

Succeed 2017

Best Practices From Our Most Successful Customers



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What We Will Learn

- Customization
- Milestones for Billing
- Tasks for Tracking Employee Budgets
- Template Projects
- Consultant Tracking
- Notes
- To-Dos
- Customer Sharing



Customization

- Triggers
- Reports
- Invoices

Milestones for Billing

- Setting Milestones
- Custom Trigger

Tasks for Tracking Employee Budgets

- Tasks by Employee
- Tasks by Role

Template Projects

- By Scope
- By Client
- By Consultants
- By Rates

Notes

- Tracking Permit Progress
- Tracking Consultant Total Fees
- Note Report

To-Dos

- For Billing Process
- Set Look Ahead

What Have You Had Success with in ArchiOffice?

What We Learned

- How to Use Milestones for Billing
- Using Tasks for Tracking Employee Budgets
- How Template Projects Can Help Build Proper Projects
- How You Can Use Notes to Your Advantage
- How To-Dos Can Help with Billing

Q & A



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