InterAcct for Jobs Processes

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Why InterAcct?

☑ **Job Register** A central register of all job enquiries and past & present jobs projects

☑ **Estimating** Several estimating methods - detailed, summarized, or repair work

☑ **Quoting** Many different quotation print layout options available

☑ **Job Accounting** Fully integrated with a full accounting and financial reporting system

☑ **Job Processes** Daily routines and processes in relation to jobs that aim to make day to day work easier. In addition, enabling the user to have necessary business controls

InterAcct

The Perfect Fit

Your Company
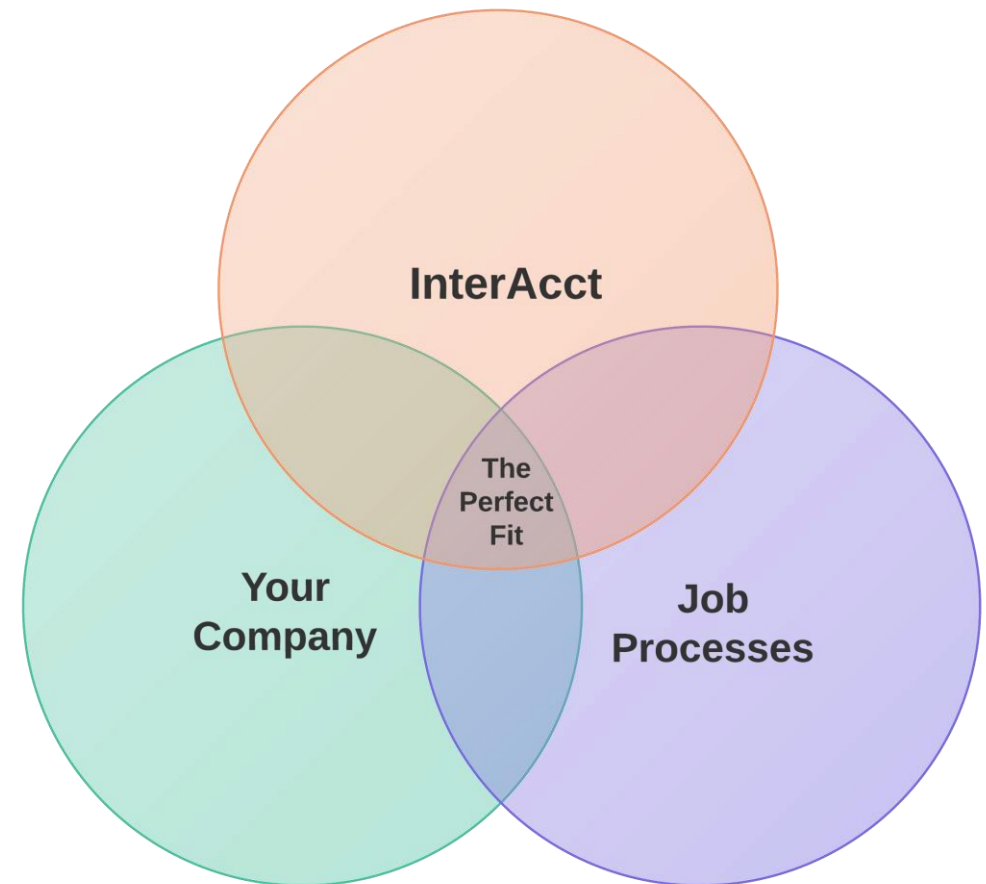
Job Processes

Job Transactions & Processes Menu

A Once you have won a job, in addition to Accounting Transactions there are 'Job Processes'

B This might include Variations to Contract with the Client, and/or Sub Contractors

C Menus that don't relate to your business will be removed for simplicity.

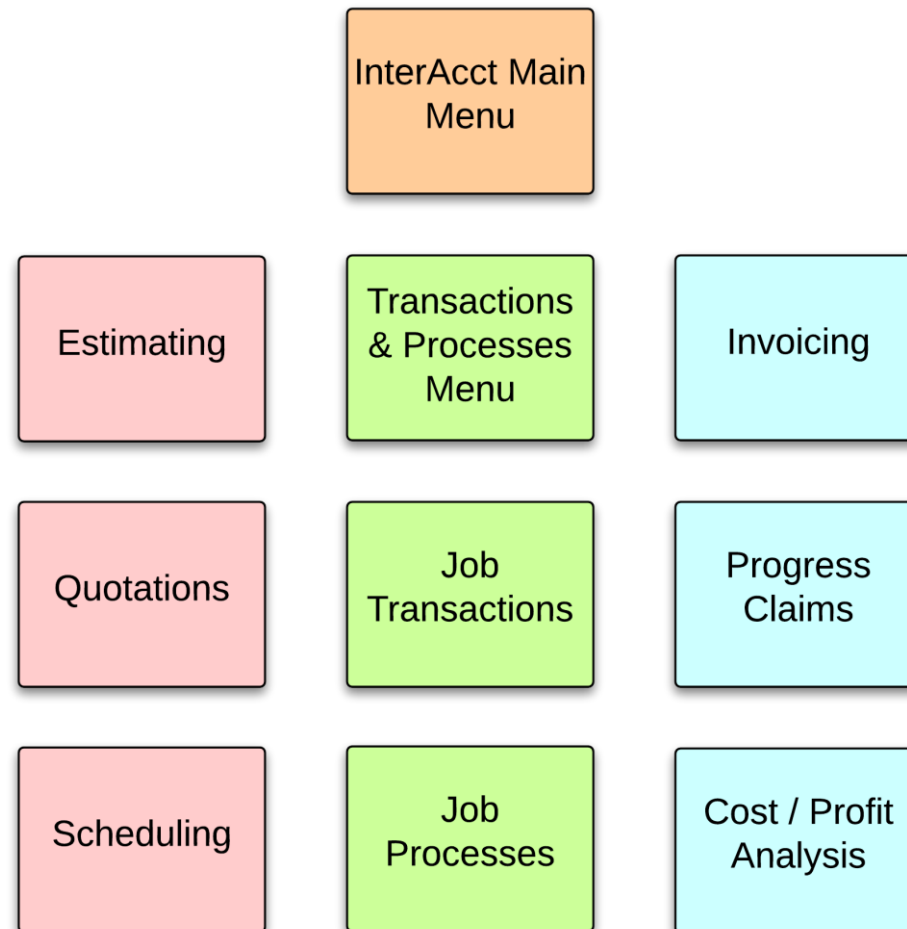**D** Reports can also be personalised to suit

Structure of subject (flowchart)

'InterAcct - an integrated database of information about jobs/projects'

Other than entering job cost transactions against a job, there may also be a number of 'Job Processes' that need to be recorded against the job.

	InterAcct Main Menu	
Estimating	Transactions & Processes Menu	Invoicing
Quotations	Job Transactions	Progress Claims
Scheduling	Job Processes	Cost / Profit Analysis

Key Features & Advantages

	Feature	Advantage	Base?
Contract Variations	Where there is a fixed contract price, often later variations to the contract are made	This can be where your job's profit is won, or lost. Variations can be approved, or not approved - in order to re-calculate the forecasted cost & profit	Option
Personalised Letters	A simple letter writing feature to send standard form letters to a selected party	Quick and simple - few keystrokes required to create a personalised letter	Option
Extension of Time	A variation on the standard personalised letter	Combines aspects of contract variations and a personalised letter	Option
Alert System	Record events (or future events) that are of concern	A formalised to alert the Management Team	Option
Employee Tasks	Create a list of tasks - assign to employees	When should these tasks have been completed? Overdues? Things taking too long to complete?	Option
Document Register	Attach photos, documents, drawings to a job	Link to view document	Option
Questions & Answers	Create your own forms to collect information	Lists of questions by Job Type, and/or Job Stage	Option
Tools Database	Create a Lending Library of your tools and equipment	Who hasn't returned tools lent out to a job?	Option
Query Database	Questions asked by third parties	Record what answers were given - send a written confirmation to all interested parties	Option
Other Parties	A list of the third parties involved on a job	Maintains a database of a party's prior job involvements	Option

Screen 1: Contract Variations

Variations to Contract :
If you originally win a contract based on a 'fixed' price, there may well be opportunities during the work to identify variations to contract:

- ✓ Material price rise/fall
- ✓ Changed work scope
- ✓ Specifications changed

Variations may be identified that are approved by the client, or not approved.

Either way, the Contract price can change as could the forecast cost/profit.

Screen 2: Personalised Letters

Letter Writer:
There are a couple of ways to utilise the information stored within the InterAcct database in order to create a personalised letter to a party.

In this example, the letter(s) can relate to a job where you want to retain a history of who/when letters have been sent.

- ✓ Letter Writer (see screen) allows a simple interface of a contact's details with a standard form letter
- ✓ Interface the data from within InterAcct to merge automatically with MS-Word where you may need to personalize a standard form letter each time.

Screen 3: Extension of Time - Letter

Quick Letter Production :
In this example, it shows another way to create (very quickly) a personalised letter where there needs to be a request for an extension of time

Virtually every aspect of this letter can be personalised by the User to suit.

- ✓ Letter (text) date
- ✓ The company and contact name details
- ✓ The Greeting - "Dear"
- ✓ Headings
- ✓ Letter text

File   Edit   Zoom   Tools   Help

Selected Printer : Xerox ColorQube 8570DN   Selected Tray : Auto

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InterAcct
SOFTWARE PTY LTD

24th March, 2015

Mr Kenneth Carruthers	Your Ref : 5656
General Manager	Our Ref : EOT-01
Corporate Enterprises Pty Ltd	Job Number : 100021
100 Sydney Road	
The "Cleveland" Building	
LINDFIELD NSW 2070	

Dear Ken,

Re : Time Extension Due to :   31st March, 2015
Re : Period of Time Claimed :   10 working days
Re : Revised Completion Date :   30th June, 2015

Due to the weather conditions of the last few weeks, the work has been delayed some two weeks.

On that basis, we seek your approval to extend the contract period by that same period.

Variations to Contract : 100003

Variation In the Contract
Extension of Time
Please sign & return this Variation to Contract.

Screen 4: Alert System

Management Alert:

Often when completing a job, events happen (or are about to happen) that need to be recorded against the job and then various people in the Management Team need to be alerted.

Verbal messages can be often forgotten or misunderstood.

That way, corrective action can be taken.

InterAcct Demo - [ALERT SYSTEM - display , Design, Make, and Assemble A Backyard Cabin, 20 M2, PROJ]

File Record Edit View Go Advanced Menu Graph Design Help

Date	Tue 24-Mar-2015
Time	51742
Attn to	LARRY.M
Input by	FRED.P
Alert Message	Possible Rock to Be Excavated
Memo Attached ?	Y
Customer	Diverse Builders Pty Ltd

MESSAGE NOTES

Larry,

Please be aware that we have encountered quite a bit of rock during the excavation for the footings to the building. At this stage they are not much of a problem, but you may wish to altert the client of possible future variation(s) if the rock is more extensive.

Screen 5: Employee Task Checklist

Task Checklist:
Getting organised is often the key to a job being profitable.

The simple steps to follow are:

- ✓ Make a list of the things that need to be done - before, during, and after doing a job
- ✓ Assign an employee as being responsible for completing each task
- ✓ When should the task be started and completed?
- ✓ How long should the task take to complete?
- ✓ And later, input the actual dates and times to compare.

There is also a central database of all tasks by employee (for search).

Screen 6: Job Document Register

Job Document Register:
Each job can be linked to any stored document held on your computer network.

Documents might be -

- ✓ PDF files
- ✓ MS-Word documents
- ✓ Drawings
- ✓ Photos (eg. jpg files)

Each document can be labelled in terms of subject matter, author, filing location, etc.

A centralised database is also updated of all documents, plus they can be linked to the related client file.

InterAcct Demo - [DOCUMENTS DATABASE - display , Design, Make, and Assemble A Backyard Cabin, 20 M2, PROJ]

File   Record   Edit   View   Go   Advanced   Menu   Graph   Design   Help

Document Header   Show Image

Document ID   PHOTOT-KIT   Version No   100001   Job No   100021
                                                IN

Attach or Scan?   ATTACH 🔍 Attach Existing Document
Document   Images\100011\kitchen.png   🔍

Description

Subject Matter/Title   Photo of Kitchen
Doc Date   Wed 25-Mar-2015 🔍   Location
Author   Clive Rainbow   Product Id
                                                         Supplier Id
Doc Reference   Updated By   CVR

Business Name   Diverse Builders Pty Ltd, Jaime Nielsen

Comments

Menu
1. Document Text
2. View : Contacts Database
3. View : Job Details
4. View : Employee
5. Distributed to

Manual

Form help   Field help

This is the central document register.

You can input new records here - details of MS-Word documents, pdf files, photo images, drawings, etc.

However, the 'normal' place to input your documents is under a Job, Client, or Employee record.

Screen 7: Questions & Answers

Questions & Answers:

During the process of quoting, winning a job, preparing to start work on a job, and then (maybe) the installation process - there are often pieces of information that need to be collected and recorded.

Questions asked, and answers given.

For each type of job a standard set of questions (like a printed form) can be created and attached to the job. This may also be for each stage of the job.

Each 'set' of questions/answers could be a combination of:
- ✓ Text
- ✓ Dates
- ✓ Numbers
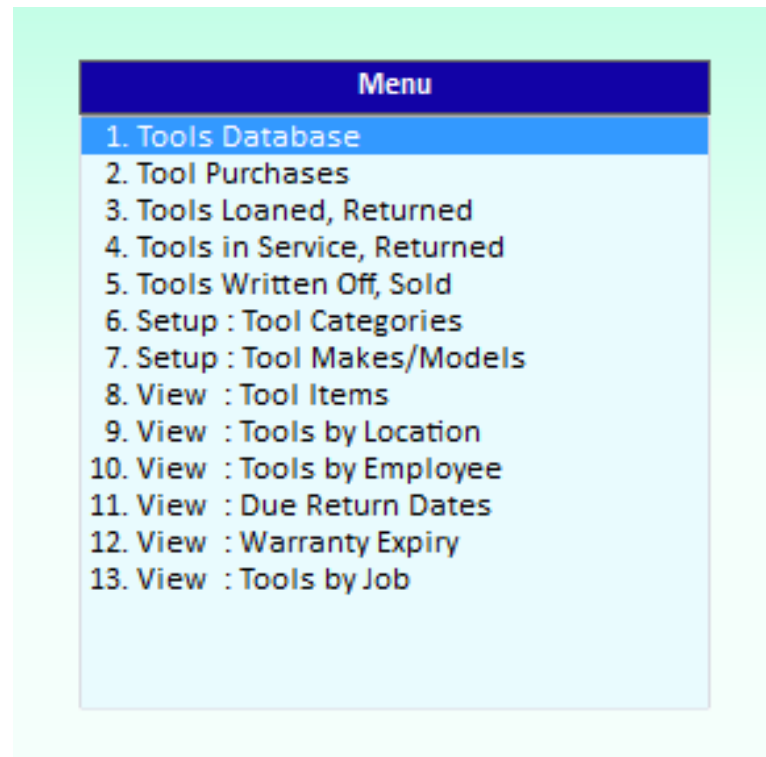- ✓ Allowed values
- ✓ Yes/No answers

Screen 8: Tools Database

Tools Database:

A standard feature of InterAcct is to create a database of your tools - plant & equipment (typically) used in conjunction with a job.

The idea then being that the business can have a type of Lending Library to book out tools to a person and or a job.

This may then help to make people responsible for returning the tools after they are no longer needed on a job.

Menu
1. Tools Database
2. Tool Purchases
3. Tools Loaned, Returned
4. Tools in Service, Returned
5. Tools Written Off, Sold
6. Setup : Tool Categories
7. Setup : Tool Makes/Models
8. View : Tool Items
9. View : Tools by Location
10. View : Tools by Employee
11. View : Due Return Dates
12. View : Warranty Expiry
13. View : Tools by Job

Screen 9: Queries Database

Queries Database:

There are often questions asked by third parties in relation to a job.

They might be (verbal) questions from:
- ✓ Architects
- ✓ Engineers
- ✓ Quantity Surveyors
- ✓ Or the Client

It is so tempting just to give an answer (verbally) to these questions.

Later, you wish that you put those answers in writing, so that there is no confusion or arguments which arise.

Screen 10: Other Parties Involved

Other Parties Involved:

It is quite common that there are other parties involved in completing a job (other than the businesses and the client).

This feature allows a record to be created of who those parties are, and their role in the job.

This then updates that party's database in order to give you an historical record of their involvements with your jobs.

Maybe here is a relationship between a particular party and your job losses?

InterAcct Pricing (Per User)

Users	Base InterAcct	Job Costing, Estimating, Quoting (A)	Costing by Phase (B)	Building Repairs, Insurance Claims (C)
1	$1,650 (15-25)	+ $550 (10)	+ $385 (5)	+ $275 (2-3)
2-3	$1,100 (20-30)	+ $550 (10)	+ $385 (5)	+ $275 (2-3)
4	$825 (20-30)	+ $413 (10)	+ $275 (5-8)	+ $207 (2-3)
5-9	$660 (25-35)	+ $330 (10-15)	+ $220 (5-8)	+ $165 (3-5)
10-19	$550 (30-40)	+ $303 (10-15)	+ $193 (5-8)	+ $138 (3-5)
20-49	$440 (40-60)	+ $275 (10-15)	+ $165 (10-15)	+ $110 (3-5)
50+	$385 (50-75)	+ $253 (15-25)	+ $143 (10-20)	+ $99 (5-10)

Software Pricing

Software Pricing is per Computer Network "User" as defined in the above table. The optional software modules (e.g. Job Cost Estimating) require the Base InterAcct as well, and are purchased based on the number of base Network Users. Prices are all ex GST.

+ Annual Support Pricing

Yearly support is calculated at 20% of purchase price, with no CPI annual increases. Support is reduced by 30% after 3 years. For example a single User (with just the base InterAcct) would be ($1,650 x 20%) = $330

+ Implementation & Training Budget

The (Number) denotes the estimated min/max hours of Implementation & Training required in the budget per installation / module (not per User). Implementation / training "Advanced" is currently charged at the average rate of $180 per hour.

Modules

There is a wide variety of software modules available for purchase, talk to InterAcct staff about your specific software needs.

Request a Cost Estimate:

InterAcct Software Pty Ltd

Toll Free: 1300 66 26 26
Email: sales@interacct.com.au   **Web:** http://www.interacct.com.au