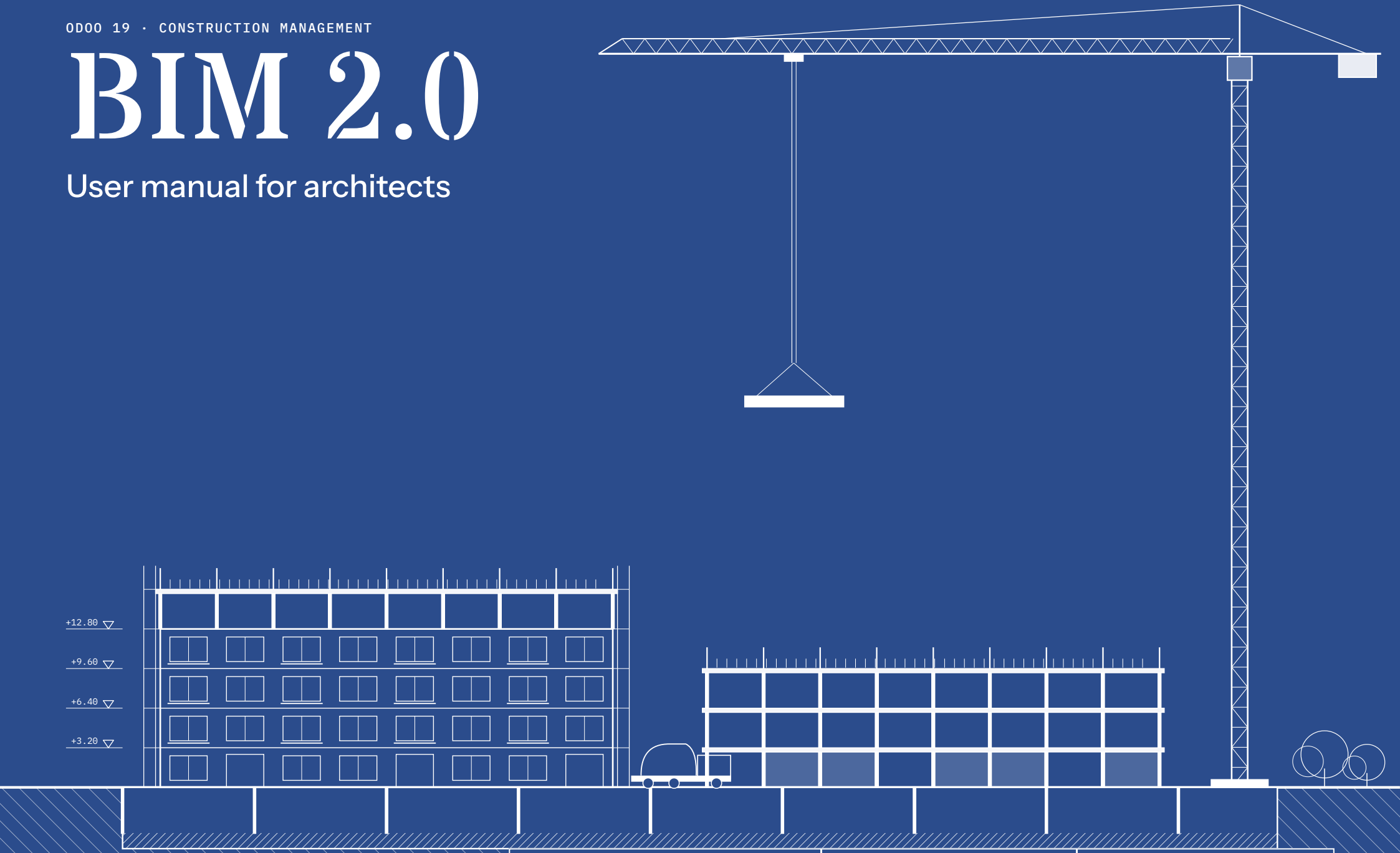
ODOO 19 · CONSTRUCTION MANAGEMENT

BIM 2.0

User manual for architects



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PRODUCT
www.bim20.com
October 2026

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00 How to read this manual

Who it is for

Architects, quantity surveyors and site managers who use **BIM 2.0** on Odoo 19 to run their projects, from the first estimate to the last certification. You do not need any IT or accounting background.

How it is organised

The order follows the life of a project. Chapter 1 sets out the budgeting concepts. The rest walks through the software the way the work happens: create the project, budget it, plan it, certify it and control its cost.

Conventions

- **This style** marks names you see on screen: buttons, menus and tabs.
- Menu paths use arrows: **Home › Projects › Budgets**.
- Numbers on a screenshot refer to the list next to it.

SITE NOTE
Practical tips and shortcuts that save time day to day.

WARNING
Something that gives a wrong result, with no warning, if you overlook it.

ON-SCREEN LABELS
A few labels in the interface appear in Spanish even with the English language active. This manual quotes them exactly as they appear on screen.

The sample project

Every screenshot comes from the software running a sample project, so the figures in one chapter match those in the next.

DWELLINGS	FLOOR AREA	DURATION	CERTIFIED
24	5,200 m²	18 months	45.3%

ITEM	VALUE
Project	Mirador del Turia Residences · PRJ00001
Developer	Turia Demo Developments Ltd
Budget	PSU00001 · €3,021,095.26
Structure	8 chapters, 28 items, 142 concepts
Calendar	18 monthly stages, March 2026 to August 2027
Certified	7 stages · €1,367,754.52
Actual cost	€1,296,530.53

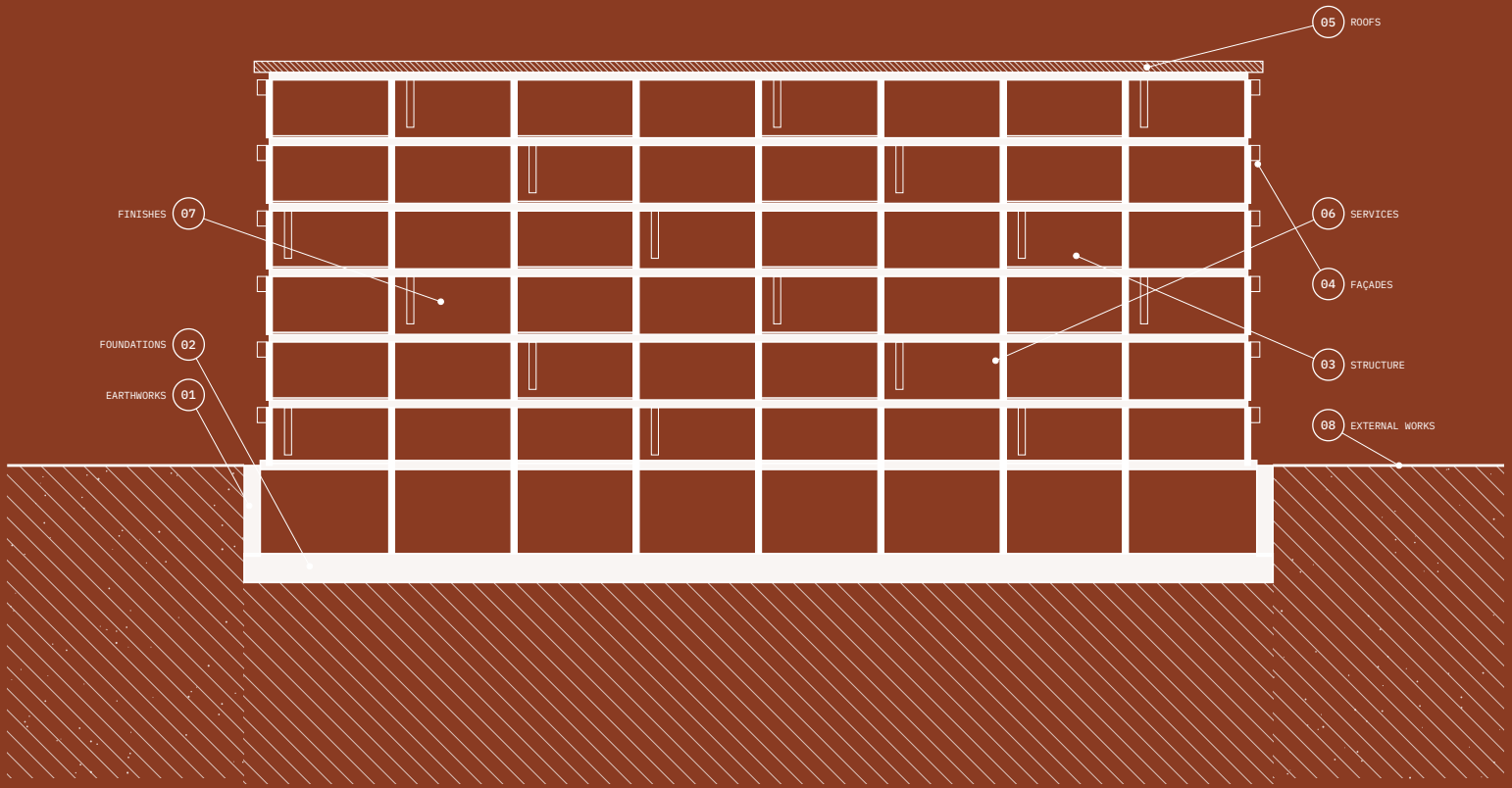
SAMPLE DATA
The project, companies and people in this manual are fictitious. Any resemblance to reality is coincidental.

Version documented: BIM 2.0 (base_bim_2 19.0.19.04.2026) on Odoo 19 Enterprise. Screenshots taken in October 2026.

01

Budgeting theory

The basic concepts for reading, writing and defending a construction budget, before you open the software.



What a budget is
Chapter, item and resource
From PEM to contract price
Quantities and unit prices
Standard or APU
Certification and payment

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Section by chapter	NTS	01/16

01 What a construction budget is

A budget is the **economic translation of the design**: it turns what is drawn into quantities, and quantities into money. It serves three different purposes that should not be confused:

- **Estimate**: know what the work will cost before it is built.
- **Contract**: agree a fixed price between client and contractor.
- **Control**: compare what was planned with what actually happens.

The central idea

Every budget comes down to one formula, repeated at every scale from a single brick to the whole building:

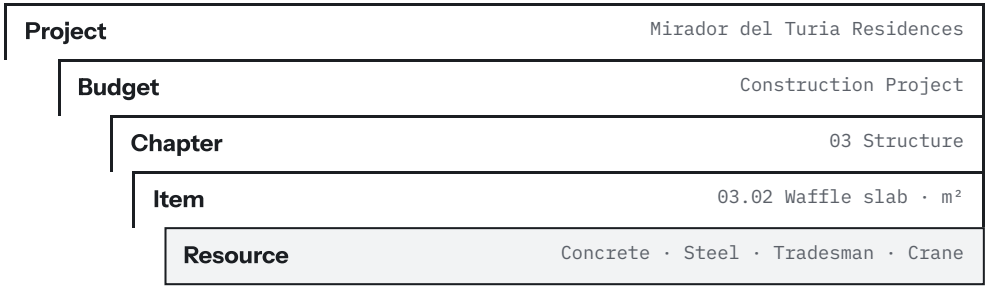
```
Amount = Quantity × Price
```

The **quantity** comes from measuring the design. The **price** comes from analysing which resources one unit needs. A reliable budget is a good take-off multiplied by a good price analysis.

> **RULE OF THUMB**
> The drawing on this chapter's cover sums it up: each budget chapter is a physical part of the building. If you cannot point to it on the section, it is probably missing or surplus.

How it is arranged

A budget is organised as a tree. Each level adds up the amounts of the level below:



Key terms

TERM	MEANING
Chapter	Grouping by trade or phase: structure, roofs, finishes.
Item	Measurable unit of work, with its unit: m², m³, each.
Resource	What the item consumes: material, labour, equipment or subcontract.
Breakdown	List of resources and quantities that make up an item's price.
Productivity	Resource per unit of work, or units of work per hour.

01 Chapter, item and resource: the three key words

If you keep only one page of this chapter, keep this one. Every budget is built from these three pieces, always in this order.

Chapter

A **folder** that is **only there to organise**. It groups work of the same kind or the same phase. It is neither measured nor priced: its amount is the sum of its items.

CODE	EXAMPLE CHAPTERS
01	Site preparation and earthworks
03	Structure
05	Roofs
07	Finishes

Item

A **specific piece of work that can be measured and paid for**, and **the place where resources go**. Also called a unit of work. It always has four data: description, unit of measure, quantity and unit price.

ITEM	UNIT	QUANTITY	PRICE
Waffle slab 30+5 cm	m²	5,986.00	€83.36
HA-30 concrete columns	m³	248.79	€518.97
Lacquered interior door	each	168.00	€201.45

HOW TO SPOT A GOOD ONE

If two people measure it and get different quantities, its description or its unit is badly defined.

Resource

What is consumed to build one unit of the item: the ingredients of the recipe. There are four types:

TYPE	WHAT IT IS	EXAMPLE
Material	What stays in the building	Concrete, steel, tile
Labour	The hours people work	Tradesman, labourer
Equipment	Machinery and plant	Crane, pump, scaffold
Subcontract	Work handed to another firm	Installed lift

How they fit together

Think of a cookbook. The **chapter** is a section of the book, say "Desserts". The **item** is the recipe and how many servings you will make. The **resources** are the ingredients for one serving.

```
Resources → give the item its PRICE
Item → price × quantity = AMOUNT
Chapter → sum of the amounts of its items
Budget → sum of the amounts of its chapters
```

RULE

Resources cannot be placed directly in a chapter. They always go inside an item. If you hang one from a chapter, the budget shows a red alert when you press UPD.

TAKE CARE

Resources are stated **per unit of item**, not for the whole job. 0.21 m³ of concrete is what **one** m² of slab takes, not the whole slab.

01 From construction cost to contract price

The sum of the items is not what the client pays. Overheads, profit and tax are added to it, in this order. Spanish practice uses these terms, which appear throughout BIM 2.0:

ABBR.	NAME	WHAT IT IS
PEM	Material Execution Budget	Sum of all items. What it costs to build.
GG	General overheads	Company structure: office, insurance, finance costs.
BI	Industrial profit	The contractor's margin.
PEC	Contract Execution Budget	PEM + GG + BI. The contract price, excl. VAT.
VAT	Value Added Tax	Applied last, on the PEC.

REFERENCE RATES
In Spanish public works, overheads usually run from 13% to 17% and industrial profit is 6%. Private work is negotiated. VAT depends on the type of work: check it each time.

Example with the manual's project

CONCEPT	%	AMOUNT (€)
PEM		3,021,095.26
General overheads	13%	392,742.38
Industrial profit	6%	181,265.72
PEC excl. VAT		**3,595,103.36**
VAT	10%	359,510.34
Total incl. VAT		**3,954,613.70**

Another figure an architect should always have to hand:

```
Cost per m² = PEM / Floor area
€3,021,095.26 / 5,200 m² = €580.98/m²
```

In BIM 2.0

Overheads, profit and other additions or discounts are handled in the budget's **Assets/Discounts** tab, and can come from a **Template H.D.** The screenshots in this manual show the PEM, because the sample project has no template applied.

01 A breakdown and its take-off

A real breakdown

Waffle slab 30+5 cm, item 03.02 of the sample project, per m²:

RESOURCE	QTY	PRICE	AMOUNT
HA-30 concrete	0.21 m³	98.00	20.58
B500S steel	19.5 kg	0.92	17.94
Reusable waffle pod	1 m²	4.10	4.10
Formwork board	1 m²	6.40	6.40
Formwork carpenter	0.55 h	25.10	13.81
Steel fixer	0.30 h	25.10	7.53
Labourer	0.35 h	20.80	7.28
Tower crane	0.09 h	38.00	3.42
Concrete pump	0.02 h	115.00	2.30
Unit price			**€83.36/m²**

Measuring properly

The take-off breaks an item's quantity into lines anyone can check. Each line says where it is and how much it measures:

LOCATION	N	LENGTH	WIDTH	SUBTOTAL
Block A floors	6	28.00	14.00	2,352.00
Block B floors	6	28.00	13.00	2,184.00
Basement ceiling	1	58.00	25.00	1,450.00
Total m²				**5,986.00**

```
Item amount = 5,986.00 m² × €83.36/m²
= €498,992.96
```

Direct and indirect costs

Direct costs can be assigned to a specific unit: concrete, steel-fixing hours. **Indirect** costs are needed for the job as a whole but cannot be tied to one item: site cabins, the site crane, the site manager, health and safety. They are usually spread as a percentage of direct costs or kept as a chapter of their own.

SITE NOTE

In the sample project, health and safety and waste management are items in chapter 08, in plain sight.

01 Two ways to work out a price: standard or APU

BIM 2.0 can build item prices in two ways. The choice is made per budget and should be taken before you start.

Price by breakdown

This is the usual method in Spain and the format of price databases. An item's price is the sum of its resources. Indirect costs, overheads and profit are applied **afterwards**, on the budget total.

```
Price = Σ (quantity × price of each resource)
```

Unit Price Analysis (APU)

Common in Latin America and in tenders that require each price to be justified. Each item carries **inside it** its own share of administration, margin and financing, so the unit price is already the selling price.

```
Direct cost = materials + equipment + labour
+ subcontract
Subtotal B = direct cost + administration
Price = subtotal B + utility + financing
```

The same item, both ways

HA-30 foundation slab, with the same resources:

COMPONENT	STANDARD	APU
Materials	181.10	181.10
Equipment	6.59	6.59
Labour	35.94	35.94
Direct cost	**223.63**	**223.63**
Utility 12%	on the total	26.84
Unit price	**223.63**	**250.47**

Which should you choose?

IF…	USE
You work with price databases and BC3	Standard
Your contract reads as PEM + GG + BI	Standard
The tender requires each price to be justified	APU
You want to see margin item by item	APU
You work by man-hours and duration	APU HH

CONTINUES IN
Chapter 4 shows how to pick the calculation type on screen and where each result appears.

01 Certifying and getting paid: the project as a process

Once contracted, a project is not paid in one go. Each period, the work done is measured and that is what gets paid. This is **certification**.

Certifying to date

You always work out the total accumulated since the start and subtract what was already certified. That way, an error one month corrects itself the next.

```
This month = Total to date
− Previous total to date
```

Retention

Clients usually withhold a percentage of each payment, typically 5%, as a guarantee that the contractor will finish the job and fix defects. It is released after handover.

```
Certification 6 · €256,097.49
5% retention · −€12,804.87
```

New rates and variations

If a unit appears that was not in the budget, a **new rate** is agreed. If the scope changes, a **variation** is processed. In BIM 2.0 they are recorded as Change Orders.

Three questions that tell you how a project is doing

Financial control comes down to comparing three figures on the same date:

QUESTION	MEASURE
How much should be done by now?	Planned
How much is done, at budget prices?	Certified
How much has it really cost?	Actual cost

Comparing certified with planned tells you if you are **ahead or behind**. Comparing certified with actual cost tells you if you are **making or losing money**. This is the basis of the **earned value** method, covered in chapter 10.

> **COMMON MISTAKE**
> A common mistake is comparing actual cost with planned. A project can spend less than planned simply because it is behind schedule, and that is not good news.

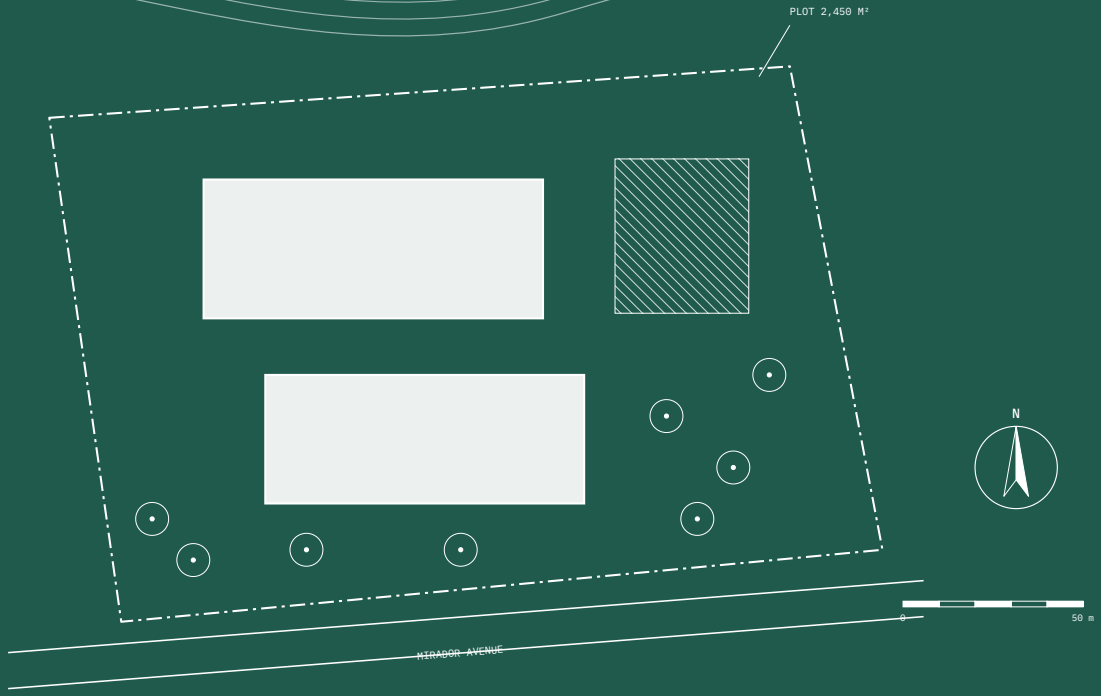
The BC3 format

FIEBDC-3, known as **BC3**, is the Spanish standard for exchanging budgets and price databases between programs. It lets you bring a budget made in other software into BIM 2.0, as chapter 5 explains.

02

Getting started

How to log in, move around the software and read any screen.



What Odoo is
What BIM 2.0 is
Home screen
The BIM menu
How to read a form

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Site plan	1:1000	02/16

02 What Odoo is and what BIM 2.0 is

Odoo

Odoo is business management software, what is known as an **ERP**. It brings together in one system what many companies keep spread across spreadsheets and separate programs: sales, purchasing, accounting, warehouse and staff.

- It runs in your **web browser**; nothing is installed on your computer.
- It works through **apps**: each area is an icon on the home screen.
- All apps share the **same database**: a supplier or product is created once and the whole company sees it.
- Each person logs in with their own **user** and sees only what their profile allows.

> WHY IT MATTERS
> If your company already invoices with Odoo, BIM 2.0 uses those same invoices, suppliers and products. Nothing has to be entered twice.

BIM 2.0

BIM 2.0 is a module installed on top of Odoo that turns it into a construction tool. It adds what a general ERP lacks: projects, budgets by chapter and item, take-offs, certifications, daily site reports, RFIs and cost control.

What it is and is not

BIM 2.0 IS	BIM 2.0 IS NOT
Financial and technical project management	A modelling program like Revit
A system linked to purchasing and accounting	An isolated spreadsheet
One place for all project data	A replacement for the technical design

Its relationship with 3D models is one of **integration**: it can take quantities exported from Revit and turn them into items, as chapter 13 explains.

How they relate

```
Odoo → the company: purchasing, invoices, stock
BIM 2.0 → the project: budget, take-off, certification
You → work in BIM and Odoo does the rest
```

02 The home screen

After logging in you will see the apps you can access. It depends on your profile, so your screen may have fewer icons.

1. **BIM** is the main app. Nearly all of this manual happens here.
2. **Diary Parts** opens the site reports directly, for people who only work on site.

Other apps work alongside BIM:

- **Purchase** for orders and suppliers.
- **Invoicing** for invoices and payments.
- **Inventory** for warehouses.
- **Development** for real estate.

> SITE NOTE
> To come back here from anywhere, press the grid icon at the top left.



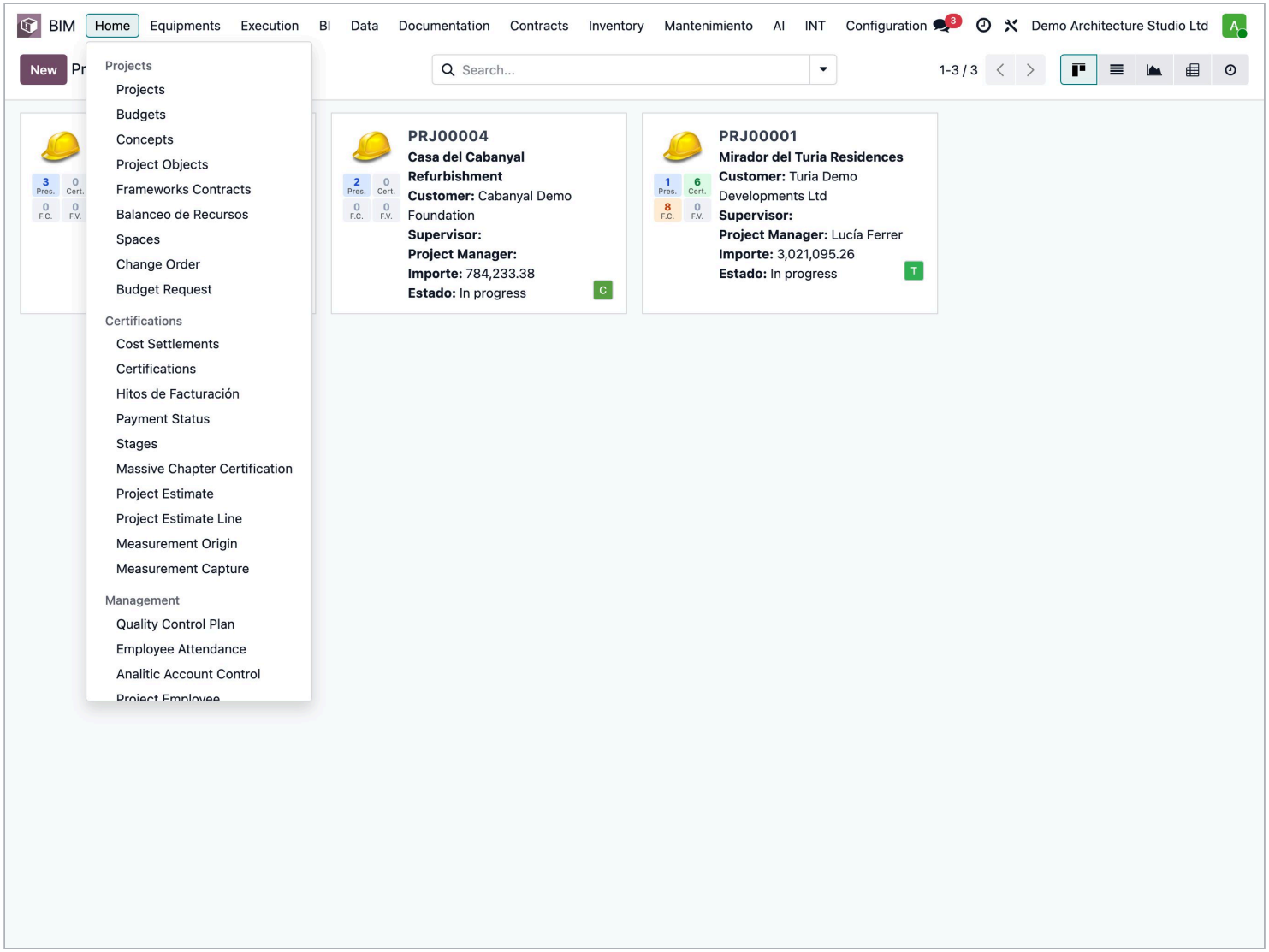
Home screen with the user's apps.

02 The BIM menu

Inside BIM, the top bar groups every function.

MENU	CONTAINS
Home	Projects and certifications
Equipments	Machinery and rentals
Execution	Scheduling, daily reports, cash flow
BI	Dashboards
Data	Prices, templates, employees
Documentation	Documents, tasks, surveys
Contracts	Subcontractors
Inventory	Requests and warehouse
Mantenimiento	Assets and work orders
AI	Assistant and models
INT	BC3, Revit, Autodesk
Configuration	Settings and states

Each dropdown is split into sections. **Home** is the one you will use most.



Home menu open, with the Projects and Certifications sections.

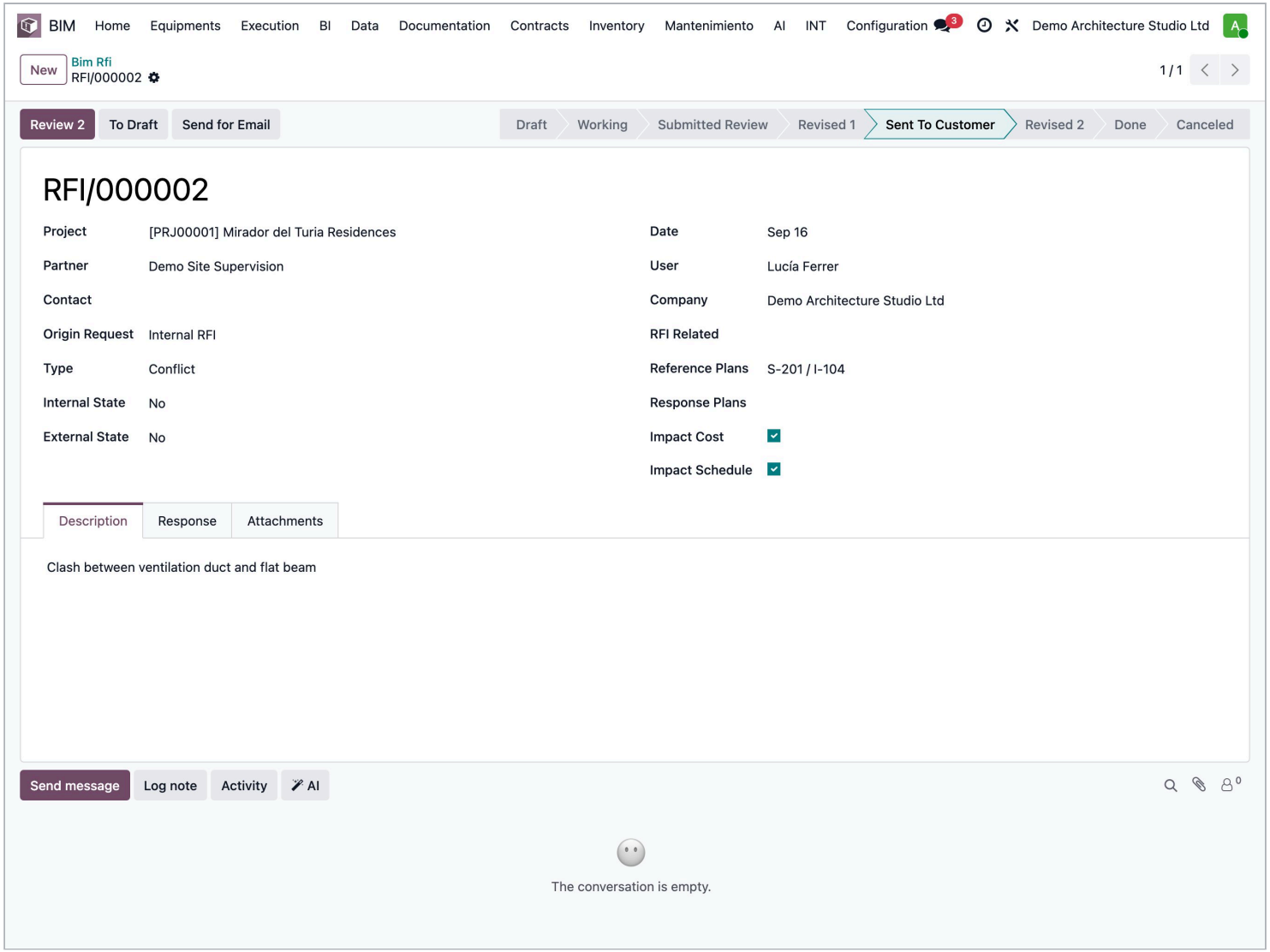
02 How to read a form

Every record in the software, whether a project, an RFI or a certification, follows the same layout:

AREA	WHAT IT DOES
Action buttons	Top left. They run steps in the process.
Status bar	Top right. Shows where the document stands.
Smart buttons	In the header. They show a counter and open related records.
Tabs	Below. They group the detail.
Chatter	Logs changes, notes and messages with author and date.

SITE NOTE

Changes save automatically when you leave a record. To undo them first, use the discard icon that appears next to the name.

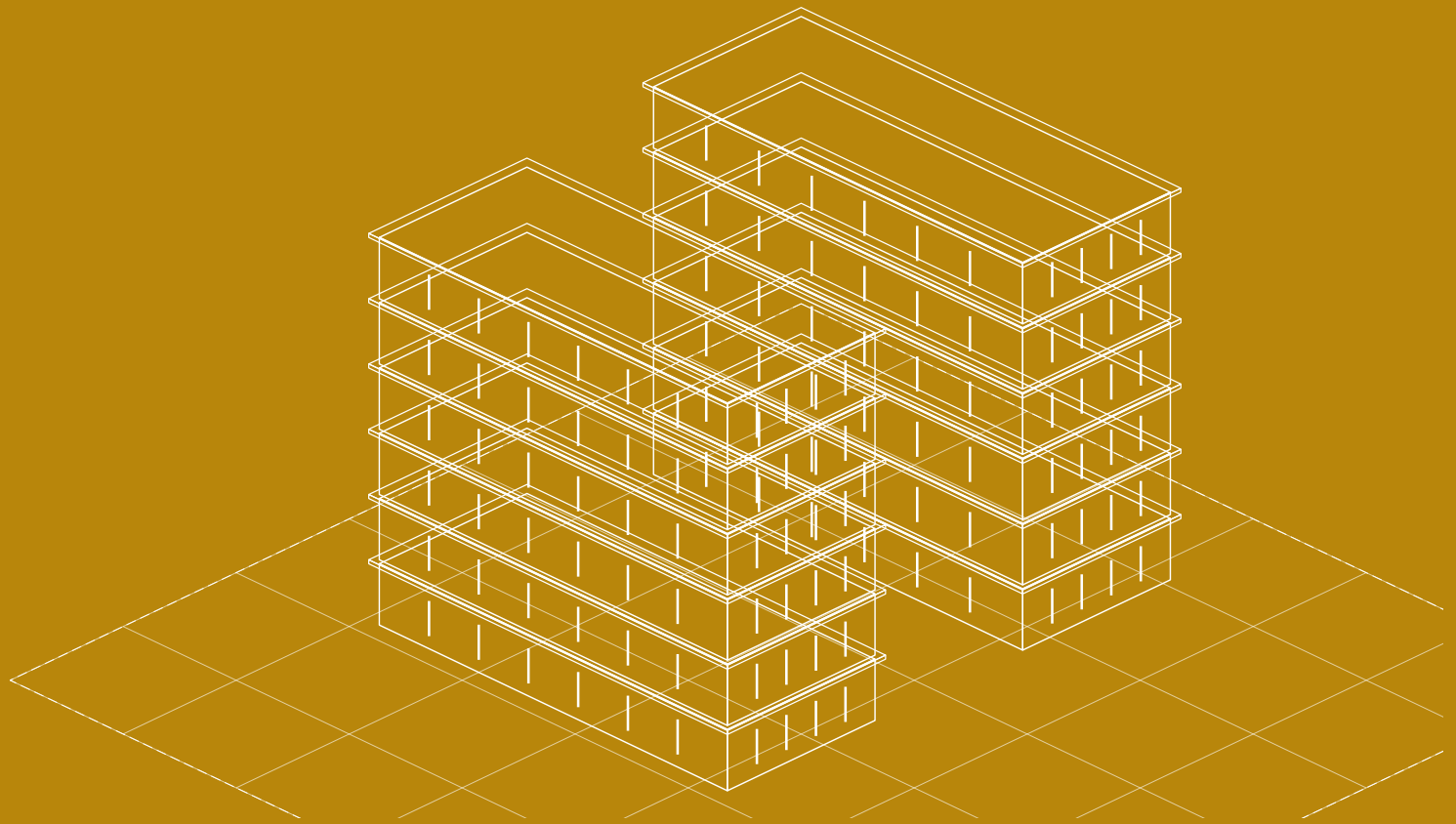


An RFI record: buttons, status bar, data and tabs.

03

The project

The project record is the container for everything: budgets, purchases, documents and costs all hang from it.



Create a project
Read the record
States
Analytic account

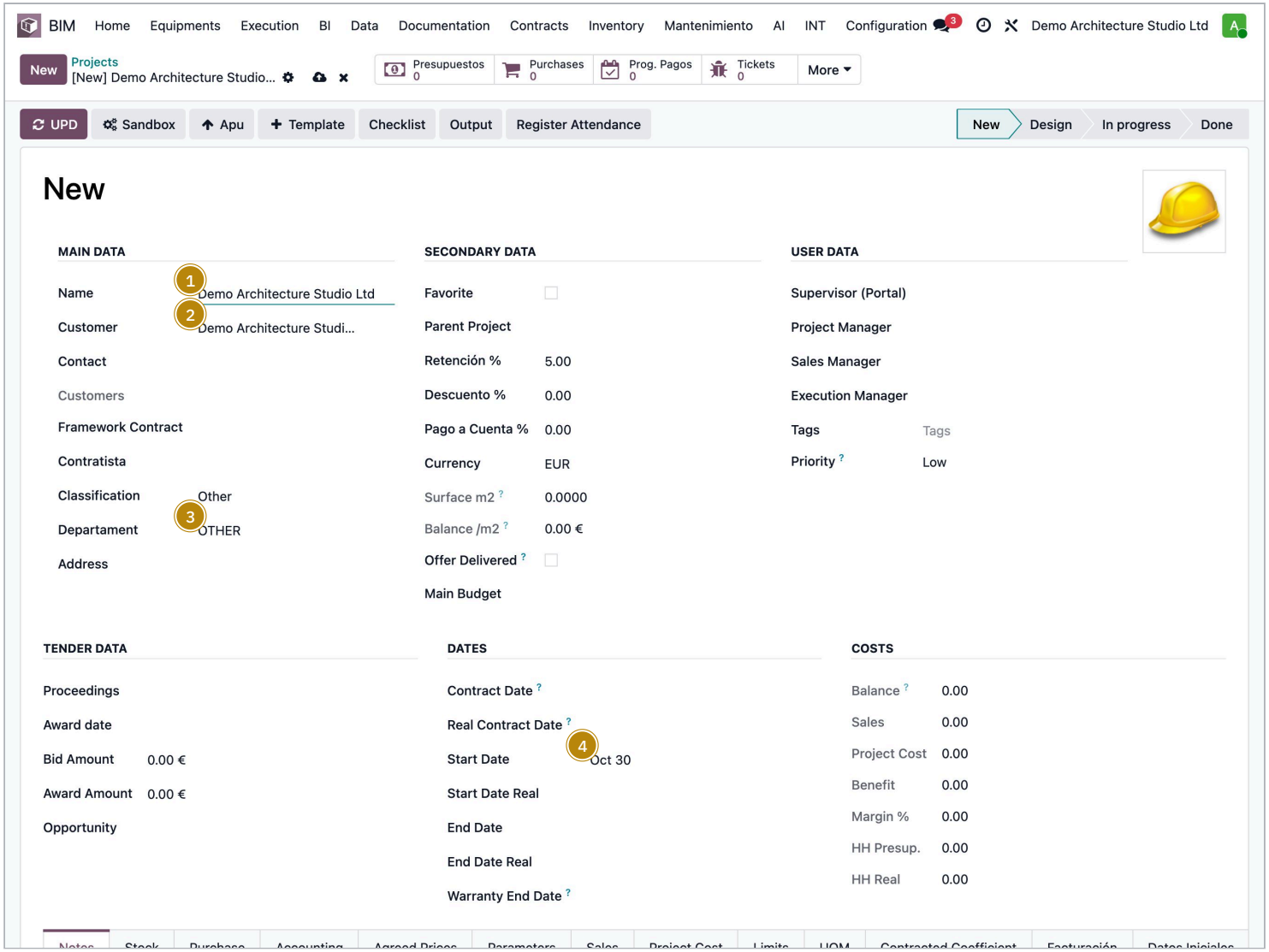
PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Axonometric	NTS	03/16

03 Create a project

1. Go to **Home › Projects › Projects**.
2. Press **New**.
3. Fill in the main data.
4. Save. The PRJ code is assigned automatically.

1. **Name** of the project.
2. **Customer** who commissions it.
3. **Department**, if your company requires it.
4. **Start date**, in the Dates block.

> BEHIND THE SCENES
> When the project is created, the software also generates its **analytic account**. That account is what collects the costs, as chapter 9 explains.



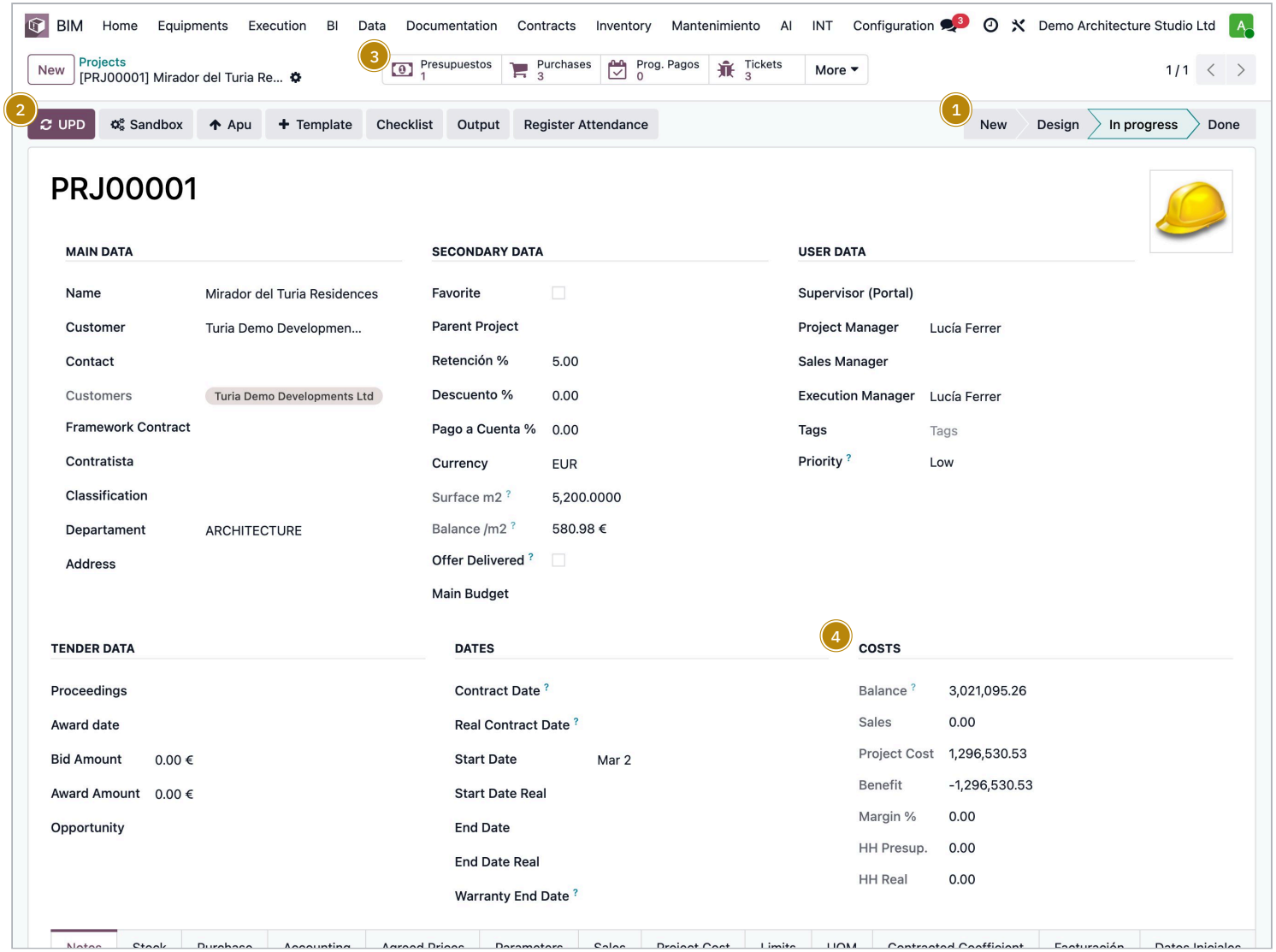
New project form.

03 Read the project record

1. **State** of the project. Click a stage to change it.
2. **UPD** recalculates the project totals.
3. **Smart buttons**: budgets, purchases, tickets, documents. **More** shows the rest.
4. **Costs**: amount, sales, site costs, profit and margin.

Data worth completing

- **Surface m2**: gives you the amount per m². In the sample, €580.98/m².
- **Retención %**: applied in the payment statuses.
- **Project Manager** and **Execution Manager**.



Record of the Mirador del Turia Residences project.

03 Project list views

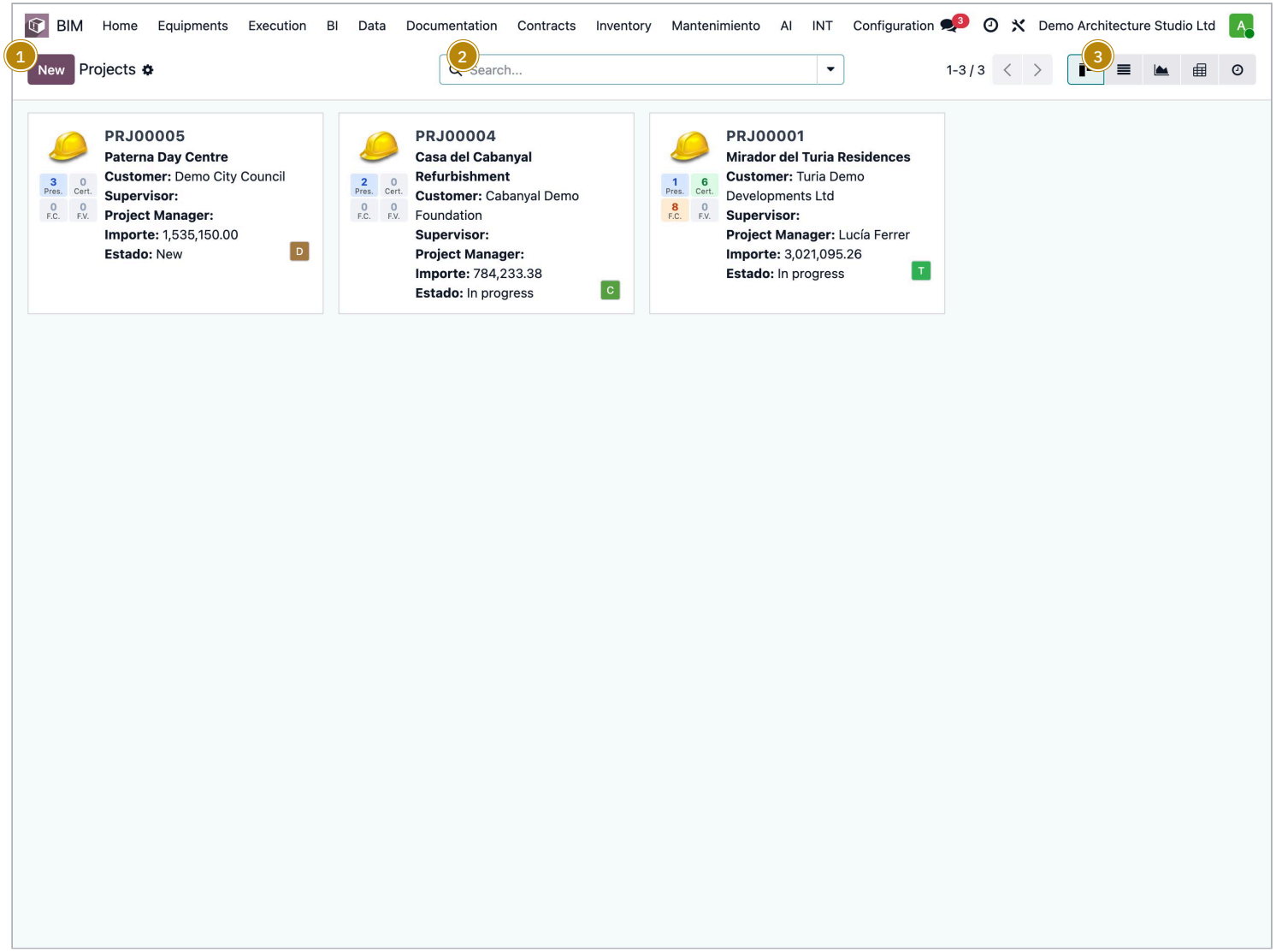
1. **New** creates a project.
2. **Search** with filters and grouping.
3. **View switcher**: cards, list, chart, calendar.

Project states

The software comes with **New** and **Finished**, and you can add your own. The sample also uses:

New	Design	In progress	Finished

They are set up under **Configuration › States**. Each state can define, among other things, whether the project accepts attendance or timesheets.

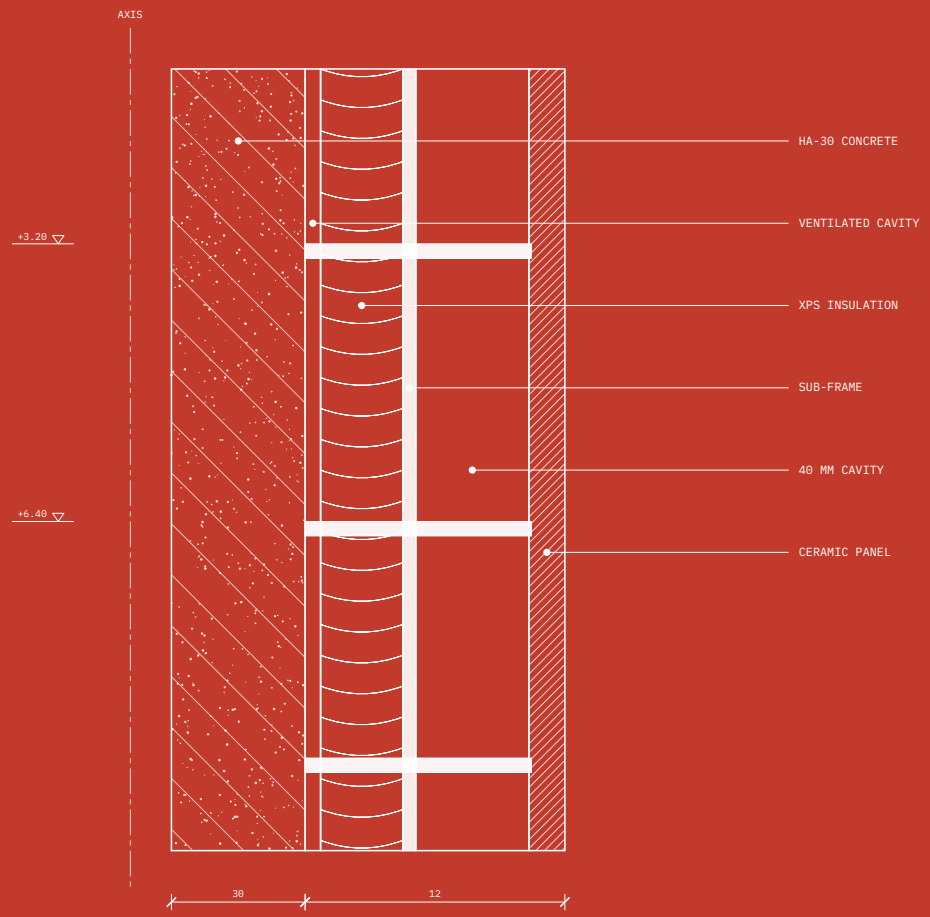


Card view: each project shows customer, manager, amount and state.

04

The budget

From theory to the screen: how to create, break down and measure a budget in BIM 2.0.



Create the budget
Standard, APU and APU HH
The concept tree
Take-offs
Keyboard shortcuts
Reports

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Façade detail	1:10	04/16

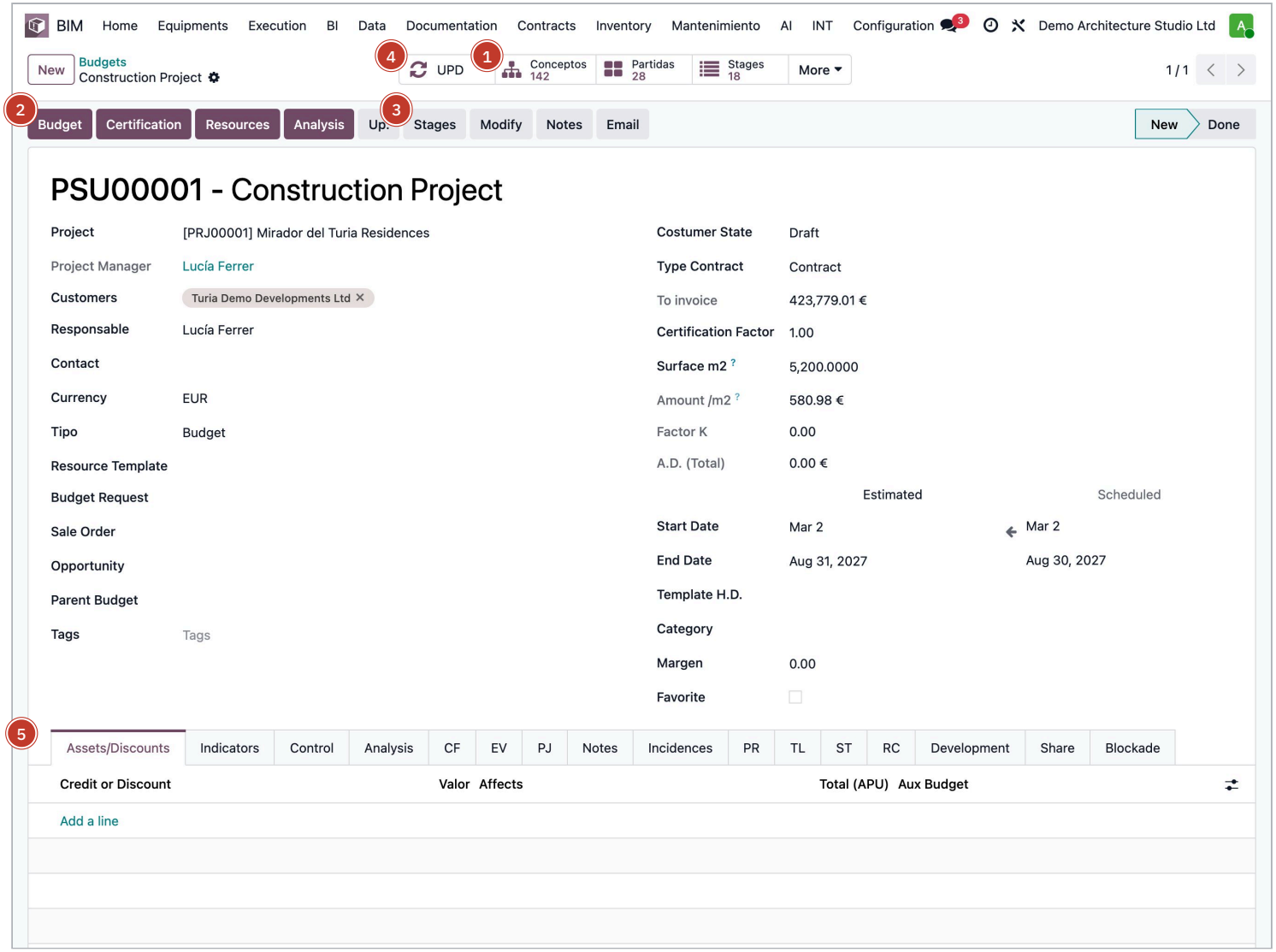
04 Create a budget

The easiest way is from the project itself.

1. Open the project and press the **Budgets** button.
2. Enter name, start and end dates, and type.
3. Press **Conceptos** to open the tree.
4. Create the first chapter.

1. **Conceptos**: opens the tree. The counter shows how many there are.
2. **Budget**, Certification, Resources and Analysis produce reports.
3. **Stages** creates the certification calendar.
4. **UPD** recalculates all amounts.
5. **Tabs** for analysis and settings.

REMEMBER
Totals do not recalculate on their own. After changing prices or quantities, press **UPD**.



Record of budget PSU00001.

04 Choose the budget type

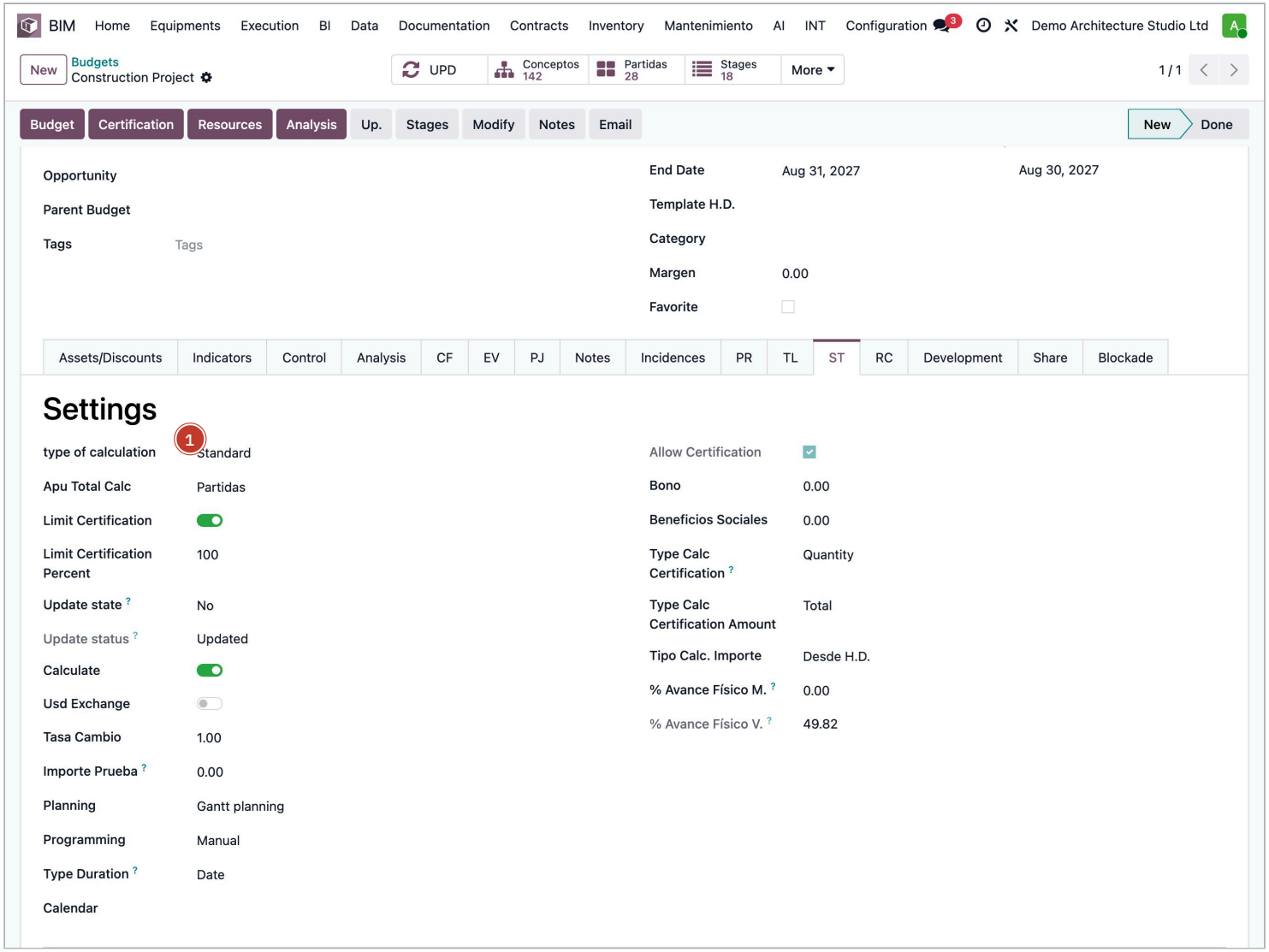
The calculation type is set in the budget's ST tab, in the Settings block.

1. **Type of calculation**: Standard, Apu or Apu HH.

TYPE	ITEM PRICE
Standard	Sum of the amounts of its resources.
Apu	Direct cost + administration + utility + financing.
Apu HH	Like Apu, but labour and equipment are multiplied by duration.

The default for new budgets is set in the BIM 2.0 settings.

WARNING
Decide the type before loading the budget. Changing it later alters the price of every item.



ST tab: budget calculation settings.

04 Standard budget

This is the mode of the sample project. Each resource works out its amount and the item adds them up.

How each line is calculated

CONCEPT	CALCULATION
Material	quantity × price × (1 + waste %)
Labour and equipment	quantity × price
… with productivity	quantity × price × hours per day / productivity
Item	sum of its resources × measured quantity
Chapter	sum of its items

If the item has a **productivity** value, labour and equipment are worked out from it. If you leave it at zero, the software uses the quantity per unit directly, which is usual when the price comes from a database.

Margin per item

A standard budget also accepts a utility percentage, which produces a **sale price** without changing the cost.

Example: item 03.02

BLOCK	AMOUNT €/M²
Materials	49.02
Labour	28.62
Equipment	5.72
Cost	**83.36**

```
5,986.00 m² × €83.36/m² = €498,992.96
```

When to fix the price by hand

The item's Price Type field decides where the price comes from:

MODE	USE
Calculated	The price comes from the resources. This is the norm.
Fixed	Closed price: resources are ignored.

SITE NOTE

Use Fixed for lump sums you have not broken down yet. Review them before contracting, because they do not reflect actual cost.

04 APU budget

In an Apu budget, each item shows its analysis in the APUs tab.

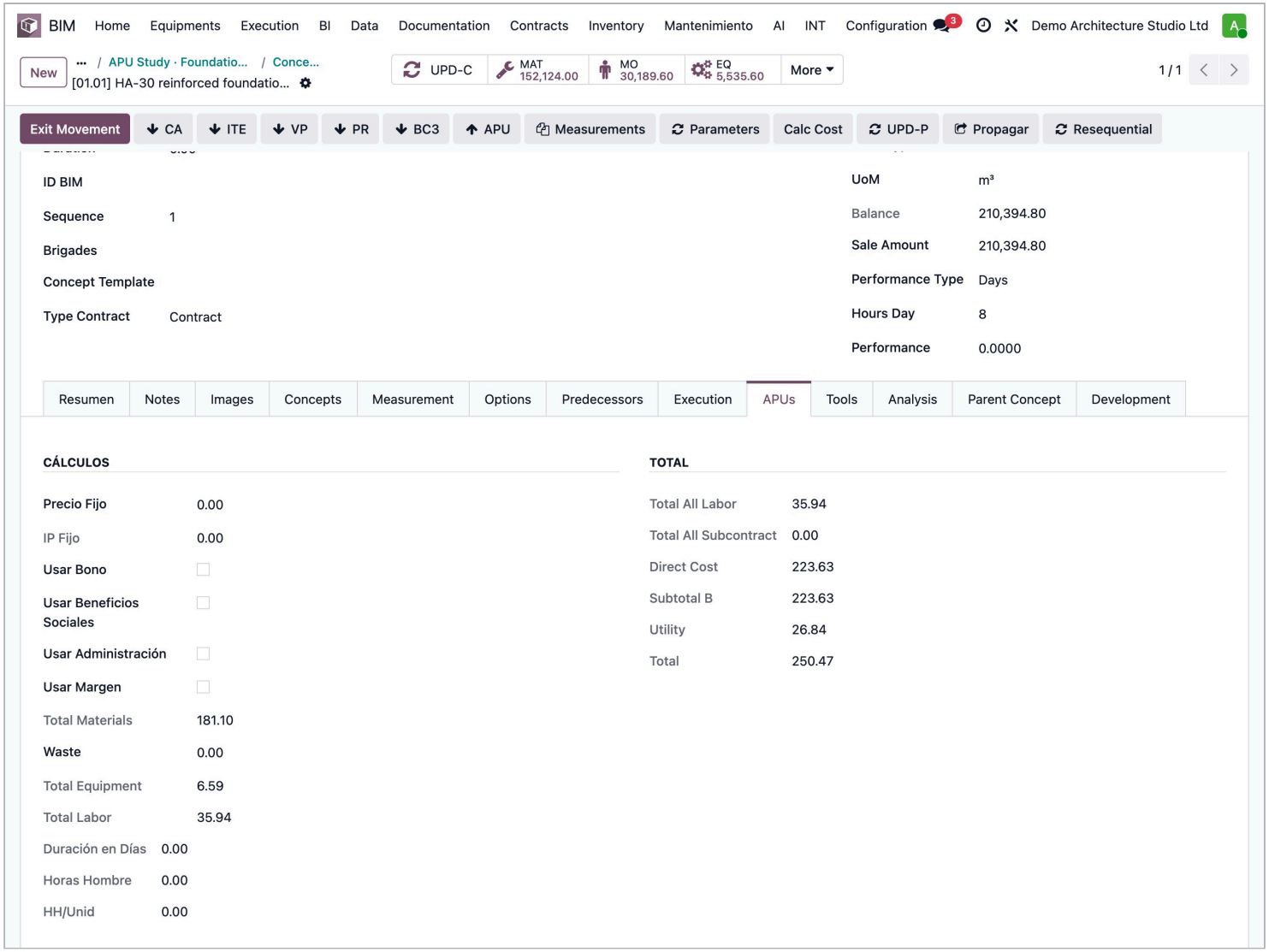
LINE	€/M³
Total materials	181.10
Total equipment	6.59
Total labour	35.94
Direct costs	**223.63**
Subtotal B	223.63
Utility 12%	26.84
Total	**250.47**

The bonus, social benefits, administration and margin checkboxes let that item use its own value instead of the budget default.

If you enter a **fixed price**, it replaces the calculated one, and the analysis stays as a reference.

SITE NOTE

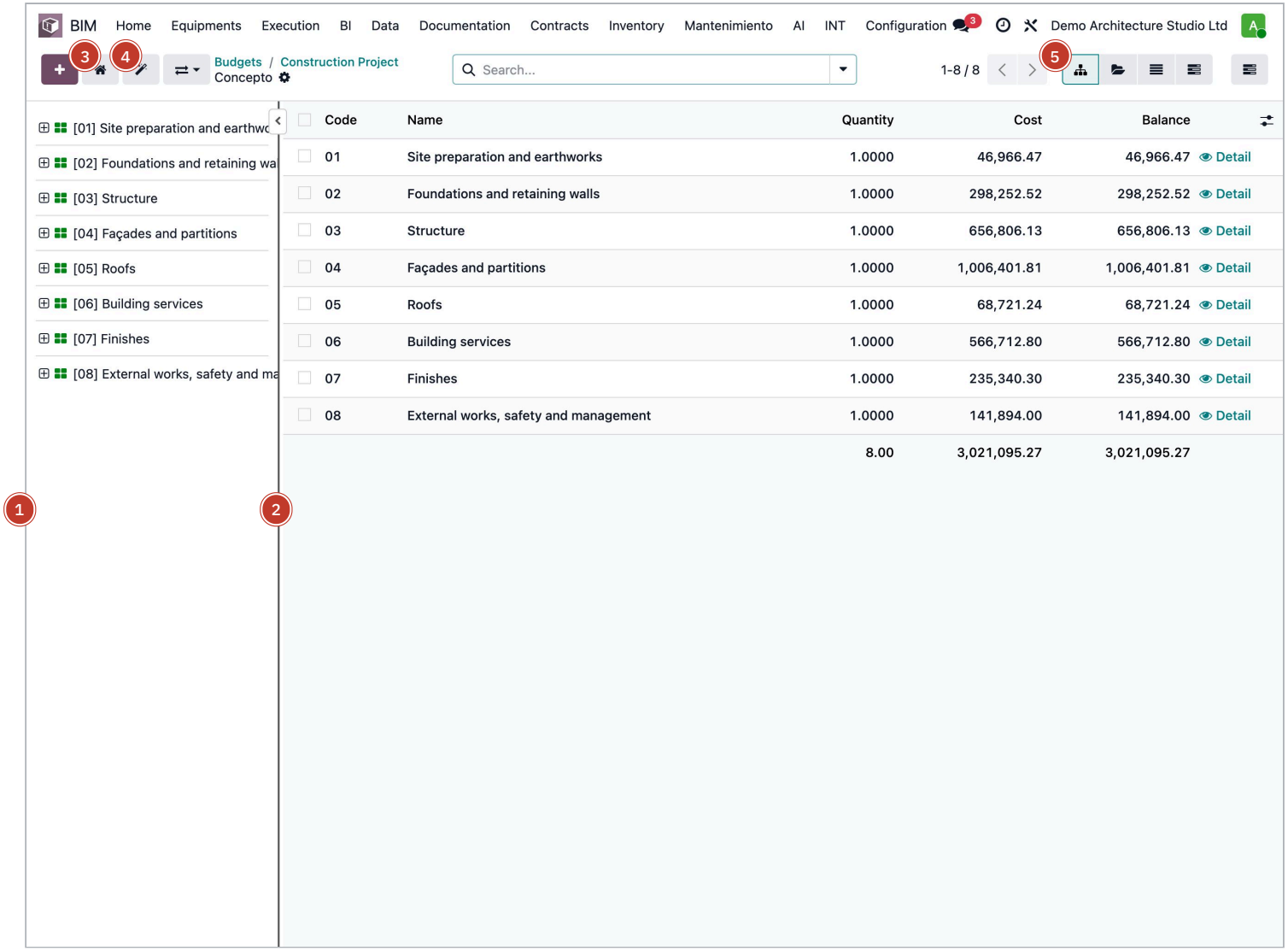
Apu HH adds duration: productivity divided by the sum of labour quantities. It is useful when pricing by man-hours.



Item 01.01 of budget PSU00009, type Apu, with 12% utility.

04 The concept tree

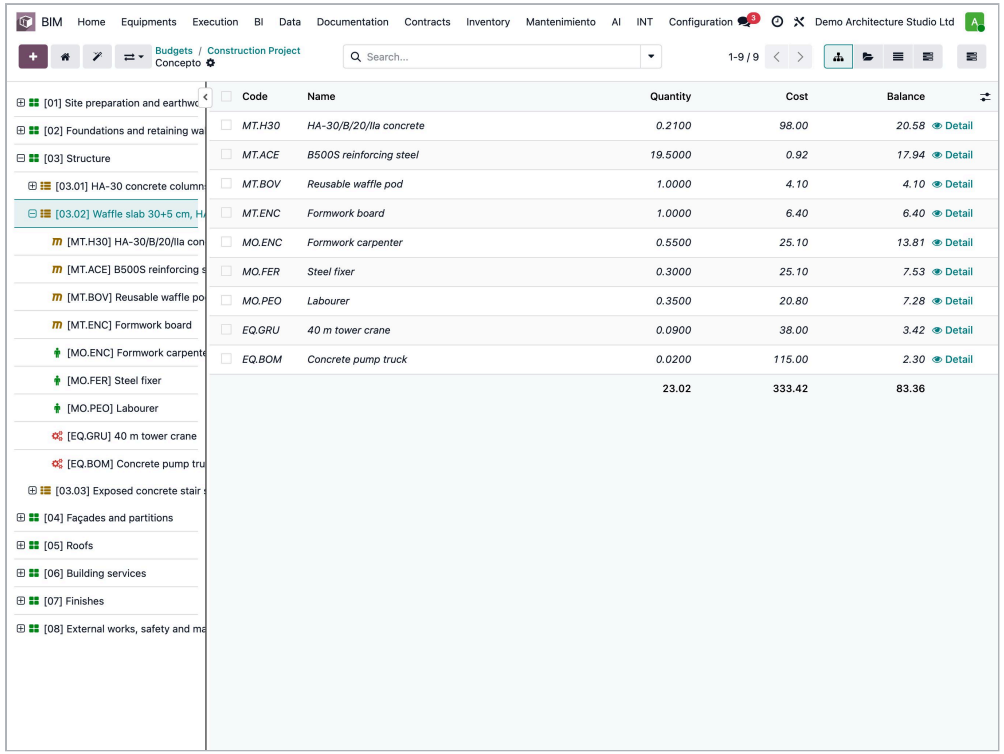
1 Tree panel. **2** Editable list of children. **3** Back to the budget. **4** AI assistant. **5** Switch view.



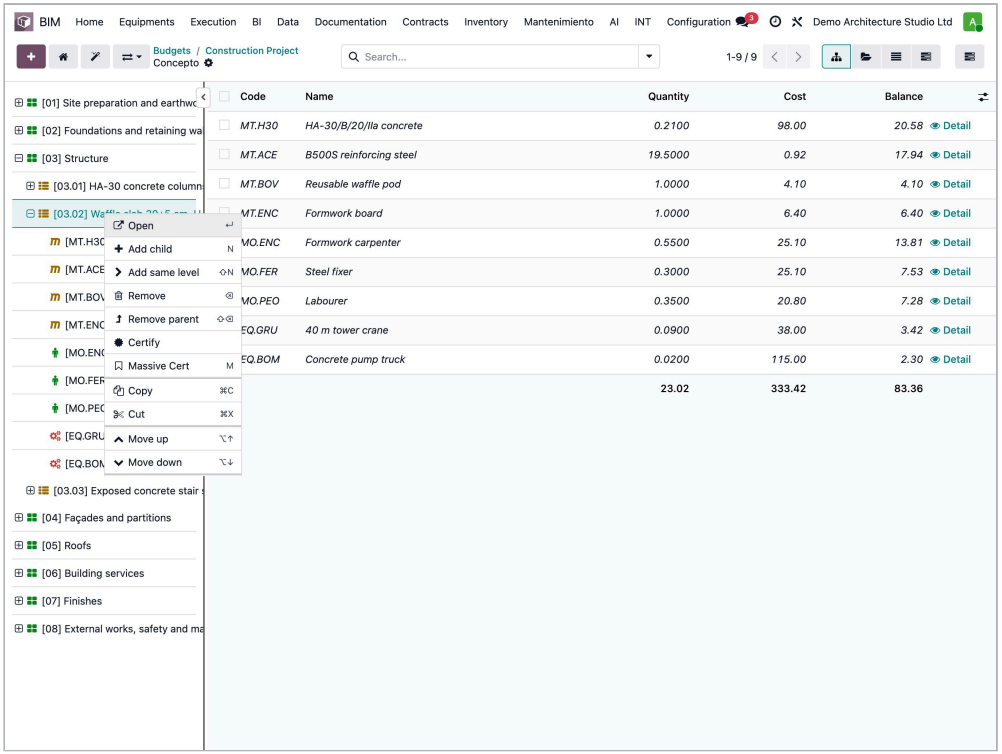
Budget tree: chapters on the left, the content of the selected element on the right.

04 Expand and edit

Select any element and the central list shows what it contains. The software suggests the right type when you add a child: an item under a chapter, a material under an item.



When you select an item, the right side shows its resources, editable in line.



Right-click: open, add, certify, copy, move.

04 Tree keyboard shortcuts

With the focus on the tree, these keys speed up budget writing considerably.

KEY	ACTION
`Enter`	Open the concept
`N`	Add child
`Shift` + `N`	Add at the same level
`Del`	Delete
`Ctrl` + `C` / `X` / `V`	Copy, cut and paste
`Alt` + `↑` / `↓`	Move up or down
`R`	Update the concept
`U`	Update the budget
`E` / `Shift` + `E`	Expand or collapse all

SITE NOTE

Select several elements with `Ctrl` or `Shift` and click, and apply the action to them all.

The four tree modes

The selector in the top bar changes the columns you see.

MODE	SHOWS
Budget	Quantity, cost and amount
Certification	Also quantity and % certified
Execution	Actual execution data
Programming	Planning data

Concept types

The icon in the tree identifies each one:

TYPE	WHERE IT GOES
Chapter	At the root or inside another chapter
Item	Inside a chapter
Material, Labour, Equipment, Subcontract	Inside an item
Function	Inside an item, to calculate percentages

RULE

Resources cannot be placed directly in a chapter. The chapter organises and the item holds the resources. If you do it, pressing UPD shows a red alert asking you to add an item between them.

04 Take-offs

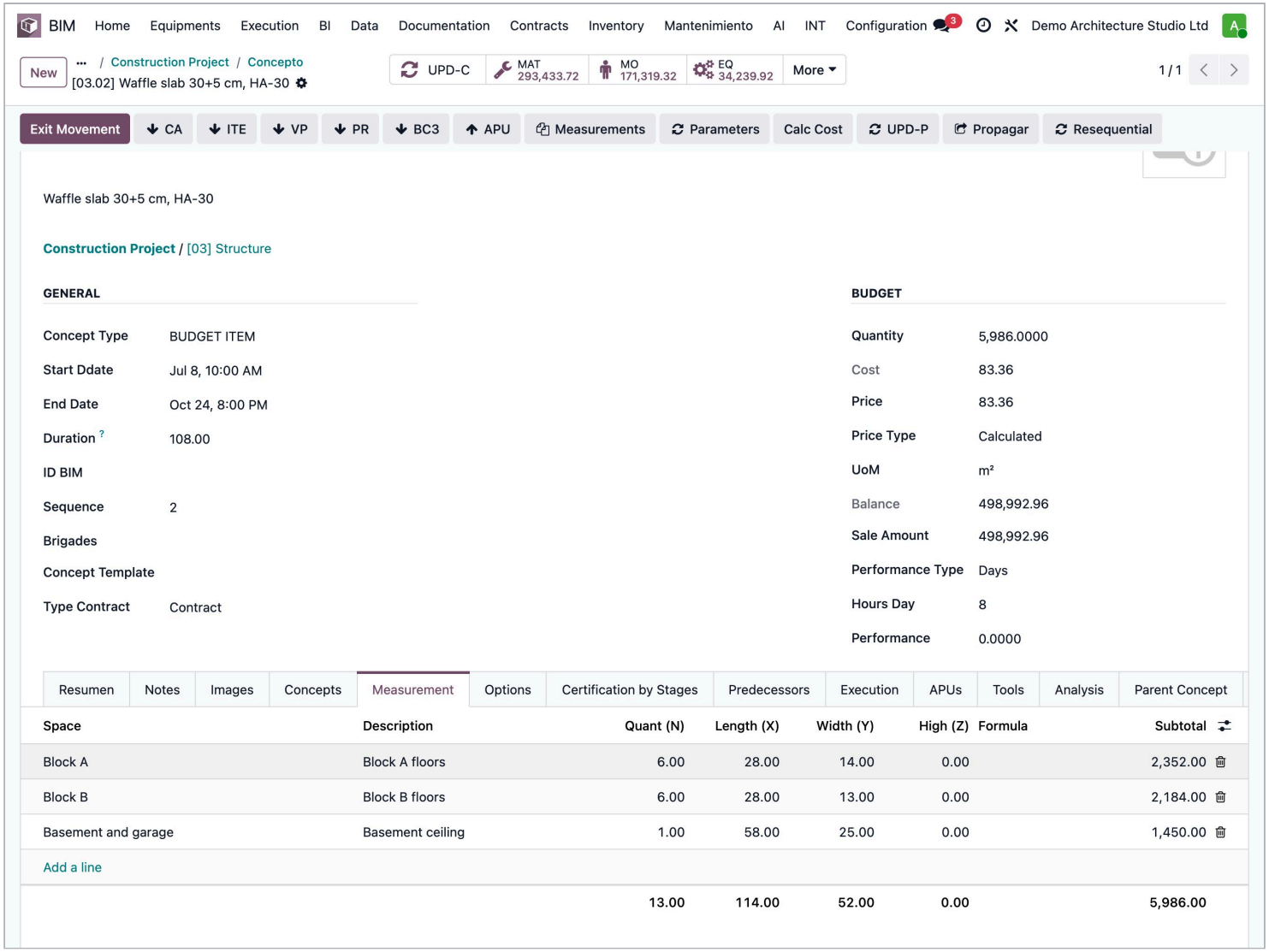
Open the item and go to the **Measurement** tab. Each line has:

COLUMN	MEANING
Space	Where it is: Block A, basement…
Description	Free text
Quant (N)	Number of equal units
Length, Width, High	X, Y, Z
Formula	Optional, for geometry
Subtotal	Result of the line

```
Subtotal = N × Length × Width × Height
Empty dimensions count as 1
```

The sum becomes the item's **quantity**. In the sample, 6 × 28 × 14 = 2,352 m².

> SITE NOTE
> Define the project **Spaces** first. You can then see and filter how much work there is in each block.



Take-off of slab 03.02, split by block.

04 Budget reports

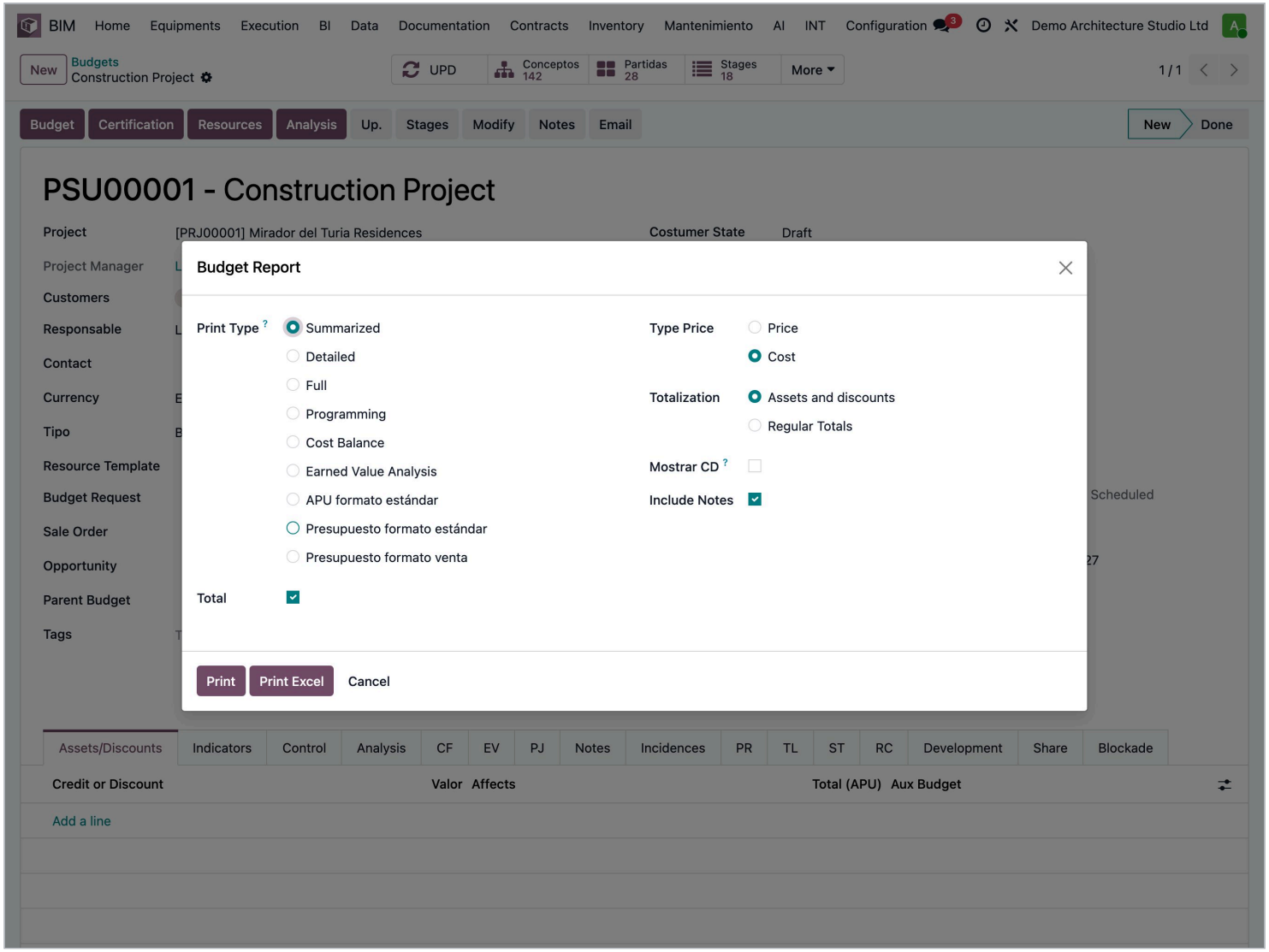
RULE

Before producing any report, press UPD on the budget. Amounts do not recalculate on their own: without UPD, the report may show old figures.

1. Open the budget.
2. Press **UPD** and wait for it to finish.
3. Press the report button.
4. Choose the options and generate it.

After you accept the reminder to update prices, the **Budget** button offers several layouts: Summarized, Detailed, Full, Programming, Cost Balance, Earned Value Analysis, and APU and budget formats.

Choose price or cost, then press **Print** or **Print Excel**.

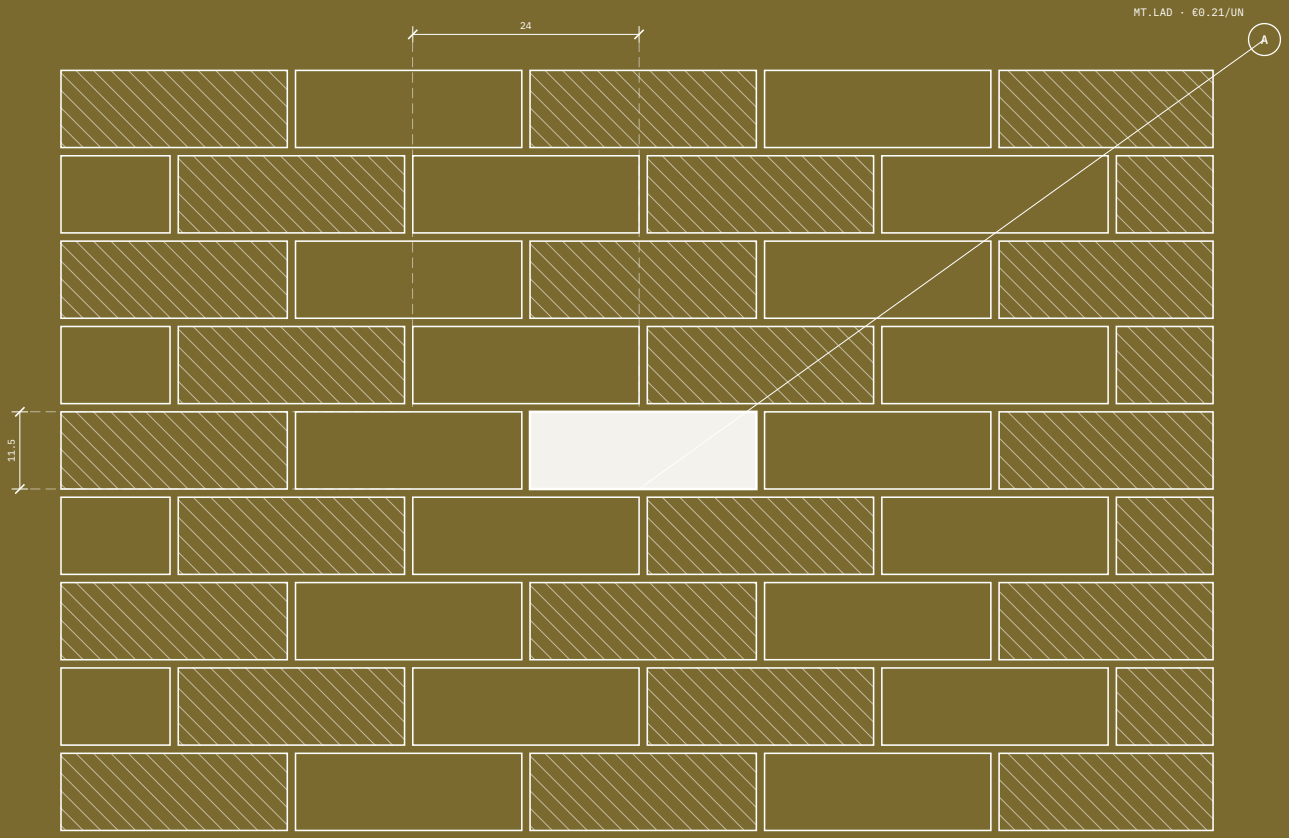


Budget report window: layout, price type and totals.

05

Prices and import

Reuse what you already have: your own price templates and budgets in BC3 format.



Unit prices
Save an item as a template
Import a BC3 file
Import prices step by step

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Bond and unit	1:5	05/16

05 Unit prices

Unit prices are your library of standard items. They are under **Data › Concept Template**.

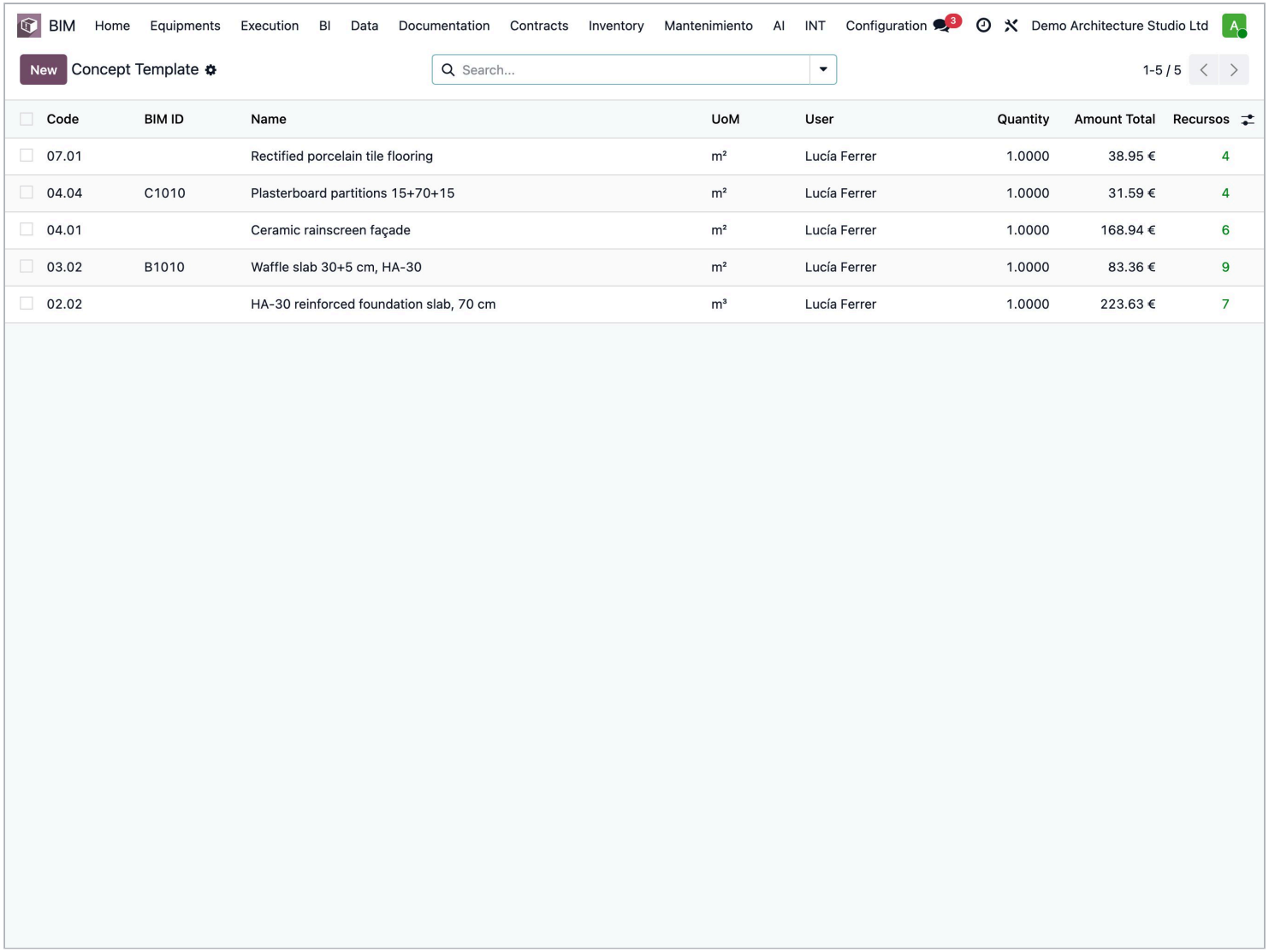
How to create them

- **From an item**: open an item in a budget and press **APU**. It is saved with its resources.
- **By hand**: with **New** in the list.
- **From a BC3 file**: with the step-by-step importer.

How to use them

Inside an item, **Apply Concept Template** copies the resources of the chosen price.

> SITE NOTE
> The code must be unique. If one already exists, the software warns you and does not overwrite it.



Code	BIM ID	Name	UoM	User	Quantity	Amount Total	Recursos
07.01		Rectified porcelain tile flooring	m²	Lucía Ferrer	1.0000	38.95 €	4
04.04	C1010	Plasterboard partitions 15+70+15	m²	Lucía Ferrer	1.0000	31.59 €	4
04.01		Ceramic rainscreen façade	m²	Lucía Ferrer	1.0000	168.94 €	6
03.02	B1010	Waffle slab 30+5 cm, HA-30	m²	Lucía Ferrer	1.0000	83.36 €	9
02.02		HA-30 reinforced foundation slab, 70 cm	m³	Lucía Ferrer	1.0000	223.63 €	7

Library with five unit prices created from the sample project.

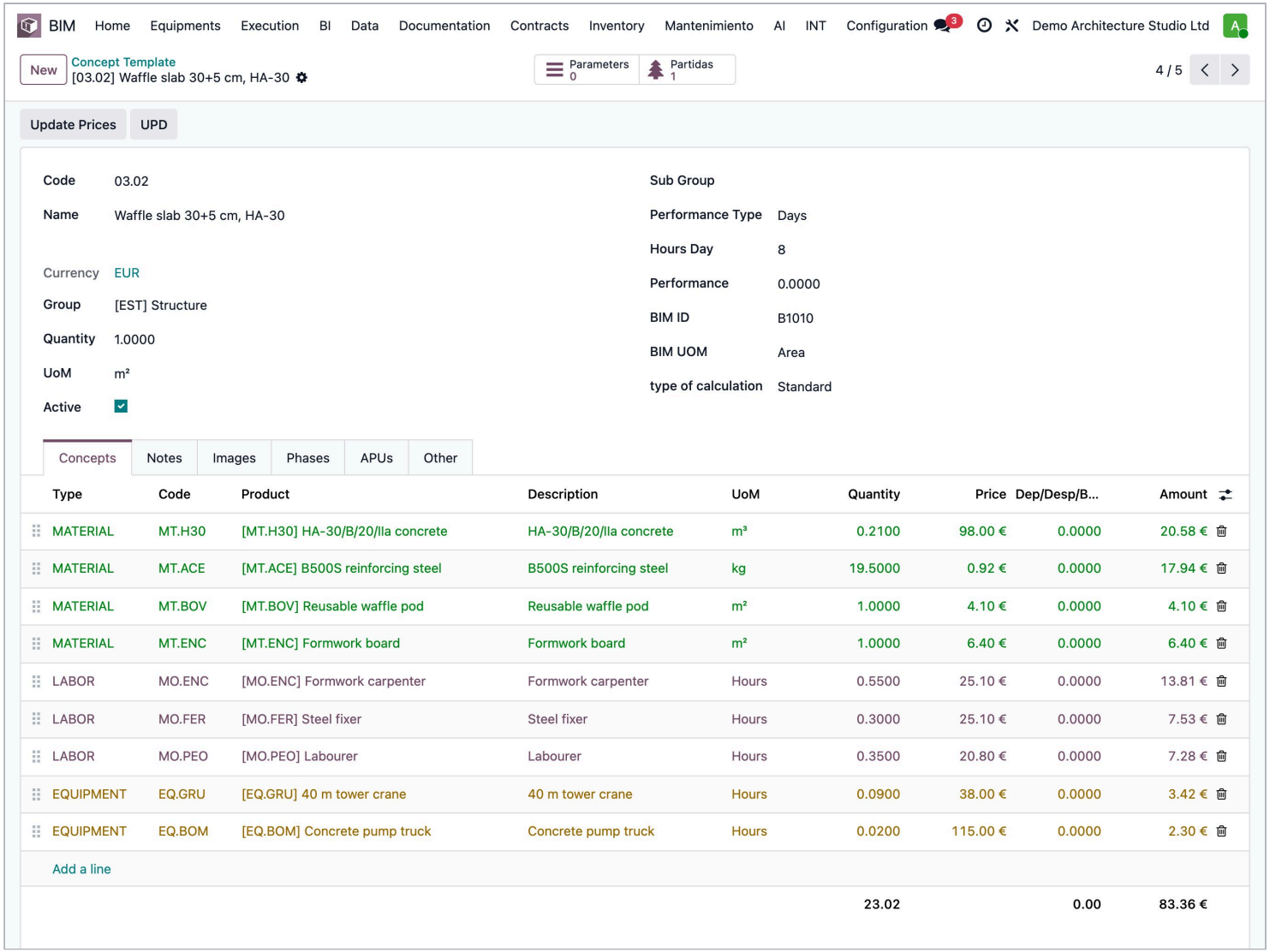
05 A unit price record

It holds the same as an item, without depending on any project:

- **Code and name**.
- **Group** and Sub-Group, to classify it.
- **Unit** and productivity.
- **Concepts**: the list of priced resources.

The update prices button refreshes amounts with current product prices.

> SITE NOTE
> The **BIM ID** and **BIM UOM** fields link this price to the Revit model (chapter 13).



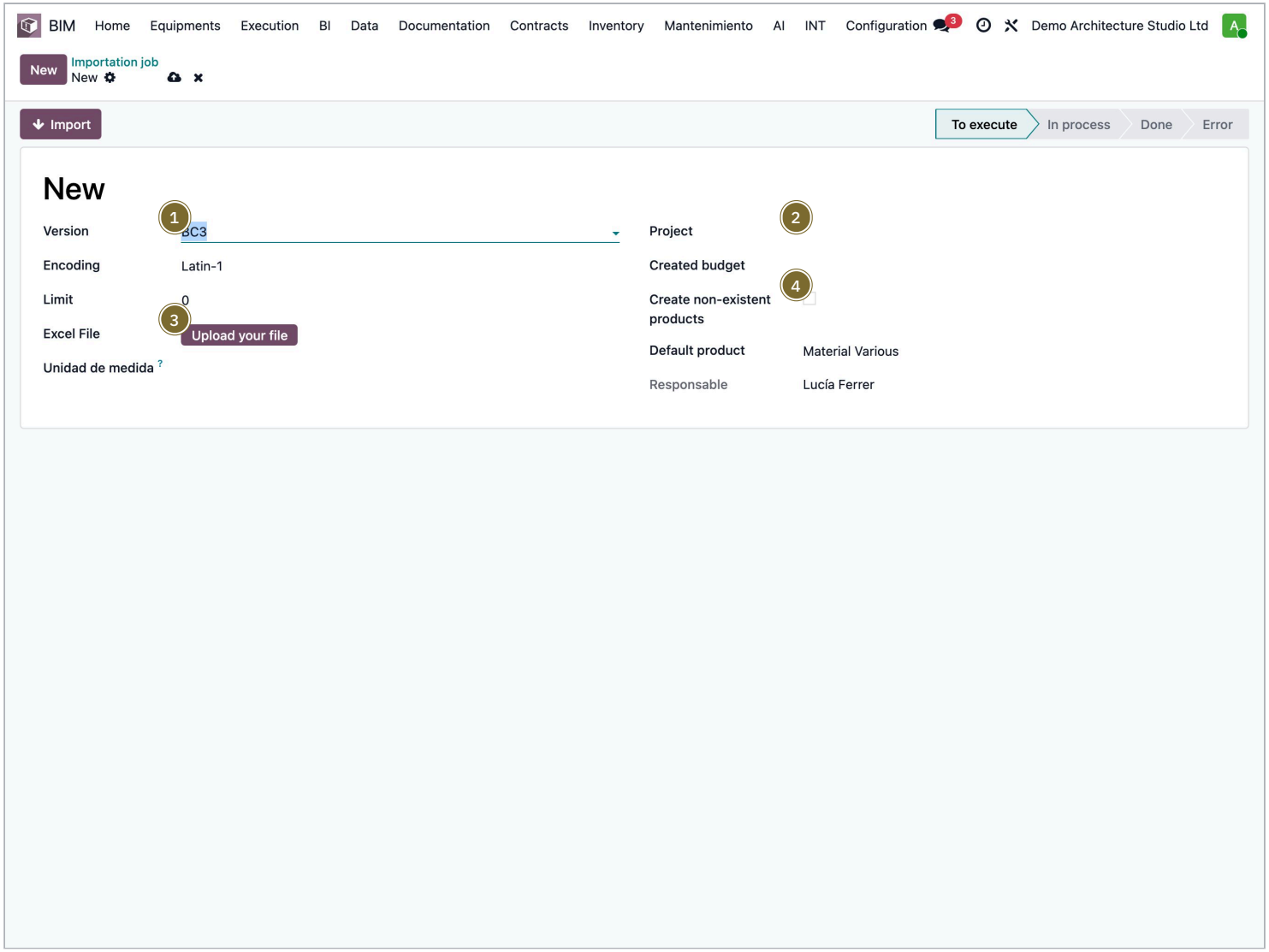
Unit price of the slab, with its group and breakdown.

05 Import a BC3 budget

1. Go to **INT › Budget Importer › Importation job**.
2. Press **New**.
3. Choose the version and the target project.
4. Upload the file and press **Import**.

1. **Version**: BC3, Excel template, Project XML and others.
2. **Project** in which the budget is created.
3. **File** to import.
4. **Create non-existent products**: registers new resources.

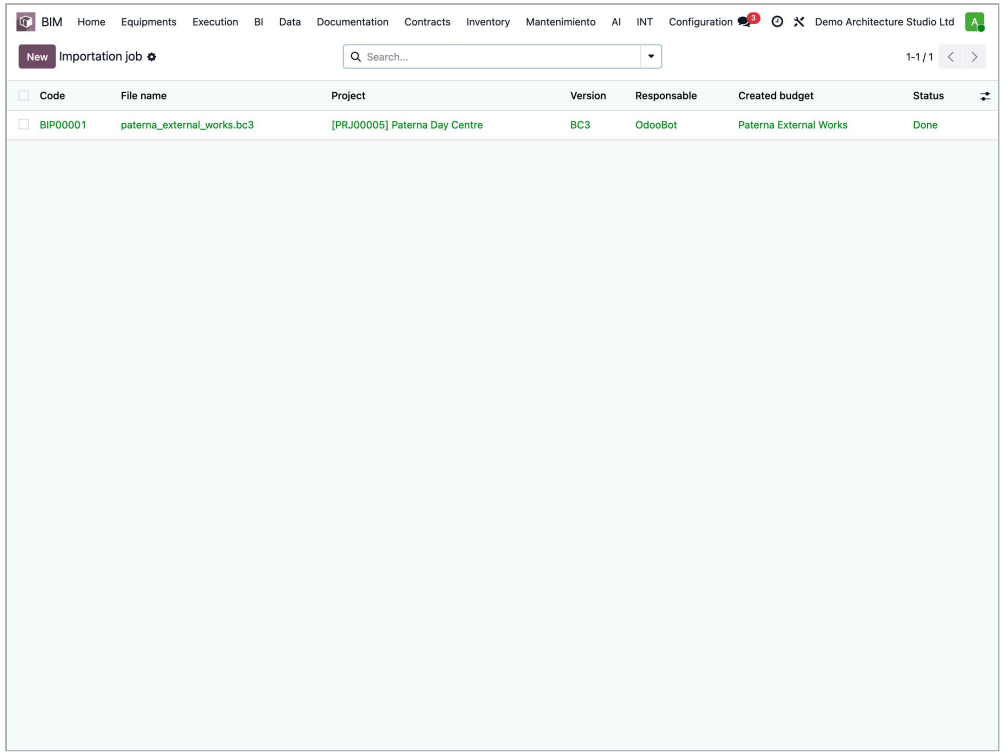
> **WARNING**
> The extension must be lower case: **.bc3**. A **.BC3** file is rejected. Rename it before uploading.



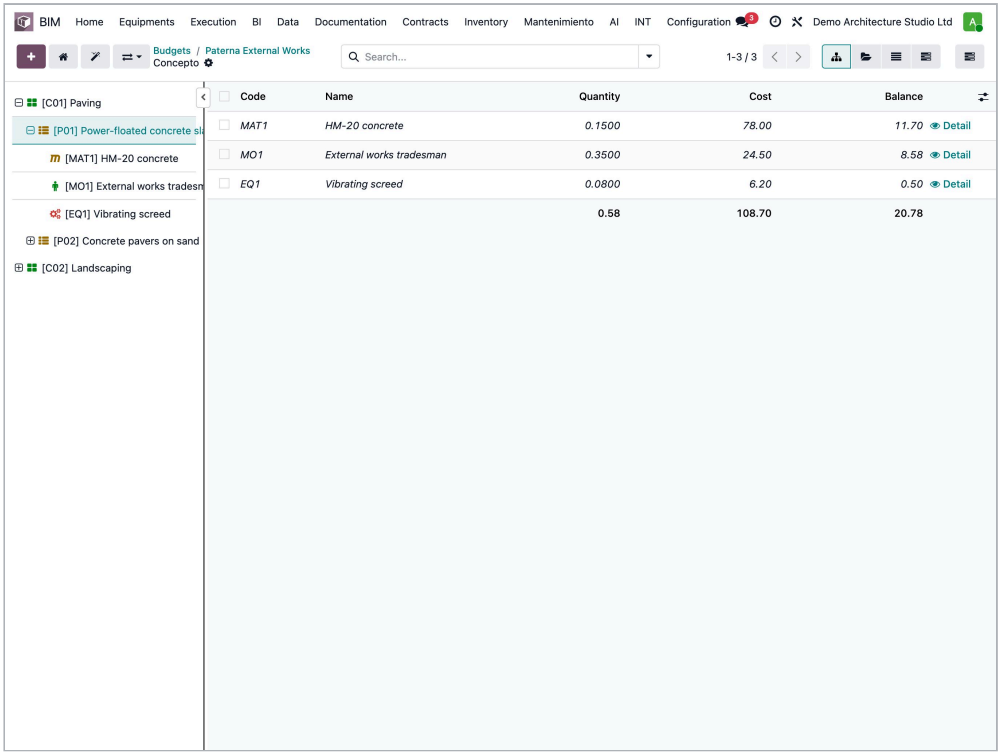
Import form.

05 Import result

The software creates a new budget with the file's structure: chapters, items, resources and prices. Always check the total against the source program and press **UPD** when finished.



Import BIP00001 finished. Remove the "To execute" filter to see completed ones.



The imported BC3, with chapters, items and resources in the tree.

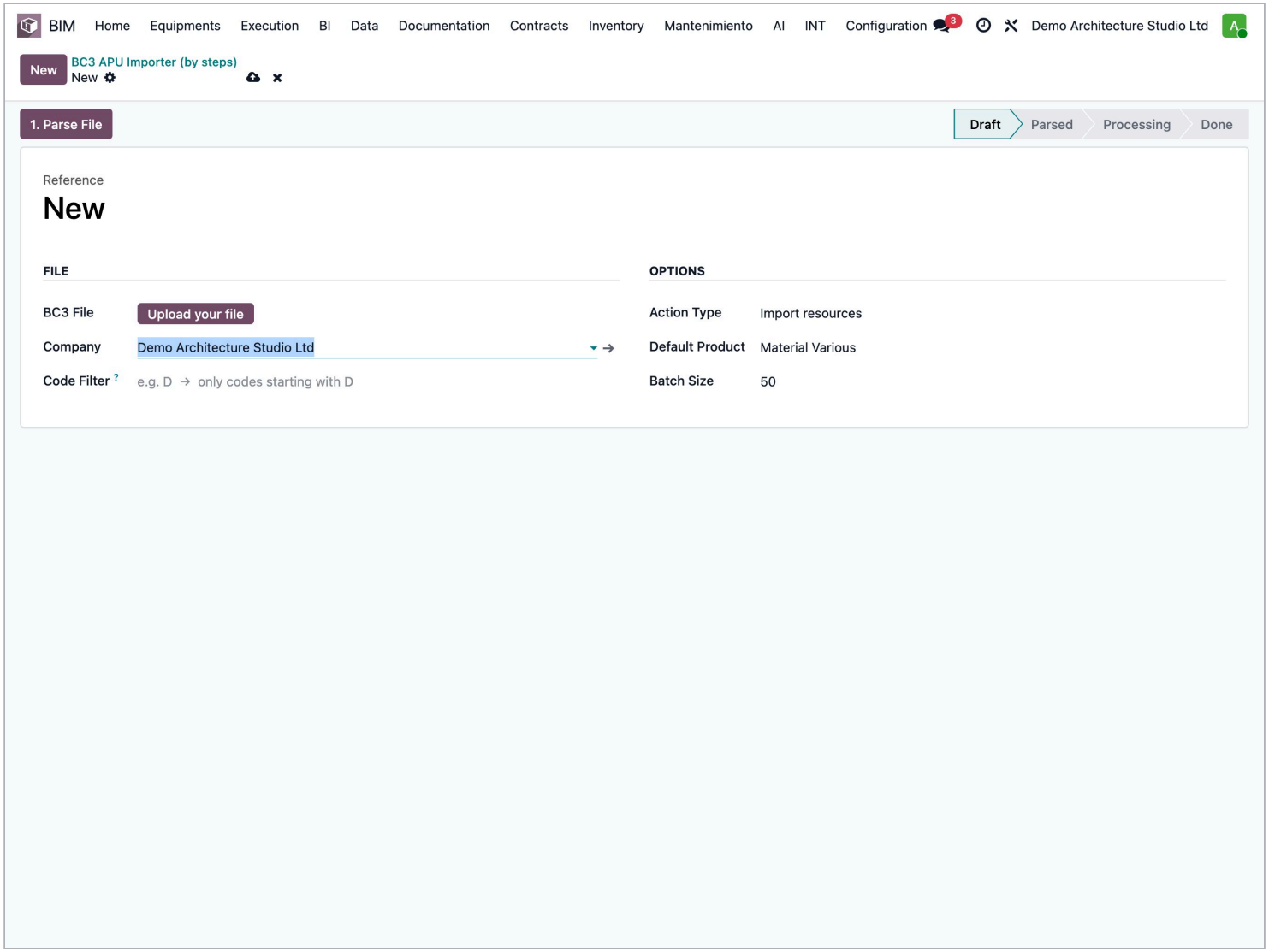
05 Import prices step by step

For large price libraries, **INT › Importar APU por pasos (BC3)** processes the file in batches instead of all at once.

Draft	Parsed	Processing	Done

1. Upload the BC3 file.
2. Press **1. Parse File**.
3. Filter if you only want codes with a given prefix.
4. Process the batches until finished.

The result goes into the **Concept Template** library, not into a budget.

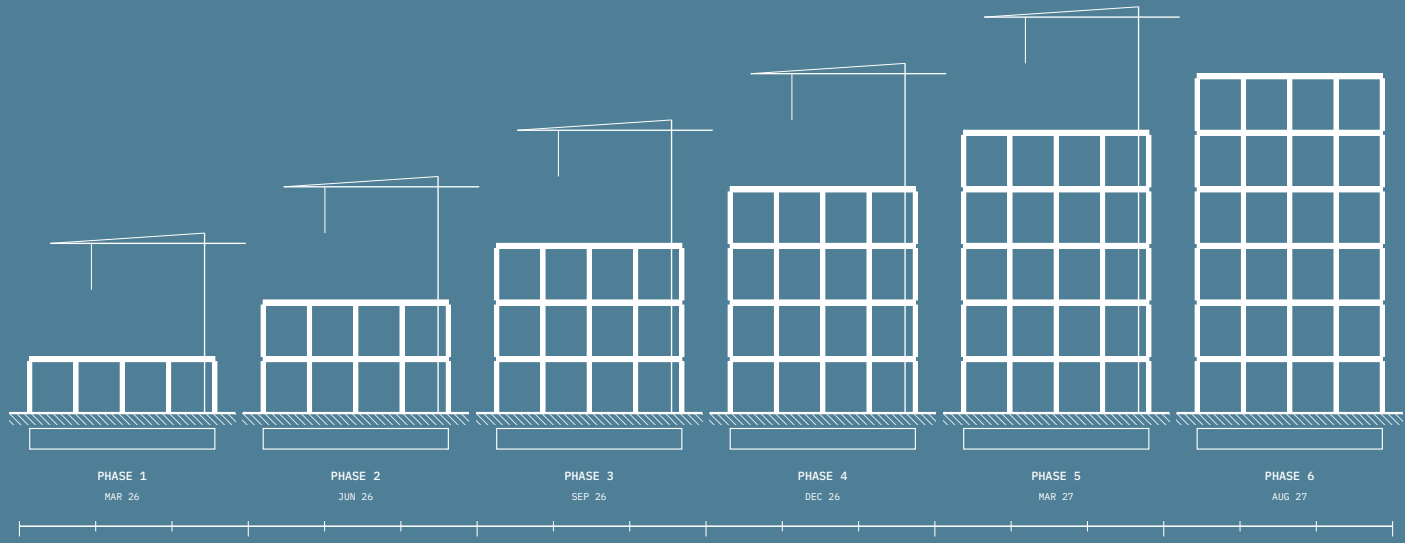


Step-by-step APU importer.

06

Planning

Spread the budget over time: certification stages, Gantt chart and S-curve.



Stages
Gantt schedule
S-curve
Tasks

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Construction phases	NTS	06/16

06 Create the stages

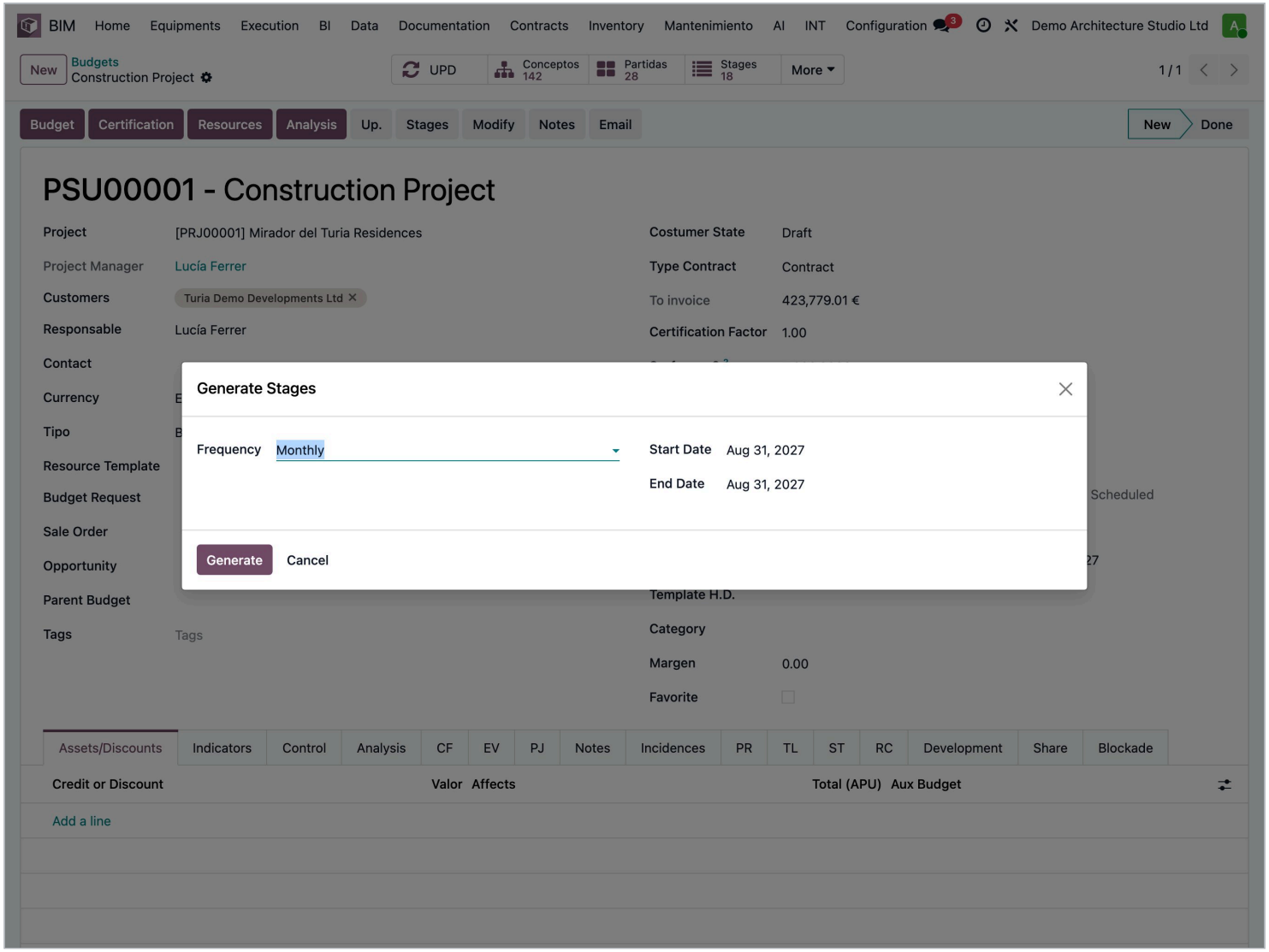
Stages are the certification periods. Without them you cannot certify.

1. Open the budget.
2. Press **Stages** in the header.
3. Choose the frequency: weekly, fortnightly, monthly, bimonthly, quarterly or half-yearly.
4. Check the dates and press **Generate**.

Each stage moves through these states:

Pending	Current	Approved

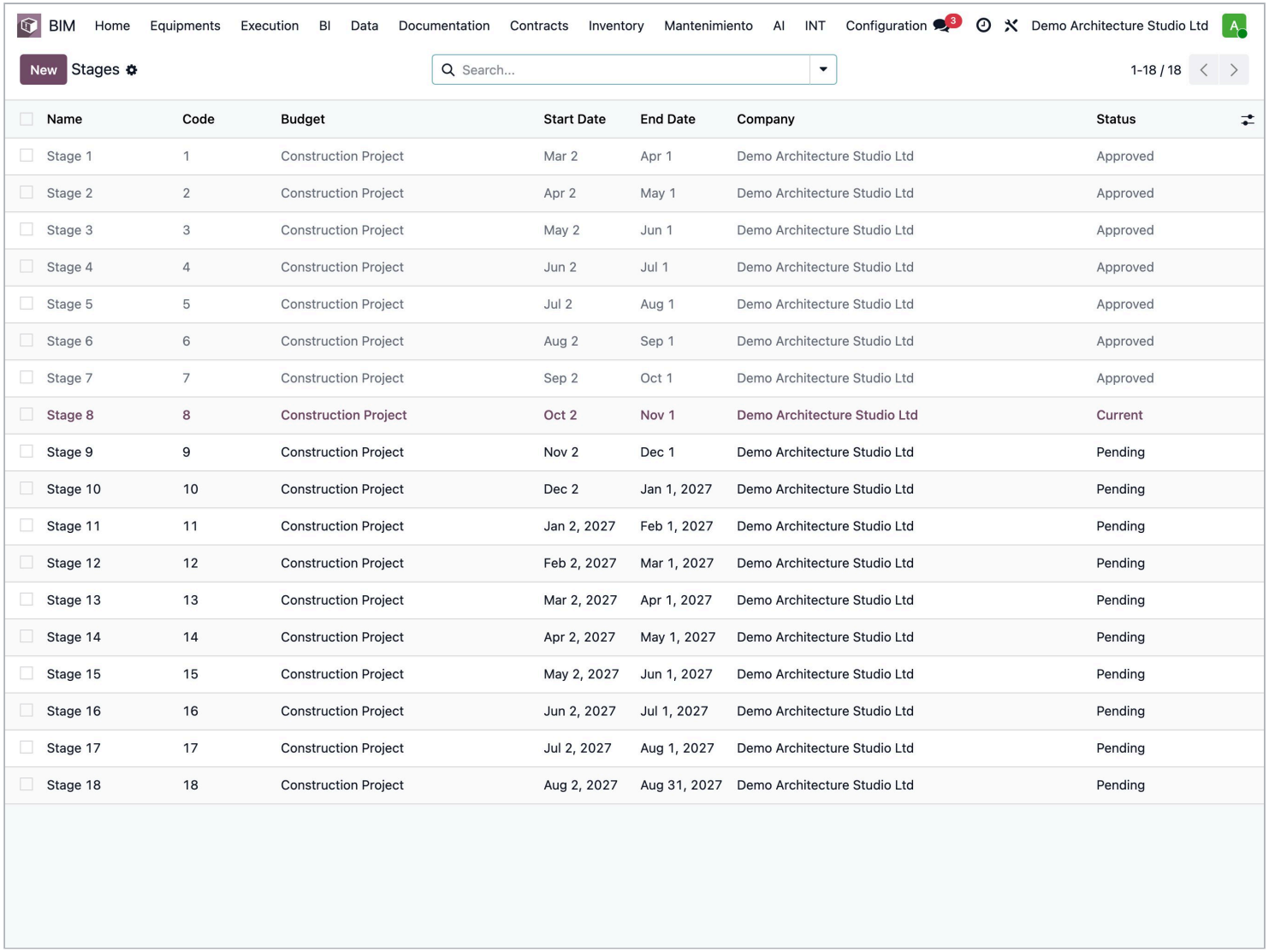
Only one stage is **Current**. When you approve it, the next one takes over.



Stage generation wizard.

06 The stage calendar

The list is under Home › Certifications › Stages.

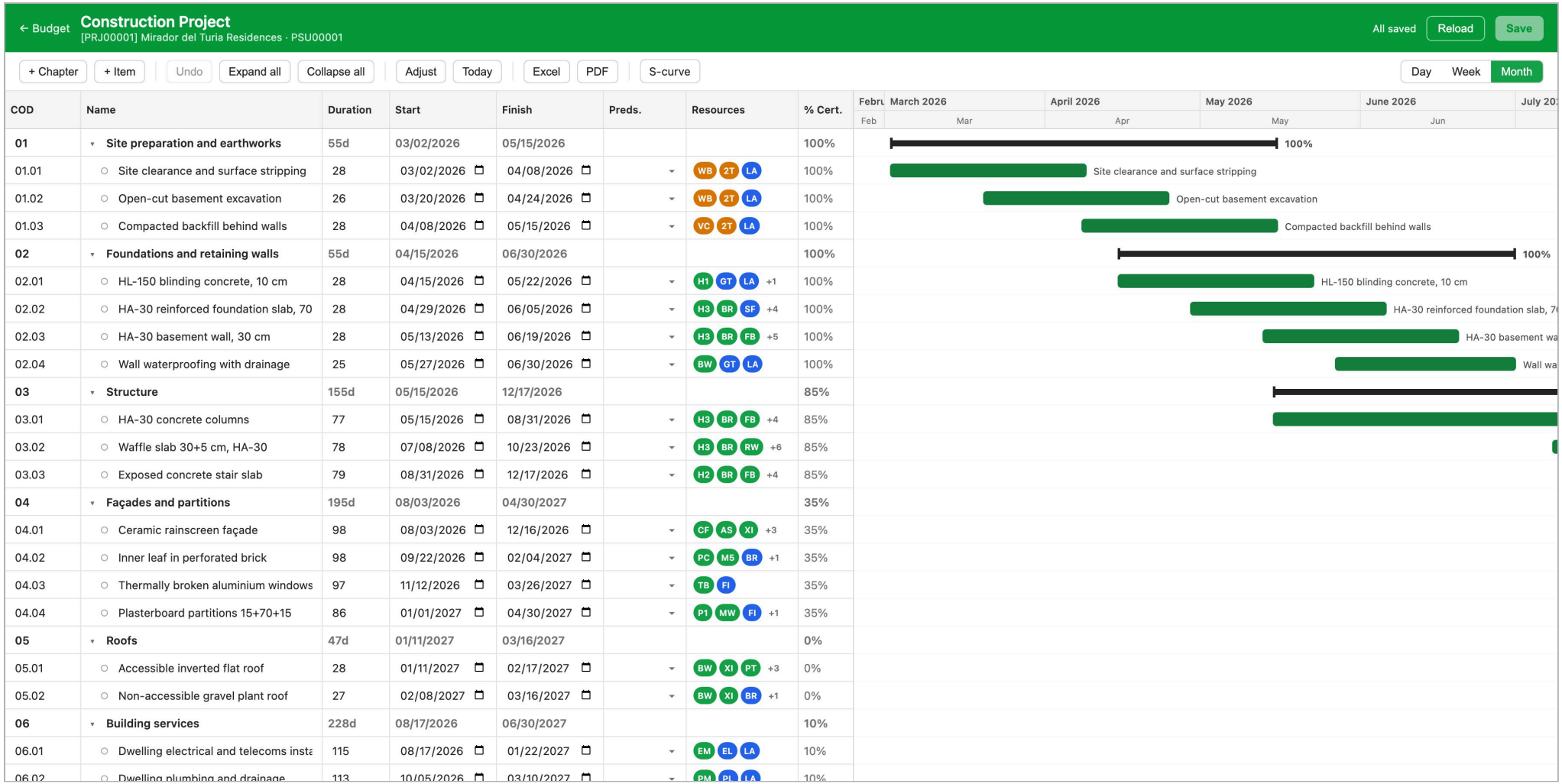


Name	Code	Budget	Start Date	End Date	Company	Status
Stage 1	1	Construction Project	Mar 2	Apr 1	Demo Architecture Studio Ltd	Approved
Stage 2	2	Construction Project	Apr 2	May 1	Demo Architecture Studio Ltd	Approved
Stage 3	3	Construction Project	May 2	Jun 1	Demo Architecture Studio Ltd	Approved
Stage 4	4	Construction Project	Jun 2	Jul 1	Demo Architecture Studio Ltd	Approved
Stage 5	5	Construction Project	Jul 2	Aug 1	Demo Architecture Studio Ltd	Approved
Stage 6	6	Construction Project	Aug 2	Sep 1	Demo Architecture Studio Ltd	Approved
Stage 7	7	Construction Project	Sep 2	Oct 1	Demo Architecture Studio Ltd	Approved
Stage 8	8	Construction Project	Oct 2	Nov 1	Demo Architecture Studio Ltd	Current
Stage 9	9	Construction Project	Nov 2	Dec 1	Demo Architecture Studio Ltd	Pending
Stage 10	10	Construction Project	Dec 2	Jan 1, 2027	Demo Architecture Studio Ltd	Pending
Stage 11	11	Construction Project	Jan 2, 2027	Feb 1, 2027	Demo Architecture Studio Ltd	Pending
Stage 12	12	Construction Project	Feb 2, 2027	Mar 1, 2027	Demo Architecture Studio Ltd	Pending
Stage 13	13	Construction Project	Mar 2, 2027	Apr 1, 2027	Demo Architecture Studio Ltd	Pending
Stage 14	14	Construction Project	Apr 2, 2027	May 1, 2027	Demo Architecture Studio Ltd	Pending
Stage 15	15	Construction Project	May 2, 2027	Jun 1, 2027	Demo Architecture Studio Ltd	Pending
Stage 16	16	Construction Project	Jun 2, 2027	Jul 1, 2027	Demo Architecture Studio Ltd	Pending
Stage 17	17	Construction Project	Jul 2, 2027	Aug 1, 2027	Demo Architecture Studio Ltd	Pending
Stage 18	18	Construction Project	Aug 2, 2027	Aug 31, 2027	Demo Architecture Studio Ltd	Pending

The project's 18 stages: seven approved, one current and ten pending.

06 Gantt schedule

Opens with the budget's **Gantt** button. You can change durations, dates and predecessors in the table or by dragging the bars, and add chapters and items without leaving.



COD	Name	Duration	Start	Finish	Preds.	Resources	% Cert.
01	Site preparation and earthworks	55d	03/02/2026	05/15/2026			100%
01.01	Site clearance and surface stripping	28	03/02/2026	04/08/2026		WB 2T LA	100%
01.02	Open-cut basement excavation	26	03/20/2026	04/24/2026		WB 2T LA	100%
01.03	Compacted backfill behind walls	28	04/08/2026	05/15/2026		VC 2T LA	100%
02	Foundations and retaining walls	55d	04/15/2026	06/30/2026			100%
02.01	HL-150 blinding concrete, 10 cm	28	04/15/2026	05/22/2026		H1 GT LA +1	100%
02.02	HA-30 reinforced foundation slab, 70	28	04/29/2026	06/05/2026		H3 BR SF +4	100%
02.03	HA-30 basement wall, 30 cm	28	05/13/2026	06/19/2026		H3 BR FB +5	100%
02.04	Wall waterproofing with drainage	25	05/27/2026	06/30/2026		BW GT LA	100%
03	Structure	155d	05/15/2026	12/17/2026			85%
03.01	HA-30 concrete columns	77	05/15/2026	08/31/2026		H3 BR FB +4	85%
03.02	Waffle slab 30+5 cm, HA-30	78	07/08/2026	10/23/2026		H3 BR RW +6	85%
03.03	Exposed concrete stair slab	79	08/31/2026	12/17/2026		H2 BR FB +4	85%
04	Façades and partitions	195d	08/03/2026	04/30/2027			35%
04.01	Ceramic rainscreen façade	98	08/03/2026	12/16/2026		CF AS XI +3	35%
04.02	Inner leaf in perforated brick	98	09/22/2026	02/04/2027		PC M5 BR +1	35%
04.03	Thermally broken aluminium windows	97	11/12/2026	03/26/2027		TB FI	35%
04.04	Plasterboard partitions 15+70+15	86	01/01/2027	04/30/2027		P1 MW FI +1	35%
05	Roofs	47d	01/11/2027	03/16/2027			0%
05.01	Accessible inverted flat roof	28	01/11/2027	02/17/2027		BW XI PT +3	0%
05.02	Non-accessible gravel plant roof	27	02/08/2027	03/16/2027		BW XI BR +1	0%
06	Building services	228d	08/17/2026	06/30/2027			10%
06.01	Dwelling electrical and telecoms insta	115	08/17/2026	01/22/2027		EM EL LA	10%
06.02	Dwelling plumbing and drainage	113	10/05/2026	03/10/2027		PM PL LA	10%

Project schedule, opened with the budget's Gantt button. The % Cert. column updates with what has been certified.

06 Working with the Gantt

The toolbar

BUTTON	FUNCTION
+ Chapter, + Item	Add concepts to the budget
Undo	Reverts the last change
Expand, Collapse	Open or close chapters
Adjust	Reschedules items by chaining them
Today	Jumps to the current date
Excel, PDF	Export the schedule
S-curve	Opens the planned vs certified curve
Day, Week, Month	Change the scale

WARNING
The **Adjust** button replaces the current predecessors of **all** items. Use it only for a first schedule.

Before scheduling

Check the Type Duration field in the budget's ST tab:

TYPE	DURATION OF EACH ITEM
Date	Set by the start and end dates
Performance	Calculated from productivity
Manual	You type it

COMMON TRAP
With **Type Duration** set to Performance and items with no productivity value, durations come out as zero. If you only want to work with dates, choose Date.

Remember to press Save at the top right: Gantt changes are not applied until then.

06 S-curve

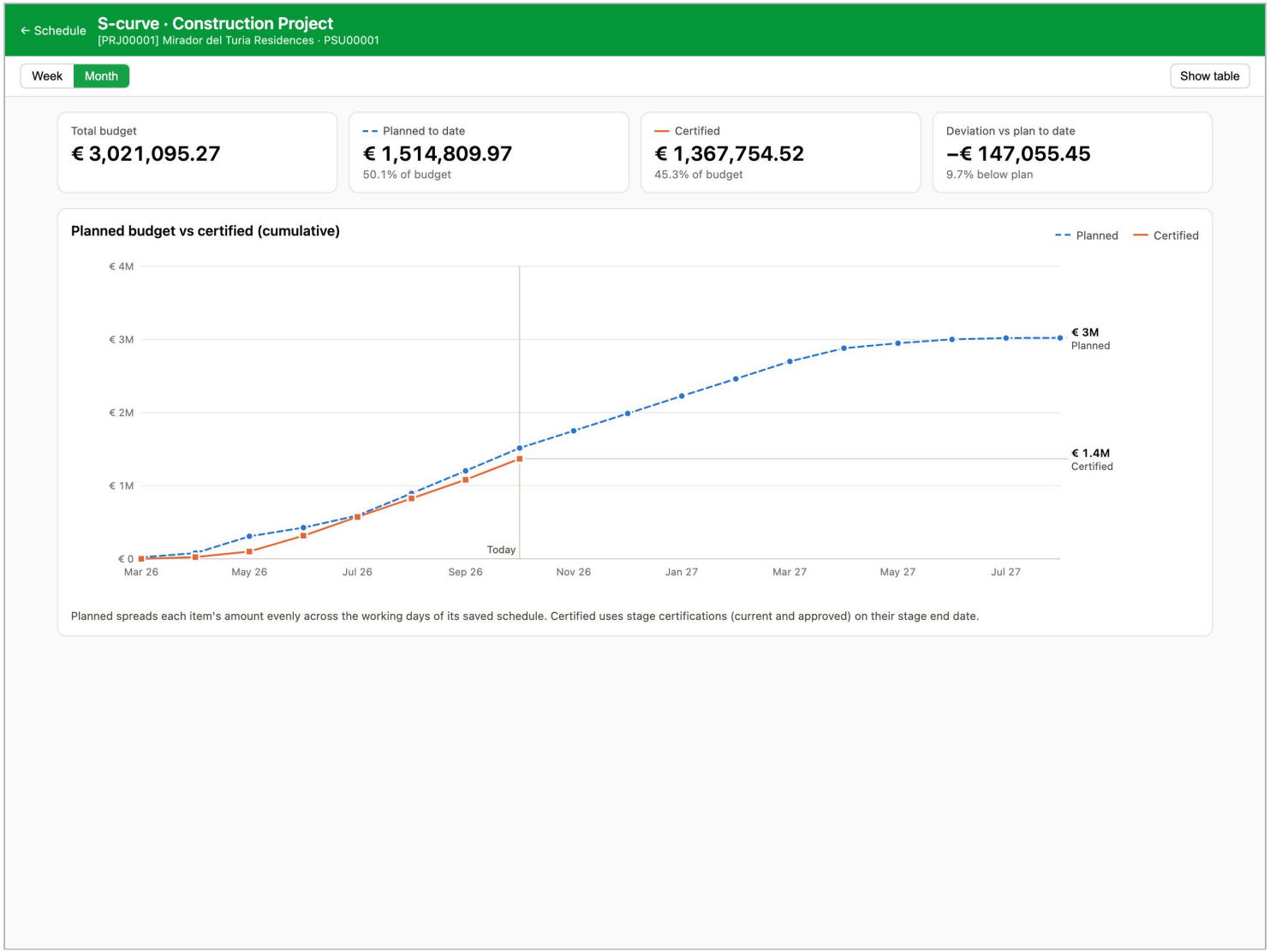
Compares planned against certified, accumulated.

PLANNED TO DATE	CERTIFIED
€1.51M	€1.37M

The dashed line comes from the saved schedule: it spreads each item's amount over its working days. The solid line uses the certifications of current and approved stages.

In the sample, on 30 October, the project is **9.7% below plan** because the October certification is not closed yet.

> SITE NOTE
> Watch the trend of the curve, not just its last point. A certification still to be closed drags the line down for a few days.



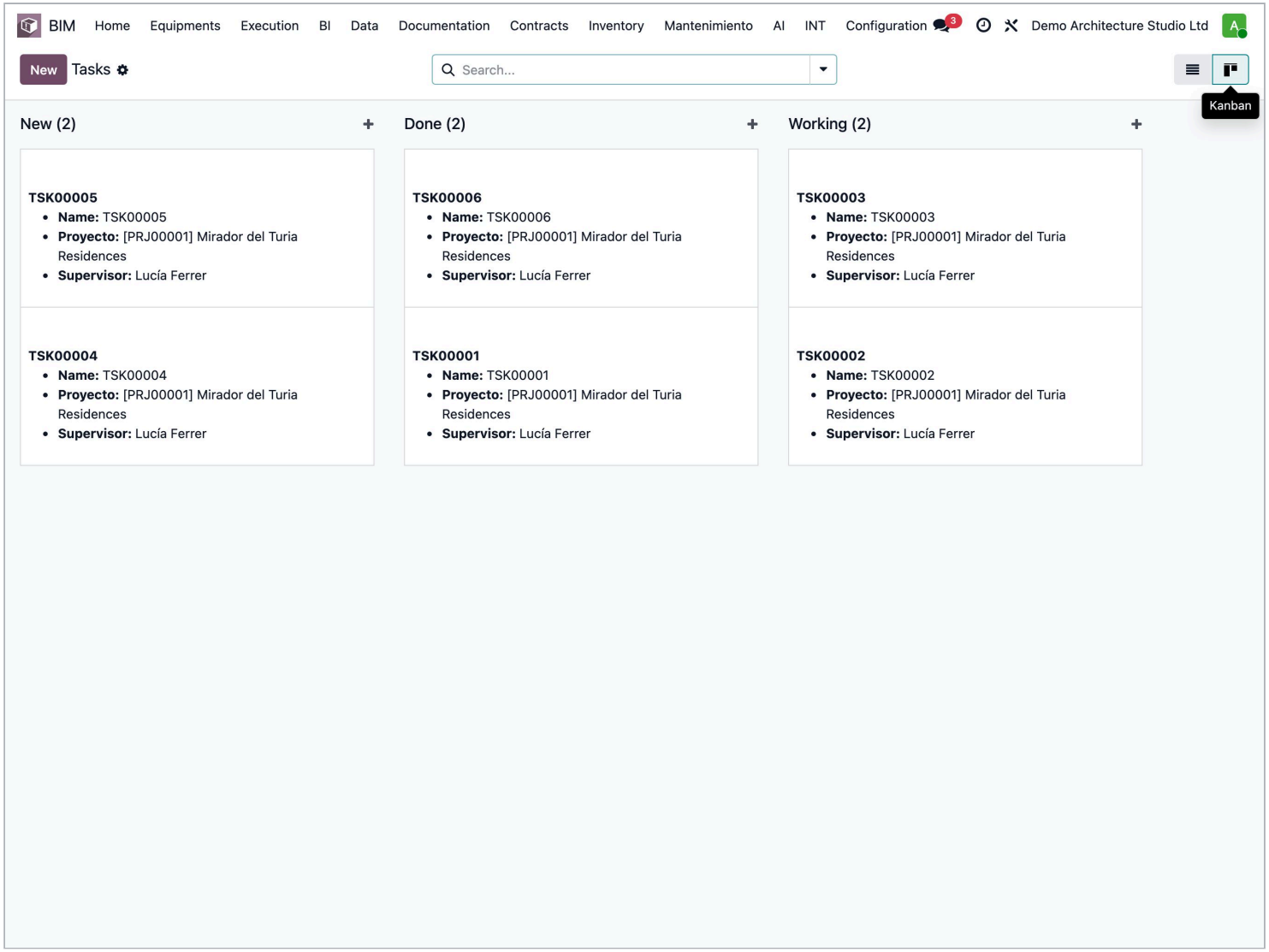
S-curve of the sample project.

06 Tasks

For the technical team's work, under **Documentation › Reporte de Tareas**.

- Assigned to a project, a budget and a manager.
- They move through New, Working and Finished.
- They hold estimated and actual hours.

In the board view you can drag them between columns.

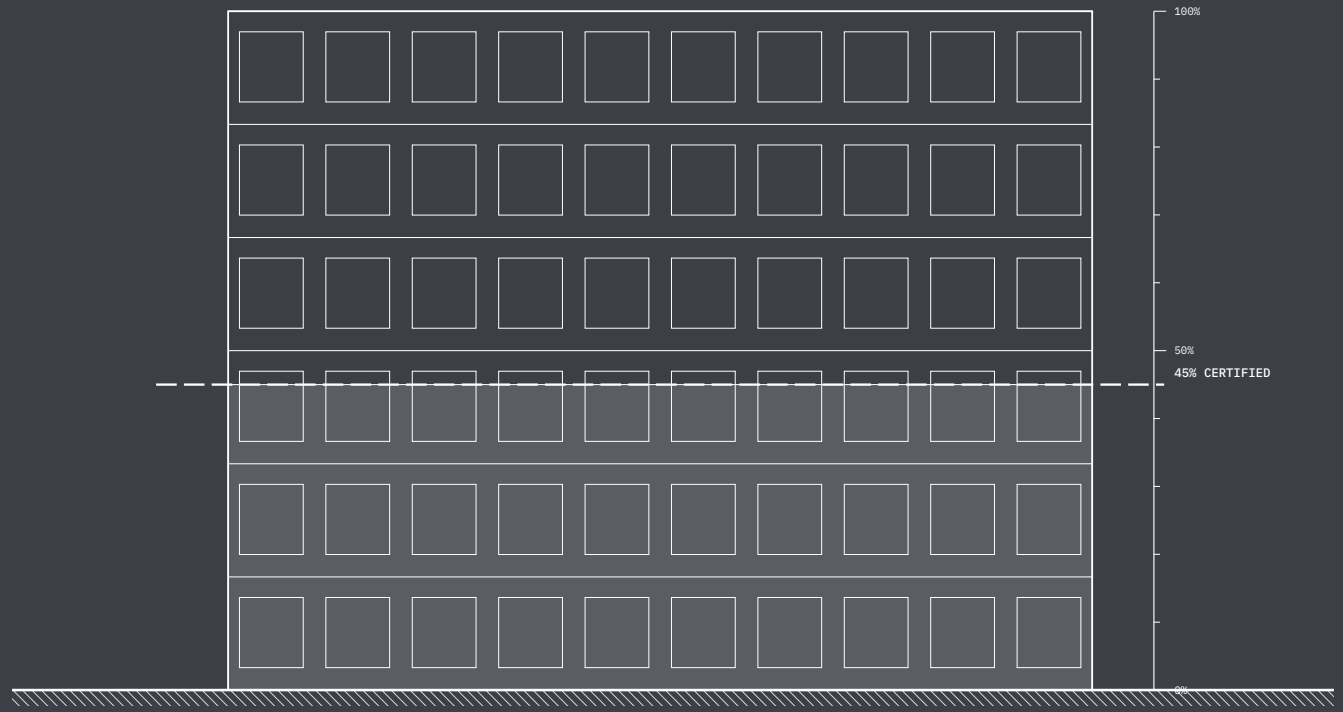


Project tasks in board view.

07

Certification and payment

From the work done on site to the invoice for the client, step by step.



Full workflow
Certify a stage
Certify from the tree
Payment status
Invoicing

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Progress elevation	1:200	07/16

07 The full workflow

Certifying in BIM 2.0 has four milestones, each with its own document:

MILESTONE	DOCUMENT	RESULT
Measure	Certification	Quantities for the stage
Group	Payment Status	Amount to collect, with retention
Invoice	Customer invoice	Draft in accounting
Close	Approved stage	Moves on to the next stage

Certification states

Draft	Loaded	Validated	Certified

It can be cancelled at any time. A certified one can be taken back with **Undo**.

Payment status states

Draft	Validated	Invoiced

Before you start

- The budget must have **stages**, with one Current.
- Its state must allow certifications: the **Allow Certification** option.
- If there are no stages, the software offers to create them on the spot.

WARNING
By default only one certification per stage is allowed. To certify the next month, approve the current stage first.

SITE NOTE
With certification to date you do not need to get it right first time: next month you adjust the accumulated quantity.

07 Certify a stage

1. Go to **Home › Certifications › Certifications** and press **New**.
2. Choose project and budget, and press **Load**.
3. Enter in **CanAct** what was done this period.
4. Press **Validate**, then certify.

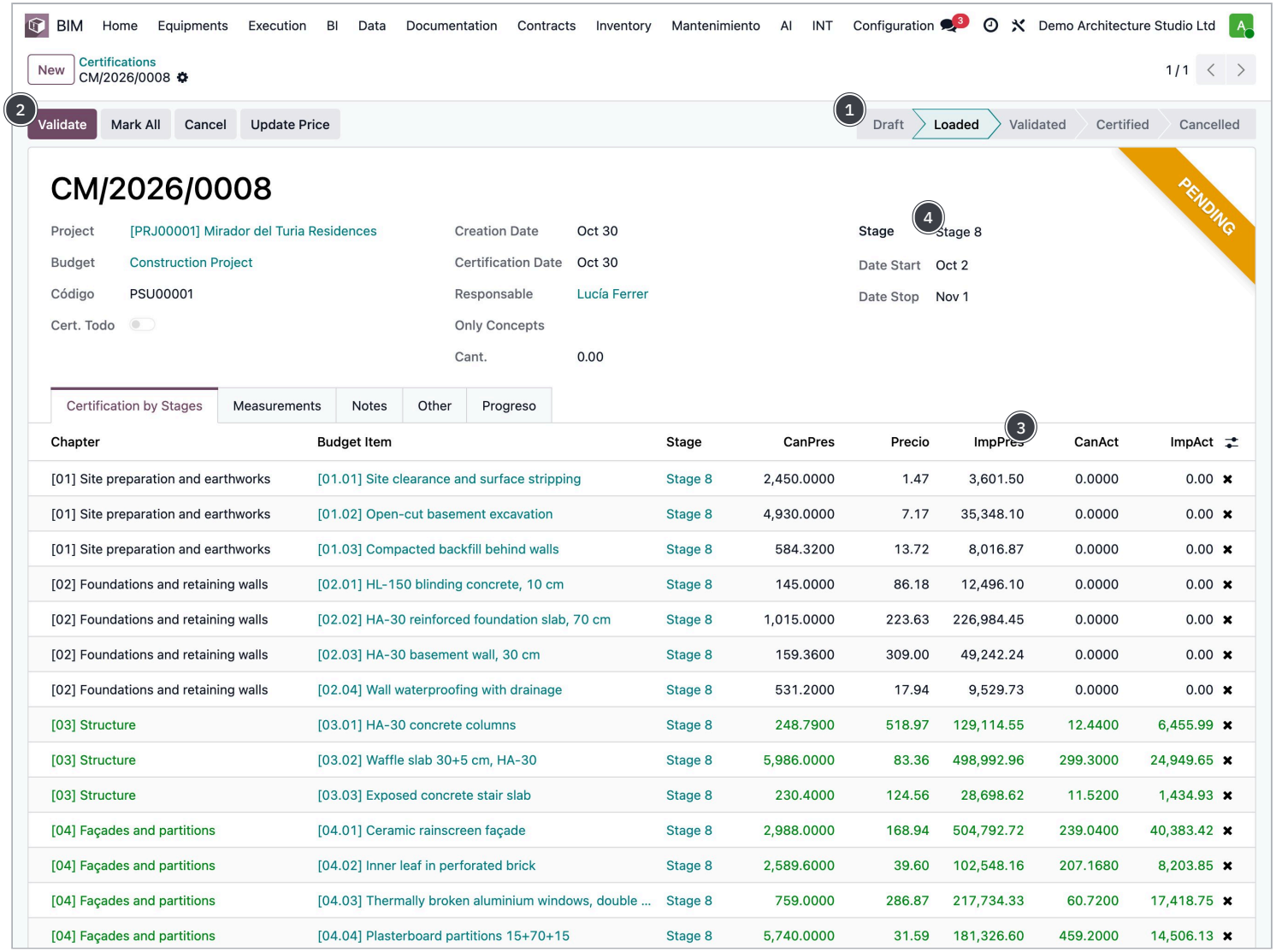
(1) **State** of the certification.

(2) **Actions**: Validate, Mark All, Update Price.

(3) **CanAct**: the quantity for this period.

(4) **Stage** being certified.

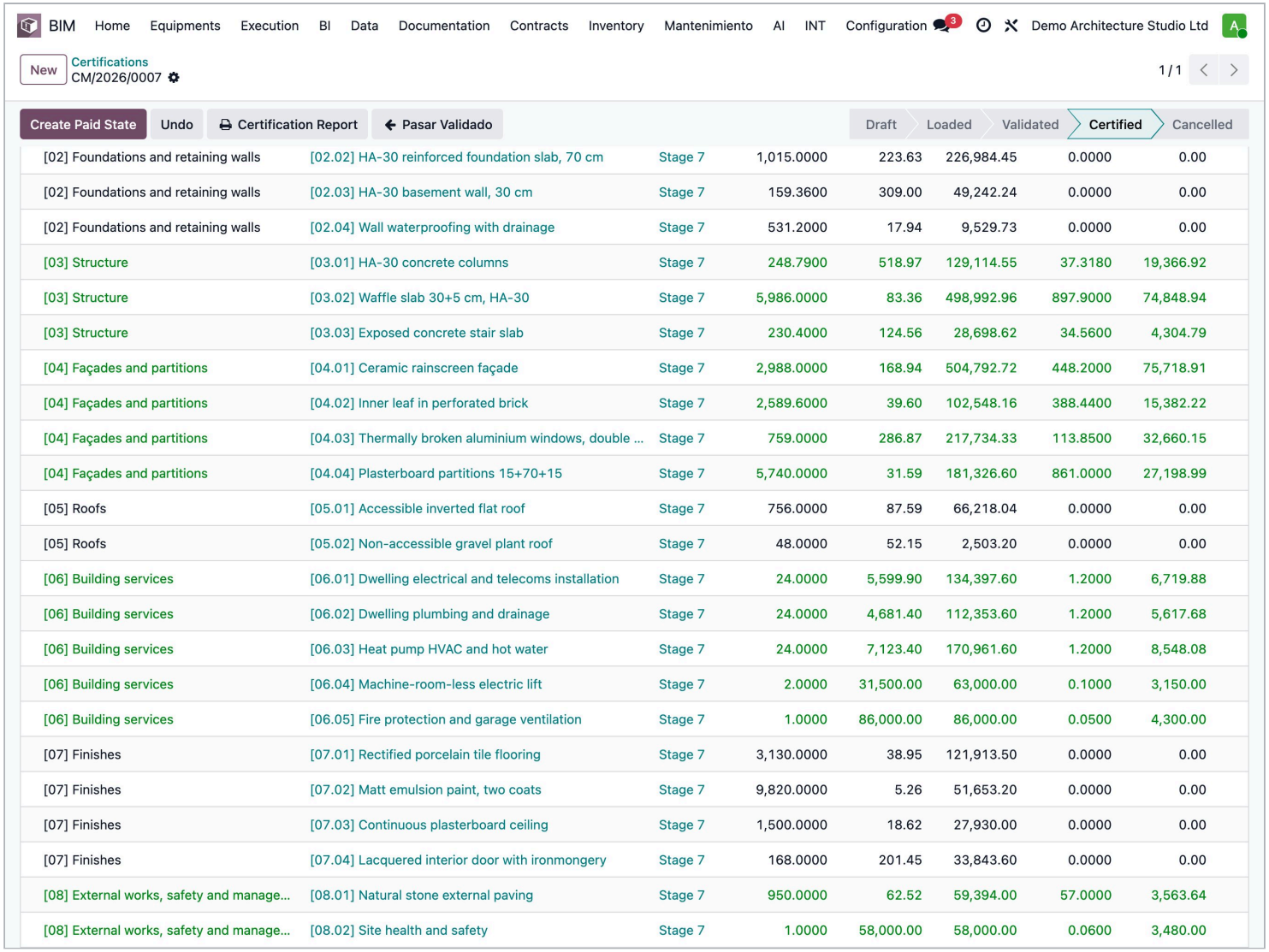
Mark All fills in what is left to certify on each line.



Certification for stage 8, loaded and being edited.

07 Finished certification

Once certified, **Create Paid State**, **Undo** and **Certification Report** appear. The columns are: **CanPres**, budgeted quantity; **ImpPres**, budgeted amount; **CanAct** and **ImpAct**, quantity and amount for this stage.

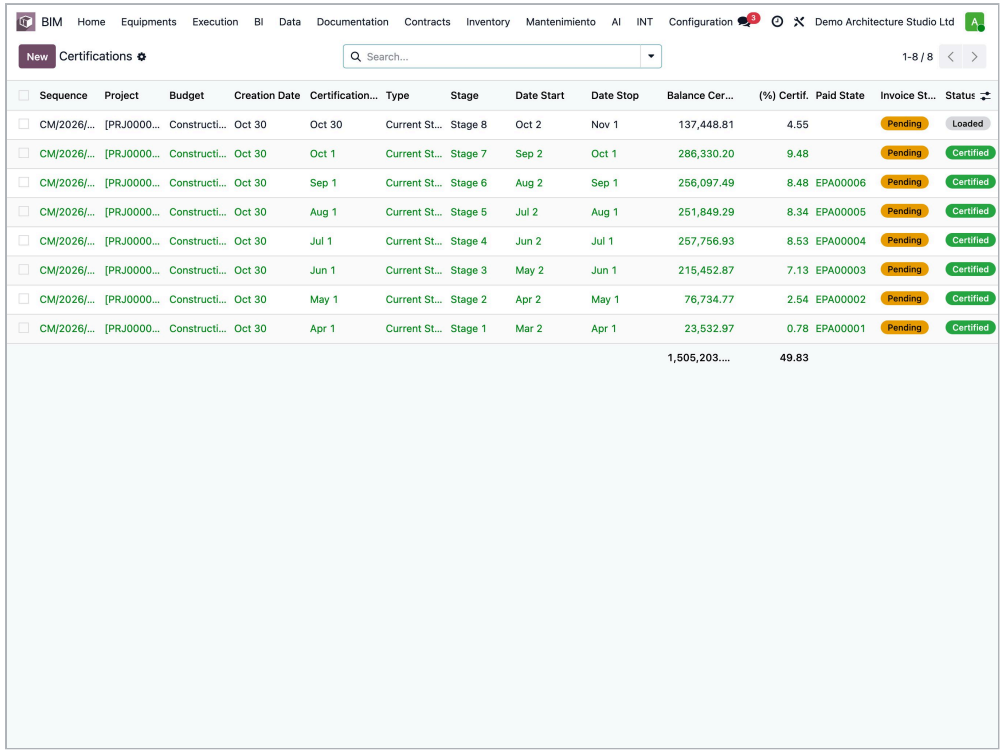


[02] Foundations and retaining walls	[02.02] HA-30 reinforced foundation slab, 70 cm	Stage 7	1,015.0000	223.63	226,984.45	0.0000	0.00
[02] Foundations and retaining walls	[02.03] HA-30 basement wall, 30 cm	Stage 7	159.3600	309.00	49,242.24	0.0000	0.00
[02] Foundations and retaining walls	[02.04] Wall waterproofing with drainage	Stage 7	531.2000	17.94	9,529.73	0.0000	0.00
[03] Structure	[03.01] HA-30 concrete columns	Stage 7	248.7900	518.97	129,114.55	37.3180	19,366.92
[03] Structure	[03.02] Waffle slab 30+5 cm, HA-30	Stage 7	5,986.0000	83.36	498,992.96	897.9000	74,848.94
[03] Structure	[03.03] Exposed concrete stair slab	Stage 7	230.4000	124.56	28,698.62	34.5600	4,304.79
[04] Façades and partitions	[04.01] Ceramic rainscreen façade	Stage 7	2,988.0000	168.94	504,792.72	448.2000	75,718.91
[04] Façades and partitions	[04.02] Inner leaf in perforated brick	Stage 7	2,589.6000	39.60	102,548.16	388.4400	15,382.22
[04] Façades and partitions	[04.03] Thermally broken aluminium windows, double ...	Stage 7	759.0000	286.87	217,734.33	113.8500	32,660.15
[04] Façades and partitions	[04.04] Plasterboard partitions 15+70+15	Stage 7	5,740.0000	31.59	181,326.60	861.0000	27,198.99
[05] Roofs	[05.01] Accessible inverted flat roof	Stage 7	756.0000	87.59	66,218.04	0.0000	0.00
[05] Roofs	[05.02] Non-accessible gravel plant roof	Stage 7	48.0000	52.15	2,503.20	0.0000	0.00
[06] Building services	[06.01] Dwelling electrical and telecoms installation	Stage 7	24.0000	5,599.90	134,397.60	1.2000	6,719.88
[06] Building services	[06.02] Dwelling plumbing and drainage	Stage 7	24.0000	4,681.40	112,353.60	1.2000	5,617.68
[06] Building services	[06.03] Heat pump HVAC and hot water	Stage 7	24.0000	7,123.40	170,961.60	1.2000	8,548.08
[06] Building services	[06.04] Machine-room-less electric lift	Stage 7	2.0000	31,500.00	63,000.00	0.1000	3,150.00
[06] Building services	[06.05] Fire protection and garage ventilation	Stage 7	1.0000	86,000.00	86,000.00	0.0500	4,300.00
[07] Finishes	[07.01] Rectified porcelain tile flooring	Stage 7	3,130.0000	38.95	121,913.50	0.0000	0.00
[07] Finishes	[07.02] Matt emulsion paint, two coats	Stage 7	9,820.0000	5.26	51,653.20	0.0000	0.00
[07] Finishes	[07.03] Continuous plasterboard ceiling	Stage 7	1,500.0000	18.62	27,930.00	0.0000	0.00
[07] Finishes	[07.04] Lacquered interior door with ironmongery	Stage 7	168.0000	201.45	33,843.60	0.0000	0.00
[08] External works, safety and manage...	[08.01] Natural stone external paving	Stage 7	950.0000	62.52	59,394.00	57.0000	3,563.64
[08] External works, safety and manage...	[08.02] Site health and safety	Stage 7	1.0000	58,000.00	58,000.00	0.0600	3,480.00

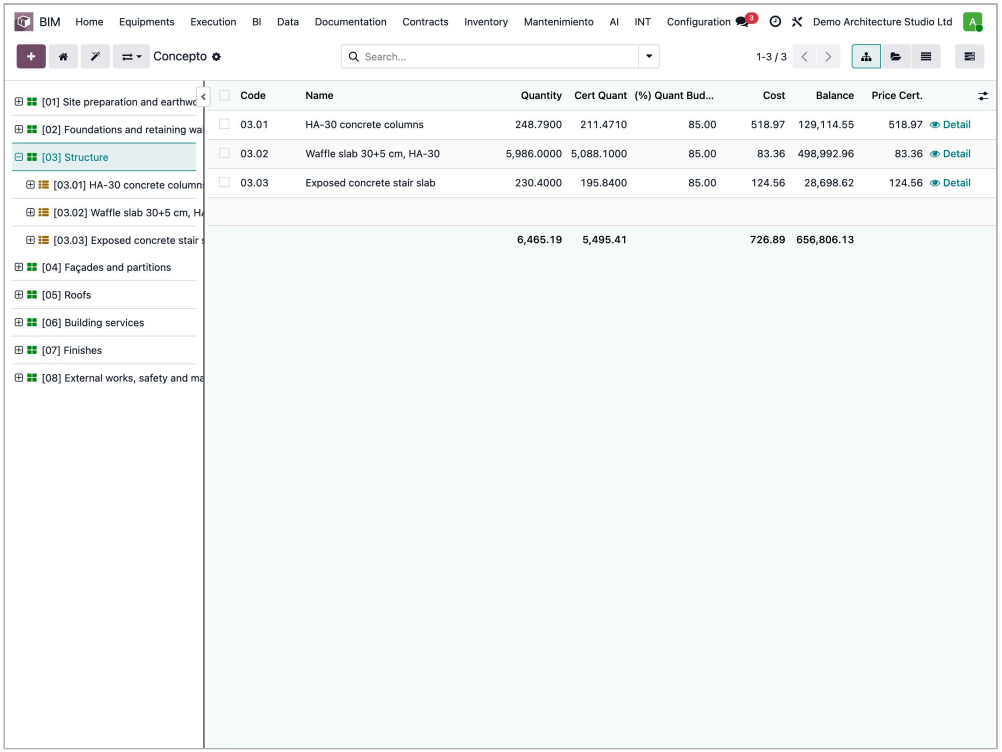
Certification 7 finished. Green rows are the items with a quantity in this stage.

07 Tracking certifications

The list footer adds up what has been certified. You can also certify from the tree: select items or chapters, right-click and choose **Certify**.



Certification list with amount, % of budget and linked payment status.



Tree in Certification mode: accumulated quantities and % by item.

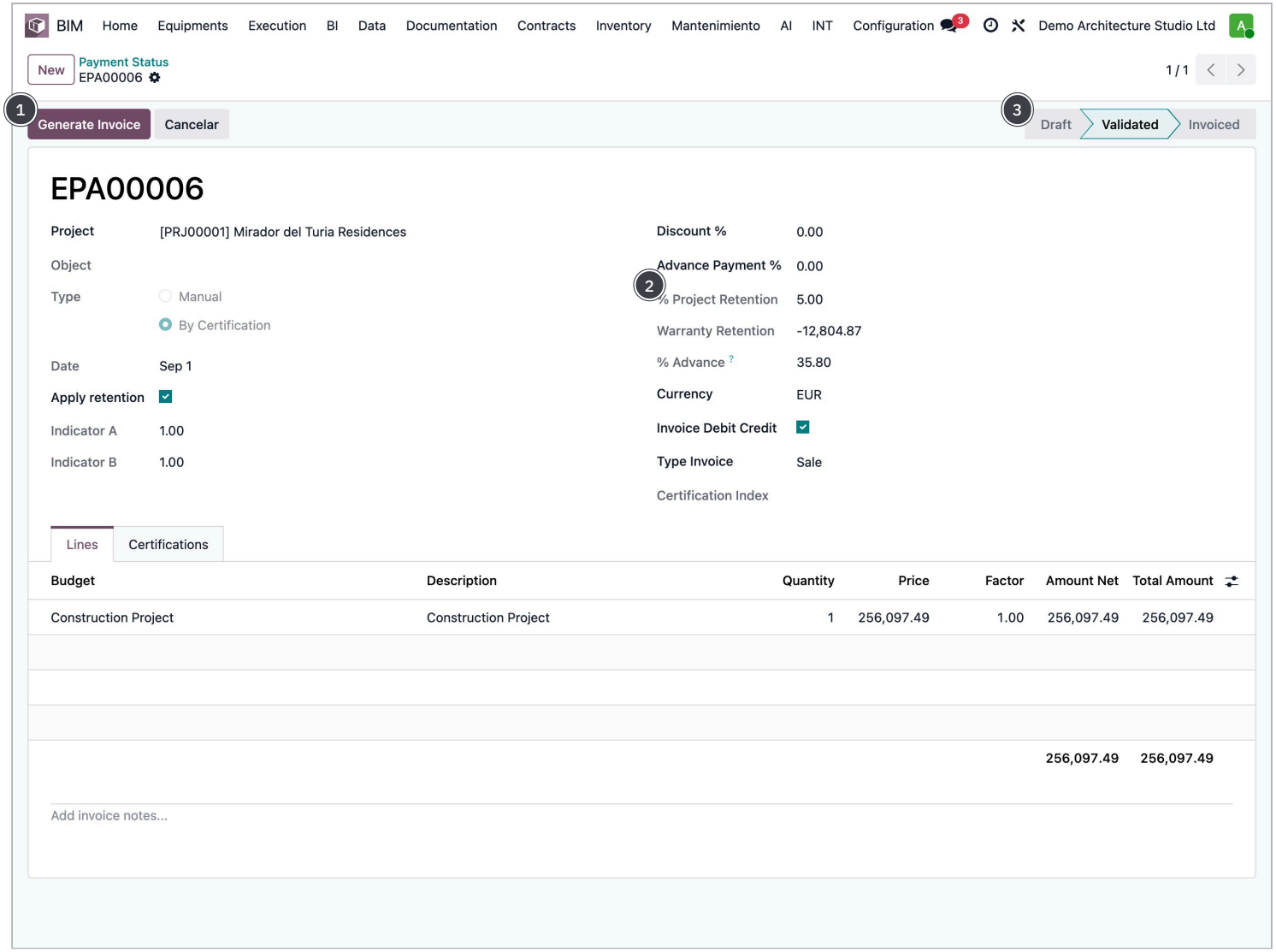
07 Payment status

It turns what was certified into an amount to collect. Create it with **Create Paid State** from the certification.

1. **Generate Invoice** creates the customer invoice.
2. **Retention** according to the project %.
3. **State** of the document.

```
Certification 6 · €256,097.49
5% retention · −€12,804.87
```

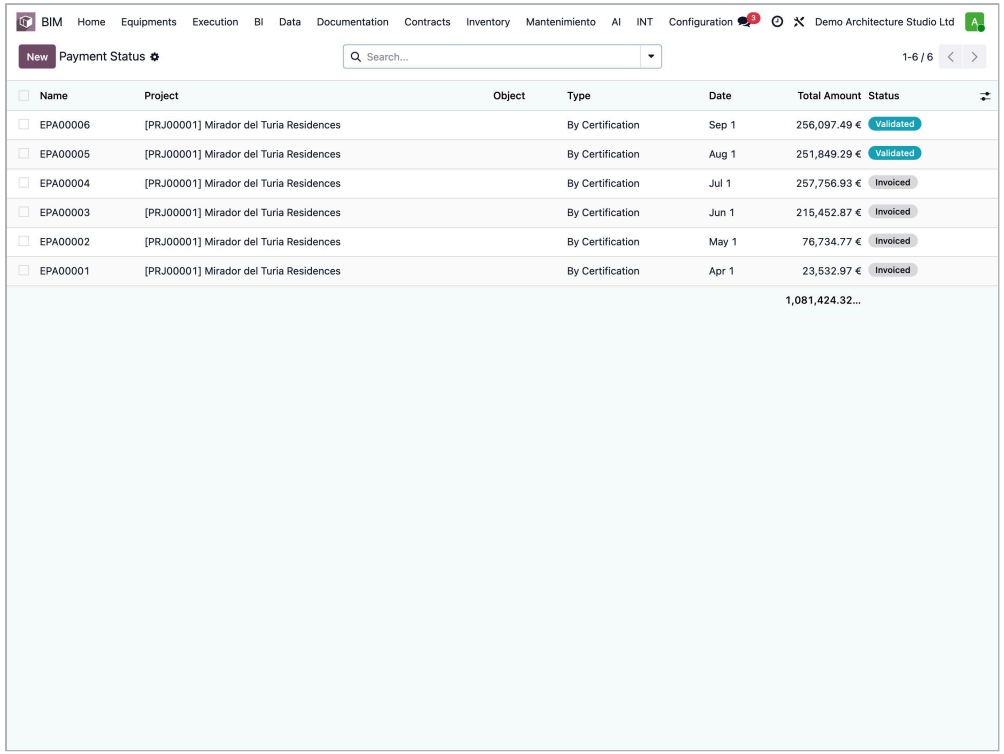
Check the retention checkbox and the discount and payment on account fields, which come from the project record.



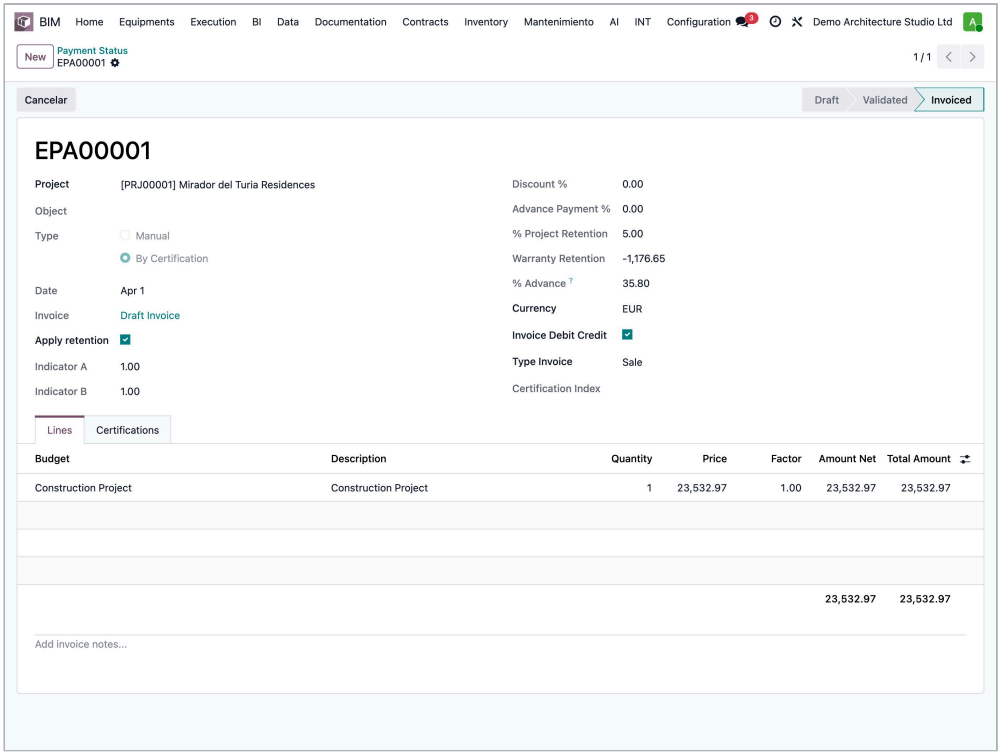
Payment status EPA00006, validated and ready to invoice.

07 From payment status to invoice

When you press **Generate Invoice**, the status changes to Invoiced and a draft customer invoice is created, which accounts then review and post.

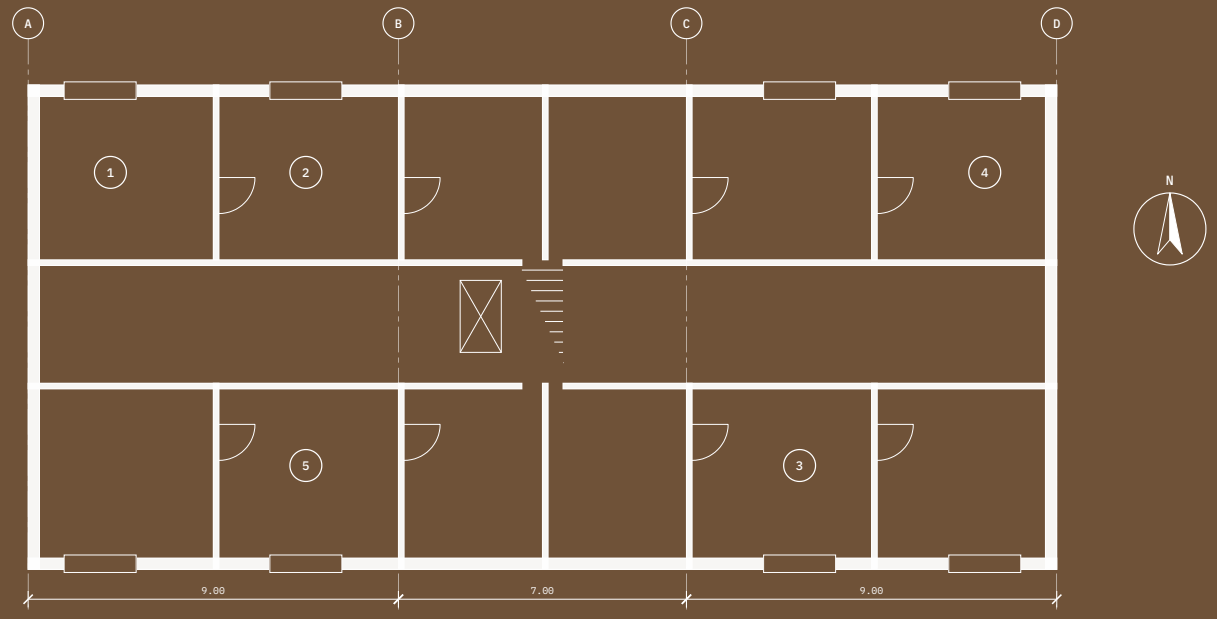


Payment statuses: the first four invoiced, the last two validated.



After invoicing, the Invoice field links to the accounting draft.

08



Site control

Day-to-day work: reports, queries, quality and documents, all linked to their project.

Daily reports
RFIs
Checklists
Quality plan
Documents
Change orders

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Typical floor plan	1:100	08/16

08 Daily reports

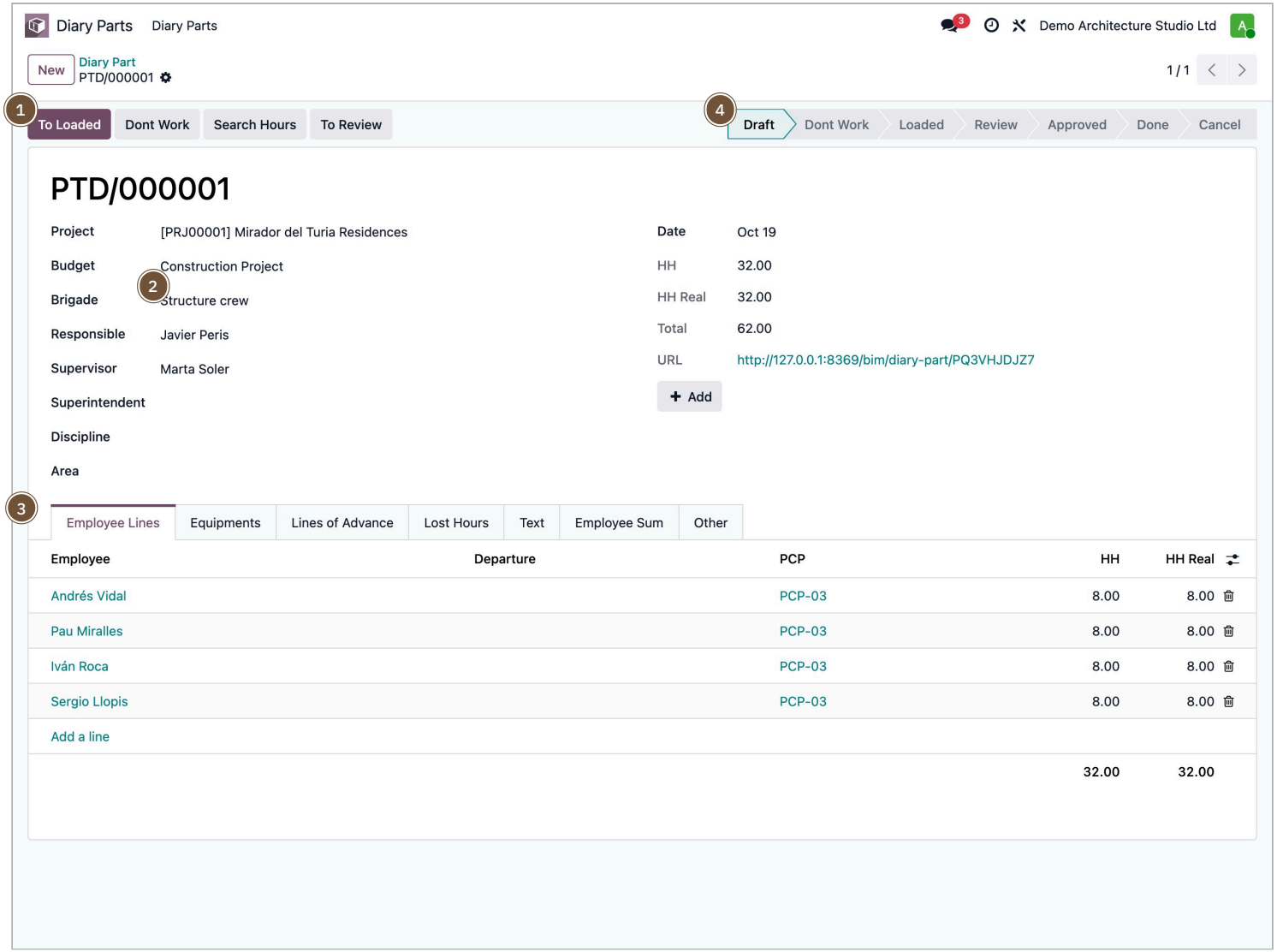
They record what each crew did in a day. They also have their own **Diary Parts** app.

1. **Report actions**.
2. **Brigade**: choosing it loads its staff and managers.
3. **Tabs**: employees, equipment, progress, lost hours.
4. **State** of the report.

Draft	Loaded	Review	Approved	Done

If no work was done that day, press **Dont Work**.

> **WARNING**
> To approve, planned hours (HH) and actual hours (HH Real) must match. This is controlled by the **blok_aprove_part** setting.



Daily report for the structure crew.

08 RFIs: formal queries

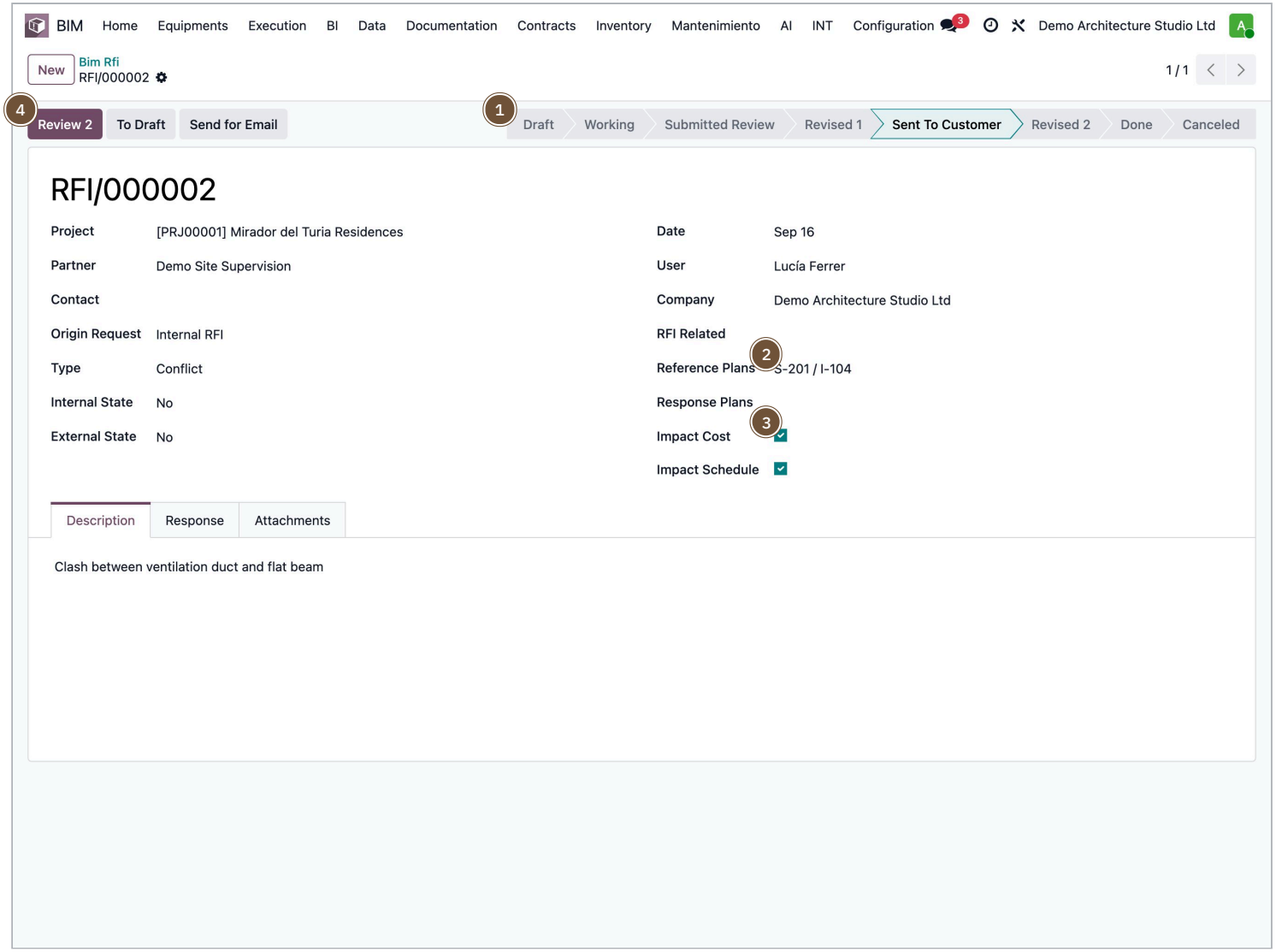
An **RFI** (Request for Information) records a technical query, its answer and its impact in writing.

1. **State** of the query.
2. **Reference Plans** affected.
3. **Impact** on cost and schedule.
4. **Actions**, including send by email.

Draft	Working	Submitted Review
Revised 1	**Sent To Customer**	Revised 2
Done		

The answer goes in the **Response** tab and files in **Attachments**.

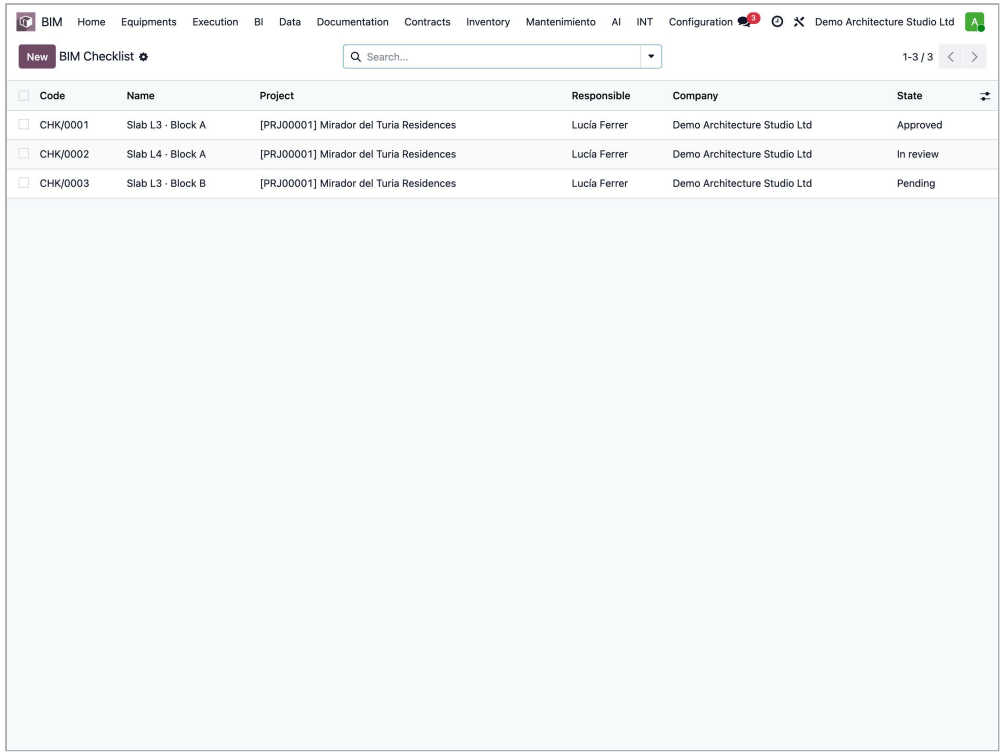
> SITE NOTE
> Always tick the impacts. At project close, they justify each deviation.



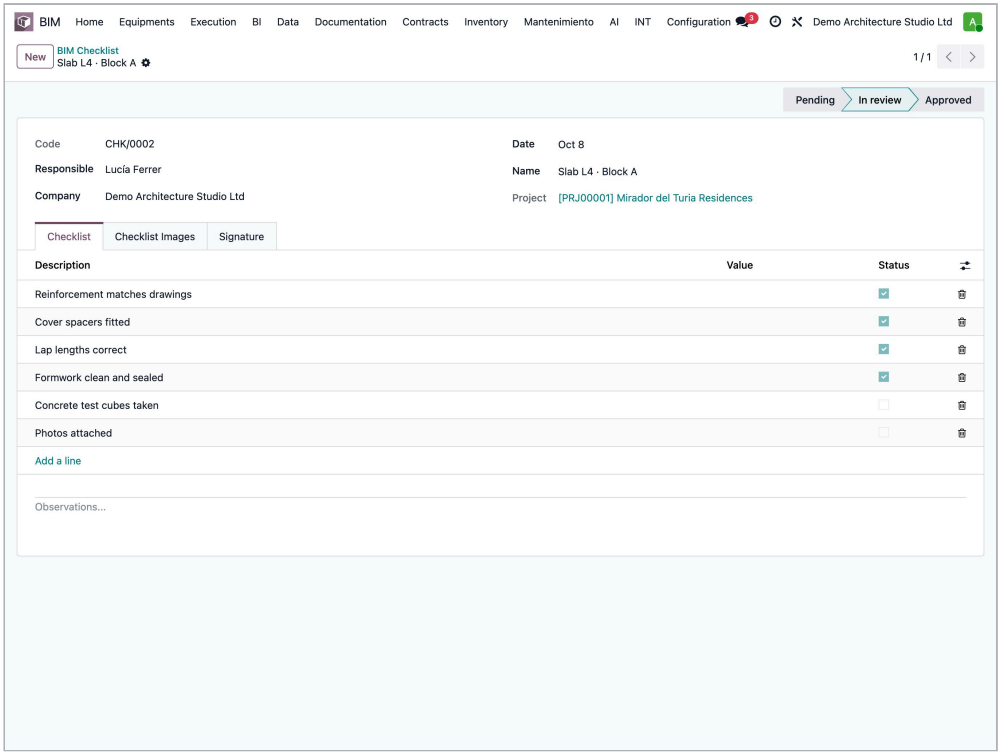
RFI about a clash between a duct and a flat beam.

08 Checklists

Create a template under **Data › Generals** and load it from the project's **Checklist** button. States are defined under **Configuration › States** and must exist before the first list.



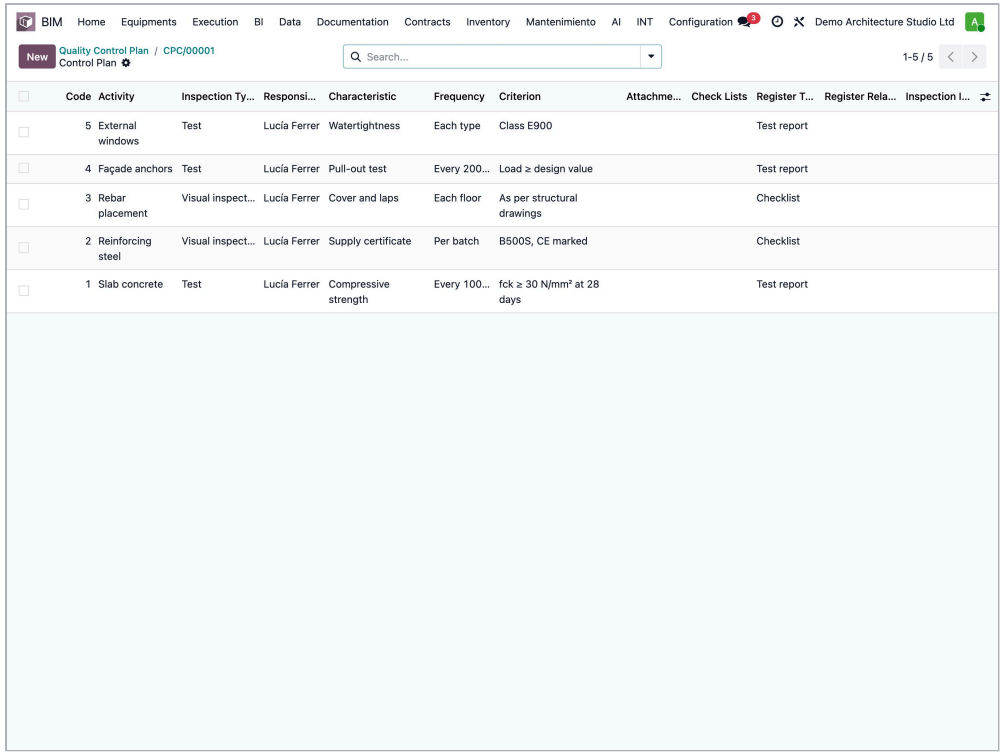
One list per inspection, with its state.



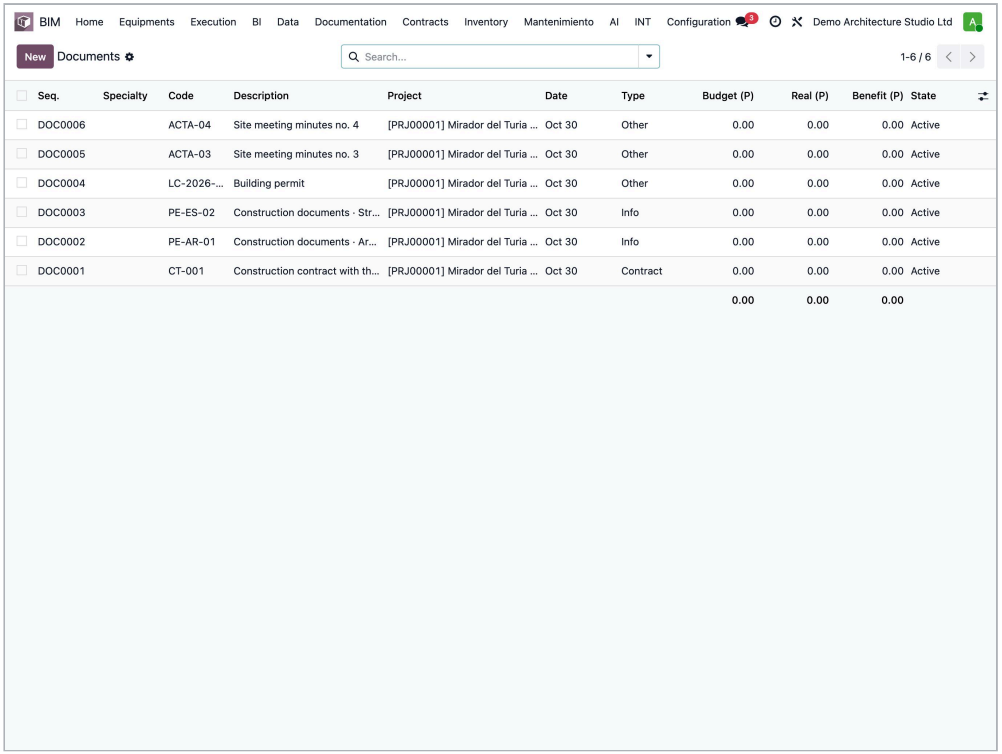
Each check is ticked during review. Photos and a signature can be added.

08 Quality plan and documents

The **quality plan** sets what is checked, how often and against which criterion. **Documents** centralise contracts, permits and minutes, and can have revisions, an expiry date and an approval state.



Control plan: activity, characteristic, frequency and acceptance criterion.

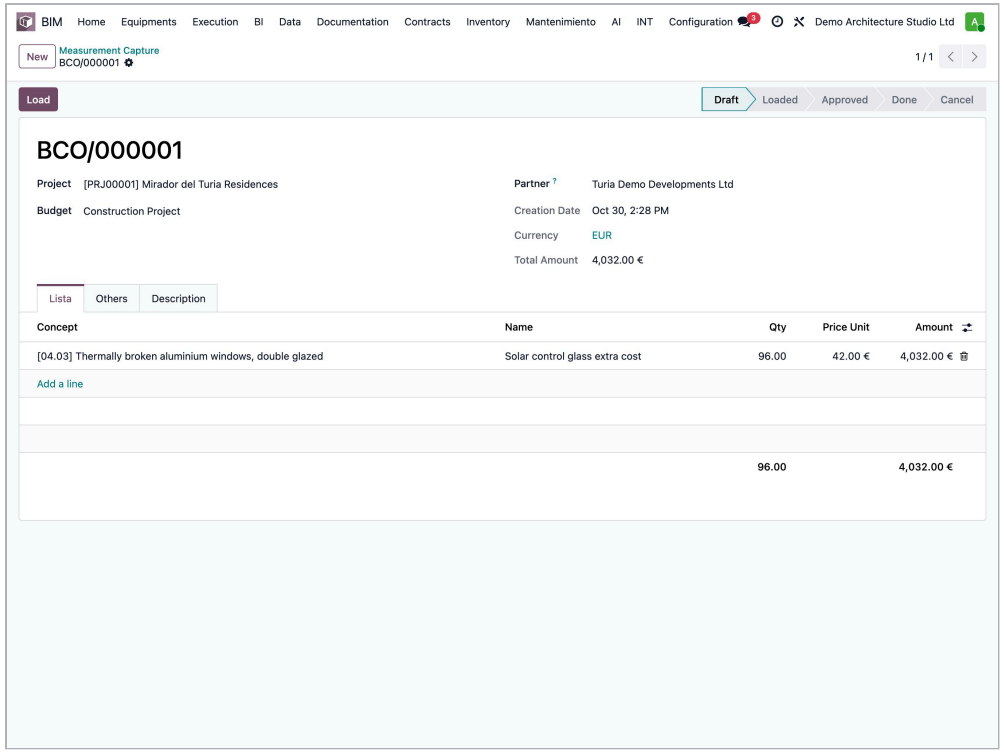


Project documents, with code, type and state.

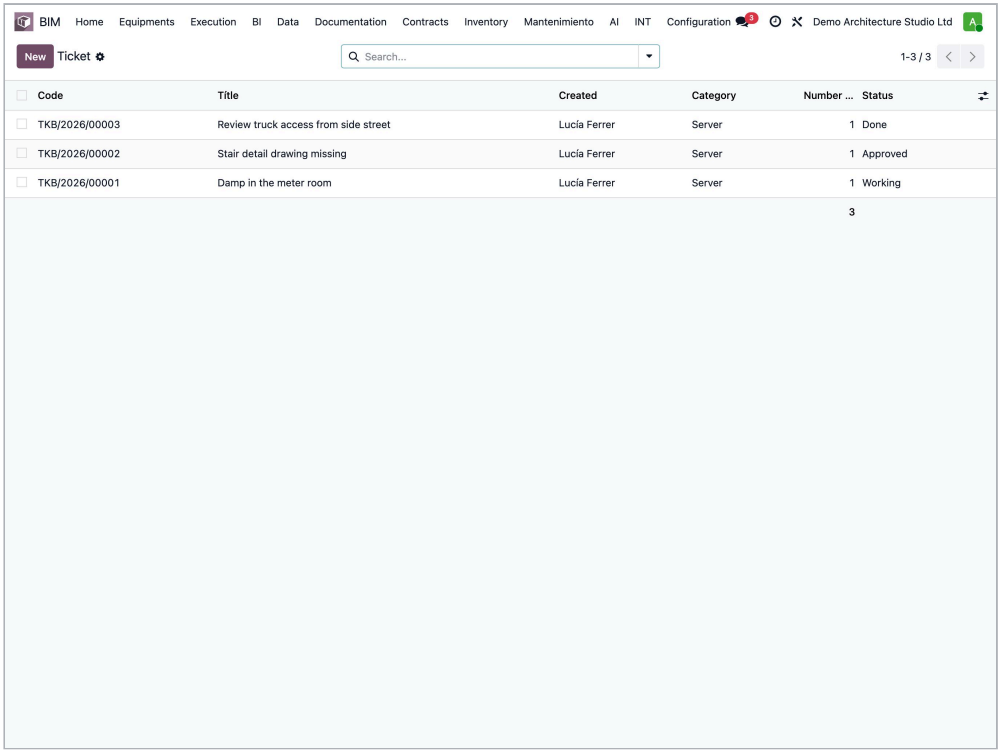
08 Change orders and tickets

A **change order** records a variation with its amount and client. **Tickets** handle issues with states and an owner.

Important: a change order only records. It does not change the budget, which must be updated separately.



Change order: concept affected, quantity, price and amount.

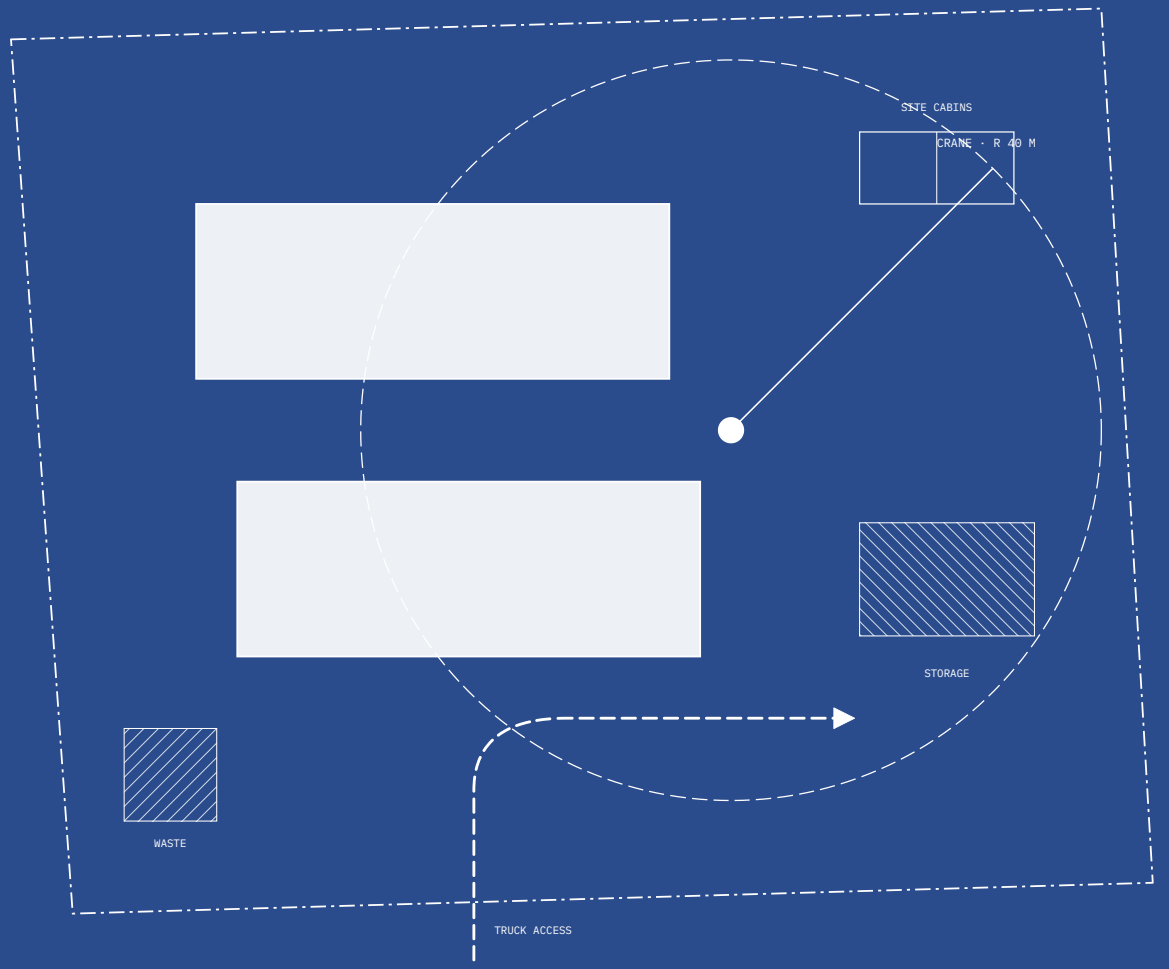


Project issue tickets.

09

Purchasing and costs

What gets requested, what gets bought, and how each invoice reaches the project. Includes the analytic account rule.



Material requests
Purchase orders
Supplier invoices
The analytic account

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Site layout	1:500	09/16

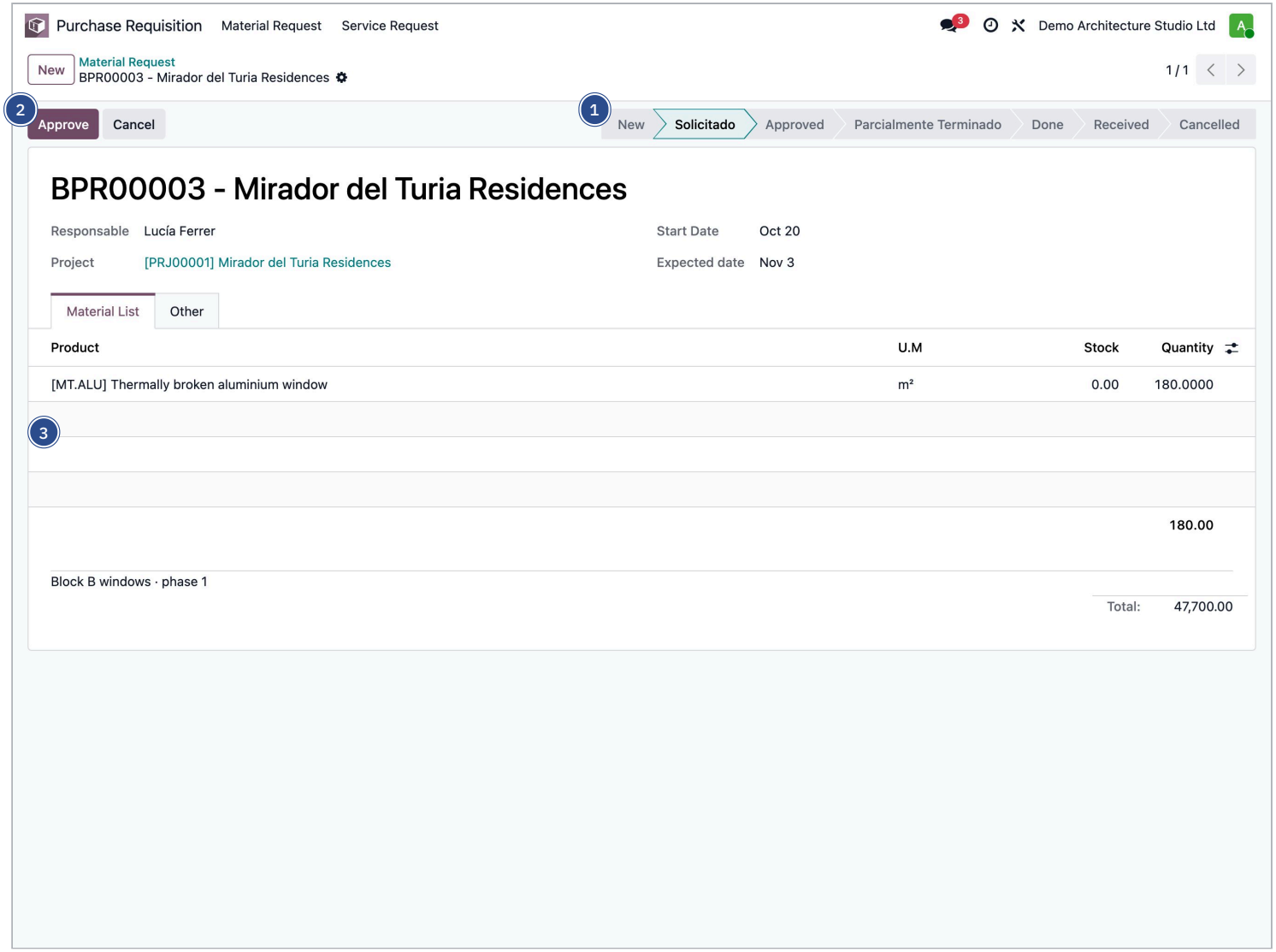
09 Material requests

The site manager requests and purchasing handles it. They are under **Inventory** and in the requisition app.

1. **State**.
2. **Actions** depending on the state.
3. **Material list**.

New	Solicitado	Approved
Parcialmente Terminado	Done	Received

Lines can be entered by hand or loaded from the budget resources.



Window request awaiting approval.

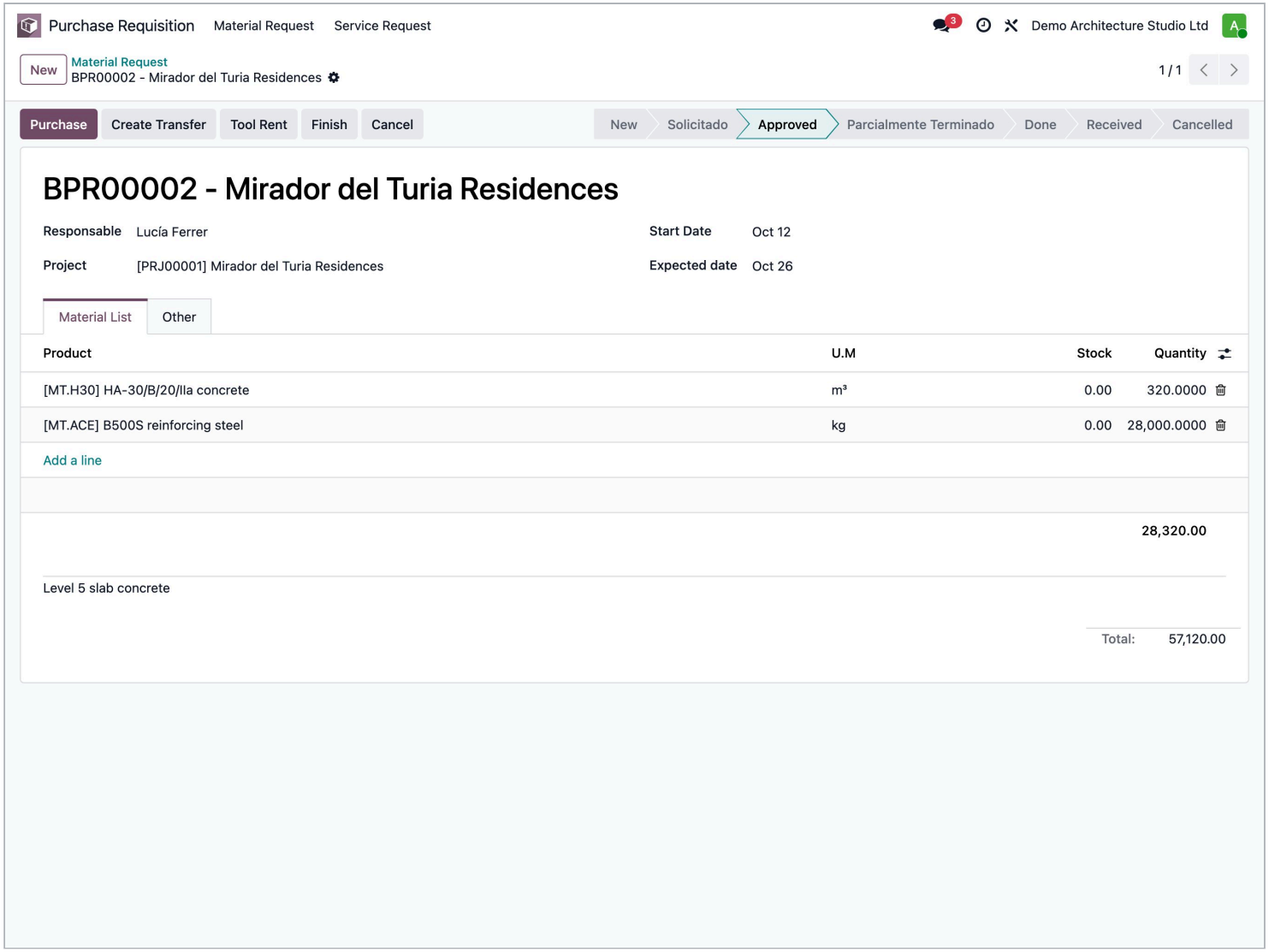
09 From request to order

Once approved, the request offers these actions:

BUTTON	WHAT IT DOES
Purchase	Creates the supplier order
Create Transfer	Supplies from another warehouse
Tool Rent	Creates a rental
Finish	Closes what is outstanding

When you press **Purchase** you assign a supplier to each line. With one supplier, an order is created. With several, a purchase agreement to compare offers.

> **SITE NOTE**
> Approving a request records what was asked for in the budget; cancelling returns it. So you know how much of each resource is left to order.



Approved request, with the available actions.

09 Key rule: no analytic account, no cost

Each project has its own **analytic account**, created automatically with the project. It works like a label: it says which project a cost belongs to.

THE RULE
BIM 2.0 does not read whole invoices. It reads the **lines** that carry the project's analytic account. If a line does not have it, **the cost does not appear in the project**. The software gives no warning.

The three conditions

For a cost to count on the project, all three must be met:

CONDITION	WHERE TO SEE IT
The **line** carries the project's analytic account	Column Analytic
The invoice is **posted**	State Posted
The invoice has **Include for Bim**	Switch in the header

COMMON CASE
Setting the project in the header is not enough. What counts is the analytic account on each line.

Tested on the sample project

A €12,400 crane hire invoice was posted with the project in the header but no analytic account on the line:

PROJECT COST	AMOUNT (€)
Before the invoice	1,295,030.53
After the invoice	1,295,030.53
Difference	**0.00**

How to avoid it

1. When creating the invoice, choose the **Project** in the header first.
2. Add the lines afterwards: the software suggests the analytic account when you choose the product.
3. Show the Analytic column and check it is filled before posting.

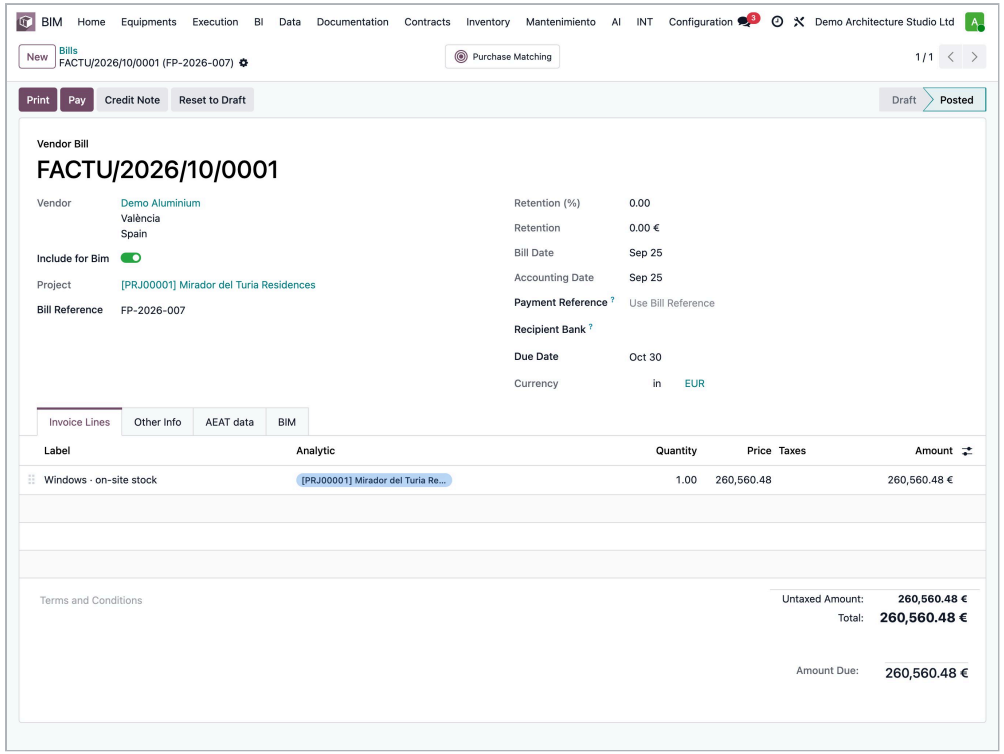
How to fix it

Open the invoice or select it in the list, and run Actualizar Analítico desde Proyecto from the actions menu. It fills the analytic account of all lines from the project.

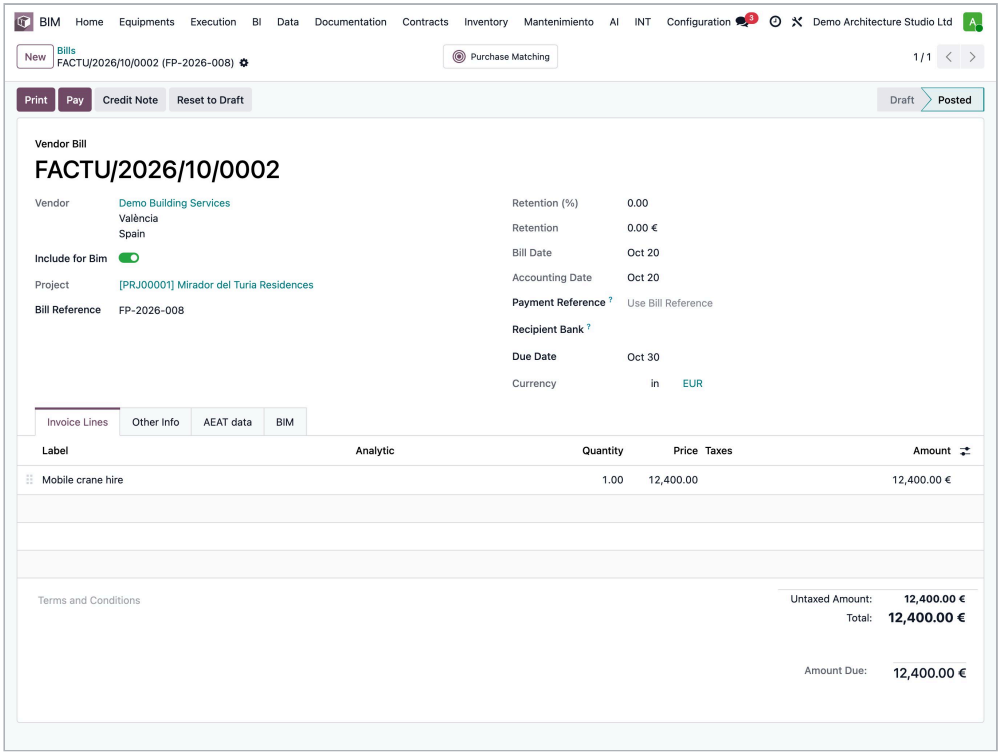
SITE NOTE
Earned value also uses the line's **Budget** field (chapter 10). Fill in both.

09 A correct invoice and one that does not count

Both invoices are posted and have **Include for Bim** and **Project**. Only the line's **Analytic** column differs. If you cannot see it, turn it on with the columns icon at the end of the table header.



FP-2026-007: the Analytic column shows the project. Its €260,560.48 count towards cost.

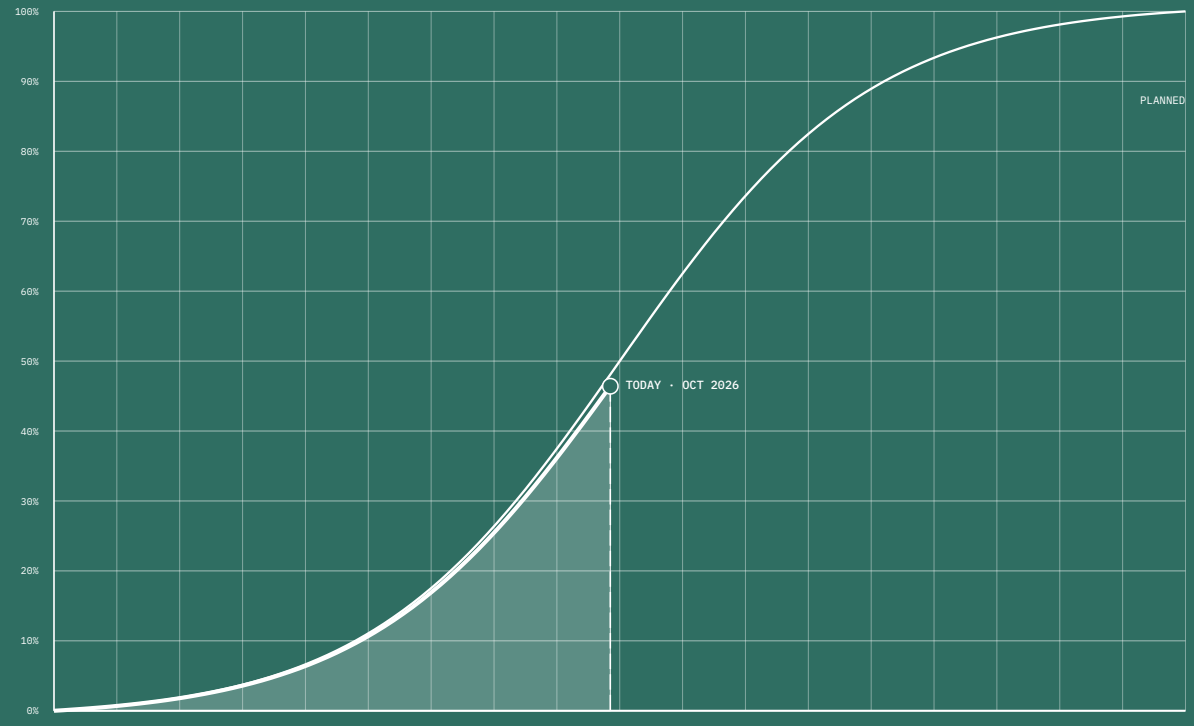


FP-2026-008: Analytic is empty. Its €12,400.00 does not appear in the project.

10

Earned value

With three figures per stage, you know if the project is ahead or behind, and whether it is making or losing money.



The three figures
CPI and SPI
Calculate in the software
Forecast to completion

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	S-curve	NTS	10/16

10 The three figures of the method

Earned value compares, on the same date, what was planned, what was done and what was spent. In BIM 2.0 it is calculated per stage.

ABBR.	NAME	WHERE IT COMES FROM IN BIM 2.0
PV	Planned value	Stage planning, by uniform spread or from the Gantt
EV	Earned value	What was certified in the stage
AC	Actual cost	Supplier invoices, reports, attendance, stock and tools

Two variances

```
CV = EV − AC cost variance
SV = EV − PV schedule variance
```

Positive is good in both cases: you spend less than you produce, or you are ahead of plan.

Two indices

```
CPI = EV / AC cost efficiency
SPI = EV / PV schedule efficiency
```

VALUE	CPI	SPI
Above 1	Under budget	Ahead
Equal to 1	As planned	On time
Below 1	Over budget	Behind

The sample project at stage 7

PV TO DATE	EV TO DATE	AC TO DATE	CPI / SPI
1,127,229	**1,367,755**	**1,296,531**	**1.05 / 1.21**

```
CPI = 1,367,754.52 / 1,296,530.53 = 1.05
SPI = 1,367,754.52 / 1,127,229.17 = 1.21
```

Each euro spent has produced €1.05 of work, and 21% more has been built than was planned by that date.

WARNING
Results are only as good as the data. Actual cost uses invoices with **Budget** on the line and **Include for Bim**. If invoices are missing, the CPI will look falsely high.

HOW TO READ IT
CPI and SPI are cumulative; the CV and SV on screen belong to the stage. That is why CV shows €25,769.72 and not the cumulative €71,223.99.

10 Calculate the indicators

1. Press **UPD** on the budget.
2. Open the **Control** tab.
3. Press **Update Budget**.
4. Check the table of stages.

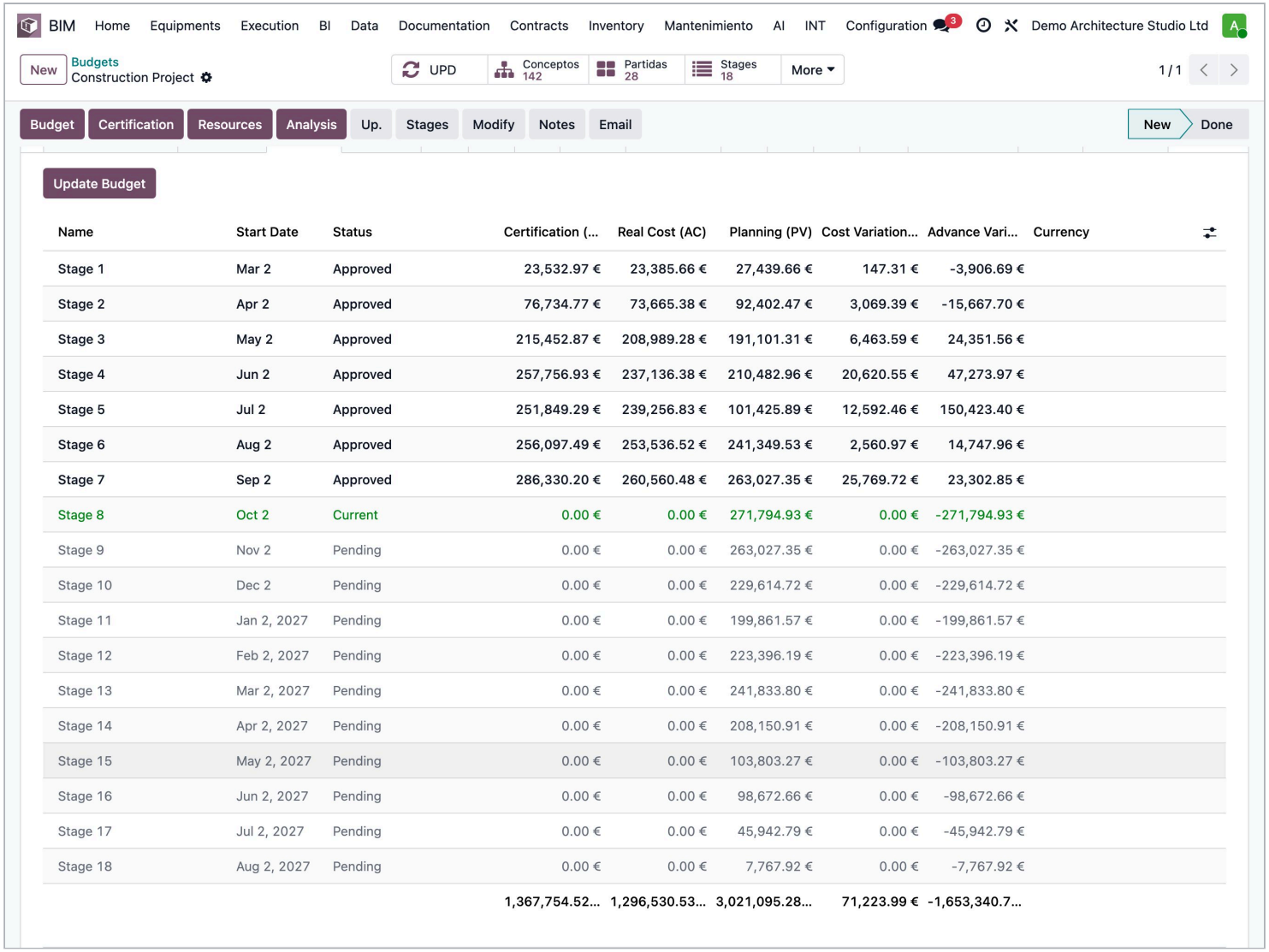
The table shows, per stage, certified, actual cost (AC), planned (PV) and the cost and schedule variances.

How PV is planned

The **Planning** field in the **ST** tab decides it:

MODE	SPREAD
Uniform distribution	Total amount divided by the number of stages
Gantt planning	From the dates of each chapter

> **SITE NOTE**
> Use Gantt planning: uniform spread ignores that projects start slowly and then speed up, and gives an unreliable SPI.



Name	Start Date	Status	Certification (...	Real Cost (AC)	Planning (PV)	Cost Variation...	Advance Vari...	Currency
Stage 1	Mar 2	Approved	23,532.97 €	23,385.66 €	27,439.66 €	147.31 €	-3,906.69 €	
Stage 2	Apr 2	Approved	76,734.77 €	73,665.38 €	92,402.47 €	3,069.39 €	-15,667.70 €	
Stage 3	May 2	Approved	215,452.87 €	208,989.28 €	191,101.31 €	6,463.59 €	24,351.56 €	
Stage 4	Jun 2	Approved	257,756.93 €	237,136.38 €	210,482.96 €	20,620.55 €	47,273.97 €	
Stage 5	Jul 2	Approved	251,849.29 €	239,256.83 €	101,425.89 €	12,592.46 €	150,423.40 €	
Stage 6	Aug 2	Approved	256,097.49 €	253,536.52 €	241,349.53 €	2,560.97 €	14,747.96 €	
Stage 7	Sep 2	Approved	286,330.20 €	260,560.48 €	263,027.35 €	25,769.72 €	23,302.85 €	
Stage 8	Oct 2	Current	0.00 €	0.00 €	271,794.93 €	0.00 €	-271,794.93 €	
Stage 9	Nov 2	Pending	0.00 €	0.00 €	263,027.35 €	0.00 €	-263,027.35 €	
Stage 10	Dec 2	Pending	0.00 €	0.00 €	229,614.72 €	0.00 €	-229,614.72 €	
Stage 11	Jan 2, 2027	Pending	0.00 €	0.00 €	199,861.57 €	0.00 €	-199,861.57 €	
Stage 12	Feb 2, 2027	Pending	0.00 €	0.00 €	223,396.19 €	0.00 €	-223,396.19 €	
Stage 13	Mar 2, 2027	Pending	0.00 €	0.00 €	241,833.80 €	0.00 €	-241,833.80 €	
Stage 14	Apr 2, 2027	Pending	0.00 €	0.00 €	208,150.91 €	0.00 €	-208,150.91 €	
Stage 15	May 2, 2027	Pending	0.00 €	0.00 €	103,803.27 €	0.00 €	-103,803.27 €	
Stage 16	Jun 2, 2027	Pending	0.00 €	0.00 €	98,672.66 €	0.00 €	-98,672.66 €	
Stage 17	Jul 2, 2027	Pending	0.00 €	0.00 €	45,942.79 €	0.00 €	-45,942.79 €	
Stage 18	Aug 2, 2027	Pending	0.00 €	0.00 €	7,767.92 €	0.00 €	-7,767.92 €	
			1,367,754.52...	1,296,530.53...	3,021,095.28...	71,223.99 €	-1,653,340.7...	

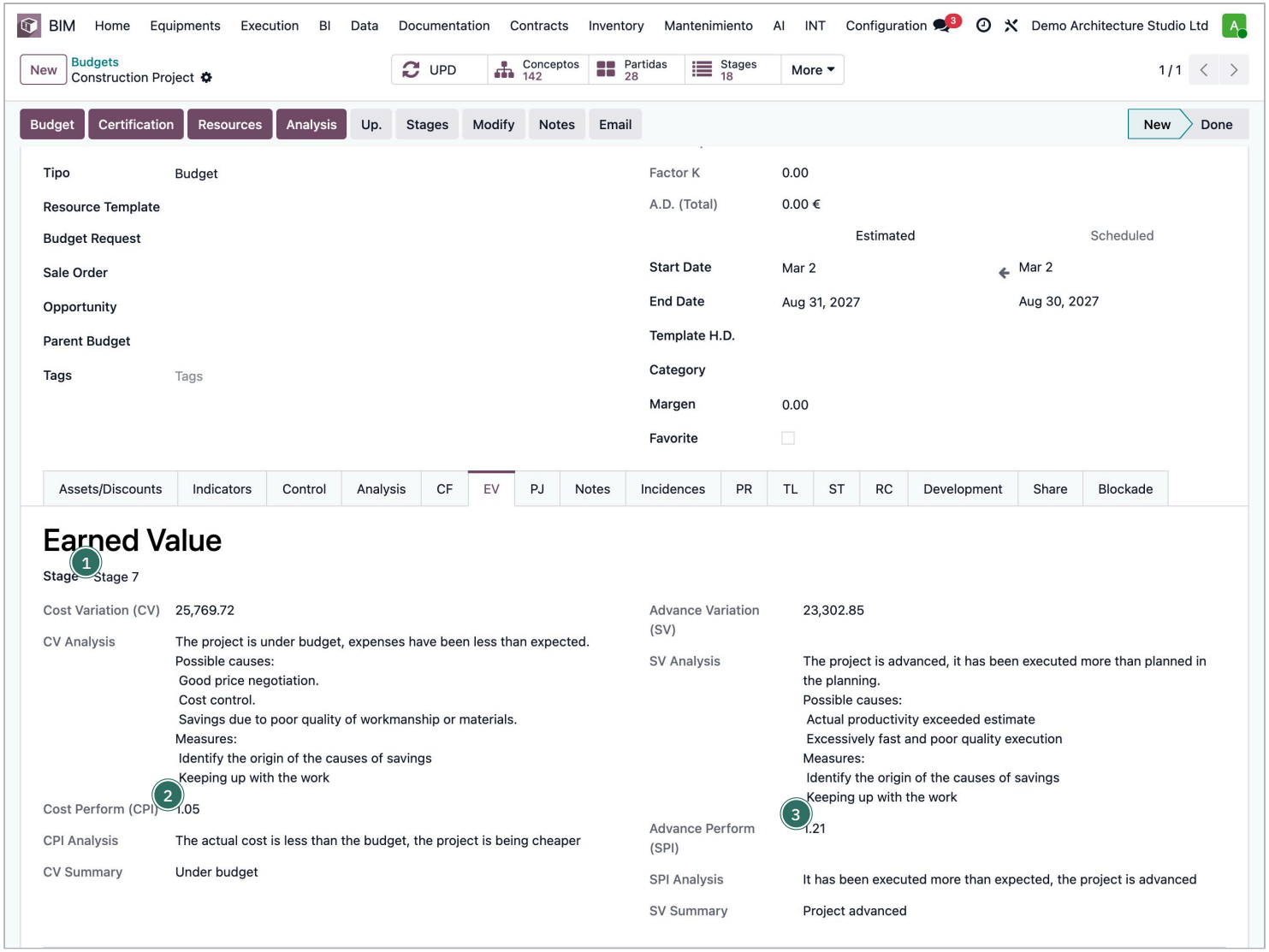
Control tab after updating: certified, actual cost, planned and variances per stage.

10 The EV tab

1. **Stage** to analyse.
2. **CPI**, with its interpretation.
3. **SPI**, with its interpretation.

Choose the stage in the EV tab and the software writes the analysis: whether you are under or over budget, possible causes and measures to take.

> SITE NOTE
> You can pick any approved or current stage to review how the project stood at that point.



Earned value at stage 7: under budget and ahead of schedule.

10 Forecast to completion

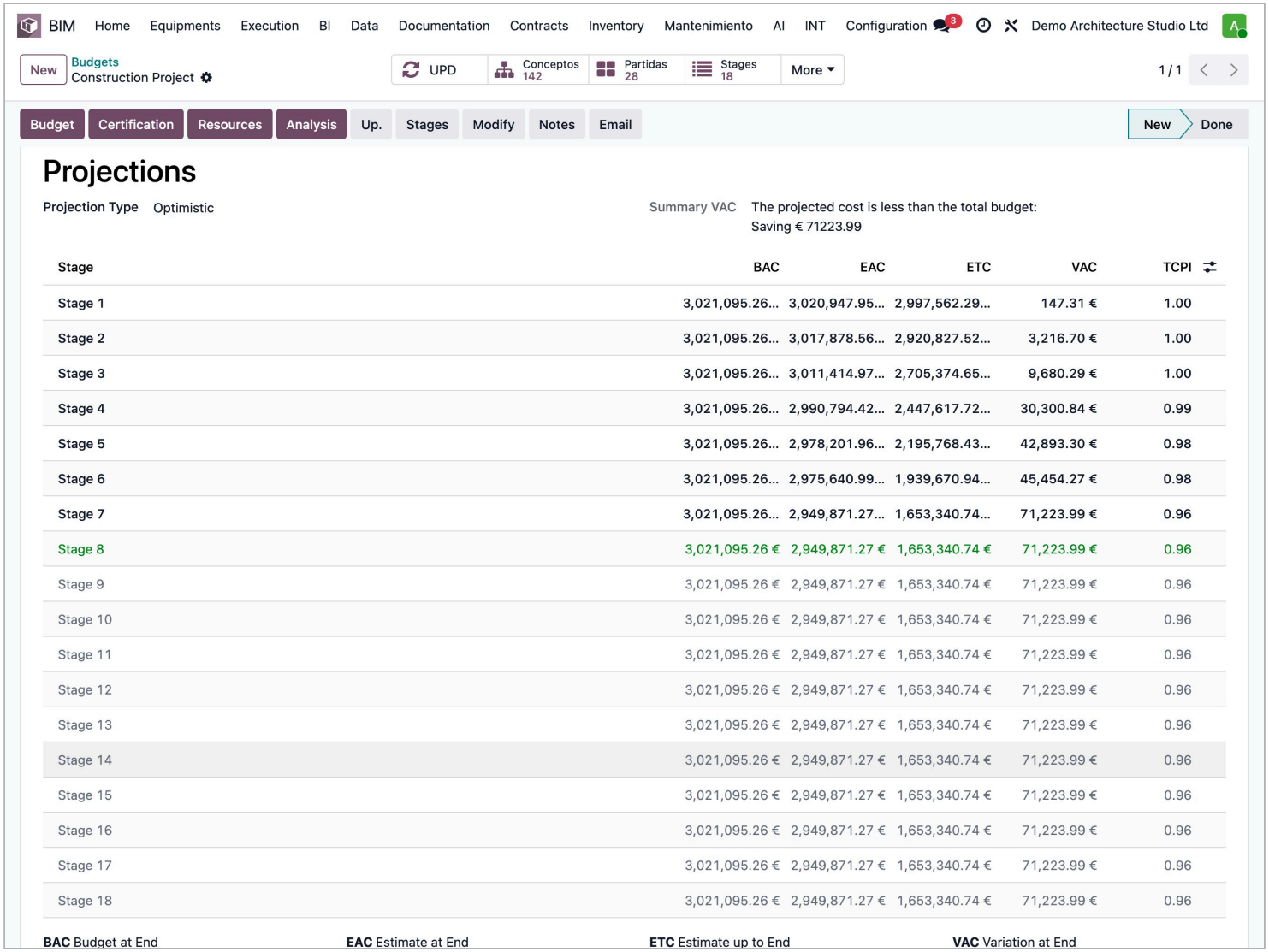
The PJ tab estimates how the project will finish if it carries on like this.

ABBR.	MEANING	SAMPLE
BAC	Total budget	€3,021,095
EAC	Estimated final cost	€2,949,871
ETC	Still to spend	€1,653,341
VAC	Final variance	+€71,224
TCPI	Efficiency needed on the rest	0.96

Three scenarios

TYPE	EAC
Optimistic	AC + (BAC − EV)
Realistic	AC + (BAC − EV) / CPI
Pessimistic	AC + (BAC − EV) / (CPI × SPI)

The sample uses the optimistic one, which assumes the remaining work costs what was budgeted.



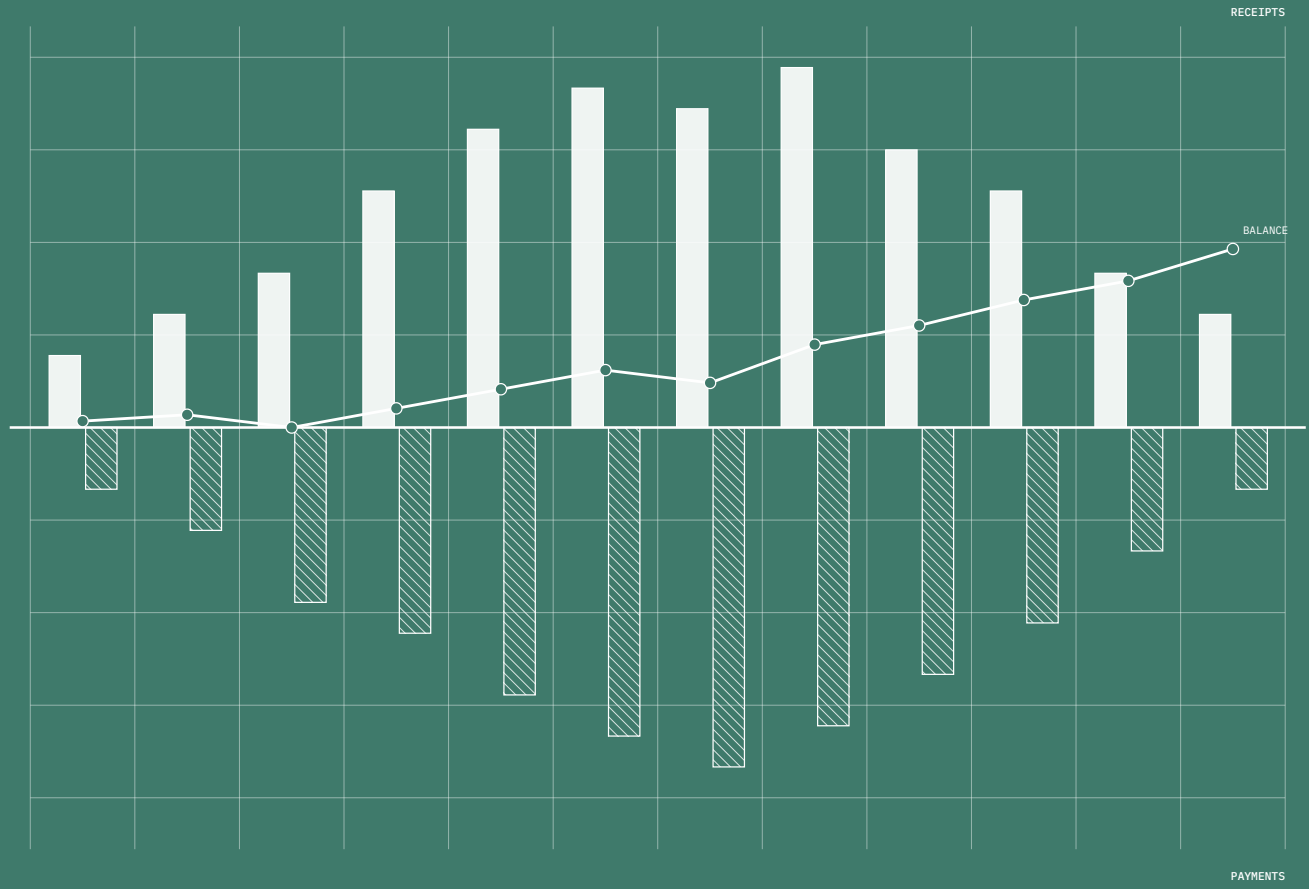
Stage	BAC	EAC	ETC	VAC	TCPI
Stage 1	3,021,095.26...	3,020,947.95...	2,997,562.29...	147.31 €	1.00
Stage 2	3,021,095.26...	3,017,878.56...	2,920,827.52...	3,216.70 €	1.00
Stage 3	3,021,095.26...	3,011,414.97...	2,705,374.65...	9,680.29 €	1.00
Stage 4	3,021,095.26...	2,990,794.42...	2,447,617.72...	30,300.84 €	0.99
Stage 5	3,021,095.26...	2,978,201.96...	2,195,768.43...	42,893.30 €	0.98
Stage 6	3,021,095.26...	2,975,640.99...	1,939,670.94...	45,454.27 €	0.98
Stage 7	3,021,095.26...	2,949,871.27...	1,653,340.74...	71,223.99 €	0.96
Stage 8	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96
Stage 9	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96
Stage 10	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96
Stage 11	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96
Stage 12	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96
Stage 13	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96
Stage 14	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96
Stage 15	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96
Stage 16	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96
Stage 17	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96
Stage 18	3,021,095.26 €	2,949,871.27 €	1,653,340.74 €	71,223.99 €	0.96

Forecast per stage: the project expects a saving of €71,223.99.

11

Cash flow

A profitable project can still run out of money. Here you see when each euro comes in and goes out.



Profit or cash
The generator
Cash flow lines
Recording actuals
Reading the result

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Receipts and payments	NTS	11/16

11 Why you need a cash flow

Budget and earned value answer **how much**. Cash flow answers **when**. They are different questions: a project can make a profit and still have a month with no money to pay.

Where the gap comes from

- The client pays the certification weeks after it is issued.
- A guarantee percentage is held back from each certification.
- Suppliers and wages are paid before you collect.

```
Balance = receipts to date − payments to date
```

KEY IDEA
Profit and cash are not the same. Certifying is not collecting, and a received invoice is not paid until the money leaves the bank.

How BIM 2.0 organises it

It is under Execution › Cash Flow and has two parts:

PART	PURPOSE
Cash Flow Generator	Creates the forecast lines in one go.
Cash Flow	Each line is a planned receipt or payment, with its actual amount.

What each line holds

FIELD	MEANING
Type	Income or Expense
Budgeted	What was forecast
Real	What was collected or paid
Variation	Difference between real and forecast
Date and Stage	When it happens
Payments	Linked payments
Category	Your own classification

SITE NOTE
The budget also has a Cash Flow button that opens just its lines.

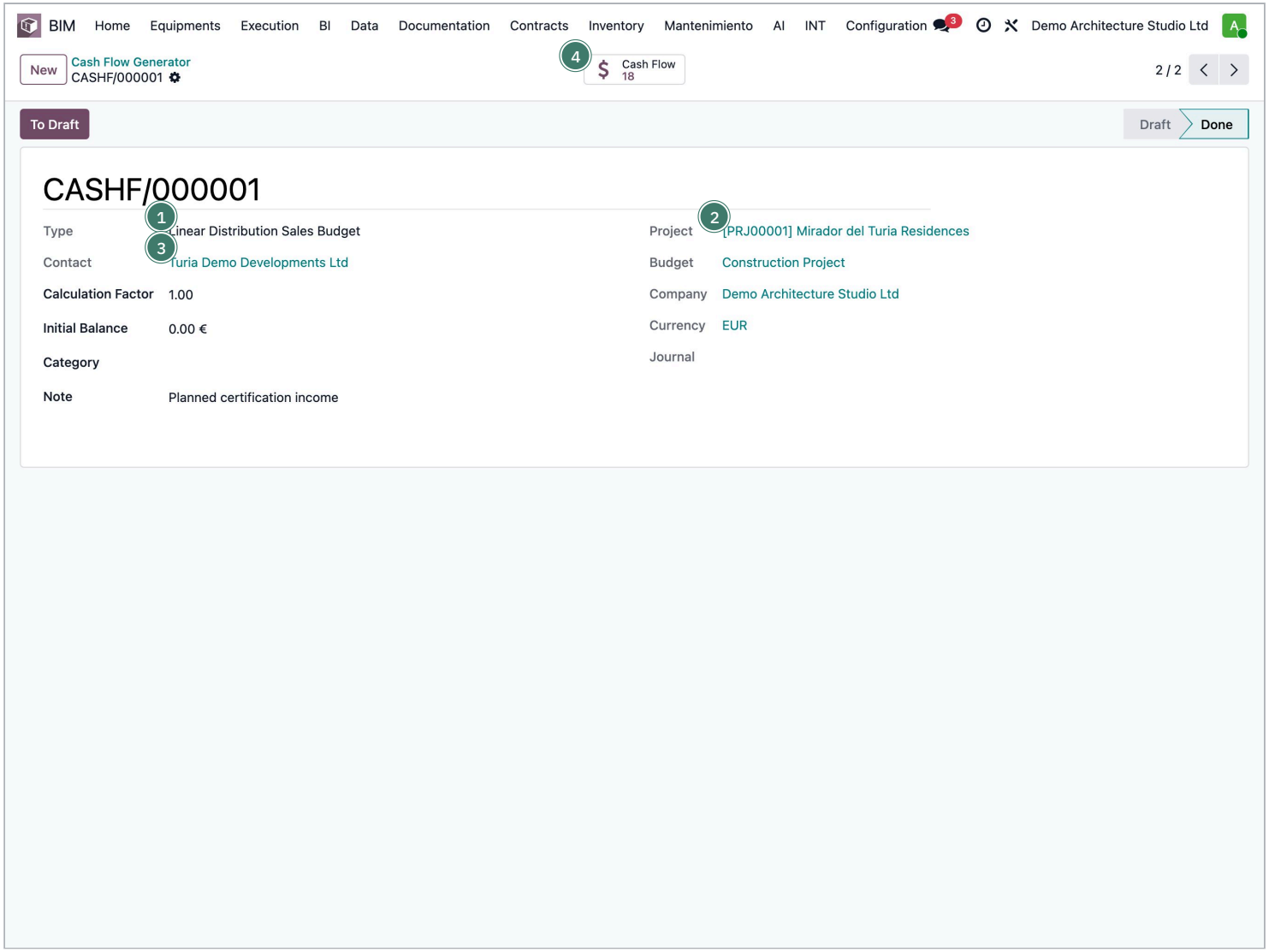
11 Generate the forecast

1. Go to **Execution › Cash Flow › Cash Flow Generator**.
2. Press **New** and choose the type.
3. Enter project, budget and contact.
4. Press **To Done** and check the lines with the **Cash Flow** button.

1. **Type** of distribution.
2. **Project** and budget.
3. **Contact**: required.
4. **Lines** generated.

The usual approach is **two generators**: one for income and one for expenses. The sample creates 18 lines of each, one per stage.

> SITE NOTE
> The **Calculation Factor** multiplies the amounts. Use it to simulate scenarios, such as 1.10 for 10% more.



Income generator of the sample project.

11 The six generator types

TYPE	GENERATES	REQUIRES
Linear Distribution Sales Budget	Income: spreads the amount across stages	Budget with stages
Linear Distribution Costs Budget	Expenses: spreads the cost across stages	Budget with stages
Gantt Distribution Sales Budget	Income from item dates	Items with a stage assigned
By Departure and Stage	Expenses: one line per item, at its end date	Dates on the items
Purchase	Expenses from purchase orders	Confirmed orders
Sale	Income from sales orders	Confirmed orders

WARNING
Linear cost distribution adds labour, equipment and materials, but **not subcontracts**. In the sample it forecasts €2,789,595.18 against a budget of €3,021,095.26: the difference is the €231,500 of subcontracts. Add them with another generator or manual lines.

Which to use

SITUATION	TYPE
Quick forecast at the start	The two linear ones
You want a realistic curve	Gantt, and By Departure and Stage
You already have orders	Purchase and Sale

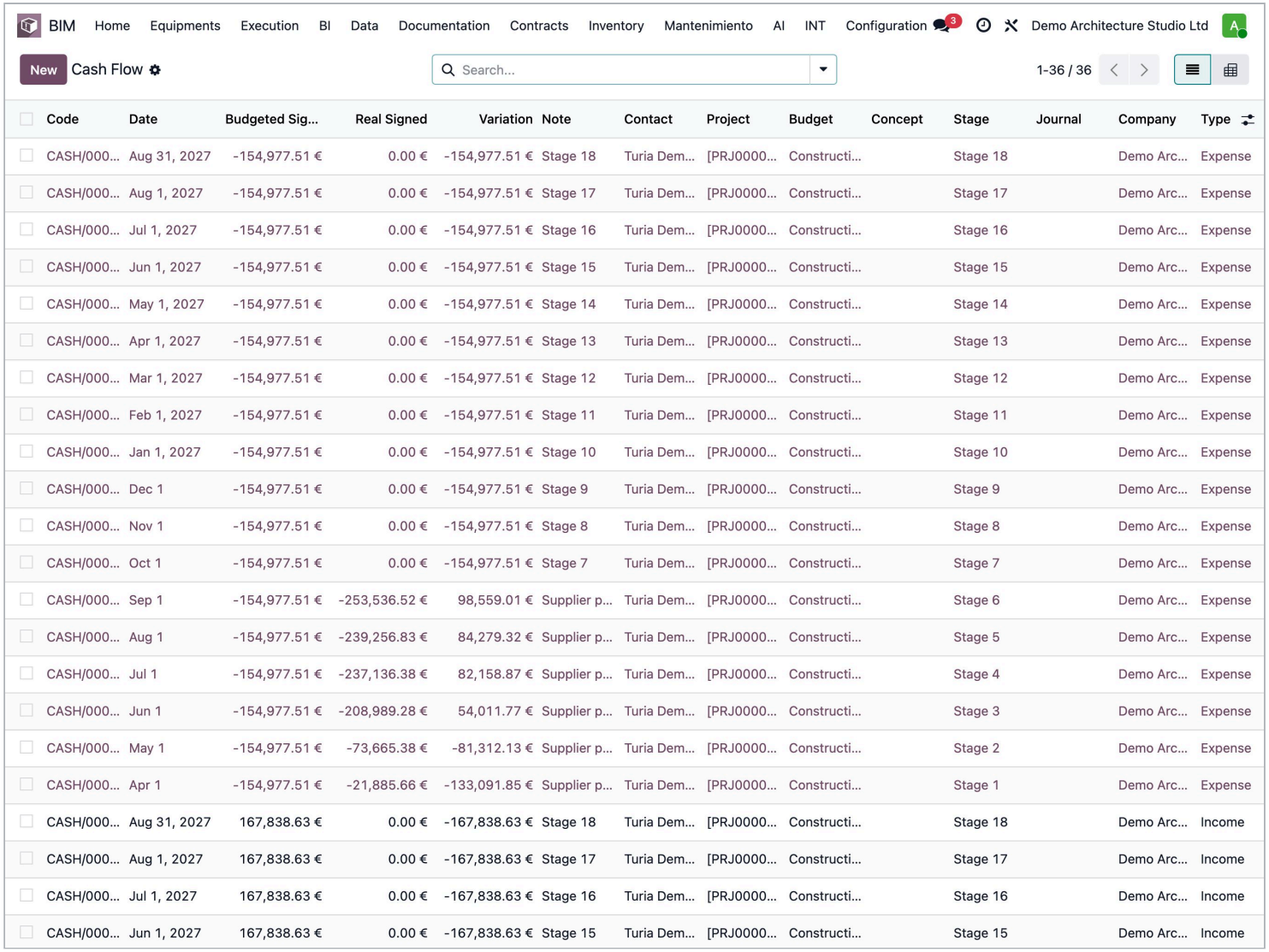
Linear spread is easy, but ignores that projects start slowly. Treat it as a first approximation.

SITE NOTE
Before generating, check the budget is up to date with UPD and that the stages exist. The generator starts from those figures.

WARNING
With the Gantt type, if items have no stage assigned, the generator finishes without creating any lines and gives no warning.

11 Cash flow lines

Each line has date, signed amounts, note, contact, project and stage. Expenses appear as negative. The switcher on the right opens the pivot table.



Code	Date	Budgeted Sig...	Real Signed	Variation	Note	Contact	Project	Budget	Concept	Stage	Journal	Company	Type
CASH/000...	Aug 31, 2027	-154,977.51 €	0.00 €	-154,977.51 €	Stage 18	Turia Dem...	[PRJ0000...	Constructi...		Stage 18		Demo Arc...	Expense
CASH/000...	Aug 1, 2027	-154,977.51 €	0.00 €	-154,977.51 €	Stage 17	Turia Dem...	[PRJ0000...	Constructi...		Stage 17		Demo Arc...	Expense
CASH/000...	Jul 1, 2027	-154,977.51 €	0.00 €	-154,977.51 €	Stage 16	Turia Dem...	[PRJ0000...	Constructi...		Stage 16		Demo Arc...	Expense
CASH/000...	Jun 1, 2027	-154,977.51 €	0.00 €	-154,977.51 €	Stage 15	Turia Dem...	[PRJ0000...	Constructi...		Stage 15		Demo Arc...	Expense
CASH/000...	May 1, 2027	-154,977.51 €	0.00 €	-154,977.51 €	Stage 14	Turia Dem...	[PRJ0000...	Constructi...		Stage 14		Demo Arc...	Expense
CASH/000...	Apr 1, 2027	-154,977.51 €	0.00 €	-154,977.51 €	Stage 13	Turia Dem...	[PRJ0000...	Constructi...		Stage 13		Demo Arc...	Expense
CASH/000...	Mar 1, 2027	-154,977.51 €	0.00 €	-154,977.51 €	Stage 12	Turia Dem...	[PRJ0000...	Constructi...		Stage 12		Demo Arc...	Expense
CASH/000...	Feb 1, 2027	-154,977.51 €	0.00 €	-154,977.51 €	Stage 11	Turia Dem...	[PRJ0000...	Constructi...		Stage 11		Demo Arc...	Expense
CASH/000...	Jan 1, 2027	-154,977.51 €	0.00 €	-154,977.51 €	Stage 10	Turia Dem...	[PRJ0000...	Constructi...		Stage 10		Demo Arc...	Expense
CASH/000...	Dec 1	-154,977.51 €	0.00 €	-154,977.51 €	Stage 9	Turia Dem...	[PRJ0000...	Constructi...		Stage 9		Demo Arc...	Expense
CASH/000...	Nov 1	-154,977.51 €	0.00 €	-154,977.51 €	Stage 8	Turia Dem...	[PRJ0000...	Constructi...		Stage 8		Demo Arc...	Expense
CASH/000...	Oct 1	-154,977.51 €	0.00 €	-154,977.51 €	Stage 7	Turia Dem...	[PRJ0000...	Constructi...		Stage 7		Demo Arc...	Expense
CASH/000...	Sep 1	-154,977.51 €	-253,536.52 €	98,559.01 €	Supplier p...	Turia Dem...	[PRJ0000...	Constructi...		Stage 6		Demo Arc...	Expense
CASH/000...	Aug 1	-154,977.51 €	-239,256.83 €	84,279.32 €	Supplier p...	Turia Dem...	[PRJ0000...	Constructi...		Stage 5		Demo Arc...	Expense
CASH/000...	Jul 1	-154,977.51 €	-237,136.38 €	82,158.87 €	Supplier p...	Turia Dem...	[PRJ0000...	Constructi...		Stage 4		Demo Arc...	Expense
CASH/000...	Jun 1	-154,977.51 €	-208,989.28 €	54,011.77 €	Supplier p...	Turia Dem...	[PRJ0000...	Constructi...		Stage 3		Demo Arc...	Expense
CASH/000...	May 1	-154,977.51 €	-73,665.38 €	-81,312.13 €	Supplier p...	Turia Dem...	[PRJ0000...	Constructi...		Stage 2		Demo Arc...	Expense
CASH/000...	Apr 1	-154,977.51 €	-21,885.66 €	-133,091.85 €	Supplier p...	Turia Dem...	[PRJ0000...	Constructi...		Stage 1		Demo Arc...	Expense
CASH/000...	Aug 31, 2027	167,838.63 €	0.00 €	-167,838.63 €	Stage 18	Turia Dem...	[PRJ0000...	Constructi...		Stage 18		Demo Arc...	Income
CASH/000...	Aug 1, 2027	167,838.63 €	0.00 €	-167,838.63 €	Stage 17	Turia Dem...	[PRJ0000...	Constructi...		Stage 17		Demo Arc...	Income
CASH/000...	Jul 1, 2027	167,838.63 €	0.00 €	-167,838.63 €	Stage 16	Turia Dem...	[PRJ0000...	Constructi...		Stage 16		Demo Arc...	Income
CASH/000...	Jun 1, 2027	167,838.63 €	0.00 €	-167,838.63 €	Stage 15	Turia Dem...	[PRJ0000...	Constructi...		Stage 15		Demo Arc...	Income

Project cash flow: lines with Real filled in already have linked payments.

11 Recording actuals

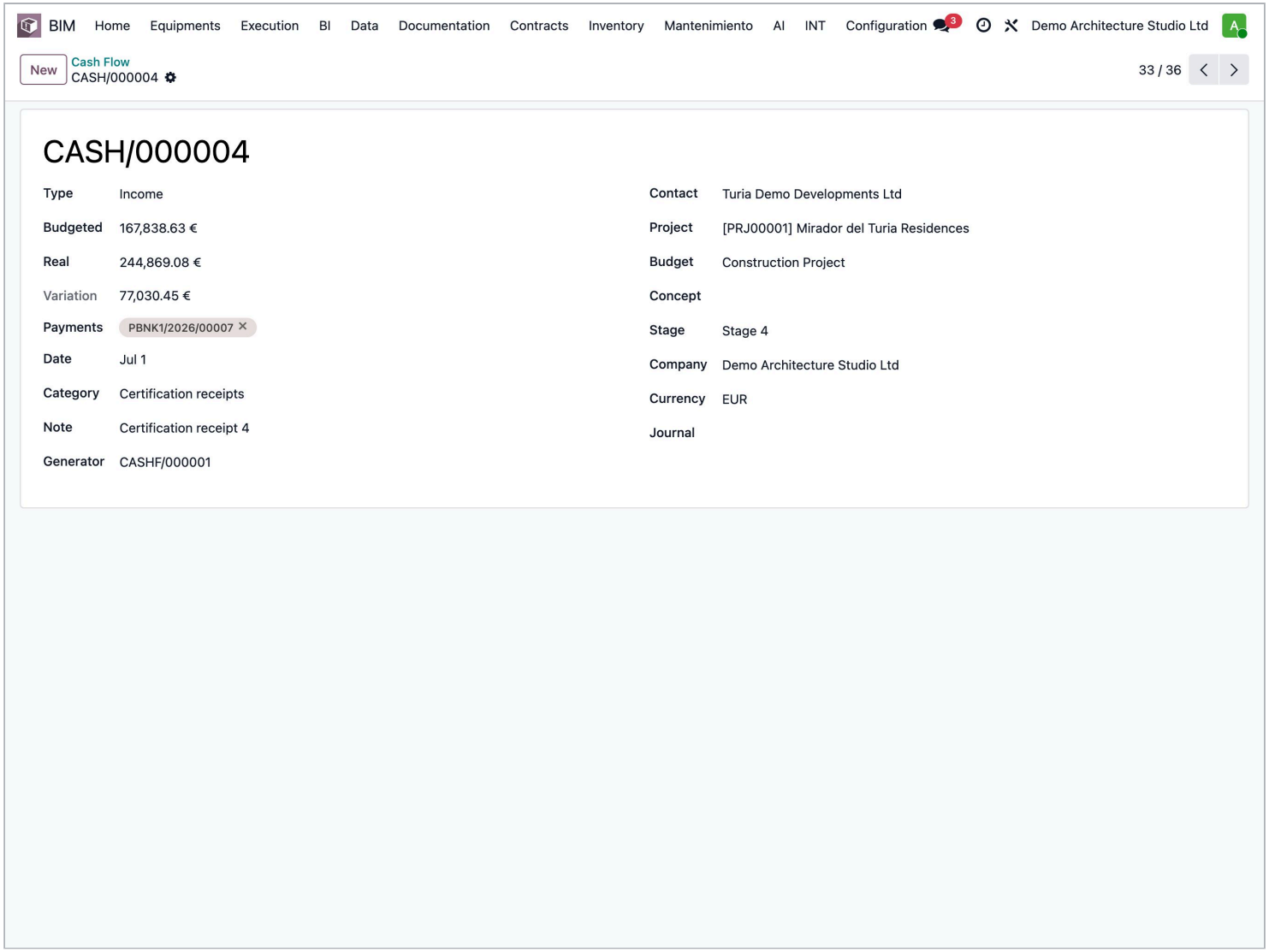
A line's **Real** does not fill in by itself: it comes from the **payments** you link to it.

1. Record the receipt or payment in Accounting.
2. Open the cash flow line.
3. Add it in the **Payments** field.
4. Real updates with the sum of the payments.

```
Budgeted €167,838.63
Real €244,869.08
Variation €77,030.45
```

This sample line is stage 4. The real receipt beats the linear forecast because work concentrates in those months.

> **WARNING**
> If you do not link payments, the cash flow keeps showing Real at zero even though the money has moved.



Receipt line for stage 4, with its linked payment.

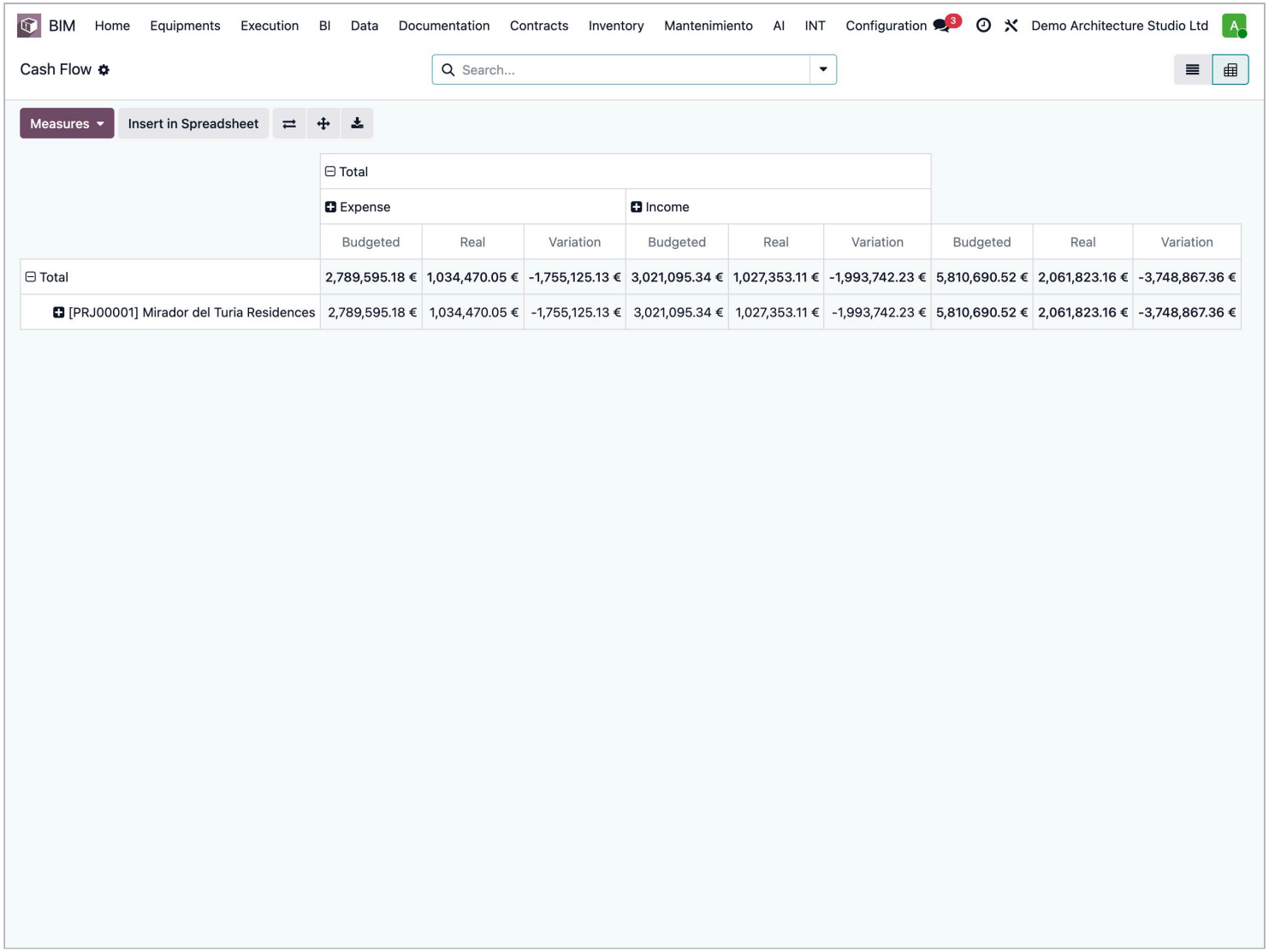
11 Reading the result

The pivot table summarises by project and type.

	FORECAST	REAL
Income	3,021,095.34	1,027,353.11
Expenses	2,789,595.18	1,034,470.05
Balance	**231,500.16**	**−7,116.94**

The project has collected €1,027,353 and paid €1,034,470: the company is **financing the project with €7,116.94**, even though earned value says cost is going well. The two readings are compatible.

> SITE NOTE
> Group by month or category from the table headers. It is the fastest way to find the month with the lowest balance.

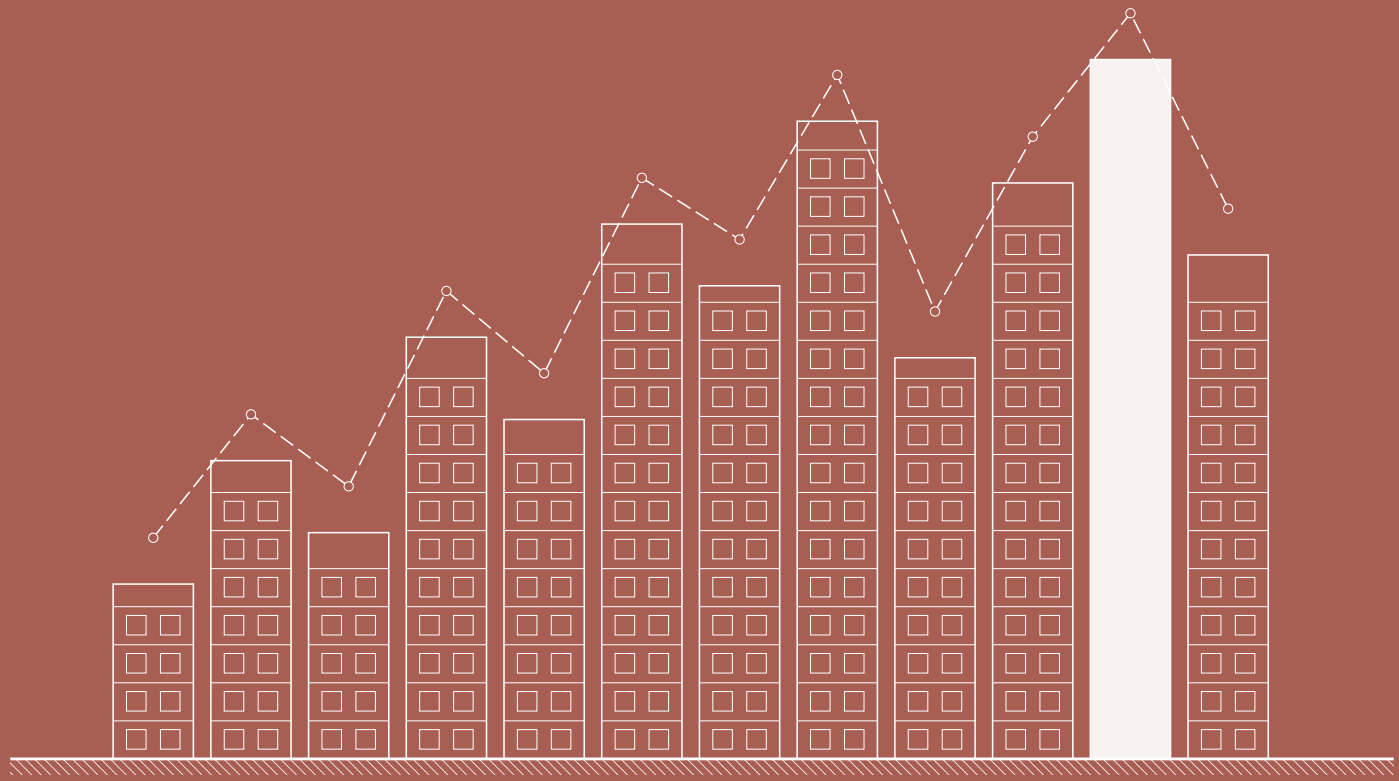


Pivot table of the sample project's cash flow.

12

Dashboards

Control dashboards for management and production: the whole project portfolio on one screen.

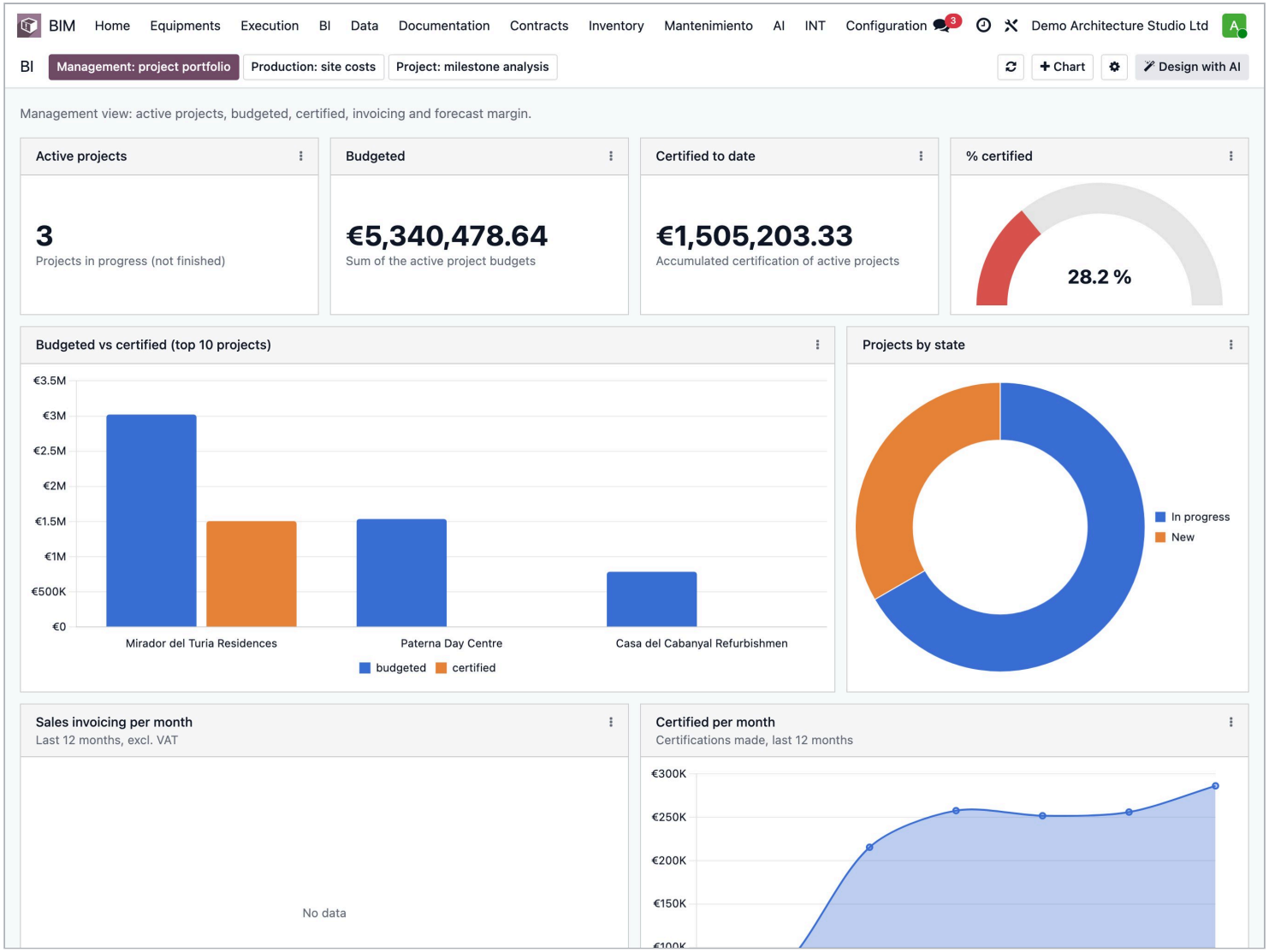


Management dashboard
Production dashboard
Milestone analysis
Create charts

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Indicator profile	NTS	12/16

12 Management: project portfolio

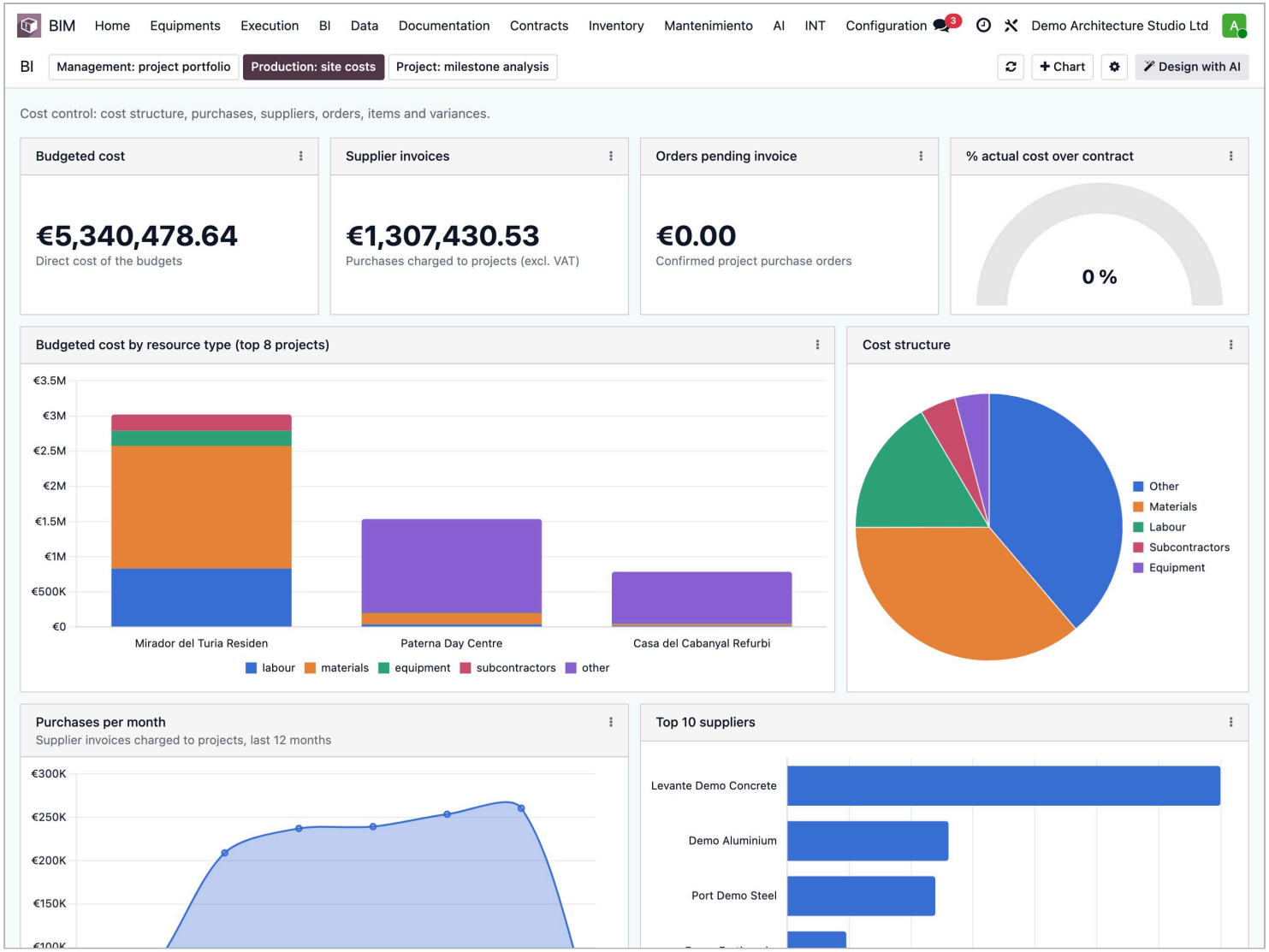
Under **BI › Dashboards**. It sums up active projects, budgeted, certified to date and % certified. Further down: invoicing and certified per month.



Management dashboard. Certified to date includes certification 8, still in progress.

12 Production: site costs

It analyses the cost structure: labour, materials, equipment and subcontracts, plus supplier invoices, pending orders and main suppliers.



Production dashboard: cost by resource type and cost structure.

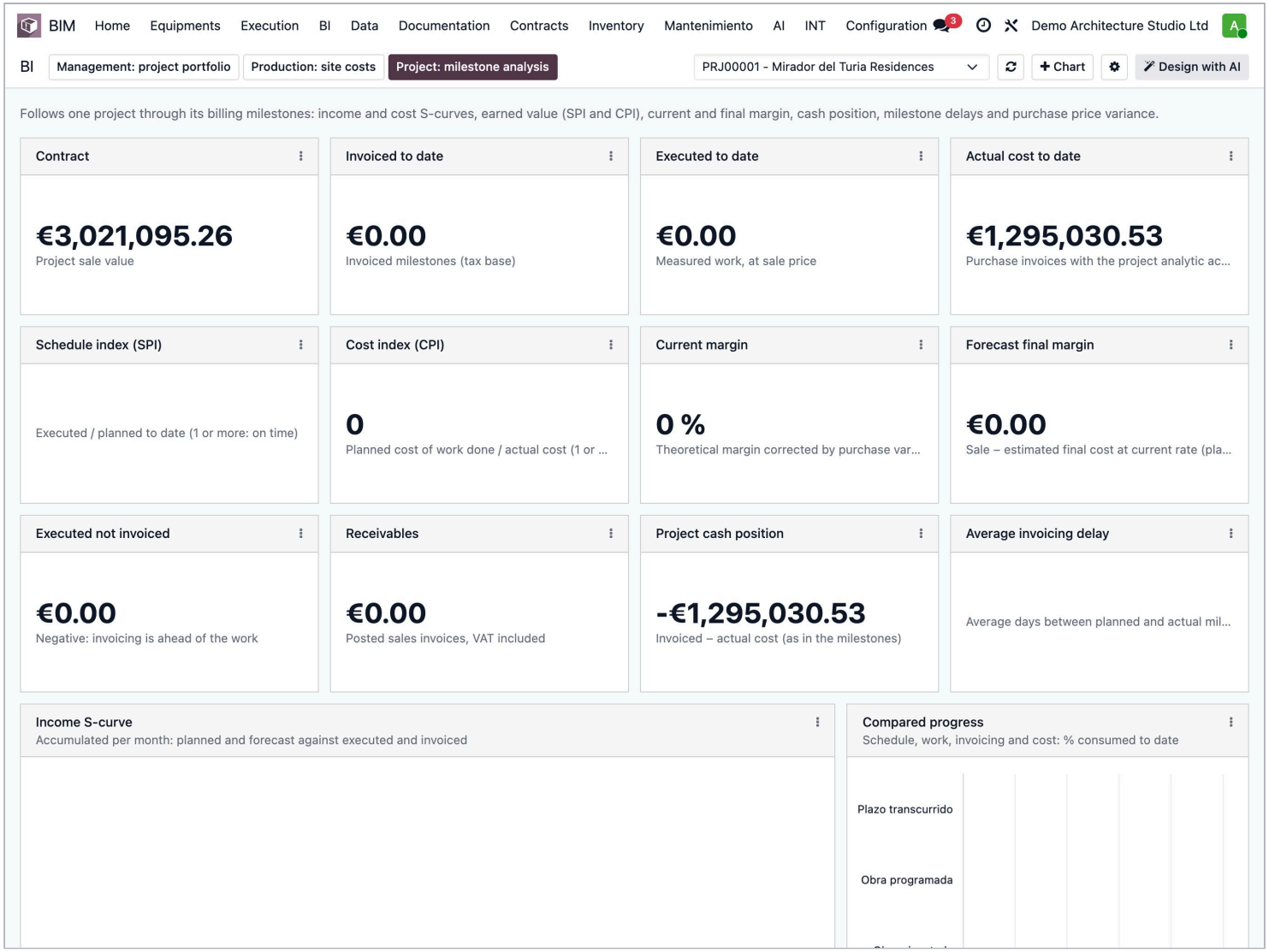
12 Project: milestone analysis

This dashboard focuses on **a single project**, chosen in the top selector. It shows contract, invoiced and executed to date, schedule and cost indices, margin, cash and delays.

REQUIREMENT

It runs on the project's **billing milestones**. If you have not created them, most indicators show zero, as here.

Milestones are set under Home › Certifications › Hitos de Facturación.



Project dashboard. The sample has no billing milestones, so many indicators are empty or zero.

12 Create and customise dashboards

Dashboard controls

BUTTON	FUNCTION
Top tabs	Switch dashboard
Refresh	Reloads the data
+ Chart	Adds a new element
Gear	Configures the dashboard
Design with AI	Describe what you want and the AI proposes the chart
⋮ on each chart	Options for that element

Element types

Number indicator, gauge, columns, horizontal bars, lines, areas, pie, donut, scatter, waterfall and table.

Who can do what

PROFILE	CAN
BI User	View dashboards
BI Admin	Also design and configure them

Where the data comes from

Each chart is a **read-only** query on the database, so a dashboard never changes anything.

> **WARNING**
> Dashboards read stored data. If a total does not add up, press **UPD** on the budget or project and reload the dashboard.

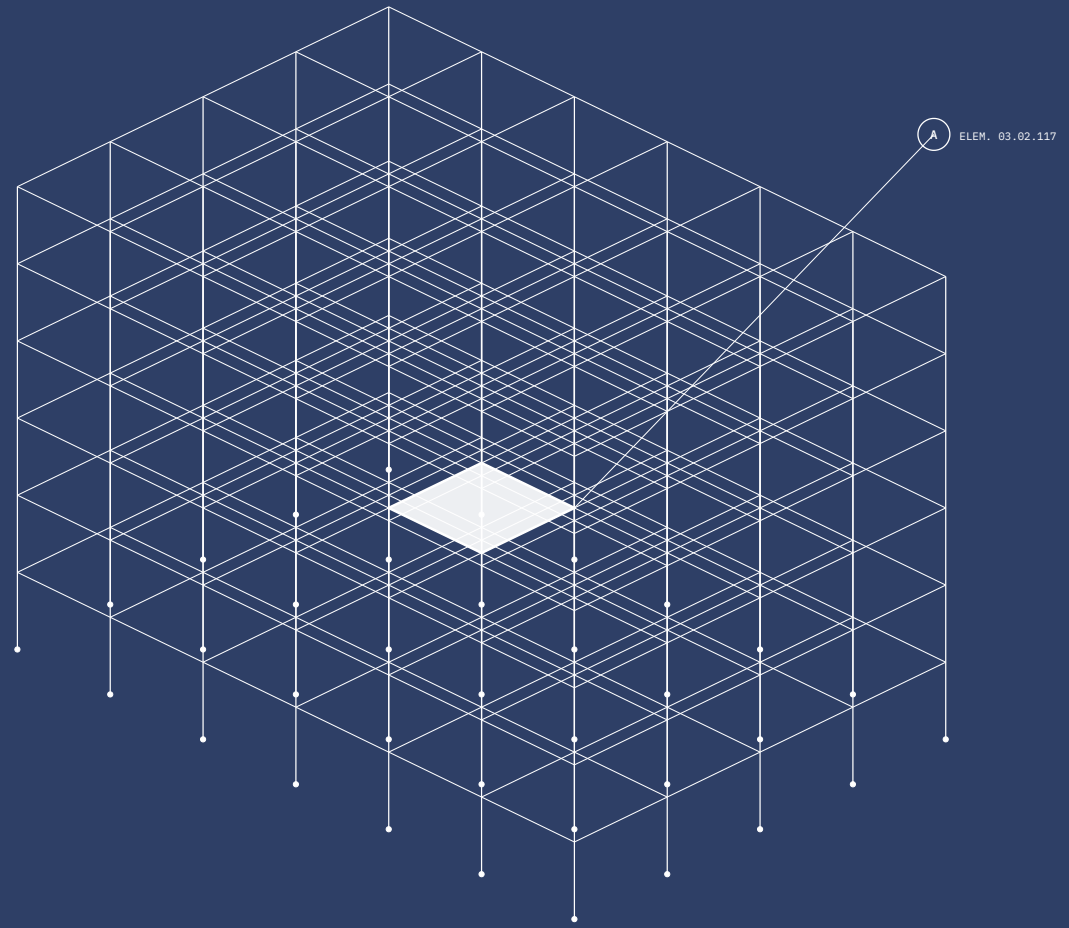
Other financial views

MENU	PURPOSE
Result Table	Result per project, with date, state and site manager filters
Income Statement Summary	Income statement of a budget
BI RO	Budget, provision and expense by phase

13

BIM integration

From the Revit model to the budget:
quantities you no longer measure by hand.



Import from Revit
CSV format
Models in Autodesk

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Structural model	NTS	13/16

13 Import quantities from Revit

In **INT › Revit Budget Import** you turn a Revit schedule into items.

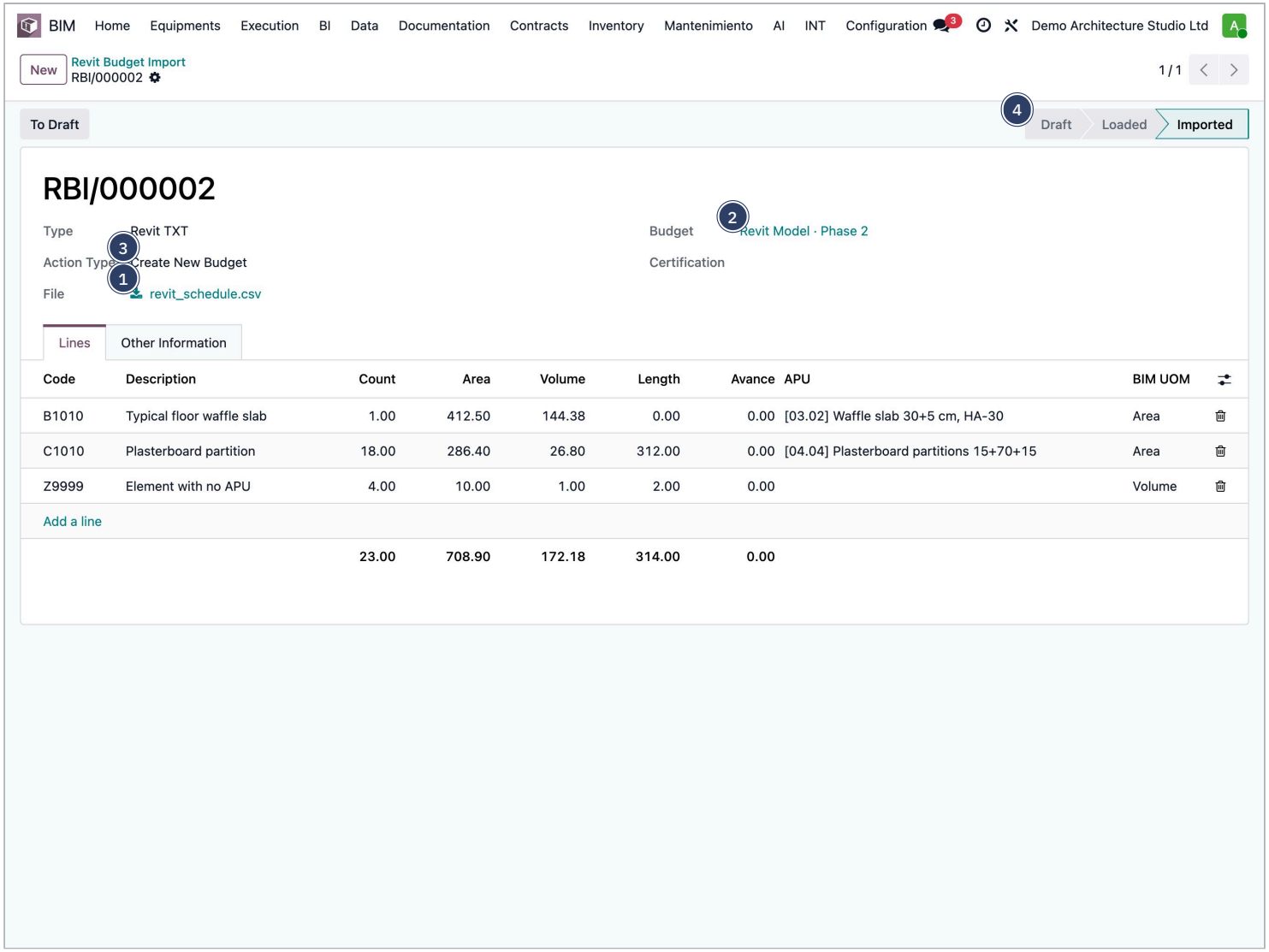
1. **File**: the schedule as CSV.
2. **Budget** to load into.
3. **Action**: create items or load progress into a certification.
4. **State** of the import.

CSV format

Comma separated, with a header and these seven columns in order:

```
Description, Assembly Code, Count,
Area, Volume, Length, Advance
```

> **WARNING**
> The **Assembly Code** must match the **BIM ID** of a unit price, which must also have a **Group**. Rows with no match are skipped with no warning.

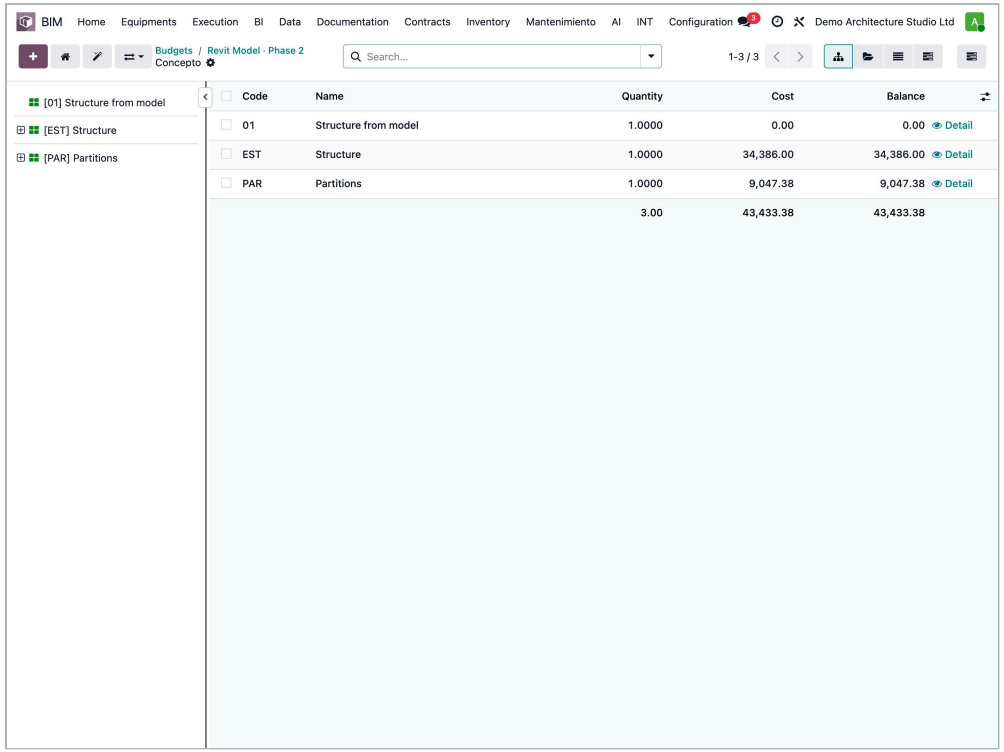


Import with two linked rows and one with no price (Z9999), which creates no item.

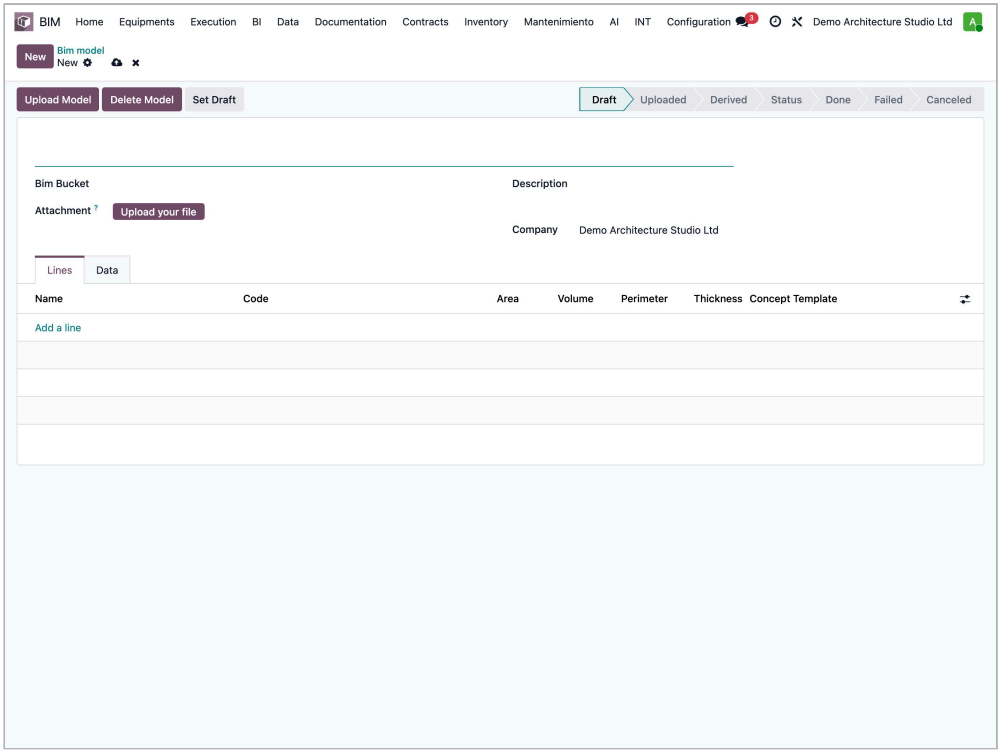
13 How it looks in the budget

Each line creates an item with the unit price breakdown and, as quantity, the area, volume, length or count, according to the price's **BIM UOM**.

To view models, BIM 2.0 connects to **Autodesk Platform Services**. It needs an Autodesk account and is set up under **INT** with Server, Bucket and Model.



Each unit price group becomes a chapter.

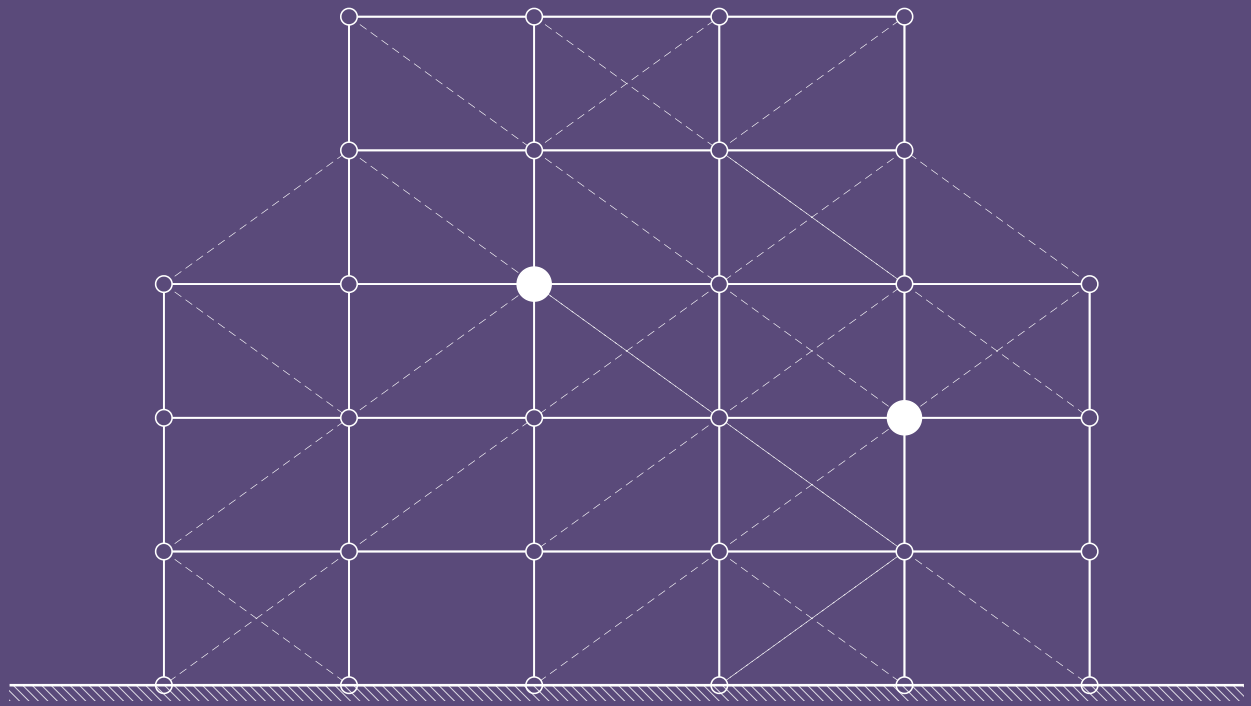


BIM model: uploaded to Autodesk to view it and extract data.

14

Artificial intelligence

How AI is integrated in BIM 2.0: where it appears, how it connects and what data it uses.



How the integration works
Set up the model
Budget assistant
AI in each document
Design dashboards
ChatBim

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Connection network	NTS	14/16

14 How AI is integrated

BIM 2.0 has no AI of its own. It **connects to an external provider** of language models using your access key, and gives it the context of your project so it answers with your data.

The path of a request

1. You type or dictate what you need.
2. BIM 2.0 adds the context: the budget or the open document.
3. The AI provider generates the answer.
4. BIM 2.0 shows it or applies the changes.
5. If you do not like it, press **Undo**.

Supported providers

PROVIDER	MODELS
OpenAI	gpt-4o, gpt-4o-mini, gpt-4.1, gpt-4.1-mini, gpt-5, gpt-5-mini
DeepSeek	deepseek-chat
Others	Any service compatible with the OpenAI API, by entering its URL

Where it appears

PLACE	WHAT IT DOES
Budget assistant	Reads and changes the budget
AI button in documents	Answers about the open document
Design with AI	Creates dashboard charts
ChatBim	Long conversations with saved instructions

PRIVACY
What you ask the AI **leaves your server for the provider**: budget description, document data and attached files. Check that this fits the confidentiality of your project and contracts.

COST
AI usage is billed by the provider by consumption, separately from BIM 2.0.

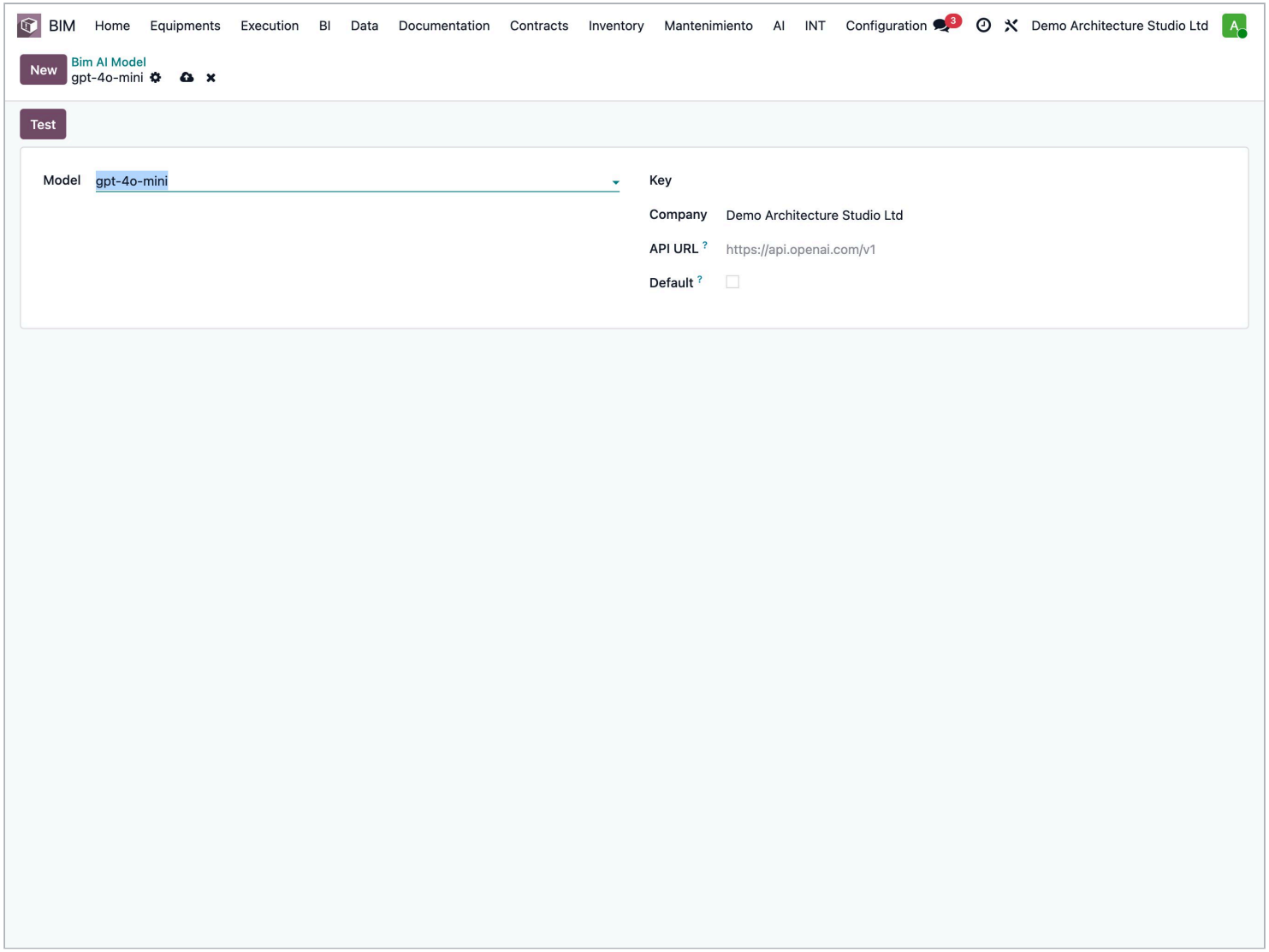
RESPONSIBILITY
AI can be wrong. Always review its results: technical and financial responsibility remains yours.

14 Set up the model

1. Give the user the **IA** profile.
2. Go to **AI › Models** and press **New**.
3. Choose the model.
4. Paste your provider account **key**.
5. Tick **Default**.
6. Press **Test**.

FIELD	PURPOSE
Model	The one you will use
Key	The provider's API key
API URL	Empty for OpenAI or DeepSeek; fill it in for another service
Default	Used by the assistant and dashboards

WARNING
Treat the key like a password: whoever has it can spend at your expense.



AI model record.

14 Budget assistant

Open the panel with the wand icon in the tree. It reads the budget and can change it:

- **Create** chapters, items and resources.
- **Change** prices, quantities and names.
- **Measure**: add take-off lines.
- **Schedule** dates, on working days.
- **Query**: "what are the 5 most expensive items?".

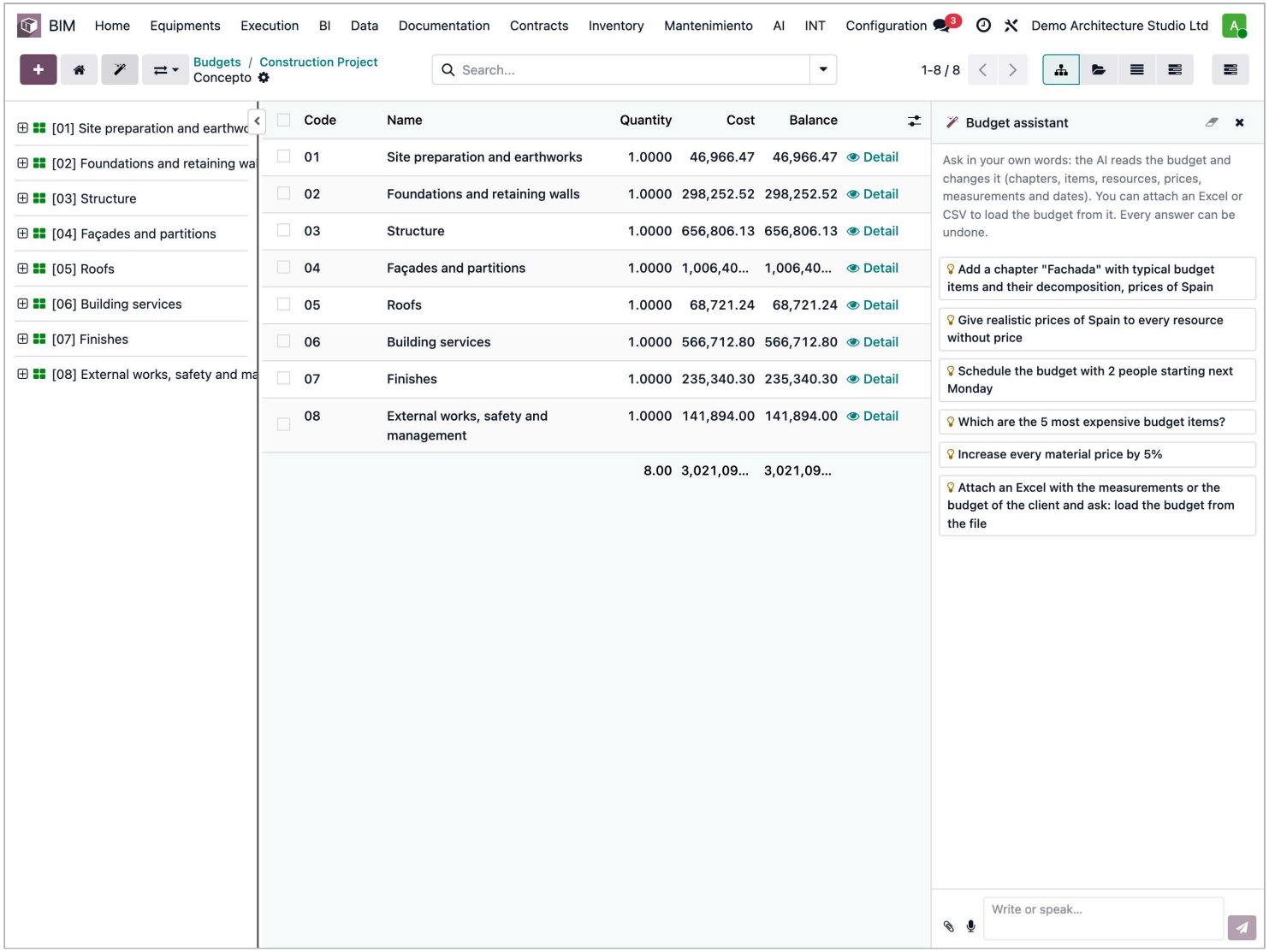
Files and voice

It accepts **.xlsx, .xlsm, .xls and .csv**. You can attach the client's take-off and ask it to load the budget. Dictation is also supported.

Undo

Each reply that changes data can be reverted with Undo. The conversation stays saved on the budget.

> WARNING
> After using the assistant, press UPD before producing reports.



Assistant panel next to the tree, with sample requests.

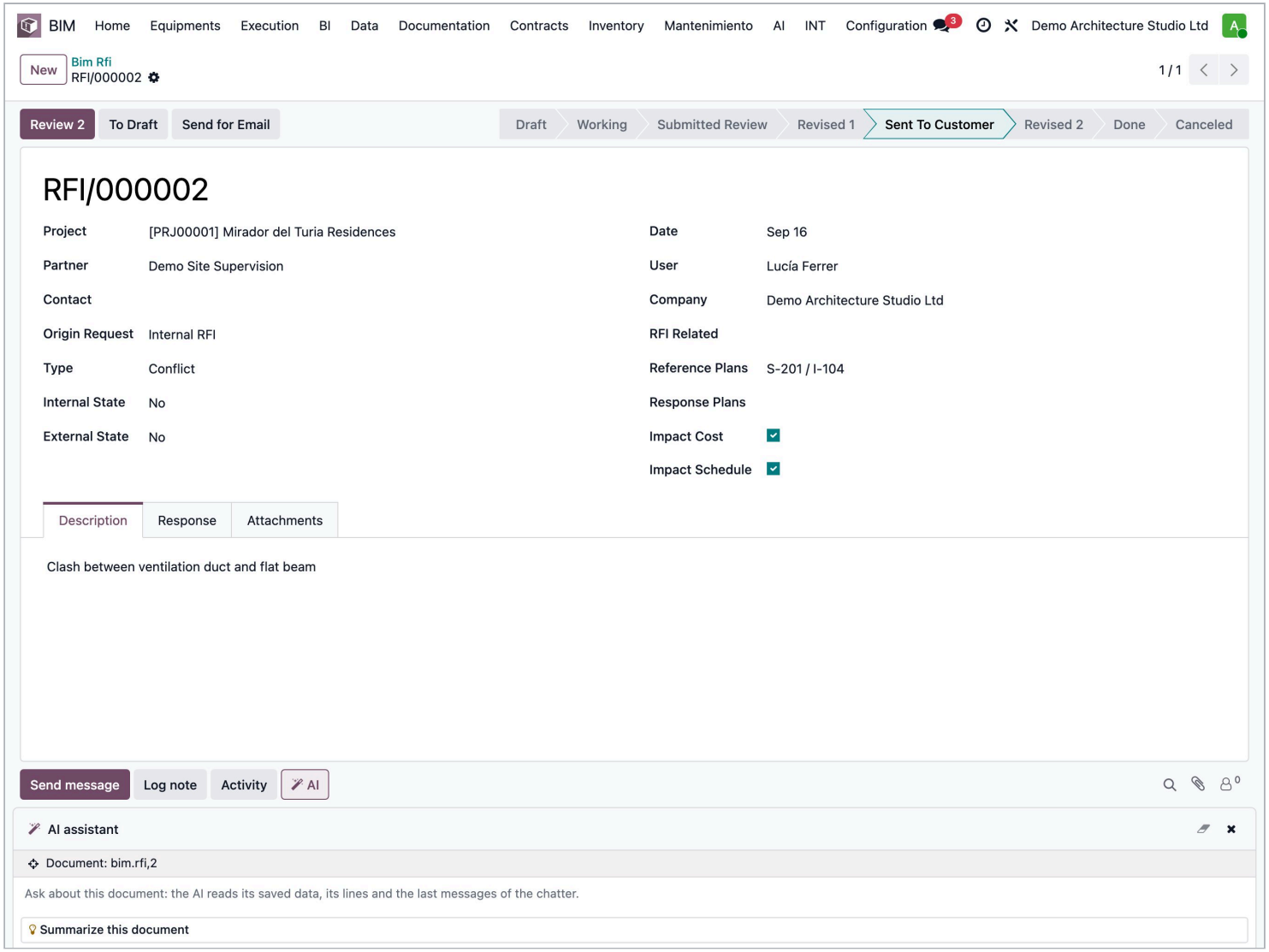
14 AI in each document

The chatter of documents includes an **AI** button that opens a chat about that record.

The AI receives the document fields, its lines and the latest chatter messages. Use it to:

- Summarise a long RFI.
- Ask what is missing from a document.
- Explain a payment status.

> SITE NOTE
> Here the AI **only answers** from the record's data. If something is not there, it says so. It does not change the document.



AI button in an RFI's chatter.

14 Design dashboards with AI

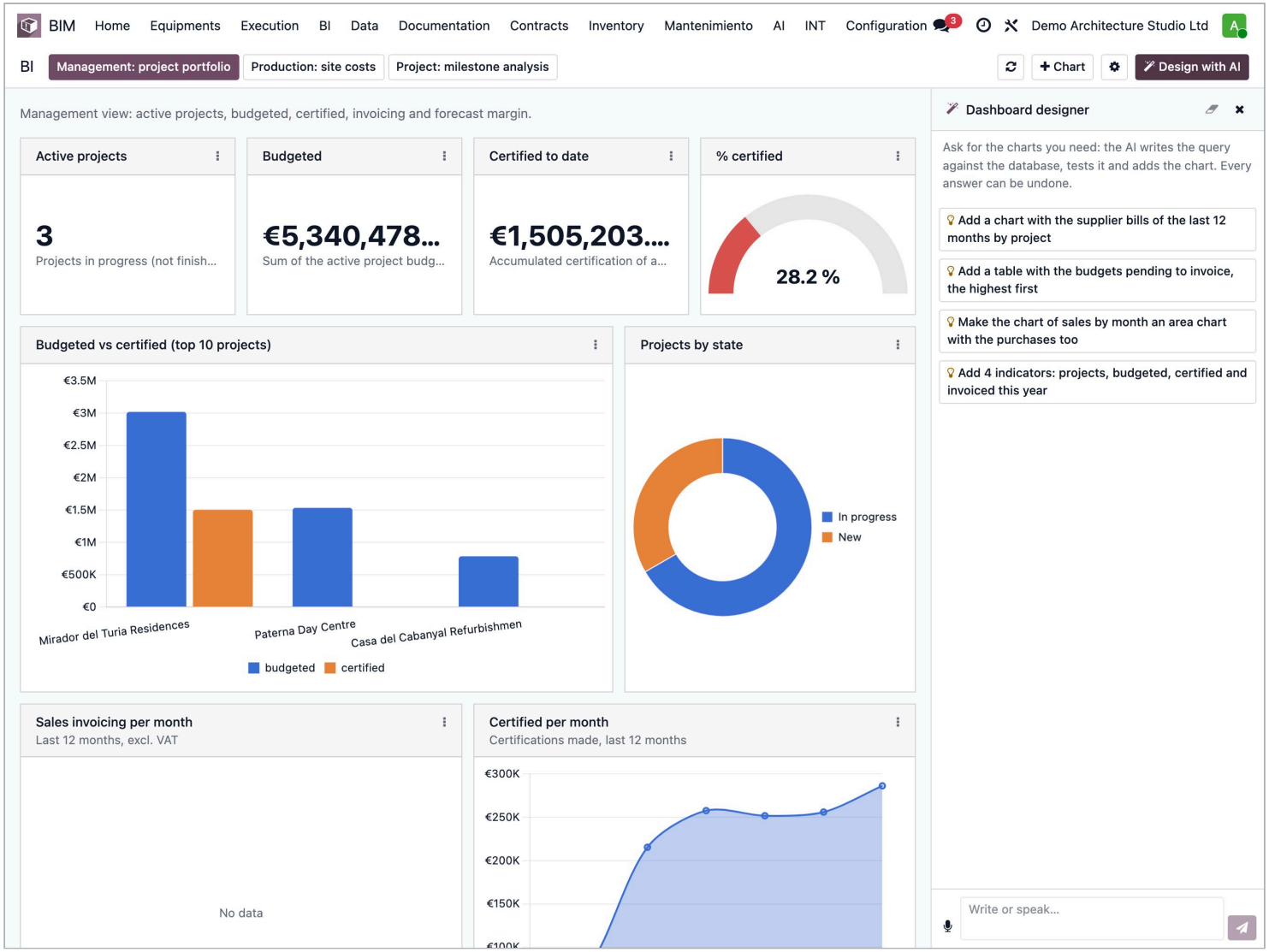
In dashboards, **Design with AI** opens the dashboard designer. Describe what you want and the AI writes the query, tests it and adds the chart.

Examples

- Add a chart with supplier invoices for the last 12 months by project.
- Turn the invoicing per month chart into areas.
- Add 4 indicators: projects, budgeted, certified and invoiced this year.

Queries are **read-only**, so they cannot change data. Each reply can be undone.

> SITE NOTE
> Only available to the BI Admin profile.



Designer panel next to the Management dashboard.

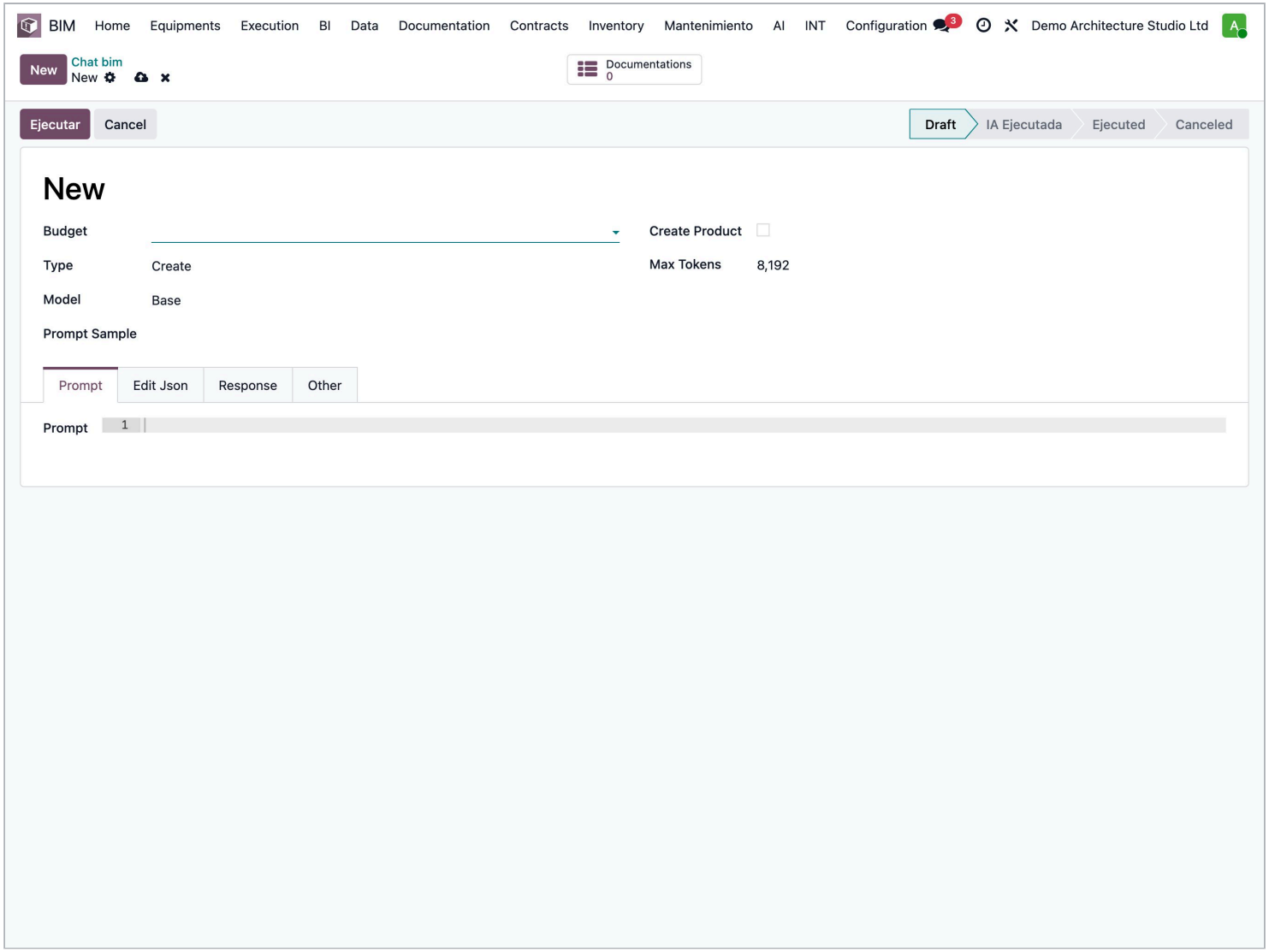
14 ChatBim

Under **AI › ChatBim** each conversation is saved as a document linked to a budget.

TYPE	PURPOSE
Create	Generate new concepts
Edit	Change existing ones
Read	Query the budget
Report	Prepare a report
Programming	Plan over time

1. Choose budget and type.
2. Under **Model** select **Other** and the configured model.
3. Write the instruction or use a **Prompt Sample**.
4. Press **Ejecutar**.
5. Review the answer. For Create, Edit and Programming, apply it to the budget.

> SITE NOTE
> Prompt samples let you save instructions you use often and share them with the team.

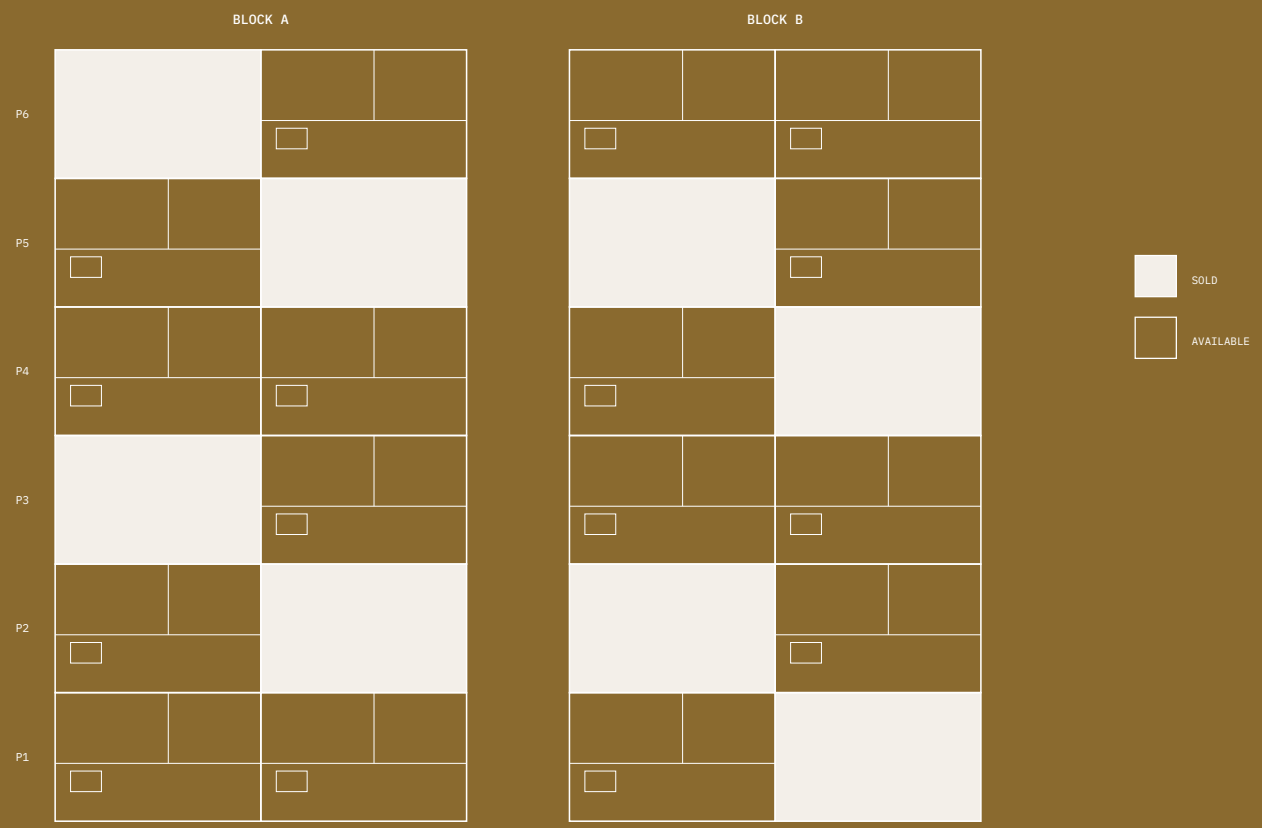


New ChatBim conversation.

15

Real estate, maintenance and portal

What happens before and after the build: selling homes, maintaining the building and keeping the client informed.



Real estate developments
Maintenance
Customer portal
CRM

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Sales plan	NTS	15/16

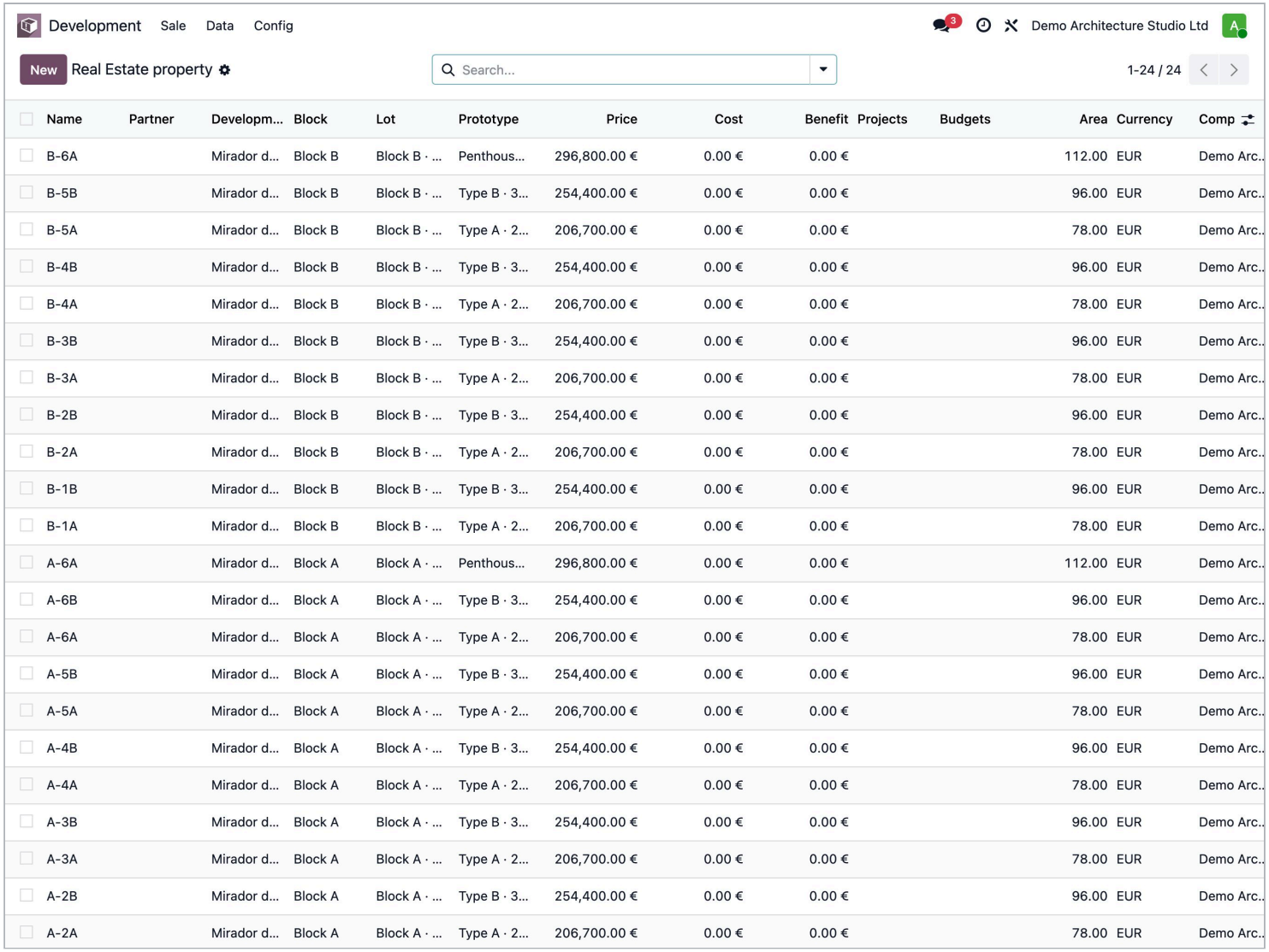
15 Real estate development

The **Development** app handles the sale of the property.

```
Development › Block › Lot › Property
```

- **Prototype**: dwelling type, with its area.
- **Property**: each unit, with price, cost and state.
- **Sale**: with its customer, instalment plan and collection forecast.

STATE	MEANING
Not available	Not on the market yet
Available	For sale
Sold	Has a buyer
Blocked	Reserved or held



Name	Partner	Developm...	Block	Lot	Prototype	Price	Cost	Benefit	Projects	Budgets	Area	Currency	Comp
B-6A		Mirador d...	Block B	Block B · ...	Penthous...	296,800.00 €	0.00 €	0.00 €			112.00	EUR	Demo Arc...
B-5B		Mirador d...	Block B	Block B · ...	Type B · 3...	254,400.00 €	0.00 €	0.00 €			96.00	EUR	Demo Arc...
B-5A		Mirador d...	Block B	Block B · ...	Type A · 2...	206,700.00 €	0.00 €	0.00 €			78.00	EUR	Demo Arc...
B-4B		Mirador d...	Block B	Block B · ...	Type B · 3...	254,400.00 €	0.00 €	0.00 €			96.00	EUR	Demo Arc...
B-4A		Mirador d...	Block B	Block B · ...	Type A · 2...	206,700.00 €	0.00 €	0.00 €			78.00	EUR	Demo Arc...
B-3B		Mirador d...	Block B	Block B · ...	Type B · 3...	254,400.00 €	0.00 €	0.00 €			96.00	EUR	Demo Arc...
B-3A		Mirador d...	Block B	Block B · ...	Type A · 2...	206,700.00 €	0.00 €	0.00 €			78.00	EUR	Demo Arc...
B-2B		Mirador d...	Block B	Block B · ...	Type B · 3...	254,400.00 €	0.00 €	0.00 €			96.00	EUR	Demo Arc...
B-2A		Mirador d...	Block B	Block B · ...	Type A · 2...	206,700.00 €	0.00 €	0.00 €			78.00	EUR	Demo Arc...
B-1B		Mirador d...	Block B	Block B · ...	Type B · 3...	254,400.00 €	0.00 €	0.00 €			96.00	EUR	Demo Arc...
B-1A		Mirador d...	Block B	Block B · ...	Type A · 2...	206,700.00 €	0.00 €	0.00 €			78.00	EUR	Demo Arc...
A-6A		Mirador d...	Block A	Block A · ...	Penthous...	296,800.00 €	0.00 €	0.00 €			112.00	EUR	Demo Arc...
A-6B		Mirador d...	Block A	Block A · ...	Type B · 3...	254,400.00 €	0.00 €	0.00 €			96.00	EUR	Demo Arc...
A-6A		Mirador d...	Block A	Block A · ...	Type A · 2...	206,700.00 €	0.00 €	0.00 €			78.00	EUR	Demo Arc...
A-5B		Mirador d...	Block A	Block A · ...	Type B · 3...	254,400.00 €	0.00 €	0.00 €			96.00	EUR	Demo Arc...
A-5A		Mirador d...	Block A	Block A · ...	Type A · 2...	206,700.00 €	0.00 €	0.00 €			78.00	EUR	Demo Arc...
A-4B		Mirador d...	Block A	Block A · ...	Type B · 3...	254,400.00 €	0.00 €	0.00 €			96.00	EUR	Demo Arc...
A-4A		Mirador d...	Block A	Block A · ...	Type A · 2...	206,700.00 €	0.00 €	0.00 €			78.00	EUR	Demo Arc...
A-3B		Mirador d...	Block A	Block A · ...	Type B · 3...	254,400.00 €	0.00 €	0.00 €			96.00	EUR	Demo Arc...
A-3A		Mirador d...	Block A	Block A · ...	Type A · 2...	206,700.00 €	0.00 €	0.00 €			78.00	EUR	Demo Arc...
A-2B		Mirador d...	Block A	Block A · ...	Type B · 3...	254,400.00 €	0.00 €	0.00 €			96.00	EUR	Demo Arc...
A-2A		Mirador d...	Block A	Block A · ...	Type A · 2...	206,700.00 €	0.00 €	0.00 €			78.00	EUR	Demo Arc...

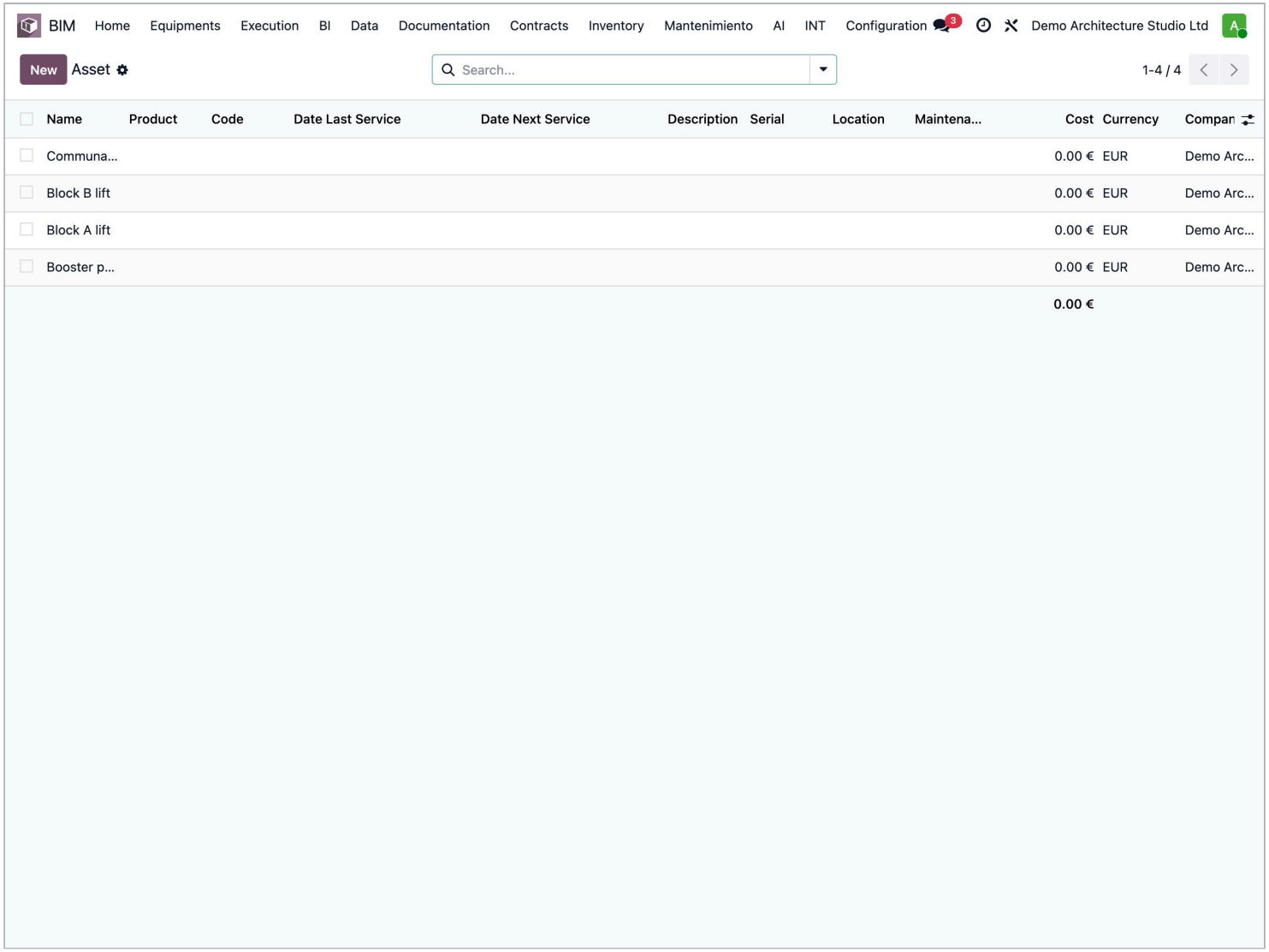
The development's 24 properties with block, prototype and area.

15 Maintenance

When the building is handed over, maintenance begins. The BIM **Mantenimiento** module works like this:

1. Define a task **plan** by location.
2. Register the **assets**: lifts, pumps, plant. Each can have a QR code.
3. Receive **requests** and turn them into work orders.
4. Carry out the order and record sub-tasks and readings.

It requires the maintenance profile.



Building assets.

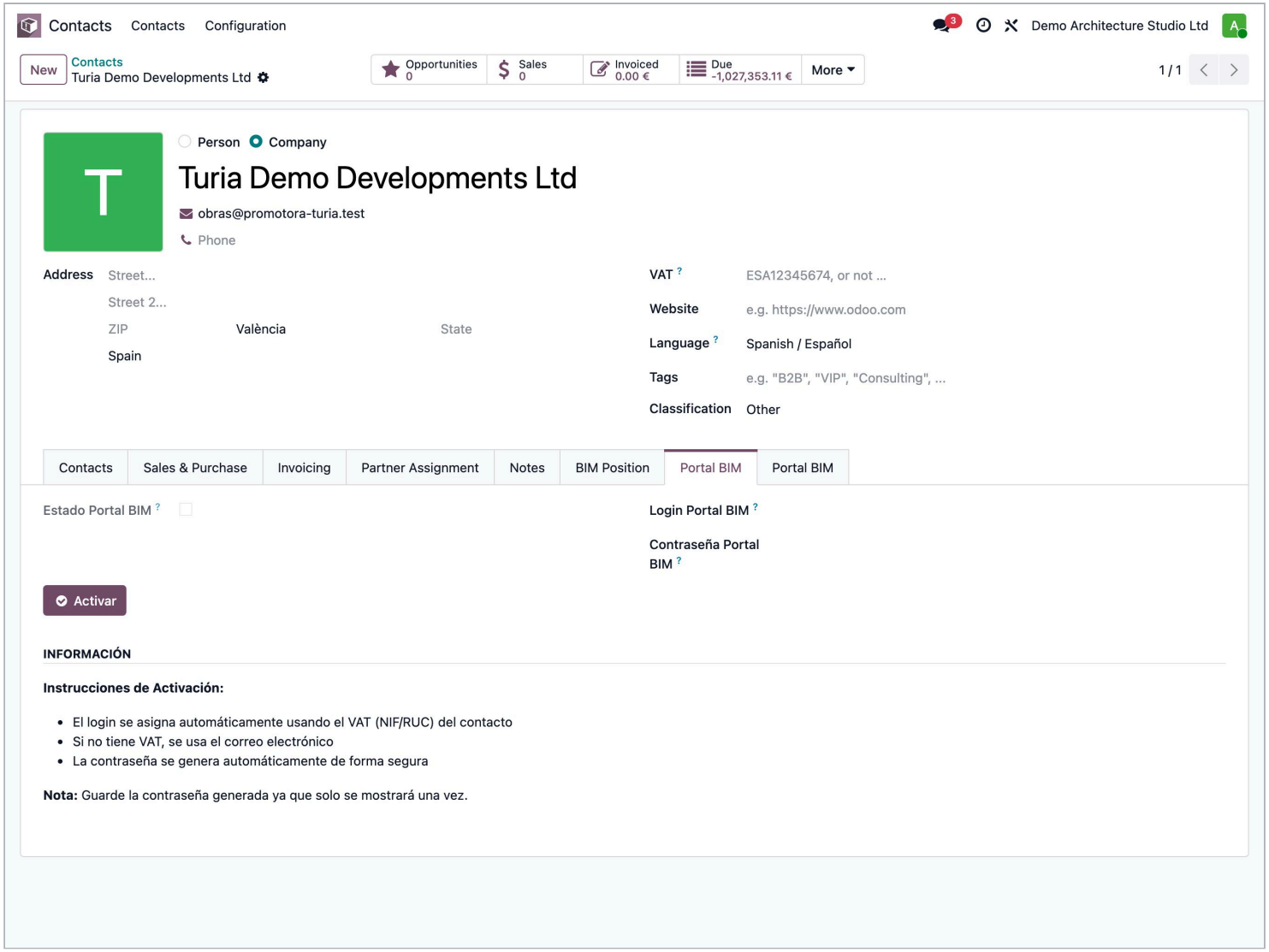
15 Customer portal

Clients can check their project online without entering Odoo.

- Their **projects** and budgets.
- Their **documents**, which they can approve or reject.
- Their **invoices**.
- Their issue **tickets**.

1. Open the customer's contact.
2. Go to the **Portal BIM** tab.
3. Press **Activar**.
4. Note the generated password: it is shown only once.

The user is the contact's tax ID or, if there is none, their email.

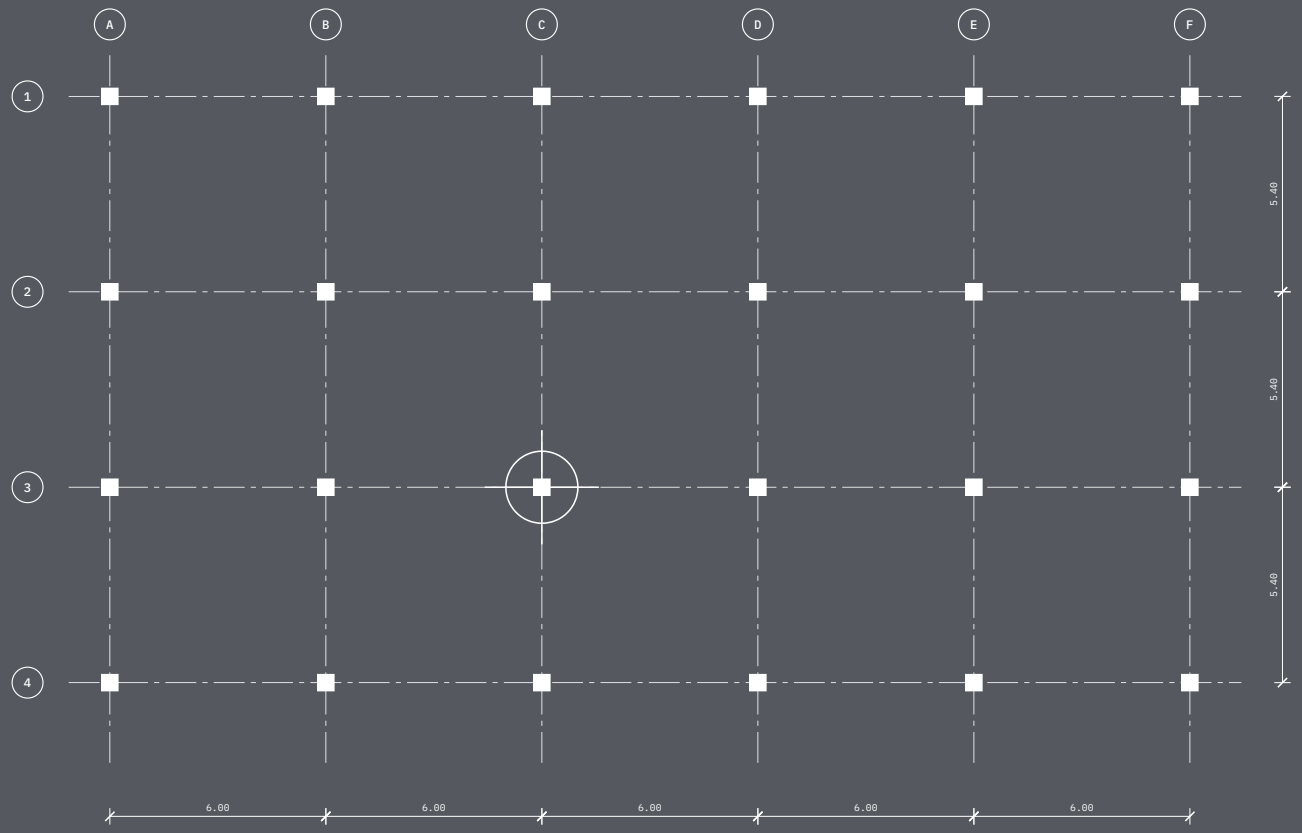


Portal BIM tab on the contact record.

16

Configuration and roles

Company settings, states and user profiles.
For the system administrator.



General settings
States
Roles and permissions
Glossary

PROJECT	SHEET	SCALE	PLATE
BIM 2.0 · User Manual	Setting-out grid	1:200	16/16

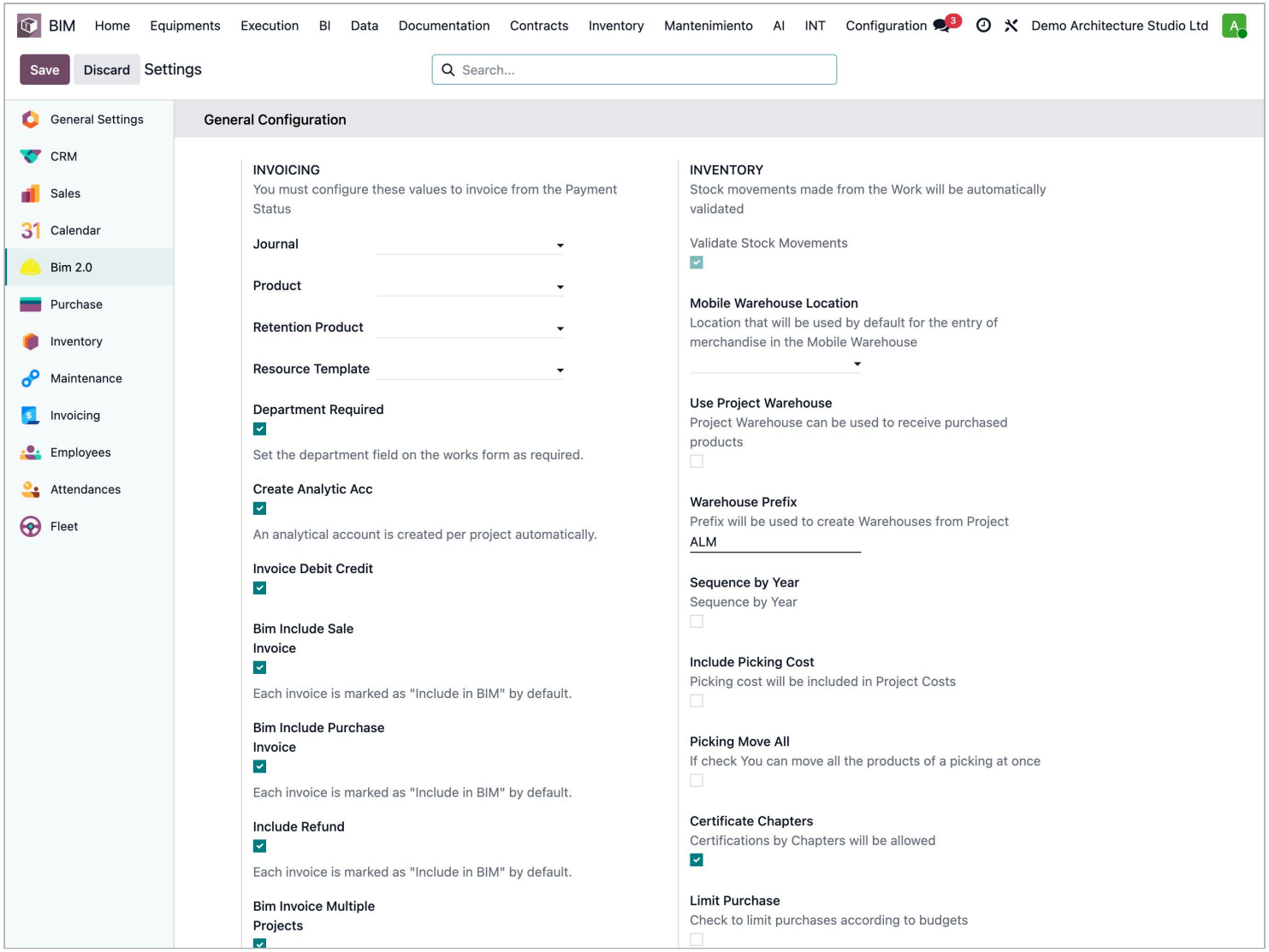
16 General settings

Under **Configuration › Settings**, in the Bim 2.0 section.

BLOCK	EXAMPLES
Invoicing	Journal, product, retention
Inventory	Site warehouse, prefix
Budget	Calculation type, price type
General	Required department, analytic account

WARNING
Keep **Create Analytic Acc** on. Without it, the project does not collect its costs (chapter 9).

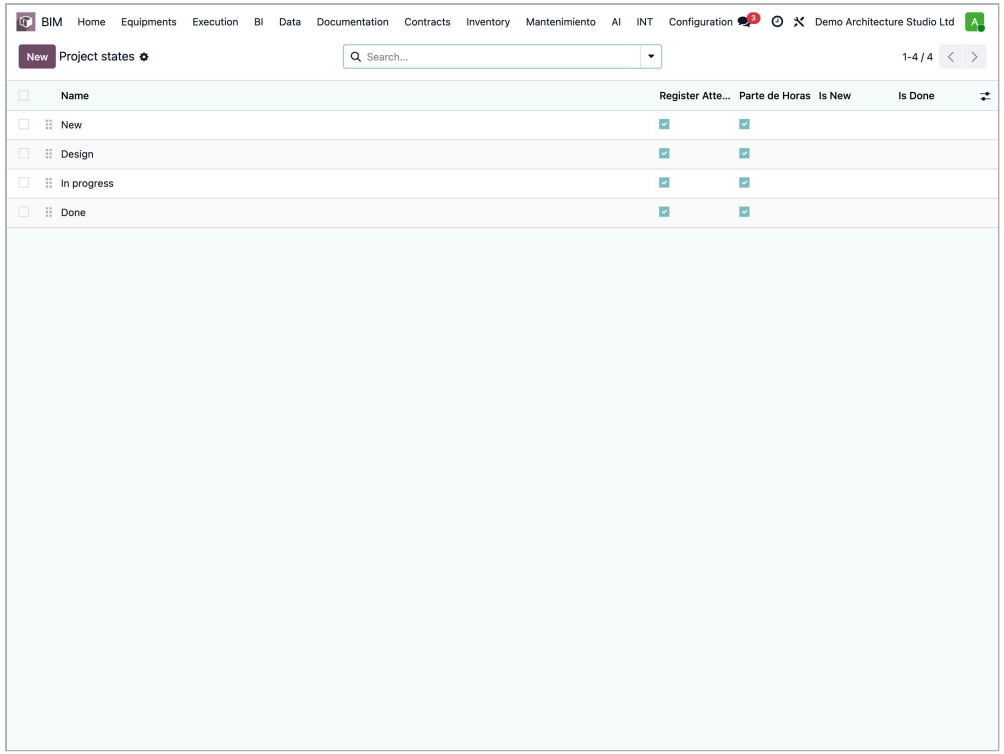
Also check **Bim Include Sale Invoice** and **Bim Include Purchase Invoice**: they set the default for Include for Bim.



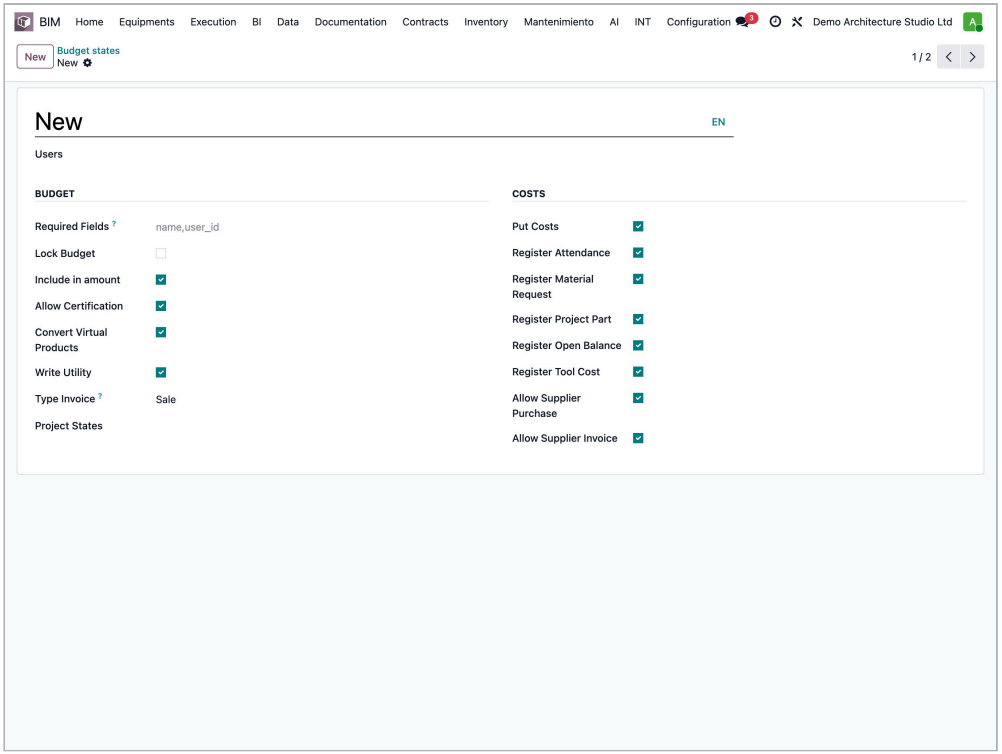
BIM 2.0 settings.

16 Configurable states

States are not just labels: they govern what can be done. A budget state can block it, allow certifications, or accept supplier invoices and purchases. They are set under **Configuration › States**.



Project states: each one enables attendance and timesheets.



Budget state: controls blocking, certification and which costs are accepted.

16 Roles and permissions

Access is granted by profiles. One person can have several.

PROFILE	GIVES ACCESS TO
BIM User see owner documents	BIM menu, own documents only
BIM User see all documents	All documents
BIM Manager	Configuration, costs and margins
Bim Costs	Costs, without being manager
BIM Certification	Certifications
BIM Paidstate	Payment statuses
BIM Valuation	Valuations and payment scheduling
Diary Part	Reports app
BIM Integrations	BC3, Revit, Autodesk
BI User / BI Admin	Dashboards: view / design
IA	Assistant and ChatBim
BIM Maintenance	Maintenance
Development User	Real estate

Take care when assigning profiles

WARNING

BIM Manager does not give access to everything. It excludes BI, AI, Maintenance, Integrations and Real Estate, which are assigned separately.

These profiles only appear on the user record, under extra rights, with **developer mode** on.

If a user cannot see something

1. Check they have the profile for that function.
2. Check the project or budget state allows it.
3. Ask them to log out and back in.

16 Glossary

TERM	DEFINITION
AC	Actual cost to date.
APU	Unit Price Analysis.
BAC	Budget at completion.
BC3	FIEBDC-3 standard exchange format.
BI	Industrial profit; in the menu, business intelligence.
Brigade	Crew in daily reports.
Chapter	Grouping that organises items. Holds no resources.
Certification	Valuation of work done in a period.
CPI	Cost performance index, EV / AC.
EAC	Estimate at completion.
ETC	Estimate to complete.
EV	Earned value: what has been certified.

TERM	DEFINITION
GG	General overheads.
H.D.	Assets and discounts.
Item	Measurable unit of work that holds resources.
PEC	Contract Execution Budget.
PEM	Material Execution Budget.
PV	Planned value.
Resource	Material, labour, equipment or subcontract.
RFI	Formal request for information.
SPI	Schedule performance index, EV / PV.
TCPI	Efficiency needed to meet the budget.
UPD	Button that recalculates amounts.
VAC	Variance at completion.

The project, complete.

From the first budget to the last certification, with every figure in its place.

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EDITION
October 2026 · BIM 2.0 on Odoo 19

