



# PASCONCEPT

A screenshot of the PASconcept website. The header includes the logo, a "Sign up on free version" link, and a "Login" button. The navigation menu has links for HOME, TOUR FEATURES, ABOUT, FAQ, PRICING, CONTACT, and BLOG. The main content area features a large image of a man in a suit looking at a tablet, with text describing the software's features: "Online management of projects, fee proposals, billing, timesheets and subcontracts for architectural and engineering firms. Real-time interaction between the Administrators and their Clients, Employees and Subconsultants." A green button says "Sign Up for a 30-Day Free Trial". Below the main image are icons for people and buildings, and a smaller image of modern skyscrapers.

*A new concept to provide Project Administration Services online*

Version: 4.3.2 Last Update: 04/15/2015

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[www.Axzes.com](http://www.Axzes.com)



## User Manual

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## **Introduction**

PASconcept is a web application that covers all the administration process of one or more projects, mainly for Architecture / Engineering (A/E) companies at the design phase.

First, it is important to consider the way most companies currently manage their projects and how this affects time consumption, organization and clients and budgets control.

For instance, the administration flow during a specific project phase, for a company that is currently developing its administrative management using different programs or software, generates dispersed documentation and questionable safety.

The Project flowchart shows the main elements of a project administration, as well as some of the tools typically used for project management, which of a project, and in turn some of the tools typically used for project management, which produce what we call Project Administrative Documentation. Much of this documentation is common to the different entities involved in the project.

### **Why are projects managed this way?**

The programs that could help an A / E company are not specifically designed for them and they not cover the administrative process of an entire project. That is why every company has developed its own way manage administration with different methods.

It is precisely the need to fully cover the project administration process, what originates the idea to develop PASconcept, a new concept to provide a comprehensive project management service.

The PASconcept team, composed of engineers, architects, programmers and designers has since 2007 developed and refined Project Management Service (PAS), and has built many tools to help in the administrative processes, which have turned out to be essential in the companies where it has been implemented.

### **Administrative Project Management**

The administrative management of a project includes factors that A / E companies handled daily, however, they are not conceptualized in ways that make us understand the importance of controlling them. We spend too much time on them for the lack of a tool to coordinate and control the whole process.

An Administrator interacts with Clients, Sub Consultants and Employees in the phase prior to project star. Proposals are submitted to Clients, which must take into account all the disciplines necessary for the subsequent design stage.

Once the negotiation is finished, a New Job is generated, which will have its Budget (Budget) that will be mainly spent in the time consumed by the employees involved. At the same time, the project has to be charged according to the billing schedules (payment schedule) accepted in the proposal.



## Project Cycle Step by Step

1. **Site Login ADMIN.** An Admin user enters the application using his/her credentials
2. **Create / Select Client.** Creates tab the Client tab requesting the project; in case the user is not already registered.
3. **Create PROPOSAL / Emitt to Client.** Creates a New Proposal associated to the Client and classifying its kind. The Proposal is reviewed and submitted to the Client, who will receive an email with the information on the Proposal, the Task and services associated along with the corresponding price, the Payment schedule with Terms and Conditions and signature of the person in charge.
4. **Login CLIENT Site.** Upon receiving the email , the Client, enters his/her profile using his/her credentials, with just a Click on the link received in the Notification Email.
5. **Accept or Decline.** This link takes the User to the Accept or Decline Proposal form, with his/her data, Task, Fees, Payment Schedule and Terms and Conditions.
6. **Decline.** If the Client does not agree with any of the Terms of the Proposal, he/she can select the "Decline" button. The Admin is notified and the Project cycle is aborted.
7. **Sign & Accept.** If the Client with the conditions set, the accept button must be selected, which takes you to a "Digital Sign" window. The admin receives a notification of acceptance.
8. **Create / Edit JOB.** Creating a JOB can be done directly from the "New Job" option, or by the "SET Proposal" status, in Step 7. Job editing allows to:
  - Complete all data
  - Issue Invoices according to the payment Schedule Defined in Invoices (s)
  - Record the Collections of these Invoices Payment (s)
  - Record payments to Subconsultants for RFP associated with the Job
  - Linking Files that were previously "Uploaded"
  - Invoices Management: Generate Invoice (s) Schedule (%) generates the invoices and payment schedule.
  - Payment (s) record the amount charged
9. **Create / Select Subconsultant.** Once the proposals approved, and the Job created, it is sometimes necessary to subcontract external work/services. for this purpose, a partner Sub-consultants record is kept.
10. **Create Request For Proposal (s) / Emitter.** If necessary for the project, you can create one or more Requests For Proposal by Disciplines, and send them to the Subconsultants.
11. **Logins SUBCONSULTANT Site.** Upon receiving the email, the Subconsultant accesses your're his/her profile his/her credentials with just a click on the link received in the email notification.
12. **Complete RFP / RFP Response.** This link takes the Subconsultant to the RFP editing form. The Subconsultant completes the task/ services requested by the Admin inits RFP, confirms the payments schedule and sends a notification to the Admin when everything is completed.
13. **Decline RFP.** If the Admin does not agree with any of the terms of the RFP, he/she can pass it to the "Decline" status. The Subconsultant receives a notification and the RFP cycle is aborted.
14. **SET RFP.** If the Admin agrees with the conditions set, he/she switches it to the "Accept" status. The Subconsultant receives a notification of acceptance and the RFP is assigned to the corresponding Job.

15. **Create / Assign Employee.** The Admin, during the Job editing process, assigns it to an Employee, who receives an email notification.
16. **EMPLOYEE LogIn Site.** The Employee, upon receiving the email, accesses his/her profile using his/her credentials.
17. **Insert Time Job.** Once in his/her Profile, the Employee, Inserts the time worked (in hours) in the Job that has been assigned to him/her.
18. Emitt(Issue) and Collect associated invoices
19. **Transmittal LETTER, Create / Emitted.** The Admin creates the Transmittal Letter associated to the Job, when it is at the delivery stage and all Invoices have been collected. This action is notified to the Client by Email.
20. **Transmited Letter, Receive/Sign.** The Client receives a notification that he/she may pick-up the deliverables associated to the Job completed (drawings, certifications, etc.) and he/she may sign from his/her Profile or directly at the delivery offices.

## User Profiles

PASconcept has different user profiles, according to their function. All the profiles play an important role in the project flow and collaborate intensively in each of its phases.

The defined profiles are:

1. Administrator Profile (Versions FREE, GROW and PROSPER)
2. Employee Profile (Versions GROW and PROSPER)
3. Client Profile (Version FREE, GROW and PROSPER)
4. Subconsultant Profile (Versions GROW and PROSPER)
5. Shared Profile (Version FREE, GROW and PROSPER)

## Notifications. Emails and messages among users

PASconcept sends explicit or implicit (automatic) notifications among users of the same or different profiles, by the completion of a particular phase. Notifications are of two types; internal emails and messages.

Users can configure which of the implicit notifications they wish to receive.

Many of the notifications can be configured by the Administrator user in the "Messages Templates" option, to customize the content of the messages sent.

Notifications Table

Message Subject	From	To	Content	Template
Proposal xxx Emitted	Admin User	Client User	Email + File	Yes
RFP xxx Emitted	Admin User	Client User	Email + File	Yes
Invoice xxx Emitted	Admin User	Client User	Email + File	Yes
Invoice Ready to Bill	Employee User	Client User	Email	Yes

Insert New Appointment	PASconcept	Employee User	Email + File	No
You have Accepted Proposal xxx	PASconcept	Client/Admin User	Email	No
You have Declined Proposal xxx	PASconcept	Client/Admin User	Email	No
Your RFP xxx have been Declined	PASconcept	Subconsultant User	Email	No
Your RFP xxx have been Accepted	PASconcept	Subconsultant User	Email	No
Invoice HR xxx Emitted	Admin User	Client User	Email + File	Yes
Statement xxx Emitted	Admin User	Client User	Email + File	Yes
Master Credentials	Admin User	Master User	Email	No
Employee Credentials	Admin User	Employee User	Email	No
Clients Credentials	Admin User	Client User	Email	No
Subconsultant Credentials	Admin User	Subconsultant User	Email	No
Employee Assigned Job	Admin User	Employee User	Email	No
%Budget (Job Profit) used information	PASconcept	Admin User	Email	No

## PASconcept User Login

To work in PASconcept, a user must authenticate in the Login page. The credentials are composed of an Email and a Password.

User Email  
myemail@example.com

Password  
\*\*\*\*\*

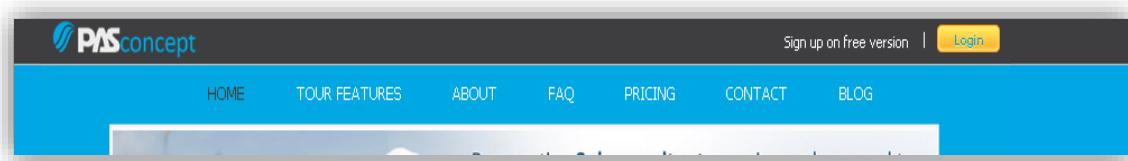
Keep me signed in

[Forgot your password?](#)

[Help](#) | [Terms & Condition](#)

## Ways to access the PASconcept app

1. The user (Administrator, in this case) receives via Email his/her credentials during the registration process.
2. The User (Employee, Client or Subconsultant) receives an email from PASconcept with an invitation and information about his/her credentials.
3. The User receives an Email to complete or accepting certain information (Client or Subconsultant) and a link leading to the login page.
4. In the main page <http://pasconcept.com/>, click on the yellow button "Login".



## Change My Password

The initial password is automatically generated by PASconcept, but the User can change it in Others / Account Options. A valid password must meet the following requirements:

- Minimum 6 (six) characters required
- Minimum 1 (one) nonalphanumeric character required

I forgot my password

If the user forgot his/her password, he/she must click on the link "Forgot your password?" to recover the account's password.

PASCONCEPT

Forgot your password?

Enter your **PASconcept account Email** and the characters shown.  
You may need to check your spam folder or unblock  
[info@pasconcept.com](mailto:info@pasconcept.com)

Type your Email

DHYO

Generate New Image

Type the characters to see in the above picture

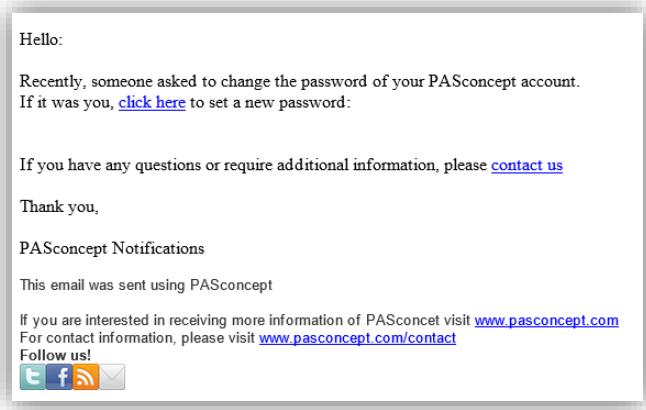
Recover PASconcept account

Help | Terms & Condition

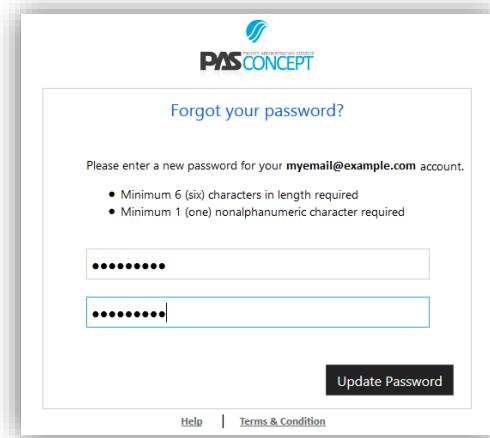
**Step 1.**

The User must fill out his/her Email application form and the control characters and press the "Recover PASconcept Account" button.

**Step 2.** PASconcept informs whether the data are correct, and that the User will receive an email with the corresponding account information.



Password change is completed by clicking on the link to the PASconcept password reset page.



## **Administrator Site**

The Administrator Site is the most important of PASconcept and it is available in all its versions. In the FREE version, it covers all the (reduced) functionalities of a project's flow.

The Administrator registers and organizes from his/her profile the Clients, defines project tasks (Tasks) according to the company type , as well as the terms and conditions required to submit the Proposals to these Clients.

## **Employees**

The Employee, along with the Administrator, the Client and the Subconsultant have been defined as the entities that collaborate in the project life; each of them is controlled from the Administrator Profile.

The Importance of the Employee is possibly the highest of all, because it is the A / E company's productive support, an the key force to develop a project, and its capacity is given by three factors:

- Reliability of the outcome of its work (project)
- Integration in the team involved in the project (the employee's personality)
- Time required to execute it.

PASconcept is currently working on integrating these three technical-administrative elements; but for now, it just considers the time that the employee needs to complete the project as part of the service provided by the application, and let the technicians do the rest of the factors.

The Administrator User is, at the same time, the first Employee. On the GROW and PROSPER versions the Admin can create other Employees, who collaborate in the project administration and monitoring (follow-up) tasks.

## Home Page

Home: It displays a number of graphs and tables summarizing the Company's information by year.



The left side of the screen shows other graphic information (Proposals, Jobs, Clients, and Employees)

These graphs and tables summarize all the Company's information.

## Calendar

The Calendar provides the filters (Job, Calendar and Client) to simplify the search and the buttons to export:

Export to Outlook

Export to PDF

To change the calendar view for (Day, Week, Month, Timeline, Multi-day, and Agenda), click on the right corner.

Example: Month by page.

New Appointment, double-click on the selected day on the calendar, and enter the information requested afterwards, as shown below.

## Jobs

The Job is the main entity of PASconcept. All the application's work is associated to the Job, from before its creation up to its closure. The Job is the intercept point between the company (Consultant), the Employees, the Client and the Subconsultants.

A job contains and manages:

- The works and services carried out by Consultants and Subconsultants, committed to a Client by an accepted Proposal.
- The "Times" dedicated by the Employees
- Invoices issued to Clients and their corresponding collection
- RFP Payment to Subconsultants
- Links to resulting documents / images / plans
- Signature and delivery of Transmittal Letter

## **Jobs/Jobs List**

Jobs List is the most important page provided by PASconcept, for both the type and amount of information it contains, and the interpretation we can make of this information

### **Filters displayed:**

Period, Status Jobs, Jobs Types, employee, Client and Department

Pending Balances Button: A click here shows all jobs with pending balance.

Reload Button: Click here to refresh the search.

### **The table shows three types of columns:**

- Informative columns: Name, Job Type, Date Opened, Budget, Amount Pending, Budget Used and Sub-Contract
- Action Columns: Edit Job including Number, Status, Client Code; Edit Job including Job No., Status, Email / Print, and Delete Gmap
- Analytical Columns (Amount Collected, Budget Used (%))

Versions: FREE, GROW and PROSPER

### **Jobs List/Analytics Columns**

- Amount Collected: This column contains a circular shape symbol and an amount with the summation of the amounts with collected for Invoices issued.

The symbols represent the status of the Issue / Billing ratio for the Invoices associated to the Jobs rows .

Symbol Legend for the "Amount Collected" column:

-  Invoices Not Emitted
-  Invoices Totally Collected
-  Invoices Emitted Once/ Not Collected Totally
-  Invoices Emitted Twice/ Not Collected Totally
-  Invoices Emitted 3 or more Times / Not Collected Totally

- Budget Used (%): This column contains a flag shaped symbol and a value with the Profit, which is the Percentage (%) of the Job Budget used.

## Job Profit

$$Profit = \frac{\sum EmployeeTime \times Employee(Hourly Rate Multiplier)}{Budget - \sum RFP} \times 100$$

Where:

$\sum EmployeeTime$  is the Sumation of the Times (hours) that have been Inserted to the Job by the Employees

$Budget - \sum RFP$  is the difference between the Job Budget and the summation of Totals of contracted Requests For Proposal.

Legend of symbols "Budget User" column:

- ▶ Profit minor than 59%
- ▶ Profit Between 60% and 89%
- ▶ Profit greater than 90%

- Sub-Contract: This column adds up the amounts subcontracted to Subconsultants through Request For Proposal (Subconsultants Fees) that are marked as paid.

Number	Name	Job Type	Status	Client Code	Date Opened	Budget	Amount Collected	Amount Pending	Budget Used(\$)	Budget User(\$)	Sub Contract	Employee Assigned	
15-128	Freedom Baptist Church	40 Years	Not in Progress	CORITX	03/24	1,650	0	1,650	0	0	0	None	
15-133	5880 SW 74 TER	40 Years	Not in Progress	FS	03/20	5,800	0	5,800	0	0	0	None	
15-129	Pentecost Body Shop	40 Years	In Progress	CS	03/18	750	0	750	130	17	0	None	
15-127	O'Quinn Park	40 Years	Not in Progress	CITYHKA	03/17	2,300	0	2,300	0	0	0	800	
15-125	Fire Station #5	40 Years	Not in Progress	CITYHKA	03/16	1,900	0	1,900	0	0	0	200	
15-106	6985 Coral Way, Bank of America	40 Years	Submitted	GSC1	03/05	2,000	0	2,000	0	0	0	300	
15-099	Golden Glades	40 Years	Inactive	URBIE	02/20	1,450	0	1,450	0	325	38	600	
15-088	Sherandoch Gas Station	40 Years	Inactive	URBIE	02/20	1,200	0	1,200	0	325	45	500	
15-055	80 Tatum Whetstone Dr.	40 Years	Not in Progress	CTOLDC	02/04	2,400	0	2,400	0	0	0	1,100	
15-007	Oceanview Park	40 Years	In Progress	OCEPARK	01/07	18,063	0	18,063	6,125	11,938	325	2	0
14-430	437 W 41 ST	40 Years	Not in Progress	RM	11/13	1,500	0	1,500	0	0	0	0	
14-389	2222 SW 27 Ave	40 Years	Submitted	GSC1	10/21	4,000	0	4,000	0	0	0	0	
14-241	Fire Station 5500	40 Years	Inactive	CITYHKA	07/24	1,250	0	1,250	0	0	0	500	
14-240	Hawthorn Clinic	40 Years	Inactive	CITYHKA	07/24	1,600	0	1,600	0	0	0	600	

## Edit Job

In the Jobs List Table, click on the Number and automatically the Job Details window opens; see photo.

## Job Detail

## Job details and information

Job List/Edit Job: 15-005

Job Details		Overall Information	Job Schedule	Employee Time	Description of Work
Enter details of the Job below. Be mindful of mandatory fields. Number/Name: 15-005      Date: 04/04/15 Template: Architecture Type: Residential - Single Family Houses Client: Juan Carlos Perez Hernandez [Active] Owner Name: Company LLC Assigned Employee: Employee 06 A/E of Record: Elizabeth Brown Location: 3401 SW 87 Ave, Doral Unit: 2000      Measure: (Not defined.) Construction Cost: 2500000      Budget: 800000 Opening Date: 03/23/2015      Signed Date: 03/23/2015 Job Status: Not in Progress <a href="#">Update Job</a> Proposal(\$): 5,000.00      Budget Used(\$): 0.00      Profit(%): 0%      Collected: 0.00		 Drop Image Here <small>File Size: 480 x 300 px, limit 500KB, (jpg, png, gif)</small> <a href="#">imgres.jpg</a> <a href="#">Remove</a> <a href="#">Upload</a> <a href="#">Delete</a>			Each of the new luxury homes within MODERN boasts Miami Modernist Architecture, ... and gated community in the City of Doral Sector: Private Use & Occupancy: Assembly Department: Department 1 Change Orders: Lifespan: to Present

[Data Processing](#) [Publish](#) [Print Report](#)

### Overall Information

This window provides more Job information. A project image is attached, along with a job description, the sector, use & occupancy, department, change orders, and Lifespan.

Overall Information	Job Schedule	Employee Time	Description of Work
 Drop Image Here <small>File Size: 480 x 300 px, limit 500KB, (jpg, png, gif)</small> <a href="#">imgres.jpg</a> <a href="#">Remove</a> <a href="#">Upload</a> <a href="#">Delete</a>			Each of the new luxury homes within MODERN boasts Miami Modernist Architecture, ... and gated community in the City of Doral Sector: Private Use & Occupancy: Assembly Department: Department 1 Change Orders: Lifespan: to Present

### Job Schedule

Appointments Calendar by (day, week, and month), including all the appointments and meetings concerning this Job.

Double click to insert / edit job's Appointments

## Employee Time

The employee inputs the time worked, in hours, date of work and any necessary note. Add Newtime Form

## Invoices Management

- Generate Invoice (s) Schedule (%). The invoices and payment schedule are generated
- The Invoices are editable; once the work is done, the invoice is sent to the client by clicking on Email Print, and once it is collected, click Receive payment, and payment information is entered.

Invoices Management															
Invoice(s)		Select Payment Schedule		Generate Invoice(s) Schedule(%)		New 'simple charge' Invoice									
Edit	Invoice Number	Type	Date Created	Invoice Amount	Amount Due	Invoice Description		Received Payment	Emitted	Email Print	Share	Bad Debt	Billing Contact	Billing Telephone	Delete
	13-117-0001	%	05/21/13	600.00	0.00	Model D (30% Retainer)			1						
	13-117-0002	%	05/21/13	750.00	0.00	Model F (30% Retainer)			1						
	13-117-0003	%	05/21/13	1,200.00	0.00	Model D (60% Submittal)			1						
	13-117-0004	%	06/25/13	1,500.00	0.00	Model F Project Budget (\$2,500.00) 0% Due at Time of Completion of Construction Documents to Submit to the City			2						
	13-117-0005	%	08/01/13	220.00	0.00	Model D Project Budget (\$2,000.00) 10% Due at Approval of Construction Documents			1						
	13-117-0006	%	08/01/13	250.00	0.00	Model F Project Budget (\$2,500.00) 10% Due at Approval of Construction Documents			1						
				4,700.00	0.00										

## Payment(s)

- It records the amount collected, invoice number, method of payment and the amount received; they can be edited.

Payment(s)						
Edit	Invoice Number	Collected Date	Payment Method	Amount Received	Collected Notes	Delete
	13-117-0001	06/05/13	Check	600.00	check number <a href="#">1111</a>	
	13-117-0002	06/05/13	Check	750.00	check number <a href="#">1111</a>	
	13-117-0003	06/05/13	Check	1,320.00	check number <a href="#">1111</a>	
	13-117-0004	07/12/13	Check	1,500.00	check number <a href="#">1111</a>	
	13-117-0005	08/20/13	Check	220.00	Check <a href="#">1111</a>	
	13-117-0006	08/20/13	Check	290.00	Check <a href="#">1111</a>	
					4,700.00	

## Subconsultant Fees and Payments

List of RFPs hired, associated with the Job

**"New Subconsultant Fee"** Button: Allows to insert an RFP directly, simulating the process of creating an RFP, sending to the Subconsultant, Response from Subconsultant and Acceptance by the Consultant. This process allows the Administrator User to control the Expenses associated to Subconsultants in old Jobs or those which the RFP has not been processed using the **PASconcept** protocol of acceptance. To do this, the user must only use the new **"New Subconsultant Fee"** option and specify the Subconsultant and the Total. **PASconcept** generates an "automatic" RFP for that Subconsultant for the amount indicated with Status = "accepted" and assigned to the Job that is being edited.

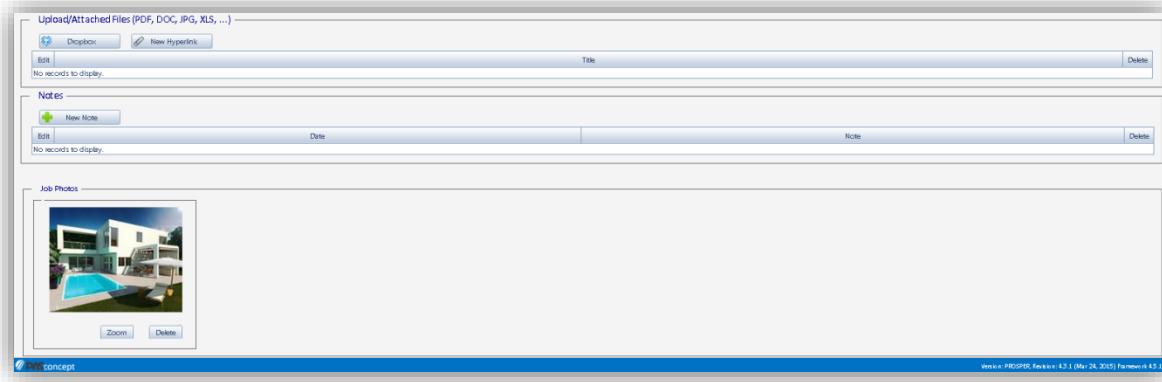
- Like the invoices, the Subconsultants Fees are editable. Once the project is collected, the Company pays to the subconsultant by clicking Pay Bill.

## Payment(s) Bill(s)

It records the Subconsultant payment. For instance, in the following screenshot,

Subconsultant Fees and Payments										
RFP Number	Discipline	Subconsultant	Project Name	Billing Contact	Total	Pay Bill	Amount Due	Print	Delete	
14-00013	Electrical Engineering	<a href="#">Gordon Harrington LLC</a>	University Trail		3,000.00		0.00			
<hr/>										
Payment(s) Bill(s)										
Edit	RFP Number	Payment Date	Payment Method	Amount Received	Payment Notes					Delete
	14-00013	07/29/14	Check	3,000.00						
<hr/>										

## Upload/Attached Files (PDF, DOC, JPG, XLS...)



### Dropbox button

Click to select a file that is stored in a Dropbox account and a link is stored in the Job.



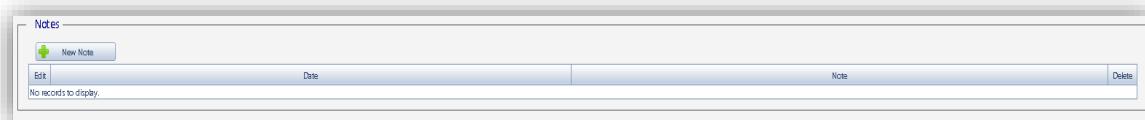
### New Hyperlink button

Click to insert a link to a file stored in the cloud, which is of interest in the Job document, adding a title and a description.



## Notes

New Note button. Click to insert a note, then it is editable; or eliminate it forever with delete..



## Job Photos

The Job photo is repeated, with the option to see it closer or permanently delete it from the Job.



## Jobs/New Job

PASconcept offers two ways to create a Job:

1. Use the Administrator User menu option "Jobs / New Job", or using the "Add New Job" button from "Jobs / Job List".

A screenshot of a software dialog box titled "Jobs/New Job". The main section is "Job Details" with the sub-instruction "Enter details of the New Job below. Be mindful of mandatory fields.". It contains the following fields:

- Job Year: 2015
- Number/Name: 15-010
- Template: (Select Template...)
- Type: (Select Job Type...)
- Client: (Select Client...)
- Owner Name: [empty]
- Assigned Employee: (Select Employee...)
- A/E of Record: (Select A/E of Record...)
- Location: [empty]
- Unit: [empty] Measure: (Not defined...) [dropdown]
- Construction Cost: [empty] Budget: [empty]
- Opening Date: 04/08/2015 [calendar icon] Signed Date: [empty] [calendar icon]

At the bottom, there is a table with four columns: "Proposal(\$)", "Budget Used(\$)", "Profit(%)", and "Collected". The values shown are:

Proposal(\$)	Budget Used(\$)	Profit(%)	Collected
0.00	0.00	0.00	0

Below the table is a "Create Job" button with a blue icon.

The Jobs created by this first way, do not have an associated Proposal, therefore, they do not complete the entire lifecycle of a project. Initially, they only have data explicitly entered on the record by the Administrator User.

2. As a result of the "Proposal Acceptance" process, PASconcept generates an associated Job, which inherits the characteristics of the original Proposal Template.

In this second case, the Job is linked to a contract (Proposal) signed by the Client, which is the recommended way to track all the Project Life Cycle.

Versions: FREE, GROW and PROSPE

## Jobs/Job Types List

**Filter:** Find, to go straight to the Job Type.

**List with (Job Type and Description),** which can be edited or deleted.

Edit	Job Type	Description	Delete
	000	Not defined	
	4PX	4 Plex	
	S1	5 Year Drainage Recertification	
	AA	Addition	
	AC	A/C Roof Top Units	
	AD	Administration	
	AJ	Air Condition Units Support	
	em	Electrical	

Add New Type: button used to add a new type of Job, where the Job Type and Description are added, as shown in the image below..

Job Type:	<input type="text"/>
Description:	<input type="text"/>
<input type="button" value="Insert"/>	<input type="button" value="Cancel"/>

## Transmittal Letter

The Transmittal Letter is a document associated to a Job, that is created when the project is finished, and it informs the Client that everything is ready, signed and sealed, so they can pick it up. The materials to be delivered may include plans, calculations, drawings, reports, inspections, CDs, etc.

## Jobs/Transmittals List

The Transmittal List includes a list of all transmittals that have been made to date. It also has a Filter Panel to search and selection with the following (Date, Status, Employee, Client and Find). With these filters it is easier and faster to find a transmittal to know whether it already exists, or if the project was already picked-up.

The table shows various types of columns with information and action (Transmittal ID, Job Name, Client Code, Date Opened, Ready Date, Pick Up Date, Transmittal Status, Budget, Pending Amount, A / E record, Ready for Pick Up, and Delete)

Jobs/Transmittals List														
<a href="#">Client Site</a> <a href="#">Employee Site</a>   Sandra Lopez   Logout														
Home	Calender	Jobs	Proposals	Billing	Clients	Subconsultants	Employees	Analytics	Departments	Others				
Date:	2015	(All Months...)	Employee:	(All Employees...)										
Status:	(All Status...)		Client:	(All Clients...)										
Find:	Additional search for Transmittal Number, Job Code & Name, Receive By, Notes, Client Name, Company...				<input type="button" value="Search"/>									
<a href="#"> Add New Transmittal</a>		<a href="#"> Print Page</a>												
Transmittal ID	Job Name				Client Code	Date Opened	Ready Date	Pick Up Date	Transmittal Status	Budget	Amount Pending	A/E of Record	Ready for Pick Up	Delete
<a href="#">14-482-T001</a>	1501 NW 97th Ave				PP	01/05	03/03	01/09	Picked Up	1,875	0	GAP	<a href="#"></a>	
<a href="#">14-454-T001</a>	Stritter Estate				DJC	01/05	03/03		Ready for Pick Up	2,400	0	GAP	<a href="#"></a>	
<a href="#">14-453-T001</a>	7725 SW 54 Ave				DJC	01/05	03/03		Ready for Pick Up	2,700	0	GAP	<a href="#"></a>	
<a href="#">14-335-T001</a>	The Mansions - Model 3 Lot 6 B 2				PPK	01/06	03/03	01/09	Picked Up	500	0	RL	<a href="#"></a>	
<a href="#">14-383-T002</a>	The Mansions Model 4 Terrace Lot 21 B 6				PPK	01/06	03/03	01/09	Picked Up	600	0	RL	<a href="#"></a>	
<a href="#">14-486-T001</a>	Costa Bella Unit 2001 C. Admin				JOSEAN	01/06	03/03		Ready for Pick Up	550	550	GAP	<a href="#"></a>	
<a href="#">14-439-T001</a>	Miami Dade Animal Shelter C. Adm				LIVSI	01/06	03/03		Ready for Pick Up	500	500	GAP	<a href="#"></a>	
<a href="#">14-424-T001</a>	Doral Modern Roof and Trellis Redesign				PPK	01/06	03/03	01/09	Picked Up	9,700	9,700	RL	<a href="#"></a>	
<a href="#">14-680-T003</a>	Central Park Revisions				PPK	01/06	03/03	01/09	Picked Up	4,550	-405	RL	<a href="#"></a>	
<a href="#">13-299-T002</a>	Tanya Sperman Residence				EDFM	01/06	03/03	01/09	Picked Up	4,000	0	RL	<a href="#"></a>	

**Transmittal ID:** Click here to edit the Transmittal.

**Add New Transmittal:** This button is used to add a new transmittal; a click here displays a window where the Job associated to the transmittal letter can be selected.



After selecting the Job, click on the insert button. The new transmittal is displayed at the end of the list.

## Edit Transmittal

Every Transmittal Letter has a Transmittal ID, including the Job number plus the transmittal number. Ex:

**Transmittal ID:** 15-097-T001

Transmittal Letter: It consists of the Job information (Client Name, Job No. & Name, A / E of Record, Status and Date Created), plus an editing table containing (Amount Copy, Package Content, Description and Signed and Sealed).

Client Name: Client Name.

Job No. & Name: Job Number and Project Name.

A / E Record: The record engineer who signed the project.

Status: Job status; if the Job is ready for pick up, Ready For Pick Up, if not ready, Not Ready, and Pick Up if already picked-up.

The screenshot shows the 'EDIT TRANSMITTAL LETTER' window with the following details:

- Transmittal ID:** 15-097-T001
- Client Name:** Joseph Robles
- Job No. & Name:** 15-097 - 4725 Orduna Drive
- Date Created:** 3/2/2015
- A/E of Record:** Raissa Lopez, P.E.
- Status:** Ready for Pick Up
- Package Table:**

Amount Copy	Package Content	Description	Signed & Sealed by	Delete
2	Response Letter	Report Signed And Seal	Yes	X
- Notes:** (empty)

**Copy Amount:** Number of copies to be delivered to the Client.

**Package Content:** Package Type, if they are calculations, drawings, plans, etc.

**Ex. of Package Content:**

The screenshot shows the 'EDIT TRANSMITTAL LETTER' window with the following details:

- Transmittal ID:** 15-097-T001
- Client Name:** Joseph Robles
- Job No. & Name:** 15-097 - 4725 Orduna Drive
- Date Created:** 3/2/2015
- A/E of Record:** Raissa Lopez, P.E.
- Status:** Ready for Pick Up
- Package Table:**

Amount Copy	Package Content	Description	Signed & Sealed by	Delete
2	Response Letter	Report Signed And Seal	Yes	X
- Notes:** (empty)

A dropdown menu is open under 'Package Content' with the following options:

- Response Letter
- (Package Not Defined...)
- Calculation
- Calculation
- CD
- Drawings
- Field Condition
- Field Condition # 1, 2, 3
- Inspection Report
- Invoice
- Original Plans
- PDF
- Response Letter
- Shop Drawings
- Soil Reports

**Description:** Package Description, if it is a report, an inspection, a model A, B or C of a house, etc.

**Signed & Sealed:** Yes or No, depending on whether the plans are signed by the Engineer

**Update:** Click the Update button to update the information in the Transmittal.

**Ready To Pick Up Notification:** Action at the end of Transmittal to email the Client a warning notice that his/her work is already completed on time and ready to pick up.

**Print Page:** Action to print a Trasmittal copy.

## Transmittal Letter/Print Page

PASconcept

Transmittal Letter

Edit   Pick Up   Print Page

# PAS Function One

11000 SW 22<sup>nd</sup> Terrace, Miami, FL 33720  
T: (305) 555-5555 F: (305) 555-5556 www.pasfunction1.com

## TRANSMITTAL LETTER

**Transmittal ID:** 13-008-T007      **Date Created:** 2/6/2015

**Client Name:** Fernando Torres      **Job No. & Name:** 13-008 May Test 01

**A/E of Record:** Employee 01      **Status:** Ready for Pick Up

Amount Copy	Package Content	Description	Signed & Sealed
3	Inspection Report	Inspection	Yes
5	Calculation	Unit 1 Model 6	Yes

**Notes:**

**Receive By:**

(Not Signed...)

**Receiver signature:**

**Pick Up Date:**

Edit   Pick Up   Print Page

This Transmittal was made & sent using PASconcept / www.pasconcept.com

## Jobs/Transmittal Package Types List

The following table enlists the different types of packages specified in the Transmittal Letter.

Add New Type: Click here to add a new type.

Jobs/Transmittal Package Types List		Client Site	Employee Site	Santa Fe City						
Home	Calendar	Jobs	Proposals	Billing	Clients	Subconsultants	Employees	Analytics	Departments	Others
<a href="#">Add New Type</a>										
Edit	Name									Delete
	Application									
	Calculation									
	CD									
	Drawings									
	Field Condition									

## Jobs/Project Classification

On this page you will find all the Jobs with they classification, with the filters (Period, Measure, Outstanding Data, Job Type, and Find)

**Jobs:** Job Number and name.

**Location:** Steering Link to Google Maps

**Open Date:** date the work was opened

**Budget:** Amount of money allocated

**Unit:** Size

**Measure:** Unit of Measure

**Latitude and longitude:** Allows to locate every Job in Analytics / Project Map menu.

**Department:** Department type. Eg. (Structural low rise, Admin Construction, Civil, etc.)

**Sector:** sector type the job belongs to, (Public, Private, etc.)

Entity Type (Government, Corporation, FBi, LLC, etc.)

**Use & SubUse:** Type of Use (Commercial, Utility Miscellaneous, Residential, etc.) and type of SubUse (depending on use, defined with one letter and one number)

**Construction Type:** Construction Type (Buildings, Residential, etc.)

**Construction SubType:** It depends on the type of construction, eg. (Buildings- Hotels, Residential- Single Family Home, etc.)

(All are editable)

Jobs/Project Classification											
Home	Calendar	Jobs	Proposals	Filing	Clients	Subconsultants	Employees	Analytics	Departments	Others	Santa Fe City
Period: 2015 (All months.)		01/01/2015	12/31/2015								
Measure: (All Measures.)				Job Type: (All Job Types.)							
Outstanding Date: (All)											
Find: Additional search for Job Number, Name or Client Name, Company											
<a href="#">Save changes</a> <a href="#">Cancel changes</a>											
Number	Name	Job Type	Unit	Measure	Latitude	Longitude	Department	Sector	Entity	Use & SubUse	Construction Type & SubType
15-125	Fire Station #5	40 Years	0	25.889769	-90.307677		Construction Administration	Public	Business - B		
15-126	2050 Rama Rd	Railing Various	0	26.08257	-90.20227		Spec. Eng. Misc. Metals	Priate	Assembly - A-3		
15-127	Bank of America Escrow	Shop Dwgts	0	25.77203	-90.18919		Structural Remodeling & Additions	Priate	Business - B		
15-128	Chase/Beau Hotel 1111 Structural Repair	Repairs	0	25.740138	-90.258798		Structural Remodeling & Additions	Priate			
15-129	SS1 Lincoln St	Railing Fence	0	26.017165	-90.194045		Spec. Eng. Misc. Metals	Priate	Residential - R-1		
15-130	RYN SNB, LLC	Shop Shop Drawings	0	26.290163	-90.089467		Spec. Eng. Misc. Metals	Priate	Residential - R-1		
15-139	Mr. & Mrs. John Lawrence	Terrace	0	26.077691	-90.298861		Structural Remodeling & Additions	Priate	Residential - R-5		
15-148	SE Financial Center Tower Additional charge	Structural Report	0	25.772222	-90.18919		Structural Low Rose	Priate			
15-157	MD Annual Shelter Field Condition # 4	Remodeling	0	25.894728	-90.329495		Structural Low Rose	Public	Utility & Miscellaneous - U		
15-158	MD Annual Shelter Field Condition # 3	Remodeling	0	25.894728	-90.329495		Structural Remodeling & Additions	Public			
15-159	Acoustical Panel Wind Calculations	Shop Dwgts	0				Spec. Eng. Misc. Metals	Public	Assembly - A-3		
15-164	Driv. In Dpool Lnd 4.5 Blk \$	Trellis	0	25.870740	-90.330057		Spec. Eng. Misc. Metals	Priate	Residential - R-1		
15-173	Chase/Beau Hotel 1211 Handrail	Shop Dwgts	0	25.739740	-90.259814		Structural Remodeling & Additions	Priate	Corporation	Residential - R-5	Building - Hotels
15-182	Swing Gate Double or Single	0	25.803000	-90.300409			Spec. Eng. Misc. Metals	Priate			
15-183	2117 Red Rd	Windows & Doors	0	25.703008	-90.287208		Spec. Eng. W & D	Priate			
15-184	1112 South St	Railing Stair	0	25.755904	-90.277624		Spec. Eng. Misc. Metals	Priate	Residential - R-1		
15-198	7955 NE 10 Ave	SPH 2 Floors Conc.	3523 Sq. Feet	25.846799	-90.171619		Structural Low Rose	Priate	Corporation	Residential - R-5	Residential - Single Family Houses
15-199	7955 NE 10 Ave	SPH 2 Floors Conc.	3523 Sq. Feet	25.846613	-90.171673		Structural Low Rose	Priate	Corporation	Residential - R-5	Residential - Single Family Houses
15-207	Brasero del Luna Sales Center	Shop Dwgts	0	25.763034	-90.148092		Spec. Eng. Misc. Metals	Priate	Corporation	Mercantil - M	Residential - Mobile Home Developments

## Proposals

A Proposal is an offer that is issued to the Client based on a specific order, with the characteristics of the project, tasks / services to be executed, including their prices, terms of payment and contractual terms and conditions.

PASconcept makes easier to create Proposals using the Proposals Types or preset Templates that allow customizing:

- Task List. A list with a detailed description of project specific tasks / services and their prices.
- Payment Schedules. Proposed payment schedule
- Introductory / Concluding Text. Text communications with the Client.
- Term & Conditions. Terms and specific contractual conditions for each type of project.

This means that creating a Proposal in PASconcept, once the system has been configured for the type of user company, it is a very simple task that involves the introduction of very little information, but the result is a comprehensive document that supplies all the details and automates recurring tasks.

Versions: FREE, GROW and PROSPER

## Proposals/New Proposal

The screenshot shows a software interface for creating a new proposal. The main title is "Proposals/New Proposal". Below it, the sub-section title is "Add New Proposal". There are seven input fields: "Proposal Name" (text box), "Proposal Template" (dropdown menu), "Sector" (dropdown menu), "Use & Occupancy" (dropdown menu), "U&O Classification" (dropdown menu), "Department" (dropdown menu), and "Prepared By" (dropdown menu). At the bottom of the form are two buttons: "Create Proposal" with a green plus sign icon and "Data Processing" with a green circular icon. The PASconcept logo is visible at the bottom left of the window.

To create a New Proposal, we must specify the "Name", "Proposal Template", "Sector", "Use & Occupancy", "Department". The remaining data can be confirmed during editing.

## Data Processing

A data processing tool to help defining Budget and Days for a new project that we are budgeting. It is available from New Proposal, Job Proposal Edit and Edit.

Using filters in the projects, based on their type and classification, we may obtain results for Minimum, Maximum and Mean Values, which allow us to limit our budget and define the risk we take when we exceed these limits, based on all historical accumulated data.

The screenshot shows an example of the Data Processing Module

**Data Processing Module**

Filter Panel		Sample Details							
		<input type="button" value="X"/> <input type="button" value="Exclude Selected"/> <input type="button" value="Include All"/>							
<input type="checkbox"/> Save Unit or Measure changes <input type="checkbox"/> Cancel changes									
	Job	Open Date	Budget	Coste	Unit	Measure	Coste by Unid	Work Days	Unit by Days
<input type="checkbox"/>	13-032 - Westminster Glass Railing	1/28/2013	1,000	1,805	300	Sq. Feet	6.02	5	361.00
<input type="checkbox"/>	12-325 - Herzfeld Residence	12/12/2012	750	250	42	Feet	5.95	1	250.00
<input type="checkbox"/>	12-170 - 3262 N.E. 166th ST	6/28/2012	1,000	275	50	Feet	5.50	2	137.50
<input type="checkbox"/>	12-097 - 325 NE 88th St	4/17/2012	1,250	1,000	65	Feet	15.38	4	250.00

<input type="checkbox"/> Save Unit or Measure changes <input type="checkbox"/> Cancel changes			
Unit of New Job:	<input type="text" value="1"/>		
<input type="button" value="Calculate Results"/>			
Historical Statistics. Sample Tested: 4 records			
	Minimum value	Average Value	Maximum Value
Budgets	\$750	\$1,000	\$1,250
Budget Used	\$250	\$833	\$1,805
Working Days	1 days	3 days	5 days
Units	42	114	300
Factor (Coste/Unit)	5.500	8.213	15.385
Factor (Days/Unit)	0.017	0.036	0.062
Estimated Result			
Budgets	\$18	\$9	\$4
Budget Used	\$6	\$7	\$6
Working Days	0 days	0 days	0 days

Version: PROSPER, Revision: 4.3.1 [Mar 24, 2015] Framework 4.5.1



The "Proposal Number" is defined in the creation process and it follows a consecutive numbering with the following format:

YY-NNNNN: Where, YY is the year and NNNNN is a consecutive number. Ex. "14-000265

## Proposals/Proposal List

Proposal Number	Proposal Template	Proposal Amount	Date Created	Project Name	Client Name	Job No.	Status	Email	Print	Share	Delete
15-00159	Structural Repairs	1,750.00	02/24/15	427 W 41 ST Structural Repairs Add. Charges	Ofer Basily		Pending				
15-00158	40 Years (with RAPO)	0.00	02/24/15	5880 SW 74 TER			Not Entered				
15-00157	Structure	3,200.00	02/24/15	Linda Lentin K-8 Center	Charles O. Nyarko, AIA	15-094	Accepted				
15-00156	Structure	2,800.00	02/24/15	Doral Modern 458 Summer Kitchen	Edgar Perez, AIA		Pending				
15-00155	Structure	5,000.00	02/24/15	271 Palm Railing	Gabriel Gineira		Not Entered				
15-00154	Structure	5,000.00	02/24/15	247 Palm Railing	Gabriel Gineira		Not Entered				
15-00153	Structure	6,000.00	02/24/15	201 Palm Railing	Gabriel Gineira		Not Entered				
15-00152	Civil On-Site	1,250.00	02/24/15	210 NOV 80th St Club	Carlos Pereira		Pending				

The Proposals List has a Filter Panel for search and selection.

It shows the most important information columns (Template, Proposal Amount, Date Created, Project Name) and Action columns (Edit Proposal on Proposal Number, Client Name, Edit Job to Job No., Status, Email / Print, Gmap and Delete).

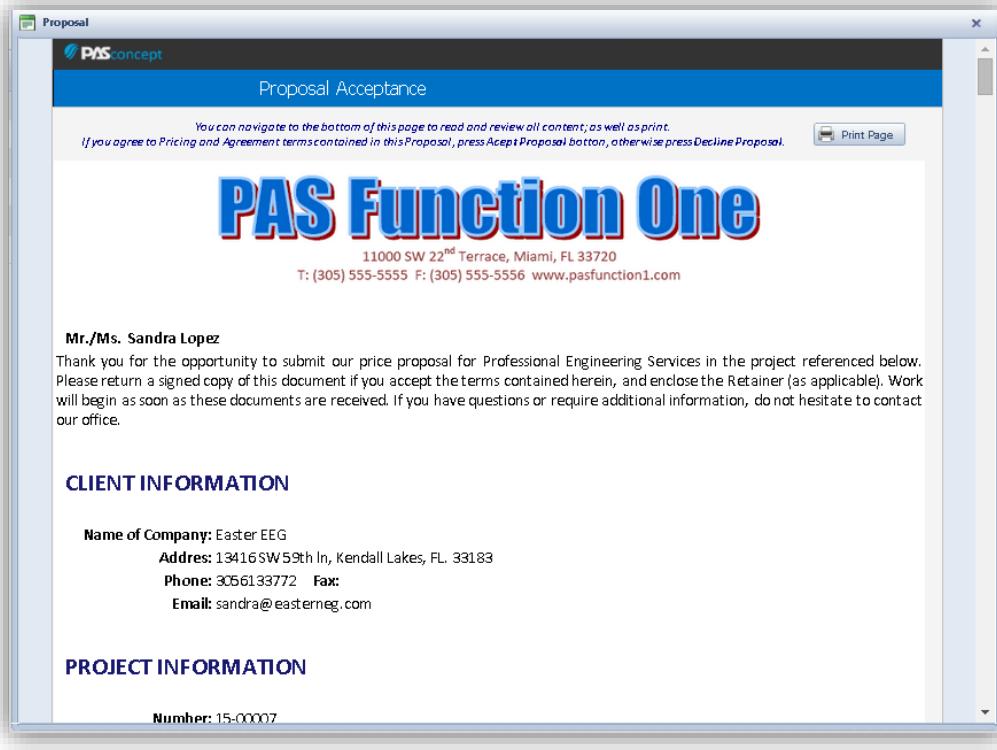
Client Name: If we Click on the the Client's name, the system displays additional contact data.



## Proposal Acceptance

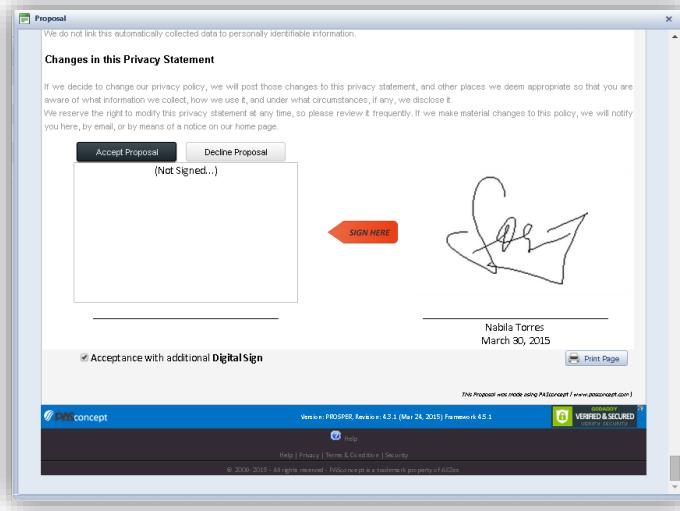
Status: The action associated to this Proposal List column, allows to change the status from "Pending" to "Accept / Decline" by the Administrator User, avoiding or replacing the Client's action from its own site. If changed to "Accepted", an associated Job is additionally created, with the inherited properties of the Proposal.

Proposal Number	Proposal Template	Proposal Amount	Date Created	Project Name	Client Name	Job No.	Status	Email	Print	Share	Delete
15-00159	Structural Repairs	1,750.00	02/24/15	427 W 41 ST Structural Repairs Add. Charges	Ofer Basily		Pending				
15-00158	40 Years (with RAPO)	0.00	02/24/15	5880 SW 74 TER			Not Entered				
15-00157	Structure	3,200.00	02/24/15	Linda Lentin K-8 Center	Charles O. Nyarko, AIA	15-094	Accepted				



## Proposal Acceptance with PASconcept Signature

The action of "Accept Proposal" may imply an additional confirmation by the Client, attaching his/her digital signature.



PASconcept Signature is designed for use from tactile devices like Tablets and SmartPhones, but it can be used from a PC, using the mouse to make the stroke of the Firm.

The registered firm is kept as an additional data of the Proposal and it is displayed on the right side of the edit page. It is also visible in the Proposal printed view , together with the date on which it was prepared.

## Proposal Issue to a Client

Email / Print: The action associated to this Proposal List column, presents an email ready to be sent to Client.

Proposal Number	Proposal Template	Proposal Amount	Date Created	Project Name	Client Name	Job No.	Status	Email	Print	Share	Delete
15-00153	Structural Repairs	1,750.00	02/24/15	437 W 41 ST Structural Repairs Add. Charges	Ofer Basaly		Pending				
15-00158	40 Years (with RAPD)	0.00	02/24/15	5000 SW 74 TER			Not Emitted				
15-00157	Structure	3,200.00	02/24/15	Linda Lentini K-8 Center	Charles O. Newark, AIA	15-004	Accepted				
15-00156	Structure	2,800.00	02/24/15	Doral Modern #5B Summer Kitchen	Edgar Perez, AIA		Pending				

To: sandra@easterneg.com

CC: sandra@easterneg.com

Subject: PASConcept: Proposal Doral Lake, Building - Hotels

Body:

Dear Sandra Lopez,

Thank you for the opportunity to submit our fee proposal for Professional Engineering services required in project Doral Lake. Our proposal document is attached, and it encloses our Agreement terms for your convenience.

[Click here to Accept and Sign Proposal](#)

Print to PDF

PROFESSIONAL SERVICES PROPOSAL

PAGE 1 OF 2

**PAS Function One**

1000 SW 22<sup>nd</sup> Terrace, Miami, FL 33172  
T: (305) 555-5555 F: (305) 555-5556 www.pasfunction1.com

Mr./Ms. Sandra Lopez

You are invited to review the attached proposal for Professional Engineering Services in the project referenced below. Please return a signed copy of this document if you accept the terms contained herein, and enclose the Retainer (as applicable). Work will begin as soon as these documents are received. If you have questions or require additional information, do not hesitate to contact our office.

**CLIENT INFORMATION**

Name of Company: Easter Egg  
Street Address: 13416 SW 59th Ln  
City: Kendall Lakes  
State: FL  
Zip Code: 33183  
Phone: 3056133772

Executing this action passes the Proposal Status from "Not Emitted" to "Pending".

Delete: The action associated to this column of Proposal List is to remove a Proposal. This action is irreversible.

## Edit Proposal

The screenshot shows the 'Edit Proposal' window for proposal number 15-00168. The main header includes buttons for Update Proposal, Delete Proposal, View/Print/Send, Save Proposal As, and Save As Template. The proposal details section shows the proposal number (15-00168), template (N.O.A.), date created (02/27/2015), prepared by (Sandra Lopez), status (Not Emitted), and email date (10/22/2014 11:32). The client information is set to 'Arjuna Calderon (IC Home Showcase)'. The introductory text is a standard acceptance notice. The 'Project Information' section contains fields for Job Type (N.O.A.), Name (NOA Series W360 (SM)), Owner Name (IC Home Showcase), Location (Miami Dade County), Area ( ), Sector (Private), Use & Occupancy (Mercantil), and Department (Spec. Eng. W & D). The 'Task Compensation' section lists a task for '101. Civil Off-Site Paving, Drainage and Striping Plans' with a quantity of 602, name 'Notice of Acceptance (NOA) for product SH660 (SM)', rates of 4,000.00, and a total of 4,000.00. The 'Payment Schedules' section has a 'Generate' button.

Editing a Proposal allows to complete the fields that are not automatically defined during its creation, such as: Location, Area, Sector, Use & Occupancy.  
All other information can also be rectified.

## Proposal Template

Once the Proposal is created, its automatic fields can be redefined by selecting a new "Proposal Template" and applying the desired changes.

## Proposal Status

The Proposal Status may be modified by the Administrator User during editing, or by the Client in its own profile. The different Status a that a Proposal may go through are:

- Not Emitted:

Newly created or incomplete Proposal. It has not been notified to Client

- Pending

Proposal ready and notified to the Client by email.

You can also go to this status by the action of the Administrator User during editing. If the Client is not a PASconcept user, the Administrator User can shift to this status without sending an email notification.

- Accepted

The Client has Accepted the terms and amounts of the Proposal.

You can also go to this status by the action of the Administrator User during editing. This circumstance is justified for several reasons:

a) The Client does not have an internet connection, so he/she cannot access his/her Proposal on-line to accept it.

b) The Client "Accepted" by other means (phone, fax) the terms of the Proposal

- Declined

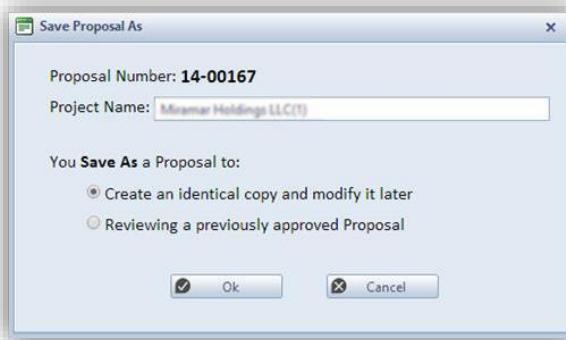
The Client does not accept the terms or amounts of the Proposal

- Revised

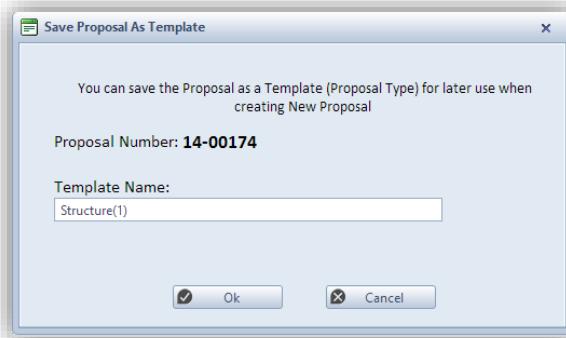
A copy of the Proposal has been created and the current one has been blocked by changes in the agreed conditions. This status can be reached by the action of the Administrator User or by the "Save As Proposal" option and selecting "Reviewing a previously approved Proposal".

### Proposal Edit Actions

- Update Proposal: Upgrade changes
- Proposal Delete: Deletes the current Proposal
- View / Print / Send, calls the Proposal Issue page , which allows official (pdf) print (PDF) or sending via email.
- Proposal Save As: Saves the current Proposal under another name, with the option of it being an "identical copy" or "Check a previously approved", the status of which would be "Not Emitted" and the Current Proposal becomes "Revised".



- Save As Template: Saves the Proposal as a New Template (Proposal Type) that can be used later to create a New Proposal with these characteristics (Task List, Schedule, Text Begin, End Text and Agreements)



## Edit Proposal/Task List

When creating a New Proposal, it inherits a Task List predefined in the Proposal Template (Proposal Type) selected.

Task List / Services referred to in the Proposal, with ID, Name, Quantity, Hours, Rates and Total columns.

Delete Task: The Action of the "Delete" column removes the row from the list.

Add New Task: To add a task not initially included, we first select in the "Select Task List" combobox and we press the "Add" button.

The available Task List, are set in the Administrator User menu option "Proposals / Proposal Task List". Each company must set up its own list, according to the Tasks and Services offered to its Clients.

Select Task:		101. Civil Off-Site Paving, Drainage and Striping Plans				Add New Task	
Task	Name	Quantity	Hours	Rates	Total	Delete	
602	Notice of Acceptance (NOA) for product SH660 (SMD)			4,000.00	4,000.00	X	
						4,000.00	

Edit Task: Although it's unusual, we can modify the text or the amounts of a row by pressing the "Task" column.

Editing task ID: 501

Name:	Structural Design, Calculations and Specifications
Eastern Engineering Group will design the structural portion of the project in question, and provide signed and sealed structural calculations and drawings as part of the scope of work.	
The structural design will cover the following general scope:	
-New 96' high storefront at main entrance: Design new columns and beams/check existing to resist wind loading. Design required mullions.	
-Dining/ Living rooms divider wall reconfiguration: Check existing columns to remain and design new ones. Check foundation for new load distribution.	
Quantity:	<input type="text"/>
Hours:	<input type="text"/>
Rates:	6,250.00
Total = [Quantity] * [Hours] * [Rates], if [Quantity] or [Hours] is blank then Total = [1] * [1] * [Rates]	
Update	Cancel

column.

## Proposal Total Calculations

The calculation formula for a row is:

$\text{Total} = [\text{Quantity}] * [\text{Hours}] * [\text{Rates}]$

If  $[\text{Quantity}]$  or  $[\text{Hours}]$  'are empty', then  $\text{Total} = [1] * [1] * [\text{Rates}]$

This means we can directly define the Total on "Rates", leaving blank the remaining columns of the expression. But we can also, optionally, specify Quantity and Hours in Task, that they are computed by quantities or services for hours.

The **Proposal Total** is the sum of totals of all the rows.

## Edit Proposal/Payment Schedule

When creating a New Proposal, it inherits a Payment Schedule predefined by the Proposal Template (Proposal Type) selected

A Proposal has up to 10 rows of containing columns that define this Schedule. The first column identifies the% (number of 1 to 100) and the second column allows a description of the concept.

Schedule	Description
30 %	Due at Time of Signed Contract Agreement in order to commence the work
60 %	Due at 100% Submittal
10 %	Due at Approval of Construction Documents

### Modify the Schedule of Payment Proposal

To change the Payment Schedule defined in the Proposal that we are editing, select an item from the list of the "Payment Schedules" combobox, which activates the "Generate" button.

The available Payment Schedules list are configured in the Administrator User menu option "Proposals / Payment Schedule List". Each company must set up its own list of Payment Schedules, according to the collection specification established for its Clients

must set up your own list of Payment Schedules, specified and established with their clients.

### Edit Proposal / Terms and Conditions

When a New Proposal is created, it inherits the "Terms and Conditions" predefined in the Proposal Template (Proposal Type) selected.

### Changing the Terms and Conditions of the Proposal

Optionally, the user editing the Proposal can directly modify the contents of the text box containing the Terms and Conditions.

You can also change it with another preset text; we select an item from the list of the "T & C Templates" combobox and activate the "Update T & C" button.

The Templates list for "Terms and Conditions" available, are customized in the Administrator User option menu "Proposals / Templates for Terms & Conditions". Each company must set up its own list of Terms and Conditions in accordance with the specifications they have established for their Clients.

### Proposal Templates (Proposal Type)

Templates for creating a New Proposal. A "Proposal Template" predefines the "Introductory Text", "Concluding Text", "Task List," the "Payment Schedule" and "Terms and Conditions", which represent 90% of the work involved in creating a Proposal.

Companies that have successfully set these Templates have the following benefits:

- Dramatic increase of productivity in the creation of New Proposals.
- Normalization / Standardization of texts, communications, Terms and Conditions and Payment Schedules.
- Reduction in preparation or calculation errors in Offers to the Clients.
- They give a serious corporate image, associated to the protocol of Proposal Acceptance / Sign.

## Requirements for creating Proposal Templates

- Create and preset "Proposal Tasks List"
- Create and preset "Terms & Conditions List"
- Create and preset "Payment Schedules List"

## Proposals/Proposal Tasks List

Edit	Task ID	Discipline	Task Name	Quantity [Hours]	Unit Price [Hours Rates]	Hour Rates Services	Delete
/	000		Administrative Fee	0	0		X
/	001	Civil Engineering	Civil On Site Paving and Drainage & Striping Plans.	0	0		X
/	002	Civil Engineering	Civil On Site Water Plans.	0	0		X
/	002	Civil Engineering	Design of Paving	1	0		X
/	003	Civil Engineering	Civil On Site Sewer Plans.	0	0		X
/	01	Electrical Engineering	Electrical Recertification	0	0		X
/	1000	Structural Engineering	Hourly Billing Rate Schedule Project Principal [Structural Engineer]	1	150		X
/	1001	Structural Engineering	Hourly Billing Rate Schedule Project Manager [Structural Engineer]	1	120		X
/	1002	Structural Engineer	Hourly Billing Rate Schedule Senior [Structural Engineer]	1	120		X

### Actions:

- Select Discipline: Changes the view to define the type of discipline and shows all the Tasks associated to discipline.
- Find: We use it to make a more specific search filter.
- Add New Task: Switches to the Insert a new row view.
- Print Page: Switches to a view to print the Proposal Tasks List
- Edit: Changes to a view for editing the columns of the row
- Delete: Deletes the row.

### Columns:

- Task ID: Task Identifier
- Discipline: Brief description or name
- Task Name: wider Description
- Hours: Default Number of Hours- Hours Rates: Default Hours Cost (in case of Services)
- Hour Rates Services: Check indicating that the row corresponds to a Service.

## Proposals/Terms & Conditions List

Add New Template		
Edit	Name	Delete
	Civil	
	40 Years (with RAPP)	
	Construction Administration	
	Structure	
	40 Years (with other Sub to Edit)	
	Shop Drawings	
	Inspections and Structural Report	
	Structural Report	

### Actions:

- Add New Template: Shifts to the view Inserting a new row
- Edit: Shifts to the view for Editing of the columns of the row.
- Delete: Deletes the row.

Structure

Edit Structure

Name: Structure

Terms & Conditions:

Claim(s). XXXXXX's services under this Proposal are performed solely for the Client's benefit and no other entity shall have any claim against XXXXXX.  
 Exclusion. The Professional Fees quoted in this agreement do not include the following: Surveying / Platting / Plan Review Fees / Permit Fees / Soil Borings / Impact Fees.  
 Certification. Projects requiring final Certification by the Engineer will not be certified by XXXXXX unless XXXXXX is contracted to observe the work in progress.  
 Inspections. Inspections are not part of this contract.  
 Limitation. The Client hereby agrees that XXXXXX's liability for this project will be limited to the amount of Professional Fees charged for the same.  
 Document Possession. Any and all plans, reports, and other such supporting documents produced as part of this project remain in the control and possession of XXXXXX.  
 Termination. XXXXXX has the sole right to terminate this Agreement with or without cause.  
 Document Submittals. This Agreement does not include submittal of the plans and applications through the agencies.  
 Liability. XXXXXX is neither responsible nor liable for the processing times at the various regulatory and permitting agencies.  
 Shop Drawings Revisions. Revisions to shop drawings prepared by XXXXXX due to field conditions are not part of.

Update Cancel

### Columns:

- Name: Name
- Terms & Conditions: Text describing the terms.

## Proposals/Payment Schedules List

Edit	Schedule Name	Values(comma-separated) List	Descriptions(comma-separated) List	Delete
	30%, 60%, 10%	30,60,10	Due at Time of Signed Contract Agreement in order to commence the work, Due at 100% Submittal, Due at Approval of Construction Documents	
	50% 50%	50,50	First Half Due at Time of Signed Contract Agreement in order to commence the work, Second Half Due at 100% Submittal	
	100%	100	{100% of Contract Amount}, Due at 100% submittal	
	30%	30	{30 % of Contract Amount} Due at Time of Signed Contract Agreement in order to commence the work.	
	60	60	{60% of Contract Amount}, Due at Time of Completion of Construction Documents to Submit to the City	
	10%	10	{10% of Contract Amount}, Due at Approval of Construction Documents	

### Actions:

- Add New Schedule: Changes to the view for Inserting a new row
- Print Page: Shifts to the view for printing the Payment Schedule List
- Edit: Changes to a View to Edit the columns of the row
- Delete: Deletes the row.

### Columns:

- Billing Schedule Name: A list of descriptive texts separated by ", ", corresponding to the Schedule rows . For instance: 30% begin, 70% end, represents two rows; 1 at 30% and other at 70%.
- Values List: List of quantities (0 to 100) separated by "," corresponding to the Schedule rows. For instance: 30, 70; represents two rows; 1 at 30% and other at 70%.
- Descriptions List: This includes payment descriptions, values, based on the two previous columns. EX.: 100%, 100 (100% Contract Amount). Due at 100% submittal.

## Proposal Template Setting

There are two ways to create a Proposal Template:

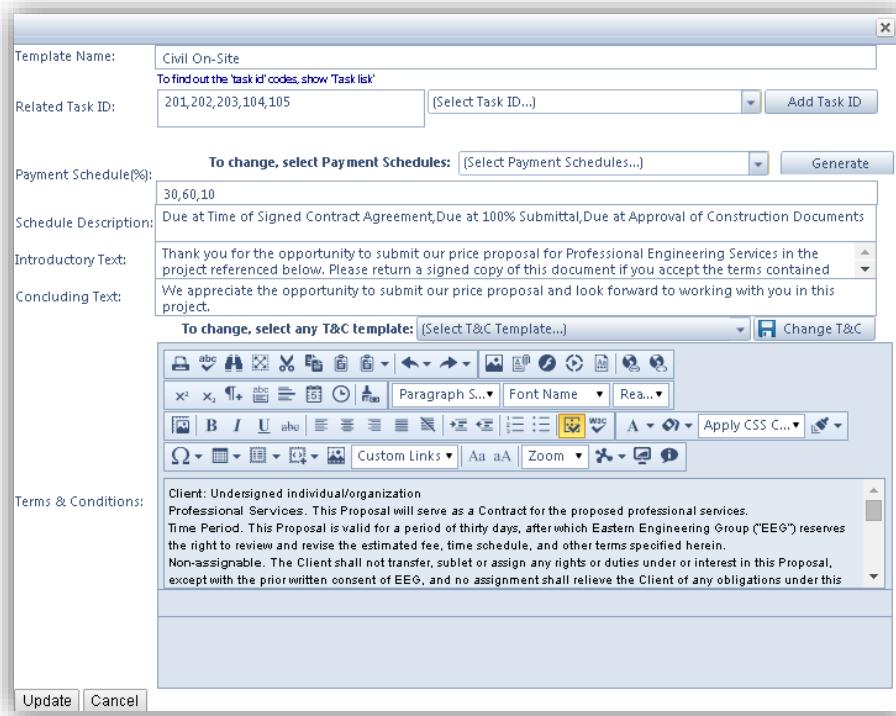
- From the Proposal Edit, using the "Save As Template" option
- Pressing "Add New Template" from Proposal / Proposal Templates Proposals/Proposal Templates

Edit	Template Name	Related Task ID	Payment Schedule(%)	Delete
	Civil On-Site	201,202,203,104,105	30,60,10	
	Civil On & Off-Site	201,202,203,104,105	30,60,10	
	40 Years (with RAPD)	401,402	50,50	
	Construction Administration With Budget Estimate	314,315,316,317,318,319		
	Railing	409,412	50,50	
	Structure	501	30,60,10	
	All Disciplines	301	30,60,10	
	Struct Certification	605	40,60	
	Threshold Building Inspections	307,308,309		
	W & D Shop Drawings	409	50,50	
	Certificate of Use	404	50,50	
	None	416	20,20	

### Actions:

- Find: To find the template faster.
- Add New Template: Shifts to the Insert a new row view
- Edit: Go to the Edit view of the columns of the row
- Delete: Deletes the row

## Edit Proposal Templates



Columns:

- **ID:** Row ID
- **Template Name:** Name of the Proposal Template (Proposal Type)
- **Related Task ID:** List of "Task ID" separated by commas.  
Each "Task ID" means a row of the Proposal Task List when we create a New Proposal using this Template. The example on the image indicates that the Proposals of Type: "Civil On-site" have 5 Tasks the IDs of which are: (201,202,203,104,105)
- **Select Task ID:** A Panel displayed with the Proposal Task List
- **Add Task ID:** To add a new Task
- **Payment Schedule (%):** A list of "% from 0-100", separated by commas.  
Each "%" means a Payment Schedule Proposal row, when we are creating a New Proposal using this Template. The example of the image indicates that the Proposals of Type "Civil On-site" have 3 Payments at 30, 60 and 10%, scheduled and calculated based on the Total.  
We can change or define a new Payment Schedule by selecting it from Payment Schedule List and pressing "Generate".
- **Schedule Description:** A list of "Schedules Description" separated by commas. Each list item describes its corresponding (%), according to the Payment Schedule (%). In the example of the image, there are three Schedule Descriptions to explain the payments conditions of 30, 60 and 10%.
- **Proposal Introductory Text:** An introductory text about the resulting Proposal.
- **Proposal Concluding Text:** A concluding text on the resulting Proposal.
- **Terms & Conditions:** A text including the Terms & Conditions for this type of Proposal.  
We can change or define a new Terms & Conditions selecting it from the Terms & Conditions List and clicking "Change T & C".

## Proposals/A/E Disciplines List

Types of disciplines and description. The table shows (Edit, Name, Description and Delete)

Name & Description: Ex.: Architect, Civil Engineering, Mechanical Engineering, etc.).

Edit: After editing the data, Click update to update the changes.

Name:	Architect
Description:	An architect is a person trained in the planning, design and oversight of the construction of buildings.

**Update** **Cancel**

Add New Discipline: Click to add a new one.

Proposals/A/E Disciplines List			
<a href="#">Home</a> <a href="#">Calendar</a> <a href="#">Jobs</a> <a href="#">Proposals</a> <a href="#">Billing</a> <a href="#">Clients</a> <a href="#">Subconsultants</a> <a href="#">Employees</a> <a href="#">Analytics</a> <a href="#">Departments</a> <a href="#">Others</a> <span style="float: right;">Client Site Employee Site <a href="#">Sanda Lopez</a> <a href="#">Logout</a></span>			
Edit	Name	Description	Delete
	Architect	An architect is a person trained in the planning, design and oversight of the construction of buildings.	
	Civil Engineering	The engineering of Paving & Drainage, Sign & Signage, Water & Sewer.	
	Cost Estimator	The Cost Estimator prepares, analyzes and verifies construction cost estimates	
	Electrical Engineering	The design of circuits that use the electromagnetic properties of electrical components such as resistors, capacitors, inductors, diodes and transistors to achieve a particular functionality.	
	Environmental Engineering	The application of engineering to the improvement and protection of the environment	
	Fire Protection Engineering	The application of engineering to protect people and environments from fire and smoke	

## Proposals /Use & Occupancy Classification

Job Use and Occupancy Classification. It's divided in Groups, as shown on the image below..

Jobs/Use & Occupancy Classification	
<a href="#">Home</a> <a href="#">Calendar</a> <a href="#">Jobs</a> <a href="#">Proposals</a> <a href="#">Billing</a> <a href="#">Clients</a> <a href="#">Subconsultants</a> <a href="#">Employees</a> <a href="#">Analytics</a> <a href="#">Departments</a> <a href="#">Others</a> <span style="float: right;">Client Site Employee Site <a href="#">Sanda Lopez</a> <a href="#">Logout</a></span>	
<b>Group A: Assembly</b>	
A-1	Assembly uses, usually with fixed seating, intended for the production and viewing of the performing arts or motion pictures. Examples: Motion picture theaters; Symphony and concert halls; Television and radio studios admitting an audience; Theaters
A-2	Assembly uses intended for food and/or drink consumption. Examples: Banquet halls; Dance halls; Night clubs; Restaurants; Taverns and bars
A-3	Assembly uses intended for worship, recreation or amusement and other assembly uses not classified elsewhere in Group A. Examples: Amusement arcades; Art galleries; Bowling alleys; Places of religious worship; Community halls; Courtrooms; Exhibition halls; Funeral parlors; Gymnasiums (without spectator seating); Indoor swimming pools (without spectator seating); Indoor tennis courts (without spectator seating); Lecture halls; Libraries; Museums; Waiting areas in transportation terminals; Pool and billiard parlors
A-4	Assembly uses intended for viewing of indoor sporting events and activities with spectator seating. Examples: Arenas; Skating rinks; Swimming pools; Tennis courts
A-5	Assembly uses intended for participation in or viewing outdoor activities Examples: Amusement park structures; Bleachers; Grandstands; Stadiums
<b>Group B: Business</b>	
B	Use of a building or structure, or a portion thereof, for office, professional or service-type transactions, including storage of records and accounts. Examples: Airport traffic control towers; Animal hospitals, kennels and pounds; Banks; Barber and beauty shops; Car wash; Civic administration; Clinics—outpatient; Dry cleaning and laundries; pick-up and delivery stations and self-service; Educational occupancies for students above the 12th grade; Electronic data processing; Laboratories—testing and research; Motor vehicle showrooms; Post offices; Print shop; Professional services (architects, attorneys, dentists, physicians, engineers, etc.); Radio and television stations; Telephone exchanges; Training and skill development not within a school or academic program
<b>Group E: Educational</b>	
E	Use of a building or structure, or a portion thereof, by six or more persons at any one time for educational purposes through the 12th grade, and day care services for more than five children older than 2½ years of age
<b>Group F: Factory &amp; Industrial</b>	
F-1	Factory industrial uses of a building or structure, or a portion thereof, for assembling, disassembling, fabricating, finishing, manufacturing, packaging, repair or processing operations of a moderate hazard occupancy that are not classified as an F-2, Group H hazardous or Group S storage occupancy. Examples: Aircraft; Appliances; Athletic equipment; Automobiles and other motor vehicles; Bakeries; Beverages; over 12-percent alcohol content; Bicycles; Boats; Brooms or brushes; Business machines; Cameras and photo equipment; Canvas and similar fabric; Carpets and rugs (includes cleaning); Clothing; Construction and agricultural machinery; Disinfectants; Dry cleaning and dyeing; Electric generation plants; Electronics; Engines (including rebuilding); Food processing; Furniture; Hemp products; Jute products; Laundries; Leather products; Machinery; Metal Millwork (wash & door); Motion pictures and television filming (without spectators); Musical instruments; Optical goods; Paper mills or products; Photographic film; Plastic products; Printing or publishing; Recreational vehicles; Refuse incineration; Shoes; Soaps and detergents; Textiles; Tobacco; Trailers; Upholstering; Wood; distillation; Woodworking (cabinet).
F-2	Factory industrial uses that involve the fabrication or manufacturing of noncombustible materials which during finishing, packing or processing do not involve a significant fire hazard. Examples: Beverages; up to and including 12-percent alcohol content; Brick and masonry; Ceramic products; Foundries; Glass products; Gypsum; Ice; Metal products (fabrication and assembly).
<b>Group H: High Hazard</b>	
H-1	Detonation hazard

# Billing

## Billing/Invoices List

**Filters:** (Date, Client, Job Status, Invoice Status, and Find) to go directly to the invoice.

The table shows all the data concerning the invoices, with action and information columns (Invoice Number, Job Name, Client Code, Date Created, Project Budget, Invoice Amount, Amount Due, Invoice Description, Email, Print, Share, Emitted, and Billing Contact)

**Print Report:** Click to print the report of all the invoices.

Billing/Invoices List											Client Site		Employee Site		Sandra Lopez	Lorena
Home	Calendar	Jobs	Proposals	Billing	Clients	Subconsultants	Employees	Analytics	Departments	Others						
Date: [All Years...]	[All Months...]			Job Status: [Active Status...]												
Client: [All Clients...]				Invoice Status: Not Collected												
Find: [Additional search for Invoice Number, Job Name, Client Name, Description...]																
<input type="button" value="Print Report"/>											Billing/Account Not Collected. Total AmountDue = \$ 208,479					
Invoice Number	Job Name	Client Code	Date Created	Project Budget	Invoice Amount	Amount Due					Invoice Description	Email	Print	Share	Emitted	Billing Contract
<a href="#">15-106-0001</a>	8585 Coral Way Bank of America	GSCI	03/11/15	2,000	2,000	2,000	(100% of Contract Amount), Due at 100% submittal				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/11/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">15-088-0001</a>	Shenandoah Gas Station	URBIE	03/11/15	1,200	1,200	1,200	(100% of Contract Amount), Due at 100% submittal				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/11/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">15-089-0001</a>	Golden Glades	URBIE	03/11/15	1,450	1,450	1,450	(100% of Contract Amount), Due at 100% submittal				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/11/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">15-075-0001</a>	247 Palm Ave Height & Beans Rev	VENSTY	03/11/15	1,500	1,500	1,500	(100% of Contract Amount), Due at 100% submittal				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/11/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">15-085-0006</a>	Wendys 8141 C. Admin	HMDARCH	03/01/15	552	255	255	Special Inspection#3 03/10/15 Wendy 8141 Roof framing, connections, Braiding, sheathing, [3 Hours x \$ 85 hours]				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/11/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">14-421-0003</a>	201 Palm Ave Construction Admin.	VENSTY	03/09/15	2,253	85	85	Request for information by the contractor regarding dissimilar information between Architectural Plans and Structural Plans [1 Hours x \$ 85 hours]				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/11/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">14-416-0001</a>	Fendi Chateau	BDINFO	03/09/15	16,350	12,262	12,262	Completion of 75% of work				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/9/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">14-452-0006</a>	Rendez Residence C. Admin	MRMGC	03/09/15	3,545	170	170	Revision of stair shop drawing. The client submitted a stair shop drawing by other and we had to review it. [2 Hours x \$ 85 hours]				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/11/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">15-085-0005</a>	Wendys 8141 C. Admin	HMDARCH	03/09/15	552	255	255	Special inspection of new wood framing connection at Wendy 8141. This inspection is partial because the connectors are not completely installed. [3 Hours x \$ 85 hours]				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/11/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">14-412-0002</a>	4520 Shopping Center C. Admin	RM	03/09/15	0	255	255	Special Inspection for Hampro Precast System. Reinforcement and Specifications [3 Hours x \$ 85 hours]				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/9/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">15-112-0002</a>	Salom Gates	JSALOM	03/09/15	750	375	375	Second Half Due at 100% Submittal				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/12/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">15-105-0001</a>	Oasis Pool Building	HOMESTE	03/06/15	750	750	750	(100% of Contract Amount), Due at 100% submittal				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/11/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">15-077-0002</a>	Beyond Dreams General Revisions	ONEDD	03/05/15	2,500	1,250	1,250	Second Half Due at 100% Submittal				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/11/2015 11:11</a>	<a href="#">+Info</a>
<a href="#">15-077-0001</a>	Beyond Dreams General Revisions	ONEDB	03/05/15	2,500	1,250	1,250	First Half Due at Time of Signed Contract Agreement in order to commence the work				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Share</a>	<a href="#">3/5/2015 11:11</a>	<a href="#">+Info</a>

Click on the Invoice Number to edit, and a link to Job Edit is displayed.

## Billing/Statements List

**Filters:** (Date, Client, and Find)

**Add New Statement:** For inserting a new statement.

Billing/Statements List											Client Site		Employee Site		Sandra Lopez	Lorena
Home	Calendar	Jobs	Proposals	Billing	Clients	Subconsultants	Employees	Analytics	Departments	Others						
Date: [2015]	[March]			Client: [All Clients...]												
Find:																
<input type="button" value="Add New Statement"/> <input type="button" value="Print Page"/>																
Statement Number	Date Created	Client Name [Company]		Amount Billed	Amount Due	Emitted	Latest Emission				Notes	Email	Print	Delete		
<a href="#">15-00023</a>	03/04/15	Charles O. Nyarko, AIA [Nyarko Architectural Group]		4,890.00	4,890.00	1	03/04/15				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Delete</a>		
<a href="#">15-00024</a>	03/04/15	Antonio Alvaro [Vault Investment Inc]		1,222.50	1,222.50	1	03/04/15				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Delete</a>		
<a href="#">15-00022</a>	03/03/15	Castiel Ginevra [Identyle LLC]		1,160.00	0.00	1	03/03/15				<a href="#">View Details</a>	<a href="#">Email</a>	<a href="#">Print</a>	<a href="#">Delete</a>		

## Edit Statement

To edit a Statement, click on the number to display the window shown on the following screenshot.

**Statement Details:** Client Name and Company.

**Date Created:** Date on which the statement was created.

**Invoices List of Statement Details:** A table with the invoices issued to Clients.

**Add Selected Invoices:** This button is used to add a new invoice to the Statement.

**Uncollected Invoices:** These are the invoices that have not yet been collected.  
Click on the checkboxes to select the invoice and add the Statement.

Editing statement ID: 1285

**Statement Details**

Statement Number: 1285	Client Name [Company]: Rendeeze Residence C. Admin	Design-Build Consultant: LBBM-Architects, LLC
Date Created: 3/24/2015	Notes: Statement notes	

**Invoices List of Statement Details**

The invoices inserted in this table are emitted with the statement. Please select the invoices from the lower table.

**Invoices Selected**

Invoice Number	Job Name	Date Created	Amount Billed	Amount Due	Notes	Delete
14-452-0005	Rendeeze Residence C. Admin	11/25/14	255.00	255.00	Telephonic Requests for information, meeting with	X
15-001-0001	2514 Fisher Island C. Admin	12/15/14	340.00	340.00	Special Inspection # 1. Reinforcement of TB-2 and	X
15-001-0002	2514 Fisher Island C. Admin	01/21/15	340.00	340.00	Inspection for sliding door installation.	X
14-212-0004	301 Caribbean Rd	02/20/15	1,000.00	1,000.00	100% Completion of work.	X
14-452-0006	Rendeeze Residence C. Admin	03/09/15	170.00	170.00	Revision of stair shop drawing. The client submitted	X
15-001-0003	2514 Fisher Island C. Admin	03/13/15	340.00	340.00	Special Inspection for Sliding door installation a	X
15-001-0004	2514 Fisher Island C. Admin	03/24/15	127.50	127.50	Coordination with Gonzalo about the as built condit	X
15-001-0005	2514 Fisher Island C. Admin	03/24/15	51.00	51.00	New Steel frame design due to as built condition (	X
8			3,082.50	3,082.50		

To add invoices to this Statement scroll down to the list of invoices pending collection to make your selection.

**Uncollected Invoices**

The invoices below have not been collected from the Client. Click on the check-boxes to select invoices for this statement.

Select by Statement Client Name  Select by Statement Client Company

Statement Number	Invoice Number	Job Name	Date Created	Amount Billed	Amount Due	Notes
No records to display.						

**Update Statement**

## Billing/Client Accounts Report

A Filter by year with the report of Client's accounts.

The report table shows the account reports for each client (Total Budget, Total Amount Collected, Total Amount Pending) along with (Client Name and Organization).

Home    Calendar    Jobs    Proposals    Billing    Clients    Subconsultants    Employees    Analytics

Year: 2015

1 of 2 Find | Next

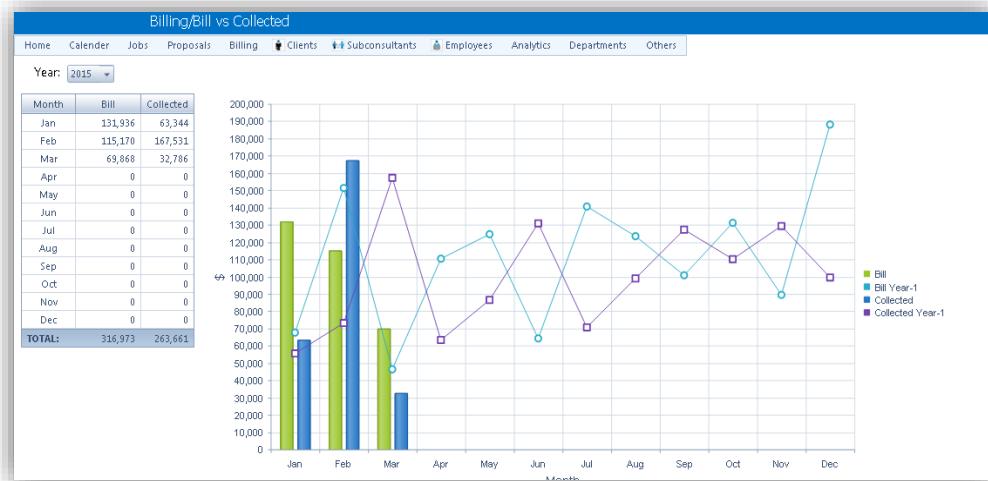
**Client Accounts Report**

Client Name	Organization	Total Budget	Total Amount Collected	Total Amount Pending
Adolfo Perez	Alutech Corporation	350	350	0
Alain Santana	AA Architecture	1,750	0	1,750
Alfredo Quirala	Home Steel Services, Inc	1,400	650	750
Anabel Aliferis	Golden Sands Contractors, Inc.	3,500	0	3,500
Anne Jackaway	Anne Jackaway Architecture, Inc.	650	650	0
Antonio o Klami	Vault Investment Inc	1,745	873	873
Benjamin Rocha	Benjamin Rocha	600	600	0
Brian M. Lally, PE	CTB Xavilation	10,007	0	10,007

## Billing / Bill vs Collected

The following graph shows the amounts billed and those pending to be collected.

By default, the data is by (Month, Bill, and Collected), showing a collected total and a pending total.



## Clients

Clients are individuals or companies receiving a Project (Jobs) in exchange for money.

**Versions:** FREE, GROW and PROSPER

### Clients / New Client

The Clients/New Client menu option leads to the page shown on the image below. The Clients are coded using preferably five acronyms that must be intuitive in order to facilitate future identification.

To create a Client, it is essential to complete "Full Name", "Client Code", "Email", "Type" and "Subtype"; the latter indicates the type of Client and its specific occupation or work.

**Versions:** FREE, GROW and PROSPER

**Clients/New Client**

Home Calender Jobs Proposals Billing Clients Subconsultants Employees Admin

**Enter New Client Details**

(\*) Full Name:

Position:

Organization:

(\*) Client Code:  Up to 7 characters

(\*) Email:  Required

Type:  (Types Not Defined...)

Subtype:  (Subtypes Not Defined...)

Full Address:  Address, City, State, Zip

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Telephone:

Cell Phone:

Faxsimile:

Web Page:

Date Created:  03/06/2015

Billing Contact:

Billing Telephone:

Notes:

## Clients/Client List

Name & Company	Client Type	Address	Email & Web	Login Details	Delete
Alfonso Sanchez, PE <a href="#">[View]</a> Plata Construction - Assistant Project Manager	Engineer	<a href="#">3212 NE 2nd Ave., Suite 600 Miami, FL 33137</a> 7866538700	<a href="#">mailto:af.sanchez@plataconstruction.com</a> <a href="http://www.plataconstruction.com">http://www.plataconstruction.com</a>		
Aaron Behrff <a href="#">[View]</a> KMR / Plata Construction Services - Principal	Architect	<a href="#">700 West 27th Street, Unit 800 - Miami, Florida 33127</a> 7864572257 7864574963	<a href="#">mailto:aaron.behrff@kmr-plata.com</a> <a href="http://www.kmr-plata.com">http://www.kmr-plata.com</a>		
Aaron Terner <a href="#">[View]</a> City of Miami Beach Capital Improvement Office	General City's	<a href="#">1200 Connection Center Drive - Miami Beach, Florida 33139</a> 3054737800 7863723333	<a href="#">mailto:aaron.terminer@miami-fl.gov</a> <a href="http://www.miamibeach.org">http://www.miamibeach.org</a>		
Abel A. Ospina, E.I. <a href="#">[View]</a> Aronson & Ospina - Project Engineer	Engineer Structural Engineer	<a href="#">3212 NE 2nd Avenue, Suite 350 - Miami, FL 33137</a> 7863629512 7862558544	<a href="#">mailto:abielospina@aronson-ospina.com</a> <a href="http://www.aronson-ospina.com">http://www.aronson-ospina.com</a>		
Abelardo Sosa <a href="#">[View]</a> Jacobs Apartments - Property Owner	Property Owner Condominium Owner	<a href="#">2951 NE 15th Terrace - Miami Lakes, Florida 33134</a> 7864649999	<a href="#">mailto:Not.provided@no-email.com</a>		
Abrilahs Armenteros <a href="#">[View]</a> Palm Aluminum and Glass - Sales Representative	Contractor Railing Contractor	<a href="#">8011 Lauderhill Boulevard, Suite C-9, Coconut Creek, FL 33073</a> 9544259172 9544259852	<a href="#">mailto:a.armenteros@palmaluminum.com</a> <a href="http://www.palmaluminum.com">http://www.palmaluminum.com</a>		

The client list has a filter panel for search and selection.

It displays the following data and action columns:

**Name & Company:** Client's full name, Code and name of the Company.

**Client Type:** Client type classification (Engineer, Contractor, Architect, etc.)

**Address:** Client's Address, and a link to Google Maps.

**Example:** A click on the address,



Automatically opens Google Maps.

**Email & Web:** Client's email and web page.

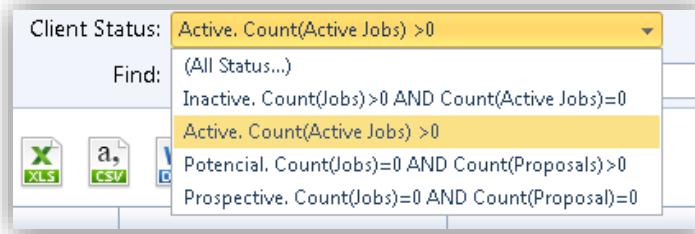
**Login Details:** Action to register the Client as a PASconcept user . An email is sent to the Client with its credentials in order to access the application (User and Password).



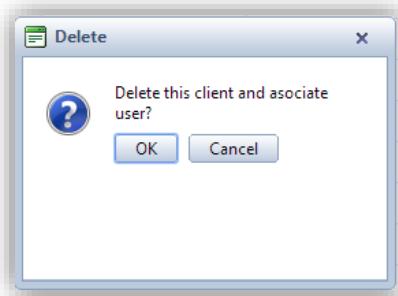
**Client Status:**

- Active Client
- Inactive Client
- Potential Client
- Prospective Client

The Client classification by their Status, allows directing group-specific marketing campaigns.

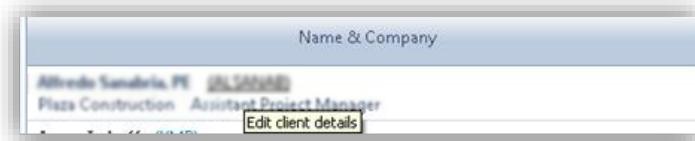


**Delete:** This action is for deleting a Client and the associated User ; this action is irreversible.



**Edit Client**

**Edit:** When we Click on the "Client Code" column, the Action for editing the Client sheet is executed.



PASconcept

Client List/Edit Client: Alfredo Sanabria, PE

Client Details	History	Schedule	Appointments																																						
<input type="button" value="Update Client"/> <input type="button" value="Send Credentials"/>																																									
<b>Client Information</b> <table border="1"> <tr><td>Client Code:</td><td>ALSANAB</td></tr> <tr><td>Name:</td><td>Alfredo Sanabria, PE</td></tr> <tr><td>Email:</td><td>mail@of-notifications.com</td></tr> <tr><td>Position:</td><td>Assistant Project Manager</td></tr> <tr><td>Organization:</td><td>Plaza Construction</td></tr> <tr><td>Type:</td><td>Engineer</td></tr> <tr><td>Subtype:</td><td>(Subtypes Not Defined...)</td></tr> <tr><td>Full Address:</td><td>Address, City, State, Zip</td></tr> <tr><td>Address Line 1:</td><td>328 NE 27th St</td></tr> <tr><td>Address Line 2:</td><td></td></tr> <tr><td>City:</td><td>Tampa, FL 33609</td></tr> <tr><td>State:</td><td>FL</td></tr> <tr><td>Zip Code:</td><td>33617</td></tr> <tr><td>Telephone:</td><td>(727) 693-0700</td></tr> <tr><td>Cell Phone:</td><td>(__)-__-____</td></tr> <tr><td>Faximile:</td><td>(__)-__-____</td></tr> <tr><td>Web Page:</td><td><a href="http://www.plazaconstruction.com">http://www.plazaconstruction.com</a></td></tr> <tr><td>Starting Date:</td><td>10/10/2014 <input type="button" value="Calendar"/></td></tr> <tr><td>Notes:</td><td></td></tr> </table>				Client Code:	ALSANAB	Name:	Alfredo Sanabria, PE	Email:	mail@of-notifications.com	Position:	Assistant Project Manager	Organization:	Plaza Construction	Type:	Engineer	Subtype:	(Subtypes Not Defined...)	Full Address:	Address, City, State, Zip	Address Line 1:	328 NE 27th St	Address Line 2:		City:	Tampa, FL 33609	State:	FL	Zip Code:	33617	Telephone:	(727) 693-0700	Cell Phone:	(__)-__-____	Faximile:	(__)-__-____	Web Page:	<a href="http://www.plazaconstruction.com">http://www.plazaconstruction.com</a>	Starting Date:	10/10/2014 <input type="button" value="Calendar"/>	Notes:	
Client Code:	ALSANAB																																								
Name:	Alfredo Sanabria, PE																																								
Email:	mail@of-notifications.com																																								
Position:	Assistant Project Manager																																								
Organization:	Plaza Construction																																								
Type:	Engineer																																								
Subtype:	(Subtypes Not Defined...)																																								
Full Address:	Address, City, State, Zip																																								
Address Line 1:	328 NE 27th St																																								
Address Line 2:																																									
City:	Tampa, FL 33609																																								
State:	FL																																								
Zip Code:	33617																																								
Telephone:	(727) 693-0700																																								
Cell Phone:	(__)-__-____																																								
Faximile:	(__)-__-____																																								
Web Page:	<a href="http://www.plazaconstruction.com">http://www.plazaconstruction.com</a>																																								
Starting Date:	10/10/2014 <input type="button" value="Calendar"/>																																								
Notes:																																									
<b>Billing Contact</b> <table border="1"> <tr><td>Name:</td><td></td></tr> <tr><td>Email:</td><td></td></tr> <tr><td>Telephone:</td><td></td></tr> </table>				Name:		Email:		Telephone:																																	
Name:																																									
Email:																																									
Telephone:																																									
<b>Notification</b> <table border="1"> <tr><td>For Invoice Emitted:</td><td><input type="checkbox"/></td></tr> <tr><td>For Invoice Collected:</td><td><input type="checkbox"/></td></tr> <tr><td>For Proposal Accepted:</td><td><input type="checkbox"/></td></tr> <tr><td>For Proposal Declined:</td><td><input type="checkbox"/></td></tr> </table>				For Invoice Emitted:	<input type="checkbox"/>	For Invoice Collected:	<input type="checkbox"/>	For Proposal Accepted:	<input type="checkbox"/>	For Proposal Declined:	<input type="checkbox"/>																														
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For Proposal Accepted:	<input type="checkbox"/>																																								
For Proposal Declined:	<input type="checkbox"/>																																								
<input type="button" value="Update Client"/>																																									

And the Tabs "Client Details", "History", "Client Scheduler" and "Appointment History Log" are shown.

The "Client Details" tab shows all the fields grouped by "Client Information", "Billing Contact and Notification".

The "Notification" Fields allow to configure if the Client receives notifications issued by PASconcept. Each Client can configure these parameters in its own profile.

The "**Update**" button confirms the changes. The "Cancel" button aborts the changes.  
The "History" tab shows all the Jobs and Proposals existing under that client.

Client List/Edit Client: Edgar Perez, AIA

Client Details		History		Schedule		Appointments		
<b>Proposals History</b>								
Proposal Number	Project Name	Proposal Template				Proposal Amount	Date Created	Job No.
15-00240	Doral Modern 75A Summer Kitchen	Structure				3,200.00	03/24/15	15-140
15-00229	Neovita Clubhouse	Structure				8,500.00	03/18/15	
15-00218	Doral Modern 75 Entry Sgarage	Structure				1,200.00	03/18/15	15-128
15-00217	Doral Modern 60 Entry Sgarage	Structure				600.00	03/18/15	15-104
15-00195	The Mansions Model 4 Lot 15-2 Revision 2	Structure				1,800.00	03/06/15	14-490
15-00173	Doral Modern 45 Entry Sgarage	Structure				1,200.00	03/02/15	15-102
15-00165	The Mansions Model 4 Lot 15-3 Revision 2	Structure				2,000.00	02/26/15	14-440
15-00156	Doral Modern 45B Summer Kitchen	Structure				2,800.00	02/24/15	
15-00134	Terra Ranches Revision	Structure				4,900.00	02/17/15	
15-00133	The Mansions Model 4 with Roof Deck Lot 1-6 Revision	Structure				3,500.00	02/17/15	15-082
15-00114	Doral Modern Clubhouse 45 Revision	Structure				950.00	02/10/15	15-071
						20,000.00	02/04/15	14-434
						602,410.00		
189								
<b>Jobs History</b>								
Number	Name	Job Type	Status	Date Opened	Budget	Amount Collected	Amount Pending	Budget Used(\$)
15-140	Doral Modern 75A Summer Kitchen	HC	Not In Progress	03/24/15	3,200.00	0.00	3,200.00	0.00
15-128	Doral Modern 75 Entry Sgarage	AM4	In Progress	03/18/15	1,200.00	0.00	1,200.00	590.00
15-104	Doral Modern 60 Entry Sgarage	AM4	Submitted	03/06/15	600.00	0.00	600.00	385.00
15-102	Doral Modern 45 Entry Sgarage	AM4	Submitted	03/02/15	1,200.00	0.00	1,200.00	1,072.50
15-093	Pain Estimator Request Fee	HW	In Progress	02/23/15	100.00	0.00	100.00	27.50
15-092	La Joya	HC	In Progress	02/23/15	4,000.00	0.00	4,000.00	440.00

The "Client Schedule" tab shows the schedule planned with the Client.

Client List/Edit Client: Edgar Perez, AIA

Client Details		History		Schedule		Appointments			
<a href="#">«</a>	<a href="#">»</a>	today	Mar, 2015	Day	Week	Month	Timeline	Multi-day	Agenda
Mon	Tue	Wed	Thu	Fri	Sat	Sun			
23	24	25	26	27	28				
2	3	4	5	6	7				
9	10	11	12	13	14				
16	17	18	19	20	21				
23	24	25	26	27	28				
30	31	01 Apr	2	3	4				

The “Appointments” tab shows, in a table, the historic calendar planned with the client..

PASconcept

Client List/Edit Client: Edgar Perez, AIA

Client Details		History		Schedule		Appointments	
Start	End	Subject	Description	Delete			
No records to display.							

## Clients/Client Types List

Client Type	Subtype	Type	Action
Architect	Art Design	Architect	X
Artist	ASB - Asbestos Certification	Architect	X
Consulting Firm	Boiler, Hot Water Heating and Steam Fitting Contractor	Contractor	X
Contractor	Building Moving/Demolition Contractor	Contractor	X
Developer	Cabinet Millwork and Finish Carpentry Contractor	Contractor	X
Distributor	Cabinet, Millwork and Finish Carpentry Contractor	Contractor	X
Engineer	Ceramic and Mosaic Tile Contractor	Contractor	X
General Contractor	Concrete Contractor	Contractor	X
Lawyer	Construction Zone Traffic Control Contractor	Contractor	X
Manufacture	Drywall Contractor	Contractor	X
Plans Runner	Earthwork and Paving Contractors	Contractor	X
Property Manager	Electrical Contractor	Contractor	X
Property Owner	Elevator Contractor	Contractor	X
Real Estate	Fencing Contractor	Contractor	X
Signs	Fire Protection Contractor	Contractor	X
Supply	Flooring and Floor Covering Contractors	Contractor	X
Surveyor and Mapper	Framing and Rough Carpentry Contractor	Contractor	X

An important way to classify Clients is by its Type and SubType. Each company specifies their Types and Subtypes. The Client Subtype depends on the Client Type.

### Client Status

PASconcept classifies the Clients according to their current or future relationship with the company.

- **Active:** Those who are currently developing projects or who did so within a short period of time.
- **Inactive:** Those who carried out their last project long time ago, and therefore, we can deduce that they passed to the competition, they are unsatisfied with the product or service, or that they no longer require the product.
- **Potential:** Those who have requested budgets in the form of Proposals, but they have not confirmed their execution (Jobs).
- **Prospective:** Those registered in the Client List, but they have not requested work or services (neither Proposals nor Jobs).

This classification is very useful, for two reasons:

Because it allows identifying Clients who are currently making purchases and that require special attention to keep them, since they are the ones generating income for the company.

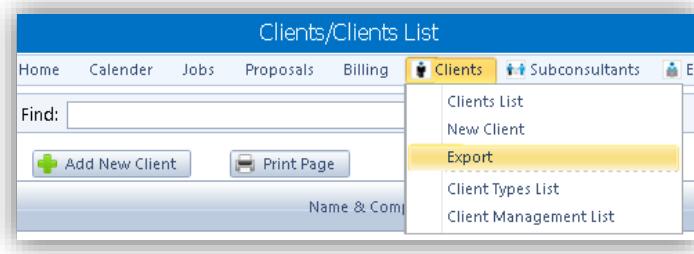
It also identifies Clients who, for some reason, are no longer buying from the company, and therefore, they require special activities to determine the causes of their absence and then try to recover them.

## Clients/Client Management

This option is focused on the company marketing. It allows selecting the Clients by Type, Subtype and Status ("Active", "Inactive", "Potential" and "Prospective"). The list resulting from the selection includes key Client contact information, such as Email, Phone or Cellular.

Export options are available (XLS, CSV or DOC) to export the resulting list to be used in marketing campaigns from specialized applications, such as MailChimp.

## Client/Export



## Export Client List

**Export:** To export Clients to an Excel table for its use outside PASconcept, for instance, in a marketing campaign, synchronization with Outlook, etc.

A screenshot of the 'Export Client List' dialog box. It contains instructions about CSV files, a section for specifying the filename ('Clients.csv'), a dropdown for the separator character ('comma (,), tab ( ), semicolon (;), or none ()), and an 'Export' button.

## Client Types List

Define Types and Subtypes of Clients, for their classification.

Example: If the Type is Contractor, the Subtype can be Electrical Contractor, General Contractor, etc.

**Clients/Client Types List**

Code	Name	Type	Subtype	Proposal Amount	Job Amount	Total Budget	Amount Due	Email	Phone	Cellular	
A1	Aires, Jennifer	Assoc AIA, Bemello, Ajendi & Partners, Inc.	Active	Contractor	General Contractor	1	1	10,000	0	jaireus@bemelloq@gmail.com	3657652233
ROMNEY	Alejandro Cenizo	Romney y familia	Active	Property Owner		15	14	34,755	2,450	RICARMEI@gmail.com	81246288
A10	Alfonso, Juan M.	Assoc AIA, Port Buckley Schuh & Jengen, Inc.	Active	Contractor	Glazing Contractor	0	1	1,000	0	jmfalcone999@gmail.com	
AGV	Ara Gómez	AGV Venture	Active	Architect		1	1	15,600	0	ajventure@gmail.com	
ANATR	Ara Trigilio	Ara Trigilio Emprendedora y heredosa	Active	Architect		13	14	17,580	1,200	ANATR9@gmail.com	55554729
TRADH	Anabela Dominguez	Tradición Hipermercados	Active	Architect		10	7	6,235	1,400	TRADH@gmail.com	1111552147
GOIBI	André Fonscada	Gourmet Lanchonetes	Active	Architect		18	7	4,440	250	GOIBI@GMAIL.COM	11115442

## Client Management

**Clients/Client Management:** Includes the Filters (Type Client, Client Status, Subtype Client, Client Balance), and the Find button.

It has options to export (XLS, DOC, and CSV format)



**Client Management:** It summarizes all the Client's data in one table (Code, Name, Organization, Status, Type, Subtype, Proposal Amount, Job Amount, Total Budget, Amount Due, Email, Phone, Cellular).

**Clients/Client Management**

Code	Name	Organization	Status	Type	Subtype	Proposal Amount	Job Amount	Total Budget	Amount Due	Email	Phone	Cellular
A1	Aires, Jennifer	Assoc AIA, Bemello, Ajendi & Partners, Inc.	Active	Contractor	General Contractor	1	1	10,000	0	jaireus@bemelloq@gmail.com	3657652233	
ROMNEY	Alejandro Cenizo	Romney y familia	Active	Property Owner		15	14	34,755	2,450	RICARMEI@gmail.com	81246288	
A10	Alfonso, Juan M.	Assoc AIA, Port Buckley Schuh & Jengen, Inc.	Active	Contractor	Glazing Contractor	0	1	1,000	0	jmfalcone999@gmail.com		
AGV	Ara Gómez	AGV Venture	Active	Architect		1	1	15,600	0	ajventure@gmail.com		
ANATR	Ara Trigilio	Ara Trigilio Emprendedora y heredosa	Active	Architect		13	14	17,580	1,200	ANATR9@gmail.com	55554729	
TRADH	Anabela Dominguez	Tradición Hipermercados	Active	Architect		10	7	6,235	1,400	TRADH@gmail.com	1111552147	
GOIBI	André Fonscada	Gourmet Lanchonetes	Active	Architect		18	7	4,440	250	GOIBI@GMAIL.COM	11115442	

**Example:** Export List to Excel File Format.

Code	Name	Organization	Status	Type	Subtype	Proposal Amount	Job Amount	Total Budget	Amount Due	Email	Phone	Cellular	
2	PALM	Násham Armenteros	Palm Aluminum and Glass	Active	Contractor	Railing Contractor	6	4	8100.00	0.00	armenteros@palmaluminum.com	9544218572	954629952
3	TERAA	Adam Adler	Terra Group	Active	Developer	Construction	2	2	3665.00	1445.00	adler@terragroup.com	3090000000	
4	AUTECH	Adolfo Pérez	Kulitech Corporation	Active	Manufacture	Windows & Doors Manufacture	7	7	4300.00	0.00	adolfo854@gmail.com	3059832080	
5	KING	Agustín E. Maristany, P.E.	King Engineering	Active	Engineer	Mechanical, Electrical & Plumbing Engineer (MEP)	5	3	7340.00	297.00	maristany@kingengineering.com	3059829979	3058076068
6	ALAINSA	Alain Santana	AA Architecture	Active	Architect		7	13	19990.00	6430.00	asantana786@gmail.com	786242495	7862777165
7	AUGLAS	Alejandro Redondo	AAA GLASS	Active	Contractor	Glazing Contractor	1	1	1250.00	0.00	alebavila@yahoo.com		7863991542
8	HOMESTE	Alfredo Quirala	Home Steel Services, Inc.	Active	Contractor	Railing Contractor	4	4	3250.00	0.00	homesteelservice@yahoo.com	7863989572	
9	GSCI	Andrés Ariño	Golden Sands Contractors, Inc.	Active	Contractor	General Contractor	10	5	17055.00	0.00	ariño10@gsands.net	3098333398	3095278837
10	ANDREWG	Andrew Guesch	Suffolk Construction Company	Active			1	1	10000.00	10000.00	aguesch@suffolk.com	3054984769	7865104393
11	ACB2	Antonio Acevedo P.E.	ACB2 Engineering, Inc.	Active	Engineer	Civil Engineer	29	14	11640.00	0.00	antonio.ace@comcast.net	9544503219	7862867574
12	VAULTIN	Antonio Kiani	Vault Investment Inc.	Active	Developer		1	3	13745.00	1223.00	director@vaultinc.com	7863901712	
13	RCHOMAC	Arturo Calderon	AC Home Showcase	Active	Manufacture		12	10	47500.00	0.00	aca1deron@chomeshowcase.com	3059826214	

## Subconsultants

The Subconsultants menu provides the filters (Date, Subconsultant, Discipline, Status and Find).

Click on **Add New Request for Proposal** to add a new Subconsultant.

Complete all data and click Update to update.

Subconsultants/New Request for Proposals

Home Calendar Jobs Proposals Billing Clients Subconsultants Employees Analytics Departments Other

Discipline and Subconsultants

To view the list of related Subconsultants below, select One Discipline.  
(If you select other discipline you can add more Subconsultants)

Select the discipline:

Select the recipient of this RFP by transferring Subconsultants names from the left panel to the right:

Aristides Reyes Gavilan	<input type="button" value="&lt;"/>
Carlos Rodriguez P.E.	<input type="button" value="&gt;"/>
Fernando Accue, PE.	<input type="button" value="&lt;&gt;"/>
Fernando Torres	<input type="button" value="Up"/>
Gilia Rodriguez	<input type="button" value="Down"/>
Iolina Vallejo	<input type="button" value="X"/>

Request for Proposal Details

Sender: Sandra Lopez  
Date: 03/12/2015

Introductory Text: Our firm invites you to bid for a portion of the project referenced in the attached Request for Proposals. If you are interested, please submit your response and do not hesitate to contact our office at any time with questions you may have.

Project Information

Project Name:   
Project Location:   
Project Area:   
Description:

Upload/attached files (PDF, DOC, JPG, XLS, ...)

New Hyperlink  Title   
No records to display.

Payment Schedules

To change, select Payment Schedules:  Generate

Term & Conditions

40 Years (Only EEG)

Confirm and Notification

Send this notice to each Subconsultants selected by discipline

Subject:   
Body:  

Dear [Subconsultant Name]

This email is part of a gratuity service from the project administrations that PASconcept provides. It will allow you to respond to your client [PASconcept User] the solicitation of Request for Proposals for the project [Project Name]

To access PASconcept [click here](#)

Use the following credentials to access the application:

## Subconsultants/Request for Proposals List

This table shows data and action columns (RFP Number, Job Name, Subconsultant Name, Discipline, Fee, Date, Job Number, Status & Send, Print, and Delete).

**RFP Number:** Number of the Request for Proposal, click to edit.

**Job Name:** Job name.

**Subconsultant Name:** Subconsultant Name.

**Discipline:** Engineer type (Architect, Mechanical, Software Engineering, etc.).

**Date:** Date on which the Proposal was created.

**Status & Send:** This shows whether the Proposal is accepted or pending to be accepted by the Subconsultant.

**Print:** Click here to print the contract.

**Delete:** Click to delete.

RFP Number	Job Name	Subconsultant Name	Discipline	Fee	Date	Job Number	Status & Send	Print	Delete
15-00010	Fire Station #5	Carlos Rodriguez P.E.		0.00	03/10/15		Pending		
15-00099	Freedom Baptist Church	Carlos Rodriguez P.E.		0.00	03/09/15		Pending		
15-00088	8585 Coral Way Bank of America	Carlos Rodriguez P.E.		0.00	03/04/15		Pending		
15-00097	Doral Multiple Use Mechanical and Electrical/Mechanical Report	Carlos Rodriguez P.E.		0.00	03/03/15		Pending		
15-00084	O'Connor Park	Carlos Rodriguez P.E.		0.00	03/02/15		Pending		

## Subconsultants/Subconsultants List

**Filter:** Find to go directly to Subconsultant, typing its name.

The Table shows data and action columns (Name & Company, Address, Email & Web, Logging Details and Delete).

**Name & Company:** Company name and Subconsultant name; click to edit.

**Address:** Address and phone numbers, with a link to Google Maps.

**Email & Web:** Email and Web with a Link for sending Email, and Website.

**Logging Details:** To send via email the PASconcept credentials, once the Subconsultant has accepted the Proposal.

**Delete:** Click to remove Subconsultant.

Subconsultants/Subconsultants List						<a href="#">Client Site</a>	<a href="#">Employee Site</a>	<a href="#">Logout</a>
<a href="#">Home</a>   <a href="#">Calendar</a>   <a href="#">Jobs</a>   <a href="#">Proposals</a>   <a href="#">Billing</a>   <a href="#">Clients</a>   <a href="#">Subconsultants</a>   <a href="#">Employees</a>   <a href="#">Analytics</a>   <a href="#">Departments</a>   <a href="#">Others</a>								
<input type="text" value="Find"/> <a href="#">Add New Subconsultant</a> <a href="#">Print Page</a>		<input type="button" value="Search"/>						
Name & Company	Address	Email & Web	Login Details	Delete				
Amilides Rezzos Gutiérrez (RGR) Reyes-Gutiérrez Consulting Engineers, Inc. President	52152 Hwy 79th Avenue - Miami Lakes, Fl. 33164 3059299444 - 790267726	rezzos@reyzgut.com						
Carmen Rodriguez P.A. (CRD) Rodriguez & Angulo Professional Design, Principal	52735 Hwy 42 Torrance - Miami, Fl. 33175 3052229950 - 3052007922	cmr.read@yahoo.com						
Diana Fernández (DF) G&G Building Solutions,Inc.	5200 Hwy 47th Torrance - Hollywood, Fl. 33024 3059367174 - 3057373397	dfernandez@solucionesg.com						
Fernando Ayala, PE. (FAD) A.E.D. Consulting Engineers, Inc.	4705 207 143 Avenue - Miami, Fl. 33175 3052581574 - 7865326483	fernando.ayala@aed.com						
Fernando Taveras (FAT) Taveras Engineering, Inc.	P.O. Box 22-4545 - Miami, Fl. 33122 3054634444 - 3053124537	fernando.taveras@taveras.com						
Gilda Rodriguez (GR) UCL Engineering - Project Manager	5242 201 73rd Street - Miami, Fl. 33155 3054343688 - 3053124537	grodrioz@ucl.com http://www.ucl.com						
Isidra Valdes (IDV)	---							
Jorge Matheus (JMF) Elite Contract Services, LLC	57053 Hwy 47th Pl. - Miami, Fl. 33164 3053404980 - 3053404989	jmatheus12@gmail.com						
Juan Pablo Fernández (JPF) Aces - Principal	Av. Calle 100, Col. Lomas de Chapultepec, Col. Chapultepec, CDMX 11000 3059404132 - 3059404132	jpfernandez@aces.com http://www.aces.com						
Miguel Collado (MC) General Pdftension & Engineering Services, Inc.	2511 30th 74 Ave - Miami, Fl. 33172 3054394755 - 3054067816	mc@generalpdftension.com						

## Subconsultants/New Subconsultant

To enter a new Subconsultant it is necessary to complete with all data the following fields (Full Name, Discipline, Position, Organization, Subconsultant Code, Email, Full Address, Address line1, Address line2, City, State, Zip Code, Telephone, Cell Phone, Facsimile, web Page, Date Created, Billing Contact, Billing Telephone, and Notes). Click on Add New Subconsultant and a new Subconsultant is logged in.

Enter New Subconsultant Details

	<div style="margin-bottom: 10px;"> <span style="color: #0070C0;">(*)</span> Full Name: <input style="width: 200px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> <span style="color: red;">Required</span> </div> <div> <span style="color: #0070C0;">(*)</span> Discipline: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Position: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Organization: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Subconsultant Code: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> <span style="color: #0070C0;">(Up to 5 characters)</span> </div> <div> <span style="color: #0070C0;">(*)</span> Email: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> <span style="color: red;">Required</span> </div> <div> <span style="color: #0070C0;">(*)</span> Full Address: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Address Line 1: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Address Line 2: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> City: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> State: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Zip Code: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Telephone: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Cell Phone: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Facsimile: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Web Page: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Date Created: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> <input type="button" value="Calendar"/> </div> <div> <span style="color: #0070C0;">(*)</span> Billing Contact: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Billing Telephone: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div> <span style="color: #0070C0;">(*)</span> Notes: <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 3px; padding: 2px 5px; font-size: 8pt; margin-right: 10px;" type="text"/> </div> <div style="text-align: center; margin-top: 10px;"> <input style="border: 1px solid #0070C0; border-radius: 3px; padding: 2px 10px; font-weight: bold; color: #0070C0; background-color: white; font-size: 8pt; margin-right: 10px;" type="button" value="Add New Subconsultant"/> <input style="border: 1px solid #ccc; border-radius: 3px; padding: 2px 10px; font-weight: bold; color: black; background-color: white; font-size: 8pt;" type="button" value="Cancel"/> </div>
--	---

## Employees

The employees menu has the submenus (Employee List, New Employee, Time Entries List, List Calendar Payroll, Time Sheet, Times by Periods, Employees Efficiency Chart and Time Sheet Report).

Name & Company	Address	Inactive	Login Details	Admin	Delete
Alexander Feuer, (MOROK) Marketing Assistant alexanderfeuer@gmail.com	100 King George - London, W9K 0P9 07705560297 07705513373	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>
Ana Gonzalez, (AG) Test ana.gonzales@eastc.com	—	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>
Ann Devon, (EASTC) Sales Agent anndevon@eastc.com	20 King George - London, W9K 0P9 07705513373 07705511111	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>
Annette Knott, (EAMAN) Sales Manager annette.knott@eastc.com	20 King George - London, W9K 0P9 07705513373 07705511111	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>
Carine Schafft, (PRAND) Marketing Manager carine.schafft@eastc.com	54, rue Ruyse - Nantes, 44000 097221373 097221274	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>
Dominique Perier, (SPECI) Marketing Manager dominique.perier@eastc.com	29 Rue Jeanne d'Arc - Paris, 75009 047198600 047198609	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>
Elizabeth Bowen, (COCHE) Sales Representative elizabeth.bowen@eastc.com	Buckley Gardens 12 Broadway - London, W1U 6LT	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>

To create an Employee User it is imperative to input "Name", "Employee Code" and "Email". If you check "Is User Administrator", it inherits permissions to work in the Administrator Portal. Otherwise, access is limited basically to the Employee Portal with restricted options and oriented mainly to "Insert New Job Time"

**Versions:** GROW and PROSPER

## Employees/Employee List

Edit	Full Name	Position	Employee Code	Home Telephone	Cell Phone	Email	Inactive	Login Details	Admin	Delete
	Alexander Feuer	Marketing Assistant	MOROK	(056) 202-3176	(056) 202-3176	MOROK@gmail.com	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>
	Ana Gonzalez	Test	AG	(056) 202-3176	(056) 202-3176	ana.gonzales@eastc.com	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>
	Ann Devon	Sales Agent	EASTC	(171) 555-0287	(171) 555-3373	EASTC@gmail.com	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>
	Annette Knott	Sales Manager	EAMAN	(171) 555-0287	(171) 555-3373	EAMAN@gmail.com	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> + Admin	<input type="checkbox"/>

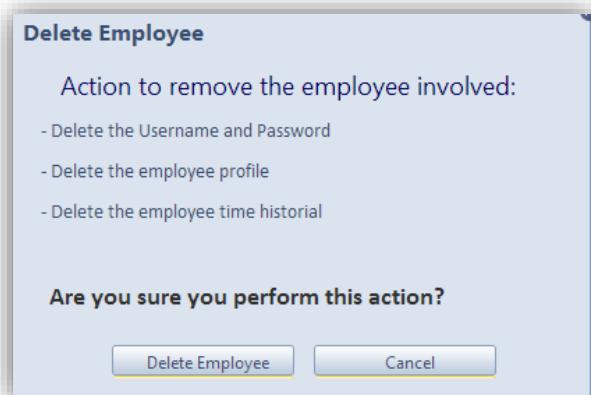
The Employees list has a Filter Panel for search and selection, where the status can be changed, , allowing to define whether the Client is (Active) (Inactive) or (All employees).

It shows the most important Data columns (Full Name, Position, Employee Code, Home Telephone, Cell Phone, Email, and Inactive) and the Action columns (Edit, Login Details, Admin, Delete). It is explained below.

**Login Details:** An action to register an Employee as a PASconcept user. An email with his/her credentials (user and password) is sent to the Employee in order to allow his/her access to the application.

**Admin:** An Action to define the Employee's privileges. "+ Admin", to permit "Administrator" privileges and give access to the "Administrator" and Employee profiles. "-Admin", to limit access only to the Employee Profile.

**Delete:** This action is to eliminate an Employee



When we confirm this Action, the application indicates that the Employee and his entire system history will be permanently deleted. This action is irreversible.

**Edit:** Action for editing the Employee Tab

### Edit Employee

A screenshot of a "View/Edit Employee" form for Alexander Feuer. The form contains the following fields:

- Full Name: Alexander Feuer
- Position: Marketing Assistant
- Employee Code: MORGK
- Address Line 1: Heerstr. 22
- Address Line 2:
- City: Leipzig
- State:
- Zip Code: 04179
- Home Telephone: (034) 202-3176
- Cell Phone: (034) 202-3176
- Email: MORGK@gmail.com
- Starting Date: 12/22/2011
- Hourly Rate Multiplier: 80
- SSN:
- DOB:
- Notes:
- Inactive:
- Inactive Date:

At the bottom are "Update" and "Cancel" buttons.

When editing an Employee's file, all the available fields are displayed.

**Hourly Rate Multiplier:** It's a concept used by A/E companies for controlling Project Indirect Costs and Hourly Wage Costs. This factor is multiplied by each hour inserted into JobTime by the Employee and it affects the profitability balance of a Job, which is calculated using the expression:

**(Job Budget) - HRM x Time (hours)**

**Inactive:** the Employee Status. If you activate "Inactive", the date is recorded and the Employee login to the system is disabled. It is good practice to pass the Employees to Inactive instead of removing (Deleting) them, so that the "Employee Live" keep the line.

The "Update" button confirms the changes. The "**Cancel**" button aborts the changes.

## [Employee list](#)

**Employee List:** A list of employees with data columns (Name & Company, Department, Address, Inactive, Login, Admin and Delete) and the Status and Find filters, for an easier employee search.

### Filters

**Status:** Defines whether the Employee is active or Inactive.

**Find:** Employee's Name

### Columns

**Name & Company:** Employee name, email, and occupation.

**Department:** Department.

**Address:** Home address and telephone.

**Inactive:** This button is to inactivate an employee; if you click your login is disabled.

**Login Details:** Used to send the Pasconcept credentials to a new employee.

**Admin:** Defines the privileges for the employee.

**Delete:** Permanently removes the employee.

## [Add New Employee](#)

To add a new employee, click the Add New Employee button.



Fields marked with \* (Full Name, Employee Code, and Email) are required.

Upon registering the Employee, it must be defined whether the User will be an Administrator or not..

Employees/New Employee

Home Calender Jobs Proposals Billing Clients Subconsultants Employees

**Enter New Employee Details**



(\*) Full Name:  Required

Position:

(\*) Employee Code:  Up to 5 characters

(\*) Email:  Required

Full Address:  Address, City, State, Zip

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Home Telephone:

Cell Phone:

SSN:

DOB:  

Starting Date:  

Billing Rate:  0

Notes:

Is user  "Administrator"?:

 Add New Employee  Cancel

## Employee/Vacation Schedule

This tab displays the vacation calendar for all the Employees of the company. The Employee's vacation are recorded by inserting an Appointment with Activity Type: Vacation, at the Home Page of the Administrator Profile.

## Employee/Live

It graphically reflects the life of all the Employees, since their register in the system until today, or until the date on which they were passed to the "Inactive" status.

**Print Page:** A button available in the Employee List, to print the employee list.



## Employees/ Time Entries List

List of employee hours, with search filters (Date, Employee, Job, and Client) and the data and action columns (Edit, Employee Name, Job Number, Date of Work, Date of Entry, Time Hrs, and Description).

The Time Entry records are entered by the Employee on the Employee Site.

**Edit:** Allows to Edit all the information entered by the Employee.

Example:



Date of Work:	3/31/2011
Date of Entry:	4/1/2011
Time (hrs):	5.5
Category:	(Select Time Sheet Category...)
Description:	Drawing detail of parapet on roof framing plan and on S-5, coordination with architect about position of RTU, design of RB-1 and columns supporting it, column bar arrangement and column schedule.

**Job Number:** Number assigned to the Job.

**Date of Work:** Date of work.

**Date of Entry:** Date of Entry.

**Time (Hrs):** Number of hours used.

**Description:** Job Description

Employee Name	Job Number	Date of Work	Date of Entry	Time (hrs)	Description
Fernando Torres	14-506	10/28/14	10/28/14	1.0	Test for Hourly Rate [Field Condition]: bbbbb
Fernando Torres	14-506	10/27/14	10/27/14	2.0	gdfsghj

## Employee/Payroll Calendar

Employee payment calendar.

**New Date:** First, we enter the date of payment, and then we click on the Insert button to insert it. The Payroll Closing Date is defined from fortnight to fortnight.

The screenshot shows a software interface titled "Employees/Payroll Calendar". At the top, there is a navigation bar with links: Home, Calender, Jobs, Proposals, Billing, Clients, Subconsultants, Employees, Analytics, Departments, and Others. Below the navigation bar, there is a search field labeled "New Date: Payroll Closing Date" with a calendar icon and an "Insert" button. A table below the search field lists several dates with red "X" marks next to them, indicating they are closed or deleted. The dates listed are: 6/24/2016, 6/10/2016, 5/27/2016, 5/13/2016, 4/29/2016, 4/15/2016, 4/1/2016, and 3/18/2016.

## Employee/ Timesheet

Total hours accumulated by the employees during a two-week period, entered associated to a Project Name.

The screenshot shows a software interface titled "Employees/Timesheet". At the top, there is a navigation bar with links: Home, Calender, Jobs, Proposals, Billing, Clients, Subconsultants, Employees, Analytics, Departments, and Others. Below the navigation bar, there are fields for "From: 02/21/2015" and "To: 03/06/2015", and a dropdown for "Employee: Dalgur Lara". There are also "Previous" and "Next" buttons. The main area is a grid titled "February -- March" showing hours worked for various projects. The columns represent dates from Feb 21 to Mar 04. The rows list projects such as "1710 SW 27th Ave", "300 Redwood", "Century Gardens IV Repeat Fee", "Crespi Apartment Building and Marina", "Doral Modern 45 Entry Signage", "Doral Modern 68 Entry Signage", "Doral Modern Roof and Trellis Redesign", "Doral Palms North Guardhouse", "Hialeah Church of Christ", "La Joya", "Linda Lenin K-8 Center", "Palms Estates Repeat Fee", "Rickenbacker ATCT Const. Admin.", "The Mansions - Model 5 Lot 1 B 2", and "The Mansions Model 4 Lot 13-6". The grid shows hours worked for each project per day, with totals at the bottom of each column.

## Employee/ Time by Periods

Filters (by periods, by months, by years)

Total Employees Hours classified by type

Production: (Jobs and Over Time)

Administrative: (Administration, Accounting, Marketing)

Benefits: (Sick, Vacation, Holiday, Personal)

## By Periods

Employee	Total	Production		Administrative			Benefits			
		Jobs	Overtime	Administration	Accounting	Marketing	Sick	Vacation	Holiday	Personal
Aguilar, Alaym	80.5	73.0	7.5							
Barros, Maikel	80.0	79.3	0.7							
Calle, Esther	80.0	32.0								
Ching, Denayse	80.0	77.0	3.0							
Fernandez, Judith	80.0	79.0	1.0							
Garo, Michel	74.0	64.5	5.5							
Gonzalez, Alberto G.	80.0	80.0								
Gonzalez, Hades	62.0	62.0								
Infranzon, Anoland	13.0		13.0							
Lara, Delgiz	80.0	79.3	0.7							
Lopez, Jennifer	80.0		80.0							
Lopez, Sandra	80.0		80.0							
Lozada, Luis M.	80.0	79.3	0.7							
Martinez, Julio	64.0	64.0								
Martinez, E.I., Alexis	72.0	67.0	1.0							
Morilla, Jorge	80.0	77.0	3.0							
Parra, Hugo	74.0	74.0								
	1,239.5	987.4	0.0	196.1	0.0	3.0	0.0	40.0	0.0	9.0

## By Months

Employee	Total	Production		Administrative			Benefits			
		Jobs	Overtime	Administration	Accounting	Marketing	Sick	Vacation	Holiday	Personal
Aguilar, Alaym	160.5	145.0	5.5	4.5						
Barros, Maikel	160.0	159.0	1.0							
Calle, Esther	160.0	151.0	1.0							
Ching, Denayse	160.0	146.0	8.0							
Fernandez, Judith	160.0	159.5								0.5
Garo, Michel	160.0	144.0	12.5							
Gonzalez, Alberto G.	160.0	159.0	1.0							
Gonzalez, Hades	160.0	100.0								
Infranzon, Anoland	28.5		24.5	4.0						
Lara, Delgiz	160.0	142.5	1.5				8.0	8.0		
Lopez, Jennifer	160.0		141.0				19.0			
Lopez, Sandra	160.0		152.0					8.0		
Lozada, Luis M.	154.0	153.0	1.0							
Martinez, Julio	160.0	157.5	1.5	1.0						
Martinez, E.I., Alexis	160.0	158.0	1.0							1.0
Morales, Maris	2.5	2.5								
Morilla, Jorge	160.0	134.5	23.5				2.0			
Parra, Hugo	163.0	155.5	2.5							3.0
	2,528.5	2,047.0	0.0	317.5	9.5	2.0	27.0	16.0	0.0	26.0

## By Years

Employee	Total	Production		Administrative			Benefits			
		Jobs	Overtime	Administration	Accounting	Marketing	Sick	Vacation	Holiday	Personal
Aguilar, Alaym	152.0	110.5	28.5	13.0						
Barros, Maikel	2,080.0	1,924.0	16.0	3.0				36.5	80.0	19.0
Calle, Esther	2,086.8	1,791.3	86.0				8.0	80.0		23.5
Ching, Denayse	1,557.0	1,505.0	35.0						56.0	
Fernandez, Judith	2,098.0	1,841.8	23.5				1.5	7.7	80.0	41.5
Fernandez, Sonia	1,555.5	1,290.5	177.0					56.0	32.0	
Garo, Michel	2,091.0	1,875.3	3.0	58.7				12.0	40.0	80.0
Gonzalez, Alberto G.	1,840.0	1,742.5	18.0	3.5					56.0	20.0
Gonzalez, Hades	123.0	74.0	34.0							15.0
Infranzon, Anoland	14.0		134.5	9.5						
Lara, Delgiz	2,069.0	1,900.5	29.0					40.0	80.0	19.5
Lopez, Jennifer	2,040.0	28.0	1,884.5				15.5	58.0	32.0	22.0
Lopez, Sandra	1,707.0		1,627.0					64.0		16.0
Lopez, P.E., Raissa	354.0	354.0								
Lozada, Luis M.	878.5	817.8	11.7	1.0					48.0	
Martinez, E.I., Alexis	2,078.0	1,774.0	156.5	3.0			8.0	33.0	42.0	51.0
Morales, Maris	485.0	353.0	106.0				2.0	8.0		16.0
Morilla, Jorge	2,002.5	1,923.5	510.5	19.0			5.5	56.0	56.0	26.0
Parra, Hugo	2,051.0	1,889.0	51.0				1.0	56.0	40.0	14.0
Paz, P.E., Gonzalo A.	83.0	83.0								
	27,505.3	20,667.7	3.0	4,987.4	52.0	4.5	56.7	613.5	793.0	273.5

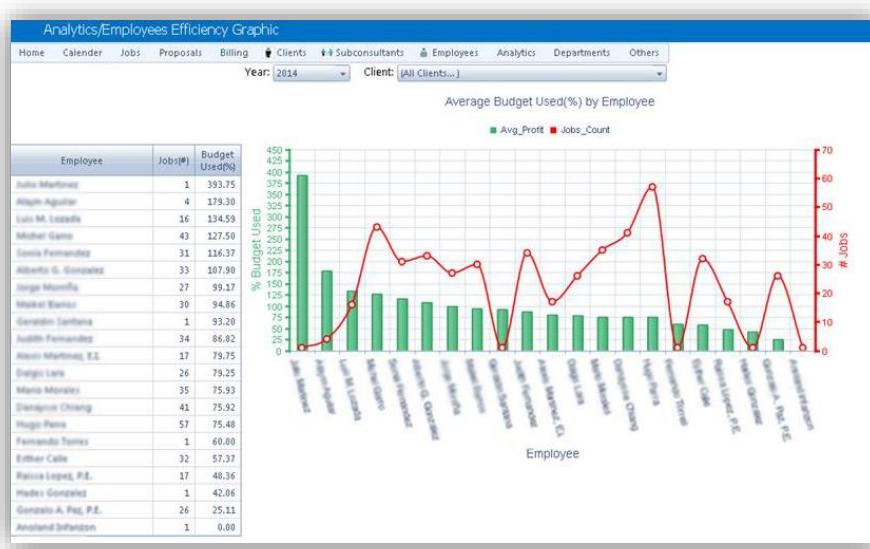
## Employee/Employee Efficiency Graphic

Average Budget Used (%) by Employee, showing all the employees, the number of jobs assigned to them and the budget used.

The Efficiency Graphic shows the employees working efficiency, whether they work efficiently and generate income or loss to the Company. A good degree of efficiency is to have the Avg\_Profit series below 100%.

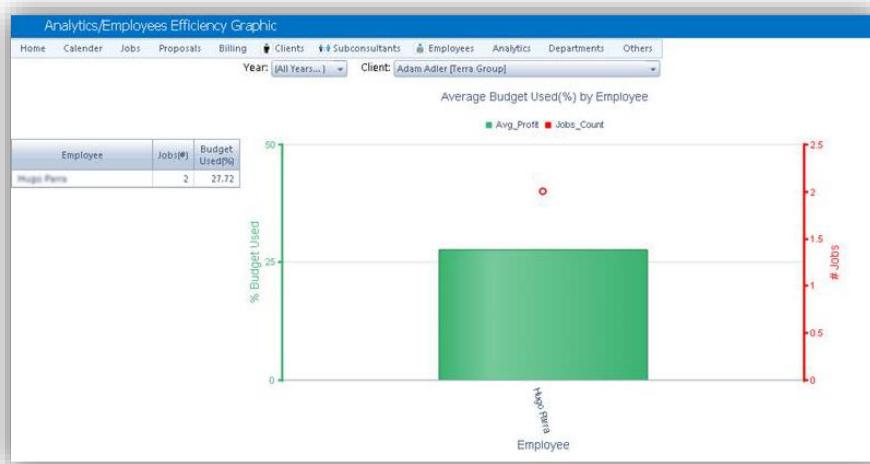
Avg\_Profit: ■ Avg\_Profit

Jobs\_Count: ■ Jobs\_Count



**Filters:** Year and Client

They allow to see the results for a specific client and year.

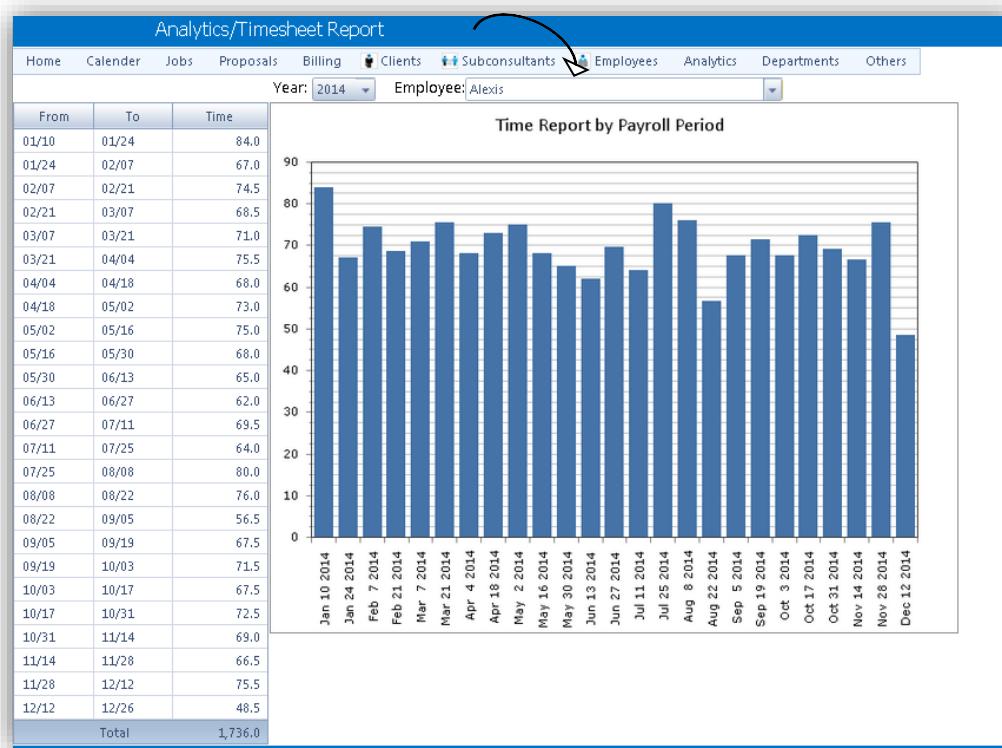


## Employee/Timesheet Report

Timesheet Report: A Graphic with data of employee payment for worked hours.

Filters: (Year and Employee) and a table with the columns (From, To, Time), showing the two-weeks period in which payment was made and the employee's quantity of hours.

Ex. Time Report by Payroll Period Graph.



## Employees/Permissions

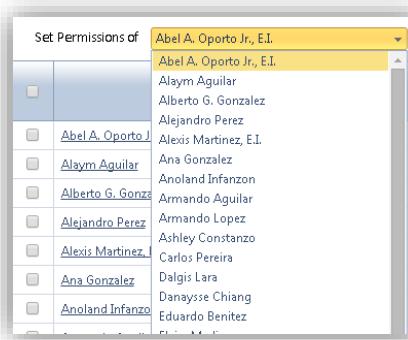
A System Administrator's option to define the access levels for employees using PASconcept.

This page lists all registered employees and the menu options every employee can access to may be individually defined.

A good practice can be setting permissions for an employee, and then apply these same permissions to other employees with the same security level.

For this purpose, "Set Permissions of" is used.

Set Permissions of (Add employee)



To Selected employees, Click (Apply) after selecting employees with the same permissions.

Employees/Employees Permissions												
		Employee Site										
		Client Site (I)										
Home	Calender	Jobs	Proposals	Billing	Clients	Subconsultants	Employees	Analytics	Departments	Others		
Set Permissions of		to selected employees <input type="button" value="Apply"/>										
		Employee Name	Allow Employees Permissions	Deny Jobs List	Deny Proposals List	Deny Invoices List	Deny Clients List	Deny Requests ProposalsList	Deny Subconsultants	Deny Employees List	Deny List	Deny Analytics
<input type="checkbox"/>	<input type="checkbox"/>	Abel A. Oporto Jr., E.I.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Alaym Aguilar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Alberto G. Gonzalez	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Alejandro Perez	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Alexis Martinez, E.I.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ana Gonzalez	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Anoland Infanzon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Armando Aguilar	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Armando Lopez	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The table shows the information on the permissions assigned to each employee (Employee Name, Permissions Allow Employees, Jobs Deny List, Deny List Proposals, Invoices Deny List, Clients List Deny, Deny Requests Proposals List, List Subconsultant Deny, Deny Employees List appears, , Deny Analytics)

Allow Employees Permissions: This option allows employees to access all (has all permissions)

Example:

Employees/Employees Permissions											
Client Site (1) Employee Site   Sandra Lopez   Log Out											
Home Calender Jobs Proposals Billing Clients Subconsultants Employees Analytics Departments Others											
Set Permissions of <input type="text" value="Abel A. Oporto Jr., E.I."/> to selected employees <input type="button" value="Apply"/>											
	Employee Name	Allow Employees Permissions	Deny Jobs List	Deny Proposals List	Deny Invoices List	Deny Clients List	Deny Requests List	Deny ProposalsList	Deny Subconsultants List	Deny Employees List	Deny Analytics
<input type="checkbox"/>	Abel A. Oporto Jr., E.I.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Alaym Aguilar	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alberto G. Gonzalez	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Alejandro Perez	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Alexis Martinez, E.I.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Ana Gonzalez	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Andrea Infanzon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Armando Aguilar	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Armando Lopez	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Ashley Constanzo	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Carlos Pereira	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Dalgis Lara	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Danayse Chiang	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click on an employee to edit permissions; a permissions table will appear marking those that cannot be accessed by the employee.

For example, in this case, the employee has marked Permissions Allow Employees (access to all)

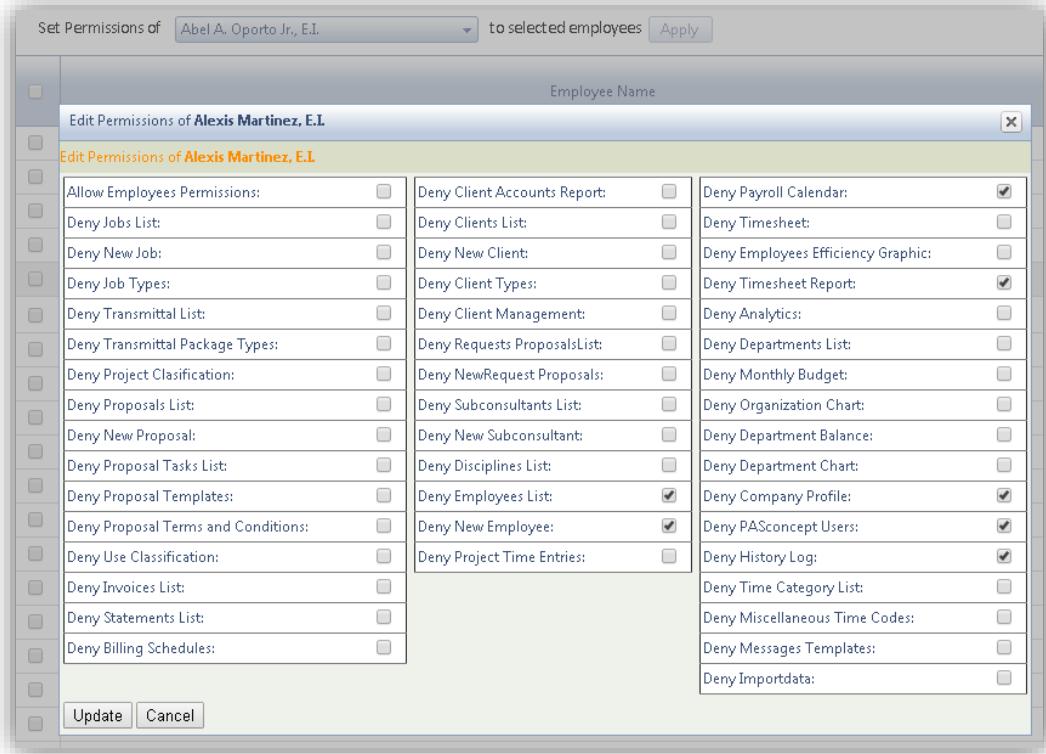
Employee Name: Sandra Lopez

Edit Permissions of Sandra Lopez

Allow Employees Permissions: <input checked="" type="checkbox"/>	Deny Client Accounts Report: <input type="checkbox"/>	Deny Payroll Calendar: <input type="checkbox"/>
Deny Jobs List: <input type="checkbox"/>	Deny Clients List: <input type="checkbox"/>	Deny Timesheet: <input type="checkbox"/>
Deny New Job: <input type="checkbox"/>	Deny New Client: <input type="checkbox"/>	Deny Employees Efficiency Graphic: <input type="checkbox"/>
Deny Job Types: <input type="checkbox"/>	Deny Client Types: <input type="checkbox"/>	Deny Timesheet Report: <input type="checkbox"/>
Deny Transmittal List: <input type="checkbox"/>	Deny Client Management: <input type="checkbox"/>	Deny Analytics: <input type="checkbox"/>
Deny Transmittal Package Types: <input type="checkbox"/>	Deny Requests ProposalsList: <input type="checkbox"/>	Deny Departments List: <input type="checkbox"/>
Deny Project Clasification: <input type="checkbox"/>	Deny NewRequest Proposals: <input type="checkbox"/>	Deny Monthly Budget: <input type="checkbox"/>
Deny Proposals List: <input type="checkbox"/>	Deny Subconsultants List: <input type="checkbox"/>	Deny Organization Chart: <input type="checkbox"/>
Deny New Proposal: <input type="checkbox"/>	Deny New Subconsultant: <input type="checkbox"/>	Deny Department Balance: <input type="checkbox"/>
Deny Proposal Tasks List: <input type="checkbox"/>	Deny Disciplines List: <input type="checkbox"/>	Deny Department Chart: <input type="checkbox"/>
Deny Proposal Templates: <input type="checkbox"/>	Deny Employees List: <input type="checkbox"/>	Deny Company Profile: <input type="checkbox"/>
Deny Proposal Terms and Conditions: <input type="checkbox"/>	Deny New Employee: <input type="checkbox"/>	Deny PAsConcept Users: <input type="checkbox"/>
Deny Use Classification: <input type="checkbox"/>	Deny Project Time Entries: <input type="checkbox"/>	Deny History Log: <input type="checkbox"/>
Deny Invoices List: <input type="checkbox"/>		Deny Time Category List: <input type="checkbox"/>
Deny Statements List: <input type="checkbox"/>		Deny Miscellaneous Time Codes: <input type="checkbox"/>
Deny Billing Schedules: <input type="checkbox"/>		Deny Messages Templates: <input type="checkbox"/>
		Deny Importdata: <input type="checkbox"/>

Geraldin Santana

And in this case, the employee does not have access to the marked permissions. (Employee List Deny, Deny New employee, Company Profile Deny, Deny Timesheet Report, Payroll Calendar Deny, Deny History Log, Pasconcept Deny Users); therefore, the Employee cannot access any of these pages.



After making any changes to the permissions, Click Update.

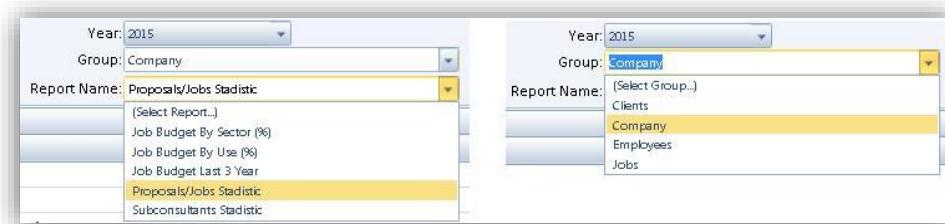
## Analytics

### Analytics/Report

**Filters:** (Year, Group, and Report Name)

**Group:** Select filter (Clients, Company, Employee, and Jobs). Each group has its own reports.

**Report Name:** Select report type (Client Balance, Stadistic Client, Client by Status (%) Clients by Types (%), New Clients by Year, and Pending to Paid).



The table shows the data columns (Client name & Company, Number of Jobs, Total Budget, Bill, Collected and Balance), based on the type of Group and Report Name previously selected.

**Example 1:**

Year: 2015 Group: Clients Report Name: Client Balance

Analytics/Reports					
<a href="#">Home</a> <a href="#">Calendar</a> <a href="#">Jobs</a> <a href="#">Proposals</a> <a href="#">Billing</a> <a href="#">Clients</a> <a href="#">Subconsultants</a> <a href="#">Employees</a> <a href="#">Analytics</a> <a href="#">Departments</a> <a href="#">Others</a>					
<b>Dynamic Reports:</b> Select the Group and Report Name, and press the Refresh button to get the statistic or utility results					
Year: 2015	Group: Clients	Report Name: Client.Balance	<input type="button" value="Refresh"/>	<input type="button" value="Print Page"/>	
Client Name & Company	Number of Jobs	Total Budget	Bill	Collected	Balance
Adolfo Perez [Muthrich Corporation]	1	350.00	350.00	350.00	0.00
Alice Santana [AA Architecture]	1	1,750.00	1,750.00	0.00	1,750.00
Alethea Quinn [Phone Sheet Services, Inc.]	2	1,400.00	1,400.00	850.00	750.00
Anabel Alfonso [Gordon Tandy Contractors, Inc.]	2	3,500.00	3,500.00	0.00	3,500.00
Anne Jackway [Anne Jackway Architecture, Inc.]	1	650.00	650.00	650.00	0.00
Antonia Klein [Trust Investment Inc.]	1	1,745.00	1,745.00	1,745.00	0.00
Benjamin Roche [Benjamin Roche]	1	600.00	600.00	600.00	0.00
Brian M. Lacy, III [LBInnovation]	1	10,096.99	6,850.00	2,050.00	7,956.99

**Example 2 (with another Group, and Report Name)**

Group: Company Name Report: Proposals / Jobs

Analytics/Reports					
<a href="#">Home</a> <a href="#">Calendar</a> <a href="#">Jobs</a> <a href="#">Proposals</a> <a href="#">Billing</a> <a href="#">Clients</a> <a href="#">Subconsultants</a> <a href="#">Employees</a> <a href="#">Analytics</a> <a href="#">Departments</a> <a href="#">Others</a>					
<b>Dynamic Reports:</b> Select the Group and Report Name, and press the Refresh button to get the statistic or utility results					
Year: 2015	Group: Company	Report Name: Proposals/Jobs Statistic	<input type="button" value="Refresh"/>	<input type="button" value="Print Page"/>	
CONCEPT	year-4	year-3	year-2	year-1	
# Proposal	501.00	551.00	651.00	772.00	
# Jobs	400.00	339.00	392.00	468.00	
Hit Rate #Jobs/Proposal	0.71	0.60	0.00	0.63	
\$ Proposal	1,546,300.00	1,694,472.50	2,098,989.00	3,744,137.30	
\$ Jobs	780,800.00	684,281.15	1,100,333.50	1,280,394.95	
Hit Rate \$Jobs/Proposal	0.51	0.40	0.54	0.34	

## Analytics/Dashboard

This page shows analytical graphs of Proposal vs Jobs, Bill vs Collected, % Budget by Sector, % Jobs By Use, % Clients by Type and % Clients by Status.

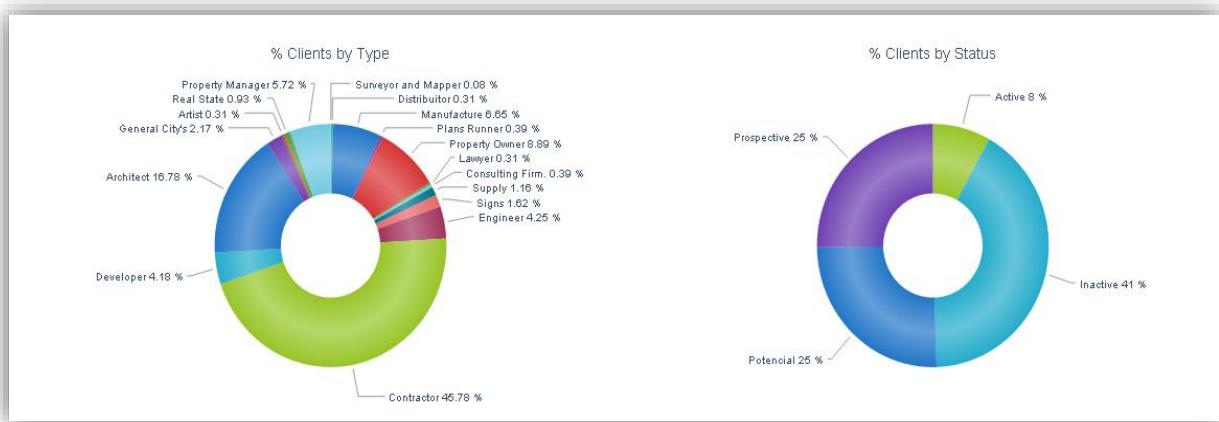
(Proposal vs Jobs) (Bill vs Collected) as shown in the screenshots below.



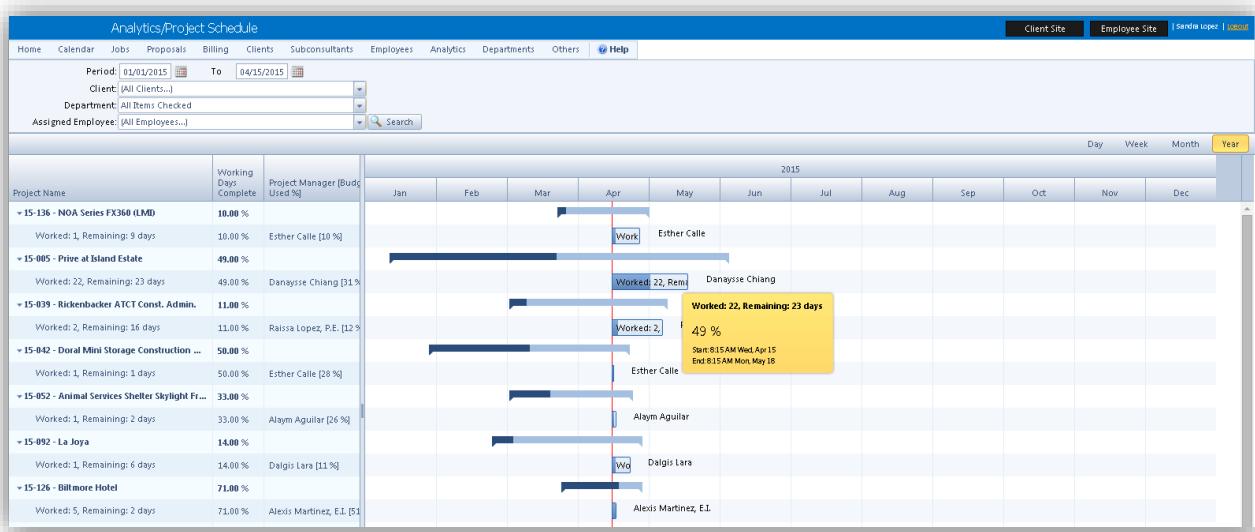
(% Budget By Sectors) (% Jobs By Use)



(% Clients by Type) (% Clients by Status)



## Analytics/Project Schedule

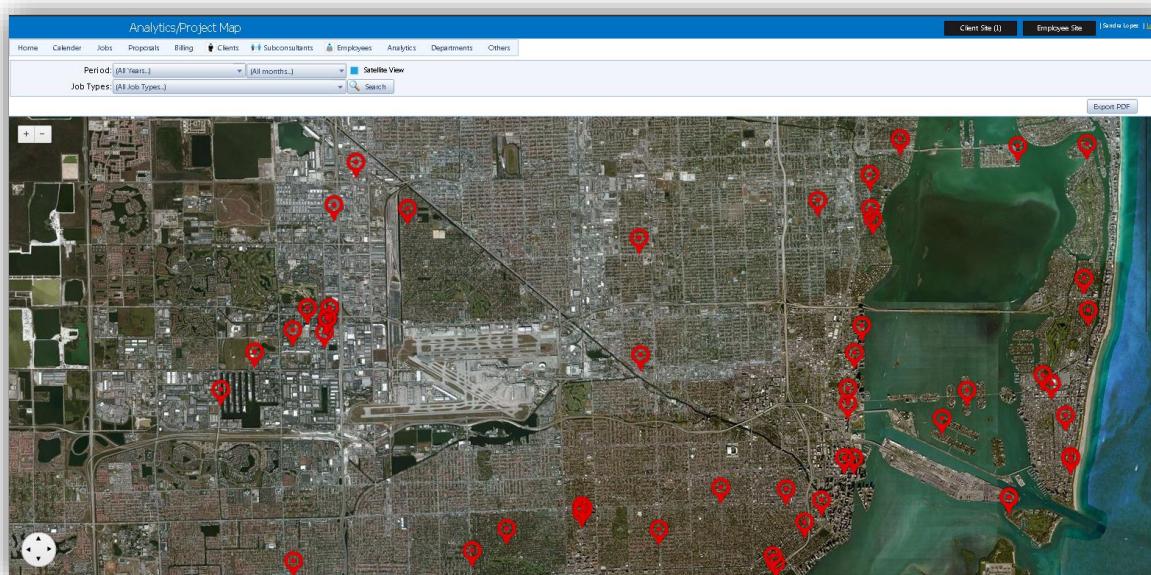
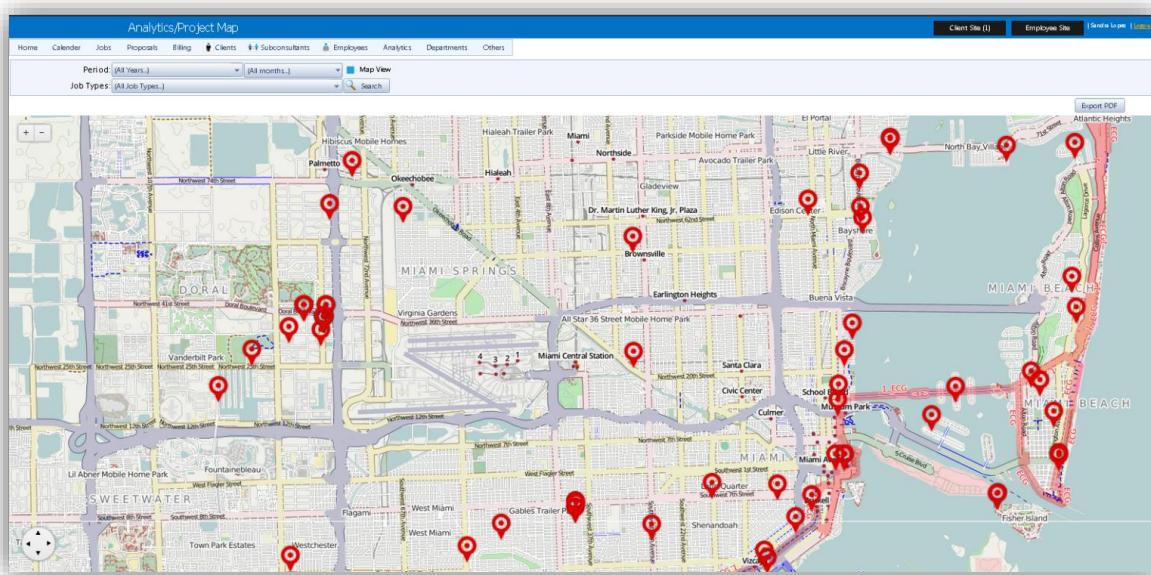


## Analytics/Project Map

A geographical representation of the Projects (Jobs) on a map, with specific location and data for each project. The projects represented may be selected by time period and type. You can select Satellite View or Map View.

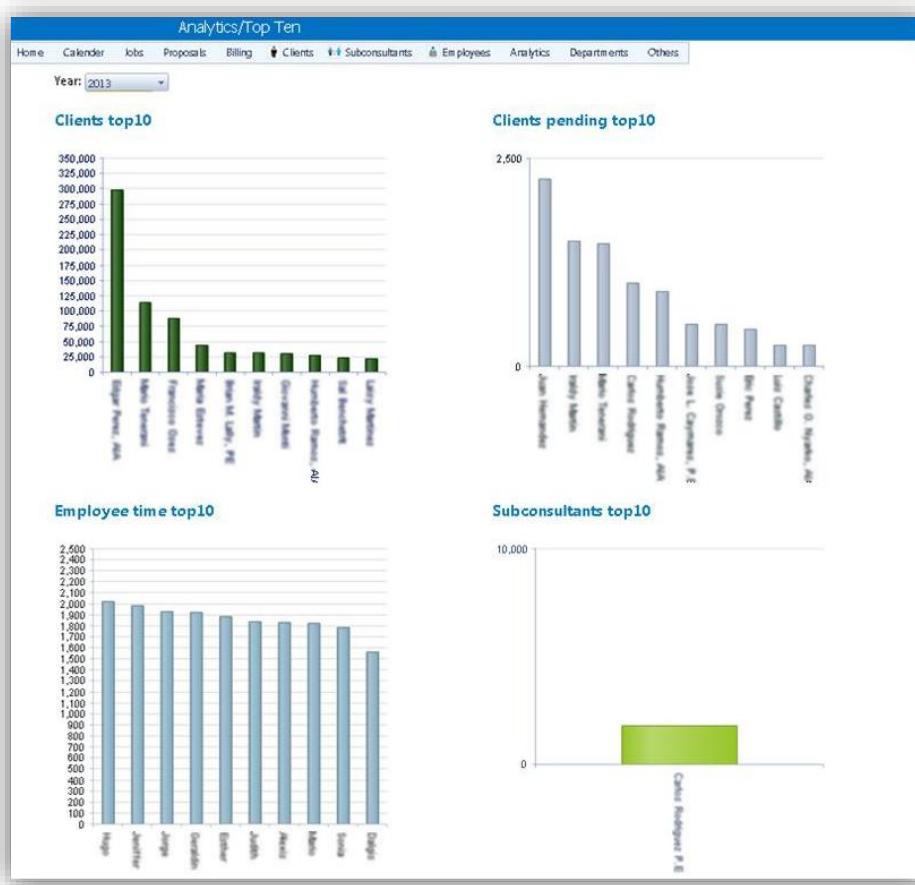
For projects to be represented in this view, it is necessary to provide Latitude and Longitude on the Jobs/Project Classification page.

Click the button Map view, and it will change from Satellite to map view.



## Analytics/Top Ten

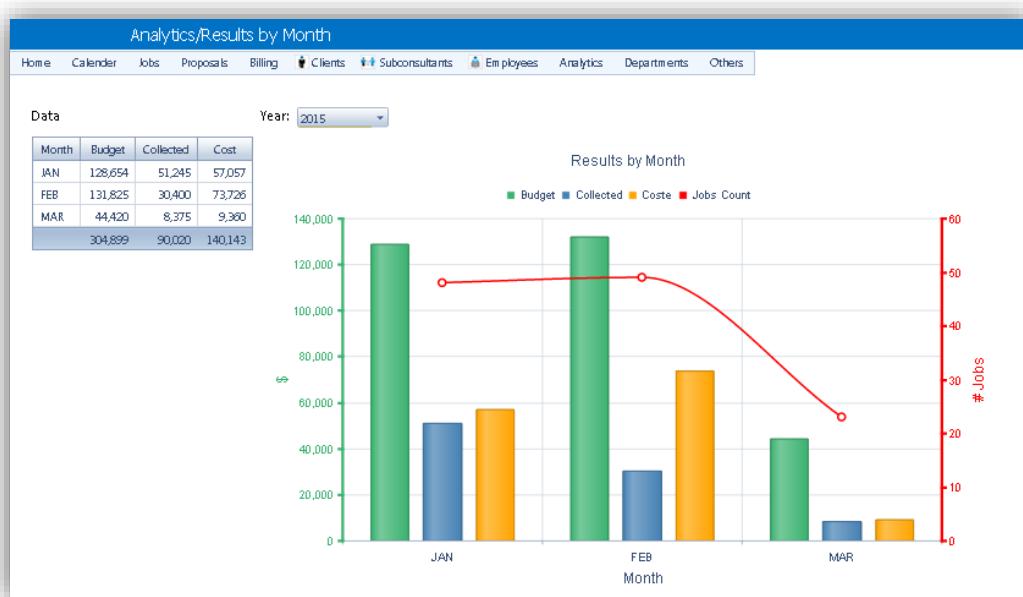
The Analytics Top Ten page shows four graphs (Clients top10, top10 Clients pending, Employee time and Subconsultant top10 top10).



## Analytics/Results by Month

The graph shows the results for each month, with a filter by year.

See Table (Data), showing the total values per month (Budget, Collected, and Cost).



## Analytics/Results by Year

The reporting table displays all the data represented in the graph (Year, #Jobs, Budget, Collected, and Cost) by year.



## Analytics/Jobs Report

The Jobs Report presents a list of reports for this year and every month to date, with the Job number information.

Year	Month	Job	Date	Client	Budgets	Collected	Balance	Coste
<b>2015</b>								
<b>January</b>								
15-001	2026 Fisher Island C. Admin	1/5/2015	Zenia Montiel, LEED® AP	765	0	765	1,350	
15-002	Treasures On the Bay II	1/5/2015	Christa Bovell	255	255	0	0	
15-003	300 Redwood C. Admin	1/8/2015	Marianne Grimaire	1,000	1000	0	660	
15-004	Marquis Unit 6302 Redesign 1	1/8/2015	Carlos Correa	750	0	750	1,070	
15-005	Prive at Island Estate	1/8/2015	François Ouer	33,000	0	33,000	4,725	
15-006	The Crimson Tower Phase II	1/7/2015	Calisto Perez	1,500	750	750	8,450	
15-007	Oceanview Park	1/7/2015	Charles Gomez	18,063	6,125	11,938	0	
15-008	Wilkins Badger Residence	1/7/2015	José Castro	2,025	2025	0	3,185	
15-009	Doral Palms North Guardhouse	1/7/2015	Edgar Perez, AIA	2,500	2250	250	1,545	
15-010	Stritter Estate Railings	1/7/2015	José Garcia	1,550	1550	0	2,178	
15-011	Jecod Holding	1/8/2015	José Zerón	750	750	0	300	
15-012	San Lazaro Fence	1/8/2015	Lazaro Regalado	800	800	0	0	
15-013	Waite Residence	1/8/2015	Roberto Henrie	1,500	1500	0	750	
15-014	Water Station Mullins Park	1/9/2015	Adolfo Perez	350	350	0	500	
15-015	4520 W. Hallandale Addition	1/9/2015	Roberto Henrie, AIA	750	0	750	175	

## Analytics/Client Account Report

An informative table with an account report for every client, with a filter by year.

Client Name	Organization	Total Budget	Total Amount Collected	Total Amount Pending
Adolfo Perez	AllTech Corporation	350	350	0
Alvin Samaniego	AA Architecture	1,750	0	1,750
Alfredo Quiles	Home Steel Services, Inc.	1,400	650	750
Angel Alvarado	Golden Sands Contractors, Inc.	3,500	0	3,500
Annie McNamee	Annie McNamee Architecture, Inc.	650	650	0
Autorio Karmi	Vault Investment Inc	1,745	1,745	0
Benjamin Roche	Benjamin Roche	600	600	0
Brian M. Sally, PE	CTI Navigation	10,007	0	10,007
Carlos Perez	The Window Guys of Florida	1,500	750	750
Carlos Correa	CP Construction & Investment	750	0	750
Carlos Torrecilla	Centris Group Inc	1,900	1,900	0
Charles O. Rypka, AIA	Rypka Architectural Group	7,500	1,750	5,750
Christie Bovell	Treasures On the Bay II	255	255	0
Claire Hromberg	PFA Group USA	650	650	0
Clinton Gomes	Greatview Park Condominium Assoc. Inc.	18,063	6,125	11,938
Domenic Gallo	Domenic J. Gallo & Associates	2,500	1,250	1,250
Deniel DiCaterina	INTER MARBLE AND GRANITE.COM	1,500	700	800

## Departments

### Departments/Departments List

Includes the departments that exist in the Company.

Click Add New/Edit/Delete deparments by Name, Description, and whether or not it is "Productive"

Department List		
<a href="#">Home</a> <a href="#">Calendar</a> <a href="#">Jobs</a> <a href="#">Proposals</a> <a href="#">Billing</a> <a href="#">Clients</a> <a href="#">Subconsultants</a> <a href="#">Employees</a> <a href="#">Analytics</a> <a href="#">Departments</a> <a href="#">Others</a>		
<a href="#">Add New Department</a>	<a href="#">Print Page</a>	
<a href="#">Edit</a>	Name	Description
<input checked="" type="checkbox"/>	Administrative (V.P)	Administrative Vice President
<input checked="" type="checkbox"/>	Administrative and Marketing	
<input checked="" type="checkbox"/>	Civil Eng	Civil Engineering (Project Manager)
<input checked="" type="checkbox"/>	Clerical	Clerical
<input checked="" type="checkbox"/>	Construction Administration	Project Manager
<input checked="" type="checkbox"/>	Construction Adminstration (Inspector)	Construction Adminstration (Inspector)
<input checked="" type="checkbox"/>	President	
<input checked="" type="checkbox"/>	Spec. Eng. Misc. Metals	Specialty Engineering Protective Systems & Miscellaneous Metals (Project Manager)
<input checked="" type="checkbox"/>	Spec. Eng. Misc. Metals (Proj Eng)	Specialty Engineering Protective Systems & Miscellaneous Metals (Project Engineer)
<input checked="" type="checkbox"/>	Spec. Eng. W & D	Specialty Engineering Windows and Doors (Project Manager)

Edit: Click here to edit.

Name:	Administrative (V.P.)
Description:	Administrative Vice President
Parent Department:	President
Productive:	<input checked="" type="checkbox"/>
<a href="#">Update</a> <a href="#">Cancel</a>	

**Name:** Name of departments, Ex.: (Civil Eng., Clerical, Construction Admin, President, etc.)

**Description:** Description of department: Name: Civil Engineering, Description: Civil Engineering (Project Manager).

**Productive:** Check if the Department is productive. This mark applies to multiple pages with filters Departments (productive).

**Delete:** Deletes the entire Department from the list.

## Departments/Budget Departments

Budget forecast budgets by department and month.

Definition of Monthly Budget for each Department "Productive"

"Initialize Budgets" calculates the Budget for the current year, based on what was executed the previous year with an increase of value "Increase"

Filter by year (Year).

**Increase:** Percentage we increase the monthly budget of the department compared to the previous year

**Initialize Budgets:** An action to initialize monthly budgets for departments, referred to the preceding year and considering "Increase".

The screenshot shows a web-based application titled "Budget Departments". At the top, there's a navigation bar with links for Home, Calender, Jobs, Proposals, Billing, Clients, Subconsultants, Employees, Analytics, Departments, and Others. The "Analytics" tab is currently selected. A dropdown menu for "Year" shows "2015". Below the navigation, there are buttons for "Increase" (set to 0%), "Initialize Budgets", and "Print Page". A note below the buttons says "Initialize budgets based on values from the previous year increased by the percentage specified". The main area is a table with columns for Edit, Department, and months from Jan to Dec, plus a Total column. The table lists several departments with their respective monthly budgets. At the bottom of the table, there are footer links for "PMSconcept", "Version: PROSPER, Revision: 4.3.1 (Mar 24, 2015) Framework 4.5.1", and a "VERIFIED & SECURED" seal.

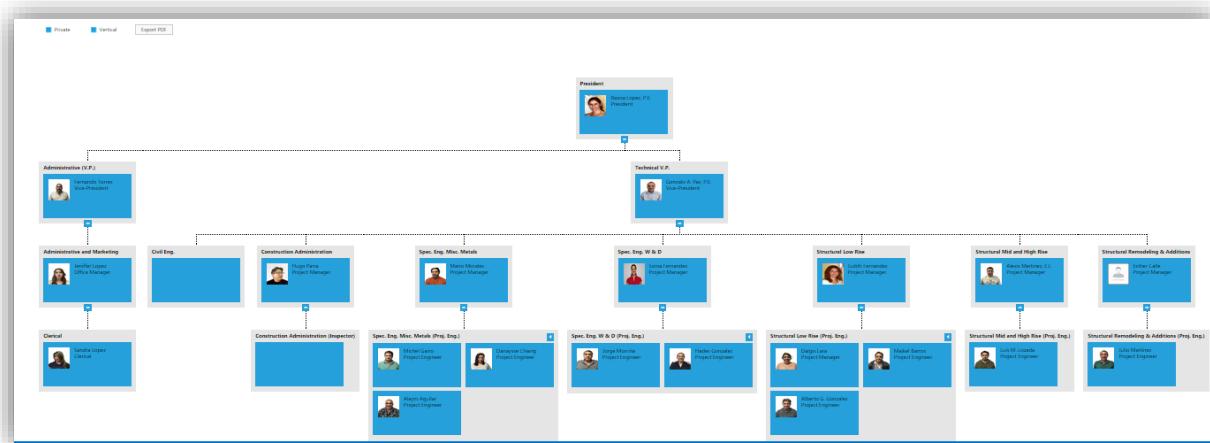
Edit	Department	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
	Administrative and Marketing	0	0	0	0	0	0	0	0	0	0	0	0	0
	Civil Eng.	0	0	0	1,563	0	0	0	1,000	0	0	0	0	2,563
	Spec. Eng. Misc. Metals	33,963	60,094	33,563	28,125	35,938	38,188	25,563	58,219	32,913	49,156	54,875	23,094	473,688
	Spec. Eng. W & D	22,975	15,838	0	16,494	3,000	9,051	16,897	938	7,063	59,375	3,125	3,250	158,004
	Structural Low Rise	55,625	54,647	26,500	48,767	45,563	29,375	32,563	46,544	50,781	16,875	59,425	13,969	480,633
	Structural Mid and High Rise	0	0	0	0	0	0	0	0	25,000	0	0	81,875	106,875
	Structural Remodeling & Additions	38,938	22,125	8,319	9,113	29,375	21,250	62,000	10,250	37,113	12,063	33,125	4,375	288,044
		151,500	152,703	68,381	104,061	113,875	97,864	137,022	116,950	152,869	137,469	150,550	126,563	1,509,806

## Department/Organization Chart

Department Structure: A diagram with the Company structure divided by departments.

Departments Flowchart of the company. The "Private/Public" button hides or shows production information for each department.

The "Vertical / Horizontal" button organizes the chart in one direction or another.



**Private/Public:** To show/hide information in the diagram Demand/Implementation by Productive departments.

## Departments/Balance

Monthly Balance of "Productive" Departments. For each month of the selected year, the Budget is listed, what was executed and the Balance.

Filter by year (Year)

**Print Page:** click to Print.



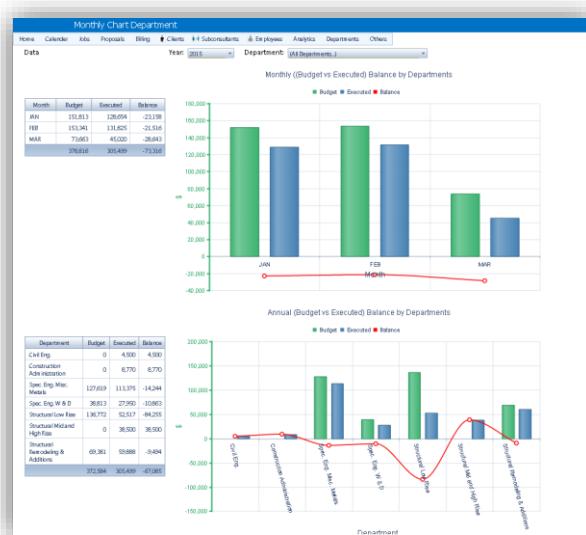
**Export To Excel**

The table shows the Departments and information columns (Bud: Budged, Exec: Executed, Bal: Balance) by department and month.

Balance Departments															
Department	January			February			March			April			May		
	Bud	Exec	Bal	Bud	Exec	Bal	Bud	Exec	Bal	Bud	Exec	Bal	Bud	Exec	Bal
Administrative and Marketing	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Civil Eng.	0	0	0	0	0	0	0	4,500	4,500	1,563	0	-1,563	0	0	0
Spec. Eng. Misc. Metals	33,963	62,325	28,363	60,094	32,900	-27,194	33,563	24,100	-9,463	28,125	0	-28,125	35,938	0	-35,938
Spec. Eng. W & D	22,975	2,150	-20,825	15,838	25,000	9,163	0	33,300	33,300	16,494	0	-16,494	3,000	0	-3,000
Structural Low Rise	55,625	25,397	-30,228	54,647	13,195	-41,452	26,500	30,750	4,250	48,767	0	-48,767	45,563	0	-45,563
Structural Mid and High Rise	0	0	0	0	30,000	30,000	0	0	0	0	0	0	0	0	0
Structural Remodeling & Additions	38,938	36,713	-2,225	22,125	20,450	-1,675	8,319	9,475	1,156	9,113	0	-9,113	29,375	0	-29,375
	151,500	126,584	-24,916	152,703	121,545	-31,158	68,381	102,125	33,744	104,061	0	-104,061	113,875	0	-113,875

## Department/Monthly Chart department

Comparative Graphics of Budget/Executed and Balance, monthly and annual by Department.



## Others

### Others/Company Profile

Overview and configuration data of the company.

**Public Company Experience site:** Link to a page with public information on Types of Projects executed by the company.

This page allows you to Edit Name, Address, Phone, Email, Letter head, Sign and Notices of the company.

Others/Company Profile

Home Calendar Jobs Proposals Billing Clients Subconsultants Employees Analytics Departments Others

[Public Company Experience site](#)

[Edit Company Profile](#)

**Company Information**

Company ID:	260965
Company Name:	PAS Function Demo & Test
Company Type:	Architectural & Interior Design
Representative:	Nabila Torres
Address Line 1:	666 Parcelas Drive
Address Line 2:	
City:	Coral Gables
State:	Florida
Zip Code:	33999
Telephone:	305-807-5108
Cell Phone:	305-807-5108
Fax:	
Language	en

**Email Notification Setup**

Administrator Email:	pasfunctionone@easterneg.com
SMTP Server:	smtp.easterneg.com
Website:	http://www.pasconcept.com
Email Signature:	[REDACTED]
Notification Cc... Email:	pasfunctionone@easterneg.com
Notification Bcc... Email:	

**Notifications messages**

Job Profit:	<input checked="" type="checkbox"/>
Proposal Accepted/Declined:	<input checked="" type="checkbox"/>
RFP Accepted/Declined:	<input checked="" type="checkbox"/>
Invoice Emitted:	<input checked="" type="checkbox"/>
Invoice Collected:	<input checked="" type="checkbox"/>

[Edit Company Profile](#)

**Letterhead and Signature Pictures for Company Identity**

Picture quality recommended for company letterhead: 1700x225 pixels, 200 dpi resolution equivalent to 8,5" x 1,5"

[Edit](#) [Proposal/Invoice Letterhead](#)

**PAS Function One**  
11000 SW 22<sup>nd</sup> Terrace, Miami, FL 33720  
T: (305) 555-5555 F: (305) 555-5556 www.pasfunction1.com

[Edit](#) [Proposal Signature](#)

**Diffuser for Facebook Pages followers**

Connected to/  
416688448497501 CAAWWTZBQEbu7EBATTHhnMQUfrRRQJUy4aUoUR6pV/

[Disconnect Facebook](#)

## **Others/Account Options**

In the accountoption, you can customize your profile.

**Upload Photo:** Add an image of the user.

**Change Password:** Change password.

**Page Settings:** My Favorite Page: Choose your favorite page when you start PASconcept.

Pre-defined filters for Job list page: The employee may customize his/her Job List Page by selecting the filters (Filter Year, Month, employee Filter, and Department Filter).

**Employee Filter:** Defines the employee.

**Department Filter:** Defines the department (Civil Engineer, Structural Low rise, Construction Admin, etc.)

**Pre-defined filters for Proposal list page:** Customizes the Proposal List Page (Year Filter, Filter Month, and Department Filter).

**Update:** Click to save your changes.

The screenshot shows the 'Others/Account Options' page with the following sections:

- Upload Photo:** A section for uploading a personal avatar. It includes a placeholder image, a 'Select' button, an 'Upload Image' button, and a note about file size limit (500kb, recommended resolution 60x70).
- Change Password:** A section for changing the password. It includes fields for Old Password, New Password, and Confirm Password, along with a note about password requirements (minimum 6 characters, one non-alphanumeric character) and an 'Update Password' button.
- Page Settings:** A section for defining the favorite home page. It includes a dropdown for 'My Favorite Page' set to 'Home Page', and two sets of pre-defined filters for 'Job List page' and 'Proposal List page'. Each set includes dropdowns for Year Filter, Month Filter, Employee Filter, and Department Filter, all currently set to '(All Years...)'. There is also an 'Update' button at the bottom.

## **Others/Email Records List**

Summary table with the list of messages and notifications among internal PASconcept users.

**Add new Message:** click to add a new message.

**Open:** Click to open and edit the message.

**Reply:** Click to Resend

**Subject:** Message Subject.

**Date:** date it was sent.

**Delete:** Click to permanently delete the message.

	<input type="checkbox"/> Open	<input type="checkbox"/> Reply	From	Subject	Date	Delete
<input type="checkbox"/>			Fernando	[15-085]. Special Inspection	03/05/15	
<input type="checkbox"/>			Fernando Torres	[15-085]. Special Inspection	03/05/15	
<input type="checkbox"/>			Fernando	Special Inspection	03/05/15	
<input type="checkbox"/>			Fernando Torres	Special Inspection	03/05/15	
<input type="checkbox"/>			Fernando	Meeting with Luis Catasus 2:30 PM	03/04/15	
<input type="checkbox"/>			Fernando Torres	Meeting with Luis Catasus 2:30 PM	03/04/15	
<input type="checkbox"/>			Fernando	Meeting with Luis Catasus 2:30 PM	03/04/15	

## **Others/History Log**

An Informative table with the Employees profiles when they access PASconcept.

This table defines which action is used to enter.

Email	Actions	Date	Notes
sandra@easterneg.com	Admin Login	3/17/2015 12:25:00 PM	Sandra Lopez
fernando@easterneg.com	Employee Login	3/17/2015 11:51:00 AM	Fernando Torres
jennifer@easterneg.com	Admin Login	3/17/2015 11:35:00 AM	Jennifer Lopez
mario@easterneg.com	New Client	3/17/2015 11:34:00 AM	Analbel C. Garcia
fernando@easterneg.com	Admin Login	3/17/2015 11:29:00 AM	Fernando Torres
mario@easterneg.com	Admin Login	3/17/2015 11:20:00 AM	Mario Morales

## **Others/Time Category List**

List of categories for the times introduced to the Jobs by the Employees.

**Add New Time Category:** Click to add a new time category.

Edit	Code Name	Delete
	Field Condition	
	Additional Service	
	Shop Drawing Review	
	Site Visit	
	...	

## **Others/Miscellaneous Time Codes**

List of unproductive time codes classified by (Overtime Hours, Holiday, Sick Time, etc.)  
Add New Time Code, Click to add description of time.

The screenshot shows a table with columns for Edit, ID, and Code Name. The rows contain the following data:

Edit	ID	Code Name	Delete
	1	Overtime Hours	
	2	Holiday	
	3	Administration	
	4	Marketing	

## **Others/Messages Templates List**

A list of messages templates that PASconcept may automatically send .  
Administrators can edit and customize these templates according to each company.

The screenshot shows a table with columns for Edit, Type, and Subject. The rows contain the following data:

Edit	Type	Subject
	Proposal	PASconcept_Proposal for [Project Name]_[Project Type]
	Invoice	Invoice [Invoice Number]_[Project Name]
	Ready to Bill	Invoice [Invoice Number]_[Project Name] is Ready To Be Billed
	Complete RFP	RFP (prfd) is Complete

## **Others/Import Data**

Data import options from files in other format, separated by commas. These options are used when we initialize the company and import Clients or Employees data.

The dialog box has the following sections and controls:

- Import data from "CSV" files**
- Requirements For Import**
  - 1. Name Unique and Not Empty
  - 2. Email Unique or Empty
- To know template file, click link about**  
[For tutorial click then following link](#)
- Select Target:**
- Character Separator:**
- Template File:**
- Source File (csv):**
- Delete all records before import
-

## Employee Site

Employees Users Site, to enter the hours associated to their Jobs.

Pages (Home, Time, Jobs, Invoices, Others)

### Home

#### Employee Control Panel

The Home Page displays a table with all active jobs, and the Job Timesheet showing graphic information for the defined fortnight work (days and hours)

Show All Active Jobs: Click to display only the employee's jobs.



Active Jobs List: An information and editable table showing (Number, Name, Status, Hours Used, and Hours Pending)

As shown in the following figure:



The screenshot shows the Employee Control Panel interface. At the top, there are tabs for Home, Time, Jobs, Invoices, and Others. On the right, there are links for Admin Site, Client Site, Service Area, and Log Out. Below the tabs is a button labeled "Show All Active Jobs" with a checked checkbox. The main area is divided into two sections: "Active Jobs List" and "Job Timesheet".

**Active Jobs List:**

Number	Name	Status	Hours Used	Hours Pending
15-126	Dual Monitor Setup	Not in Progress	0	0
15-127	Open Box	Not in Progress	0	0
15-126	Bitron Work	Not in Progress	0	0
15-125	Fire Station #5	Not in Progress	0	0
15-124	XERO Books #4	Not in Progress	0	0
15-123	Bank of America Biscayne	Not in Progress	0	0
15-122	Chauvin Bros Hotel 1111 Structure Repair	Not in Progress	0	0
15-121	SSL License #9	Not in Progress	0	0
15-120	RY SIR LLC	In Progress	7	+77
15-119	Mr & Mrs John Lawrence	Not in Progress	0	0
15-118	SE Emergency Center Tower Addition Change	In Progress	11	+56
15-117	M2 Aranya Shutter Field Condition #4	Not in Progress	0	0
15-116	M2 Aranya Shutter Field Condition #3	Not in Progress	0	0
15-115	Acucool Panel Wind Calculations	Done	8	+77
15-113	Chauvin Bros Hotel 1201 Handout	Not in Progress	0	0
15-112	Silent Genie	Submitted	12	0
15-111	2117 Beach	Done	23	-7

**Job Timesheet:**

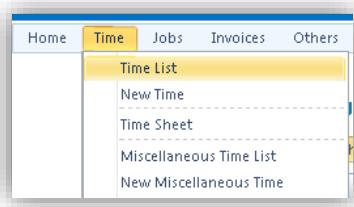
From: 09/07/2015 To: 09/20/2015

Day	Hours
7	7
8	14
9	21
10	28
11	35
12	42
13	49
14	56
15	63
16	70
17	77
18	84
19	91
20	98

Hours Used: Number of hours entered by the employee dedicated to that job.

Pending Hours: Number of hours left to get to 100% Profit.

## Time/Time List



Filters: (Date, Categories, Job, and Clients) and Columns (edit, Job number, Date of Work, Date of Entry, Time (hrs) Description and Delete.

Categories: It defines the work category.

Job: Job number

Client: Client Name

A screenshot of the 'Time/Employee Time List' page. At the top, there is a navigation bar with tabs for Home, Time, Jobs, Invoices, and Others. Below the navigation bar are search filters for Date (All Years..., All Months...), Job (All Jobs...), Category (All Categories...), and Client (All Clients...). There is also a 'Search' button. The main area displays a table with columns for Edit, Job Number, Date of Work, Date of Entry, Time (hrs), Description, and Delete. A message at the bottom left says 'No records to display.'

## Time/New Time

Time-Job Input Page , (Job, Time Worked, Date, Hourly Rate Task, Task No Hourly Rate, Category and Notes)

Show only my jobs: Click here for the page to show only the Jobs assigned to the employee.

Select Job: Select the Job to which you will enter the time.

Final Status: Defines the final status of work (Hold, Done, Under Revision, Approved, Submitted, In Progress or Not in Progress)

Time Worked: Total hours worked in that Job.

Date of Work: Date on which the work was done.

Task Hourly Rate: Select the type of payment for hours

No Hourly Rate Task: Select the type of payment for hours not worked.

Category: Select a work Category (Letter, Meeting, Repeat Fee, Site Visit, Additional Service, etc.)

Notes: For adding notes, as required.

Generate Invoice Hourly Rate: Click Here to generate an automatic invoice per hour, in case this is the type of hourly rate.

First, the employee adds time, and then, if hourly rate is checked, an invoice is automatically added

Time/New Time-Job

Home Time Jobs Invoices Others

Select job, then enter time (in hours) and date that work was performed.  
Click "Add New Time" to complete.

Show only my jobs

Select Job:

Final Status Job: Not in Progress

Time Worked: 1.0  My Total Time (this job): 0.00 hours Time Entered by Others: 0.00 hours

Date of Work: 03/09/2015  Total Time on This Date: 0.00 hours

Hourly Rate Task:

No Hourly Rate Task:

Category:

(\*)Notes:

Generate Invoice Hourly Rate

Project Invoice(s)

Selected Project

All My Projects

All Company Projects

0 1 2 3 4 5 6 7 8 9

## Time/ Timesheet

Hours registered in the fortnight by the employee, with a total at the end of the table.

Project Name: it shows where the hours were charged, in this case it was Administrative.

Example;

February																
Previous	Sun-7	Mon-8	Tues-9	Wed-10	Thurs-11	Fri-12	Sat-13	Sun-14	Mon-15	Tues-16	Wed-17	Thurs-18	Fri-19	Sat-20	Sun-21	
<b>NO JOBS TIME</b>																
<b>Administration</b>				8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	8.0	72.0
<b>Vacation</b>				8.0												8.0
	0.0	0.0	8.0	8.0	8.0	8.0	8.0	8.0	0.0	0.0	8.0	8.0	8.0	8.0	8.0	80.0

## Miscellaneous Time List

Unproductive hours recorded

Category	From	To	Time	Notes	Delete
Administration	3/6/2015	3/6/2015	8	full day	X
Administration	3/6/2015	3/6/2015	8	full day	X
Administration	3/6/2015	3/6/2015	8	full day	X
Administration	3/6/2015	3/6/2015	8	full day	X
Administration	3/6/2015	3/6/2015	8	full day	X
Administration	3/6/2015	3/6/2015	8	full day	X
Administration	3/6/2015	3/6/2015	8	full day	X
Administration	3/6/2015	3/6/2015	8	full day	X

## New Miscellaneous Time

Time/New Time Other

In New Time Other, non-productive activities (Accounting, Administration, Company Improvements, Holiday, Marketing, Overtime Hours, Personal Time, Sick Time, Vacation) are recorded

Time / day: Number of Hours

From and To: Date

Notes: Description

Time/New Time-Other

Home	Time	Jobs	Invoices	Others
 Select category, then enter time in hours and applicable date, or insert time span in days. Click "Add New Time" to complete.				
(*) Select Category: Accounting				
(*) Time/day: 1.0				
From: 03/09/2015				
To: 03/09/2015				
(*) Notes:				
<input type="button" value="Add New Time"/> <input type="button" value="Cancel"/>				

## Jobs/Job List

List of Jobs assigned to the employee, with filters (Date and Months) and a table with (Job Number, Job Name, Job Code, Client Code, Date Opened and Budget Used%)

Jobs/Job List					Admin Site	Client Site	Santa Lopez   My Account   Logout	
Home	Time	Jobs	Invoices	Others				
Date:	2015	(All Months...)			Job Number	Job Name	Job Code	Client Code
15-012	San Lazaro Fence					RF	SANLAZ	01/08/15 0.00

## Jobs/ Job Type List

List of job types with their descriptions.

Jobs/Job Type List						
Home	Time	Jobs	Invoices	Others		
Job Type						Description
00		Not defined				
4P		4 Plex				
5Y		5 Years Drainage Recertification				
AA		Addition				
AC		A/C Roof Top Units				
AD		Administration				
AI		Air Condition Units Support				
AI		Airport				
AN		Addition No Attach				
AP		Addition Piles				
AS		As-built				
AW		Add. 2 Floors Wood				
BA		Banks				
BN		Build. Not Post Tension				
BP		Building Post Tension				
CA		Construction Administration				
CC		Calculations				
CF		Certification Strcutural				
CH		Club House				
CL		Certification Civil				
CO		Canopy				

## Jobs/ Client Codes List

Client code list with client's name.

Jobs/Client Codes List						
Home	Time	Jobs	Invoices	Others		
Client Code						Client Name
13FI		David Deka				
360TONY		Tony Noa				
3SGEOTJ		Juan Antonio Torres				
3T		Eleanne M. Navarro				
40		Willard Shepard				
40		Jacqueline Johnson				
40		Steven J. David				
40		Richard Stenbook MD				
40		Julian Bernilla				

## Invoices/ Invoices Not Collected List

A Table with data on invoices that have not been collected (Invoice Number, Invoice Data, Job Number, Invoice Description, Email Print, Emitted)

## Others

### Others/My Account

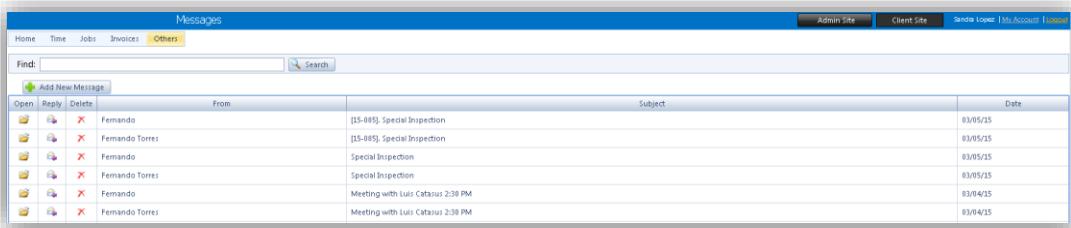
It customizes the employee's account, (Photo, Full Name, Position, Employee Code, Email, Address, Home Telephone, Cell Phone, Starting Date, and Notes)

### Others/Account Option

Change Password

## **Others/Email Records List**

A list with the record of all emails sent.



The screenshot shows a software application window titled "Messages". At the top, there is a navigation bar with links: Home, Time, Jobs, Invoices, Others (which is highlighted in yellow), Admin Site, Client Site, Send to Lope, My Account, and Logout. Below the navigation bar is a search bar with a "Search" button. A "Add New Message" button is located above the main table. The main area contains a table with the following data:

Open	Reply	Delete	From	Subject	Date
			Fernando	[15-085]. Special Inspection	03/05/15
			Fernando Torres	[15-085]. Special Inspection	03/05/15
			Fernando	Special Inspection	03/05/15
			Fernando Torres	Special Inspection	03/05/15
			Fernando	Meeting with Luis Cataruz 2:38 PM	03/04/15
			Fernando Torres	Meeting with Luis Cataruz 2:38 PM	03/04/15