Preface

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Published: September 2009

Applies To: DynaSCAPE Manage 4.5
Introduction to this Software

Your Turnkey Solution to Better Business Management

The smooth, efficient flow of information lies at the heart of every successful business. The better organized you are, the more work you can do in less time, with less effort and for a better bottom line.

DynaSCAPE Manage addresses every aspect of your green industry business and does so without the need to learn and use several pieces of software, or manipulate cumbersome numbers of spreadsheets and paper files. DynaSCAPE integrates with our design component so Design-Build companies can capitalize on the best advantages of automation technology by planning landscapes faster and turning those plans directly into efficient estimates and material take-offs at the touch of a button.

As a landscape construction or maintenance business, DynaSCAPE Manage provides you with a purpose-built software product that helps move vital information smoothly and efficiently using simple data screens and input wizards. DynaSCAPE Manage makes it easy to capture and categorize customer, supplier and employee data, organizing this logically, to make retrieval easy and chance of data loss minimal. Administration of maintenance or construction crews is greatly simplified to provide a better way to gather and process timesheets.

Lastly, DynaSCAPE Manage also accesses unique timesaving online resources and performs powerful cost-profit analysis that takes the guesswork out of where projects make or lose money.

DynaSCAPE Manage is a premier landscape management package. This manual is designed to help you get the most from your software investment. Please take the time to familiarize yourself with the information found here. If you are unable to resolve a problem through the use of these resources, please contact our support line at 1-800-710-1900 x 278 or support@DynaSCAPE.com

Overview of DynaSCAPE Manage: Business Management Software

Introduce your business to the most powerful business management software for the green industry. Built specifically for the landscape professional, DynaSCAPE Manage consolidates your entire business into one software package. Stop entering duplicate information into a variety of different applications and let DynaSCAPE Manage help you:

- Record and categorize customers, contacts, and even correspondence
• Integrate with DynaSCAPE Design for instant quotation from drawings
• Create and track quotes, contracts, supplier invoices, timesheets, and customer invoices
• Improve estimation by instantly contrasting estimated costs with actual costs
• Identify current trends and compare with historical results
• Integrate with Quickbooks accounting software
• Customize reports and templates to give you precise feedback

And much, much more...

DynaSCAPE Manage is the premier landscape management software package.
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Your Turnkey Solution to Better Business Management

Overview of DynaSCAPE Manage: Business Management Software

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Crews

In this chapter you will learn to:

- Understand how crews work in DynaSCAPE Manage
- Add a new crew
- Add employees to a crew
- View/modify crews
- Delete crews

The Crews section of DynaSCAPE Manage allows you to group employees together so their hours can be booked into a timesheet at once, saving time and effort.

Using the Crews section is optional and best suits companies that run crews composed of the same teams consistently. If your business requires you to run crews of different people from one job to the next, maintaining accurate records using the Crews feature won’t be as efficient or beneficial.

If suited to your company, try using the Crews feature to expedite timesheet entry. If your company isn’t suitable at present, proceed to the next chapter and return to the Crews section if your staffing profile changes.
The Crews section is accessed via the View menu on the DynaSCAPE Manage menu bar. To begin, click View | Crews on the menu bar.

If you’re just starting with DynaSCAPE Manage, your crew list will appear empty. This chapter begins with an introduction to the Crew screen and describes how to use it. The remaining sections cover how to add New staff, modify, and delete crews.

## The Crew Screen

The crew screen is used to track general information about staff as well as displaying the list of employees that belong to each crew. Let’s take a look at the crew screen and its associated fields. This screen is accessed by double clicking on any Crew on the main Crew page.

![The Crew Screen](image)

### TABLE 1. Field List - Crew Screen

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>This field records the name of the selected crew [max 50 characters.]</td>
</tr>
<tr>
<td>Division</td>
<td>This field records the division in which the selected crew primarily works. Select the division from a dropdown list. This field is for informational purposes only. The use of this crew will not be restricted based on the results of the division selection.</td>
</tr>
</tbody>
</table>
Creating a New Crew

To create a new crew, start from the Crew screen on the DynaSCAPE Manage main menu (View | Crews).

1. Click the task link to Add a new crew.
2. A blank crew screen appears. Complete the general information about the crew.

3. Click Save to save your changes and proceed to the instructions entitled Adding Employees to a Crew.

Adding Employees to a Crew

1. Click the task link called Add an employee to this crew.
2. A treeview window opens on the right side. This treeview contains a list of active employees, sorted by crew. To find an employee not already assigned to a crew, click the [+] button beside No Crew.

3. Click the name of the employee you wish to add, then drag and drop the employee’s name from the treeview into the Employees section of the crew screen.

4. When the employee’s name appears in the crew screen’s Employees section, the employee has successfully been added to the crew.

5. Repeat the process for as many number of employees as necessary.

6. Click Save when you’ve finished adding employees to save your changes.

---

**Important**

If you’ve specified a foreman using the Foreman drop-down box, you do not need to add the foreman employee to the list of crew employees.
Removing Employees from a Crew

1. In the crew screen’s employees list, right-click the name of the employee you wish to remove. Select Remove Employee from the right-click menu.

2. A prompt appears asking you to confirm the remove command. Click OK. The employee’s name will disappear from the Employees list, and is therefore removed from the selected crew. This cannot be undone.

Viewing/Modifying Crews

To view a list of your crews in DynaSCAPE Manage, click View | Crews from the main menu drop-down menu. Your crews will load in the grid section of the main screen.

The View Tool presents two different methods for viewing crews:

The **Standard View** lists the crews in alphabetical order.

The **Crew (by Division)** view groups and sorts the crews by their assigned division.

To modify a crew, double click the crew you wish to modify. The crew screen will open, allowing you to make any changes necessary. For information on the crew screen or adding/deleting employees, consult the appropriate section(s) in this chapter.
Deleting a Crew

Deleting a crew will delete the DynaSCAPE Manage crew, but will not affect the individual employees in the crew or timesheets created with the crew. Employees and timesheets will remain, unchanged, in your database.

To delete a crew, you must open the crew from the main screen

1. If you’re not there already click View | Crews on the DynaSCAPE Manage main screen.

2. Double-click (open) the crew you wish to delete.

3. When the crew screen opens, click the Delete button to delete the crew.

4. A prompt appears asking you to confirm the delete command. Click Yes to delete the crew. Upon clicking Yes, the crew will be deleted from the database and you are returned to the DynaSCAPE Manage main screen.
In this chapter you will learn to:

- Understand the difference between a quote and a contract
- Interpret the contract screen
- Create an instant contract (work order)
- Job cost a contract
- Archive contracts
- Change contract statuses
- Delete contracts
Contracts vs. Quotes

Contracts are approved quotes. Once a quote has been approved to a contract timesheet and supplier invoice costs can be attributed to a job and invoices can be created for the customer.

Although contracts are “mutually agreed services for a price”, and the goal is to keep the contract as “true” as possible to the quote changes to the quantities and items are permitted.

Quotes show estimated costs and estimated revenues based on the structure and pricing of the collection of quote items. Quotes do not track any actual numbers. Contracts, on the other hand, track both estimated (expected) costs and revenues and actual costs and revenues. Contracts use timesheet and supplier invoice data to calculate precise costs for each contract and compare the costs against both estimated costs and actual revenues.

The Contract Screen

The contract screen is very similar to the quote screen, but with additional functionality. There are five separate tabs on the contract screen - each with its own set of unique information:

• General
• Contract Items
• Job Costing
• Costing Analysis
• Related Areas

The following sections will analyze each tab and its various components.
Contract Screen - General Tab

The general tab of the contract screen tracks all general information for a contract such as start date, customer name and jobsite.

Most fields are the same as the fields found on the general tab of the quote screen. This chapter will describe only the fields not found on the quote screen. For information on any fields not described here, see the Quotation - Overview chapter.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Number</td>
<td>Used to track a PO number for the approval of the contract where necessary [max 20 characters]</td>
</tr>
</tbody>
</table>
| Contract Payment Information| Invoice this contract manually: Invoices are created on an as-needed basis and without a fixed monthly payment amount. or Invoice this contract at a fixed rate of...: Enables the user to enter a monthly fixed invoice amount. Used for Maintenance-type contracts where term billing amounts are fixed at $X per term.
TABLE 1. Field List - Quote Screen - General Tab

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charge Bill Per Visit items per application</td>
<td>When bill per visit items are charged to invoices, calculate amount based on a per application/service price, not using the quantity gathered from the timesheet.</td>
</tr>
<tr>
<td>Charge Bill Per Visit items per units applied</td>
<td>When bill per visit items are charged to invoices, calculate the amount based on the actual quantity (labor or materials) used and not using a fixed (per application) price.</td>
</tr>
</tbody>
</table>
**Contract Screen—Contract Items Tab**

The contract items screen contains the same fields and functionality of the quote items screen. The contents of this section will only cover the tasks/information not included on the quote screen. To get a description of any fields not described here, refer to the chapter entitled Quotation—Overview.

There are only two differences between the contract items screen and the quote items screen:

**TABLE 2. Contract-specific Information**

<table>
<thead>
<tr>
<th>Contract Information</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>% Completed</td>
<td>A percent completed column has been added to the quote items grid. For construction-type contracts, this field must be entered manually and can be used to track the status of your jobs. For maintenance-type contracts, DynaSCAPE Manage automatically calculates the percentage completed based on the contracted number of visits and the actual number of visits (based on timesheet information).</td>
</tr>
</tbody>
</table>
**TABLE 3. Contract-specific Tasks**

<table>
<thead>
<tr>
<th>Contract Tasks</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create an invoice</td>
<td>Creates a customer invoice for the specified contract.</td>
</tr>
<tr>
<td>Replicate as quote</td>
<td>Creates a new quote based on the specified contract including all goods and services, but does not include any related timesheets, supplier invoices etc.</td>
</tr>
<tr>
<td></td>
<td>This task is useful for renewing maintenance contracts at the start of a new season.</td>
</tr>
<tr>
<td>Update Costs</td>
<td>The update costs task on the contract screen only updates the costs of goods and services. Prices are left intact with the assumption that prices have been agreed upon with the customer and should not be automatically overridden.</td>
</tr>
</tbody>
</table>

**Contract Screen—Job Costing Tab**

The job costing tab illustrates estimated vs. actual costs for each distinct profit center on the contract. Each profit center is split into estimated vs. actual costs and by item type. For instance, if “Softscape installation” is one of your profit centers, the job costing tab enables you to view the estimated labor hours and costs for the softscape
installation vs. the actual number of labor hours and costs. You can also view equipment, material, subcontracting and general conditions breakdowns as well.

Each profit center is listed as a row on the job costing grid. Each column represents information about the profit centers (estimated labor hours, actual material costs, etc.). Use the scroll bar at the bottom of the grid to view all the available columns. The last column in the grid is the gross profit margin per profit center.

The information contained within the job costing grid is an extremely useful tool for analyzing discrepancies on a job. Should a job significantly exceed or fall short of its targets, the job costing panel uses colored cells to demonstrate exactly where the discrepancies occurred. Red cells indicate that costs/hours exceeded estimates and green cells demonstrate areas where costs/hours were less than their estimated amounts.

At the bottom of the job costing tab is summary cost/profit information for the contract. Total costs are subtracted from total invoice amounts, leaving a gross profit figure and a gross profit margin for the contract as a whole.

**Contract Screen—Costing Analysis**

The costing analysis screen is designed to help you study, improve, and fine tune your estimation procedures.

The top half of the costing analysis screen is dedicated to estimated costs. The chart and figures displayed in the **Estimated Costs** section mirrors the chart displayed on
the Cost/Profit Analysis tab back when the contract was a quote. These figures were the estimated costs of each item type (labor, softscapes, equipment, etc.) as gathered from the price list screen and including any manual adjustments to individual costs on either the quote or contract screens.

The bottom half of the costing analysis screen displays actual costs. The Actual Costs pie chart and figures reflect the true costs of the contract as calculated from timesheets and supplier invoices. Each item type is broken down individually and all costs and gross profits are shown in a pie graph as a proportion the contract’s total revenue.

![Cost/Profit Analysis Screen](image)

**Contract Screen - Related Areas**

The Related Areas tab of the contract screen is your gateway to any information related to the selected contract.

Any timesheet, supplier invoice or customer invoice that has a relation to the selected contract will automatically appear in the related areas section of the contract screen. This is a useful tool for locating timesheets or supplier invoices relating to a specific contract as all related materials are displayed in chronological order starting with the most recent.
To examine any timesheet, supplier invoice, or customer invoice, click its name and the selected screen will open.

**Contract Screen - Contract Events**

The Contract Events screen gives a calendar view of the activities related to the particular contract being viewed.
DynaSCAPE Manage (version 4.5)

Contact events include Scheduled Work, Timesheets, Supplier Invoices and Customer Invoices. The Contract Events screen will open showing the current month’s activities. If you wish to see activities of past or future months, use the arrows (< or >) to move through individual months.

Under Relevant Tasks in the taskbar you can schedule the current job, find specific activities related to this job (i.e. Timesheets, Customer Invoices) or view the months in which the first or last events occurred.

**Schedule Job**

To add the current contract to the schedule, click on the Schedule Job option under Relevant Tasks. This will open the Schedule Information panel. Select the crew(s) that will be completing this job, select the starting date and click Save & Close. The contract will appear on the schedule. For more detailed information refer to the chapter called Scheduling and Routing.

![Schedule Information Panel](image)

**Find Event**

To find specific events for this contracts such as time sheets, click on the Find Event option under Relevant Tasks. In the panel that appears, type in the event you wish to find and click Find. If you entered ‘timesheet’, a list of all the timesheets for this job.
will be listed. Double-click on a timesheet if you wish to open and view it. The More Choices and Advanced tabs can be used to further refine the search if necessary.

Find First or Last Event

To view the month in which the first event of this contract occurred, click on the Find first event option under Relevant Tasks. To view the month in which the last event of this contract occurred, click on the Find last event option.

Creating a Contract

There are two methods of creating a contract:

1. Approving an existing quote.
2. Creating a work order (a contract that never exists as a quote).

To learn about creating a contract by approving a quote, see the chapter entitled Creating Quotes.

1. To create a work order, start from the Contracts section of the DynaSCAPE Manage main screen.
2. Click the Create a Work Order task.

3. The New Work Order wizard appears. Select the division for the contract you wish to create. (Remember: the selected division will use its division type to determine whether the contract is a maintenance-type or construction-type contract) Click Next.
4. Select the customer name, then jobsite name from the drop-down boxes. Enter a descriptive name for the contract. Click **Next**.

5. Click **Finish** to create a new contract.

A new contract screen will appear without any items attached. The contract will function just like any other contract, except that it never existed as a quote. Add any items or kits required to the contract items tab of the screen.
Editing a Contract

Despite the fact that contracts represent a strict agreement on prices and services, items can be added or edited on the contract screen at any time. The green industry is frequently confronted with situations that require additions, amendments and substitutions; all of which are fully permissible in DynaSCAPE Manage.

Editing contract information is performed precisely the same way as you would edit quote information. To learn more about editing contracts and their items, refer to the Creating Quotes and Editing Quotes - Advanced Tools chapters.

Setting up Contract Items for Invoicing (Maintenance-type Contracts)

There are many different scenarios for maintenance-type invoicing. Contracts can be charged flat rates per month, flat rates plus materials, time and materials, or per application. Using a combination of several controls, DynaSCAPE Manage can handle most invoicing situations effectively. Here are the basic fundamentals to keep in mind.

- To bill a flat monthly rate, select the Invoice this contract at a fixed rate of _____ per period option on the General tab of contract screen. Enter the flat rate in the space provided.
- Any items on the contract that do not have the Bill Per Visit flag checked will be included in the monthly flat rate (should one be specified).
- Any items that do have the Bill Per Visit flag checked can be automatically billed either by application or by units applied. The Contract Payment Information section on the General tab of the contract screen determines whether the items are charged an application price or a per unit price.

If the contract is billed per application, DynaSCAPE Manage will charge the contracted quantity multiplied by the contracted unit price for each un-invoiced occurrence of the service on a timesheet.

If the contract is billed per units applied, DynaSCAPE Manage will automatically use the units (hours or material units) from the timesheet records and multiply the timesheet quantity by the contracted unit price.
Archiving Contracts

DynaSCAPE Manage makes it simple to archive contracts that you do not wish to delete, but that are also not considered necessary for everyday reference.

At the end of a job or season, archiving contracts is an easy way to ‘hide’ old contracts that you no longer need to reference without deleting the historical record of the contract and the work completed.

Archiving a Single Contract

To archive a single contract, open the contract screen for the contract you wish to archive.

Place a checkmark in the Archived checkbox.
A message box appears prompting you to confirm your decision to archive the contract. Click Yes to archive the contract.

The message box disappears and the Archived checkbox is marked with a check. When the selected contract is saved (and closed), the contract will disappear from the contracts section of the DynaSCAPE Manage main screen. To include archived contracts in the DynaSCAPE Manage main screen list, simply place a check mark in the Show archived data box (see the DynaSCAPE Manage Main Screen chapter for complete instructions).

Archiving Multiple Contracts at Once

To archive a group of selected contracts at once, start from the contracts section of the DynaSCAPE Manage main screen:

1. Hold [Shift] or [Ctrl] while clicking quotes to select multiple contracts at once. Right-click any of the selected contracts.

2. Choose the Archive option from the pop-up menu.
3. The **Archive Wizard** appears. Ensure the option to **Archive all selected contracts** is selected.

![Archive Wizard](image)

4. Click **Archive** to archive all selected contracts.

All selected contracts will be archived and will no longer appear on the contracts section of the DynaSCAPE Manage main screen unless the **Show archived data** box is checked. When shown, archived data will appear shaded to indicate its archived status.

### Changing Contract Status for Groups of Contracts

DynaSCAPE Manage tools enable you to change the status for a group of selected contracts to save you the time of changing individual contract statuses one at a time.

To change the statuses for a group of selected contracts:

1. Start from the **Contracts** section of the goods and services screen.

2. Hold down **[Ctrl]** or **[Shift]** while clicking contracts to select multiple contracts at once.
3. Right-click any of the selected contracts and select the menu option to **Edit Status**.

![Edit Status Wizard](image)

4. The **Edit Status Wizard** appears. Use the drop-down box to select a new status for the selected contracts.

![Edit Status Wizard](image)

5. Click the **Apply Status** button to change the status for all selected contracts.

The statuses for all selected contracts are updated to the newly selected contract status and the changes are immediately visible on the DynaSCAPE Manage main screen.
Deleting Contracts

Multiple contracts cannot be deleted at once. To protect contracts from accidental deletion, contracts must be opened using the contract screen and deleted individually.

**Important**

Contracts *cannot* be deleted if they have been referenced on timesheets, supplier invoices, or contract invoices. If a contract’s information is being used in another area of DynaSCAPE Manage, DynaSCAPE Manage will not allow the contract to be deleted. If you wish to hide older contracts from view, see the section in this chapter entitled *Archiving Contracts*.

To delete a single, unassociated contract, simply click the **Delete** button on the contract screen, then click **OK** to confirm the deletion.
In this chapter you will learn to:

- Configure the next quote/contract reference number
- Set the default sorting criteria for quote/contract items

There are a few quote/contract configurations that you can use to suit your own organization.

Quote reference numbers can be set to start at any point, allowing you to create custom sets of reference numbers or enabling you to assume control over an existing numerical system. Quotes or contracts can also be set to sort by a given criteria each time the screen is opened - select the sorting methodology that best suits your needs.
Configuring Quote/Contract Reference Number

Each time a quote or contract is created, it is automatically assigned a reference number. The reference number automatically increases incrementally by one each time it is used.

To set the starting or ‘next’ reference number to be assigned, follow these instructions.

1. Close any open quote and contract windows. From the file menu, select Configuration | Quote/Contract Configuration.
2. The **Quote/Contract Configuration** screen appears. Enter the next quote/contract reference number to be assigned in the designated box (must be numeric).

![Configure Quotes and Contracts](image)

3. Click **Save & Close**.

### Configuring Default Sorting Criteria

By configuring the default sorting criteria, you can set quotes to sort their data, by default, each time you open a quote screen. DynaSCAPE Quote/Manage enables you to change the sorting criteria once the quote screen is opened, but will default the sort to the methodology specified in the Quote/Contract Configuration section.
1. Close any quote and contract windows. From the file menu, select **Configuration | Quote/Contract Configuration**.

2. The **Quote/Contract Configuration** screen appears. From the list of available options, select the default sort criteria that best suits your business.

3. Click **Save & Close**.
In this chapter you will learn to:

- Understand timesheets and the timesheet screen
- Create a timesheet
- Add labor, equipment, and materials to a timesheet
- Understand the effect of timesheets on contract job costing
- Export timesheets to Microsoft Excel
- Create scheduled timesheets
- Archive timesheets
- Delete timesheets
# Introduction to Timesheets

In a typical office, timesheets are used to track employee hours and the times and locations of their work. Timesheets are used to record employee hours against a job, but can also be used to track equipment usage times and material allocations.

Each time labor, equipment hours or materials are allocated to a job, DynaSCAPE Manage will automatically apply the costs of each to the contract. By using actual time and wage data, DynaSCAPE Manage can extract an accurate comparison between estimated and actual costs for a given contract. Timesheets can also be printed individually, printed as time reports and exported to Microsoft Excel.

Let's begin looking at timesheets by examining the timesheet screen and how to access it.

To view a list of all your timesheets, click the **Timesheets** link on the DynaSCAPE Manage shortcut bar or on the **Timesheets** icon on the DynaSCAPE main page.

A list of timesheets is displayed, including the title, the work date, the division and the posted status (indicates if the timesheet has been exported to your accounting software).
Timesheet Screen—Labor Tab

The labor tab of the timesheet screen is used for tracking employee hours. The various tasks (contract labor items) are listed as rows in the main grid. Each employee has its own column. The hours are filled in the cells where the rows (tasks) meet the columns (employees). Access the timesheet window by double-clicking on the desired timesheet in the main timesheet screen.
The Timesheet Information and Labor Information sections compose most of the Labor tab on the timesheet screen. To get a better understanding of what each section means, let’s examine each field on the screen.

### TABLE 1. Field List - Timesheet Screen - Labor

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>A descriptive name for the timesheet. The work date is listed along with the name so it’s not necessary to include the timesheet’s date in the title. Timesheet descriptions should strive to give the user a rough idea of what jobsites were visited and who visited them. <strong>Develop a standard naming format for timesheets.</strong> When completed daily, timesheets will easily surpass any other area of DynaSCAPE Manage in terms of volume. Searching through timesheets for information is much more efficient when timesheets are effectively and consistently named.</td>
</tr>
<tr>
<td><strong>Division</strong></td>
<td>The division for the current timesheet. By default, only contracts in the same division as the timesheet will appear when adding contract tasks to the timesheet.</td>
</tr>
<tr>
<td><strong>Work Date</strong></td>
<td>The date on which the timesheet tasks were performed.</td>
</tr>
<tr>
<td><strong>Exported</strong></td>
<td>A checkbox indicating whether or not the timesheet has been exported to accounting.</td>
</tr>
<tr>
<td><strong>Contract Item</strong></td>
<td>The task (labor item) from the contract at which work is being performed. Contract item descriptions are composed of the Work Area, the Profit Center, and the name of the labor item.</td>
</tr>
<tr>
<td><strong>Visit</strong></td>
<td>A checkbox indicating whether the task counts as a visit. This field is useful for contract items on maintenance contracts that are flagged as Bill Per Visit. The timesheet Visit field allows you to determine whether or not a specific task should be counted as a visit and, if applicable, automatically included on the invoice. To exclude the selected task from being included in the billing or being counted as a visit, simply uncheck the Visit box.</td>
</tr>
<tr>
<td><strong>Billed</strong></td>
<td>A checkbox indicating whether the timesheet task has been billed on a customer invoice. Again, this field is used by Bill Per Visit contract items found on maintenance contacts. The Billed checkbox will automatically be marked for any visits included on a customer invoice, but you can override the setting if necessary.</td>
</tr>
</tbody>
</table>

The following data fields are listed as columns in the Labor Information section of the timesheet screen.
Besides information fields, the timesheet screen also contains a number of tasks that can be performed.

**TABLE 1. Field List - Timesheet Screen - Labor**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments</td>
<td>Used for entering descriptive comments about a timesheet task.</td>
</tr>
<tr>
<td>Total</td>
<td>The total number of hours spent on the task by all employees on the timesheet.</td>
</tr>
<tr>
<td>Employee Names</td>
<td>Fill the time spent on tasks where the employee name column meets the task (contract item) row.</td>
</tr>
</tbody>
</table>

**TABLE 2. Task List - Timesheet Screen - Labor**

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save this timesheet as a scheduled timesheet</strong></td>
<td>Used by maintenance companies to quickly create timesheets. If a consistent route has been established, you can save the set of contracts and tasks as a ‘scheduled timesheet’. Each time the route is performed, simply load the timesheet from the ‘scheduled timesheet’ and all your contracts and tasks are automatically included on the timesheet for you.</td>
</tr>
<tr>
<td><strong>Add employees</strong></td>
<td>Click the <strong>Add Employees</strong> task to toggle a window allowing you to add employees to the timesheet.</td>
</tr>
<tr>
<td><strong>Add contract items</strong></td>
<td>Toggles a window allowing you to add labor-type contract items (tasks) to the timesheet.</td>
</tr>
<tr>
<td><strong>Export timesheet to QuickBooks</strong></td>
<td>Opens the timesheet export Wizard. Timesheets can either be exported by individual tasks or entire timesheets. More detail can be found in the <strong>Linking with QuickBooks</strong> chapter.</td>
</tr>
<tr>
<td><strong>Send this timesheet to Microsoft Excel</strong></td>
<td>Exports the timesheet into a Microsoft Excel spreadsheet suitable for editing and printing.</td>
</tr>
<tr>
<td><strong>Print timesheets</strong></td>
<td>Enables you to print the timesheet to a report.</td>
</tr>
</tbody>
</table>
**Timesheet Screen—Equipment Tab**

Equipment hours can also be tracked on timesheets. By tracking your equipment hours you can better track and calculate equipment costs, but DynaSCAPE Manage will also automatically apply the costs of equipment usage to specific contracts.

Like the labor tab, the contract items (tasks or equipment) are listed as rows and the actual pieces of equipment are listed as columns. Enter the equipment hours in the cells where the columns and rows intersect.

**Timesheet Screen—Materials Tab**

Materials can also be allocated to jobs via timesheets. The vast majority of material expenses should be allocated using supplier invoices. Dragging a long list of materials into a timesheet is neither a practical nor an efficient means of allocating individual material costs. However, when dealing with materials that are purchased in bulk, allocating materials with timesheets can be a useful tool. Use this section of the timesheet to keep track of these materials as they are taken from your yard.

Bulk materials, such as salt or fertilizer are ideally allocated using the timesheet materials tab. Instead of drawing up a supplier invoice for each application of bulk
material, it is much simpler to allocate it using the materials tab of the timesheet screen.
Creating a Timesheet

To create a new timesheet, follow these instructions:

Start from the Timesheets section of the DynaSCAPE Manage main screen.

1. Click the task entitled Create a new Timesheet.

2. The New Timesheet Wizard appears. Select the option to Create a new timesheet. Click Next.
3. Select the division and work date for the new timesheet using the available drop-down boxes. Enter a description for the new timesheet in the appropriate box. Click **Next**.

4. Click **Finish** to create the new timesheet.

A new timesheet appears on the screen. The timesheet is now ready to track labor, equipment and materials for contracts.
Adding Contract Items to Timesheets

To add contract items to a timesheet (labor, equipment, or materials sections), the following rules must be followed.

1. Only contract labor items can be added to the labor section of a timesheet. If the contract has no labor items, you will not be able to track employee time against the contract.
2. You can add contract equipment items or contract labor items to the equipment section of the timesheet. Some businesses elect to include all equipment in the price of their labor. DynaSCAPE Manage will allow you to allocate equipment costs to labor items, thereby allowing you to include equipment in your labor prices, yet still be able to allocate equipment costs effectively.
3. You can add contract material items or labor items to the materials section of a timesheet. Again, some contracts are structured to include the price of materials in a given labor (service) price. DynaSCAPE Manage allows you to allocate materials to a contract labor item, enabling you to include all materials in the job costing process.

To add contract items to any of the various sections (labor, equipment, or materials), start from the desired tab on the timesheet screen.

1. Click the task entitled *Add contract items*.

2. A window appears on the right side of the timesheet screen listing all non-archived contracts of the same division as the timesheet.
3. The contract items are listed by jobsite name, then by contract name and reference number. Each contract lists their relevant contract items below it. Contract item types are identified by the icon preceding each contract item. In addition to the icon, contract items are identified by work area (construction-type quotes only), then by profit center, then by item name.

4. Locate the contract item you wish to add to the timesheet, then drag and drop its name into the timesheet.

5. A contract header appears showing the contract reference number and name of the contract item just added to the contract. Underneath the
header is the contract item row added, along with visit, billed comments and total hours information.

6. Continue adding contract items as necessary. You may add any number of contract items from any number of different contracts to the same timesheet. Once you have added all your contracts and items, you can put your contracts in logical order by dragging and dropping the row headers for contracts that need to be repositioned.

Tips and Tricks

To add all the labor items for a given contract, simply drag and drop the contract name (instead of the item names) into the timesheet labor grid. Once a contract name has been selected, DynaSCAPE Manage will automatically add all labor items for the specified contract to the grid.

Adding Employees/Equipment/Materials to Timesheets

Adding employees/equipment/materials to timesheets is performed using exactly the same processes used to add contract items, except that we’re adding columns instead of rows.
Whether you are adding employees, equipment or materials is dependent on the tab you using on the timesheet screen. If you are using the **Labor** tab, you add employees to the grid. If you are using the **Equipment** tab, you are adding equipment and when using the **Materials** tab, you are adding materials. Each section is distinct from one another. You do not have to add the same contracts or contract items to the labor section as you do to the materials section.

The methodologies for adding equipment, materials, or timesheets are all the same. For the purposes of an example, we’ll demonstrate adding employees to the timesheet, but the same procedures are used to add either equipment to the equipment tab or materials to the materials tab.

1. To add an employee to the timesheet, click the **Add Employees** button.

2. An employee tool window appears on the right hand side of screen. Employees are grouped by crews (where applicable), and listed in
descending alphabetical order. Drag and drop the employee names that you wish to add to the timesheet.

3. After dropping the employee name, DynaSCAPE Manage creates a new column on the timesheet for the employee.
Once the employee is added, you now have the opportunity to enter employee hours against tasks (contract labor items). You may add as many unique employees as you need to the timesheet. An entire crew can be added simply by dragging the entire crew to the timesheet.

---

**Tips and Tricks**

Although you can add any number of employees and contracts to a timesheet, it’s best practice to keep your timesheets crew specific. The number of timesheets will increase, but filling out and sorting through timesheet information is much simpler with a logical, limited set of data.

---

**Shortcut for Adding Equipment & Materials**

When adding labor to a timesheet, it is impossible to estimate who performed a task and how long they spent doing it. However, when adding equipment or material, DynaSCAPE Manage knows the type of equipment or material based on the contract item. Therefore, when adding contract items (equipment and material types), DynaSCAPE Manage will automatically add the equipment/material columns for you.

For example, start from the Equipment tab of timesheet screen. Click the **Add contract items** task.
Drag and drop an equipment item from the contract into the equipment allocation grid. DynaSCAPE Manage automatically inserts a contract item row as well as the appropriate equipment column.

DynaSCAPE Manage will even default the allocated quantity (hours or material units) for you, based on the contract estimate. If the quantity varies from the estimate, simply edit the appropriate cell after the contract item and equipment/material have been added.
Effects of Timesheets on Jobcosting

As you allocate labor, equipment and materials to jobsites, contracts begin to accumulate the associated **actual** costs of such allocations. Each cost is calculated as follows.

**TABLE 3. Calculating Actual Costs**

<table>
<thead>
<tr>
<th>Cost Type</th>
<th>Calculation Method</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Labor (Employees)</strong></td>
<td>Actual labor costs from timesheets are calculated using the employees <strong>total cost</strong> (see the chapter Employees) for a complete description and explanation of the total cost field. Note that the employee's <strong>wage</strong> is not used, but the total cost. When you add an employee to a timesheet, at that precise moment, the employee's total cost is stored in the hidden workings of the timesheet. Future changes to the employee's wages will not affect jobcosting data. The total cost, multiplied by the number of allocated hours, is applied as an <strong>actual labor cost</strong> against the contract. This way, not only is DynaSCAPE Manage calculating actual costs using real time data, but it is also using specific wage data to give very accurate actual costing results.</td>
</tr>
<tr>
<td><strong>Equipment</strong></td>
<td>At the moment equipment is added to a timesheet, DynaSCAPE Manage reads the equipment's default cost from the Price List section and stores this cost in a hidden field. Future changes to the equipment's default cost will not affect the timesheet's costing data. The equipment's cost is then multiplied by the allocated hours, then applied against the contract as an actual equipment cost.</td>
</tr>
<tr>
<td><strong>Materials</strong></td>
<td>At the moment material is added to a timesheet, DynaSCAPE Manage reads the material's default cost from the Price List section and stores this cost in a hidden field. Future changes to the material's default cost will not affect the timesheet's costing data. The material's cost is then multiplied by the allocated quantity, then applied against the contract as an actual material cost.</td>
</tr>
</tbody>
</table>

To view the effects of a labor, equipment, or material allocation on a timesheet, refer back to the contract screen for the contract to which you have allocated costs.

Open the contract screen, then click the **Job Costing** tab.
Study the **Actual** fields. Actual time and costs will begin to accumulate based on your allocation of costs on the timesheet screen.

Click the **Costing Analysis** tab to view the results of your timesheet allocations.

The total contract actual costs will accumulate accordingly. The estimated costs can be compared with the actual costs, however, this will not be complete until the job is finished.
4.19

Exporting Timesheets to Microsoft Excel

Exporting timesheets to Microsoft Excel is a useful tool for printing out timesheets for your crews to complete. By printing DynaSCAPE Manage timesheets, the layout of the timesheet screen will match the layout of the timesheet report decreasing the likelihood of data errors and increasing the speed and efficiency of timesheet entry.

Also by printing jobsite names, addresses, tasks and even expected completion times, the work crews need to do nothing more than enter the their times in the space that corresponds with their name and the task they completed.

To export a timesheet to Microsoft Excel, follow these instructions:

1. Open the timesheet screen for the timesheet you wish to export/print. Click the task entitled **Send this timesheet to Microsoft Excel**.

![Timesheet Screen](image)

2. The **Timesheet Wizard** appears on your screen.
3. There are three options on the timesheet wizard. Select any of the desired options by placing a checkmark in the box beside the option name.

**TABLE 4. Timesheet Wizard Options**

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export any employee hours that have been entered for each task</td>
<td>When this option is selected, DynaSCAPE Manage will print any allocated hours on the Microsoft Excel spreadsheet. Used for making a printout of a timesheet that has already been completed. Left unselected, DynaSCAPE Manage will leave allocation cells blank so that they can be filled in manually on a printed copy.</td>
</tr>
<tr>
<td>Display expected hours in my spreadsheet</td>
<td>When selected, this option will print the expected completion times for each task on the contract. Printing expected hours can be a useful tool in identifying and preventing estimation and logistical problems before they become a factor.</td>
</tr>
<tr>
<td>Display equipment for timetracking</td>
<td>When selected this option will include equipment items on the spreadsheet for timetracking.</td>
</tr>
</tbody>
</table>

After the appropriate options are selected, click the **Export** button.
Microsoft Excel opens to a new spreadsheet. Over the next several seconds DynaSCAPE Manage will generate and create a new spreadsheet based on your timesheet.

Once your Microsoft Excel spreadsheet has been generated, you can edit, save, and print the spreadsheet just like you would any other Microsoft Excel spreadsheet.
Scheduled Timesheets

Scheduled timesheets are timesheets consisting of recurring contracts and their associated tasks. For instance, if Crew X does the same route every Monday, you can create a scheduled timesheet for this Crew’s Monday route. Instead of having to re-create the list of contracts and their items each Monday, the scheduled timesheet will load with all the jobsites and tasks. All you have to do is add employees and allocate the times.

Creating a Scheduled Timesheet

Create a scheduled timesheet as follows:

1. Start with a new timesheet and add all the contracts and items which are consistently performed for the given day. If you wish, you may also add the expected employees. Scheduled timesheets can save default employees that can be changed on actual timesheets if necessary.

2. Once all the contracts have been added, click the task entitled Save this timesheet as scheduled timesheet.
3. The Timesheet Template wizard appears. Enter a name for the scheduled timesheet.

![Timesheet Template Wizard]

4. Click Next, the click Finish. The timesheet is now saved as a scheduled timesheet.

Creating a New Timesheet Using a Scheduled Timesheet

To create a new timesheet based on a scheduled timesheet, follow these instructions:

1. Start from the timesheets section of the DynaSCAPE Manage main screen. Click the Create a new timesheet task.

2. When the New Timesheet Wizard appears, select the option entitled Create from scheduled timesheet.

3. Use the drop down box to select the name of the scheduled timesheet to use. Click Next.

![New Timesheet Wizard]
4. Set the work date and enter a descriptive name for the new timesheet.

![New Timesheet Wizard](image)

5. Click **Next** then click **Finish**. A new timesheet is created using the scheduled timesheet's list of contracts and employees.

![Timesheet](image)

Now you can make any necessary adjustments to the timesheet (change employees, add/delete contracts/tasks) and begin allocating hours.
Archiving Timesheets

As discussed in earlier sections of this manual, archiving objects allows you to ‘hide’ them from everyday view, without deleting them from your database. Due to the volume of timesheets that can rapidly accumulate over a season, archiving your timesheets on a semi-regular basis is strongly recommended.

Archiving a Single Timesheet

To archive a single timesheet, start from the timesheet screen for the timesheet you wish to archive.

Click the Archive checkbox in the bottom left hand corner of the timesheet screen.

A message appears prompting you to confirm your decision to archive the selected timesheet. Click Yes.

The timesheet is flagged as archived and, upon saving and closing your changes, will only be shown when you elect to view archived timesheets.
Archiving Multiple Timesheets

Archiving multiple timesheets is done from the DynaSCAPE Manage main screen.

1. Start from the timesheets section of the DynaSCAPE Manage main Timesheets screen. Hold down [Ctrl] or [Shift] while clicking timesheets to select the timesheets you wish to archive.

2. After you’ve selected all the timesheets you wish to archive, right-click any of the selected timesheets and click the menu option entitled Archive.

3. The Add to Archive wizard appears. Make sure the option to Archive all selected timesheets is selected. Click Archive.

The selected timesheets disappear from the DynaSCAPE Manage Timesheets screen. Check the Show archived data box to view the archived Timesheets.
Deleting Timesheets

To prevent the accidental loss of sensitive data, deleting multiple timesheets at once is not permitted. To delete a single timesheet, open the timesheet screen that you wish to delete and click the **Delete** button. Confirm the deletion to complete the process.
In this chapter you will learn to:

- Display appropriate materials and equipment only
- Automatically add contract materials or equipment
- Automatically add all items from kits

The timesheet configuration screen is relatively simple, but can offer your company some advantages in terms of speed and efficiency.

Since installing DynaSCAPE Manage, Brenda’s office wants to track equipment hours as well as labor hours, but didn’t want to double the time of entering daily timesheets. Once Brenda learned how to automatically add equipment while adding contract labor items, the office was able to begin tracking equipment hours without sacrificing any more office efficiency than warranted.
Accessing Timesheet Configuration Options

To access the Timesheet Configuration screen, select the Configuration | Timesheet Configuration option from the menu.

Important

You must close any open timesheet screens before adjusting and saving any of the timesheet configuration options.

Displaying Appropriate Equipment/Material

There are times when allocating either equipment or materials to timesheets when it is not necessary to select from the entire catalog of items. Using the configuration screen DynaSCAPE Manage can be configured to only show division-specific materials or equipment. This way, when working on with a Snow & Ice timesheet (an example company division), DynaSCAPE Manage will only display, equipment/materials whose profit centers belong to the Snow & Ice company division.
To display division relevant equipment and materials, simply check the appropriate Timesheet Configuration Information options.

Automatically Adding Contract Equipment Or Materials

You can configure DynaSCAPE Manage timesheets to automatically add contract equipment or materials when adding a contract to the labor section of a timesheet. This setting will save you the time of adding the same contract to the three different allocation screens.
To instruct DynaSCAPE Manage to automatically include equipment and materials for timesheet allocation, place checks in the appropriate **Adding Contract Items to Timesheets** checkboxes.

---

**Important**

*You must drag the name of the contract (the entire contract) into the labor section of the timesheet grid for equipment/materials items to be automatically added as well.*

---

**Automatically Adding Kits To Timesheets**

When adding primary (variable component) kit components to a timesheet, DynaSCAPE Manage can automatically add all the standard components to their necessary allocation sections. You can elect to ignore other kit components, optionally add other items, or always add other kit components.
Select the appropriate option in the **Kits and Timesheets** section of the Timesheet Configuration Screen.
6
Supplier Invoices

In this chapter you will learn to:

 ✓ Understand Supplier Invoices
 ✓ Use the Supplier Invoice screen
 ✓ Create a Supplier Invoice
 ✓ Add and allocate items to a Supplier Invoice
 ✓ Use Supplier Invoices for Job Costing
 ✓ View/modify Supplier Invoices
 ✓ Use Recurring Supplier Invoices
 ✓ Print Supplier Invoices
 ✓ Archive or Delete Supplier Invoices
Understanding Supplier Invoices

The Supplier Invoice module in DynaSCAPE Manage enables you to enter the information from an invoice you receive from your supplier. You are then able to allocate items from that supplier to an existing contract. DynaSCAPE Manage uses this information to compare the estimated cost for materials, equipment and sub-contractors to the actual cost of items that were purchased or used in the completion of a contract.

The Supplier Invoice Screen

The Supplier Invoice screen captures relevant details from a supplier’s invoice and provides an easy way to allocate these costs against items on a contract. Let’s take a look at the Supplier and it’s various components.

![Supplier Invoice Screen](image)
### TABLE 1. Field List - Supplier Invoice Screen

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supplier</strong></td>
<td>This field captures the name of the Supplier from which the invoice was received. The supplier name is picked from a list of suppliers.</td>
</tr>
<tr>
<td><strong>Invoice Number</strong></td>
<td>The number on the invoice issued by your supplier.</td>
</tr>
<tr>
<td><strong>Invoice Date</strong></td>
<td>The date the invoice was issued to you.</td>
</tr>
<tr>
<td><strong>PO Number</strong></td>
<td>The Purchase Order number for this invoice. <em>(Note: This number can be assigned automatically by DynaSCAPE Manage.)</em></td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Allows you to keep track of whether or not an invoice has been allocated, whether or not it has been paid, and any other purpose you might wish to use this field for. To add additional options to this list, see the section entitled Control Codes in the chapter on Configuring DynaSCAPE Manage.</td>
</tr>
<tr>
<td><strong>Comments</strong></td>
<td>This field can be used to add any notes to yourself, or to transfer notes that appear on the supplier invoice.</td>
</tr>
<tr>
<td><strong>Accounting Status</strong></td>
<td>Indicates whether or not the invoice has been posted to QuickBooks.</td>
</tr>
<tr>
<td>** Archived**</td>
<td>When checked, marks this supplier invoice as archived.</td>
</tr>
</tbody>
</table>

The following is a description of each column found in the supplier invoice items grid.

<table>
<thead>
<tr>
<th>Description</th>
<th>Description of the item that was purchased from the supplier. This information corresponds to a line on the physical invoice.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Allocated to</strong></td>
<td>From the list of contract items, this field records which item you wish to allocate the invoice item to. <em>(Note: This will be discussed in further detail later in this chapter.)</em></td>
</tr>
<tr>
<td><strong>Quantity</strong></td>
<td>The quantity of the item purchased from the supplier.</td>
</tr>
<tr>
<td><strong>Unit Price</strong></td>
<td>This field records the amount that was paid for each unit purchased. This amount will be allocated to the contract item specified and applied to the costs for the job.</td>
</tr>
</tbody>
</table>
Creating Supplier Invoices

To create a Supplier Invoice, start from the main screen.

1. Click on Supplier Invoices on the shortcut bar, and then click the task entitled New Supplier Invoice

TABLE 1. Field List - Supplier Invoice Screen

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extended Price</td>
<td>This is a calculated field of the total amount paid for the items (calculated by multiplying the quantity by the unit price). - Read-only.</td>
</tr>
<tr>
<td>Tax</td>
<td>Indicates the tax paid on the item.</td>
</tr>
</tbody>
</table>
2. The New Supplier Invoice Wizard appears. Select the option to Create a new supplier invoice. Click Next.

3. Select the Supplier from the available drop-down box. If the supplier does not exist in the list, you will need to first create the supplier. Click [Cancel] to exit the wizard, and create the supplier record first. See the chapter entitled Suppliers for instructions on creating a new supplier.

4. Enter the Invoice Number and PO Number into the available boxes. If you like, DynaSCAPE Manage can automatically assign a PO Number for you. See the section of this chapter entitled Supplier Invoice Configuration for further information on PO Numbers in DynaSCAPE Manage. Use the calendar to select the Invoice Date, and click Next. If an Invoice Number for a particular Supplier is entered that already exists in Manage, a window will pop up indicating this. Click Yes to continue or No to create a new Invoice Number.

5. Click Finish to create the Supplier Invoice.
A new Supplier Invoice record appears on screen. You will now be able to enter items from the original paper copy and allocate the items to contract items in order to begin tracking the actual costs of the items in each contract.

**Adding and Allocating Items on Supplier Invoices**

1. To add a new line to the supplier invoice, double-click the row marked with an asterisk. A new line is added to the supplier invoice (indicated with a pencil icon). Enter the information for the new invoice line item or press [Esc] to cancel the action.

2. In the **Description** field, type the name of the item from your supplier invoice.

3. Use your tab key to move to the **Quantity** field (or click in the **Quantity** field with your mouse) and enter the number of items to be allocated.

4. Move to the **Unit Price** and enter the amount for each unit. Move to the Tax field to indicate the type of taxes paid for the item. Select the QuickBooks Expense account in the Account dropdown (only available if the QuickBooks setup has been run and QuickBooks Expense accounts have been imported into DynaSCAPE Manage).
Repeat the above steps for each item to be added to this supplier invoice. You are now ready to allocate contract items to this invoice.

1. From the Tasks section, click on the option entitled **Allocate contract items to this invoice**.

2. A list of contracts appears to the right of the screen.
3. Navigate to the contract to which you wish to allocate items by clicking the [+] sign to expand the customer and then contract.

4. Drag and drop the contract item to be allocated onto the corresponding item on the supplier invoice. The item name will appear in the yellow box entitled Allocated To. The amount entered into the Unit Price field will now be allocated to the item specified in the Allocated To field, so that you can compare the true cost of the item to the estimated cost from the Contract. Repeat this step for each additional item you wish to allocate.

**Tips and Tricks**

You can combine the steps of adding items and allocating items into one by simply dragging contract items into a new line on your Supplier Invoice. This will add the item, quantity and price, and allocate it at the same time. Simply verify the quantity and price after you have dragged the item onto your supplier invoice.

**Using Recurring Supplier Invoices**

Often times you will purchase material from a supplier on a regular basis, and the invoice will look more or less identical each time. In order to save you time, DynaSCAPE Manage allows you to create a Supplier Invoice template which eliminates the need to create the identical Supplier Invoice each time.
To create a recurring supplier invoice, follow these steps:

1. Create a Supplier Invoice as per the instructions given earlier in this chapter.

2. From the Tasks section, click the option entitled **Save as recurring supplier invoice**.

3. The **Supplier Invoice Template** wizard appears. Enter a description for this template, and click **Next**.

4. Click **Finish** to create your supplier invoice template.

Now that you have created a template, you can use this template when creating a new supplier invoice:

1. Click on **Supplier Invoices** on the shortcut bar, and then click the task entitled **New Supplier Invoice**.
2. The New Supplier Invoice Wizard appears. To select the template you wish to use, click the option entitled **Load a recurring supplier invoice from template**, and select the template from the drop-down.

3. Click **Next** to proceed. Continue following the instructions as described in the section of this chapter entitled **Creating a Supplier Invoice**. When the wizard finishes, DynaSCAPE Manage will have pre-loaded the items in the new supplier invoice with the items from the template.
Printing Supplier Invoices

To print a supplier invoice, click the **Reports** task on the supplier invoice screen. A new window appears displaying the report types available including custom reports.

Select the desired report and click on the **Preview** button to view the report preview screen (Note: clicking on **Print** will send the report to the printer directly.)

If you are satisfied with the contents of the report as shown in the preview, the report can be printed, emailed or saved from the preview screen:
Archiving Single Supplier Invoices

To archive a single supplier invoice, open the supplier invoice screen for the supplier invoice you wish to archive.

Click the **Archived** checkbox in the bottom left hand corner of the supplier invoice screen:

A message box appears prompting you to confirm your decision to archive the supplier invoice. Click **Yes**:

When you **Save & Close** the supplier invoice, it will no longer appear on the DynaSCAPE Manage main screen unless you specifically request to display archived information.
Archiving Multiple Supplier Invoices

To archive multiple supplier invoices at once, start from the Supplier Invoices section of the DynaSCAPE Manage main screen and follow these steps:

1. Hold [Shift] or [Ctrl] while clicking invoices to select multiple supplier invoices. Right-click any of the selected supplier invoices then click the Archive menu option.

2. The Add to Archive wizard appears. Make sure the option to Archive all selected is selected, then click the Archive button.
All selected supplier invoices will be archived. Archived supplier invoices will no longer appear on the DynaSCAPE Manage main screen unless you specifically request to view archived data.

**Changing Invoice Status for Multiple Supplier Invoices**

To change the supplier invoice status for a group of invoices (i.e. to flag a group of supplier invoices as ‘Paid’), start from the **Supplier Invoices** section of the DynaSCAPE Manage main screen.

1. Hold down [Ctrl] or [Shift] while clicking invoices to select multiple supplier invoices. Right-click any of the selected supplier invoices, then click the menu option to **Edit Status**
2. The **Edit Status Wizard** appears. Use the drop-down box to select the supplier invoice status you wish to apply to all selected supplier invoices. Make sure the option to **Affect all selected** is selected:

![Edit Status Wizard](image)

3. Click **Apply Status**.

The supplier invoice statuses for all selected supplier invoices are updated to the specified new supplier invoice status.
Deleting Supplier Invoices

To minimize the risk of accidental deletions, supplier invoices must be deleted individually. To delete a supplier invoice, simply open the supplier invoice screen for the supplier invoice you wish to delete.

Click the Delete button:

Once the delete button is clicked a message appears requesting that you confirm your delete request. Click OK to delete the selected supplier invoice.
Supplier Invoice Configuration

To access the Supplier Invoice Configuration screen, select the Configuration | Supplier Invoice Configuration option from the main menu:

The Supplier Invoice Configuration options centre around Purchase Order (PO) Numbers. You can use DynaSCAPE Manage to automatically generate PO numbers for you when creating a supplier invoice, or create one manually. To have DynaSCAPE Manage assign PO Numbers automatically, select the option entitled Always auto-create a PO Number. If you wish to choose whether or not to create a PO Number, select the option entitled Let me choose whether to auto-create a PO Number.
If the first option is selected, each time you create a new Supplier Invoice, DynaSCAPE Manage will automatically assign a PO Number. To do this, DynaSCAPE Manage will use the number specified in the box entitled **Next PO Number to be issued**, and then increment that number by one for the next PO Number. Further, if you wish to have DynaSCAPE Manage automatically add a prefix to any PO Number created, simply check the box entitled **I wish to add a prefix to my PO numbers**, and enter the prefix you wish to use.

If you have chosen the option to choose whether or not to auto-create a PO number, DynaSCAPE Manage will only assign a PO Number if you click the **Auto** button next to the PO Number box on the **New Supplier Invoice Wizard**. DynaSCAPE Manage will then read the next PO Number and apply a prefix if that option is selected, and apply that to the Supplier Invoice you are creating.
Customer Invoicing

In this chapter you will learn to:

✓ Understand the Customer Invoice screen
✓ Use the three different customer invoice types (single line, summary, detail)
✓ Create fixed and time and materials invoices
✓ Manually add contract items, contract visits
✓ Print, post and archive invoices
✓ Change the invoice status for multiple invoices
✓ Delete invoices
✓ Configure invoices
Introduction to Customer Invoices

Invoicing is the final stage of the DynaSCAPE Manage process flow. It represents payment for services rendered and is the ultimate adjudicator of jobcosting success or failure.

DynaSCAPE Manage is not designed to be an accounting program. Invoice creation is the final stage of a contract's life. Payments are not processed or recorded, accounts receivables are not monitored and overdue accounts are not flagged. All invoice payment and monitoring must be done through an appropriate accounting package. DynaSCAPE Manage does export directly to the Quickbooks suite of accounting software (all Canadian and US editions, except for Quickbooks Basic). For more information on synchronizing DynaSCAPE Manage with Quickbooks, see the Linking With Quickbooks chapter.

To view your list of customer invoices on the DynaSCAPE Manage main menu, click the Customer Invoices link on the shortcut bar or the Invoices icon on the Main page.

Double-clicking any of the invoices listed on the DynaSCAPE Manage main screen will open the Invoice screen. Before we explain any invoicing tasks, let's examine the components of the invoice screen.
Invoice Screen—General Tab

The general tab of the invoice screen contains all invoice information, except for invoice notes. All dates, statuses, names and invoice line information is located on the general tab.

**TABLE 1. Field List - Invoice Screen - General**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Ref #</td>
<td>Reference number of the contract. Read Only.</td>
</tr>
<tr>
<td>Contract</td>
<td>Name of the contract being invoiced. Read only.</td>
</tr>
<tr>
<td>Customer</td>
<td>Name of the customer being invoiced. Read only.</td>
</tr>
<tr>
<td>Contact</td>
<td>From the drop-down list, select the name of a customer or jobsite contact that acts as an invoicing contact.</td>
</tr>
<tr>
<td>Invoice Number</td>
<td>The invoice number for the selected invoice [max 20 characters]. DynaSCAPE Manage can automatically increment numerical invoice numbers for you. See the section in this chapter entitled Configuring Invoices to set the start of the sequential numbering process.</td>
</tr>
<tr>
<td>Invoice Date</td>
<td>From the calendar, select the date the invoice was created.</td>
</tr>
</tbody>
</table>
TABLE 1. Field List - Invoice Screen - General

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO Number</td>
<td>Records the PO number for the selected invoice (when necessary) [max 20 characters].</td>
</tr>
<tr>
<td>Terms</td>
<td>From the drop-down list, select the payment terms for the selected invoice. If the desired payment terms does not appear in the drop-down list, you can add your own custom payment terms using Control Codes. See the chapter entitled: Configuring DynaSCAPE Manage for more information.</td>
</tr>
<tr>
<td>Print Date</td>
<td>From the calendar, select the date on which the invoice was printed (where necessary).</td>
</tr>
<tr>
<td>Status</td>
<td>From the drop-down list, select the invoice status for the selected invoice.</td>
</tr>
<tr>
<td>Invoice Paid</td>
<td>When checked, marks the invoice as paid.</td>
</tr>
<tr>
<td>Accounting Status</td>
<td>Indicates whether the invoice has been posted to QuickBooks.</td>
</tr>
<tr>
<td>Archived</td>
<td>When checked, marks the invoice as archived</td>
</tr>
</tbody>
</table>

The following is a description of each column found in the invoice items grid.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quantity</td>
<td>Enter a quantity for the invoice line item.</td>
</tr>
<tr>
<td>Units</td>
<td>From the drop-down list, select the units of measurement for the invoice line item.</td>
</tr>
<tr>
<td>Profit Center</td>
<td>From the drop-down list, select the profit center to which the revenue from the invoice line item will be allocated.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description for the selected invoice line item [max 1000 characters].</td>
</tr>
<tr>
<td>Size/Desc</td>
<td>Enter a further description for the selected invoice item (where necessary) [max 50 characters].</td>
</tr>
<tr>
<td>Amount</td>
<td>Enter the unit price for the selected invoice line item.</td>
</tr>
<tr>
<td>Discount - %</td>
<td>Enter the discount percentage for the selected invoice line item.</td>
</tr>
</tbody>
</table>
TABLE 1. Field List - Invoice Screen - General

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discounted Amt</td>
<td>The result of quantity multiplied by the unit price, subtracted by the discount (where applicable). Read only.</td>
</tr>
<tr>
<td>Tax</td>
<td>From the drop-down list, select the tax that applies to the selected invoice line item.</td>
</tr>
</tbody>
</table>

Invoice Screen—Notes Tab

The notes of the invoice screen is designed for the user to enter any descriptions or stipulations regarding the invoice. The invoice notes can be included on any printed invoice report (maximum 4000 characters).

Types of Customer Invoices

Invoices can be completely custom created and can represent almost any style of invoices. For automatically created invoices however, there are three types of invoices that DynaSCAPE Manage can automatically create.

**Single line** - The entire invoiced amount is entered into a single line on the invoice. If the taxes are the same for each item in the Contract, then the Invoice will display that tax, otherwise it will be set to the Customer default.

**Summary** - The invoice is broken up according to the number of profit centers on the contract (i.e. each profit center represents a different line of the invoice). Once created, the user can enter a meaningful description for each line. If the taxes are the same for each item in the Contract, then the Invoice will display that tax, otherwise it will be set to the Customer default.

**Detailed** - Every contract item is invoiced individually. Each contract item is given its own invoice line and amount on the invoice. Each item is shown with the tax from the Contract.
Creating Customer Invoices

There are two methods of creating invoices:

**Single invoices:** Invoices are created on a contract-by-contract basis.

**Invoice Runs:** Invoices are automatically created for an entire division.

Creating invoice runs is explained in a subsequent chapter, **Invoice Runs**. This chapter will introduce creating single invoices and will explain each component and task found on the invoice screen. Once mastered, the tasks and components explained in this chapter will be of assistance when modifying invoices created with an invoice run.

Creating a Single Invoice (Construction-type contract)

Construction-type contract invoices differ from maintenance-type contract invoices because construction-type contracts do not automatically support fixed billing. To create a single invoice for a construction-type contract, start from the contract screen.

1. Open the contract for which you wish to create an invoice, then click the task entitled **Create an invoice**.

![Invoice Screen Screenshot](image)
2. The **Invoice Wizard** appears. Use the calendar and drop-down box to specify an invoice date and payment terms. Where necessary, enter a PO Number in the PO Number box. Click **Next** when complete.

3. From the available options, select the type of invoice you wish to create. Remember the differences between the various invoice types:

**TABLE 2. Invoice Types**

<table>
<thead>
<tr>
<th>Invoice Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single line</td>
<td>Creates an invoice with a single line item representing the entire amount of the invoice.</td>
</tr>
<tr>
<td>Summary</td>
<td>Creates an invoice with a line item representing each unique profit center on the contract.</td>
</tr>
<tr>
<td>Detailed</td>
<td>Creates an invoice with a distinct line item for each and every contract item on the invoice.</td>
</tr>
</tbody>
</table>
4. If you elected to create a single line invoice, enter the description for the invoice line item in the space provided. If you elected to create a summary invoice (as pictured in this example) select the profit centers you wish to include on the invoice. Any profit centers listed in the box on the right hand side will be included on the invoice. You can elect not to include specific profit centers by dragging and dropping them to the box on the left hand side.

5. Click Next. Click Finish to create the invoice.

Upon clicking Finish, the invoice will automatically be created for you. DynaSCAPE Manage will use the prices specified on the contract to create an invoice based on the
Customer Invoicing

options you selected. Once the invoice has been created, you can adjust any descriptions, quantities, discounts, or prices as necessary.

Creating a Single Invoice (Maintenance-type contract)

Maintenance-type contracts have extra functionality over its construction-type counterparts. Fixed term billing and time and materials billing are unique to maintenance-type contracts.

To create an invoice for a specific maintenance contract, open the contract screen for the selected contract. The Contract this contract Information dictates the type of invoices that can be created. If the Invoice this contract manually option is selected, invoices and their amounts are customized for each individual invoice. If the Invoice this
contact at a fixed rate of ______ per period option is selected, DynaSCAPE Manage can automatically and repeatedly generate an invoice for a pre-defined amount.

To invoice a maintenance contract without entering a pre-determined fixed rate, and without any automatic time and materials billing, simply select the option to Invoice this contract manually.

To invoice a maintenance contract strictly using time and materials billing and without using a monthly fixed rate, select the option to Invoice this contract manually, and make sure all contract items to be billed are flagged as Bill Per Visit contract items.

1. To generate an invoice, click the task Create an invoice. The New Invoice Wizard appears. Besides selecting the invoice date, the terms, and entering
a P.O. number (where applicable), there are two important options which can be included.

![New Invoice Wizard](image)

**TABLE 3. New Invoice Wizard Options - Maintenance-type Contracts**

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Description</th>
</tr>
</thead>
</table>
| Invoice for fixed amount                        | When selected, DynaSCAPE Manage will automatically add an invoice line for the amount specified in the contract payment information section.  

_This option is available only for contracts that have the Invoice this contract at a rate of _____ per period option (found in the contract payment information section of the contract screen) selected._  

| Invoice for time and materials (timesheet visits) | When selected, DynaSCAPE Manage will scan all timesheets for the specified contract and bill for each instance that a Bill Per Visit contract item (not previously billed for) was performed.  

_This option is available only for contracts which have contract items identified as Bill Per Visit items._

2. Click Next.
3. Select the type of invoice you wish to create. Single-line invoices are most common for maintenance-type contracts.

![Invoice Wizard](image)

4. Click Next.

5. Depending on the option selected, you will either be prompted to enter an invoice line description (for single line invoices) or to select the profit centers to be included on the invoice (summary invoices). Depicted in the example below is the single-line invoice screen.

![Invoice Wizard](image)

6. Click Next.
7. If you have elected to invoice for time and materials a final options screen will appear, prompting you for a few more configuration settings. Leaving the **Summarize visit and material billing** unchecked will cause DynaSCAPE Manage to add each ‘visit’ for bill per visit contract items to the invoice as a separate line item. Each and every visit will be itemized, priced, and dated individually. If you select the option to **Summarize visit and material billing**, all visit information for like contract items will be summarized in one invoice line item (i.e. 3 visits on 3 different days at 2 hours each visit will result in a single invoice line item of 6 hours). Use the **Invoice time and materials up to** calendar to select the last applicable billing date for visits. DynaSCAPE Manage will scan all timesheets up to and including the selected date for uninvoiced ‘bill per visit’ contract items.

![New Invoice Wizard](image)

8. Click Next. Click Finish to generate the invoice.

During the next few seconds, DynaSCAPE Manage will automatically generate the requested invoice information, then will open the invoice on your screen. The
The screenshot below demonstrates an invoice with both fixed and time and materials billing included on the invoice.

In the screenshot depicted above, you can see the results of the invoice created in our example. The first invoice line item (highlighted) is for the monthly fixed rate, $350.

The next invoice line was automatically included using timesheet information. The **Weeding of beds** contract items was flagged as a bill per visit contract item. DynaSCAPE Manage used timesheet information to automatically determine that two visits of this contract item had been performed up to May 31, 2005. Each visit was itemized on the invoice. To confirm that the visits were billed for, you can open a timesheet that included either of the above timesheets and you will note that the **Billed** column of the timesheet is checked.
Editing Customer Invoices

Once created, all invoices are fully customizable. You can adjust quantities, prices, discounts, even add or delete invoice items from the list. Only once an invoice is posted to accounting are the numbers and items locked down.

Just as on the screens previously discussed in this manual, editing invoice items is simply a matter of clicking on the information you wish to edit, then re-entering the information. Take, for instance, adjusting the price of a given invoice line item. Simply click the price you wish to edit, enter the new price, press [Enter]. Click Save when all the changes are complete.

Adding Invoice Line Items

There are three different ways to add a line item to an invoice:
1. Manually adding a new line
2. Adding a contract item
3. Adding a timesheet visit (time or materials)

To manually add a new line to the invoice, double-click the invoice row marked with an asterisk (*). A new line is added to the invoice. Enter the information for the new invoice line item or press [Esc] to cancel the action.
To add an item from the contract directly to the invoice, click the task entitled **Add contract items to this invoice**. A contract item window appears on the right hand side of the screen displaying all goods and services on the contract. Drag and drop any contract items from the contract item window into the invoice item grid to add the contract item to the invoice.

To add a invoice item based on a timesheet visit (time or materials), click the task entitled **Add a visit to this invoice**. A window appears on the right hand side of the invoice screen listing all uninvoiced timesheet labor or material allocations. By dragging and dropping any of these timesheet entries into the invoice items grid, DynaSCAPE Manage will automatically generate a new invoice line item. You can
make any custom changes to the pricing, quantities, or discount once the line has been added.

Deleting Invoice Line Items

To delete a line from the invoice, right-click the invoice line you wish to delete, then click the Remove item from invoice menu option.
The selected invoice line item will be deleted permanently. Exiting the invoice screen without saving your changes will not bring back the deleted invoice item. A message box appears prompting you to confirm your delete request. Click **OK** to permanently delete the selected invoice item.
Printing Customer Invoices

Printing Single Invoices

The information on the invoice screen is not necessarily the information you must display to your customers. **Profit Center**, for example, is included on the invoice screen to enable you to allocate your revenues appropriately. The customer does not necessarily need profit center information on their invoice.

The DynaSCAPE Manage invoice report represents a very traditional invoice layout. You have complete freedom however to create your own invoice printout using the **DynaSCAPE Manage Report Designer**. Although not covered in this manual, the tools found on the report designer will enable you to choose exactly how you would like your invoice laid out.

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**Did You Know**

*DynaSCAPE Software has a custom reporting service available to you.* Quite often, the demands for our customers’ reports are beyond the scope of their familiarity with the DynaSCAPE Manage report designer. To find out if we can help you with a report, contact our sales department by phone or at sales@dynascape.com. Provide us with a sample of what you need and we can give you a no-obligation quote of the cost of designing the report.
To print an invoice, click the **Print/Email Invoice** task on the invoice screen. A new window appears displaying your various report options including custom invoices.

Select a report and click **Preview** to open the report preview screen (clicking **Print** will send the report directly to the printer). If you are satisfied with the contents of the report, print, email or save the report from the preview screen.
Printing Multiple Invoices

Using the functionality on the DynaSCAPE Manage reporting screen, you can use criteria to specify multiple invoices to print at once. For more information on using the DynaSCAPE Manage reporting screen, see the Reporting chapter in this manual.
Posting Customer Invoices

Currently DynaSCAPE Manage invoices only post to Quickbooks (Canadian and US versions, except Quickbooks Basic).

Before posting any invoices to Quickbooks, you must complete the Quickbooks Setup and Quickbooks Synchronization processes (found under the **Accounting** menu on the DynaSCAPE Manage main screen). By setting up and synching your information, DynaSCAPE Manage and Quickbooks will be able to effectively communicate customer, jobsite, tax, and revenue account information. For more information on configuring your DynaSCAPE Manage-Quickbooks setup, consult the **Linking With Quickbooks** chapter.

Information about posting multiple invoices at once can also be found in the **Linking With Quickbooks** chapter. To post a single invoice to Quickbooks, simply click the **Post invoice to accounting** task. **Note:** The **Post invoice to accounting** task will only appear after you have completed the Quickbooks setup and synchronization processes.

A progress bar will indicate the status of the posting, and an error log will be generated if there are any issues encountered during the posting process.
Archiving Customer Invoices

By archiving invoices, you can hide outdated invoice information from day-to-day viewing without losing the information. Archived invoices will simply disappear until you specifically request to show archived invoice information.

Archiving Single Invoices

To archive a single invoice, open the invoice screen for the invoice you wish to archive. Click the Archived checkbox in the bottom left hand corner of the invoice screen.

A message box appears prompting you to confirm your decision to archive the invoice. Click Yes.
When you **Save & Close** the invoice, it will no longer appear on the DynaSCAPE Manage main screen unless you specifically request to display archived information.

### Archiving Multiple Invoices

To archive multiple invoices at once, start from the Customer Invoice section of the DynaSCAPE Manage main screen and follow these steps:

1. Hold [Shift] or [Ctrl] while clicking invoices to select multiple invoices. Right-click any of the selected invoices then click the **Archive** menu option.
2. The Add to Archive wizard appears. Make sure the option to **Archive all selected customer invoices** is selected, then click the Archive button.

The Add to Archive wizard appears. Make sure the option to Archive all selected customer invoices is selected, then click the Archive button.

All selected customer invoices will be archived. Archived invoices will no longer appear on the DynaSCAPE Manage main screen unless you specifically request to view archived data.
Changing Invoice Status for Multiple Invoices

To change the invoice status for a group of invoices (i.e. to flag a group of invoices as ‘Approved’), start from the Customer Invoices section of the DynaSCAPE Manage main screen.

1. Hold down [Ctrl] or [Shift] while clicking invoices to select multiple invoices. Right-click any of the selected invoices, then click the menu option to **Edit Status**.

2. The **Edit Status Wizard** appears. Check the options that you wish to update. Use the drop-down box to select the invoice status you wish to
apply to all selected invoices. Make sure the option to **Affect all selected invoices** is selected.

3. Click **Apply Changes**. The changes have been propagated to all the selected invoices.
Deleting Customer Invoices

To minimize the risk of accidental deletions, invoices must be deleted individually, except when part of an invoice run. Only through invoice runs can multiple invoices be deleted at once. For information on deleting invoice runs, consult the Invoice Runs chapter of this manual.

To delete an invoice, simply open the invoice screen for the invoice you wish to delete. Click the Delete button.

Once the delete button is clicked a message appears requesting that you confirm your delete request. Click OK to delete the selected invoice.
Customer Invoice Configuration

Invoice configuration options are found in the Configuration | Customer Invoice Configuration menu item.

The Next invoice number will set the number of the next customer invoice that DynaSCAPE will produce.

The Next batch number is related to the next batch of the Invoice Runs.

Select the Default Terms from the dropdown.

Click Save & Close when complete.
Customer Invoice Runs

In this chapter you will learn to:

- Understand the customer invoice run screen
- Generate an invoice run for construction-type contracts
- Generate an invoice run for maintenance-type contracts
- Edit individual invoices in a run
- Add individual invoices to a run
- Print an invoice run
- Post an invoice run
- Edit invoice statuses for an invoice run
- Delete an invoice run

On the 15th and last days of each month, Tracy does her invoicing. For all her customers who receive monthly all-inclusive billing rates, their invoices are generated on the last day of each month. For all of Tracy’s time and materials customers, their invoices are generated on the 15th of each month, retroactive to services received in the month prior.

Previous to DynaSCAPE Manage, Tracy had to wade through piles of timesheets and material allocation sheets to determine which services were provided and when. Tracy was endlessly creating and checking spreadsheets to determine that each customer was being fairly billed for services received. Invoicing was a lengthy, inefficient process.

DynaSCAPE Manage invoice runs have eliminated the mindless routing through timesheets. DynaSCAPE Manage automatically generates invoices for all ‘active’ contracts. DynaSCAPE Manage can even automatically generate time and materials billing invoices by using its own timesheets to track when visits occurred. A job that used to take Tracy days to complete and refine has been reduced to an hour or so of her time.
Customer Invoice Runs - Introduction

Invoice runs are accessed via the DynaSCAPE Manage main screen from the View | Invoice runs menu.

If you have already created an invoice run, a list of previously created invoice runs appear on your screen. If this is your first look at the invoice runs section, the grid portion of your screen is blank.

Although they can be used for construction-type invoices, invoice runs are primarily designed for maintenance-type (recurring) contracts. Invoice runs are designed to automatically generate invoices for a list of ‘active’ contracts. Enormous time savings can be achieved by allowing DynaSCAPE Manage to automatically generate runs of invoices. Once generated, an appropriate staff member needs only to review the run to ensure completeness and accuracy.
Once created, a typical invoice run screen looks like this: (the number of invoices will vary)

The name and number of the invoice run are displayed at the top of the screen.

Invoices are grouped and listed by customer, then by invoice. Each invoice has its customer, jobsite, invoice number, invoice date, totals, and posted status displayed. The final two columns, Post and Print are used for selecting multiple invoices for posting or printing functions.
Generating a Construction-type Invoice Run

Invoice runs were designed to aid with the end-of-month invoicing, where numerous contracts are invoiced at once. The practice of end-of-month invoicing is most applicable for maintenance-type contract invoicing, but for companies who also bill their construction contracts with monthly plans, generating invoice runs can be useful.

To generate an invoice run, start from Invoice Run section of the DynaSCAPE Manage main screen (View | Invoice Runs).

1. Click the Create monthly run task.

2. The Invoice Run Wizard screen appears. From the division list, select the division for which you want to create an invoice run. In the following
example, we’ll simulate the process of doing end of month invoicing for the Landscape Division.

The following table describes all the fields available on the invoice run wizard for construction-type invoicing (Note: maintenance-type invoice runs are further explained, explained in the next section - Generating a Maintenance-type Invoice Runs).

TABLE 1. Field List - Invoice Run Wizard (Construction-type only)

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select the division...</td>
<td>Select the division for which the invoice run wizard will collect contract information and generate invoices. DynaSCAPE Manage will only create division-specific invoice runs.</td>
</tr>
<tr>
<td>Invoice Run Number</td>
<td>A unique number used only for identifying the invoice run numerically.</td>
</tr>
<tr>
<td>Invoice Run Description</td>
<td>A text description describing the invoice run (i.e. Grounds Maintenance - End of Month Invoicing - Sept. 2006). Mandatory field.</td>
</tr>
<tr>
<td>Invoice Date</td>
<td>The invoice date for all invoices generated by the invoice run.</td>
</tr>
<tr>
<td>Default Terms</td>
<td>The payment terms assigned to all invoices generated by the invoice run. Once generated, you can edit the payment terms for any specific invoices as necessary.</td>
</tr>
<tr>
<td>Default Invoice Description</td>
<td>Used for single line invoicing, this box allows you to enter a description that will be utilized on all single line invoices.</td>
</tr>
</tbody>
</table>
3. Enter the appropriate information for the invoice run and click **Next**.

4. The next screen of the invoice run wizard displays all potential contracts to be invoiced. Each contract is listed alphabetically (by customer name), with each column giving descriptive information about the contract and invoice information.

![Invoice Run Wizard](image)

**TABLE 2. Invoice Run - Invoicing Options**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>The name of the customer.</td>
</tr>
<tr>
<td>Jobsite/Contract</td>
<td>The name of the jobsite and the contract's description.</td>
</tr>
<tr>
<td>Invoice?</td>
<td>A checkbox indicating whether the contract is to be included in the invoice run. A checked box means the contract will be included in the invoice run.</td>
</tr>
</tbody>
</table>
| Invoice Type    | The type of invoice to be created. Construction-type contracts can be invoiced 2 different ways:  
  **Auto**: any uninvoiced revenues for the contract will be automatically included on the invoice.  
  **Fixed**: the contract is invoiced for a fixed amount, as specified in the **Fixed Price** column |

**Fixed Price**

<table>
<thead>
<tr>
<th>Jobsite/Contract</th>
<th>Invoice?</th>
<th>Invoice Type</th>
<th>Fixed Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Villa, Soria</td>
<td></td>
<td>Construction</td>
<td>$0.00</td>
</tr>
<tr>
<td>Villa Residence</td>
<td></td>
<td>Construction</td>
<td>$10,000</td>
</tr>
</tbody>
</table>
Adjust any invoice settings as necessary and click **Next** when ready to generate the invoices. Click **Finish**.

Upon clicking **Finish**, the invoice run wizard closes and a completed invoice run appears.

### TABLE 2. Invoice Run - Invoicing Options

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Detail</td>
<td>Select between Single Line, Summary, or Detail options. Each invoicing option is described fully in the Invoices chapter in this manual. If either Single Line or Summary is chosen a dollar value must be entered into the Fixed Price column in order for the Invoice Run to create the necessary invoices.</td>
</tr>
<tr>
<td>Fixed Price</td>
<td>For fixed invoices, the fixed amount to be included on the invoice to be created.</td>
</tr>
</tbody>
</table>
Generating a Maintenance-type Invoice Run

Maintenance-type contract invoice runs are much more common than their construction-type counterparts. DynaSCAPE Manage invoice runs can perform automatic fixed monthly billing, time and materials billing or a combination of both.

To generate a maintenance-type invoice run, start from Invoice Run section of the DynaSCAPE Manage main screen (View | Invoice Runs).

1. Click the Create monthly run task.

2. The Invoice Run Wizard screen appears.
3. From the division list, select the division for which you want to create an invoice run. In the following example, we’ll simulate the process of doing end of month invoicing for a Grounds Maintenance division.

The following table describes all the fields available on the invoice run wizard for maintenance-type invoicing.

**TABLE 3. Field List - Invoice Run Wizard (Maintenance-type)**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select the division...</strong></td>
<td>Select the division for which the invoice run wizard will collect contract information and generate invoices. DynaSCAPE Manage will only create division-specific invoice runs.</td>
</tr>
<tr>
<td><strong>Invoice Run Number</strong></td>
<td>A unique number used only for identifying the invoice run numerically.</td>
</tr>
<tr>
<td><strong>Invoice Run Description</strong></td>
<td>A textural description describing the invoice run (i.e. Grounds Maintenance - End of Month Invoicing - Sept. 2005. Mandatory field.)</td>
</tr>
<tr>
<td><strong>Invoice Date</strong></td>
<td>The invoice date for all invoices generated by the invoice run.</td>
</tr>
<tr>
<td><strong>Default Terms</strong></td>
<td>The payment terms assigned to all invoices generated by the invoice run. Once generated, you can edit the payment terms for any specific invoices as necessary.</td>
</tr>
<tr>
<td><strong>Default Invoice Description</strong></td>
<td>Used for single line invoicing, this box allows you to enter a description that will be utilized on all single line invoices.</td>
</tr>
</tbody>
</table>
Enter the appropriate information for the invoice run and click Next.

The next screen of the invoice run wizard displays all potential contracts to be invoiced. Each contract is listed alphabetically (by customer name), with each column giving descriptive information about the contract and invoice information.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include fixed billing rate charges on invoice</td>
<td>Instructs DynaSCAPE Manage to include any fixed contract amounts as specified in the Contract Payment Information section of each contract.</td>
</tr>
<tr>
<td>Only generate fixed invoices</td>
<td>Instructs DynaSCAPE Manage to only bill fixed invoice amounts and not to include time and materials contracts.</td>
</tr>
<tr>
<td>Include time and material billing for visits up to</td>
<td>Specifies the date up to which timesheet visits should be considered for automatic time and materials billing.</td>
</tr>
<tr>
<td>Summarize time and material billing information</td>
<td>Condenses lists of like timesheet visits into a single invoice row -- the amount of which represents the total owing for all visits during the selected period.</td>
</tr>
</tbody>
</table>

TABLE 4. Invoice Run - Invoicing Options

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>The name of the customer.</td>
</tr>
<tr>
<td>Jobsite/Contract</td>
<td>The name of the jobsite and the contract's description.</td>
</tr>
<tr>
<td>Invoice?</td>
<td>A checkbox indicating whether the contract is to be included in the invoice run. A checked box means the contract will be included in the invoice run.</td>
</tr>
<tr>
<td>Invoice Type</td>
<td>The type of invoice to be created. Construction-type contracts can be invoiced 2 different ways:</td>
</tr>
<tr>
<td></td>
<td>Auto: any uninvoiced revenues for the contract will be automatically included on the invoice.</td>
</tr>
<tr>
<td></td>
<td>Fixed: the contract is invoiced for a fixed amount, as specified in the Fixed Price column.</td>
</tr>
</tbody>
</table>
6. Adjust any invoice settings as necessary and click Next when ready to generate the invoices. Click Finish.

Upon clicking Finish, the invoice run wizard closes and a completed invoice run appears.

**TABLE 4. Invoice Run - Invoicing Options**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Detail</td>
<td>Select between Single Line, Summary, or Detail options. Each invoicing option is described fully in the Invoices chapter in this manual. If either Single Line or Summary is chosen a dollar value must be entered into the Fixed Price column in order for the Invoice Run to create the necessary invoices.</td>
</tr>
<tr>
<td>Fixed Price</td>
<td>For fixed invoices, the fixed amount to be included on the invoice to be created.</td>
</tr>
</tbody>
</table>
Editing Invoice Runs

Once an invoice run has been created, you have the full capability of editing, adding, or deleting invoices in the run.

Editing an Invoice in an Invoice Run

To edit an invoice in an invoice run, simply double-click the name of the invoice on the invoice run screen.

The invoice opens using the invoice screen. Once the invoice screen is opened you can adjust invoice items, prices, dates, or any information that you need.
Adding an Invoice to an Invoice Run

1. From the Invoice Run screen of the desired invoice run, click the Add existing invoice(s) to this run task.

2. The Add Invoices tool window appears on the right side of the screen. Drag and drop the selected invoice into the invoice run grid.
3. The selected invoice now appears in the invoice run grid. Click **Save**.

**Removing an Invoice from an Invoicing Run**

**Important:**

Removing invoices from a run does **not** delete the invoice from DynaSCAPE Manage. Removing an invoice from an invoice run removes the invoice from the invoice run, but leaves the invoice as is in the Customer Invoices section of your DynaSCAPE Manage database.

To remove an invoice from an invoice run, start from the invoice run screen. Right-click the name of the invoice you wish to remove, then click the menu option to **Remove invoice from invoicing run**.

A message box appears prompting you to confirm your decision to remove the selected invoice from the invoice run. Click **OK** to remove the selected invoice.
Deleting an Invoice from an Invoice Run

Important

Deleting an invoice from an invoice run will permanently delete the selected invoice from your DynaSCAPE Manage database.

To delete invoices (in an invoice run) permanently from your database, right-click the invoice on the invoice run screen, then select the menu option to Delete invoice.

A message box appears on your screen prompting you to confirm your decision to permanently delete the selected invoice. Click OK to delete the invoice.
Printing an Invoice Run

To print all the invoices in a run, start from the invoice run screen and follow these steps:

Mark the invoices you wish to print by placing a checkmark in the Print column (to print the entire invoice run, right-click any invoice and select the menu option to Select all invoices for printing).

When the invoices you wish to print have been selected, click the Print invoice(s) task on the invoice run screen. Select the style of invoice report you wish to use in the
window that appears. Click **Preview** to view all the invoices in the Report Preview window.

The invoices may take several seconds to generate (depending on the number in the run). Once generated, the invoices appear in a print preview screen, allowing you to preview the output before sending the invoices to printer. Click the **Print** button on the print preview screen to send the invoices to printer.
Posting an Invoice Run

To post an invoice run, start from the invoice run screen. This can only be done after QuickBooks setup has been run.

1. Mark the invoices you wish to post by placing a checkmark in the Post column or, to select all invoices for posting, right-click any invoice and select the menu option to Select all invoices for posting.

Did You Know...

By opening Quickbooks to your company file before posting, synchronizing, or importing from DynaSCAPE Manage, you can greatly improve the speed of DynaSCAPE Manage-Quickbooks communication.
2. Once all the necessary invoices have been selected for posting, click the Post all invoices selected for posting task.

3. DynaSCAPE Manage and Quickbooks attempt to establish a connection.

4. Once a Quickbooks connection is successful, DynaSCAPE Manage begins posting invoices to Quickbooks. Depending on the number of invoices and the location and status of your Quickbooks company file, posting invoices may take anywhere from a few seconds to several minutes.
5. When the posting is completed, DynaSCAPE Manage will mark all invoices that were successfully posted using a checkmark in the **Posted** column. Any unsuccessful posting will not be marked as posted.

---

**Did You Know...**

Results from unsuccessful postings are written to a log file on your local machine. To find out why a posting may have failed, go to the DynaSCAPE Manage installation directory (typically `C:\Program Files\DynaSCAPE` (or Garden Graphics)\DynaSCAPE Manage (or IRIS) and open the **Accounting** folder. Within the Accounting folder are text files which act as error logs for your most recent accounting operations. For example, to learn why invoice posting errors occurred, consult the `QBInvoicePostingLog.txt` file.
Changing Invoice Statuses for an Invoice Run

To change the invoice statuses for all the invoices in an invoice run, click the Change status task on the invoice run screen.

From the pop-up menu that appears, select the new invoice status to which you wish to change all invoices in the invoice run.

Upon clicking the new invoice status, a message box appears prompting you to confirm your request to change the invoice statuses. Click OK.

The invoice statuses for all invoices in the run are updated to the selected status.
Deleting Invoice Runs

To delete an invoice run (including all invoices within the run), start from the invoice run screen. Click the **Delete All** button to delete the entire invoice run.

A message box appears prompting you to confirm your decision to delete the selected invoice run. Click **OK** to delete the run.

The invoice run and all contained invoices are permanently deleted from your DynaSCAPE Manage database.
In this chapter you will learn to:

- Generate reports for more than individual entities
- Apply criteria to reports such as by date or by status

At the beginning of each week, Bill likes to monitor the status of all outstanding quotes. Using the functionality in the DynaSCAPE Quote/Manage reporting section, Bill can generate a report of all current quotes divided by their statuses. Each week Bill uses his quote status report to get an instantaneous picture of the quantity and value of all outstanding quotes.

DynaSCAPE Quote/Manage reporting offers you the ability to generate company-wide reports based on a number of individual or combined criteria. The reporting section is dedicated to enabling you to produce reports for multiple, instead of single entities. For example, reports on the timesheet screen print information specific to the selected timesheet. To print information relating to timesheets for the month of June, use functionality provided to you in the DynaSCAPE Quote/Manage reporting menu.
Introduction to the DynaSCAPE Manage Reporting Screen

The DynaSCAPE Quote/Manage reporting section gives you access to a host of reports which are not specific to a single entity, such as a timesheet, quote, or customer. Using the DynaSCAPE Quote/Manage reporting section, you can generate reports that encompass a range of entities, such as timesheets between certain dates, or residential-type customers.

To access the DynaSCAPE Manage reporting screen select the Reports | DynaSCAPE Reporting option from the menu bar or by clicking on the Reports icon on the Main page.
The DynaSCAPE Manage reporting screen appears on your screen.

The left side of the reporting screen lists all the reporting areas. To generate a list of all residential customers, for example, click the **Customer** folder to view all reports designed for customers.

The right side of the reporting screen contains information about the report, including criteria for the report’s execution.
Launching A Report

To launch any of the reports found on the DynaSCAPE Quote/Manage reporting screen, follow the instructions contained within this section.

**Important**
The criteria (filters) for each report type varies. The filters displayed in this example will not reflect the filters available for all reports. Each report group (customers, quotes - detail, etc.) has its own custom, specific set of report filters.

Open the folder for the report type you wish to run.
Click the name of the report you wish to run. The selected report's information will appear on the right hand side of the reporting screen.

Click the Launch Report tab at the top of the screen. All available report filters appear.

Select the report filters that you wish to use to generate your report. To select a report filter, place a checkmark beside the report filter name then, where necessary, enter or select the report filter from the corresponding text box or drop-down box. After
selecting all appropriate report filters, click the **Launch Report** button to display the Print Preview screen for the selected report.

Depending on the size and scope of the report, the Print Preview screen may take several seconds to generate.

The report can be **Printed**, **Emailed** or **Saved** from the preview.

To return to the DynaSCAPE Quote/Manage Reporting screen close the report preview screen.
10
Linking With QuickBooks

In this chapter you will learn to:

✓ Import customers and suppliers from QuickBooks
✓ Setup a DynaSCAPE Manage/QuickBooks link
✓ Synchronizing customer, supplier, and employee lists
✓ Post invoices
✓ Post timesheets

Max manages the books at a high-end residential landscape construction company. Each month Max manually enters all invoices into the accounting software, often duplicating work that could be done automatically by their estimation software.

Since installing DynaSCAPE Manage, Max has streamlined the entire invoicing process. Invoices themselves are generated automatically from contracts. Once the invoices are generated and printed using DynaSCAPE Manage, Max posts the invoices to his QuickBooks accounting software. QuickBooks controls the accounting rules for payment, collection, and reporting of invoices. With the ability to post invoices directly from DynaSCAPE Manage, Max drastically reduced the time he spends manually typing up invoices.

Max also uses timecards as the basis for their payroll information. DynaSCAPE Manage timesheets provide detailed tracking of all hours/costing information for the labor component of jobs. Now Max can take advantage of the detailed job costing information in DynaSCAPE Manage and, with the click of a button, automatically export the same information to QuickBooks for payroll and expenditure purposes.
DynaSCAPE Manage & QuickBooks

DynaSCAPE Manage does not perform typical accounting functionality. Tracking accounts receivable, payables, payments and deposits should still be done using your existing accounting system.

However, to make your office workflow more efficient, DynaSCAPE Manage has been developed to synchronize its information with your QuickBooks company file. Customer, supplier, employee and invoice information can be imported from QuickBooks to help you get your DynaSCAPE Manage database up and running after installation. Once you begin using DynaSCAPE Manage, DynaSCAPE Manage becomes the data-manager and exports its customer, supplier, and invoice information to QuickBooks. For more information about how the integration between DynaSCAPE Manage and QuickBooks works, read through this chapter.
Importing Customers and Supplier Information from QuickBooks into DynaSCAPE Manage

After installing DynaSCAPE Manage on your workstations, the startup wizard offers your first exposure to the DynaSCAPE Manage/QuickBooks integration. During the startup wizard, you have the option to import your Customer, Vendor and Employee lists from a QuickBooks company file. For complete instructions on this process, please refer to the DynaSCAPE Quote/Manage Startup chapter in the Quote manual.

If you ran the startup wizard without importing your QuickBooks data and wish to do so now, you can access the import functionality from the menu bar on the DynaSCAPE Manage main screen. However, at this point, you will only be able to import Customer and Vendor information. Employees will not be imported.

**Important**

*It is only intended that you import your QuickBooks customer and supplier information to get your DynaSCAPE Manage database started. Once your QuickBooks data has been imported all additions and changes to your customer data should be done using DynaSCAPE Manage. Each time you synchronize your data afterwards, DynaSCAPE Manage will change any necessary QuickBooks customer information and will automatically add any new customers to your QuickBooks company file.*

To import customer and supplier information from a QuickBooks company file into your DynaSCAPE Manage database, follow these instructions:

1. First, minimize your DynaSCAPE Manage application and open your QuickBooks company file using QuickBooks. If QuickBooks is not open to the company file, errors may be encountered during the Import procedure.

2. Once the QuickBooks company file is open, minimize QuickBooks and return to your DynaSCAPE Manage window. Start from the DynaSCAPE Manage main screen.
3. From the menu bar, select File | Import from QuickBooks

![Image of the menu bar with selected options]

4. The Import From QuickBooks wizard appears. Click the ... button to locate your QuickBooks company file, or use the Auto-Locate button.

![Image of the Import From QuickBooks wizard]

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10.4 DynaSCAPE Software
5. If you click on ... a Windows Explorer window appears prompting you to locate and select your QuickBooks company file. When you have selected your company file, click the Open button.

6. When the file has been located (either with the Auto-Locate or manually), the location of the company file will appear in the text box. Before starting the import, take note of the My QuickBooks billing addresses include the customer name checkbox. If the billing addresses in your QuickBooks company file have a company name and/or person name as their first line, make sure that this box is checked. If your QuickBooks billing addresses are strictly address information (no names), leave the box unchecked. This
setting is very important in determining the way customer/supplier data is imported.

7. Click Import.

8. If you have previously made a connection between DynaSCAPE Manage and QuickBooks, you may skip these next few steps and proceed to step 11. If you have never integrated your database with your QuickBooks company file, QuickBooks prompts you with a warning that DynaSCAPE Manage is attempting to access your company file. To grant DynaSCAPE Manage access to your company data file click the Yes, Always button. If
you wish to export Timesheets to QuickBooks, then you must check the ‘Allow this application to access Social Insurance Numbers...’.

9. QuickBooks will prompt you to confirm the decision to allow DynaSCAPE Manage access to your company file. Click Yes.

10. QuickBooks again confirms your decision to connect to your QuickBooks company file while displaying the selected parameters for connection. Click Done.
Important

Different versions of QuickBooks will have slight variations of the above screens but the concept remains the same: you need to explicitly allow DynaSCAPE Manage access to QuickBooks.

11. DynaSCAPE Manage then tests the QuickBooks connection and begins importing data. The progress bar along the bottom of the screen displays the progress of the import.

When the Import From QuickBooks wizard completes the task, it will automatically close itself. The QuickBooks Customers and Vendors will be imported into the DynaSCAPE Manage database.
Setting Up the DynaSCAPE Manage/QuickBooks Link

Before you post any invoices or timesheets to QuickBooks, there are four steps that you must complete:

1. Setup the DynaSCAPE Manage to QuickBooks link
2. Synchronize your customer list
3. Synchronize your supplier list
4. Synchronize your employee list

This section of the chapter will walk you through setting up the DynaSCAPE Manage to QuickBooks link. Before DynaSCAPE Manage can send any information to QuickBooks, you must complete the steps below.

1. On the menu bar, select Configuration | System Configuration.

2. When the System Configuration screen appears, click the Accounting Integration tab.

3. Click the Enable DynaSCAPE Manage accounting integration checkbox so that a checkmark is present (if not already selected). The QuickBooks
option is selected automatically. Click **Save & Close** to return to the DynaSCAPE Manage main screen.

4. Using the menu bar, select **Accounting | QuickBooks Setup**.

5. The **Setting Up QuickBooks** wizard appears on your screen. Using this wizard will setup all of the DynaSCAPE Manage to QuickBooks relationships necessary for establishing proper communication.

6. Minimize DynaSCAPE Manage and open your QuickBooks application with your company file loaded. Keeping QuickBooks open (but minimized) while working through the setup wizard will greatly improve the speed at which information is exchanged.

7. Once you have opened your company file in QuickBooks, minimize your QuickBooks application and return to the DynaSCAPE Manage **Setting Up QuickBooks** wizard.
8. Use the drop-down list to select your current version of QuickBooks.

9. Next you must identify your QuickBooks company file. You can either type the full path and file name of the QuickBooks company file or, if you have opened your QuickBooks file in the background, simply click the **Auto-Locate** button. The name and path will be automatically inserted in the text box for you.

10. Click Next.
11. The wizard automatically loads all of your DynaSCAPE Manage divisions and profit centers on the left side of the screen and all of your QuickBooks Income Accounts on the right hand side of the screen. There is a blank column titled Income Account used for establishing relationships between the two lists. In order to export your DynaSCAPE Manage invoice revenues to the appropriate income accounts, DynaSCAPE Manage requires that you match all of your DynaSCAPE Manage profit centers to QuickBooks Income Accounts. When posting DynaSCAPE Manage invoices, each DynaSCAPE Manage invoice line item’s profit center dictates to QuickBooks the appropriate income account to be credited. To match two accounts, drag the name of the QuickBooks account in the blank space beside the desired DynaSCAPE Manage profit center. You may match the same QuickBooks income account to any number of DynaSCAPE Manage profit centers. If you make a mistake, simply drag and drop the appropriate QuickBooks account over top of your mistakes. You must match all DynaSCAPE Manage profit centers before continuing.

12. After all profit centers have been associated with a QuickBooks income account, click Next.

13. The Expense Account matching screen will then appear. All of the expense accounts from the QuickBooks company file will be listed in the right side of the screen. Drag over any expense accounts that will be included in the DynaSCAPE manage database. These expense accounts will be available on
the Supplier Invoices to link them back to the QuickBooks Expense Accounts. Only the QuickBooks Expense Accounts that are used in DynaSCAPE Manage need to be included. Click Next when finished.

14. The next screen for Customer matching. The customer matching screen loads all your DynaSCAPE Manage customers on the left hand of the screen and all your QuickBooks customers on the right hand side of the screen. Using this screen, you need to match all of the customers that exist in both QuickBooks and DynaSCAPE Manage. By matching customer records, you are informing both applications (DynaSCAPE Manage and QuickBooks) that their customers correspond with the ‘matched’ customer in the other. DynaSCAPE Manage will use the customer name field to automatically match any customers that it can. To match unmatched customers, drag and drop the customer name from the QuickBooks window (right side) into the blank space beside the customer name in the DynaSCAPE Manage window (left side). You do not need to match all customers, only the customers that exist in both applications. Customers that exist in DynaSCAPE Manage only will be automatically added to your
QuickBooks database during the customer synchronization process (covered later in this chapter).

15. When finished matching all customers, click Next.

16. The next screen is the supplier matching screen. The principle of this screen is the same as that of the customer matching screen. Match the names of all suppliers (or, vendors in QuickBooks terminology) that exist in both DynaSCAPE Manage and QuickBooks. DynaSCAPE Manage suppliers are listed on the left side of the screen, QuickBooks vendors listed on the right. Drag and drop the name of the QuickBooks vendor in the blank space beside the DynaSCAPE Manage supplier that matches. You do not need to match all suppliers, only the ones that exist in both applications. Suppliers that exist only in your DynaSCAPE Manage database will be automatically
added to your QuickBooks company file during the Supplier synchronization process (covered later in this chapter).

17. When finished matching identical suppliers/vendors, click Next. DynaSCAPE Manage will pause for a few seconds while it writes the matching information to its database.

18. The next screen is for matching employee records and works on the same principles as the customer and supplier matching screens. Drag and drop the names of all QuickBooks employees that match DynaSCAPE Manage employees into the appropriate cell. You do not need to match all employees, only the ones that exist in both databases. Employees that exist in DynaSCAPE Manage and not in your QuickBooks company file will be
added automatically during the Employee synchronization process (covered later in this chapter).

19. The final screen requests that you repeat the matching process, but this time for sales taxes. Match your QuickBooks tax items (listed on the right hand side of the screen) with their appropriate DynaSCAPE Manage tax code counterparts (listed on the left hand side of the screen) by dragging and dropping the name of the QuickBooks sales tax item into the blank space beside its DynaSCAPE Manage counterpart. You must match any taxes that will be used on invoices. If a tax exists in DynaSCAPE Manage
but not in QuickBooks, errors could occur while posting invoices that use that tax.

**Important**
For US versions of QuickBooks only - Leave the Exempt (EXMT) tax unmatched. This will pass the correct information from DynaSCAPE Manage to QuickBooks during the synchronization.

20. Click **Next** when finished matching your sales taxes.

21. Congratulations. You have successfully matched your DynaSCAPE Manage and QuickBooks databases. Click **Finish** to close the wizard and return to the DynaSCAPE Manage main screen.
Synchronizing Customers/Suppliers/ Employees

Synchronizing your customer/supplier/employee lists before posting information is critical. Synchronizing your customer list, for example, means that DynaSCAPE Manage will examine your QuickBooks company file looking for all customers in its database. Customers that do not exist in QuickBooks will be automatically added. Customers who have had their information changed in DynaSCAPE Manage will have their QuickBooks information updated automatically.

Because DynaSCAPE Manage monitors the QuickBooks company file for outdated or missing information, it is important to get into the habit of adding or editing customer information using DynaSCAPE Manage. Once you have edited DynaSCAPE Manage information, DynaSCAPE Manage will automatically update your QuickBooks company file the next time you run a synchronization.

It is important to run synchronizations regularly, or, at least before posting invoices/timesheets. If a customer or employee exists in DynaSCAPE Manage but not in QuickBooks, there will be errors during posting.

The process for synchronizing customers, suppliers, and employees is all the same, each one just uses its own button. For the purposes of this demonstration, we will illustrate how to conduct a customer synchronization.

Tips and Tricks
Remember, running QuickBooks in the background (open QuickBooks with your company file, then minimize) will greatly improve the speed of the synchronization process.

1. Use the menu bar and click Accounting | QuickBooks Synchronization.

2. The DynaSCAPE Manage - QuickBooks Synchronization screen appears. Before performing a synch, setup all of the options. You can choose whether to Update all records or Update only records that have been changed since the last synch. Updating only the records that have been
changed since last synch is a much faster process and should be used by default.

3. Check the customer synchronization options. These options determine how QuickBooks billing addresses are constructed. For more information and samples, click the More Information task.
4. Once your options have been configured appropriately, click the **Customers** button on the right hand side of the screen to begin synchronizing customer information.

5. A progress bar appears on your screen indicating the status of the synchronization.

6. When the progress bar is complete and the progress window closes, the synchronization is finished.

7. If errors occurred during the import/export process a warning screen will appear. To view them click **Yes**. Alternatively you can also view the results of the synchronization by clicking the **View last import/export log file** in the task bar. You can also view log files manually as they are stored as text...
files in the **Accounting** folder in your DynaSCAPE Manage installation directory (C:\Program Files\DynaSCAPE\Manage\Accounting).

A sample log file is illustrated below:

Any errors with the synchronization will be itemized individually and, where possible, explained in detail. Summary information at the bottom of the log file indicates how many customers were checked, added, updated, and errored.

The process for synchronizing suppliers and employees is exactly the same. Click the corresponding **Suppliers** or **Employees** button on the DynaSCAPE Manage/QuickBooks synchronization screen.
Posting Invoices

Posting invoices to QuickBooks is the final stage of a DynaSCAPE Manage quote/contract's life cycle. Once the invoice is posted to accounting, the rest of the functionality (payment tracking etc.) is handled by QuickBooks.

Each line item on an invoice has a profit center associated with it. Using these profit centers, DynaSCAPE Manage will create a QuickBooks invoice which credits the income account corresponding to each profit center (as specified in the QuickBooks Setup Wizard), and debits the customer’s accounts receivable.

Important
Remember to synchronize your customers before posting invoices. If a customer exists in DynaSCAPE Manage and not in QuickBooks, the selected invoice posting will fail.

Remember: Posting invoices is much faster when QuickBooks is running in the background.

There are three different ways to post an invoice:
1. Post a single invoice (for instructions, refer to the Invoicing chapter)
2. Post an invoice run (for instructions, refer to the Invoice Runs chapter)
3. Post invoices using the invoice posting screen (explained below).

1. Select Accounting | Post Invoices to QuickBooks.

![Image of invoice posting screen]

2. The invoice posting screen appears. All unposted invoices are displayed in the invoice posting screen. Invoices are grouped by the month and year of their invoice date.

3. Place a checkmark beside any/all invoices that you wish to post to QuickBooks. To quickly select all invoices, you can use the Select all for posting task on the screen's task menu. You can also right-click any invoice.
in a month and select the option to **Select all invoices in group** to select all invoices for a specific month.

4. When you have finished selecting all invoices for posting, click the **Post selected invoices** task.
5. A progress window appears. DynaSCAPE Manage attempts to connect to your QuickBooks company file, then attempts to post all selected invoices.

6. When the posting process is complete, the progress window disappears and you are returned to the invoice posting screen. If invoice(s) have been successfully posted, they will no longer appear on the invoice posting screen.

7. If any invoices were not posted successfully, you can click the View last posting log to open a text file with a complete description of invoice posting results. This includes error descriptions for invoices that were not successfully posted.
Posting Timesheets

DynaSCAPE Manage timesheets can also be posted to QuickBooks as timecards. Timesheet information can be posted individually or by groups of timesheets. To learn how to post timesheets to QuickBooks, follow the instructions below.

Important
Remember to synchronize your employees before posting timesheets to QuickBooks. If an employee is on a DynaSCAPE Manage timesheet and not in your QuickBooks company file, the timesheet posting will fail.

Remember: Posting timesheets is much faster when QuickBooks is running in the background.

Instructions for posting a single timesheet to QuickBooks are found in the Timesheets chapter. The following instructions will guide you through the process of posting any number of selected timesheets.

1. To post timesheet(s) to QuickBooks, start from the Timesheets section of the DynaSCAPE Manage main screen.

2. Hold down [Ctrl] or [Shift] while clicking timesheets to select multiple timesheets. Click on the Export to QuickBooks link in the task menu (or
right-click any selected timesheet to bring up the timesheet popup menu and click the **Export selected timesheets to QuickBooks** menu option).

3. The **Export Timesheet Information to QuickBooks** wizard appears on your screen. You can export timesheet information in two ways: **By timesheet tasks** or **By timesheet**. If you choose to export by timesheet tasks, information in QuickBooks is more comprehensive and can be customer or job specific. Exporting timesheet information by timesheet is the most simple option; it totals of all the employee's hours per timesheet and posts only the total (daily) hours to QuickBooks.
4. When you have selected the appropriate option, click the **Export** button to export your timesheet information to QuickBooks.

5. DynaSCAPE Manage attempts to connect to your QuickBooks file, then exports the selected timesheet information.

6. When completed, the **Export Timesheet Information to QuickBooks** wizard appears back on the screen. If any error(s) occurred during the export, a message at the bottom of the screen will indicate so.

7. If error(s) occurred, click the **Click here to view log...** task to view a copy of the error log.

Click **Close** to return to the DynaSCAPE Manage main screen.
Synchronizing with Microsoft Outlook

✓ Export your contacts to Microsoft Outlook

The Microsoft Outlook™ export in DynaSCAPE Quote/Manage allows you to export your contact information to a Microsoft Outlook Contact folder.

This feature allows you to use your DynaSCAPE Quote/Manage contact information in Outlook for the purposes of sending emails, tracking dates, and scheduling meetings, appointments and other important events without having to recreate your contact information manually in Outlook.

Further, once you have exported your contact information to Outlook, you can synchronize your contact information with a PDA.
Exporting Contacts to Microsoft Outlook

The export to Outlook allows you to export any of the following types of contacts:

- Customer Contacts
- Jobsite Contacts
- Supplier Contacts
- Unassociated Contacts -- contacts that are not related to any customer or supplier
- Employee Contacts

If a contact already exists in Outlook, DynaSCAPE Quote/Manage will simply update the information in that contact record, enabling you to keep your information in Outlook up to date.

Start from the DynaSCAPE Quote/Manage main screen.

1. From the DynaSCAPE Quote/Manage menu bar, click Tools | Export contacts to Outlook...

2. The Export Contacts to Microsoft Outlook screen appears. The first page of the wizard is a welcome screen. Click Next to proceed.

3. Select the contact types that you wish to export to Outlook. Note that under the Customer Contacts option you have the choice of whether or not you wish to include residential contacts. When you select this option DynaSCAPE Quote/Manage exports both residence information and contact information to Outlook. For more information on how DynaSCAPE Quote/Manage stores residence and contact information,
please refer to the chapter entitled Customers. Note that selecting this option usually results in duplicate information being exported to Outlook.

4. Besides selecting the contact types you wish to export to Outlook, you must also indicate whether or not you want to overwrite the notes and/or comments currently entered for each Contact in Outlook. If you want to keep the existing comments in Outlook, select the first option: Do not overwrite my Outlook notes/comments. If you want the notes/comments in Outlook to be replaced with the information you have in DynaSCAPE Quote/Manage, select the second option: Update my Outlook notes/comments.

5. Once you have specified the contact types you want to export and have indicated how to handle notes and comments, click Next to proceed.

6. Click the button marked ... to select the Outlook folder into which the DynaSCAPE Quote/Manage contact information will be exported. Note:
you must select a Contacts folder. Once you have selected the folder to which you want to export, click OK.

7. After you have selected the Outlook folder, you will see the name of the folder appear in the textbox. Verify that the folder name is correct. If you wish to make any changes on the previous page of the wizard, click Back to go back to that page and make the changes. When you are ready to begin the export, click Finish.

8. DynaSCAPE Quote/Manage will now export your contact information based on the options you selected. Upon completion, a summary of the results is displayed. Click Exit to complete the process.

Open your Outlook Contacts folder and you will find your DynaSCAPE Quote/Manage contact information.
In this chapter you will learn to:

✓ Add one-time and recurring contracts to a schedule
✓ Assign contracts to a specific crew(s)
✓ Edit scheduled contracts
✓ Generate a timesheet from the schedule
✓ Map a route using Microsoft MapPoint™

This chapter will cover the process of scheduling your contracts in DynaSCAPE Manage. You will be shown how to schedule both construction type jobs (one-time, non-recurring) and maintenance type jobs (recurring). You will learn how to assign jobs to crews, edit scheduled jobs and create timesheets from the schedule screen. Using Microsoft MapPoint™ (not included) you will be able to see the best routes for your crews in order to maximize efficiency.
Introduction to Scheduling Contracts

The Scheduling tab in DynaSCAPE Manage is used to assign both one-time and recurring contracts to a specific time, day, week and month on the calendar. Each contract can be assigned to an individual crew or several crews.

The schedule can be viewed by day, week or by month. It can also be viewed by individual crew or by multiple crews to give you control of what information you need to see.

Timesheets can be generated for crews and individuals from the Schedule screen.

The Scheduling Screen

To access the Scheduling screen click either the Scheduling link in the shortcut bar or the Scheduling icon on the Main page.

The Scheduling screen is divided into two sections. The left side of the screen (taskbar) displays the taskbar calendar, your crews list and a task list. The main screen displays the schedule. This screen can be changed to view daily, weekly or monthly schedules.
The Taskbar Calendar

The taskbar calendar defaults to the current month with the current date circled in red. You can use this calendar to control which day, week or month is shown in the scheduling main screen. Scroll through the taskbar calendar to choose any month to view.

The Crews List

The Crews List in the task bar displays the crews that you have set up in your database. Choose to display as many crews as you wish in the schedule by selecting the crews and clicking Refresh Schedule. The last setting each user chooses will be remembered for that user.
Calendar Views

The calendar can be switched between Daily, Weekly or Monthly Schedule views. The first time you open the scheduling screen the view is set to Weekly. To switch the view to Daily or Monthly, click on the preferred schedule view option near the top of the current screen.

To change the specific day, week or month you wish to see, click on the arrows on either side of the view options. You can also use the task bar calendar to control which day, week or month is shown in the scheduling main screen.
Steps to Adding Contracts to the Schedule

Follow these steps to add contracts to the schedule:

1. Click on the Add contract to schedule option under Tasks in the task bar.

2. An Add Contracts Panel will open on the right side of the screen displaying any contracts that do not have an Inactive status assigned to them.

3. Make sure to select the Day or Week view before adding a contract to the schedule.

4. Select which crew you wish to assign the contract to by clicking on the crew name in the task bar and click Refresh Schedule. Crews can be assigned later in the Schedule Item Screen as well.
5. To add the contract to the schedule, click, hold and drag the contract to the specific day and time you wish the job the start.

6. A Scheduling screen will automatically appear. If you selected a maintenance type contract (recurring), this panel will contain slightly different information than if you selected construction type contract (one-time). The process is also slightly different for each type:

**Construction Type Contracts (one-time jobs):** If you have labor items in your contract, the right side of the Schedule Item Screen will display the Estimated contract man-hours under Estimated Contract Schedule Details. The total hours displayed here is automatically determined by the number of hours set in the original contract. You can adjust the numbers if you wish. Proceed to step #7.

**FIGURE 1. Construction Type Contract Schedule Item Screen**

**Maintenance Type Contracts (recurring jobs):** For maintenance type contracts the duration for each visit is default to one hour and must be manually adjusted each time you add a maintenance contract to the schedule. You can do this by adjusting either the Start and End Times or by adjusting the duration. After adjusting the hours, proceed to step #7.
7. Select the crew or crews that you wish to perform the selected contract. The crew may already be selected if you completed step #4. The size of the crew you select will affect how many hours or days the job will take. At this point you can adjust the contract man-hours, add contingency man-hours (construction only), adjust crew size, add drive-time and down-time hours (construction only).

8. Click Save & Close and the contract will appear on the schedule.

The Add Contracts Panel

The Add Contracts Panel is opened by clicking on the Add contract to schedule task in the taskbar. This panel contains two tabs:

1. All Active Contracts
2. Unscheduled Active Contracts

Scheduled vs Unscheduled Contracts

As noted earlier, only contracts that do not have an Inactive status assigned to them are visible.

The All Active Contracts tab displays all the active contracts regardless of whether they have been scheduled or not.
The **Unscheduled Active Contracts** tab displays only contracts that have yet to be scheduled. This is the recommended tab to view when adding contracts to the schedule.

To view the display of your choice, click on the preferred tab near the top of the panel.

**Grouping and Sorting Options**

The list of contracts can be grouped and sorted in a number of different ways. The list will always be sorted by division.

To change the way contracts are grouped, simply click on the preferred grouping option under **Grouping Options** in the Add Contracts Panel.

The list of contracts can be further sorted by clicking on one of the column headings. For example, you can group your contracts by **Customer Status** and then sort them further by **Start Date**.
Adding Contracts to the Different Views

Contracts can be dragged and dropped onto either the Daily, Weekly or Monthly Schedule view. Adding to the Daily or Weekly view is somewhat different from adding to the Monthly view:

Adding Contracts to the Daily or Weekly Schedule View: When adding contracts to the Daily or Weekly views you can drag and drop the contract onto any time of day you wish to start the job. When the Schedule Items Panel appears, the active crew will automatically be selected. This is the recommended view for scheduling maintenance type contracts, or any job that takes less than one day, so that you can place the contract onto a specific time of the day.

Adding Contracts to the Monthly Schedule View: When adding contracts to the Monthly view you cannot choose the starting time for the job. The starting time will automatically be set to your default starting time. When the Schedule Items Panel appears, the crew will not automatically be selected if multiple crews are selected in the main scheduling screen. This is the recommended view for scheduling large, one-time jobs.

Viewing Contracts from the Add Contracts Panel

To view a contract, right-click on the name in the list and select View Contract.

Scheduling Conflicts

If you are adding a contract to the schedule and it overlaps a previously scheduled job, a Scheduling Conflicts panel will automatically appear, warning you that a scheduling conflict has been detected.
When the **Scheduling Conflicts** panel appears you have three options:

1. **Print** the detected conflicts.
2. **Continue** and ignore the conflict. If the conflict is just an hour or two overlapped, you can manually adjust the contract on the schedule screen.
3. **Cancel** the process and start over in order to avoid the conflict.
The Schedule Items Screen

The Schedule Items Screen will automatically appear when you drop a contract on the schedule. If you have selected a recurring type of contract (e.g. lawn maintenance), the right side of the screen will contain different information then a one-time contract (e.g. landscape construction).

Construction Type Contracts (One-time Jobs)

The Schedule Items Screen contains items particular to the contract selected.

![Image of the Schedule Items Screen]

### TABLE 1. Construction Type Schedule Items Screen Components

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Contract Man-hours</td>
<td>This number is automatically generated from the contract, reading the quantity of all labor items (will assume all labor items are measured in hours).</td>
</tr>
<tr>
<td>Extra contingency man-hours</td>
<td>Click on the Calc button to add a percentage of extra contingency man-hours to be included in this job.</td>
</tr>
<tr>
<td>Estimated crew size</td>
<td>This is automatically generated from the number of people in the selected crew.</td>
</tr>
<tr>
<td>Drivetime to/from jobsite</td>
<td>Here you can add extra time to be spent driving to and from the jobsite each day.</td>
</tr>
</tbody>
</table>
TABLE 1. Construction Type Schedule Items Screen Components

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Downtime hrs/man</td>
<td>Here you can add extra time for breaks and lunches per man, per day.</td>
</tr>
<tr>
<td>Estimated time</td>
<td>This is the total number of days required to complete the job based on all the above calculated hours, based on the number of people in each crew.</td>
</tr>
<tr>
<td>Job date</td>
<td>This is the start date for the selected job.</td>
</tr>
<tr>
<td>Start date</td>
<td>This is the start date for the selected job.</td>
</tr>
<tr>
<td>Single day</td>
<td>This will be automatically selected if the job is estimated to take less than one day.</td>
</tr>
<tr>
<td>Consecutive days</td>
<td>If selected, this number will be automatically determined by the number of days estimated.</td>
</tr>
<tr>
<td>Include Saturday and/or Sunday</td>
<td>Check these if you wish to include working on Saturdays or Sundays for this job.</td>
</tr>
<tr>
<td>Estimated labor hours</td>
<td>Shows only the labor hours the are included in the contract.</td>
</tr>
<tr>
<td>Total scheduled manhours</td>
<td>Shows actual hours that have been scheduled for this job.</td>
</tr>
<tr>
<td>Current timesheet hours</td>
<td>Shows hours that have been recorded on timesheets for this job.</td>
</tr>
<tr>
<td>Average timesheet hours</td>
<td>Show the average number of hours recorded on timesheets for this job.</td>
</tr>
<tr>
<td>Status summary bar</td>
<td>The status bar graphically shows the % of expected hours recorded on timesheets in relation to the estimated hours for this job.</td>
</tr>
<tr>
<td>Add Contract</td>
<td>Shows the name and description of the selected contract.</td>
</tr>
<tr>
<td>Job Description</td>
<td>This is automatically generated from the contract description. This can be edited for easier viewing in the schedule.</td>
</tr>
<tr>
<td>Assign Crews...</td>
<td>Displays your list of crews that you can assign to this job.</td>
</tr>
<tr>
<td>Scheduled job times are critical</td>
<td>Check this if this job cannot be moved to another start time. You are warned if you attempt to move this job or overlap it with another job.</td>
</tr>
<tr>
<td>Reason:</td>
<td>Type in this box the reasons why this job is critical for further reference.</td>
</tr>
<tr>
<td>Refresh job status summary info</td>
<td>Click here to refresh the Schedule Items Screen if you have made changes to the customer, contract or timesheets.</td>
</tr>
<tr>
<td>Related Areas</td>
<td>Click on one of the options to open and view a customer, jobsite or contract.</td>
</tr>
</tbody>
</table>
Maintenance Type Contracts (Recurring jobs)

The Schedule Items Screen contains items particular to the contract selected.

![Schedule Items Screen](image)

**Important:**

For maintenance type contracts the duration for each visit is defaulted to one hour and must be manually adjusted each time you add a maintenance contract to the schedule.

**TABLE 2. Maintenance Type Schedule Items Screen Components**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Date</td>
<td>This is the starting date on which the contract was placed.</td>
</tr>
<tr>
<td>Start Time</td>
<td>Shows the starting time for the selected job.</td>
</tr>
<tr>
<td>End Time</td>
<td>Shows the end time for the selected job.</td>
</tr>
<tr>
<td>Duration</td>
<td>This number must be adjusted for each contract added to the schedule. The default Duration is set to 1 hour. Change the start and end time to automatically calculate the duration, or adjust it manually.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Shows a list of tasks (with Profit Center) on the contract. Tasks can be selected to appear on the timesheets.</td>
</tr>
</tbody>
</table>
**TABLE 2. Maintenance Type Schedule Items Screen Components**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurrence - Daily</td>
<td>For jobs that recur daily you can select every weekday or any number of alternating days (e.g. every 2 days).</td>
</tr>
<tr>
<td>Recurrence - Weekly</td>
<td>Select the day of the week this recurring job will be scheduled for or select any number of weeks between recurrence.</td>
</tr>
<tr>
<td>Recurrence - Monthly</td>
<td>Here you have the option of choosing any day of the week of any month for the job to recur or any day number for any number of months.</td>
</tr>
<tr>
<td>Recurrence - One-time job</td>
<td>Here you can set a maintenance job to recur only once.</td>
</tr>
<tr>
<td>Range of recurrence - Start date/End date</td>
<td>Here you can select when a job will start and end or select how many recurrences to end after (in place of the <strong>End by</strong> date).</td>
</tr>
<tr>
<td>Estimated labor hours</td>
<td>Show only the total labor hours for all occurrences as determined by the contract.</td>
</tr>
<tr>
<td>Total scheduled manhours</td>
<td>Shows total hours that have been scheduled for this job, including all occurrences.</td>
</tr>
<tr>
<td>Current timesheet hours</td>
<td>Shows total hours that have been recorded on timesheets for this job for all occurrences.</td>
</tr>
<tr>
<td>Average timesheet hours</td>
<td>Show the average number of hours recorded on timesheets for this job.</td>
</tr>
<tr>
<td>Status summary bar</td>
<td>The status bar graphically shows the % of expected hours recorded on timesheets in relation to the total contract hours for this job.</td>
</tr>
<tr>
<td>Add Contract</td>
<td>Shows the name and description of the selected contract.</td>
</tr>
<tr>
<td>Job Description</td>
<td>This is automatically generated from the contract description. This can be edited for easier viewing in the schedule.</td>
</tr>
<tr>
<td>Assign Crews...</td>
<td>Displays your list of crews that you can assign to this job.</td>
</tr>
<tr>
<td>Scheduled job times are critical</td>
<td>Check this if this job cannot be moved to another start time. You are warned if you attempt to move this job or overlap it with another job.</td>
</tr>
<tr>
<td>Reason:</td>
<td>Type in this box the reasons why this job is critical for further reference.</td>
</tr>
<tr>
<td>Refresh job status summary info</td>
<td>Click here to refresh the Schedule Items Screen if you have made changes to the customer, contract or timesheets.</td>
</tr>
<tr>
<td>Related Areas</td>
<td>Click on one of the options to open and view a customer, jobsite or contract.</td>
</tr>
</tbody>
</table>
Default Settings for the Calendar View

When the Scheduling screen is first opened, the default view start and end times are preset, as are the default working start and end times, according to common industry standards. They can however, be adjusted to suit your company norms.

Changing the Default Start and End Times

To change the default start and end times for both the calendar view and for the working times select Configuration | Schedule Configuration from the menu bar.

A Schedule Configuration panel will appear. This panel is divided into two sections that can be adjusted. Click Save after you have made your changes:
TABLE 3. Schedule Configuration Panel Items

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default start time</td>
<td>This is the automatic working start time that all jobs will be set to unless you drop them onto a specific time. Any contracts dropped onto the Monthly View will automatically be set to this start time.</td>
</tr>
<tr>
<td>Default end time</td>
<td>This is the automatic working end time that all jobs will be set to unless they do not reach the work end time. Any contracts dropped onto the Monthly View will automatically end at this time.</td>
</tr>
<tr>
<td>Default down time/day</td>
<td>Here you can set the number of down time hours that will occur for each typical day (lunch, travel etc.). If you have already accounted for this within your contracts, set this to ‘0’.</td>
</tr>
<tr>
<td>Calendar start time</td>
<td>This only refers to the earliest hour that you will be able to see in the Daily and Weekly calendar views.</td>
</tr>
<tr>
<td>Calendar end time</td>
<td>This only refers to the latest hour that you will be able to see in the Daily and Weekly calendar views.</td>
</tr>
<tr>
<td>Show calendar in increments of...</td>
<td>The Daily and Weekly calendars will be broken down by the desired minutes increment (5, 10, 12, 15, 20, 30 or 60).</td>
</tr>
<tr>
<td>Show Saturday or Sunday on calendar view</td>
<td>Set these if you wish to show Saturdays or Sundays in the Weekly view. Saturdays and Sundays will always show in the Daily and Monthly views.</td>
</tr>
</tbody>
</table>
Moving and Editing Scheduled Times

Once a contract has been added to the schedule it can still be moved around and adjusted to suit any situation. Jobs can be edited on both the Daily, Weekly and Monthly view grid and in the Schedule Items Screen. The Schedule Items Screen will appear if you double-click on a job on the screen.

Moving Small One-time Jobs on the Grid

To move a small scheduled job on the grid, simple click and hold on the job you wish to move and drag it to the new day and/or start time. A pink box will appear as you move across the grid. Release your mouse button when you are satisfied with the new location. You can move a job to any visible time or day on the grid.

Moving Large and Recurring Jobs on the Grid

The flexibility of the DynaSCAPE scheduling screen allows you to move both the entire job or just part of a job (large or recurring). A large job here refers to a construction type job that spans more than one day.

Moving an entire large or recurring job on the grid: To move an entire large or recurring job on the grid you must select the very first day of the job. Click and hold on the first day of the job and drag it to the new day and/or start time. A pink box will
appear as you move across the grid. When you release your mouse a warning panel will appear, informing you that you are attempting to move part of a scheduled job:

To move the entire job click on the Edit the recurrence series option and click OK. The entire job, including the recurrence will move to the new location on the schedule.

**Important note about moving jobs:**

If you have selected a part of a scheduled job somewhere in the middle of the job and chose the Edit the recurrence series option, only the recurring days past and including the day you selected will move. You must select the first day to move the entire scheduled job.

**Moving a single day of large or recurring job on the grid:** To move one day of a large or recurring job on the grid select the day of the job you wish to move. Click and hold and drag it to the new day and/or start time. A pink box will appear as you move across the grid. When you release your mouse a warning panel will appear, informing you that you are attempting to move part of a scheduled job.

To move just one day of the job on the grid, click on the Edit selected job only option and click OK. Only the one day of the job, (not the recurring days) will move to the new location on the schedule. This is useful for a maintenance contract that needs one of the recurrences to move to accommodate for a holiday or bad weather.
Editing Small One-time Jobs on the Grid

All scheduled jobs can be edited right on the grid. To edit smaller, one-time jobs on the grid, click and drag the top or bottom edge to stretch or shrink it to the desired length of time. **Note:** These changes do not affect the original contract.

Editing Large and Recurring Jobs on the Grid

You can edit all or part of large and recurring scheduled jobs right on the grid. To edit recurring jobs on the grid, click and hold and drag the top or bottom edge to stretch or shrink it to the desired length of time. When you release your mouse a warning panel will appear, informing you that you are attempting to move part of a scheduled job.
Editing an entire large or recurring job on the grid: To edit every day of a large or recurring job on the grid you must select the very first day of the job. Click and hold and drag the top or bottom edge to stretch or shrink it to the desired length of time. A pink box will appear as you move up or down on the grid. When you release your mouse a warning panel will appear, informing you that you are attempting to edit part of a scheduled job:

To edit the entire job click on the **Edit the recurrence series** option and click **OK**. Each recurrence of the entire job will be stretched or shrunk to the new length of time.
Important Note About Moving Jobs:

If you have selected a part of a scheduled job somewhere in the middle of the job and chose the Edit the recurrence series option, only the recurring days past and including the day you selected will change. You must select the first day to edit the entire scheduled job.

Editing part of a large or recurring job on the grid: To edit one day of a large or recurring job on the grid select the day of the job you wish to change. Click and hold and drag the top or bottom edge to stretch or shrink it to the desired length of time. A pink box will appear as you move up or down on the grid. When you release your mouse a warning panel will appear, informing you that you are attempting to edit part of a scheduled job:

To edit just one day of the job on the grid, click on the Edit selected job only option and click OK. Only the one day of the job, (not the recurring days) will be stretched or shrunk to the new time length on the schedule. Note: These changes do not effect the original contract.

Viewing, Editing and Deleting Scheduled Jobs

To view details of a scheduled job, double-click on the job on the grid and the Scheduled Items Screen will appear. If you have selected a large (longer than one day) or a recurring job, a warning panel will appear, informing you that you are attempting to edit part of a scheduled job. If you are going to make changes to the scheduled job, select the Edit the recurrence series option and click OK and the Scheduled Items Screen will appear.
Important note about editing jobs:

If you have selected a part of a scheduled job somewhere in the middle of the job and chose the Edit the recurrence series option, only the recurring days past and including the day you selected will be edited. You must select the first day to edit the entire scheduled job.

Once the Scheduled Items Screen opens you can view the Job Status Summary, adjust the duration, change the start date, change the recurrence and range of recurrence (for maintenance jobs) and assign the job to a different crew or crews.
To delete a scheduled job, click on the delete option at the bottom of the Job Status Summary screen. A warning panel will appear to give you the option of deleting or cancelling the delete process:

![Delete Scheduled Job panel](image)

### Important note about deleting jobs:

*If you have selected a part of a scheduled job somewhere in the middle the job and choose the Edit the recurrence series option, only the recurring days past and including the day you selected will be deleted. You must select the first day to delete the entire scheduled job.*

If you have made any changes to the job select **Save & Close**. A panel will appear, warning you that you have made changes that will effect this job on the schedule. If you are satisfied that the changes you made are correct, click OK.

![Save & Close panel](image)

The selected job will change on the schedule screen based on any changes you made.

If you are adding a contract to the schedule and it overlaps a previously scheduled job, a **Scheduling Conflicts** panel will automatically appear, warning you that a scheduling conflict has been detected. At this point you can choose to cancel the change and make appropriate adjustments to the job.

### Generating Timesheets from the Schedule

Timesheets can be created directly from the scheduling screen in DynaSCAPE Manage by using the **Timesheet Generator** wizard. The timesheet generator wizard will create a timesheet for a crew based on scheduled jobs. All labor items for each contract will automatically be included on the timesheet.

To generate a timesheet from the schedule follow these steps.
1. Click on the **Generate timesheet from schedule** option in the taskbar.

The **Timesheet Generator** panel appears.
The Timesheet Generator panel displays the following information and options to control the creation of the timesheet:

### TABLE 4. The Timesheet Generator Panel

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select schedule date:</td>
<td>When the schedule view is the Daily Schedule the currently viewed date is displayed automatically. When the schedule view is the Weekly Schedule the first day of the currently viewed week is displayed automatically. When the schedule view is the Monthly Schedule the first day of the currently viewed monthly is displayed automatically.</td>
</tr>
<tr>
<td>Select Crew:</td>
<td>If only one crew is visible on the schedule, that crew will be displayed. If more than one crew is visible on the schedule, the first crew on the list will be displayed. To select a different crew click on the arrow to the left of the crew name and select a new crew.</td>
</tr>
<tr>
<td>Select Division</td>
<td>Chose which division for which the timesheet will be scheduled.</td>
</tr>
<tr>
<td>Include equipment</td>
<td>Check this option if you wish to include allocated equipment in the timesheet. This option will be kept in memory and you will not need to select it again.</td>
</tr>
<tr>
<td>Include materials</td>
<td>Check this option if you wish to include allocated materials in the timesheet. This option will be kept in memory and you will not need to select it again.</td>
</tr>
<tr>
<td>Generate</td>
<td>Click this to generate the timesheet once all the preferred options are selected.</td>
</tr>
</tbody>
</table>

2. Once you have selected the preferred options for your timesheet, select the Generate button at the bottom of the panel. The Timesheet screen will open and all labor items for each contract will automatically be included on the timesheet for the selected crew for that day. If you have checked the Include equipment and Include materials options, equipment and materials from the contract will be included as well.

3. The timesheet will generate columns for each employee in the crew. Enter the employee hours against contract labor items.

For further details and information on timesheets please refer to the chapter in this manual called Timesheets.
Printing the Schedule

The daily schedule for each crew can be printed exactly as it appears on the screen or select the option to print a more detailed report.

1. Click on the **Print or export Schedule** option in the taskbar.

2. In the **Schedule Print** panel, select one of the three options: A) **Print schedules as it appears on the screen**, B) **Export schedule to Microsoft Excel** or C) **Print schedule details**. See chart below for more information:

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print schedule as it is displayed on the screen</td>
<td>Check this option if you wish to print the schedule as it appears on the screen. When you click <strong>Generate</strong>, the schedule will be sent directly to your computer's default printer.</td>
</tr>
<tr>
<td>Export schedule to Microsoft Excel</td>
<td>Check this option to export the schedule to Excel for printing or editing.</td>
</tr>
</tbody>
</table>
**TABLE 5. Schedule Print Panel**

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print schedule details</td>
<td>Check this option if you wish to print a detailed schedule report using the chosen options.</td>
</tr>
<tr>
<td>Report</td>
<td>The name of the report to print.</td>
</tr>
<tr>
<td>Start date</td>
<td>Select the first date you wish to show on the schedule report.</td>
</tr>
<tr>
<td>End date</td>
<td>Select the last date you wish to show on the schedule report. The report will show the schedule between and including the start and end date.</td>
</tr>
<tr>
<td>Select Crews</td>
<td>Check off which crews you wish to show in the schedule report.</td>
</tr>
<tr>
<td>Modify this report's</td>
<td>Click to open the Template designer for the report currently in the Report drop down list.</td>
</tr>
<tr>
<td>template design</td>
<td></td>
</tr>
<tr>
<td>Generate</td>
<td>Click this to print the schedule as it appears on the screen or to generate a report Schedule/Route Sheet report depending on which print option was selected.</td>
</tr>
</tbody>
</table>

**Important:**

*If you selected the Print schedule as it is displayed on screen option and click Generate, the schedule will be sent directly to your computer’s default printer. If you chose the Print schedule details option, a Schedule/Route Sheet report will be displayed, allowing you the option of printing or canceling the report.*

**Creating a Route using Microsoft MapPoint™**

DynaSCAPE Manage can generate scheduled job routes through Microsoft MapPoint™. This feature will help you refine your schedule by listing a route and showing a map of your scheduled jobs. MapPoint™ will show travel time and distance between sites as well as provide a printed route for the selected crew for the day.

To Create a route using Microsoft MapPoint™ follow these steps:
1. Click on the **Map Routes** option in the taskbar to open the **Map Route** panel.

2. The **Map Route** panel will display your starting address and map options.

3. Edit the starting address if it is different from the address displayed. Whatever starting address you enter here will become the new starting address every time you open the Map Route panel from this point. Select your crew and start date. See the chart below for a detailed description of the **Map Route** panel:

   **TABLE 6. The Map Route Panel**

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting Address</td>
<td>Enter the complete starting address information for your crew here.</td>
</tr>
<tr>
<td>Map Options</td>
<td>These options allow you to select your mapping software, your crew and date.</td>
</tr>
</tbody>
</table>
TABLE 6. The Map Route Panel

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create map using:</td>
<td>MapPoint™ is the only software currently available.</td>
</tr>
<tr>
<td>Select crew:</td>
<td>You will need to select the crew you wish to create a route for. The default will always be Unassigned.</td>
</tr>
<tr>
<td>Date:</td>
<td>The default date will be always be the day you are viewing in the Daily Schedule view, the first day of the week in the Weekly Schedule view and the first day of the month in the Monthly Schedule view.</td>
</tr>
<tr>
<td>Ok</td>
<td>Click Ok to create the route in MapPoint. This will open MapPoint™ and display the route.</td>
</tr>
<tr>
<td>Close</td>
<td>This will cancel the process and close the panel.</td>
</tr>
</tbody>
</table>

4. Click OK to create the route in MapPoint™. MapPoint™ will open and your route list and map for your crew will appear for the day.

5. Now you can print the route in MapPoint™ or use the information gathered here to refine your schedule to create a more efficient route if...
needed. The MapPoint map shows the sequence of each of the crew's stops and highlights the suggested route to follow.
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