

ArchiOffice Online Getting Started Guide

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INTRODUCTION

Welcome to ArchiOffice Online® from BQE Software!

[ArchiOffice Online](#) is a subscription-based, Software-as-a-Service (SaaS) solution offered by BQE Software. It is a web-based version of [ArchiOffice](#) that is hosted by BQE, providing you with a secure, hassle-free project management solution for architects. It was created by architects, for architects and continues to evolve to meet the needs of a growing customer base worldwide. ArchiOffice Online 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, task and project management, time and expense tracking, billing and reporting. This software program is simple, affordable, secure, scalable, and very fast.

Being a SaaS solution, ArchiOffice Online involves no software installation and your data is stored at our hosted site (called the 'cloud'). In addition, BQE automatically backs up your data.

The goal of this *ArchiOffice Online Getting Started Guide* is to help you get started with the program. It explains the concepts and procedures involved in setting up an ArchiOffice Online account, focusing on its subscription, setup, basic and main functionalities. This Guide enables you to quickly learn how to run and use ArchiOffice Online effectively and efficiently.



The ArchiOffice Online Getting Started Guide is not a complete training solution. It is a guided tour designed to familiarize you with ArchiOffice Online. After completing the guide, please explore the [ArchiOffice Online Help](#). In particular, check out the How Do I help items. Based on your preferred learning style and available time, you can choose self-learning or guided learning. Guided learning provides an expert trainer who helps you get up and running with ArchiOffice Online as quickly as possible. Check out www.bqe.com/Services for more information.



BQE Software offers its Data Migration Services to move data from your local ArchiOffice server to our secured ArchiOffice Online server. For more information, please contact techsupport@ArchiOfficeOnline.com.

ArchiOffice Online Setup Checklist

	Task	Resources and References
Pre-Deployment	Check our system requirements	Hardware Requirements Software Requirements
Start-Up	Set up ArchiOffice Online account	ArchiOffice Online New Account
	Create your online company	ArchiOffice Online Company
	Log into your ArchiOffice Online company	Login
Deployment	Set up your ArchiOffice Online company file and preferences	Setup
	Start using ArchiOffice Online	ArchiOffice Online Help ArchiOffice Online Trainings

SYSTEM REQUIREMENTS

For successful running of the ArchiOffice Online solution, you need an Internet connection and a web-browser. Your computer should meet these basic requirements:

Hardware Requirements

- Any Intel compatible microprocessor (Intel i3 or later recommended)
- 2 GB RAM or more (4 GB recommended)

Software Requirements

- Windows 7 or later, Mac OS 10.0 or later
- Microsoft Edge 20.10240 or later, Microsoft Internet Explorer 10.0 or later, Chrome 30.0 or later, Firefox 30.0 or later, Opera 20.0 or later, Safari 6.0 or later



Be sure to install the latest Windows or Mac service packs and critical updates. Some versions include an Automatic Update option.



If you are experiencing problems with ArchiOffice Online, please check our [Knowledge Base Articles](#). Otherwise, contact us at 310-602-4030 or techsupport@ArchiOfficeOnline.com.

START-UP

Basic start-up procedure for ArchiOffice Online involves these key steps (see below for details):

1. Sign up for an [ArchiOffice Online account](#).
2. Create an [online company file](#).
3. [Log in](#) to ArchiOffice Online.
4. [Navigate](#) ArchiOffice Online.



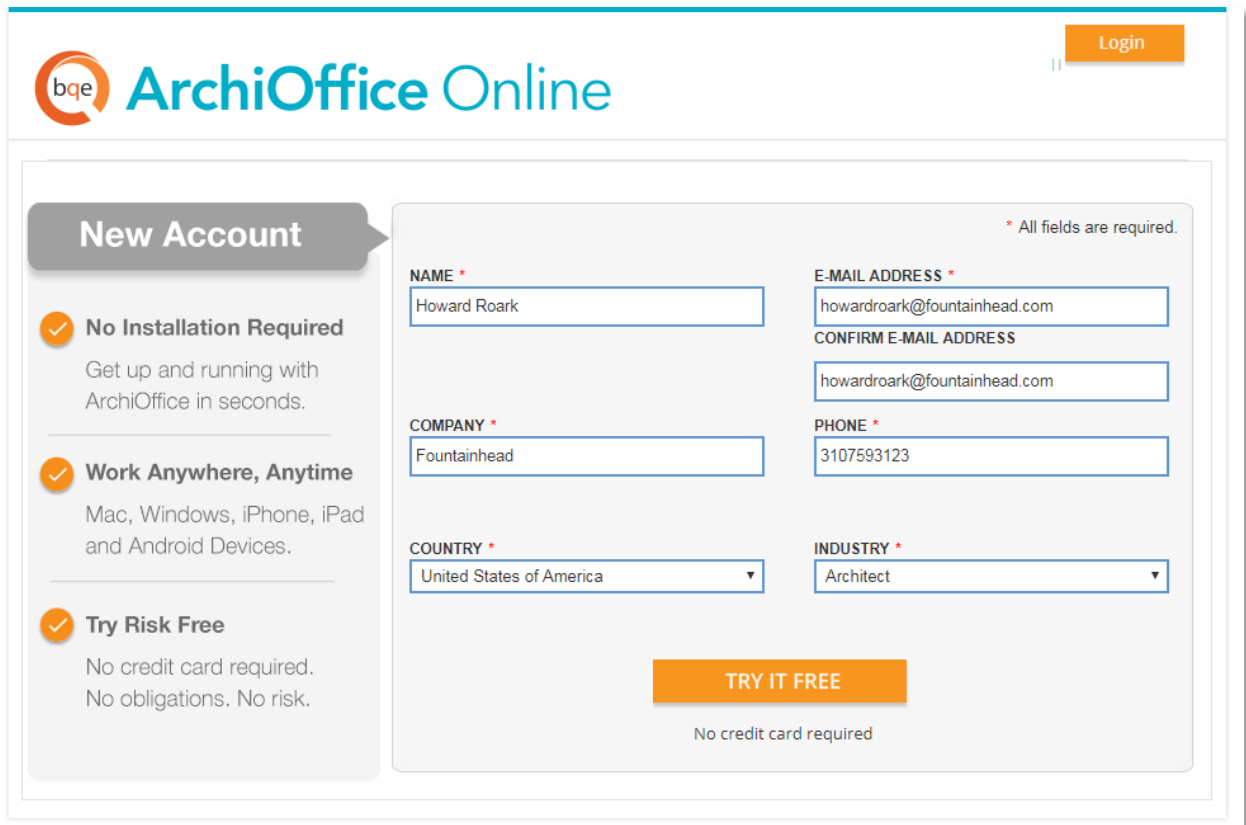
Before subscribing to the software, please read the [Service Level Agreement](#) (SLA).

ARCHIOFFICE ONLINE ACCOUNT

To use ArchiOffice Online, you need to subscribe to it or sign up for a 15-day trial version at www.ArchiOfficeOnline.com. During these 15 days, you can check out the full functionality of ArchiOffice Online, with a new or sample database.


To get started, you have to sign up for an account on the New Account page by clicking on [Free Trial](#). Creating a new account involves creating a new company file. You must provide the required information, including a unique email address. ***Subscription is based on this unique email ID.*** After this, you will receive an email confirming your free trial along with a login ID and temporary password. You have to use these

credentials to validate your account and log into the program. Your email address is marked as the Owner of the company file.



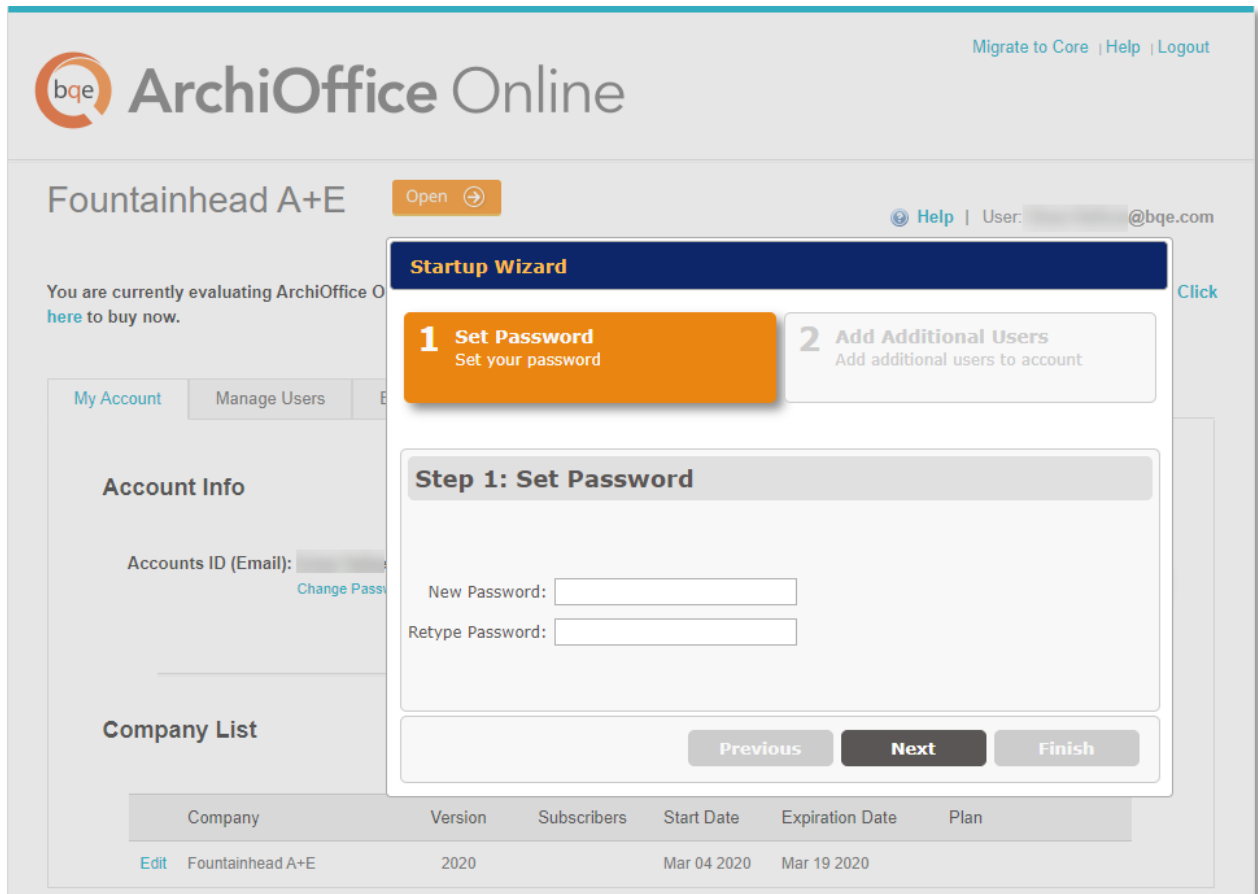
The image shows a screenshot of the ArchiOffice Online registration page. At the top left is the bqe ArchiOffice Online logo. At the top right is a 'Login' button. The main content area is titled 'New Account' and features three bullet points: 'No Installation Required' (Get up and running with ArchiOffice in seconds), 'Work Anywhere, Anytime' (Mac, Windows, iPhone, iPad and Android Devices), and 'Try Risk Free' (No credit card required. No obligations. No risk.). To the right is a registration form with the following fields: NAME (Howard Roark), E-MAIL ADDRESS (howardroark@fountainhead.com), CONFIRM E-MAIL ADDRESS (howardroark@fountainhead.com), COMPANY (Fountainhead), PHONE (3107593123), COUNTRY (United States of America), and INDUSTRY (Architect). A 'TRY IT FREE' button is at the bottom of the form, with the text 'No credit card required' below it. A note at the top right of the form states '* All fields are required.'.

After you log into your ArchiOffice Online account, you have the option to buy the subscription directly instead of using a trial version. You can go to your account's Buy Now tab and purchase the plan you want.

 If you are using Internet Explorer with Google toolbar, you need to turn off the pop-up blocker for Internet Explorer (Tools > Internet Options > Privacy) as well as Google toolbar (Settings next to the Search button).

ArchiOffice Online Company File

ArchiOffice Online displays the Startup Wizard as soon as you validate your account. It prompts you to change the password and add users, if desired. You can create up to 100 named users for your company file during your evaluation period. After subscribing to it, you can purchase more than 100 named users.



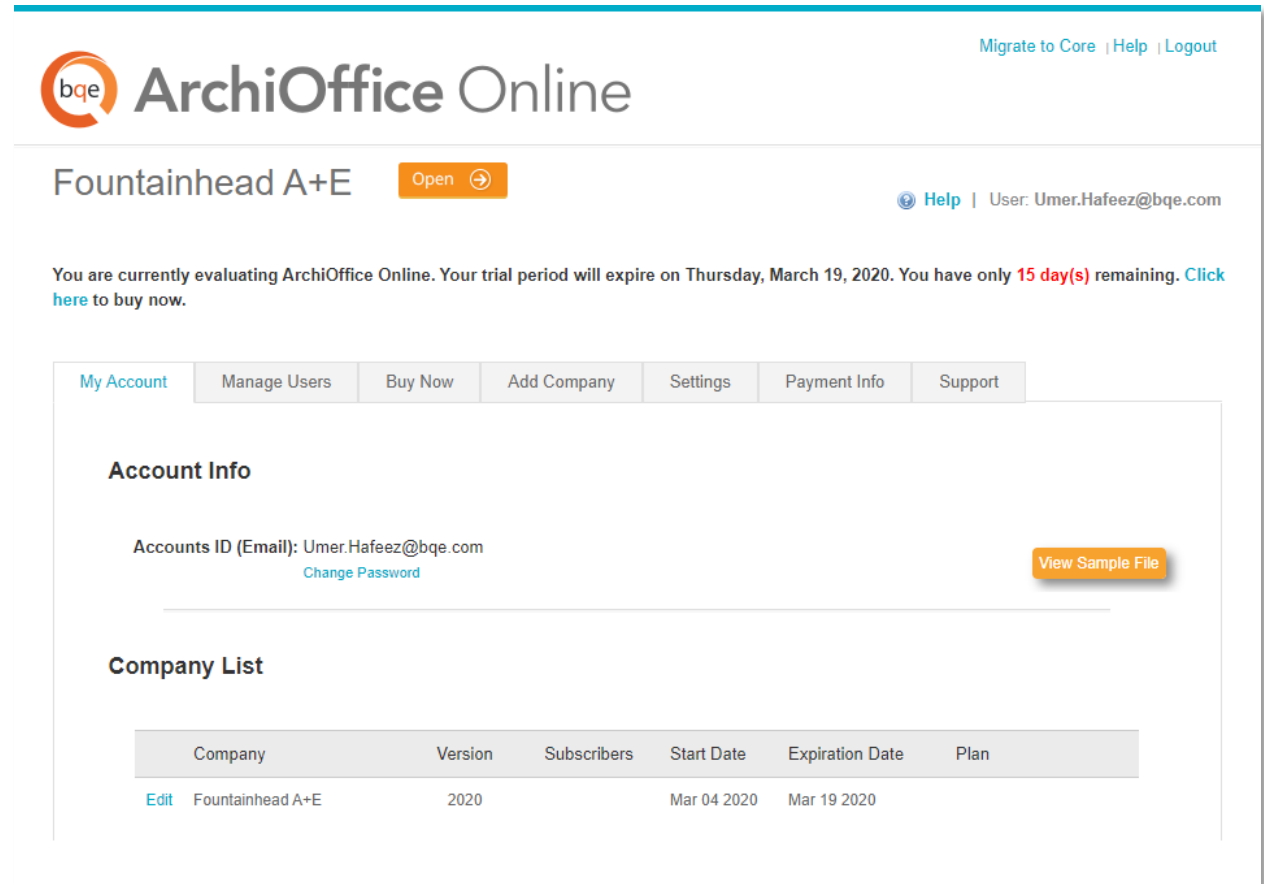
The screenshot shows the ArchiOffice Online interface. At the top, there's a navigation bar with "Migrate to Core | Help | Logout". The main header displays the ArchiOffice Online logo and the company name "Fountainhead A+E". Below the header, there's a "Startup Wizard" modal window. The wizard has two steps: "1 Set Password" (highlighted in orange) and "2 Add Additional Users". The "Set Password" step is active, showing two input fields: "New Password:" and "Retype Password:". Below the input fields are three buttons: "Previous", "Next" (highlighted in black), and "Finish". In the background, the "My Account" tab is visible, showing "Account Info" with "Accounts ID (Email):" and a "Change Password" link, and a "Company List" table.

Company	Version	Subscribers	Start Date	Expiration Date	Plan
Edit Fountainhead A+E	2020		Mar 04 2020	Mar 19 2020	

When you create an account, ArchiOffice Online creates your database using the company name provided by you. If you want to add another company to your ArchiOffice Online account, you can do so from the Add Company tab using the same email address. However, you must purchase separate licenses for users in each company.



If you created multiple databases, you will be prompted to choose the company you want to access before viewing the account details on the My Account tab.



The screenshot shows the ArchiOffice Online user interface. At the top, there is a navigation bar with the ArchiOffice logo and the text 'ArchiOffice Online'. To the right of the logo, there are links for 'Migrate to Core', 'Help', and 'Logout'. Below the navigation bar, the user's account name 'Fountainhead A+E' is displayed, along with an 'Open' button. To the right, there is a 'Help' button and the user's email address 'User: Umer.Hafeez@bqe.com'. A message states: 'You are currently evaluating ArchiOffice Online. Your trial period will expire on Thursday, March 19, 2020. You have only 15 day(s) remaining. Click here to buy now.' Below the message is a navigation menu with tabs: 'My Account', 'Manage Users', 'Buy Now', 'Add Company', 'Settings', 'Payment Info', and 'Support'. The 'My Account' tab is selected, showing 'Account Info' and 'Company List'. Under 'Account Info', the 'Accounts ID (Email)' is 'Umer.Hafeez@bqe.com' with a 'Change Password' link and a 'View Sample File' button. Under 'Company List', there is a table with the following data:

Company	Version	Subscribers	Start Date	Expiration Date	Plan
Edit Fountainhead A+E	2020		Mar 04 2020	Mar 19 2020	

Your email address is marked as the Owner of the company file. When you add new users (Employee), you can set them as an Administrator or a Standard user. By default, an Administrator has full access to ArchiOffice Online. However, you can change these permissions using the Preferences screen within the program. Designating someone as an Administrator or a Standard user does not affect the subscription price.

As an Owner, you will be responsible for the company account, especially adding other users and entering company data. You can enter your company data into ArchiOffice Online in one of the two ways:

- If you have purchased the subscription, have BQE migrate your existing data into the ArchiOffice Online database and upload it for you. *Call your Account Rep for the details.*
- Manually enter data into a fresh company database

The Owner has various privileges to create multiple databases, view account details and manage the overall account. The various options available to the Owner are:

- My Account tab—Manage ArchiOffice Online account

- Manage Users tab—Add ArchiOffice Online users
- Buy Now tab—Purchase subscriptions
- Add Company tab—Add multiple company databases
- Settings tab—Specify options for the online company
- Payment Info tab—View payment history of your online account
- Support tab—[Email Technical Support](#) if there is any problem with your online account

The above options available to a user will differ based on the user type set by the Owner. A Standard user will only be able to view his or her account information (that too limited) while the Administrator will be able to manage the account and view all information with some exceptions.

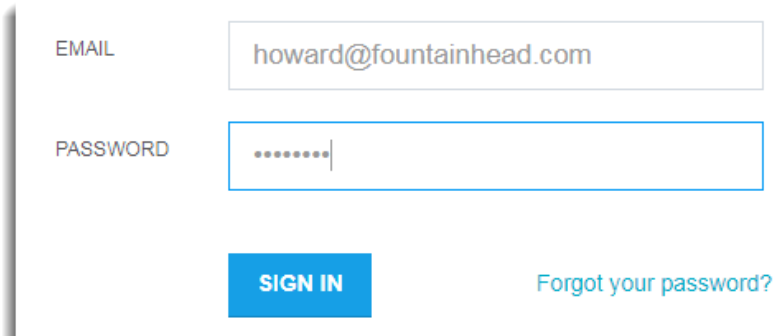
Log-in

You must be an ArchiOffice Online User to log in and use the program. On the [Login](#) page, enter your unique **Email ID** and **Password**.

After creating an ArchiOffice Online account, BQE Software emails you a link to activate your account along with a temporary password to log into the program.

When you log in for the first time as an Owner, you must change your password. After changing it, you should use the new password to access ArchiOffice Online in future. This password can be changed any time from the My Account tab. When you add other users to the online account, they receive activation emails with login instructions.

To start working with ArchiOffice Online, click Open on any of the tabs to open your company database. After doing so, the ArchiOffice Dashboard (home page) displays.



The screenshot shows a login form with two input fields: 'EMAIL' containing 'howard@fountainhead.com' and 'PASSWORD' containing a masked password '.....'. Below the fields is a blue 'SIGN IN' button and a link for 'Forgot your password?'.

ArchiOffice Online Conversion

[Log in to your ArchiOffice Online account](#). If you have an Owner or Administrator account, you will be prompted with the automatic upgrade notification. You just have to click on 'Proceed to Upgrade'. Based on your data file size, it might take from a few minutes up to an hour to complete the upgrade process. You must keep your browser window open until the conversion is complete.

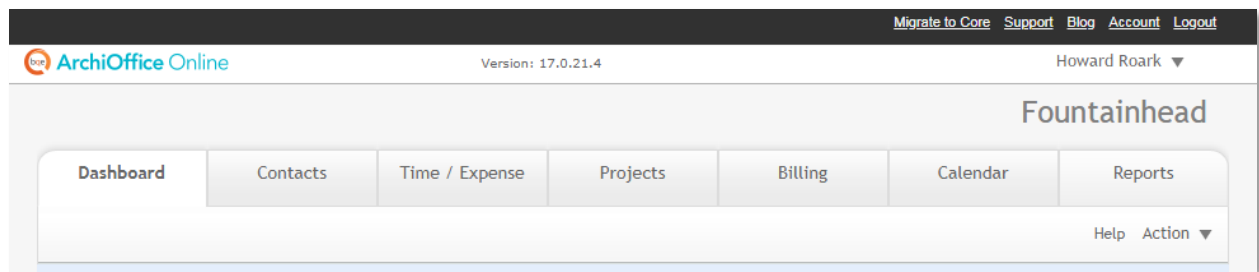
After the conversion is complete, you should verify your data in the latest version of ArchiOffice Online. As a best practice, verify all the list screen data, latest time and expense entries, invoices, and payments. You can also run a few reports to confirm that your data was converted successfully.

Navigation

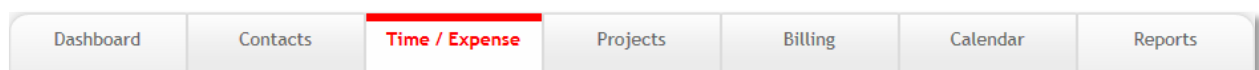
After logging in to ArchiOffice Online and opening your company file, you can access various functions and features of the program using the following navigation options:

Navigation Bar

Above the main navigation bar, ArchiOffice Online provides some links, including your online Account and Logout. You have more options under the drop-down menu at the top right such as Preferences. These options are based on your access privileges.



ArchiOffice Online displays a navigation bar at the top with color-coded tabs that represent a major function or module of the program. Clicking each tab on the navigation bar displays the respective screens. For example, clicking Time/Expense on the navigation bar displays a group of tabbed screens like Time, Expense, etc. You can click on each tab to view or enter data in each screen.

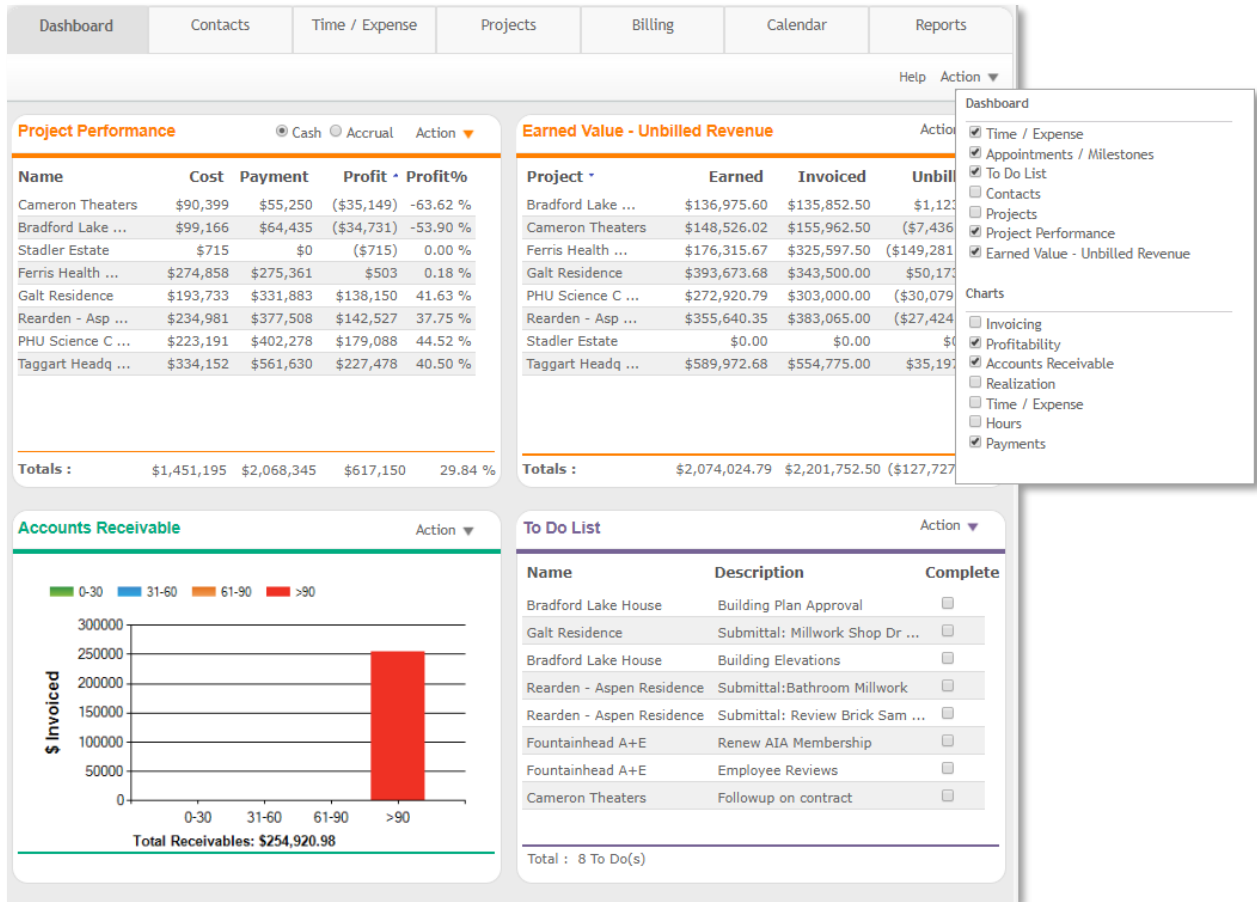


Dashboard

The home page of ArchiOffice Online displays a dashboard with highly useful and customized information, charts, and links. You can access:

- Product-related news
- [ArchiOffice Online Help](#)
- Lists such as Time/Expense, Contacts, Projects, etc.
- Important charts such as Profitability, A/R, Realization, etc.

All this information is customized based on your user profile and privileges. You can choose to expand or collapse each panel by clicking on them and apply filters to the charts.



The dashboard includes several key sections:

- Project Performance:** A table showing project details with columns for Name, Cost, Payment, Profit, and Profit%. Totals: \$1,451,195 Cost, \$2,068,345 Payment, \$617,150 Profit, 29.84% Profit%.
- Earned Value - Unbilled Revenue:** A table showing Earned, Invoiced, and Unbilled Revenue for various projects. Totals: \$2,074,024.79 Earned, \$2,201,752.50 Invoiced, (\$127,727.71) Unbilled.
- Accounts Receivable:** A bar chart showing the distribution of invoices by age. Total Receivables: \$254,920.98.
- To Do List:** A list of tasks with columns for Name, Description, and Complete status. Total: 8 To Do(s).

A settings menu is visible on the right, allowing users to toggle various dashboard components like Time / Expense, Appointments / Milestones, To Do List, and various charts.

ARCHIOFFICE ONLINE BASICS

This section focuses on the initial setup of ArchiOffice Online including the default settings and tutorial.

ArchiOffice Online Setup

At least one person (Administrator) should set up the ArchiOffice Online company. The administrator must review and update the Preferences (explained below). This establishes the default settings for the program.

To access the Preferences screen, select Preferences from the drop-down menu at the top-right corner of the program. You can set up your company defaults, users and other settings from this screen.





It is critical to set up preferences prior to entering any additional information in ArchiOffice Online.

Preferences-System: Enter required information or specify settings for report and invoice logos, system defaults, number formats, printing standards, etc.

Preferences-Work Groups: Establish workgroups and their access permissions (security settings and privileges) for various screens and reports. This saves time by setting permissions on a group basis, rather than for each employee.

Preferences-Users: Enter ArchiOffice Online user profiles and other details such as default rates, addresses, HR items, time and expense options, security settings, and so on. You can also override the user's workgroup security here. You must enter their cost rates (to track the project's profitability) and charge rates (used when employee records time entries against a project) prior to setting up a project. *The DPE and DSE rates are required to establish the value of the time entries only if a project uses the invoice method of Multiple of DPE/DSE.*

Users Make Online login user  

Lic	IName	Status	Group
<input type="checkbox"/>	Catherine ...	Active	Administrators
<input type="checkbox"/>	Dominique ...	Active	Architects
<input type="checkbox"/>	Ellsworth ...	Active	Architects
<input type="checkbox"/>	Gail Wynand	Active	Architects
<input checked="" type="checkbox"/>	Howard Roark	Active	Administrators
<input type="checkbox"/>	Peter Keating	Active	Principals

User Filter

Starts With: And Contains

Status: Active On Leave Terminated

Group:

Contact Details: Work Howard Roark

Go to Contact Assign Contact

Principal

IName: Howard Roark

Title: Principal


Address1: 2601 Airport Drive




Address2: Suite 380


City: Torrance

State: CA Zip: 90505

Country: United States of America

Communications: 

Phone	<input type="text"/> (310) 333-4444	<input type="text"/>		<input type="text"/>
Skype	<input type="text"/> howieroark	<input type="text"/>		<input type="text"/>
Email	<input type="text"/> hr@fharchtest.c	<input type="text"/>		<input type="text"/>

Projects: 

IName	Project Ilo	Active
Alberto	2014-0002	<input checked="" type="checkbox"/>
Bradford Lake House	2013-0002	<input checked="" type="checkbox"/>
Cameron Enterprises HQ	2013-0003	<input checked="" type="checkbox"/>
Commercial Fixed Fee	T-002	<input checked="" type="checkbox"/>

Preferences-Contact: Set the contact defaults and name formats for your ArchiOffice Online contacts.

Preferences-Project: Set the defaults for the projects so that when creating new projects in ArchiOffice Online, users will have consistent numbering, phase and job codes as well as other project management information. You can set the defaults for roles, submittals, milestones, teams, associated tasks, etc. Properly setting up this information will ensure that all new projects in ArchiOffice Online will conform to your company policy and standards. *All this must be entered in its entirety prior to setting up a project.*

Preferences-Billing: The billing setup might require collaboration with your accountant or bookkeeper. Here, you set the defaults for invoice numbering and templates, payment terms, expense markups, account codes, tax models, and billing labels. You can customize the expense types, if needed. *This information must be entered in its entirety prior to setting up a project but can be overridden at the project level.*

Preferences-Web Access: Set your default mapping website and address. The Contacts portal provides links directly from the contact information using the maps you choose here (say Google Maps). This information is used for mapping of contact addresses or driving directions.

Tutorial

This tutorial covers the basic procedures involved in project setup, time tracking, billing, payment, project management and reporting. For details, please refer to the [ArchiOffice Online Help](#).

Contacts

The Contacts screen allows you to create and maintain a profile of your contacts including employees, clients, contractors, consultants, and anyone related to your projects.

To enter contact information:


1. Select the Contacts tab on the navigation bar.
2. The grid displays a list view of your contacts, if any. Select a contact to edit details or click Action > New on the button panel to add a new contact.

Active	Name	Company	Job Title	Correspondence	Type	Amount Owed
<input type="checkbox"/>	Akston, Hugh	Akston Engineering	President	ha@akstonengine ...	Structural Eng ...	\$0.00
<input type="checkbox"/>	Atwood, Calvin	Ground Up Ladscape Arc ...	President	212 1234455	Landscape Arch ...	\$0.00
<input checked="" type="checkbox"/>	Bradford, Laura	LBL Financial	CFO	lbradford@lblfi ...	Developer	\$71,417.50
<input type="checkbox"/>	Brent, Bill	Brent Wood Engineering	Junior Associate	bbrent@brenteng ...	MEP Engineer	\$0.00
<input type="checkbox"/>	Burbank, Carl	Burbank Home Builders		sburbank@kbhome ...	General Contra ...	\$0.00
<input checked="" type="checkbox"/>	Cameron, Henry	Cameron Enterprises	President + CEO	212-322-0987	Client	\$95,712.50
<input checked="" type="checkbox"/>	Ferris, Floyd	State Science Institute	Director of Biolo ...	(998) 777-6666	Client	\$52,361.98
<input checked="" type="checkbox"/>	Galt, John	Taggart Transcontinent ...	Assistant to the ...	(212) 232-3456	Client	\$15,525.00
<input checked="" type="checkbox"/>	Rearden, Henry	Rearden Steelworks	President + CEO	hr@reardensteel ...	Owner	\$16,004.00
<input checked="" type="checkbox"/>	Stadler, Robert	Patrick Henry University	Professor	617 6024010	Client	\$0.00

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

Dashboard	Contacts	Time / Expense	Projects	Billing	Calendar	Reports
Hugh Akston		Previous Next		Save	Help	Action
Name: <input type="text" value="Hugh Akston"/> Company: <input type="text" value="Akston Engineering"/> Title: <input type="text" value="President"/> Type: <input type="text" value="Structural Engineer"/> <input checked="" type="checkbox"/> Active <input type="checkbox"/> Lock <input checked="" type="checkbox"/> Outlook Assign Groups		Work Home Prefix: <input type="text" value="Dr."/> First Name: <input type="text" value="Hugh"/> Last Name: <input type="text" value="Akston"/> Company: <input type="text" value="Akston Engineering"/> Address1: <input type="text" value="656 3rd Avenue"/> Address2: <input type="text" value="Suite 350"/> City: <input type="text" value="New York"/> State: <input type="text" value="NY"/> Zip: <input type="text" value="10035"/> Country: <input type="text"/>		Email: <input type="text" value="ha@akstonengineering"/> Cellular: <input type="text" value="(212) 234-5678"/>		<input checked="" type="checkbox"/> Directory <input type="checkbox"/> Billing <input checked="" type="checkbox"/> Mailing <input checked="" type="checkbox"/> Sync
Documents		Logs		Events		Misc
Notes						
From: <input type="text"/> To: <input type="text"/> By: <input type="text" value="Howard Roark"/> Project: <input type="text"/> Type: <input type="text"/> Action						
Date	Type	Project		Description		
02/14/2018		13-01		Ferris Health Clinic		
Add						
Date	Time	By	Type	Project No	Project Name	Description



You can add more address tabs to this screen by clicking  on the right. 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. Before proceeding to create a project, you must enter the client's contact details (address and phone) first. All projects are built based on the client's contact information.

Projects

The Projects screen allows you to create and maintain a profile of your projects or jobs. When a new billable or RFP project is created, default settings specified in the Preferences screen are automatically applied. If you create a new project from a project template, ArchiOffice Online ignores Preferences and uses the template's settings. Internal projects adopt no settings from Preferences.

1. From the *Contacts* screen, select the client's contact record. In the detail view, select the **Projects** tab below the contact details and select Action > New. You can also select Projects directly on the navigation bar and select Action > New in the list view.
2. It prompts you to enter the required information such as 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.

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

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

Dashboard
Contacts
Time / Expense
Projects
Billing
Calendar
Reports

13-01:Ferris Health Clinic
Active only
Previous Next Save Help Action ▼

Details

General

Logs

Events

Tasks

Time/Expense

Billing

Project Number

Project Name

Project Type

Business Unit

Project Status

Type Billable RFP Internal

URL

Project Address

Address1 Use Billing Client Address

Address2

City

State Zip:

Country

Key People

Billing Client Reassign Principal

Originator Project Leader

Project Team

Phases / Codes

	Employee	Role	Bill Rate	Approve T/E	Active	
	Howard Roark	Principal	\$250.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Peter Keating	Project Architect	\$200.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Ellsworth Toohey	Architect	\$150.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	Gail Wynand	Architect Intern	\$135.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
	Dominique Francon	Drafter	\$115.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

◀◀
0
▶▶

Record: 0 of 1 - Total 1

- Now, click on the Billing tab and select Options from the drop-down list on the left to set the project's Invoice Method. This is important prior to entering the project's budget.

Dashboard Contacts Time / Expense **Projects** Billing Calendar Reports

13-02:Rearden - Aspen Residence Q Active only Previous Next Help Action ▼

Details General Logs Events Tasks Time/Expense **Billing**

Options ▼

Invoice Method: Stipulated Sum Amount: \$375,000.00 Action ▼

Phase	Budget		Actual			Invoiced			All	
	%	Stipulated	%	Fees + NR Exp	Past %	Past \$	Current %	Current \$		Remaining
02 Schematic Design	17.16 %	\$75,000.00	102.84 %	\$77,126.25	100.00 %	\$75,000.00	0.00 %	\$0.00	\$0.00	<input checked="" type="checkbox"/>
03 Design Development	21.45 %	\$93,750.00	96.47 %	\$90,442.35	100.00 %	\$93,750.00	0.00 %	\$0.00	\$0.00	<input checked="" type="checkbox"/>
04 Construction Do ...	34.32 %	\$150,000.00	98.36 %	\$147,535.00	100.00 %	\$150,000.00	0.00 %	\$0.00	\$0.00	<input checked="" type="checkbox"/>
05 Construction Pr ...	4.29 %	\$18,750.00	62.48 %	\$11,715.00	100.00 %	\$18,750.00	0.00 %	\$0.00	\$0.00	<input checked="" type="checkbox"/>
▼ 07 Consultants	8.58 %	\$37,500.00	60.00 %	\$22,500.00	75.00 %	\$28,125.00	92.67 %	\$6,625.00	\$2,750.00	<input checked="" type="checkbox"/>
MEP Engineering	2.57 %	\$11,250.00	22.22 %	\$2,500.00	75.00 %	\$8,437.50	100.00 %	\$2,812.50	\$0.00	<input checked="" type="checkbox"/>
Structural Engin ...	4.29 %	\$18,750.00	53.33 %	\$10,000.00	75.00 %	\$14,062.50	90.00 %	\$2,812.50	\$1,875.00	<input checked="" type="checkbox"/>
Civil Engineering	1.72 %	\$7,500.00	133.33 %	\$10,000.00	75.00 %	\$5,625.00	88.33 %	\$1,000.00	\$875.00	<input checked="" type="checkbox"/>
Totals:	85.81 %	\$375,000.00	93.15 %	\$349,318.60	97.50 %	\$365,625.00	1.77 %	\$6,625.00	\$2,750.00	

- Next, on the same Billing tab, select Budget from the drop-down list where the phases (sub-phases) and job codes (sub-job codes) have already been set. Enter the fees and hours budgeted for each phase. This will coincide with the information stipulated in your contract.



It is imperative that budgets are set for ALL projects, whether 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. Though hourly projects do not necessarily need a budget, it is important for you to estimate your fees and time that you will be spending 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 their time and expenses on it.

Time and Expenses

The Time/Expense screen is used for entering time and expenses in ArchiOffice Online. The screen also displays the existing time and expenses in the system.

- Select the Time/Expense tab on the navigation bar.
- On the *Time* tab, select the desired Employee from the drop-down list (your login name is pre-selected by default).

Dashboard Contacts **Time / Expense** Projects Billing Calendar Reports

Print Help Action ▼



Time Expense Detail Filter

Employee: **Howard Roark** Me Week Beginning: **Mon, 2 Mar, 2020** ⏪ ⏩

	TOTALS	Monday 03/02/2020	Tuesday 03/03/2020	Wednesday 03/04/2020	Thursday 03/05/2020	Friday 03/06/2020	Saturday 03/07/2020	Sunday 03/08/2020
Hours Chargeable	-	-	-	-	-	-	-	-
Hours Non-Chargeable	-	-	-	-	-	-	-	-
Hours Internal	-	-	-	-	-	-	-	-
Hours Entered	-	-	-	-	-	-	-	-
Hours Required	40	8	8	8	8	8	-	-
Hours Remaining	-	8	8	-	8	8	-	-
Realization	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%

Howard Roark

Date	Project	Phase (0%)	Job Code	Task/Description	Chg	Hours
03/04/2020	Fountainhead A+E	Administration	Office		<input type="checkbox"/>	<input type="text" value=""/>
03/04/2020	Fountainhead A+E	Administration	Office		<input type="checkbox"/>	<input type="text" value=""/>
03/04/2020	Fountainhead A+E	Paid Time Off	Vacation		<input type="checkbox"/>	<input type="text" value=""/>

- ArchiOffice Online auto sets the time card to the current date (highlighted in yellow). If you want to enter time for another day, just click that day on the grid and then enter time in Hours along with other required information such as Project, Phase, Job Code, and Task/Description in the area below the grid.
- Specify whether the time entry is chargeable or not by checking or un-checking the Charge option. By default, all time is chargeable.
- Click  to add and save the time entry.
- Similarly, on the *Expense* tab, pick a date on the grid and then enter the required information such as Project, Expense Type, Description, etc.
- Specify whether the expense entry is non-reimbursable (NR) by the client or reimbursable (ER) to the employee by checking the relevant option.
- Enter the Quantity and Cost of the expense.
- Click  to add and save the expense entry.

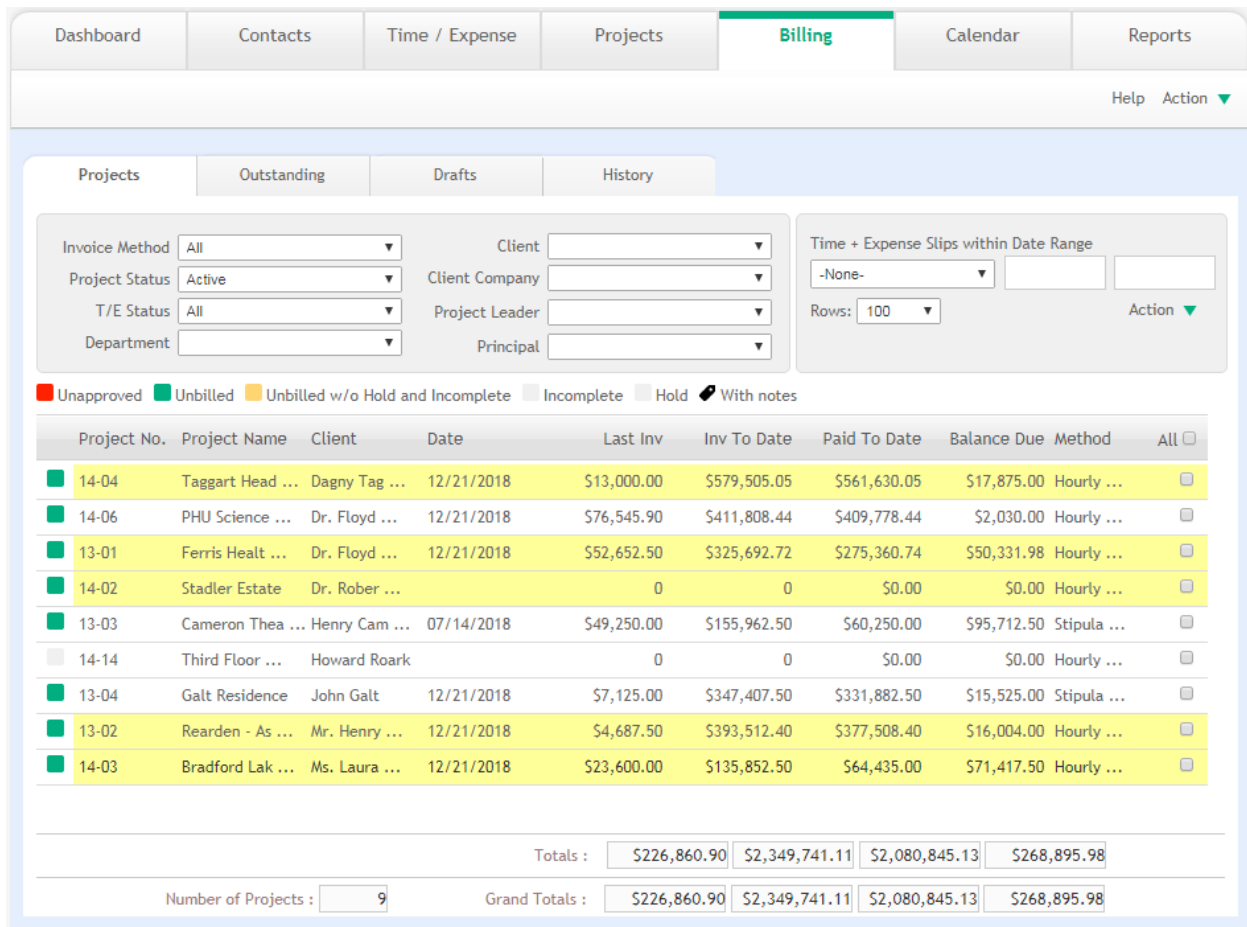


If you prefer, both time and expenses can be entered on the Detail tab. Here, you have the option of

using a timer to track your time, place an entry on hold, enter notes, and so on.

ArchiOffice Online provides several options for generating invoices and applying payments. For a selected project, you can generate invoices using the Projects > Billing > Invoices and Projects > Billing > Options screen. The Options screen also allows you to set the billing defaults and options used for generating invoices for a project.

Alternatively, you can batch bill projects directly from the Billing screen. You can also view outstanding, draft and historical invoices from here, and apply payments to outstanding invoices.



The screenshot shows the ArchiOffice Billing interface. At the top, there is a navigation menu with tabs for Dashboard, Contacts, Time / Expense, Projects, Billing (selected), Calendar, and Reports. Below the menu is a sub-menu with tabs for Projects, Outstanding, Drafts, and History. The main area contains filter options for Invoice Method, Project Status, T/E Status, Department, Client, Client Company, Project Leader, and Principal. There is also a section for 'Time + Expense Slips within Date Range' with a dropdown menu and a date range input. Below the filters is a legend for invoice statuses: Unapproved (red), Unbilled (green), Unbilled w/o Hold and Incomplete (orange), Incomplete (grey), Hold (light blue), and With notes (black). The main table displays a list of invoices with columns for Project No., Project Name, Client, Date, Last Inv, Inv To Date, Paid To Date, Balance Due, Method, and an 'All' checkbox. The table is filtered to show 9 projects. At the bottom, there are summary statistics for Totals and Grand Totals, including the number of projects (9).

Project No.	Project Name	Client	Date	Last Inv	Inv To Date	Paid To Date	Balance Due	Method	All
14-04	Taggart Head ...	Dagny Tag ...	12/21/2018	\$13,000.00	\$579,505.05	\$561,630.05	\$17,875.00	Hourly ...	<input type="checkbox"/>
14-06	PHU Science ...	Dr. Floyd ...	12/21/2018	\$76,545.90	\$411,808.44	\$409,778.44	\$2,030.00	Hourly ...	<input type="checkbox"/>
13-01	Ferris Healt ...	Dr. Floyd ...	12/21/2018	\$52,652.50	\$325,692.72	\$275,360.74	\$50,331.98	Hourly ...	<input type="checkbox"/>
14-02	Stadler Estate	Dr. Rober ...		0	0	\$0.00	\$0.00	Hourly ...	<input type="checkbox"/>
13-03	Cameron Thea ...	Henry Cam ...	07/14/2018	\$49,250.00	\$155,962.50	\$60,250.00	\$95,712.50	Stipula ...	<input type="checkbox"/>
14-14	Third Floor ...	Howard Roark		0	0	\$0.00	\$0.00	Hourly ...	<input type="checkbox"/>
13-04	Galt Residence	John Galt	12/21/2018	\$7,125.00	\$347,407.50	\$331,882.50	\$15,525.00	Stipula ...	<input type="checkbox"/>
13-02	Rearden - As ...	Mr. Henry ...	12/21/2018	\$4,687.50	\$393,512.40	\$377,508.40	\$16,004.00	Hourly ...	<input type="checkbox"/>
14-03	Bradford Lak ...	Ms. Laura ...	12/21/2018	\$23,600.00	\$135,852.50	\$64,435.00	\$71,417.50	Hourly ...	<input type="checkbox"/>

Totals : \$226,860.90 \$2,349,741.11 \$2,080,845.13 \$268,895.98

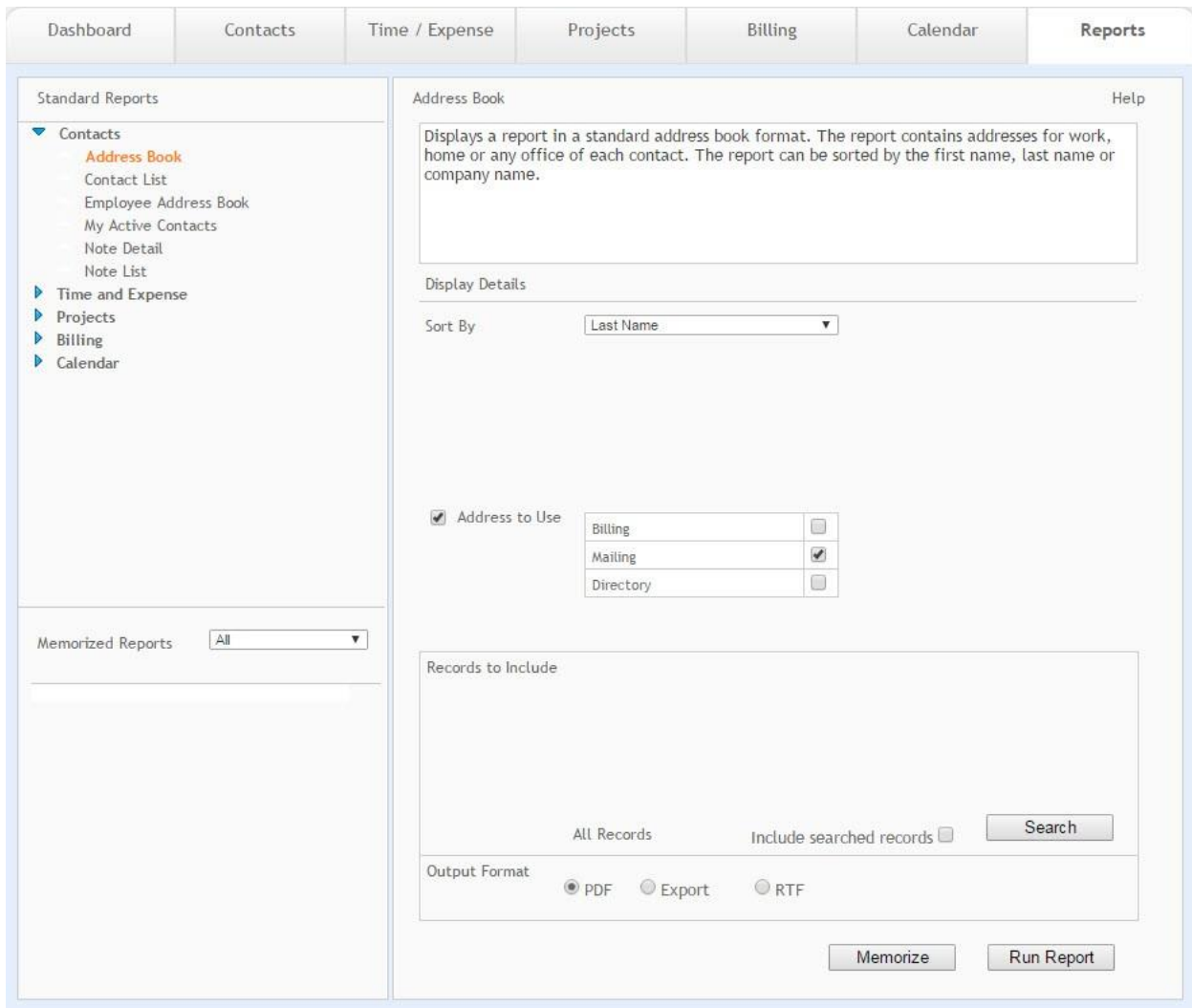
Number of Projects : 9 Grand Totals : \$226,860.90 \$2,349,741.11 \$2,080,845.13 \$268,895.98

Payments can be recorded for the individual projects using the Projects screen. If you prefer to enter the payment in a batch mode, you can do so from the Billing screen. *Please see the [ArchiOffice Online Help](#) for more information.*

Reports

The Reports screen allows you to 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, and see how each would best represent your data. After you have set the report filters and criteria properly, memorize the report for future use to save time and effort.

1. Select the Reports tab from the navigation bar.



The screenshot shows the ArchiOffice Reports interface. At the top, there is a navigation bar with tabs for Dashboard, Contacts, Time / Expense, Projects, Billing, Calendar, and Reports. The Reports tab is selected. On the left, there is a 'Standard Reports' list with categories: Contacts (Address Book, Contact List, Employee Address Book, My Active Contacts, Note Detail, Note List), Time and Expense, Projects, Billing, and Calendar. Below this is a 'Memorized Reports' section with a dropdown menu set to 'All'. The main area displays the 'Address Book' report configuration. It includes a description: 'Displays a report in a standard address book format. The report contains addresses for work, home or any office of each contact. The report can be sorted by the first name, last name or company name.' Below the description is a 'Display Details' section with a 'Sort By' dropdown menu set to 'Last Name'. There is a checked checkbox for 'Address to Use' with a table of options: Billing (unchecked), Mailing (checked), and Directory (unchecked). Below this is a 'Records to Include' section with a 'Search' button and an 'Include searched records' checkbox. At the bottom, there is an 'Output Format' section with radio buttons for PDF (selected), Export, and RTF. Finally, there are 'Memorize' and 'Run Report' buttons at the bottom right.

2. Then choose the desired 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 building the report settings, click Run Report to view it.

- After applying filters on the report, click Memorize to save it as a custom report, if desired.

Project Management

ArchiOffice Online offers many ways to measure the efficiency of your projects. The following features can provide useful information to review your projects and track their progress.

Projects Summary

Projects-Billing-Summary screen: This view allows you to measure the efficiency of a project by comparing its budgeted, actual and invoiced amounts. This information is updated in real time and represents the status of your project.

13-03:Cameron Theaters												
Dashboard		Contacts		Time / Expense		Projects		Billing		Calendar		Reports
Active only <input checked="" type="checkbox"/>							Previous		Next		Help Action	
Details		General		Logs		Events		Tasks		Time/Expense		Billing
Summary												
Billing Client		Henry Cameron										
											Hours <input checked="" type="radio"/> \$/Hours <input type="radio"/>	
Basic Services	Budget				Actual			Invoiced				
	%	Hrs	Fee+HIR Exp	Hr Fee	%	Hrs	Fee+HIR Exp	%	Fee+HIR Exp	Hr Fee	Remain	
01 Pre-Design	3 %	0	\$0	\$15,000	96 %	79	\$14,463	96 %	0	\$14,463	\$538	
02 Schematic Design	21 %	649	\$120,000	\$0	81 %	550	\$96,683	70 %	\$84,000	0	\$36,000	
03 Design Development	24 %	933	\$140,000	\$0	25 %	197	\$34,615	25 %	\$35,000	0	\$105,000	
04 Construction Documents	39 %	1667	\$225,000	\$0	0 %	0	\$0	10 %	\$22,500	0	\$202,500	
06 Contract Administration	14 %	0	\$0	\$80,000	0 %	0	\$0	0 %	0	\$0	\$80,000	
Totals	100 %	3249	\$485,000	\$95,000	25 %	826	\$145,761	27 %	\$141,500	\$14,463	\$424,038	
Hours <input checked="" type="radio"/> \$/Hours <input type="radio"/>												
Additional Services	Budget				Actual			Invoiced				
	%	Hrs	Fee+HIR Exp	Hr Fee	%	Hrs	Fee+HIR Exp	%	Fee+HIR Exp	Hr Fee	Remain	
Construction Management		83	\$12,500		0 %		\$0	0 %	0		\$12,500	
Totals		83	\$12,500		0 %	0	\$0	0 %	\$0		\$12,500	
ALL SERVICES TOTAL:												
	100 %	3,332	\$497,500	\$95,000	25 %	826	\$145,761	26 %	\$141,500	\$14,463	\$436,538	

Project Profitability

Projects-Billing-Performance screen: This view displays the most pertinent information relating to your project's profitability. Here you will see the Total Cost to Date, Total Payment Received, and so on, which

then reflects your actual profitability. In addition, this view provides a breakdown of the budgeted time on a project compared to the actual hours spent, as well as the cost for each project phase.

Dashboard
Contacts
Time / Expense
Projects
Billing
Calendar
Reports

14-03:Bradford Lake House
Active only
Previous Next
Help Action ▼

Details
General
Logs
Events
Tasks
Time/Expense
Billing

Performance ▼

Project No.	14-03
Project Name:	Bradford Lake House
Billing Client:	Ms. Laura Bradford
Total Cost to Date:	\$99,165.94
Total Payment Received:	\$64,435.00
Total Cash Profit to Date:	(\$34,730.94)
Profit:	-53.9%

View Accrued Cash

Refresh

Basic Services	Key: (Green) Hours to Date, (Orange) Total hours budgeted, (Red)hours over budget			Cost to Date	Billed to Date	Total to be Billed
01 Pre-Design	63	50	13	\$5,336.26	\$8,915.00	\$1,085.00
02 Schematic Design	368	446		\$39,493.54	\$58,670.00	\$3,830.00
03 Design Development	314	375		\$37,810.63	\$48,375.00	\$14,125.00
04 Construction Do ...	110	500		\$13,875.92	\$19,892.50	\$55,107.50
06 Contract Admini ...		270		0	\$0.00	\$40,000.00
Totals				\$96,516.34	\$135,852.50	\$114,147.50

Additional Services	Key: (Green) Hours to Date, (Orange) Total hours budgeted, (Red)hours over budget			Cost to Date	Billed to Date	Total to be Billed
Boat House and Dock	16	40		\$2,649.60	\$0.00	\$6,000.00

Congratulations! You have now successfully set up ArchiOffice Online and understood its basic functionality. To learn more about this program, check the [ArchiOffice Online Help](#) or visit www.archiofficeonline.com.

If you have any trouble in using ArchiOffice Online, please contact ArchiOffice Support at 310-602-4030 or techsupport@ArchiOfficeOnline.com. For technical issues, check our [Knowledge Base](#). For other questions, please call us at (888) 245-5669 (US and Canada) or (310) 602-4020; or email sales@ArchiOffice.com.



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