



# WORKBOOK

## JOBS BOOK – PROJECT LIST

The screenshot displays the WorkBook software interface. At the top left, the user is identified as Ann Kimberly Schmidt. The main window is titled '1000 - Internal time 12/31/2010'. The 'Jobs' list is the central focus, showing a table of projects with columns for Customer, Job no., Job name, PM, Expenditure, Completion, and Close d. The 'Follow-up list' on the right shows various tasks and approvals, including 'Invoices for approval', 'Price estimate for approval', and 'Mass approval'. The left sidebar contains navigation options for 'Job status' and 'Customer'.

Customer	Job no.	Job name	PM	Expenditure	Completion	Close d
Mobile Solutions	902	Web banner for website	PPT	0%	17%	12/31/
Internal	1000	Internal time	JWA	0%	60%	12/31/
xNewBizz	1001	Pitch on new customer	ADM	0%	7%	12/31/
Fillipo Inc	1003	Ad for Tires.com	PPT	0%	65%	12/31/
xVacation	1004	Vacation	ADM	0%	11%	12/31/
xAbsence	1005	Holiday	ADM	0%	0%	12/31/
Fine Wineyard	1007	Catalogue 2009	ADM	0%	56%	12/31/
Furniture & More	1008	Ad for local paper	ADM	0%	28%	12/31/
Great National Park	1009	Come visit us - Radio 100	ADM	0%	93%	12/31/
Lamps or Mirrors	1010	Free light ball - campaign	ADM	0%	8%	12/31/
Mobile Solutions	1011	Get set - ready - sms - ad for SMS Weekly	ADM	0%	50%	12/31/
More Consumer Electronics	1012	Mp3 brochure	ADM	0%	14%	12/31/
Music Station Inc.	1013	Music for you ears	MMM	0%	44%	12/31/
MustHaveRecords	1014	Ad for NewsCotton	ADM	0%	0%	12/31/
New Pictures	1015	High res & low res - you decide	ADM	0%	0%	12/31/
Public Health Organization	1016	It's your health we talking about	ADM	0%	54%	12/31/

**WorkBook** is an integrated, adaptable business management system that helps you and your employees make better business decisions based on knowledge about projects and finances. WorkBook cooperates and works together with Microsoft Dynamics software, automating and streamlining business processes that help you drive your business to success.

The **'Project list'** presents all of your company's jobs with the ability to:

- View all jobs on a specific customer, on a specific project or any other way you wish
- Sort all the jobs by job close date meaning the jobs that are nearing their conclusion can be closely monitored first
- Print 1 of many management reports giving you a tremendous overview of all jobs
- Create a new job connected to an individual customer & an individual project or copy an existing job

The main page of the 'Jobs book' provides a complete view of all projects and jobs whether they are still in progress or have already been invoiced. It gives you an

overview of 'expenditure' & 'completion' percentages within an individual job creating an immediate overview of how advanced this job is. The expenditure percentage is produced by a comparison between the price estimate for this job and the current amount registered within the 'Expenditures' tab.

The Project list also presents these advantages:

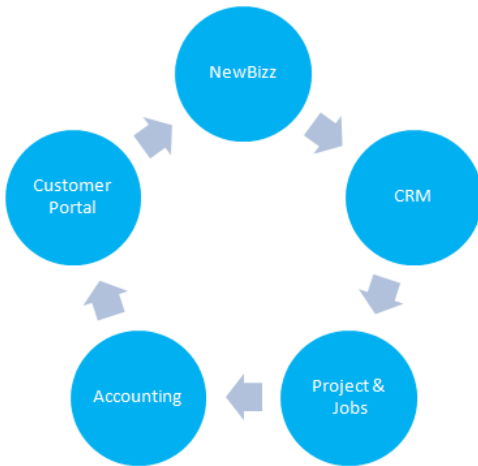
- Using the 'Job status' in the top left hand corner, it is possible to only show 'In process' jobs for example, to immediately see where your company stands
- The 'Follow-up list'. View the Follow-up list giving you a complete list of what to give priority towards
- Search for an individual job using the filter
- The Project Manager can immediately change the current job status, job close date, or project associated direct from here

<http://www.youtube.com/watch?v=-Bs87t12nlQ&hd=1>



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WorkBook can be used in the Professional Services industry with a vertical focus primarily on these sectors:

- Consultancy
- Advertising & Design
- Communication & PR
- Architects
- Digital Agencies

### Key Benefits + System Advantages

- Easily and highly scalable
- Advanced technology supports your growing business
- Supports connectivity with customers, vendors, business partners and employees
- Robust, comprehensive functionality, all-in-one system
- Supports entities across countries, sites, languages and currencies
- Customisable, Adaptable and Modular ERP system
- World leading Project Management Tools
- Always up to date with the latest Microsoft Technology

WorkBook provides a first-class web-based business system for project and resource planning. We create a fantastic day-to-day overview and ensure optimised utilisation of resources.

We know our users and we are here for our users!

Our software contains all the tools necessary for project management aimed at project driven businesses.

WorkBook is extraordinarily user friendly which makes the system highly adaptable for end users.



### About WorkBook Software A/S

WorkBook is a specialist in developing systems for project driven organisations with tight integration to business systems like Microsoft Dynamics and other Microsoft platforms. Our system handle all working related processes - from CRM and new businesses, project and resource handling, mileage allowance, expenses, time registration, document handling, invoicing, accounting and management reports.

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