



**InterAcct**  
SOFTWARE PTY LTD

## Follow Up on Quotes

A simple suggestion was made to us. "Can we have a follow up date on Sales orders that links back to the Follow Up Diary file?"

Being able to attach follow up dates is common throughout the InterAcct system, and these typically update both a client/prospect's Contact History Diary record, as well as the Follow Up Diary itself.

This same follow up date field has been now added to the Sales Quote/Invoice file. Using the standard Search facility, you can also list all quotes/orders between a range of follow up dates – combining that style of search (maybe) with a search by Salesperson, Branch, \$ Value, Origin, etc .

The screenshot shows the InterAcct Master software interface. The main window is titled "InterAcct Master - [QUOTES, ORDERS, INVOICES - display]". It features a menu bar (File, Record, Edit, View, Go, Advanced, Menu, Graph, Design, Help) and a toolbar with various icons. The interface is divided into several sections:

- Client Information:** Client Id (ELECTRAL), Contact (Larry Johns), Business Address (Electrical Contractors Pty Ltd, Unit 4, 20 O'riordan Street, ALEXANDRIA NSW 2015), Job (N), Delivery (1.MAIN).
- Order Details:** Ref No. (200008), Status (1.QUOTE), Order Date (1-Mar-2010), Exp Delivery (1-Mar-2010), Pick Date, Invoiced, Exp Payment (1-Mar-2010), B/O Release.
- Financial Summary:** Products \$ (0.00), Services \$ (90.00), Sales \$ (90.00), B/Order \$ (0.00), Invoiced \$ (99.00), Receipts \$ (0.00), Adjustment \$ (0.00), Balance \$ (99.00). Cust O/N, Sale Type (DIRECT), Cust Type (CONTRACTOR), W/House (HO), Branch (HO), Gross Prt \$ (30.00), Net Profit \$ (21.00), Margin % (33.33).
- Follow Up:** 7-Mar-2010, S/person (N/A).
- Menu:** 1. Sell Items, 2. Comments, 3. Cash Receipts, 4. Print Menu, 5. Change: Order Status, 6. View : Client File.
- Navigation:** Client, Addresses, Contacts, History, Google Map, Directions, Stock, Suppliers.
- Invoice Line Items Table:**

Description	Status	Order Qty#	In-Stock#	Ship #	Sales \$	Invoice \$	Margin %	Comments
1 Specialist Electrical Item	1.QUOTE	20.000		20.000	90.00	99.00	33.33	Minumum Order Qty is 20

