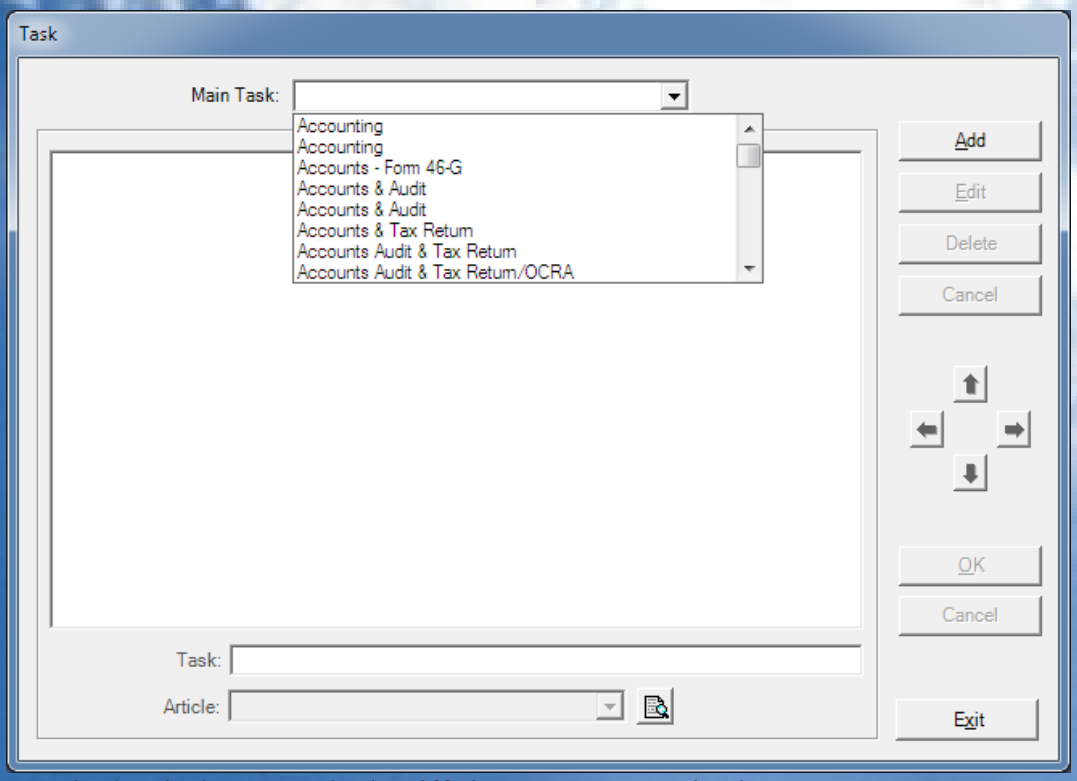
MODULE TASKS

PARAMETERS

In the parameters DMS allows the users to define standard tasks.



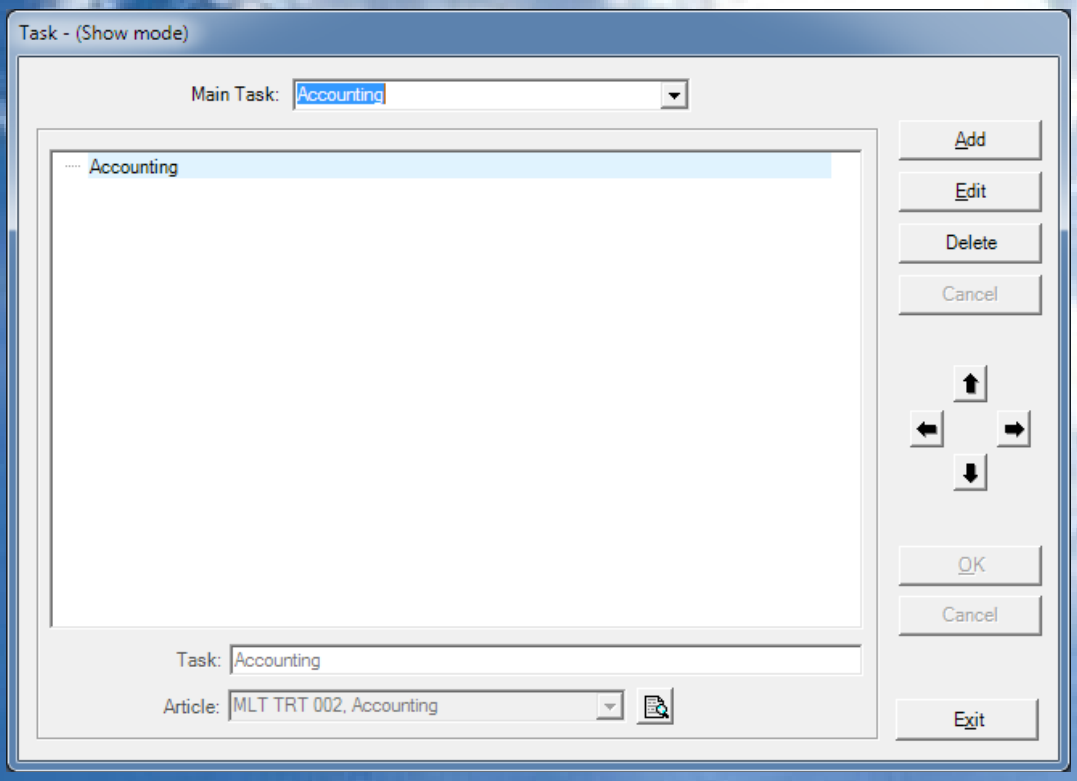
Standard tasks have standard tariffs in Portman organization.

It has been agreed that the tasks would be attached to a corresponding the article for billing purposes. In DMS the billing is done through article to which it's possible to associate standard prices.

Each time a user will select a task when raising a bill (because the task is linked to an article) there will be a fixed price.

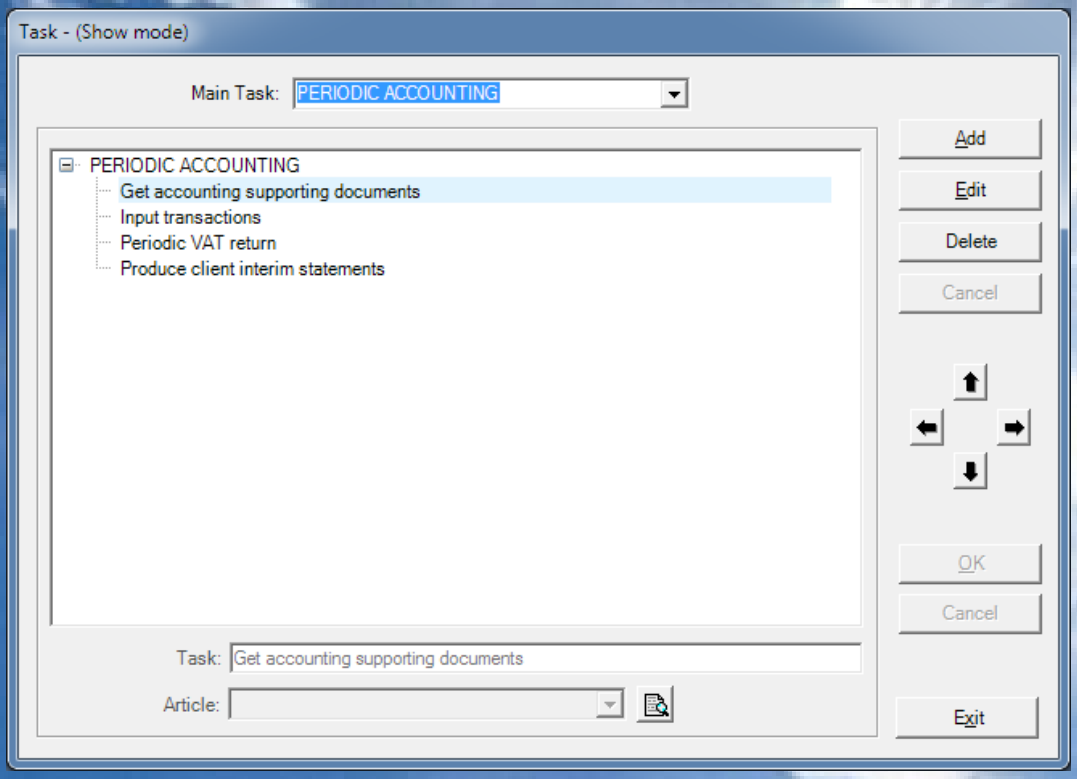
(to noted that in DMS if a task is not linked to an article the billing will be done based on the time value report on the task)

See below the link between a task and an article

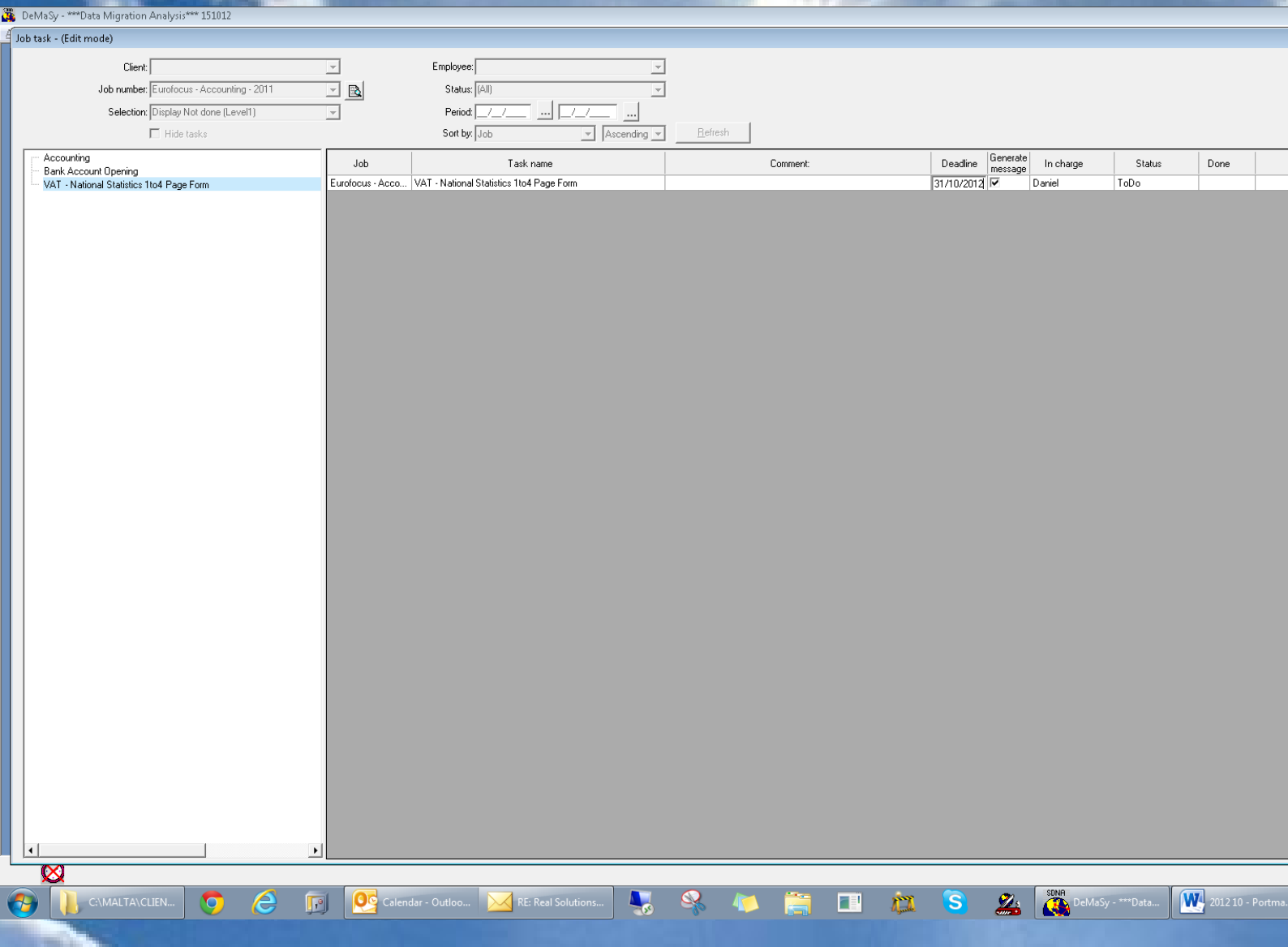


These data will be part of the migration process.
I have received a list of article with standard prices and the migration process will create both the article and the task with the same wording and create the link between both.

DMS also allows creating task and sub-tasks (see example below).
According to my understanding it's not the way tasks are going to be used by Portman.

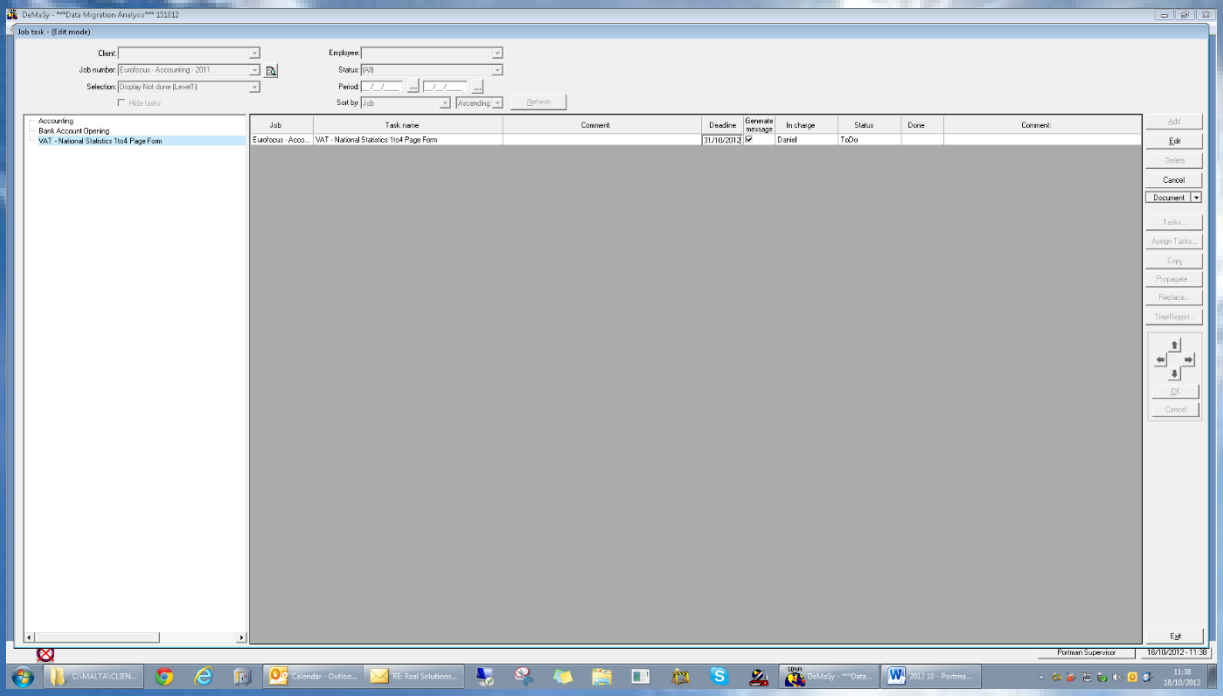


TASK MANAGEMENT MAIN SCREEN



At the top of the screen there multiple selection criteria:

- Client: Client name
- Job Number: Job number (DMS is Job driven and a task must be attached to a job)
- Selection (display all / Display all not done (level 1) / Display all not done (all levels)
- Employee: Employee responsible of the task
- Status: (To do / Pending / Done / Done but must be checked)
- Period: Selection on the task date
- Sorting criteria



BUTTONS ON RIGHT SIDE

ADD: To add a new tasks
EDIT: To modify the data of a task
DELETE: Delete a task
DOCUMENT: To attach document(s) on a task (standalone)
TASKS: To access the parameters and create new standard tasks
ASSIGN TASKS: To assign existing standard task(s) to a job
COPY: to copy a task
PROPAGATE: To propagate a responsible employee s to all levels (if applicable)
REPLACE: to replace an employee on a task in all levels (if applicable)
TIMEREPORT: To Access all the timereport attached to a task (not mandatory but allows to track down the time spent on a task and/or bill on a time spent basis.

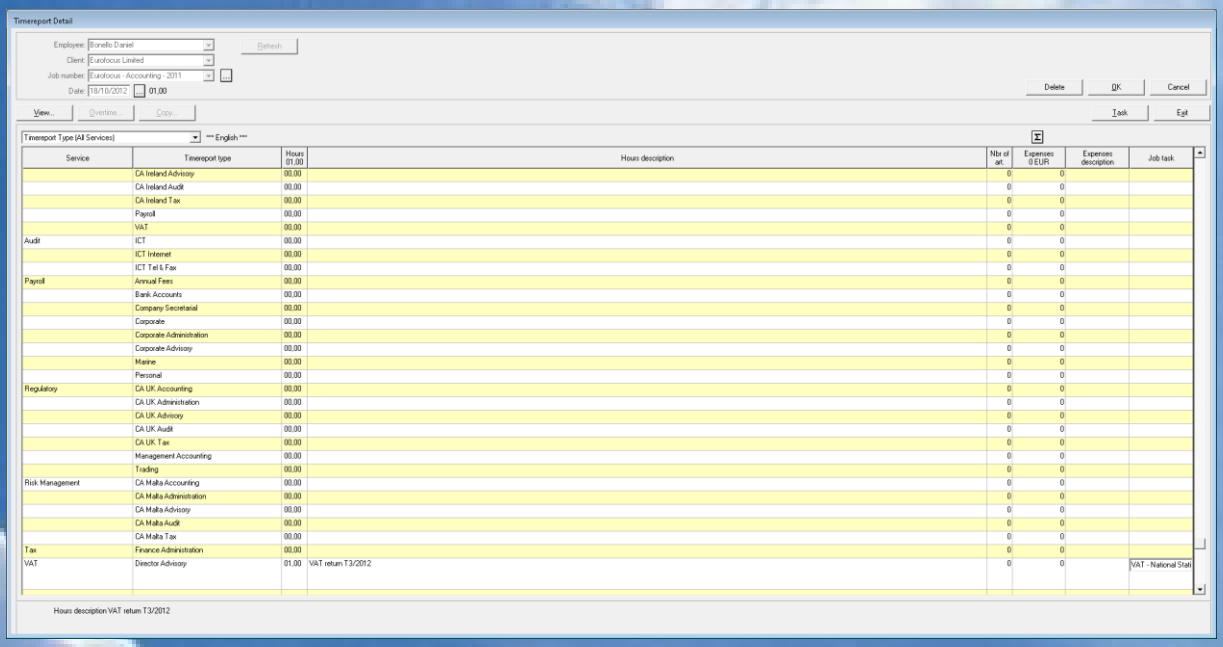
NB: arrows are done to reorganize the hierarchy of the tasks (in any)

FIELDS OF INFORMATION PART OF A TASK:

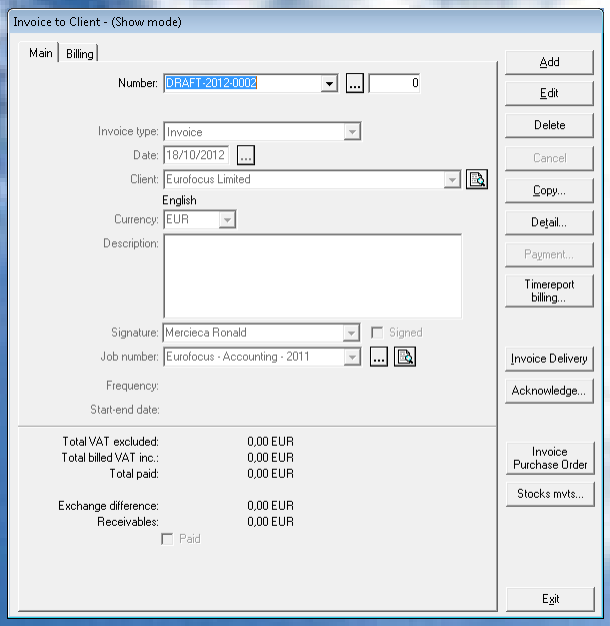
Job: Job Number
Label: Name of the task
Comment: Free narration (255 characters)
Deadline: Deadline of the task
Generate message: If checkbox is ticked a batch process will generate a reminder for task X days before due date (parameter in the options)
In Charge: Employee In charge of the task
Status: To do / Pending / Done / Done but must be checked)
Done: Employee having flagged the task as done (electronic signature)
Comment: Second free narration for the completion of the task.

TASKS AND TIMEREPORT

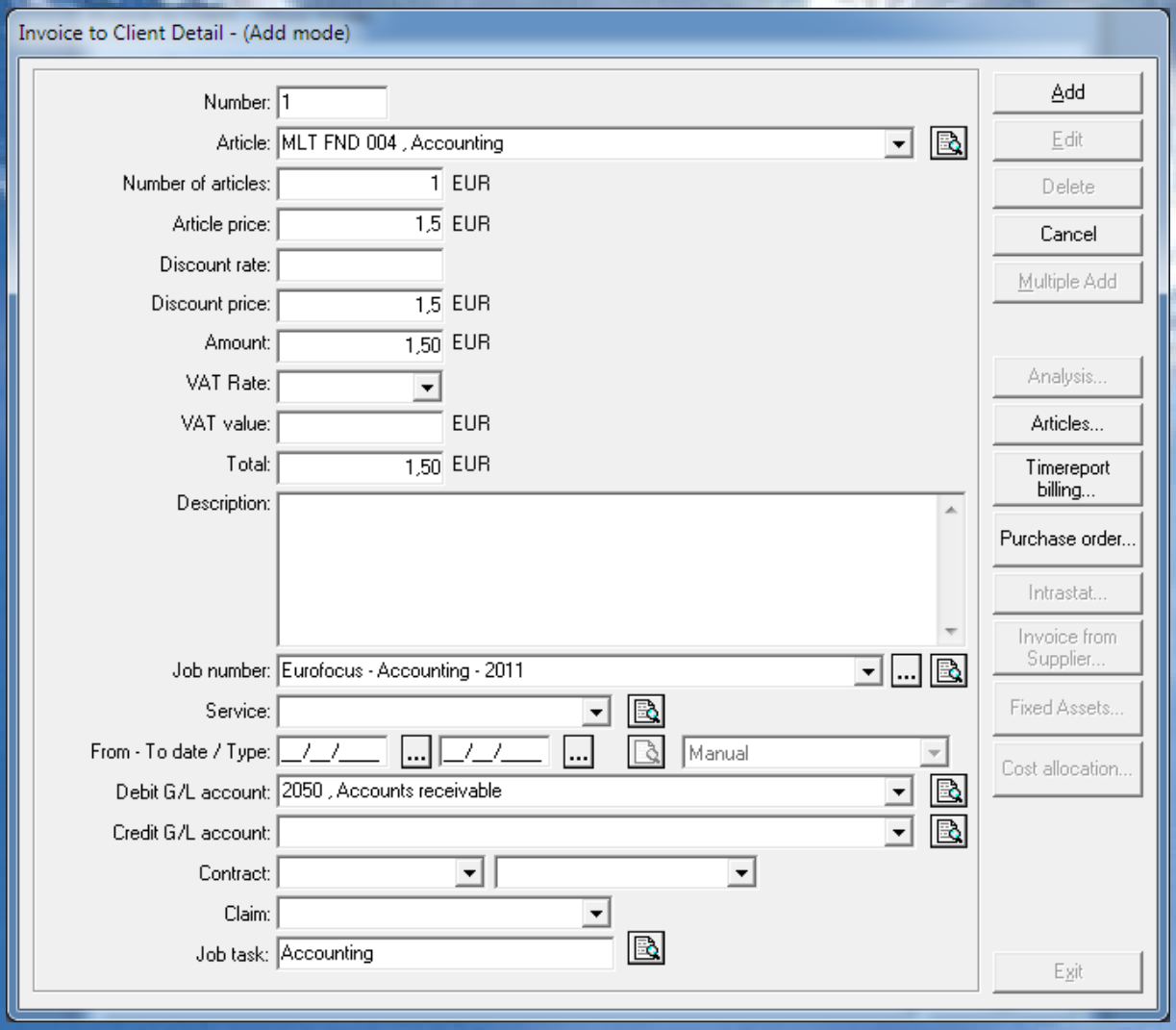
It is possible (not mandatory) to select a task when timesheeting.
This will enable analytical ledger by tasks.



TASKS BILLING



In the invoice detail the user is able to select a task on a job number and DMS will automatically fill-in the fields. The price of the task will come from the article prices (tariffs).


Invoice to Client Detail - (Add mode)
Number: 1
Article: MLT FND 004 , Accounting
Number of articles: 1 EUR
Article price: 1,5 EUR
Discount rate:
Discount price: 1,5 EUR
Amount: 1,50 EUR
VAT Rate:
VAT value: EUR
Total: 1,50 EUR
Description:
Job number: Eurofocus - Accounting - 2011
Service:
From - To date / Type: __/__/____ __/__/____ Manual
Debit G/L account: 2050 , Accounts receivable
Credit G/L account:
Contract:
Claim:
Job task: Accounting
Add
Edit
Delete
Cancel
Multiple Add
Analysis...
Articles...
Timereport billing...
Purchase order...
Intrastat...
Invoice from Supplier...
Fixed Assets...
Cost allocation...
Exit

REMINDER

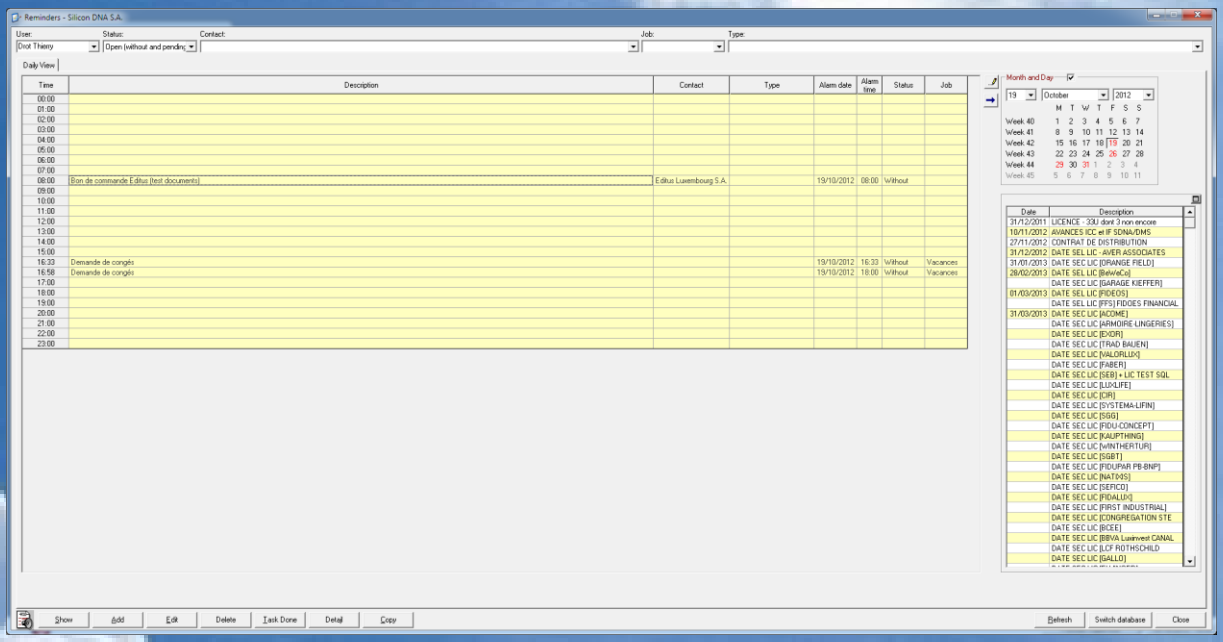
Reminder is structured like a calendar.
Reminder can be running on its own even when DMS is closed in order to pop up all the alarms setup by users.
Actually a reminder can also be considered as task (action item).

I would say that a billable action item should be defined as task because of the billing feature.
Reminder will be produced automatically based on the tasks deadlines.

If an action item is not billable it could simply be a reminder.

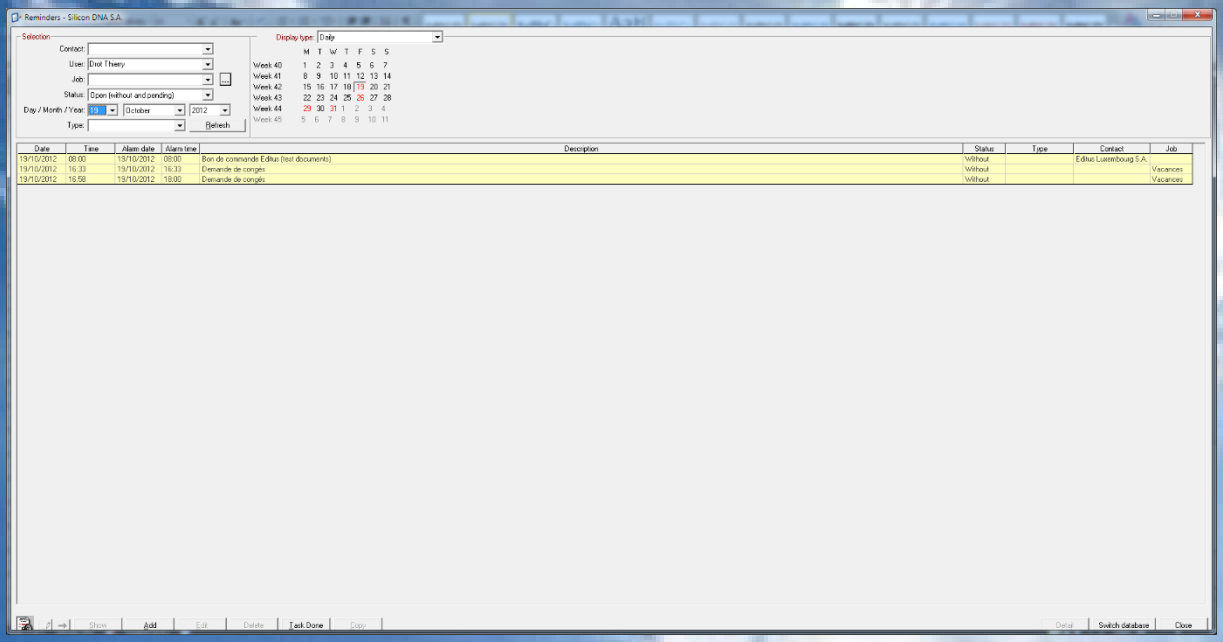
There two views (both with multiple research criteria).
The user can select a default view and swap from one to another while being in the program

View 1:

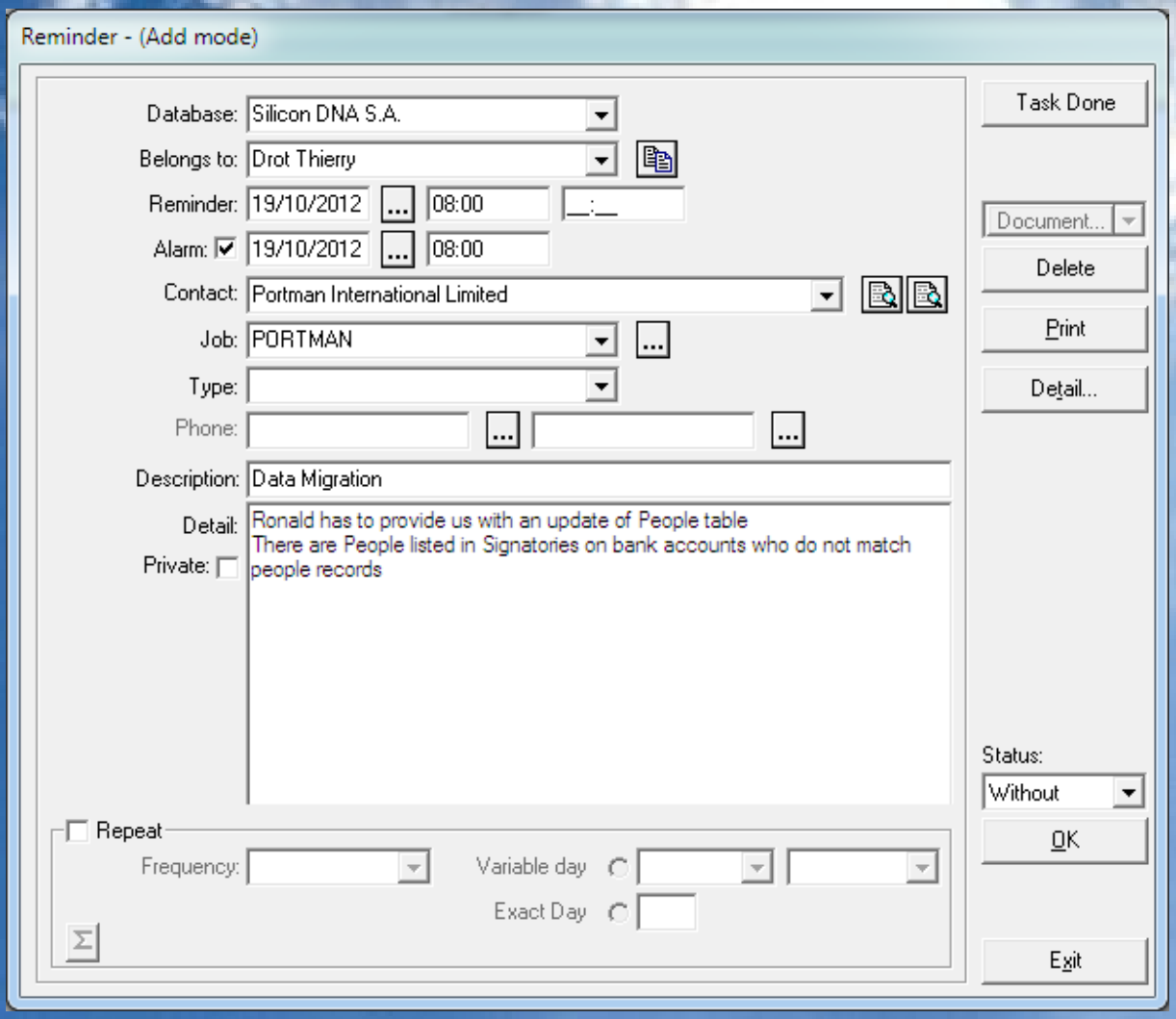


View 2

MANAGE YOUR BUSINESS WITH ONLY ONE SOFTWARE



REMINDER DETAIL



A reminder is an agenda / task with automatic reminder function.

Belongs to: Employee author of the reminder
Reminder: Date and time
Alarm: Alarm date and time
Contact: Company/person (not mandatory)
Job: Job if applicable (not mandatory)
Type: Free categorisation
Description : Free description
Detail: Unlimited memo field
Private: If the check box is ticked the reminder will not be visible to any other employee
Document: Documents can be attached to the reminders
Status: Without / Pending / Done
Repeat: Reminder can be set to automatically repeat at different periodicity.

Example of reminders:

- Meeting
- Action item (call client)
- Shareholders meeting or any corporate event on which a user has an action to take