

Account Service

- Use the hotlinks atop content boxes to navigate throughout the system.
- Check your Pending Proposals often to make sure Guests are responding to proposed Events.
- Place Upcoming Events on your Calendar as soon as you're aware of them.
- If a Client will be attending an Event, include them by checking the box beside Client View.
- File a Change Order when modifications affect time and cost estimates.
- Paste Client comments received via e-mail into a Change Order or Progress Report.
- Use the Client Contact Report to recap a weekly Client meeting or lengthy phone call.
- Avoid making verbal requests. Instead, use a Client Contact Report or Progress Report.
- Always attach Due dates to the Critical Details in your Client Contact Report.
- Include Budgetary Considerations in your Client Contact Report, even if only "guesstimates."
- Don't make time and cost commitments without first talking with your System Administrator.
- Use the  menu, at the top of the screen, to quickly create a Change Order, Progress Report and other helpful documents.
- Misfile a form in CurrentTrack? Simply go to *Clients & Jobs – Client – Job One Sheet – I Want To: Open Documents Folder*. Click its Move link, enter the correct Job Number and click Move Document.
- Educate your Clients. An understanding of project timing is key to successful communication.
- Complete the E-mail (Work) field of Personal Information and check the Notify box to receive Messages outside of CurrentTrack.
- Clearly communicate when you're going to be out of the office so Tasks can be assigned accordingly.
- Use a [job] Financial Report to monitor the amount of time being spent on its completion.
- Use a similar Sleeping [job] Financial Report for reference when giving your Client a quote.
- Add a Quicklink for a frequently viewed Client Folder, Workback Schedule or document.
- Make www.CurrentTrack.net your browser home page.
- Carefully record time spent working on Tasks throughout the course of your day.
- Although you've clicked Complete Time Sheet, you may still edit it until midnight. After that, you can't edit it without talking to your System Administrator.
- Add the Budget vs. Actual Tracklet to your Dashboard.
- Associate Keywords with the file you're uploading to a job's Attachment Folder.
- On all Printer Friendly Media Details, reference the (n) or (g) symbol, to determine if you're viewing net or gross figures.