

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

5

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

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

Menu

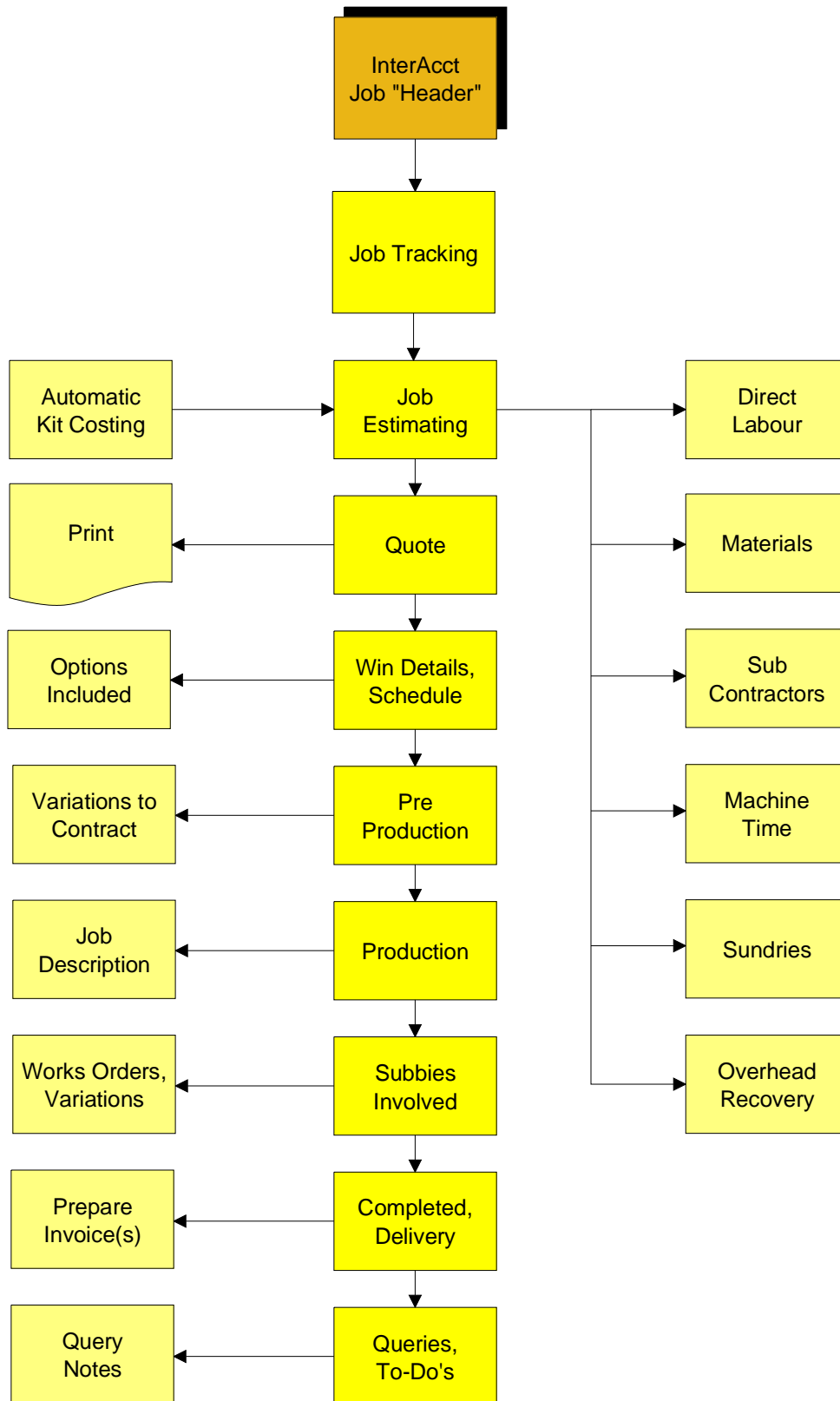
1. Kitchen Scheduling
2. Financial Summary
3. Job Estimating
4. Budget/Actual/Variances
5. Job Transactions
6. Job Details Menu
7. Job Notes
8. View : Client File

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
 Details: 16 Cupboards, No Appliances, Benchtop
 Site Address: 15 Rodborough Road
 Site Details: FRENCHS FOREST NSW 2086

Job No: 100001
 Status: 09.CADDON
 Installer: AJ-KIT

Estimate \$: 19,990.00 Estimated: Thu 27-Mar-2008
 Quote \$: 12,000.00 Quoted: Wed 26-Mar-2008
 Factory \$: 9,800.00 Reqd By: Tue 1-Apr-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
 Invoiced \$:
 To Be Inv \$: 12,000.00
 Last Inv: Finalised: MD Mug

Menu

- Step 1 : Input Estimate
- Step 2 : Win Details
- Step 3 : Pre-Production
- Step 4 : Production
- Step 5 : Subbies Involved
- Step 6 : Delivery/Complete Job
- Step 7 : Query Details
- Job Totals Menu
- View : Customer File
- 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,
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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
 Scheduled Installation: Tue 22-Apr-2008
 Client Advised date: Mon 14-Apr-2008
 Actual:
 Actual:
 Installer: AJ-KIT

Menu

- Input : Subbies
- Messages & Appointments
- Job Description
- Contact History - Follow Ups

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 | Requ |
|---|--------|----------------------------------|---------------|----------|-----------|-------------|-------------|---------|-------------|-----------|-------|
| 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 |