



InterAcct
SOFTWARE PTY LTD

Task Checklists

This recent (free of charge) software enhancement improves the use of Task Checklists in relation to Jobs/Projects, and is particularly relevant to –

- Construction Building Industry
- Contracting Industry
- Joinery Industry
- Engineering

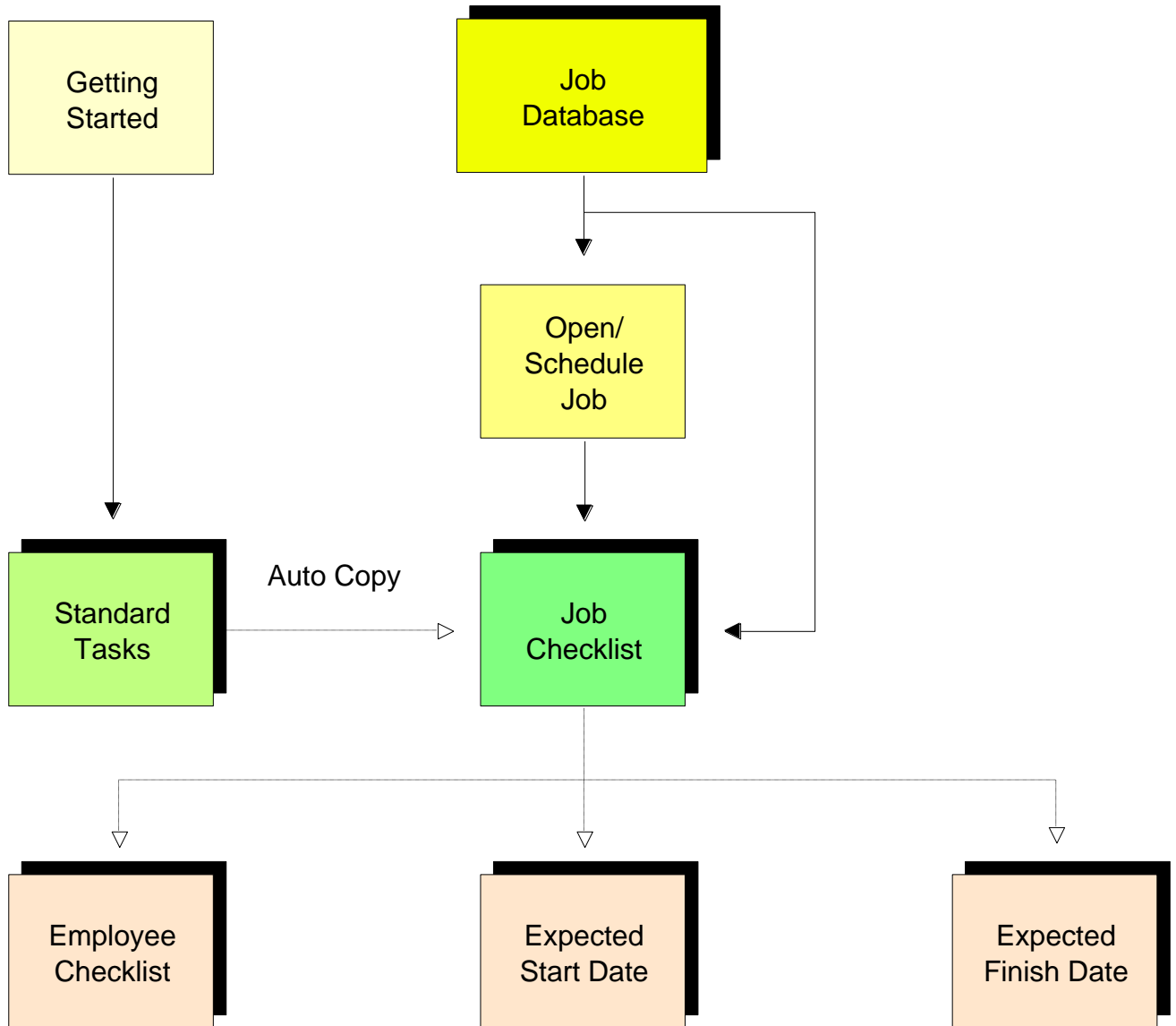
It allows you create a list of standard tasks to be performed in relation to a job, and in the correct timing sequence.

A priority classification, and expected time to complete each task can be added.

Once a job is “Opened”, then this Task Checklist is automatically copied across to each job. The details of expected start and finish dates can then be added. Schedules by these dates, and by employee are available as search enquiries.

The screenshot shows the InterAcct software main menu. The title bar reads "InterAcct IA-Demo - [INTERACCT MAIN MENU - display]". The menu bar includes "File", "Record", "Edit", "View", "Go", "Advanced", "Menu", "Graph", "Design", and "Help". The toolbar contains various icons for navigation and actions. The main area displays a grid of icons for different functions: Company Names, Phone Numbers, Work Schedules, Reminders, Manuals, System Design, Surnames, Email Addresses, Task Schedules (with a tooltip "To-Do task Schedules - job related."), Diary Alerts, Videos, First Names, By Post Code, Quote Register, Questions/Answers, and Exit InterAcct. A "Licenced Owner" field shows "*INTERACCT SOFTWARE PTY LTD *LICENCE# T1000". The date and time are "Fri 30-Jun-1995 08:29:12". A "Menu" list is visible on the right, with "3. Enquiries/Jobs" highlighted. The bottom bar contains links for "Form help", "Field help", "Reports", "Contact-Us", "Suburbs", "Training", "Quick-Start", "Getting Started", and "Reminder". The status bar at the bottom says "Welcome to the InterAcct Software - Main Menu".

Flow Chart



Getting Started

The screenshot displays the InterAcct IA-Demo software interface. The main window is titled "InterAcct IA-Demo - [QUICK START MENU - display]" and features a menu bar (File, Record, Edit, View, Go, Advanced, Menu, Graph, Design, Help) and a toolbar with various icons. Below the toolbar is a "QUICK START MENU" with five icons: Debtors, Creditors, Inventory, Jobs Menu, and Accounting.

A secondary window titled "JOB TASK CHECKLIST list" is open, showing a table with the following data:

	Seq No	Task Description	Employee	Exp Time	Priority	Notes
1	10	Home Warranty Insurance	BRAD.D	0.00	MEDIUM	\$10m Cover
2	20	Completed Job Checklist	BRAD.D	0.00	MEDIUM	
3	30	Plans to Council	BRAD.D	0.00	MEDIUM	
4	40	Council Approval	BRAD.D	0.00	MEDIUM	
5	50	Check Measure	BRAD.D	0.00	MEDIUM	
6	60	Order Materials	BRAD.D	0.00	MEDIUM	
7	70	Arrange Sub Contractors	BRAD.D	0.00	MEDIUM	
8	80	Issue Materials to Job	BRAD.D	0.00	MEDIUM	
9	90	Manufacture	BRAD.D	0.00	MEDIUM	
10	100	Quality Control Check	BRAD.D	0.00	MEDIUM	
11	110	Send Invoice to Client	BRAD.D	0.00	MEDIUM	
12	120	Arrange Delivery & Installation	BRAD.D	0.00	MEDIUM	
13	130	Payment Received ?	BRAD.D	0.00	MEDIUM	
14	140	Installation Completed & Checked	BRAD.D	0.00	MEDIUM	
15	150	Standard Thank you Letter Sent	BRAD.D	0.00	MEDIUM	
16	160	Sales Lead Referral Contact Made	BRAD.D	0.00	MEDIUM	

Please Note :

- The "Sequence Number" will determine your Sort Sequence for Tasks
- A default Employee Code can be attached to tasks (optional)
- The expected time to complete each task can be added (optional)
- A Priority classification can be added to each task (High, Medium, Low)
- Notes to be added also, if required.

Job “Header”

InterAcct IA-Demo - [JOBS & ENQUIRIES DATABASE - display]

File Record Edit View Go Advanced Menu Graph Design Help

Job No	100004	Job Id	BUSINEBA.10000	Input Date	23-Sep-2011
Status	4.WIP	Job Type	SECURITY	Starting	4-Nov-2011
Category	NEW	Order No	1221	Completed	
Prj Mgr	BRAD.D	Origin	T/MARKET	Follow Up	
Priority	2.NORMAL			Estimate \$	1,500

Contact	Peter Johnson	Phone	9566 7777
Client	Business Resources Pty Ltd	Mobile	
Site	450 Milperra Road	Site Ph	0413 556 778
Address	BANKSTOWN NSW 2200		

Supply ?	INSTALL	Branch	HO
Cr Status	2.MEDIUM	Cr Limit \$	3,901
Project	Boardroom Furniture, Office Desks, Reception Area		
Comments	A Complete Design, Construct and Fit Project		

Menu

1. Make Appointments
2. Financial Summary
3. Quick Estimate/Quotes
4. Detailed Estimating
5. Budget/Variations
6. Site Checklist
7. Questions & Answers
8. Quotations
9. Open Job - Schedule
10. Transactions & Processes
11. Configure Job Reports
12. View : Job Transactions
13. Print : Job Work Ticket

View Client

Contacts

Job-Types

Addresses

Documents

Map

Directions

Manual

Video

Form help Field help Alerts Answers Rates Accounting Tables Diary Job-Types Reports

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

Please Note :

- Once a new job has been created, you can optionally Make an Appointment in the Diary (site visit ?)
- You can create a “Quick” or detailed Cost Estimate
- You can create a Quotation to the Prospect (various options here)
- You can add information on the Site details (including OH&S implications)
- You can add free format Job Notes
- Once you have “won” the job, you select “Open Job” (menu [9] in this example)

Open Job - Schedule

InterAcct IA-Demo - [SCHEDULE JOB - display , Boardroom Furniture , Office Desks , Reception Area , SECUR]

File Record Edit View Go Advanced Menu Graph Design Help

Status: 4.WIP Date Won: 3-Nov-2011 Job Type: SECURITY
 Basis: CONTRACT Contract #: 1221 Branch: HO
 Employee: BRAD.D Quote No: Region: N.SYD.STH
 Name: Brad Deniston Priority: 2.NORMAL S/Person: MARK.W

Estimating Quote

JOB CHECKLIST list , Boardroom Furniture , Office Desks , Reception Area , SECUR

File Record Edit View Go Advanced Graph New Design Help

	Task Description	Employee	Exp Start	Exp Finish	Exp Hrs #	Priority	Act Start	Act Finish	Act Hrs #	Completed By	Notes
1	Home Warranty Insurance	BRAD.D	4-Nov-11	5-Nov-11	2.20	MEDIUM	5-Nov-11	6-Nov-11	1.50	JIM.R	\$10m Cover
2	Completed Job Checklist	BRAD.D	4-Nov-11	4-Nov-11	0.50	MEDIUM			0.00		
3	Plans to Council	BRAD.D	5-Nov-11	5-Nov-11	0.00	MEDIUM			0.00		
4	Council Approval	KERRY	11-Nov-11	11-Nov-11	0.00	MEDIUM			0.00		
5	Check Measure	BRAD.D	14-Nov-11	14-Nov-11	2.50	MEDIUM			0.00		
6	Order Materials	SCOTT.J	15-Nov-11	15-Nov-11	1.00	MEDIUM			0.00		
7	Arrange Sub Contractors	FRED.S	15-Nov-11	16-Nov-11	1.00	MEDIUM			0.00		
8	Issue Materials to Job	BRAD.D			0.00	MEDIUM			0.00		
9	Manufacture	BRAD.D			0.00	MEDIUM			0.00		
10	Quality Control Check	BRAD.D			0.00	MEDIUM			0.00		
11	Send Invoice to Client	BRAD.D			0.00	MEDIUM			0.00		
12	Arrange Delivery & Installation	BRAD.D			0.00	MEDIUM			0.00		
13	Payment Received ?	BRAD.D			0.00	MEDIUM			0.00		
14	Installation Completed & Checked	BRAD.D			0.00	MEDIUM			0.00		
15	Standard Thank you Letter Sent	BRAD.D			0.00	MEDIUM			0.00		
16	Sales Lead Referral Contact Made	BRAD.D			0.00	MEDIUM			0.00		
17	Council Approval	BRAD.D			0.00	MEDIUM			0.00		
					7.20						

Please Note :

- Once you have “won” the job, the Job Status typically changes to be Work in Progress (or, Won - Awaiting Commencement)
- You can also add details of the Contract Price, Contract reference numbers, the Date Won, and Due Start/Finish dates
- Employee Work Schedules can also be added, by Date/Time
- The standard Job Checklist of Tasks is automatically copied across from the Getting Started area, and is attached to the job.
- At that point, you can amend each Task’s details in terms of – Employee Responsible, Expected Start/Finish Dates, Expected Hours to complete each task, and Priority classification
Any Notes
Actual Date/Finish Dates/Hours are normally added later

Checklist Search Enquiries

InterAcct IA-Demo - [JOB MENU - display]

File Record Edit View Go Advanced Menu Graph Design Help



The screenshot shows the 'JOB MENU' interface of InterAcct IA-Demo. At the top, there is a blue title bar with the text 'InterAcct IA-Demo - [JOB MENU - display]'. Below this is a standard menu bar with options: File, Record, Edit, View, Go, Advanced, Menu, Graph, Design, Help. A toolbar with various icons follows. The main area features five large icons representing different business functions: Clients (two people), Purchasing (a box with a downward arrow), Creditors (two workers), Inventory (a shopping basket), and Debtors (a hand holding money). Below these icons is a 'Menu' section with a list of 66 numbered items. Item 42, 'Task Checklist, by Start Date', is highlighted in blue. At the bottom, there is a navigation bar with buttons for 'Form help', 'Field help', 'Contact-Us', 'Management', 'Payroll', 'Stock', 'Debtors', 'Marketing', 'Sales', and 'Manuals'. A status bar at the very bottom reads 'Welcome to InterAcct Software - Job Menu.'

Menu

1. Enquiries/Jobs Database
2. Clients/Prospects
- Getting Started :
3. Job Types - Q&A Forms
4. Job Categories
5. Cost Groups, Items
6. Machines/Equipment
7. Quick Estimate Types
8. Job Templates, Kits
9. Building Site Tables
10. Estimating Defaults
11. Stock/Purchasing Menu
12. Employees
13. Invoice Standard Message
14. Quote/Invoice Lines
15. Quote Terms & Conditions
16. Quotation Clauses
17. Job Safety Setup
- Job Cost Transactions :
18. WIP Opening Balances, Detailed
19. WIP Opening Balances, Simple
20. Quick Timesheets
21. Timesheets, Date/Employee
22. Timesheets, by Date
23. Stock Reserved for Jobs
24. Stock Issues to Jobs
25. Job Expense Recovery
26. Machine Hire to Jobs
27. Job Kits - Auto Issue
28. Subbie's Works Orders
29. Claims from Subbies
30. Job Invoicing
31. Auto Draft Invoicing
32. Invoices, Check Costings
33. Automatic Job Invoicing
34. Job Credit Notes
- Job Schedules :
35. Jobs by Won Date
36. Jobs by Start Date
37. Jobs by Type, Start Date
38. Jobs by Due Completion Date
39. Jobs by Branch
40. Jobs by Region, Post Code
41. Jobs by Sub Contractor
42. Task Checklist, by Start Date
43. Task Checklist, by Finish Date
44. Task Checklist, by Employee
- Job Enquiries :
45. Job Tracking by Dates
46. Job Cost Analysis
47. Work in Progress
48. Weekly Timesheet Summary
49. Employee Performance
50. Job Origin Analysis
51. Revenue Writeoff Analysis
52. Jobs Quotations
53. Lost Business Analysis
54. Job Type Profit Analysis
55. OH&S Risk Assessments
56. Delete Unwanted Estimates
57. Progress Claims
58. Job Site Survey
59. Tools Database
60. Document Register
61. Drawings Database
62. Job Site Properties
63. Jobs Open Schedule
64. Jobs Closed
65. Job Reports Menu
66. Exit InterAcct

Form help Field help Contact-Us Management Payroll Stock Debtors Marketing Sales Manuals

Welcome to InterAcct Software - Job Menu.

Please Note :

- Task Checklists are available by Employee, Expected Start and Finish Dates

Checklist - Search

The screenshot shows the InterAcct IA-Demo software interface. The title bar reads "InterAcct IA-Demo - [TASK CHECKLIST BY START DATE - search]". The menu bar includes "File", "Record", "Edit", "View", "Go", "Advanced", "Menu", "Graph", "Design", and "Help". The toolbar contains various icons for navigation and actions. The main window features a search form with a "Search for ..." header and a list of search criteria: Exp Start, Employee, Job No, Task Description, Exp Finish, Exp Hrs #, Priority, Heading, Act Start, Act Finish, Act Hrs #, Completed By, and Notes. Each criterion has a corresponding input field with a search icon. To the right of the search form are two buttons: "Power Search" and "Start Search". A pop-up window titled "Employee - EMPLOYEES" is open, showing a list of employees with columns for "Employee Name" and "Title".

	*Employee Name	Title
1	Alan Stevens	Storeman
2	Brad Deniston	Project Manager
3	Chris Gentals	Technical Support
4	Craig Stevens	Factory Foreman
5	Fred Simpkins	Foreman
6	Jim Reynolds	Apprentice
7	John Hua	Clerical
8	John Sanderson	Tradesperson
9	Kerry Marsh	Commercial Manager
10	Mark Wetherspoon	Salesperson
11	Mike Way	Managing Director
12	Not Assigned	
13	Nasser Maleklou	Manager, Engineering Serv
14	Peter Johns	Factory Worker
15	Rex Harrison	Foreman
16	Scott Johnson	Operations Director
17	Tim Way	General Manager
18	Trevor Lloyd	Accountant

Please Note :

- Each of the Checklist enquiry files has the Search facility.
- You can enter any combination of search values
- There is also the option of the "Power" search (range of values, etc.)
- Please refer to the Search Video on the InterAcct web site

Task Edit

InterAcct IA-Demo - [EMPLOYEE TASK CHECKLIST - display]

File Record Edit View Go Advanced Menu Graph Design Help

Task Description: Home Warranty Insurance Line No: 10
Job No: 100004 Heading: JOB Priority: MEDIUM
Employee: BRAD.D Completed By: JIM.R
Exp Start: Fri 4-Nov-2011 Act Start: Sat 5-Nov-2011
Exp Finish: Sat 5-Nov-2011 Act Finish: Sun 6-Nov-2011
Exp Hrs #: 2.20 Act Hrs #: 1.50
Notes: \$10m Cover
Job/Project Name: Boardroom Furniture, Office Desks, Reception Area
Job Description: A Complete Design, Construct and Fit Project
Client Name: Business Resources Pty Ltd, Peter Johnso

Menu
1. Task Comments
2. View : Job Details
3. View : Client File

Form help Field help

You can add new tasks to this listing.
However, when you first "Open" a Job, it will automatically copy a list of standard Tasks (set up under the Getting Started Menu), into your job.
All you then need to do, is add/change the Employee responsible for doing the task, and input the Expected Start/Finish Dates for each Task.
At that point, the Task line item will copy across to this file - so you can then add/change the Actual Start/Finish Dates, and who actually completed each Task. As a result, the job is updated, plus the Customer's Contact History is updated as well.

Please Note :

- You can add the Actual Start/Finish Dates, and Hours to any of the Checklist Schedules
- This information can be added to a list (like a spreadsheet), or by calling up to view an individual Task Item. There is a menu link to a Notes file.