Rock Solid Technology Award
APPLY NOW!

In This Issue

The acquisition of Maxwell Systems delivers new opportunities for contractors of every size.

By Jim Paulson, President

While attending the user conference April 7-9 in Orlando, Florida, I had the pleasure of meeting many Maxwell customers and enjoyed the opportunity to welcome them to our newly extended Viewpoint family. It was inspiring to experience the shared focus on technology innovation and an honest exchange of ideas as we set forth to create a valuable experience for our entire customer base. Now that I've been back in the office for a month since the conference, I'd like to provide an update on how the integration is going and what exciting opportunities Viewpoint has in store for our customers.

For starters, I want to emphasize our continued commitment to the Maxwell customer base. Having evaluated the current Maxwell products, we intend to support American Contractor, Management Suite, StreetSmarts, and Colonial products for 3-5 years, during which time we encourage migration to ProContractor by Viewpoint or Viewpoint V6 Software – two contemporary solutions that offer long life for development and support. These two ERP platforms are specifically designed for contractors of specific sizes – ProContactor for small to midsized customers and V6 for larger contractors. Great news is that the robust estimating solutions you may be familiar with (formerly Estimation and ProContractor estimating) will be a vibrant part of both solutions moving forward. This should be particularly exciting to our current V6 users who have been looking for an estimating component to add to their comprehensive software platform. In keeping our customers a part of the collaborative process, we will solicit your feedback as we continue to more tightly integrate estimating and related workflows.

Additionally, I'm please to say that both organizations have come together culturally and technologically and have already been able to build on our shared capabilities and expertise across all departments. Our team will continue to seek your input to ensure we best serve the interests of our customers and of the broader construction industry. Moving forward, we will uphold our investment in Viewpoint's ability to advance technology and offer contemporary construction software solutions for your productivity and profit.

Viewpoint is better prepared to meet the needs of a wider range of customers with more innovative products than ever before. I'm encouraged and energized by the product portfolio we have assembled and the solutions we are able to offer contractors of all sizes and I promise you this - Viewpoint is a partner that is focused on your current and future needs with the support you expect to ensure your software investment delivers unparalleled efficiencies and opportunities for your business. I look forward to continuing the conversation.

Customer Quality Corner

By Pam Snodgrass, Manager of Customer Quality

Connect with Viewpoint Users/Customers via Vantage Point!

LinkedIn, Facebook, the annual Viewpoint User Conference…. These are all great ways to connect and collaborate with other Viewpoint software users, but we want to make sure you're aware that Vantage Point offers additional opportunities!

1. **Customer Directory**
   We encourage you to include your company in this list to allow other users/customers to find and connect with you. Users with Full authorization have access to the My Vantage Point > Company Profile section of Vantage Point, where they can check the "Include In Directory" box – see first screen-shot. Then all users can visit Resources > Customer Directory to view information about customers who have agreed to be listed – see second screen-shot.

Resources

Customer Directory

See below for the customer directory featuring the contact information for staying in touch with other Viewpoint customers. Use the filters to narrow your search, and then click on a selected company name to access their business overview.

To have your company included in this directory, access the My Vantage Point - Customer Profile section and check the "Include In Directory" box. Note that Customer Profile is only accessible by users who have been fully authorized (FULL) by their company.

Filters

Country	State/Province/Territory	Market Segment
All ▼	All ▼	Specialty & Sub ▼

ABC-Electrical Contractors
Des Moines, Iowa United States
http://www.abcelectric.com
(515) 270-6400
Specialty & Sub

AES Electrical, Inc.
Laurel, Maryland United States
http://www.aeselectrical.com/
(301) 595-0665
Specialty & Sub

Ascher Brothers Co., Inc.   Painting and Decorating Contractor
Chicago, Illinois United States
http://www.ascherbrothers.com
(773) 588-0001
Specialty & Sub

2. **Forums**
   The product-specific forums on Vantage Point is another great way to collaborate with other users. See Learning & Support > Forums for an overview; then select the specific product forum (Construction Imaging, Mobile Field Manager and/or Viewpoint V6) to start sharing and learning. Note that forum access is limited to the products your company currently owns.

VANTAGE POINT

| Home | Learning & Support | Services | Viewpoint Products | Partners | Resources | My Vantage Point | Contact Us |

Learning & Support

Viewpoint V6 Software Forum

The Forum allows you to network with other users, share ideas and best practices, and help each user get the most out of the Viewpoint V6 software.

You may subscribe to a forum thread by clicking the "Email me when this forum has a new thread" checkbox on the lower-right of each desired forum.

* Please note that although Viewpoint staff may review and comment on Forum posts from time to time, it is not officially monitored. Be sure to use visit the Contact Us section of Vantage Point or call 971-255-4801 if Viewpoint follow-up is needed.

| My Settings | My Posts | My Threads | Search | Home | All Forums |

▶ Home

View latest 6 | 12 | 24 | 48 | hours | View unread threads

FORUMS	THREADS	POSTS	LAST POST
Aggregated			
All Forums An aggregated view of all forum threads.	0	0	Standard Mainte... Today @ 5:04 PM by Ryan Rhodes
General Categories			
IT Topics This forum is for discussions regarding IT topics such as security, user customization, backups, etc.	62	186	Re: Updating: t... 5/2/2014 8:20 PM by Geoff Haffner
Miscellaneous For topics that don't fit other categories.	26	58	Re: 6.8.1 "Job ... 5/7/2014 5:05 PM by Scott Alvey
3rd Party Topics This forum is for discussions regarding third party tools such as FRx, POS, ADP, HCSS, MCX2, Libra, Data-Max, etc.	20	45	Re: FRX versus ... 5/12/2014 4:22 PM by Lisa Kahler
Shared Files and Reports This is an an area for Viewpoint users to share reports or other files.	3	6	NY State Schedu... 2/7/2014 2:16 PM by Vpassist Vpassist

We are working on some additional customer collaboration opportunities that we look forward to sharing with you in the coming months!

Return to index

Jump start your financial reporting and budgeting process

Jump start your financial reporting and budgeting process with our best-in-class training. Classes are taught by industry experienced trainers and delivered over the web so you don't have to travel! Which class is right for you?

Financial Planner
Financial Planner provides easy-to-use tools for your detailed budgeting, planning and forecasting needs. In addition, Financial Planner provides dynamic data entry views/templates and provides secure multi-level workflows. This course walks you through setting up a budget from start to finish, creating a multi-level workflow, building a forecast, forming security at a group or use level, and numerous other helpful budgeting scenarios.

Financial Reporter
Financial Reporter provides easy-to-use tools for all your financial reporting needs. Whether you are creating a single company Balance Sheet or a multi-company consolidating Income Statement, Financial Reporter is the one tool you will need. This course walks you through setting up numerous financial statements including Balance Sheet, Income Statement, Multi-Company Consolidations/Eliminations, Cash Flow statements, Year over Year comparisons, and many more. You will learn to create multi-faceted security groups, customize organizational hierarchical structures, automate scheduling and report distribution, and much more.

Click below to sign up for the next engaging class opportunity! Class size is limited to enable one on one interaction to maximize your learning experience.

May Support Update

By Bill Berendes, Director of Customer Support

Support – Our Team Is Growing

As our base of customers continues to expand (and now that we are past our peak of case volume for the year) we have begun recruiting new team members for both our Application Support Team, and our Technical Support Team. We are actively recruiting for both our Charlotte office, as well as Portland. We are looking forward to expanding our ranks; the additional resources will allow us to reduce our Response Time, as well as allow our existing team members time to participate in advanced, 'deep-dive' training.

I will update you in the coming months on who, and where we have added to the team.

At your service,

Bill Berendes

bill.berendes@viewpointcs.com

Support Escalation Liaison – Geoff Haffner

As you read in our April edition of the V. Newsletter my role at Viewpoint has changed to Support Escalation Liaison. I'm very excited about my new position. Many of the responsibilities are not new to me, but being focused exclusively on building satisfaction for customers is truly my passion.

In my new role I will be interfacing daily with Product Management, Development, QA, Support and Professional Services to ensure our efforts are improving the customer experience. One of my primary roles is to be the main point of contact for customer facing teams and customers for escalating issues to Development. I will be working closely with our Sustaining Development team to triage and bring issues to resolution.

In addition, I will be taking the lead on our current Issue Visibility Initiative to ensure we are transparent with the issues we are aware of and publish them on our Vantage Point website. Below is my contact information, feel free to reach out to me if I can be of assistance.

Geoff Haffner
(971) 255-4693 direct
geoff.haffner@viewpointcs.com

Countdown to Microsoft Product Support Sunset – 5 months remaining

Per our previous e-mail communication in June of 2013 we would like to remind you the following Microsoft Products will no longer be supported and may become incompatible with the Viewpoint product lines with the September 2014 releases.

- Windows 2003
- Windows XP
- Office 2003
- SQL 2005

Microsoft Product Support Sunset Frequently Asked Questions

What does this mean?
This means that you must upgrade your servers/desktops to newer versions of these products before you install the September 2014 release.

Why is Viewpoint discontinuing support on these products?
This is a normal process. As our vendors no longer support certain releases, we in turn are not able to continue to debug and test on the release of their products. Does this mean full application functionality will not be guaranteed if we remain on any of these platforms beyond the date? Yes. While full application functionality may continue, Viewpoint cannot guarantee this.

Do I have to install the September 2014 release as soon as it is available?
No, the September 2014 release will not be required to install the December 2014 Regulatory release for year-end processing – only the March 2014 update must be installed. Although, you would be forgoing the benefits and functionality of the September 2014 release, you may postpone installation for a few months and into 2015.

Note: The June 2015 Regulatory release will require installing either the September 2014 or March 2015 release. The December 2015 Regulatory release will require installing either the March 2015 or September 2015 release.

What conversion support can Viewpoint provide?
If you need assistance in upgrading MS SQL Server from SQL 2005 or MS Windows 2003 Professional, the Viewpoint Professional Services offers billable services to assist you. To request Professional Services simply place a support request with Viewpoint.

What if I have additional questions?
Please send a support request with any questions you may have regarding the sunset of these products.

Knowledge Base Tip

At Viewpoint our Knowledge Base on Vantage Point is constantly growing and evolving. When you log into Vantage Point and go to the Knowledge Base section you will notice a slight change to the lead in. We have embedded a link, that when clicked upon, takes you to the following Knowledge Base article.

Knowledge Base

If you have a question regarding the capabilities of your Viewpoint software, the Knowledge Base is a great place to start. Here you will find a growing resource of frequently asked questions about how to accomplish specific tasks. Please visit the Viewpoint Learning Center for general product training.

You may browse/search entries by category and keywords.

Please reference this knowledge base article for guidance on advanced search techniques.

Documents may be viewed online or downloaded for offline storage. Please install Adobe Acrobat Reader to view the embedded documents.

How do I get better results when searching Knowledge Base articles?

As of April 2014, the keyword search was improved significantly by making a few key changes to the way the search behaves. However, searching by category is another option that you may find helpful.

Using category filters is another way to search for Knowledge Base articles. The example below illustrates an easy way to search for articles that will help with the 1099 process.

When you first open the Knowledge Base search page it looks like this:

Knowledge Base

If you have a question regarding the capabilities of your Viewpoint software, the Knowledge Base is a great place to start. Here you will find a growing resource of frequently asked questions about how to accomplish specific tasks. Please visit the Viewpoint Learning Center for general product training.

You may browse/search entries by category and keywords. Documents may be viewed online or downloaded for offline storage. Please install Adobe Acrobat Reader to view the embedded documents.

1. First uncheck the "All Categories" box and click on the '+' box; you will get a list that looks similar to this:

2. Click the '+' box next to the product you want to search; you will get a list of all the modules. Any module with a '+' box has subcategories
3. Click the '+' box next to module you want to search:

☐ ▣ Viewpoint V6
    ☐ ▣ Accounts Payable
      ☐ Accounts Receivable
      ☐ All Modules
      ☐ Cash Management
      ☐ Cloud
      ☐ Crystal Reports
      ☐ Document Management
    ☐ ▣ Equipment
      ☐ Financial Reporting
      ☐ General Ledger
      ☐ Headquarters
      ☐ Human Resources
      ☐ Imports
      ☐ Inventory
    ☐ ▣ Job Billing
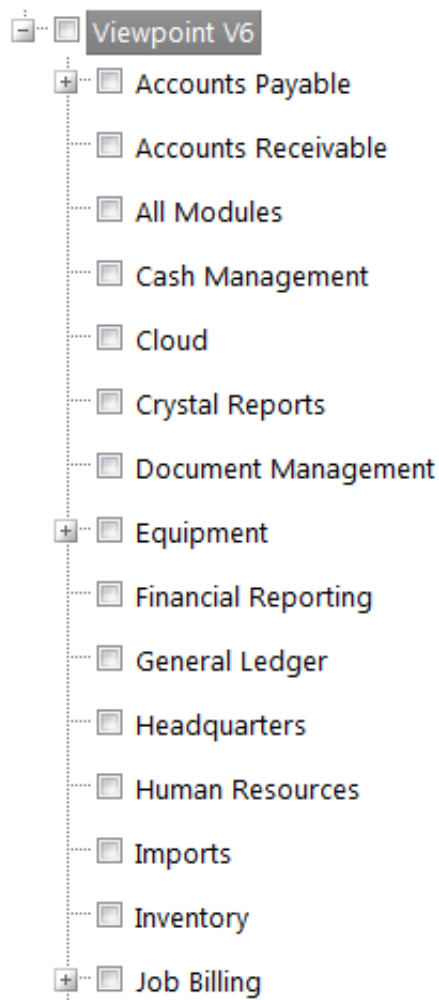
The list will look similar to this:

☐ Viewpoint V6
    ☐ Accounts Payable
      ☐ 1099's
      ☐ Hold / Release
      ☐ Payments
      ☐ Transaction Entry
      ☐ Unapproved Processes
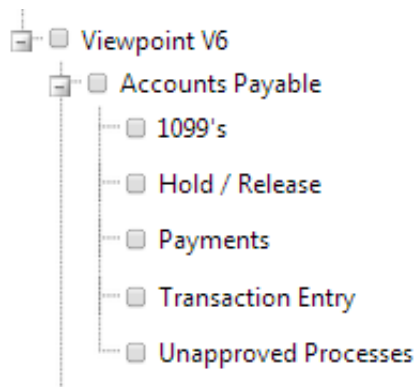
4. Check your selection and click on the submit button at the top of the page (with or without keywords). If you wish to refine your results, you can use keywords in combination with the category search.

Welcome New VIPs!

We're pleased to introduce new Viewpoint Industry Professionals (VIP) into our program.

What is our VIP program? The VIP program focuses on developing meaningful, strategic relationships with CPA's, surety's, insurance brokers, consultants and other industry professionals that are highly influential in the construction marketplace. Providing access to the Viewpoint Construction Software community, this program allows members to better serve their clients (you!) with the latest product information, industry trends and collaborative knowledge sharing.

VIEWPOINT
INDUSTRY
PROFESSIONALS

Please join us in welcoming our new VIPs:

- Geffen, Mesher & Company, PC – CPA firm in Oregon
- Averett Warmus Durkee, – CPA firm in Florida

Click here for brief bios of all our partners.

Save Time and Money -- Streamline your Procure-to-Pay and Expense Management Processes

By Eric Newton, SVP, Vertical Markets, Comdata Inc.

In an effort to simplify the purchasing and payment process, improve employee satisfaction, and reduce paperwork, more and more companies are streamlining their procure-to-pay process. In a RPMG Purchasing Card Benchmarking Report, employers reported a 70% reduction in procurement time and an average savings of $78 per transaction with purchasing cards.*

Comdata offers expense control tools that integrate card activity across various categories of commercial cards, giving business owners a clear overview of company expenses and spending patterns. The largest category of these commercial cards are Purchasing cards, which are used by 64% of companies** and growing annually by 20%.***

As the provider to many of the ENR Top 400 customers and over 1,000 construction customers, Comdata offers real-time control and management of purchases made by employees on behalf of your business. By utilizing the real-time expense management tools and the detailed transaction reporting Comdata's Multi-Card MasterCard© offers, companies can streamline their procure-to pay process while improving accuracy, and enabling tighter controls to help prevent abuse.

Another way Comdata is helping with organizing, routing, and approving purchases made is with Comdata's exclusive expense management system (CEMS) for the construction industry.

This expense management system allows cardholders to quickly and easily allocate card purchases to expense categories such as accounting, jobs, equipment, and business units. Easily accessible via web and mobile application platforms, CEMS integrates fully with Viewpoint software while providing a simple, streamlined interface for business owners to access transaction data, create records for cash expenses, and perform expense coding.

Companies can save time and money when they move to a more streamlined procure-to-pay process. By utilizing Comdata's Multi-Card MasterCard© you can simplify and automate your AP Department, create value through revenue generation, all while saving you time and money.

Contact a Comdata consultant to learn how you can save time and money, and earn monthly cash rebates – and integrate with your Viewpoint V6 Software. Call 1.888.820.3835 today to receive a no obligation consultation so we may explore and evaluate your spending patterns.

Purchasing Card Benchmark Survey, RPMG Research Corporation
**"The Value of Purchasing Cards, Utilizing P-Cards as a Strategic Form of Payment." PayStream Advisors, Inc.*
***(CAG Growth Rate) from 2010 to 2012 Misasi, Michael. "U.S. Commercial Card Market Update." Mercator Advisory Group, Inc.*

A Webinar Frenzy! Don't Miss Out on These Educational Opportunities

Following is an extensive webinar series created to assist you in further utilization of your Viewpoint solutions and increase awareness of related solutions that may support you in achieving the strategic goals of your organization.

- **V6 Security**

- **Disaster Recovery**
- **The New Resource Management Module**
- **Construction Imaging by Viewpoint - Enterprise Content Management**
- **V6 Utilization Webinars**
- **Comdata's Innovative Payment Application Solution**

Support Webinar Series to Answer your V6 Security Questions

PR & HR Datatype Security: Setup and Implementation

Hosted by Viewpoint Application Support Specialist, Karin Garrett, this informative webinar will teach you how to setup data type security to restrict access to confidential employee information. You'll see first-hand how setting up security can impact other Viewpoint modules such as Human Resources, Job Cost, Equipment Management and Cash Management. Additionally, we'll show you how to setup data security for securing confidential aspects of Human Resources that are not fully covered by the employee security and we'll discuss options for obtaining limited access to secured data.

Date and Time: June 11, 2014, 10:30 – 11:30 AM PT / 1:30-2:30 PM ET

Register Now!

User/Form/Report/Attachment Type Security: Overview, Setup and Implementation

Hosted by Viewpoint Application Support Specialist, Dona Manning, this webinar will help you understand how security works in Viewpoint V6 Software, including the security hierarchy and levels. You'll learn how to setup security groups by roles and type, assign users and provide certain groups with access to forms, reports and attachment types. We'll also cover some tips for cleaning up existing security or moving from individual security to group level security to minimize maintenance and close any security gaps.

Date and Time: July 23, 2014, 10:30-11:30 AM PT / 1:30-2:30 PM ET

Register Now!

Disaster Recovery: A Viewpoint contractor shares his story

Disaster Recovery

You won't want to miss this webinar. Hear the harrowing story of prominent Nashville, TN electrical contractor, Stansell Electric, a business that nearly lost everything as a massive flood filled their headquarters with rising water. Owner, David Stansell sits down with Viewpoint Sales Engineer, Matt Mosley in a "fireside chat" format to share his story of loss, recovery and lessons learned after suffering over 3 million dollars in damage to his family business.

Experience a first-hand account of the realities of not having a disaster recovery solution in place when the unthinkable happens and Stansell's plan moving forward.

Presenters: David Stansell, President, Stansell Electric and Matt Mosley, Sales Engineer, Viewpoint
Date and Time: June 18th, 11:00 – 11:45 A.M. PT / 2:00 – 2:45 P.M. ET

Register Now!

Learn how Viewpoint's new Resource Management can help you manage the scheduling of your employees and

equipment

Resource Management Release Highlights Webinar

We know that managing resources across projects can be a challenge for many contractors. Without insight into smart planning and scheduling of resources, projects can fall way behind schedule quickly.

This first release of Resource Management by Viewpoint is a step forward in providing an integrated resource management solution that offers real-time visibility into labor and equipment needed across all projects – ensuring your projects are resourced appropriately in order to complete on schedule.

In this informative webinar, Viewpoint's Scott Hegrenes, Product Manager, will go over the following highlights of the product release and the integration with Viewpoint V6 Software:

- How to classify resources such as employees and equipment requirements at the project level.
- Learn about the setup and administration of Resource Management.
- Resource Locater – Quickly locate resources, view availability as needed and assign to projects.
- Web Tool - Access a project schedule view over the web in a disconnected environment.

Date and Time: May 28, 2014, 10:30 A.M. – 11:15 A.M. PT / 1:30 P.M. – 2:15 P.M. ET

Construction Imaging Series of Webinars for V6 Customers

As a Viewpoint V6 Software customer, join us and learn how Construction Imaging by Viewpoint can be a single repository with automated data capture, electronic smart forms, and workflow for all documents, photos and content across your company. We encourage you to sign up for any or all of these informative webinars which highlight more benefits of the software and how the solution easily integrates with all your data in V6.

Connecting the Field to the Back Office with Electronic Forms

- Learn how to access your electronic forms from anywhere.
- Discover how easy it is to capture data quickly and easily from the source.
- Learn how to automate the workflow to speed up approval and review processes, automatically store data in V6 and in Construction Imaging for accessibility through either user interface.
- Learn how the integration can do the data entry for record creation and storage automatically saving time and improving efficiencies.
- Learn how integrations with back end databases can easily and automatically populate data on the forms through live user lookups.

Date and Time: July 24, 2014, 10:30 A.M. PT / 1:30 P.M. ET

Automate your HR Onboarding Process with V6 and Construction Imaging

- Learn how the HR Electronic Forms package presents configurable pre-designed forms that easily integrate with the V6 and Construction Imaging core system.
- Learn how to automate your workflow around the onboarding processes.
- Automate the workflow to create records in V6 at the determined steps in the workflow process.
- Automatically pre-populate HR forms during the onboarding process and send them out automatically.

Date and Time: August 7, 2014, 10:30 A.M. PT / 1:30 P.M. ET

V6 Webinar Series - We want to make sure you're utilizing all the features, functionality and rich capabilities of V6

Inventory and Material Sales

- Get a general overview of Inventory and Material sales
- Capture information about materials including inventory and materials used to produce a product from raw materials
- Gain superior materials inventory management and sales data at your fingertips

Date and Time: May 21, 2014, 10:00 A.M. PT / 1:00 P.M. ET

Register Now! ▶

Job Cost Projections

- Learn about the overall capabilities of Job Cost Projections and the new March Spring Release enhancements

Date and Time: June 25, 2014, 10:00 A.M. PT / 1:00 P.M. ET

Register Now! ▶

Business Intelligence

- Learn how to easily view key business metrics in a dashboard or as a report helping to reduce profit fade
- Discover why it's so important for your organization and how it provides a competitive edge
- Learn how to make it work for you

Date and Time: September 10, 2014, 10:00 A.M. PT / 1:00 P.M. ET

Register Now! ▶

Project Management Work Centers

- See how this centralized hub empowers PMs to view, analyze and make time-critical decisions
- Learn how to customize Work Centers and inquiries
- Get information about the new functionalities of Project Management in the September release
- Learn how to create custom document templates and share documents for distribution

Date and Time: November 20, 2014, 10:00 A.M. PT / 1:00 P.M. ET

Register Now! ▶

Comdata - Innovative payment application solutions that integrate with Viewpoint V6 Software.

Streamlining Payments in the Construction Industry

Viewpoint customer Summit Materials, a Colorado based aggregate producer, needed a better way to address

spending challenges and expense control issues. It was important that they find an automated payment process that integrated with their Viewpoint V6 Software ERP system to fully streamline the procure-to-pay process while completing payment transactions quickly. Comdata and Viewpoint have partnered together to integrate Comdata's one-card platform into Viewpoints V6 Software.

Comdata understands that traditional construction project accounting typically results in a lag time of 30 to 40 days before expenses surface. That's why they provide real-time access to data, empowering immediate decisions that can drive cost management. In this webinar, you will see how an integrated payments solution provides the flexibility to meet a broad set of objectives, while simplifying the complex expense management processes.

Learn about flexible alternatives to paper checks designed to turn your accounts payable department into a revenue generator and discover how to achieve 100% electronic payroll - lowering operational costs and streamlining business processes.

Presenters: Tony Keenan, Sr. Vice-President of Finance & Operations Financial Officer, Summit Materials, and Eric Newton, Comdata Senior VP
Date and Time: May 29, 2014, 11:00 A.M. PT / 2:00 P.M. ET

We look forward to you registering for these beneficial webinars.

Return to index

New Hires

Welcome new hires!

Jeff Nyberg – Accounts Receivable Accountant
Tim Horton – Development Operations (DevOps) Engineer
Adam Snyder – Software Consultant
Rick Shafer – Software Consultant
Erika Langhauser – Scrum Master
Hajime Nagashima – Software Development Engineer
Josh Burley – QA Analyst
Bryan Zeigler – Sales Representative
Shane Kirkpatrick – Sales Representative
Brian Helm – Software Development Engineer
Alan Edwards – System Administrator
Stephen McMenzie – Application Support Specialist
Paul Fairley – Software Development Engineer
Richard Munn – Software Development Engineer

Return to index

Viewpoint Business Forms

Our exclusive forms partner, Viewpoint Business Forms, serves our customers with the highest level of customer satisfaction, competitive pricing and excellent quality.

Viewpoint Business Forms offer a complete line of forms and continuous or laser checks printed at one of their 5 manufacturing locations around the U.S. for reduced freight available to North American customers. Each format has been carefully designed and is exclusively guaranteed to perfectly align with Viewpoint V6 Software.

Click here for more information or call customer service toll free at 800.825.8649.

Return to index

VIEWPOINT