What's New in ArchiOffice 2011 Webinar: Questions and Answers

Question: What is the migration like from AOv8 to AO2011 on the Mac? Is it even possible?

Answer: The ArchiOffice 2011 installer will migrate data from ArchiOffice v8. In order to do this, you must be using version 8.9.6. To learn more about how the process works, click here and search for "Upgrade v8".

Question: Does the "Description" field in the timecard have the auto-fill ability?

Answer: ArchiOffice does not provide the ability to create auto-fill based on abbreviations. However, there are 3rd party utilities that you can use which allow you to program codes which can then be used to auto-fill.

Question: Can ArchiOffice track budgets for expenses and consultants? Billed vs. Remaining?

Answer: If consultant fees are part of a stipulated sum agreement there are generally two preferred methods for tracking them. The first is to create sub-phases for each of your typical phases. For example, you might have a main phase called "Schematic Design" and underneath it are sub-phases such as "Architectural Services," "Civil Engineering," "Structural Engineering," etc. With the "Architectural Services" sub-phase you can budget the hours and fees. For the Engineering consultant sub-phases, you don't need to budget hours since they are not being used by your employees, but you will budget the fees you expect to pay your engineer during the phase.

Some firms find it tedious to break out their consultant fees across multiple phases since it isn't easy to total them all up and see how much the total budget is for "Structural Engineering." In a situation like that, it's generally easier to create a phase called "Outside Consultants" and beneath that have the sub-phases (i.e. "Structural Engineering").

A similar method can be used for expenses if you have a contract that provides you with a fixed fee for expenses. Create a main phase called "Expenses" and sub-phases called "Travel," "Printing," etc.

Once you've set up your consultants (and/or expenses), you can track them in the Project>Billing>Summary screen. Anytime you receive an invoice from your consultant, it should be known by ArchiOffice as "non-reimbursable." This way, the amount can be compared to the budget and you can invoice your client easily. The same holds true for expenses. Mark them as non-reimbursable (I know that sounds counter-intuitive), and you will see the actual amounts in the Projects>Billing>Summary screen compared to the Budgeted amounts. This makes it easy for you to decide how much to bill the client (done from the Project>Billing>Invoices screen).

Question: Can ArchiOffice 2011 create a Project Slip Report as in ArchiOffice v8?

Answer: Yes. ArchiOffice 2011 not only includes every report found in ArchiOffice v8, but we've added some new ones. In addition, you can create your own custom reports or ask our Custom Reports Team to create a custom report for your firm by providing us a mock-up or sample of the report you are looking for. Our team will then provide you with a quote to produce the report. Custom report requests can be emailed to customreports@bqe.com.

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Question: Can we create an Accounts Receivable report with a date range?

Answer: When ArchiOffice produces an Accounts Receivable report it cannot be restricted to a date range. Instead, it will examine all outstanding invoices and allow you to sort by Client, Project Type, Project Principal and Project Name (or Number).

Question: Can we set invoice preferences to bill Basic Services and Additional Services on separate invoices without having to put the Additional Services on hold while creating the Basic Services invoice?

Answer: If you frequently need to produce invoices that are restricted to either Basic or Additional Services but not both, there are two options. First, consider making them unique projects. If, however, that is not practical, you can request that we create two custom invoices for your firm. One custom invoice can be restricted to Basic Services and the other can be restricted to Additional Services. Please contact our Custom Reports Team at customreports@bqe.com for more information.

Question: Can we add submittals to the log that haven't been created by ArchiOffice?

Answer: ArchiOffice has a submittals tracking system found either in the Projects>Logs>Submittals screen or the Contacts>Logs>Submittals screen. Generally speaking, architects don't create the submittals. To record a new submittal that you have received from the General Contractor, simply click the NEW button.

Question: Can you talk about exporting to QuickBooks?

Answer: ArchiOffice 2011 includes a utility that provides bi-directional integration with QuickBooks (PC only). To learn more about how the process works, please refer to our ArchiOffice QuickBooks Integration Guide.

If you would like assistance to help you match existing QuickBooks customers with your ArchiOffice Projects, please contact your ArchiOffice Account Manager.

Question: Does ArchiOffice 2011 integrate with QuickBooks Premium? If so, do you need to input vendor invoices twice, one for each software or is it truly integrated?

Answer: Yes, ArchiOffice integrates with QuickBooks Premium. You do not need to enter vendor invoices twice. If you enter invoices into QuickBooks and assign them to a customer and job, they will be transferred to ArchiOffice, so double entry is not required. Please read the ArchiOffice QuickBooks Integration Guide to learn more.

Question: Does the export on the report module export correctly to Excel?

Answer: Yes. However, if you are exporting a report that displays summary data, understand that the underlying information is exported as well and you will need to modify the Excel document to summarize the information.

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Question: Have you developed a current ArchiOffice 2011 User Manual?

Answer: Yes. ArchiOffice 2011 User Manual can be found by clicking here.

Question: Have you updated the billing filters?

Answer: In the Billing Module, you can filter out the viewed data by Client, Principal, Invoice Method and Invoice Dates. You can also restrict the view to Project Status as Active, InActive, Cancelled or Completed. Finally, you can restrict the view to All Projects, Projects with Unapproved Slips, Projects with Unbilled Slips, and Projects with Slips on Hold.

Question: How do Reimbursable Expenses impact the Project QuickView screen?

Answer: Both reimbursable and non-reimbursable expenses will have their costs included in the Total Cost to Date field. Since the Total Net Billings + Markup to Date (Accrued) and Total Payments Received (Cash) reflect invoicing or payment for reimbursable expenses, it's important to have their costs included.

Question: How can we bill one phase as a fixed fee and another phase as a percentage of construction without making two different projects?

Answer: In ArchiOffice 2011, you can accomplish this by using the Stipulated Sum Invoice method and manually keeping track of the value of the phase that is related to construction cost. Once you know this amount, you would fill that number in the budget field. If it changes over time, you'll need to track that separately and update the value in ArchiOffice.

Question: When will we be able to sync with Google Calendar and Contacts and Gmail?

Answer: In ArchiOffice 2011, you will not be able to do this directly. However, you can set up your Outlook, Apple Mail, iCal or Entourage client to access your Google Calendar, Contacts and Gmail and then sync with ArchiOffice.

Question: When will we be allowed to search by just entering in our search criteria and hitting the Return or Enter key? It's inconvenient to hit the Search button.

Answer: Since the ArchiOffice Search screens include dropdown fields which can be typed ahead, the Enter key is used to accept the currently highlighted item in the dropdown. This is why the Enter key cannot be used as a way to complete and execute the search.

Question: Outlook Syncing in AO2011 is not working for me. What's wrong?

Answer: Please contact support@archioffice.com and provide them with more details to find out why you are not able to sync properly.

Question: When will ArchiOffice 2011 be available?

Answer: ArchiOffice 2011 was released in July 2011. Please contact your ArchiOffice Account Manager to find out more.

What's New in ArchiOffice 2011 Webinar: Questions and Answers Cont.

Question: Can you generate a report for Project Addresses in AO2011?

Answer: If there is a report you would like that is not provided by default, you can create them yourself with the free iReport Writer from JasperSoft or provide a mock-up sample of the report to our Custom Reports Team and they will provide you with a quote to produce it. Custom reports are generally fast, easy and affordable when you have our team create them. Custom report requests can be emailed to customreports@bqe.com.

Question: What is the upgrade cost from version 8.8.01 to ArchiOffice 2011 for one user?

Answer: Please contact your ArchiOffice Account Manager or call 855-687-1028 to find out what it will cost for your firm to upgrade.

Question: How can we move Checklist Tasks from one phase to another?

Answer: Currently, there is no way for you to do this. If you have many tasks that you would like to move to a different please contact support@archioffice.com to request a service to have our developers handle this for you.

Question: Is there a plan to sync with Thunderbird?

Answer: No. Currently we sync with Outlook (PC only), Apple Mail and Entourage. There are no plans to create a sync tool with Thunderbird. However, you can have a 3rd party create the sync utility for your firm. Otherwise, you might consider using one of the mail clients we do sync with on a single computer and use it for archiving only.

Question: Is there a way to do a batch change so the Work tab in the Contact screen is selected as the Directory address?

Answer: Please contact support@archioffice.com and tell them what you are trying to achieve. They can most likely do this for you over the Internet.

Question: I noticed the "X" is gone. So how can we close ArchiOffice 2011?

Answer: The "X" is on the far-right of the Home screen. But you can also quit out of ArchiOffice 2011 by using the File pull-down menu and selecting Exit. It will also quit if you click the Close box that is part of the window border.

Question: I have a payment from a single client for multiple invoices. Can I apply the amount at one time to multiple invoices?

Answer: Yes. In the Transactions Detail screen, enter the amount of the check in the Amount field. You will see all outstanding invoices displayed in the portal below. If you select the Projects button just to the upper left of this portal, it will display all the projects that this client has. Simply apply to the project(s) and it will pay off the invoices in chronological order, until there are no funds left to apply.

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Question: Can ArchiOffice integrate with the Outlook Exchange Server?

Answer: Yes.

Question: I still use ArchiOffice v8. Has the Installation process for AO2011 been made easier? v8 was cumbersome.

Answer: Yes. ArchiOffice v8 was cumbersome to install since it also required installing FileMaker Server and FileMaker Pro on the client computers. ArchiOffice 2011 only requires an installation on the server. The server will push the software when requested to the client computers.

Question: I run a small residential/light commercial firm with 1-3 employees and would love to utilize the power of ArchiOffice but the input seems lengthy for small projects. Do you have templates that demonstrate the use of ArchiOffice for very simple projects?

Answer: We have many customers that are 1-3 person firms, doing very simple projects. One of the beautiful things about ArchiOffice is that it can be as simple or complex as you want it to be. If you would like to know how to simplify ArchiOffice to work the way your firm needs it, please consider signing up for one-on-one training. Our experienced trainers will learn about how your firm operates and help you setup ArchiOffice to meet your needs. Please contact your ArchiOffice Account Manager to find out more.

Question: I miss the option of sorting by Client Company when running billing reports. Currently it only sorts by Client Name (first name, last name), when selecting client.

Answer: You can either customize our report or create a new custom report to display Company Name rather than Contact Name by using the free iReport Writer from JasperSoft. Or you can request our Custom Reports Team to create the report for you. Custom report requests can be emailed to customreports@bqe.com.

Question: Would it be possible to see the Time/Expense description field in the List view?

Answer: Actually, you can see this information in the Time & Expense>Filter screen, not in the List screen.

Question: How do you refund an overpayment/credit?

Answer: If a client has an overpayment, you would go to the Contact module and the Refund button will appear at the bottom of the Contact>Invoices screen, to the right of their Account Balance.

Question: How can I use Outlook for Mac to sync with ArchiOffice?

Answer: If your firm is using Outlook on the Mac and you want to sync with ArchiOffice, you will need to use either the Apple suite or Entourage to sync with Outlook and then ArchiOffice will sync with the Apple suite or Entourage.

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Question: Is there a report that shows a summary of all items invoiced to the client? I often receive requests for billing summaries.

Answer: Yes. An easy way for you to do this is to go to the Project>Billing>Invoices screen. You can click the value of the TOTAL (right-most column by default). This will launch the Time/Expense module and display all the time and expense records that were included on that invoice. If you only want to report on the expense for an invoice, click the Expense value. Then go to the Reports module and print the time and expense report called "Slip Report." Make sure you select the Use Current Found Set checkbox. Set the display details based on what you like.

Question: Can I print a RFI/Submittal Log directly from the RFI/Submittal Screen? With the tables organized exactly how I want?

Answer: You would need to create a custom report using the iReport Writer from JasperSoft. Custom reports are generally fast, easy and affordable when you have our team create them. Custom report requests can be emailed to customreports@bqe.com.

Question: How do you make a line graph of Hours vs. Time for a specific project with different lines for different employees?

Answer: We don't currently provide this chart. You can export the time and open it in Excel, where you can create the chart you are looking for.