



Questions & Answers

During the Pre & Post stages of winning a new Job/Project, there is often a lot of information that needs to be collected against a job (or a Product, Supplier, Sales Order, Client).

Information (Questions & Answers) like –

- a customer's specifications,
- site details,
- measurements,
- financial details,

and after the sale more questions & answers may be needed in regard to -

- the Contract,
- Construction,
- Installation, etc.

InterAcct refers to these sets of questions & answers as "Forms", and the form can be linked to a Job Type, and Industry Classification (or any other basis). In other words, the questions & answers may be specific only to one type of –

- work you do,
- customer industry group
- building construction
- job site location, etc

In turn, each Form can be linked to any number of Question & Answer (Q&A) "Items". In fact, each Q&A item can be made up of 4 different questions and answers. You can define the format type for each one of the four questions for a Q&A Item as being –

- Date
- A defined set of Allowed Values
- Numeric
- Text – alphanumeric
- Yes/No ?
- Or, Not Required

InterAcct Master - [INTERACCT MAIN MENU - display]

File Record Edit View Go Advanced Menu Graph Design Help

Licenced Owner * INTERACCT SOFTWARE * LICENCE# T1000

Date Thu 10-Feb-2011
Time 12:25:46

Company Names Phone Numbers Work Schedules Reminders Manuals System Design

Surnames Email Addresses Task Schedules Diary Alerts Videos

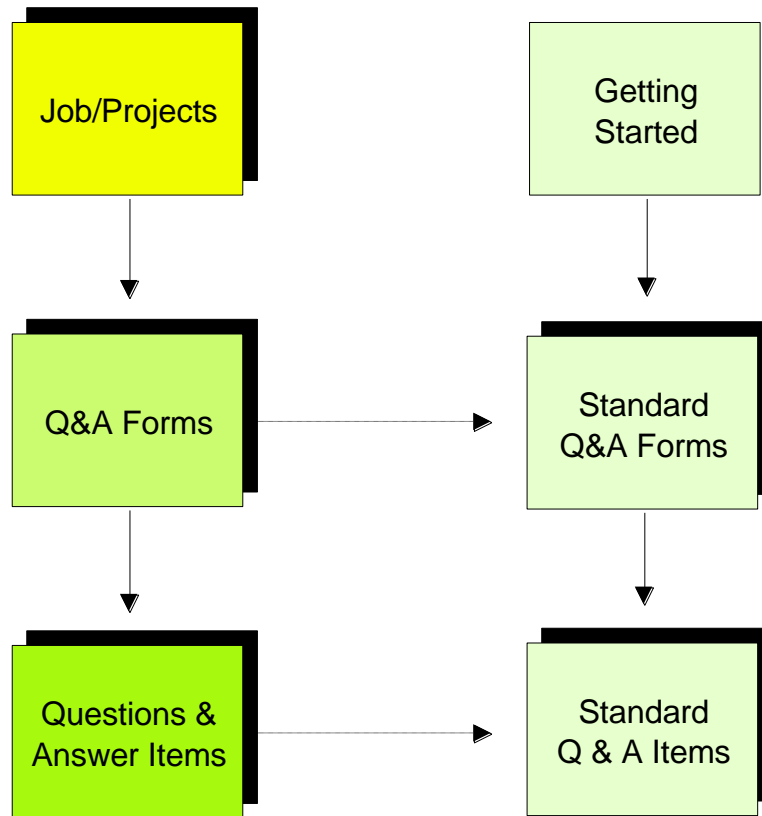
First Names By Post Code Quote Register Document Register Exit InterAcct

Menu

1. Getting Started Menu
2. Business Names
3. Enquiries/Jobs
4. A/cs Payable
5. A/cs Receivable
6. Accounting
7. General Ledger
8. Payroll
9. Stock/Materials
10. Jobs Menu
11. Service/Maintenance
12. Kit Conversion Menu
13. Management

Form help Field help Reports Contact-Us Suburbs Training Quick-Start Getting Started

Welcome to the InterAcct Software - Main Menu



Step 1 : Job Menu – Getting Started – Job Types

Step 2 : For each Type of Job, create one or more Q&A “Forms”

Please Note : a “Form” is just the heading for a group of Q&A Items to be attached to

Step 3 : For each Q&A Form, attach any number of Q&A “Items”

Please Note : for each Q&A Item you can have up to four (4) Questions & Answers

Step 4 : Search/Select a Job/Project.

Step 5 : Attach one or more Q&A “Forms” to it.

Please Note : All the standard Q&A Items will then be automatically copied across

Step 6 : Input your answers to each of the questions (related to this job)

Step 2 : Q&A Forms – Q&A Items

InterAcct_JDC - [QUESTION/ANSWER FORMS - display]

File Record Edit View Go Advanced Menu Graph Design Help

Question Form ID1: FLOORING
 Question Form ID2: COMMERCIAL
 Question Form: PRE-SALE
 Form Description: Pre Sale Questions

QUESTION/ANSWER FORMS ITEMS list

Sort No	Question 1	Answer 1	Question 2	Answer 2	Question 3	Answer 3	Question 4	Answer 4
1	Status of Contract ?	Contract Submitted	Value of Contract \$	0	Likely Approval Date ?	//	Our Next Action to Complete the	

Step 3 : Q&A Items

InterAcct_JDC - [QUESTION/ANSWER FORMS ITEMS - display]

File Record Edit View Go Advanced Menu Graph Design Help

Question Form ID1: FLOORING
 Question Form ID2: COMMERCIAL
 Question Type: PRE-SALE
 Sort No: 20
 Last Job Number: 100004

Form Heading: Pre Sale Questions

Question 1: Status of Contract ?
 Answer 1: 1.SUBMITTED
 Description 1: Contract Submitted for Signing
 Answer Type 1: L (Lookup Value)
 Lookup Id: ORD-STATUS

Question 2: Value of Contract \$
 Answer 2: 0.00
 Answer Type 2: N (Numeric Value)

Question 3: Likely Approval Date ?
 Answer 3: [Date Field]
 Answer Type 3: D (Date Value)

Question 4: Our Next Action to Complete the Contract
 Answer 4: [Text Field]
 Answer Type 4: T (Text Value)

Answer Type 3 - ALLOWED VALUES

Value	Description
D	Date Value
L	Allowed Values
N	Numeric Value
T	Text Value
Y	Yes/No Answer
Z	Not Required

Form help | Field help | Lookups

Please select the Type of Answer you are expecting for the Third Question for this Series.

Either a:
 T - Text Answer (up to 80 Characters long)
 N - Numeric Answer (15 Characters - 2 Decimal Places)
 D - Date Field (8 Digit Date)
 L - Lookup Value, and select a related look list of Options.
 Y - For a Yes/No Question... Uses the Text Field.
 Z - NOT REQUIRED... If you don't want to ask another Question.

Step 4 : Select Job – attach Q&A Form(s)

The screenshot shows the InterAcct JDC software interface. The main window displays a 'Menu' with various options categorized into ESTIMATE/QUOTE/BUDGET, OPEN JOB - CONTRACT, INVOICING, COST TRANSACTIONS, and PROCESSES. A secondary window titled 'QUESTION/ANSWER FORMS list' is open, showing a table with the following data:

Number	Question Form	*Form Description
1	100004 PRE-SALE	Pre Sale Questions

Below the menu, there are buttons for 'Form help', 'Field help', 'Job-Type', 'Contract-Admin', 'Charge-Rates', 'Tools', 'Accounting', and 'Getting'. A note at the bottom states: 'This menu attempts to give you direct access to all the files in relation to a single job.'

Step 5 : Input Answers to Q&A Items

The screenshot shows the InterAcct JDC software interface displaying the 'QUESTION/ANSWER FORMS ITEMS list' window. The window shows the following details:

- Job Number: 100004
- Question Form ID1: FLOORING
- Question Form ID2: COMMERCIAL
- Question Form: PRE-SALE
- *Form Description: Pre Sale Questions

The main table in the window is as follows:

Question 1	Answer 1	Question 2	Answer 2	Question 3	Answer 3	Question 4	Answer 4
1	Status of Contract ?	Contract Submitted for Signing	Value of Contract \$	50000	Likely Approval Date ?	15/02/2011	Our Next Action to Comp

Four black arrows point to the empty 'Answer 1', 'Answer 2', 'Answer 3', and 'Answer 4' columns, indicating where to input answers.

