newsletter

PROAD Software

Introducing PROAD with a new time recording feature

The next big highlight for our contract customers is in the wings

At great deal of attention was spent on PROAD software's big summer release, which was delivered from August this year to all of our contract customers.

In addition to many enhancements and new features, compatibility with the latest Office and operating systems has been ensured.

More detailed descriptions can be found in our last newsletter.

The next major release is coming soon. So you can gain an idea of what we are working on for you, please read on about the individual features and functions you can expect in the next major release.

New time recording with weekly recording and automatic time recording control.

Timesheets have been completely redesigned and will now come with a modern interface and new features. PROAD users will be able to enter their time in a new time tracking window, which has been adapted to the sidebar. We have already implemented recording aids like drag and drop functionality of jobs and

services from the sidebar and these will of course still be available. For clarity, the time and materials detection was separated on separate tabs.

We will also introduce a weekly time recording where users can easily record their time for a week in a „slip" and will

The new time recording

also receive clear views of the recorded times of the week.

To enhance the discipline of time recording in agencies we have developed some new functions for our contract clients: if desired time recording control can be activated to make sure that staff members record their time. If the time recording is not done on time, staff members will get a warning message. You can also set that they will be locked out of PROAD unless time recordings have been done accordingly, thus forcing them to complete timesheets.

Task Management Enhancements

In the major summer release, we introduced a graphical representation of tasks in Gantt charts. This feature will be expanded, allowing job-related presentations of tasks next to employee-related tasks. Also, parallel tasks can be view in a new structure mode.

New design of CRM activities

The activities in the CRM module are also completely revised with both a new

The new time recording with weekly recording

design layout and new features provided. In addition, the user rights have been extended in this area.

Revenue neutral bookings

When posting invoices, a new booking type „sales neutral" has been introduced. This new account type is not recognised in PROAD reporting. However, these bookings will be transferred via

the interface to the financial accounting and is also considered in all accounting-related functions functions and reports.

This type of booking is for example very useful for on-account invoices, which should not be reflected in the company's revenues.

A new module
which will be provided
if required

Job-Partner

With the so-called "Job Partners" a new feature is available with which you can define all involved contacts with their responsibilities on a job.

Of course this function uses the master data of PROAD.

With a corresponding printing function, these job partners can put together a report and send it to a distributor list.

Job Partner in PROAD

Numbering at the turn of the year

The current year is nearing its end. Reason enough for us to take up the issue of numbering in PROAD Professional. Please pay attention to the following points for successful transition into the next year.

You can find your settings for automatic numbering of Jobs, Sales Invoices, Purchase Invoices, Transitory Items, Other Entries and Balance Account in menu [Agency → Options] → Tabpage Numbering. All necessary changes can be made in menu [Agency → Defaults → Counters].

Purchase & Sales Invoices

Usually you will only have need for action if you use the type of numbering option „Year" with setting „1 digit" or „2 digits". If you do so, then option „Show month" has to be taken into account:

- **Show month = No.** The value of fields Purchase invoice or Invoice in the left column will be your reference in menu [Agency → Defaults → Counters] → Tabpage Global.

  Example (Year = 2 digits): If your last invoice number has been e.g. 100384 and you want to restart your numbering, beginning with zero, then set the corresponding value to zero. The first invoice for 2011 will then get number 110001.

- **Show month = Yes.** The value of fields Purchase invoice or Invoice in the right column will be your reference in menu [Agency → Defaults → Counters] → Tabpage Global.

  Example (Year = 2 digits): If your last invoice number has been e.g. 10120384 and you want to restart your numbering, beginning with zero, then set the corresponding value for each month to zero. The first invoice for 2011 will then get number 11010001.

Transitory Items, Other Entries, Balance Account

Independent of your settings for „Year" and „Show month", these invoice types will always refer to the corresponding value in menu [Agency → Defaults → Counters] Tabpage Global. There is no maintenance of an own counter per month (as of purchase and sales invoices).

- **Example (Year = 2 digits, Show Month = No):** If your last invoice number has been e.g. 10456 and you want to restart your numbering, beginning with zero, then set the corresponding value for each invoice type to zero. The first invoice for 2011 will then get number 11001.

Cash out, Cash-in

These invoice types do not use the settings for „Year" and „Show month". You can choose between numbering

per Petty Cash or Global numbering in menu [Agency → Options] → Tabpage Numbering using Checkbox "global".

- **Per Petty Cash:** The value for each corresponding petty cash will be your reference in menu [Agency → De-

faults → Counters] → Tabpage Casbox.

- **Global:** The value of Cash-In will be your reference in menu [Agency → Defaults → Counters] → Tabpage Global (left column).

Jobnumber

You can add the year date as an element of your job number in menu [Agency → Options] → Tabpage Numbering. To restart your job numbering, please find the setting that suits your numbering:

Numbering	Settings
Prefix from single campaign - global number	[Agency → Defaults → Counters] → Tabpage Global → Global Job no. → Set value = 0
Prefix from single campaign - number from campaign	[Agency → Defaults → Counters] → Tabpage Job → One Client/Prospect → Select shortname → Select Campaign → Click Back to 0
Prefix from single campaign - number from company	[Agency → Defaults → Counters] → Tabpage Job → One Client/Prospect → Select shortname → Click Back to 0
Prefix from single campaign - number from single campaign	[Agency → Defaults → Counters] → Tabpage Job → One Client/Prospect → Select shortname → Select Campaign or <All> → Select Single campaign or <All> → Click Back to 0
Prefix from campaign - global number	[Agency → Defaults → Counters] → Tabpage Global → Global Job no. → Set value = 0
Prefix from campaign - number from single campaign	[Agency → Defaults → Counters] → Tabpage Job → One Client/Prospect → Select shortname → Select Campaign or <All> → Select Single campaign or <All> → Click Back to 0
Prefix from campaign - number from campaign	[Agency → Defaults → Counters] → Tabpage Job → One Client/Prospect → Select shortname → Select Campaign → Click Back to 0
Prefix from campaign - number from company	[Agency → Defaults → Counters] → Tabpage Job → One Client/Prospect → Select shortname → Click Back to 0
Prefix from Firma - global number	[Agency → Defaults → Counters] → Tabpage Global → Global Job no. → Set value = 0
Prefix from Firma - number from company	[Agency → Defaults → Counters] → Tabpage Job → One Client/Prospect → Select shortname → Click Back to 0
Prefix from company at end - global number	[Agency → Defaults → Counters] → Tabpage Global → Global Job no. → Set value = 0
Prefix from client + staff - number global	[Agency → Defaults > Counters] → Tabpage Global → Global Job no. → Set value = 0

General information

- Please note that you need the corresponding user right to edit settings in menu Options and Defaults.

- Please note that invoices and credit notes use the same range of numbers.

- Please note that it is required to adjust the accounting period in some accounting systems.

VAT Rate change to 20%

We're just a few days away from the VAT rate rise to 20%. Nowone likes a VAT change, but it's easier to prepare when you know how. Here are the steps to how to quickly amend PROAD to the new VAT rate:
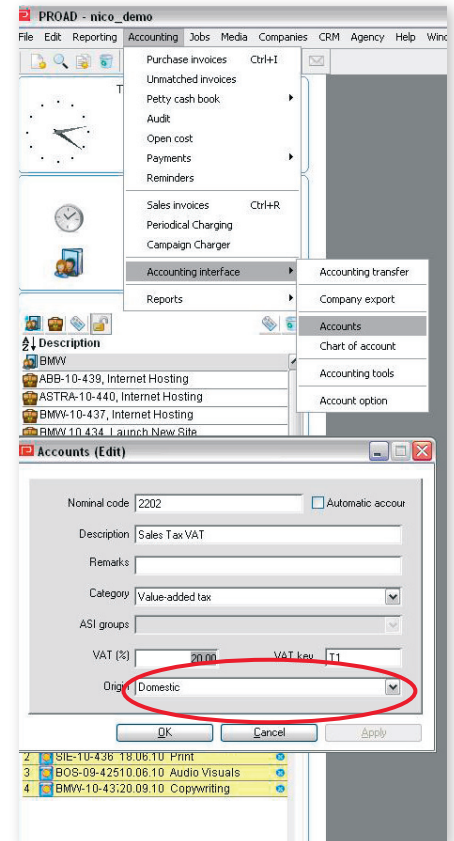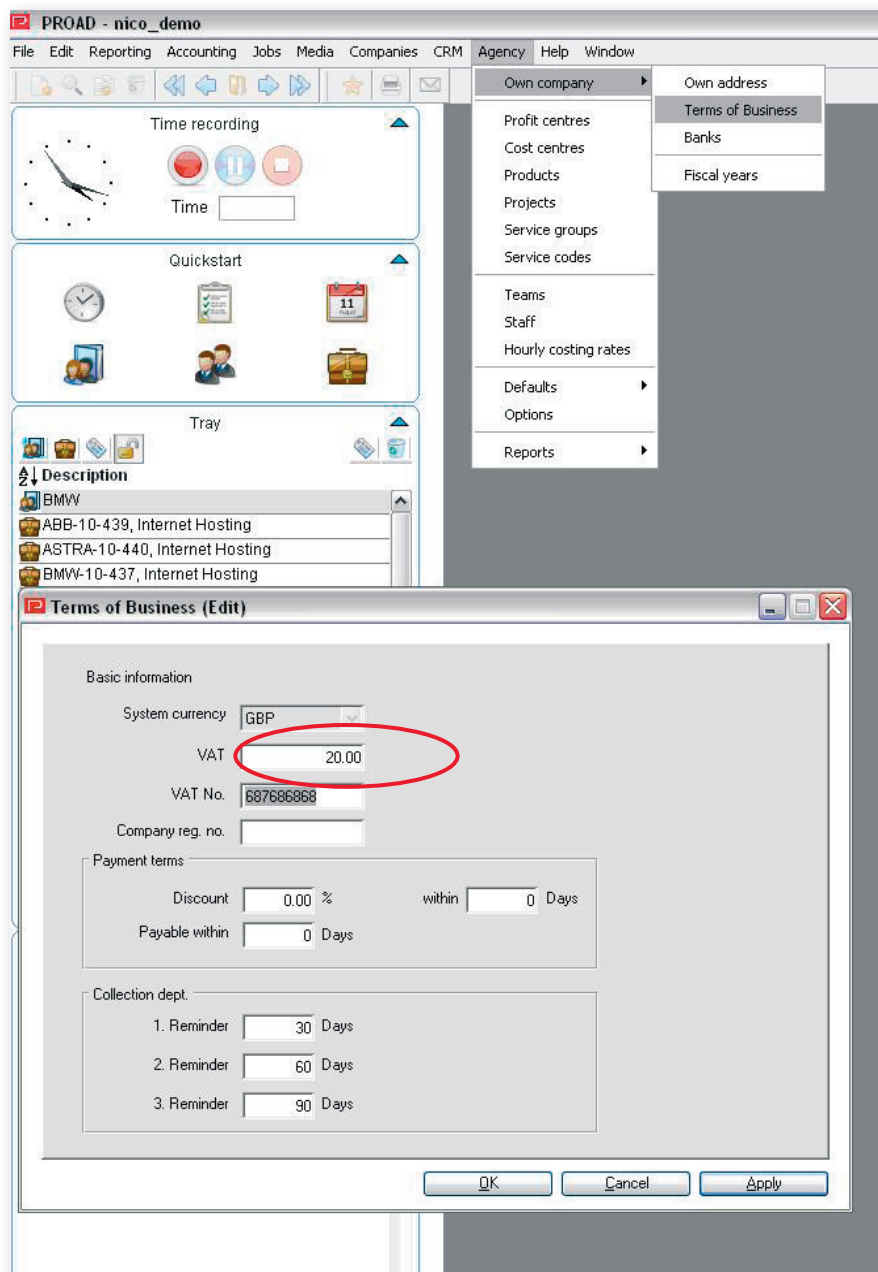
Standard Setting

Please change the standard VAT rate in menu Agency/Own Company/Terms of Business.
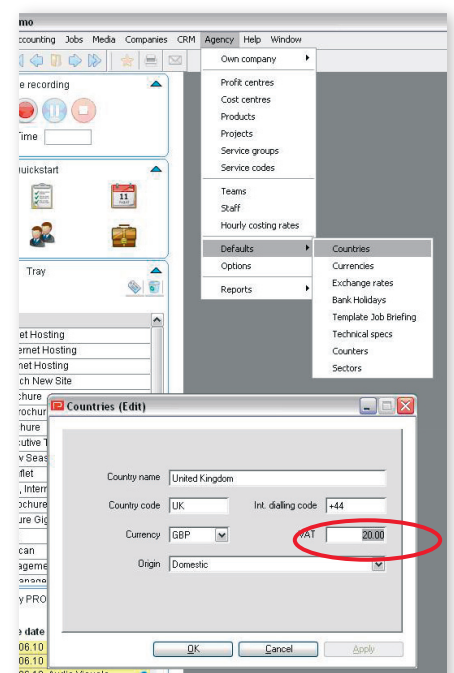
Accounting Interface

If you use the accounting interface please add new records for the 20% VAT accounts as follows:

Please got to menu Accounting/Acounting-interface/Accounts and add new records for 20% for the categories "Value added tax" and " input tax".

Country Setting

Change the standard VAT rate for country "United Kingdom".

PROAD tips and tricks

Our experience shows us daily that sometimes just little changes in the users' habits can help to work more efficiently with PROAD. We would like to outline some points which should help:
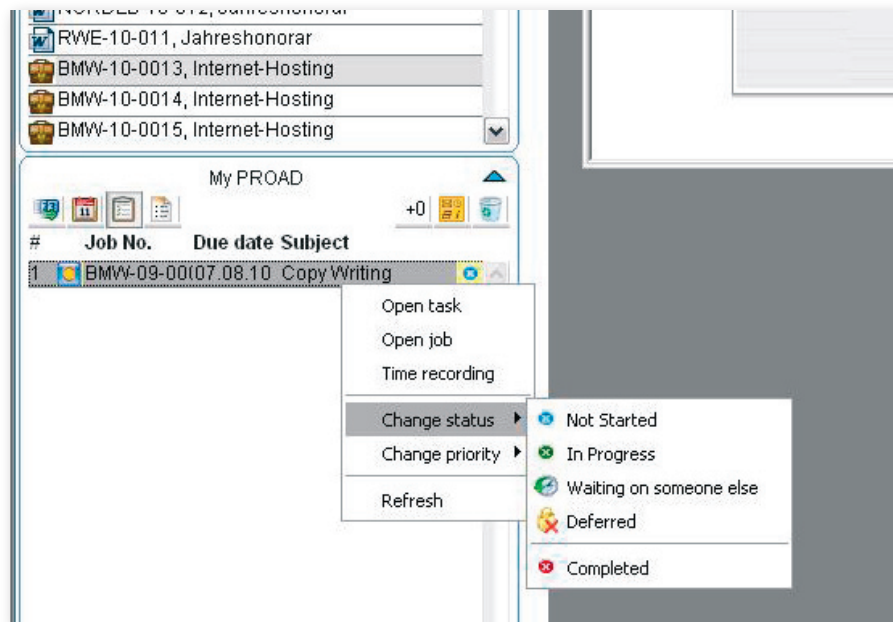
Usage of the right mouse button

In the PROAD Sidebar there are many short cuts which can be accessed by a right mouse-click.

For example you can right-click on a job in the tray area to access time recording, the company or job reporting. Also many hidden functions are available with a right-click on task in the sidebar.

Just try it!

Short cuts speed up things!

Another important aid is the dialogue browser which is available in all PROAD windows. The last search on a window is always saved in a buffer as long as a window is open. With the arrow buttons in the standard tool bar you may browse between all records in your last search.

The „save as function" (Standard toolbar, third icon from left).

This important function helps you to save a new record on the basis of an existing one. For example you may easily duplicate job data from one job to another.

Please do not hesitate to contact our customer support for further questions!
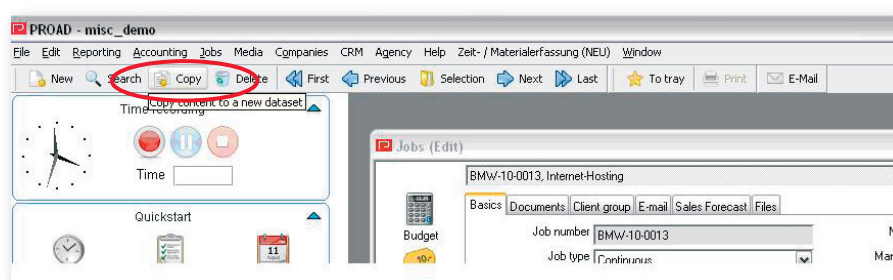
Good recommendations result in good money!

Over the past couple of years J+D Software has been setting up a successful customer referral programme.

Many of our clients have benefited from this programme by giving good recommendations to our prospects that have resulted in new business for us.

Do you know any agency which is looking for powerful and future-proof agency software? Then please recommend us because

For every successful closure we honour with **£ 500!** [1) 2) 3)]

You could possibly recommend PROAD to an acquainted or associated agency in the United Kingdom or Ireland.

Or maybe you know agencies in Germany, Austria, Switzerland, the Netherlands, United Arab Emirates or Far East?

We are expanding in these countries and already have many clients and reliable resellers.

1) If your recommendation results into a purchase order of PROAD Professional with at least five full user licences.
2) After J+D Software has received full payment. Under the precondition that there has been no prior contact to this prospect by J+D Software or its reseller.
3) Self-Marketing is excluded.