

## Tracking In-House Work (and Charges)

CurrentTrack® enables you to carefully manage projects specific to your agency (e.g. new employee orientation, the company holiday party, self-promotion efforts, Sick/Personal/Vacation time, etc.).

In this training document, you'll learn how to track Tasks and record time and expenses incurred along the way. First, create a Client Folder for your own agency, via the Agency Administration menu (Figure 1).

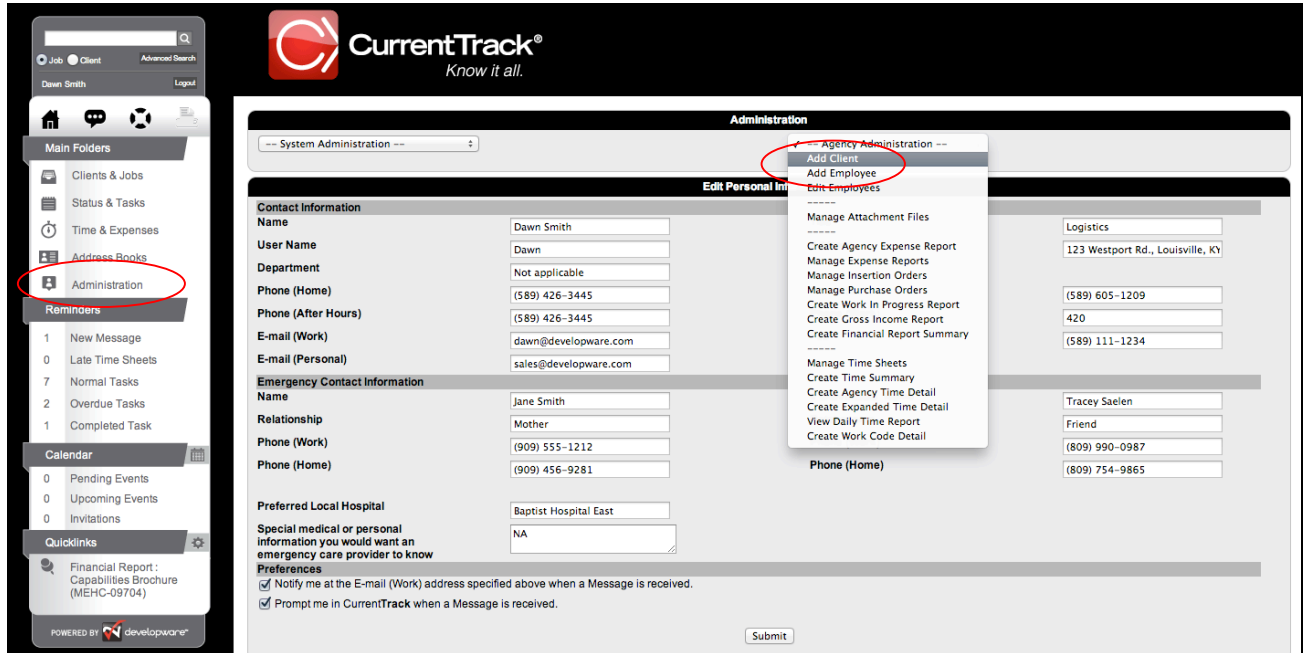


Figure 1

Next, open a job within the Client Folder (Figures 2-3).

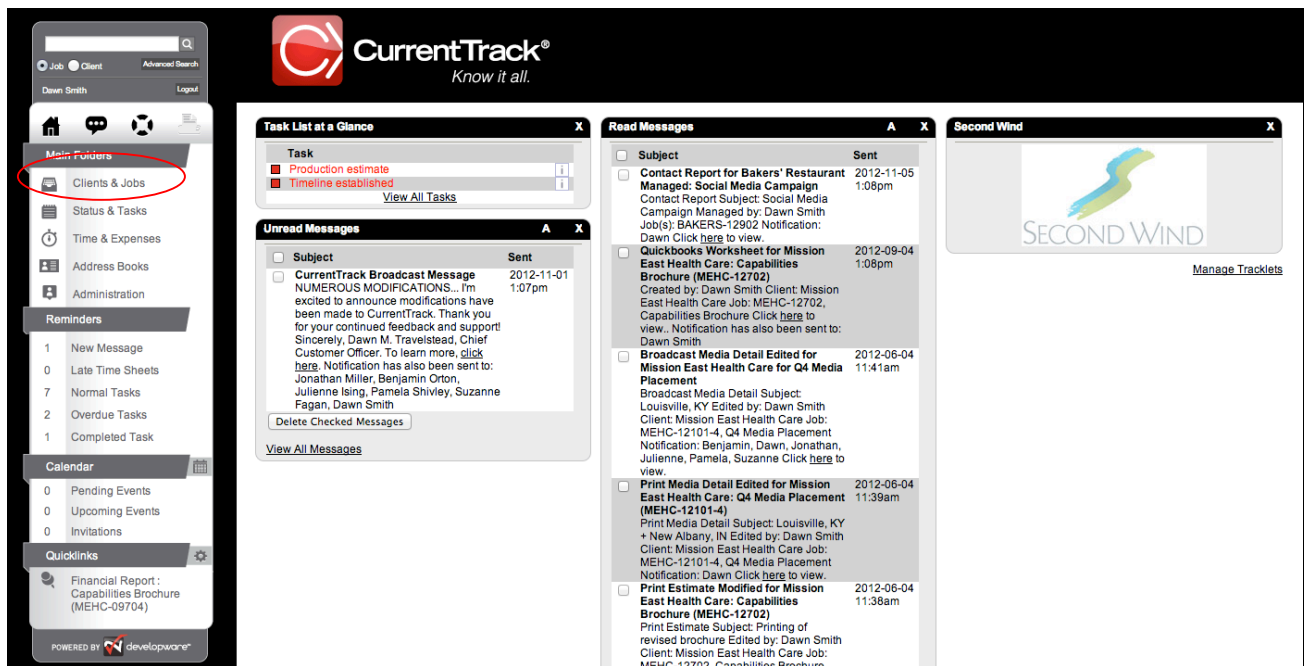


Figure 2

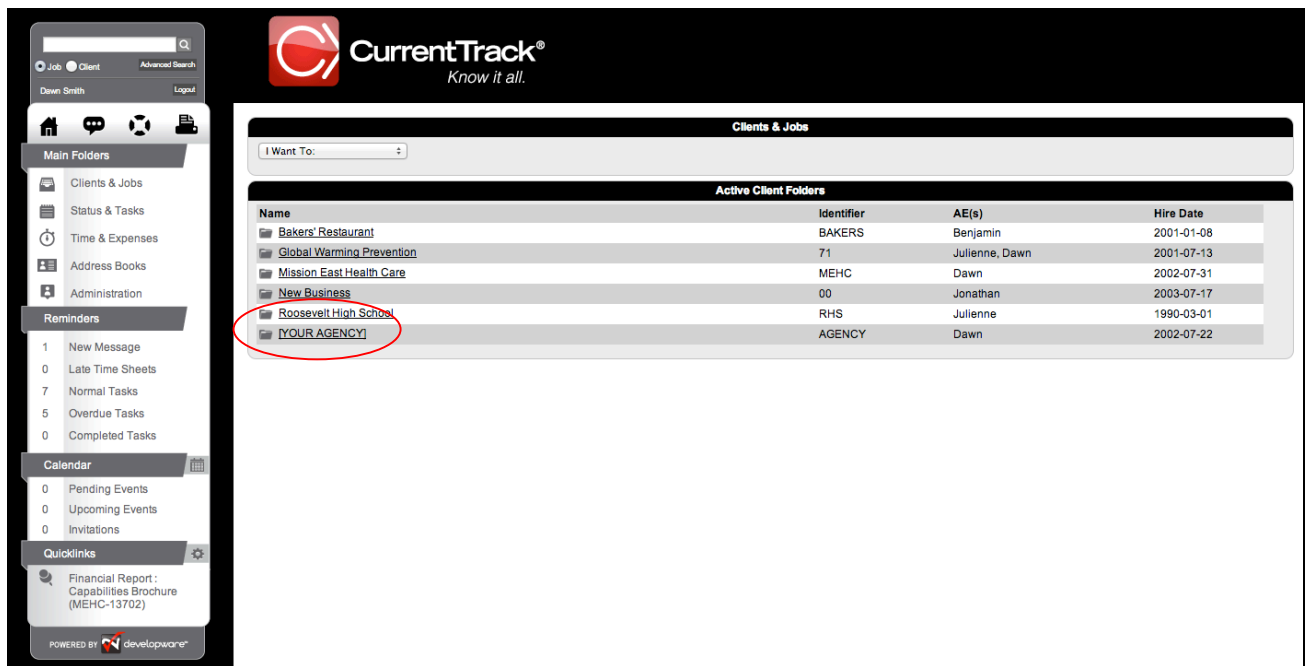


Figure 3

Next, add Tasks to the job's Workback Schedule (e.g. "Order business cards for Robert" or "Contact caterer")(Figure 4). All active Tasks, because they bear a Status of Working, will appear on the Assigned Task List of the Responsible Employee(s)(Figure 5).

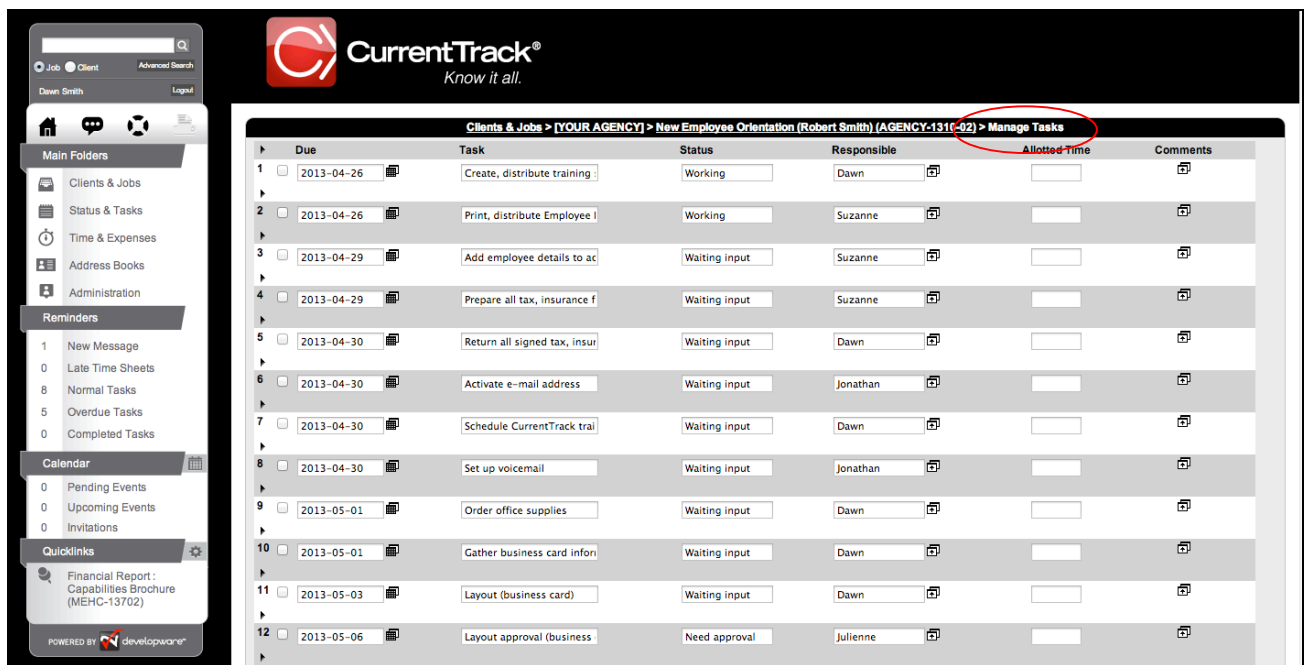


Figure 4

Job

Client

Advanced Search

Dawn Smith

Logout

Home

Messages

Calendar

Address Books

Administration

Main Folders

Clients & Jobs

Status & Tasks

Time & Expenses

Address Books

Administration

Reminders

2 New Messages

0 Late Time Sheets

6 Normal Tasks

2 Overdue Tasks

0 Completed Tasks

Calendar

0 Pending Events

0 Upcoming Events

0 Invitations

Quicklinks

Financial Report: Capabilities Brochure (MEHC-13702)

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CurrentTrack®

Know it all.

Status & Tasks

I want to:

Assigned Task List (2013-04-25 to 2013-05-25)

Dawn Smith

| P                        | Due        | Time | Client                    | Job Title                               | Number         | Task                                 | Allotted       | Resp. |
|--------------------------|------------|------|---------------------------|-----------------------------------------|----------------|--------------------------------------|----------------|-------|
| <input type="checkbox"/> | 2013-04-15 |      | Mission East Health Care  | Capabilities Brochure                   | MEHC-13702     | Prepare, present Estimate            | Dawn           |       |
| <input type="checkbox"/> | 2013-04-17 |      | New Business              | RFP: Communication Concepts             | 00-1310-01     | Marketing plan outline               | Dawn, Julianne |       |
| <input type="checkbox"/> | 2013-04-26 |      | Roosevelt High School     | 1/4-Page Ad (Open House)                | RHS-13201      | Ad specs from publication            | Dawn           |       |
| <input type="checkbox"/> | 2013-04-26 |      | [YOUR AGENCY]             | New Employee Orientation (Robert Smith) | AGENCY-1310-02 | Create, distribute training schedule | Dawn           |       |
| <input type="checkbox"/> | 2013-05-01 |      | [YOUR AGENCY]             | Letterhead Re-Design                    | AGENCY-13701   | Prepare, review Estimate             | Dawn           |       |
| <input type="checkbox"/> | 2013-05-21 |      | Mission East Health Care  | Benefits Brochure                       | MEHC-13701     | Prepare, present Estimate            | Dawn           |       |
| <input type="checkbox"/> | 2013-05-21 |      | Global Warming Prevention | Tradeshow Display                       | 71-13702       | Production estimate                  | Dawn           |       |
| <input type="checkbox"/> | 2013-05-23 |      | Bakers' Restaurant        | E-Newsletter Production                 | BAKERS-13901   | Compile recipient list               | Dawn, Benjamin |       |

Personal To-Do List (2013-04-25 to 2013-05-25)

| P                        | Due        | Time     | Task                    | Job Title                         | Number   |
|--------------------------|------------|----------|-------------------------|-----------------------------------|----------|
| <input type="checkbox"/> | 2013-04-30 | 10:00 am | Pick up props for shoot | RFP: Starlight Custard (00-13803) | 00-13803 |
| <input type="checkbox"/> | 2013-05-08 |          | Insurance info. to HR   |                                   |          |

Application Options

From: 2013-04-25 To: 2013-05-25

Change Dates

Figure 5

After making a phone call, placing an order, etc., file a Progress Report under the job; cc: internal team members (if applicable)(Figure 6). If ordering business cards for a new employee, for example, file a Purchase Order; track design time as well (Figure 7).

Job

Client

Advanced Search

Dawn Smith

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Financial Report: Capabilities Brochure (MEHC-13702)

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CurrentTrack®

Know it all.

Clients & Jobs > [YOUR AGENCY] > New Employee Orientation (Robert Smith) (AGENCY-1310-02) > Create Progress Report

Subject

Summary

Critical Details

What

When

Who

Add Row

Viewable

Client

Vendor

Client User(s)

Vendor User(s)

Figure 6

3

| QTY | Specs/Item Description | Unit Price Approx. | Price | Tax                      |
|-----|------------------------|--------------------|-------|--------------------------|
| 1   |                        | \$                 | \$    | <input type="checkbox"/> |
| 2   |                        | \$                 | \$    | <input type="checkbox"/> |
| 3   |                        | \$                 | \$    | <input type="checkbox"/> |
| 4   |                        | \$                 | \$    | <input type="checkbox"/> |
| 5   |                        | \$                 | \$    | <input type="checkbox"/> |
| 6   |                        | \$                 | \$    | <input type="checkbox"/> |
| 7   |                        | \$                 | \$    | <input type="checkbox"/> |
| 8   |                        | \$                 | \$    | <input type="checkbox"/> |
| 9   |                        | \$                 | \$    | <input type="checkbox"/> |
| 10  |                        | \$                 | \$    | <input type="checkbox"/> |
| 11  |                        | \$                 | \$    | <input type="checkbox"/> |
| 12  |                        | \$                 | \$    | <input type="checkbox"/> |
| 13  |                        | \$                 | \$    | <input type="checkbox"/> |
| 14  |                        | \$                 | \$    | <input type="checkbox"/> |

Figure 7

To track Sick, Personal and Vacation time, as well as any non-billable, agency-specific time, open an In-House Charges job within the agency Client Folder. This can be done monthly (e.g. “May In-House Charges”), quarterly (“Q2 In-House Charges”) or yearly (e.g. “2013 In-House Charges”).

Include at least one Working Task in the job’s Workback Schedule -- “Review charges/time” -- that’s Due on the last day of the month. This applies to all three jobs types listed above. You may have more than one “Review charges/time” Task, depending on your job preference (e.g. “Q2 In-House Charges” > 4/30/13, 5/31/13, 6/30/13)(Figure 8).

|    | Due        | Task                | Status        | Responsible | Allotted Time | Comments |
|----|------------|---------------------|---------------|-------------|---------------|----------|
| 1  | 2013-04-30 | Review charges/time | Working       | Pam         | .25           |          |
| 2  | 2013-05-31 | Review charges/time | Working       | Pam         | .25           |          |
| 3  | 2013-06-30 | Review charges/time | Working       | Pam         | .25           |          |
| 4  | 2013-07-01 | Archive job         | Waiting input | Pam         | .25           |          |
| 5  |            |                     |               |             |               |          |
| 6  |            |                     |               |             |               |          |
| 7  |            |                     |               |             |               |          |
| 8  |            |                     |               |             |               |          |
| 9  |            |                     |               |             |               |          |
| 10 |            |                     |               |             |               |          |

Target Job Complete Date: 2013-06-30

Viewable: ☐ Client ☐ Vendor (Select All Tasks)

Figure 8

Transfer any incurred time and expenses to your outside accounting program; archive the job.