expense Card View with Previous Record:
When this check box is selected, the time and expense entry fields will be populated with the details selected for the previously added record. This expedites the time and expense entry process. This setting is user-specific.

Time and Expense Details Options

Default Date:
Select the default date to display when creating a time and expense entry from this drop-down list.

Default Project:
Select the default project to display when creating a time and expense entry from this drop-down list.

Default Employee:
Select the default employee to display when creating a time and expense entry from this drop-down list.

Default Type:
Select the default type (that is, Time or Expense) to display when creating a time and expense entry from this drop-down list.

Required Hours:
The daily number of hours the user must account for in the system. This value affects the calculations on the Time screen and the calculation of overtime hours on the payroll report.

DSE Salary:
Used mostly for federal contract work. Direct Salary Expense (DSE) is calculated by taking the salary of the employee and dividing by the hours they work in a year, to arrive at an hourly rate. Generally, only companies doing business with the United States Government use this field.

DPE Salary:
Used mostly for federal contract work. Direct Personnel Expense (DPE) is calculated by taking the salary of the employee, adding an overhead allocation, and dividing by the hours they work in a year, to arrive at an hourly rate. Generally, only companies doing business with the United States Government use this field.

Charge Rate:
The billing rate for an employee. When an employee is added as a team member to a project, this is the default rate that will be loaded when using the Team Update Rates option. This can be modified at the project level if this rate varies from project to project.

Cost Rate Multiplier:
This is a multiplier for Base Cost Rate to calculate the Effective Cost Rate of an employee.

This value overrides the default *Cost Rate Multiplier* on the Preferences > Users > Defaults screen. If no value is specified here, ArchiOffice then inherits the value from there only.

Base Cost Rate:
The basic cost rate per hour of an employee. This rate is multiplied by the Cost Rate Multiplier to calculate the Effective Cost Rate.

Effective Cost Rate:
The fully loaded hourly cost for the employee. This rate is used to calculate profitability on time entries the employee enters for projects. This rate should include their salary, plus benefits and overhead portion for the employee.

Hourly:
Designates the employee as an hourly employee instead of salaried.

Overhead:
Designates the employee as non-billable and an overhead employee.

Project value list format for Time module:
Select the format to use when listing projects in the Time/Expense screen drop-down and in your ArchiOffice Mobile app. The drop-down list will display projects by name, project number or both - in either order - based on the option selected here.

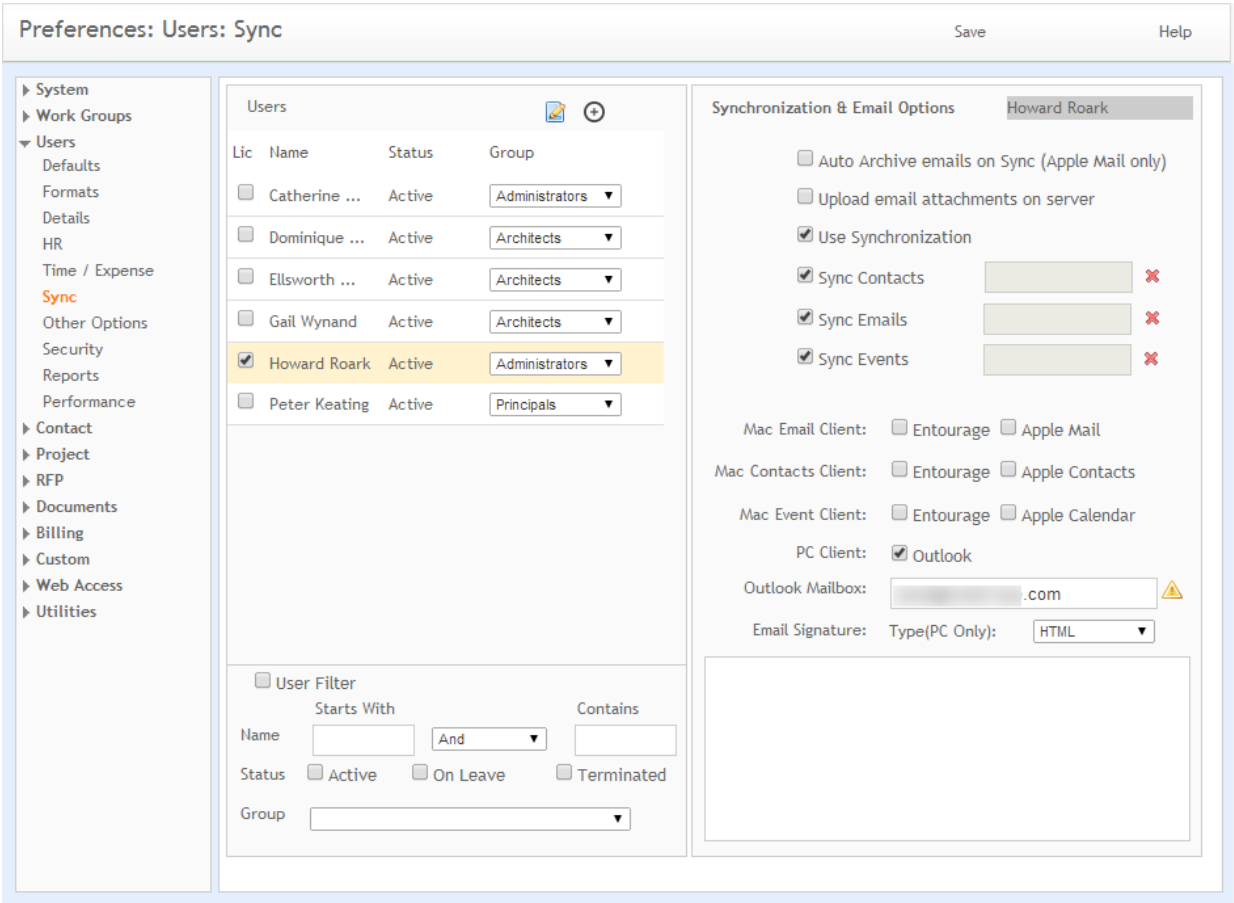
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - USERS - SYNC

ArchiOffice offers synchronization with Microsoft Outlook, Microsoft Entourage, Apple Mail (or AppleMail), Apple Contacts (or Address Book) and Apple Calendar (or iCal). Use the synchronization preferences on this screen to set each Mac or Windows program configurations for the selected user. For more on data synchronization with Apple products, read the whitepaper.



Users

Go to Contact Record :
Click to go to the contact record for the selected user.

Add New User :
To add a new user account to the Users pane on the left, click . You will be prompted to enter the person's user name, login name, password, and initials. The administrator will then be able to enter user account details for this new user.

Lic:
Select this check box to assign one of the ArchiOffice user licenses to a selected user.

Name:
This column displays the user names.

Status:
This column displays a user's status (for example, active, on leave, or terminated.).

Group:
Select a work group from this drop-down list to which you would like to assign a selected user. The user will inherit all the privileges of that work group.

Delete ⊖:
Click ⊖ to delete a user. You can see this after selecting or hovering over the user row.

User Filter

The User Filter options provide a convenient method to limit what users are being displayed in the Users list.

Name:
Use these options to search for users based on parts of their names.

Status:
Select one or more of these check boxes to filter the list by a user's status (that is, active, on leave and terminated).

Group:
Make a selection from this drop-down list to filter users by work group.

Synchronization & Email Options

Auto Archive emails on Sync:
This option gives you the flexibility of auto archiving synced emails in the Mac email program (Apple Mail only). The synchronization tool will create a replica of the ArchiOffice folder (called ArchiOffice_Synced) and its sub-folders, and move all the synced emails to the respective mailboxes in the cloned hierarchy. When you sync 100 or more emails, those which have already been synced will get transferred from the main ArchiOffice folder to the archived email folder and the process of syncing will start from the newly added emails rather than all the emails from the start.

Upload email attachments on server:
When syncing emails into ArchiOffice, if this check box is selected, file attachments are added to the ArchiOffice document storage folder. If this check box is not checked, email attachments are not added.

Use Synchronization:
Select this check box if the user should be allowed to synchronize.

Sync Contacts/Emails/Events:
Select one or all of these check boxes to specify the default synchronization options for a selected user. For example, the user might not want to sync their contacts each time, as

these rarely change. When you sync emails, they sync against ArchiOffice contacts (both to and from), not just against the projects.

Users can change the default synchronization options each time they run the sync process. The synchronization dialog box gives them the ability to change their defaults for the current synchronization.

Clear:
A date and time stamp of the most recent synchronization process displays adjacent to each of these fields. Click to clear this detail.

Mac Email/Contacts/Event Client:
Mac users should have their preferred applications selected for each item type. For example, for events, the Mac user can choose either Entourage or Apple Calendar/iCal. There is no harm in changing your mind later and deciding that you want to begin using Apple Calendar instead of Entourage. However, all the events that were syncing with Entourage will now need to be synchronized with Apple Calendar.

Apple Calendar and Apple Contacts users should note the following:

- You can add an ArchiOffice contact to Apple Contacts; however, if you edit the contact in Apple Contacts, it will update ArchiOffice on the next synchronization. During this synchronization, the Salutation field is dropped (that is, in ArchiOffice it will now be blank). It does not matter if the change in Apple Contacts had anything to do with the Salutation field.
- If you create an event in ArchiOffice with a start time of 12:xx p.m. (that is, anytime from 12:00 p.m. to 12:59 p.m.) and send the event to Apple Calendar, the event is created in Apple Calendar. However, when you modify the event in Apple Calendar (for example, dragging it to a new day), it will update ArchiOffice on the next synchronization. During this synchronization, the start time in ArchiOffice is changed to 12:xx a.m., even though the start time is still 12:xx p.m. in Apple Calendar.
- When you add an ArchiOffice contact to Apple Contacts, the field labels will be as follows: *Work* for the top three phone numbers, *Email 1 - 3* for the top 3 email fields, *Work Fax* for the fax number, *Mobile* for the cellular number, and *HomePage* for the URL or web address. Do not change these labels in Apple Contacts. If you do, the phone numbers in ArchiOffice will be deleted.

PC Client:
Select the Outlook check box to enable syncing with Microsoft Outlook.

Outlook Mailbox:
Windows users need to enter the name of their Mailbox into this field. This will either be called 'Personal Folders' or 'Mailbox - [Username]' if you are using an Exchange server. You need to spell it exactly as it appears in Outlook.

Email Signature:
You can also specify a default email signature for the user, so that new emails generated from ArchiOffice have a standard email signature added to it. You can specify the signature in either text or HTML format.

External applications (Microsoft Outlook/Entourage/Apple Mail) will not automatically add your standard signature to new emails created programmatically. You could just use the Insert Signature feature in your external program, but to add the signature automatically each time a new email is created, use this feature in ArchiOffice.

Type (PC Only):
Mac users can only specify a plain text email signature (Entourage and Apple Mail do not support an HTML email body to be added programmatically at this time), while a computer user can specify both a plain text as well as an HTML email signature.

Here is a useful trick for the computer user. Create a new email in Outlook and insert your favorite email signature into the new email. Next, right mouse-click and select *View Source*. Notepad will open displaying all the HTML code needed to create your email signature. Copy and paste this into the email signature field in ArchiOffice and select the HTML format.

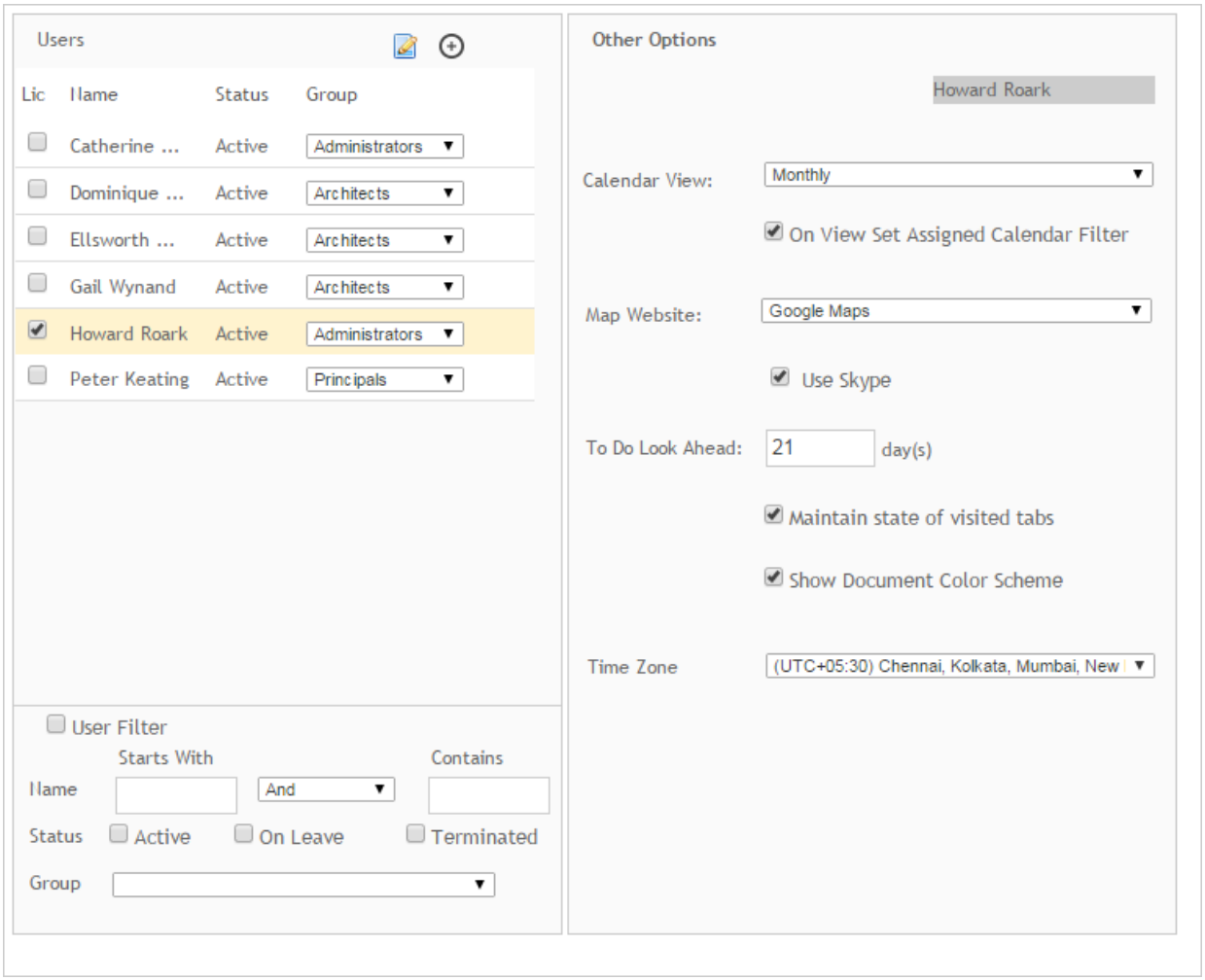
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - USERS - OTHER OPTIONS

The Users - Other Options preferences are used to set up miscellaneous settings such as the default view to display when a user accesses the Calendar module or what mapping service (that is, Google Maps, Yahoo Maps, etc.) is used when the user views the street map or driving directions for a contact's address.



Users

Go to Contact Record :
Click to go to the contact record for the selected user.

Add New User :
To add a new user account to the Users pane on the left, click . You will be prompted to enter the person's user name, login name, password, and initials. The administrator will then be able to enter user account details for this new user.

Lic:
Select this check box to assign a license to the selected user.

Name:
This column displays the user names.

Status:
This column displays a user's status (for example, active, on leave, or terminated.).

Group:
Select a work group from this drop-down list to which you would like to assign a selected user. The user will inherit all the privileges of that work group.

Delete :
Click to delete a user. You can view it only when you click or hover on a row.

User Filter

The User Filter options provide a convenient method to limit what users are being displayed in the Users list.

Name:
Use these options to search for users based on parts of their names.

Status:
Select one or more of these check boxes to filter the list by a user's status (that is, active, on leave and terminated).

Group:
Make a selection from this drop-down list to filter users by work group.

Other Options

Calendar View:
Select the default view for the Calendar when the user accesses that module.

On View Set Assigned Calendar Filter:
After the user views an Event (To-Do) assigned to them, the date will be recorded as the date the task was assigned to the user.

Map Website:
Select the preferred online map service (that is, Map Quest, Google Maps, and Yahoo Maps) to be used when viewing maps or driving directions from the Contacts screen. When is clicked, it will either map the main address of the contact or provide driving directions from your company address to their contact address. When either map or driving direction is clicked, your default internet browser opens and displays a map or driving directions using the mapping site configured here.

Use Skype:
Select this check box to allow a selected user to use Skype to communicate with a contact.

To Do Look Ahead:
Enter a number (for example, 14) so the To-Do items displayed on the Dashboard display all past due items as well as all items due on the current day and the upcoming days (for example, 14 days).

Maintain state of visited tabs:
When this check box is selected, ArchiOffice saves your settings on the visited screens. For example, when you navigate from a record in Contacts to another module (for

example, Reports) and return to the Contacts tab, the previously viewed contact record displays. It also saves other settings such as Output Format in reports, sort order of grids, state of search lists, invoice date range, last invoice date of projects, etc.

Time Zone:
Choose your time zone from the available options in the drop-down.

Show Document Color Scheme:
When selected, this option enables the color-coding for ArchiOffice documents. This feature is a smart color coding technique that allows you to know the status of documents from the color of their titles. There are three-color codes:

- **Red** color indicates that the document is stored in the database.
- **Black** color indicates that the document is stored both at the physical location and the database.
- **Green** color indicates that the document is stored only at the physical location.

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - USERS - SECURITY

When you log into ArchiOffice, what you see and are able to do is dictated by your security settings. The privileges set here take precedence over the security settings of the work group to which a user is assigned.

In new installations, Admin user accounts have all settings checked and regular user accounts have all settings unchecked by default. If upgrading from a previous version of ArchiOffice, all previously set security privileges will be maintained.

Users

Go to Contact Record :
Click to go to the contact record for the selected user.

Add New User :
To add a new user account to the Users pane on the left, click . You will be prompted to enter the person's user name, login name, password, and initials. The administrator will then be able to enter user account details for this new user. You can enter up to 50 characters for user names and passwords.

Lic:
Select this check box to assign a license to the selected user.

Name:
This column displays the user names.

Status:
This column displays a user's status (for example, active, on leave, or terminated.).

Group:
Select a work group from this drop-down list to which you would like to assign a selected user. The user will inherit all the privileges of that work group.

Delete :
Click to delete a user.

User Filter

The User Filter options provide a convenient method to limit what users are being displayed in the Users list.

Name:
Use these options to search for users based on parts of their names.

Status:
Select one or more of these check boxes to filter the list by a user's status (that is, active, on leave and terminated).

Group:
Make a selection from this drop-down list to filter users by work group.

Privileges

Reset Password:
Click to reset the selected user's password.

Change User Login Name:
Click to change the employee's user name. You can enter up to 50 characters for user names.

Categories:
Select a category from this drop-down list for which you would like to configure privileges (for example, Documents). Choosing a category displays the relevant privileges for the currently selected user.

Privileges:
This list displays the privileges for the selected category. Select or clear the check boxes for the displayed items to configure the privileges specific to the selected user. Selecting a listed item's check box grants the user access to that feature, clearing it denies the user that privilege.

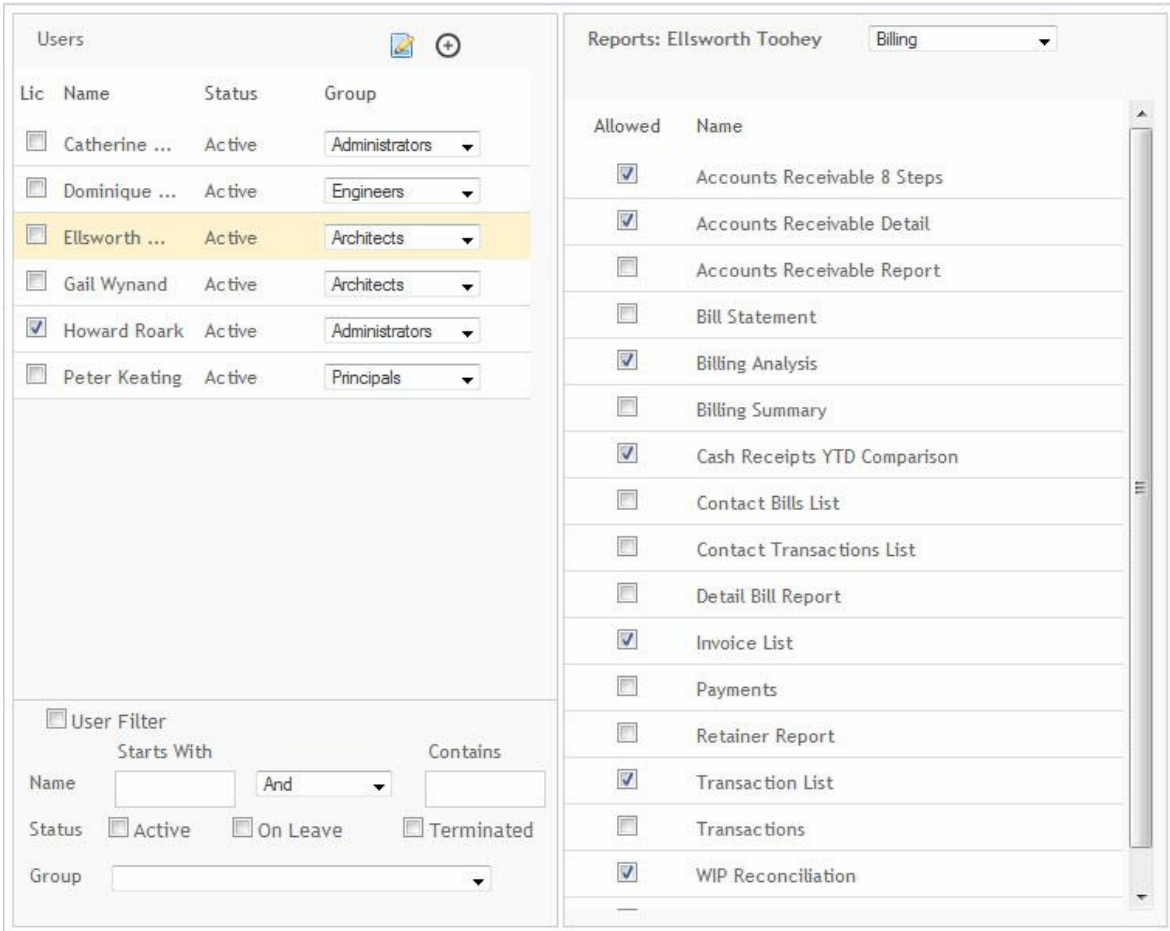
Button Panel

Save:
Click to save the user security settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - USERS - REPORTS

The Users - Reports preferences are used to set access privileges to specific reports for a selected user. The privileges set here take precedence over the reports settings of the work group to which a user is assigned.



Users

Go to Contact Record :
Click to go to the contact record for the selected user.

Add New User ⊕:
To add a new user account to the Users pane on the left, click ⊕. You will be prompted to enter the person's user name, login name, password, and initials. The administrator will then be able to enter user account details for this new user.

Lic:
Select this check box to assign a license to the selected user.

Name:
This column displays the user names.

Status:
This column displays a user's status (for example, active, on leave, or terminated.).

Group:
Select a work group from this drop-down list to which you would like to assign a selected user. The user will inherit all the privileges of that work group.

Delete ⊖:
Click ⊖ to delete a user.

User Filter

The User Filter options provide a convenient method to limit what users are being displayed in the Users list.

Name:
Use these options to search for users based on parts of their names.

Status:
Select one or more of these check boxes to filter the list by a user's status (that is, active, on leave and terminated).

Group:
Make a selection from this drop-down list to filter users by work group.

Reports

Modules:
In the *Reports* section, select a module (for example, Contacts) from this drop-down list for which you would like to configure report privileges. Choosing a module displays the relevant privileges for the currently selected user.

Privileges List:
This list displays the report privileges for the selected module. Select or clear the check boxes for the displayed items to configure the privileges specific to the selected user. Selecting a listed item grants the user access to that report, clearing the check box denies the user that privilege.

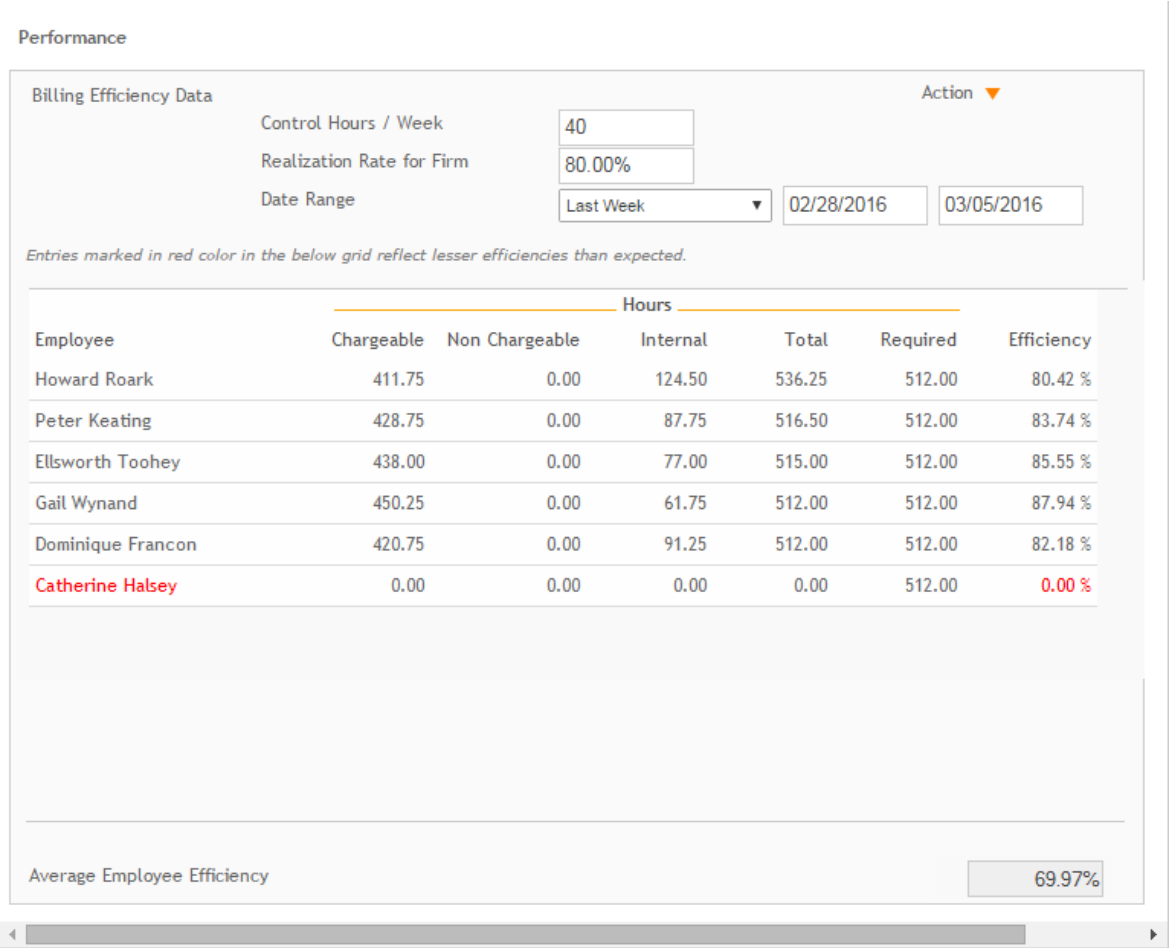
Button Panel

Save:
Click to save the report preferences.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - USERS - PERFORMANCE

Performance data enables administrators to measure the employees billing efficiency. This screen shows each active and non-overhead employee's billable hours and efficiency for a specified date range. This is compared to the *Control Hours/Week* and *Efficiency Threshold for Firm*. You can have employees whose efficiency can be less due to greater administrative responsibilities.



Control Hours / Week:
Enter the typical number of hours your employees work per week.

Realization Rate for Firm:
Enter your minimum efficiency percentage goal. Your efficiency is the ratio of recorded billable hours to required hours.

Date Range:
Specify the date range for which you want to view billing efficiency data.

Grid:
This grid displays the chargeable, non-chargeable, internal, total and required hours for listed employees for the specified date range. It also displays their efficiency percentage. Employees with efficiency percentages that fall short of the value in the *Efficiency Threshold for Firm* field display in red.

Click a grid a column header to sort the information by the content in that column.

Action

Refresh:
Select this option to update the grid data after updating the control hours, efficiency threshold or data range values.

Print:
Select this option to print the displayed billing efficiency data.

Average Employee Efficiency:
This read-only field displays the average efficiency ratio for your firm's employees.

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

How Do I

HOW DO I ADD USERS?

Do the following to create a new user account:

1. Select Preferences from the master drop-down list.
2. Open the *Users* folder and click **Details**.
3. Click **Add** in the *Users* section.
4. Enter the following information when prompted: user name, login name, password and initials.
5. New users are automatically assigned to the default work group. To assign a user to a different group, select a work group from the *Group* drop-down list to which to assign the user. The user will inherit all the privileges of the selected work group.
6. In the *Contact Details* section, if this user is a Principal architect, select the **Principal** check box.

7. Edit your contact information, as needed. Your work address displays by default. It displays your firm's address. Select **Home** from the drop-down list to enter your residential address.
8. Enter your contact information in the *Communications* section.
9. Click **Add** in the *Projects* section to assign this user to a project. You can specify the user's role and activity status.
10. Click **Save**.

You can also add users to a project team on the Projects-Details screen.

HOW DO I SET UP USER DEFAULTS?

An ArchiOffice administrative user can set up default options that displays automatically for users during data entry. For example, an administrative user can set up default charge rate, cost rate, projects, and default entry type and hours an employee must account for each week. These default settings expedite data entry and reduce errors when users enter information (for example, time and expense entries).

Several of these settings can be modified by users via the User Setup Area.

Do the following to configure default settings for new ArchiOffice users:

1. Select Preferences from the *master* drop-down list.
2. Open the *User* folder and click **Defaults**.
3. Enter rate values and click **Save**.
4. Click **Formats** in the *User* folder. Configure the default username format.
5. Click **Time/Expense** in the *User* folder. Select an employee in the *Users* section and configure the default time and expense entry options as instructed in Preferences -Users-Time/Expense.
6. Click **Sync** in the *User* folder. Select an employee in the *Users* section and configure the default synchronize and email options as instructed in Preferences -Users-Sync.
7. Click **Other Options** in the *User* folder. Select an employee in the *Users* section and configure the default Calendar View that displays for users, map site and Skype settings as instructed in Preferences -Users-Other Options.

Click Save to save your preferences for each screen.

HOW DO I ENTER EMPLOYEE HR DETAILS?

Apart from using ArchiOffice to manage projects, it can also be used to record details for Human Resources. An HR manager can enter employee details such as your employee number, start date with the firm and employment status. In addition, your photo and biography can be added. Your bio is used in generating project data and summary reports.

Do the following to enter or edit HR details:

1. Select Preferences from the *master* drop-down list.
2. Open the **Users** folder and click **HR**.
3. Select an employee from the *Users* list.
4. Enter the user's *Employee Number*.
5. Enter the employee's *Start* and *End* date.
6. Enter the *Social Security Number*.
7. Make a selection from the **Status** drop-down list (Active, On Leave or Terminated).
8. Enter a birth date.
9. Enter the age as per the birth date.
10. Click **Logon** to set the user's ArchiOffice logon information.
11. Click Add to include a photo for the user profile.
12. Enter biographical detail on the employee in the *Bio* field.
13. Enter notes or comments in the *Comments* field.

The birth date and photo can be modified by you via the User Setup Area. Users with privileges to access the Preferences area can read the text entered in the *Comments* field.

HR personnel should not use this field to enter performance reviews or any other sensitive information regarding employees.

HOW DO I CONFIGURE SECURITY PRIVILEGES?

When you log into ArchiOffice, what you can see and do is dictated by the privilege settings defined for you by the System Administrator. These security settings are user specific. They take precedence over the security settings of the workgroup to which a user is assigned.

Do the following to set a user's privileges:

1. Select Preferences from the *master* drop-down list.
2. Open the *Users* folder and click **Security**.
3. Select an employee from the *Users* list.
4. Select a category from the *Privileges* drop-down list.
5. Select a check box of an item in the list of privileges to grant a privilege. Clear a listed item's check box to remove that privilege for the selected user.
6. Repeat steps 4-5 as needed. Click **Save**.

HOW DO I CONFIGURE REPORT PRIVILEGES?

ArchiOffice provides the option to grant privileges to module specific reports for a selected user that take precedence over the reports settings of the workgroup to which a user is assigned.

Do the following to specify a user's report privileges:

1. Select Preferences from the *master* drop-down list.
2. Open the *Users* folder and click **Reports**.
3. Select an employee from the *Users* list.
4. Select a module (for example, Contacts or Projects) from the *Reports* drop-down list.
5. Select a check box of an item in the list of privileges to grant a privilege. Clear a listed item's check box to remove that privilege for the selected user.
6. Repeat steps 4-5 as needed. Click **Save**.

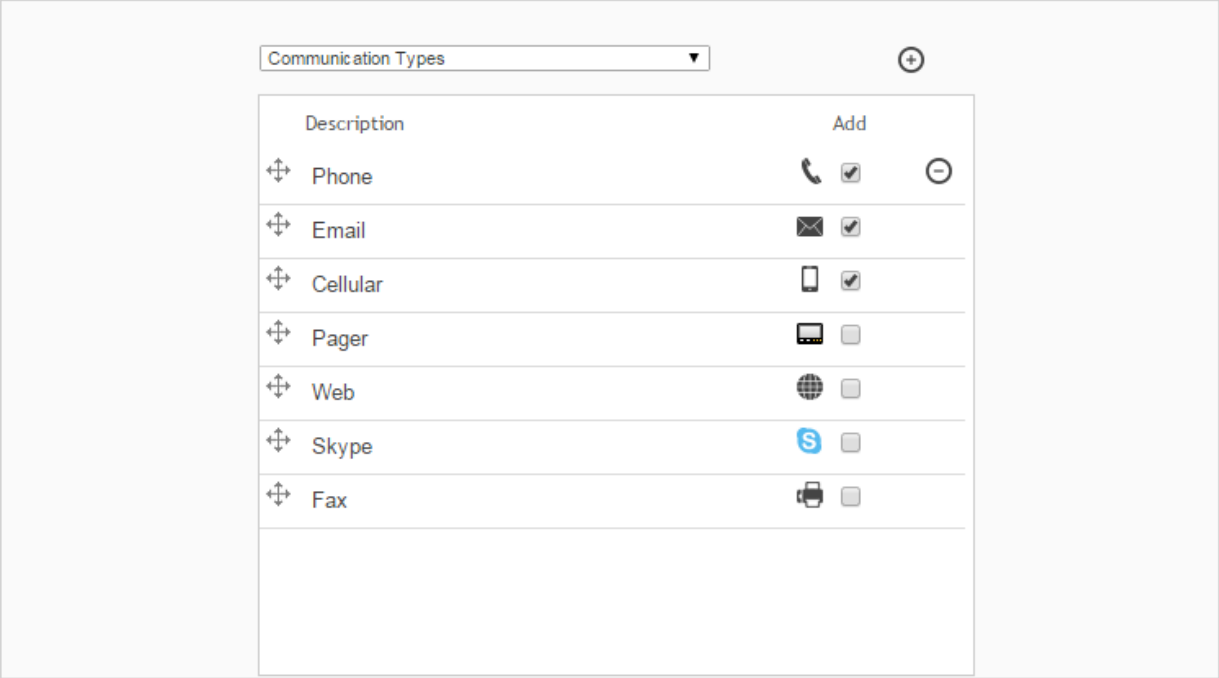
Contact

Reference

PREFERENCES-CONTACT-DEFAULTS

The Contact-Defaults in the Preferences screen are used to specify default settings for all new contacts added to your database. You can set the defaults for address types, communication types, contact types and salutation types, as well as project billing terms to apply to a client. In addition, you can add custom check boxes to apply to all contact records.

Contact Defaults



Defaults

Select one of the following from this drop-down list:

- **Address Types:** As address tabs are added by you in the Contacts Detail View, the tabs are labeled with the default names entered here. You can change the order of the default address type. First, click ✣ on the address type (for example,

Word) to be moved. Next, click on the address type (for example, Home) being repositioned.

ArchiOffice allows you to enter a maximum of six address types.

- **Communication Types**: Specifies the types of contact information available in a contact record. When adding a new communication type, hover the mouse to the left of the *Add* check box for the new item. Left-click when the pointer changes to a hand symbol. A list of icons will display. To change an icon for a communication type, click the icon and select a different one from the displayed list. You can change the default order of the communication type here. First, click on the type (for example, Email) to be moved. Next, click on the type (for example, Phone) being repositioned. The communication type can be reordered in the Contacts screen as well.

- **Contact Types:** Controls what options display in the *Type* drop-down list in the Contacts Detail View.
- **Custom Checkboxes:** Adds customized check boxes to the table in the Contacts Detail View, located below the *Type* field. These check boxes are provided as additional filter options for searching and reporting. Click Update to update all contact records with the custom check boxes.
- **Salutation Types:** Specifies the types of salutations you can choose for a new contact record in the Detail View.
- **Terms:** A list of all the available payment term choices displayed on the *Terms* fields found in the contact record and the Projects -Billing-Options. This list must be updated with all term options for invoices so the correct term option can be selected from the Billing-Default preferences.

Save & Add New :
Click to add additional items.

Description:
Hover your mouse near the description field to edit an existing description.

Delete :
To delete a listed item, hover the mouse pointer over it and click .

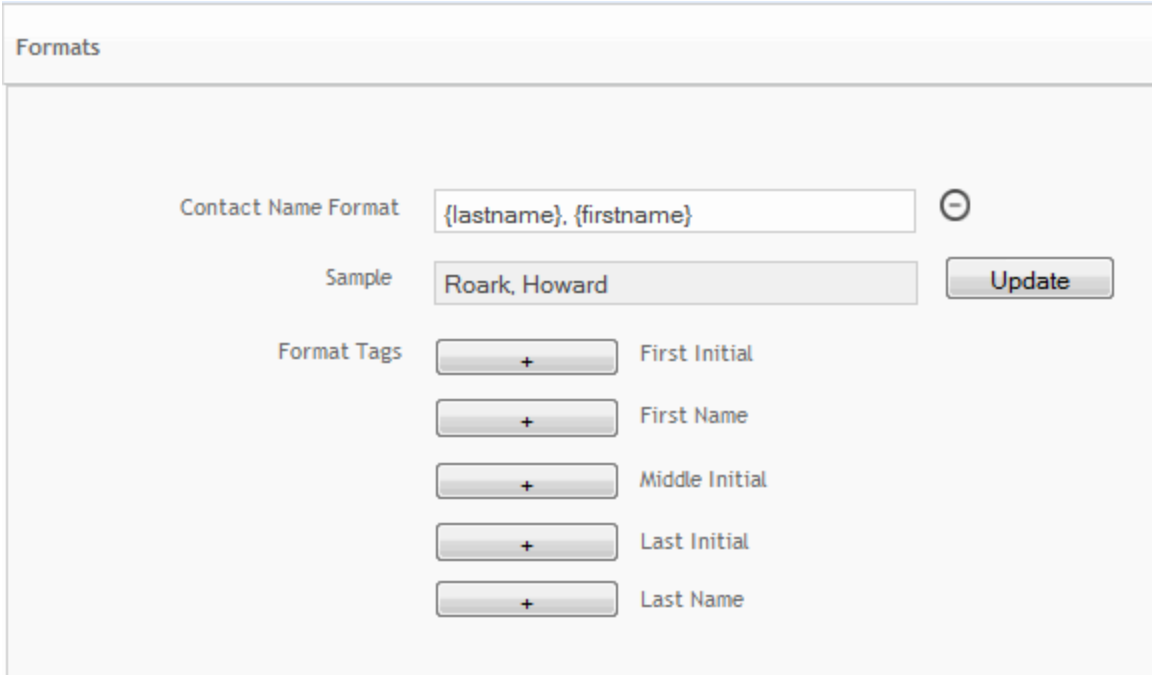
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES-CONTACT-FORMATS

Use this screen to set the default format for new contacts. This determines how user names are displayed on the Contacts List View.



Contact Name Format
Use this field to configure the format used for displaying contact names in ArchiOffice. Use the Format Tags buttons to add the field names in the desired order. It is also permissible to type text into this field to add additional formatting.

Sample
This field gives a preview of how a contact name will display with the current format settings.

Update
Click this button to apply the name format and update all contact names in ArchiOffice.

Format Tags
These tags are used to construct the contact name format. Click the **+** button by a tag to insert it into the Contact Name Format field.

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

How Do I

HOW DO I SET DEFAULTS FOR NEW CONTACTS?

The Preferences -Contact-Defaults screen is used to specify default settings for all new contacts. Use these preferences to set the default options and selections that display when a new contact record is created. You can set the defaults for address types, communication types, contact types and salutation types, as well as terms for any billing client. In addition, you can add custom check boxes to apply to all contact records.

You can also configure the default name format for new contacts. This controls how contact names display throughout the ArchiOffice system.

Do the following to set defaults for new contacts:

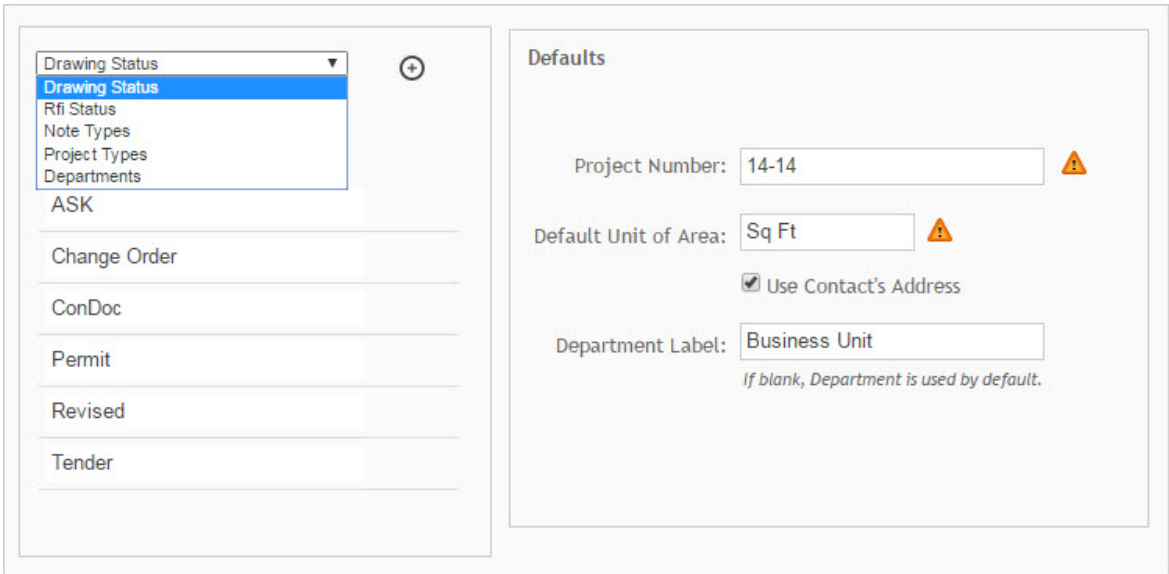
1. Select Preferences from the *master* drop-down list.
2. Open the *Contact* folder and click **Defaults**.
3. Make a selection from the default type drop-down list. You can create new defaults for address types, communication types, contact types, custom check boxes, salutation types and terms. For further details, see the Contact -Defaults preferences.
4. Enter text for the new default in the last row of the list and click **Save**.
5. Click **Formats** in the *Contacts* folder. Configure the default display format of the contact name as instructed in Preferences -Contact-Formats.

Project

Reference

PREFERENCES-PROJECT-DEFAULTS

Use the Project-Default preferences to specify default settings for new projects added to ArchiOffice.



Default Types

Drawing Status:
Customize the list of options for drawing status for submittal, drawing and RFI tracking in your projects.

Notes Types:
Customize the list of options to categorize the type of notes available for selection.

Project Types:
Customize the list of project types available for selection.

Departments:
Add departments to designate which department or office is involved in a project. The items added here can be selected from the *Office* drop-down list on the Projects-Details screen.

RFI Status:
The current status of the RFI. You can select the status as open or closed.

Add ⊕:
Click ⊕ to add a default type.

Description:
Click this field to edit a role description.

Delete ⊖:
Click ⊖ to delete a listed item.

Defaults

Project Number:
The number displayed in this field is the next number that will be offered for use when a new project is created. You can use this field to set the default project-numbering scheme you want to use. The project number can contain any mix of digits and characters, but cannot be more than 11 characters long. You can enter any number you want, but it must be unique. The last 4 characters must be numeric, so the auto-incrementing can work.

Default Unit of Area:
The default unit is used for the project area in the Projects -General-Data screen. For example, enter "Sq. Ft", "Sq. Meters", etc.

Use Contact's Address:
Select this check box to have a contact's address used as a project's address when creating a new project.

Department Label:
This is an additional field provided in the Projects -Details screen that allows for categorizing your projects by office (if you have multiple offices), studio or different departments within your organization. Creating a name for this field will be reflected in the project so during the project set up stage, the project administrator needs to enter a value for this field. This field can contain any mix of digits and characters, but cannot be greater than 100 characters.

If this field is left blank, ArchiOffice uses Department as the default label. Any change in the label is reflected on the Projects - Details and Projects - Search screens.

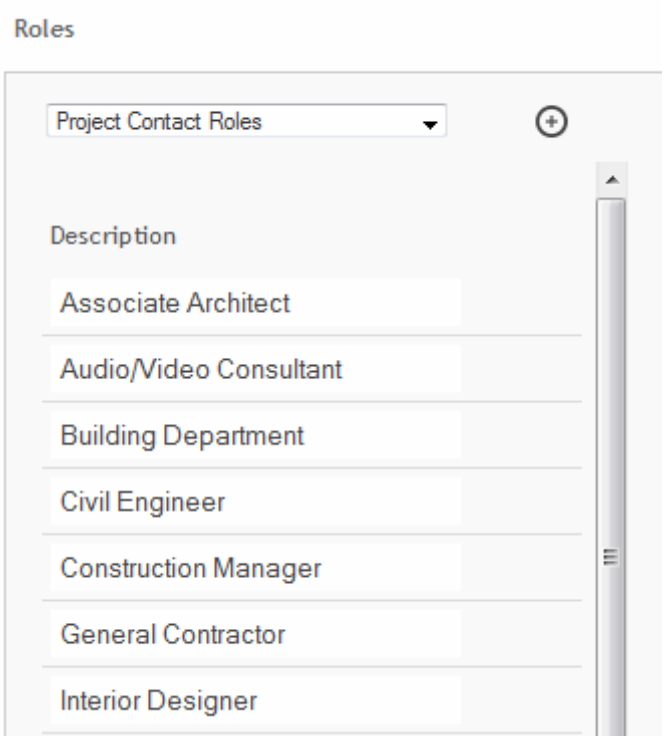
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - PROJECT - ROLES

Use the Project - Roles preferences to add or delete the default roles for project teams and contacts.



Roles
Select a category from this drop-down list to add or delete default project contact or project team roles.

- **Project Contact Roles**: Add the default project-contact roles. These should be the common contact roles of others working on your projects (other than users) that you routinely use. Keep in mind that these are just defaults that are available for selection in the Projects-Contacts portal when a user goes to the Projects - General screen.
- **Project Team Roles:** Add the default project-team roles. These should be the common team roles that you routinely use for your projects. Keep in mind, these are just defaults that are available for selection in the Detail tab when a user is added to a project in the project's portal.

Add ⊕:
Click ⊕ to add a contact or team role.

Description:
Click this field to edit a role description.

Delete ⊖:
If you want to delete a contact or team role from the defaults, then click ⊖. This will not affect any existing projects already using this role. It will just remove it from the default set.

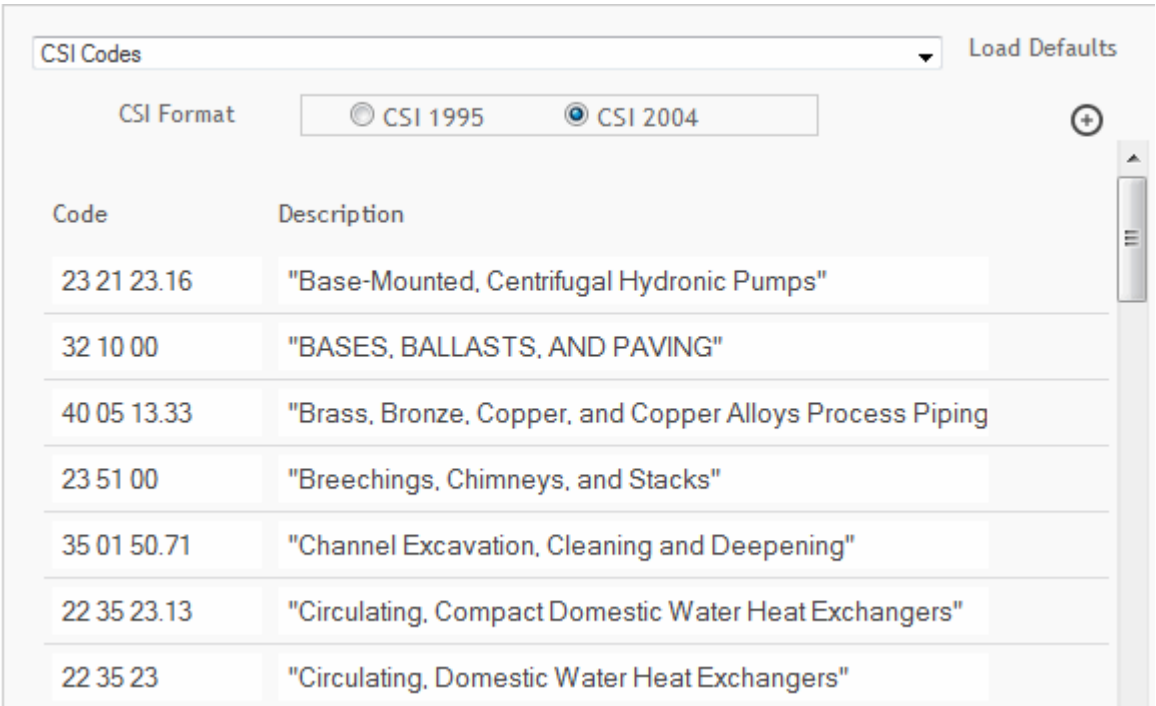
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - PROJECT - SUBMITTALS

Use the Project - Submittals preferences to add the default menu choice for submittal items.



Submittals
Select the following from the drop-down list.

- **CSI Codes:** The Code Structure Identifier field provides a standard list of CSI Codes, but can be customized to meet your needs.
- **Submittal Status:** This list can be customized to suit the submittal tracking needs of your projects.
- **Submittal Types**: Customize this list to meet your particular project needs to define the types of submittals you will be tracking.
- **Submitted By:** Customize this list to identify who will submit this information for a project.

Add ⊕
Click ⊕ to add an item to one of the selected lists.

CSI Format
Choose the CSI (Code Structure Identifier) code standard to be used **CSI 1995** or **CSI 2004**. Click Save to save your choice.

Load Defaults
Click to load the submittal defaults.

Delete
Click to remove an item from the list.

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - PROJECT - SF330

The Project - SF330 preferences should be updated with your default function and profile codes. These codes are used primarily for U.S. Government or federal contract jobs. Use the options on this screen to edit existing codes or add codes describing disciplines and experiences unique to your firm.

SF330 Codes
Make a selection from this drop-down list to view, edit or add SF330 function or profile Codes.

Add
Click to add a new code.

Code:
Enter a value for the function or profile code in this column.

Description:
Enter descriptive text for the code in this column.

Delete
Click to remove a code.

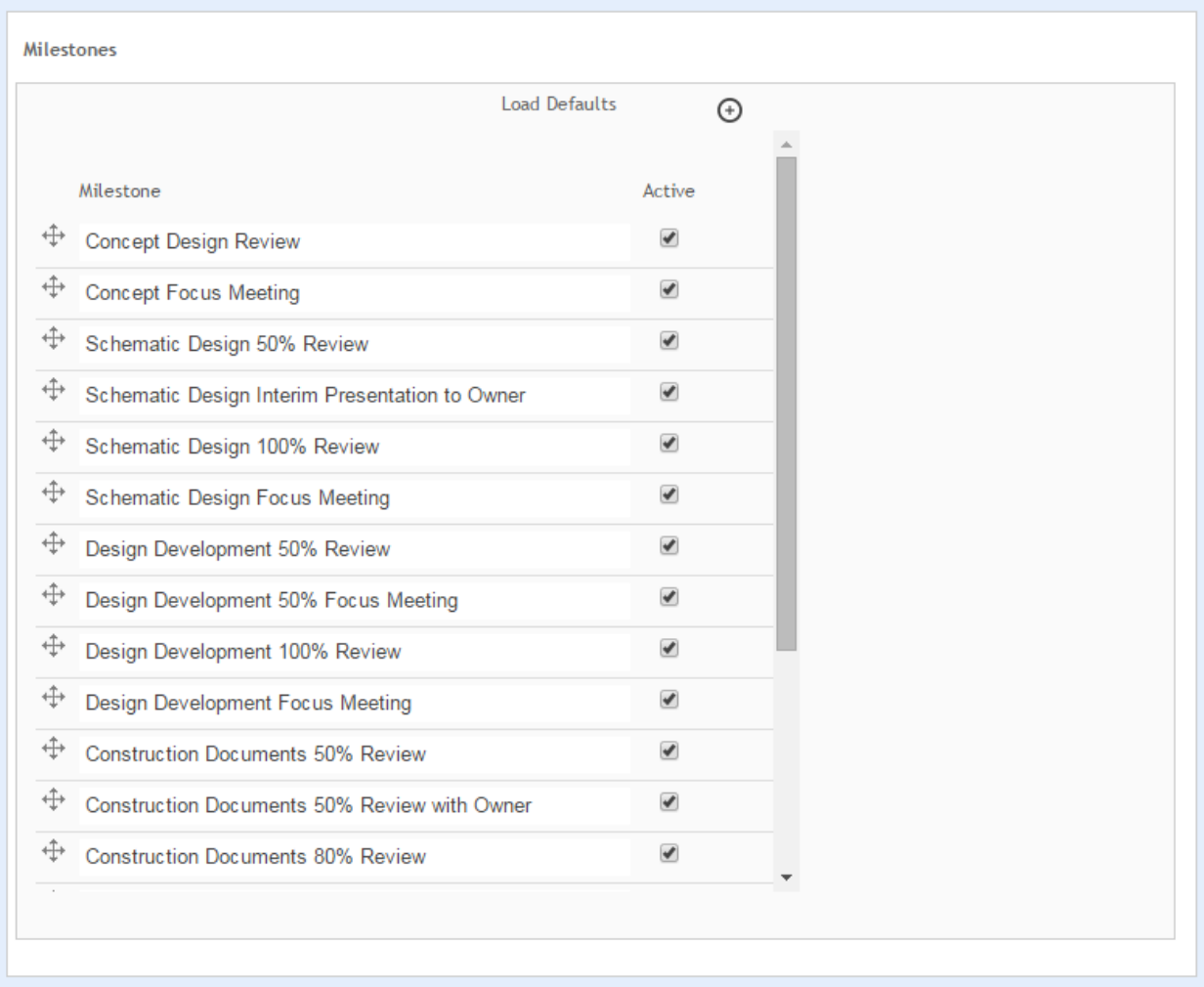
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES-PROJECT-MILESTONES

Use the Project-Milestones preferences to set up default milestones for your projects. These should be the common milestones that you routinely use for managing your key reviews and stages of your projects. Keep in mind, that these are just defaults that will appear in the Add Milestone dialog box when you add milestones to a project in the Project General view. You can also create custom milestones and assign due dates for any milestone in the Projects-General screen.



Load Defaults:
Click this link to load ArchiOffice default milestones.

This deletes all existing milestones that have been added since installing ArchiOffice. It can also affect data if the current milestones have been used.

Save & Add New :
Click to create new project milestones.

Milestone:
List of existing project milestones. Click a field to edit a milestone's label. You can arrange or swap the milestones in any desired order using the Move Up/Down arrows on the left. On the creation of a new project, the milestones follow the same order.

You can reorder the milestone list by dragging and dropping them at the desired location. Click and hold the mouse button on the milestone that is to be moved and then release the mouse button at the target location (for the milestone being repositioned).

Active:
Select this check box to make a milestone active.

Delete ⊖:
Click ⊖ to remove a milestone from the list. This will not affect any existing projects already using this milestone, it will just remove it from the Add Milestone dialog box.

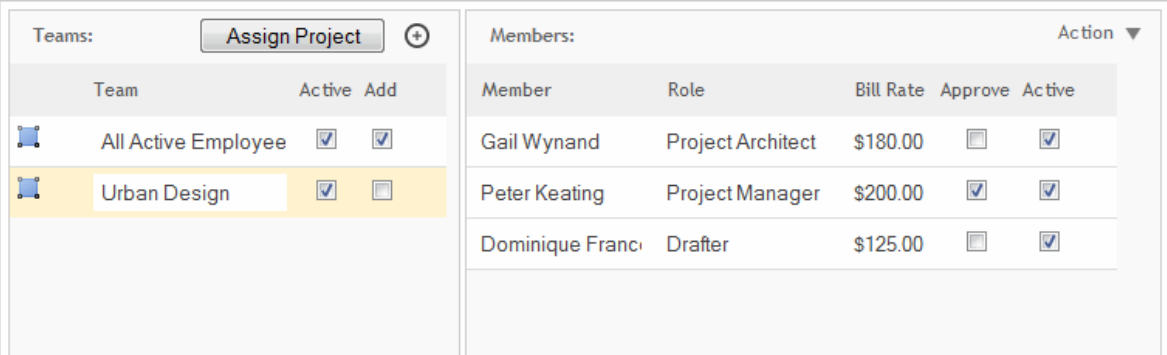
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - PROJECT - TEAMS

Use the Project - Teams preferences to assign employee teams to projects or project types, define team member roles and set billing rates. You can also specify whether or not team members can approve time and expense.



Teams

Assign Project:
Click this button to assign a project to a team. On clicking this button, you will be prompted to determine whether to add the team to a specific project or add to projects by a project type (for example, commercial, interior design, etc.). When a team is assigned to a project type, all the users in that team get added to all such new projects.

Add Team ⊕:
Click ⊕ to create a new team.

Select:
Click to select a listed team.

Team:
Enter a name for a new team in this column.

Active:
Select this check box to have the team display on the Project Team screen in the Projects - Details screen.

Add:
Select this check box to have a team assigned to a new project by default.

Delete ⊖:
Click ⊖ to delete a selected team. You can view this when you select a row or hover over it.

Members

Member:
The employee names that make up the team. Click a field in this column to select or change a listed team member.

Role:
The role for the employee in this team. This can be changed at the project level by an authorized user in the Projects - Details screen. See Preferences - Project - Roles for details on the project team-member roles.

Bill Rate:
The billing rate for this employee on the team. Click this field to edit the value. This can be changed at the project level by an authorized user in the Projects - Details screen.

Approve:
Select this check box if you want the employee on the team to have the ability to approve time entries for the project to which the team is assigned. Keep in mind that this can be changed by an authorized user in the Projects - Details screen.

Active:
Designates an active status to the team. Only active team members can enter time and expense entries for the project.

Delete ⊖:
Click ⊖ to remove the employee from the team.

Action

Add:
Select to add a new member to a project team.

Add All Active Employees:
Select to add all active employees to a project team automatically.

Remove Inactive Employees:
Select to remove all inactive employees from a team.

Remove Terminated Employees:
Select to remove all terminated employees from a team.

Update Rates:
Select to update the rates for all employees in the list with rates entered under their *User Default Charge Rates* setting.

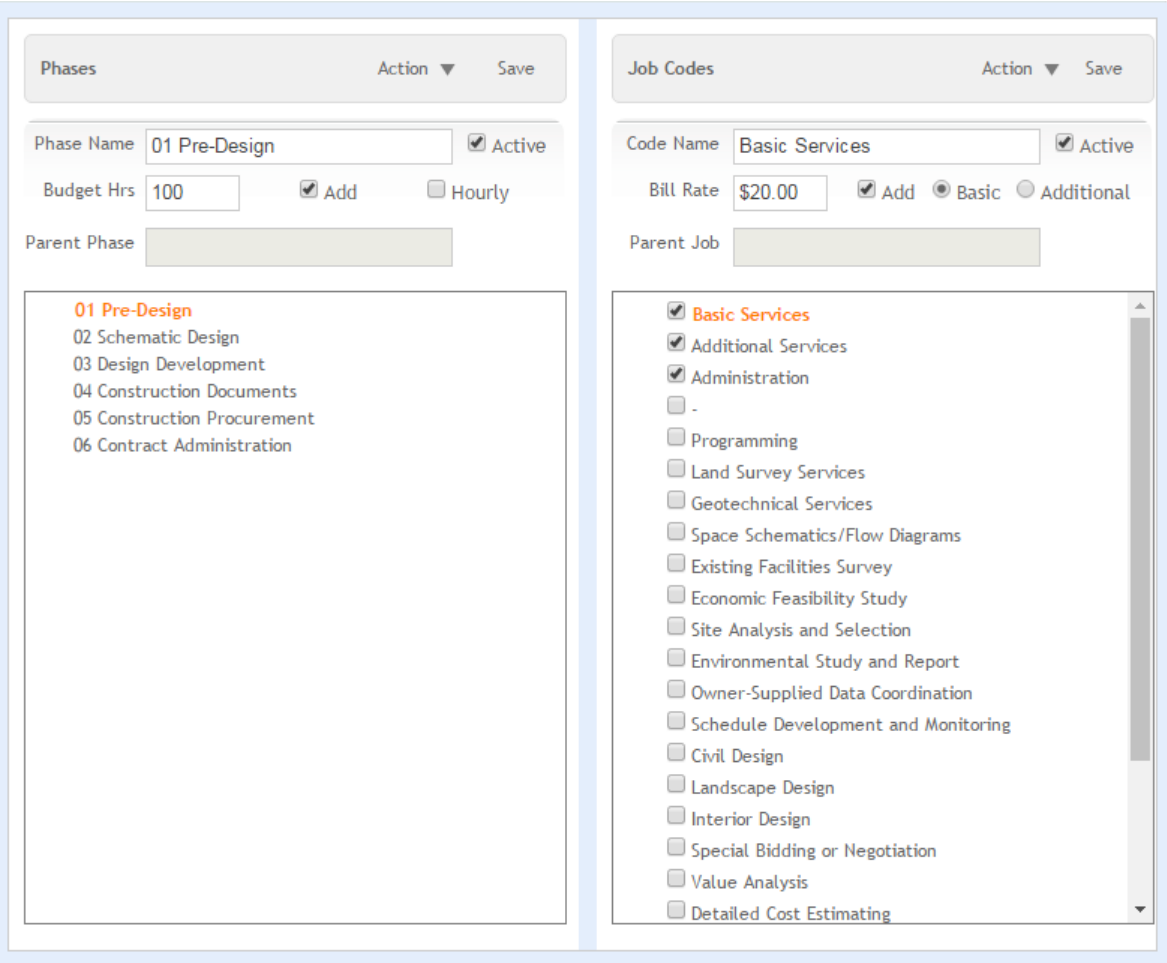
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - PROJECT - PHASES/JOB CODES

Use the Project - Phases/Job Codes preferences to create and modify default phases and associated job codes. This screen is divided into two panels. In the Phase panel, you can add the default project phases your firm typically uses, control whether phases should be hourly by default, and configure phases so they are automatically added to all new projects. In the Job Code panel, you can add a new root job code or add a child job code to a selected root job code. You can also define job codes as basic or additional service types and determine whether they should be automatically added to all new projects.



Phases

This section displays existing project phases.

Action

Load Default:
Choose this option to reload ArchiOffice default phases.

Add Main:
Select to insert a phase at the root level.

Sort A to Z:
Click to sort phases in ascending alphanumeric order.

Sort Z to A:
Click to sort phases in descending alphanumeric order.

Sub:
Select to insert a phase as a child of a selected parent phase.

Delete
If you want to delete a phase from the defaults, select this option. This will not affect any existing projects already using this phase.

Move Up and Down:
Select one of these options to change the phase order.

If you make use of child phases, we do not recommend having more than one level of children.

Save:
Click to save changes made to phase settings.

Phase Name:
Enter or edit the name of a selected phase. You can name them anything you want. Keep in mind your users will be selecting from available project phases when entering time and expense entries, so make sure the phase descriptions are precise allowing employees to classify their time and expenses properly.

Active:
Normally this check box is selected. Only active phases are available when users attempt to enter time entries on this project. If, for some reason, you decide the phase should be a part of all new projects, but when added should not be active at the beginning of the project, then clear this box.

Budget Hrs:
The default hours (if any) to be used for this phase. You do not need to specify anything here, as it is quite common for every project to have its own specific needs. The budget hours can be entered in the Projects-Budget screen.

Add:
If you want a phase to be added automatically to all new projects created in the system, then select the check box.

Hourly:
If this phase is to be considered hourly when invoiced, regardless if the rest of the phases are fixed fee, then select this check box. If you are working with a fixed fee project, by selecting this check box, you are instructing the system to consider all time entries entered against this phase as time and material, and they will be billed as additional hourly fees on a fixed fee Invoice. It is not necessary to check this box if the projects are billed on an hourly basis.

Parent Phase:
Displays the name of the phase to which a child-phase belongs.

Phase List:
Displays a list of existing parent and child phases. Highlight a listed phase to view its associated codes in the adjacent Job Code panel.

Job Codes

This section displays existing project job codes.

Action

Load Default:
Choose this option to reload ArchiOffice default job codes.

Add Main
Select to insert a job code at the root level.

Sort A to Z:
Click to sort phases in ascending alphanumeric order.

Sort Z to A:
Click to sort phases in descending alphanumeric order.

Sub
Select to insert a job code as a child of a selected job code.

Delete
If you want to delete the job code from the defaults, then select this option. This will not affect any existing projects already using this job code.

Move Up and Down:
Select one of these options to change the job code order.

Add to all Active Projects:
Click to add the selected job code to all the active projects. If the phase associated with the selected job code is present in the project, the selected job code is then added to the project and marked checked for that phase.

Based on certain invoice formats, we do not recommend adding child job codes. However, if you choose to make use of child job codes, we do not recommend having more than one level of children.

Save:
Click to save changes made to job code settings.

Code Name:
Enter the name of the job code. You can name them anything you want. Keep in mind your users will be selecting from available project job codes when entering time and expenses, so make sure the job code descriptions are precise allowing employees to classify their time and expenses properly.

Active:
Select this check box to make the selected job code available for projects. When this option is cleared, the job code will not display in project job-code list for new projects. Deactivating a job code does not affect existing projects.

Bill Rate:
You can specify a default bill rate for any job code. This will be used as the default, but can be changed on a project-by-project basis. This allows you to use a different rate for different services, independent of the project team member's billing rate. For example, if the project team member's billing rate is normally $125/hour, but you specify a $35/hour

rate for an "Admin" job code, then the $35/hour rate would be used by any employee who records a time entry and uses the "Admin" job code. Keep in mind, not all employees see the billing rate (this is controlled by the settings a user account in the Users - Security preferences).

Add:
When this check box is selected, the selected job code will be added to all new projects so that the members of the team can choose this job code when entering time.

Basic:
Choose this option when working with fixed fee projects if you want to use the job code for time that is part of the fixed fee.

Additional:
Choose this option to have all time billed as time and materials, in addition to the fixed fee.

Typically, job codes corresponding to expenses will be set to basic, as all expenses are billed in addition to any fixed fee.

Parent Code
Displays the name of the code to which a child-code belongs.

Code List:
Select which of the available job codes you want to associate with a selected project phase.

By default, Basic Services, Additional Services and Administration job codes are checked for the all phases and sub phases.

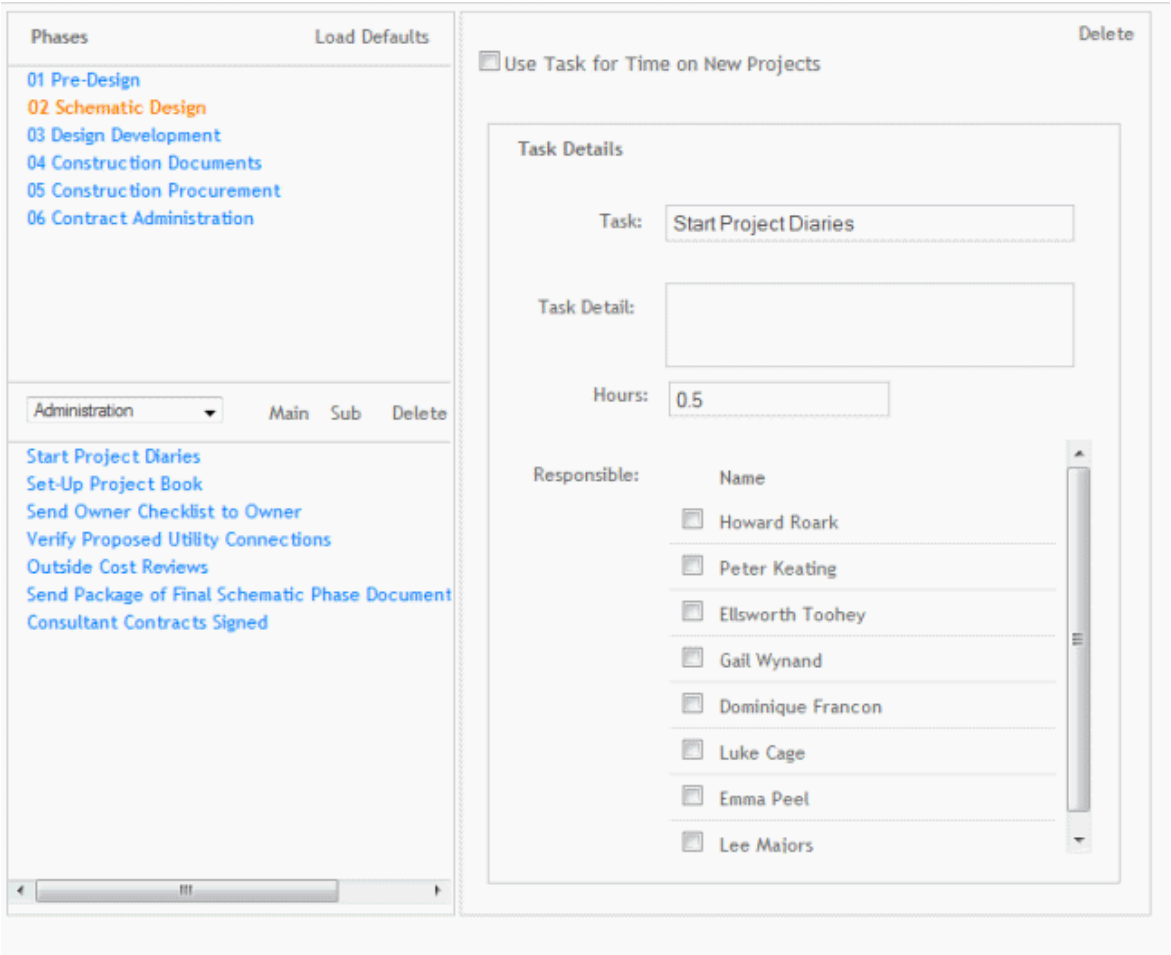
Button Panel

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - PROJECT - TASKS

Use the Project - Tasks preferences to create phase-specific default tasks that need to be completed for a project. When you add tasks here, every new project added in ArchiOffice will automatically have this task added to it. Tasks are added by phase and are broken down into types. The three default types are Administration, Documents, and Reports. Customized types of tasks can be added. Use these settings to specify the number of hours spent on the task and assign an employee to complete the tasks. The default project tasks created using these settings can be loaded and also customized on a project-by-project basis in the Projects - Tasks screen.

The Tasks feature is available in the Professional and Enterprise editions only.



Use Tasks for Time on New Projects:
Select this check box to use tasks when entering time entries on either timecards or time detail layouts. When this option is selected, tasks display in the grid of the Projects - Time/Expense screen instead of the *Description* column. Tasks will also be included in the time entry line on the Time screen.

Delete:
Click this link to delete a selected phase.

Phases

This section displays existing phases and their related tasks (that is, checklists).

The phase list is automatically pulled from the default Project - Phases preferences.

Load Defaults:
Click this link to reload the missing default tasks and task types. You will receive a warning asking if you are certain you want to replace all existing tasks and task types with the system defaults and informing you that it may affect other data if these tasks are already in use.

Tasks Type:
Tasks are categorized by type (Administration, Reports, and Documents). Make a selection from this drop-down list to display a list of tasks for a specific type. Select *ADD TASK TYPE* from this drop-down list to create a new type of task.

Main:
Click this to insert a task at the root level.

Sub:
Click this to insert a task as a child of a selected task.

You can add up to four levels of sub-tasks, but we do not recommend having more than one level of sub-tasks.

Delete:
Click this link to delete a selected task type.

You cannot delete a task if it has been used by a time or expense entry.

Tasks Details

These details are automatically copied to new projects when they are created.

Task:
The name of the task.

Task Detail:
Description of the task.

Hours:
The number of hours to be spent on the task.

Responsible:
Select the contacts that are responsible for completing this task.

Button Panel

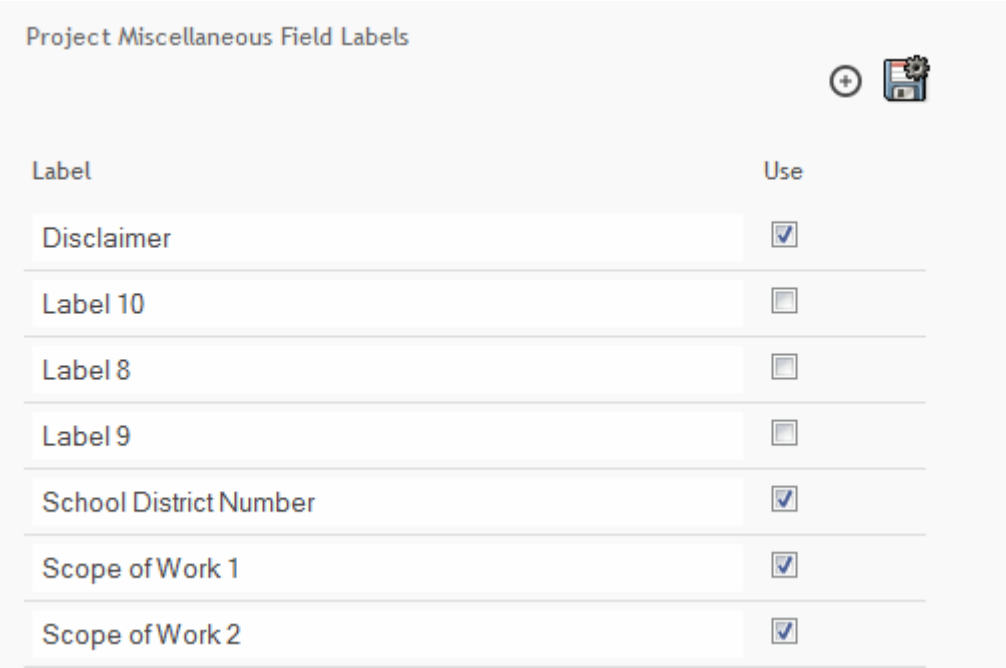
Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES-PROJECT - MISCELLANEOUS

Use the Project - Miscellaneous preferences to add customizable fields for your projects. This creates a default list of additional fields that display in the Projects - General screen under Miscellaneous.

After a custom field is added, you can then enter data for each field at the project level.



Add :
Click to add a new field.

Update all Active Projects with the Custom Fields :
Click to update the label and visibility of these fields in all active projects in the system.

Label:
Enter or edit the label of a custom field.

Use:
Select this check box to make the field active.

Delete :
Click to delete a custom field.

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

How Do I

HOW DO I CONFIGURE PROJECT DEFAULTS?

Use the Project -Defaults preferences to specify default settings for new projects added to ArchiOffice.

Do the following to set up project defaults:

1. Select Preferences from the *master* drop-down list.
2. Open the *Project* folder and click **Defaults**.
3. In the first section of this screen, make a selection from the drop-down list. Select the category containing a list to be modified (for example, Departments).
4. Do one of the following:
   - **Add Item**: After selecting a list category, click **Add** to insert a new item into the list.
   - **Edit Item**: Click a list item's label to edit it.
   - **Delete Item**: Click **Delete** to remove it from the list.
5. In the *Defaults* section, add the default format for Project numbering. The project number can contain any mix of digits and characters, but cannot be greater than 11 characters in size.
6. Set the default *Unit of Area* (e.g., Sq. Ft, Sq. Meters, etc.).
7. Select the **Use Contact's Address** check box to have a contact's address used as a project's address when creating a new project.
8. Enter a label for the drop-down list of departments displayed on the Projects - Details screen. Department is the default label.

HOW DO I ADD DEFAULT ROLES?

Do the following to create default roles for project teams and contacts:

1. Select **Preferences** from the *master* drop-down list.
2. Click **Project** in the *Preferences* category list and then **Roles**.
3. Select the type of role to be created (that is, Contact or Team) from the drop-down list.
4. Click **Add** and enter a name for the role.
5. Click **Save**.

HOW DO I ADD DEFAULT PROJECT MILESTONES?

Use the Project Milestones preferences to set up default milestones for your projects. These should be the common milestones that you routinely use for managing your key reviews and stages of your projects. Keep in mind, that these are just defaults that will

appear in the Add Milestone dialog box when you add milestones to a project in the Project > General View. You can also create custom milestones and assign due dates for any milestone in the Projects > General screen.

Do the following to add default project milestones:

1. Select Preferences from the master drop-down list.
2. Open the *Project* folder and click **Milestones**.
3. Click **Add** to create a new milestone.
4. Click the name of a milestone to edit it.
5. Click **Delete** to remove a selected milestone.

Milestones can also be added via the Projects > General screen. Access this view and click Add Milestone in the *Project Milestones* section.

HOW DO I CREATE PROJECT TEAMS?

Use the Project Teams preferences to build teams of employees to assign to projects, define team member roles and set billing rates. You can also specify whether or not team members can approve entries.

Do the following to create project teams:

1. Select Preferences from the *master* drop-down list.
2. Open the *Project* folder and click **Teams**.
3. Click **Add** in the *Teams* section.
4. Enter a team name.
5. Select the **Active** check box to make this team available for assignment.
6. Select the **Add** check box if you want the team assigned to new projects by default.
7. In the *Members* section, click **Add** to assign an employee to the team. A new line is added to the list of team members.
8. Select the employee's name from the *Member* drop-down list.
9. Select the employee's role from the *Role* drop-down list.
10. Enter a value in the *Bill Rate* column to set the employee's billing rate.
11. Select the **Approve** check box if this employee has that authority.
12. Select the **Active** check box to designate the employee as an active team member.
13. Click **Assign Project** to assign a selected team to a project. You can assign a team to a specific project or by project type.

No employee can be added to a project more than once. If multiple teams are currently set to *Add* and the same employee exists on multiple added teams, only the first instance of the employee will be added.

Click **Update Rates** to update the rates for all employees in the list with rates entered under their default Charge Rate setting.

HOW DO I SET UP DEFAULT PHASES AND JOB CODES?

Use the Preferences -Project-Phases/Job Codes screen to create and modify default phases. You can add the default project phases your firm typically uses, control whether phases should be hourly by default, and configure phases so they are automatically added to all new projects.

Do the following to set up project phases:

1. Select Preferences from the *master* drop-down list.
2. Open the *Project* folder and click **Phases/Codes**.
3. Select one of the default phases in the *Phase* section to edit its settings displayed in the *Phase Details* section. You can modify the phase description, specify required hours, set defaults such as the Hourly or Active status. See the Project - Phases preferences for further details on the phase details you can customize.
4. In the *Associated Job Codes* section, select which of the available job codes you want to associate with a specific project phase.
5. Do one of the following:
    - **Root Phase**: Select **Main** from the *Action* drop-down list to create a root level phase.
    - **Child Phase**: Select **Sub** from the *action* drop-down list to create a sub-task for a currently selected phase.

Select **Delete** from the Action drop-down list to remove a selected phase.

To restore the system default phases, select **Load Defaults** from the *Action* drop-down list.

HOW DO I ADD PROJECT DEFAULT TASKS?

You can create phase specific default tasks that need to be completed for a project. Tasks are added by phase and are broken down into types. The three default types are Administration, Documents, and Reports. Customized types can be added.

You can use these settings to specify the number of hours spent on the task and assign an employee to complete the tasks. A large library of default tasks for the phases is provided. These can be loaded into new projects so they can be assigned to team members quickly.

The default project tasks created using these settings can be modified in the Projects -Tasks screen.

Do the following to add project tasks:

1. Select Preferences from the *master* drop-down list.
2. Open the *Project* folder and click **Tasks**.
3. Select the **Use Tasks for Time on New Projects** check box.

4. Select a phase in the *Phases* section. Its related tasks display in the list below the phases list.
5. Select a task type from the *Type* drop-down list (for example, Administration).
6. Do one of the following:
   - **Edit** an existing default task.
   - **Add** a new task. Click **Main** to create a root level task. Click **Sub** to create a sub-task for a currently selected task.
7. In the *Task Details* section, enter descriptive detail for the selected task.
8. Allocate the number of hours for completing it.
9. Designate the persons responsible for completing the tasks.
10. Click **Save**.

HOW DO I MODIFY PROJECT TASKS?

Do the following to modify project tasks:

1. Select Preferences from the *master* drop-down list.
2. Open the *Project* folder and click **Tasks**.
3. Select a phase in the *Phases* section. Its related tasks display in the list below the phases list.
4. Select a task type from the *Type* drop-down list (for example, Administration) and select a task to modify.
5. The task information displays in the *Task Details* section.
6. Make modifications as needed. Click the **Delete** link in the *Task Details* section to remove the task.

HOW DO I ADD PROJECT TASK TYPES?

Phase tasks are grouped by type (for example, Administrative or Documents). Do the following to add a new task type:

1. Select Preferences from the *master* drop-down list.
2. Open the **Project** folder and click **Tasks**.
3. Select a phase in the *Phases* section. Its related tasks display in the list below the phases list.
4. Select **Add Task type** from the *Type* drop-down list.
5. Enter a description or name for the task type.

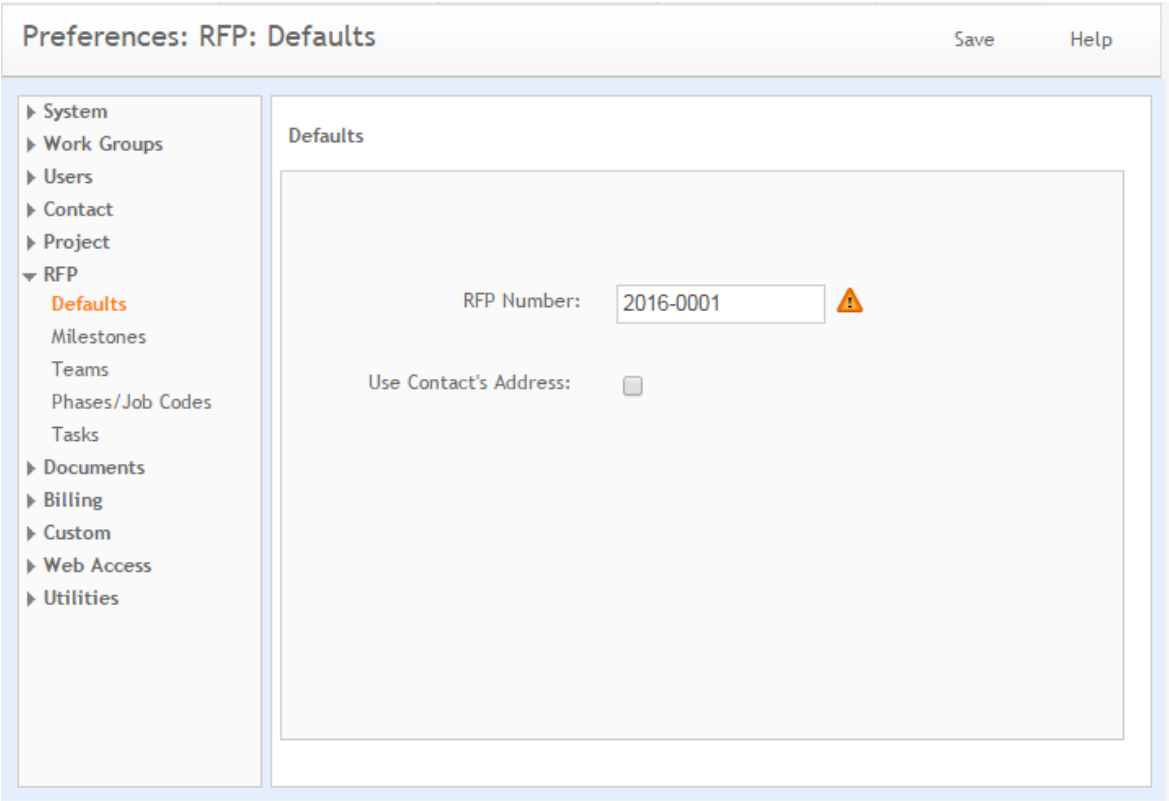
Click **Delete** to remove a task type.

RFP

Reference

PREFERENCES - RFP - DEFAULTS

RFP (Request for Proposal) projects are used to track your pre-contract work prior to being awarded a billable contract. The Preferences - RFP - Defaults screen allows you to set some defaults for these projects.



RFP Number:
This is the default RFP numbering scheme you want to use. The RFP Number can contain any mix of digits and characters but cannot be more than 30 characters long. When you create a new RFP, this number will be auto-incremented and suggested for the new RFP. You can enter any number you want at that time but it must be unique. The last four characters must be numeric so the auto-incrementing can work.

Use Contact's Address:
Select this check box to populate the project address with the Billing Client's address when creating a new RFP project.

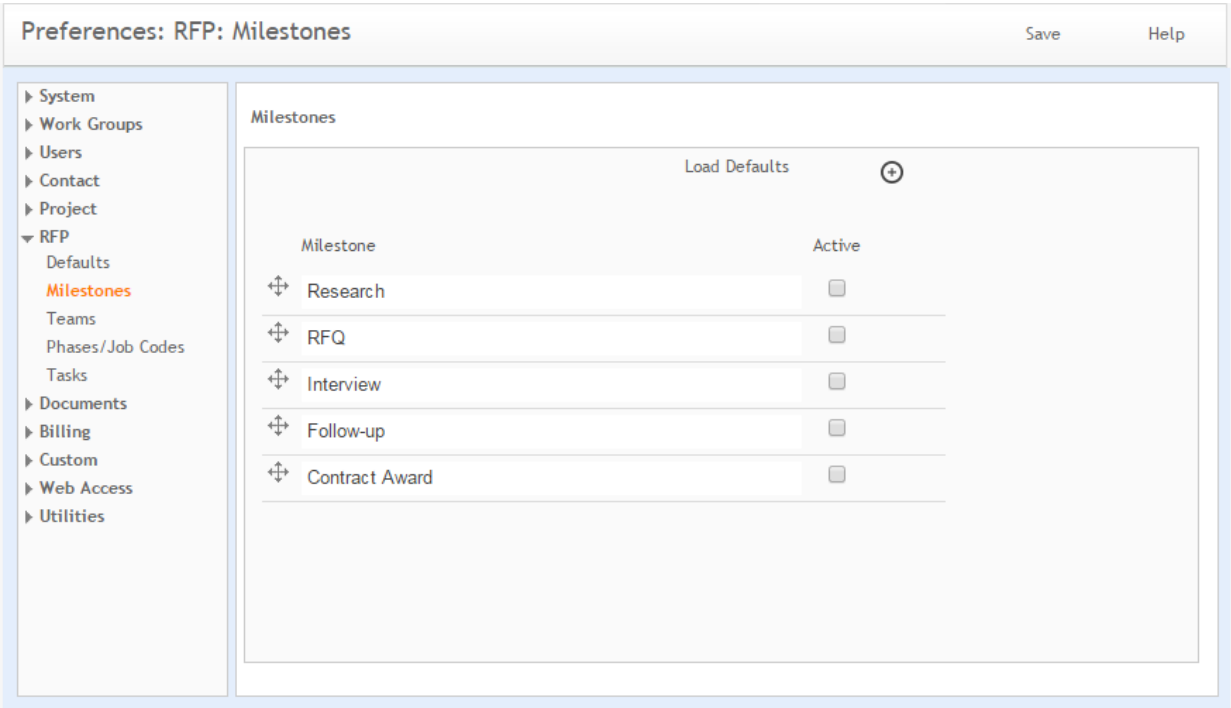
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - RFP - MILESTONES

Use the Project - RFP - Milestone preferences to set up default RFP milestones (that is, projects of type RFP). These should be the milestones that you frequently use for your RFPs. Keep in mind, that these are just defaults that will appear in the Add Milestone dialog box when you go to add milestones to a RFP in the Projects-General - Info screen. You can also create custom milestones and assign due dates for any milestone from that screen.



Load Defaults:
Click this link to load ArchiOffice default milestones.

This will delete all existing milestones that have been added since installing ArchiOffice.

Save & Add New
Click to create new RFP milestones.

Milestones:
List of existing project milestones. Click a field to edit a milestone's label.

You can reorder the milestone list by dragging and dropping them at the desired location. Click and hold the mouse button on the milestone that is to be moved and then release the mouse button at the target location (for the milestone being repositioned).

Active:
Select this check box to make a milestone active.

Delete
Click to remove a milestone from the list. This will not affect any existing projects already using this milestone.

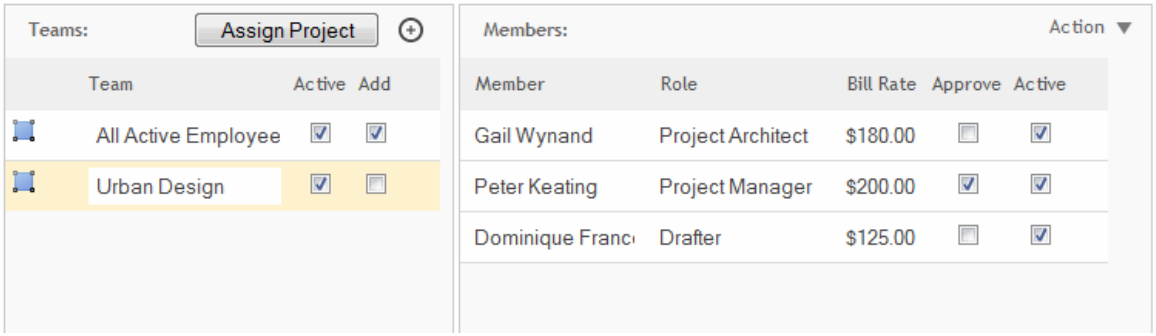
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - RFP - TEAMS

Use the RFP - Teams preferences to build teams of employees to assign to RFPs (Request for Proposal), define team member roles and active status and set billing rates. You can also specify whether or not team members can approve time and expense.



Teams

Assign Project:
Click this button to assign a project to a team. On clicking this button, an Assign Project dialog box appears prompting you, whether to add the team to a specific project /add to projects by a project type.

Save & Add New:
Click to create a new team.

Select:
Click to select a listed team.

Team:
When creating a new team, click the *Add Team* button and enter a name for that team.

Active:
Select this check box if you want the team to be available to assign to a project in the Projects - Details screen.

Add:
Select this check box to have all members of a selected team automatically added to all new projects.

> No employee can exist on a project team more than once. If an employee exists on multiple teams, only the first instance found for that employee is added to the project team.

Delete :
Click to delete a selected team.

Members

Member:
The employee names that make up the team.

Role:
The default role for the employee in this team. This can be changed at the project level by an authorized user in the Projects -Details screen. See Preferences - Project - Roles for details on the project team-member roles.

Bill Rate:
The default-billing rate for this employee on the team. This can be changed at the project level by an authorized user in the Projects -Details screen.

Approve:
Select this check box if you want the employee on the team to have the ability by default to approve time entries for the project to which the team is added.

Active:
Designates a user's team active status. Only active team members can enter time and expenses for the project.

Delete :
Click to remove an employee from the team.

Action

Add:
Add a member to the selected team. You can choose one from the drop-down.

Add All Active Employees:
Click to add all employees with active status to the selected team.

Remove Inactive Employees:
Click to remove all employees with inactive status from the selected team.

Remove Terminated Employees:
Click to remove all terminated employees from the selected team.

Update Rates:
Use this to update the rates for all employees in the list with rates entered under their default Charge Rate setting (Preferences - Users - Defaults).

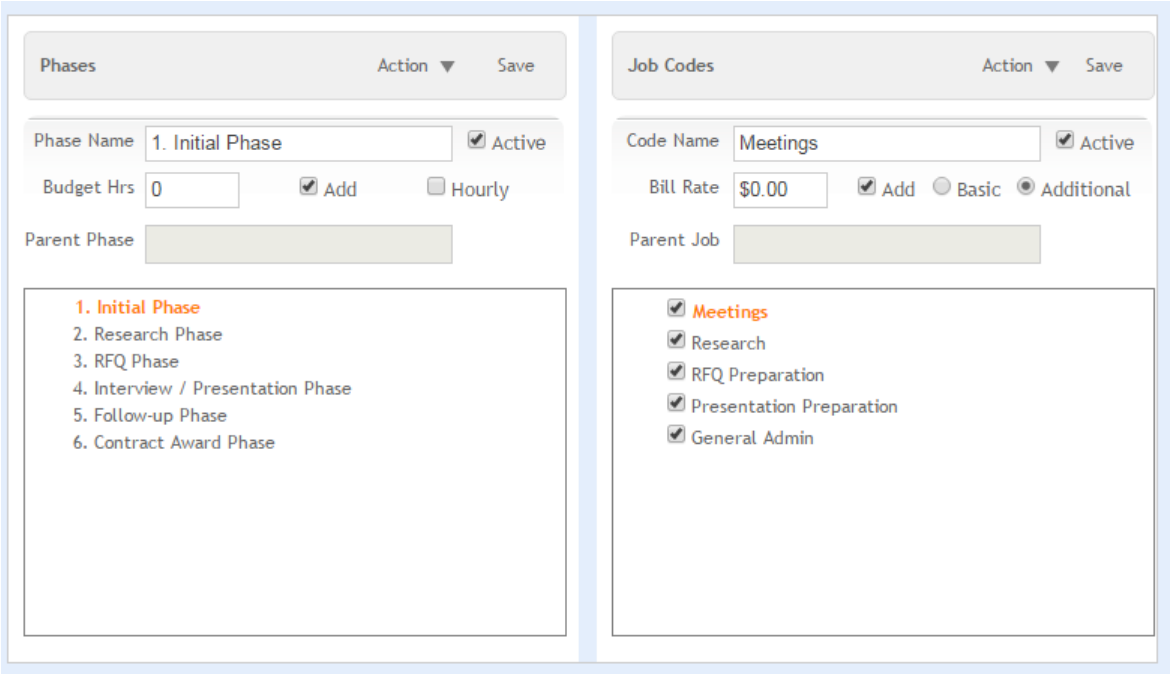
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - RFP - PHASES/JOB CODES

Use the RFP - Phases/Job Codes preferences to create and modify default phases and associated job codes. This screen is divided into two panels. In the Phase panel, you can add the default project phases your firm typically uses, control whether phases should be hourly by default, and configure phases so they are automatically added to all new projects. In the Job Code panel, you can add a new root job code or add a child job code to a selected root job code. You can also define job codes as basic or additional service types and determine whether they should be automatically added to all new projects.



Phases

This section displays existing project phases.

Action

Load Defaults:
Choose this option to reload ArchiOffice default phases.

Add Main:
Select to insert a phase at the root level.

Sort A to Z:
Click to sort phases in ascending alphanumeric order.

Sort Z to A:
Click to sort phases in descending alphanumeric order.

Sub:
Select to insert a phase as a child of a selected phase.

Delete
If you want to delete a phase from the defaults, select this option. This will not affect any existing projects already using this phase.

Move Up and Down:
Select one of these options to change the phase order.

If you make use of child phases, we do not recommend having more than one level of children.

Save:
Click to save changes made to phase settings.

Phase Name:
Enter or edit the name of a selected phase. You can name them anything you want. Keep in mind your users will be selecting from available project phases when entering time and expense entries, so make sure the phase descriptions are precise, allowing employees to classify their time and expenses properly.

Active:
Only active phases are available when users attempt to enter time entries on this project. If, for some reason, you decide the phase should be a part of all new projects, but when added should not be active at the beginning of the project, then clear this check box.

Budget Hrs:
The default hours (if any) to be used for this phase. You do not need to specify anything here, as it is quite common for every project to have its own specific needs. Budget hours can be added to the Projects - Billing - Budgets screen.

Add:
If you want a phase to be added automatically to all new projects created in the system, then select the check box.

Hourly:
If this phase is to be considered hourly when invoiced, regardless if the rest of the phases are fixed fee, then select this check box. If you are working with a fixed fee project, by selecting this check box, you are instructing the system to consider all time entries entered against this phase as time and material, and they will be billed as additional hourly fees on a fixed fee invoice.

Parent Phase:
Displays the name of the phase to which a child-phase belongs.

Phase List:
Displays a list of existing parent and child phases. Highlight a listed phase to view its associated codes in the adjacent Job Codes panel.

Job Codes

This section displays existing project job codes.

Action

Load Defaults:
Choose this option to reload ArchiOffice default job codes.

Add Main
Select to insert a job code at the root level.

Sort A to Z:
Click to sort phases in ascending alphanumeric order.

Sort Z to A:
Click to sort phases in descending alphanumeric order.

Sub
Select to insert a job code as a child of a selected job code.

Delete
If you want to delete the job code from the defaults, select this option. This will not affect any existing projects already using this job code.

Move Up/Down:
Select one of these options to change the job code order.

If you make use of child job codes, we do not recommend having multiple levels of these.

Save:
Click to save changes made to job code settings.

Code Name:
Enter the name of the job code. You can name them anything you want. Keep in mind your users will be selecting from available project job codes when entering time and expenses, so make sure the job code descriptions are precise, allowing employees to classify their time and expenses properly.

Active:
Select this check box to make the selected job code available for projects. When this option is cleared, the job code will not display in the project job-code list for new projects. Deactivating a job code does not affect existing projects.

Bill Rate:
You can specify a default bill rate for any job code. This will be used as the default, but can be changed on a project-by-project basis. This allows you to use a different rate for different services, independent of the RFP team member's billing rate. For example, if the RFP team member's billing rate is normally $125/hour, but you specify a $35/hour rate for an "Admin" job code, then the $35/hour rate would be used by any employee that records a time entry and uses the "Admin" job code. Keep in mind, not all employees see the billing rate (this is controlled by the settings in the Users - Security preferences).

Add:
When this check box is selected, the selected job code will be added to all new projects so that the members of the team can choose this job code when entering time.

Basic:
Choose this option when working with fixed fee projects if you want to use the job code for time that is part of the fixed fee.

Additional:
Choose this option to have all time billed as time and materials, in addition to the fixed fee.

Typically, job codes corresponding to expenses will be set to basic as all expenses are billed in addition to any fixed fee.

Parent Job
Displays the name of the code to which a child code belongs.

Code List:
Select which of the available job codes you want to associate with a selected project phase.

Button Panel

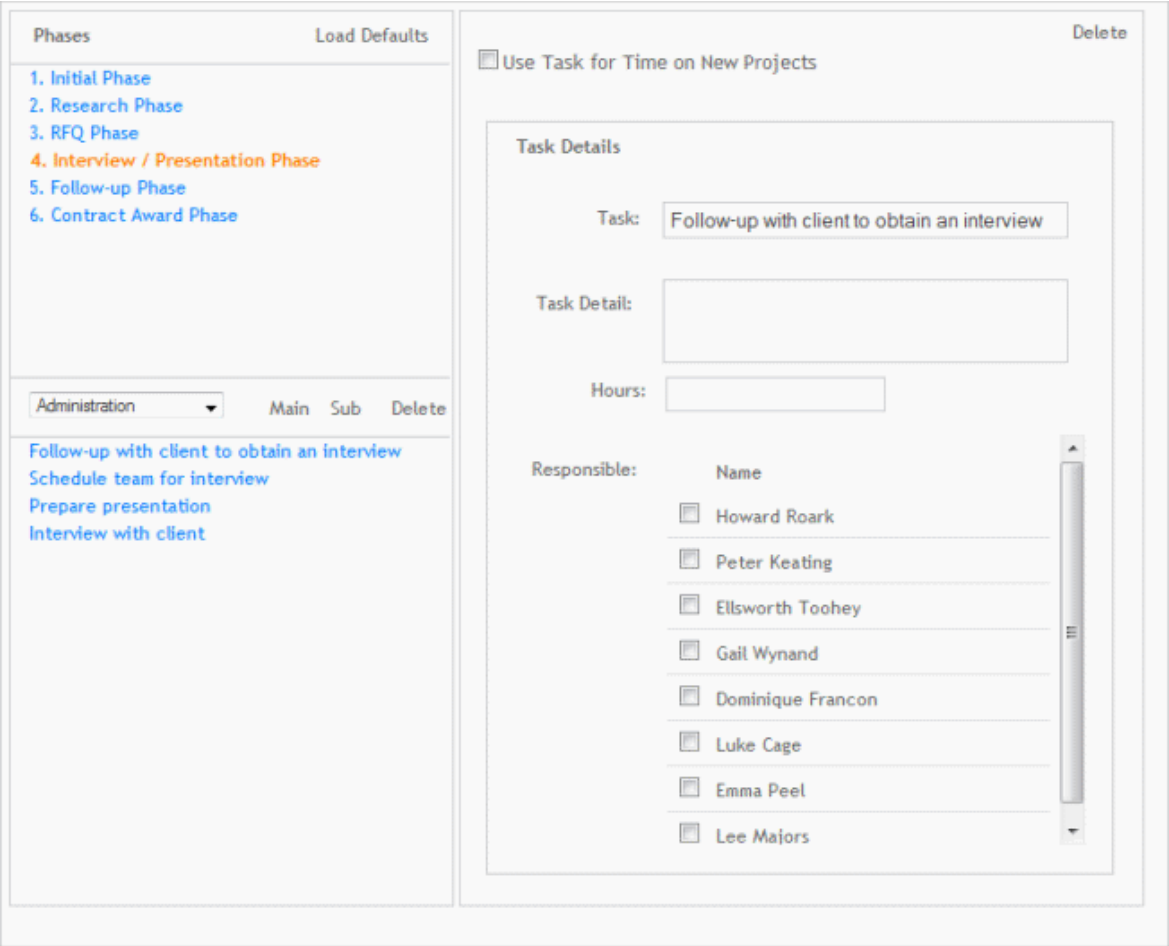
Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES - RFP - TASKS

Use the RFP - Tasks preferences to create phase specific default tasks that need to be completed for an RFP (that is, checklist). When you add tasks here, every new RFP project added in ArchiOffice will automatically have this task added to it. Tasks are added by phase and are broken down into types. You can add customized task types. Use these settings to specify the number of hours to spend on the task and assign an employee to complete the tasks. The default project tasks created using these settings can be loaded and also customized on a project-by-project basis in the Projects - Tasks screen.

The tasks feature is available in the Professional and Enterprise editions only.



Load Defaults
Click this link to reload the missing default tasks and task types. You will receive a warning asking if you are certain you want to replace all existing tasks and task types with the system defaults and informing you that it may affect other data if these tasks are already in use.

Use Tasks for Time on new Projects:
Select this check box to use tasks for time entries on either timecards or time detail layouts. When this option is selected, tasks display in the grid of the Projects - Time/Expense screen instead of the *Description* column. In addition, a *Task* field is added to the time entry line on the Time screen.

Delete:
Click this link to delete a selected phase.

Phases

This section displays existing phase specific tasks.

The phase list is automatically pulled from the default RFP - Phases preferences.

Task Type:
Tasks are categorized by type (for example, Administration, Reports, etc.). Make a selection from this drop-down list to display a list of tasks for a specific type. You can add a new task type by selecting **Add Task Type** from this drop-down list.

Main:
Click this to insert a task at the root level.

Sub:
Click this to insert a task as a child of a selected task.

We do not recommend having multiple levels of child tasks.

Delete:
Click to delete a selected task type.

Task Details

These details are automatically copied to new RFPs when they are created.

Task:
Enter or edit the name of a task in this field.

Task Detail:
Enter or edit descriptive detail for a task.

Hours:
The number of hours to be spent on the task.

Responsible:
Select the contacts that are responsible for completing these tasks.

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

How Do I

HOW DO I SPECIFY RFP DEFAULTS?

Use the RFP Default preferences to specify default settings for new RFPs added to ArchiOffice.

Do the following to set up RFP defaults:

1. Select Preferences from the *master* drop-down list.
2. Open the *RFP* folder and click **Defaults**.
3. Specify the default format for RFP numbering. The number can contain any mix of digits and characters, but cannot be greater than 11 characters in size.
4. Select the **Use Contact's Address** check box to have a contact's address used as a project's address when creating a new project.
5. Click **Save**.

HOW DO I SET UP RFP MILESTONES?

Use the Preferences -RFP-Milestones screen to set up default milestones for your RFPs. These should be the common milestones that you routinely use for managing your key reviews and stages of your RFPs. Keep in mind that these are just defaults that will appear in the Add Milestone dialog box when you add milestones from the Projects - General screen. You can also create custom milestones and assign due dates for any milestone in the Projects > General screen.

Do the following to add default RFP milestones:

1. Select Preferences from the *master* drop-down list.
2. Open the *RFP* folder and click **Milestones**.
3. Do one of the following:

    - **Add**: Enter a milestone in the last row and click **Save** to create a new milestone.
    - **Edit**: Click the name of a milestone to edit it. Click **Save**.
    - **Delete**: Click **Delete** ⊖ to remove a selected milestone.

To restore the system default milestones, click **Load Defaults**.

Milestones can also be added via the Projects > General screen. Access this view and click **Add Milestone** in the *Project Milestones* section.

HOW DO I CREATE RFP TEAMS?

Use the RFP-Teams preferences to build teams of employees to assign to RFPs, define team member roles and set billing rates. You can also specify whether or not team members can approve entries.

Do the following to create RFP teams:

1. Select Preferences from the *master* drop-down list.
2. Open the *RFP* folder and click **Teams**.
3. Click **Add** in the *Teams* section.
4. Enter a team name.
5. Select the **Active** check box to make this team available for assignment.
6. Select the **Add** check box if you want the team assigned to new RFPs by default.
7. In the *Members* section, click **Add** to assign an employee to the team. A new line is added to the list of team members.
8. Select the employee's name from the *Member* drop-down list.
9. Select the employee's role from the *Role* drop-down list.
10. Enter a value in the *Bill Rate* column to set the employee's billing rate.
11. Select the **Approve** check box if this employee has that authority.
12. Select the **Active** check box to designate the employee as an active team member.
13. Click **Assign Project** to assign a selected team to a project. You can assign a team to a specific project or by project type.

No employee can be added to a project more than once. If multiple teams are currently set to *Add* and the same employee exists on multiple added teams, only the first instance of the employee will be added.

Click **Update Rates** to update the rates for all employees in the list with rates entered under their default Charge Rate setting.

HOW DO I SET UP RFP DEFAULT PHASES?

Use the RFP Phases preferences to create and modify default phases. You can add the default RFP phases your firm typically uses, control whether phases should be hourly by default, and configure phases so they are automatically added to all new RFPs.

Do the following to set up RFP phases:

1. Select Preferences from the *master* drop-down list.
2. Open the *RFP* folder and click **Phases/Codes**.
3. Select one of the default phases in the *Phase* section to edit its settings displayed in the *Phase Details* section. You can modify the phase description, specify required hours, and set defaults such as the Hourly or Active status. See Preferences -RFP-Phases/Job Codes for further details on the phase details you can customize.
4. In the *Job Codes* section, select which of the available job codes you want to associate with a specific project phase.

5. Do one of the following:
    - **Main Phase**: Select **Main** from the *Action* drop-down list in the Phase button panel to create a root level phase.
    - **Sub Phase**: Select **sub** from the *Action* drop-down list in the Phase button panel to create a sub-task for a currently selected phase.

Select **Delete** from the *Action* drop-down list in the Phase button panel to remove a selected phase.

To restore the system default phases, select **Load Default** from the *Action* drop-down list.

HOW DO I ADD RFP DEFAULT TASKS?

Use the RFP-Tasks preferences to create phase specific default tasks that need to be completed for RFPs. Tasks are added by phase and are broken down into types. The three default types are Administration, Documents, and Reports. Customized types can be added as well. Use these settings to specify the number of hours to spend on the task and assign an employee to complete the tasks.

A large library of default tasks for the phases is provided. These can be loaded into new RFPs so they can be assigned to team members quickly. Review the list and modify as necessary.

The default RFP tasks created using these settings can be customized in the Projects -Tasks screen.

Do the following to add RFP tasks:

1. Select Preferences from the *master* drop-down list.
2. Open the **RFP** panel and click **Tasks**.
3. Select a phase in the *Phases* section. Its related tasks display in the list below the phases list.
4. Select a task type from the *Type* drop-down list (for example, Administration).
5. Do one of the following:
    - **Main**: Click to create a root level task.
    - **Sub**: Click to create a sub-task for a currently selected task.
6. Enter information for the new task in the *Task Details* section.

HOW DO I MODIFY RFP TASKS?

Do the following to modify RFP tasks:

1. Select Preferences from the *master* drop-down list.
2. Open the *RFP* folder and click **Tasks**.
3. Select a phase in the *Phases* section. Its related tasks display in the list below the phases list.

4. Select a task type from the *Type* drop-down list (for example, Administration) and select a task to modify.
5. The task information displays in the *Task Details* section.
6. Make modifications as needed. Click **Delete** in the *Task Details* section to remove the task.

HOW DO I ADD RFP TASK TYPES?

Phase tasks are grouped by type (for example, Administrative or Documents). Do the following to add a new task type:

1. Select Preferences from the *master* drop-down list.
2. Open the **RFP** folder and click **Tasks**.
3. Select a phase in the *Phases* section. Its related tasks display in the list below the phases.
4. Select **Add Task type** from the *Type* drop-down list.
5. Enter a description or name for the task type.

Click **Delete** to remove a task type.

Documents

Reference

PREFERENCES-DOCUMENTS-TEMPLATE

After installing ArchiOffice, there will be a folder called ArchiOfficeData automatically created on the C: drive of the ArchiOffice server. This folder is used as the storage location for any folders/documents created, moved, duplicated or linked from ArchiOffice. This folder can be placed anywhere in your environment, provided it has full read/write permission for all ArchiOffice users.

Use the Documents -Template preferences to organize document storage structure and template files. You can change the folder location of templates and add new folders. You can also add your own templates. Template specific settings such as restricting who can use a template and limiting the number of times a template can be used per project are available.

Document Templates

The ArchiOffice document management system uses a folder and sub folder filing system for organizing project related documents on the file server. This section displays the document templates and the folder structure in which they are stored.

Add a Root Folder :
Click to insert a root folder.

Add a Child Folder :
Click to insert a child folder.

If using child folders, we do not recommend having more than one level of child folders.

Add New Template File :
Click to add a template file to a selected folder.

If using child folders, we do not recommend having more than one level of child folders.

Template Details

Title:
The title of the document template.

File Name:
This read-only field displays the template's file name.

Delete :
Click to either remove the link to a selected template file or delete the link and the file.

Template:
This read-only field displays the file format of the selected template (for example, Text or Folder).

Add to New Projects:
Select this check box to include a selected folder in the template filing system for new projects.

This option is not available for certain system folders, which have special functions throughout the system.

Create:
Select a program from this drop-down list to use for viewing or editing a selected template. This program will start automatically when the template is opened via ArchiOffice.

Description:
Enter descriptive detail for a selected template.

Show in Quick Docs:
Select this check box to list the template on the Quick Docs tab when a user creates a document.

Requires Contact Data:
Select this check box to require the user to select a contact name before creating a document.

Requires Project Data:
Select this check box to require a user to select a project before creating a document.

Use Sequence Number:
Select this check box to allow this template to maintain a running sequence number every time it is used. The sequence number is incremented as and when new documents are created using the same template. A starting sequence number can be entered in the *Sequence* field.

Unique for Project:
Select this check box so the document can only be created once for each project using this template. This would apply to such documents as proposals or punch lists where administrators want information added to existing documents rather than creating new documents each time.

Restrict Users:
Select this check box so only users with permission to create restricted documents can create a document based on the selected template.

RTF Field Substitution:
The templates used in ArchiOffice are stored in Rich Text format. These templates contain field names (for example, project name, project number, customer name, etc.). If this check box is selected, when a template is used to create a document, the fields are substituted with data from ArchiOffice.

This option is typically enabled. It would only be unavailable for purely informational documents that do not require data to be pulled from your database.

If using ArchiOffice fields merged into your document, you must select this option or your document will not be created properly.

Date:
The creation date of the template file.

Size:
The size of the template file.

Attach File:
Click this link to specify or change the template file.

Clear File:
Click this link to detach the file associated with the selected template and clear the current file path.

Edit Template:
Click this link to edit the selected template file.

Test File:
Click this link to open the template file with sample data populated into the RTF substitution fields to ensure proper functionality.

> Some configurations of templates do not test correctly due to the nature of the information inserted, but will work correctly when used on an actual project.

File Path PC:
The path of the file associated with your template for computer users.

Button Panel

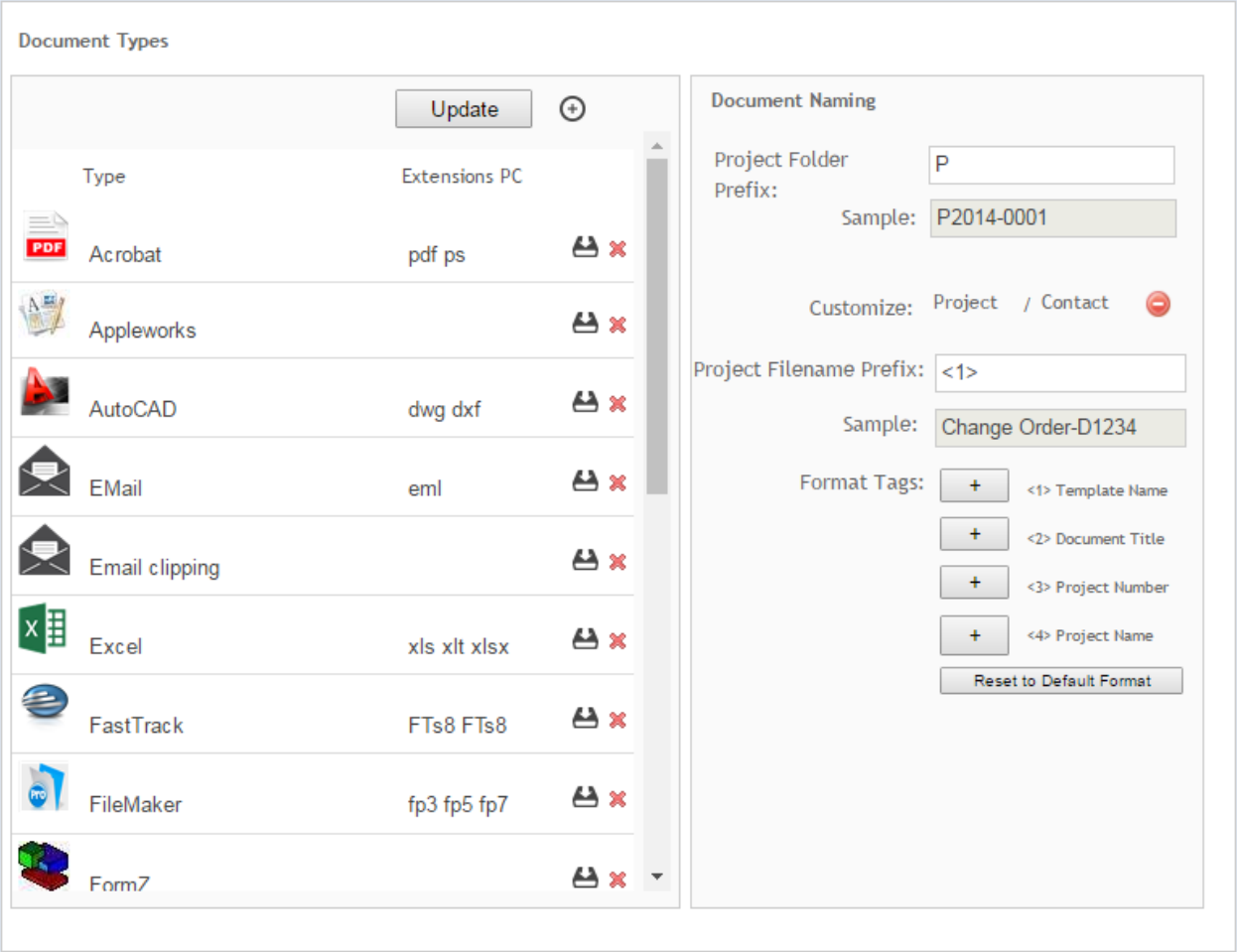
Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES-DOCUMENTS-TYPES

These preferences are used to define the document types frequently used by a firm. This is necessary so files can be automatically recognized and the appropriate type and icon can be displayed for documents.

ArchiOffice recognizes all files linked or created to the system by file type extension, just as the operating system does. After a file type is added, ArchiOffice displays the associated Type label and icon for new documents that match that file type.



Document Types

Type:
Enter or edit the general description for the file type.

Extensions PC:
The recognized computer extension for a selected file type.

Extensions should be entered without the leading period. Multiple extensions can be entered by separating each extension with a single space.

Add ⊕:
Click ⊕ to create new document types. Creating new document types will not update existing documents that are of unknown type, even if you have just created the file type.

Update:
Click this button to update the icons displayed on all existing documents in the system.

Delete ⊖:
Click ⊖ to delete a selected file type.

Document Naming

Project Folder Prefix:
Sets the default folder naming convention for the project storage. All documents created will be stored on your file server, in a folder following this convention. By default, all project folders will be created with a P in front of the project number.

Sample:
Shows an example of the folder naming convention, based on the current project folder prefix setting.

Customize:
You can create custom file name prefixes for both project and contact documents. Click **Project** or **Contact** to display the related customization options.

Project/Contact Filename Prefix:
Use this field to create filename prefixes for project or contact documents created from templates. Use the *Format Tag* buttons to add the field names (for example, project name or number) in the desired order. You can type plain text into this field to add additional formatting.

Sample:
Shows an example of the document naming convention.

Format Tags:
These tags are used to construct the prefix format. Click the **+** button by a tag to insert it into the *Project/Contact Filename Prefix* field.

Reset to Default Format:
Resets the project or contact filename Prefix to its default format.

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES-DOCUMENTS-PATHS

You can use the options on this screen to define the paths to be used by the ArchiOffice document management system. You can specify the location of the ArchiOffice documents folders (for example, ArchiOfficeData\2017) that contain all the project documents and templates used by the system. If you do not set up the paths properly, you will not be able to create project documents.

By default, ArchiOffice creates the following folder: X:\ArchiOfficeData\2017\ (X is the physical drive on which Internet Information Services (IIS) is installed). It contains sub-folders for sample templates and document storage. By default, ArchiOffice sets the

document paths to this folder. These directory paths must be entered in the UNC format (for example, \\ServerIPAddress\shareddocumentfolder\ or \\192.168.4.5\ArchiOfficeData\2017\Templates2017).

The documents should be stored in a shared folder on the network or file server where all users can access them from ArchiOffice. All users must have full access to these folders. This is possible when *Read/Write* permissions are given to *Everyone*, *IUSR* and *Network Service* for the shared folder. In addition, the share permissions must be set to allow *Everyone* Full Control.

See the KB article on How Do I Set the UNC Path for ArchiOffice Documents. If your documents are on a Mac file server, check the Knowledge Base article on how to handle that.

Location of document templates:
Use this field to specify the path to the folder containing ArchiOffice template files. The 2017 templates are in the RTF format (.rtf files).

Project/Contact document location:
Use this field to specify the path to the folder that contains all the project and contact documents.

Typically, on a Computer Network, a share to the actual location is created, and a mapped network drive letter is put on all client machines. That mapped path is then the location that is specified in this field.

Legacy Invoices Location:
To access finalized invoices from previous ArchiOffice versions (say 2017), specify their location in this field. You will be able to view these invoices in their original PDF format. The path entered must be specified using the UNC format (for example, \\192.168.68.22\AO2017Docs\Invoices).

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

How Do I

HOW DO I CUSTOMIZE TEMPLATES FILING SYSTEM?

Use the Preferences > Documents > Template screen to organize your template files. You can change the folder location of templates and add new folders. You can also add your own templates. Template specific settings such as restricting who can use a template and limiting the number of times a template can be used per project are available.

Organize Template Filing System

Do the following to customize the template filing system:

1. Select Preferences from the *master* drop-down list.
2. Open the *Documents* folder and click **Template**.
3. Add folders to create a file storage structure to suit your firm's needs by doing one of the following:
   - **Root Folder**: Click **Main** to create folders at the root level.
   - **Child Folder**: Click **Sub** to add a child folder to a selected folder.
4. Click a folder or template to display its details in the *Template Details* section. You can change the name of a file or folder. For a template entry, you can add descriptive detail and test or change the attached file. In addition you can, configure settings to control who can use the file and how many times the file can be used. See Preferences > Documents-Template for more details on the available options that can be set up.

Add a New Template File

Do the following to add a new template file:

1. Select Preferences from the *master* drop-down list.
2. Open the *Documents* folder and click **Template**.
3. Select a folder to which the file will be added.
4. Click **Add New Template File**.
5. Browse to and select the file to be added. The file displays in the selected folder and its details display in the *Template Details* section.
6. Edit the files descriptive detail and configurations as needed. See Preferences > Documents-Template for more details on the available options that can be set up.

HOW DO I DEFINE DOCUMENT TYPES?

Document types are used in a company so documents can be automatically recognized. In addition, the appropriate type and icon display for documents in ArchiOffice.

ArchiOffice recognizes all files linked to the system by defined file type extensions, just as your operating system does-and will display a Type label and icon for the item.

Do the following to define document types:

1. Select Preferences from the *master* drop-down list.
2. Open the *Documents* folder and click **Types**.
3. You can create new document types by clicking **Add**.

   Creating new document types will not update existing documents that are of unknown type, even if you have just created the file type.

4. Click the **Update** button to update all documents in all projects to reflect the changes on this screen.

HOW DO I SPECIFY DOCUMENT STORAGE & LINK PATHS?

Use the Preferences- Documents-Paths screen to define the paths to be used by the ArchiOffice document management system. You will specify the path to the ArchiOffice documents folder-typically ArchiOfficeData\2017, which contains all of the templates used by the system.

Do the following to set Document Storage and Link paths:

1. Select Preferences from the *master* drop-down list.
2. Open the *Documents* folder and click Paths.
3. Set the default path to the location where you installed the *ArchiOffice Documents* folder. The path needs to point to the folder:

   \\servername\ArchiOfficeData\2017

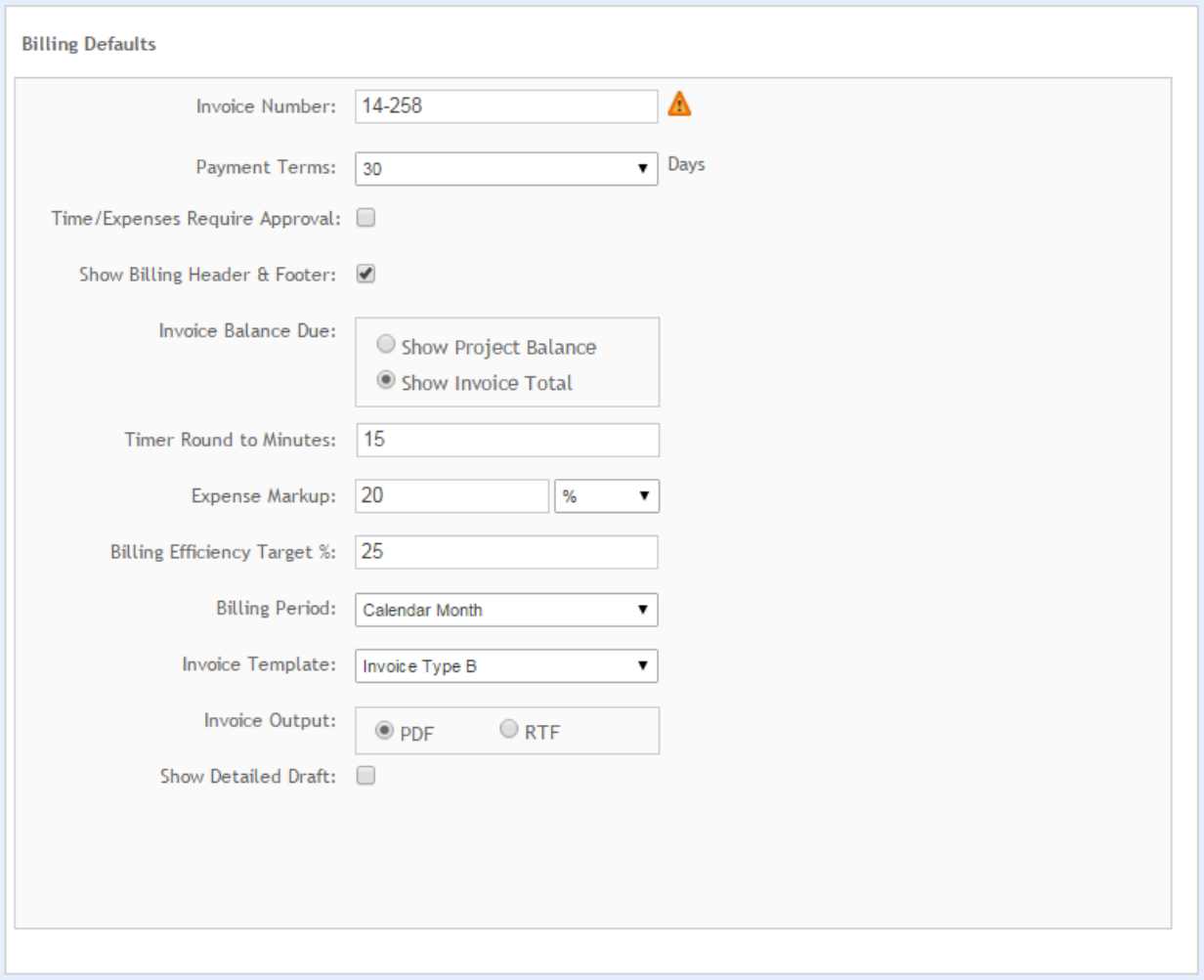
4. If your documents are stored in a directory other than the ArchiOffice documents folder, enter path to that folder. The document link path is used when you already have a folder (can contain sub-folders and files) where you can have documents that you would like to access from ArchiOffice.

Billing

Reference

PREFERENCES-BILLING-DEFAULTS

Use the Preferences-Billing-Defaults screen to set the invoice generation defaults for newly created projects.



Invoice Number:
The number in this field represents the last invoice number issued to create an invoice and can be of any length. You can use this field to specify the custom invoice numbering sequence you want to use. The prefix is optional. It can include numbers, letters and other characters. A sequence number is required for the last segment. It will increase each time an invoice is generated. When using a prefix, insert a separator (dash, space or period) between it and the sequence number (for example, 0001, 2017-100, 2017-0000, INV.001, etc.).

Creating a draft invoice or deleting it does not increment your next invoice number until that invoice is finalized. When draft invoices are finalized, ArchiOffice looks at the invoice numbers of all existing invoices to determine the next highest number and sets the default in Preferences to that number. This helps in preventing gaps in the numbering sequence.

The custom invoice-numbering feature is available in the ArchiOffice Professional and Enterprise editions only.

Payment Terms:
Defines the time period between the invoice generation date and the invoice due date. This will be used as the default for all new projects added to the system. The payment terms for any project can be changed in Projects-Billing- Options. If you do not see the option for your invoice terms, see the default contact terms preferences to modify the drop-down list.

Time/Expense Require Approval:
This is an optional workflow process that requires all project time and expense entries to be reviewed and approved by an authorized team member before being billed. This process is used as the default for all new projects added to the system.

This setting can be changed for a project by an authorized user via the Projects-Time/Expense screen.

Show Billing Header/Footer:
Select this check box if you want to use the header/footer logos specified for the system on all invoices, rather than printing them on your company letterhead.

Invoice Balance Due:
There are two options to determine which balance due calculation value is displayed on an invoice.

- **Show Project Balance:** This amount is based on the entire project balance due including unpaid invoices and previous payments.
- **Show Invoice Total:** This value is based on the amount due for a particular invoice.

This setting is used as the default for all new projects added to the system.

Timer Round to Minutes
Use this option to specify how the timer on the Time/Expense -Detail screen should work.

For example, if set to 15 minutes, running the timer for 1 minute would result in the start/stop times correctly reflecting 1 minute, but the Hours field would reflect 0.25 of an hour.
This is also a live option that will be referenced any time a timer is stopped on the Time/Expense Detail screen.

Expense Markup:
Specify a default expense markup to be used for all new projects, either by percentage or $ amount. The markup can be changed by an authorized user in the Projects-Billing-Options screen.

Billing Efficiency Target %:
Specify a billing efficiency target for all employees.

Billing Period:
Select a billing period from this drop-down list (that is, Day or Calendar Month).

Invoice Template:
Select the default template to use when creating invoices (that is, Invoice Type A or B). This setting is used for all new projects.

Invoice Output:
You have two output options:

- **PDF**: Choose to generate invoices in PDF using the selected invoice template (that is, Type A or B).
- **RTF**: Choose to generate invoices in an editable rich text format. Users will be able to override this setting at the project level by modifying a project's Billing - Options. This setting is used for all new projects.

Show Detailed Draft:
Select this option if you want to keep *Show Detailed Draft* option checked when creating a new project.

Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES-BILLING-BILLING CODES

Use the Preferences-Billing-Billing Codes screen to specify the properties of the billing codes or expense codes such as price, rates, markup, etc. These defaults pass on to the expense items when creating expenses.

Billing Codes

Name	Price	Cost Rate	Emp Reimb	Markup	Quantity
Airfare	$250.000	$200.000	☐	☑	1
Blueprinting	$0.000	0	☐	☐	1
Car Mileage	$0.550	0	☑	☑	1
Car Rental	$0.000	0	☐	☑	1
CD-Burning	$15.000	0	☐	☑	1
Color Print	$1.000	$0.250	☐	☑	1
Consultant	$0.000	0	☐	☐	1
Consultant: Civil	$0.000	0	☐	☐	1
Consultant: Landscape	$0.000	0	☐	☐	1
Consultant: Lighting	$0.000	0	☐	☐	1
Consultant: MEP	$0.000	0	☐	☐	1
Consultant: Structural	$0.000	0	☐	☐	1
Fax	$3.000	$0.150	☐	☑	1
FF&E	$0.000	0	☐	☐	1
Hotel	$0.000	0	☐	☑	1

Add Code
Click to add a new expense code.

Name:
Displays the name of an accounting code.

Price:
Displays the amount associated with the accounting code.

Cost Rate:
Specify the default cost rate for a selected code.

Employee Reimb:
Select this check box so employees are always reimbursed for a selected expense.

Markup:
Select this check box to automatically markup an expense.

Quantity:
Specifies the default number of units/items (for example, mileage, photocopies, etc.) to apply when this code is used.

Delete:
Click to delete a default expense type.

Button Panel

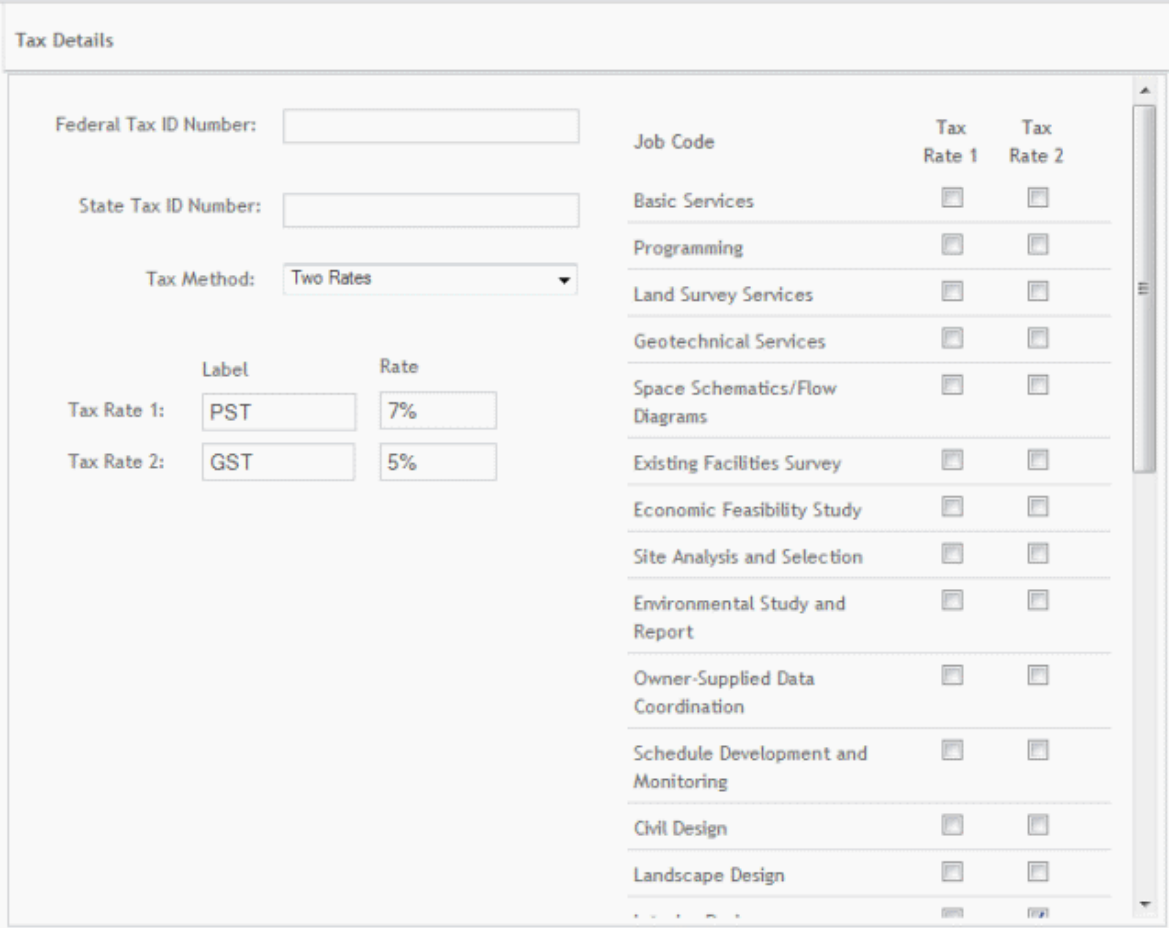
Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES-BILLING-TAX

Several tax models are available to support countries around the world. Use the Billing-Tax preferences to specify the tax model your firm uses, the labels that display for taxes on an invoice, and the rate to be used.

Changes to tax preferences only apply to new projects, not existing ones. To change the tax model for an existing project, navigate to the Projects -Billing-Options view and click the **Tax** tab.



Tax Details

Federal Tax ID No:
Enter you firm's Federal tax ID number in this field.

State Tax ID No:
Enter your firm's State tax ID number in this field.

Tax Method:
Select the default tax method to be applied to new projects from this drop-down list. The tax model can be changed for a project by an authorized user to one of the following: No Tax, Flat Rate, Two Rates or Slip Specific.

Options available on this screen vary based on the tax method selected.

- **No Tax**: Select if your firm does not apply a tax rate to its services.
- **Flat Rate**: Select this option to apply a flat tax rate to all services and expenses. Enter a tax rate label (for example, CA Sales Tax) and specify a rate.
- **Two Rates**: Select this option if your firm charges two different tax rates. You can apply one or both of these rates to job codes. Enter tax rate labels (for example, PST, GST, etc.) and specify the rates to be applied.
- **Slip Specific**: Select this option if your firm charges different tax rates by job code or time and expense. You can also establish default rates for all time and expense entries. Enter labels (for example, PST, GST, etc.) and specify the rates to be applied.

The Slip Specific method can also be used to have one tax rate for all time entries regardless of job code, and a different tax rate for all expense entries regardless of code. To do this, just leave the tax rate fields for the job code listings shown here, at 0.00%, and the *Time Slips* rate will be used for all time entries, and the *Expense Slips* rate will be used for all expenses.

Job Codes Grid

This list only displays when either the *Two Rates* or *Slip Specific* tax methods are selected.

- **Two Rates**: You can specify which job codes should have taxes applied to them as a default by selecting one or both of the tax rate check boxes for a job code.
- **Slip Specific**: When this tax method is selected, you can specify slip specific tax rates by job code. When the job rate codes are left empty, the default time and expense rates are used.

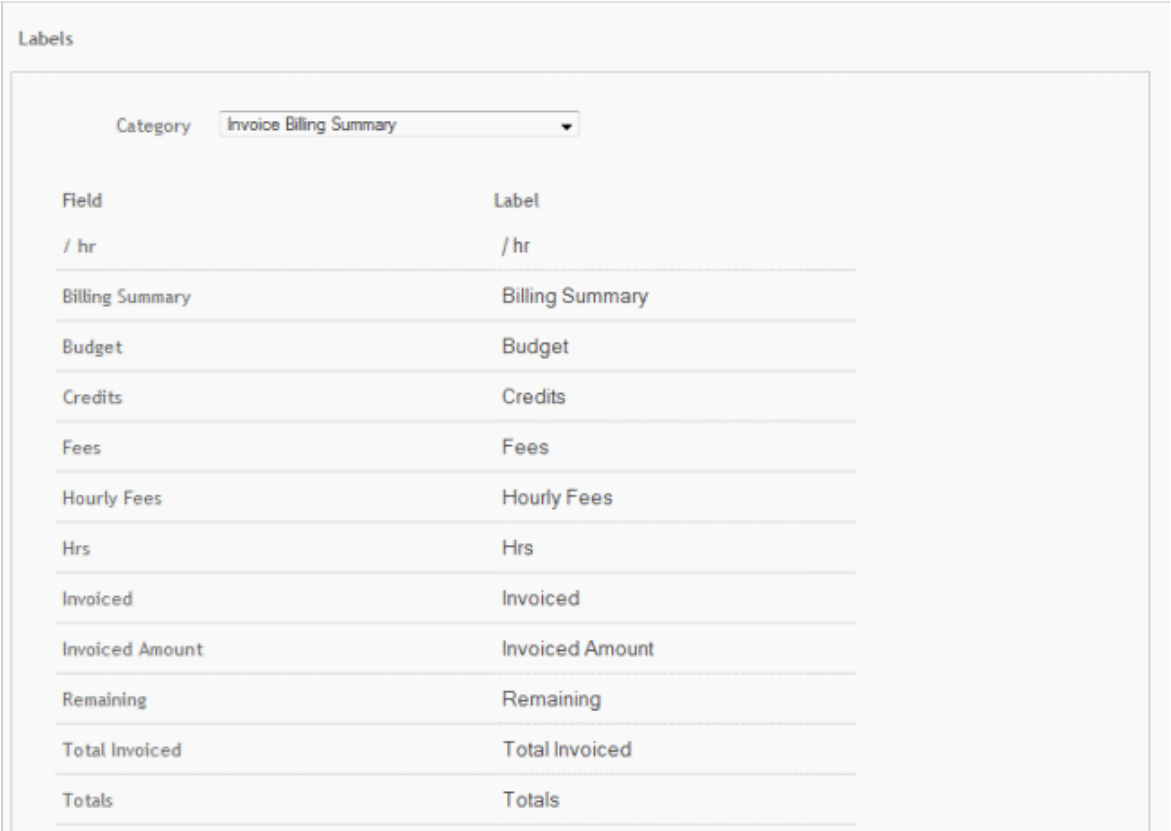
Button Panel

Save:
Stores your settings.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES-BILLING-LABELS

Use the Preferences-Billing-Labels screen to modify the billing labels, which display on invoices. This is broken down into categories for each section of the invoice. In addition to changing the name of the label, you can also rename it to the language of your choice.



Category
Select the section of the invoice to be modified (for example, Header, Summary, etc.).

Field:
Displays a list of data fields used on the invoice (for example, Totals, Hourly Fees, etc.).

The message in the invoice header's *Invoice Message* field can only be 100 characters long. Any message longer than this will not display on an invoice.

Label:
Customize the label of the field to be displayed on an invoice.

Button Panel

Save:
Stores your settings.

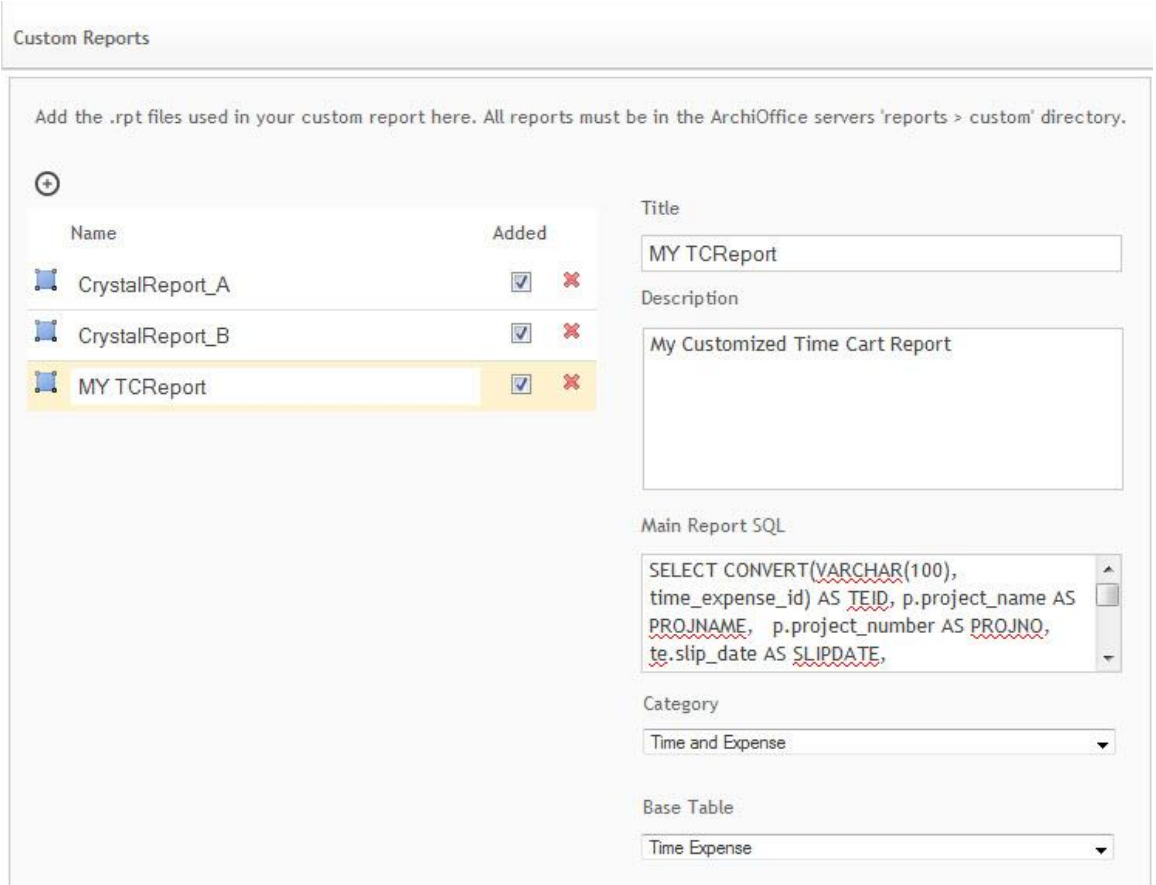
Help:
Opens the ArchiOffice Help in the Preferences section.

Custom

PREFERENCES-CUSTOM-REPORTS

The following information provides details about the Custom-Reports preferences used to add custom reports and make them available in the Reports module.

This feature is available in the ArchiOffice Pro and Enterprise editions only.



Add
Click to add a custom report file.

Name:
Enter a name for the report.

Added:
This check box is selected when a custom report is added. It indicates that the report is available for printing in the Reports module. Clear this check box if you do not want it to

display in the reports list in the Reports module. Clearing this option will also delete all associated memorized reports.

Title:
This title displays in the reports list in the Reports module.

Description:
The descriptive detail entered here displays when you select this report in the Reports module.

Main Report SQL:
This field displays the SQL code used when generating the custom report.

Category:
Specifies the category in which the custom report should display in the Reports module.

Base Table:
Specifies the search module used to find records to include in the generated custom report. For example, you would select Invoice for invoice reports; Transactions for payment, credit, and retainer style reports; Time Expense for time and expense reports; etc. The base table to select is typically included with the SQL code the BQE Custom Reports department sends with the custom report. If this detail is not included, contact the Customer Reports department for assistance (customreports@bqe.com).

Button Panel

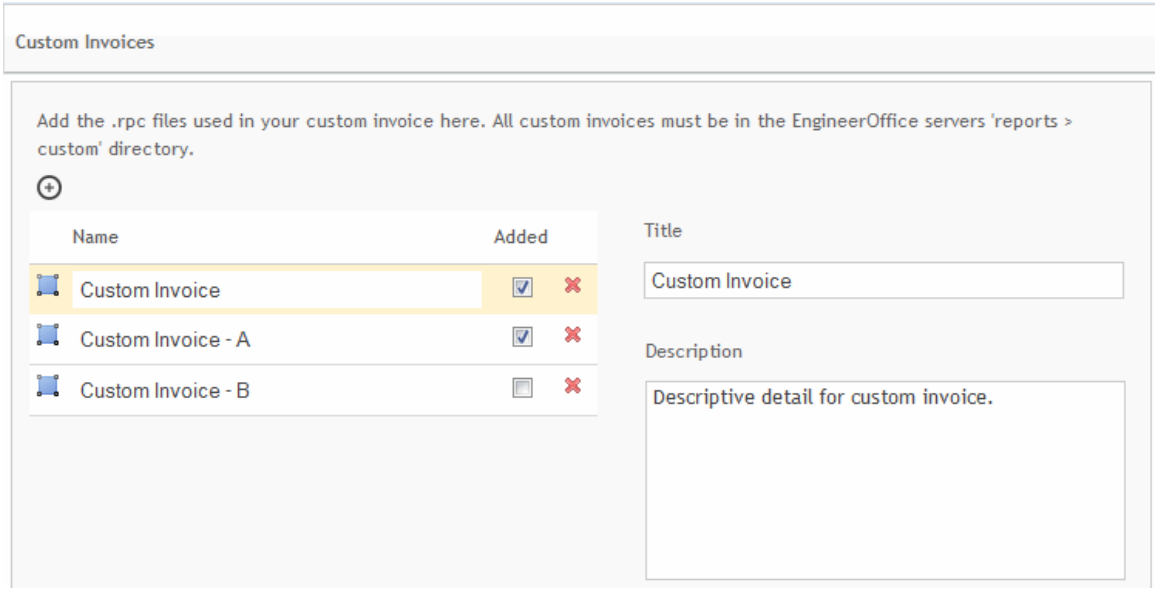
Save:
Stores your settings and adds the reports to the Custom folder.

Help:
Opens the ArchiOffice Help in the Preferences section.

PREFERENCES-CUSTOM-INVOICES

The following information provides details about the Custom-Invoices preferences used to add custom invoices and make them available as invoice templates when generating invoices.

This feature is available in the ArchiOffice Pro and Enterprise editions only.



Add
Click to add a custom invoice file (*.rpc).

Name:
Enter a name for the invoice.

Added:
When this check box is selected, it indicates that the invoice is available for use as a template when generating an invoice. Clear this check box if you do not want it to display on the invoice templates list on the Invoice Output tab of the Projects -Billing-Options screen or Billing -Defaults preferences.

Title:
This title displays in the invoice templates drop-down list.

Description:
Enter descriptive detail for the custom invoice in this field.

Button Panel

Save:
Stores your settings and adds the invoices to the Custom folder.

Help:
Opens the ArchiOffice Help in the Preferences section.

How Do I

HOW DO I ADD CUSTOM REPORTS?

If ArchiOffice standard reports do not meet your needs, you have the option of adding custom reports. These are created by the BQE Custom Reports department.

Contact the BQE Custom Reports department for details on having a custom report created.

When the BQE Custom Reports department creates a report for you, you will receive the custom report (*.rpt) and a text file (*txt) containing some SQL code. Locate these before beginning this process.

This feature is available in the ArchiOffice Pro and Enterprise editions only.

To add a customer report, do the following:

1. Save the custom report (for example, CA-Time By Detail.rpt) to your server.
2. In ArchiOffice, select **Preferences** from the *master* drop-down list.
3. Open the **Custom** folder and click **Reports**.
4. Click **Add** to select the custom report file (*.rpt).
5. Click the **Added** check box to make the report available for printing and click **Save**.
6. Edit the report title. By default, the report filename displays in this field. This title displays on the Reports screen.
7. Enter descriptive details.
8. Open the text (*.txt) file you received with the custom report and copy the SQL code into the *Main Report SQL* field.
9. In the *Category* drop-down list select the category (for example, Time and Expense) in which the custom report will be located in the list of standard ArchiOffice reports.
10. Select a base table, from the *Base Table* drop-down list. The base table to select is typically included with the SQL code the BQE Custom Reports department sends with the custom report. If this detail is not included, contact the Custom Reports Department for assistance.
11. Click **Save**. The report is now available for printing in the Reports screen.

HOW DO I ADD CUSTOM INVOICES?

ArchiOffice comes with two invoice templates to choose from when generating an invoice; Type A and B. If neither of these templates meets your needs, you can have a custom invoice template created for you.

This feature is available in the ArchiOffice Pro and Enterprise editions only.

Contact the BQE Custom Reports department for details on having a custom invoice created.

To add a custom invoice, do the following:

1. Select Preferences from the *master* drop-down list.
2. Open the **Custom** folder and click **Invoices**.
3. Click **Add** to select the custom invoice file (*.rpc).

4. After adding the invoice file, click **Select** for the invoice and edit the name as needed.
5. Click the **Add** check box to make the invoice available for use as a template when generating an invoice.
6. Click **Save**.
7. Edit the invoice title. By default, the invoice filename displays in this field. This title displays in the invoice templates drop-down list.
8. Enter descriptive details.
9. Click **Save**.

To use the custom invoice the next time you generate an invoice for a project, go to the Projects > Billing screen and click the Invoice Output tab. Select the custom invoice from the *Invoice Template* drop-down list.

Web Access

PREFERENCES - WEB ACCESS - URLS

ArchiOffice uses these settings to display driving directions and street level mapping when the user selects one of these options in the Contacts Detail View by default. The Web Access URL settings enable you to select another mapping service that comes pre-configured with ArchiOffice (that is, Map Quest and Yahoo Maps). You can also add a mapping service of your choice as the default for viewing maps and directions.

Default Mapping Web Site:
Select the preferred mapping website from the drop-down list. The default websites are Google Maps, Map Quest and Yahoo Maps.

Add New Item
Click to add a new mapping website. You will need the map and driving direction links for the mapping site you are adding.

Delete :
Click to delete an existing mapping website.

Name
Displays the name of the mapping website.

Map URL
This field displays the map URL for the currently selected mapping website.

Directions URL
This field displays the driving directions URL for the currently selected mapping website.

Help URL
Specify the URL of your ArchiOffice help. Click to open ArchiOffice help.

Button Panel

Save:
Stores your settings.

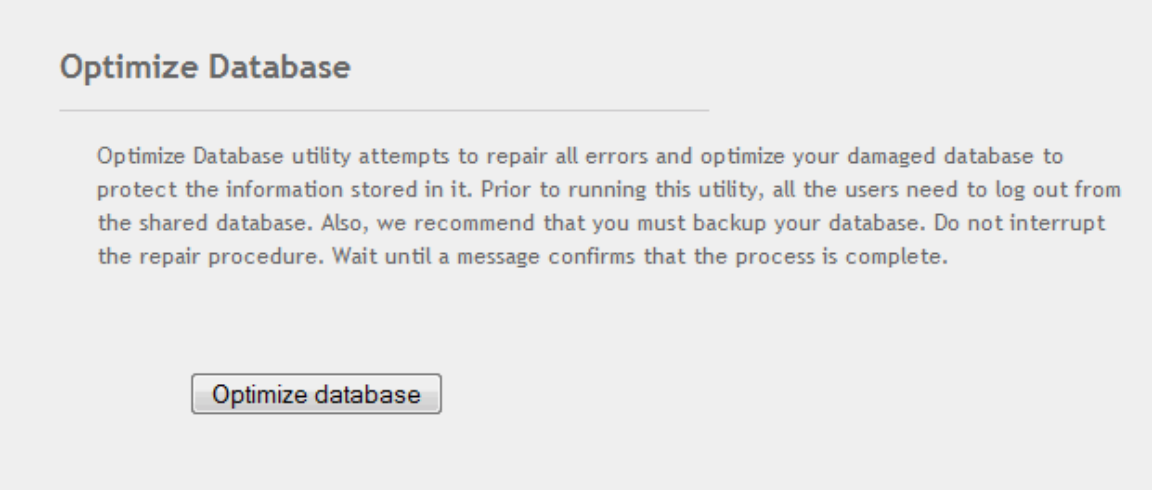
Help:
Opens the ArchiOffice Help in the Preferences section.

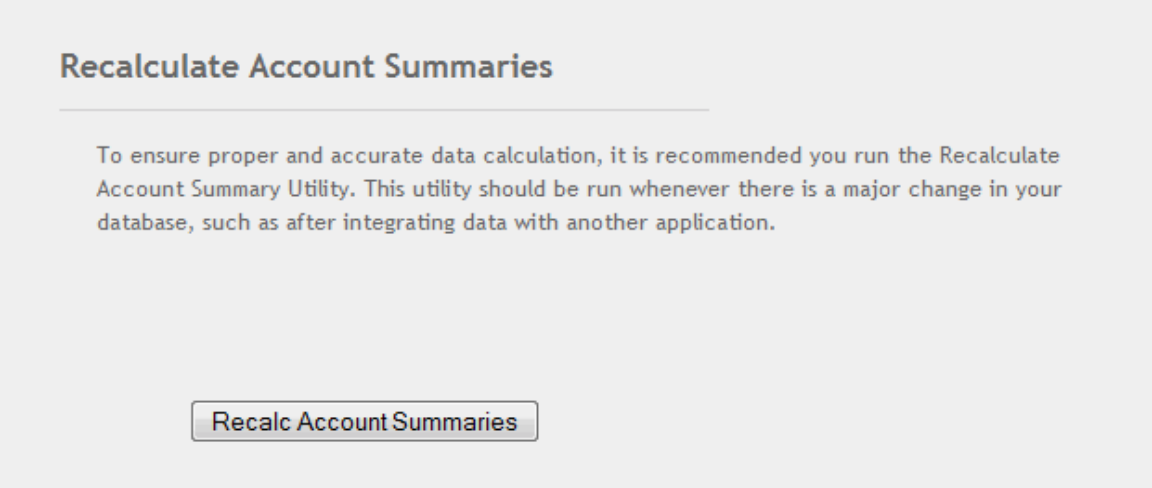
Utilities

PREFERENCES - UTILITIES - MAINTENANCE

ArchiOffice provides two utilities to help repair and optimize a damaged database to protect the information stored in it. Use them when the system is running slow or values are being calculated incorrectly.

⚠ We highly recommend that you back up your database prior to using the database utilities.





Optimize Database:
This tool attempts to repair all errors and optimize your damaged database to protect the information stored in it. Prior to running this tool, all the users need to log out from the shared database.

⚠ Do not interrupt the repair procedure and wait until a message confirms that the process is complete.

Recalculate Account Summaries:
Use this tool to ensure proper and accurate data calculation. Run it whenever there is a major change in your database, such as after integrating data with another program.

Button Panel

Save:
Stores your settings.

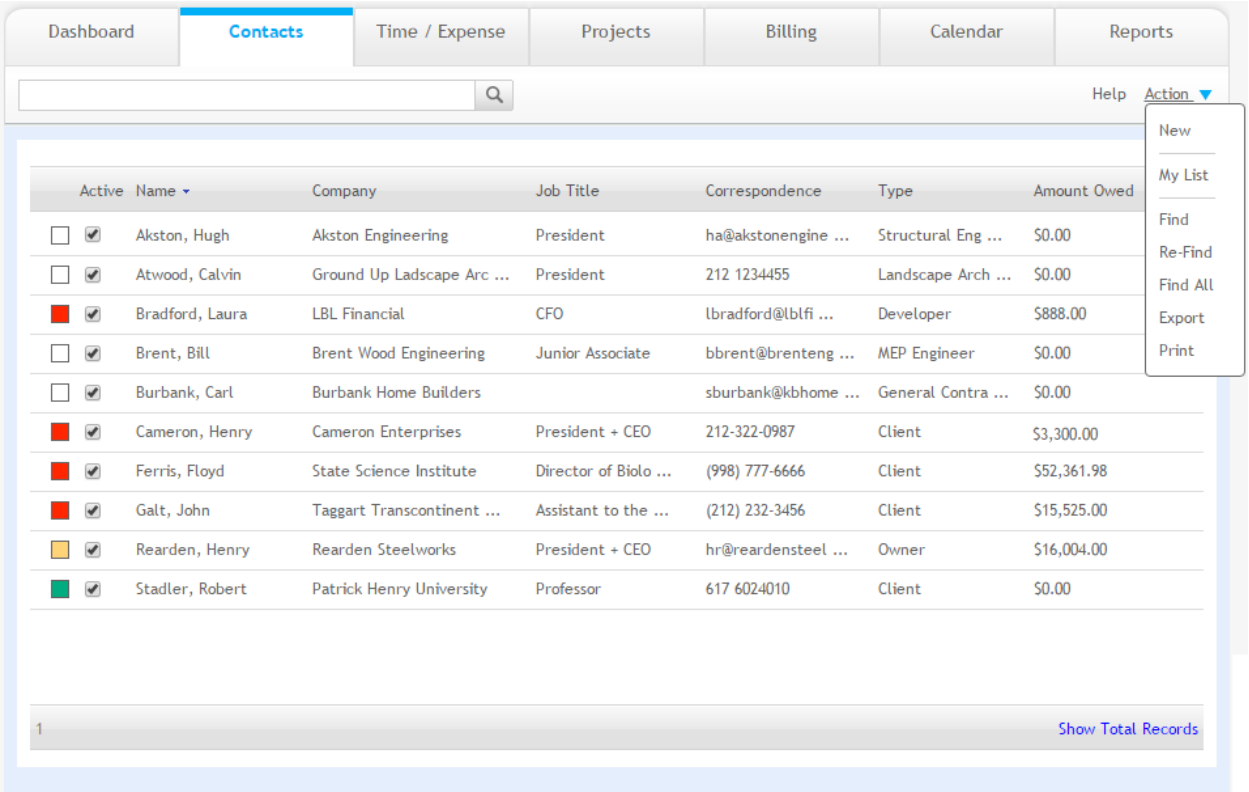
Help:
Opens the ArchiOffice Help in the Preferences section.

CONTACTS

Reference

CONTACTS LIST VIEW

The Contacts list view shows a list of contacts in the ArchiOffice system.



Grid

Information shown in the grid includes full name, company name, job title, contact type, correspondence and amount owed.

How the contact displays is determined by the Preferences -Contact-Formats settings.

This grid also displays which Contacts have projects setup in the system. The list is color-coded to indicate a contact's billing status. You can see if a contact is a billable client and if they owe money to your company.

Status	
☐	White indicates a regular contact.
■	Yellow indicates a contact having a billing address (billing client) and owing you money (unpaid invoices but not past due)
■	Green indicates a client with no unpaid invoices.
■	Red indicates a contact having outstanding invoices (unpaid invoices past due).

To see a quick tool-tip, hover your mouse pointer on the color-coded boxes.

Edit:
Click a listed contact to view record details.

Delete :
Click to delete contacts appearing in the list view.

Sort:
Any column header can be selected to sort information by that category.

Active Status:
Users can include or exclude contact records from their My List by selecting or clearing the *Active* check box for an individual contact in the list.

Show Total Records:
Click this to display the total number of records in the Contacts list.

Button Panel

Search :
Use this search field to locate contacts quickly. The field's predictive search instantly display results as you type in this field.

Help:
Opens the ArchiOffice Help in the Contacts section.

Action

New:
Select this option to create a new contact record.

My List:
Select to view a list of contacts you designated as active.

Find:
Select to locate contacts matching specific criteria. The resulting Found Set displays in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

Find All:
Select to view all contacts in the system.

Export:
Click to export the data from the ArchiOffice Contacts List screen to a .csv file.

Print:
Select this option to print a report of records displayed in the list view.

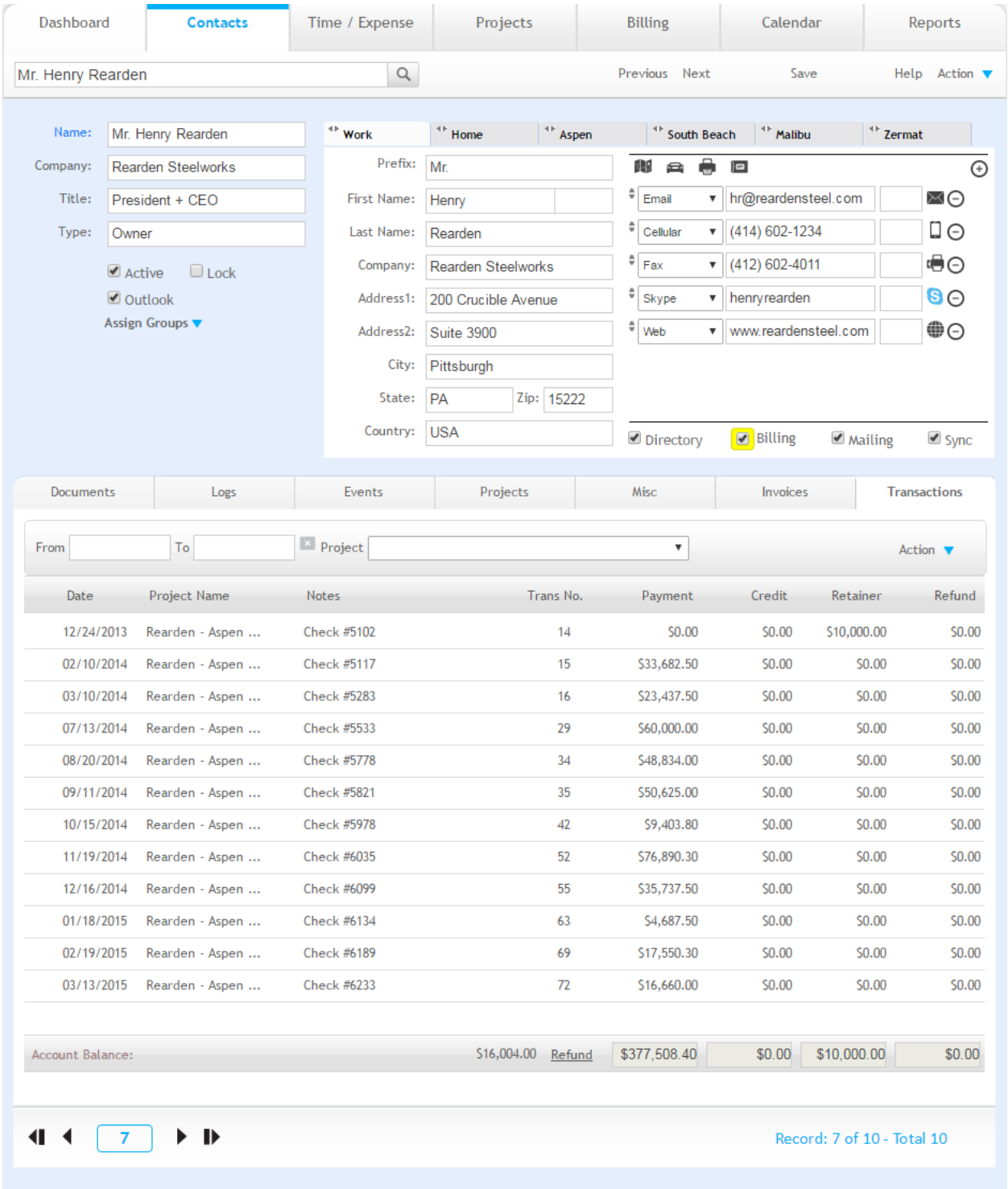
CONTACTS DETAIL VIEW

This screen is used to maintain a profile of a contact. You can customize the information to meet your company's unique needs. Profiles can be created for firm employees, clients and vendors.

When a new contact is created, default options set in the Preferences > Contacts > Defaults screen apply, including the order of the address tabs on it.

Information entered on this screen is used on reports or invoices and can be used when determining rates on time and expense entries or budgets. You can view, edit and create contact profiles on this screen.

ArchiOffice gives you the flexibility of creating multiple tabs of information to correspond to different address types (for example, Home, Work, etc.). You can add up to six addresses for each contact. Address tabs can be renamed and re-ordered as needed.



Name:
Enter a contact's full name in this field.

Company:
The name of the contact's company. The same name pre-fills the Company field on the Work tab.

Title:
The contact's job title, the title entered will be added as a drop-down list item. You can use the title as a filter to simplify reporting and data management.

Type:
Specify a contact type using this drop-down list. A contact can be an employee, a client, a vendor or any specific type. The type list is set in the Preferences > Contacts > Defaults screen and can be customized to suit your needs.

Active:
Select this check box to include this contact on your active list of contacts (My List view).

Outlook/Entourage/Apple Contacts:
Select this check box to have a contact sync with your external program (Microsoft Outlook/Entourage/Apple Contacts). You will need to designate which address tab should be used by checking the Sync check box.

Lock:
Select this check box to prevent restricted users from modifying this record.

Assign Groups:
Groups provide for additional categorizing of contacts to later filters for reporting and printing purposes. The group check boxes are defined by the administrator in the Preferences > Contacts > Defaults screen.

Contact Information Tabs

Contact information can be organized into various address types (for example, Work, Home and other information) that you might want to maintain for the contact. Default address types can be specified using the Preferences > Contacts > Defaults screen. The following fields are available on each tab:

You can reorder the address tabs. First, click on the tab to be moved. Next, click on the tab in the target location (tab being repositioned).

The primary contact method (for example, phone number) of a record's first tab displays in the *List of Contacts*.

Prefix:
The contact's salutation (for example, Mr., Mrs., Dr., etc.). You can either type it or select from the drop-down list.

First and Last Name:
These fields are automatically populated after entering the contact's full name in the *Name* field on the left side of the screen.

Company:
Enter the contact's company in this field. This field is automatically populated after entering the company name in the *Company* field on the left side of the screen.

Address 1 and 2:
Two lines are available to enter contact's street name, apartment number, etc.

City:
The contact's city.

State:
Select the contact's state or province from this drop-down list.

Zip:
The contact's zip or postal code.

Country:
The contact's country or region.

Directory:
Select this check box on the address tab that should be used in the Directory reports.

Billing:
Select this check box on the Address tab that should be used for billing purposes. This is the address where any invoices generated for this client are sent.

This box is color-coded, indicating the contact's billing status. Click here for more details.

Status	
	White indicates a regular contact.
	Yellow indicates a contact having a billing address (billing client) and owing you money (unpaid invoices but not past due)
	Green indicates a client with no unpaid invoices.
	Red indicates a contact having outstanding invoices (unpaid invoices past due).

Mailing:
Select this check box on the address tab where mailings should be sent.

Sync:
Select this check box to identify which of the address tabs should be used for synchronization with an external program (Microsoft Outlook/Entourage/Apple Contacts).

This is a global setting that applies to all users. You have a choice if you want this contact in your external program using the **Outlook** check box but the address that will be used will be the same for all users that sync with this contact, as defined by the Sync check box.

Add New Address Tab

Click to add or rename existing tabs.

Double click on an active tab to rename it.

In case of long address names, simply hover over the tab to view the full name.

Print Envelopes
Click to print envelopes using the address specified here.

Print Address Labels
Click to print address labels using the address specified here.

Display Street Map
Click to view a street map showing the contact's location.

Display Driving Directions
Click to view driving directions to a contact's location.

The street map and directions are displayed using the mapping service specified using the Preferences -Web Access screen.

Communication Methods

This section shows communication options (for example, Phone, email, pager, cellular, fax, Skype, etc.) you can use to reach contacts. Click the desired icon to the right of an item to initialize communication using the entered contact information. For example, when you click Email, your external email program (for example, Microsoft Outlook/Entourage/Apple Mail) starts. The list of default communication types is set up in Preferences > Contacts > Defaults.

To change the order of the listed communication methods, click for the communication method to be moved. The color changes to green. Next, click for the other item to be moved.

Portals

The portals, located below the contact information, show related Documents, Logs, Events, Projects, Miscellaneous detail, Invoices and Transactions for a contact from other parts of the system.

Button Panel

Previous:
Click to display the previous contact record.

Next:
Click to display the next contact record.

Save:
Click to save changes made to a contact's record.

Help:
Opens the ArchiOffice Help in the Contacts section.

Action

New:
Select to create a new contact.

Duplicate:
Select to duplicate an active contact record.

Delete:
Select to delete a contact record from ArchiOffice. This is a secure privilege available only when specifically allowed in the Preferences screen' security option.

Export:
Click to export the data from the first address tab to a tabular format in a .csv file.

Add:
Select this option to add the contact's flagged synchronization address to your external program (for example, Outlook).

View:
Select to display the contact in your external program.

My List:
Select to view contacts assigned to you.

Find:
Use this option to locate Contacts matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

Find All:
Select to view all contacts.

CONTACTS-DOCUMENTS

This portal shows a chronological history of all contact related documents. Documents associated to contacts or projects reside on the file server. You can access them directly from the portal, provided you have the program necessary to open the document (for example, Adobe Reader, Microsoft Word, etc.).

Documents Grid View

Edit:
Click the row to edit or view details of the selected document.

Delete ⊖:
Click ⊖ to remove the selected item from the portal.

Sort:
Any column header can be selected to sort information by that category.

Documents Button Panel

Filter
Use the filters on the button panel to narrow the list on basis of file type, project and the user that created it.

Action

Help:
Opens the ArchiOffice Help in the Contacts section.

New:
Select this option to create a new document.

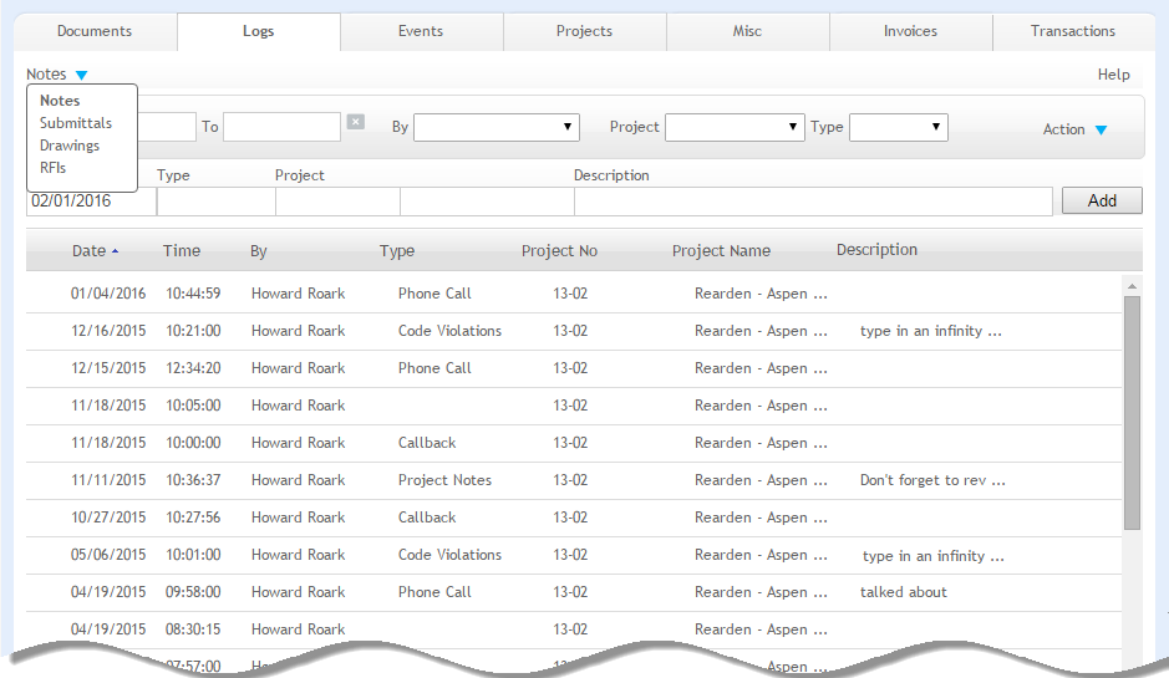
List:
Select to view all contact documents.

Find:
Select this option to search for documents associated with this contact resulting in a Found Set displayed in the Documents List View.

Logs

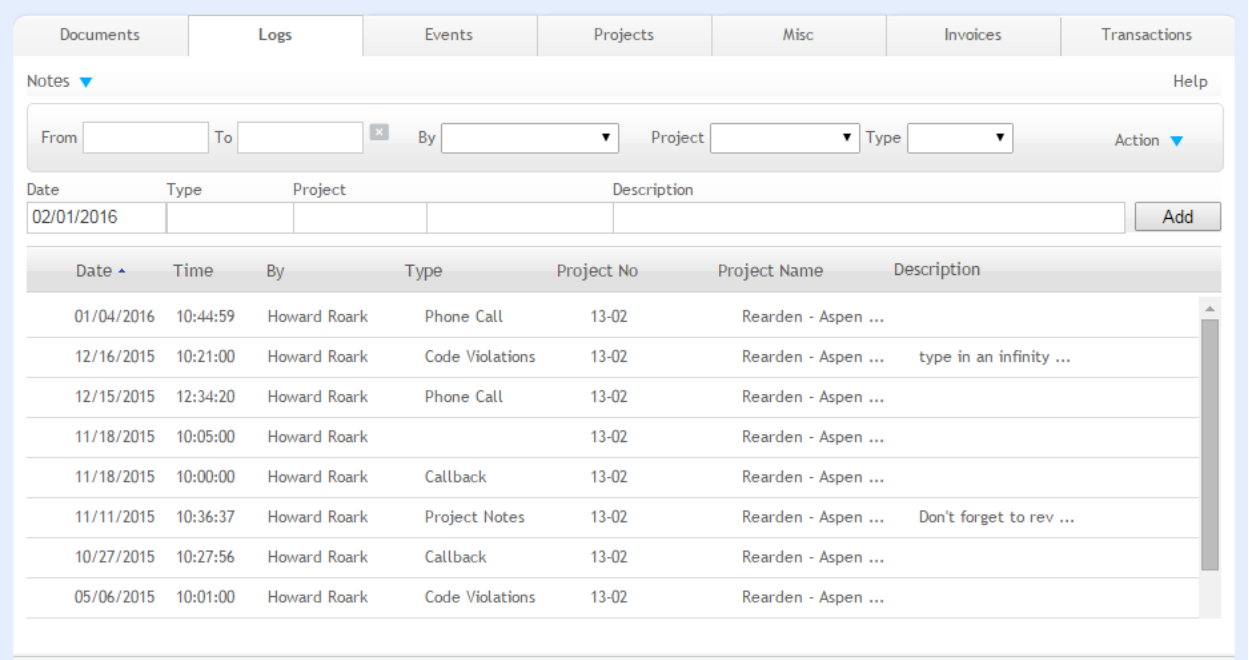
CONTACTS-LOGS OVERVIEW

Use the Contacts-Logs portal to view a chronological history of all Notes, Submittals, Drawings and RFIs associated with a contact and related projects. You can access the corresponding list of items (for example, notes or submittals) by making a selection from the drop-down list.



CONTACTS-LOGS-NOTES

This portal shows a chronological history of all notes associated with a contact's related projects. To access it, in the Contacts Detail View, select **Notes** from the Logs tab's *Action* drop-down list.



Add:
Click this button to add additional notes.

Grid

Date:
The date on which the note was created.

Time:
The time the when the note was added.

By:
Person who has created the notes.

Type:
The type of note (for example, phone call, callback, test log, etc.).

Project No.:
The project number whose notes appear in the grid.

Project Name:
The name of the project associated with the notes.

Description:
A brief description giving a general idea about the note.

Edit:
Click the row to view or edit note details.

Delete ⊖:
Click ⊖ to remove the selected item from the portal.

Sort:
The list can be sorted by clicking the column headers.

Button Panel

Help:
Opens the ArchiOffice Help in the Contacts section.

Filters:
Use the portal filters to narrow the list of items displayed in the portal.

From-To:
These fields limit the notes displayed in the grid to those that fall within the date range specified.

By:
This field limits the notes displayed in the grid to those created by the specified person.

Project:
Make a selection from the drop-down list to specify the project whose notes you want to view.

Type:
Filter the notes by specific type (for example, phone call, callback, test log, etc.).

Action

New:
Select this option to add new notes.

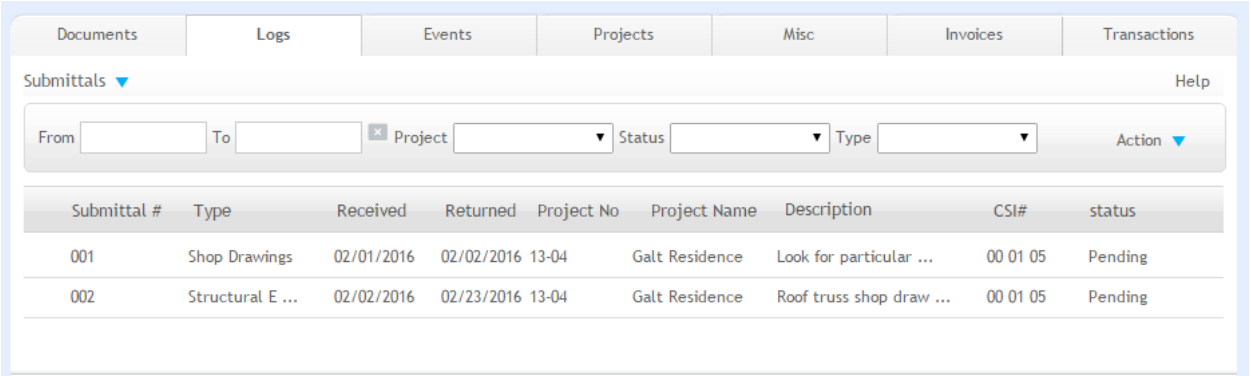
List:
Select to view all notes.

Find:
Select this option to search for notes associated with a contact.

CONTACTS-LOGS-SUBMITTALS

This portal shows a chronological history of all submittals associated with a contact's related projects. While viewing a contact's record, select **Submittals** from the Logs *Action* drop-down list to view the corresponding list of items.

This feature is only available in the ArchiOffice Enterprise edition.



Grid

Submittal #:
Displays a number for the submittal record. This number should not exceed 10 characters.

Type:
The type of document or material submitted for approval, say Shop Drawings.

Received:
Displays the date on which the submitted material or drawing was received.

Returned:
The date on which the submittal was returned to the person who submitted it for approval.

Project No.:
The project number whose submittal record appears in the grid.

Project Name:
The name of the project associated with the submittal record.

Description:
Descriptive detail for the submittal record.

CSI #:
This is the Code Structure Identifier (CSI) number associated with the submitted drawing or material.

The type of CSI code that displays is configured in Preferences-Project-Submittals.

Status:
Displays the submittal status - pending, rejected, revise and resubmit, or approved with corrections noted.

Edit:
Click the row to view or edit the submittal information.

Delete :
Click to remove the selected item from the portal.

Sort:
The list can be sorted by clicking the column headers.

Button Panel

Help:
Opens the ArchiOffice Help in the Contacts section.

Filters:
Use the portal filters to filter the information displayed on the screen.

From-To:
These fields limit the submittal records displayed in the grid to those that fall within the date range specified.

Project:
Make a selection from the drop-down list to specify the project whose submittals you want to view.

Status:
Displays submittal based on the specified status.

Type:
Make a selection from this drop-down list to specify the type of submittals you want to view in the grid.

Action

New:
Select this option to add a new submittal.

List:
Select to view all submittal records.

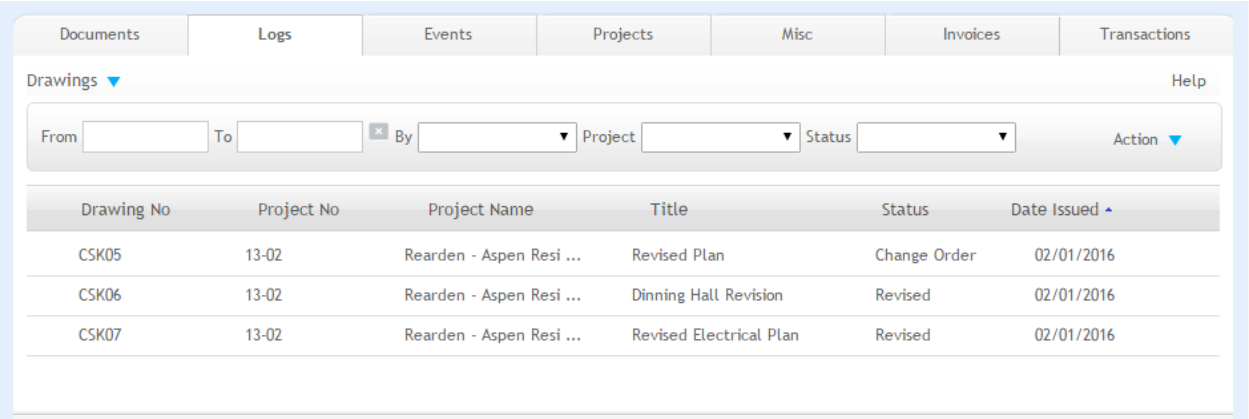
Find:
Select this option to search for submittals associated with this contact.

CONTACTS-LOGS-DRAWINGS

This portal displays a chronological history of all drawings associated with a contact.

To access it, in the Contacts Detail View, select **Drawings** from the *Logs* tab's Action drop-down list.

This feature is only available in the ArchiOffice Enterprise edition.



Grid

Drawing No.:
The date on which the drawing was released for review.

Project No:
The project number associated with the drawing.

Project Name:
The name of the project associated with the drawing.

Title:
Displays the title of the drawing.

Status:
Status of the drawing (for example, Revised, Change Order, etc.).

Date Issued:
The date on which the drawing was released for review.

Edit:
Click the row to view or edit the drawing information.

Delete ⊖:
Click ⊖ to remove the selected item.

Sort:
The list can be sorted by clicking the column headers.

Button Panel

Help:
Opens the ArchiOffice Help in the Contacts section.

Filters:
Powerful portal filters can be used to narrow down the information displayed.

From-To:
These fields limit the drawings displayed in the grid to those that fall within the date range specified.

By:
Filter by the person who has created the drawings.

Project:
Make a selection from the drop-down list to specify the drawings associated with the specified project.

Status:
Select a status for the drawing to be displayed in the grid from this drop-down list (for example, Revised, Change Order, etc.).

Action

New:
Select this option to add new drawings.

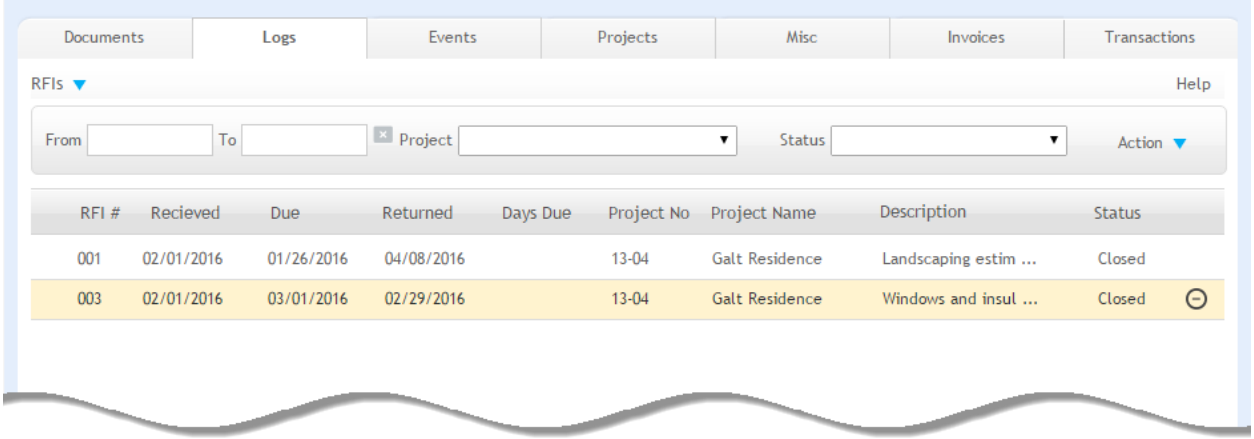
List:
Select to view all drawings.

Find:
Select this option to search for drawings.

CONTACTS-LOGS-RFIS

This portal shows a chronological history of all RFIs associated with a contact record. While viewing a contact's record, select **RFIs** from the Logs *Action* drop-down list to view the corresponding list of items.

This feature is only available in the ArchiOffice Enterprise edition.



Grid

RFI #:
Displays the RFI number to the selected project RFI.

Received:
Displays the date on which the RFI was received.

Due:
Displays the date on which a response is due for the RFI.

Returned:
Displays the date on which the requested information is delivered.

Days Due:
Number of days the RFI has been overdue. It depends on the Due Date and Date Returned selected.

Project No.:
The project number whose RFI record appears in the grid.

Project Name:
The name of the project associated with the RFI record.

Description:
The descriptive detail for the RFI.

Status:
The current status of the RFI. The status can be open or closed.

Edit:
Click the row to view or edit the RFI information.

Delete ⊖:
Click ⊖ to remove the selected item from the portal.

Sort:
The list can be sorted by clicking the column headers.

Button Panel

Help:
Opens the ArchiOffice Help in the Contacts section.

Filters:
Use the portal filters to display selective information on the grid.

From-To:
These fields limit the RFI records displayed in the grid to those that fall within the date range specified.

Project:
Make a selection from the drop-down list to specify the project whose RFIs you want to view in the grid.

Action

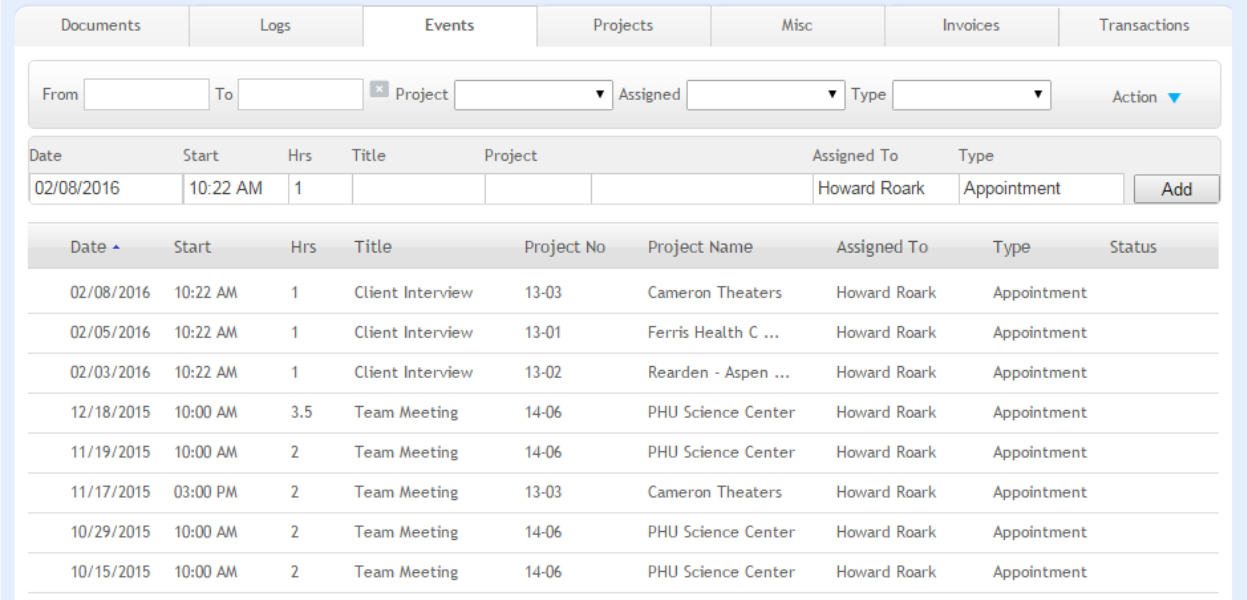
New:
Select this option to add a new RFI.

List:
Select to view all RFI records.

Find:
Select this option to search for RFIs associated with this contact.

CONTACTS-EVENTS

This portal shows a chronological history of all events to which a contact has been assigned.



Grid

Date:
Displays the date of the scheduled event.

Start:
Displays the event's start time.

Hrs:
Specifies the duration in hours of the scheduled event.

Title:
Displays the event name, say Team Meeting.

Project No:
Displays the project number for which the event is scheduled.

Project Name:
Displays the name of the project for which the event is scheduled.

Assigned To:
Specifies the contact name attending the event or to whom the event is assigned.

Type:
Displays the type of event scheduled (i.e., To-Do, Milestone or Appointment).

Status:
Status of the event, say Pending, Completed, etc.

Add:
Click to add additional events.

Edit:
Click the row to edit or view details of the selected event.

Delete ⊖:
Click ⊖ to delete the selected event.

The listed events can be sorted by clicking the column headers.

Button Panel

Filters
Narrow the displayed list using the available filters in this section.

From-To:
These fields will limit the event records displayed in the grid to those that fall within the date range specified.

Project:
Make a selection from the drop-down list to view the events of that specific project.

Action

Help:
Opens the ArchiOffice Help in the Contacts section.

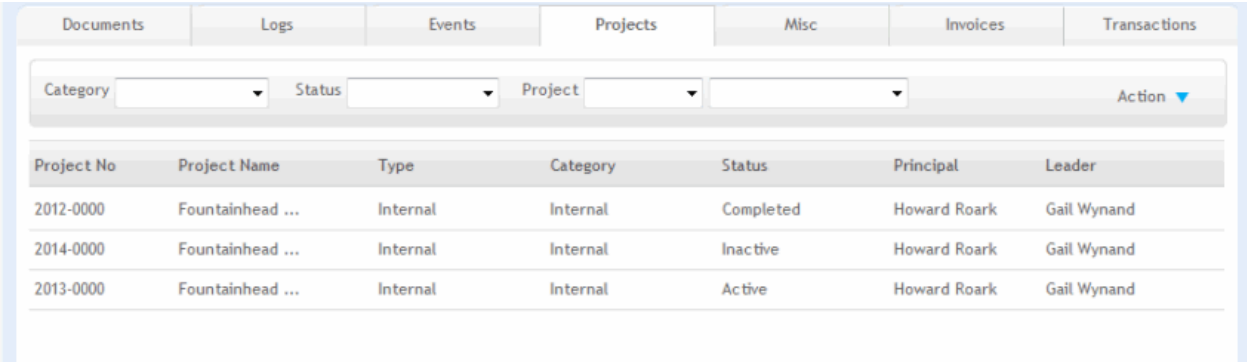
New:
Select to add a new event.

List:
Select to view a list of all events.

Find:
Select to access the Event Search Request screen to find events.

CONTACTS-PROJECTS

Use this portal to view a chronological history of a contact's projects. You can add new projects via this portal or drill-down to view details of listed projects.



Grid

Project No:
Displays the project number associated with the contact. The Project Number is created when the project is created.

Project Name:
The name of the project associated with the contact.

Type:
Type of the project, such as Residential, Commercial, etc.

Category:
The type of work done on a project and its category-Billable, RFP or Internal.

Status:
Specifies the status of the project-Active, Inactive, Cancelled, Completed, Awarded and so on.

Principal:
Displays the employee assigned with the role of a Principal for the project.

Leader:
Displays the employee responsible for leading the project.

Edit
Click a row to view or edit the detail of a project.

Delete
Click to delete a selected item from the portal.
Sort
Click a column header to sort the grid by the information in that column.

Button Panel

Filter
Use the **Category** and **Status** portal filters to show only projects matching your filter criteria.

Action

Help:
Opens the ArchiOffice Help in the Contacts section.

New:
Select to create a new project for a contact.

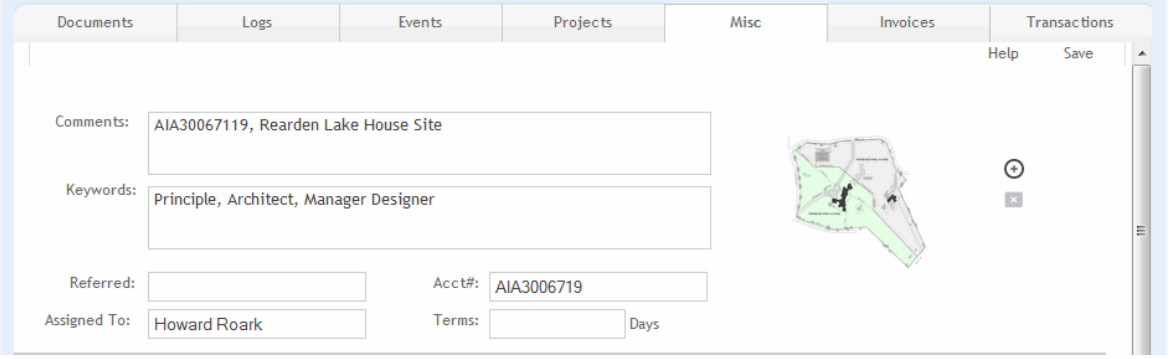
Add:
Select to assign a contact to a project selected in the *Project* drop-down list on the button panel. The contact is added to the project's contact list.

List:
Select to view all the projects to which you have assigned.

Find:
Select to locate a particular project and return a Found Set displaying the results in a List View.

CONTACTS-MISC

Use the Contacts-Misc screen to track additional information on contacts. You can include keywords for each contact record to be used on the Contact Search screen to find contacts quickly. You can also add an image here.



Comments:
Enter descriptive detail or notes in this field.

Keywords:
Entries in this field can be used for quick searches based on keyword criteria. Any number of keywords can be entered, separated by a space, for quick searching.

Referred:
Specify who referred a contact to you.

Assigned To:
Designate which of your Employees is responsible for this Contact.

Acct#:
Enter an account number for the project.

Terms:
Enter custom terms for a specific contact in this field. Any project created with this contact as its billing client will inherit this setting for payment terms. Terms entered here override the default Terms value set in Preferences -Billing-Defaults.

If this field is blank at the time of project creation, then the standard default term applies.

Photo ⊕:
Add a photo of the contact by clicking ⊕.

Secondary Images and Secure Notes:
Add an additional image or secure note about this contact. Enter confidential or classified information in the secure notes field. This field does not display for users who have not been granted the *Secure Project Notes* privilege. See Preferences-Users-Security for further details on security and privilege settings.

Button Panel

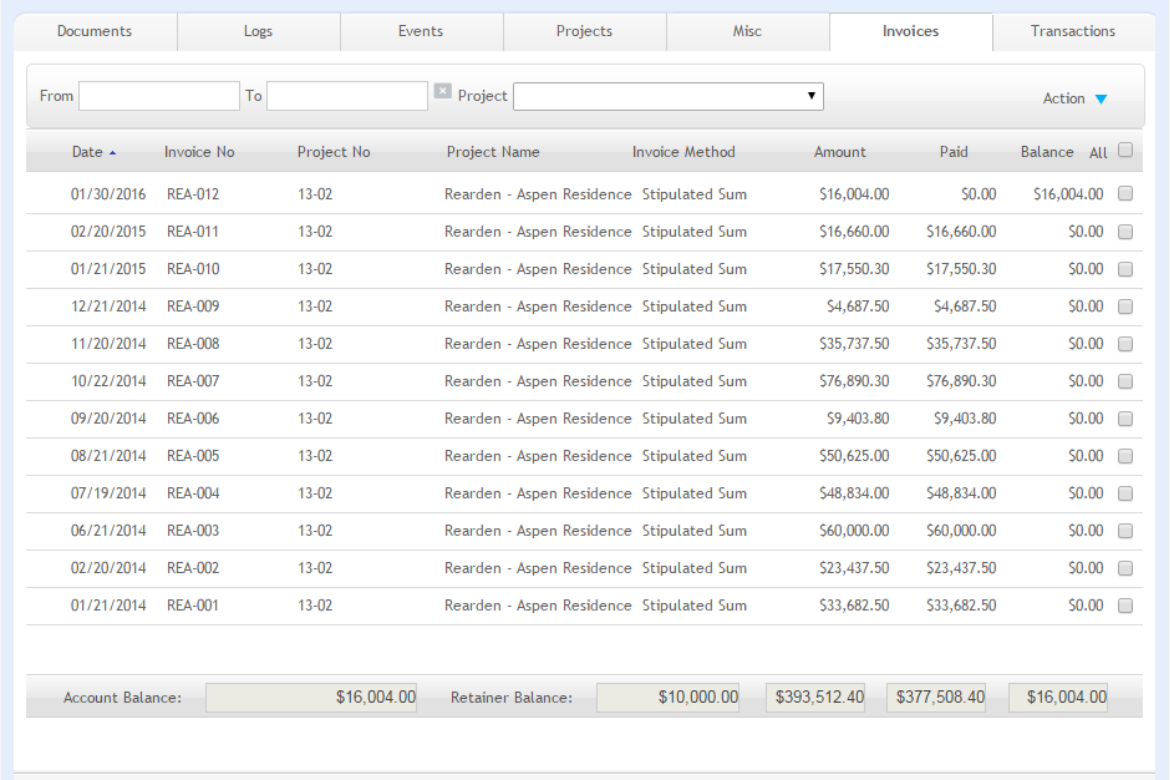
Help:
Opens the ArchiOffice Help in the Contacts section.

Save:
Click to save your settings.

CONTACTS-INVOICES

The Contacts-Invoices portal shows all invoices generated for a contact's projects. You cannot create invoices for internal projects, as they are non-billable, or for RFPs.

This portal only displays invoices for contacts flagged as clients and are designated as *Billing Clients* on the Contacts Detail View.



Date	Invoice No	Project No	Project Name	Invoice Method	Amount	Paid	Balance
01/30/2016	REA-012	13-02	Rearden - Aspen Residence	Stipulated Sum	$16,004.00	$0.00	$16,004.00
02/20/2015	REA-011	13-02	Rearden - Aspen Residence	Stipulated Sum	$16,660.00	$16,660.00	$0.00
01/21/2015	REA-010	13-02	Rearden - Aspen Residence	Stipulated Sum	$17,550.30	$17,550.30	$0.00
12/21/2014	REA-009	13-02	Rearden - Aspen Residence	Stipulated Sum	$4,687.50	$4,687.50	$0.00
11/20/2014	REA-008	13-02	Rearden - Aspen Residence	Stipulated Sum	$35,737.50	$35,737.50	$0.00
10/22/2014	REA-007	13-02	Rearden - Aspen Residence	Stipulated Sum	$76,890.30	$76,890.30	$0.00
09/20/2014	REA-006	13-02	Rearden - Aspen Residence	Stipulated Sum	$9,403.80	$9,403.80	$0.00
08/21/2014	REA-005	13-02	Rearden - Aspen Residence	Stipulated Sum	$50,625.00	$50,625.00	$0.00
07/19/2014	REA-004	13-02	Rearden - Aspen Residence	Stipulated Sum	$48,834.00	$48,834.00	$0.00
06/21/2014	REA-003	13-02	Rearden - Aspen Residence	Stipulated Sum	$60,000.00	$60,000.00	$0.00
02/20/2014	REA-002	13-02	Rearden - Aspen Residence	Stipulated Sum	$23,437.50	$23,437.50	$0.00
01/21/2014	REA-001	13-02	Rearden - Aspen Residence	Stipulated Sum	$33,682.50	$33,682.50	$0.00

Account Balance:	$16,004.00	Retainer Balance:	$10,000.00	$393,512.40	$377,508.40	$16,004.00

Grid

Date:
Date when the invoice was created.

Invoice No:
Displays the invoice number.

Creating a draft invoice or deleting it does not increment your next invoice number until that invoice is finalized. When draft invoices are finalized, ArchiOffice looks at the invoice numbers of all existing invoices to determine the next highest number and sets the default in Preferences to that number. This helps in preventing gaps in the numbering sequence.

Project No:
Project or job number associated with the invoice.

Project Name:
Displays the name of the project or job associated with the invoice.

Invoice Method:
Displays the billing method used for the project (i.e., Hourly Rate, Stipulated Sum, Multiple of DSE/DPE, Percent of Construction, or Unit Cost).

Amount:
This displays the invoice amount based on the services, expenses, adjustments and taxes applicable to it.

Paid:
Displays the amount paid toward the invoice, if any.

Balance:
This displays the balance amount that the client owes on the invoice.

Edit:
Click the row to view or edit an invoice.

Sort:
Click any column header to sort the grid by the information in that column (for example, project name).

Button Panel

Filter
Use the filters to display selective invoices on the grid. Click Clear to undo the filters.

> **From-To:**
> These fields limit the invoice records displayed in the grid to those that fall within the date range specified.

Project:
Make a selection from the drop-down list to view the invoices of the specified project.

Action

Help:
Opens the ArchiOffice Help in the Contacts section.

New
Select to create a new invoice for a contact.

List:
Select to view all list of all invoices.

Find
Select to locate a specific invoice and return a Found Set displaying the results in a List View.

Email Selected Invoices:
Click to email the invoices selected on the grid to the clients. It opens the Email screen.

Print:
Displays the invoice statement by client, which you can preview and print.

CONTACTS-TRANSACTIONS

The Contacts-Transactions portal shows a chronological history of all transactions (that is, payment, credits, retainer deposits and refunds) issued for all projects associated with a contact.

This portal is only visible if the contact is flagged as a client and has the Billing check box selected on the Contacts Detail View.

Documents | Logs | Events | Projects | Misc | Invoices | Transactions

From To Project Action

Date	Project Name	Notes	Trans No.	Payment	Credit	Retainer	Refund
01/30/2016	Galt Residence	Check #3597	67	$7,650.00	$0.00	$0.00	$0.00
01/05/2015	Galt Residence	Check #3516	60	$7,125.00	$0.00	$0.00	$0.00
12/11/2014	Galt Residence	Check #3497	57	$11,812.50	$0.00	$0.00	$0.00
11/16/2014	Galt Residence	Check #3423	49	$63,950.00	$0.00	$0.00	$0.00
10/20/2014	Galt Residence	Check #3356	44	$19,500.00	$0.00	$0.00	$0.00
09/14/2014	Galt Residence	Check #3278	38	$18,000.00	$0.00	$0.00	$0.00
08/17/2014	Galt Residence	Check #3187	32	$7,500.00	$0.00	$0.00	$0.00
07/14/2014	Galt Residence	Check #3052	27	$13,500.00	$0.00	$0.00	$0.00
05/06/2014	Galt Residence	Check #2987	25	$96,500.00	$0.00	$0.00	$0.00
03/10/2014	Galt Residence	Check #2835	23	$56,000.00	$0.00	$0.00	$0.00
02/09/2014	Galt Residence	Check #2505	22	$30,345.00	$0.00	$0.00	$0.00
12/24/2013	Galt Residence	Check #2489	21	$0.00	$0.00	$5,000.00	$0.00
Account Balance:			$15,525.00 Refund	$331,882.50	$0.00	$5,000.00	$0.00

Grid

Date:
Displays the date on which the transaction was made.

Project Name:
Specifies the name of the project that is associated with the transaction.

Notes:
Displays the comments or descriptive details saved with the transaction.

Transaction No:
Specifies the number for the currently displayed transaction.

Transaction Type:
Specifies the type of transaction recorded: payment received, retainer applied, credit issued or amount refunded.

Edit:
Click a row to view or edit the transaction details.

Sort:
Any column header can be selected to sort information by that category.

Button Panel

Filters
Use the filters to display only transactions for a contact associated with a specific project or date range. Click Clear to undo the filters.

From-To:
These fields limit the transaction records displayed in the grid to those that fall within the date range specified.

Project:
Make a selection from the drop-down list to specify the project whose transactions you want to view in the grid.

Action

Help:
Opens the ArchiOffice Help in the Contacts section.

New
Select this option to create a new transaction for a contact.

List:
Select to view all transactions.

Find
Select to locate a specific transaction and return a Found Set displaying the results in a List View.

How Do I

HOW DO I ADD CONTACTS?

Do the following to add contacts to ArchiOffice:

1. Click **Contacts** on the navigation bar.
2. Select **New** from the *Action* drop-down list on the Contacts button panel. An empty contacts record displays with tabs for entering Work and Home detail.
3. On the *Work* tab, enter the client contact's name, company, job title and type.
4. Select the **Outlook** check box to have this record synced to your Microsoft Outlook installation.
5. Enter the contact's first address.
6. Select the **Billing** check box to designate this as the Billing address. This address will display on all invoices for the client. When a client has multiple address tabs (for example, Work, Billing, Home), select this check box on the tab containing the address that should display on generated invoices.
7. Specify contact information (that is phone, mobile, email, etc.).
8. Click **Save** when you have finished.

HOW DO I ADD CONTACT ADDRESSES?

Contacts can have multiple addresses for work, home or any office/department location (for example, Accounts Payable).

Do the following to add an additional address for a contact:

1. Click **Contacts** on the navigation bar.
2. Locate the contact record using the Contacts List or select **Find** from the *Action* drop-down to search for a record.
3. Click **Add** next to the right-most tab.
4. Enter a name for the new tab (for example, A/P) and click **OK**. The contact's main name, company, title and type are copied to the new tab.
5. Enter mailing detail (for example, name, address, etc.).
6. Select the **Billing** check box to designate the information on this tab as the billing address or the **Mailing** check box to designate this as the main mailing address.
7. Click **Save**.

HOW DO I SET DEFAULTS FOR NEW CONTACTS?

The Preferences -Contact-Defaults screen is used to specify default settings for all new contacts. Use these preferences to set the default options and selections that display when a new contact record is created. You can set the defaults for address types, communication types, contact types and salutation types, as well as terms for any billing client. In addition, you can add custom check boxes to apply to all contact records.

You can also configure the default name format for new contacts. This controls how contact names display throughout the ArchiOffice system.

Do the following to set defaults for new contacts:

1. Select Preferences from the *master* drop-down list.
2. Open the *Contact* folder and click **Defaults**.
3. Make a selection from the default type drop-down list. You can create new defaults for address types, communication types, contact types, custom check boxes, salutation types and terms. For further details, see the Contact -Defaults preferences.
4. Enter text for the new default in the last row of the list and click **Save**.
5. Click **Formats** in the *Contacts* folder. Configure the default display format of the contact name as instructed in Preferences -Contact-Formats.

HOW DO I DELETE CONTACTS?

Do the following to delete a contact record:

1. Click **Contacts** on the navigation bar.
2. Locate the contact record using the Contacts List View or select **Find** from the *Action* drop-down list on the *Contacts* button panel.

3. Click **Delete** for a listed contact record.
4. Click **OK** on the confirmation message.

See Contacts Detail View for further detail on the options.

HOW DO I FIND CONTACTS?

Do the following to locate a contacts record:

1. Click **Contacts** on the navigation bar.
2. Do one of the following:
   - **Contacts List**: Select the contact from the Contacts List View. If the list does not display when the *Contacts* tab is selected, select **Find All** from the *Action* drop-down list on the Contacts button panel. Click the record you want to view or edit.
   - **Find**: Select **Find** from the *Action* drop-down list on the Contacts button panel. The Contact Search Request screen displays. Enter your search criteria and click **Search**. If only one record matches your search criteria, it displays in the Contacts Detail View. If multiple records match the criteria, they display in the Contacts list.

HOW DO I PRINT ENVELOPES?

Do the following to print envelopes for contacts:

1. Click **Contacts** on the navigation bar.
2. Locate and click a contact record. Select **Find** from the *Action* drop-down list on the Contacts button panel to search for a record if needed.
3. Click the tab (for example, Home, Work, etc.) with the mailing address to be used.
4. Click **Print Envelope** .
5. Choose an envelope size and click **OK**. After selecting the envelope size, it displays in Microsoft Word ready for printing.

HOW DO I PRINT LABELS?

Do the following to print labels for contacts:

1. Click **Contacts** on the navigation bar.
2. Click a listed contact record.
3. Click the tab (for example, Home, Work, etc.) with the mailing address to be used.
4. Click **Print Address Label** .
5. Select a label-printing format from the drop-down list that displays and click **OK**. The address label displays in Microsoft Word ready for printing.

HOW DO I PRINT LABELS FOR MULTIPLE CONTACTS?

Do the following to print labels for multiple contacts:

1. Click **Reports** on the navigation bar.
2. Open the *Contacts* > *Labels* folder.
3. Select a label format (for example, Avery 5161).
4. Select the *Display Details* settings (that is, Sort By and Address to Use).
5. In the *Records to Include* section, do one of the following:
    - **Create a Found Set**: Click **Search** to create a found set of records for which labels are to be printed.
    - **Include Searched Records**: If you already have a found set that includes the records, you want to use, continue to the next step.
6. Select the **Include searched records** check box.
7. Choose the output format (that is, PDF or RTF).
8. Click **Run Report**.

HOW DO I GET DRIVING DIRECTIONS TO CONTACTS?

Do the following to get driving directions for a contact:

1. Click **Contacts** on the navigation bar.
2. Click a listed contact record or select **Find** from the *Action* drop-down list on the *Contacts* button panel to search for a record if needed.
3. Select the tab with the destination address and click **Show Driving Directions** .
4. A map and driving directions display in your web browser using the mapping site selected in Preferences.

HOW DO I RECEIVE EMAILS FROM CONTACTS?

Emails received from contacts in your email program (for example, Microsoft Outlook) can be stored in ArchiOffice to track all project correspondence. Other ArchiOffice users will also be able to view the received email.

Do the following to store received email in ArchiOffice:

1. In your email program, move a client's email into the contact's associated company, contact or project folder in Outlook.

These folders get created when you generate a company, contact or project related email from within ArchiOffice.

2. In ArchiOffice, select **Sync** from the *master* drop-down list.
3. Select the **Emails** check box and click **Sync**. ArchiOffice links the email with the contact record based on the email address. The email displays on the Documents tab of Contacts.

HOW DO I ADD NOTES TO CONTACT RECORDS?

You can add notes to contact records to keep track of details from phone conversations, meetings, etc. These notes are easily viewable by yourself and other ArchiOffice users.

Do the following to add a note to a contact record:

1. Click **Contacts** on the navigation bar.
2. Click a listed contact record.
3. Click the **Logs** tab.
4. Select **Notes** from the drop-down list on the Logs button panel.
5. Enter the necessary detail (that is, date, type, project, etc.).
6. Enter your note or comments in the Description field and click **Add**.

TIME/EXPENSE

TIME/EXPENSE OVERVIEW

Use the Time/Expense module to enter and track time and expense entries. Use the Time screen to enter time and Expense screen to enter expenses. Use the Detail view to either create new entries or view the details of time or expenses. The List View allows you to see all time and expense entries in a list format.

Reference

TIME/EXPENSE - LIST VIEW

The Time/Expense List View provides access to all time and expense entries in a list format.

Dashboard | Contacts | Time / Expense | Projects | Billing | Calendar | Reports

Update ▼ Rows: 100 Help Action ▼

Date	Project # / Name	Phase	Code/Exp Type	Task/Desc	Hrs/Qty	Type	Rate/ Exp	Ext	Emp
01/02/2014	13-00 : Fountainh ...	Website	Office	New website ...	2	Time	$0.00	$0.00	HR
01/01/2014	13-00 : Fountainh ...	In-House Mee ...	Office	Staffing Mee ...	1.5	Time	$0.00	$0.00	PK
01/01/2014	13-00 : Fountainh ...	In-House Mee ...	Office		1.5	Time	$0.00	$0.00	DF
01/02/2014	13-00 : Fountainh ...	Paid Time Off	Vacation	Personal Tim ...	0.5	Time	$0.00	$0.00	DF
01/01/2014	13-00 : Fountainh ...	In-House Mee ...	Office		1.5	Time	$0.00	$0.00	ET
03/14/2014	13-00 : Fountainh ...	Legal	Office		4	Time	$0.00	$0.00	HR
01/02/2014	13-00 : Fountainh ...	Brochure	Office		1	Time	$0.00	$0.00	ET
01/01/2014	13-00 : Fountainh ...	In-House Mee ...	Office		1.5	Time	$0.00	$0.00	GW
03/11/2014	13-00 : Fountainh ...	Website	Office		3	Time	$0.00	$0.00	GW
01/02/2014	13-00 : Fountainh ...	Accounting	Office		3	Time	$0.00	$0.00	PK
01/02/2014	13-00 : Fountainh ...	Brochure	Office		2	Time	$0.00	$0.00	PK
04/19/2014	13-00 : Fountainh ...	Accounting	Misc.		1	Expense	$55,000.00	$55,000.00	HR
01/05/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	PK
01/05/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	GW
02/02/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	DF
01/05/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	HR
01/05/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	ET
01/05/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	DF
03/10/2014	13-00 : Fountainh ...	Professional ...	Office		4	Time	$0.00	$0.00	GW
02/02/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	ET
12/11/2014	13-00 : Fountainh ...	Legal	Car Mileage		25	Expense	$0.51	$12.75	HR
02/02/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	GW
02/02/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	HR
02/02/2014	13-00 : Fountainh ...	Marketing	Office		2	Time	$0.00	$0.00	HR N
02/02/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	PK
01/06/2014	13-00 : Fountainh ...	In-House Mee ...	Office		2	Time	$0.00	$0.00	GW

1 2 3 4 5 6 7 8 9 10 ... Hrs 16821.00 Time $2,323,505.67 Expense $2,323,505.67 Show Total Records

The List View displays all entries. The list provides basic entry details and provides totals for hours, time and expense. The data can be sorted in ascending or descending order by clicking any column header.

You can select any number of desired rows by marking their corresponding check boxes in the list. You can also select all rows by marking the check box in the column heading.

Click a time or an expense row to view its details. To delete a time or an expense, click on the time or expense date to select it and then click **Delete** from the Action drop-down. You can also divide your draft time or expense record into a No Charge and Hold entry or either of them by clicking on the grid. Only draft time and expenses can be split.

If you change all the hours or quantity of your draft time or expense entry from Charge to No Charge or Hold and vice versa, the same entry gets updated as per the new status assigned.

Status

X	Displays until all required time and expense information is completed by you.
✔	Displays when the required information has been entered.
A	If the workflow process is being used, this status indicates the entry has been reviewed and approved.
$	Displays for time and expense that have been billed. When billed, the entry cannot be edited.
H	Displays for time and expense that have been placed on hold to reflect the time as non-billable to the project or to be released for billing at a later time.
D	Displays for those entries that are currently rendered on a draft invoice. When included on a draft invoice, the entry cannot be edited unless you delete that invoice.
N	Displays for time entries that are marked as no-charge items.

Button Panel

Search :
Use this search field to quickly locate time and expense entries. The field's predictive search instantly display results as you type in this field.

Update

Change Project:
Select this option to change the project for the selected time and expenses. If the user, phase or code for the time and expense does not exist in the selected project, it will be created. Billed time and expenses will be left unchanged.

Change Phase:
Select this option to change the phase for the selected time and expenses. If the phase selected does not exist for the project associated to the time and expenses, no change will be applied. Billed time and expenses will be left unchanged.

Change Job Code:
Select this option to change the job code for the selected time and expenses. If the job code selected does not exist for the project associated to the time and expenses, no change will be applied. Billed time and expenses will be left unchanged.

Change Both:
Select to change both the phase and code for the selected time and expenses. If the phase and code selected do not exist for the project associated to the time and expenses, no change will be applied. Billed time and expenses will be left unchanged.

Change Role:
Select to change the role of the employee associated with a time or an expense entry.

If you select the Change Role option for multiple selected time and expense records, the role changes only if all the selected records are associated with the same user.

Change T/E Date:
Click to change the date of the selected unbilled time and expense entries.

Bill:
Select this option to flag the selected time entries as billable. A list of all finalized invoices associated with the project for which the time and expenses were created displays. You can choose which invoice you want to associate those time and expenses with.

UnBill:
Select to un-bill selected time entries.

Approve:
Click to approve selected time and expense entries. This only works if the project for which the time and expenses were created requires an approval process. Additionally, the person selecting this option must be assigned to that project and have the right to approve time and expenses.

Unapprove:
Click to un-approve selected time and expense entries. This only works if the project for which the time and expenses were created requires an approval process. Additionally, the person selecting this option must be assigned to that project and have the right to approve time and expenses.

Bill Rate:
Select to update the bill rate for the selected un-billed time and expenses and use the bill rate set for the individual team member from the team associated with that project.

Cost Rate:
Select to update the cost rate for the selected time and expenses. This option can change the cost rate for both un-billed and billed time and expenses.

Charge Status:
Select this option to change the charge status (that is, Charge, No Charge, and Hold) for selected time entries. This option will not change the billed time and expenses.

Only users with the required time and expense security can change a time or an expense entry's charge status.

Client Reimb:
Select this option to designate that a client can be reimbursed for the selected expenses.

Client Non-Reimb:
If selected, client will not be reimbursed for the selected expenses.

Emp Reimb:
Select this option to designate that an employee can be reimbursed for the selected expenses.

Emp Non-Reimb:
If selected, employees will not be reimbursed for the selected expenses.

Emp Paid Out:
Choose this option to designate that an employee reimbursable expense has already been reimbursed to an employee for the selected expense entries.

Emp Not Paid Out:
Removes the Employee Paid Out flag from selected expense entries.

Apply Markup:
Select to apply the markup flag to the selected expenses to indicate that they are subject to their projects global markup.

Remove Markup:
Select this option to remove the Apply Markup flag.

Help:
Opens the ArchiOffice Help in the Time/Expense section.

Rows:
Select the number of rows you want to see on the grid. The options range from 15 to 500. ArchiOffice memorizes the number of rows selected by you and displays the same next time you log in.

Action

New:
Click to go to the Time/Expense - Detail screen to enter a new time or expense.

Duplicate:
Choose this option to duplicate selected time or expense entries.

Delete:
Select to delete selected time or expense entries.

Delete All:
Select to delete all listed entries.

Update:
Click Update to save the changes made to the draft time or expenses.

Time:
Select to go to the Time/Expense-Time screen.

Exp:
Select to go to the Time/Expense-Expense screen.

Detail
Select to go to the Time/Expense - Detail screen.

Filter:
Select to go to the Time/Expense - Filter screen.

Find:
Select to search for specific time or expense entries.

Re-Find:
Select to make modifications to a previous search request.

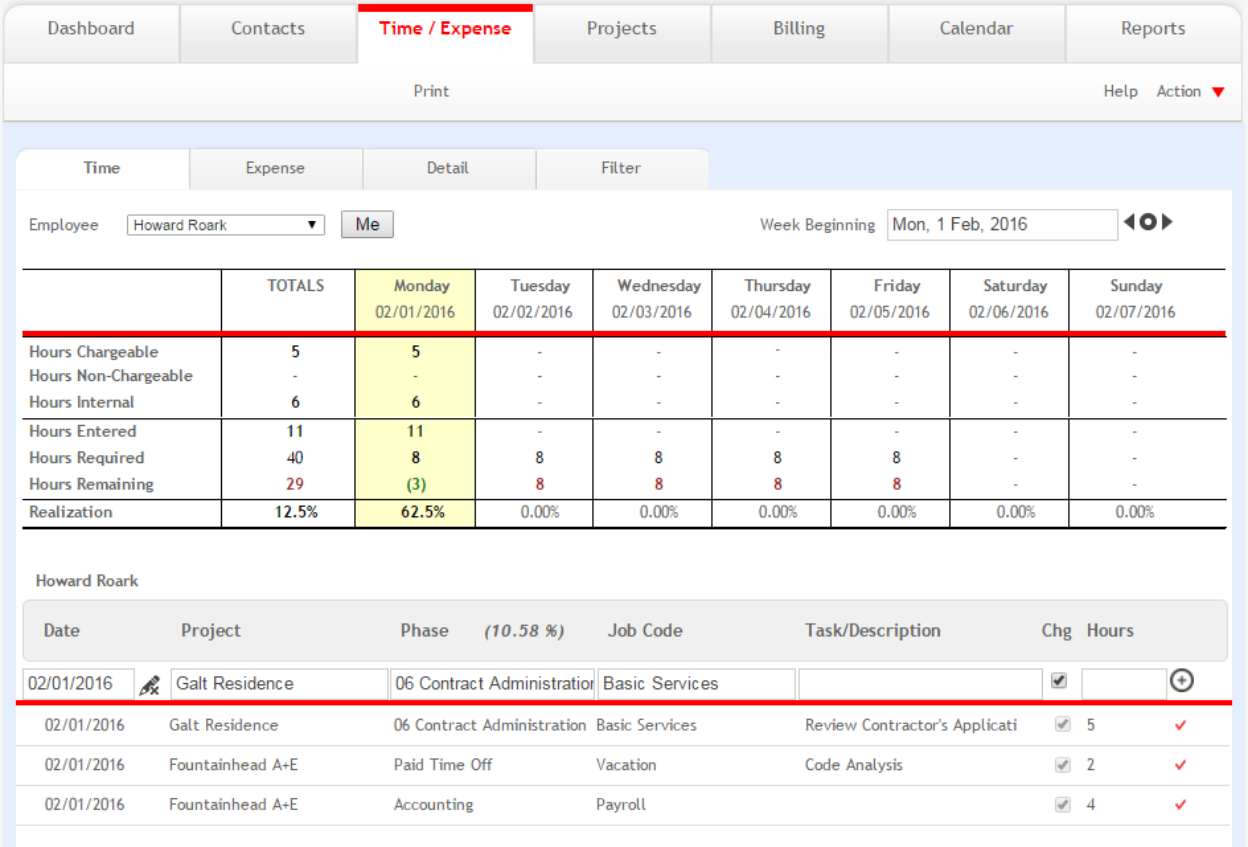
Find-All:
Select to view all entered time and expense entries.

Print:
Select this option to print a report of records displayed in the list view.

Show Total Records:
Click this to display the total number of records in the Time/Expense list.

TIME/EXPENSE - TIME

Use this screen for simple time entry. Most users will use it for recording their time entries for a project.



Employee:
By default, the currently logged in user is listed as the employee. Any time entered will be for this selected user. You can also select the name of an employee for which you want to review time cards. Click **Me** to view or enter your own time entry.

Only employees with proper privileges can enter time and expenses for other employees.

Week Beginning
Use this field to select the week in which you want to view, add or edit time cards. Use the adjacent buttons to jump to the previous, next or current week.

Time Card View

You can see all the time entries for the entire week by clicking the Totals column or only the time entries for a particular day by clicking on that day.

If you select a particular day in the week (highlighted in yellow), then the new time entry line (white time entry top row) will use the selected date. The fields are pre-populated with data, based on your user defaults and what project, phase and job code is entered in the previous time entry.

You can view the time entry efficiency of the employees for the week or day as displayed in the grid. ArchiOffice does not consider internal and non-chargeable time entries for the calculation of realization.

Time Grid

Date:
The date on which the time entry is recorded.

If you select a particular day in the week (highlighted in yellow), then the new expense entry line (white time entry top row) will use the selected date. The fields are pre-populated with data, based on your user defaults and the project, phase and job code selected with the last entered time card.

Edit :
If you need to edit an entry, hover the mouse pointer over the time entry and click .

If the Edit All Users Time/Expenses check box is unselected on the Preferences > Users > Security screen, the time and expenses of other users can be viewed but not edited.

Clear :
Click to clear the time detail fields.

Project:
Select the name of the project for which the time card is being created.

Phase:
Select the phase associated with the time entry. If you select a project first, then only those phases for that project will display. If you do not select a project first, then all phases will display. The percentage next to the Phase label represents the invoiced value as compared to the budget.

Job Code:
Select the code associated with the time entry.

Task/Description:
Enter descriptive detail or comment for the new time card. If using tasks for time, then choose the appropriate task item.

Chg:
Select this check box to make sure the time is billed. If the box is un-checked the time will be set to no charge and if billing hourly or as an additional service and you itemize the invoice, this time entry will appear on the invoice, but will show $0.00 due so it is clear the time is no charge to the project. Non-chargeable time entries are flagged with **N**, thus making it easy for you to identify these on the screen or reports.

Only users with the required time and expense security can change a time and expense charge status.

Hours:
Enter the number of hours used to complete the tasks.

Add New :
Click to save your time and add it to the grid.

Update :
Click to make changes and save them.

To edit any time entry on the grid, click on that item. The details for the selected time entry (highlighted in yellow) will populate the time entry line.

Status

X	Displays until all required time entry information is completed by you.
✔	Displays when the required information has been entered.
A	If the workflow process is being used, this status indicates the entry has been reviewed and approved.
$	Displays for time entries that have been billed. When billed, the time entry cannot be edited.
H	Displays for time entries that have been placed on hold to reflect the time as non-billable to the project or to be released for billing at a later time.
D	Displays for those entries that are currently rendered on a draft invoice. When included on a draft invoice, the entry cannot be edited unless you delete that invoice.
N	Displays for time entries that are marked as no-charge items.

Delete :
If you need to delete a time entry, hover the mouse pointer over the time entry and click .

Button Panel

Print
Click to get a printout of the information displayed on screen.

Help:
Opens the ArchiOffice Help in the Time/Expense section.

Action

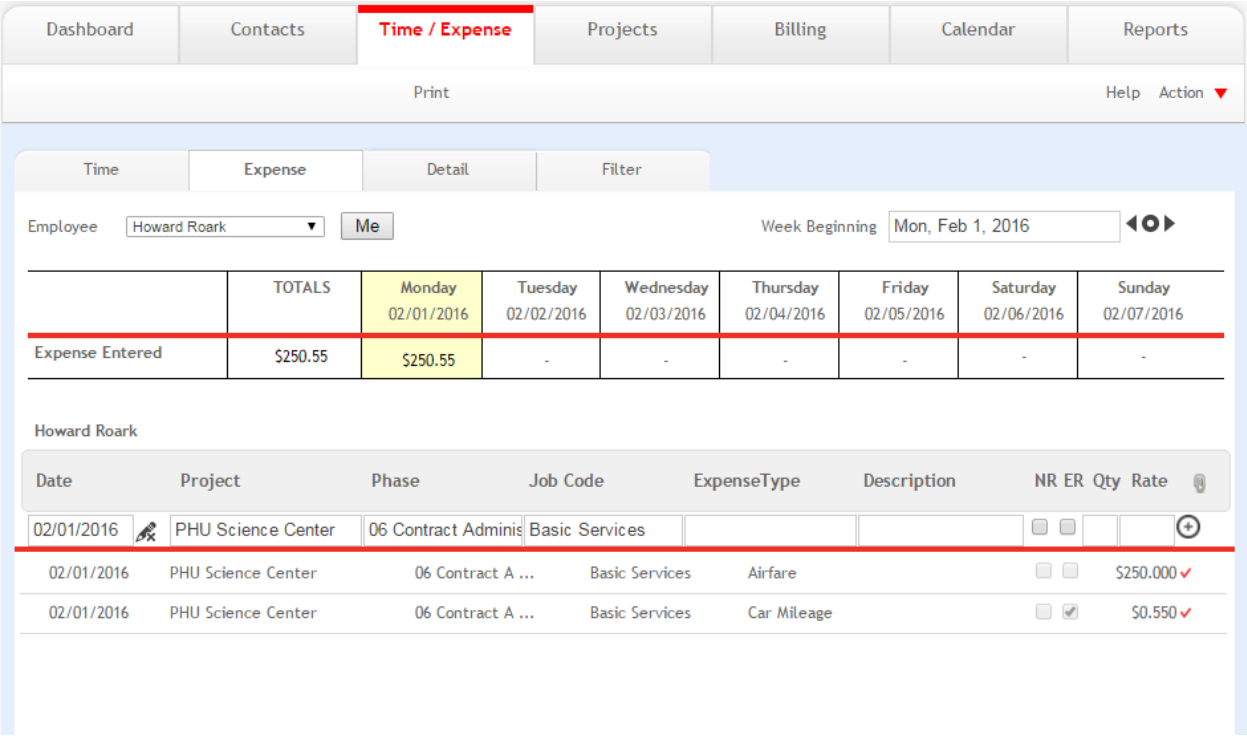
List
Select to view a list of all time entries.

Find
Select to search for specific time entries.

Re-Find
Select to make modifications to a previous search request.

TIME/EXPENSE - EXPENSE

This screen works identically to the Time screen and is used for simple expense entries. This is where most users will record their project related expenses.



Employee:
Select the name of the employee for which you want to review expense entries. Click **Me** to view or enter your own entries.

Only employees with proper privileges can enter time and expenses for other employees.

Week Beginning:
Use this field to select the week in which you want to view, add or edit expense entries. Use the adjacent buttons to jump to the previous, next or current week.

Expense Card

You can see all the expense entries for the entire week by clicking the *Totals* column or only the expense entries for a particular day by clicking on that day (highlighted in yellow) on the grid.

Expense Grid

Date:
The date on which the expense entry was added.

If you select a particular day in the week (highlighted in yellow), then the new expense entry line (top row) will use the selected date. The fields are pre-populated with data, based on your users defaults and the project, phase and job code selected with the last entered expense entry.

Edit :
If you need to edit additional details not shown in the expense grid, hover the mouse pointer over the entry and click to go directly to the Detail View of that entry.

If the Edit All Users Time/Expenses check box is unselected on the Preferences > Users > Security screen, the time and expenses of other users can be viewed but not edited.

Clear :
Click to clear the entry detail fields.

Project:
Select the name of the project for which the expense entry is being created.

Phase:
Select the phase associated with the expense. If you select a project first, then only those phases for that project will display. If you do not select a project first, then all phases will display.

Job Code:
Select the code associated with the expense.

Expense Type:
Select the expense type associated with the expense (for example, car mileage).

Description:
Enter descriptive detail or comment for the new expense entry.

NR:
Select this check box if the entry is not reimbursable by the client.

ER:
Select this check box if an employee must be reimbursed for the expense.

Qty:
Enter the quantity of units for the expense (for example, mileage, hours, etc.).

Rate:
Displays the total expense amount.

Add :
Click to save your entry and add it to the grid. Specify whether the expenses incurred are non-reimbursable or employee-reimbursable by checking the appropriate boxes. In addition, enter the quantity and cost of your expenses.

Update :

Click to make changes and save them.

To edit any entry on the grid, click on that item. The details for the selected entry (highlighted in yellow) will populate the expense entry line.

Attach :

Click to attach a receipt to the corresponding expense. This option appears when you have chosen a project. You can click on it to view the entry's attachment (for example, scanned receipt). ArchiOffice accepts all files that you attach to the expense records, regardless of the length of the file name.

This feature is only available in the ArchiOffice Pro and Enterprise editions.

Status:

X	Displays until all required expense entry information is completed by you.
✓	Displays when the required information has been entered.
A	If the workflow process is being used, this status indicates the entry has been reviewed and approved.
$	Displays for expense entries that have been billed. When billed, the expense entry cannot be edited.
H	Displays for expense entries that have been placed on hold to reflect the time as non-billable to the project or to be released for billing at a later time.
D	Displays for those entries that are currently rendered on a draft invoice. When included on a draft invoice, the entry cannot be edited unless you delete that invoice.

Delete:
If you need to delete a time entry, hover the mouse pointer over the entry and click .

Button Panel

Print
Click to get a printout of the information displayed on screen.

Help:
Opens the ArchiOffice Help in the Time/Expense section.

Actions

List:
Select to view a list of expense entries.

Find:
Select to search for expense entries by certain criteria.

Re-Find:
Select to make modifications to a previous search requests.

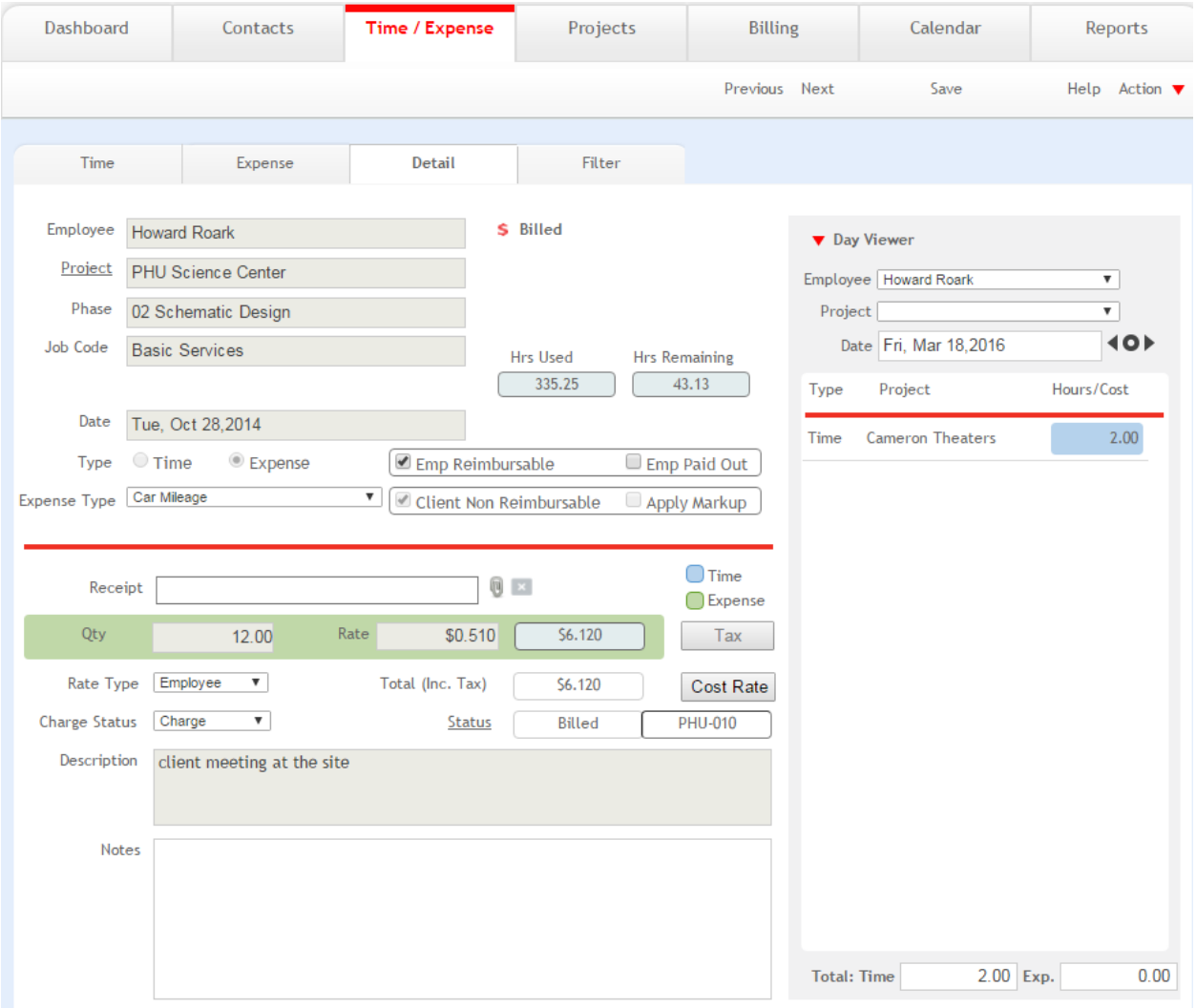
TIME/EXPENSE - DETAIL

This screen is used to create a new time or expense entry and review detailed information about an individual time or expense entry. This is where administrators and project managers can review the details about a particular entry such as the tax, cost status and rate being charged. Project team members will most likely be recording their time and expense items in either the Time screen or Expense screen.

When you create a new time or expense entry from a project, your user name and the project are automatically entered. You then select from the available phases for active projects and job codes. The date for the entry, the entry type (that is, time or expense), hours worked (can be manually recorded or the timer can be used), and a task description, are also recorded. Expense entries also allow for excluding a predefined project expense markup ($ or %), and making an item non-reimbursable.

Not all users can see the information displayed on this screen. Certain users cannot see financial data such as the billable rate, total before tax, total after tax, buttons to apply a tax model or cost rate. In addition, only privileged users can delete time entries, or edit time entries for other users. If the optional workflow process is engaged for this project, then an authorized user can review and approve the entry so that it can be billed.

The fields displayed on this screen change based on the selected entry type (that is, time or expense).



Employee:
Name of the employee for whom the time and expense details are being entered or viewed. The employee can be changed by users with privileges to enter time entries for other employees.

Project:
The project for which the entry is made. You can choose a project from the drop-down list. Only the employee's active projects will be available. On clicking the Project link, you are redirected toward the project details (Professional and Enterprise editions only).

Phase:
The project phase with which the time and expense entry is to be associated. Only active phases for the chosen project are available.

Job Code:
The job code associated with this time and expense entry. Only active and associated job codes for the chosen phase will be available.

Task:
The task associated with the chosen phase/code, which the time and expense entry is to be associated with. This option is only visible if the selected project is set to use tasks for time.

Date:
Date of the time or expense entry recorded. The current date displays by default.

Type:
Specify whether the entry is a time or expense. The fields to be displayed further in the screen depend on the type selected here.

Role:
Select the role of the employee from the drop-down list. This option is only visible if the entry type is set to time.

Expense Type:
Select the type of the expense being entered from the drop-down list. This is only visible if the entry type is set to expense.

Emp Reimbursable:
Select this check box to designate that an employee can be reimbursed for expenses.

Client Non-Reimbursable:
Select this check box when a client-related expense will not be reimbursed by the client. When an expense is marked as non-reimbursable, it will not show up or be included in the value of an invoice. When you create the next invoice that covers this time period, this expense entry will be marked billed and associated with that invoice number, but it will not show up or count towards anything on that invoice.

Apply Markup:
Select this check box to allow a markup amount to be added to the expense.

The *Apply Markup* check box can be toggled on or off for all entries in the current found set by selecting *Apply Markup* or *Remove Markup* from the **Update** drop-down list in the Time/Expense - List View.

Hrs Used
Displays the total hours the employee has worked on the relevant Project Phase/job Code.

Hrs Remaining
Displays the hours the employee has to complete work on the relevant Project Phase/Job Code as set up in the project budget. This value is negative if no project budget has been entered.

Start/End Time
Click the **ON** button to start the timer displaying the starting time or click the **OFF** button to stop the timer displaying the stop time. The time that has lapsed will then be entered automatically in the Hours field. This option is only visible if the entry type is set to time.

This feature is available in the ArchiOffice Pro and Enterprise editions only.

Receipt :

Click to attach a scanned receipt to the expense entry.

Hours/Qty:
For a time entry, specify the hours worked. For an expense entry, specify the quantity of expenses incurred.

Rate:
For time entries, specify the billing rate of the employee. Restricted employees will not see the rate. For expense entries, specify the rate that each quantity is billed at.

Rate Type:
Specify whether the rate type is fixed rate or as specified by the employee.

Total Inc. Tax:
This read-only fee displays the income tax based on the current tax settings and cost rate.

Tax:
Click this button to change tax details (for example, tax method, PST or GST rate).

Cost Rate:
Click this button to create a new cost rate for the entry.

Charge Status
Specify the charge status as one of the following:

- **Charge**: billable to the client and able to appear on an invoice.
- **No Charge**: non-billable to the client and displays on the invoice. The extended amount displays as *No Charge.* The fee goes against the cost of the project.
- **Hold**: non-billable to the client and does not appear on the invoice. The fee goes against the cost of the project.

Only users with the required time and expense security settings can change a time or an expense charge status.

Status:
Click this link to change the status of the entry. This allows you to mark an entry effectively as billed by selecting an existing invoice to associate this entry with.

Description:
Enter descriptive details on the time and expense entry. Information entered in this field will appear on the invoice if using itemized billing for hourly or additional services.

Notes:
Add additional comments or details in this field. Information entered in this field will not appear on this invoice, but will be for internal purposes only.

Day Viewer

This panel displays a list of all time or expense entries made by the selected employee on a selected date. You can choose to view time or expense entries for a particular employee or project. Click the panel's header to hide or display it.

This feature is available in the ArchiOffice Enterprise edition only.

Entry Status:

X	Displays until all required time or expense information is completed by you.
✔	Displays when the required information has been entered.
A	If the workflow process is being used, this status indicates the entry has been reviewed and approved.
$	Displays for time or expense entries that have been billed. When billed, the time or expense cannot be edited.
H	Displays for time or expense entries that have been placed on hold to reflect the time as non-billable to the project or to be released for billing at a later time.
D	Displays for those entries that are currently rendered on a draft invoice. When included on a draft invoice, the entry cannot be edited unless you delete that invoice.
N	Displays for time or expense entries that are marked as no-charge items.

Button Panel

Previous:
Click to display the previous time and expense record.

Next:
Click to display the next time and expense record.

Save:
Click to save time and expense entry details.

Help:
Opens the ArchiOffice Help in the Time/Expense section.

Action

New:
Select to create a new time or expense entry in Detail view. You can also enter time and expenses from the Time screen and Expense screen, respectively.

Duplicate:
Select to duplicate the current time or expense entry in view.

Delete:
Select to delete the selected time or expense entry.

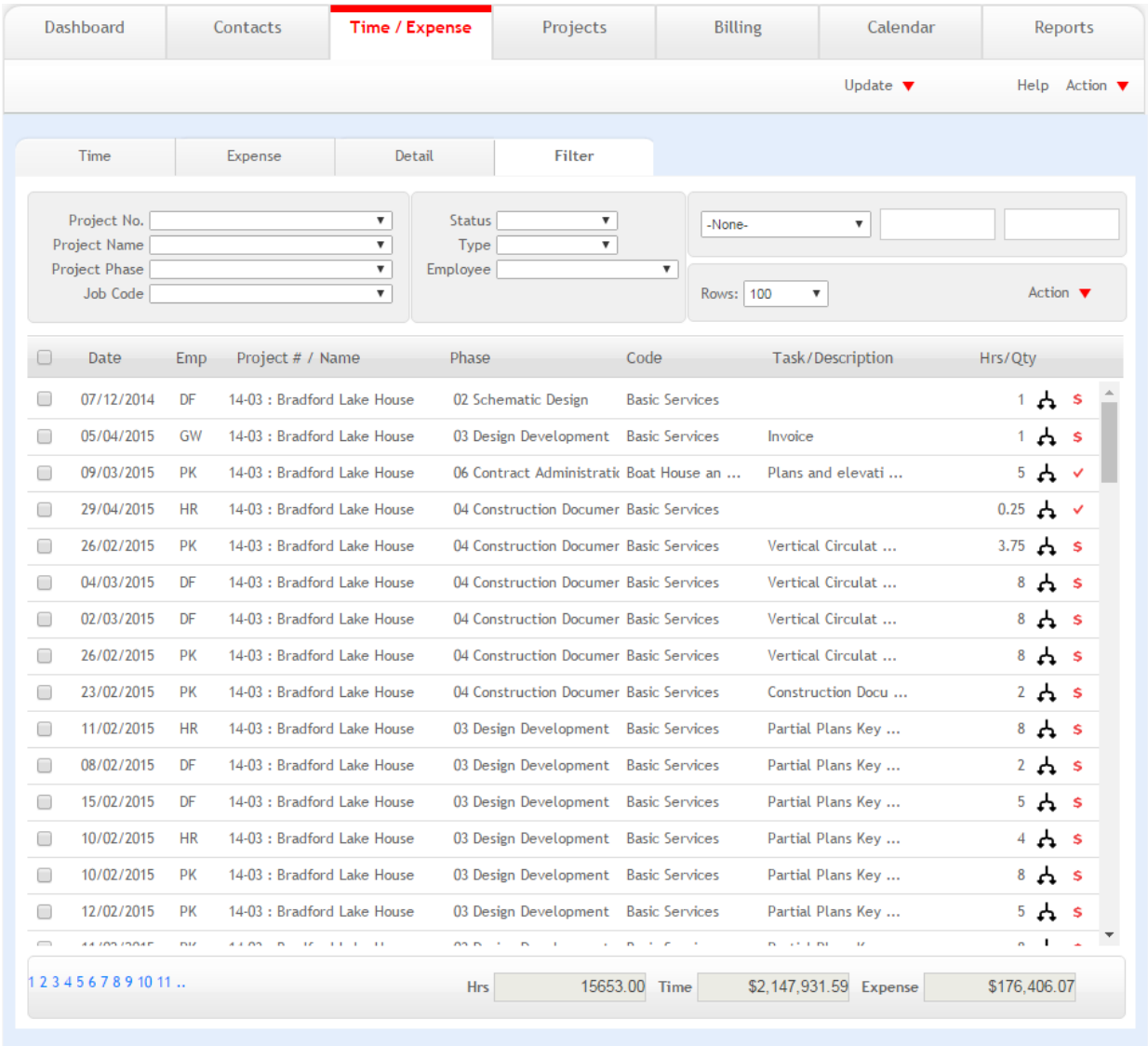
List:
Select to view a list of active time and expense entries.

Find:
Select to search for time or expense entries.

Re-Find:
Select to go to the search view and modify a previous search requests.

TIME/EXPENSE - FILTER

Use this screen to search through all of the time and expense entries in the system and view selective entries.



Filters

Use the filters (for example, project number, status, dates, etc.) above the grid to narrow the list of displayed entries. The filters can be combined in any combination to display only matching entries. You can also apply the predefined date filters and specify the number of rows to display in the grid.

Rows:
Select the number of rows you want to see on the grid. The options range from 15 to 500. ArchiOffice memorizes the number of rows selected by you and displays the same next time you log in.

Action

Update:
Click Update to save the changes made to the draft time or expenses.

Clear Filters:
Click to clear all the filters applied.

Grid

The time and expense grid displays all entries that match your search criteria. The list provides basic entry details and provides totals for hours, time and expense. The data can be sorted in ascending or descending order by clicking any column header.

Only users with proper permission can edit some of the fields in this screen. You can edit the fields by hovering your mouse pointer on them.

You can select any number of desired rows by marking their corresponding check boxes in the list. You can also select all rows by marking the check box in the column heading.

Date:
Date of the time or expense entry recorded. The current date displays by default.

Employee:
Initials of the employee for whom the time or expense details are being entered or viewed.

Project #/Name:
The project number and the name associated with the time or expense entry.

Phase:
The project phase the time or expense entry is to be associated with.

Code:
Displays the job code associated with the time or expense entry.

Task/Description:
Displays the description or task for the new time or expense entry.

Hrs/Qty:
Displays the hours or quantity for the time or expense entry, respectively.

Click the row to access the Time/Expense - Detail screen for any entry.

Split :
You can divide your draft time or expense record into a No Charge and Hold entry or either of them by clicking on the grid. Only draft time and expenses can be split.

If you change all the hours or quantity of your draft time or expense entry from Charge to No Charge or Hold and vice versa, the same entry gets updated as per the new status assigned.

Button Panel

Update

Change Project:
Select this option to change the project for the selected time and expenses. If the user, phase or code for the time or expenses does not exist in the selected project, it will be created. Billed time and expenses will be left unchanged.

Change Phase:
Select this option to change the phase for the selected time and expenses. If the phase selected does not exist for the project associated with the time and expenses, no change will be applied. Billed time and expense will be left unchanged.

Change Job Code:
Select this option to change the job code for the selected time and expenses. If the job code selected does not exist for the project associated to the time and expenses, no change will be applied. Billed time and expenses will be left unchanged.

Change Both:
Select to change both the phase and code for the selected time and expenses. If the phase and code selected do not exist for the project associated with the time and expenses, no change will be applied. Billed time and expenses will be left unchanged.

Change Role:
Click to change the role of the employee who entered the selected time or expense entry.

Change T/E Date:
Click to change the date of the selected unbilled time and expense entries.

Bill:
Select this option to flag selected time entries as billable. A list of all finalized invoices associated with the project for which the time and expenses were created displays. You can choose which invoice you want to associate those time and expenses with.

UnBill:
Select to un-bill selected time entries.

Approve:
Click to approve selected time and expense entries. This only works if the project for which the time and expenses were created requires an approval process. Additionally, the person selecting this option must be assigned to that project and have the right to approve time and expenses.

Unapprove:
Click to un-approve selected time and expense entries. This only works if the project for which the time and expenses were created requires an approval process. Additionally, the person selecting this option must be assigned to that project and have the right to approve time and expenses.

Bill Rate:
Select to update the bill rate for the selected un-billed time and expenses and use the bill rate set for the individual team member from the team associated with that project.

Cost Rate:
Select to update the cost rate for the selected time and expenses. This option can change the cost rate for both un-billed and billed time and expenses.

Charge Status:
Select this option to change the charge status (that is, Charge, No Charge, and Hold) for selected time entries. This option will not change billed time and expenses.

Only users with the required time and expense security can change an entry's charge status.

Client Reimb:
Select to update all selected expenses and set the reimbursable flag.

Client Non-Reimb:
Removes the reimbursable status. When an expense is marked as non-reimbursable, it will not show up or be included in the value of an invoice.

Emp Reimb:
Select this option to designate that an employee can be reimbursed for the selected expenses.

Emp Non-Reimb:
If selected, employees will not be reimbursed for the selected expenses.

Emp Paid Out:
Choose this option to designate that an employee reimbursable expense has already been reimbursed to an employee for the selected expense entries.

Emp Not Paid Out:
Removes the Employee Paid Out flag from selected expense entries.

Apply Markup:
Select to apply the markup flag to the selected expenses to indicate that they are subject to their projects global markup.

Remove Markup:
Select this option to remove the Apply Markup flag.

Help:
Opens the ArchiOffice Help in the Time/Expense section.

Action

List:
Select to view a list of all time and expense entries.

Find:
Select to search for time or expense entries.

Re-Find:
Select to make modifications to a previous search requests.

How Do I

HOW DO I CREATE TIME ENTRIES?

You can add time using ArchiOffice Time/Expense-Detail screen or Time screen. The Time screen provides a quick and easy way to enter multiple time entries and monitor your time efficiency. The Time/Entry -Detail screen provides more options when entering time in comparison to the Time screen. For example, you can specify your project role, enter a description to display on an invoice, and turn on a timer to track your time.

Using the Time Screen

Do the following to enter time via the Time screen:

1. Click **Time/Expense** on the navigation bar. The Time tab displays by default. Your user name displays in the *Employee* field by default. If you are entering time for another employee, select that person's name from the drop-down list.

2. On the entry line, specify the time details (that is, Project, Phase, Job Code, and Task/Description).

The date filed on the entry line displays the current date by default. When making a time entry for a prior date, change this field as needed.

3. Select the **Chg** (that is, Charge) check box if this time entry is billable.

4. Enter the time worked and click **Add** ⊕.

Time/Expense Detail Screen

Do the following to enter time using the detail view:

1. Click **Time/Expense** on the navigation bar and then click the *Detail* tab.

2. Your name displays in the *Employee* field by default. The current date displays and Time is selected as the default entry type. Specify the time and expense project, phase, and job code.

   If you access the Details view by selecting New on the Projects-Time/Expense screen button panel, the project will automatically be specified.

3. Change your project role if needed.

4. Do one of the following:

   - If you are about to start a task, click the **Timer** toggle button to start the clock. Click it again to stop it when the task is completed. The time automatically displays in the Hours field.
   - If entering time for a completed task, enter your time manually in the Hours field.

5. Click the **Tax** or **Cost Rate** buttons if you need to change the default values for the time entry.

6. Specify the **Charge** status (that is, Charge, No Charge, or Hold).

7. Enter text to display with the time entry on the invoice.

8. You can enter comments in the Notes field as needed. This content is for internal purposes only. It does not print on invoices.

9. Click **Save**.

HOW DO I CREATE EXPENSE ENTRIES?

Do the following to create an expense entry:

1. Click **Time/Expense** on the navigation bar and then click the **Expense** tab.

2. By default, the currently logged in user is selected in the *Employee* field. Users with the appropriate permissions can select other users for which they want to create an expense entry.

3. In the *Add Entry* row, specify the entry date in the first field.

You can change the week by making a selection from the Week Beginning field.

4. Select the project, phase, job code, expense type, and enter a description.

5. Specify whether or not the entry is non-reimbursable (NR) or employee reimbursable (ER).

Select NR if the cost is not to be charged as a disbursement to the client. Select ER if you, or an employee, have paid for it and expect a company reimbursement.

6. Enter the quantity (Qty.) and unit cost (excluding GST).

7. Click **Add** to log the entry.

You can add a receipt by clicking on Attach .

HOW DO I MONITOR MY TIME?

Use the Time/Expense -Time screen to monitor how efficiently you are managing your time. Aside from using this view to enter time entries, you can also use it to view the time entered for a selected week.

Employees can see the hours entered that were chargeable, non-chargeable, and time entered for internal purposes only. They can also see a realization percentage based on the hours completed out of the total hours required for a day. You can view time detail for the day or totals for the week.

Click any day in the displayed week to view a list of time entries entered for that day.

HOW DO I APPROVE TIME AND EXPENSES?

If the Time/Expense Slips Require Approval option is enabled for a project, then its time and expense entries must be approved before they can be billed.

Do the following to approve time and expense entries:

1. Click **Projects** on the Navigation bar.

2. Select a listed project.

3. Click the Time/Expense tab and choose **Time** or **Expense** from the button panel.

4. Select **Unapproved** from the *Status* drop-down field to filter the list.

5. Select a listed time or expense.

6. Select the **Approved** check box and click **Save** on the button panel.

The Approve option only displays if the Time/Expense Slips Require Approval check box is selected on the Time/Expense tab.

You can also approve or un-approve a batch of time and expenses by creating a Found Set in the Time/Expense List View and selecting Approve or Un-approve from the Update drop-down list on the screen.

HOW DO I DETERMINE COST RATE FOR EXPENSES?

When it comes to calculating the cost rate for an expense record, ArchiOffice uses the Rate field to determine that. If this rate is modified, the cost rate will not be updated automatically. If you want to modify the cost rate of an expense, you can do so from the Time/Expense -Detail screen by clicking the Cost Rate button on the right of the Status field.

The only time a cost rate is automatically modified is when it has a value of $0 or null. However, if a value already exists (for example, a default rate set by the expense default settings) and you change the rate, the cost rate will remain unchanged.

For example, in the Time/Expense Detail screen, you can select an expense type *FFE* (Furniture, Fixture and Equipment), enter a quantity of *1* and a rate of *$2,000* (the client being charged $2000). This expense entry will automatically be given a cost rate of $2,000. If you later modify the rate to $1,000, the cost rate will still remain as $2,000 until you click the Cost Rate button and modify it. It is not unusual for companies to overcharge a client (say $3,000 for an FFE item) and then modify the cost rate manually so that their profitability reports reflect the true profit for that expense item.

HOW DO I TRACK SICK, PERSONAL AND HOLIDAY TIME?

You can use ArchiOffice to track employee sick, paid time off (PTO) and holiday time by doing the following:

1. Create an internal project or open an existing one.

2. Create a project phase called *Paid Time Off*. Make sure this phase is active.

3. Create job codes such as Vacation, Holiday, Sick Leave, Jury Duty, Bereavement, etc.

4. Select the check box for each of the job codes to associate them with the *Paid Time Off* phase.

5. Select the *Active* check box and choose *Additional* service option for each code.

After completing these steps, you can now enter time for the PTO project phase. When you run the Payroll report (Reports > Time and Expense > Payroll), it will isolate the hours associated with these internal job codes (Additional Services) as line items, allowing you to track these hours easily.

HOW DO I GENERATE EMPLOYEE TIME REPORTS?

Do the following to generate employee time reports:

1. Click **Time/Expense** on the navigation bar.
2. On the Time screen, select an employee from the *Employee* drop-down list for which a time report will be printed.
3. Specify the week for which you want to print the employee's time report in the *Week Beginning* field.
4. Click the **Print** on the Time/Expense button panel. The time report displays.
5. Click the **Print File** button to print the time report.

You can also run a Slip Report for a given employee by billing status, by day, with totals for the period. A variety of filters is available to customize the report.

HOW DO I TRACK EXPENSES?

With ArchiOffice, you can track expenses by creating phases and job codes, which employees can use when adding expense entries. You can enter budget values for these phases to generate reports that compare actual and budgeted expense values.

The following information provides instructions on how to track project related expenses.

Create Phases and Job Codes for Expenses

1. Open a project for which you want to track expenses.

2. In the **Projects > Details screen**, click the **Phases/Codes** tab.

3. Add a phase for the expenses (e.g., Site Commission).

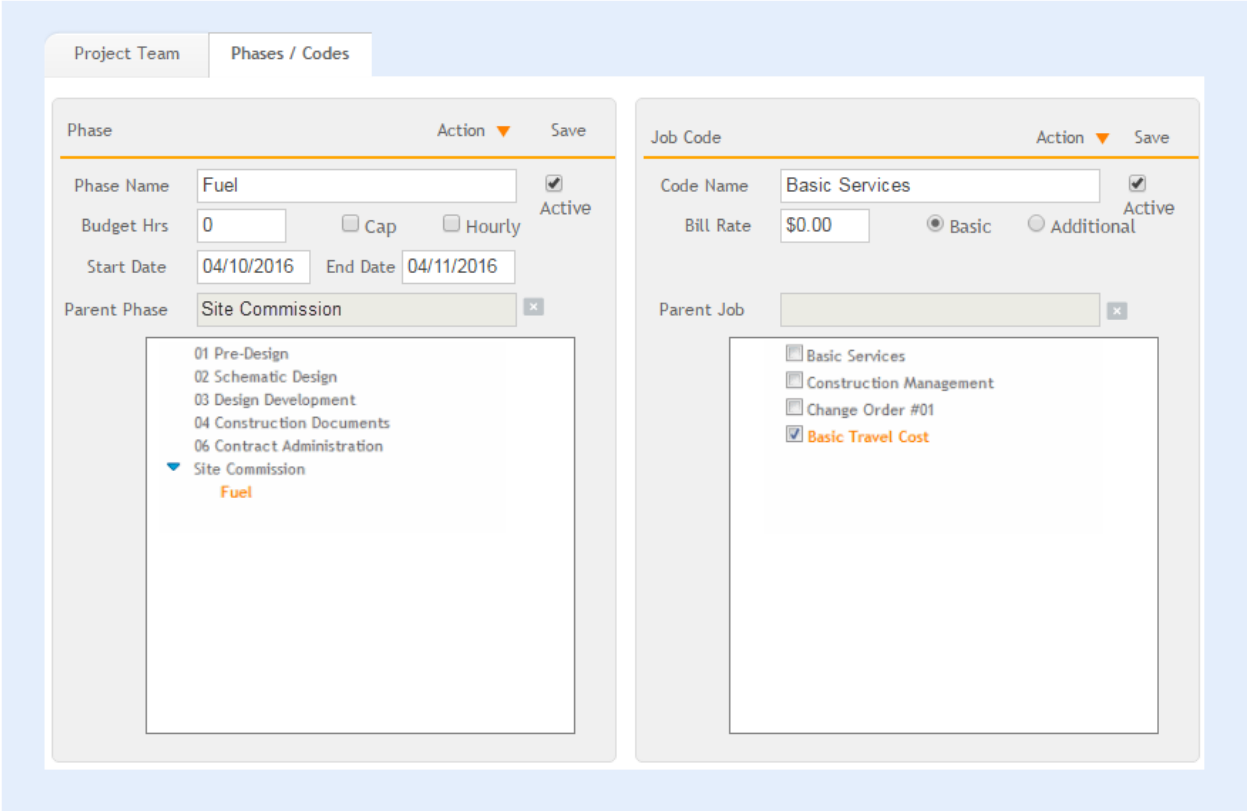
4. Add sub-phases (e.g., Fuel, Entertainment, and Hotel).

5. Select the **Active** check box for the main and sub-phases. Click **Save** after adding the phases.

6. In the *Job Code* section, create a new job code (e.g., Basic Travel Costs).

7. Choose **Basic** for the service type and select the **Active** check box.

8. In the *Phases* section, select this job code for each sub phase. Click **Save** for each phase.



Create Budgets

Next, you need to enter expense budget values.

1. Go to the Projects > Billing screen and select Budgets from the drop-down list.

2. Set the fee for each sub-phase. Select **Save Phases** from the *Action* drop-down.

The sub-phases are added up and the sum total displayed against the parent phase. For example, for a phase called Site Commission with the following sub-phases: Fuel = $500, Entertainment = $300 and Hotel = $200. The Site Commission's total budget would be $1000. The total of all the phases is displayed at the bottom of the pane.

3. Have your employees record expense items against the project using the expense related phases and job codes (e.g., Fuel, Hotel and Entertainment).

Employees must select the NR check box to record the expenses as Non-Reimbursable.

4. Go to the *Projects-Billing-Summary screen* for your project. Under the Budget section, you can see the budget you previously set. In the Actual section, you can see the actual expenses recorded against the project.

   Under normal circumstances, all expenses are reimbursable by the client (on-charged) so there is no cost to the project, that is, not counted as an actual expense. However, in this case, the expenses are non-reimbursable by the client so we can track the costs, as they are an actual project cost and therefore display in the Actuals grid. If we were to record the expenses as Reimbursable, they would not display in the Actual grid.

Compare Budget vs. Actual Numbers

After the budget has been created and the expenses entered, you can compare the expenses against your budget with ArchiOffice reports.

Do the following to compare budgeted and actual amounts:

1. Click **Reports** on the navigation bar.
2. Select **Projects > Budget vs. Actual** from the Standard Reports list.
3. Click **Search** to access the criteria search screen.
4. Select the Project Name or other criteria and click **Search**.
5. Click **Run Report**.

   In the report, *$ Budget* = Budgeted $ for the phase. *$ Used* = Actual expenses recorded.

6. Run the same report again, but select **Detail** from the Type drop-down list on the report selection screen to see a detailed breakdown.

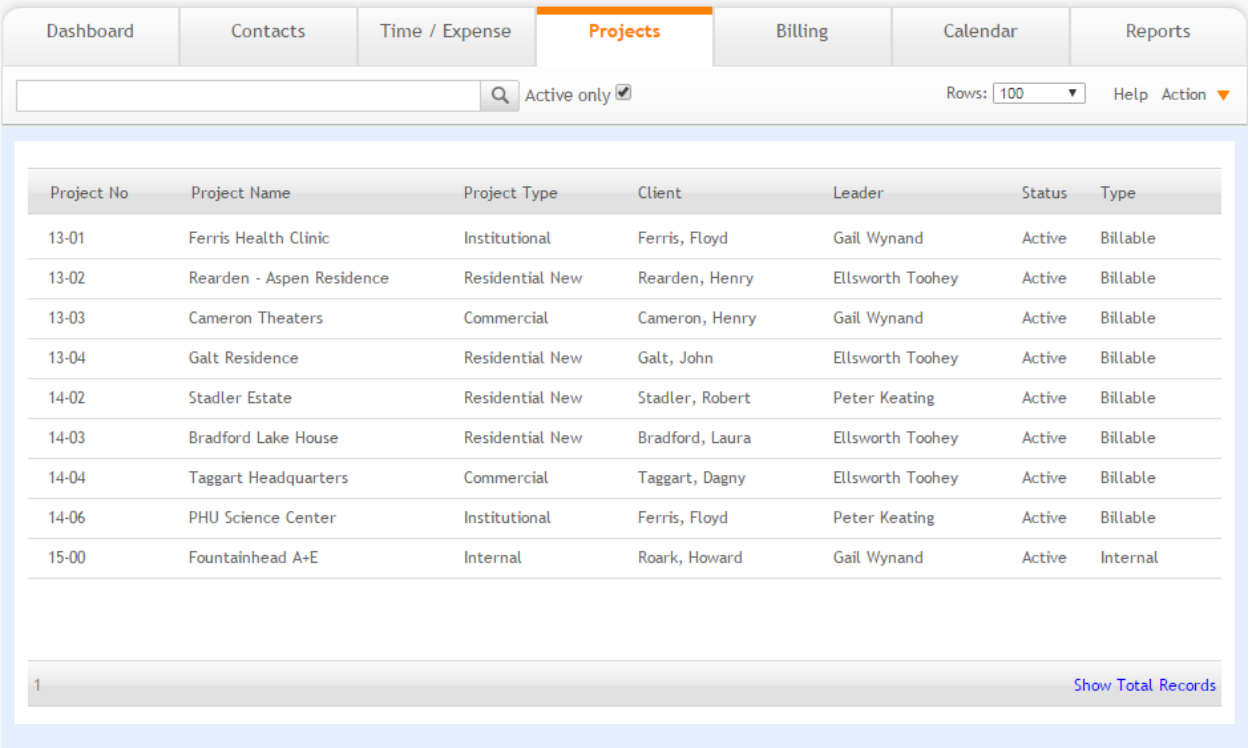
In the reports module, there are a number of useful reports that you can run to track the expenses and see how they are affecting the overall cost and profitability of a project. The Project Time-Expense Report will breakdown hours, time worked, expenses occurred and give appropriate sum totals. The Billing Summary report is another useful report for tracking expenses.

PROJECTS

Reference

PROJECTS LIST VIEW

The Projects List View provides a listing of all projects in the system. When you first access this view, it will only show your active list of projects (that is, projects you are involved in as a team member).



Project No	Project Name	Project Type	Client	Leader	Status	Type
13-01	Ferris Health Clinic	Institutional	Ferris, Floyd	Gail Wynand	Active	Billable
13-02	Rearden - Aspen Residence	Residential New	Rearden, Henry	Ellsworth Toohey	Active	Billable
13-03	Cameron Theaters	Commercial	Cameron, Henry	Gail Wynand	Active	Billable
13-04	Galt Residence	Residential New	Galt, John	Ellsworth Toohey	Active	Billable
14-02	Stadler Estate	Residential New	Stadler, Robert	Peter Keating	Active	Billable
14-03	Bradford Lake House	Residential New	Bradford, Laura	Ellsworth Toohey	Active	Billable
14-04	Taggart Headquarters	Commercial	Taggart, Dagny	Ellsworth Toohey	Active	Billable
14-06	PHU Science Center	Institutional	Ferris, Floyd	Peter Keating	Active	Billable
15-00	Fountainhead A+E	Internal	Roark, Howard	Gail Wynand	Active	Internal

1

Projects Grid

The grid displays a list of project records. You can sort the list and toggle it between ascending and descending order by clicking one of the column headers. Click a project row to view its details.

Project No:
The column displays the project number.

Project Name:
The project name displays in this column.

Project Type:
Detail on the type of project displays in this column (for example, residential, restaurant, commercial, etc.).

Client:
The name of the client linked with the project displays in this column.

Leader:
The name of the project leader displays in this column.

Status:
The project status displays in this column (for example, Active, Open, etc.).

Type:
This column displays the project charge status (that is, billable, RFP, and internal).

Delete :
To view details for a listed project, hover the mouse pointer over it and click . All transactions and invoices must be deleted before you can delete a project. This orphans any time entries currently on the deleted project and marks them as incomplete.

Button Panel

Search :
Use this search field to locate projects quickly. The field's predictive search instantly displays results as you type in this field. You can check the Active Only filter to search only active projects.

Active Only
Mark this check box to search only the active projects. ArchiOffice memorizes the state of this check box (marked or unmarked) next time you log in.

Help:
Opens the ArchiOffice Help in the Projects section.

Rows:
Select the number of rows you want to see on the grid. The options range from 15 to 500. ArchiOffice memorizes the number of rows selected by you and displays the same next time you log in.

Action

> **New:**
> Select to create a new project.
>
> **All Active:**
> Select this check box to display only projects with an active status.
>
> **My List:**
> Projects that you are actively involved with as a team member can be accessed using the My List button.
>
> **Find:**
> Select this option to locate a particular project and return a found set displaying the results in a List View.

Re-Find:
Use Re-Find to return to the last Find criteria so you can modify the requests before executing the search.

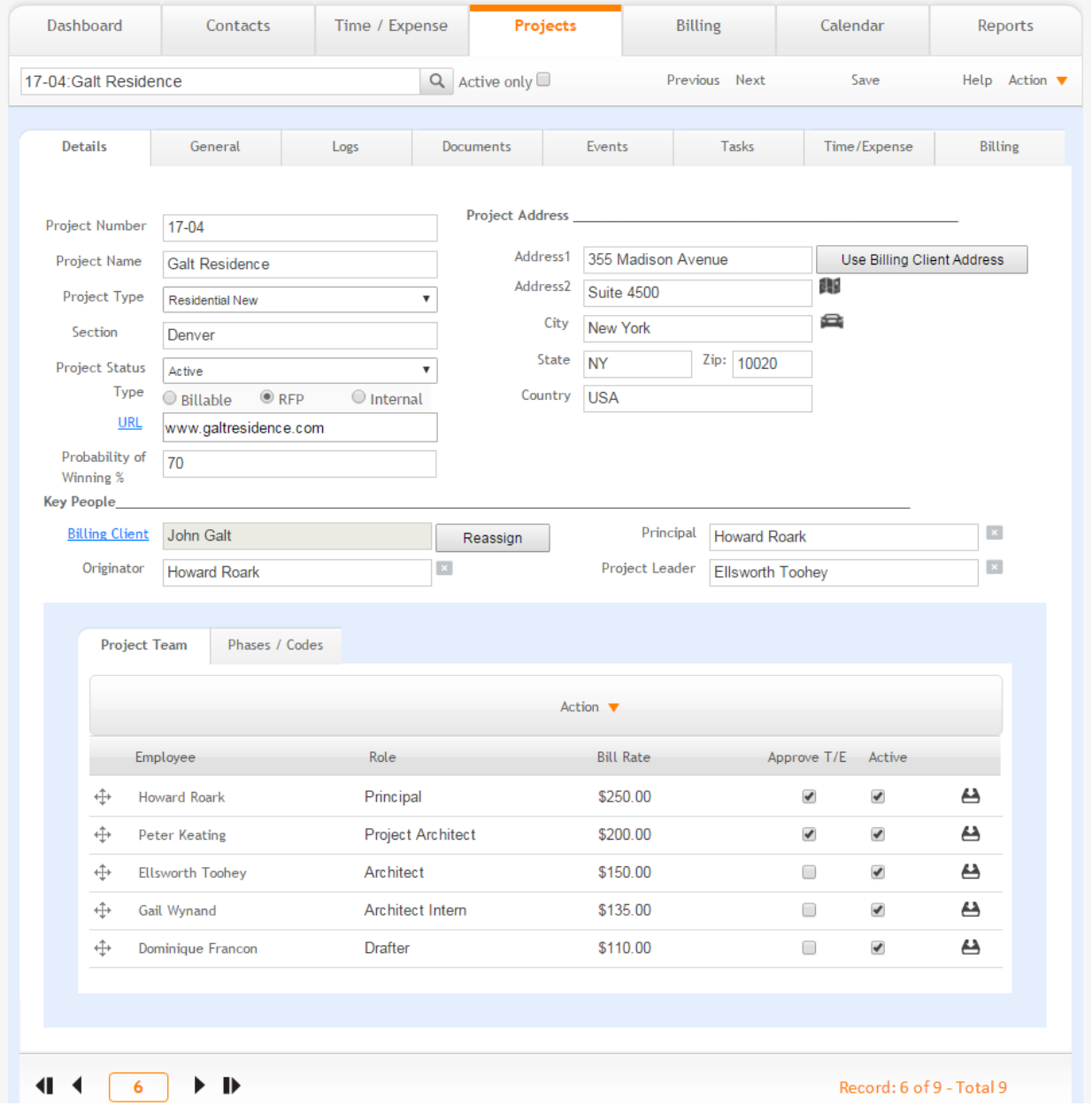
Find All:
Select to display all project records in the List View.

Print:
Select this option to print a report of records displayed in the list view.

Show Total Records:
Click this to display the total number of records in the Projects list.

PROJECTS - DETAILS

The Projects - Details screen is used by authorized users to set up project specific information including Project Name, Project Type, Billing Client, Status, Team Members and Rate, Project Contacts and Role, Phases, as well as Job Codes and associated rates.



Project Details

Project Number:

The Project Number field is entered when the project is created. This number can be anything you want, up to 11 characters in length. Creating a project is a secure privilege. After a project number has been assigned to a project it can only be changed by a user with the proper privileges. This user must also have the rights to rename the project's document folder on the ArchiOffice Server.

When creating a new Project, if you use a number other than the next in the sequence, the sequence is not incremented (auto increment number does not get used).

Project Name:
The Project Name field identifies the project by name. You should be as descriptive and concise as possible for users to identify the project easily.

Project Type:
The Project Type field is used for classifying your projects. The Type drop-down list is defined in the Preferences area by the administrator.

Business Unit (Department):
Enter the department or unit name associated with this project or the office location (if you have multiple offices). You can label the department or business unit whatever you like on the Preferences > Project > Defaults screen.

Project Status:
Specify the status of your project. When a project is completed or changed, you can edit the status accordingly. Below is a list of status options available in ArchiOffice.

Active	Used for active, ongoing projects
Inactive	Used for inactive projects that might be on hold
Cancelled	Used for projects that are cancelled
Completed	Used for completed projects
RFP-Awarded	Used for RFP projects acquired by the firm
RFP-Lost	Used for unsuccessful RFP projects that the firm could not acquire
RFP-Open	Used for new RFP projects not yet acquired by the firm
Template	Used for projects that you want to save as a template. This template can be used at the time of creating new projects. All its data from the Projects > Details screen is copied to the new project, if selected.

If you select Inactive or Completed, the project is removed from the active list of projects and does not appear on entering time. However, all the projects are included in the reports, irrespective of their status. To include only active, billable projects on reports, see the Search button function in the Reports topic.

Type:
Use the **Billable/RFP/Internal** options to flag the project according to the type of work done on it.

URL:
Enter a URL or web address associated with a project, if any. Click the URL to navigate to that address on the Internet.

Probability of Winning:
Probability or chances of acquiring a project in terms of percentage.

This option is visible only for the RFP type projects.

This feature is available in the ArchiOffice Enterprise and Professional editions only.

Project Address

Address 1 & 2:
The street address of the project location. The field size should not exceed 55 characters for each line.

Use Billing Client Address:
Click this link to populate the address fields automatically with the client's billing address.

City:
The project location's city. The field size should not exceed 45 characters.

State:
The two-letter abbreviated name of the state or province where the project is located.

Zip:
The project location's zip code or postal code. The field size should not exceed 14 characters.

Country
The country or region where the project is located.

Street Map
Shows street map for the address mentioned.

Driving Directions
Shows driving directions to the mentioned address.

Key People

Billing Client:
Click the label of this field to go to the contact record of the client whose name is displayed.

Reassign:
Use the Reassign hyperlink to assign a different Billing Client to this Project. You will first perform a Find and then select the new contact from the Contacts List View.

Originator:
The originator will automatically default to the user who created the project.

Principal:
Enter or select the employee who is assigned the Principal role for a project.

Project Leader:
Enter or select the employee responsible for leading the project in this field. Click to clear the value of this field.

Project Team Tab

Action

Assign Employee
Use the Assign Employee link to add additional Project Team members.

Assign Team
Use the Assign Team link to assign an entire team of employees (defined in Preferences) with their respective roles and rates to the project.

Team members already on a project cannot be added again. The rates of the existing members will not be updated to reflect the newly assigned team.

You can reorder the project team list by dragging and dropping them at the desired location. Click and hold the mouse button on the row that is to be moved and then release the mouse button at the target location (for the project team being repositioned).

Update Rates
Use the Update Rates link to update the billing rates for all active Project Team Members using the latest user defaults from Preferences.

Grid

This grid displays employees assigned to a project team in addition to their bill rates, time and expense entry approval and activity status.

Employee:
Displays team member names.

Role:
Displays the role of assigned team members. When a role of an assigned team member is changed, it prompts you to update the role for the time and expense too. You can either select All T/E Slips, Current T/E Slips or None to cancel.

Bill Rate:
Displays an employee's bill rate. Click the field to edit the rate. When the employee's team bill rate is updated, it prompts you to update the bill rate for current slips. You can either select Current T/E Slips to update the entries or None to cancel.

Approve T/E
Select the check box in this column for any employee you want to have the privilege to approve time and expense entries.

Active
Select check boxes in this column to designate the employees that will be actively involved with the project. Employees who are not marked active will not be able to

create time and expense entries for this project. If you click the Active header link, you can assign the Active or Inactive status to multiple team members at once.

Save :
Click to save changes for a listed team member.

Phases/Codes Tab

Phase

These are the distinct parts of a project for which you have a budget and monitor actual costs. In addition, there can be hundreds of tasks that need to get done by employees by certain dates in each phase of the project. ArchiOffice comes with predefined phases (for example, Schematic Design, Design Development, etc.), but authorized users can create anything they want (for example, Parts Dept., Service Dept., etc.). Basically, phases are the parts of a job that you have a budget for with tasks assigned to team members and to which time and expenses will be entered against so you can monitor the progress of a project (actual vs. budget, progress and tasks). After adding a phase to a project, you can move that phase up in the phase order. You can also set the start and end dates for the phases that allows you to run financial reports that can project revenue over time by calculating the budgeted fee over the length of the phase.

Action

Add Template:
Add a template phase defined in Preferences for the projects. Only those template phases are listed which are not added to the project.

Add Main:
Add a root phase.

Sort A to Z:
Click to sort phases in ascending alphanumeric order.

Sort Z to A:
Click to sort phases in descending alphanumeric order.

Sub:
Add a child phase to the selected phase.

You cannot add a sub-phase to a phase that has been included on an invoice.

When adding a sub-phase to a phase that has been used when recording time or expense entries, all job codes, budget details, tasks and time and expense entries are moved to the new sub-phase.

When adding a sub-phase to a phase that has not been used to record a time or expense entry, if the *Use Task for Time* option on the Projects-Tasks screen has been enabled, all job codes, budget details, tasks, and time and expense entries are moved to the new sub-phase. Otherwise, the

budget and job codes will be moved to the new sub-phase and you will be given the option to move the tasks.

Delete:
Choose this option to delete a selected phase.

Move Up/Move Down:
Select one of these options to change the phase order.

Save:
Click to save changes made to listed phases.

Phase Name:
Identifies the Phase Name.

Active:
Select this check box if the phase is active and employees can enter time and expenses against it. Clear this option to prevent users from applying time or expenses against this phase. Deactivating a phase is useful if it has been completed, fully billed, or if you want to prevent additional time and expense entries for it.

The phases appear grayed out if their Active check boxes are unmarked.

Budget Hours:
Enter the budgeted amount of time that a phase will take to complete.

Cap:
Check if the phase is hourly and is not to exceed a certain monetary amount.

This check box can only be selected if the *Hourly* check box is already selected.

Hourly:
Check if the phase is hourly and should be charged as time and material above and beyond the contract fee.

Clearing this option will also clear the *Cap* check box if it was already selected.

Start Date:
Enter the date on which the phase starts.

End Date:
Enter the date on which the phase ends.

Parent Phase:
When a sub-phase is selected, its parent phase displays in this read-only field.

Make this Parent :
Click to move a selected child phase to the parent level.

Job Code

Represents the list of services you will be providing within the phases of your project. Each job code can have a rate associated with it as well. So when a time entry is recorded, the rate will be set to the bill rate of the job code rather than the employees default charge rate.

Action

Add Template:
Add a template Job Code defined in Preferences for the projects.

Add Main:
Adds a root or parent job code.

Sort A to Z:
Click to sort phases in ascending alphanumeric order.

Sort Z to A:
Click to sort phases in descending alphanumeric order.

Sub:
Adds a child job code to the selected Job Code.

Delete:
Select this option to delete a selected job code.

Move Up/ Down:
Select one of these options to change the phase order.

Code Name:
Identifies the Number and Job Code Name.

Active:
Check if the job code is active and employees can enter their time and expenses against it. If no longer needed, clear this option so users cannot apply time or expenses against the job code.

The codes appear grayed out if their Active check boxes are unmarked.

Bill Rate:
Bill rate of a particular job code (this takes precedence over a team member's billing rate).

Service:
Choose **Basic** when working with fixed fee projects to use the Job Code for time that is to be part of the fixed fee. Choose **Additional** to have all time be billed as time and materials, in addition to the fixed fee. Generally, all job codes for expenses will be set to Basic.

Parent Job:
When a sub-task is selected, its parent task displays in this read-only field.

Make this Parent :
Click to move a selected child-task to the parent level.

Button Panel

Search :
Use this search field to locate projects quickly. The field's predictive search instantly displays results as you type in this field.

Active Only
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Save:
Click to save changes made to a project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

Find All:
Select to view all projects.

General

PROJECTS - GENERAL OVERVIEW

From the Projects - General screen, make a selection from the drop-down list to access and view the following information and features:

Info - Select this option to set up a list of project contacts, key people, and project milestones.

Misc - Choose this option to access the Miscellaneous screen in which you can add secured project notes your firm wants to keep confidential from other viewers. In addition, this screen displays custom fields used to store information at the project level. These fields can be added as merge fields in your customized documents.

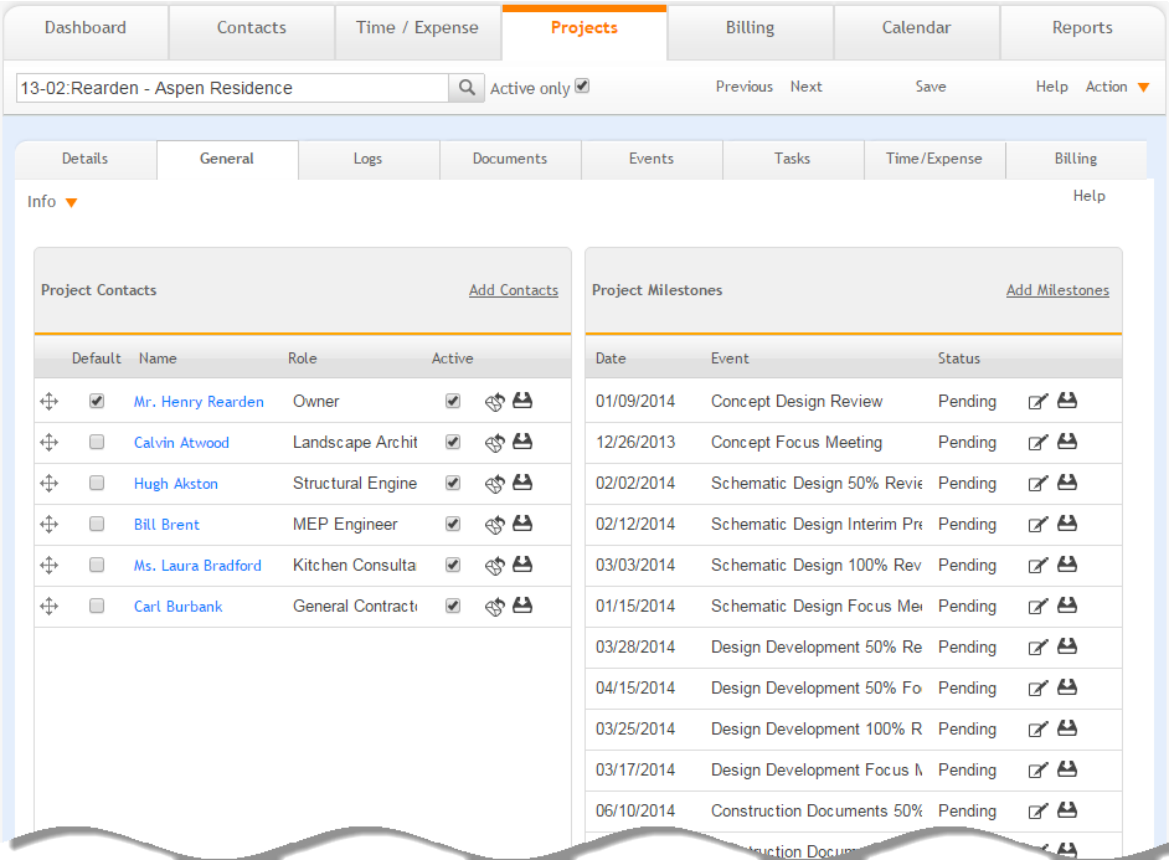
Data - Select this option to view or edit descriptive information about the project, typically after the project has been completed.

Charts - Select this option to view performance charts for a specific project (for example, profitability, receivables, and project fees).

SF330- Architects must provide an SF330 document (that is, Standard Form 330) when bidding on government projects. This form requires a firm to detail its relevant disciplines and experience using *Function* and *Profile* codes. When applying for such jobs, select this option to enter SF330 detail and store this information with a project record.

PROJECTS - GENERAL - INFO

The options on this screen are used by an authorized user to set up a list of project contacts, key people, and project milestones.



Project Contacts

Add Contact:
Click this link to find contacts to include as project contacts. These can be any contacts in your ArchiOffice system, including client, subcontractors, vendors, etc. This provides quick access to contact details for everyone working on the project other than employees.

You can reorder the contact list by dragging and dropping it at the desired location. Click and hold the mouse button on the contact that is to be moved and then release the mouse button at the target location (for the contact being repositioned).

Default:
Select this check box to make a selected person the default project contact.

Name:
This field displays the contact name. Click it to go to the contact's record.

Role:
Make a selection from this drop-down list to designate the contact's role in the project.

Active:
Select this check box to include a selected person as an active contact.

Email :
Click to email a contact.

Apple Mail users should note the following:

- When email is clicked, ArchiOffice creates an email project folder in Apple Mail. Any email in that folder will sync back to the proper project in ArchiOffice.
- You can rename the project email folder created by ArchiOffice in Apple Mail without breaking the link between the folder and the ArchiOffice project.
- If you receive any outside emails and move them to the folder created in Apple Mail by ArchiOffice, those emails are synced back to ArchiOffice and properly linked to the project and contact with an email address that matches the one in any of the *To*, *From*, *CC*, fields.
- If you receive an outside email and move it to a folder created by a user it will only sync if the folder uses the following naming convention: **<Project Number>: <Project Name>**. The information in the folder name must match exactly with the project number and name in ArchiOffice; otherwise, the email in the folder will be linked to contacts but not to any project.

Update :
Click to save changes for a listed item.

Delete :
Click to remove a selected contact from the list.

Project Milestones

Project milestones are key dates related to the lifecycle of a project that you want to schedule on the calendar. Existing milestones appear in chronological order (based on the date given to the milestone event) and are then sorted by description. For new projects with no added milestones, default milestones get loaded using the order set in Preferences > Project > Milestones.

All the grid columns can be sorted in ascending or descending order by clicking on any of the column headers.

Add Milestones:
Click this link to select one or all of the milestones set up in Preferences or to create new custom milestone for the project.

Date:
Click to enter the date associated with the project milestone.

Event:
Displays the name of the event associated with the project milestone.

Status:
Click to change the status of a milestone from pending to achieved.

Edit :
To access the milestone details (Calendar - Detail screen), click . Every milestone can be assigned a date, time, notes, documents and attendees.

Update :
Click to save changes for a listed item.

Delete :
Click to remove a selected contact from the list.

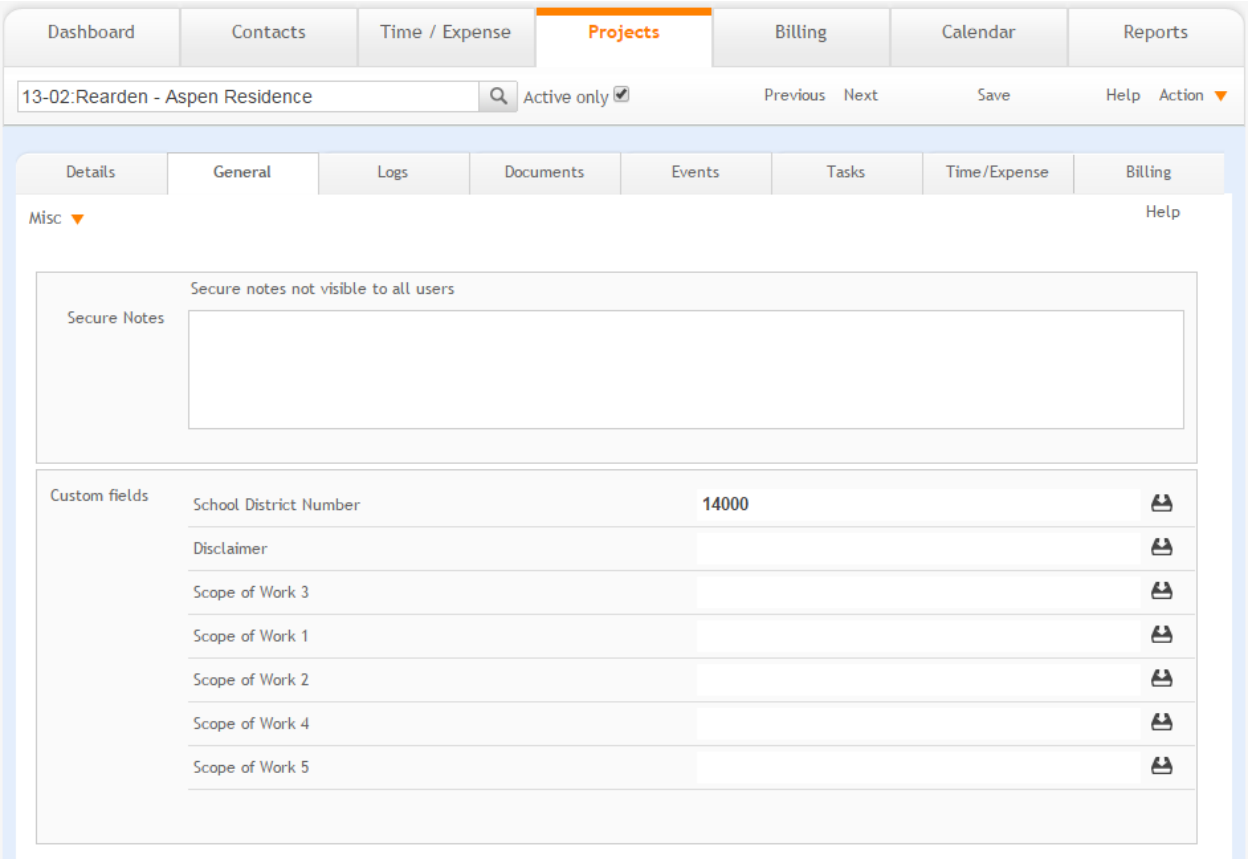
Button Panel

Help:
Opens the ArchiOffice Help in the Projects section.

PROJECTS - GENERAL - MISC

The Projects - General - Misc screen provides two useful project management features. First, this screen provides a field in which a Project Manager or Principal Architect can enter project notes that only they can view. You can enter notes regarding whatever your firm wants to keep confidential from other viewers.

In addition to the *Security Notes* field, the Misc screen also contains a customized area for users. This area displays custom fields used to store information at the project level. These fields can be added as merge fields in your customized documents.



Secure Notes:
Enter confidential or classified information in this field. This field does not display for users who have not been granted the *Secure Project Notes* privilege. See Preferences - Users - Security for further details on security and privilege settings.

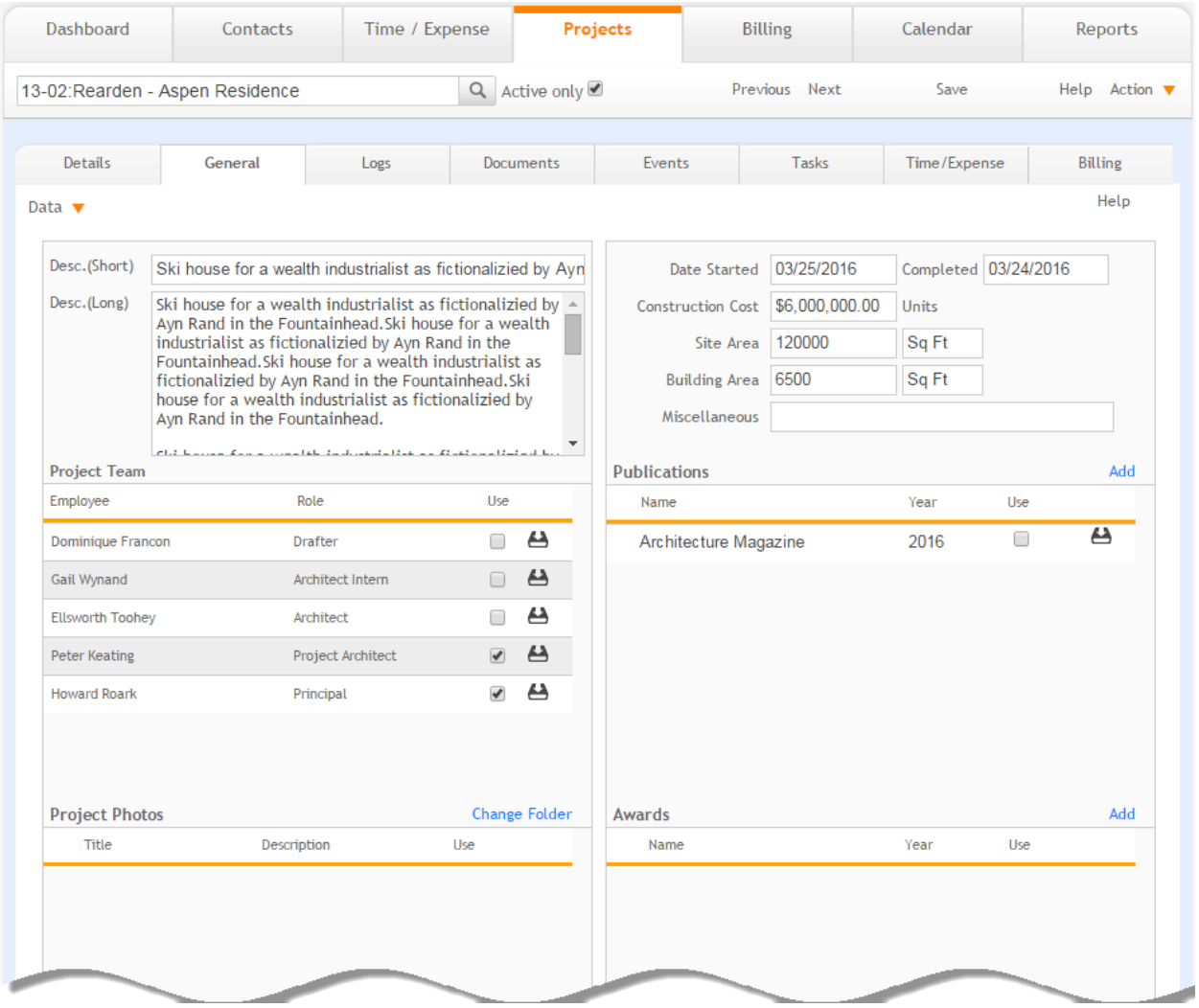
Custom Fields:
This section contains custom fields added by your ArchiOffice administrator to suit your firm's unique project management needs. See Preferences - Project - Miscellaneous for further details on adding custom fields. Click **Update** to save the edits made to a custom field. You can search for a project based on the value of these custom fields.

Button Panel

Help:
Opens the ArchiOffice Help in the Projects section.

PROJECTS - GENERAL - DATA

This screen is used to describe information about the project, typically after the project has been completed.



Description (Short):
Enter a short summary description for this project.

Description (Long):
Enter a long description for this project.

Date Started:
Enter the date this project was started. By default, it is pre-filled with today's date.

Completed:
Enter the date this project was completed.

Construction Cost:
Enter the construction cost for this project.

Site Area:
Enter the site area for this project.

Site Area Units:

Specify the units for the site area. The default for all new projects is specified in the preferences.

Building Area:
Enter the building area for this project.

Building Area Units:
Specify the units for the site area. The default for all new projects is specified in the preferences.

Miscellaneous:
Enter the miscellaneous information about the project.

Project Team

Use:
Select this check box to specify which project team members you want to include in the export for mail merging to new marketing materials. You might not want to include all your team members in the marketing materials.

Save :
Click to save your changes.

Publications

Add:
Click to add new publications to the Publications portal.

Edit :
Click to make changes to a listed publication.

Use:
Select this check box to specify which project publications you want to include in the export for mail merging to new marketing materials. You might not want to include all your publications in the marketing materials.

Delete :
Click to remove the selected item from the grid.

Save :
Click to update your changes.

Project Photos

Change Folder:
Click this link to change the current folder. You can click on any photo to open it in your default image viewer. You can also enter a description for each of the photos, and review the photo details by clicking **Info**. You need to use a photo of an appropriate size for the template you are going to use for generating marketing materials (experiment with your templates).

Use:
Select this check box to specify which project photos you want to include in the export for mail merging to new marketing materials. You might not want to include all your photos in the marketing materials. All the photos in the current folder will be displayed in this portal.

Save :
Click to save your changes.

Awards

Add:
Click to add an award received for a project.

Edit :
Click to make changes to a listed award.

Use:
Specify which project awards you want to include in the export for mail merging to new marketing materials by checking the *Use* check box. You might not want to include all your awards in the marketing materials.

Delete :
Click to remove the selected item from the portal.

Save :
Click to save your changes.

Folder:
Select a folder where all your project photos are stored. This will be one of the project folders that already exist for the project. You can then specify which photos in the folder you want to use for new marketing materials.

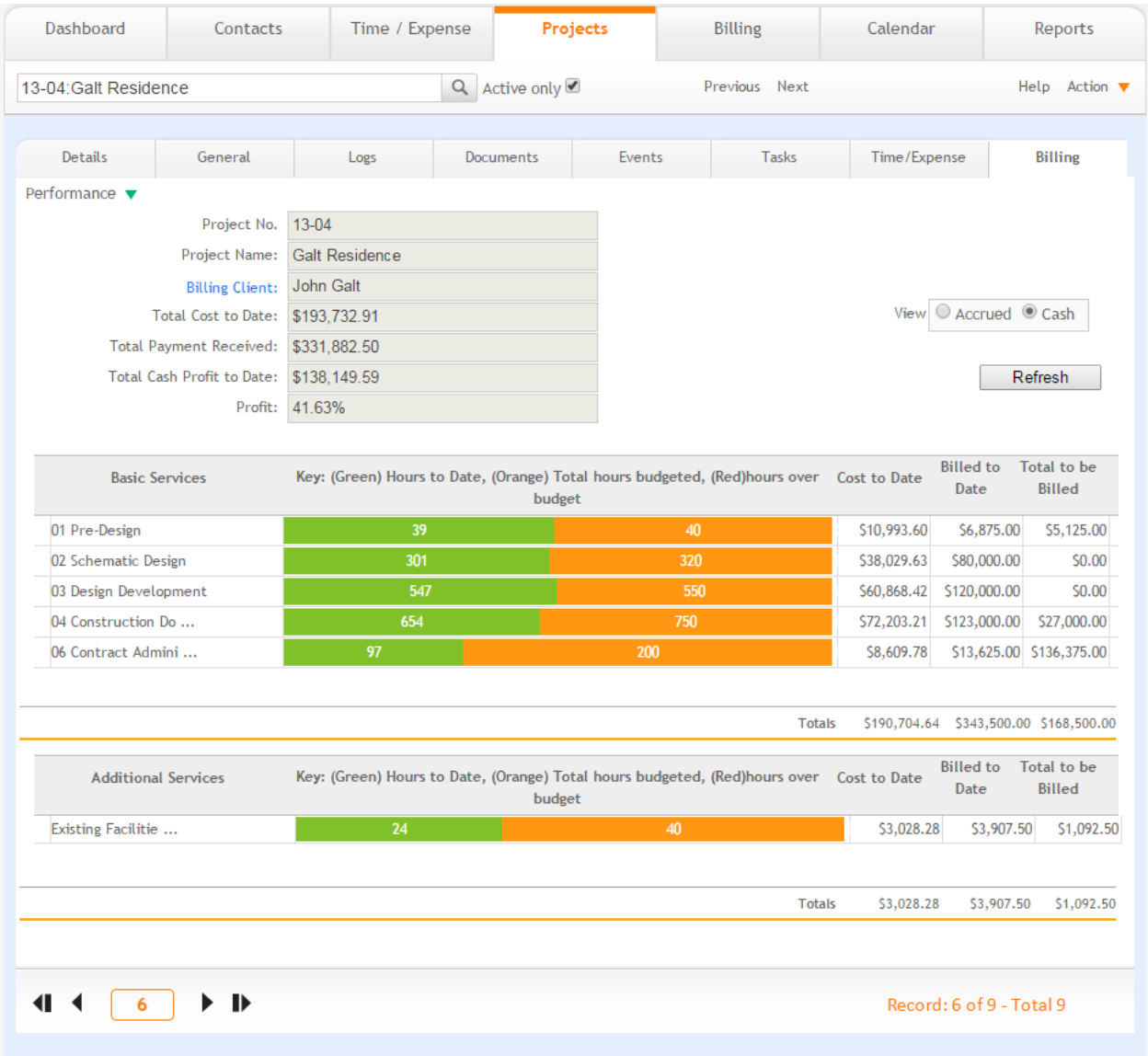
Button Panel

Help:
Opens the ArchiOffice Help in the Project section.

PROJECTS - BILLING - PERFORMANCE

The Performance screen provides a snapshot of a project's progress. It shows a visual overview of hours worked for both basic and additional services. A bar chart compares the hours worked to date with the budgeted hours and hours over budget. The chart also details a project's cost and billed amounts by services provided.

In addition, you can get a quick view of the project's cost, earning and profitability as of the current date. These values can be viewed using either the accrued or cash accounting method.



Project No.
This field displays the project number.

Project Name
This field displays the project name.

Billing Client
This field displays the name of the project's Billing Client - the contact that receives the invoices. Click this field's label to select a different client to assign to this project.

Total Cost to date
This field displays the total project labor and expenses to date.

This amount is greater than the *Cost to Date* amount in the *Services* chart because it factors in the employee cost. It includes all employee hours on the project multiplied

by the cost rate for that employee. This value also includes any non-reimbursed costs on the project.

Total Payments Received/Total Net Billings + Markup to date
These fields display the project's generated income to date. The **Total Payments Received** field displays when the *Cash* view is selected. It is the total for all payments that the client has applied to the project. The **Total Net Billings + Markup to Date** field displays when the *Accrued* view is selected. This value is the total for all basic and additional services as well as the markup that was applied for reimbursable expenses. It also takes into account any adjustments that might have been applied to the invoice.

Total Cash/Total Accrued Profit to date
This field displays the amount of profit recorded for a project to date. The field label varies based on the selected view type (that is, accrued or cash). The value in this field is:

- **Cash Method:** *Total Cash Profit to Date* = Total Payment Received - Total Cost To Date
- **Accrued Method:** *Total Net Billing + Markup to Date* = Total Payment Received - Total Cost To Date

Profit
The ratio of cost to earnings displays in this field. For firm's using the cash method, the value is based on the following:

- **Cash Method**: Profit = Total Cash Profit to Date/Total Payment Received
- **Accrued Method**: Profit = Total Accrued Profit to Date/Total Net Billing + Markup to Date

Regardless of the selected view (that is, accrued or cash), the values are always calculated in the same order.

View
Choose **Accrued** or **Cash** to view cost, income and profit values based on the accounting method used by your firm.

Basic/Additional Services Grid
This grid provides a bar chart showing progress being made for all project services, basic and additional. Choose **Basic Services** or **Additional Services** to change the service detail displayed in the grid. You can view the hours served to day, budgeted hours and hours over budget. In addition, the grid also displays the Cost to Date, Billed to Date and Total to be Billed for each service.

Refresh
Click this button to update the data displayed on the Performance screen.

Button Panel

Search  **:**
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field.

Active Only:
Mark this check box to search the active projects only.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

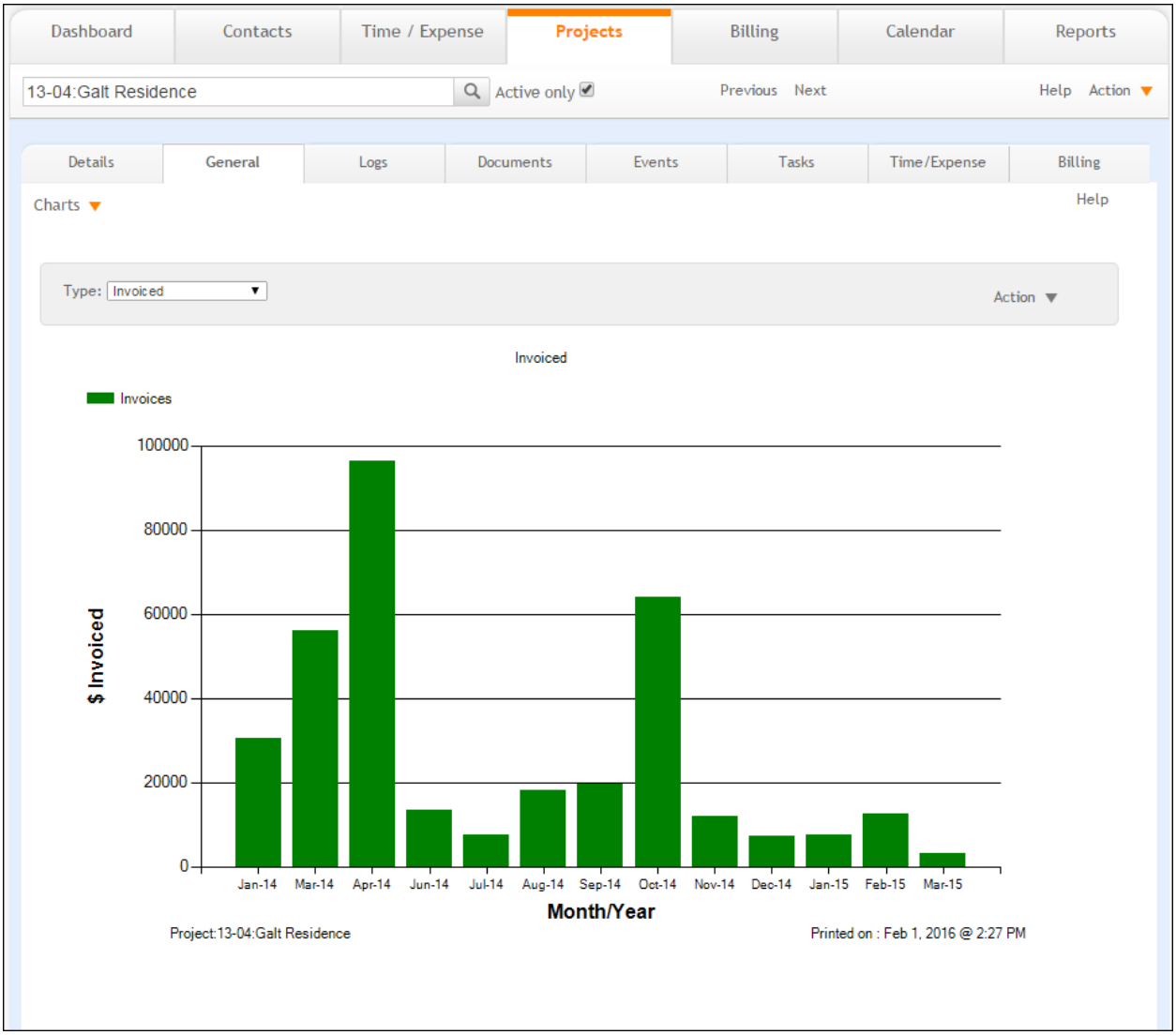
List
Select to view a list of all projects.

Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - GENERAL - CHARTS

This screen displays performance charts for a specific project (for example, profitability, receivables, and project fees).



Type:
Select the desired chart from the list of chart categories. The options include A/R, Hours, Invoiced, Profitability, etc.

Action

Filters:
Choose this option to filter the data used in the charts. You can filter data by date, user, and charge status. The available filters vary by chart.

Print:
Choose to print a hard copy of the displayed chart. The project name, number and print date will display on the printed chart.

Button Panel

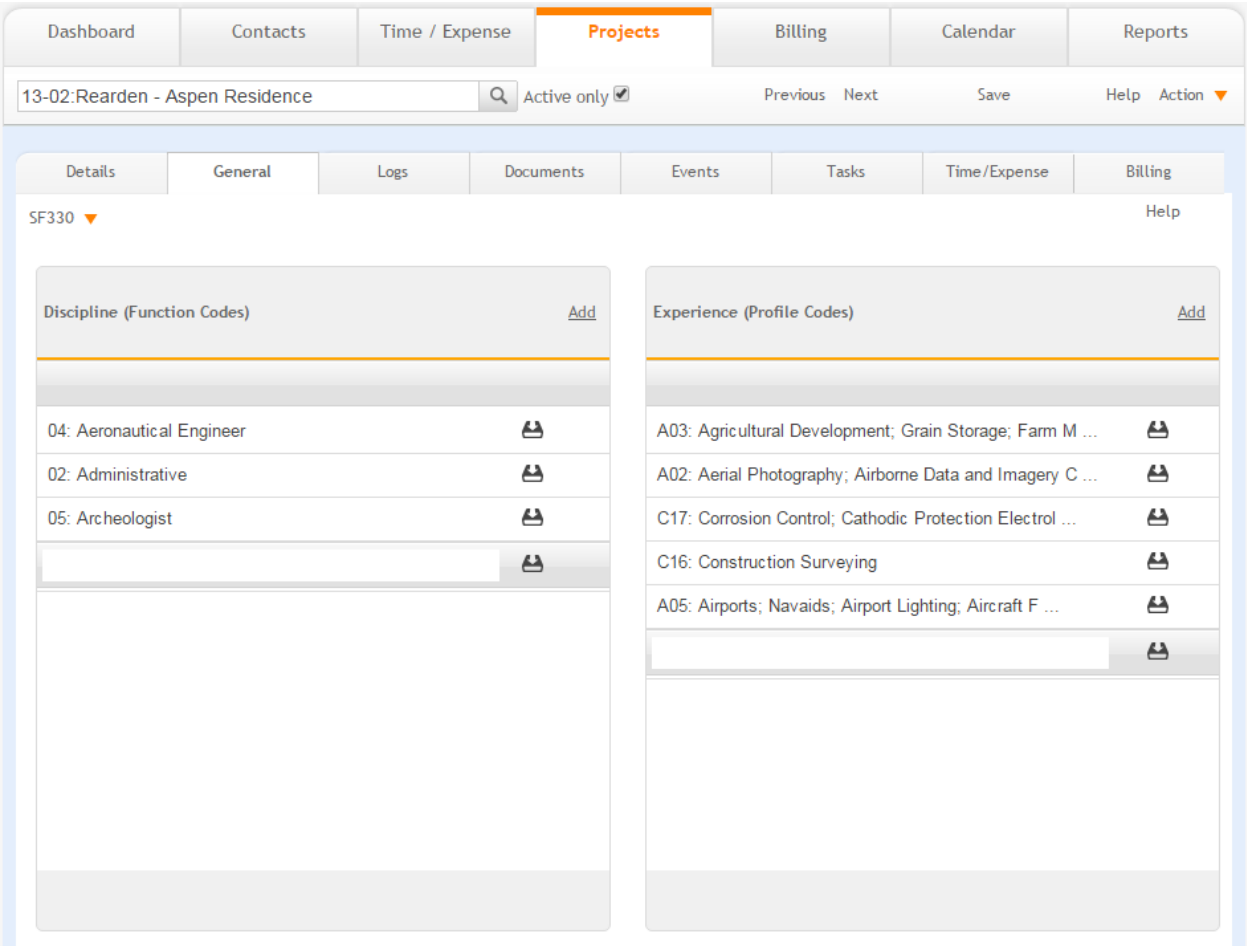
Help:
Opens the ArchiOffice Help in the Projects section.

PROJECTS - GENERAL - SF330

Architects must provide an SF330 document (that is, Standard Form 330) when bidding on government projects. This form requires a firm to detail its relevant disciplines and experience using *Function* and *Profile* codes. ArchiOffice users applying for such jobs can use the options on the SF330 screen to detail and store this detail with a project record.

The information specified on this screen can be printed with a custom report. Contact BQE Support for assistance on creating a customized report.

See Preferences - Project - SF330 for details on configuring the lists of codes available for selection.



Discipline (Function Codes)

Use the options in this section to select function codes that detail skills unique to your firm and its employees.

Add:
Click this link to add additional function codes. Click the drop-down list to select a code.

Save :
Click to save your changes.

Delete :
Click to remove a code from the list.

Experience (Profile Codes)

Use the options in this section to select profile codes that detail experience of your firm and its employees.

Add
Click this link to add additional Profile codes. Click the drop-down list to select a code.

Save :
Click to save your changes.

Delete
Click to remove a code from the list.

Button Panel

Help:
Opens the ArchiOffice Help in the Projects section.

Logs

PROJECTS - LOGS OVERVIEW

From the Projects - Logs screen, make a selection from the drop-down list to access and view the following log information and features:

Notes -Select to view a chronological history of all notes associated with a project.

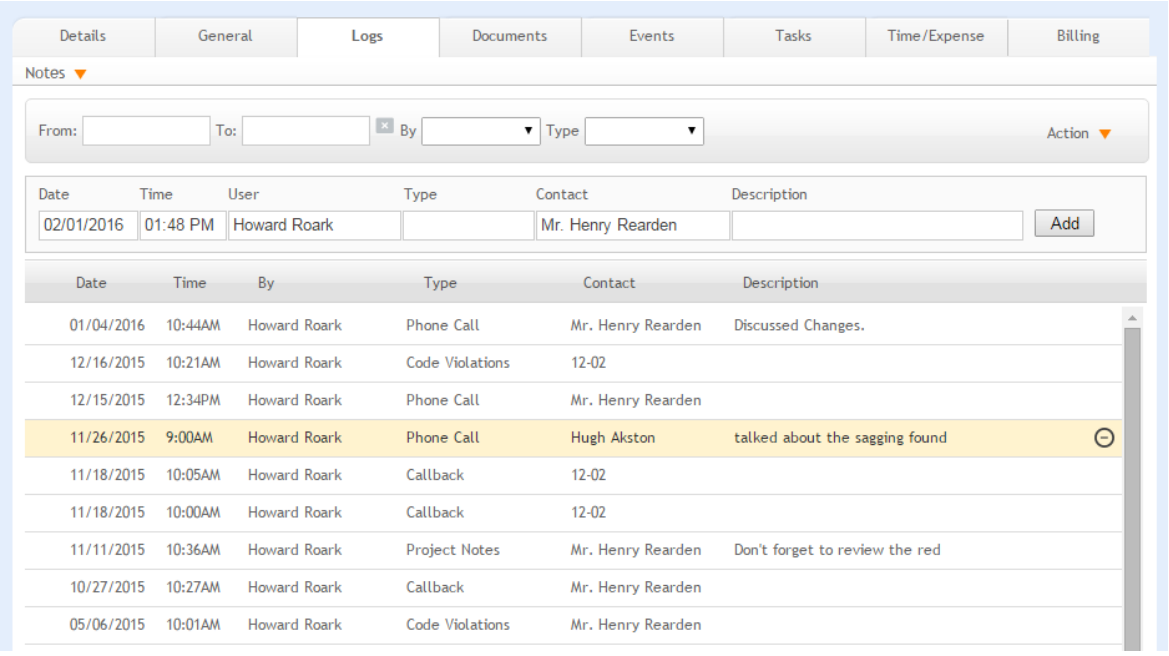
Submittals - Select to view a chronological history of all submittals associated with a project.

Drawings -Select to view a chronological history of all drawings associated with a project.

RFIs - Select to view a chronological history of all RFI (Request for Information) associated with a project.

PROJECTS - LOGS - NOTES

The Projects - Notes portal shows a chronological history of all notes associated with a project.



Filters

Use the portal filters to limit the displayed information to only notes of interest.

Click Clear to undo applied filters.

Action

New:
Select to create a new note.

List:
Select to display a list view of all notes in the portal.

Find:
Select to search for existing notes.

Help:
Opens the ArchiOffice Help in the Projects section.

Add
Click to add additional notes.

Grid

Edit:
Click on the row to view or edit details of the listed Notes.

Date:
The date on which a note was added.

Time:
The time stamp for which the note was added.

By:
The employee who created the note.

Type:
The note type (for example, phone call, meeting, etc.).

Note types are created using the Preferences - Project - Defaults screen.

Contact:
Individuals associated with the note (for example, employees or consultants). When creating a new note, ArchiOffice pre-fills the default contact name but you can change it.

Description:
Descriptive detail for the note.

Delete :
Click to remove the selected item from the portal.

Any column header can be selected to sort information by that category.

Button Panel

Search :
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field.

Active only:
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

List
Select to view a list of all projects.

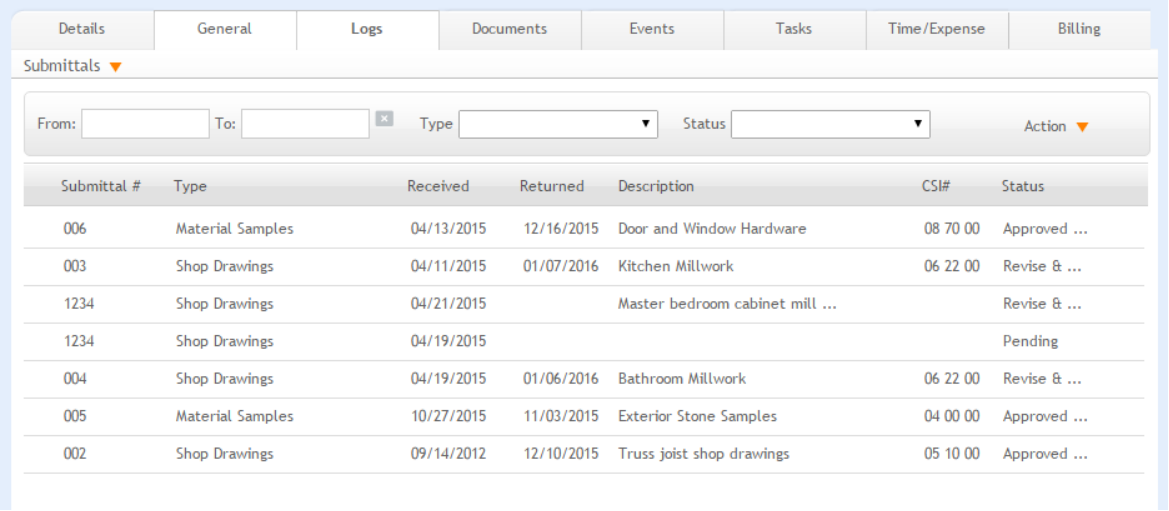
Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - LOGS - SUBMITTALS

The Projects - Submittals portal shows a chronological history of all submittals associated with a project.

This feature is only available in the ArchiOffice Enterprise edition.



Submittal #	Type	Received	Returned	Description	CSI#	Status
006	Material Samples	04/13/2015	12/16/2015	Door and Window Hardware	08 70 00	Approved ...
003	Shop Drawings	04/11/2015	01/07/2016	Kitchen Millwork	06 22 00	Revise & ...
1234	Shop Drawings	04/21/2015		Master bedroom cabinet mill ...		Revise & ...
1234	Shop Drawings	04/19/2015				Pending
004	Shop Drawings	04/19/2015	01/06/2016	Bathroom Millwork	06 22 00	Revise & ...
005	Material Samples	10/27/2015	11/03/2015	Exterior Stone Samples	04 00 00	Approved ...
002	Shop Drawings	09/14/2012	12/10/2015	Truss joist shop drawings	05 10 00	Approved ...

Filters

Use these filters to narrow the list of displayed submittals records.

Click Clear to undo applied filters.

Action

New:
Select to create a new submittal record.

List:
Select to display a list view of all submittals in the portal.

Find:
Select to search for existing submittals.

Help:
Opens the ArchiOffice Help in the Projects section.

Grid

Edit:
Click the row to view the details or to make changes to a selected submittal in the Submittal Detail View.

Submittal#:
The submittal record number entered when the record was created. This number should not exceed 10 characters.

You can modify the received and planned date from the Submittal Detail View screen.

Type:
The type of submittal (for example, Shop Drawings, Material Samples, etc.).

Submittal types are created using the Preferences - Project - Defaults screen.

Received:
The date on which the submitted material or drawing was received.

Returned:
The date on which the submittal was returned to the person who sent it for approval.

Description:
Descriptive detail for the submittal record.

CSI#:
The submitted drawing or material's CSI code.

Status:
The status of the submittal review process.

Delete :
Click to remove the selected item from the portal.

Any column header can be selected to sort information by that category.

Button Panel

Search  **:**
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field.

Active only:
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

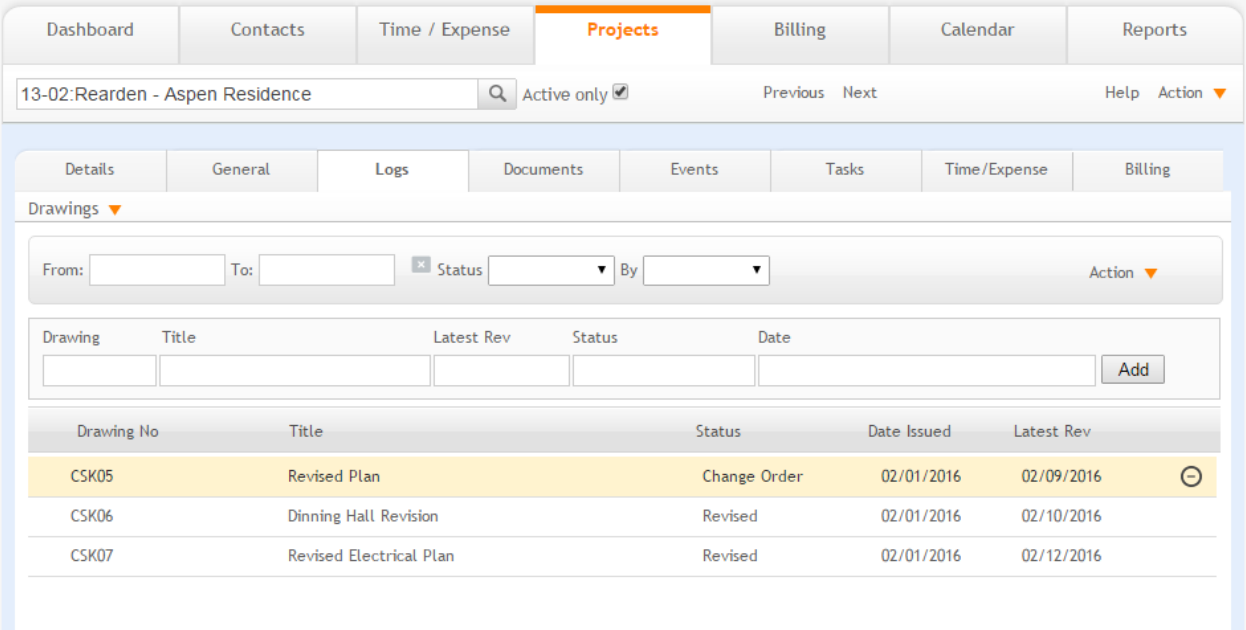
Action

> **New:**
> Select to create a new project.
>
> **Duplicate:**
> Select to duplicate an active project record.
>
> **Delete:**
> Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.
>
> **My List:**
> Select to view projects assigned to you.
>
> **List**
> Select to view a list of all projects.
>
> **Find:**
> Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.
>
> **Re-Find:**
> Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - LOGS - DRAWINGS

The Projects - Logs portal shows a chronological history of all drawings associated with a project.

This feature is only available in the ArchiOffice Enterprise edition.



Filters

Use these filters to display only drawings of interest. You can filter the list by date, drawing status or by the user that created the drawing record.

Drawing statuses are configured in the Project - Defaults preferences.

Action

New:
Select to access the Drawing Detail screen and add a new drawing.

List:
Select to display a list of all drawing you have added.

Find:
Choose this option to run a search for specific drawing records.

Help:
Opens the ArchiOffice Help in the Projects section.

Add:
This option provides a shortcut for adding a drawing record. Enter drawing details in the adjacent fields (for example, title, status, etc.) and then click **Add**.

Grid

Edit:
Click the row to make changes to a selected drawing in the Drawing Detail View.

Drawing No:
Displays an assigned number for the drawing.

Title:
Displays the title of the drawing.

Status:
Displays the status of the drawing -Revised, Change Order, Permit, Tender, etc.

Date Issued:
Displays the date on which the drawing was released for review.

Latest Revision:
Descriptive detail or comment on the latest revision made to the drawing.

Delete :
Click to remove the selected item from the portal.

Any column header can be selected to sort information by that category.

Button Panel

Search :
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field.

Active only:
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

> **New:**
> Select to create a new project.
>
> **Duplicate:**
> Select to duplicate an active project record.
>
> **Delete:**
> Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.
>
> **My List:**
> Select to view projects assigned to you.

List
Select to view a list of all projects.

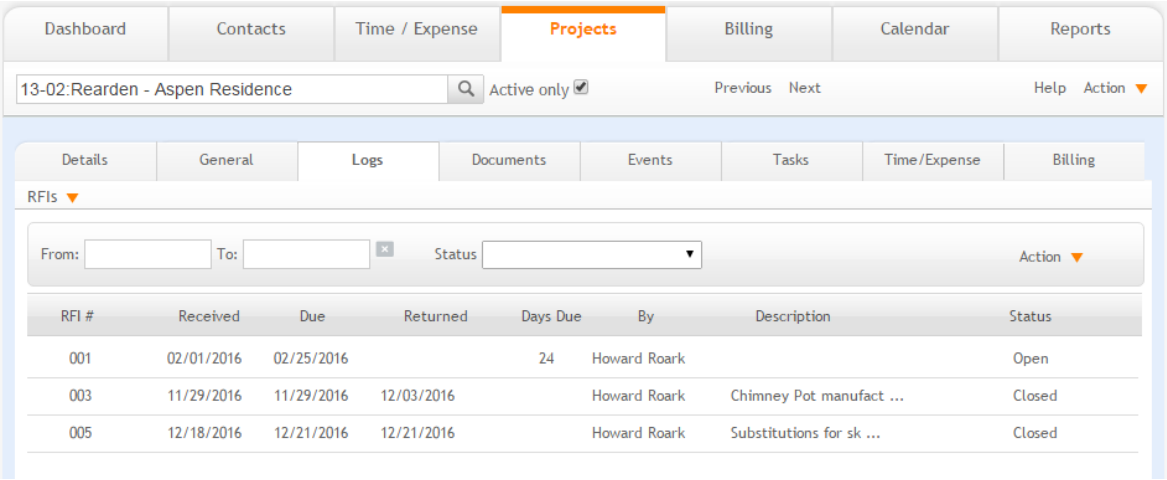
Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - LOGS - RFIS

The Projects - RFIs portal shows a chronological history of all RFI (Request for Information) associated with a project.

This feature is only available in the ArchiOffice Enterprise edition.



Filters

Use these filters to narrow the list of displayed RFI records.

Click Clear to undo applied filters.

Action

New:
Select to create a new RFI record.

List:
Select to display a list view displaying all RFI records.

Find:
Select to search for existing RFI records.

Help:
Opens the ArchiOffice Help in the Projects section.

Grid

Edit:
Click the row to make changes or view details to a selected RFI record.

RFI#:
This field displays an RFI number for the selected project.

Received:
The recorded date on which the RFI was received.

Due:
The date on which a response to the request is due.

Returned:
Displays the date on which the requested information is delivered.

Days Due:
The field displays the number of days the RFI has been overdue.

By:
The employee who created the RFI record.

Description:
Descriptive detail for the RFI.

Status:
The current status of the RFI. It is either open or closed.

Delete :
Click to remove the selected item from the portal.

Any column header can be selected to sort information by that category.

Button Panel

Search :
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field.

Active only:
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

List
Select to view a list of all projects.

Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - DOCUMENTS

This screen displays the document filing system used for the projects. Located on the file server, project documents are organized in a folder hierarchy (that is, folders and sub folders).

Project Documents

This section displays the file structure in which ArchiOffice documents are stored. This structure consists of folders and sub-folders. The files within a folder display in the document grid. Click the arrow by a folder or sub-folder to expand or collapse it.

Use Filter

Use the filters to narrow down the list of documents that display in the grid. You can apply filters by document type or title.

Grid

Please make sure you have the latest version of Java installed on your system to view the documents in Google Chrome.

Title:
Displays the document title or filename. You can click it to view a document in its native program (for example, Adobe Reader or AutoCad).

Description:
Displays the descriptive detail of a document.

Type:
Shows the document type (for example, Word, PDF, Excel, etc.).

Date:
Displays the date on which a document was created or modified.

By:
Displays the name of the person who added the document.

All:
Select a listed document by checking its box. You must first select an item to perform the desired action from the Action menu. If you click All, all line items on the grid are selected.

Show Detail :
Click to access detailed information about a document.

Clear:
Click to remove the selected item.

Files listed in the document grid are color coded to indicate whether a document is registered in the ArchiOffice database or has been moved or deleted.

Document Status	
Black	These are detected documents in the document folder specified in Preferences with corresponding records in the database.
Red	These files have corresponding records in the database, but have been moved or deleted from the document folder specified in Preferences.
Green	These are documents detected in the document folder specified in Preferences, which do not have a corresponding record saved in the database. To create records for these files in the database, select **Save All** from the *Action* drop-down list above the documents grid.

Button Panel

Rows:
Select the number of rows you want to see on the grid. The options range from 15 to 500. ArchiOffice memorizes the number of rows selected by you and displays the same next time you log in.

Action

New Document:
Select to create new documents based on a document template (over 70 included) and 'drill down' through the folders and sub-folders to locate documents of interest.

Save Selected Item:
Select to save your changes.

Save All:
When this option is selected, all the files and folders in the storage directory for a project that are not already saved in the database will be saved to it. Until files are added to the database, they will display in the Document view but you will not be able to view or edit detail information for them (for example, add descriptive detail or assign contacts).

This option is only available with the Pro and Enterprise editions.

Delete Selected Documents:
Click to delete the selected documents from the grid. You will be prompted to either delete the link to the documents or delete both the link and the documents.

Delete Selected Folders:
Click to delete the selected folders and its content. You will be prompted to either delete the link to the folders or delete both the link and the folders.

Delete Orphan Documents:
Click this option to remove all solo or orphan records in your project documents.

New Template Folder:
Select to add a document folder.

New Custom Folder:
Select this option to add a root directory or folder.

This feature is only available in the ArchiOffice Enterprise edition.

New Sub Folder:
Select this option to add a child directory or folder.

Move Document To:
Moves selected documents to another folder.

Move Folder To:
Moves selected folders to another folder with contents.

Set Project Folder:
Select this option to store a project's files in a location different from the document path selected in the Documents - Paths preferences. This setting is project specific.

Open Project Folder:
Select this option to open the folder in which the project files are stored.

This option is only available in the Enterprise edition.

View All:
Click this button to toggle on the *Show all as one list* option.

List
Select to look at all the current project documents in the List View.

Find
Select to search the project documents for files meeting only specific search criteria (Contents, Subject, Date, Author, etc.), returning the results as the found set and presenting them in the List View.

Button Panel

Search :
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field.

Active only:
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

List
Select to view a list of all projects.

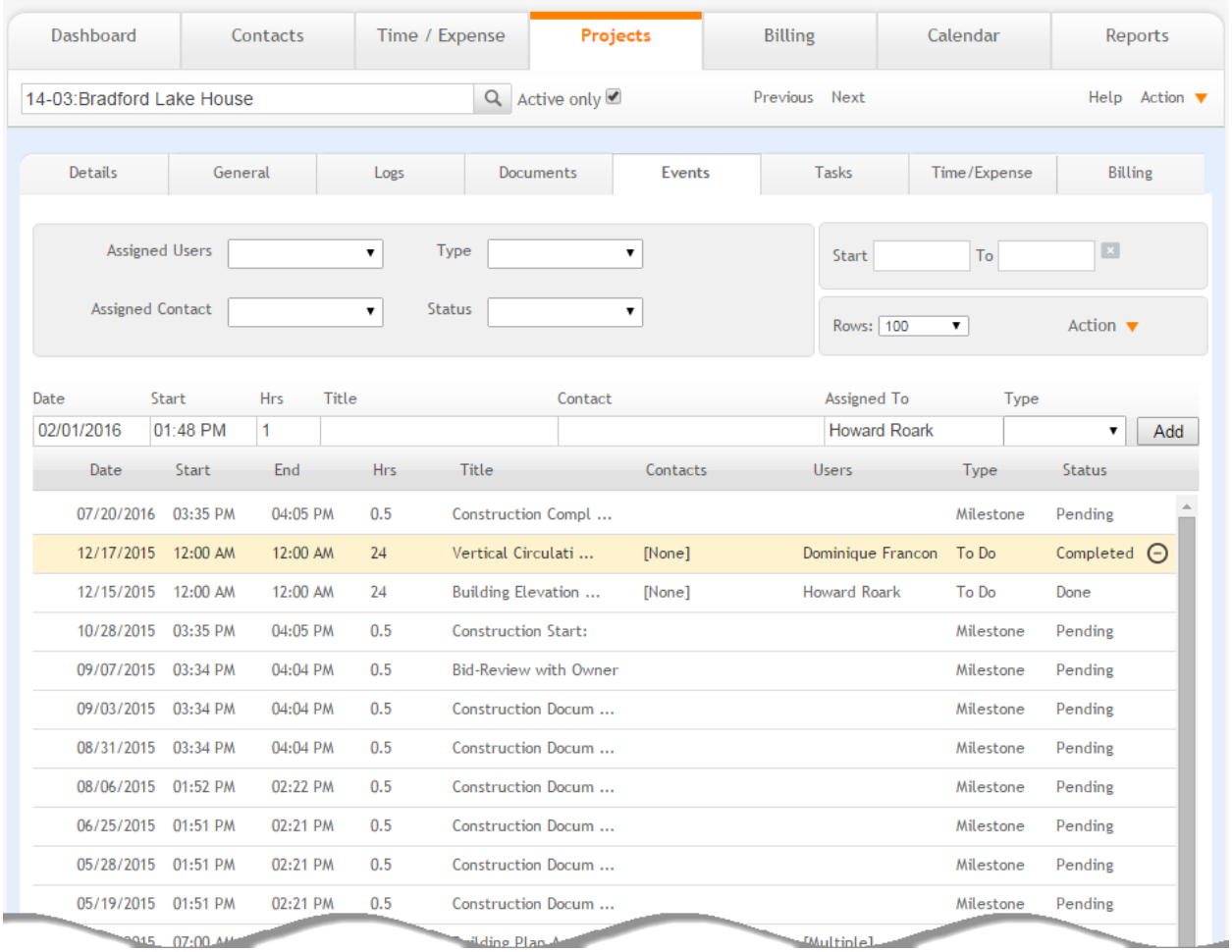
Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - EVENTS

This screen shows every appointment, milestone or To-Do item with a due date created for the projects.

Your ability to work with tasks (that is, create, assign resources, set due date, create a To-Do item, delete and complete) is strictly controlled by the security privileges assigned to you by the administrator.



Filters

You can filter the list of events by type, assigned team member or contact, or a specific date range. Any combination of filters can be used.

Rows:
Select the number of rows you want to see on the grid. The options range from 15 to 500. ArchiOffice memorizes the number of rows selected by you and displays the same next time you log in.

Action

New:
Select this option to add a new event to this project.

List:
Choose this option to display all current project events in a List view.

Add:
The Events portal includes an *Add Item* row that provides a shortcut for adding Events. Enter event details (for example, date, time, contact, etc.) in the adjacent fields and click this button to create the event.

Grid

You can click on a row to see an event's details.

Date:
Displays the date on which the event is scheduled.

Start:
Displays the event's start time.

End:
Displays the event's end time.

Hrs:
The time allotted for the event.

Title:
A description of the event.

Contacts:
Name of the event attendees. When creating a new event, ArchiOffice pre-fills the default contact name but you can change it.

Users:
The employee who created the event.

Type:
The type of event (for example, appointment, milestone, and to-do item).

Status:
Displays the event's status (for example, pending or completed).

Delete :
Click to remove the selected event from the grid.

Button Panel

Search :
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field.

Active only:
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

List
Select to view a list of all projects.

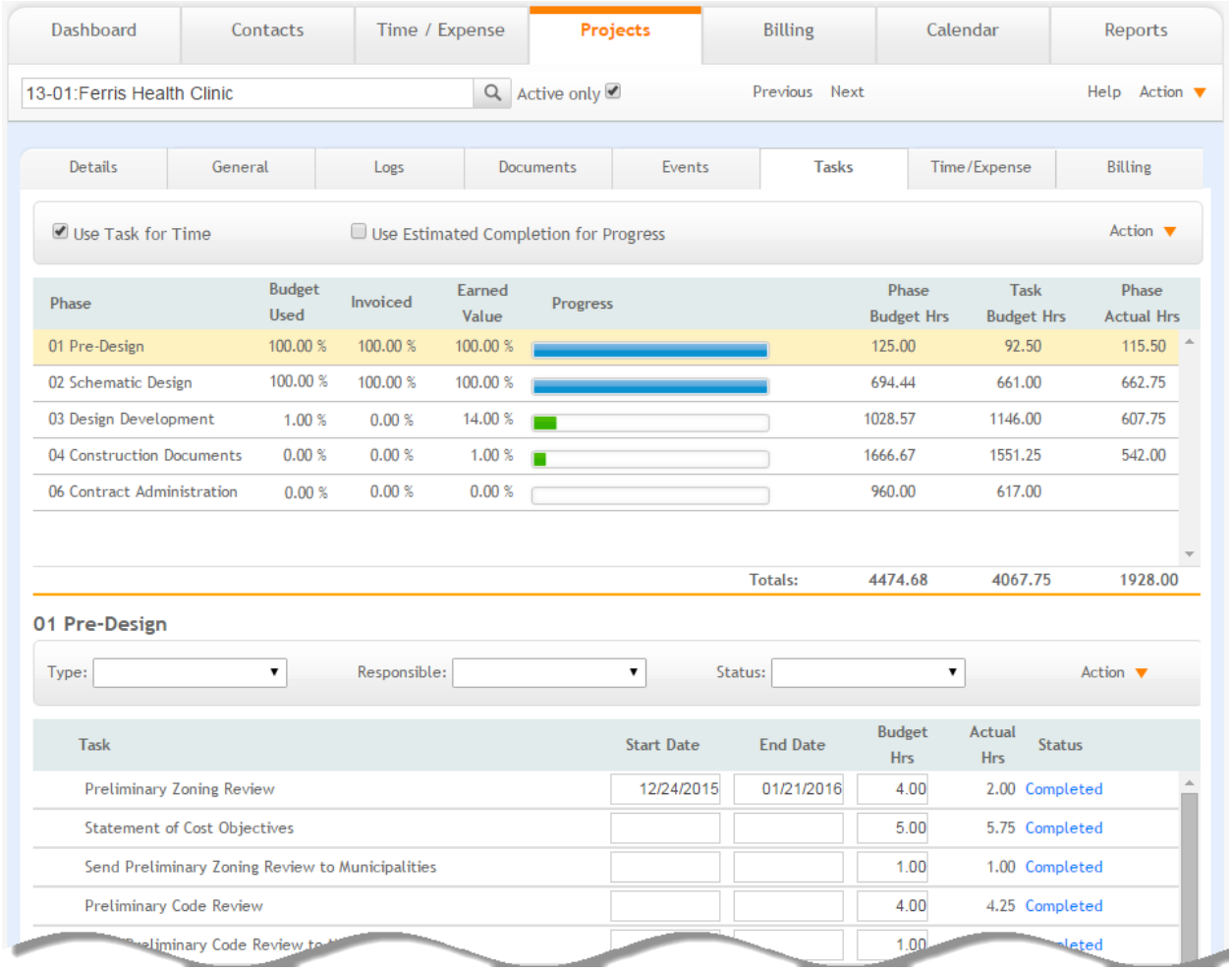
Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - TASKS

The Projects - Tasks screen displays the progress of each phase of a project based on the number of tasks completed. You can add, load or customize tasks for each project from this screen.

The Tasks feature is available in the Professional and Enterprise editions only.



Use Task for Time
The default tasks for the phases are defined and managed in Preferences - Project - Tasks. When this option is selected, tasks display in the time and expense grid of the Projects - Time/Expense screen. When you enter time for that phase, you will see a list of tasks in the time entry 'Description' field. You can choose the corresponding task because it is now recorded with the time entry as well as at the task level.

If this check box has been selected, when adding a sub-phase to a phase that has not been used to record a time or expense entry, all job codes, budget details, tasks, and time and expense entries are moved to the new sub-phase. Otherwise, the budget and job codes will be moved to the new sub-phase and you will be given the option to move the tasks.

Use Estimated Completion for Progress:
When this option is selected, the progress bars are based on the estimated completion values manually entered in Task Detail View.

Action

Save:
Select to save your changes.

Refresh:
Select to display the most current information in the phase grid.

Load:
Select to load all the master tasks for each phase of the project from the default task list, a predefined library of tasks for default phases. The master tasks are set up and added in the Preferences screen. This action does not overwrite any of the current tasks or their status; it just adds the missing tasks. If Preferences have been updated with new tasks, you can load these at the project level.

Phase Grid

Expand/Collapse:
Phases that have sub-phases have an arrow next to them. Click this arrow to toggle between hiding and viewing child phases.

Phase:
Displays the name of main and sub-level phases.

Budget Used:
Percentage of the budget assigned to the phase.

Invoiced:
Percentage of the budget that has been invoiced.

Earned Value:
The value in this column indicates the amount of work completed as a percentage.

The earned value analysis and comparison data is available in the ArchiOffice Enterprise and Professional editions only.

Progress:
This column provides a visual measure of a phase's progress.

Phase Budget Hrs:
This column shows the number of hours budgeted for each phase. This information is entered in the Project - Detail view.

Tasks Budget Hrs:
This column shows the number of hours budgeted for tasks. You can update these values in the task grid below.

Phase Actual Hrs:
The value in this column shows the actual number of hours completed for each phase.

Phase Details

Type
Make a selection from this drop-down list to filter the grid by task type.

Responsible:
Make a selection from this drop-down list to filter the grid by the employees responsible for the project.

Status:
Use this field to filter the list by completion status (for example, pending or completed).

Action

Save:
Choose this option to save changes made to task settings.

Main:
Select to add a root task.

Sub:
Select to add a child task to the selected task.

Move Up/Move Down:
Select one of these options to change the phase order.

Task Type:
Select this option to add new task types to the project. These are project specific.

My List:
Project tasks that you are actively involved with as a project team member can be viewed by selecting this option.

List:
Choose this option to display the current found set of project tasks.

Find:
Select this option to locate a particular project task and return a found set displaying the results in a List View.

Re-find:
Select to refine the last find you performed.

Task Grid

Edit :
To see the Task Detail View, click at the beginning of each row for the task and it will open it in the detail view.

Expand/Collapse:
Tasks that have sub-tasks have an arrow next to them. Click this arrow to toggle between hiding and viewing child tasks.

Task:
This column displays the name or description of the task.

Start Date:
This is the start date of the task, which can be edited.

End Date:
This is the task's end date, which can be edited.

Budget Hrs:
This defaults to zero, giving equal weight to each task in the phase. This can be changed so that some tasks have greater weight in calculating the completion progress of all tasks for the phase.

Actual Hrs:
This reflects the actual time logged to this task.

Status:
The current Status of the task (Pending, Completed, Not Applicable). Click on the status to move the task to the next stage.

Delete :
Click to remove the selected tasks.

Your ability to work with tasks (for example, create, assign resource, set due date, create a To-Do item, delete, etc.) is strictly controlled by the security privileges assigned by the administrator.

Button Panel

Search :
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field.

Active only:
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

List
Select to view a list of all projects.

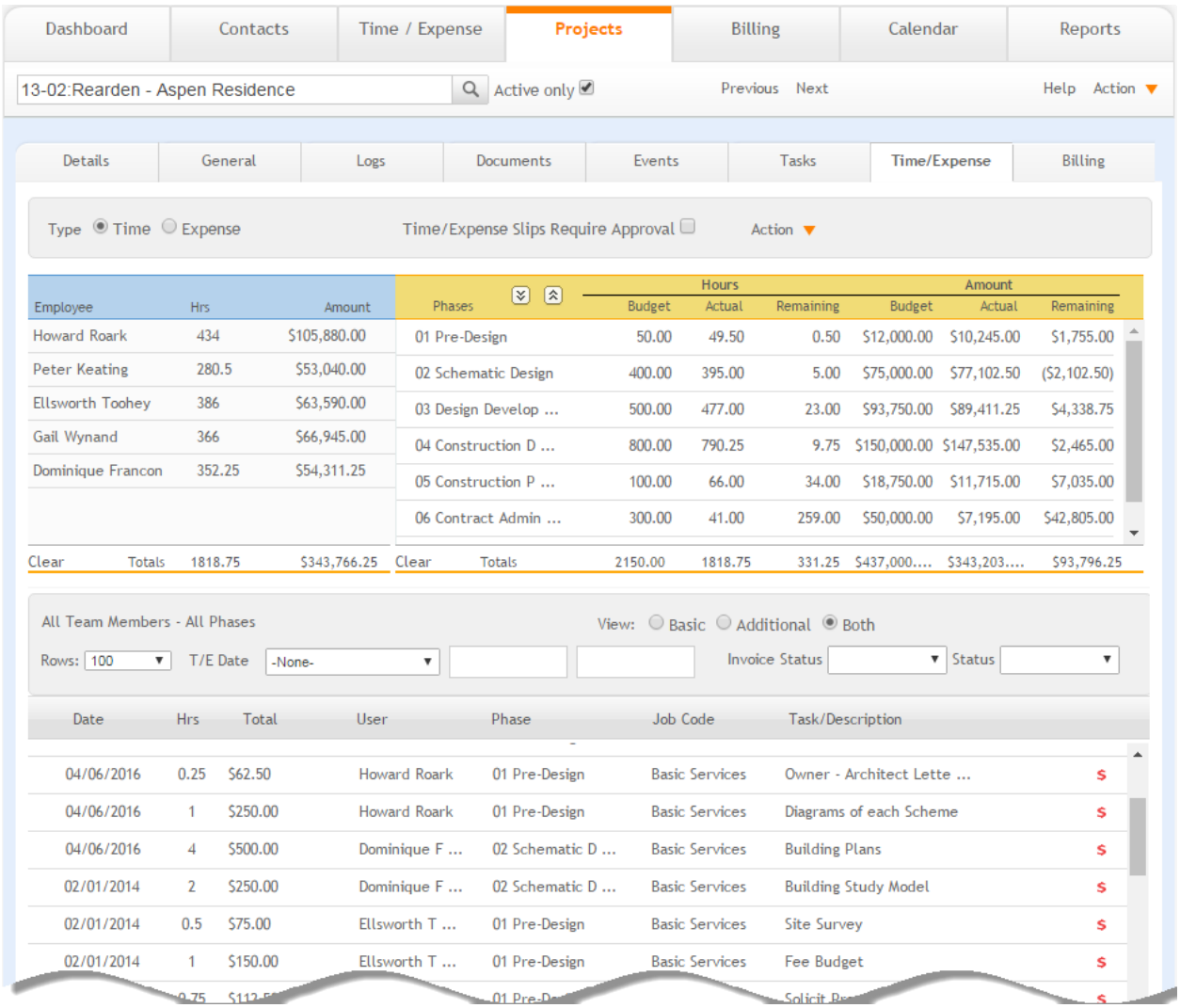
Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - TIME/EXPENSE

Project managers, administrators and other users can use the Time/Expense tab to view time and expense data entered for their projects.

This feature is only available in the ArchiOffice Pro and Enterprise editions.



Type:
Choose whether you want to filter the list of time and expenses by *Time* or *Expense*.

Time/Expense Slips Require Approval:
Select this check box to turn on/off the optional workflow process requiring all time and expenses to be reviewed and approved before they can be billed.

Action

New:
Select this option to add a new time or expense entry to the project.

List:
Select to look at all the current project's time and expense entries in the List View. With the list view, you can batch update a found set of entries.

Find:
Select this option to locate a particular time or expense and return a found set displaying the results in a List View.

Employee:
This grid lists the total invoiced hours, and time and expenses entered by employees working on a project. Select an employee in this list to display only entries entered for that employee in the Time/Expense screen. Click **Clear** to remove the *Employee* filter from the Slips portal. The employees appear in the same order here as they are set in the Projects-Details-Project Team screen. Also, the employees having no time and expense entries for a project are not displayed in the grid.

Phases:
This grid lists a project's phases and sub-phases. It displays the budgeted, actual, and remaining hours and amounts for each phase for the invoiced time and expenses. Select a phase to display details for time and expenses specifically entered for it in the Time/Expense screen. Click **Clear** to remove the *Phases* filter form the Slips portal.

> Click the arrows adjacent to the listed phases to display or hide their sub-phases.

> Some values (numbers) are truncated with . . . if they have more than two decimal places due to character limitation. You can hover your mouse over it to view the entire value.

All Team Members

This portal displays all the time and expenses entered by project team members. It includes invoiced and non-invoiced hours and amounts; therefore, the portal totals will not always match the totals in the *Employee* and *Phase* grids.

In addition to filtering data displayed on the time and expense portal by employee or phase, you can filter the portal to view time and expenses for a specific date range, type, or invoice status. Any combination of filters can be used. You must refresh the screen to view the relevant data.

The grid also displays the task or description associated with the time or expense entries. If the time and expense entry has a task, then it shows the task in the Task/Description column. If it has no task, it then displays the description.

Filter

Use the portal filters to view time and expenses for a specific date range, type, or invoice status. You can also select the number of rows to display on a page from the Rows drop-down. Any combination of filters can be used.

View:
Choose whether to list only *Basic Services*, *Additional Services* or Both.

All columns on the grid can be sorted by clicking on the column header. To see details for a specific time or expense entry, click on a row.

> Only authorized users can see the financial values. Unauthorized users can only view the hours.

The Approved and Unapproved status filters are visible only if the Time/Expense Slips Require Approval check box is selected.

When the Status filter is set to Unapproved, the list shows Complete and No Charge time only.

Button Panel

Search :
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field.

Active only:
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

List
Select to view a list of all projects.

Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

Billing

PROJECTS - BILLING OVERVIEW

From the Projects - Billing screen, you can make a selection from the drop-down list to access and view the following billing information and features:

Summary - Select this view to compare, on one screen, the project budget including dollars and time allocated, actual time and related fees as well as invoiced amounts and balances remaining to be billed. This view is a valuable way to see your current position on the project.

Budget - Choose this option to specify the budget for all project phases.

Invoices - Displays details for all finalized invoices that have been generated for the project (for example, Date, Invoice number, $ Capped Fees, $ No Cap Fees (Time and Material charges), $ Reimbursable Expenses, $ Interest, $ Tax and Total). Summary totals for each column are displayed as well as the total paid against the account and the project balance.

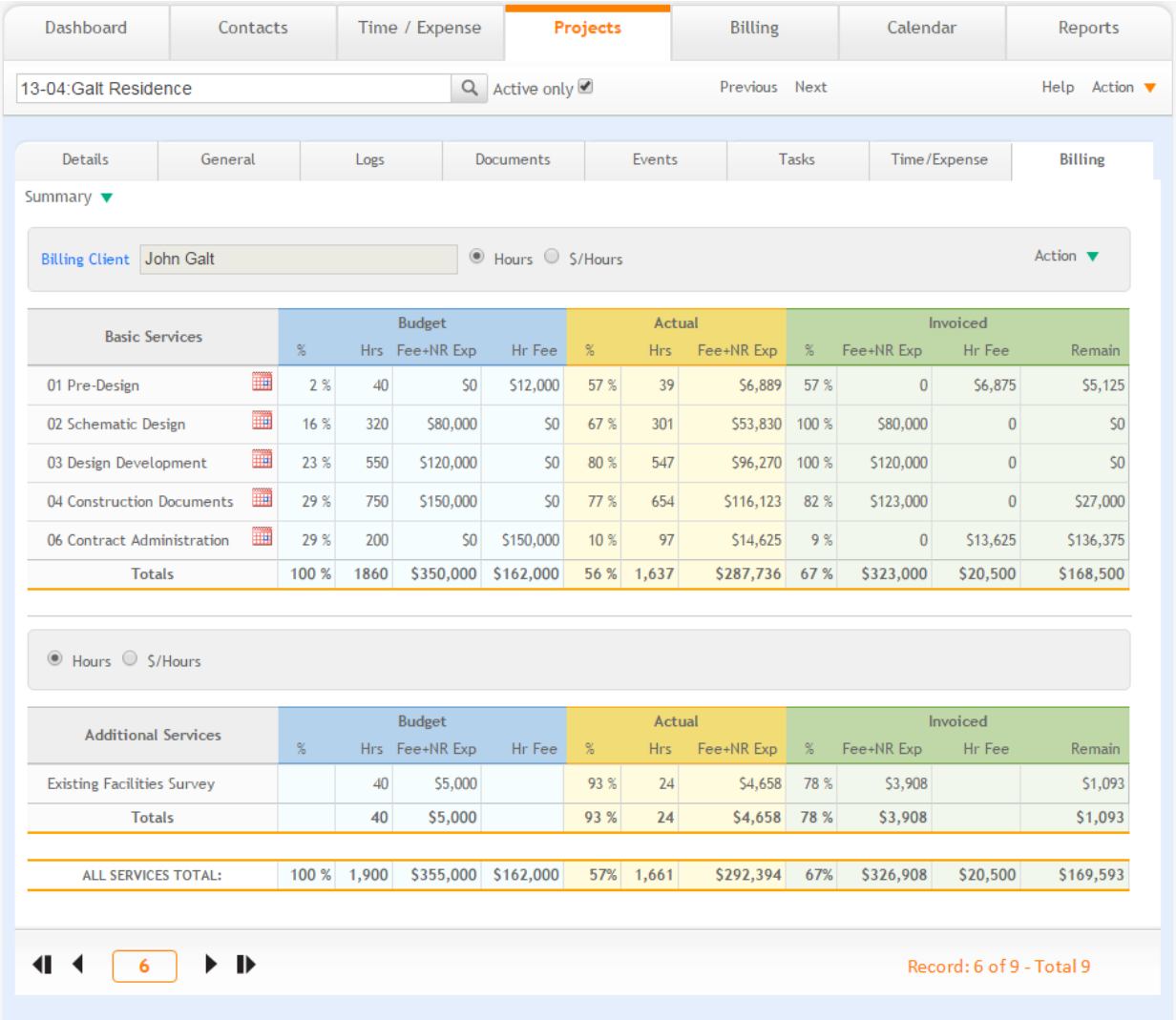
Transactions - Select to view all retainer deposits received, payments made against invoices, credits and refunds issued, along with summary totals and project balance.

Options - Select to specify a billing method (Stipulated Sum, Percent of Construction, Unit Cost, Hourly, and Multiple of DSE/DPE), set invoice format options, apply a tax model, specify interest and terms, apply adjustments and expense markups (% or $), specify phases to display on the invoice, invoice output options, and generate an invoice.

Performance - Select this option to view a snapshot of a project's progress. It shows a visual overview of hours worked for both basic and additional services. A bar chart compares the hours worked to date with the budgeted hours and hours over budget. The chart also details a project's cost and billed amount by services provided. In addition, you can get a quick view of the project's cost, earning and profitability as of the current date. These values can be viewed using either the accrued or cash accounting method.

PROJECTS - BILLING - SUMMARY

This screen displays all the summary financial data for a project, including the budget, actuals, and invoiced amounts.



Use this view to compare the project budget including dollars and time allocated, actual time and related fees as well as invoiced amounts and balances to be billed. This view provides valuable information about the status of a project.

As you record time and expense entries, project managers can monitor real-time actual to budget performance.

Basic/Additional Services
This view also shows invoiced amounts by phase and remaining balance to be invoiced by phase. Time and material (additional services) charges incurred on the project are displayed in the lower grid.

The % column in the Actual section = Actual Fee+ NR Expenses / Budget Fee + NR Expenses

If a phase has no budget ($0), then the Remaining field also displays $0. The Budgeted - Invoiced calculation is done only when a phase has a budget so as to avoid having negative values.

Calendar:
Click to open a calendar and display the Start Date and End Date fields. Use the calendar to select the dates on which the phase will begin and end. This allows you to know that a phase is budgeted at, say, $10,000 and the total time from start to finish is 4 months. In addition, related reports can show revenue forecasting based on the budgets and these dates. For example, if a phase was budgeted at $10,000 and the total time from start to finish is 4 months, the revenue forecast would be $2,500/month.

Sub-phases cannot be scheduled, only parent phases can.

Action

Create Invoice:
Click to create a new invoice (draft) for the selected project. ArchiOffice remembers the invoice date range and last invoice date of every project. So you do not have to continually enter the date each time you create an invoice or draft invoice. You can also overwrite the default invoice number and enter a custom invoice number when creating an individual invoice here.

Delete Draft:
Select this option to delete a draft copy of an invoice. You can view this option after creating a new draft invoice here.

Finalize Draft:
Select this option to finalize a draft invoice and post it. You can view this option after creating a new draft invoice here.

View Draft:
Select this option to view a draft version of an invoice.

Expand Phases:
Select to display all phases on the grid.

Collapse Phases:
Select to hide all phases on the grid.

Expand Job Codes:
Select to display all job codes on the grid.

Collapse Job Codes:
Select to hide all job codes on the grid.

Help:
Opens the ArchiOffice Help in the Preferences section.

Print Project Summary:
Select to print the Project Billing Summary report that displays the information seen on this screen.

Button Panel

Search  **:**
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field

Active Only:
Mark this check box to search the active projects only.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

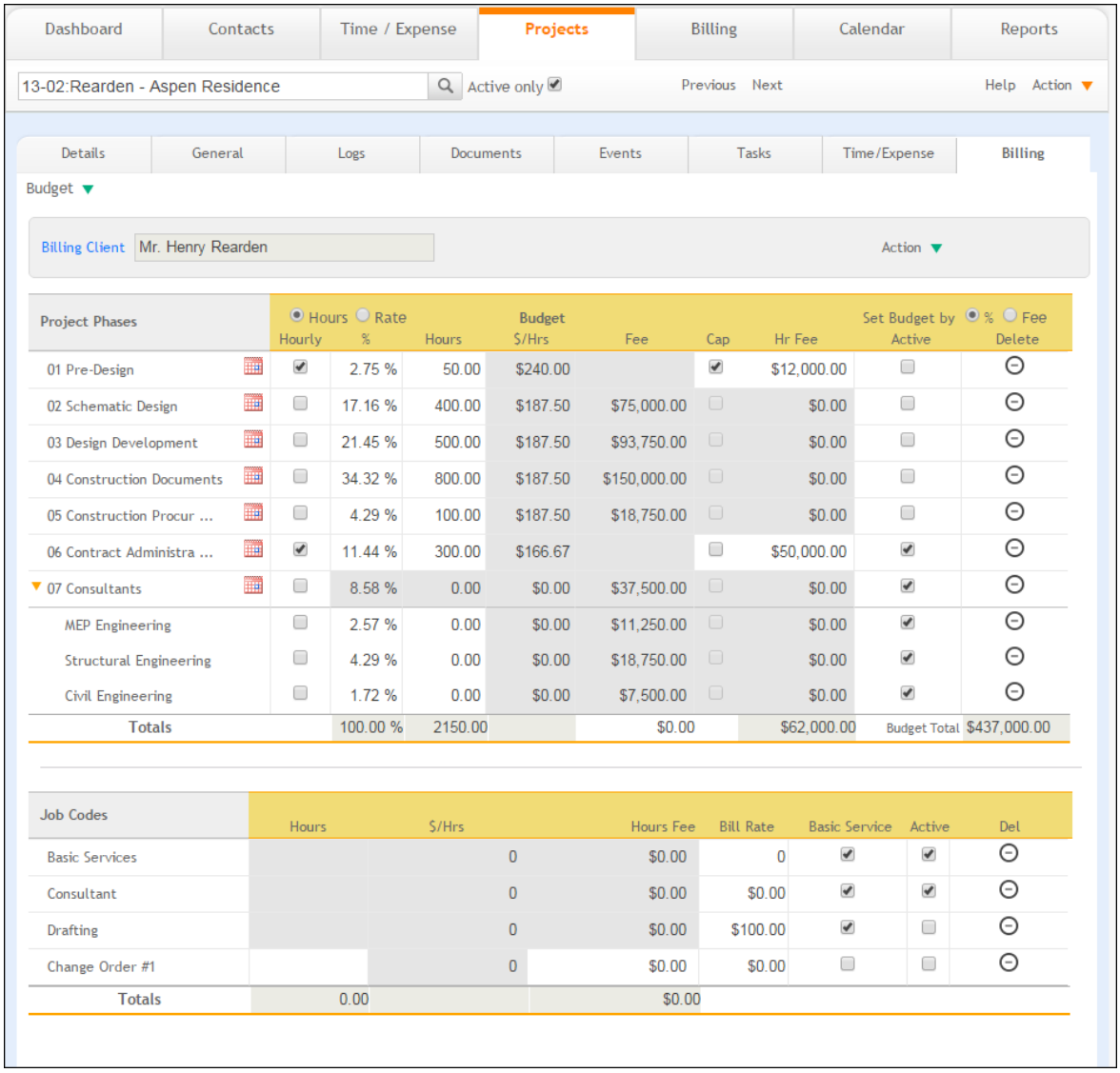
List
Select to view a list of all projects.

Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - BILLING - BUDGET

Use the options on this screen to specify the budget for all project phases. To access this screen, select **Budget** from the *Action* drop-down list on the Projects > Billing screen.



Project Phases

You can view the project phases and sub-phases by expanding or collapsing the list. These options are available under the Action drop-down.

Calendar:

Click to open a calendar and display the Start Date and End Date fields. Use the calendar to select the dates on which the phase will begin and end. This allows you to know that a phase is budgeted at, say, $10,000 and the total time from start to finish is 4 months. In addition, related reports can show revenue forecasting based on the budgets and these dates. For example, if a phase was budgeted at $10,000 and the total time from start to finish is 4 months, the revenue forecast would be $2,500/month.

Sub-phases cannot be scheduled, only parent phases can.

Hours/Rate:
Choose either option to set the allocated time by either hours or fee per hour. This allows you to budget the amount of hours budgeted for each phase or the anticipated average dollar per hour. Choosing the appropriate budget method will open the corresponding column to enter time budget numbers.

Hourly:
Use the hourly check box to designate a phase as being time and materials. All time and expense entries recorded in this phase will be billed as hourly charges, regardless if the project is for a fixed fee or not. Hourly fees are listed in a separate section on the invoice labeled as *Hourly Services*.

Hours:
These are the number of hours allocated to the phase in the budget.

$/Hrs:
This is the average rate per hour for the phase. This average rate is based on the fee entered and hours allocated to a particular phase.

Cap:
Select this check box to designate a phase with a not to exceed amount (that is, a Phase Cap). This is the total maximum amount the client will be billed, on this phase, for the life of the project. Any additional time and expense entries logged into the corresponding phase or job code will be billed at an extended value of $0.00.

Hr Fee:
The total budget amount for the project phase.

Set Budget By:
Project budgets can be established for each phase either by specifying a percentage of a total contract amount or by entering an actual amount allocated for each phase. Choosing the appropriate budget method will open the corresponding column to enter budget numbers.

This choice will also affect whether fix fee invoices can be billed by entering a %value or a $ value.

Active:
Select this check box to designate which phases are active in your project. Phases that are inactive are not available for users to enter time and expense entries against.

Delete:
Click ⊖ to delete a phase that is not part of a project's scope or contract.

You cannot delete a phase after there has been time applied to it. You must first move the time to another phase then proceed with deleting the unnecessary phase.

Job Codes

You can view the job codes by expanding or collapsing the list. These options are available under the Action drop-down.

Hours:
These are the number of hours allocated to the job code in the budget.

$/Hrs:
This is the average rate per hour for the job code. This average rate is based on the fee entered and hours allocated to a particular job code

Hours Fee:
The total budget amount for the job code.

You can assign the Hours and Hours Fee or $/Hrs and Hours Fee to the Additional Services, depending on the option (Hours or Rate) selected above.

Bill Rate:
You can specify a bill rate for a particular job code that takes precedence over a team member's billing rate on any new time and expenses entered with this job code.

Basic Service:
Select this check box to have a job code charged against the contract fee. If the job code is to be billed in addition to or on top of the contract fee, then you leave the Basic Service box unchecked and that time or expense will be charged as an additional service (that is, time and material above the contract fee) on the next invoice.

You cannot change a job code from basic or additional service after applying time to that job code or invoicing that time.

Active
Select this check box to designate which job codes are active in a project. Inactive job codes are not available for users to choose when entering their time and expense entries.

Del:
Click ⊖ to delete a job code that is not part of a project's scope or contract.

You cannot delete a job code after there has been time applied to it. You must first move the time to another phase then proceed with deleting the unnecessary job code.

Action

Create Invoice:
Click to create a new invoice (draft) for the selected project. ArchiOffice remembers the invoice date range and last invoice date of every project. So you do not have to enter the date each time you create an invoice or draft invoice. You can also overwrite the default invoice number and enter a custom invoice number when creating an individual invoice here.

Delete Draft:
Select this option to delete a draft copy of an invoice. You can view this option after creating a new draft invoice here.

Finalize Draft:
Select this option to finalize a draft invoice and post it. You can view this option after creating a new draft invoice here.

View Draft:
Select this option to view a draft version of an invoice.

Save Phases:
Select this option to save or update the phase information.

Expand Phases:
Select to display all phases on the grid.

Collapse Phases:
Select to hide all phases on the grid.

Save Job Codes:
Select this option to save or update the job code information.

Expand Job Codes:
Select to display all job codes on the grid.

Collapse Job Codes:
Select to hide all job codes on the grid.

Help:
Opens the ArchiOffice Help in the Projects section.

Button Panel

Search  **:**
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field

Active Only:
Mark this check box to search only active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

List
Select to view a list of all projects.

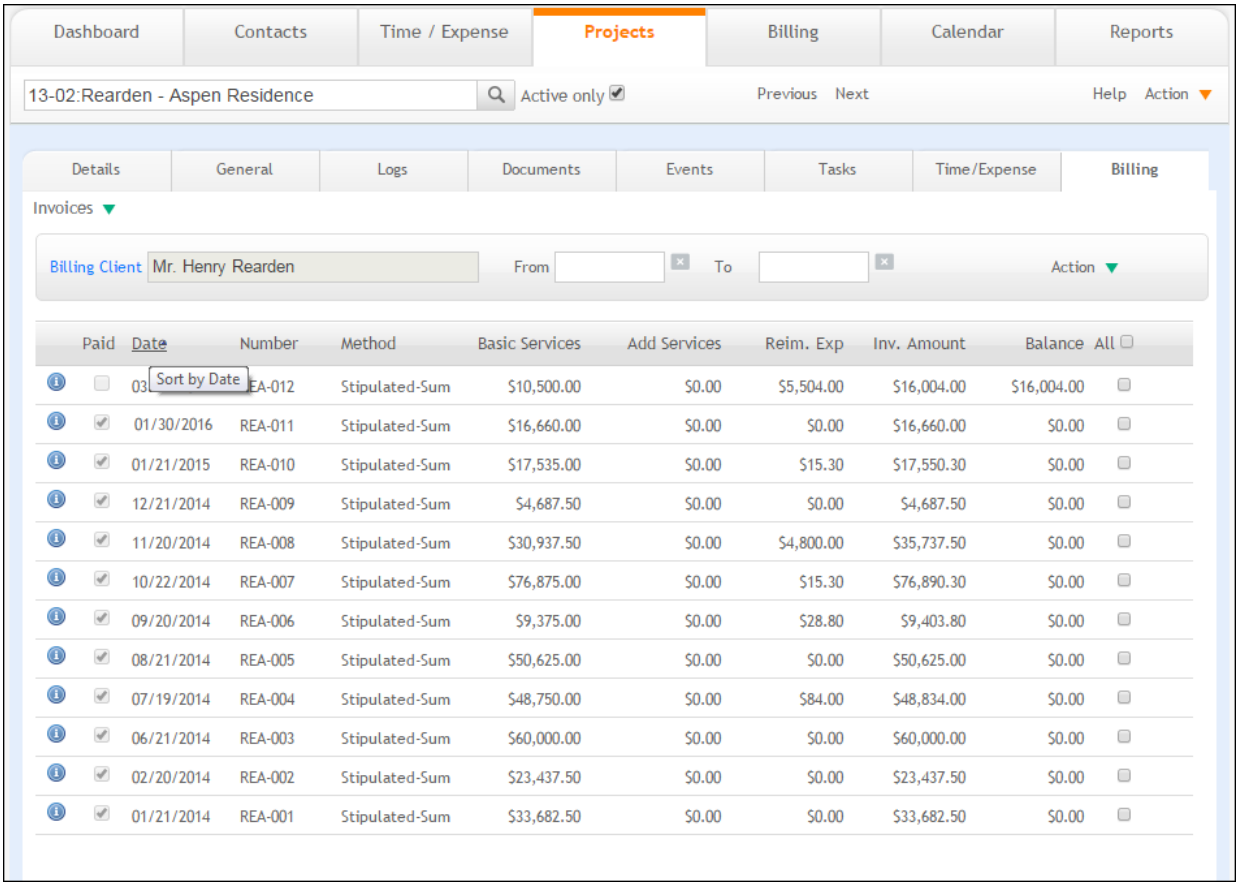
Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - BILLING - INVOICES

This view displays details for all finalized invoices that have been generated for the project such as billing method, time and material charges, and reimbursable expenses. You cannot create invoices for internal projects, as they are non-billable. Summary totals for each column are displayed as well as the total paid against the account and the project balance. You can view legacy invoices also as long as their PDFs exist in the system.

Non-reimbursable expenses will be set to Draft/Billed status but not appear on invoices. Reimbursable no-charge expenses and no-charge time entries will display on invoices as *No Charge*.



Billing Client:
Use the Billing Client link to navigate to the client's contact information.

From-To:
Use these date filters to display invoices for a specific date range.

Action

Create Invoice:
Select this option to create a new invoice from this view. ArchiOffice remembers the invoice date range and last invoice date of every project. So you do not have to enter the date each time you create an invoice or draft invoice. You can also overwrite the default invoice number and enter a custom invoice number when creating an individual invoice here. To learn more about what the invoice will look like, review the invoice sample.

Delete Draft:
Select this option to delete a draft copy of an invoice.

Finalize Draft:
Select this option to finalize a draft invoice and post it.

Creating a draft invoice or deleting it does not increment your next invoice number until that invoice is finalized. When draft invoices are finalized, ArchiOffice looks at the invoice numbers of all existing invoices to determine the next highest number

and sets the default in Preferences to that number. This helps in preventing gaps in the numbering sequence.

View Draft:
Select this option to view a draft version of an invoice.

List:
Select this option to see all the invoices for this project.

Find:
Select this option to locate specific invoices.

Email Selected Invoices:
Click to email the invoices selected on the grid to the clients. It opens the Email screen. You can add a custom message before the email is sent.

The Email feature for invoices is available in the ArchiOffice Pro and Enterprise editions only.

Help:
Choose this option to open the ArchiOffice Help in the Projects section.

Invoices Grid

Edit :
Click to view or edit invoice details. You can also delete an invoice. You can open an invoice directly by clicking the invoice number or date.

When deleting an invoice, all associated time and expense entries are set back to the unbilled status so the invoice could be regenerated after time and expense corrections have been made.

Paid:
Displays the total amount paid toward the invoice, if any.

Date:
Date on which the invoice was created.

Number:
Invoice number associated with the selected invoice.

Method:
Displays the billing method used for the associated project (i.e., Hourly Rate, Stipulated Sum, Multiple of DSE/DPE, Percent of Construction, or Unit Cost).

Basic Services:
Displays the amount of the basic services.

Add Services:
Displays the amount of the additional services.

Reimbursable Expenses:
Displays the amount of reimbursable expenses.

Invoice Amount:
Displays the total invoice amount based on the services, expenses, adjustments and taxes applicable to it.

Balance:
This displays the balance amount that the client owes on the invoice.

All:
Mark or unmark this check box to select or deselect all the listed invoices.

Total Paid:
Displays the total amount paid toward the invoice, if any.

Project Balance:
This displays the balance amount that the client owes for all outstanding invoices on projects they currently have in the system.

Print Statement:
Click this link to generate a printable statement for a project.

Print Summary:
Click this link to generate an invoice summary for a project.

Print Client Statement:
Click to preview the Outstanding Invoices report. This statement not only displays the outstanding invoices for the selected project, but also shows the other projects of the client that have outstanding invoices.

Button Panel

Search  **:**
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field

Active Only:
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

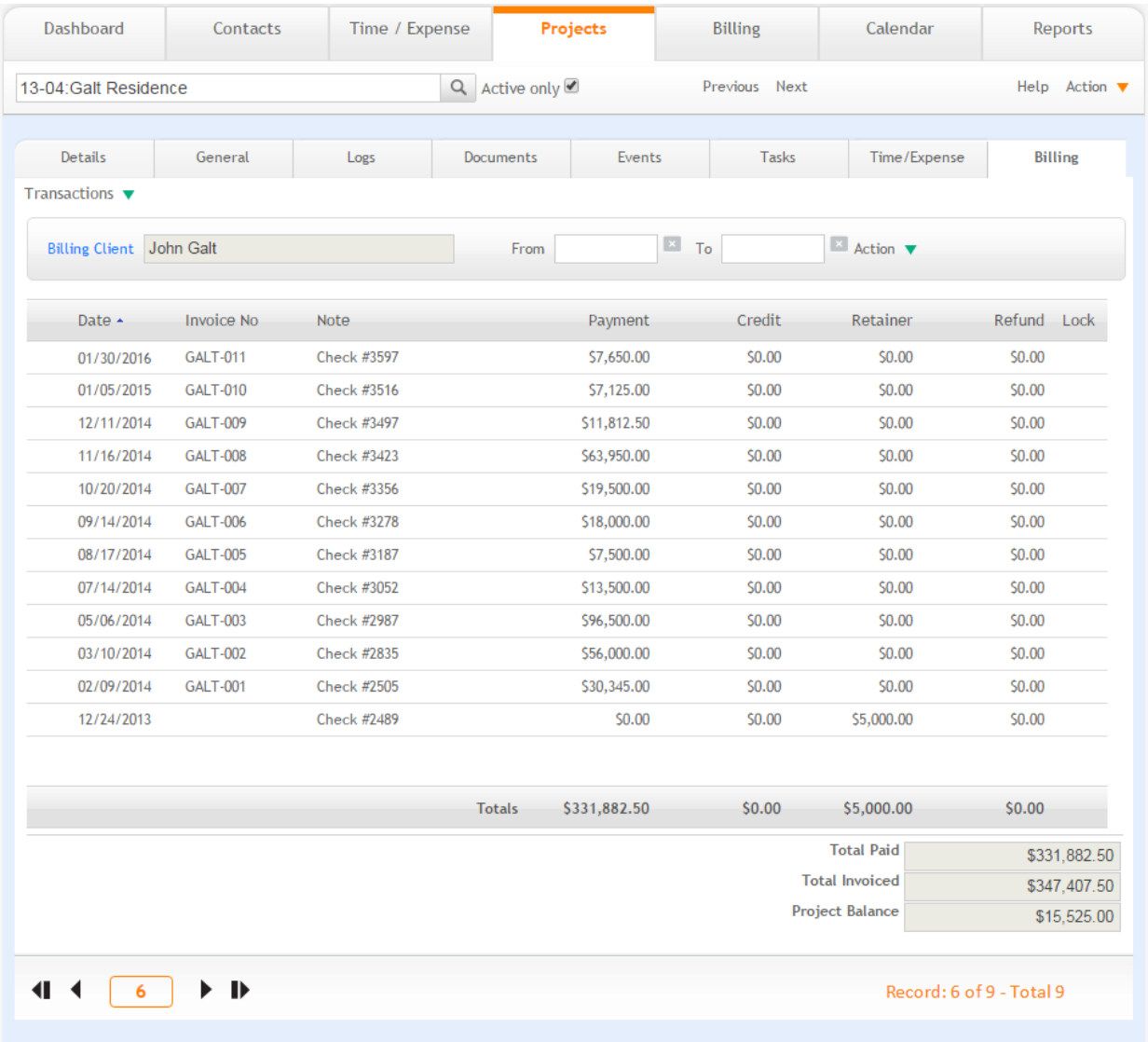
List
Select to view a list of all projects.

Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - BILLING - TRANSACTIONS

The Projects - Billing - Transactions screen shows all retainer deposits received, payments made against invoices, credits and refunds issued, along with summary totals and project balance. You can enter new transactions from here as well.



ArchiOffice does not allow you to apply a credit (liability) directly to a project. Credits can only be applied to open invoices and cannot exceed the invoice amount.

Billing Client
Click this field label to view a client's contact information.

Filter
Use the filters to display only transactions of a specific date range.

Action

New Transaction:
Select to create a new transaction.

Create Invoice:
Click to create a new invoice (draft) for the selected project. ArchiOffice remembers the invoice date range and last invoice date of every project. So you do not have to

enter the date each time you create an invoice or draft invoice. You can also overwrite the default invoice number and enter a custom invoice number when creating an individual invoice here.

Delete Draft:
Select this option to delete a draft copy of an invoice. You can view this option after creating a new draft invoice here.

Finalize Draft:
Select this option to finalize a draft invoice and post it. You can view this option after creating a new draft invoice here.

List
Select to see all the transactions posted for this project.

Find
Select to search for transactions matching specific search criteria, returning the results as the Found Set and presenting them in the List View.

Help
Opens the ArchiOffice Help in the Projects section.

Grid

This grid displays a list of project related transactions. It can be sorted by column. Click a column header to toggle sorting between descending and ascending order.

View Transaction Details
Click a transaction entry to see detailed information.

Date:
Displays the date on which the transaction was created.

Invoice No:
Invoice number associated with the selected transaction.

Note:
Displays comments or description saved with the transaction.

Transaction Type:
The type of transaction recorded: payment received, retainer applied, credit issued or amount refunded.

Lock:
Displays users restricted from modifying any record.

Button Panel

Search  **:**
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field

Active Only:
Mark this check box to search only the active projects.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

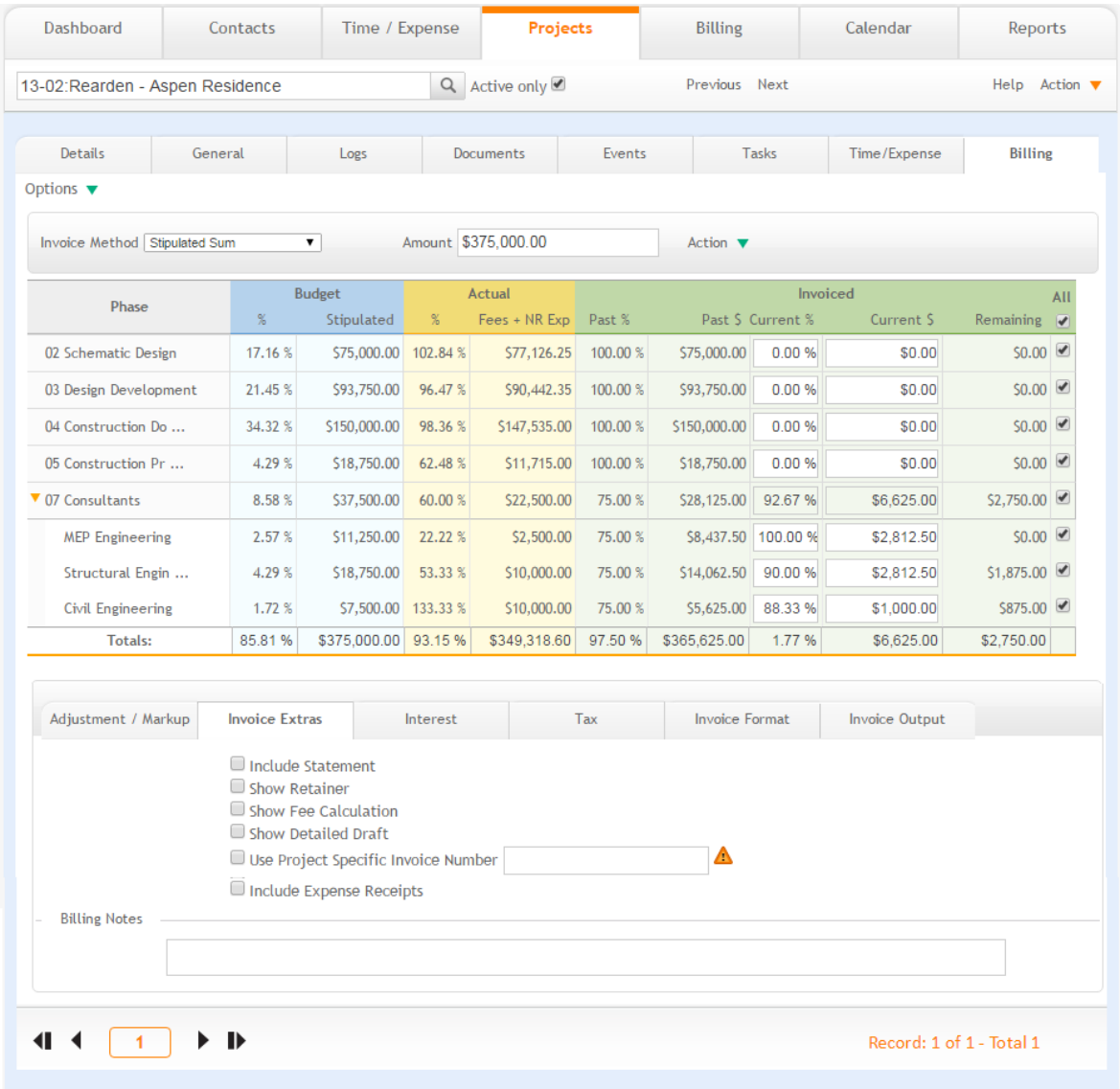
List
Select to view a list of all projects.

Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

PROJECTS - BILLING - OPTIONS

The Options screen is used to specify a billing method (that is, Stipulated Sum, Percent of Construction, Unit Cost, Hourly Rate or Multiple of DSE/DPE), set invoice format options, apply a tax model, specify interest and terms, apply adjustments and expense markups (% or $), specify phases to display on the invoice, invoice output options, and generate an invoice.



Invoice Method
Specify the method of invoicing your time and expense entries. You can choose the invoicing method as Hourly Rate, Stipulated Sum, Multiple of DSE/DPE, Percent of Construction and Unit Cost.

The settings available on this screen are dependent on the selected invoice method.

Cap:
Select this check box to designate a limit for billing. This is the maximum amount the client will be billed over the life of the project (that is, a project cap). This option is only available when either the *Hourly Rate* or *Multiple DSE/DPE* invoice methods are selected.

Percentage:
Enter the percentage of the project value on which the fee is based. This option is only available when the *Percent of Construction* invoice method is selected.

Construction Value:
Enter the total project value. This option is only available when the *Percent of Construction* invoice method is selected.

Fee:
This read-only field displays the billable fee when the *Percent of Construction* invoice method is used.

Size:
If the *Unit Cost* invoice method is selected, enter the measurements of the project (for example, 1,250,000 Sq.ft).

You can use feet or meters as a unit of measurement.

Rate:
If the *Unit Cost* invoice method is selected, enter the rate charged per unit (for example, 0.10 Sq. ft).

Amount:
Amount to be invoiced.

Action

New:
Select this option to create an invoice. ArchiOffice remembers the invoice date range and last invoice date of every project. So you do not have to enter the date each time you create an invoice or a draft invoice. You can also overwrite the default invoice number and enter a custom invoice number when creating an individual invoice here.

Save:
Select this option to save changes to the billing options.

Find:
Choose this option to search for specific invoices.

List:
Select to the List view and display the current found set of invoices.

View Draft:
Select this option to view a draft of a generated invoice.

Delete Draft:
Select this option to delete a draft copy of an invoice.

Finalize Draft:
Select this option to finalize a draft invoice and post it.

Finalize Draft and Print:
Select this option to finalize a draft invoice, assign the finalized invoice number, and print it.

Apply Retainer and Finalize Draft:
Select this option to apply a retainer amount to a draft invoice, and then finalize and post it. The amount paid from the retainer displays on the invoice.

Apply Retainer, Finalize Draft and Print:
Select this option to apply a retainer amount to a draft invoice, then finalize and print it. The amount paid from the retainer prints on the invoice.

From the accounting perspective, when retainers are applied on an invoice, this transaction debits the Unearned Retainer account and credits the A/R account.

Help:
Opens the ArchiOffice Help in the Projects section.

Billing Notes:
You can use these notes to record important information related to billing. They can also be used to provide billing instructions by the project manager to the billing person or accountant.

Fixed Fee Invoicing Grid

This grid displays when a fixed fee billing method (that is, Stipulated Sum, Percent of Construction and Unit Cost) is selected. It shows the budgeted, actual and invoiced amounts for each phase.

Specify Phase Billing Amounts:
You can specify the amount to be billed per phase by entering a value in either the *Current %* or *Current $* column, regardless of how your budget was set. For example, if your budget was set by fee you can set the invoice value by percentage.

Select Phases to Include on Invoice:
You can specify which phases are displayed and billed on a generated invoice by selecting the check box in the last column of the grid. You can select or deselect all phases and sub phases by marking the All check box accordingly.

This only affects basic services on non-hourly phases. Basic service time on hourly phases will still show on invoices when this check box is cleared. Also expense entries and additional service time, on any phase, will always show on the generated invoice, unless the *Invoice Time* and *Invoice Expense* options on the *Invoice Format tab* are unavailable.

Adjustment/Markup Tab

Adjust:
Specify if you want to apply any adjustments to your invoices. You can choose whether to apply adjustments to each individual time entry included on an invoice or to the total invoice charges.

This option is only available when either the *Hourly Rate* or *Multiple DSE/DPE* invoice methods are selected.

Adjust By:
You can specify whether to apply your adjustments by percentage or dollar amount. Enter the adjustment amount you want to apply on the invoice.

Apply To:
Specify whether you want to apply your adjustments to time entries or expense entries or to the total amount for time and expense entries.

Description:
Describe briefly the nature of adjustment.

Expense Markup:
You can specify whether to apply a markup to your expense by percentage or dollar amount. Enter the amount by which you want to mark up your expenses.

Invoice Extras Tab

Include Statement:
You can simultaneous generate an Outstanding Invoices statement while generating an invoice.

Show Retainer:
By default, no activity in the retainer account will be shown on the invoice; however, you must check this box if you want to show the retainer balance on all invoices.

Show Fee Calculation:
Select this check box to display the percentage used to calculate your project fee. This option is only available when the *Percent of Construction* invoice method is selected.

Show Detailed Draft:
Select this check box to display the draft invoice with detailed time and expense records associated with it.

Use Project Specific Invoice Number:
If you want to modify the invoice number for a specific project, just change it here. Checking this option overrides the project number settings in the Preferences screen.

Include Expense Receipts:
Check this option to generate a report with images of the receipts attached to the expense slips on an invoice. This report displays the expense receipts in JPG, PNG and GIF format only. All other formats are ignored.

This feature is available in the ArchiOffice Enterprise edition only.

Interest Tab

Payment Term:

Choose the payment terms for the project. Payment terms represent the number of days after the creation of the invoice to set the due date. This due date defines when an interest is determined to be late, if unpaid.

Interest Term:
Choose the interest terms for the project. Interest terms represent the number of grace period days after the due date, before late interest starts accruing.

Annual Rate:
Specify the annual rate to be used for all late interest accrued on unpaid invoices.

Compound Interest:
Specify whether or not to use compound interest.

Tax Tab

Tax Method:
Use this field to specify a tax model for this project: No Tax, Flat Tax, Two Rates, or time and expense entry Specific.

Rate:
Use this field to override the rates set up in Tax preferences. The rate field labels are dependent upon the selected tax method.

The default tax model and tax rate field labels (that is, GST, PST, etc.) are configured in Tax preferences.

Update:
Click this button to apply the new tax model to all time and expense entries for this project that have not yet been billed.

Invoice Format Tab

Group By
From the drop-down, choose whether to summarize the items on your invoice by code/phase. Choose *None* for no summarizations. This option is only available when either the *Hourly Rate* or *Multiple DSE/DPE* invoice methods are selected.

Time:
Check the Invoice Time check box to invoice your time entries. From the drop-down, choose how to summarize the items on your invoice. Check the relevant check boxes if you want to show billed hours and rates or want to include basic services and additional services in your invoices. This option is only available when either the *Hourly Rate* or *Multiple DSE/DPE* invoice methods are selected.

Expenses:
Select the Invoice Expense check box to invoice your expense entries. From the drop-down, choose how to display the items on your invoice. If you set the expenses to 'Summarize by Expense', this will create a line item under the reimbursable expense section that identifies each expense item separately.

Select the relevant check boxes if you want to show billed quantity and rates on your invoices. This option is only available when either the *Hourly Rate* or *Multiple DSE/DPE* invoice methods are selected.

Balance Due:
You are provided with some options that allow you to control what appears on your invoices. You can choose to show the invoice total or project balance on your invoice.

If the Show Retainer check box is selected on the Invoice Extras tab, the retainer payment information along with the project balance or invoice total (depending on your selection) is displayed on the invoice.

In addition, if your projects allow you to create time entries by selecting from a list of tasks, you can display both the task and description that the employee might have added to the record on your itemized invoices. If the task is blank, it will show the description only. You must check the Show Task option to do that.

Invoice Output Tab

Invoice Title:
Enter the title of your invoice.

Invoice Message:
Enter the invoice message and check the *Display at Top* check box to display the message on top of your invoice.

Invoice Template:
Specify the template you want to use for your invoice.

The invoice title, message and template information is saved with the generated invoice. When you open a historical invoice, it uses the title, message and template defined at the time it was created. This function only applies to invoices created in 2016 version and later.

Invoice Output:
Choice the output format of the generated invoice (that is, PDF or RTF).

Button Panel

Search :
Use this search field to locate projects quickly. The field's predictive search instantly display results as you type in this field

Active Only:
Mark this check box to search the active projects only.

Previous:
Click to display the previous project record.

Next:
Click to display the next project record.

Help:
Opens the ArchiOffice Help in the Projects section.

Action

New:
Select to create a new project.

Duplicate:
Select to duplicate an active project record.

Delete:
Select to delete a project. This is a secure privilege available only when specifically allowed in the Preferences screen.

My List:
Select to view projects assigned to you.

List
Select to view a list of all projects.

Find:
Use this option to locate projects matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

How Do I

Projects

HOW DO I CREATE INTERNAL PROJECTS?

Internal projects are used for tracking non-billable time for activities such as sales, marketing, meetings; and time used for holidays, vacation, or sick leave.

Do the following to create a project for internal activities:

You need proper privileges to complete this procedure.

1. Open a contact record or create a new one.
2. Click the **Projects** tab and select **New** from the *Action* drop-down list on the tab's button panel.
3. Select **Internal** and click **Continue**.

4. Enter a descriptive project name (for example, General Office) and edit the system-generated project number if needed.

5. Click **Continue**.

6. Select **Internal** as the project type.

7. Set the project status to **Active**.

8. On the Project Team tab, select **Assign Team** or **Assign Employee** from the *Action* drop-down list to assign employees to a project.

9. Click the **Phases/Codes** tab and add new internal phases (for example, Admin, Management, Meetings, Marketing, Sales, etc.) and associated job codes (for example, Jury Duty, Vacation, Holiday, etc.) by selecting **Main** from the *Action* drop-down lists in the Phase and Job Code panels.

10. Select the **Active** check box for each phase and job code added so they can be used for time entry.

    Remember to click Save to store your phase and job code settings.

    You can delete the default phases and job codes ArchiOffice adds when creating a project.

11. Click **Save** on the Projects button panel. Employees can now use the new phases and job codes to record time for non-billable company tasks and activities.

    You can set up separate internal projects for each department (for example, Accounting, Graphics, Marketing, etc.).

    You can add tasks, documents and events to an internal task as you would with billable or RFP projects.

HOW DO I CREATE RFP PROJECTS?

Do the following to create a project for RFP work:

You need proper privileges to complete this procedure.

1. Open a contact record or create a new one.

2. Click the **Projects** tab and select **New** from the *Action* drop-down list on the tab's button panel.

3. Select **RFP** and click **Continue**.

4. Specify the client, enter a project name and edit the system-generated project number if needed.

For RFP projects, you should add a prefix or suffix to the project number to distinguish it from billable projects (for example, R2017-0006).

5. Click **Continue**.

6. Make a selection from the *Project Type* drop-down list. The classification types are set up in Preferences.

7. Make sure the *Status* is **Active**.

8. Choose **RFP**.

9. Click **Save** on the Projects button panel.

You can set up additional information on the other project tabs (for example, General, Documents, Tasks, etc.).

HOW DO I CREATE BILLABLE PROJECTS?

Do the following to create a project for billable work:

You need proper privileges to complete this procedure.

1. Open an existing contact record or create a new one.

2. Click the **Projects** tab and select **New** from the *Action* drop-down list.

3. Select **Billable** and click **Continue**.

4. Specify the client, enter a project name and edit the system-generated project number if needed.

5. Click **Continue**.

6. Specify the *Project Type*. The classification types are set up in Preferences.

7. Make sure the *Status* is **Active**.

8. Click **Save** on the Projects button panel.

You can set up additional information on the other project tabs (for example, General, Documents, Tasks, etc.).

HOW DO I CREATE PROJECT TEMPLATES?

A lot of information must be entered when creating a project record such as team members, phases, tasks, etc. If your firm specializes in certain project types (for example, schools, churches, or car dealerships), you can expedite setting up these projects by using templates.

Do the following to create a project template:

1. Click **Projects** on the *navigation* bar.
2. Select a listed project on which the template will be based.
3. Select **Duplicate** from the *Action* drop-down list on the toolbar.
4. When prompted to confirm the new project number, add 'T' as a prefix (for example, T2017-0006), and click **OK**.
5. On the *Details* tab, edit the project name (for example, Car Dealership Template).
6. Select **Template** from the *Project Status* drop-down list. This prevents the template from displaying in any reports.
7. Delete information in the *Project Address* fields and click **Save**.
8. Click **Reassign** and select an employee (for example, Principal) as the *Billing client* and click **Save**.
9. Click the **General** tab and delete the listed project contacts so the template is not associated with any existing clients.

   Hover the mouse over a contact and click *Delete* to remove it.

10. Click **Save**.

HOW DO I CREATE PROJECTS FROM TEMPLATES?

With project templates, you can get off to a quick start on projects on which your firm frequently works (for example, restaurants).

If your firm has already created templates, do the following to create a new project from one of them:

1. Click **Projects** on the *navigation* bar.
2. Select **Find** from the *Action* drop-down list on the toolbar.

3. On the Project Search Request screen, select **Template** from the *Project Status* drop-down list.

4. Click **Search**.

5. Select the template to be used to create the new project.

6. Select **Duplicate** from the *Action* drop-down list on the toolbar.

7. Click **OK** to confirm the project number.

8. On the *Details* tab, edit the project name and change the project status to **Active**.

9. Enter a project address and click **Save**.

10. Reassign the Billing client and assign the project Originator, Principal and Leader. Click **Save**.

11. Click the **General** tab and add contacts. Click **Save**.

12. Make additional changes to fine-tune the project as needed.

HOW DO I MOVE PROJECTS TO A DIFFERENT BILLING CONTACT?

Do the following to change the contact specified as the Billing Client for a project:

1. Open the project record to be updated.

2. In the Project-Details screen, in the *Key People* section, click **Reassign**. A contact list displays.

3. Click **Assign** for the new Billing Client. That contact's name now displays in the *Billing Client* field.

The previously selected Billing Client is still associated with the project, but the bills will now go to the contact in the *Billing Client* field.

HOW DO I DUPLICATE EXISTING PROJECTS?

If you are starting a new project with information (for example, Team, Phases and Tasks) similar to an existing one in ArchiOffice, you can duplicate that project to expedite the set up for the new project.

When you create a duplicate, everything gets copied except for timecards, notes, events and documents.

Do the following to duplicate a project:

1. Click **Projects** on the *navigation* bar.
2. Select a listed project to be duplicated.
3. Select **Duplicate** from the *Action* drop-down list.
4. Confirm the new project number, make changes if needed, and click **OK**.
5. On the *Details* tab, edit the project name and click **Save**.
6. Reassign the billing client if needed and click **Save**. Make additional changes to the project as needed.

HOW DO I ADD PROJECT CONTACTS AND MILESTONES?

After creating a project, you need to add contacts that are associated with the project. In addition, it is a good idea to set milestone events to ensure that the key events are achieved on schedule to complete the project successfully.

Assign Contacts

Do the following to assign contacts:

1. Click **Projects** on the navigation bar.
2. Select a listed project to edit.
3. Click the **General** tab.
4. In the *Project Contacts* section, click **Add Contacts**. The Contact Search Request screen displays.
5. Enter the search criteria to find the contact and click **Search**.
6. In the search results list, click **Add** for the contact to assign.
7. If this person is the primary contact, select the **Default** check box.
8. Specify a role for the contact (Optional).
9. Click **Save** .

10. Repeat steps 4-9 to add additional contacts.

Add Milestones

Do the following to add milestones:

1. Click **Projects** on the navigation bar.
2. Select a listed project to edit.
3. Click the **General** tab.
4. In the *Project Milestones* section, click **Add Milestones**.
5. Do one of the following:
    - Select one of the default milestones from the *Existing Milestone* drop-down list and click **Add Milestone**.
    - Click **Add All** to assign all default milestones to the project.
    - Enter a new key event in the *Custom Milestone* field and click **Add Milestone**.
6. In the *Date* column, specify the date on which the key event is to be achieved. Click **Save**.
7. Click **Edit Milestone** to go to the *Calendar -Detail* screen and modify details for the event.
8. Repeat steps 4-7 to add additional contacts.

HOW DO I ADD AND TRACK CONSULTANTS?

There are two methods for adding consultants to a project and tracking their related fees- Reimbursable and Non-reimbursable. The following information provides details on how to use both methods. Choose the method that best suits your firm's billing methods.

As Reimbursable Expenses

This method is useful when a contract specifies that consultant service fees be passed on directly to the client. In addition, clients are aware that they will be charged separately for consulting fees. It provides the ability to bill your client for consultant fees as reimbursable expenses.

Do the following to add consultant services as a reimbursable expense:

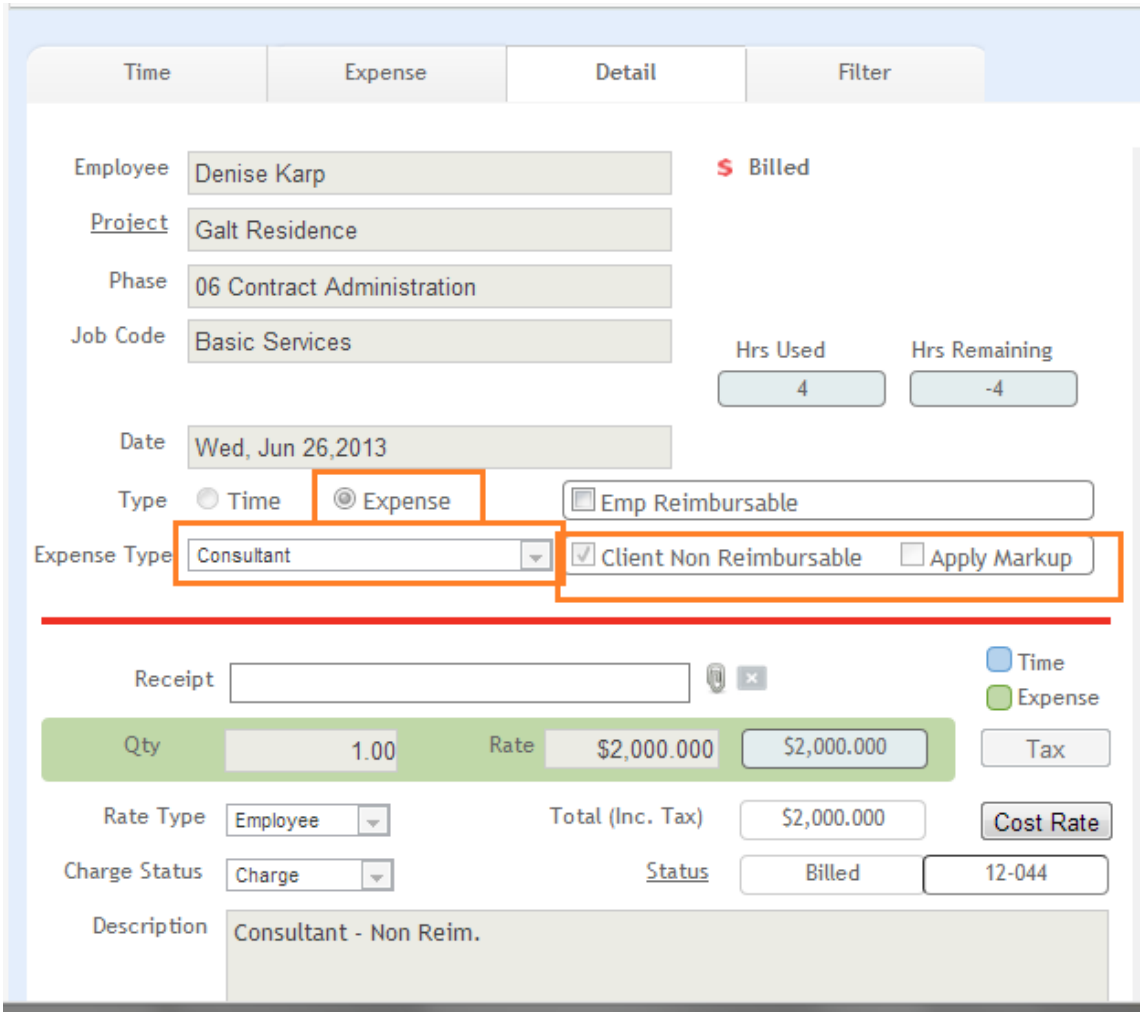
1. Select **Preferences** from the *master* drop-down list.
2. Go to Billing > Billing Codes.
3. Select **Expense** from the *Account Codes* drop-down list.
4. Click **Add** and create an expense account code for your consultants. You can create one category (for example, Consultant) or break it down into consultant types (for example, Structural Engineer, MEP, Civil Engineer, etc.). You can also

identify them by name (for example, Cagel Engineering, Michelson Engineering, and A & E Consultants).

Billing Codes

Name	Price	Cost Rate	Emp Reimb	Markup	Quantity
Airfare	$250.000	$200.000	☐	☑	1
Blueprinting	$0.000	0	☐	☐	1
Car Mileage	$0.550	0	☑	☑	1
Car Rental	$0.000	0	☐	☑	1
CD-Burning	$15.000	0	☐	☑	1
Color Print	$1.000	$0.250	☐	☑	1
Consultant	$0.000	0	☐	☐	1
Consultant: Civil	$0.000	0	☐	☐	1
Consultant: Landscape	$0.000	0	☐	☐	1
Consultant: Lighting	$0.000	0	☐	☐	1
Consultant: MEP	$0.000	0	☐	☐	1
Consultant: Structural	$0.000	0	☐	☐	1
Fax	$3.000	$0.150	☐	☑	1
FF&E	$0.000	0	☐	☐	1
Hotel	$0.000	0	☐	☑	1

5. When you receive a bill from your consultant, navigate to the *Time/Expense* module and create an expense entry for the project.
6. Choose the consultant account code created in step 4 from the *Expense Type* drop-down list. This expense entry will appear on the invoice as a reimbursable expense including the markup, if applicable.



7.

8. Clear the **Apply Markup** check box if you want to extend the consulting expense to your client without a markup.

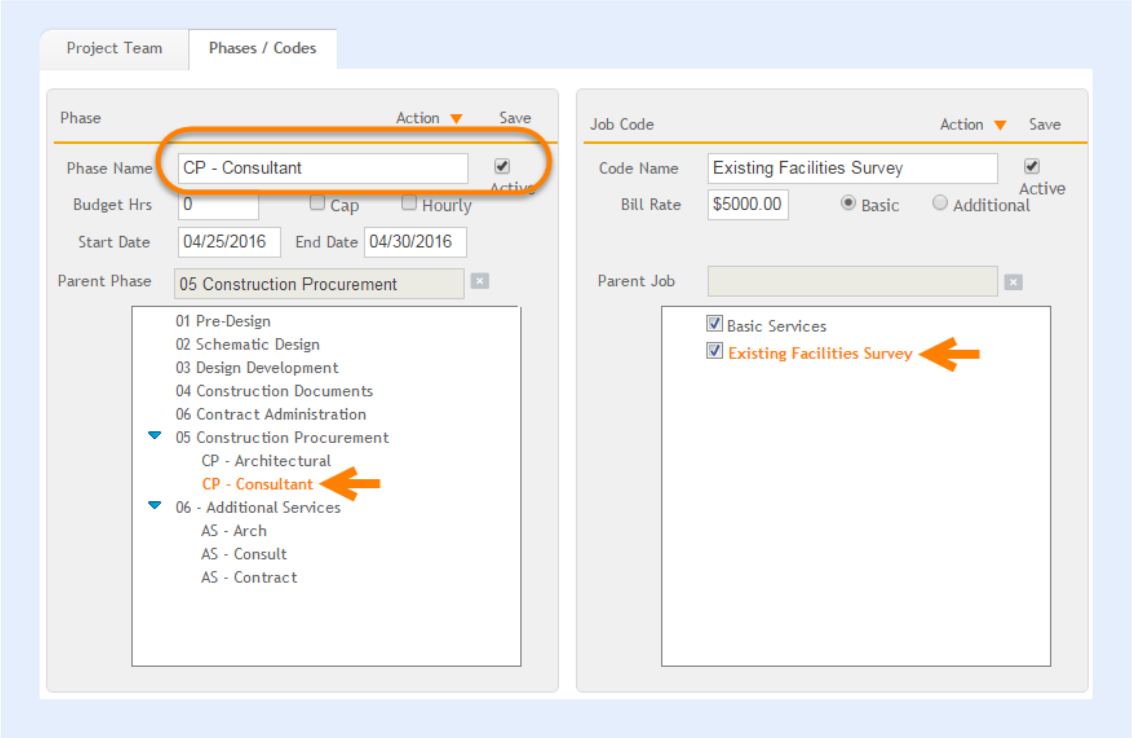
As Non-Reimbursable Expenses

This method is useful when a contract requires that consultant services are to be paid by the architect and not passed on to the client as a reimbursable expense. In this situation, the client might or might not know the specific fees for consultants as they are negotiated between the consultant and architect. This method provides the ability to bill your client a stipulated sum by phase, without specifically identifying the consultant portion of each fee. It also allows you to track the consultant fees separate from your fees.

Do the following to track consultant expenses:

1. Click **Projects** on the navigation bar.
2. Click a listed project to edit and then click the **Phases/Codes** tab.
3. Add a sub-phase to each main phase for your consultants (for example, Structural Engineering) and also an *architectural* sub-phase to track your services separately.

4. Select the **Active** check box for job codes for each sub-phase.



You can also create a job code specifically for consultants, especially if the contract has services that might be basic and others that are hourly- even though they can't be passed on to the client. Check the appropriate job codes for this phase to track consultant services separately.

5. Go to the *Projects-Billing* view, and select **Budgets** from the drop-down list.
6. Create a budget for the consultant fees accordingly. Click on the phase name to expand the sub-phase list.
7. When you receive a bill from your consultant, go to the Time/Expense -Detail screen and create an expense entry for the project.
8. Select the **Non-Reimbursable** check box. This ensures the expense entry is applied against the stipulated fee for the phase and not charged to the client as a reimbursable expense.

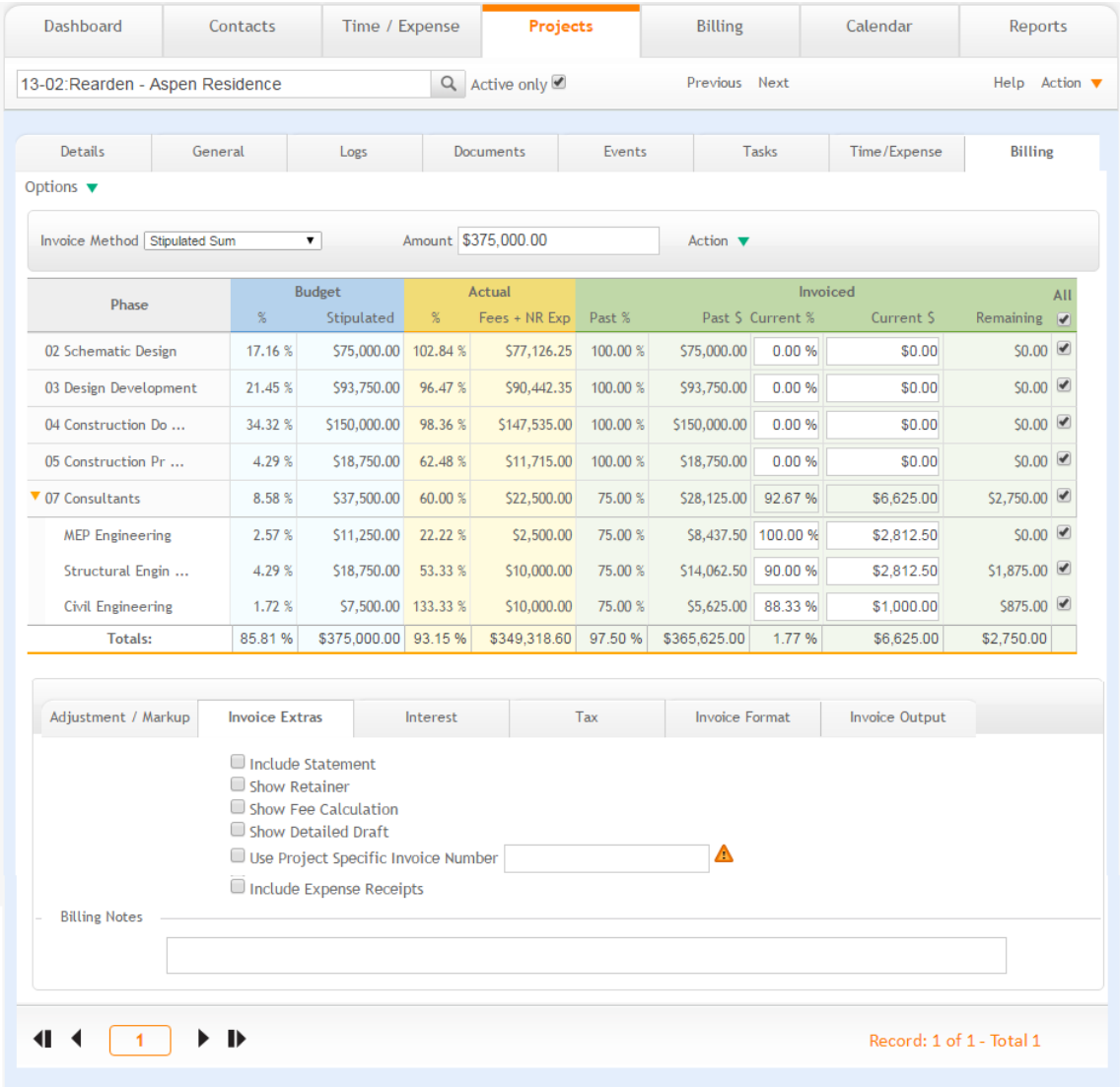
   This expense entry does not appear separately on the invoice, but is billed as a part of the stipulated fee for the phase. Therefore, your clients will not know they are being charged for consultant services separate from your fee.

9. Continuing on the *Projects -Billing* view, select **Summary** from the drop-down list. The consultant fees can be tracked separate from your fee on this screen. The *Consultant* non-reimbursable expense entry is tracked separately from your *architectural* time/fee.

   Click on the phase name to expand the sub-phase list.

10. Continuing on the *Projects-Billing View*, select **Options** from the drop-down list.

11. To bill the client, expand the phase and enter the fee amount to be invoiced and then collapse the phase.



Your client will see the fees due for the entire phase, with all the sub-phase fees rolled up into the main-phase. If you want to show the phase and sub-phases on the invoice, keep the sub-phases expanded before generating the invoice.

HOW DO I VIEW BUDGETED AND ADDITIONAL SERVICES?

Some people consider additional services as being completely separate from the determined architectural budget. They want to view their budgets with additional services subtracted from the remaining fee.

To see the basic service budgeted, actual and invoiced amounts separated from the additional services, go to the Projects > Billing screen and select **Summary** from the drop-down list to view the desired information.

In addition, you go to the Projects > General screen and select Performance from the drop-down list. The Performance screen separates basic services from additional services and shows their respective profitability.

You can also print reports that separate additional services information. In the Reports screen, select one of the following reports:

- **Projects > Profitability Accrued**: Shows basic services separated from the additional service job codes.
- **Time/Expense > Time Card Profitability Report**: Shows information broken down by Service Type (Basic vs. Additional).

To see the basic service budgets/actual/invoiced amounts separated from the Additional Services, go to the Projects-Billing-Summary screen. If you click the Summary Table button in the lower-left corner of the screen, you can view the desired information.

You can also access a number of reports from the Reports screen that present this view:

- **Reports-Projects-Profitability Accrued:** where you can see basic service phases separated from the additional service job codes.
- **Reports-Projects-Project Quick View:** where you can print out reports that contain the data seen in the Projects-General Quick View screen. It separates basic services from additional services and shows their respective profitability.
- **Reports-Time/Expense:** where you can see information broken down by Service Type (Basic vs. Additional).

HOW DO I ADD TASKS TO EXISTING PROJECTS?

You can set up default tasks in Preferences and then load them for a phase at the project level using the Action menu > Load. You can also add new tasks to existing projects. Do the following to add new tasks:

1. Open a project and click the **Tasks** tab. Select a phase in the *Phase* grid.
2. In the *Task* section, make a selection from the **Type** drop-down list.
3. Select the **Main** from the Action drop-down list to add a new task at the top level or select **Sub** from the Action drop-down.
4. Click the new task.
5. Edit the task description.
6. In the *Responsible* section, select the check boxes for the persons responsible for the task.
7. Select a planned completion date in the *Budget End* date field.
8. Enter the budgeted hours for the task.

9. The status will be set to Pending. This can be changed by clicking the status to Completed or Not Applicable.

10. Click **Done**.

The budgeted task hours in the top pane should increment by the value entered into the budgeted hours for the new task.

Phases

HOW DO I CAP FEE ON PHASES?

A cap is the maximum amount that a client can be billed on a project phase. Any additional time entries logged against this phase or job code will be billed at an extended value.

A project budget must be set up before specifying a phase cap.

Do the following to set a cap on an hourly phase:

1. Open a project record.
2. In the Projects -Billing screen, select **Budgets** from the drop-down list on the button panel.
3. Select the **Cap** check box for an hourly phase.
4. In the same row, enter the maximum amount in the *Hr Fees* column the client can be billed for the phase.
5. Select **Save Phases** from the *Action* drop-down list.

HOW DO I DISPLAY ESTIMATED TASK PROGRESS?

By default, the progress bars on the Projects -Tasks screen only move when a task has been marked completed. For a more accurate display of a phase's progress, you can set up ArchiOffice so the bars will display progress based on the estimated percentage of completion entered for each task.

Do the following to use the estimation feature:

1. Click **Projects** on the navigation bar.

2. Select a listed project to edit.

3. On the *Tasks* tab, select the **Use Estimated Completion for Progress** check box.

4. Select a phase and then click **Edit** on the grid for the related tasks.

5. In the *Task Detail View* screen, enter a percentage of the hours completed in the Estimated field.

6. Click **Done**.

7. Repeat steps **4-6** to enter estimates for additional tasks.

8. Select **Save** from the *Action* drop-down list on the *Tasks* button panel to save your changes and update the progress bars.

HOW DO I CHANGE PHASES FOR TIME ENTRY?

Occasionally you might need to change the phase selected for a time entry. For example, you notice that a phase was selected by an employee in error. Phases can be changed for un-billed and billed time.

Change Phase for Unbilled Time

Do the following to change the phase for un-billed time:

1. Click **Time/Expense** on the navigation bar.

2. Select **Find** from the *Action* drop-down list. The Time/Expense Search Request screen displays.

3. Enter the name of the employee and project associated with the time and expenses. Select a time entry status of *Complete* or *Approved* and click **Search**.

4. Select **Change Phase** from the *Update* drop-down list.

5. Select the new phase and click **Update**.

Change Phase for Billed Time

To change the phase for billed time you need to un-bill those entries, change the phase and then re-bill them.

1. Click **Time/Expense** on the navigation bar.

2. Select **Find** from the *Action* drop-down list. The Time/Expense Search Request screen displays.

3. Enter the name of the employee and project name associated with the time entries. Select a time entry status of *Billed* and click **Search**.

4. Select **Unbill** from the *Update* drop-down list.

5. Click **Yes**.

6. Select **Change Phase** from the *Update* drop-down list.

7. Select the new phase and click **Update**.

8. Select **Bill** from the *Update* drop-down list to re-bill the time entries with an existing invoice.

9. Select the invoice (checking date and invoice number) and click **Update**. Your time entries have now been assigned to a new phase and are back at the billed status.

HOW DO I MODIFY PROJECT PHASES AND JOB CODES?

When a project is created in ArchiOffice, the default phases and job codes created in preferences are automatically added to it.

Phases

To make changes to phases and job codes for an existing project, do the following:

1. Go to the Projects screen.

2. On the Details tab, click the **Phases/Codes** tab.

3. Select a phase. Its details display above the phase list.

4. Modify the phase name and hours as needed.

5. Clear the phase's active status if you do not want employees to be able to enter time for it.

6. Set phases as hourly or fixed. If you change a phase to hourly, you can go to the Budgets screen to enter the max fee.

7. If the phase is hourly, you can select the **Cap** check box to set a maximum billing fee.

8. To add a new phase or reposition a selected phase, make the appropriate selection from the *Action* drop-down list in the Phase panel (for example, Main or Sub).

9. Select **Delete** from the *Action* drop-down list to remove a selected phase from the list.

10. Click **Save** when you have finished.

    You cannot add a sub-phase to a phase that has been included on an invoice.

    When adding a sub-phase to a phase that has been used when recording time or expense entries, all job codes, budget details, tasks and time and expense entries are moved to the new sub-phase.

    When adding a sub-phase to a phase that has not been used to record a time or expense entry, if the *Use Task for Time* option on the Projects-Tasks tab has been enabled, all job codes, budget details, tasks, and time and expense entries are

moved to the new sub-phase. Otherwise, the budget and job codes will be moved to the new sub-phase and you will be given the option to move the tasks.

Job Codes

To make changes to job codes, do the following:

1. Go to the Projects screen.
2. On the Details tab, click the **Phases/Codes** tab.
3. Select a phase. The related job codes display in the adjacent panel.
4. Modify the code name and bill rate as needed.
5. Clear the code's active status if you do not want employees to be able to enter time for it.
6. Designate the code as being either a *Basic* or *Additional* service.
7. To add a new code or reposition a selected code, make the appropriate selection from the *Action* drop-down list in the Job Code panel (for example, Main or Sub).
8. Select **Delete** from the *Action* drop-down list to remove a selected job code from the list.
9. Click **Save** when you have finished.

HOW DO I SET UP HOURLY PHASES?

You can designate a phase for time and materials by making it billable on an hourly basis. All time entries entered against this phase are billed as hourly charges, even if the project is fixed fee.

Hourly fees are listed in the *Hourly Services* section of an invoice.

Do the following to set up a phase as hourly:

1. Open a project record.
2. Go to the Projects > Billing screen and select **Budgets** from the drop-down list on the button panel.
3. Select the **Hourly** check box for a listed phase.
4. In the same row, enter the budgeted rate for that phase in the *$*/Hr. column.
5. Select **Save Phases** from the *Action* drop-down list.

HOW DO I COMBINE HOURLY SERVICES WITH FIXED FEE BILLING?

If you are struggling with how to track time and material charges on fixed fee projects, you can use phases to do this.

Any phase can be designated as an hourly phase by checking the *Hourly* check box for the Phase on the Projects-Billing-Budget screen. Any time entered using this phase will be billed as Time and Materials, if you are doing Fixed Fee billing or not. You can also specify a cap and hourly fee that is not to be exceeded (any time in excess of this will be billed as *No Charge*).

Teams

HOW DO I ASSIGN PROJECT TEAM MEMBERS?

Do the following to assign team members to a project:

1. Go to the project to which you want to assign team members.

2. On the *Details* tab, click the **Project Team** tab and do one of the following:

   - **Assign members individually** by selecting **Assign Employee** from the *Action* drop-down list. In the *Role* column, specify the employee's project role.
   - **Assign an existing team**, created in Preferences, by selecting **Assign Team** from the *Action* drop-down list.

3. To change an employee's preset bill rate, edit the value.

   The change will update all time entries that have not been billed for the employee to the new rate. This action cannot be reversed. You must have permissions to view and edit rates to make changes.

4. Select the **Approve T/E** check box to give an employee authority to approve time and expense entries.

5. Clear the **Active** check box to prevent an employee from being able to enter time for the project or do anything else related to the project.

6. Click **Save** for each employee for which changes have been made.

HOW DO I DELETE PROJECT TEAM MEMBERS?

To delete a project team member:

1. Go to Projects.

2. On the *Details* tab, click the **Project Team** tab.

3. Hover the mouse over the team member to be deleted and click **Delete** ⊖.

4. Click **OK** on the confirmation window.

If a person has contributed to a project (for example, entered time sheets, documents, attended events, etc.), you cannot delete that person. You can only make them inactive. And inactive team member cannot enter time on the project or do anything else.

Charts

HOW DO I CREATE STAFF EFFICIENCY CHARTS?

To create a staff efficiency chart:

1. On the Dashboard, select **Filters** from the Realization chart's *Action* drop-down list.

If the chart is not displayed, open the Dashboard's *Action* drop-down list and then select the **Realization** check box.

2. You can filter the data used in the chart by date range, user, or department.

3. Click **OK**. The chart updates automatically.

You can also view the Realization chart on the Projects-General-Charts screen. Select Charts from the drop-down list in that view.

HOW DO I VIEW PROJECT CHARTS?

Instead of looking at raw numbers, it's often more useful to present data in chart form to get a clearer picture of a project's financial state. Charts are available in ArchiOffice for you to view a project's profitability, hours worked, generated invoices, recorded time and expense, realization, and accounts payable. You can filter chart information by date, user, and other options. The available filters vary by chart.

To view a chart, do the following:

1. Open a project record.

2. Click the **General** tab and select **Charts** from the drop-down list on the *General* tab's button panel.

3. Make a selection from the chart *Type* drop-down list.

4. To filter the data used in the chart, select **Filters** from the *Action* drop-down list.

5. For a hard copy of the chart, select **Print** from the *Action* drop-down list.

Rates

HOW DO I SET BILL RATES FOR JOB CODES?

You can specify a bill rate for a particular job code that overrides a team member's bill rate.

This is useful when a firm has set up bill rates for employees but for certain services they only want to charge a set price. For example, employee rates are $75 and $140 per hour, but the Project Manager does not want to charge those rates when these employees have meetings with the client. So, the Project Manager sets up a job code called *Meetings* and enters a bill rate of $60 per hour. Whenever anyone in the firm has a meeting with the client, they will select the *Meetings* job code.

Do the following to enter job code rates:

1. Open the project for which you want to set up the job code bill rates.

2. Click the *Phase/Job Codes* tab on the Projects > Details screen.

3. In the *Job Codes* section, select a job code and enter a bill rate.

4. Choose the **Basic** option for the service type if the job code should be charged against the contract fee. If it is to be billed in addition to the contract fee, choose the **Additional** option.

5. Click **Save**.

6. Go to the Projects > Billing > Budgets screen to view the changed bill rate for this job code.

HOW DO I SET DIFFERENT BILLING RATES FOR MULTIPLE PHASES?

If you want different rates recorded for the same employee across multiple phases (for example, set one code at $70 per hour and another at $100 per hour), do the following:

1. Open the project for which you want to set up multiple phase-billing rates.

2. In the Projects > Details screen, click the **Phases/Codes** tab.

3. In the *Job Code* section, select **Main** from the *Action* drop-down list.

4. Enter a description (for example, Basic Services- Luke $65/hr.).

5. Select the **Active** check box and click **Save**.

6. Repeat steps **3-5** to add additional rates (for example, Basic Services-Luke $75/hr.).

7. In the *Phases* section, associate each phase with the relevant job codes.

   Make sure the *Active* check box is selected for each phase.

8. Now your employee can record time against each phase and the job code with the appropriate rate. When an invoice is generated for this project, you will see different rates recorded for the same employee across multiple phases.

HOW DO I UPDATE EMPLOYEE BILL RATES?

Do the following to amend an employee's billing rates for a project and apply that change to existing time or expense in a batch process:

Update Employee Billing Rates

1. Open a project record.

2. In *Details* tab, click **Project Team** tab. This should display the team members associated with this project with their respective bill rates

3. Click the billing rate you want to edit and enter the new rate.

4. Click **Save** for that team member's record.

Batch Process Existing Time/Expense to Match New Rate

1. Click **Time/Expense** on the navigation bar.

2. Select **Find** from the *Action* drop-down list. The Time/Expense Search Request screen displays.

3. Enter the name of the employee and project name associated with the time or expense and click **Search**.

4. Select **Bill Rate** from the *Update* drop-down list.

Budgets

HOW DO I CREATE BUDGETS?

With ArchiOffice, you can effectively manage projects by setting budgets for each phase of the project. Do the following to create a project budget:

1. Click **Projects** on the navigation bar.
2. Select a listed project to edit.
3. On the Details tab, select **Open** from the *Project Status* drop-down list. Do this at the quote stage of a project, before it becomes active.
4. Click the **Phases/Codes** tab.
5. In the *Budget Hrs* field, set overall hourly budget for each phase.
6. On the Projects -Billing screen, select **Budgets** from *Action* drop-down list on the button panel
7. Set the phase fees.

On the Projects -Tasks screen, you can have an hourly budget calculated from the tasks. In this case, in phase 01 Pre-Design, the total of the individual tasks comes to 43.50 hours, well within the phase budget of 100 hours.

8. Project budgets can be established for each phase either by specifying a percentage of a total contract amount or by entering an actual $ amount allocated for each phase (click the appropriate button in Set Budget By). You can also choose to set the allocated time either by hours or $/Hr. This allows you to budget the amount of hours budgeted for each phase or the anticipated average dollar per hour. Therefore the budget can be set by 4 methods:

   Choosing the appropriate budget method will open the corresponding column to enter budget values.

   - **Setting Budget by Hours and Fees**

   a. Select the *Hours* option.

   b. Select the *Fees* option.

   c. Enter budgeted hours and fees for each phase of the project.

   d. The system will automatically calculate the $/Hr and percentage of the total project budget.

- **Setting Budget by Hours and Percentage**

a. Select the *Hours* option.

b. Select the % option.

c. Enter budgeted hours and percentage of the total project budget for eachphase of the project.

d. The system will automatically calculate the $/Hr and fees.

- **Setting Budget by Rate and Fees**

a. Select the *Rate* option.

b. Select the *Fees* option.

c. Enter $/Hr and fees for each stage of the project.

d. System works out the total hours and percentage of the total project budget.

- **Setting Budget by Rate and Percentage**

a. Select the *Rate* option.

b. Select the % option.

c. Enter percentage of total project budget and $/Hr. for each stage of the project.

d. The system will automatically calculates the hours and fees.

Please note the budget totals accumulate at the bottom of the project phases.

HOW DO I PRINT BUDGET REPORTS?

Do the following to print a budget report:

1. Click **Reports** on the navigation bar.
2. In the *Standard Reports* list, open the *Project* folder and select **Budget Hours**.
3. Click **Search** to refine the found set.
4. Enter search criteria (for example, project number, name, type, etc.).
5. Click **Search**. You will be returned to the Reports screen where the number of records in the found set is displayed.

6. Click **Run Report** to view and print the report.

Billing

HOW DO I GENERATE INVOICES?

The following steps provide instructions on how to generate invoices for project time and expenses that are ready for billing. You can generate invoices for hourly (that is, Hourly Rate or Multiple of DSE/DPE) and fixed fee contracts (Stipulated Sum, Percentage of Construction and Unit Cost). Invoices can also be created for fixed fee projects that include fees for additional time and materials provided.

We recommend that you set up a project budget before generating invoices for Fixed Fee contracts so you can get a clear picture of the financial state of a project (that is, Budget, Actual and Invoiced amounts). Budgets for Percent of Construction and Unit Cost contracts must be percentage based.

1. Click **Projects** on the navigation bar.

2. Select a listed project to edit.

3. Click the **Time/Expense** tab and select **Current** from the *Invoice Status* drop-down list to review the billable time entries.

If there are time and expense entries that are on Hold you can decide if you want to bill them now. Or you can put entries on hold to bill at a later date. Time and expense entries with an Incomplete status should be resolved or deleted.

If you do not resolve incomplete time and expenses now, you will be prompted to do so when generating an invoice.

4. Click the **Billing** tab and select *Options* from the drop-down list from the Billing button panel. The first time you create an invoice for a project, you must set up its billing options.

5. Select the invoice method (for example, Hourly, Unit Cost, etc.) and do one of the following based on your selection:

   - **Hourly Rate**: Select the **Cap** check box if the project's billing fee will be capped and enter the maximum billable amount for the overall project. Skip to *Step 7* to continue.
   - **Stipulated Sum:** Enter a value in the *Current %* or *Current $* field in the invoice grid to specify the billing amount for each phase. Whether you can enter a percentage or dollar amount is based on how the project was budgeted (that is, percentage or fee). Continue to *Step 6*.
   - **Multiple of DSE/DPE:** This invoice method is only used for projects with the United States Government. Select the **Cap** check box if the project billing fee will be capped and enter the maximum billable amount for the overall

project. Specify the multiplier rate and the type, Direct Salary Expense (DSE) or Direct Personnel Expense (DPE). Skip to *Step 7* to continue.

- **Percent of Construction:** Enter an amount in the *Construction Value* field and then enter a percentage to specify the portion of the total project value to budget for billing. Enter a percentage in the *Current %* field in the invoice grid to specify the billing amount for each phase. Continue to *Step 6*.
- **Unit Cost:** Specify the footage/meters and the rate per unit of distance to determine the billing fee amount. Enter a percentage in the *Current %* field in the invoice grid to specify the billing amount for each phase. Continue to *Step 6*.

6. Select the check box in the last column to specify which phase to include and bill on the generated invoice.

7. If you need to make add or subtract amounts from the invoice or want to apply a markup to expenses, enter the amounts on the **Adjustment/Markup** tab.

8. On the **Invoice Extras** tab, specify the additional information you want to include with the invoice (for example, statement, retainer, fee details, etc.).

9. Click the **Interest** tab and set the payment and interest terms to be applied to the invoice.

10. If you need to apply a tax method different from that set up in Preferences to the project, click the **Tax** tab and make the necessary changes. Click **Apply** when you have finished. The new Tax model will be applied to all Time/Expense -Detail screen for the project that have not yet been billed.

11. Click the **Invoice Format** tab and specify whether amounts will be summarized by Job Code, Phase or neither. You can also set up the amount of detail to be displayed for time and expense entries, and determine what value to display for the balance due.

12. Click the **Invoice Output** tab and enter a title for the invoice (for example, Invoice for services rendered). Include a message to display on the invoices and select an invoice template.

13. Choose an output option for the invoice (for example, PDF or RTF).

14. Select **Save** from the Action drop-down list on the Billing button panel.

15. Select **New** from the Action drop-down list.

16. On the Invoice cut-off date screen, specify an End date.

    A Start date is not necessary. We recommend you leave this field blank to avoid excluding billable time and expense entries on the invoice by mistake.

17. Select an Invoice date. The invoice will be due in X number of days (for example, 30), based on your payment terms, from this date.

18. The next available invoice number displays by default but you can modify this number if needed.

    You can create unique invoice numbers for your projects. When generating an invoice, on the *Invoice Cut Off Date* screen, enter a unique number (for example, "Project X-001"). Note which number is next in the customized sequence (that is, "Project X-002) so that the next time you create an invoice for that project, you can overwrite the default. Invoice numbers (either the next in sequence or the custom number you defined) do not display on invoice drafts. Numbers only display on finalized invoices.

19. Click **Continue**.

    A message displays if any incomplete time and expense entries exist. You can complete or delete them and generate the invoice again.

20. A draft of the invoice displays in the selected format (for example, PDF).

21. Do one of the following:

    - If you do not like the invoice format or see an error, select **Delete Draft** from the Action drop-down list on the Billing button panel.
    - If the invoice looks correct, print the invoice or save a copy of it and close the invoice.

22. Select **Finalize Draft** from the Action drop-down list.

HOW DO I CREATE FIXED FEE INVOICES WITH ADDITIONAL SERVICES?

If you want to bill for services provided in addition to those included in a fixed fee contract (that is, Stipulated Sum, Percent of Construction or Unit Cost), time entries can be recorded for those additional services using a designated job code and then billed to the client. To accomplish this, do the following:

1. Open a project record.

2. On the Details tab, click the **Phases/Codes** tab.

3. Create a job code (for example, Additional Services) and choose the *Additional* option.

4. Use this job code for the additional services when recording time entries for extra time and materials provided.

5. When generating an invoice, on the Projects-Billing-Options screen, the basic and additional services are listed separately on the generated invoice.

HOW DO I ADD INTEREST TO INVOICES?

Do the following to add interest to an invoice:

1. Click **Projects** on the Navigation bar.
2. Select a listed project to edit.
3. Click the **Billing** tab and select **Options** from the drop-down list.
4. Click the **Interest** tab.
5. Make sure values are entered in the Interest Term and Annual Rate fields.
6. Select **Save** from the Action drop-down list.

With these settings configured, when you create an invoice after the number of days that equals the Payment Terms + Interest Terms after a currently unpaid invoice after a period that is, it will automatically add a late line to the bottom of the invoice for the number of days it is late.

HOW DO I APPLY RETAINERS WHILE FINALIZING INVOICES?

Do the following to apply a retainer while finalizing a draft invoice:

1. Click **Projects** on the navigation bar.
2. Select a listed project to edit for which a draft invoice has been generated.
3. Click the **Billing** tab and select *Options* from the drop-down list from the Billing button panel.
4. Select **Apply Retainer and Finalize Draft** from the *Action* drop-down menu. A screen displays showing the retainer amount available to apply to the invoice.

This option will not be available if the retainer you want to apply did not exist prior to generating the invoice.

5. Enter the amount to apply. Press the **Tab** key to update the *Invoice Balance* field.
6. If the amount in the *Invoice Balance* field is okay, click **Apply**.

From the accounting perspective, when retainers are applied on an invoice, this transaction debits the AO Unearned Retainer account and credits the A/R account.

Retainers

HOW DO I ADD RETAINERS?

Do the following to add a retainer for a project:

1. Click **Billing** on the navigation bar and click the Outstanding tab. This will display all the outstanding project balances in the system.
2. Click **Payment** for the relevant client row to open the Transaction Detail screen.
3. Click the Retainer option and then enter a retainer amount.
4. Click **Apply** against the desired project in the grid. The screen will update the retainer balance displayed at the bottom.
5. Click **Done**.

HOW DO I SHOW RETAINER PAYMENTS ON INVOICES?

Do the following to show a payment from retainer when invoicing:

1. Click **Projects** on the navigation bar.
2. Select a listed project to edit.
3. Click the **Billing** tab and select **Options** from the drop-down list.
4. Click the *Invoice Extras* tab and choose the **Show Retainer** check box.
5. Click the *Invoice Format* tab and choose the **Show Project Balance** option.
6. When generating the invoice, to reflect a payment, make sure the cut-off date reflects the transaction date of applying credit. Your invoice will show the invoice amount total, payment from retainer, balance of retainer account, and the customer's due project balance.

HOW DO I CREDIT PROJECTS WITH RETAINERS?

If you want to reflect a payment from a retainer and credit the project for the amount, do the following:

1. Select **Project** from the navigation bar.
2. Select a listed project to edit.
3. Click the **Billing** tab and select **Transactions** from the drop-down list.

4. Select **New** from the *Action* drop-down list to create a new transaction.

5. Enter the date to apply the retainer and choose the **Retainer** option to make a payment from the retainer account. You are prompted to make a payment from or to the retainer account.

6. Click **From** to take money from the retainer. The entire balance of the retainer displays in the Amount to Apply field. You can enter any amount less than the full amount if wanted. ArchiOffice reduces the amount left in the retainer and allow user to apply what is entered.

   You can enter a note detailing the reason for the credit retainer.

7. Click the **Projects** button to list the projects assigned to the Billing Client.

8. Select a **Project** and click **Apply**. This completes the applying of the amount to the project with an "RT" code signifying Retainer Transaction.

9. Click **Done**. Now the funds are applied to the project.

Payments

HOW DO I REFUND CLIENTS FOR PROJECT CANCELLATIONS?

When you terminate one of your clients, you need to refund their retainer as well as return some of the fees that have already been paid. The following procedure covers how to process refunds for cancelled projects:

1. Click **Projects** on the navigation bar.
2. Click a listed project.
3. Click the **Billing** tab and select **Transactions** from the drop-down list.

   You can also access the transaction list via the Contacts -Transactions screen.

4. Click a listed transaction.
5. Click the **Refund Retainer**. This button displays only when a client has a zero (or negative) balance.
6. A confirmation message displays, select **Yes**.
7. This will take you to the AO_Payments file. Click the **Done** button at the bottom of the layout. You will now see that the Retainer balance is **$0**.
8. Now you need to apply the credit for your fees since they have already paid you. Select **New** from the *Action* drop-down list in either the *Projects-Billing - Transactions* or *Contacts -Transactions* screen.

9. You will be taken back to the AO_Payments file and the Client > Payments layout. In the *Payment Type* section, choose **Credit**. Enter in the Amount to be credited in the *Amount* field.
10. On the *Contacts-Projects* portal, below the *Amount to Apply* field, click **Apply**.
11. Click **Done**.
12. Select an account to which to allocate the credit.
13. Select the Account Code (that is, *Client Fees*) and click **OK**. A negative balance should display.
14. Go to the billing contact for this project. In the *Contacts -Billing* and *Contacts-Transactions* screen, you will see the negative balance in red at the bottom of the layout with the *Refund* button next to it. Click **Refund**.
15. You will be prompted to issue a full refund, click **Full**. This will take you back to the AO_Payments file.
16. Click **Done**.

You should perform an export to your Accounting package. When you do this, you will notice that the Retainer amount was debited to your Suspense account. Another entry will credit the Client Fees account (if that was what was used for the credit), and debit the Suspense account. You can now issue the client a check for the total amount that was debited to the Suspense account. This should zero out the Suspense account (assuming you had a zero balance to begin with).

HOW DO I HANDLE OVERPAYMENTS?

When an overpayment is made, you want to reflect a credit. This situation occurs when an invoice has been paid but with an overpayment of the invoice. It can be a few cents to several hundreds of dollars. You need to reflect this overpayment and credit the customer.

Do the following when you receive a paid amount that is greater than the amount owed:

1. Select **Projects** on the navigation bar.
2. Select a listed project to edit.
3. Click the **Billing** tab and select **Transactions** from the drop-down list.
4. Select **New** from the *Action* drop-down list to create a new transaction.
5. Date the Payment.
6. Choose the **Payment** option.

7. Enter the received payment in the *Amount* field and click **Apply** for a listed invoice. Now there will be a remaining balance in the *Amount to Apply* field.

8. Click **Projects** to list projects.

9. Enter the remaining amount and click **Apply** for a listed project. The remaining value is now applied to the project. The next invoice after this payment date will reflect the overpayment because there are funds in the project balance.

10. In the Projects > Billing > Options screen, click the **Invoice Format** tab and choose the **Show Project Balance** option. The invoice will show the previous additional payments.

HOW DO I REFUND CLIENTS?

Situations can occur when you need to refund a customer for an overpayment. A refund can only be processed for a client marked as a *Billing Client* who has a negative balance (that is, overpayment).

To refund a client, please read this Knowledge Base article.

HOW DO I APPLY CREDIT ON INVOICES?

Do the following to apply a credit for services on an invoice:

1. Select **Project** on the navigation bar.

2. Select a listed project.

3. Click the **Billing** tab and select **Transaction** from the drop-down list.

4. Select **New** from the *Action* drop-down list to create a new transaction.

5. Click **Invoices**.

6. Specify a date and choose the **Credit** option.

In the *Notes* field, you can enter descriptive detail for the credit.

7. Enter the amount of the credit to be given on a listed invoice and click **Apply**. You will be prompted to select an account to apply the credit.

8. Select **Credit** or **Client Fees** and then click **OK**.

9. Click **Done**.

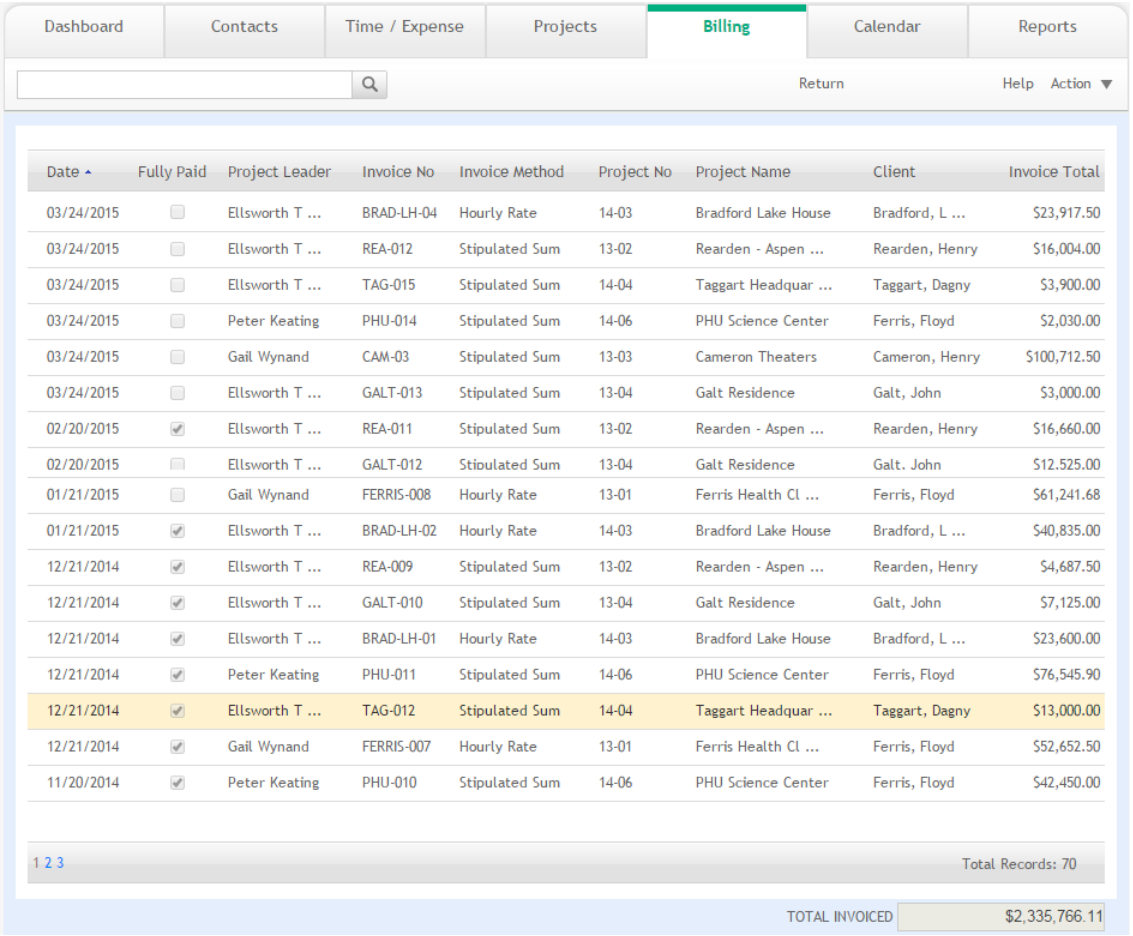
10. After you apply the credit, when generating the next invoice, choose the **Show Project Balance** option on the Invoice Format tab of the Projects-Billing-Options screen.

BILLING

Reference

BILLING LIST VIEW

The Billing list view provides a listing of all invoices in the system.



Date	Fully Paid	Project Leader	Invoice No	Invoice Method	Project No	Project Name	Client	Invoice Total
03/24/2015	☐	Ellsworth T ...	BRAD-LH-04	Hourly Rate	14-03	Bradford Lake House	Bradford, L ...	$23,917.50
03/24/2015	☐	Ellsworth T ...	REA-012	Stipulated Sum	13-02	Rearden - Aspen ...	Rearden, Henry	$16,004.00
03/24/2015	☐	Ellsworth T ...	TAG-015	Stipulated Sum	14-04	Taggart Headquar ...	Taggart, Dagny	$3,900.00
03/24/2015	☐	Peter Keating	PHU-014	Stipulated Sum	14-06	PHU Science Center	Ferris, Floyd	$2,030.00
03/24/2015	☐	Gail Wynand	CAM-03	Stipulated Sum	13-03	Cameron Theaters	Cameron, Henry	$100,712.50
03/24/2015	☐	Ellsworth T ...	GALT-013	Stipulated Sum	13-04	Galt Residence	Galt, John	$3,000.00
02/20/2015	☑	Ellsworth T ...	REA-011	Stipulated Sum	13-02	Rearden - Aspen ...	Rearden, Henry	$16,660.00
02/20/2015	☐	Ellsworth T ...	GALT-012	Stipulated Sum	13-04	Galt Residence	Galt. John	$12.525.00
01/21/2015	☐	Gail Wynand	FERRIS-008	Hourly Rate	13-01	Ferris Health Cl ...	Ferris, Floyd	$61,241.68
01/21/2015	☑	Ellsworth T ...	BRAD-LH-02	Hourly Rate	14-03	Bradford Lake House	Bradford, L ...	$40,835.00
12/21/2014	☑	Ellsworth T ...	REA-009	Stipulated Sum	13-02	Rearden - Aspen ...	Rearden, Henry	$4,687.50
12/21/2014	☑	Ellsworth T ...	GALT-010	Stipulated Sum	13-04	Galt Residence	Galt, John	$7,125.00
12/21/2014	☑	Ellsworth T ...	BRAD-LH-01	Hourly Rate	14-03	Bradford Lake House	Bradford, L ...	$23,600.00
12/21/2014	☑	Peter Keating	PHU-011	Stipulated Sum	14-06	PHU Science Center	Ferris, Floyd	$76,545.90
12/21/2014	☑	Ellsworth T ...	TAG-012	Stipulated Sum	14-04	Taggart Headquar ...	Taggart, Dagny	$13,000.00
12/21/2014	☑	Gail Wynand	FERRIS-007	Hourly Rate	13-01	Ferris Health Cl ...	Ferris, Floyd	$52,652.50
11/20/2014	☑	Peter Keating	PHU-010	Stipulated Sum	14-06	PHU Science Center	Ferris, Floyd	$42,450.00

Grid

Date:
Displays the date when the invoice was created.

Fully Paid:
This check box is selected for a fully paid invoice by a client.

Project Leader:
Displays the name of the project leader.

Invoice Number:
Invoice number associated with the selected invoice.

Invoice Method:
Displays the billing method used for the associated project (i.e., Hourly Rate, Stipulated Sum, Multiple of DSE/DPE, Percent of Construction, or Unit Cost).

Project Number:
Displays the project number associated with the invoice.

Project Name:
Displays the project name associated with the invoice.

Client:
Displays the name of the client billed.

Invoice Total:
Displays the total invoice amount based on the services, expenses, adjustments and taxes applicable to it.

View Detail:
You can click a listed invoice to view its details.

Click any column header to sort the listed invoices by that category.

Button Panel

Search :
Use this search field to locate transactions quickly. The field's predictive search instantly displays results as you type in this field.

Return:
Click to close this screen and return to the previous screen.

Help:
Opens the ArchiOffice Help in the Billing section.

Action

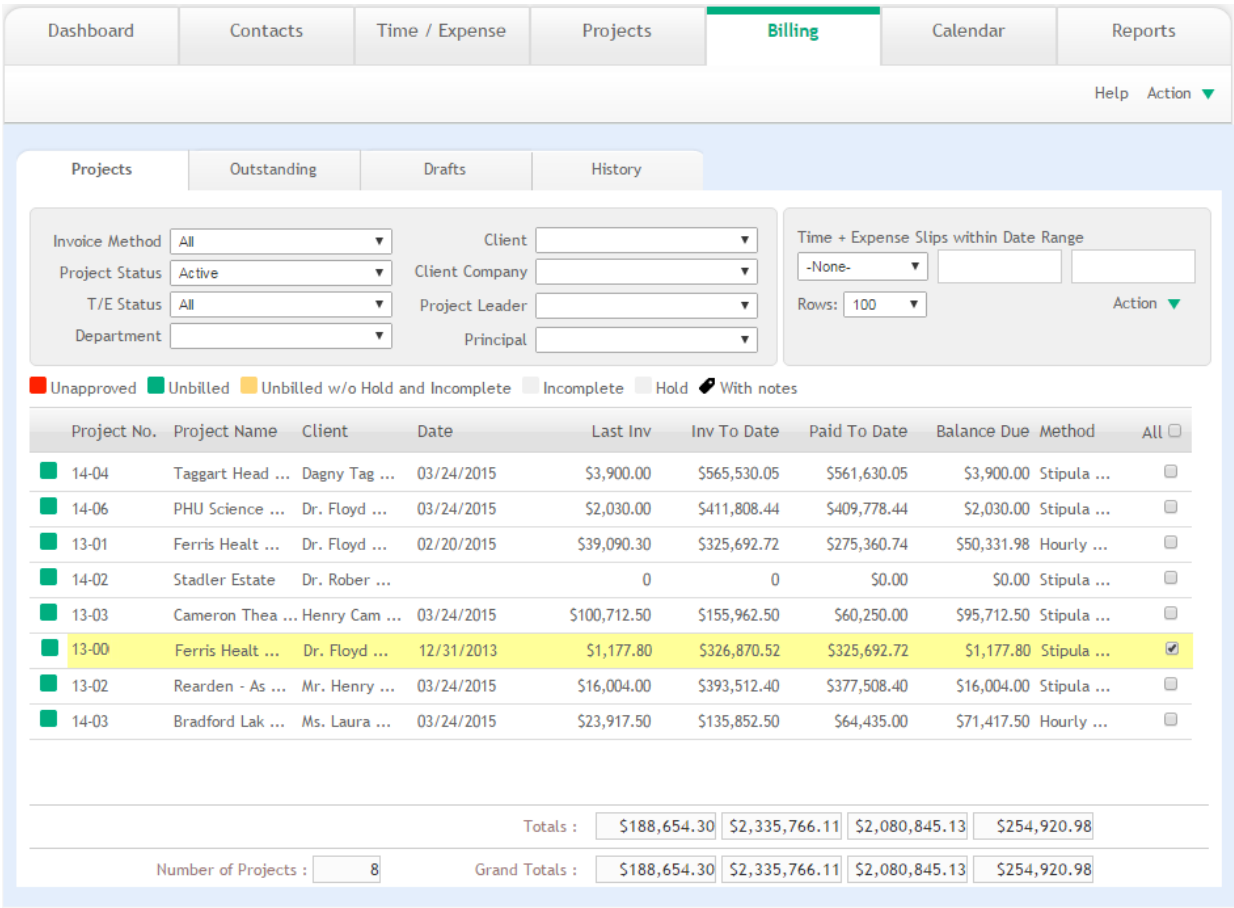
> **Find:**
> Select to find invoices matching specific criteria. The resulting Found Set displays in the list view.
>
> **Re-Find:**
> Select to return to the last Find criteria so you can modify the requests before executing the search.

Find All:
Choose this option to locate all invoices in the system.

Print:
Select this option to print a report of records displayed in the list view.

BILLING-PROJECTS

This screen displays all projects with billable time and expenses. You can select projects and generate invoices. You cannot create invoices for internal projects, as they are non-billable, nor for RFPs.



Filters

Invoice Method:
Make a selection from this drop-down list to display projects that use a specific invoice method (for example, Hourly or Stipulated Sum). All invoice methods used by your company will display in the list.

Project Status:
Choose one of these options from the drop-down list to display projects with *Active*, *Inactive*, *Cancelled* or *Completed* status.

T/E Status:
The project list can be filtered by the time and expense entry status. The list can be filtered to display projects with *Unbilled time and expenses*, *Unbilled without Hold and Incomplete* time and expenses (time and expenses not yet billed and which are not on hold or incomplete), *Incomplete time and expenses*, time and expenses on *Hold*, or *Unapproved time and expenses* (time and expenses not yet approved nor billed), With notes (projects with billing notes). Choose *All* to display all projects regardless of the time and expense entry status.

Department:
Make a selection from this drop-down to display projects associated with the selected departments.

Client:
Make a selection from this drop-down list to display projects linked with a specific client.

Client Company:
Make a selection from the drop-down list to display projects belonging to the selected client's company.

Project Leader:
Make a selection from this drop-down list to display projects linked with a specific project leader.

Principal:
Make a selection from this drop-down list to display projects linked with a specific principal.

Time + Expense Slips within Date Range:
Use these fields to specify what time and expense entries will be included on the generated invoice. Enter the dates or select a date range from the drop-down for the period you want to view the entries.

These date fields are not filters for the project list.

Rows:
Select the number of rows you want to see on the grid. The options range from 15 to 500. ArchiOffice memorizes the number of rows selected by you and displays the same next time you log in.

Action

Project List
Select this option to display the listed projects in the Projects List View.

Generate Invoice:
Select this option to create new invoices for selected projects. ArchiOffice remembers the invoice date range and last invoice date of every project. So you do not have to enter the date each time you create an invoice or draft invoice.

Grid

This list displays projects with billable time and expenses. The list can be filtered using various criteria to create a subset with which you want to work. Click any of the grid's column headers to sort the listed information. You can click a listed project on the grid to drill down and view project or client details.

The grid displays an icon for those projects having billing notes. You can hover your mouse pointer on this icon to check the detailed description.

Rows highlighted in yellow indicate projects with draft invoices.

Project No.:
The number of the project or job associated with the invoice.

Project Name:
The name of the project associated with the invoice.

Client:
Displays the name of the billing client associated with the project being invoiced.

Date:
Date when the last invoice was created. It is applicable to those project records that have been billed before.

Last Invoice Amount:
Displays the amount billed on the last invoice.

Invoice to Date:
This displays the total invoice amount based on the services, expenses, adjustments and taxes applicable to it.

Paid to Date:
Displays the total amount paid toward the invoice.

Balance Due:
This displays the balance amount that the client owes on the invoice.

Method:
Displays the billing method used for the associated project (i.e., Hourly Rate, Stipulated Sum, Multiple of DSE/DPE, Percent of Construction, or Unit Cost).

All:
Select the check box for a project record whose invoice you want to generate. Else, click the All check box at the top to select all projects.

Number of Projects:
This field displays the total number of projects displayed in the list.

Totals:
Displays the totals for the *Last Invoice Amount*, *Total Invoiced to Date*, *Total Paid to Date*, and *Balance Due* columns for items on the current page.

Grand Totals:
Displays the overall totals for the *Last Invoice Amount*, *Total Invoiced to Date*, *Total Paid to Date*, and *Balance Due* columns.

Button Panel

Help:
Opens the ArchiOffice Help in the Billing section.

Action

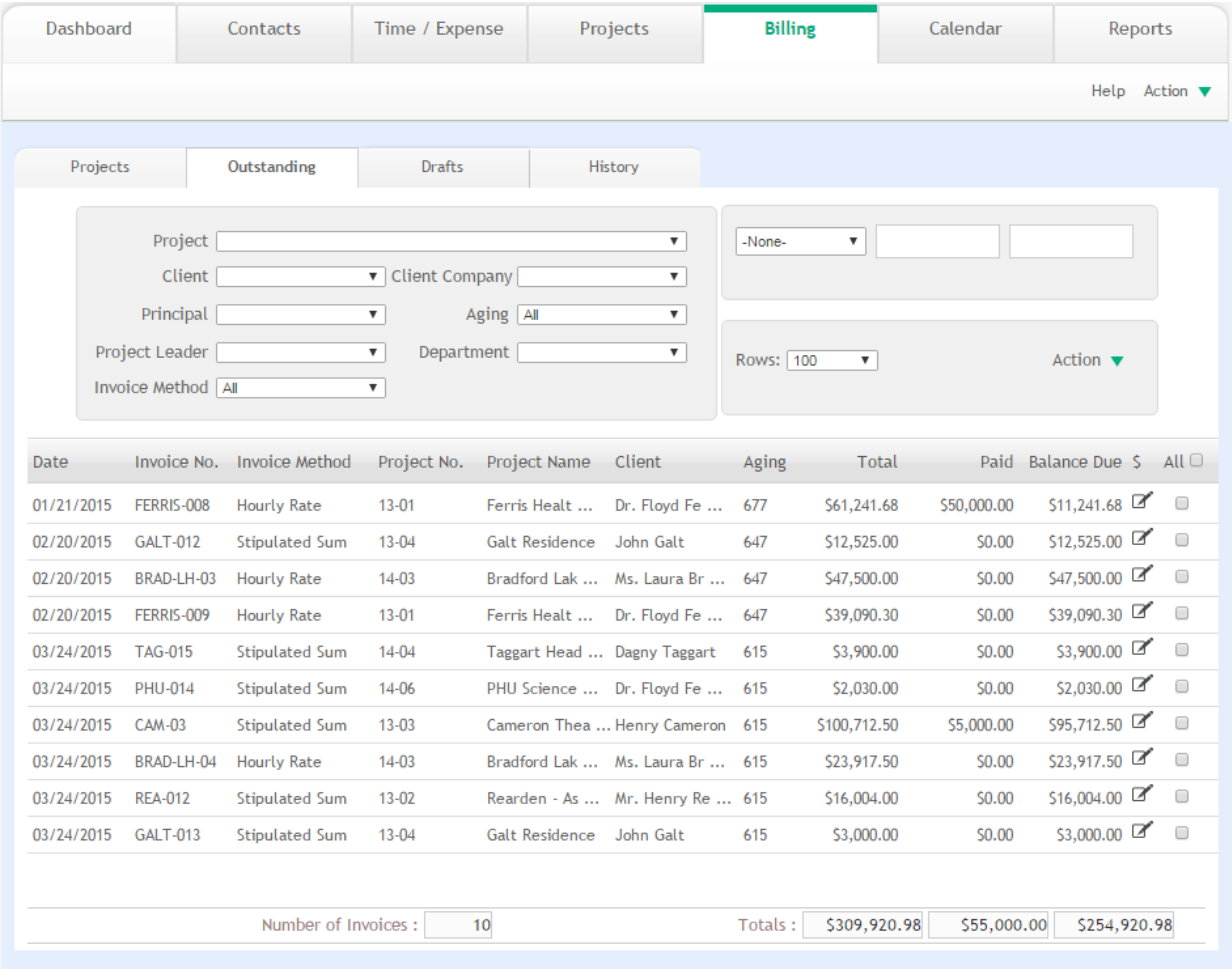
Find:
Select to locate Invoices matching specific criteria. The resulting Found Set displays in a List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

List:
Select to see all the Invoices for the Projects in the Billing List View.

BILLING-OUTSTANDING

This screen displays all invoices in the system for projects that still have a balance due (outstanding invoices).



Filters

Use the portal filters to narrow the list of outstanding invoices. Any item in the portal can be retrieved by just clicking on it.

Project:
Make a selection from the drop-down list to display invoices of the desired projects.

Client:
Make a selection from this drop-down list to display invoices linked with the specified clients.

Client Company:
Make a selection from the drop-down list to display invoices of the selected client's company.

Principal:
Make a selection from this drop-down list to display invoices linked with the specified principals.

Aging:
Make a selection from this drop-down to display outstanding invoices based on their aging period: 0-30, 31-60, 61-90, >90. Aging is based on the invoice date.

Project Leader:
Make a selection from this drop-down list to display outstanding invoices of the projects linked with the selected project leaders.

Department:
Make a selection from this drop-down to display outstanding invoices of this department associated with the project.

Invoice Method:
Displays the billing method used for the associated project (i.e., Hourly Rate, Stipulated Sum, Multiple of DSE/DPE, Percent of Construction, or Unit Cost). It can be used to filter invoices based on the desired method.

Date:
Enter the dates or select a date range from the drop-down for the period you want to view the outstanding invoices.

Rows:
Select the number of rows you want to see on the grid. The options range from 15 to 500. ArchiOffice memorizes the number of rows selected by you and displays the same next time you log in.

Action

> **List:**
> Select this option to see all the invoices for all the projects in the Billing list view.
>
> **Email Selected Invoice:**
> Click to email the outstanding invoices selected on the grid to the clients. It opens the Email screen.
>
> **Print:**
> Click this option to print the selected invoices from the grid.

Grid

Date:
Date when the invoice was created.

Invoice Number:
Invoice number associated with the selected invoice.

Invoice Method:
Displays the billing method used for the associated project (i.e., Hourly Rate, Stipulated Sum, Multiple of DSE/DPE, Percent of Construction, or Unit Cost).

Project No.:
The number of the project or job associated with the invoice.

Project Name:
The name of the project associated with the invoice.

Client:
Displays the name of the billing client associated with the project.

Aging:
Displays the aging of the invoice in days.

Total:
The total amount invoiced.

Paid:
Displays the total amount paid toward the invoice.

Balance Due:
This displays the balance amount that the client owes for the invoice.

All:
Mark or unmark this check box to select or deselect all the listed invoices.

View Invoice:
Click a listed invoice to view it.

Click any column header to sort the list by information in that column.

Enter Payment :
An authorized user can click to enter a payment for each invoice. The Transaction Detail screen opens where you can enter payment details.

Number of Invoices:
This field displays the number of invoices listed in the grid.

Totals:
The values show the total amounts invoiced, paid, and balance due.

Button Panel

Help:
Opens the ArchiOffice Help in the Billing section.

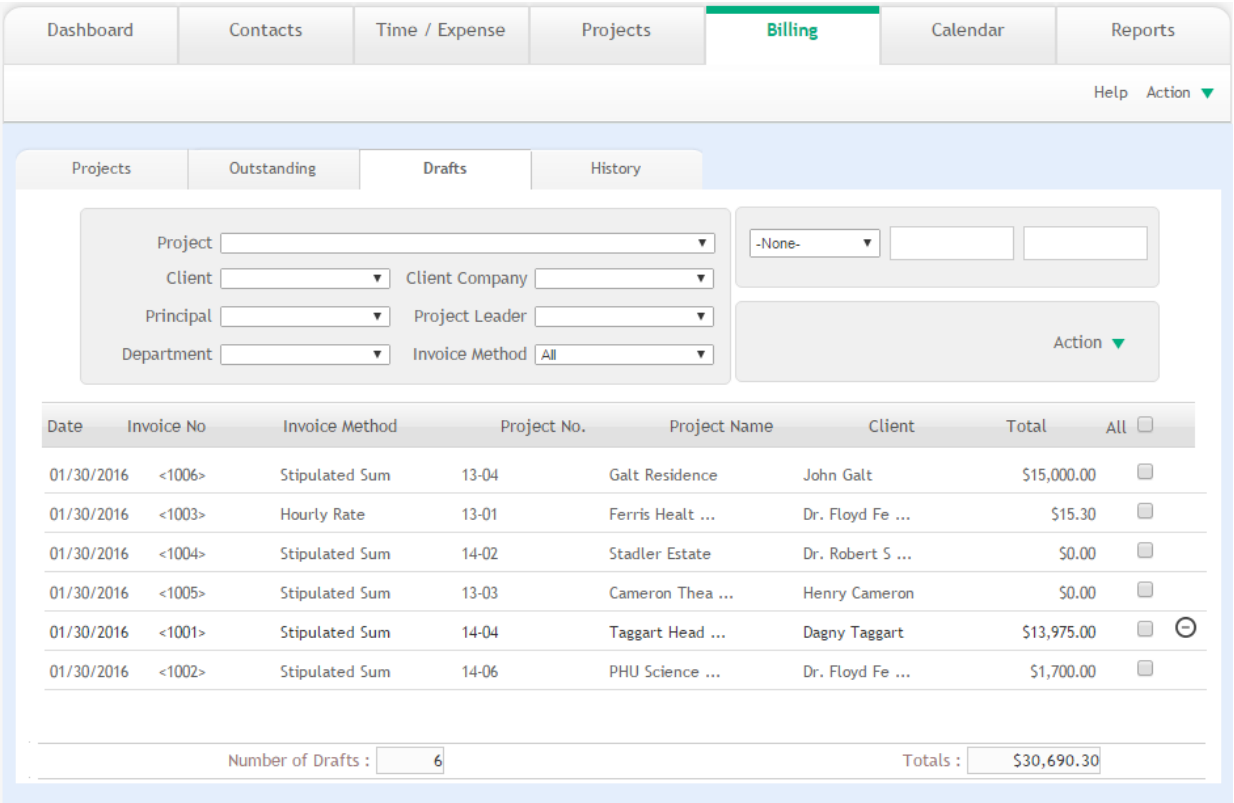
Action

> **List:**
> Select this option to see all the invoices for all the projects in the Billing list view.
>
> **Find:**
> Choose this option to locate invoices matching specific criteria. The resulting Found Set displays in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

BILLING-DRAFTS

This screen displays all draft invoices in the system. You can finalize invoices listed in the drafts list using the Action drop-down. All the draft invoices have a *Draft* watermark displayed on them.



Filters

You can filter the list of draft invoices by project, client, principal, invoice method and date.

Project:
Make a selection from the drop-down list to display the draft invoices of the desired projects.

Client:
Make a selection from this drop-down list to display the draft invoices of the desired clients.

Client Company:
Make a selection from the drop-down list to display the draft invoices of the desired client's company.

Principal:
Make a selection from this drop-down list to display the draft invoices of the desired principals.

Project Leader:
Make a selection from this drop-down list to display projects linked with the specific project leader. The list contains projects that have draft invoices associated with them.

Department:
Make a selection from this drop-down to display the draft invoices of the desired departments.

Invoice Method:
Make a selection from this drop-down list to display the draft invoices of the desired billing method.

Date:
Enter the dates or select a date range from the drop-down for the period you want to view the draft invoices.

Grid

Date:
Date when the invoice was created.

Invoice Number:
Invoice number associated with the selected draft invoice.

Creating a draft invoice or deleting it does not increment your next invoice number until that invoice is finalized. When draft invoices are finalized, ArchiOffice looks at the invoice numbers of all existing invoices to determine the next highest number and sets the default in Preferences to that number. This helps in preventing gaps in the numbering sequence.

Invoice Method:
Displays the billing method used for the associated project (i.e., Hourly Rate, Stipulated Sum, Multiple of DSE/DPE, Percent of Construction, or Unit Cost).

Project Number:
The number of the project or job associated with the invoice.

Project Name:
The name of the project associated with the invoice.

Client:
Displays the name of the client billed for the project.

Total:
The values show the total amounts invoiced, paid, and due.

All:
Select the check box for a project record whose invoice you want to generate. Else, click the top All check box to select all projects for invoicing.

Action

List
Select to view a list of invoice drafts.

Delete Selected:
Click to delete all selected draft invoices.

Finalize:
Click to finalize all selected invoices.

Print:
Click to print selected invoice drafts.

Finalize and Print:
Click to finalize the draft invoice, assign invoice number to it and print it.

Email Selected Draft Invoice:
Click to email the draft invoices selected on the grid to the project leader, principal or both. When you select an option, it opens the Email screen.

⚠ The Email option for invoices is available in the ArchiOffice Pro and Enterprise editions only.

Select/Deselect ☒:
Select ☒ to designate listed draft invoices as ready to be finalized.

Button Panel

Help:
Opens the ArchiOffice Help in the Billing section.

Action:

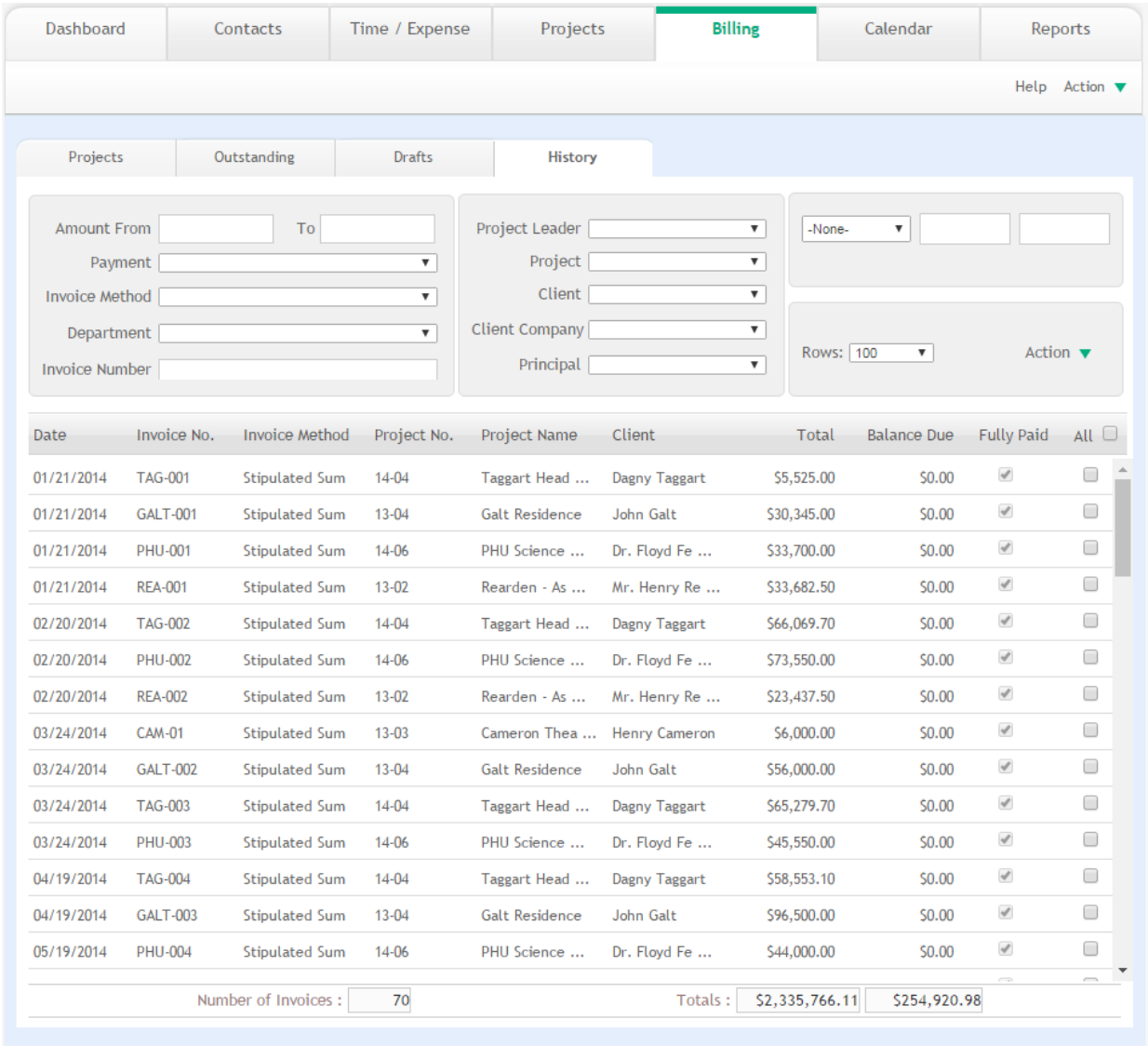
Find:
Use this option to locate invoices matching specific criteria. The resulting Found Set displays in a List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

List:
Select to view all the invoices in the Billing List View.

BILLING-HISTORY

This screen displays all finalized invoices in the system. It shows the total amount billed and the total amount outstanding.



Filters

Use the available portal filters to specify the invoices to be displayed.

Amount From-To:
Limits the invoice records displayed in the grid to those that fall within the range specified for the invoice amount.

Payment:
Selecting Closed from the drop-down list displays invoices, which are fully paid; on selecting Open, the grid displays all those invoices that are not yet paid (outstanding).

Invoice Method:
Displays the invoices based on the billing method used for the associated project (i.e., Hourly Rate, Stipulated Sum, Multiple of DSE/DPE, Percent of Construction, or Unit Cost).

Department:
Make a selection from this drop-down filter list to display the invoices of the selected departments.

Invoice No.:
Displays the invoices in the grid based on the invoice number.

Project Leader:
Make a selection from this drop-down list to display project invoices linked with the selected project leaders.

Project:
Make a selection from the drop-down list to display invoices of the desired projects.

Client:
Make a selection from this drop-down list to display invoices linked with the desired clients.

Client Company:
Make a selection from the drop-down filter list to display the invoices of the selected client company.

Principal:
Make a selection from this drop-down list to display invoices linked with the specific principals.

Date:
Enter the dates or select a date range from the drop-down for the period you want to view the draft invoices.

Rows:
Select the number of rows you want to see on the grid. The options range from 15 to 500. ArchiOffice memorizes the number of rows selected by you and displays the same next time you log in.

Action:

List:
Select to see all the invoices in the Billing list view.

Email Selected Invoice:
Click to email the invoices selected on the grid. It opens the Email screen.

The Email option for invoices is available in the ArchiOffice Pro and Enterprise editions only.

Print:
Click this option to print the selected invoice. You also have the ability to select multiple invoices and then print them in a batch mode.

Grid

Date:
Date when the invoice was created.

Invoice No.:
Invoice number associated with the selected invoice.

Invoice Method:
Displays the billing method used for the associated project (i.e., Hourly Rate, Stipulated Sum, Multiple of DSE/DPE, Percent of Construction, or Unit Cost).

Project No.:
The number of the project or job associated with the invoice.

Project Name:
The name of the project associated with the invoice.

Client:
Displays the name of the billing client associated with the project being invoiced.

Total:
The total amount invoiced.

Balance Due:
This displays the balance amount that the client owes for the invoice.

Fully Paid:
This read-only check box, when selected, indicates a fully paid invoice.

All:
You can check the boxes against one invoice, several invoices or all invoices to print them individually or in a batch mode.

View Invoice:
Click an invoice listed on the History grid to display it.

Click any column header to sort the list by that column.

Number of Invoices:
Shows the total number of finalized invoices.

Totals:
These values show the total amount invoiced and total amount due.

Button Panel

Help:
Opens the ArchiOffice Help in the Billing section.

Action:

Find:
Use this option to locate invoices matching specific criteria. The resulting Found Set displays in a List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

List:
Select to view all the invoices in the Billing List View.

How Do I

HOW DO I FINALIZE DRAFT INVOICES?

Do the following to finalize a batch of draft invoices:

1. Click **Billing** on the navigation bar.
2. Click the **Drafts** tab.
3. Apply filters as needed to narrow the list.
4. Select the check boxes for the invoices to be finalized. Click the **All** column header to flag all listed invoice drafts.
5. Select **Finalize** from the *Action* drop-down list.

HOW DO I BATCH GENERATE INVOICES?

Instead of going into each individual project to generate an invoice, you can generate a batch of invoices for projects with unbilled time or expense from a single screen.

Do the following to generate a batch of invoices:

1. Click **Billing** on the navigation bar.
2. On the *Projects* tab, choose **Project with unbilled T+E** to display only projects that are ready for billing. You can apply other filters as needed (for example, Client, Principal, etc.).
3. Enter a cut-off date in the *To* field.

We recommend that you leave the *From* field blank to avoid excluding billable time or expense on the invoice by mistake.

4. Select the check boxes for the projects to be invoiced. Click the **All** column header to flag all listed projects for invoicing.

5. Select **Generate Invoice** from the *Action* drop-down list.

6. Select an **Invoice** date. The invoice will be due in X number of days (for example, 30), based on the project's payment terms, from this date.

7. Click **OK**.

HOW DO I INCLUDE MESSAGES ON INVOICES?

In the Preferences-Billing-Labels screen, you have the option to configure auxiliary invoice messages. You can enter a message to display at the bottom of an invoice. This message is typically used for the '*Please make payments to...*' message. This field is intended for short auxiliary messages and is limited to 100 characters in length.

Do the following to create a default message for your invoices:

1. Select Preferences from the *master* drop-down list.
2. Open the *Billing* folder and click **Labels**.
3. Select **Invoice Header** from the *Category* drop-down list.
4. Enter your message in the Label column for the *Invoice Message* field.
5. Click **Save**.

If you enter more text than the maximum limit, the message will not display on the invoice at all. If you require a longer message, use the Invoice Message field on the Projects-Billing-Options screen. This field has no size limit and can accommodate longer messages.

HOW DO I SET UP CUSTOM INVOICE TERMS?

ArchiOffice comes with a set of default payment terms for you to use for invoicing, but you are not limited to these. The following information shows how you can create your own payment terms to suit your firm's specific needs.

Create Your Own Terms

Do the following to set your own invoice terms:

1. Select Preferences from the *master* drop-down list.
2. Open the **Contact** folder and click Defaults.
3. Select **Terms** from the Default type drop-down list.
4. Enter a payment term in the last row and click **Save**.

Apply Terms to an Invoice

To apply your new term to an invoice:

1. Open a project and go to *Projects* > *Billing*.
2. Select Options from the drop-down list on the Billing button panel.
3. Click the **Interest** tab at the bottom of the page and select the new payment term you added in *Preferences* to apply it to the invoice.

Set the Defaults

If you want all future projects to have the new term you set up when generating invoices, do the following:

1. Select Preferences from the *master* drop-down list.
2. Open the *Billing* folder and click Defaults.
3. Select the new term from the *Payment Terms* drop-down list. This change only applies to future projects added to ArchiOffice. It will not update your existing projects.
4. Click **Save**.

HOW DO I USE RETAINERS FOR REIMBURSABLE EXPENSES?

Do you have a contract that provides a retainer for all reimbursable expenses? Here is how to handle this situation:

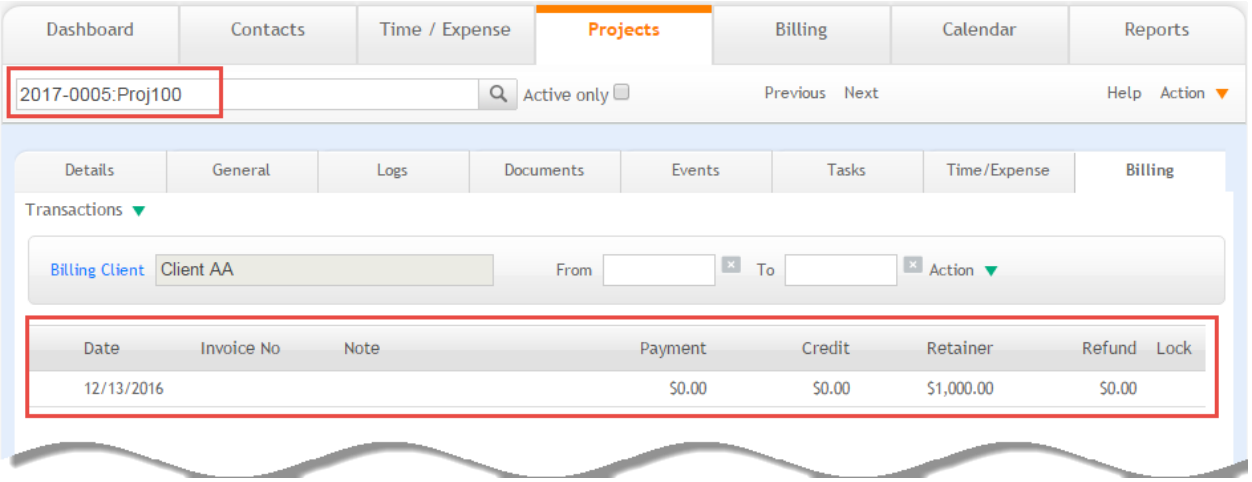
1. Select Preferences from the *master* drop-down list.
2. Open the *Billing* folder and click Billing Codes.
3. Select **Expense** from the drop-down list
4. Create a reimbursable retainer account. In the last row of the accounts list, enter the account's name and details and click **Save**.
5. The client must be notified that a retainer must be sent, so you must create an invoice specifying what to pay and where to send the money.
6. Create an expense entry using Reimbursable Retainer as the expense type (make sure the date is within the billing period). For example, you could create a single expense slip for the amount of $10,000.
7. Create a draft invoice, but do not finalize it. Send it to the client. This is a payment notification. It is not to be recorded on the client's account.
8. Delete the expense entry and draft invoice. This expense entry and invoice were only created to notify the client to send payment. You cannot keep the invoice in ArchiOffice because you will put the money in the retainer account. When the check comes in, apply it to the Retainer account.
9. Create time and expense entries during the billing period. Before finalizing the next invoice, preview the draft first and see what the value of the reimbursable expenses is.
10. Create a transaction that takes funds from the retainer account to match the amount of the reimbursable expenses. You might have a negative project balance; that will change as soon as you finalize the invoice.

11. Create the second invoice. To show the retainer balance, go to the Projects > Billing > Options screen, click the **Invoice Extras** tab and select the **Show Retainer** check box.

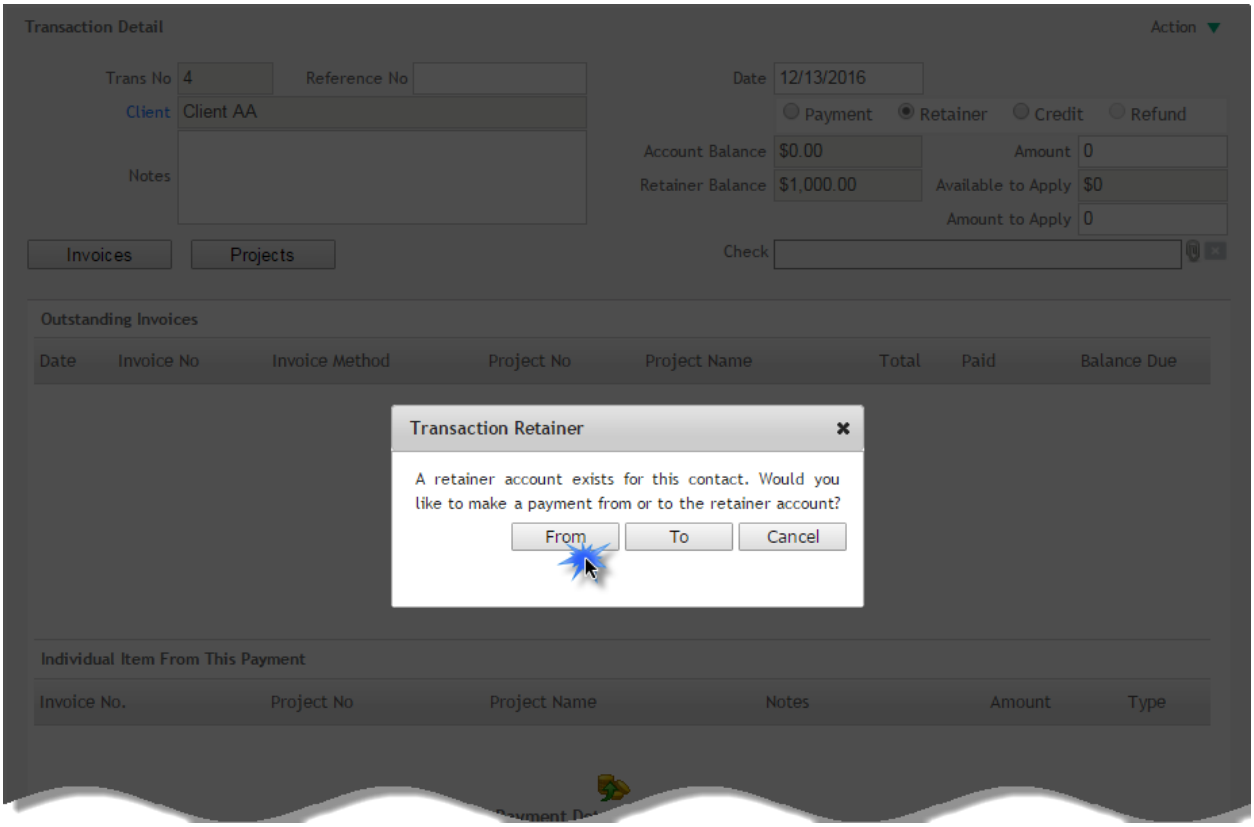
HOW DO I TRANSFER RETAINERS BETWEEN PROJECTS?

You can apply retainer payments directly to invoices as well as to projects. In addition, you can move retainer balances between projects owned by the same client. To do this:

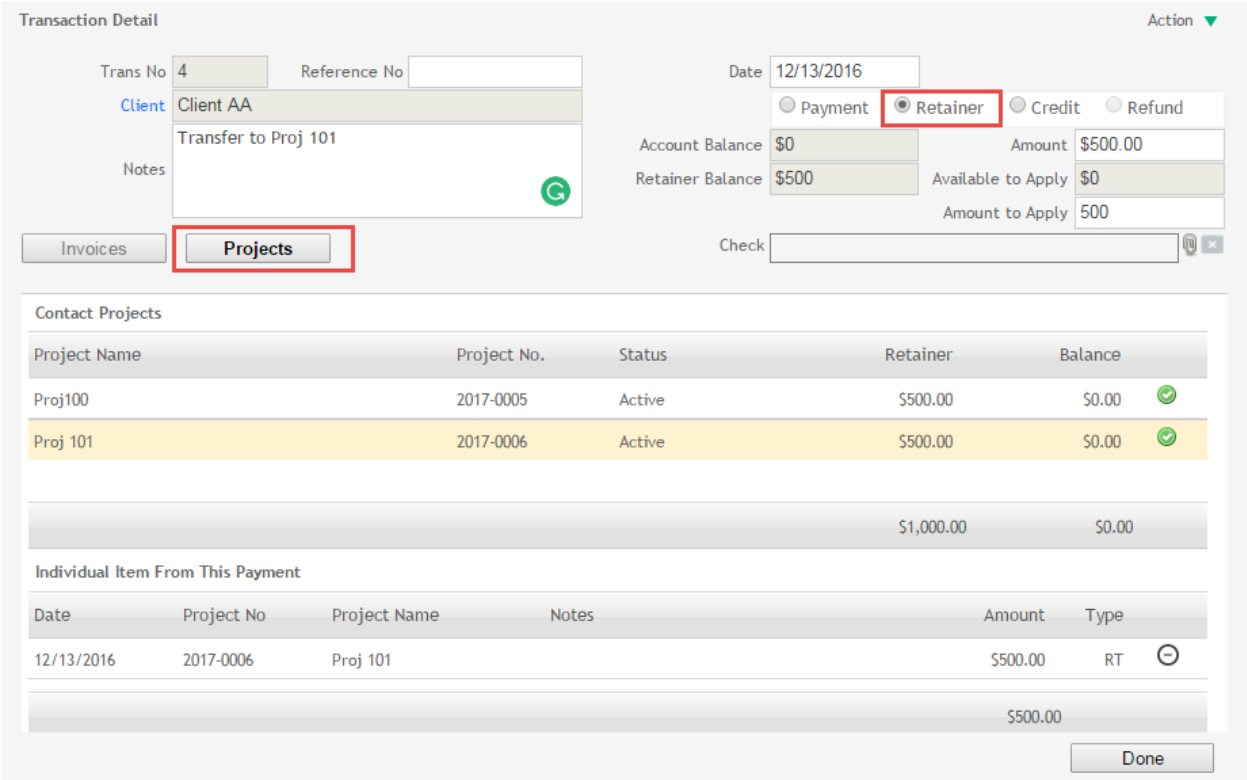
1. Create a retainer transaction for a project, say Proj 100, assigned to a client, Client AA. The same client has another project, say Proj 101.



2. On the Projects > Billing > Transactions screen, start the retainer transfer by clicking New under the Action drop-down.
3. Click the Retainer option. You are informed that a retainer exists for this client.
4. Click From on the dialog box to make a payment from the retainer account.



5. Enter the Retainer Amount to be transferred and then click the Projects button. Select the project in the grid receiving the retainer.



The first project, Proj 100, now has $500 less in retainer balance. The second project, Proj 101, has a retainer balance of the transferred amount $500.

HOW DO I APPLY PAYMENTS TO INVOICES?

Use the following steps to apply payments to invoices.

Process a Single Payment

1. Click **Projects** on the navigation bar.
2. Select a listed project to edit.
3. Click the **Billing** tab and select *Transactions* from the drop-down list from the Billing button panel.
4. Select **New** from the *Action* drop-down list of the Billing button panel.
5. Click **Invoices**.
6. Choose **Payment** as the transaction type.
7. Enter the payment received in the *Amount* field and press Tab. The amount will automatically populate the *Amount to Apply* field. If you do not want to apply the

entire amount to a single invoice, enter the amount to apply to a listed invoice in the *Amount to Apply* field.

8. In the list of *Outstanding Invoices*, click **Apply** for the invoice for which the payment is being processed. The applied payment displays in the lower part of the Transaction Detail screen.

9. Click **Done**.

Process a Batch of Payments

Instead of going into each individual project to apply a payment, if you have a stack of checks, you can process them using a single screen.

Do the following to process a batch of payments:

1. Click **Billing** on the navigation bar.

2. Click the **Outstanding** tab to display a list of invoices that are due.

3. Click **Payment** to access the Transaction Detail screen for each invoice receiving a payment.

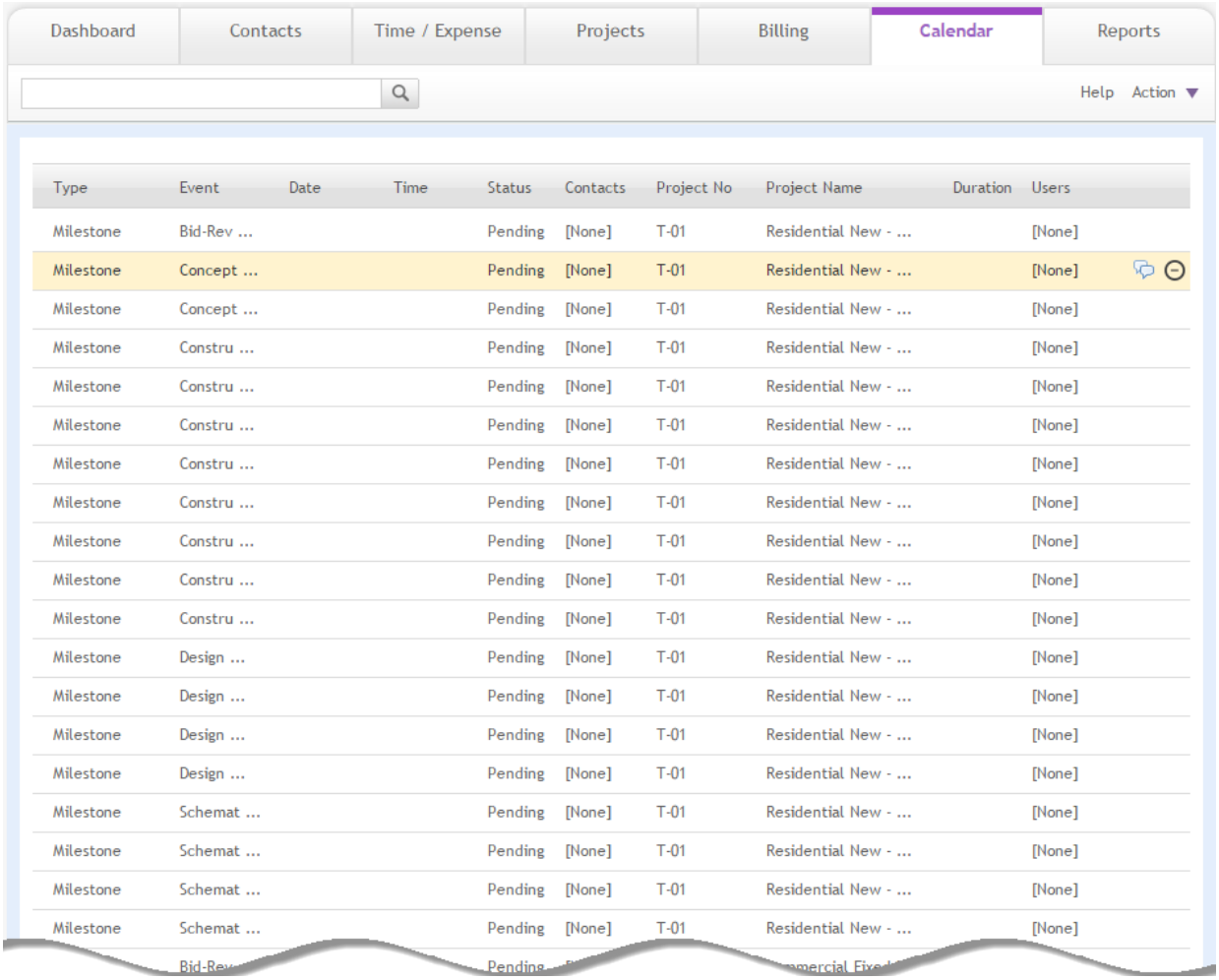
4. Follow steps 5-9 in the proceeding instructions for applying a payment.

CALENDAR

Reference

CALENDAR LIST VIEW

This view provides a listing of all calendar items in the system (that is, appointments, to-do items and milestones).



Type	Event	Date	Time	Status	Contacts	Project No	Project Name	Duration	Users
Milestone	Bid-Rev ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Concept ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Concept ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Constru ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Constru ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Constru ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Constru ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Constru ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Constru ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Constru ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Constru ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Design ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Design ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Design ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Design ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Schemat ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Schemat ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Schemat ...			Pending	[None]	T-01	Residential New - ...		[None]
Milestone	Schemat ...			Pending	[None]	T-01	Residential New - ...		[None]

Grid

Type:
Displays the type of event scheduled (i.e. To-Do, Milestone or Appointment).

Event:
Displays the event name.

Date:
Displays the date of the scheduled item.

Time:
Displays the start time of the event.

Status:
The status of the event, such as Pending, Completed, etc.

Contacts:
Displays contacts attending the event.

Project No.:
Displays the project number for which the event is scheduled.

Project Name:
Displays the name of the project for which the event is scheduled.

Duration:
Displays the duration of the scheduled event.

Users:
Displays the contacts attending the event.

Duplicate this Event :
Click on the grid to duplicate the event. You can view it on hovering over the grid row.

View Event:
Click the grid row to view or edit a selected event's details.

Schedule Conflict :
An exclamation mark in the first column indicates that an attendee assigned to an event has another scheduled event that conflicts with it.

Delete Event :
Click to delete the selected event.

Button Panel

Search :
Use this search field to locate events quickly. The field's predictive search instantly display results as you type in it.

Help:
Opens the ArchiOffice Help in the Calendar section.

Action

New:
Select to create a new event.

Calendar View:
Select this option to go to the Calendar View.

My List:
Select to view a list of events assigned to you.

List:
Select to view a list of all events.

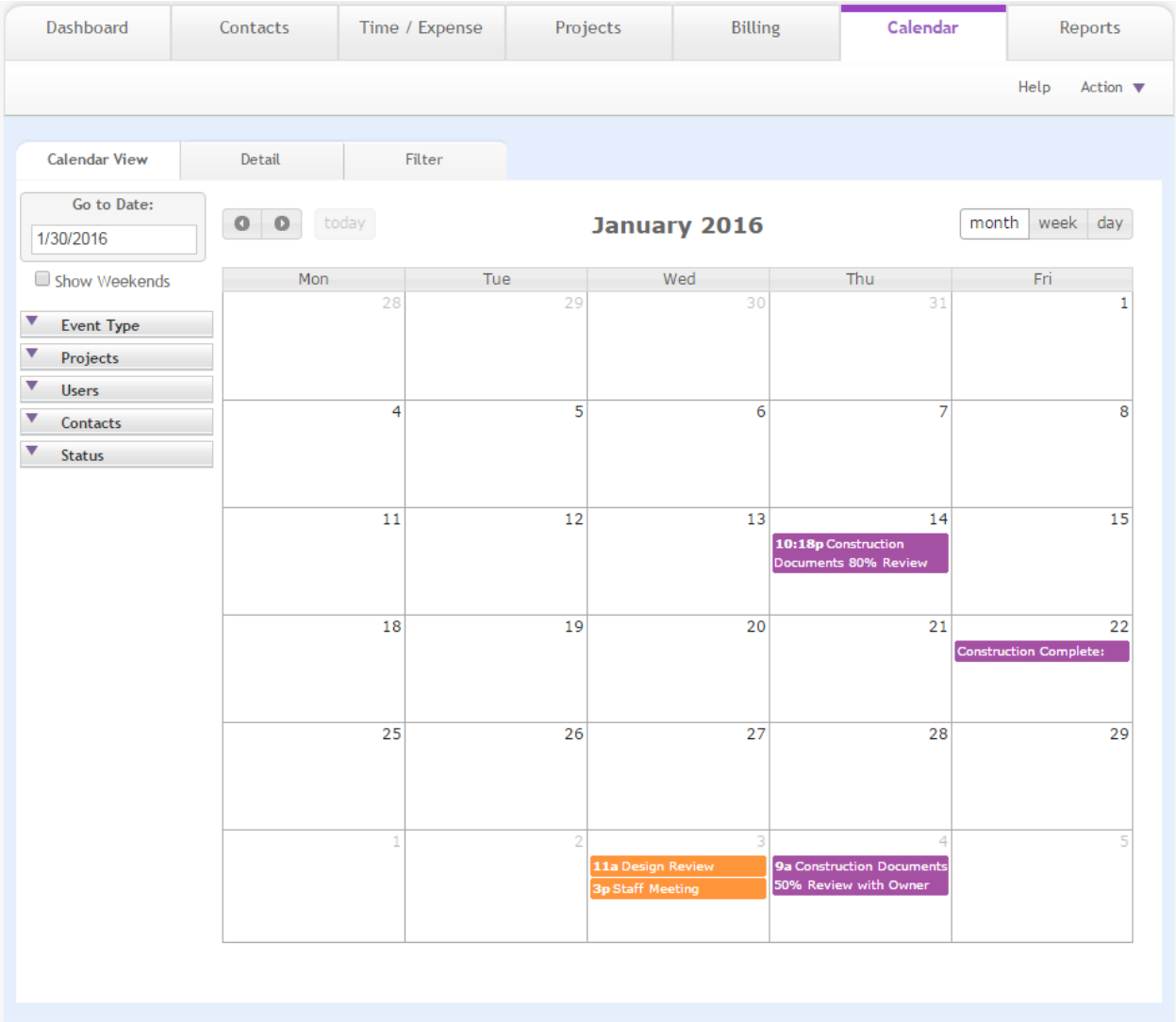
Find:
Select to locate events matching specific criteria. The resulting Found Set displays in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

Print:
Select this option to print a report of records displayed in the list view.

CALENDAR-CALENDAR VIEW

The Calendar View gives you an overview of all events scheduled for an entire month. You can navigate by month, week or day. Filters can be used to show only events scheduled in the current month for a particular project or employee. It is a great view to use when figuring out when people are available so that you can invite them to a new event. For the scheduled events, you get notifications before the event time.



Calendar

Go to Date:
Enter the date you want to view on the calendar and press Enter.

Show Weekends:
Select this option to include Saturdays and Sundays in the calendar.

Month/Week/Day:
Click one of these buttons to view events by day, week (7 days), or month.

Today:
Click this button to display the events and To-Do items scheduled for the current day.

Previous/Next Arrows:
Use these buttons to move backwards or forwards through your calendar.

Event Type:
Select or clear items in this panel to filter displayed events by type (that is, Appointment, Milestone, To-Do, etc.). ArchiOffice does not allow RFI and Submittal type events to be created from the Calendar View; however, these type of events can be created via Projects and Contacts screen and hence are shown in this filter list.

Projects:
Select or clear items in this panel to filter displayed events by project.

Users:
Make selections in this section to filter displayed events by assigned users.

Contacts:
Make selections in this section to filter displayed events by assigned contacts.

Status:
To filter out inactive events, clear Active in this section.

Click Clear to remove applied filters.

Update/Delete Event:
Click a scheduled event to update or delete it. You can edit the date and start/end time of an event.

Edit Event Details:
Double-click an event to go to the Calendar -Detail screen.

Hover your mouse over any event on the calendar to view its details.

Notifications:
For the scheduled events, ArchiOffice notifies you about them in the form of alerts that appear at the bottom-right of the screen upon login. You can click to see all such notifications. You can set a fixed amount of time prior to an event (in Preferences) that enables the system to pop up a reminder. You can even turn off these notifications.

Button Panel

Help:
Opens the ArchiOffice Help in the Calendar section.

Action:

New:
Select to create a new event.

My List:
Select to display a list of events to which you are associated.

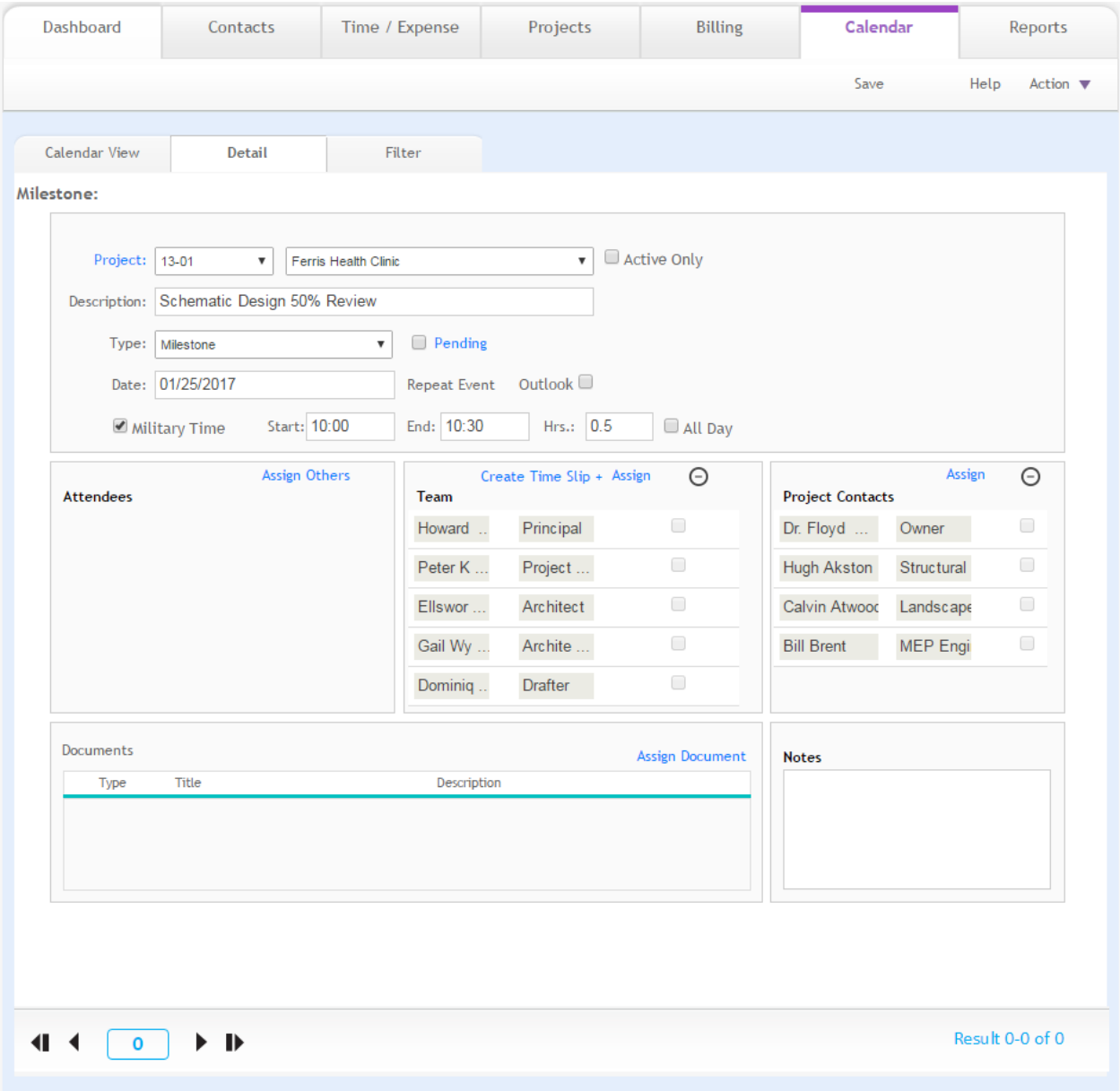
List:
Select to display a list of all events.

Find:
Select to locate event's matching specific criteria, with the resulting Found Set displayed in the List View.

Re-Find:
Select to return to the last used search criteria so you can modify the requests before executing the search.

CALENDAR-DETAIL

The Calendar-Detail screen shows information about the event such as the project, event, date, time, creator, notes, and who is invited to the event. The event could be a repeating event, and any document could be associated to the event as well.



Event Details

Project:
Select the number or name of the project for which the event is being scheduled. Click the field label to go to the selected project. If desired, you can filter by active projects only by checking the Active box. If an event is recorded against a 'non' active project and Active check box is selected, the Project drop-down will list this project apart from the active projects as a special case.

Description:
Enter the event name.

Type:
Specify the type of item you are scheduling (that is, To-Do, Milestone, and Appointment).

Pending/Achieved/Done:
A milestone and To-Do items have a default status of pending. When the milestone has been reached, click Pending, or select the adjacent check box, to change the status to Achieved. When Pending is clicked for a To-Do item, the status changes to Done.

Date:
Enter the date of the scheduled item.

Repeat Event:
Click this hyperlink to create or delete recurring events.

Outlook:
Select this check box to flag the event for syncing with Outlook.

Military Time:
Check this option to enter time in the military format (24-hour).

Start/End:
Specify the event's start and end time.

Hrs:
Displays the duration of the scheduled event in hours.

All Day:
Select this check box to schedule an event that spans all day.

Attendees:
Displays the contacts attending the event. Click Delete to remove the attendees. You can also click the *Assign Others* link to add additional contacts to the event.

A red exclamation mark displays next to the event date and attendees when a scheduling conflict occurs.

Team:
Displays the team assigned to the project for which the calendar item is being scheduled. Click the *Assign* link to add selected team members to the event's attendees list. Click

Delete ⊖ to remove a team. Click *Create Time Slip* + to create a time entry for the event.

Select the Project Phase, Job Code and Task/Description associated with the time entry from the corresponding drop-down lists.

If no tasks are assigned to a project (at the project level), the Task field does not show a drop-down and can be used to enter any description relevant to the time entry.

Project Contacts:
Select the check box of a listed project contact you want to invite to the event. Click the *Assign* link to add project contacts to the event's attendees list. When creating a new event, ArchiOffice pre-fills the default contact name but you can change it.

Assign Document:
Click this link to attach a document to the event.

Notes:
Enter notes regarding an event in this field.

Button Panel

Save:
Click to save the event settings.

Help:
Opens the ArchiOffice Help in the Calendar section.

Action

New:
Select to create a new event.

Delete:
Select to delete an event. This option is only available for users with the proper security privileges.

If an event selected for deletion is a recurring event, you will be prompted to delete the single event or all future events.

Duplicate:
Select to create a duplicate event.

Add:
Select to add the currently viewed event to your calendar program (that is, Microsoft Outlook, Entourage or Apple Contacts/Address Book).Your external program's event form will display. When adding an event to a third party program:

- Saving the form in the external program will add the event to the program's *ArchiOffice Calendar*. Any changes you made before saving and closing the form will be synced into the ArchiOffice.
- If you drag-and-drop the event in the external program to a new time, the information will change in ArchiOffice after the next Sync. If you change information in ArchiOffice, it will update your external program's event after the next synchronization.

View:
Select this option to display an event in your external program from this screen. This will find the event in your external program and display it in the program's normal event form.

My List:
Select to view a list of events assigned to you.

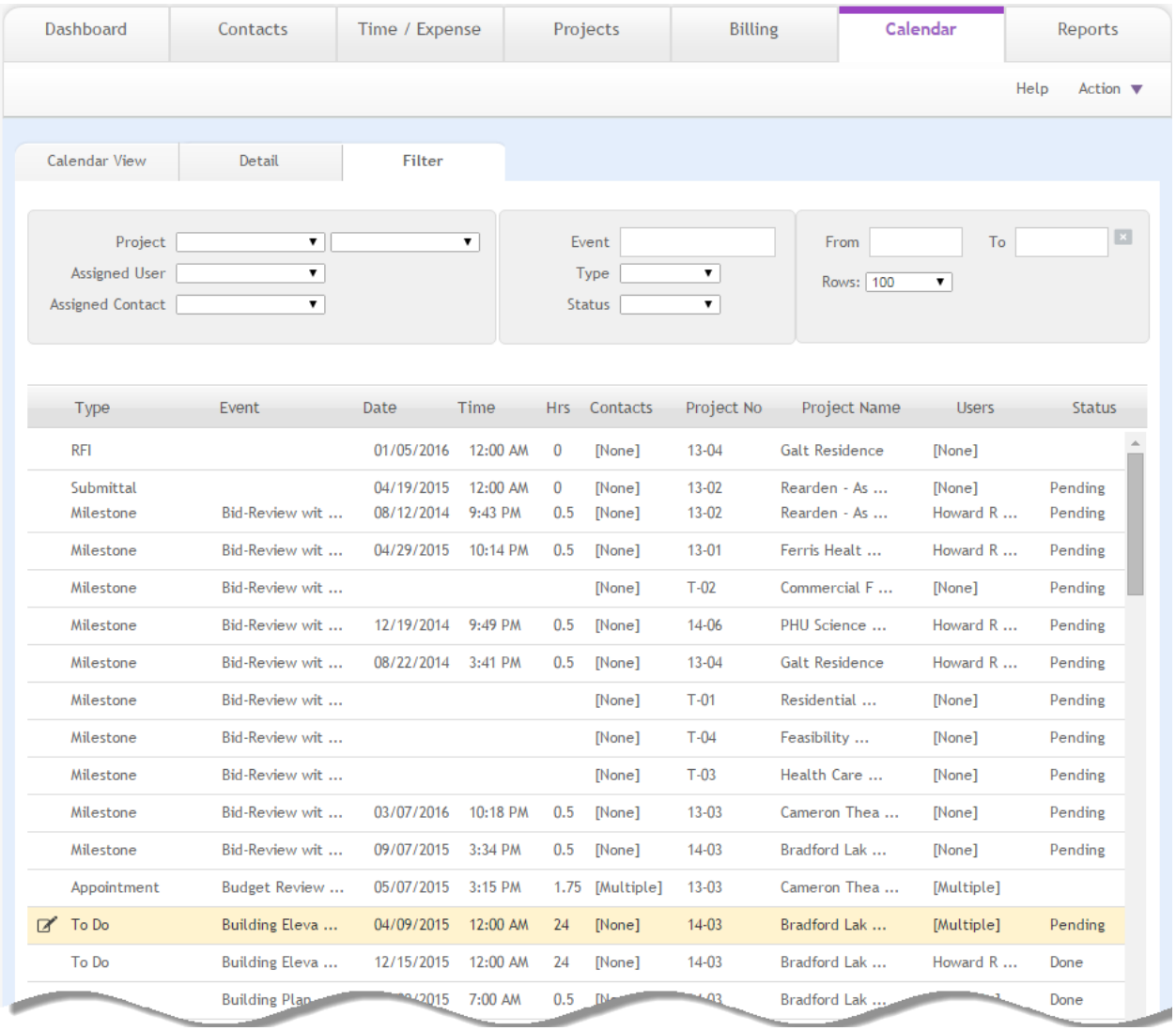
List:
Select to view a list of all events.

Find:
Select to locate event's matching specific criteria. The resulting Found Set displays in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

CALENDAR-FILTER

Use the options on this screen to find events quickly, to do and milestone items that meet specific filter criteria.



Filters

Use these filters to find scheduled events, to do items and milestones.

Rows:
Select the number of rows you want to see on the grid. The options range from 15 to 500. ArchiOffice memorizes the number of rows selected by you and displays the same next time you log in.

Grid

Displays a list of events that match your filter criteria.

View Events :
Click edit for a listed item to view or edit its details.

Sort Grid:
Click a column header to sort the list by the information in that column.

Button Panel

Help:
Opens the ArchiOffice Help in the Calendar section.

Action

New:
Select to create a new event.

My List:
Select to view a list of events assigned to you.

List:
Select to view all events.

Find:
Select to locate Event's matching specific criteria. The resulting Found Set displays in the List View.

Re-Find:
Select to return to the last Find criteria so you can modify the requests before executing the search.

How Do I

HOW DO I CREATE EVENTS?

With ArchiOffice, you can manage your firm's schedule using its Calendar module. You can add appointments, project milestones and To-Do items.

Do the following to create an event:

1. Click **Calendar** on the navigation bar.
2. Select **New** from the *Action* drop-down list on the Calendar button panel. The Calendar Detail View displays.
3. Select a project from the Project's list. You can select a project by its name or number.
4. Enter an event description.
5. Select an event type (Appointment, Milestone, To-Do).
6. Specify the event's date, start and end times.
7. Select the **All Day** check box for an event that will lasts a full day.

8. If this is a recurring event, click **Repeat Event** and set up the recurring settings.

9. Select the **Outlook** check box to sync the event with your Microsoft Outlook calendar. Mac users can select Entourage or Apple Calendar.

10. Enter notes or comments as needed.

11. Click the **Assign Document** link to attach a document to this event. The person setting up an event is automatically added to the current list.

12. Add additional team members to the attendee list from the Team panel.

13. Add additional Project contacts to the attendee list from the Project Contacts panel.

14. Click **Save** when you have finished.

HOW DO I CREATE TIME ENTRIES FROM EVENTS?

Do the following to create time entries from events:

1. Open an event in the Calendar -Detail screen.

2. In the *Team* section, click the **Create Time Slip +** link. If there are multiple attendees then you will be asked whether to create a time entry for one or all assigned team members.

3. Enter the project phase and job code for the time entry. Click **OK**.

A time entry will be created for this user, project, phase and job code with the meeting notes as the description.

HOW DO I BILL TO-DO ITEMS?

Do the following to bill a To-Do item:

1. Open the project you want to bill.

2. Click the **Events** tab.

3. Click a task with a status of *Done* (that is completed). This will open the details on the Calendar View.

4. In the *Team* section, click **Create Slip** + to begin the process of billing time against this task.

5. Select the **Project Phase** and **Job Code** and click **OK**.

6. To view the time billed against this task, go to the Time/Expense -Time screen.

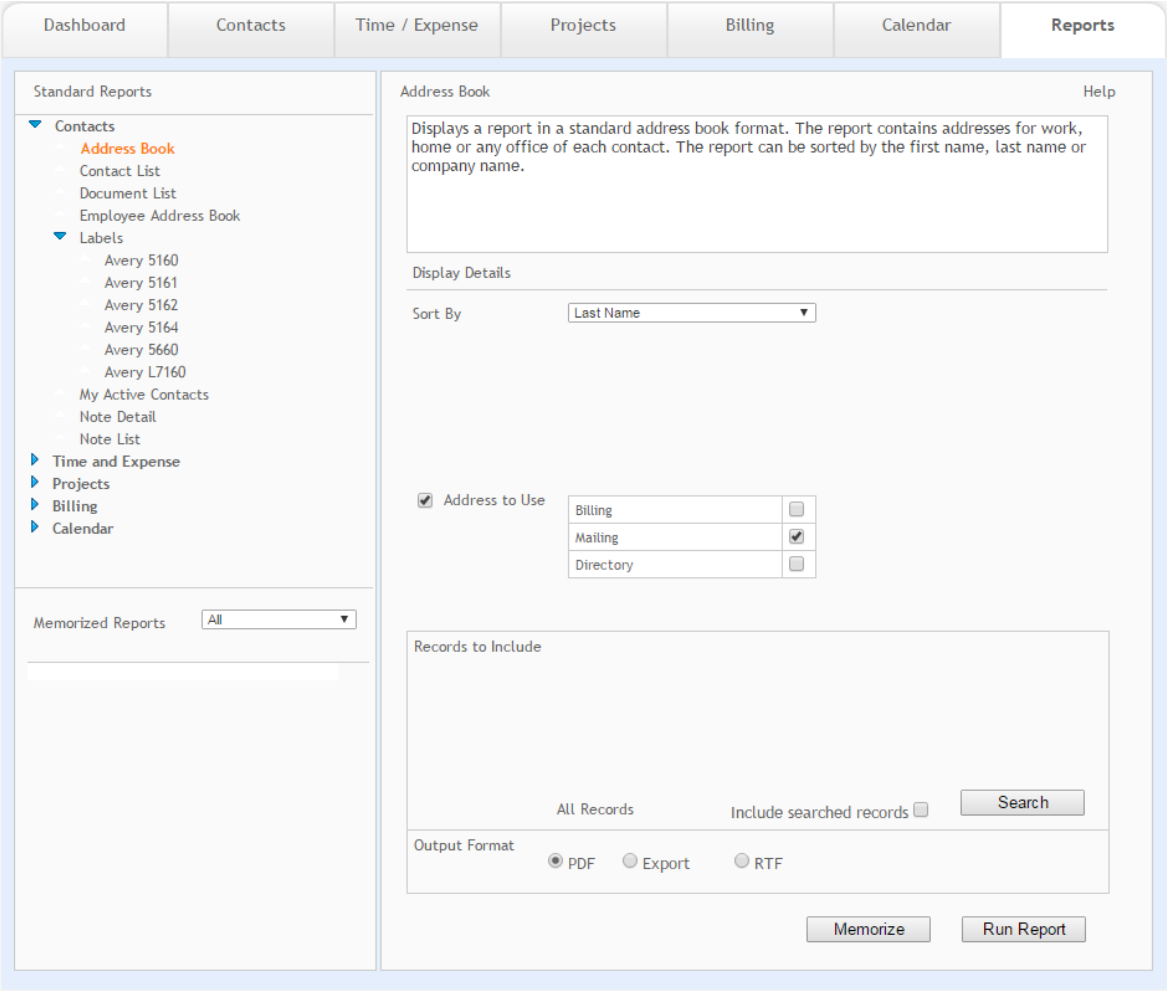
REPORTS

Reference

REPORTS

ArchiOffice provides a variety of standard reports for each of the ArchiOffice modules (that is, Contacts, Time and Expense, Projects, Billing and Calendar). The reports are generated using the Crystal Reports engine. You can control user access to reports by making the appropriate configurations in the user's report preferences. In addition, you can customize reports by adding your own logos and header/footer in Preferences > System > Reports.

The ArchiOffice reporting engine is organized by module. Each report can be configured to show detailed or summary data, along with a variety of display options (report dependent). The Reports screen remembers your last display options and search criteria for each report.



Standard Reports:
ArchiOffice provides you with a tree view of built-in reports that you can use.

The task reports are available in the Professional and Enterprise editions only. The submittal reports are available in the Enterprise edition only.

Memorized Reports:
You can build a report using the optional search criteria, then use **Memorize** to create a custom report. Custom reports save all your search criteria so you can run the report again in the future. You can save a memorized report as public (shared with all) or private (for you only).

Users - Security preferences dictate what reports you can view and run - including memorized reports.

Display Details

Sort By:
Select the criteria you want your report to sort by. You can sort the reports by items such as client, company name, contact name, city, project type, service type, principal, project leader, etc. The Reports screen remembers your last Sort By selection.

Type:
Choose one of the options from this drop-down list to display either detail or summary information for records included in the generated report. The Reports screen remembers your last Type selection.

Address to Use:
For contact reports, specify the address you want to include in the reports. You can select the billing, mailing or the directory address.

Totals:
For time and expense reports, make a selection from this drop-down list to display only summary totals or to total report values by day, week or month.

The available Display Details options vary by report.

Records to Include

Date:
You can select the desired date range when running the profitability reports, such as Today, This Quarter to Date, Last Year and Custom. This allows you to view the profitability on your projects during the various stages in its time line.

Project Status:
The Project Status filter option is available for all the billing reports. This makes it easy for you to generate these reports based on the status of the projects, such as Active, Inactive or All without having to run a special search.

Include searched records
Select this option to include only records found in the current module in the report. For example, if you ran a Find in the Projects module prior to accessing the Reports module, the report will only display the projects records included in that found set.

This check box is selected by default after running a search.

Search
Click this button to conduct a new search and create a new found set to use in the report. The module associated with the category to which the report belongs displays when this button is clicked (for example, Billing or Projects). All the filters and search criteria display on the report. If you want reports to show only active projects, then select Active as the Project Status on the Search screen.

Output Format

You can specify the format in which you want to generate your report. Available options include PDF, RTF, and Export (.csv Excel file). ArchiOffice remembers the format you used last time for the report, so the next time you run a report, the output format is pre-selected on user basis.

Use the export options to export data out of ArchiOffice for use by other applications. Typical uses of this feature are to export time entry data for charting and analysis or exporting specific contacts for mail merging.

Memorize
Click this button to save your display settings and search criteria for a report. This is a time-saver if you and your coworkers frequently print a report with the same settings. You will be given the option to share report settings with other ArchiOffice users or keep them private.

Run Report
Click this button to generate a selected report using the specified settings.

Button Panel

Help:
Opens the ArchiOffice Help in the Report section.

How Do I

HOW DO I RUN STANDARD REPORTS?

Do the following to run a one of the standard reports:

1. Click **Reports** on the navigation bar.
2. Select a report from the *Standard Reports* list.
3. Configure the settings displayed in the *Display Details* section.

The available Display Details options vary by report.

If you have saved configuration settings for a selected report, the custom settings display in the *Memorized Reports* section when the report is selected.

Do one of the following:

- Select the **Include searched records** check box to include the results from a recent search in the report.
- Click **Search** to create a new found set for the report.

Running a report with zero records currently in the found set, will result in running the report based on all available records in the system.

5. Choose an output format.
6. Click **Run Report** to generate the report.
7. To save the settings use for this report to use again, click **Memorize**.
8. Enter a name under which to save the settings and select the **Shared** check box to enable other users to view and run a report using these settings.

HOW DO I CONTROL REPORT ACCESS?

Do the following to control user access to specific reports.

1. Select **Preferences** from the *master* drop-down list.
2. Open the *Users* folder and click **Reports**.
3. In the *Users* section, select the user whose access privileges need to be changed.

If you have a long list of users, select the *Use Filter* check box and apply filter criteria to find a specific user quickly.

4. Make a selection from the *Reports* drop-down list (for example, Billing) to display category specific reports.
5. Select the check boxes by the reports to which you will have access. Clear a check box to deny access.
6. Click **Save**.

HOW DO I CHANGE REPORT LOGOS?

Do the following to change the logo that displays on a report header or footer.

1. Select Preferences from the *master* drop-down list.
2. Open the *System* folder and click **Reports Logos**.
3. Click **Add** for the report header or footer image.
4. Browse to the folder in which the logo image is located and select.

HOW DO I EXPORT REPORT DATA TO EXCEL?

The ArchiOffice Reports screen displays settings (that is, Detail or Summary, Sort options and Totals) that can be used to run and view the reports as a PDF, in the viewer or as an RTF output. The Export output option only exports a list of the records you selected for inclusion in the report.

Do the following to save reports in Excel format, while maintaining your display detail settings:

1. Click **Reports** on the navigation bar.
2. Select a report for printing from the *Standard Reports* list.
3. Configure the display detail settings (that is, Type, Sort, Totals, etc.) and select the records to include in the report.
4. Choose Export as the output format and click Run Report.

DOCUMENT MANAGEMENT

DOCUMENT MANAGEMENT OVERVIEW

The ArchiOffice Document Management system is a powerful part of the program. It provides you with the ability to create new documents quickly from professional templates, attach other existing files, and ensures that all documents for contacts and projects are organized in a central location on the file server. This also eliminates the error of you saving files to your local machines and misfiling documents in the wrong project folders.

Documents can be created for any contact or project. The documents appear on the Documents portal, which lists the chronological history of all files and is accessible to all users. You can use powerful filters to find particular documents efficiently within the portal.

A template is a document created by an ArchiOffice administrator in Word or Excel that contains pre-set information, which can contain both text and images. This allows documents between ArchiOffice users and their clients to be consistent and professional. It also saves time by eliminating the need for you to keep creating the same documents from scratch repeatedly.

ArchiOffice provides more than 70 pre-built document templates for common architectural needs. These templates are located in a *Templates* sub-folder found within the *ArchiOffice Documents* folder on the file server. These document templates can be customized to suit your needs. You can also use your existing templates and attach them to ArchiOffice, so you can continue to use your company templates. In addition, your templates can be customized with ArchiOffice fields so the contact/project data is automatically merged when you create these documents.

You can specify various templates in ArchiOffice. The system comes with a variety of standard template categories installed.

ArchiOffice Template Categories	
Project & Drawing Information	Correspondence
Pricing & Bidding	Construction Administration
Promotion	General
Labels	Envelopes
Invoices	

Another powerful document management capability is that you can take your existing document files and folders, and attach them to a project or contact record, or link an existing file or folder as well. This helps integrate your existing document management seamlessly with ArchiOffice. We recommend creating and managing your documents from within ArchiOffice because then you do not have to worry about linking the external documents to the right projects.

All ArchiOffice users on your network must have read/write access to the ArchiOffice Documents folder on your server.

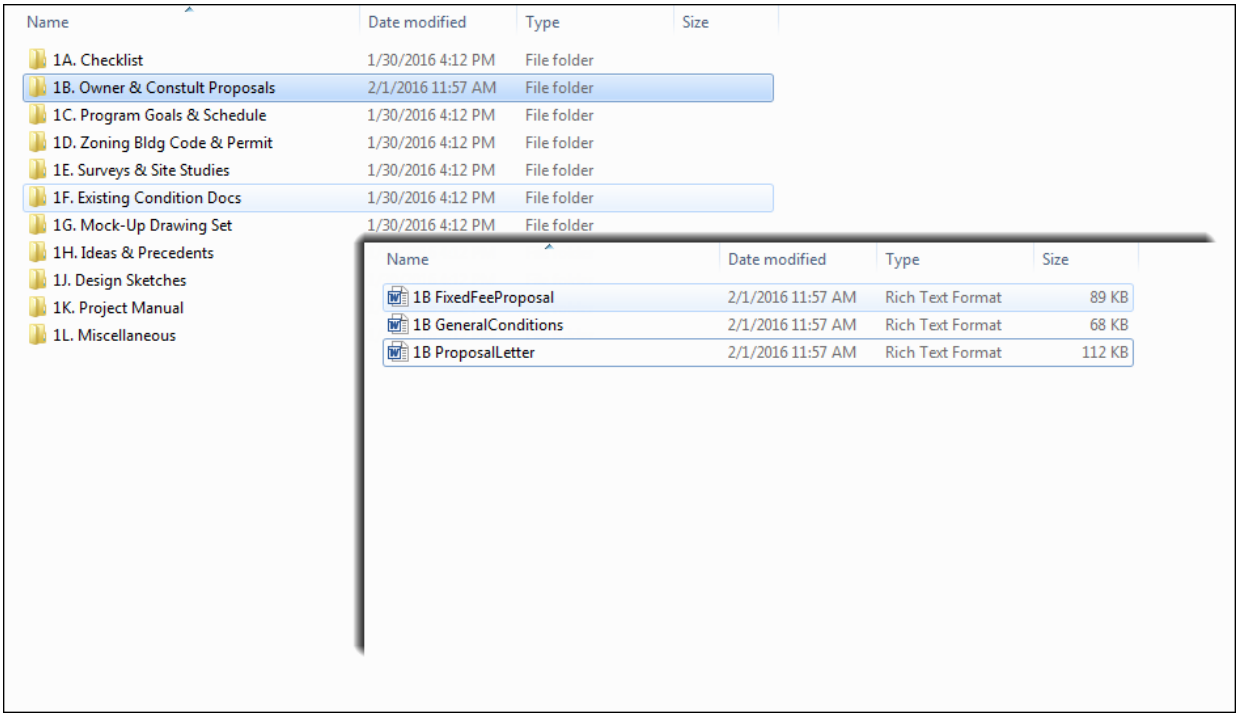
The Document Management feature is available in the ArchiOffice Pro and Enterprise editions only.

DOCUMENT TEMPLATES

The ArchiOffice Document Management system is a powerful part of the program. The document management system comes over 70 pre-built document templates for common architectural needs. These templates are located in a *Templates* sub folder, found within the ArchiOffice Documents folder, on the ArchiOffice server or a file server.

A template is a document created by an ArchiOffice administrator in Word or Excel that contains pre-set information, which can contain both text and images. This allows communication between ArchiOffice users and their clients to be consistent and professional. It also saves time by eliminating the need for ArchiOffice users to keep creating the same documents from scratch over and over again.

The document templates enable users to quickly create new documents from existing corporate templates and ensure that all files for contacts and projects are organized in a central location on the file server. The template is a copy of the original, but no data will be merged in. The 2017 templates are in the RTF format (.rtf files) and can be modified to suit your needs. They can be modified by the administrator in Word or Excel, so that they can be customized for the firm (logos, fonts, etc.). In addition, the administrator can create a new document template and add it to the ArchiOffice system for use.



You can use other types of documents as templates in ArchiOffice (for example, Fast Track project plan or a AutoCad file). The *RTF Field Substitution* option must be unavailable to use other document types because these applications do not support data merging functionality. As the 2017 templates are in the RTF format (.rtf files), you can modify these templates to suit your needs or, if you have older Word (.doc) templates, you can save those old templates in the .rtf format.

All ArchiOffice users on your network must have read/write access to the ArchiOffice Documents folder on your server.

DEFAULT FILING SYSTEM

ArchiOffice comes with document templates to help expedite creating frequently used documents in your offices. The templates are organized by folders, sub-folders and document templates.

The following provides a listing of all default ArchiOffice folders, sub-folders, and document templates provided. This can be customized by the administrator in the Documents > Template area found in Preferences.

ArchiOffice Filing System		
Folder	**Sub-folder**	**Documents**
Project & Drawing Info	Checklist	Civil Checklist Checklist Summary
	Owner & Consult Proposal	Fixed Fee Proposal General Conditions Proposal Letter
	Program Goals & Schedule	Program Goals
	Zoning Bldg Code & Permit	Preliminary Code Reside. Zoning Code
	Surveys & Site Studies	
	Existing Condition Docs	Exist Condition Checklist
	Mock-Up Drawing Set	
	Ideas & Precedents	
	Design Sketches	Arch Sketch Log
	Project Manual	Bid Form Bid Instructions Project Manual Cover
	Miscellaneous	Fax Cover Sheet
Correspondence	Directory	
	Owner	Proj. Dev. Cost New Folder
	Miscellaneous	
Pricing and Bidding	Design Pricing Documents	
	Design Pricing Addenda	Addendum Des. Addendum Receipt Des.
Construction	Owner Contractor Agreement	

	Contractor Bonds & Insure	
	Building Permit	
	Construction Schedule	
	Field Reports	Field Reports
	Pay Rqst. & Sched. Values	Pay Request Log Sworn Statement Lien Waiver
	Shop Drawings & Log	Shop Drawing Log
	Punch List & Subst. Comp.	Punch list
General	Miscellaneous	Letter Transmittal Memorandum
Envelope		#10 B5 C5 DL Monarch
Labels		Avery 3261 – Large Avery 3261 – Small Avery 5160 Avery 5161 Avery 5162 Avery 5164 Single Label

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HOW DO I CREATE NEW DOCUMENTS FROM QUICK DOCS?

Do the following to create a new document from a document template for an existing contact or project:

1. Locate the contact or project record for which the document will be created.
2. Select **New** from the *Action* drop-down list on the Documents portal to begin the document creation process.
3. Click the **Quick Docs** tab that contains the template to be used for the new document.
4. Enter a document title and description.
    - **Assigned Project** - Use these fields to assign this document to a different project.
    - **Assigned Contacts** - Use these fields to assign this document to different contacts.
5. Click the **Create** button to designate where the new file should be stored (in which folder and sub-folder).

6. The new document has been added to the Documents portal. Select on any item listed to open that item from the file server in its native program.
7. You can review file specific information by clicking **Info** on the portal.
8. You can delete a specific file by clicking **Delete** on the portal. Only privileged users can delete documents from ArchiOffice.
9. A confirmation message displays, do one of the following:

- **Delete File and Link**: Click **Both** to delete the file from the file server and removes the reference to that file from ArchiOffice.
- **Delete Link Only**: Click **Link** to delete the reference to that file from ArchiOffice and leaves the file on the file server.

At various points in this procedure, you can cancel the process. If an error occurs, the appropriate message will be displayed and the current operation automatically aborted. The ArchiOffice administrator should then be contacted for further assistance.

HOW DO I CREATE NEW DOCUMENTS FROM ALL DOCS?

Do the following to create a new document from an existing document template for a contact or project:

1. Select a contact or project record.
2. Select **New** from the *Action* drop-down list on the Document Portal button panel to begin the document creation process. The Add a New Document window displays.
3. Click the **All Docs** tab.
4. Select the *folder* that contains the template to be used for the new document.
5. Enter a document title and description.
    - **Assign Project** - Use these fields to assign this document to a different project.
    - **Assign Contact** - Use these fields to assign this document to a different contact.
6. Click **Create**.
7. The new document opens in the appropriate program for editing. Finish editing the document and use the applications **Save** option to save the changes.

    The Document has already been named and filed to the appropriate location on the file server.

    Do not use *Save As*. If you are creating a new document for a Project, and the Document is not a controlled document (that is, The administrator has predefined where this document should automatically be filed by choosing a specific folder and divider.), you are prompted to designate where the new file should be stored (in which folder and sub-folder).

8. The new document has been added to the Documents portal. You can select any listed item to open it from the file server in its native program.
9. You can review file specific information by clicking the listed file in the Portal row.

10. The user can delete a specific file by clicking **Delete** on the portal. You will be prompted to do one of the following:

    - **Delete File and Link**: Click **Both** to delete the file from the file server and removes the reference to that file from ArchiOffice.
    - **Delete Link Only**: Click **Link** to delete the reference to that file from ArchiOffice and leaves the file on the file server.

Only privileged users can delete documents from ArchiOffice.

HOW DO I ATTACH EXISTING FILES AND FOLDERS?

Do the following to attach an existing file or folder containing files to an existing contact or project record:

1. Locate the contact or project record to which the documents will be attached, and click the **Documents** tab.
2. Select **New** from the *Action* drop-down list on the Document button panel. The New Document screen displays.
3. Click the **Attach** tab.
4. Select an attach option:
    - **Move File**: Moves the file from the current location to the *ArchiOffice Documents* folder on your file server.
    - **Move Folder**: Moves the entire folder contents from the current location to the *ArchiOffice Documents* folder on your file server.
    - **Duplicate File**: Duplicates the file to the *ArchiOffice Documents* folder on your file server.
    - **Duplicate Folder**: Duplicates the entire folder contents to the *ArchiOffice Documents* folder on your file server.
    - **Link File**: Does not move the selected file; it will remain in its original location, but linked to ArchiOffice.
    - **Link Folder**: Does not move the entire contents of the selected folder; all files in the folder remain in their original location but are linked to ArchiOffice.
5. Click **Select** to browse to and select the source file or folder. Any file type can be attached.
6. Choose the **Document Date** Option. You can use the current date/time or use the file or folder's creation date.
7. Enter a document title, description, and if necessary, change the contact and project details.
    - **Assigned Project** - Allows you to assign this document to a different project.
    - **Assigned Contacts** - Allows you to assign this document to a different contact.

8. The selected folder/file has been added to the Documents portal. Select any item listed to open it from the file server in its native program.
9. Click Create to designate where the new file should be stored (that is, in which folder and sub-folder).
10. You can review file specific information by clicking **Info** on the document row.
11. You can delete a specific file by clicking **Delete** on the portal row. Only privileged users can delete documents from ArchiOffice.

    - **Delete File and Link**: Click **Both** to delete the file from the file server and removes the reference to that file from ArchiOffice.
    - **Delete Link Only**: Click **Link** to delete the reference to that file from ArchiOffice and leaves the file on the file server.

Wait for the folder or file to be copied. If Folder attachment has been selected a progress bar will be displayed while the relevant folders and files are created and copied. This can take time if you are adding a folder of several hundred documents; please be patient and do not interrupt the process.

At various stages in this process, a Cancel button allows for the current operation to be aborted. If an error occurs, the appropriate message will be displayed and the current operation automatically aborted. The ArchiOffice administrator should then be contacted for further assistance.

HOW DO I CREATE CUSTOM DOCUMENT TEMPLATES?

Do the following to create a customized document template:

Customizing and creating document templates is a complicated process. If you prefer, you can contact BQE Support for assistance or sign up for our ArchiOffice Trainings to learn how to customize templates. We can also create document templates for you from your existing corporate documents.

1. Open Microsoft Word and select **File > Open** from the menu.
2. Browse to the *Templates*2017 folder on the ArchiOffice server and select an existing template (for example, Transmittal). The following is the default path: *C:\ArchiOfficeData\2017\Templates*2017.

   It is best to create a new document using one of the existing templates that comes with ArchiOffice. Pick one that contains the type of information that you will need for your own template. For example, an envelope contains only contact information, whereas a purchase order contains contact, project, vendor, and your company information.

   For illustrative purposes, this procedure uses the Transmittal document as an example.

3. Modify the template as necessary. You can insert graphics (for example, company logo), change the font, change the font size, etc.

4. The template contains merge fields enclosed by caret symbols (for example, <<ContactFullName>>). You can make as many copies of field code as needed and move the fields wherever you need to display information in the final document.
5. To insert additional fields, open the *New Merge Fields* document located in the ArchiOffice *Templates*2017 folder (if it is not available there, please download it from ArchiOffice Support Downloads). This file lists all the fields available for use. Copy and paste the corresponding field into your customized template.

   Always include the << >> symbols with the field name (for example, <<ContactFirstName>>) or data will not merge into your document when created from ArchiOffice.

6. Select **File > Save As** and save the document template with a new name (for example, My_Company_Transmittal.doc).
7. Close the template and exit Microsoft Word.
8. In ArchiOffice, select Preferences from the *master* drop-down list.
9. Open the *Documents* folder and click **Template**.
10. Select the folder in the *Document Templates* tree in which the new template will be added (for example, General).
11. Click **Add** .
12. Browse to and select the template you created.
13. In the *Template Details* section, enter descriptive detail and configure the available settings as needed. See Preferences -Documents-Template for further detail on the available template settings. The template has now been added to the system and is ready for use.

You can attach Microsoft Excel files as templates, but you will not be able to merge data into Excel from ArchiOffice. Due to the format of the documents and the merging tools available, this functionality is not available.

HOW DO I MOVE DOCUMENTS ON A SERVER?

At some point, you might have the need to move your ArchiOffice documents folder to a new partition or hard drive on your server. You might want to do this after migrating from a previous ArchiOffice version or you need to move the files to a location with more space.

Check out the Knowledge Base article How do I move my documents on a server for it.

HOW DO I ENABLE MACROS?

All users must enable macros when creating new Microsoft Office documents from document templates. These documents merge in information from ArchiOffice by automatically running a macro when the document is being created.

Microsoft Office macro security setting can be modified via the Trust Center (File > Options >Trust Center). Set the macro security setting so you will be prompted to allow macros to run or completely enable macros if you do not want to be prompted.

Beware of other documents that might contain viruses if you use the Low setting!

DATA INTEGRATION

Accounting

ARCHIOFFICE-QUICKBOOKS INTEGRATION

ArchiOffice-QuickBooks integration feature enables you to synchronize data with QuickBooks (get and send data). For detailed integration details and information on which QuickBooks editions are supported, see the ArchiOffice-QuickBooks Advanced Integration Guide.

Please make sure you have the latest version of Java installed on your system to view the documents in Google Chrome.

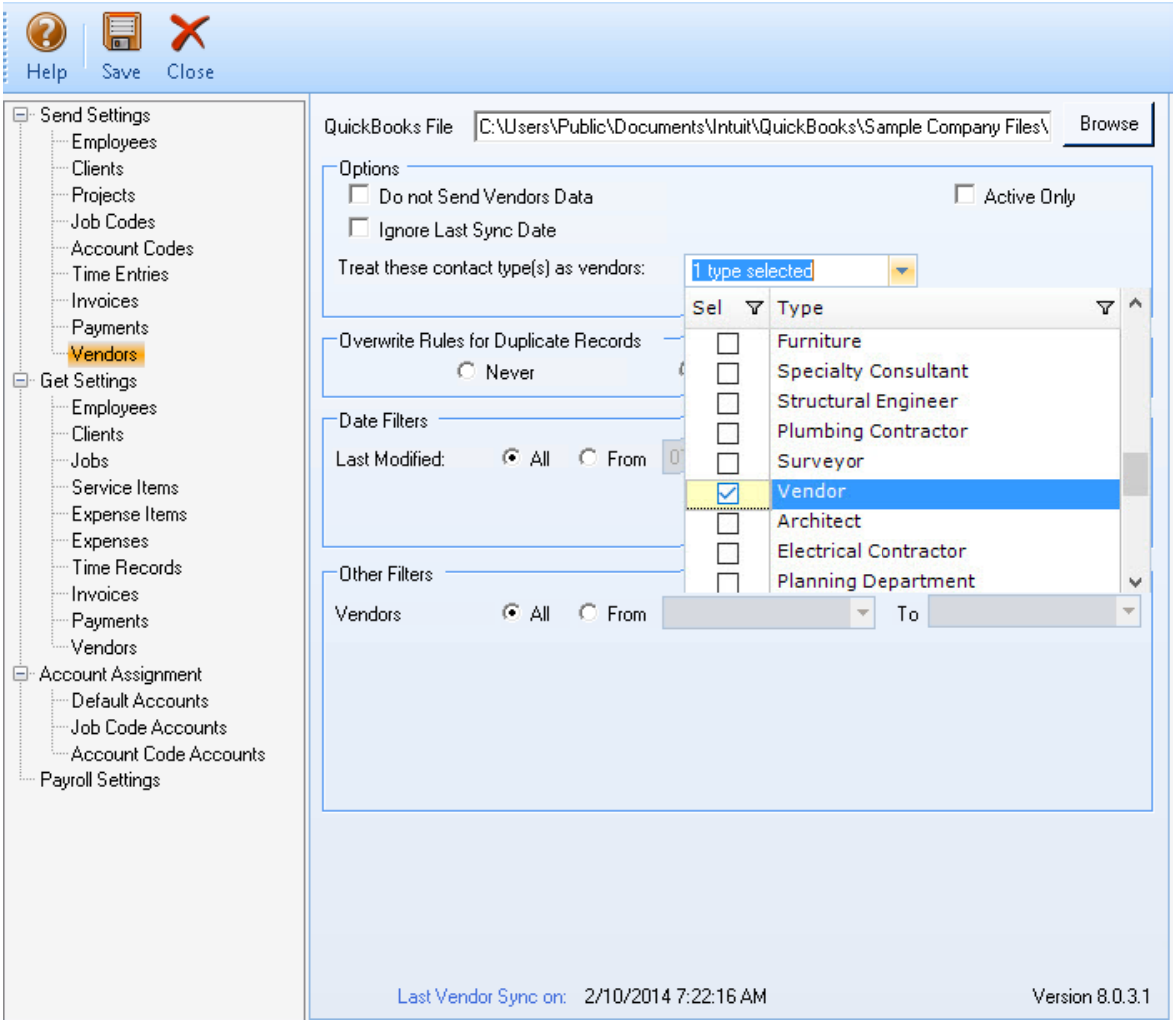
Reference

ARCHIOFFICE-QUICKBOOKS INTEGRATION - SEND SETTINGS

Use the ArchiOffice-QuickBooks Integration Settings screen to transfer data from ArchiOffice to QuickBooks database. Using the Send Settings option, you can specify what data will be sent from ArchiOffice to QuickBooks.

Click on the *Send Settings* option to view the list of modules. The screen allows you to restrict the data that is sent from ArchiOffice. You can send data from the following ArchiOffice modules to QuickBooks:

- Employees
- Clients
- Projects
- Job Codes
- Account Codes
- Time Entries
- Invoices
- Payments
- Vendors



With this service, you can reduce data entry time and minimize errors. Select the module name in ArchiOffice to view the filter settings for that module. For each module, you define what data you want to send to QuickBooks.

The filter options on the right would change based on the module selected. For each module, the screen would display:

QuickBooks File
This shows your current QuickBooks database that will be used for data synchronization.

Browse
Use this button to locate the QuickBooks database for data synchronization. By default, ArchiOffice always connects to the currently open QuickBooks company file. However, if QuickBooks is not running, then ArchiOffice tries to open the file specified in the *QuickBooks File* field.

You need to permit ArchiOffice to open the specific company database even when QuickBooks is not running. You can find this permission option available on the dialog box run by QuickBooks when you try to sync the QuickBooks database with the ArchiOffice database.

Options

Do Not Send . . . Data:
Check this option if you do not want ArchiOffice to send data for the selected module. You can check this option if you do not want to send data for a specific ArchiOffice module to QuickBooks. For example, if you do not want to send employee data from ArchiOffice to QuickBooks, you check the *Do not send Employee Data* option. Data from other modules is sent to QuickBooks according to their specific filter settings.

Ignore Last Sync Date:
When selected, ArchiOffice ignores the date when it had last synced with QuickBooks for the selected table for the integration. The *Last Sync On* date is displayed below the table list. This date is used for reference when we want ArchiOffice to sync since the last synchronization date. By default, it is unchecked.

Active Only:
When selected, only active ArchiOffice data is looked during data transfer (for example, active employees, clients, vendors, etc.).

When sending contacts, you can choose to send the selected types of contacts as vendors in QuickBooks. A drop-down on the screen allows you to select the contact types that you want to send as a vendor from ArchiOffice.

If the 'Transfer *From retainer* as invoice line item' option is selected on the Send Settings > Payments screen, the retainer (along with the payment) is sent over to QuickBooks as a single line item and a single invoice is created. Otherwise, the retainer is sent as a separate item and two separate invoices (retainer and payment) are created.

Overwrite Rules for Duplicate Records

In this section specify the overwrite rule for the selected table. Choose from Never, Always or Most Recent. For example, both ArchiOffice and QuickBooks have records for employee John Doe.

Never
When chosen, neither ArchiOffice nor QuickBooks version of a field data is updated. Thus, you will have two versions of the data. For example, if this employee record has different addresses, these two fields would not be updated and both addresses would exist.

Always
When selected, the contents of the QuickBooks field will always overwrite the ArchiOffice field in Get mode. Again, if two different addresses exist, the address in QuickBooks will replace the address in the employee's ArchiOffice profile. However, billed entries will not be modified.

Most Recent
When selected, ArchiOffice compares the *Last Modified On* date-time stamps for the QuickBooks and ArchiOffice fields. The more recent one updates the field in the other database.

Filters allow you to restrict the information that is transferred between ArchiOffice and QuickBooks. For example, if you would like to transfer only one group of clients from ArchiOffice to QuickBooks select that Client Group ID in both the *From* and *To* drop-down menus of the Client Group ID filter. The filter fields keep on changing depending upon the table selected for the synchronization settings. The intersection of data produced by applying all filters is what will be transferred. Click *Save* to save your filter settings and overwrite rule for the selected table. These settings will be used when you sync data between ArchiOffice and QuickBooks.

Date Filters

Last Modified:
Each record saves a *Last Modified On* date that is used to determine which record is most recent. This is useful and saves time, if you want to avoid scanning the records every time you use the synchronization option.

You can filter the information for sync, based on this date using the *From-To* options. Filters allow you to restrict the information that is transferred between ArchiOffice and QuickBooks. If you select *All* in this submenu, then data for all ArchiOffice tables is transferred to/from QuickBooks.

Date:
This option is available for time entries only. It allows you to select a From-To date range for getting selective time data from QuickBooks instead of all.

Other Filters

In this section, you have other filters which you can use to restrict the data sent from ArchiOffice to QuickBooks using relevant fields and *From-To* settings to specify a range. If you choose *All* (selected by default) all data is sent.

Last Sync on:
This displays the date when ArchiOffice was last synced with QuickBooks for the selected module. This date is used for reference when you want ArchiOffice to sync since the last synchronization date.

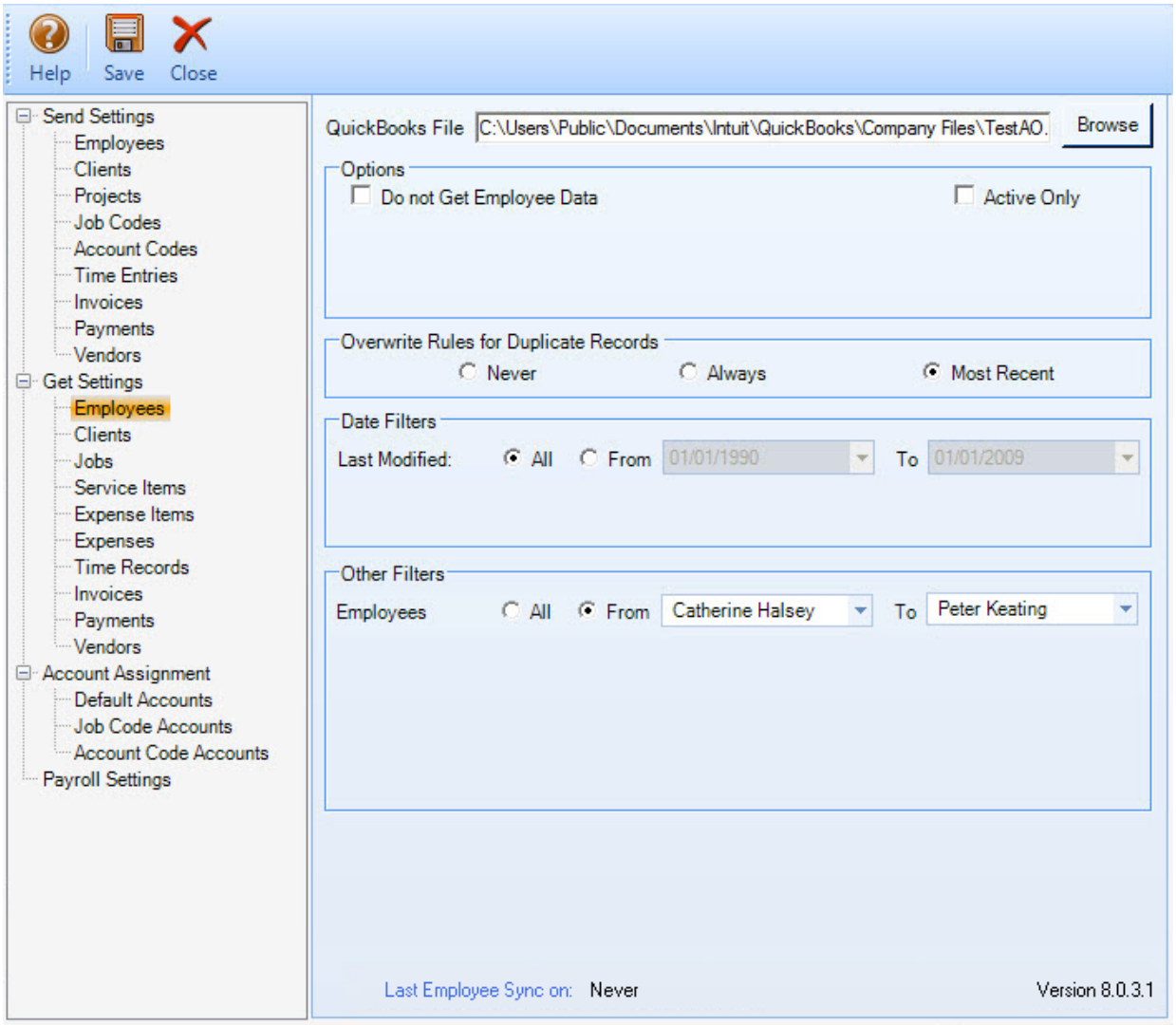
ARCHIOFFICE-QUICKBOOKS INTEGRATION SETTINGS - GET SETTINGS

By specifying the synchronization settings in the ArchiOffice-QuickBooks Integration Settings screen, you can set transfer rules defining how data is transferred from QuickBooks to ArchiOffice database. You can specify which data to get using the filter settings for each module. Various modules for which you can specify the Get Settings are:

- Employees
- Clients
- Jobs
- Service Items
- Expense Items
- Expenses
- Time Records
- Invoices
- Payments
- Vendors

With this, you can reduce data entry time and minimize errors. Select the module name in QuickBooks to view the filter settings for that module. For each module, you define what data you want to send from QuickBooks to ArchiOffice.

The filter options change based on the module selected.



QuickBooks File
This shows your current QuickBooks database that will be accessed for synchronization.

Options

Do Not Get . . . Data:
Check this option if you do not want ArchiOffice to get data for the selected module. You can check this option if you do not want to get data for a specific ArchiOffice module from QuickBooks. For example, if you do not want to get employee data from QuickBooks to ArchiOffice, you select the *Do not Get Employee Data* check box. Data from other modules is transferred from QuickBooks according to their specific filter settings.

Vendor Related Expense Entries:
Expense entries (that is, Vendor Bills, Checks or Credit card charges) coming from QuickBooks that have vendors associated to them must be recorded against a Project Leader, Project Principal or Originator in ArchiOffice. The system first attempts to record the entries against the Project Leader of the expense's project. If a Project leader is not present, the Project Principal of the expense's project is used. If neither a Project Leader nor a Principal has been assigned, the Project Originator of the expense's project is used. If none of these three is present, then the expense entries are recorded against any user. The vendor associated to the entries in QuickBooks will display in the notes/description field of the Time/Expense - Detail screen.

Make a selection from this drop-down list to select the person manually against which vendor related expense entries should be recorded in ArchiOffice.

Active Only:
When selected, only active ArchiOffice data (for example, active employees, clients, vendors, etc.) is transferred.

Overwrite Rule for Duplicate Records

In this section specify the overwrite rule for the selected table. Choose from Never, Always and Most Recent. For example, Both ArchiOffice and QuickBooks have records for employee John Doe.

Never
This means neither ArchiOffice nor QuickBooks version of a field data will be updated. Thus, you will have two versions of the data. For example, if this employee record has different addresses, these two fields would not be updated and both addresses would exist.

Always
This means the contents of the QuickBooks field will always overwrite the ArchiOffice field in Get mode. Again, if two different addresses exist, the address in ArchiOffice will replace the address in the employee's QuickBooks profile. However, billed entries will not be modified.

Most Recent
This means ArchiOffice compares the *Last Modified On* date-time stamps for the QuickBooks and ArchiOffice fields. The more recent one updates the field in the other database.

Date Filters

Filters allow you to restrict the information that is transferred between ArchiOffice and QuickBooks. The filter fields keep on changing depending upon the table selected for the synchronization settings. The intersection of data produced by applying all filters is what will be transferred. Click *Save* to save your filter settings and overwrite rule for the selected table. These settings will be used when you sync data between ArchiOffice and QuickBooks.

Last Modified:
Each record saves a *Last Modified On* date that is used to determine which record is most recent. This is useful and saves time, if you want to avoid scanning the records every time you use the synchronization option.

You can filter the information for synchronization based on this date using the *From-To* options. Filters allow you to restrict the information that is transferred between ArchiOffice and QuickBooks. If you select *All* in this submenu then data for all ArchiOffice tables will be transferred to/from QuickBooks.

Date:
This option is available for time and expense entries only. It allows you to select a From-To date range for getting selective time and expense data from QuickBooks instead of all.

Other Filters

You can filter information for synchronization using *From-To* options. Filters allow you to restrict the information that is transferred between ArchiOffice and QuickBooks. If you select *All*, then data for all ArchiOffice tables will be transferred from QuickBooks.

The filter options available here depend on the module you have selected.

Last Sync On:
This displays the date when ArchiOffice was last synced with QuickBooks for the selected module. This date is used for reference when you want ArchiOffice to sync since the last synchronization date.

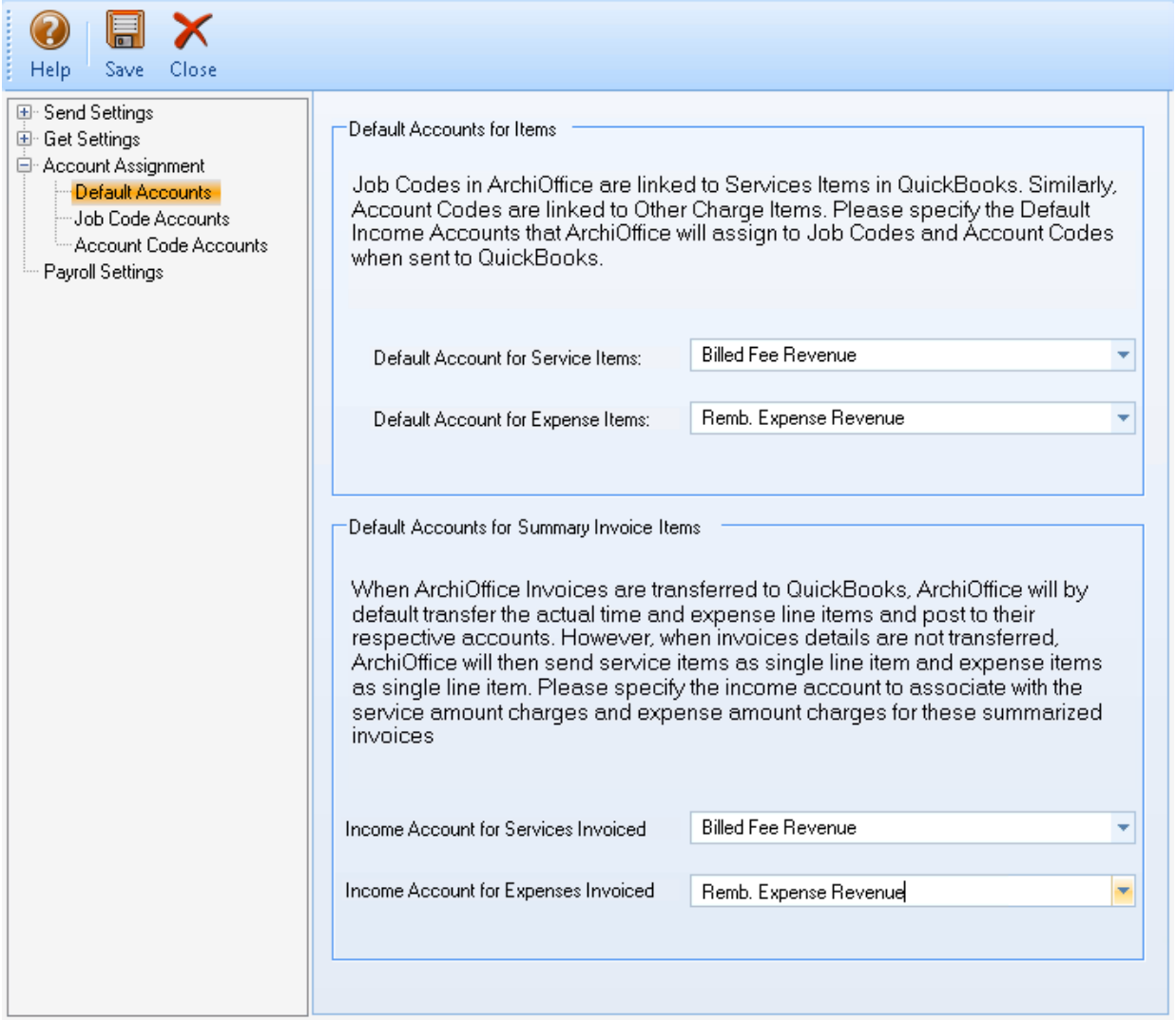
When getting expense codes from QuickBooks to ArchiOffice, the product column in QuickBooks is not checked. For non-inventory items, the product column is checked.

When getting expense entries associated with vendor bills, credit cards or checks, ArchiOffice records them against the Project Leader by default. However, if not available, it will record them against the Principal and if that person is not available against the project originator. If ArchiOffice is unable to find any of these, it will set a default user called QBExpense to record the expense entry against. However, you can choose the record the entry against the contact of your choice from the drop-down in the Integration Settings screen.

When getting time entries from QuickBooks, ArchiOffice skips time entries recorded against vendors.

ARCHIOFFICE-QUICKBOOKS INTEGRATION SETTINGS - ACCOUNT ASSIGNMENT

Use the ArchiOffice-QuickBooks Integration Settings screen to assign QuickBooks accounts for ArchiOffice activity (job codes), expense (account codes) and invoice data being transferred. You can specify which data to assign accounts using the list on the left. Various options are provided to set the default accounts.



Default Accounts

Default Accounts for Items

In the Default Accounts section, you can specify the default income account to be assigned to activity codes in ArchiOffice when they are sent to QuickBooks as service items, and expense codes in ArchiOffice when they are sent to QuickBooks as charge items; and their related invoices.

Default Accounts for Service Items:
Activity codes in ArchiOffice are linked to service items in QuickBooks. Every service item in QuickBooks must be assigned to an income account. The QuickBooks income account selected here will be assigned to all service items (activity codes) that were created when ArchiOffice job codes were sent to QuickBooks. By default, *Other Income* account is selected but you can select any other account name from the drop-down list.

Default Accounts for Expense Items:
Expense codes in ArchiOffice are linked to *Other Charge Items* in QuickBooks. Every expense item in QuickBooks must be assigned to an income account. The QuickBooks income account selected here will be assigned to all expense items that were created when ArchiOffice expense codes were sent to QuickBooks. By default, *Other Income* account is selected but you can select any other account name from the drop-down list.

Default Accounts for Summary Invoice Items
When ArchiOffice invoices are transferred to QuickBooks, by default, it transfers the actual time and expense line items and posts to their respective accounts. However, when invoice details are not transferred (see option on Invoices panel), ArchiOffice sends service items as single line item. You should specify the income account to associate with the service amount charges and expense amount charges for these summarized invoices.

> **Invoice Account for Services Invoiced:**
> This is the QuickBooks income account where the service total of your ArchiOffice invoices will transfer. By default, *Other Income* account is selected but you can select any other account name from the drop-down list.
>
> **Invoice Account for Expenses Invoiced:**
> This is the QuickBooks income account where the expense total of your ArchiOffice invoices will transfer. By default, *Other Income* account is selected but you can select any other account name from the drop-down list.

Activity Accounts

Besides the default account, you can specify an income and expense account for each ArchiOffice activity code (service item). You can select an activity (or multiple activities) from the grid and assign the desired account to it. If you leave it blank, ArchiOffice uses the default account previously specified.

Income Account for Services Invoiced:
The QuickBooks income account chosen here is assigned to the selected activity (or activities). By default, *Other Income* account is selected but you can select any other account name from the drop-down list.

Expense Account for Services Invoiced:
The QuickBooks expense account chosen here is assigned to the selected activity (or activities). By default, *Other Income* account is selected but you can select any other account name from the drop-down list.

Expense Item Accounts

Like activity codes, you can specify income and expense account for each ArchiOffice expense code (other charge item). You can select an expense (or multiple expenses) from

the grid and assign the desired account to it. If you leave it blank, ArchiOffice uses the default account previously specified.

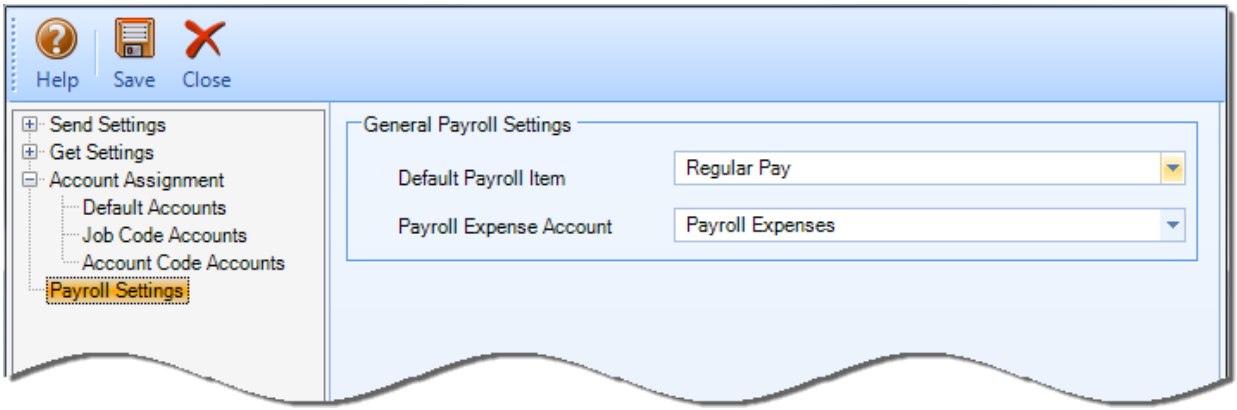
Income Account for Services Invoiced:
The QuickBooks income account chosen here is assigned to the selected expense (or expenses). By default, *Other Income* account is selected but you can select any other account name from the drop-down list.

Expense Account for Services Invoiced:
The QuickBooks expense account selected here is assigned to the selected expense (or expenses). By default, *Other Income* account is selected but you can select any other account name from the drop-down list.

ARCHIOFFICE-QUICKBOOKS INTEGRATION SETTINGS - PAYROLL SETTINGS

Payroll items must be assigned to accounts in QuickBooks. ArchiOffice allows you to assign QuickBooks payroll items and accounts to chargeable and non-chargeable time entries for each employee. The time data transferred is assigned to the specified payroll item and account in QuickBooks. You can specify the payroll items on the Payroll Settings panel of the ArchiOffice-QuickBooks Integration Settings screen. You need to set these options if you want to transfer time data from ArchiOffice to QuickBooks for payroll purposes.

The following are descriptions of fields on this screen:



General Payroll Settings

Default Payroll Item:
You can specify a QuickBooks payroll item or wage type as the default payroll item. For example, you can select Regular Pay or Salary as the default payroll type for ArchiOffice employees.

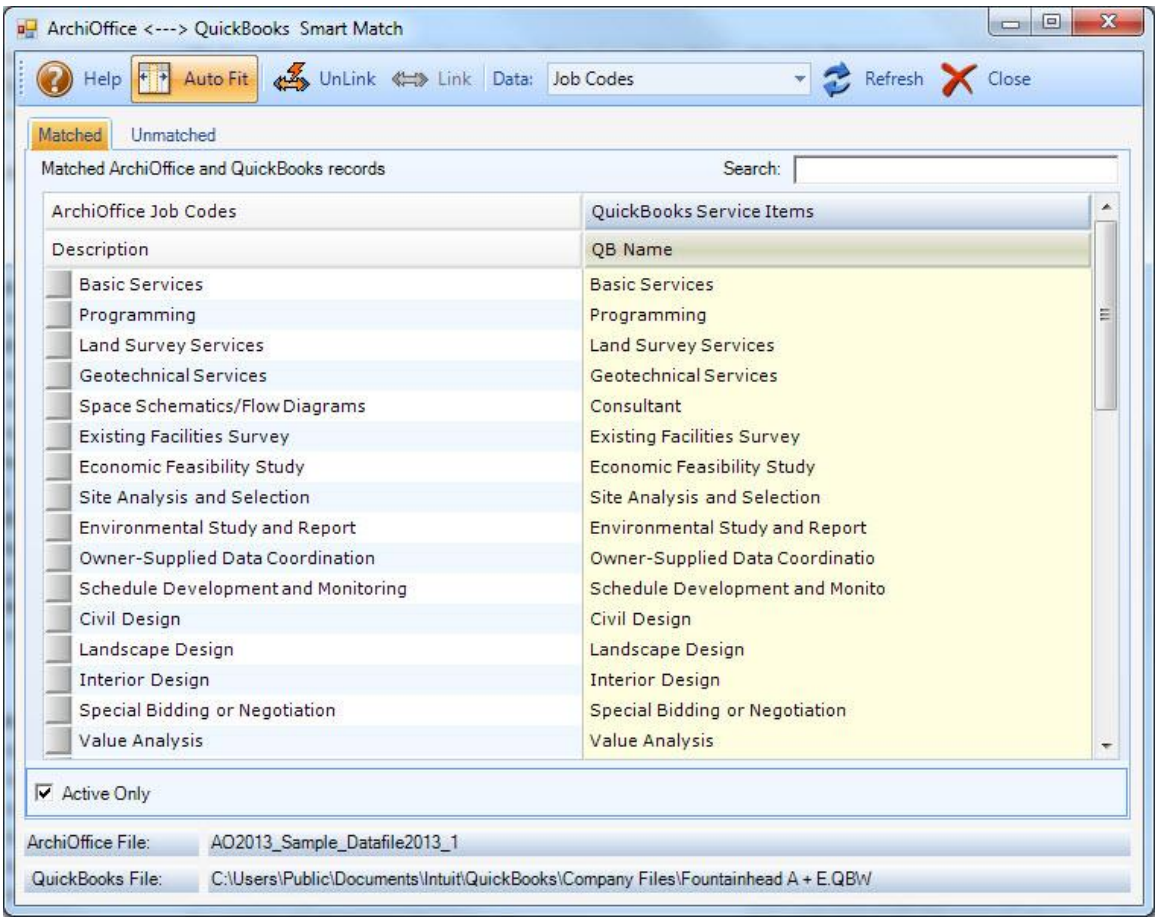
Payroll Expense Account:
You can specify a QuickBooks account for payroll expenses. By default, *Payroll Expenses* is selected but you can choose another expense account from the drop-down list.

ARCHIOFFICE-QUICKBOOKS SMART MATCH

If you have been using ArchiOffice and QuickBooks independently and have a set of clients, projects (jobs), employees, invoices and payments in both databases, you can integrate this data using the ArchiOffice-QuickBooks Smart Match tool. You only need run it once, after which data can be synchronized automatically in real time.

The ArchiOffice-QuickBooks Smart Match tool attempts to find matching data-both active and inactive -and links them automatically. If it fails to find a match, you will be able to match it manually. If you want to skip auto-match for certain tables, you have the option to select only the desired ones. The name of the ArchiOffice and QuickBooks databases being matched displays at the bottom of the screen.

The synchronization feature requires Java and works with its current version.



Matched Tab

You can view matched or linked ArchiOffice and QuickBooks data in this grid. ArchiOffice data is displayed on the left column and QuickBooks data on the right. The data fields displayed in the grid depend upon the option selected in *Data* drop-down list on the toolbar. For example, if you select Clients in the Data field, you can view the client data

already matched between the two applications. The grid will display the ArchiOffice Clients and the corresponding matched QuickBooks Customers. You have the option of selecting the matched records and then unlinking them.

Search:
Use this field to search for a particular record in the grids. You can search for a record using full or partial ID, name or any other field. Matching records display in the grid based on what you type in the search box. The items displayed get narrowed down as you keep on typing. For example, you might want to search for a record whose ID starts with letter A. As you type letter A, all IDs beginning with letter A are displayed in the grid. As you keep on typing more letters, it displays results that are more relevant.

Unmatched Tab

You can view the unmatched or unlinked ArchiOffice and QuickBooks data in this grid. ArchiOffice data is displayed on the left column and QuickBooks data on the right. The data fields displayed in the grid depend upon the option selected in *Data* drop-down list on the toolbar. For example, if you select Clients in the Data field, you can view the client data that can be matched between the two applications. The grid will display the ArchiOffice Clients and the QuickBooks Customers. You have the option of selecting the desired records and then linking them.

Use the search boxes on this tab to search for a particular record in the grid. You can search for a record using full or partial ID, name or any other field. Matching records display in the grid based on what you type in the search text box. The items displayed get narrowed down as you keep on typing. For example, you might want to search for a record whose ID starts with letter A. As you type letter A, all IDs beginning with letter A are displayed in the grid. As you keep on typing more letters, it displays results that are more relevant.

Active Only:
Select this check box on either the Matched or Unmatched tab to view employee, project and job code records with an *Active* status.

Smart Match Button Panel

Help:
Opens ArchiOffice Help in the ArchiOffice-QuickBooks Smart Match section.

Auto Fit:
Click to adjust all columns automatically to fit in the grid window. Regardless of the settings, you can adjust column width manually. This option is on by default.

UnLink:
Select the records in the *Matched* grid and then click this button to unlink the matched records between ArchiOffice and QuickBooks. This button is only activated on the *Matched* tab.

Link:
Select the records in the *Unmatched* grid and then click this button to link the unmatched records between ArchiOffice and QuickBooks. This button is only activated on the *Unmatched* tab.

Data:
Select the ArchiOffice module name from this drop-down list containing the data to be matched or unmatched. For example, if you select Clients in the *Data* field, you can view the client data that can be matched between the two applications. The grid will display the ArchiOffice Clients and the QuickBooks Customers.

Refresh:
Click to view the latest data from ArchiOffice and QuickBooks.

Close:
Closes the screen.

Sync

SYNCHRONIZATION OVERVIEW

ArchiOffice can sync its contacts, emails and calendar events with the most popular business applications you use—Microsoft Outlook (PC), Entourage (Mac) and Apple's own suite of products (Apple Mail, Apple Contacts/Address Book and Apple Calendar/iCal).

- **Shared Contact Database**: Any client information updated in other programs is easily synced and made available to everyone in your firm. The reverse is also true—any information updated in ArchiOffice can easily be synced back to your other applications.
- **Database of Project-Related Emails**: You can separate your personal and extraneous emails from project and business content and only import pertinent emails to the database. You can quickly create an email archive in ArchiOffice ensuring that even if you delete or lose email from your standard email program, ArchiOffice has the back-up information. That includes the attachments as well.
- **Shared Calendar**: Easily isolate the events, milestones and to-dos for one or multiple employees or projects. You can also overlap employee calendars for easy scheduling and bill for allotted time right from the calendar itself.

How Do I

HOW DO I SET UP MAC SYNCING?

The following information provides instructions for setting up ArchiOffice to synchronize events, contacts, and emails with your client software (that is, Entourage or Apple Mail, Apple Contacts and Apple Calendar). You will learn how to:

- **Set Up ArchiOffice Sync Preferences**

  To configure ArchiOffice to sync your data, read the integration whitepaper.

- **Sync Your Data**

After setting up your system and ArchiOffice, you can begin syncing data. First, you need to sync contacts, email and events from ArchiOffice to Entourage, Apple Contacts, Apple Mail or Apple Calendar.

Make sure before you begin, you have Entourage, Apple Contacts, Apple Mail, or Apple Calendar open.

1. Do one or all of the following as needed:

Contacts

a. Click **Contacts** on the navigation bar and open a contact record in detail view.

b. Select **Add** from the *Action* drop-down list on the Contacts button panel. The contact will be added with the ArchiOffice Contacts category.

Email

c. In the Contacts Detail View, find the contact's email address in the top right section of contact detail.

d. Click email to the right of the email address field. A new email will open up and automatically address your contact.

Events

e. In the Calendar View, find an event and open it in the detail view.

f. Make sure you have assigned the proper details including *Date*, *Start Time*, *End Time*, *and Attendee.* You must include yourself as an attendee.

g. Select **Add** from the *Action* drop-down list on the Calendar button panel.

2. Syncing from Entourage, Apple Contacts, Apple Mail, Apple Calendar to ArchiOffice:

Contacts

a. Assign the contact to the ArchiOffice Contacts category in your client software.

b. In ArchiOffice, select **Sync** from the *master* drop-down list.

c. Select the **Contacts** check box and click **Sync**. This will add the contact to our list in ArchiOffice.

Email

d. You must first add the Contacts folder to your email client. To do so, begin an email from the contact record in ArchiOffice, then close the email message. This will propagate the folder with the contact company or project name into the ArchiOffice folder found in your email client's inbox.

e. From your email client, drag any emails from your inbox to the corresponding client/project folder.

f. In ArchiOffice, select **Sync** from the *master* drop-down list.

g. Select the **Email** check box and click **Sync**. This will add the email to your Contacts or Projects Documents tab.

Events

h. Create and assign the contact to the ArchiOffice Calendar category in your client software.

i. In ArchiOffice, select **Sync** from the *master* drop-down list.

j. Select the **Events** check box and click **Sync**. This will add the event to your calendar in ArchiOffice.

The synchronization feature requires Java and works with its current version. Please check out the Apple Integration whitepaper for more.

HOW DO I SET UP OUTLOOK SYNCING?

The following information provides instructions for setting up ArchiOffice to synchronize events, contacts, and emails with Microsoft Outlook. You will learn how to prepare your system to sync data and how to set up ArchiOffice Sync preferences. The following information covers how to sync your data after the setup is complete.

- **Set Up ArchiOffice**

Now that your system is ready, you need to do the following to configure ArchiOffice to sync your data:

These steps must be done for each ArchiOffice user that will be syncing data.

1. Select Preferences from the *master* drop-down list.

2. Open the *Users* folder and click **Sync**.
3. Select a user in the *Users* list and select the **Use Synchronization** check box
4. Choose **Outlook** in the *PC Client* box and in the *Outlook Mailbox* field, specify the name of the user's inbox. It is where ArchiOffice data will be organized in the user's Outlook installation. Typically, this folder is called *Personal Folders* or *Mailbox - User Name or user email address*. Information in these folders is saved to the user's Outlook data file (*.pst).
5. Open the *Documents* preferences folder and click **Type**.
6. In the *Ext PC* column, make sure the email document type is *EML*. Click **Save** if you make any change.
7. In the *Users* folder, click **Details**.
8. Select a user in the *Users* list and click **Go to Contact**.
9. Make sure the *Directory*, *Outlook* and *Sync* check boxes are selected.
10. Click **Save**.

- Sync Data

After setting up your system and ArchiOffice, you can begin syncing data. First, you need to add contacts, email and events from ArchiOffice to Outlook.

The synchronization feature requires Java and works with its current version. Please check out the Microsoft Outlook Integration whitepaper for more.

HOW DO I SYNC WITH EXTERNAL APPLICATIONS?

ArchiOffice can sync its contacts, emails and event items with third party applications such as Microsoft Outlook, Entourage, Apple Calendar/iCal, Apple Contacts/Address Book and Apple Mail.

Do the following to sync data with third party applications:

1. Select **Sync** from the *master* drop-down list.
2. A confirmation displays. Select or clear the items (that is, contacts, emails, events) to be synchronized or accept the default settings.
3. Click **Sync**.

Check out the Microsoft Outlook Integration and Apple Integration whitepaper for details.

HOW DO I ADD CONTACTS TO AN EXTERNAL APP?

To add a contact record to a third party program (for example, Microsoft Outlook or Entourage), do the following:

1. Navigate to a contact record in ArchiOffice.

2. Select **Add** from the *Action* drop-down list on the Contacts screen. Your third party contact program opens, displaying the contact record.

3. Edit the profile if needed and click **Save**.

Any changes made to the profile will also display in the corresponding record in ArchiOffice after you save and close the profile.

HOW DO I SEND EMAILS TO CONTACTS?

Do the following to send an email to a contact:

1. Click **Contacts** on the navigation bar.
2. Click a listed contact record or select **Find** from the *Action* drop-down list on the Contacts button panel to search for a record if needed.
3. Click **Email** for the email address you are going to use.

   Emails can also be sent from the Projects -General-Info screen.

4. Your default email client displays. Enter additional email addresses as needed (for example, To or CC). Enter a subject, your email message and send the message. After sending the email, a copy displays in the Documents portal of the Contacts Detail View. In addition:

   - **PC Users**: After sending your email, a copy is placed in the ArchiOffice sub-folder created in your email client.
   - **Mac users**: After sending an email, you must manually move the sent email to the ArchiOffice folder in your email client.

When you send an email via ArchiOffice, it creates an ArchiOffice folder and sub folders in your email client. The ArchiOffice folder has three main sub-folders: Project eMails, Company eMails, and Contact eMails. If the contact is not associated with a project but has a company name entered in its profile, the email goes into the Company subfolder. If the contact is not associated with a project and does not have a specified company name in its profile, the email goes into the Contact Emails folder. When you send an email an email from Projects -General-Info, the email goes into the Project eMails sub-folder.

Read the relevant whitepaper for more details:

- Send to Outlook Contacts
- Send to Apple Contacts

APPENDIX

DEFAULT MASTER TASKS

Here is a listing of all default ArchiOffice tasks provided. This can be customized by the administrator in the Preferences > Project > Tasks screen.

Phase 01-Pre-Design

Administration	Circulate Kick-Of Documents to Team
Administration	Owner -Architect Letter of Agreement
Administration	Send Letter to Owner Re: Total Project Development cost
Administration	State Registration
Administration	Errors & Omissions Insurance
Administration	Solicit Proposals from Consultants
Administration	Send Package of Final Concept Phase Documents to Owner
Reports	Preliminary Zoning Review
Reports	Preliminary Program
Reports	Send Preliminary Zoning Review to Municipalities
Reports	Preliminary Code Review
Reports	Send Preliminary Code Review to Municipalities
Reports	Site Survey
Reports	Owner's Building Standards
Reports	Preliminary Project Schedule
Reports	Fee Budget
Documents	Goal Statements
Documents	Diagrams of each Scheme
Documents	Character Sketches
Documents	Narrative Descriptions
Documents	Statement of Cost Objectives

Phase 02-Schematic Design

Administration	Start Project Diaries
Administration	Set-Up Project Book
Administration	Send Owner Checklist to Owner
Administration	Verify Proposed Utility Connections
Administration	Outside Cost Reviews
Administration	Send Package of Final Schematic Phase Documents to Owner
Administration	Consultant Contracts Signed
Reports	Site Survey
Reports	Soils Report
Reports	goals Board
Reports	Zoning & Code Analysis
Reports	code Analysis-consultants
Reports	Graphic or Written Program
Reports	Environmental Impact Study (if required)
Reports	Schematic Design Staffing Schedule
Reports	Project Schedule

Reports	Fee Budget
Reports	Schematic Design Documents Schedule
Reports	Drawing Cartoons
Documents	Building Enclosure
Documents	Finish Material
Documents	Civil Engineering
Documents	Structural System
Documents	Mechanical / Plumbing
Documents	Electrical System
Documents	Perspectives
Documents	Building Study Model
Documents	Lighting Concept
Documents	color & Materials Board
Documents	Site & Landscape Plan
Documents	Building Plans
Documents	Building Elevations-character
Documents	Typical Sections
Documents	Area Calculations / comparison to Program
Documents	Civil Engineering Plan
Documents	Structural Plan with Critical Member Sizes
Documents	Preliminary HVAC Diagrams
Documents	Preliminary Plumbing & Fire Protection Diagrams
Documents	Preliminary Electrical Diagram
Documents	Scope Specifications-all Divisions
Documents	Schedules: Room Finish & Door
Documents	Blank

Phase 03-Design Development

Administration	Receive Details / Specifications of items to be Provided by Owner
Administration	Receive List of Proprietary Specification Items Required by Owner
Administration	Obtain Utility Connection Approvals (letters of confirmation from utility companies
Administration	Outside Cost Review
Administration	Send Package of Final Design Documents to Owner
Reports	Goal Statements
Reports	Zoning & Code Analysis
Reports	code Analysis-consultants
Reports	Design Development Staffing Schedule
Reports	Project Schedule
Reports	Fee Budget
Reports	Design Development Document Schedule
Reports	Drawing Cartoons
Documents	Typical Reflected Ceiling Plans
Documents	Sketch Studies and Isometrics of Key Details and Assemblies
Documents	Coordinate Major Building Systems with Consultants
Documents	Site and Landscape Plan
Documents	Floor Plans
Documents	Partial Plans Key Areas
Documents	Building Elevations

Documents	Building Sections
Documents	Typical Wall Sections
Documents	Interior Elevations Key Areas
Documents	Vertical Circulation Sections
Documents	Room Finish Schedule
Documents	Product cut Sheets for all Major Components
Documents	Fixture Cuts for Lighting & Plumbing
Documents	Color & Materials Boards
Documents	Civil Engineering Plans
Documents	Structural Plans
Documents	HVAC Plans
Documents	Plumbing & Fire Protection Plans
Documents	Electrical Plans
Documents	Scope Specifications Update
Documents	Preliminary Keynote List
Documents	Final Area Calculations

Phase 04-Construction Documents

Administration	Schedule 50%, Interim and Final Document Reviews
Administration	Insurance Instructions from Owner
Administration	Bidding Instructions Reviewed with Owner
Administration	All Disciplines Coordinated and Checked
Administration	Prepare Reprographics or Diskettes of Base Sheets for Consultants
Administration	Outside Cost Review
Reports	Zoning & Code Analysis
Reports	code Analysis-consultants
Reports	Construction Documents Staffing Schedule
Reports	Construction Documents Schedule
Reports	Project Schedule
Reports	Fee Budget
Reports	Prepare Complete Construction Drawings Cartoon / Check Set
Documents	Title Sheet
Documents	General Information Sheet-Keynotes, Location Plan
Documents	Floor Plans
Documents	Partial Floor Plans
Documents	Building Elevations Details
Documents	Building Sections Details
Documents	Interior Elevations & Details
Documents	Reflected Ceiling Plans
Documents	Vertical Circulation Details
Documents	Schedules: Room Finish, Door and Partition
Documents	Civil Plans, Details & Schedules
Documents	Structural Plans, Detail & Schedules
Documents	HVAC Plans, Details & Schedules
Documents	Plumbing & Fire Protection Plans, Details & Schedules
Documents	Electrical Plans, Details & Schedules
Documents	Project Manual Complete
Documents	Product Book

Phase 05-Construction Procurement

Pre-Biding Activities	Contact Selected Bidders
Pre-Biding Activities	Distribute Invitation to Bid
Pre-Biding Activities	Recommend Contractors to Owner for Negotiation
Pre-Biding Activities	Prepare Bid Documents Distribution List
Pre-Biding Activities	Distribute Bidding Documents to Bidders
Pre-Biding Activities	Prepare and Issue Addenda as Necessary
Bid Evaluation	Receive, Tabulate and Analyze Bids; use Bid Summary Form
Bid Evaluation	Evaluate Proposed Substitutions if requested by Contractor
Bid Evaluation	Advise Owner to Accept or Reject Bids
Bid Evaluation	Obtain Owner's Acceptance of one or Rejection of All Bids
Bid Evaluation	Notify Successful Bidders of Acceptance
Contract Award	Notify Unsuccessful Bidders
Contract Award	Advise Owner of Selection of Alternates, Obtain Owner's Approval and Notify
Contract Award	Assist Owner in Preparation of construction Contracts
Contract Award	Assist Owner with Letters of Intent, if Required; Assist Owner and Contractors

Phase 06-Contract Administration

Project Start-Up	Project Directory-Construction
Project Start-Up	Receive Copy of Owner / Contractor Agreement
Project Start-Up	Receive copy of Contractor's Certificate of Insurance
Project Start-Up	Preconstruction Meeting with Owner and Contractor
Project Start-Up	Establish Schedule for Site Visits
Project Start-Up	Begin Architects Construction Phase Diary
Project Start-Up	Begin Contractor's Construction Schedule
Project Start-Up	Receive Contractor's List of Subcontractors
Project Start-Up	Receive and Review Contractors Schedule of Values
Project Start-Up	Prepare Bulletin Log
Project Start-Up	Review Procedures for Issuing Bulletins
Project Start-Up	Prepare ASK Log
Project Start-Up	Review Procedures for Issuing Sketches
Project Start-Up	Prepare Change Order Log
Project Start-Up	Review Procedures for Issuing Change Orders with Owner and Contractor
Project Start-Up	Prepare Payout Request Log
Project Start-Up	Review Procedures for Submittal and Review of Payout Requests with Contractor
Project Start-Up	Prepare Construction Phase Transmittals
Project Close-Out	Prepare Punch List for Substantial Completion
Project Close-Out	Receive punch Lists of Consultants

Project Close-Out	Issue Certificate of Substantial Completion
Project Close-Out	Schedule Reinsertions
Project Close-Out	Verify that Record Documents have been Delivered to Owner
Project Close-Out	Receive Punch Lists of Consultants
Project Close-Out	Issue Certificate of Substantial Completion
Project Close-Out	Schedule Reinsertions
Project Close-Out	Verify that Record Documents have been Delivered to Owner
Project Close-Out	Verify that Warranties and Guarantees have been Delivered to Owner
Project Close-Out	Verify that Operation and Maintenance Data have been Received by Owner
Project Close-Out	Verify Punch List Work Complete for Final Completion
Project Close-Out	Prepare Final Change Order for Outstanding Items
Project Close-Out	Receive and Review Final Payout Request
Project Close-Out	Receive Copies of All Final Lien Waivers
Project Close-Out	Coordinate with Owner, Contractor and Local Municipal Officials for Issue of Certificate
Project Close-Out	Post Construction Review of Project with Owner

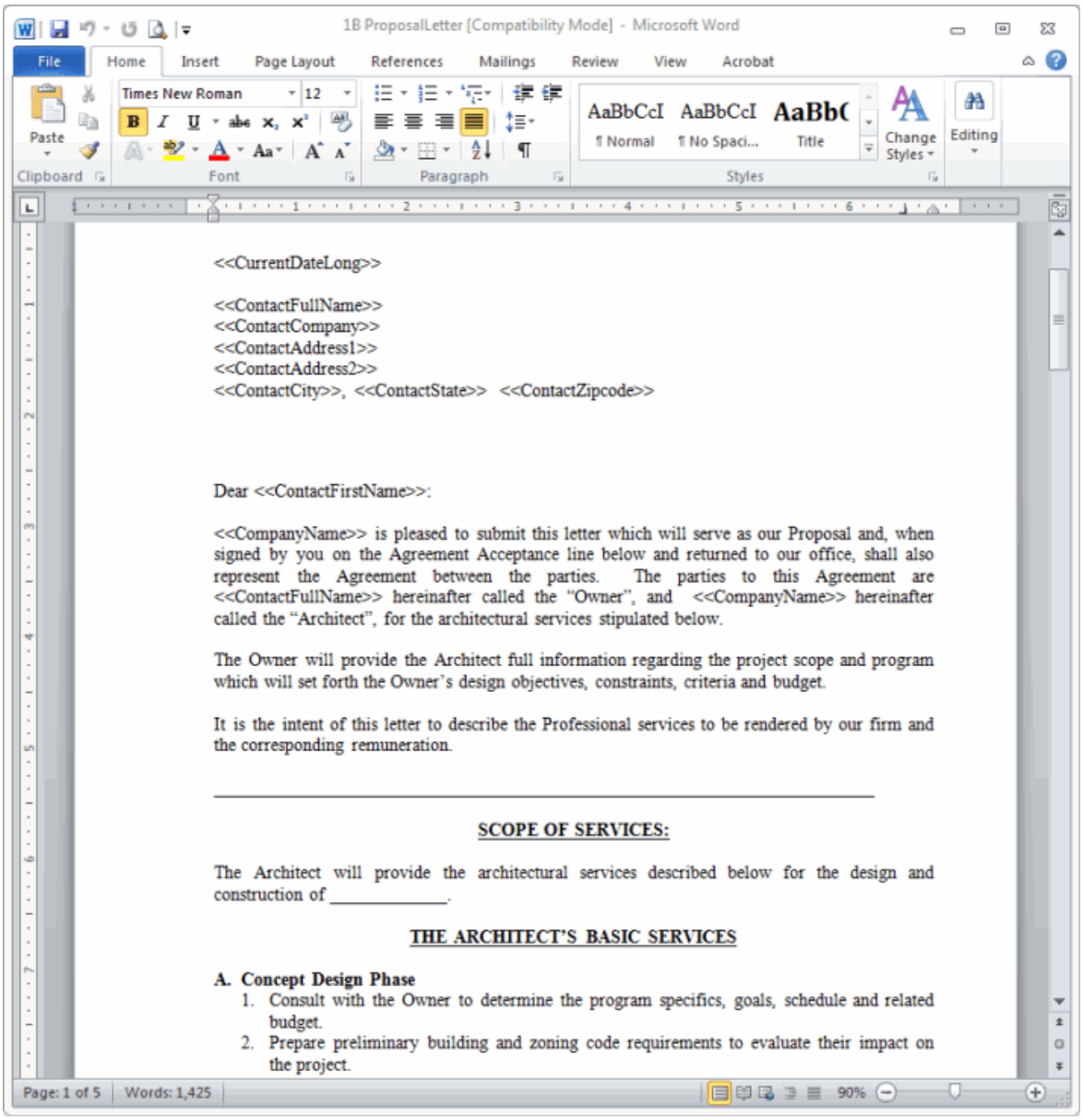
SAMPLE DOCUMENT

ArchiOffice comes with more 70 pre-built Microsoft Word and Excel templates for your common architectural documentation needs.

The templates provided with ArchiOffice can be modified to suit your company unique needs. For example, the font size, font, header size, logo placement, or any of the text, can be changed on the template, so all new documents created from this template adopt these new modifications. This ensures that your corporate identity is preserved (every document is exactly the same as you specify) and that any customized needs can be accommodated.

Your administrator can also add to the library of provided templates, adding your own Word or Excel templates to meet your firm's specific needs. Other templates such as AutoCad, Visio, Microsoft Project, FastTrack, and VectorWorks can be added to the template library, making it easy and efficient for users to create new documents.

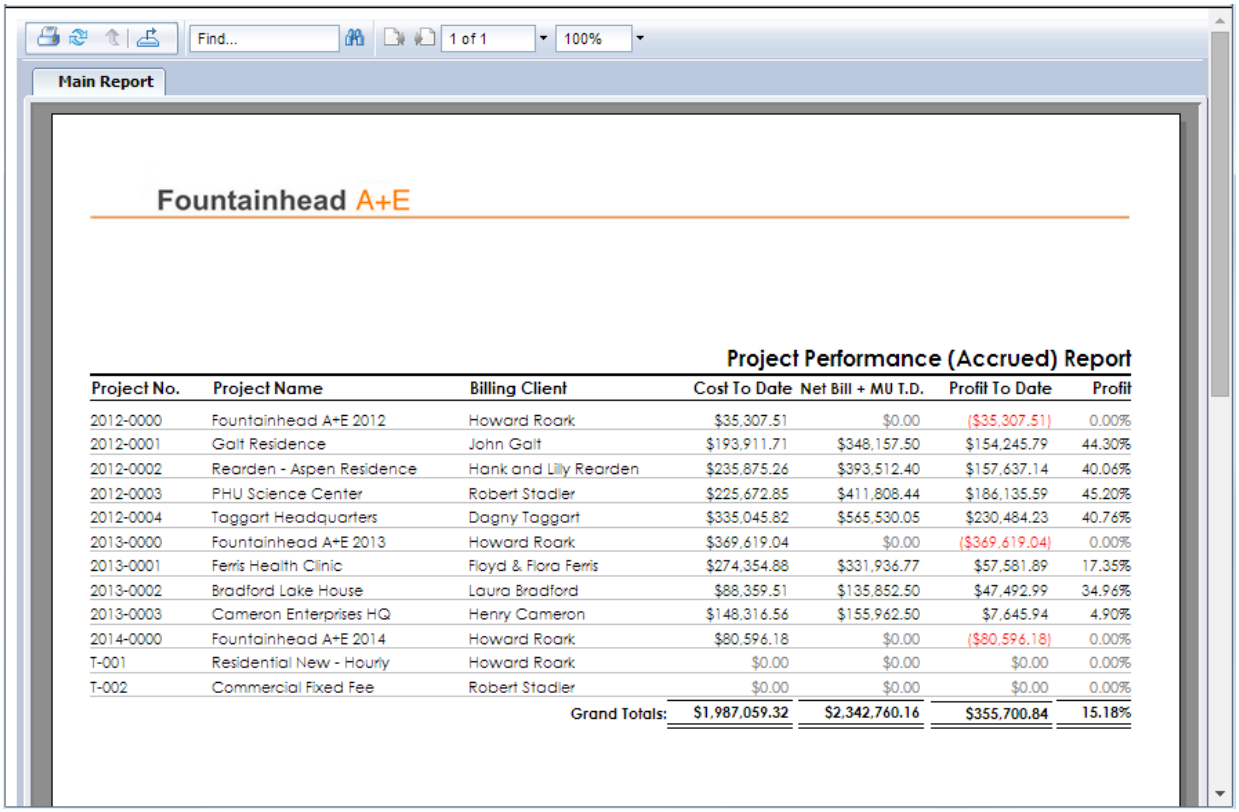
In addition, you can take your existing templates, customize them by adding ArchiOffice fields for merging your contact and project data, and attach them to ArchiOffice, so your employees can continue to use the standard documents in your firm.



SAMPLE REPORT

This is a typical ArchiOffice report. All reports are professionally designed and can be used as documentation for clients or internal meetings. You can define reporting parameters prior to generating a report. Ask your Account Manager for a copy of the ArchiOffice Report Book to view more reports.

The report header and footer images are defined by the administrator and are used on all ArchiOffice reports. The report can be previewed on the screen or printed to any available printer.



Project Performance (Accrued) Report

Project No.	Project Name	Billing Client	Cost To Date	Net Bill + MU T.D.	Profit To Date	Profit
2012-0000	Fountainhead A+E 2012	Howard Roark	$35,307.51	$0.00	($35,307.51)	0.00%
2012-0001	Galt Residence	John Galt	$193,911.71	$348,157.50	$154,245.79	44.30%
2012-0002	Rearden - Aspen Residence	Hank and Lilly Rearden	$235,875.26	$393,512.40	$157,637.14	40.06%
2012-0003	PHU Science Center	Robert Stadler	$225,672.85	$411,808.44	$186,135.59	45.20%
2012-0004	Taggart Headquarters	Dagny Taggart	$335,045.82	$565,530.05	$230,484.23	40.76%
2013-0000	Fountainhead A+E 2013	Howard Roark	$369,619.04	$0.00	($369,619.04)	0.00%
2013-0001	Ferris Health Clinic	Floyd & Flora Ferris	$274,354.88	$331,936.77	$57,581.89	17.35%
2013-0002	Bradford Lake House	Laura Bradford	$88,359.51	$135,852.50	$47,492.99	34.96%
2013-0003	Cameron Enterprises HQ	Henry Cameron	$148,316.56	$155,962.50	$7,645.94	4.90%
2014-0000	Fountainhead A+E 2014	Howard Roark	$80,596.18	$0.00	($80,596.18)	0.00%
T-001	Residential New - Hourly	Howard Roark	$0.00	$0.00	$0.00	0.00%
T-002	Commercial Fixed Fee	Robert Stadler	$0.00	$0.00	$0.00	0.00%
		Grand Totals:	$1,987,059.32	$2,342,760.16	$355,700.84	15.18%

SAMPLE INVOICE

This is an example of an invoice displaying a Stipulated Sum project using one of the available templates. Invoices can be previewed, printed, and finalized.

- Invoices are generated as either a PDF or RTF document. ArchiOffice comes with two templates, Type A and B, to choose from when generating an invoice. If neither of these templates meet your needs, you can have a custom invoice template created for you. Contact our Custom Reports Department at customreports@bqe.com for details.
- Default invoice format for all new projects can be specified in Preferences -Billing-Defaults.
- Invoice Output format for the current project can be specified in the Projects -Billing-Options screen. This allows you to control what the invoice should look like for different projects. For example, you might be invoicing for a different division that requires a different logo or color scheme-Word invoicing only.

The following is an invoice sample in PDF format:

Fountainhead A+E

MONTHLY INVOICE

BILL TO

Ms. Laura Bradford
LBL Financial
33 West Monroe
15th Floor
Chicago, IL 60600

Project Description: Bradford Lake House

INVOICE NUMBER	INVOICE DATE	PAYMENT DUE DATE	OUR PROJECT NO.	BALANCE DUE
BRAD-LH-04	Mar 24, 2015	Apr 19, 2015	14-03	**$23,917.50**

Basic Services

Date	Employee	Code	Description	Hrs	Rate	Extension
03 Design Development						
2/23/2015	DF	Basic Services	Typical Wall Sections	8.00	$100.00	$800.00
2/24/2015	ET	Basic Services	Color & Material Boards	6.00	$150.00	$900.00
2/24/2015	DF	Basic Services	Interior Elevations Key Areas	4.00	$100.00	$400.00
2/24/2015	ET	Basic Services	Typical Reflected Ceiling Plans	2.00	$150.00	$300.00
2/24/2015	DF	Basic Services	Plumbing & Fire Protection Plans	4.00	$100.00	$400.00
2/26/2015	ET	Basic Services	Vertical Circulation Sections	5.00	$150.00	$750.00
2/26/2015	DF	Basic Services	Typical Reflected Ceiling Plans	2.00	$100.00	$200.00
2/26/2015	ET	Basic Services	Typical Reflected Ceiling Plans	3.00	$150.00	$450.00
2/26/2015	ET	Basic Services	Typical Reflected Ceiling Plans	7.00	$150.00	$1,050.00
2/26/2015	DF	Basic Services	Typical Wall Sections	6.00	$100.00	$600.00
2/27/2015	DF	Basic Services	Site and Landscape Plan	5.00	$100.00	$500.00
2/27/2015	ET	Basic Services	Scope Specifications Update	5.50	$150.00	$825.00
3/5/2015	DF	Basic Services	Final Area Calculations	3.00	$100.00	$300.00
3/5/2015	DF	Basic Services	Site and Landscape Plan	5.00	$100.00	$500.00
3/6/2015	DF	Basic Services	Vertical Circulation Sections	5.50	$100.00	$550.00
			03 Design Development Total:	**71.00**		**$8,525.00**
04 Construction Documents						
2/23/2015	PK	Basic Services	Construction Documents Schedule	2.00	$250.00	$500.00
2/23/2015	PK	Basic Services	Prepare Complete Construction Drawings Cartoon / Check Set	3.00	$250.00	$750.00
2/23/2015	GW	Basic Services	Schedule 50% Interim and Final Document Reviews	1.00	$130.00	$130.00
2/23/2015	PK	Basic Services	Construction Documents Staffing Schedule	3.00	$250.00	$750.00
2/23/2015	ET	Basic Services	Partial Floor Plans	5.00	$150.00	$750.00
2/24/2015	HR	Basic Services	Fee Budget	3.00	$250.00	$750.00
2/24/2015	PK	Basic Services	Insurance Instructions from Owner	0.50	$250.00	$125.00
2/24/2015	PK	Basic Services	Bidding Instructions Reviewed with Owner	2.50	$250.00	$625.00
2/24/2015	PK	Basic Services	Prepare Reprographics or Diskettes of Base Sheets for Consultants	3.00	$250.00	$750.00
2/24/2015	PK	Basic Services	All Disciplines Coordinated and Checked	2.00	$250.00	$500.00

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