CMAP

Self Service Setup

Choose from over 75 admin configuration tools for real organisational flexibility

Self serve with over 75 fixed admin configuration tools

CMAP's 'Self Serve' admin set-up combines the tailored benefits of a bespoke software solution, with the power & flexibility of the Cloud.

With over 75 configuration tools to play with, your organization has complete freedom to pick & choose from a vast number of fixed configuration options, which combine to reflect the way you work.

Most of these configurations can be edited via the **Admin** tab, an area which is only accessible to users with the appropriate administrative rights. These include:

- Roles & rates
- Commercials
- Accounting
- Time management
- Projects
- Security & user permissions

Security & User Access

Access Group Permissions Manage the permissions & feature access associated with a specific group of users – i.e. finance

Accounts Set up & edit users for your office(s)

Manage Authorised IP Addresses Increase security by restricting access to CMAP from specific locations

Security Groups Use this tool to manage system security & user access

Security Group Dashboard Manage your security group dashboard

Security Group Members Assign & edit user membership to each of your security groups

Security Group Permissions Manage group access to specific features & functionality in CMAP

User Access Groups Manage access to specific features & functionality for individual users

User Details Manage user details for each individual within your organisation, such as job role, office location & email address

User Figures Amend the historical figures stored against a user – i.e. weekly working hours, productivity targets

User Password Reset Reset user passwords

Your Users Add new users to CMAP, archive old ones & manage settings for each user

Your Users Dashboard Access Control the dashboard views that each user has access to

Your Users Permissions Manage all of your user permissions from one place

Your Users Report Access Control which reports each of your users have access to

Roles, rates & job costing

Add New Rate Use this tool to create a new rate card

Associate Cost Rate Manage the cost rates of a specific user

Contractor Cost Rates Define how much each of your contractors cost you per hour

Employee Cost Rates Define how much your employees cost you per hour

Fee Estimator Export Templates Manage templates for your fee estimator exports

Fee Estimator Roles Add new roles, update existing ones & archive the roles that you no longer require

Fee Estimator Role Groups Manage role groups for use in the Reconciliation Templates

Fee Estimator Templates Manage job costing templates available to use on the Fee Estimator

Lock/Unlock Fee Estimates Lock or unlock fee estimates for live projects

Preset Externals Manage pre-set fee estimator externals

Rate Card Roles Roles for the rate cards based on office selection

Rate Cards Set up new rate cards, change existing rates & archive the rate cards you don't use anymore

References Use this tool to manage references in the fee estimator

Role Cost Rates Define how much roles cost you per hour

Accounting & Finance

Category Default Tax Rates Manage your expense category default tax rates

Category Nominal Codes Manage your expense category nominal codes

Close Month Use this tool to close or re-open a month to support month-end & rev. recognition

Exchange Rates Keep exchange rates for each of the currencies you work with up-to-date

Expense Categories Manage & edit your expense categories – i.e. mileage, accommodation.

Expenses Import Import expenses for multiple users in bulk via csv file

Invoices Import Import invoices in bulk via csv file

Import Invoice Status Use to import invoice statuses as either 'paid' or 'unpaid' via CSV.

Import Purchase Invoices Import purchase invoices into a 'batch'.

Invoice, Credit & PO Templates Manage templates for credit notes, purchase orders & billing

Mileage Rates Manage mileage groups & rates for expense claims

Purchase Invoices Manage purchase invoices in batches

Single Line Purchase Invoices Manage single line purchase invoices

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System Currencies Manage the currencies you use in CMAP

Integrations

Export XERO Expenses

Export XERO Invoices

Export XERO Purchase Invoices

Map Tracking Categories

Pull Purchase Invoices from XERO

Push Expenses to XERO

Push Purchase Invoices to XERO

Push Sales Invoices to XERO

Push Sales Invoices to COINS

Timesheets

Import Timesheet Entries Use this tool to import timesheet entries

Internal Timesheet Codes Manage your internal timesheet codes – e.g. internal meeting, holidays etc.

Move Timesheet Entries Move timesheet entries between projects & tasks

Public Holidays Use this tool to manage public holidays

Re-open a Timesheet Use this tool to re-open a timesheet for a user

Time Banking Manage adjustments to any user’s time banking balance

Projects, Commercials & General Settings

Account Targets Manage financial targets for each of your accounts

Change Project Won Date Edit the win date of a specific project

Client Targets Set financial targets for your key clients

Custom Fields Create & edit custom fields to record & store any unique data your organisation collects about contacts/projects

Document Templates Manage your document templates

Dropdown List Options Manage & edit the options displayed in dropdown lists – i.e. project type, languages, sectors etc.

External Report Links Use this tool to create links to reports hosted on other applications

OpenAsset Field Mappings (Integration) Map your fields in CMAP to those in OpenAsset

Project Type Groups Set project types & sales targets

Re-open a Project Re-open closed projects to resource to it, book time, add fees or invoice to ir

Revert Back to Pipeline Revert a live project back to a potential project. This will remove time booked to the reverted project.

Tagging Use this tool to manage system tags

Team Targets Manage sales targets for each of your teams

Reporting & Custom Fields

There are 3 reporting options available for CMAP users:

1. Standard Reporting Already existing packaged reports. Filterable via custom fields that you can create

2. CMAP BI Report Builder, Custom Dashboards, Mobile Reporting. A true business intelligence suite built into the centre of CMAP. Extremely easy drag and drop report creation then view custom reports on your dashboard or phone.

3. Direct Reporting Service Attach external third party solutions to interrogate your data

You can also add custom fields against a user, company, contact and project.

User Skill Sets Create as many custom skill set fields as you wish such as languages, Revit proficiency, partner team, and then these all appear as filters in the resourcing reports

Other Custom Fields Capture key HR data against a user & any information relating to a project/company/contact.

Discover how the CMAP will help you to:

- Deliver projects on budget to maximise profitability
- Deliver projects on time to ensure client satisfaction
- Have clear visibility over project performance so you can make informed, timely decisions
- Gain buy-in from staff
- Give you the flexibility of a bespoke system to manage projects how you like

Visit www.cmap-software.com to arrange an online demo or call us on **+44 (0)1625 521 000** to discuss your requirements

CMAP