

# Call Report – Work Ticket



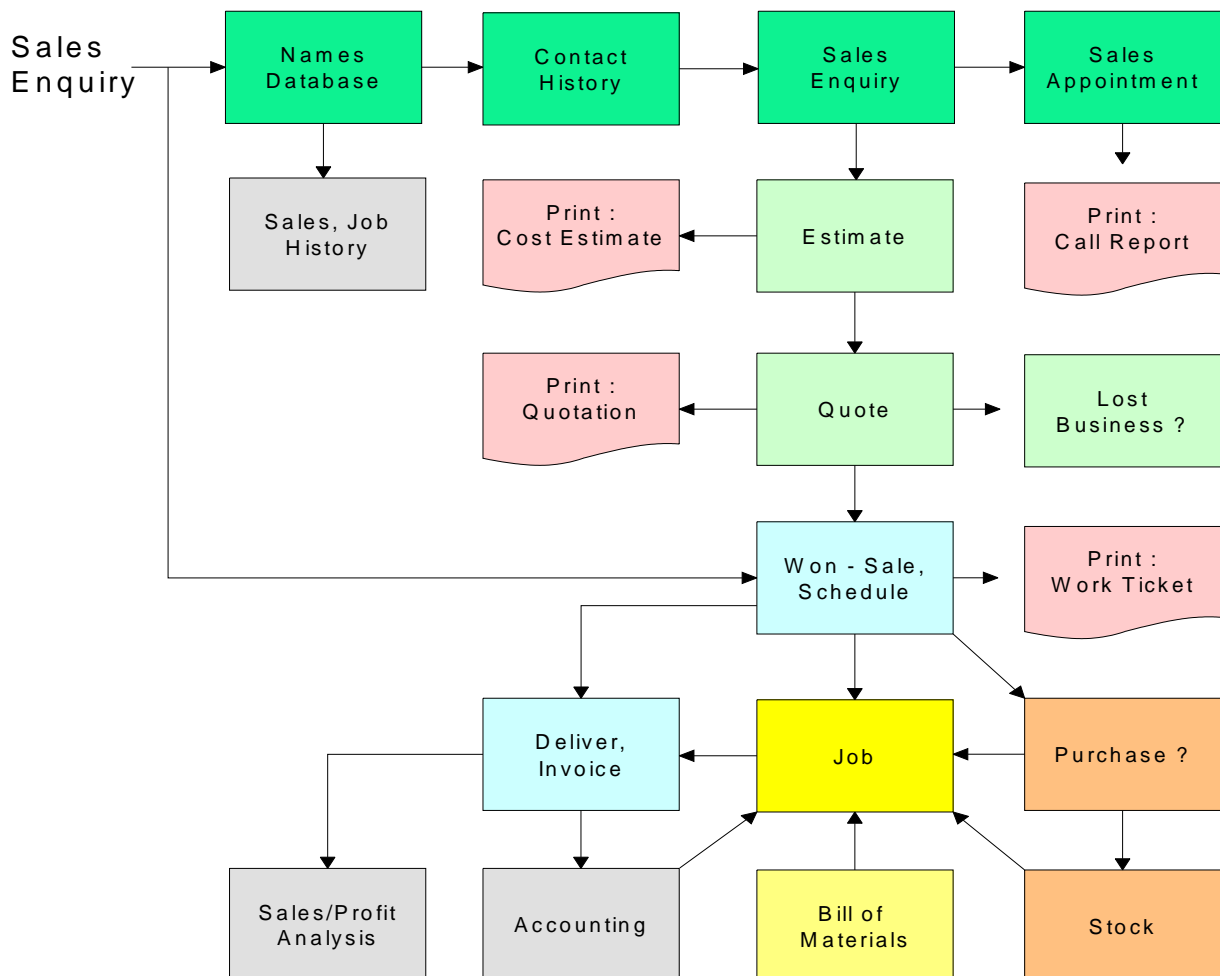
**InterAcct**  
SOFTWARE PTY LTD

Within the InterAcct system there are many ways to produce a printed report on selected information. Most reports can be run from a simple menu – at the point when you need them. Others you can ‘configure’ the amount of information (files) you wish to print – each time. And there are also report “generators” that allow you to create entirely new report designs of your own.

Two new/revised reports are now included within InterAcct – in relation to Jobs.

One can be used during the process of entering a new (job related) sales enquiry. After entering the Prospect’s Name & Address details (if not already on the database), you input the job sales enquiry, and then the sales appointment details (to visit the client ?). At that point you can print out a Call Report.

Once (and if) the sales enquiry is converted into a “Won Job”, you can print a Work Ticket. Again, the print layout of these reports can be personalised to suit (if required).



InterAcct Live - [JOBS & ENQUIRIES DATABASE - display]

File Record Edit View Go Advanced Menu Graph Design Help

Job No	100014	Job Id	REMINFBR.10001	Input Date	19-May-2010
Status	4.WIP	Job Type	CONSTRUCT	Starting	24-May-2010
Category	NEW	Order No	5455B	Completed	
Prj Mgr	GEOFF.L	Origin	REFERRAL	Follow Up	25-May-2010
Priority	2.NORMAL	Inv ?	N	Estimate \$	188,500

Contact	Robert Remin	Phone	9905 8705
Client	Remin Furniture	Mobile	
Site	Unit 5/6 Grosvenor Place	Site Ph	
Address	BROOKVALE DC NSW 2100	Cr Limit \$	0
		Cr Status	2.MEDIUM

**Menu**

1. Site Checklist
2. Open Job - Schedule
3. Financial Summary
4. Quick Estimate/Quotes
5. Detailed Estimating
6. Quotation
7. Budget/Actual/Variances
8. Transactions & Processes
9. Job Notes
10. Configure Job Reports
11. View : Job Transactions

Project: Extension to Factory Unit  
 Comments: Storage Area, and Spray Booth

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

This shows a typical "Job Header" Sales Enquiries can be entered as a "Job" either under the Client/Prospect file, or directly off the InterAcct Main Menu.

- New (Prospect) names can be entered into the Names Database 'on the fly' as you input a new job sales enquiry.
- One Client can have multiple Site/Delivery addresses. These also can be entered 'on the fly' – along with new Contact Name details.
- As you can see, each job sales enquiry can be classified according to its' Status, Category, and Job Type (useful later when searching, analysing & reporting).

# Job Transactions & Processes

InterAcct Demo - [JOB PROCESSES - ENQUIRIES - display , Repair Existing Road and Extend 112 Metres, CIVIL, Bribi]

File Record Edit View Go Advanced Menu Graph Design Help

**Menu**

<b>ESTIMATE/QUOTE/BUDGET :</b>		
1. Quick Estimate/Quote		
2. Detailed Estimating/Quoting		
3. Quotations		
4. Budget by Phase		
5. Budget Summary		
<b>MANUFACTURING :</b>		
6. Production Plan		
7. Manufacturing Menu		
8. Operations - Schedule		
<b>OPEN JOB - CONTRACT :</b>		
9. Open Job - Schedule		
10. Job Site Details		
11. Schedule Employees		
12. Contracts/Billing		
13. Contract Variations		
<b>INVOICING :</b>		
14. Progress Claims		
15. Sales Invoices		
16. Periodic Invoicing		
17. Credit Notes		
<b>COST TRANSACTIONS :</b>		
18. Required to Purchase		
19. Purchase Orders		
20. Auto Purchase Orders		
21. Reserve Stock		
22. Stock Issues		
23. Auto Stock Issues		
24. Auto Kit Issues		
25. Works Orders		
26. Auto Works Orders		
27. Subbie's Claims		
28. Creditor Invoices		
29. Quick Timesheets		
30. Timesheet Entry		
31. Expense Recovery		
<b>PROCESSES :</b>		
32. Job Notes		
33. Reminder Letters		
34. Print Job Letters		
35. Contact History		
36. Alert System		
37. Work Schedule		
38. Tasks to Complete		
39. Make Appointments		
40. Document Register		
41. Drawings Register		
42. Tools by Job		
43. Query Sheets		
44. Emails Sent/Received		
45. Other Parties Involved		
46. Writeoff Revenue		
47. Bank Guarantees		
48. To Be Invoiced Later		
49. Sales Commissions		
50. Request for Quotes		
51. Request for Trades		
<b>VISUAL SEARCH ENQUIRIES :</b>		
52. Financial Summary		
53. Job Cost Ledger		
54. Phase Summary		
55. Cost Summary		
56. Cost Group Summary		
57. Cost Item Summary		
58. Job's Purchase Orders		
59. Job's Works Orders		
60. Hours Written Off		
61. Monthly Billings/Profit		
<b>REPORTS :</b>		
62. Job Budget Report		
63. Configure Job Reports		
64. Transaction Report		
65. By Phase, with Budget		
66. By Phase, No Budget		
67. Cost Monitoring Report		
68. Job Reports Menu		
69. Lost Job Details		
70. Close off Job		

Form help Field help Contract-Admin Charge-Rates Tools Accounting Getting-Started Set-Up

This menu attempts to give you direct access to all the files in relation to a single job.

The menus will change - depending on the software modules you have purchased, and how your system has been configured.

- The "Sales Appointment" can be entered under Menu 39.
- This is where you can also print the (new) "Call Report" – Menu 68. See on the next page.



<b>Work Ticket No : 100001</b>			Page: 1
<b>Operator</b>	<b>Date</b>	<b>Time</b>	
CVR	11/04/2008	12:31:00	

*** Client Details ***			
<b>Bill To</b>	Corporate Enterprises Pty Ltd		
<b>Contact</b>	Alina Milne		
<b>Address</b>	3/556 Andrews Road , Cnr Wetherill Street MOSMAN NSW 2088		
<b>Site Ph</b>		<b>Cust Ph</b>	9995 3322
<b>FAX</b>	9995 6778	<b>Mobile</b>	0413 556 776
<b>Category</b>	NEW	<b>Order No</b>	5454
<b>Priority</b>	2.NORMAL	<b>Expected</b>	ZZ
<b>Start</b>	16/04/2008	<b>Required by</b>	16/04/2008
<b>Project Mgr</b>		<b>Job Est</b>	1250

*** Job Details ***	
<b>Project Name</b>	Goodman Fielder - On-Line Machine - Bread Making, SERVIC
<b>Description</b>	Tow Hitch Assembly, 2inch Pin Low Profile Tandem
<b>Comments</b>	Test Job

*** Job Notes ***
This is a free format description area for this job.
You can enter as much information here as you want, and in addition, cut & paste text from other documents, emails, etc.

*** Time Sheet ***						
Date	Employee	Type	Normal	1.5x	Total	Comments

## InterAcct Main Menu

Clients & Prospects	Jobs, Manufacturing	Stock Database	Accounting	Search & Analysis	Reporting
Job History	Estimating, Quotations	Multiple Warehouses	Purchasing (Auto ?)	Locate Names	Financial Reports
Debtor's Info	Service History	Multiple Price Levels	Creditors, Subbies	Follow Up Diary	Report Configurator
Contact Names	Won Job, Schedule	Multiple Suppliers	Accruals, Journals	Work Schedules	Report Generators
Notes	Manufacture	Also Known As	Payroll, Timesheets	Activity Analysis	Letters, Labels
Contact History	Budget Variances	Serial, Batch No's	General Ledger	Executive Summaries	Selective EMail
Send EMail	Committed Costs	Bill of Materials	GST, BAS Report	Revenue Analysis	Export, Import
Delivery Addresses	Claims, Billing	Kit Bundles	EFT Payments	Trends & Exceptions	Aged Analysis
Profit Analysis	Profit Analysis	Profit Analysis	Bank Rec.	Document Register	Sales, Profits