



## **ArchiOffice 2012 Build 12.0.291.0 Release Notes**

Version: 12.0.291.0

Release Date: 26-Feb-2013

### **FIXED ITEMS:**

#### **Billing:**

1. Fixed a problem when creating invoices using Stipulated Sum or Percent of Construction methods. The invoice totals were not calculating correctly when using Internet Explorer only.
2. Fixed a problem where Project Tasks would not load properly under certain conditions.
3. Fixed a problem where the Invoice Title and Invoice Message would not update.
4. Fixed a problem where phases that bill hourly with a cap were not being respected. Now, if the phase has a cap, when creating invoices the cap will be honored.
5. Fixed a problem where certain invoice messages would not allow an invoice to generate.

#### **Reports:**

1. Enhanced the Work in Hand report to display the Contract amount, Un-paid amount, un-billed amount and billing method for the project.

#### **Documents:**

1. Fixed a problem where document templates were not correctly displaying the "CurrentLongDate". When using this field, the time will also display.
2. Fixed a problem where newly created documents would not also launch. Now when documents are created from templates the associated application will launch and open it as well.
3. Fixed a problem where the document date displayed was not correct. It will now display the documents last modified date.
4. Fixed a problem when scrolling through multiple pages of documents.
5. Fixed a problem in Project > Documents where the scroll position of the selected folder would not be remembered.
6. Fixed a problem where folders that started with the letter "u" would cause problems in unrelated areas of the Project module.

#### **Contacts:**

1. You can now search for contacts using the "Created by" and "Modified by" fields.
2. Fixed a problem for contacts whose company name had an ampersand (&) which would cause display problems.

#### **Time / Expense:**

1. Fixed a problem where Totals would not always display correct numbers.
2. Fixed a problem in the Day viewer grid in the Detail screen. It will not display



records for deleted users.

3. Fixed a problem when using the Print button from the Timecard and Expense Card screens if the employee field was left blank. Report will now display the data that is visible on the screen.
4. Fixed a problem where the lists of Tasks would not display in the exact same order as set in the Project > Tasks screen.
5. Fixed a problem where completed tasks would still be available on the timecard.
6. In Time / Expense > Filter screen, fixed the Project Number dropdown list so the order is now displayed in alphanumerical order.
7. Fixed a problem when editing a time or expense record and it would occasionally also modify the project name.
8. In the Details screen fixed the Record Totals shown in the lower right of the screen.
9. In the Details screen fixed the navigation for the Day Viewer grid.

#### **Project:**

1. Fixed a problem where the Principal, Originator and Leader fields would be cleared whenever a new client was assigned to a project.
2. Fixed a problem when creating Submittals and the date would not be saved.
3. Fixed a problem where under certain conditions projects that are invoicing using the Stipulated Sum method would have incorrect totals displayed.
4. Did a major fix when adding sub-phases. If a project has already invoiced a phase, it can no longer be modified by creating new sub-phases. Previously, users were given the option to override this with a warning that would lead to problems they could not foresee. Now, only unbilled phases can be modified by adding sub-phases. If that phase has time or expenses records, a dialog will appear notifying the user that the slips, tasks and budget associated with the phase will be moved to this sub-phase. If the project does not use the option "Use Tasks for Time", the user is given the option to leave the tasks at the Parent phase level and not push them down to the new sub phase

#### **Calendar:**

1. Fixed a problem where the calendar would freeze if an event name included apostrophe.
2. Fixed a problem where in certain conditions the Filter Tab would not function properly.
3. Fixed a problem when trying to use the "Assign Others" button to an event.

#### **Preferences:**

1. Fixed a problem where the ability to reorder items using the move-up and move-down buttons would not work.
2. Fixed a problem when creating new users if their Name or Login Name included an apostrophe.
3. Fixed a problem when changing Date from US to International and the format



would not populate to the Calendar module.

4. In Preferences > Billing > Tax fixed a problem when using fractional tax rates for Job Codes. It was rounding the fractions to the nearest whole percent. The fractions are now respected.
5. In Preferences > Contacts > Defaults: fixed the button for updating existing contacts with the modified custom checkboxes.



## **ArchiOffice 2012 Build 12.0.283.0 Release Notes**

Version: 12.0.283.0

Release Date: 18-Jan-2013

### **FIXED ITEMS:**

#### **Billing:**

1. In Project > Billing > Options fixed a bug where an adjustment is made for an invoice; it was not being saved under certain circumstances.
2. In Project > Billing > Options invoices fixed a problem for invoices that included an adjustment where the sub total was not correctly calculated.
3. In Project > Billing > Options fixed a problem for Stipulated Sum invoices where adjustments were being included even though the adjustment field was set to "no adjustment".
4. In Project > Billing > Options fixed a problem for Stipulated Sum invoices where the Basic Services section would still appear even if there were only additional services and no basic services.

#### **Reports:**

1. Fixed a problem on reports that display interest. The actual field ID was being displayed not the field value.



## **ArchiOffice 2012 Build 12.0.281.0 Release Notes**

Version: 12.0.281.0

Release Date: 31-Dec-2012

### **FIXED ITEMS:**

#### **Report:**

1. Revenue Summary: Top 10 (New Report)
2. Cash Flow vs. Revenue (New Report)
3. New Business by Type (New Report)
4. Work in Hand (updated)

#### **Billing Issues:**

1. Projects > Billing > Options: When invoice is generated with invoice date that is different than current date. It still displays current date. This was corrected.
2. Projects > Billing > Options: Expense Mark-up (set as %) is incorrectly applied. This was corrected.
3. Project > Slips: On changing the project of a slip whose job code has a sub we see that it is not displayed when we use the basic/additional filters. This was corrected.

#### **Project Issues:**

1. Projects > Details > Phases/Codes: when deleting phases, the respective job codes, tasks and sub-phases are not cleared. This was corrected.
2. Projects > Billing > Budget: screen loading was optimized.

#### **Preferences Issues:**

1. Preferences > Project > Phases/Job Codes: when deleting a phase from preferences, the respective job codes, tasks and sub-phases are not cleared. This was corrected.
2. Preferences > Project > Tasks: You can now create up to 4 levels of tasks and sub-tasks.
3. Preferences > Billing > Defaults: "Slips Require Approval" was not remembered on creating a new project. This is corrected.

#### **Tasks Issues:**

1. Project > Tasks: If a task was referenced by a time or expense record users were allowed to delete them. This was corrected. If a Task is used by a time or expense record it cannot be deleted.
2. Project > Tasks: Tasks referenced by time or expense were allowing adding sub-tasks. This was corrected. If a task is already used by a time or expense record, sub-tasks can no longer be created.

#### **Invoicing/Reports Issues:**

1. Under some scenario's Invoice and Report headers were not displaying correctly. This is corrected.



## **ArchiOffice 2012 Build 12.0.273.0 Release Notes**

Version: 12.0.273.0

Release Date: 10-Dec-2012

### **FIXED ITEMS:**

#### **Projects Issues:**

1. Project – Tasks: Under certain scenarios when user deletes or updates an existing task it would result in application time out.
2. Project: Fixed a problem when changing basic job code to additional. It would result in a message "Job code is in use in slips" and ignores the change.
3. Project: Under certain scenarios when a new project is created it would result in application time out.

#### **Billing Issues:**

1. Formula to calculate Invoice percentage was corrected.

#### **Report Issues:**

1. Report description for Billing Analysis changed to be more specific.



## **ArchiOffice 2012 Build 12.0.263.0 Release Notes**

Version: 12.0.263.0

Release Date: 11-Nov-2012

### **FIXED ITEMS:**

#### **Sync Issues:**

1. Fixed an error in syncing events longer than 3 hours from AO calendar with iCal/Entourage on the Mac.
2. Fixed a problem when using ArchiOffice to generate an email in Outlook and AO does not use a signature. If the AO Signature field is blank it will use the Outlook signature default.
3. Fixed a problem when using ArchiOffice to generate an email in Outlook. When AO has an HTML signature, it will not be created with HTML formatting and not as plain text.

#### **Billing Issues:**

1. Fixed a problem where retainer payments were preventing invoices from being deleted even if the retainer was not associated with it.
2. Fixed the screen display in the Billing Module where the page link buttons were spaced too far apart.
3. In Project > Billing > Options: Invoice Output tab, the Invoice Template dropdown list has been made wider for enhanced visibility.
4. In Project > Billing > Options: Invoice Output tab, fixed the Invoice Message field to allow users to delete or modify the message.
5. In Project > Billing > Options fixed the problem where the Current \$ field value changed based on a "rounding" rule after clicking Save.
6. Fixed many problems that resulted from changing Invoice methods.
7. Fixed many problems that resulted from having sub-phases.
8. Fixed many problems that related to budgeting hourly services.
9. Fixed a problem where tax rates were being updated but not properly reflected on the invoice.
10. Fixed a problem for invoices that include Hourly Basic Services on a project that uses the Stipulated Sum Invoice method.
11. Fixed an error that would occur for invoices that had multiple payments applied to the projects previous invoice.
12. When deleting transactions the grid is now refreshed to properly display amounts.

#### **Projects Issues:**

1. In Project > Slips you can now sort by column heading.
2. Fixed a problem where Project > Tasks could not have their Budget Start Dates modified or removed.
3. In Project > General>Data fixed a problem with the Folder link button.



4. In Project > Slips screen fixed a problem for expense slips with single digit dates would have the month/date values inverted.
5. Fixed the problem where Submittals could not be deleted in Detail view.
6. Fixed a problem for documents that are created in folders that are shared by two different projects. This is a very rare situation, but the behavior for both projects should be the same.
7. Fixed a problem in certain conditions where a document could not be deleted or edited.
8. In Project > Slips, if you select Type = Expenses – the screen now displays Expense Type not Employee
9. In Project > Billing > Budgets now all phases display the percentage field to two decimal places.
10. In Project > Tasks, fixed the problem when searching for Tasks, the Cancel button would not work.
11. In Project > Logs > RFIs, fixed a problem where the description could not be modified or deleted.
12. In Project > Events fixed the filters so Assigned User and Assigned Contact now function.
13. In Project > Tasks fixed the search so the Extend and Reduce functions work.
14. In Project > Tasks fixed a problem where To-Dos have been given a date but it does not display in the To-Do detail screen.
15. Fixed miscellaneous problems with To-Dos created from Tasks.
16. Fixed a problem creating events from the Project > Events module using the Action>New button would open the Appointment Detail view but not apply the Project Number and Project Name to the new record.
17. In Project > Logs > Drawings > Detail view, fixed a problem when creating a new record and then attempting to delete it. It would delete the prior record not the current one.
18. Fixed a problem in the Project > General screen. When adding a new Project Contact and clicking the Cancel button user would be taken to Dashboard rather than the original screen.
19. In Project > General > Data fixed the Construction Cost field to be currency rather than text.
20. Added a validate procedure when creating Awards in the Project > General > Data screen so that blank records can't be created.
21. Fixed a problem where the Project Leader and Project Principal fields were not being saved with the invoices created for the project.
22. Fixed a problem in Project > Logs>RFIs where advancing to the next page would not function.

**Contact Issues:**

1. Fixed the alignment problem that would occur after loading image files in the info screen.





2. Fixed a problem where changes made to a contacts address tab were not being saved if the user clicks to a new tab first and is prompted to save.
3. Fixed the Cancel button when searching for Contact>Log>Notes
4. Fixed a problem when new communication fields could not be added to a contact under certain conditions.
5. Fixed a problem where notes could not be deleted from Contacts>Logs.
6. Fixed a problem when searching for invoices from Contacts>Invoices screen would not return the found set but instead create a new contact record.
7. Fixed a problem for firms with extremely large contact databases where a long delay would occur when attempting to display Company Name or Last Name fields.
8. Fixed a problem where assigning a Document to a Note, Submittal, RFI or Drawing log would not actually link the document.
9. Fixed a problem where assigning a Project to a Note, Submittal, RFI or Drawing log would not actually link the Project.
10. Fixed a problem where assigning a Contact to a Note, Submittal, RFI or Drawing log would not actually link the Contact.
11. Fixed a problem where employees in the Contact database would have their names edited using the Name Link button in Contacts. Upon changing the name, the employee's time records would not migrate to QuickBooks properly.

**Calendar Issues:**

1. Fixed a problem where To-dos created from Project > Tasks were not properly saving.
2. Fixed a problem where creating repeating events could not be achieved under certain conditions.
3. Fixed a problem where repeating events would not end based on the number of occurrences requested.
4. Fixed a problem when saving Calendar records in detail view would not display the visual cue that the record was being saved.
5. Fixed a problem where international date formats were in use but the column headers were using US format.
6. Fixed display problems for attendees of an event in detail view.
7. Fixed a problem for Mac users where events that are toggled ON for the All Day field would not display current time when toggled OFF.
8. Fixed a problem where To-dos created from Project > Tasks and assigned to a user would not display in list view when using the Calendar Action>My List button.

**Dashboard Issues:**

1. Fixed a problem for International users where the Dashboard would return an error or crash.



### **Time / Expense Issues:**

1. In Timecard view fixed the Project field so when it is selected it will display based on the user preference settings.
2. In Timecard view fixed a problem where the total hours for the week that included hours for Saturday and Sundays would not properly calculate.
3. Privileged users can now modify the Cost Rate for a time or expense record regardless of its bill status.
4. Fixed a problem when updating incomplete time or expense records that had the "X" icon denoting they are incomplete. If the Update procedure makes the record complete, the "X" icon will be changed to a checkmark.
5. Fixed the List view so that Time records would display Job Codes and Expense Records will display the Expense Type.
6. Fixed a problem when updating the Cost rate in List view. It would not always update the found records with the new Cost Rate.
7. In Time / Expense Filter screen now you can filter by Status of Approved.
8. Fixed a problem in Time / Expense Detail view where in certain conditions the Save button would not be visible.
9. Fixed a problem in List view when clicking Find All the security settings for the user were not being honored.
10. Fixed security breaches in Time / Expense module and Projects module so users can not see hours of other employees if not privileged.
11. Fixed the Update-Reimb and Update-Non-Reimb feature in List view.
12. Fixed miscellaneous problems related to the Update feature in List view.
13. Fixed a problem in the Time / Expense>Detail screen when using the Day View Grid with Project or Employee Name filters.
14. Fixed a problem with the Time / Expense>Detail screen when the Day View Grid parameters would be cleared out when using the Action>New button.
15. Fixed a problem in the Time / Expense>Detail screen when using the Day View Grid without any Project or Employee Name. Now it will display all records in the date range.
16. In Time / Expense>Filter view fixed a problem when sorting by Date.
17. Fixed a problem when creating new time or expense records from Project > Slips screen. It will not add the original Project's Number and Name to the record.
18. Fixed a problem when only a partial project name would appear in the Project Name dropdown list when creating a time or expense record.

### **Document Issues:**

1. Fixed a problem for Internet Explorer 9 users where changing the display rows in Project > Documents from the default to 100 would result in an error where no records would be displayed.
2. Fixed a problem in Project > Documents when filters are in use and paging through the list would not function properly.



3. Fixed a problem in Project > Documents for files that had an apostrophe in their name would be duplicated upon a Save.
4. Fixed a problem in Project > Documents when filters are in use and user would attempt to delete a document (or delete the link to the document), and the page would not refresh.

#### **General Issues:**

1. Fixed an issue when sorting in list view, the sort order would change when moving to the next page.
2. Fixed a problem when searching for invoices by invoice number and then using the Find All button afterwards. If a user then sorted by column it would revert to the searched records, not All.

#### **Preference Issues:**

1. In Preferences>Users>Performance, fixed the screen so it only displays active employees and not terminated or on-leave employees.
2. No longer can Expense Types that are in use be deleted from Preferences.
3. Fixed the problems related to privileges for users to access Project > Billing screens.
4. I'm testing this log file to see who really reads it. If you are an ArchiOffice customer and read this, please email [burns@bqe.com](mailto:burns@bqe.com) and you will receive a special shout-out on our Facebook page and Twitter feed.

#### **QuickBooks Sync Issues:**

1. When creating vendor bills in QuickBooks the tax rate was not being sent to ArchiOffice. This has been fixed.
2. Fixed the problem sending employees with Salutations to UK version of QuickBooks.
3. Changed SmartMatch tool so it would not display ArchiOffice contacts without a first or last name.

#### **Report Issues:**

1. Added the ability to sort invoices in Reports.
2. Fixed a problem when an error would be generated in certain situations when creating a Timecard report.
3. Improved reports so they properly display phases and sub=phases to show their true relationship.

#### **Search Issues:**

1. Fixed a problem when searching for Transactions by Client Name.
2. Fixed a problem when searching for Invoices it would include draft invoices. Only finalized invoices are now searched.
3. Fixed a display issue if a search for invoices resulted in no records being found.



## **ArchiOffice 2012 Build 12.0.245.0 Release Notes**

Version: 12.0.245.0

Release Date: 17-Oct-2012

### **FIXED ITEMS:**

#### **Billing Issues:**

1. In Project > Billing > Options If a project is using the Unit Cost invoice method, a problem was fixed which involved sub-phases not having the amount remaining to invoice correctly calculated
2. In Project > Billing > Budget If a project is using Unit Cost invoice method, a problem resulted from toggling the Set Budget By between Fee and Percentage
3. In Project > Billing Budget fixed a problem when checking and then un-checking the Hourly checkbox for a phase with sub-phases
4. In Project > Billing > Options when using Percentage of Construction or Unit Cost fixed the problem where the Remaining Invoice fields were not being updated properly after creating an invoice
5. In Project > Billing > Budgets fixed a problem which would result in a crash when creating a new project and budgets were provided with hours and the fee had a decimal places
6. In Project > Billing > Budget fixed the problem when budgets were created with hours and fees and then moving to the Project > Billing > Options screen and setting the invoice method to either Percentage of Construction or Unit Cost. Values were not updating correctly
7. In Project > Billing > Options when invoice method is Unit Cost proper updates were not being seen in the Project > Billing > Budget screen for Fees
8. Project > Billing > Options fixed a problem when Stipulated Sum invoice method was used and an invoice finalized. In certain situations the Remaining Amount column would display a \$0
9. In Billing > Drafts fixed the problem when clicking the "All" checkbox and clicking the trashcan to delete all drafts. This process now works
10. Billing > Project screen fixed the calculation for Totals of the Last Invoice Amount
11. Fixed a problem where Stipulated Sum invoices were rounding totals even if the actual amount included decimals
12. Fixed the problem creating Unit Cost invoices with sub phases

#### **Preferences:**

1. In Preferences>Users>Security: Projects – when a user is prevented from seeing any of the 5 screens associated with Project >Billing this function now works. Previously, a user would be provided a warning that they are not allowed access, but they page would load anyway

**Projects:**

1. In Project > Events – fixed a problem when attempting to create a new event using the NEW button. It would move to the Calendar module but not properly populate the Project Name and Project Number fields.
2. Fixed a problem when ToDo's are created from a Project Task and would not appear on the Dashboard in certain situations
3. Fixed a problem with ToDo's created from Tasks that already had a Budget Start/End date set for the task. The ToDo was not inheriting the date
4. Project > Billing > Options screen fixed the problem with sub phases not properly showing the Actual % when Time is associated with the sub phase
5. Fixed a problem that would prevent users from deleting a Submittal
6. Project > Billing > Options – fixed a problem where the Current \$ field value would arbitrarily change after clicking the Save button
7. Fixed a problem where searching for transactions by client was not functional
8. Project > Documents – fixed a problem where hidden files (created by the OS or a temp file by an application) in the project folder were being displayed
9. Project > Documents – enabled the Rows dropdown menu to allow users to determine how many documents should appear on screen before needing to advance to the next page
10. Project > Documents – fixed the problem when deleting a file (link). It was not changing the display color of the file name to red which indicates it is not part of the database
11. Project > Billing > Budgets – fixed the problem where a phase with sub phases was changed to Hourly – the parent phase were still displaying a percentage amount even though the sub phases were zeroed out

**Contacts:**

1. Contacts>Logs- fixed a problem when using the Date Filter fields in the Detail view

**Reports:**

1. Fixed a problem with Time and Expense reports where the Totals and Totals + Tax + Markup were incorrect if a time record was marked as No-Charge
2. Fixed the Project > Budget vs. Invoiced Report where certain fields were not calculating properly when sub phases exist
3. Fixed the Billing reports so they would not include Draft invoices

**Time & Expense:**

1. Time/Expense>Filter - Fixed the filter tab to included "Approved" in the status field
2. Time/Expense>Detail - Fixed a problem where in very rare instances the Save button would disappear from view.



## **ArchiOffice 2012 Build 12.0.239.0 Release Notes**

Version: 12.0.239.0

Release Date: 5-Oct-2012

### **FIXED ITEMS:**

#### **Billing Issues:**

1. In Project > Billing > Options > Stipulated Sum Grid, fixed an issues where the "Invoiced Past %" totals field would contain "NaN" rather than the correct number
2. In Project > Billing > Options > Stipulated Sum Grid fixed an issue where upon finalizing an invoice the Past % fields were updated incorrectly
3. In Project > Billing > Options screen fixed an issue when creating draft invoices. The Invoice Past % field was being modified as if the invoice was already finalized. This would also create incorrect values on the actual invoice
4. In Project > Billing > Options > Stipulated Sum Grid, modified the layout so it will always displays two decimal places
5. In Project > Billing > Options fixed an issue for a project that has sub-phases, where the Invoiced Current % and Invoiced Current % Totals are not reconciling properly
6. Fixed an issue on stipulated sum invoices where the Fee Summary Totals field, and the Remaining Totals field did not sum correctly
7. Fixed the distortion problem for footer logos on the standard invoice templates
8. On a Stipulated Sum invoices, fixed an issue where the "Previously Invoiced: Amount Billed " field was displaying the incorrect value
9. Fixed an issue related to deleting credit payments where the total payments were not properly updating to reflect the deleted credit
10. Fixed an issue were setting a tax rate for a project in the Project > Billing > Options > Tax > Tax methods screen and then later changing the project to "No Tax" was not updating all the existing current records so as not to include tax on an invoice
11. Project > Billing > Budgets fixed an issue in certain browsers where expanding a parent phase would create a blank screen
12. Fixed the problem where expenses marked Employee Reimbursable would not appear on invoices. Only non-reimbursable expenses should not appear on invoices

#### **Contact Issues:**

1. Contacts>Logs>Drawings fixed the problems associated with assigning a project and adding a drawing to the record
2. Contacts>Events fixed the Help button
3. Improved the speed when performing a QuickSearch in the Contacts module for large databases
4. Fixed the problem when performing a Contact Search and clicking the Name



- field on large databases
5. Contact>Invoice fixed the problem which would change the Account Balance to zero when sorting by any of the columns

**Data Conversion Issues:**

1. Fixed an issue with databases converted from prior versions of ArchiOffice where the Dashboard would sometimes not display properly
2. Fixed an issue with databases converted from prior versions of ArchiOffice where the communication details for a user would be missing

**Project Issues:**

1. In Project >Tasks fixed the problem where task start and end dates could not be removed
2. In Project > General>Data, fixed the link to Change Folder for Project photos
3. Project >Details fixed a problem when deleting phases and leaving only one would result in the inability to highlight or activate it
4. Project >Details>Phases / Codes fixed a problem where Job Codes had Sub Codes and Sub-sub Codes. When attempting to reorder the parent Job Codes a crash would occur
5. Project >Tasks fixed the Cancel button when conducting a Search
6. Project > Search – fixed the Project Number search screen so the search is “Equals” not “Like”. This means if you search for a project number “1000” it will only return a project with that number and not a project number “1000a” as well
7. In Project >Budgets changed the % field to display two decimal places
8. Fixed the problem when making over payments on projects, creating new invoices and then deleting the prior over payment. The Invoice Balance Due was not properly updating
9. Project > Billing > Options fixed the Interest field so it would display as a percentage and not a dollar

**Document Issues:**

1. In Project >Documents added a feature to Save All the documents into the database. Now you can save a selected document or all documents easily
2. Fixed an issue where users would get an error message about "Missing CSS files" when trying to open a Word document using Chrome or Internet Explorer browsers
3. In Project >Documents Fixed an issue whereby in certain situations when using the Action>Save Selected Item would return an error that the parent folder is not yet saved
4. In Project >Documents fixed an issue where a user would not be able to edit a document in certain folders
5. In Project >Documents fixed the problem with documents vanishing from the screen when attempting to sort by description



6. Fixed the problem where certain users could view reports and not project documents while other users could only view project documents and not reports
7. Project > Documents fixed the problems related to document creation and deletion for projects that share the same project folder. NOTE: This is an unusual situation and not recommended

#### **Time / Expense Issues:**

1. Fixed a problem when attempting to print a Timecard report from the Timecard screen for certain users
2. Fixed a problem where time and expense records that have been finalized and marked as Billed could not have their cost rates modified by privileged users
3. Fixed a problem where incomplete time and expense records are updated but the incomplete icon is not updating to reflect the fact that the slip is now complete
4. Fixed a problem in the Time and Expense screens where the Project field would display all active projects instead of only the active projects for the selected employee
5. Time/Expense>List screen fixed the Update Cost Rate feature which was not properly updating the cost rates for the found set of records

#### **General Issues:**

1. Fixed an issue where the Help button would not function after performing a search in all modules
2. Fixed a problem encountered by certain users when attempting to create a new database
3. Preferences>User>Details>Projects fixed a spelling error on screen
4. Fixed an issue for users who installed cleanly with version 2012.0.208.0 where new databases would display the EngineerOffice logo on reports and invoices rather than the ArchiOffice logos
5. You can no longer delete Expense types if they are in use

#### **QuickBooks Sync Issues:**

1. Fixed an error that would occur when syncing ArchiOffice with the Canadian version of QuickBooks. The error was related to Province settings in QuickBooks
2. Fixed an error that would occur when syncing ArchiOffice with the Canadian version of QuickBooks. The error was related to Getting Payments from QuickBooks
3. Fixed the problem when syncing ArchiOffice with the Canadian Version of QuickBooks. The Communication types for the contact did not transfer to QuickBooks
4. Fixed the problem when syncing ArchiOffice with the Canadian Version of QuickBooks. The Country field was not being transferred from QuickBooks to





5. Fixed a problem for ArchiOffice contacts that have no First or Last Name. The ArchiOffice QuickBooks Smart Match tool would have no way of allowing a user to figure out the record
6. Fixed the problem with syncing with QuickBooks when it is in multi User Mode
7. Fixed the way vendor bills in QuickBooks are synced into ArchiOffice. If the vendor bill has no items associated with it the ArchiOffice description field would have unnecessary dashes in front of the vendor name
8. Fixed a problem when syncing payments from QuickBooks. If the payment fully pays off the invoice, ArchiOffice was not flagging the invoice as fully paid

**Calendar Issues:**

1. Calendar>Details Screen: fixed the issue with start/end times displaying twice when attempting to Repeat the event
2. Fixed the calendar “Today” button to work throughout the application for all browsers
3. Fixed user interface issues in the Calendar>Details



## **ArchiOffice 2012 Build 12.0.232.0 Release Notes**

Version: 12.0.232.0

Release Date: 26-Sep-2012

### **FIXED ITEMS:**

#### **Billing Issues:**

1. Fixed issues related to invoicing with Stipulated Sum invoices where hours for fixed fee phases were being included in total hours for hourly fees
2. Fixed an issue where phases and sub phases would not always display in the expected order
3. Invoices that itemize time by employee now allow the full employee name to be displayed, not just their initials
4. Fixed a problem where the wrong client name was being used for invoices. The name and address from the client's billing tab are now being used not just the address and the main contact name
5. Fixed an issue where certain databases converted from prior versions of ArchiOffice with sub phases were showing amounts remaining to invoice but the parent phase was showing \$0
6. Fixed an issue in the Billing > Projects module where the column total was not calculating correctly
7. In Project > Budgets, the phases and sub phases now display the percentage field to two decimal places consistently
8. In the Billing Module improved the user interface for page links displayed at the bottom of the screen

#### **Project Issues:**

1. In Project >Details fixed an issue when employees are deleted from the database the fields changed to "Deleted". Now their name will remain in the display but will not be available in the dropdown list
2. In Project > Budgets, the phases and sub phases now display the percentage field to two decimal places consistently
3. In Project > List view fixed the tool tip displayed when hovering over the Edit icon. The tooltip now displays "Edit Project"
4. In Project > Logs>Submittals fixed an issue where the Description field was unnecessarily truncated
5. In Project >Billing > Options the Invoice Output tab displays a wider Template dropdown menu to accommodate long invoice template names

#### **Search Issues:**

1. Fixed the Project Search screen so entering in a project number will only find projects of that number, not projects that include that number

#### **Time/Expense Issues:**

1. In Project > Billing > Invoices you can now click on a value in the Totals column



- and display a list of time/expense records that are linked to that invoice
2. Fixed an issue when updating a list of records in the Time/Expense List view. If the records are marked as incomplete and after updating them they are complete, their status now correctly updates to complete
  3. In Project > Slips fixed an issue when the radio selection is set to Expense. Now the “Employee” column is changed to “Expense Type”
  4. Fixed the Time/Expense List screens Update function for updating cost rates

**Contact Issues:**

1. Fixed a problem in the Contacts>Detail>Miscellaneous screen where saving data was not being properly saved

**Preference Issues:**

1. In Preferences>Users>Sync changed references to “MAC” to “Mac”
2. In Preferences>Users>Performance the list of employees now only includes active employees

**Document Issues:**

1. In Project > Documents fixed an issue when hovering over the name of a document. Now the full file name will be displayed regardless of whether the document is added to the database or not
2. Fixed an issue where documents were not able to be opened when referenced from Mac OS

**Miscellaneous Issues:**

1. Fixed miscellaneous conversion issues discovered during customer conversions from prior versions of ArchiOffice.



## **ArchiOffice 2012 Service Pack 1 Release Notes**

Version: 12.0.229.0

Release Date: 20-Sep-2012

### **FIXED ITEMS:**

1. Updated Help file
2. Updated Conversion Tool
3. New Sample Company File component
4. Preferences > System>Invoice Logos: fixed the default logo
5. In Preferences > System > Print Setup: fixed a bug for converted databases where the standard label and envelope dropdown lists were blank
6. Preference > User > HR: fixed problem of adding employees
7. Contact > Project: fixed problem using the Delete Project button
8. Contacts > Logs > Notes: fixed an issue where certain users were unable to add notes in this screen only
9. Project > Details: fixed a bug where Project Status was not being properly saved
10. Project > General>Performance: fixed a problem where additional services were incorrectly displaying a project as over-budget
11. Contacts > Documents: fixed an issue where certain users were unable to create new documents
12. Contacts > Details: fixed an issue where the Avery 3261 label would not print correctly
13. Project > Tasks: fixed a problem where the Search Task button was not working properly and was returning a blank list
14. Project > Documents: fixed the Action menu to save selected documents or all documents to the database
15. Project > Documents: added to the Action menu an item called Set Project Folder (Enterprise edition)
16. Project > Documents: added to the Action menu an item called Open Project Folder (Pro and Enterprise editions)
17. Project > Documents>List: fixed a problem where duplicate documents would appear in certain situations
18. Project > Documents: fixed the tool tips for the Action menu
19. Project > Documents: fixed an issue where in rare situations a document could not be created and an error was telling the user a folder needed to be selected first even though it was selected
20. Set Project Folder: fixed a problem where the dialog was displaying the templates path rather than the project path
21. Project > Tasks: fixed a problem where dates for tasks were not being properly saved
22. Project > Billing > Options: fixed a screen refresh issue for calculations
23. Project > Billing > Options: fixed an issue where Stipulated Sum projects were displaying incorrect values in the "Past \$" and "Remaining" columns



24. Fixed a bug where in certain situations, expenses didn't show up on invoices, but the totals were still correct
25. In Time/Expense > Timecard: fixed a problem where the Print button would not always generate the timecard report
26. Billing > Projects: fixed a problem where the screen would take too long to load and/or cause a SERVER error
27. Improved the AppleScripts fixing a problem where opening documents would fail for Mac OS 10.8 users
28. Fixed an issue when time and expense records were marked as DRAFT and a user would make the project require slip approval afterwards. If the draft was deleted, the time or expense record had been automatically marked as Approved but the checkbox was not displaying correctly
29. Various user interface issues fixed
30. Calendar > Detail: fixed an issue where an assigned user (other than the creator of the item) to a To-Do was not seeing the item in the Dashboard>To-Do list
31. Fixed a bug where a user who was denied access to see the Time and Expense records for another user was also denied access to all screens in Projects. Only the Project > Slips screen is denied
32. Reports: fixed a problem for users on a Firefox browser where the search results were not being properly displayed before running the report
33. New Reports
34. When Non-Reimbursable option for an expense is checked: fixed an issue where no details were showing up on the Invoice. Also repaired: Details not appearing when both ER & NR options are checked
35. Syncing with Outlook: fixed an issue where it was creating the folder as EngineerOffice instead of ArchiOffice
36. Error while transferring client to QuickBooks using customer database is now fixed
37. Help related links fixed
38. Tasks Search screen: fixed issue where Search wasn't working well and was displaying a blank list
39. Project folder dialog always showing templates directory in tree view: fixed— it now shows as per path given by the user in the text box
40. Fixed: project documents list showing duplicate documents in case of same location of multiple projects
41. T/E List View: fixed problem when users selected Change Project or Bill option of Update feature and clicked cancel, the totals (Hrs, Time, Exp) were shown as zero
42. In Project > Slips > Expense radio button: fixed issue of Totals and Expense Type overlapping when entries in the grid were more than 7
43. RFI > Contacts > same RFI event on Calendar screen > View RFI link > Assign Document link: fixed issue where the Assign Document screen opens, but when



user tries to assign a document to RFI, they notice Assign screen does not get closed, though the documents get assigned

- 44. Contacts > Misc Tab: Assigned to dropdown list overlaps
- 45. Fixed: issue when a user has multiple documents open, then scrolls through the documents, they notice document entry overlaps with upper border
- 46. Invoice phase organization: fixed issue where sub-phases exist incorrectly
- 47. Fixed: issue of Help button not working in List of Tasks screen
- 48. General tab of Projects: fixed issue of being unable to assign a contact to the attendee list when editing a milestone. Also repaired: issue of when user clicks Assign, the pending status of this Event disappears
- 49. Project > Slips: fixed issue of Time radio button and Expense radio button being reversed when appearing in the grid. Also repaired: when user selected any phase in the Expense entry grid, they only got the expense of that phase. Also repaired: when users wanted to get the expense of all phases, they were hitting the Clear filter, which, instead of displaying expense entries, was displaying time entries
- 50. Billing > Project: fixed that the list was overlapping with Total and Grand Totals

#### **NEW FEATURES:**

- 1. Project > Documents: implemented the Custom Folder path to allow users to designate the location for project documents. This feature is accessible for Enterprise users from the Action Menu
- 2. Project > Documents: implemented the Open Project Folder feature to allow users to open the project documents main folder using their operating system. This feature is accessible to Enterprise users from the Action menu
- 3. Project > Documents: added a SAVE ALL feature to make database records of all the project documents. This feature is accessible to Pro and Enterprise users from the Action menu
- 4. Implemented the Thumbnail feature for documents