

Reminders / Project Scheduler Training Outline

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General Comments

Using Studio for Design Projects / Accounting and Project Management

Reminders

General review of Reminders Module

- Using Filters to locate specific Items
- Searching for items in description
- Priority Codes – User oriented / tagging high-priority items
- Printing reports and daily to-do lists

Non Item-Based Reminders – Phone Messages / Notes / General To-Do Reminders

Item-Based Reminders

- Using Item-Based Reminders instead of Notes
- Communicating with all staff members
- Retaining history of notes / Comments / Conversations regarding Items

Action List

- Remove AutoInvoice, AutoOrder and AutoQuote if they exist in Action list
- Adding / Defining Actions

- Priority
- Automatic
- Email Client / Email Vendor
- Responsible

Project Scheduling

Managing Various Activities and Resources

Design Items / Design Phase / Construction Time Line / Sub Contractors / Other
Resources / Delivery Schedules

Visual Reporting – Internal / Contractor and client reports

Schedules are defined by reminders attached to Items

Action defines default start date and estimated completion date

Only reminders attached to Items appear in Project Scheduling screen

Special rooms – Construction / Resources / Sub Contractors

No print feature for special rooms

Use of various filters for finding specific project timelines