

Accounting Department

- Forget to copy someone on a document? Simply edit it, check the box beside (re)cc and Submit.
- Paste Client and Vendor comments received via e-mail into a Change Order or Progress Report.
- Place Upcoming Events on your Calendar as soon as you're aware of them.
- Use the Financial Report Summary to monitor budgeted vs. actual figures by Client, Job Type, etc.
- 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.
- Add a Quicklink for a frequently viewed document (e.g. [job] Financial Report) or Client Folder.
- Make www.CurrentTrack.net your browser home page.
- Use the hotlinks atop content boxes to navigate throughout the system.
- Add the Budget vs. Actual Tracklet to your Dashboard.
- 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.
- Carefully record time spent working on Tasks throughout the course of your day.
- Use the Manage Insertion Orders interface to sort by Vendor, Client, Date range, etc.
- To make an Event appear as a “banner” on your Calendar, check the box beside No Time.
- Use the All Open Jobs List to monitor Job Numbers.
- Clean out your Unread and Read Message boxes often.
- Create Work Codes for Vacation (V) and Sick/Personal (S/P) time (Rate = 0.00).
- Refer to the Work In Progress Report when gathering billing information for a specific date range.
- List your name beside Add Job and Purchase Order in Default Notifications.
- Use the Manage Purchase Orders interface to sort by Vendor, Client, Date range, etc.