A03 — Archive Scope Amendment (Accounting + Purchases + Subscriptions + Project Costs) — Feb 2026

Effective: Feb 2026

Last updated: 2026-02-20

Purpose: Lock additional required tabs/sections for **Archive (Reports & Records)** and confirm Project cost rollups.

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1) Archive (Reports & Records) must include

A) Accounting (tab)

- High-level financial rollups derived from purchasing + project cost tracking:

 - Daily / weekly / month-to-date totals

 - Category totals (engineering, AV/IT, deck, interior, etc.)

 - Vendor totals (top suppliers/contractors)

 - Project totals (see below)

- Exports: summary tables and "management pack" bundle (later), saved under Exports & Packs.

B) Purchase Histories (tab)

- Full purchasing audit trail:

 - Requisitions created / approved / ordered / received

 - Invoice / receipt records (if captured)

 - Delivery status timeline

 - Links back to Inventory items and WOs/Projects that initiated the purchase

C) Subscriptions (tab)

- Subscription register (especially AV/IT):

 - Vendor/service, renewal dates, cost, payment method (optional), owner/assigned-to (optional)

 - Notifications: renewals due, payment failures (if tracked)

- Links to the originating "Subscriptions" area in Inventory & Requisitions

D) Project Cost Projections (tab)

- Project totals and projections:

 - Budget vs actual spend

 - Forecast remaining cost

 - Time-to-complete (optional later)

 - Links to the originating Project record

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2) Project costs data source (rule)

- Project cost totals are generated from **Jobs created in the Project screen**.
- Purchases and WOs can optionally reference a Project/Job to allocate cost.
- Archive rollups read:

 - Project Job records (planned budget + milestones)

 - Linked purchasing totals

 - Linked WO labor/parts totals (from WOT Reports and WO tracking)

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3) New screen acknowledged

- There will be a dedicated **Projects** screen (name TBD) that creates Jobs used for project cost tracking.