

## FOR REPORTING ON JOBS USE EXPORT TO EXCEL FROM YOUR JOB PAGE

Right click and select Export to Excel. You need to have unticked the 'Use Icons' for this option to be available.

Export to Excel

**Note:** The system will export out exactly the information displayed on your Job Page.

Client notes if displaying on your Job Page will also export.

Milestone comments will **not** export to Excel.



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# ACCOUNTANTS OFFICE JOB MANAGER - GENERAL USER

## Quick Reference Guide

Home Page - MyWork

No Filter

Target Date

Job Sheet - 32 Jobs/Schedules

| Client/Assignment                           | Job/Sche.  | Assigned To   | Budget              | Total WIP         | Target Date | Days...    | Books In | Job Stat... | Queries | Review | Complete |
|---|------------|---------------|---------------------|-------------------|-------------|------------|----------|-------------|---------|--------|----------|
| <a href="#">Click here to add a new job</a> |            |               |                     |                   |             |            |          |             |         |        |          |
| <b>Overdue</b>                              |            |               |                     |                   |             |            |          |             |         |        |          |
| Smart Sally/Accounts                        | Consulting | Clare Dods    | \$3,000.00          | \$0.00            | 29/02/2008  | 6          | ✓        |             |         |        |          |
| Zoltan's Rosebend Plu Limited/Acc.          | 2008       | Debra Stevens | \$7,000.00          | \$0.00            | 12/02/2008  | -15        |          |             |         |        |          |
|   |            |               | <b>\$10,000.00</b>  | <b>\$0.00</b>     |             | <b>-21</b> |          |             |         |        |          |
| <b>This week</b>                            |            |               |                     |                   |             |            |          |             |         |        |          |
| Abbot and Rankine Pty Limited/Acco.         | 2008       | Simon Bache   | \$12,000.00         | \$0.00            | 29/02/2008  | 2          | ✓        | ✓           |         |        |          |
| Abbot and Rankine Pty Limited/Acco.         | 2008       | Clare Dods    | \$10,000.00         | \$0.00            | 27/02/2008  | 0          | ✓        | ✓           |         |        |          |
| Abbot and Rankine Pty Limited/ASAC          | 2011       | Simon Bache   | \$30,000.00         | \$0.00            | 29/02/2008  | 2          |          |             |         |        |          |
| Abbot and Rankine Pty Limited/ASAC          | 01 BAS     | Arnold Hill   | \$20,000.00         | \$440.00          | 29/02/2008  | 2          | ✓        | ✓           |         |        |          |
| Clark & Co/Accounts                         | 2009       |               | \$0.00              | \$0.00            | 29/02/2008  | 2          |          |             |         |        |          |
| Kirston Smith/Accounts                      | 2007       | Simon Bache   | \$2,000.00          | \$0.00            | 29/02/2008  | 1          | ✓        |             |         |        |          |
| Smart Sally/Accounts                        | 2009       | Simon Bache   | \$12,000.00         | \$0.00            | 29/02/2008  | 1          |          |             |         |        |          |
| Value Added Pty Ltd/Accountancy             | 2008       | Adam Friedman | \$4,000.00          | \$1,400.00        | 29/02/2008  | 1          | ✓        |             |         |        |          |
| Zoltan's Rosebend Plu Limited/Acc.          | 2008       |               | \$0.00              | \$0.00            | 29/02/2008  | 2          |          |             |         |        |          |
|   |            |               | <b>\$90,000.00</b>  | <b>\$1,840.00</b> |             | <b>13</b>  |          |             |         |        |          |
| <b>Next week</b>                            |            |               |                     |                   |             |            |          |             |         |        |          |
| Ben Technical Ltd/Accounts                  | 2007       | Daniel Samson | \$2,500.00          | \$0.00            | 7/03/2008   | 9          | ✗        |             |         |        |          |
| Jones Super Fund/Audit                      | Audit      | Melbain Green | \$500.00            | \$0.00            | 11/03/2008  | 13         | ✓        | ✓           |         |        |          |
| Jones Kenneth/Consulting                    | Consulting | Alex Barlin   | \$5,000.00          | \$0.00            | 9/03/2008   | 11         |          |             |         |        |          |
|   |            |               | <b>\$8,000.00</b>   | <b>\$0.00</b>     |             | <b>33</b>  |          |             |         |        |          |
| <b>This Month</b>                           |            |               |                     |                   |             |            |          |             |         |        |          |
|   |            |               | <b>\$131,350.00</b> | <b>\$4,440.00</b> |             | <b>267</b> |          |             |         |        |          |

## JOB PAGE SORTING

### By Partner

The Client Partner field is available by right clicking on your Job Page, selecting the field chooser and dragging the Client Partner field into your Jobs page display

You can sort by clicking on the column header to sort by Partner surname ascending or descending.



You can also sort on the other columns ascending or descending:

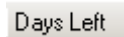
### By Assigned to



### By Target date

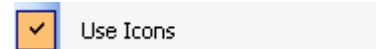


### By Days left



## USING DIFFERENT DISPLAYS ON YOUR JOB PAGE

You have two display options for milestones in the Job Page control and you can switch between the displays by using the right click 'Use icons' option:



With the 'Use Icons' option ticked users will see the status of the milestone displayed as an icon.

With the 'Use Icons' option unticked users will see the milestones displayed in different colours to indicate the status of the milestone. Once a milestone has been marked as complete the completed date will display.

## JOB PAGE SHOW FIELD CHOOSER

The default columns displayed can be changed by **right clicking** on the Job Page control and choosing the '**Show field chooser**' option to drag and drop fields in the display. When you are done select the **Save Job Page** option from the task bar.

**Note:** The size of the actual Job Page cannot be altered.

## JOB PAGE GROUPING

You can pull any column or any field from the field chooser into your grouping as per the example below.



**Note:** The fields in your grouping do not have to appear in your Job Page columns.

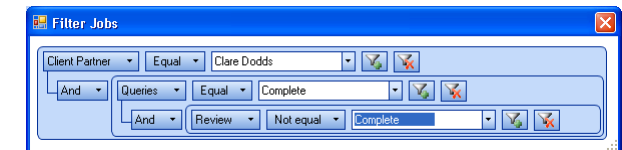
## JOB PAGE FILTERING


You can filter your Job Page by clicking on the **No Filter** or the existing filter in the top left of your Job Page.

[No Filter](#)

If you want to change your Job Page to permanently have the filter then click on the **Save Homepage** option in the task bar.

You can have several levels of filtering.



 To add a filter line

 To delete the filter line