

InterAcct Standalone Job Quotes

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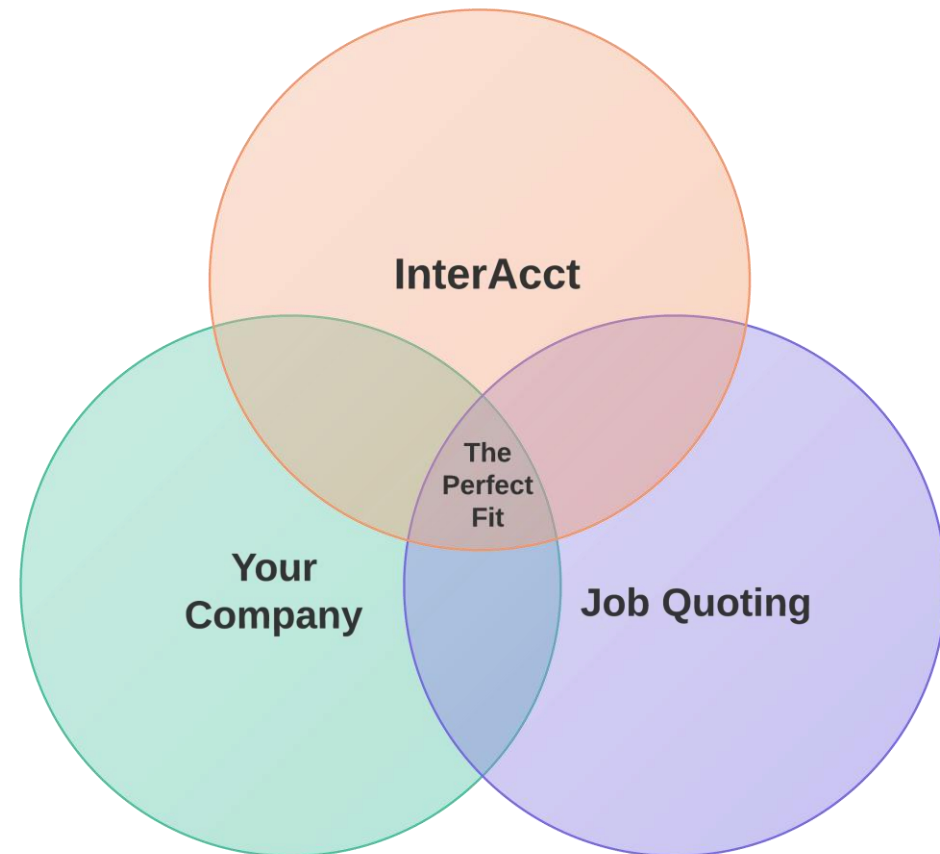
InterAcct
SOFTWARE PTY LTD



InterAcct Standalone Job Quotes

Why InterAcct?

- ✓ **Integration** InterAcct was one of the first systems available that offered a corporate database of information from Sales & Marketing through to Financial Reporting
- ✓ **Quoting** Preparing professional looking customer quotations (after doing a Cost Estimate) is an essential part of gaining new business
- ✓ **Many Options** As is typical with InterAcct, there are numerous options available (levels of detail) to prepare a quotation
- ✓ **Jobs or Products** Whereas this note looks at Job related quotations, there are separate systems that cover quotes and relation to Products & Services (prior to Sales Order Entry)
- ✓ **Personalised** The print (email) layout of quotes can also be personalised to suit, including the option of sending your quote information directly to a MS-Word document





Job Header Screen

- A** Jobs & Enquiries are **classified** by Job Type, Status, Category, Project Manager and Priority
- B** Project or Job name as the client would describe it. This field is **often copied into a quotation** at a later point
- C** The Quotation menu is available in the **Quick Navigation Menu** for easy access. Quotes are also linked to Cost Estimating menus (3 & 4 in this example)
- D** Once the job has been 'won', it can **quickly** be 'opened' and then work can be scheduled to begin

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

File Record Edit View Go Advanced Menu Graph Design Help

Job No **A** 100019 Job Id ABSCONN.R.100019 Input Date 24-Oct-2014
 Status 2.QUOTE Job Type AV Starting
 Category INSTALL Order No Completed
 Prj Mgr DAVID.W Origin REFERRAL Follow Up 31-Oct-2015
 Priority 2.NORMAL Inv? Y Estimate \$ 22,000

Contact Paul Leim Phone 9645 1120
 Client Absolute Contracting (NSW) Pty Ltd Mobile 0406523145
 Site 100 Sydney Road Site Ph 9645 1121
 Address The Cleveland Building Cr Status 1.LARGE
 LINDFIELD NSW 2070 Cr Limit \$ 20,050

Contract \$ 0
 Pr Claims \$ 0
 Invoiced \$ 0
 Bal O/s \$ 0
 To Invoice \$ 0
 % Complete 0.00

Project **B** Install of Board Room A/V Setup
 Comments Room is 10x20m

Form help Field help Daily-Log Alerts Rates Accounting Tables Reports Sub Jobs

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

Via the next (lower) menu you can create a job cost estimate, a quotation for the job, and any number of sales invoices. Before attempting to add a new job, you should have already entered the prospect/customer's details under Menu [1].

A separate job register is also maintained under each customer's file.

View Client Contacts Documents
 Job-Types Addresses Video
 Map Directions Manual

Menu

1. Make Appointments
2. Financial Summary
3. Summary Estimate/Quotes
4. Detailed Estimating
5. Budget/Actual/Variances
6. Tracking - Project Management
7. Quotations
8. Questions & Answers
9. Open Job - Schedule
10. Job Invoicing
11. Transactions & Processes
12. Configure Job Reports

Image Folder

1 from 1

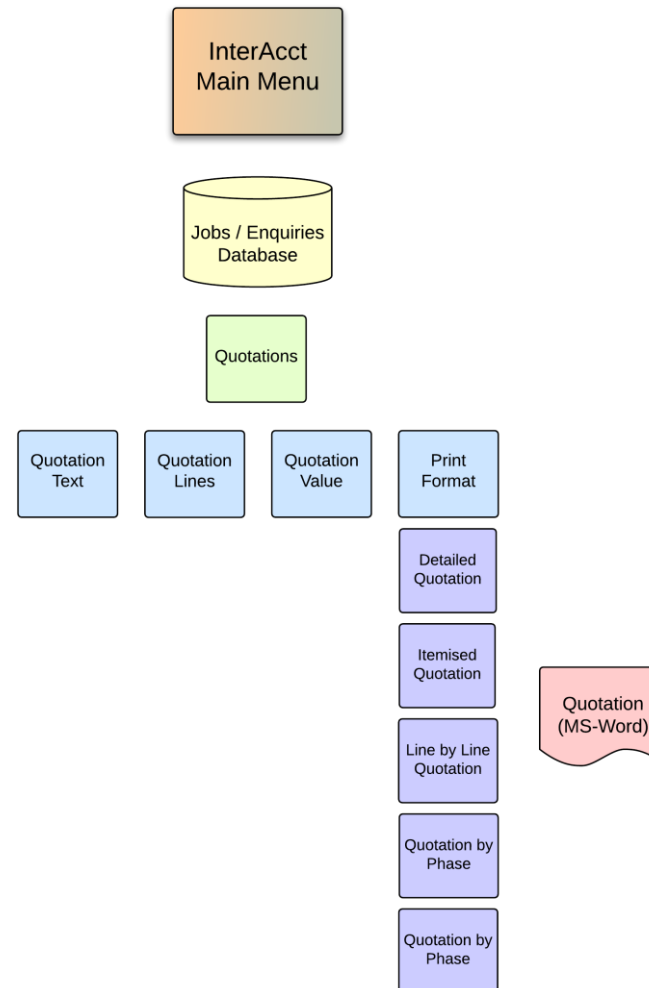


Standalone Job Quotation Structure

*Quoting with confidence that you have the correct profit margin in order to win profitable jobs is the **key to success***

There are several areas under a Job where you can prepare a customer quotation:

- ✓ **Standalone** – often related to the Job's Budget
- ✓ Detailed Cost Estimating
- ✓ Summary “Quick” Estimating
- ✓ Small Repair Work (Tasks)





Key Features & Advantages

	Feature	Advantage	Base?
Email	Print or Email	Quotations can be printed and mailed, or emailed as a file attachment	Option
MS-Word	Link to MS-Word	Quotation information can be automatically sent to a MS-Word document in a ready to use format.	Option
Format	Print Formats	There are several different print format options that control the amount of details you wish to show on your quotation. Most are linked to your job's Budget, and therefore don't have to be re-input, saving time.	Option
Story Book Quotes	Line by Line Format	The most popular quote format where a personalised library of Quote Lines with comments can be created. Job Invoices can be in the same format.	Option
Letter	Personalised	The quote can be personalised like a letter to the Prospect, to fit a window faced envelope	Option
Photos	Photos Attached	There is an option to have a number of photos, with captions attached to the Quote	Option
Options	Options, Exclusions	The quote can list out various Options that are available, as well as noting any Exclusions	Option
Terms	Clauses, Terms & Conditions	Selectively attach your own clauses, plus a Standard Set of Terms & Conditions	Option



Screen 1: Quotation Details

Job Quotation Details:

This is the “Header” screen for the quotation.

- ✓ Define the Print Format style
- ✓ Input the Line Details (for a ‘L’ type format style)
- ✓ Enter any free format Quote Text
- ✓ Add any Quote Options
- ✓ Add any Notes & Exclusions
- ✓ Select which quote clauses will print, and in what sequence.

InterAcct Demo - [QUOTATION DETAILS - display, Design and Make Dies for Drilling Project, ENGINEER, 100]

File Record Edit View Go Advanced Menu Graph Design Help

Contact 001 Kenneth Carruthers Quote No 300006 Status MAIN
 Dear ? Ken Quoted Tue 28-Jan-2014
 Position General Manager Exp Close Sat 1-Feb-2014
 Quote by LARRY.M Larry Mellowes Reqd by Sat 15-Feb-2014
 Title Managing Director Sold on

Print Format L Line by Line Print Image? Y
 Quote, excl \$ 6,075.00 Print Image Desc? Y
 GST Content \$ 607.50 Products ? N
 Quote Value \$ 6,682.50
 Exp Profit 5,827.00
 Prob % 50
 Exp Sales \$ 3,037.50

Client Id CORENTFA Corporate Enterprises Pty Ltd
 Job Heading 1 Design and Make Dies for Drilling Project
 Job Heading 2
 Close Strategy Show Photos of Similar Jobs

Budget Open Job
 Estimates Summ. Est

Menu

- Quote Headings
- Quote Text
- View : Line Items
- Quote Options
- Notes & Exclusions
- Quotation Clauses
- Contact History
- Attach Images
- Print Images
- Print: Quotation - MS-Word
- Quote/Letter, Lines
- View : Client Details
- Open Job Now ?

Form help Field help Budget Alerts Contacts Clauses Accounting Employee Tables Products

This is where you can create your quotation print (for a job).

QUOTE HEADINGS list, Design and Make Dies for Drilling Project, ENGINEER, 100

	Seq No	*Quote Heading	Quote \$	Discount \$	GST \$	Total \$	Quantity #
1	10	Preparation	2,825.00	0.00	282.50	3,107.50	1
2	20	Prototype	3,250.00	0.00	325.00	3,575.00	1
			6,075.00	0.00	607.50	6,682.50	



Screen 2: 'L' Type Line Items

Line by Line Type Quote:

The Line by Line 'L' Type Quote style allows the User to enter anything onto the quote.

It does not need to relate to the Job's Budget Sell price.

Once the Line item has been created, it can be recalled to be used on other Quotes, as well as Job Invoices in the same Line by Line style format.

It is often called "*story book*", where you can very quickly prepare a quote that shows a lot of work notes to the customer, but avoids showing the Cost Item Details.

InterAcct Demo - [QUOTE LINES - display , Design and Make Dies for Drilling Project, ENGINEER, 100, Preparation]

File Record Edit View Go Advanced Menu Graph Design Help

Quote Heading Design Phase

Line Prepare CAD Drawings to meet specifications
Submit to Client
Make amendments, as required

Qty #	25.00	Rate \$	112.00	Per	HOUR	\$	2,800.00
	Calculation		Consumables			Amount \$	25.00
						Sales \$	2,825.00
						GST \$	282.50
						Quote \$	3,107.50

Menu

1. Add another Quote Line
2. Heading Comments
3. Return to Quotation
4. Budget by Phase
5. View : Cost Estimate

Form help Field help

This is where you can enter any number of quote line items. Dollar totals for all quote lines should agree with the quote total \$.



Screen 3: 'L' Type Product Items

Line by Line Quote Product Items:

InterAcct also allows Product Items from its Product / Material Database to be added to the Job Quotation.

InterAcct Demo System - [QUOTE HEADINGS - display , Install of Board Room A/V Setup, AV, 100 Sydney Road]

File Record Edit View Go Advanced Menu Graph Design Help

Seq No 20 Phases ? Y

*Quote Heading Installation

Quote \$	8,211.48
Discount \$	302.52
Total \$	9,032.64
GST \$	821.16

Phase INSTALL

Quantity # 1

Job Type AV

Menu

1. Quote Line Items
2. Quote Product Items
3. Heading Comments
4. Quotation Comments
5. View : Customer
6. View : Cost Estimate
7. Supplier Database
8. Product Groups/Items

QUOTE PRODUCT ITEMS list , Install of Board Room A/V Setup, AV, 100 Sydney Road, Installation

File Record Edit View Go Advanced Graph New Design Help

	Description	Total Qty#	In-Stock#	Quote \$	Ind GST\$
1	ScreenTechnic Commercial Hanging 100ir	1.000	3.000	887.80	976.58
2	100M CAT6 Roll	50.000	100.000	75.50	83.05
3	2014 Sony X1000 2CH 100watt AMP	1.000	-1.000	641.25	705.38
4	Floor Speaker Kit 20W RMS 6" Cone	4.000	0.000	1,805.00	1,985.50
5	HD 1920X1080 16:9 Projector	1.000	-1.000	2,579.25	2,837.18
6	HDMI Cable, Male to Male, 1 Metre	2.000	10.000	22.68	24.95
				6,011.48	6,612.64



Screen 4: Printed 'L' Type Quotation

Line by Line Quotation:

Documents printed from the Standalone Job Quotation System are generated in Microsoft Word by default.

The use of Microsoft Word enables the reports to have a polished look, and allows Users to be in a familiar environment where the documents can be Edited, Saved, Exported and Printed.

JobQuote-L-r-20141110123048 [Read-Only] [Compatibility Mode] - Word

REVIEW VIEW

AaBbCcDc AaBbCcDc AaBbCc AaBbCc AaB AaBbCcD AaBbCcDc AaBbCcDc AaBbCcDc AaBbCcDc AaBbCcDc AaBbCcDc

Normal No Spac... Heading 1 Heading 2 Title Subtitle Subtle Em... Emphasis Intense E... Stror

Styles

InterAcct Software Pty Ltd
 PO Box 786
 Manly NSW 1655
 Ph: 1300 66 26 26 Fax: 02 9975 7269
 www.interacct.com.au | sales@interacct.com.au

Quotation #300019

Mr Paul Leim
 General Manager
 Absolute Contracting (NSW) Pty Ltd
 100 Sydney Road
 The Cleveland Building
 LINDFIELD NSW 2070

Quote Date Novemer 10, 2014
Job Number 100020
Client Code ABSCONNRR
Your Contact Dave Webster
 dwebster@hifi.net.au

Dear Paul,

Please find attached quotation details for the installation of your Presentation room.

Description	Quantity	Per	Price	Total
Design Phase • Defining room requirements • Research & Selecting of appropriate hardware • Designing room layout	1.0000	DESIGN	\$ 420.00	\$ 420.00
Installation, Commissioning • Purchase of all hardware • Installation of Projecter Screen + Lifter + Screen • Instalation of Board Meeting Loudspeaker Communications • Networking • Configuration	1.0000	ROOM	\$ 6,764.00	\$ 6,764.00
			Net Quote Value	\$ 7,184.00
			GST Component	\$ 718.40
			Total Quote Value	\$ 7,902.40

Yours faithfully,

Dave Webster
 Sales

PO Box 786 Ph: 1300 66 26 26 www.interacct.com.au
 Manly NSW 1655 Fax: 02 9975 7269 sales@interacct.com.au

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Screen 5: Printed 'S' Type Quotation

Summary Quotation:

The Summary or 'S' Type Quotation allows a User to quickly generate a quotation based on text input and a simple grand total Quote Value.

The process is as simple as:

- ✓ Input text to appear on Quotation
- ✓ Input Quotation Value
- ✓ Print Quotation

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Quotation #300010

Mr Paul Leim
 General Manager
 Absolute Contracting (NSW) Pty Ltd
 100 Sydney Road
 The Cleveland Building
 LINDFIELD NSW 2070

Quote Date November 03, 2014
 Job Number 100019
 Client Code ABSCONNR
 Your Contact Joan Mcgee
 joan.mcgee@hifi.net.au

Dear Paul,

Please find the \$ Value of our Quotation for the Installation of a Board Room Audio / Visual System.

This price includes:

Projector Screen + Lifter + Projector
 2x Connected Conference Call Phones
 Audio System (4x Bose Speakers + Amplifier)
 Full Installation and Configuration

Please contact me if more details are required

Net Quote Value	\$ 5,800.00
GST Component	\$ 580.00
Total Quote Value	\$ 6,380.00

Yours faithfully,

Joan Mcgee
 Sales

PO Box 786
 Manly NSW 1655

Ph: 1300 66 26 26
 Fax: 02 9975 7269

www.interacct.com.au
 sales@interacct.com.au

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Screen 6: Printed 'I' Type Quotation

Itemised Quotation:

The 'I' Type Quotation groups costs into:

- ✓ Labour
- ✓ Sub-Contractors
- ✓ Materials
- ✓ Sundry and
- ✓ Machine costs

The report lists these the individual components and the cost under each Cost Group.

Quotation #300025

Mr Paul Leim
 General Manager
 Absolute Contracting (NSW) Pty Ltd
 100 Sydney Road
 The Cleveland Building
 LINDFIELD NSW 2070

Quote Date Novemer 20, 2014
Job Number 100020
Client Code ABSCONNR
Your Contact Dave Webster
 dwebster@hifi.net.au

Dear Paul,

Please find attached quotation details for the installation of your Presentation room.

Description	Total
Group: Labour	
Apprentice	\$ 1,050.00
Standard Labour	\$ 1,500.00
Group: Materials	
HD 1920X1080 16:9 Projector	\$ 2,579.00
ScreenTechnic Commercial Hanging 100inch	\$ 888.00
ScreenTechnic Vertical Projector Lifter	\$ 1,737.00
Group: Sundry	
Overhead Recovered	\$ 102.00
Net Quote Value	\$ 7,856.00
GST Component	\$ 785.60
Total Quote Value	\$ 8,641.60

Yours faithfully,

Dave Webster
 Sales



Screen 7: Printed 'D' Type Quotation

Detailed Quotation:

The 'D' Type Quotation shows a summary of by:

- ✓ Project Phase, and then
- ✓ Cost Group

The individual Cost Item Details are not shown.

Quotation #300023

Mr Paul Leim
 General Manager
 Absolute Contracting (NSW) Pty Ltd
 100 Sydney Road
 The Cleveland Building
 LINDFIELD NSW 2070

Quote Date Novemer 10, 2014
Job Number 100020
Client Code ABSCONNR
Your Contact Dave Webster
 dwebster@hifi.net.au

Dear Paul,

Here is your test quote "D" Type

Description	Total
Phase: System Design	
Labour	\$ 1,050.00
Sundry	\$ 42.00
Phase: Installation	
Labour	\$ 1,500.00
Materials	\$ 5,204.00
Sundry	\$ 60.00
Net Quote Value	\$ 7,856.00
GST Component	\$ 785.60
Total Quote Value	\$ 8,641.60

Yours faithfully,

Dave Webster
 Sales



Screen 8: Printed 'P' Type Quotation

Quotation by Phase:

The Quotation by Phase ('P' Type) displays the same details as a 'D' Type Quotation, that is:

- ✓ Project Phase, and then
- ✓ Cost Group

However, it is displayed in a grid like view

Quotation #300020

Mr Paul Leim
 General Manager
 Absolute Contracting (NSW) Pty Ltd
 100 Sydney Road
 The Cleveland Building
 LINDFIELD NSW 2070

Quote Date November 10, 2014
Job Number 100020
Client Code ABSCONNR
Your Contact Dave Webster
 dwebster@hifi.net.au

Dear Paul,

Description	Labour	Subbies	Materials	Other	Machines	Total
Main Job Phase						\$ 0.00
System Design	\$ 1,050.00			\$ 42.00		\$ 1,092.00
Installation	\$ 1,500.00		\$ 5,204.05	\$ 60.00		\$ 6,764.00

Net Quote Value \$ 7,856.05
 GST Component \$ 785.61
Total Quote Value \$ 8,641.66

Yours faithfully,

Dave Webster
 Sales



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

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