

## Office Settings

Version V3.20.05: 10 August 2012

### Customizing your iProjects application

You can customize your company's iProjects platform using **Office Settings**. There are three controls on this layout:

- Contact Types
- Resource Groups
- Default Account Code

The screenshot shows the 'Office Settings' tab selected in a navigation bar. Below the navigation bar, there are two main sections:

**Contact Types used for Project Team Assignments**

Sort	Group	Colour	Rate
10	Client		
20	Owner		
25	Architect		
30	Builder		
40	Project Manager		
50	Structural Engineer		
60	Landscape Architect		
70	Hydraulics		
80	Mechanical Services		
90	Electrical Services		
95	Facade Engineer		
100	Fire Services		
110	Lifts & Escalators		
120	Acoustical consultants		
130	Geotechnical		
140	Customer Planner / QS		
150	Other		

**Resource Groups used for PF21**

Sort	Group	Colour	Rate
1	Principal	Yellow	\$350
2	Project Director	Blue	\$225
3	Project Manager	Green	\$200
4	Architect	Turquoise	\$175
5	Draftsperson	Orange	\$125
6	CAD Operator	Pink	\$135
7	Administration	Purple	\$95

At the bottom, there is a 'Default Account Code Type' field with the value 'ABN' and a label 'Default Account Code Type to use for new Contacts'.

### Contact Types

The upper left schedule is where you can amend the list used for Project Team Assignments (Projects > Project Team tab), and as displayed in **PF13: Project Team**. By assigning these at a central, secure location, you are assured that these categories will be consistent across all projects.

You can change the order in which these are listed by changing the number in the left-hand column (press return after making the change). You can delete any category using the trashcan icon. You can add any new category using the [New](#) button. Once you make these changes, the corresponding list in Projects > Project Team will be updated.

### Resource Groups

This schedule is where can change the categories in **PF21: Resource Plan**. By assigning these at a central, secure location, you are assured that these categories will be consistent across all projects.

Changing the Sort order will re-order them. You can change colors if you want (but there isn't much point). You can change the charge-out rates here (which IS important). You can delete any category using the trashcan icon, and you can add new categories. Note that there is a blank open line at the bottom. You are limited to a total of ten chargeout rate categories.

Read UserGuide 4.4.3 > PF21: Resource Plan before making changes to this schedule.

### Default Account Code Type

See **Contacts > Details**; "Business/Tax Code" field. This field is used to set the "default" for new Firm contact records. (It does not change the setting for existing records). For Australia, you would make ABN the default; for US firms, you'd select EIN; in New Zealand, IRD.