

Technical Services

Opportunities for Viewpoint Vista Custom Reports and Vista, HR Management, Financial Controls and Field Management Software Customizations



Vista Software Customizations

- » Vista company copies and company deletes
- » Code format changes
- » Check number reset
- » Custom WF notifiers, approvals
- » Custom Work Center queries
- » Custom forms and UD fields
- » Validations and lookups for standard fields and UD fields
- » Custom IM Import templates
- » Custom payroll routines
- » Attachment extractions/migrations
- » Custom Utilities/processes
- » Third-party integrations

Viewpoint HR Management Software Customizations

- » Timecard safety net
- » HR Benefits Life Rate Table customization
- » PTO/Leave Request automation
- » Custom lookups
- » Custom onboarding task fields to Vista

Viewpoint Financial Controls and Viewpoint Field Management Software Customizations

- » Custom SQL Choice overrides
- » Custom SSRS reports

Vista Report Services

- » MICR font check layout for blank check stock or custom check setup for preprinted forms
- » Job Billing AIA document
- » Job Billing T&M Invoice
- » Job Billing Progress Invoice
- » A/R Invoice
- » SM Invoice
- » SM Agreement Invoice
- » MS Invoice
- » 401k exports for providers
- » Employee benefit exports for providers
- » Positive Pay report specific to each bank
- » SM Quote logos and addresses
- » Bank Statement Import files to clear

To find out more about these and other customization services, please contact your implementation team or submit a request on the Viewpoint Customer Portal.



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