

InterAcct for Joinery



Highlights :

- ✓ InterAcct is a full integrated business and accounting system.
- ✓ As part of InterAcct's Job Costing, Estimating & Quoting system there is the optional software module suitable for "Joinery" businesses.
- ✓ This system would be ideal for companies making Kitchens, Wardrobes, or Cabinetry.
- ✓ The sales enquiry/job is tracked through each of the pre-sale and production processes to the final delivery, quality control check, and customer acceptance.
- ✓ The focus is on speed of data input, accuracy, and simplicity.

Kitchen.JOBS & ENQUIRIES DATABASE - display
 File Record Edit View Go Advanced Menu Graph Design Help

Job No	100001	Job Id	RAINBOW1	Origin	WALK-IN
Input Date	27-Mar-2008		Manual	Inv ?	N
Project Name	Kitchen - Laminate - Rainbow - Frenchs Forest				
Description					

Client Id	Contact	Clive Rainbow	New Contact	Ph	9975 4455
RAINCLFR				Fx	9975 3456
	Edit Client	15 Rodborough Road		Mob	0412 556 778
	.ddress			Site Id	900006 New Site
	Map	FRENCHS FOREST NSW 2086		Site	0407 334 556

Status.	4.WIP	Estimate \$	19,990
Category	RENO	Revenue \$	5,000.00
Job Type	KITCHEN	Follow Up	Thu 10-Apr-2008
Open Job ?	Y	Starting	Sat 12-Apr-2008
Prj Mgr	COLIN.O	Completed.	Sun 20-Apr-2008
Priority	2.NORMAL	Industry	DOMESTIC
Order No			

Menu	
1.	Kitchen Scheduling
2.	Financial Summary
3.	Job Estimating
4.	Budget/Actual/Variances
5.	Job Transactions
6.	Job Details Menu
7.	Job Notes
8.	View : Client File

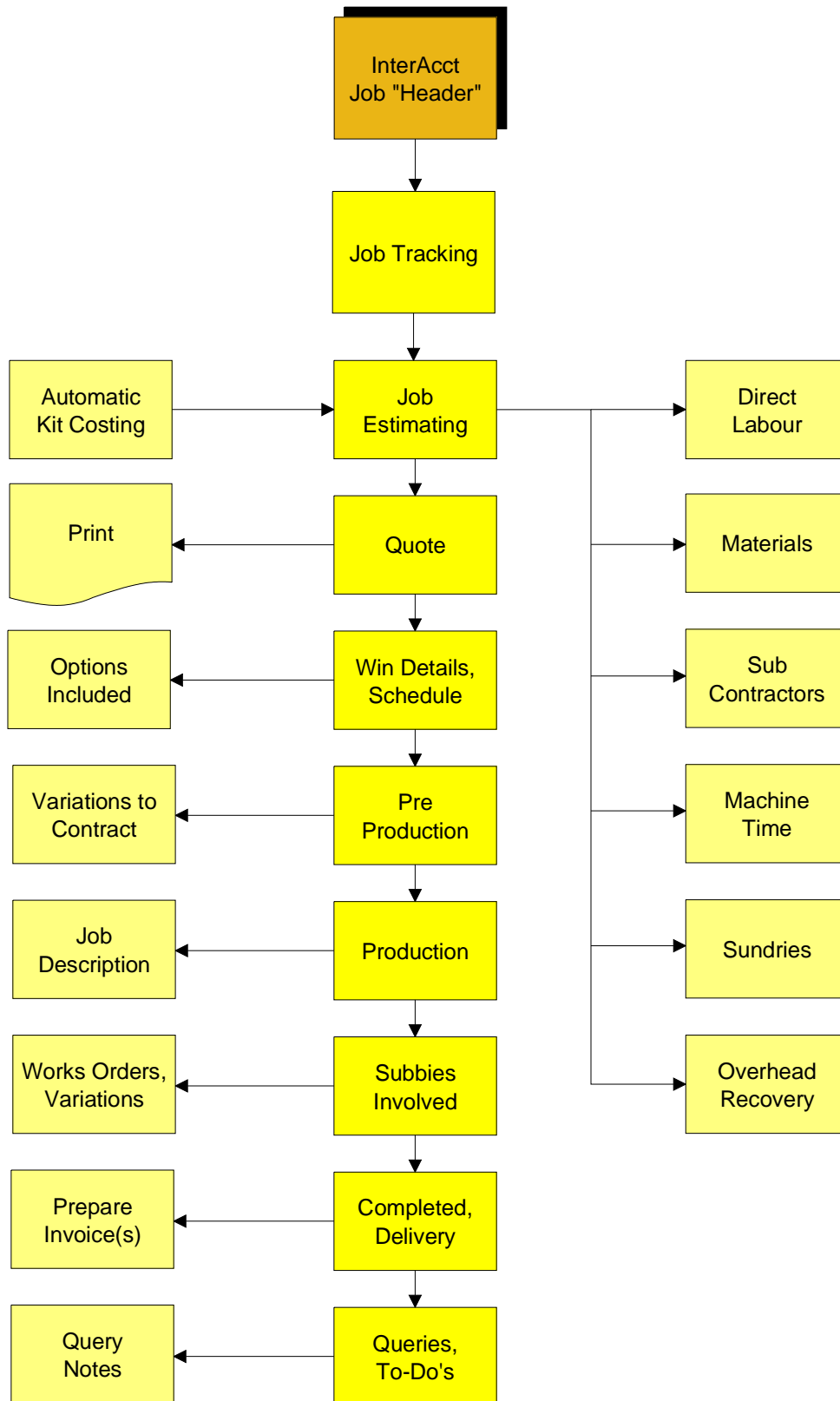
Comments

Form help | Field help | Help | Alerts | Addresses | Charge-Rates | Accounting | Tables | Messages | Reports

This is the Job Screen. This file contains details on all jobs - past, present, and future.

Via the next (lower) menu you can create a job cost estimate, a quotation for the job, and any number of sales invoices. Before attempting to add a new job, you should have already entered the prospect/customer's details under Menu [1].

A separate job register is also maintained under each customer's file.



Software Features :

- ✓ This extension to the standard InterAcct system is often personalised to suit each customer.
- ✓ The standard Job Costing, Estimating, Quoting, and Accounting systems are well described in various separate software profiles.
- ✓ The objective of this module is to track the progress of a job through all the various steps from acceptance to final completion.
- ✓ The estimating process uses the standard InterAcct system.
- ✓ One new option here is the “Quick” estimating & quoting system – where you don’t wish (or need) to do a detailed (by Cost Item) estimate or quote.
- ✓ Detailed estimating & quoting goes down to the detail of each Cost Item – Labour, Materials, Sub Contractors, Machine Usage, and various Sundry Costs.
- ✓ One additional option with estimating is to use standard “Kits” to effectively do the estimating automatically. A kit could be a list of all the cost items to make a standard cupboard.
- ✓ There are several different print formats for the Job Quotation – both summarised and detailed.
- ✓ Once the job has been “Won” the scheduling process can commence.
- ✓ Dates for a Check Measure, CAD Drawings to be completed, Purchasing Materials, Production, Quality Control Checks, etc. can all be scheduled and monitored.
- ✓ A final Pre-Production checking process and acceptance ties in the estimate, quote, CAD drawings, and scheduled dates.
- ✓ In estimating the time/cost schedule for production, it can be broken down into Cutting (carcasses/doors), Edging, Finishes, Assembly, Cleaning, and Quality Control.
- ✓ There is the link from the job to create Works Orders for any outwork by Sub Contractors.
- ✓ Variations to Contract can also be recorded. Standard Job letters can be produced to confirm Extension of Time, Scope Changes, and Rise & Fall variations.
- ✓ Documents can be attached to the job. These might be MS-Word documents (contracts), pdf files, photo images, or CAD drawings.
- ✓ Queries (tasks to be completed) can be recorded and assigned to employees/subbies to complete.
- ✓ There are a number of different sales invoicing print format options to choose from.
- ✓ The final delivery & installation can be scheduled. It might be that the Manager wants to “Meet and Greet” the happy customers after the job has been completed and paid for – a “Gift Ceremony”.
- ✓ The “Scheduling Menu” allows you to oversee the status off all jobs ‘in the system’ to see where scheduled and actual dates are at variance and costs are exceeding the job budget.
- ✓ The system’s standard files, fields, menus and reports can all be personalised to suit individual requirements.

Kitchen.JOB SCHEDULE MENU - display , Kitchen - Laminate - Rainbow - Frenchs Forest, KITCHEN,

File Record Edit View Go Advanced Menu Graph Design Help

Job Name Kitchen - Laminate - Rainbow - Frenchs F **Job No** 100001
Details 16 Cupboards, No Appliances, Benchtop **Status** 09.CADDON
Site Address 15 Rodborough Road **Installer** AJ-KIT
Site Details FRENCHS FOREST NSW 2086

Estimate \$ 19,990.00 **Estimated** Thu 27-Mar-2008
Quote \$ 12,000.00 **Quoted** Wed 26-Mar-2008
Factory \$ 9,800.00 **Exp Close**
Reqd By Tue 1-Apr-2008
Won Date Thu 27-Mar-2008
Contract \$ 12,000.00 **Chk/Meas** Sun 30-Mar-2008
Var Cont \$ 0.00 **CAD Due**
Adj Sum \$ 12,000.00 **CAD Done** Thu 3-Apr-2008
Final Chk
Invoiced \$
To Be Inv \$ 12,000.00 **Purchases**
Prodn Start
Completed Sun 20-Apr-2008
Installed
Finalised
Last Inv **MD Mug**

Menu

1. Step 1 : Input Estimate
2. Step 2 : Win Details
3. Step 3 : Pre-Production
4. Step 4 : Production
5. Step 5 : Subbies Involved
6. Step 6 : Delivery/Complete Job
7. Step 7 : Query Details
8. Job Totals Menu
9. View : Customer File
10. Print : Profile

Form help Field help Accounting Variations Appointments

Kitchen.Status list - Job Stage Status

Stage/Status	Description
1	Enquiry
2	PreSales - Appointments, Visits Etc
3	Quotation Done and Sent to Client
4	Job Won
5	Deposit Received
6	Check Measure Sent
7	Check Measure Done
8	CAD Drawing Sent
9	CAD Drawing Done
10	Final Check of Plans
11	Sent to Production Planner and Client
12	Bill of Quantities Returned
13	Production Schedule Completed
14	Organised Subbies
15	In Production
16	Materials Delivered Awaiting Install
17	Installation on Site.
18	Re-Inspect Work Done
19	Job Completed Not Invoiced
20	Invoiced
21	Job Completed
22	Mug Presentation & Photo Shoot
23	Job Queries/Problems on Site
24	Jobs Lost

Kitchen.PRODUCTION DETAILS - display , Kitchen - Laminate - Rainbow - Frenchs Forest, KITCHEN,

File Record Edit View Go Advanced Menu Graph Design Help

Sch Prodn Start Date Sun 13-Apr-2008 Job Stage Status , Production 13.PRODSCH

Task	Sch Date	Hours #	Comments	no. Cabs
Cut Carcus	14-Apr-2008	1.25		3
Cut Doors	14-Apr-2008	2.50		
Edging	15-Apr-2008	1.00		
Assembly	16-Apr-2008	3.50		
Finish Off	16-Apr-2008	1.50		
Q.C	17-Apr-2008	0.50		
Clean	18-Apr-2008	0.50		
Buffer Day	19-Apr-2008	1.00	Contingency	
Total #		11.75		
Cost \$				293.75

Scheduled Delivery Date Mon 21-Apr-2008 **Actual**
Scheduled Installation Tue 22-Apr-2008 **Actual**
Client Advised date Mon 14-Apr-2008 **Installer** AJ-KIT

Menu

1. Input : Subbies
2. Messages & Appointments
3. Job Description
4. Contact History - Follow Ups

Business Contacts Database
 Jobs & Enquiries Database
 Job Scheduling Menu
 Accounting Transactions
 Getting Started...
 Search & Analysis Menu
 Messages & Appointments

Kitchen.SCHEDULES MENU - display

File Record Edit View Go Advanced Menu Graph Design Help

Menu

1. Kitchen Schedule
2. Pre Sales Schedule
3. Sales Dept Schedule
4. Proposal Schedule
5. Jobs Won Schedule
6. Bill of Qty's Schedule
7. Factory Schedule
8. Production Schedule - Capacity Plan
9. Production Scheduled - By Dept
10. Queries Schedule
11. Installation Schedule
12. Capacity HTML Routine
13. Quick Reports

Kitchen.JOB SCHEDULE MENU list

File Record Edit View Go Advanced Graph Design Help

	Job No	Job Name	Customer	S/person	Quote \$	Contract \$	Estimated	CAD Due	Quoted	Exp Close	Reqd
1	100001	Kitchen - Laminate - Rainbow - F	Rainbow. Cliv	N/A	12,000.00	12,000.00	27-Mar-2008		26-Mar-2008		1-Apr
					12,000.00	12,000.00					

Kitchen.BUSINESS NAMES DATABASE - display

File Record Edit View Go Advanced Menu Graph Design Help

Business Contacts Database

Jobs & Enquiries Database

Job Scheduling Menu

Accounting Transactions

Getting Started...

Search & Analysis Menu

Messages & Appointments

Reports, Letters

Record Id: RAINCLFR Type: F Individual 1st Added: 27-Mar-2008

Title: Mr 1st Name: Clive Dear?: Clive

A/c Mgr: N/A Surname: Rainbow Last Date: 27-Mar-2008

Next Date: 27-Mar-2008

Last Inv: 21-Apr-2008

Ph Area: 02 Address: 15 Rodborough Road

Bus Ph: 9975 4455 Suburb: FRENCHS FOREST NSW P/C 2086

Fax No: 9975 3456 Country: Branch: HO

Mobile: 0412 556 778

After Hrs: Status: CLIENT Cust Type: DOMESTIC

Category: 3.SMALL Overdue \$: 0.00

Origin: WALK-IN Balance \$: 5,500.00

Email: clive@interacct.com.au

Web Site: www.interacct.com.au

Comment: Kitchen required

Menu

1. Client Jobs, Enquiries
2. Debtor's Information
3. Notes File
4. Delivery Addresses
5. Contact Names
6. Contact History
7. Create Report Designs

Form help Field help Documents Jobs Accounting Search Tables Messages Suburbs Reports

Kitchen.CLIENT JOBS & ENQUIRIES list , Rainbow, Clive

File Record Edit View Go Advanced Graph Design Help

	Job No	Input Date	*Job Name	Address	Status	Category	Priority	Prj Mgr	Revenue \$
1	100001	27-Mar-2008	Kitchen - Laminate - Rainbo	15 Rodborough	4.WIP	RENO	2.NORMA	COLIN.O	5,000.00
									5,000.00