

# InterAcct for Jobs Processes

**InterAcct Software Pty Ltd**

ABN 47 003 411 658

B1a 15 Narabang Way

Belrose NSW 2085

Ph: 1300 66 26 26

[support@interacct.com.au](mailto:support@interacct.com.au)



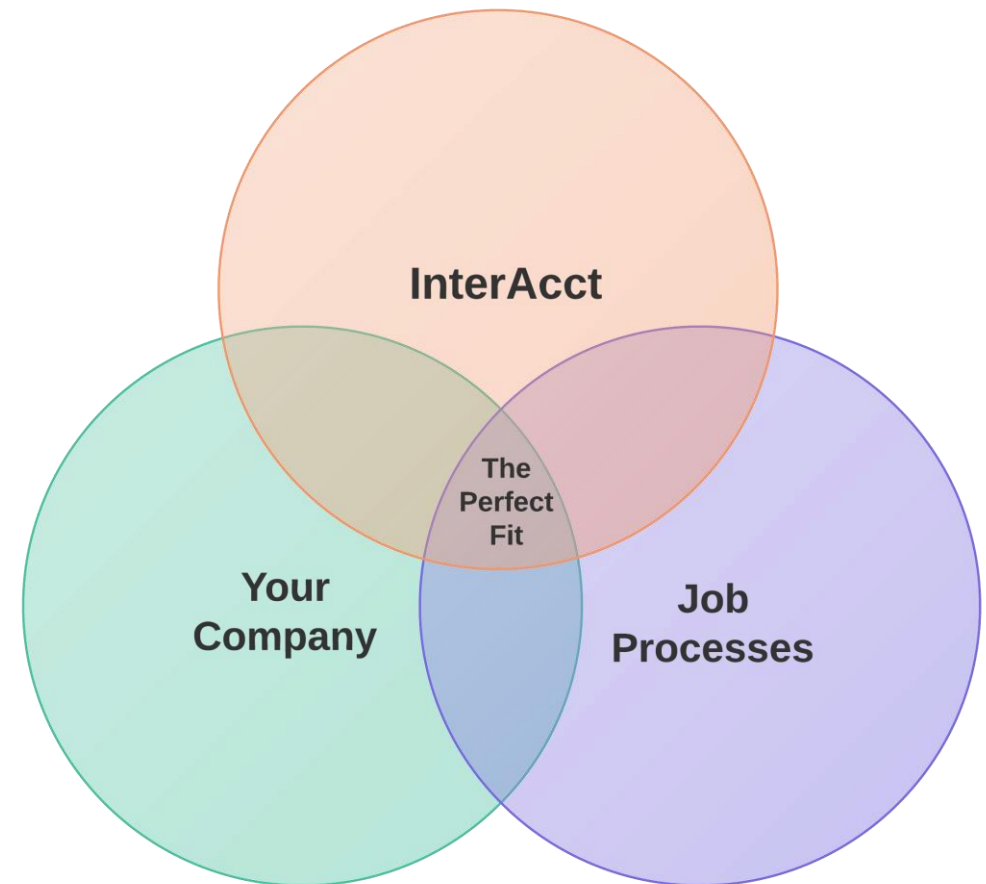
**InterAcct**  
SOFTWARE PTY LTD



# InterAcct for Job Processes

## *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





# 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

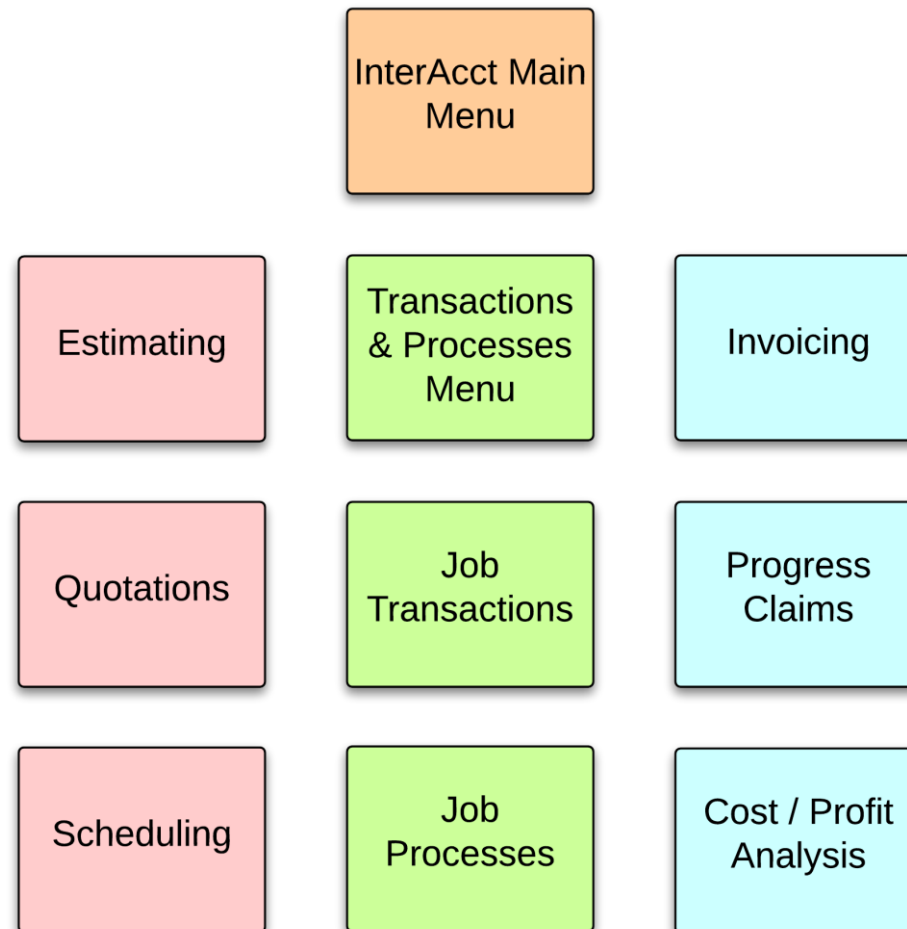




# Structure of subject (flowchart)

*'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.





# Key Features & Advantages

	<b>Feature</b>	<b>Advantage</b>	<b>Base?</b>
<b>Contract Variations</b>	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
<b>Personalised Letters</b>	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
<b>Extension of Time</b>	A variation on the standard personalised letter	Combines aspects of contract variations and a personalised letter	Option
<b>Alert System</b>	Record events (or future events) that are of concern	A formalised to alert the Management Team	Option
<b>Employee Tasks</b>	Create a list of tasks - assign to employees	When should these tasks have been completed? Overdues? Things taking too long to complete?	Option
<b>Document Register</b>	Attach photos, documents, drawings to a job	Link to view document	Option
<b>Questions &amp; Answers</b>	Create your own forms to collect information	Lists of questions by Job Type, and/or Job Stage	Option
<b>Tools Database</b>	Create a Lending Library of your tools and equipment	Who hasn't returned tools lent out to a job?	Option
<b>Query Database</b>	Questions asked by third parties	Record what answers were given - send a written confirmation to all interested parties	Option
<b>Other Parties</b>	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.

File Edit Zoom Tools Help

Selected Printer : Xerox ColorQube 8570DN Selected Tray : Automatically Select


 InterAcct Software Pty Ltd  
 PO Box 786  
 Manly NSW 1655  
 Ph : 9975 4653 Fax : 9975 72693  
 www.interacct.com.au  
 ABN : 47 003 411 658

**Variation to Contract - Approved**

Date : 24/03/2015  
 Job Number : 100021  
 Your Contact : Jaime Nielsen  
 Variation : 100002  
 Ref. Number : 4545F

Diverse Builders Pty Ltd  
 PO Box 196  
 NUMURKAH VIC 3636

Job Name : Design, Make, and Assemble A Backyard Cabin, 20 M2  
 Variation Type : Rise & Fall of Prices Agreement  
 Description : Timber price changes  
 Instructions : Please sign & return this Variation to Contract.

Comments :

Variation : 100002

Description	Qty	Units	Price \$	Total \$
<b>Timber Prices Changes</b>	1.00	per VARIATION	2,500.00	2,500.00
Timber price increase for all dressed treated pine 3% as from 1st March, 2015				

Contract Value	\$ 15,000.00	Variation Value (Ex GST)	\$ 2,500.00
Previous variations	\$ 0.00	GST Component	\$ 250.00
Adjusted contract	\$ 15,000.00	<b>Total Variation Value \$</b>	<b>2,750.00</b>
This Variation	\$ 2,500.00		
Revised Contract	\$ 17,500.00		



## 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.

InterAcct Demo - [LETTER/LABEL PRINT SETUP - display, Design, Make, and Assemble A Backyard Cabin, 20 M2, PROJ]

File Record Edit View Go Advanced Menu Graph Design Help

One or Many ? ONE Top of Form 0 Client ID DIVBUINU  
 Output to LPT1 Sender LARRY.M Contact 1 Jaime Nielsen  
 Letter/Label LETTER Letter Code FLYER I recently sent you an email

Letter Date Text 24th March, 2015

Jaime Nielsen  
 Manager  
 Diverse Builders Pty Ltd  
 PO Box 196

NUMURKAH VIC 3636

Greeting Dear Jaime

Yours Larry Mellowes  
 Managing Director

Comments

Menu

1. Print : Letters/Labels
2. View : Letter Text
3. View : Owner's Details
4. View : Printer Details
5. View : Client File
6. View : Contact Name
7. Help : Letter Setup
8. Help on Fonts

Form help Field help Fonts Employee

This is the file that holds all the information about the last/next standard letter sent.

It is typically updated automatically from the either the Contact Name (Letters Sent), or the Job Reminders Letters.

Letters

Manual

Video





## 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

The screenshot shows a software application window with a menu bar (File, Edit, Zoom, Tools, Help) and a toolbar. The main content area displays a letter template for InterAcct Software Pty Ltd. The letter is dated 24th March, 2015, and is addressed to Mr Kenneth Carruthers, General Manager of Corporate Enterprises Pty Ltd. The letter discusses a time extension request due to weather conditions and seeks approval to extend the contract period. It includes a table of reference information and a section for variations to the contract.

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**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

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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 alert 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).

The screenshot shows the InterAcct software interface. The top window displays a menu with various options, and '48. Task Checklist' is highlighted. The bottom window shows a table titled 'EMPLOYEE TASK CHECKLIST list, Design, Make, and Assemble A Backyard Cabin, 20 M2, PROJ'.

	Employee	Status	Task/Activity	Exp Start	Exp Finish	Exp Hrs #	Priority	Act Start	Act Finish	Act Hrs #	Completed By
1	GERRY.S	COMPLETE	Home Warranty Insurance	25-Mar-15	25-Mar-15	0.25	MEDIUM	25-Mar-15	25-Mar-15	0.30	GERRY.S
2	DARREN.P	COMPLETE	Completed Job Checklist	25-Mar-15	25-Mar-15	1.00	MEDIUM	25-Mar-15	25-Mar-15	0.80	DARREN.P
3	FRED.P	WIP	Plans to Council	26-Mar-15	28-Mar-15	1.50	MEDIUM			0.00	
4			Council Approval			0.00	MEDIUM			0.00	
5			Check Measure			0.00	MEDIUM			0.00	
6			Order Materials			0.00	MEDIUM			0.00	
7			Arrange Sub Contractors			0.00	MEDIUM			0.00	
8			Issue Materials to Job			0.00	MEDIUM			0.00	
9			Manufacture			0.00	MEDIUM			0.00	
10			Quality Control Check			0.00	MEDIUM			0.00	
11			Send Invoice to Client			0.00	MEDIUM			0.00	
12			Arrange Delivery & Installation			0.00	MEDIUM			0.00	
13			Payment Received ?			0.00	MEDIUM			0.00	
14			Installation Completed & Checked			0.00	MEDIUM			0.00	
15			Standard Thank you Letter Sent			0.00	MEDIUM			0.00	
16			Sales Lead Referral Contact Made			0.00	MEDIUM			0.00	
						2.75				1.10	



# 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


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.

Menu

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

Manual





# 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

InterAcct Demo - [QUESTION/ANSWER FORMS ITEMS - display , Design, Make, and Assemble A Backyard Cabin, 20 M2, PROJ, ]

File Record Edit View Go Advanced Menu Graph Design Help

Form Description  
Employee: JOHN.H Starting Date: 0 Days from Start Job Type: PROJECT ACCEPTANCE FORM1 Question Order: 20

Questions Heading: Signing :

Question 1: Date Signed : Answer 1: Tue 24-Mar-2015 Answer Type 1: D Format: 0

Question 2: Contract Amount \$ Answer 2: 15000.00 Answer Type 2: N Format: 0

Question 3: Client Contact : Answer 3: George Stephens Answer Type 3: T Format: 0

Question 4: Contract Type Answer 4: Lookup Code: CON-TYPE Answer Type 4: L Format: 0

Lookup Values

Menu

- Add next Question
- Tradesperson Relationships
- Question 1 Comments
- Question 2 Comments
- Question 3 Comments
- Question 4 Comments

Answer 4 - QUESTION/ANSWER FORMS LOOKUPS

	Value	Description
1	DO-CHARGE	Do & Charge
2	FIXED	Fixed Price
3	UPPER-LIMIT	Upper Limit - Do & Charge



# Screen 8: Tools Database

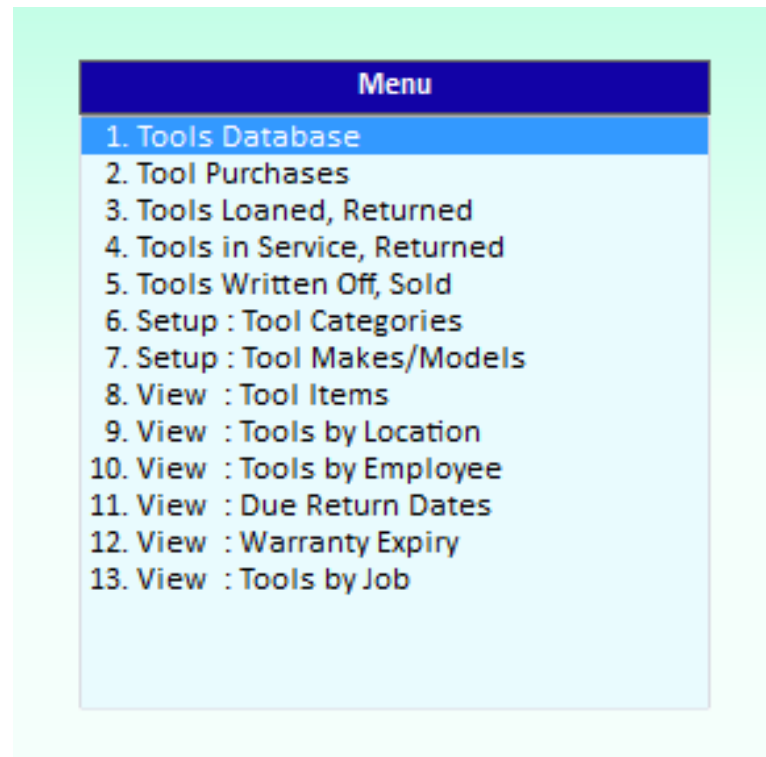
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## Tools Database:

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.





# 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.

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

File Record Edit View Go Advanced Menu Graph Design Help

Job No 100021 Sheet No 700001 Date Tue 24-Mar-2015

\*Query Sheet Heading Depth of Concrete Path ?

Job Name Design, Make, and Assemble A Backyard Cabin, 20 M2

Prepared by LARRY.M

Name Larry Mellowes

Title Managing Director

Follow Up Wed 25-Mar-2015

Comments Requested by Engineer

Menu

1. Query Sheet Items
2. Distribute Sheet to...
3. Query Notes File
4. Print : Query Sheet

QUERY SHEET ITEMS list , Design, Make, and Assemble A Backyard Cabin, 2...

File Record Edit View Go Advanced Graph New Design Help

	Ref	Query	Answer
1	Q1	What is the Depth of the Main Concrete Pathway ?	200 Mm



# 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?

The screenshot shows the InterAcct software interface. At the top, there is a menu bar with options: File, Record, Edit, View, Go, Advanced, Menu, Graph, Design, Help. Below the menu bar is a toolbar with various icons. A secondary toolbar contains icons for Scheduling, Purchasing, Materials, Site History, Enquiries, Service, Client, and Manufacture. The main menu is displayed, listing various options under categories like ESTIMATE/QUOTE/BUDGET, COST TRANSACTIONS, MANUFACTURING, OPEN JOB - CONTRACT, PROCESSES, and REPORTS. The option '54. Other Parties Involved' is highlighted. Below the menu, a window titled 'OTHER PARTIES INVOLVED list, Design, Make, and Assemble A Backyard Cabin, 20 M2, PROJ' is open, showing a table with the following data:

	Other Party Involved	Role	Mobile	Last Date	Follow Up	OH&S Rec'd ?	Comments
1	D.H.B. & Associates Pty Limi	ENGINEERS		25-Mar-15			Discuss Limitations
2	Diverse Builders Pty Ltd, Jai	TENDERER		25-Mar-15			
3	Illumination Technology Ltc	ELECTRIC		25-Mar-15			





# 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  $(\$1,650 \times 20\%) = \$330$

## + 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](mailto:sales@interacct.com.au)

**Web:** <http://www.interacct.com.au>