

Recommendations

Architectural Bookkeeping Apps Evaluation



After investigating over 40 applications, reviewing over 30 applications, and scoring over 20 applications, I learned that hardly any of the apps work that great for architects. My recommendations are BIGTIME and Monograph. For very small firms, I think Harvest is a workable solution, but not ideal in several ways. And for the tech savvy DIY type there is Avaza.

Recommendation #1

BIGTIME



Key Features Overview

BIGTIME is a very sophisticated timekeeping app that is top of the line for small firm architects' bookkeeping needs.

What it is

BIGTIME is a project financial management tool that does everything you need very well - project budgeting, timekeeping, reporting on status in real time, and invoices projects in all the ways architects need.

What it isn't

BIGTIME is not accounting software, it does not prepare payroll, it does not prepare business financial reports or taxes.

Setup and Learning Curve

BIGTIME provides assistance in getting setup, but because it is so customizable you may be tweaking its features for several months after you are using it daily. The BIGTIME knowledge base is extensive with step by step descriptions of 'how to'. For users the learning curve does not seem any different than you would encounter when changing your bookkeeping.

Cost

The cost of BIGTIME is its only feature to give pause - at least for 1-3 person firms because the minimum number of users is five. So it makes the cost a bit high.

Options

There are three plans - Express, Pro and Premier. The Express plan is just timekeeping without any type of project financial information and doesn't include invoicing. The Pro plan has everything that is described in this review. The Premier plan has features geared to larger firms of 20 or more people. The recommended plan is the Pro Plan.

Cost Basis

The Cost Basis is per user per month with a minimum of five users for the Express and Pro plans and a minimum of 10 users for the Premier plan.

The cost is paid annually.

The Pro plan is \$30 x 5 user minimum or \$1,800 / year

Cost for up to Five People is \$1,800 per year for the Pro plan

Benefits

The benefits that BIGTIME offers

- Excellent Project Feedback on design budgets
- Robust and Easy Timekeeping
- Multiple fee types per project, including custom billing rates.
- Top Notch Invoicing which may save enough time per month to pay for the app (just one extra hr billed at \$150 = the cost of the app).
- Expense tracking for project expenses, reimbursable expenses, and overhead expenses
- No need for you to use QuickBooks, all your bookkeeping is here

Timekeeping

The timekeeping process is very intuitive and takes as few clicks as any app. There can be five timers set up at once to switch between if you like to work that way. There are weekly and daily views. Submitting time, which is a separate click from entering time, locks the time entries. However, time shows up in reports as soon as entered. The submitting process prevents changes after invoicing or payroll. One click submits. One click also reloads last week's timesheet with blank time amounts.

- Very few clicks
- Saves Timesheet Rows from week to week
- Sub-tasks
- Multiple Timers

Project Financial Management

Phase budgets

By setting your design budget by phase, you can see very clearly how the project is going. BIGTIME also accommodates sub-phases if you prefer to break things down further for monitoring progress. Phases and sub-phases can be copied from one project to another. This makes it easier to set up similarly structured projects.

Hour budgets

You can set hour budgets for phases as well as dollar budgets. Both are used in reports.

Rates

Billing Rates are as robust in BIGTIME as you will want. You can have five billing rates per person. In addition you can set up 'rate cards' to be used by projects. You can also have custom rates for a project. You can have rates tied to type of work instead of the person, and more.

Cost Rates also work well. Cost Rates represent what the person costs the firm - labor rate plus a share of the overhead expenses. They can be

adjusted from time to time independent of billing rates to account for other changes in the firm - change in staff or overhead expenses.

Expenses

The Expenses feature is just short of full accounting - which is a good thing.

Project Expenses - Add any expense to a project to see its impact on fees, say consultants' fees.

Reimbursable Expenses - Reimburse staff for mileage and other expenses and then add those expenses to invoices (if desired) to bill the client.

“Overhead Expenses” - I recommend creating a non-billable project named Office or your firm name. You can add all your overhead expenses to that project. The expense categories can match whatever you or your accountant wants to see. All your data is in one place. There is even a process for uploading credit card charges. There is no need for you to mess with QuickBooks. Get your accountant to show you how to export what they need to do your taxes.

Invoicing

The invoicing feature is a welcome surprise. I have never seen a system that can do exactly what an architect needs in a bookkeeping app (that's not accounting). The big accounting packages (e.g. Deltek) can do this kind of invoicing, but this is better.

Extreme customization

You will be able to get your invoices to show exactly what you want. You may have to compromise aesthetically (if very fussy) but definitely the content and terminology will be what you need.

True percent-complete invoicing

True percent-complete invoicing is really rare. Not only does BIGTIME have percent-complete style invoicing but you can invoice some phases as fixed fee and some by hourly rate. (I recommend that SD and CA be invoiced hourly because you have very little control over these two phases.)

Each Phase can be hourly, fixed or a combination.

Reporting

BIGTIME reporting is robust. Anything you want to focus on can be reported. Reports are customizable and can be “memorized” so that you don’t have to re-customize it every time.

Other Features and Integrations

Mobile Apps

BIGTIME has mobile apps, but they have mediocre reviews. Of course you can login from any laptop browser. The tablet browser is almost usable, but the mobile apps are not.

Online Payments

BIGTIME has their own payment processor so it is tightly integrated.

Permissions

With all your data in BIGTIME you will be concerned about who can see what. You can set up your own permission levels and they are as detailed as any that I have seen. If you have a unique situation, you can create a unique permission level to address it.

Approvals

For bigger firms you might want to turn on an approval process for timesheets and/or expenses.

Integrations

QuickBooks, Google Calendar, iCalendar, Zapier, and others

Bottom Line

BIGTIME is the best app that I reviewed. It is ideal for architects, and has all the tools you need. I would use BIGTIME for timekeeping, project financial data, and tracking ALL expenses. I would connect BIGTIME to my accountant’s QB account (for taxes and financials), subscribe to Gusto or similar for Payroll and that’s it. Firms under 20 (under

10 for certain) cannot afford to distract themselves with QB accounting. Everything you need to know is in BIGTIME (with half the effort). Once you are comfortable with BIGTIME, I predict that the time savings on invoicing and the better data will more than pay for BIGTIME.

Recommendation #2

Monograph



Monograph - Track your projects and revenue with ease.

Key Features Overview

Monograph is made by architects for architects so you would rightly expect it to be a great fit. There are a lot of things to like about Monograph. There is a tendency for Monograph to assume a larger firm size and project size than is the case for most small-firm architects. This doesn't appear to get in the way of using the app.

What it is

Monograph is a project financial management tool that does everything you need very well - it has an excellent project budgeting

process, timekeeping is straightforward, reporting in real time, and invoicing projects in all the ways that architects need.

What it isn't

Monograph is not accounting software, it does not prepare payroll, it does not prepare business financial reports or taxes.

Setup and Learning Curve

Monograph provides a guide to help you get setup. Because architects are the focus of Monograph there isn't tons of customization to do. The Monograph knowledge base is decent with step by step descriptions of 'how to'. For users the learning curve does not seem any different than you would expect to encounter when changing your bookkeeping system.

Cost

The cost of Monograph is on the high end. Unlike BIGTIME there is no minimum number of users. The Cost Basis is \$45 per user per month. There is just one plan. The cost is paid monthly.

Benefits

The benefits that Monograph offers

- Excellent Project Feedback on design budgets
- A very nice project budget planning tool
- Robust and Easy Timekeeping
- More than one fee type per project
- Integrated Invoicing which may allow you to give up your home made system

Timekeeping

The timekeeping process is very intuitive and takes very few clicks. You can use timers if you prefer. There are weekly and daily views. Submitting time, which is a separate click from entering time, locks the time entries. However, time shows up in reports as soon as

entered. The timesheets are locked on a calendar basis which you set. Although the timesheet process assumes that timesheets will be approved, you can give users the right to approve their own timesheets. The next week's timesheet uses the same rows automatically. You simply 'X' out any that you don't want cluttering up your timesheet.

- Very few clicks
- Copies over Timesheet Rows from week to week
- Timers

Project Financial Management

Phase budgets

By setting your design budget by phase, you can see very clearly how the project is going. Monograph has a "Money Gantt" that shows how much of each budgeted phase has been spent.

Phases and team members can be copied from one project to another. This makes it easier to set up similarly structured projects.

Hour budgets

You can set hour budgets for phases as well as dollar budgets. Both are used in reports.

Rates

Billing Rates are unusual in Monograph. You set billing rates by role and assign people to the roles. If you work this way, this will be perfect. I never have, so I would need to turn the roles into peoples' names. When you assign roles to a phase, you have the opportunity to set a custom billing rate for the role. Effectively there are unlimited billing rates, but you might have to manage any increase in billing rates (annual pay increase) on a project by project basis. The billable rate is the only way to charge the cost of time to a project - no charge/cost rates and no labor rates.

Expenses

The Expenses feature is not as robust as I would like. It seems as though Monograph expects you to use another app to deal with expenses.

Project Expenses - Add any expense to a project to see its impact on fees, say consultants' fees. This has to be done through the timesheet which is odd.

Reimbursable Expenses - I wasn't able to verify that reimbursing staff for mileage and other expenses and then adding those expenses to invoices to bill the client is a working feature. If so this is a spreadsheet you will need to use on the side.

“Overhead Expenses” - I recommend creating a non-billable project named Office or your firm name. You can add all your overhead expenses to that project. The expense categories can match whatever you or your accountant wants to see. All your data is in one place. I would want to use this so there is no need to use QuickBooks. Get your accountant to show you how to export what they need to do your taxes.

Invoicing

The invoicing feature is better than most.

You will be able to get your invoices to show what you want in terms of traditional architectural invoices. You may have to compromise aesthetically (if fussy about invoices) but the content and terminology will be what you need.

True percent-complete invoicing

True percent-complete invoicing is really rare. Not only does Monograph have percent-complete style invoicing but you can invoice some phases as fixed fee and some by hourly rate.

Reporting

Monograph reporting is a bit basic but this is made up for by some of the graphical views of your projects that are built in.

Other Features and Integrations

Permissions

You can set up your own permission levels and they are very detailed. You can have a unique set of permissions for every staff member.

Integrations

QuickBooks, and Xero

Bottom Line

Monograph works the way architects work. It focuses on managing your project budgets, but is a bit light when it comes to the other financial aspects of running a firm. The assumption seems to be that you will have some other app for that. But small-firm architects do not have time to manage and integrate multiple apps into their workflow. Still, it does a very good job of what it does do.

Recommendation #3

Harvest



Key Features Overview

Harvest is a general purpose project-based timekeeping app that happens to work fairly well for architects. There are several things that can make Harvest a workable app. Once you think of Harvest's Tasks as Phases it falls together. Tasks can have budgets and billing rates are fairly robust.

What it is

Harvest is a project financial management tool that does most things acceptably, timekeeping is straightforward, reporting in real time, and invoicing hourly projects.

What it isn't

Harvest is not accounting software, it does not prepare payroll, it does not prepare business financial reports or taxes.

Setup and Learning Curve

Harvest provides several guides to help you get setup. Although Harvest isn't specific to architects there aren't too many things that it does differently. The Harvest knowledge base is decent with step by step descriptions of 'how to'. For users the learning curve is not very steep. The Admin will have a bit more to do.

Cost

The cost of Harvest is on the low end. There is no minimum number of users. The Cost Basis is \$12 per user per month. There is just one plan. The cost can be paid monthly or yearly, which is 10% less expensive.

Benefits

The benefits that Harvest offers

- Feedback on design budgets
- Easy Timekeeping
- Mobile apps that work quite well
- Integrated Invoicing for hourly projects

Timekeeping

The timekeeping process is very intuitive and takes just a few clicks. You can use timers in the day view. There are weekly and daily views. Time shows up in reports as soon as entered. The timesheets are locked when invoiced or by the Admin. The next week's timesheet uses the same rows automatically, but only in the weekly view. You simply 'X' out any that you don't want cluttering up your timesheet.

- Not too many clicks
- Copies over Timesheet Rows from week to week
- Mobile app
- Timers

Project Financial Management

Phase budgets

By setting your design budget by task (phase), you can see your percent complete at any time. A click on a project name brings much more detail into view. Phases and team members can be copied from one project to another. This makes it easier to set up similarly structured projects.

Hour budgets

You can set hour budgets for phases if you prefer. But you have to choose - hour budgets or dollar budgets.

Rates

Billing Rates are fairly robust in Harvest. You set billing rates by person, but you can override them on a project. Effectively there are unlimited billing rates, but if you use custom rates on projects there is no way to globally increase rates for, say, an annual pay raise. The billable rate is used to show the state of the budget, but there is also a 'cost' rate that is charged to the project. You could use the cost rate to equal the labor rate or a rate that includes overhead.

Expenses

The Expenses feature is not as robust as I would like. It seems as though Harvest hasn't given enough thought to how expenses affect project-based timekeeping.

Project Expenses - You can only have project expenses affect the fee when you use an overall project budget instead of budgeting phase by phase. Since phase by phase is generally more helpful, you will have to set phase budgets that add up to the net fee. This has an impact on fixed fee invoicing in Harvest (see Invoicing).

Reimbursable Expenses - Users can enter expenses they incur and indicate if they are billable or not. Billable expenses can be added to invoices, but there isn't a built-in way of adding a markup. You can set up 'in-house' expense charges for plots, printing, etc. With a bit of ingenuity you can probably get Harvest to do what you want.

“Overhead Expenses” - I recommend creating a non-billable project named 'Office' or 'Your Firm Name'. You can add all your overhead expenses to that project. You can create expense categories that can match whatever you or your accountant wants to see. All your data is in one place. I would want to use this so there is no need to use QuickBooks. Get your accountant to show you how to export what they need to do your taxes.

Invoicing

The invoicing feature is OK for hourly projects, but you will struggle to use the fixed fee invoice. If you have a traditional fixed fee, basic services contract, Harvest will not be able to help too much. You will probably need to manage this type of fee outside Harvest. First, it is not designed for percent-complete invoicing, second the terminology has to be changed when switching between hourly and fixed fee invoices, and there is the net fee issue that means line items have to be edited.

Reporting

Harvest reporting is a basic but cover most of what you would need. The presentation of the data in the app is quite detailed.

Other Features and Integrations

Permissions

You can set up permission levels but they are basic. There are three different levels of permissions: Regular User, Project Manager, and Administrator.

Integrations

QuickBooks Online, Xero, Basecamp, Trello, and Slack.

Bottom Line

Harvest works similar to the way architects work. It focuses on managing budgets, but you will have to work to get it to suit your needs. Given the low cost this might be a tradeoff that appeals to 1-3 person firms. However, I recommend BIGTIME as soon as you can swing it.

Recommendation #4

Avaza



Key Features Overview

Avaza is another general purpose project-based timekeeping app. It can work fairly well for architects. But there is a catch or two. First, the project structure is odd; you will need time to figure out how you will make it work for you. Second, the timekeeping process is a bit more time consuming than need be. Although you can copy last week's timesheet rows, you get the hours as well - making it useless. Third, there is a significant DIY aspect to getting it set up. I think this makes it ideal for a firm that doesn't plan to grow, because you will have significant time invested to make it work for you. Why would you

consider all this? Because you like fooling around with apps and the cost is nearly free.

What it is

Avaza is like the others - a project financial management tool that does most things acceptably, timekeeping is simple to grasp, reporting is in real time, and invoicing is amazingly robust.

What it isn't

Avaza is not accounting software, it does not prepare payroll, it does not prepare business financial reports or taxes.

Setup and Learning Curve

Avaza provides a guide to help you get each feature setup. The overview above makes it clear this is a bit more work than the other recommendations.

Cost

The cost of Avaza is its most attractive feature. There are four plans that vary by eight factors: customers (clients), timesheet users, admins, resource schedulers, chat users, projects, invoices and storage.

The Plans

CRITERIA	FREE	\$9.95	\$19.95	\$39.95
CLIENTS	10	Unlimited	Unlimited	Unlimited
USERS	1	2	5	10
ADMINS	1	1	2	5
SCHEDULERS	1	1	1	1
CHAT USERS	5	5	5	5
PROJECTS	5 Active	20 Active	50 Active	Unlimited
INVOICES/MO.	5	50	100	Unlimited
STORAGE	100 MB	10 GB	20 GB	30 GB

You can add more Users, Schedulers, Chat Users and Storage to the paid plans. The pricing structure gives you an idea of the level of complexity Avaza is prepared to work with.

Benefits

The benefits that Avaza offers

- Low cost
- Feedback on design budgets
- Timekeeping
- Mobile apps
- Robust Invoicing but DIY percentage complete style
- More features (except BIGTIME)

Timekeeping

The timekeeping process is simple but takes a extra few clicks. You can use timers from anywhere. There are weekly and daily views. Time shows up in reports as soon as entered. The timesheets can be locked.

- Not too many clicks
- Can force use of phase
- Mobile app
- Timers
- Can use approvals and locking

Project Financial Management

Phase budgets

By setting your design budget by task (phase), you can see your status by using saved report. Phases and team members can be copied from one project to another. This makes it easier to set up similarly structured projects.

Hour budgets

You can set hour budgets for phases.

Rates

Billing Rates are fairly robust in Avaza, but a bit different. You set billing rates by person, but you can override them on a project or a timesheet category. Effectively there are unlimited billing rates, but you will need to understand the way they are used. The billable rate is used to show the state of the budget, but there is also a 'cost' rate that is charged to the project. You could use the cost rate to equal the labor rate or a rate that includes overhead.

Expenses

The Expenses feature is nearly as robust as I would like.

Project Expenses - You can add expenses and assign them to a project as you would expect.

Reimbursable Expenses - Users can enter expenses they incur and indicate if they are reimbursable and/or billable. Billable expenses can be added to invoices with a markup. You can set up 'in-house' expense charges for plots, printing, etc.

"Overhead Expenses" - I recommend creating a non-billable project named 'Office' or 'Your Firm Name'. You can add all your overhead expenses to that project. You can create expense categories that can match whatever you or your accountant wants to see. All your data is in one place. I would want to use this so there is no need to use QuickBooks. Get your accountant to show you how to export what they need to do your taxes.

Invoicing

The invoicing feature is great for hourly projects, and with a little tweaking it isn't bad for fixed fee projects. If you have a traditional fixed fee, basic services contract, Avaza can prepare an invoice using a decimal for the amount complete. It is not true percent-complete

invoicing so you will need to manage the part of this process outside of Avaza. However the content of the invoice is completely customizable.

Reporting

Avaza reporting is a basic but cover most of what you would need. The presentation of the data in the app is quite detailed.

Other Features and Integrations

Permissions

You can set up permission levels but they are basic. There are three different levels of permissions: Regular User, Project Manager, and Administrator.

Integrations

QuickBooks Online, Xero, Basecamp, Trello, and Slack.

Bottom Line

Avaza works similar to the way architects work. It focuses on managing budgets, but you will have to work to get it to suit your needs. Given the low cost this might be a tradeoff that appeals to 1-3 person firms. However, I recommend BIGTIME as soon as you can swing it.