

## FEATURES / BENEFITS

### Homepage

- Shows key dates and new correspondence
- Document telephone conversations
- Add hours and expenses to timesheet
- Send e-mail messages
- Create and review personal task list
- Search for contacts or projects
- Navigate the system
- Create and update to-do lists

### Scheduling

- View daily, weekly, and monthly schedules for an individual or the entire company
- Schedule recurring appointments
- Store personal and corporate events, deadlines, and appointments
- E-invite contacts to scheduled appointments
- Automatically receive updates to revised project schedules
- Identify meeting locations with digital mapping
- Print itinerary of daily events with locations

### Contacts

- Search for contacts by name, location or type
- Track contact locations and contact information
- Identify contacts' staff and projects
- Create personal contact rolodex for global and personal contacts
- Store personal-information on contacts

### Correspondence

- Retrieve documentation by type, date, keyword, contact and project
- Record incoming e-mail, transmittal, fax, memo, and phone calls
- Create outgoing e-mail, transmittal, fax, and memos
- Create project document reproduction orders
- Store correspondence by project or by personal folder.

### Communication

- Wireless messaging between the office and the field
- Receive e-mail updates to mobile devices when not logged into the system

### Projects

- Search for projects by name, reference number, location, or type
- Create new project files
- Access detailed project information, including location and contact information
- Identify project staff, contacts, and their roles
- Track project schedules and key dates
- Manage project documentation such as correspondence and letters of assurance

### Time Sheets

- Apply hours to appropriate contract and segment
- View in real time how hours impact project hours budget
- Track project and non-project activities
- Review hours and expenses for day, week, or month
- Roll scheduled events into your timesheet
- Record project expenses for reimbursement

### Project Leadership

- Get real time information on project progress
- Receive automatic alerts to changes in scope of work
- View real time snapshot of hours applied to date
- Receive alerts for pending invoices

### Contract Management

- Access contract information, including scope of work, phases, schedules
- Generate time and financial budgets
- "At-A-Glance" project status summary
- Time and expense summaries
- Generate client updates and statement of impact
- Document changes and approvals to scope of work
- Issue contract memos to client for notice, signature, or approval

### Document Control

- Track specific changes to contacts, projects and contracts
- Maintain a record of all deleted documents
- Maintain log of all communication

### Employee Information

- Track employee project information
- Maintain employee personal information
- Track holidays, sick days, and human resources documentation
- Manage employee access to secure information

### Administration

- Reconcile courier and document orders
- Get real time project information
- Review correspondence and communication logs
- Create reports on hours, invoicing, and contract status
- Generate reports in PDF format



### Invoices

- Prepare invoices based on fees or hours
- Batch invoicing of selected projects
- Modify hourly rates and billing details
- Print invoices and attachments in PDF format

### Web-Based Access

- Access to information 24 hours a day, 7 days a week
- Configured to your unique needs
- Retrieve data via any internet ready handheld device
- Receive instant updates via text messaging
- Secure data access and storage

### Support

Acteo is monitored 24/7. Our support staff is notified immediately when you have encountered an error in the system, or you send us an issue. Upon receiving an error or issue our support staff will handle the request and provide feedback as appropriate. All system users will have access to our support staff for technical assistance via the web; but, in the case where more direct assistance is required there is an extended support package available.