Job Card & Project Tracker

An excel based solution, which is macro free, to enable you to set up, monitor and report on managed projects. If this sounds like what you need, take a look at the details below.

Set up a financial and time budget for a project

Track expenses, time spent, and project stages

Customise your project details, and set default figures

Over-ride defaults for individual projects where needed

Monitor time spent by you or staff (or sub-contractors)

Keep an up to date to-do-list

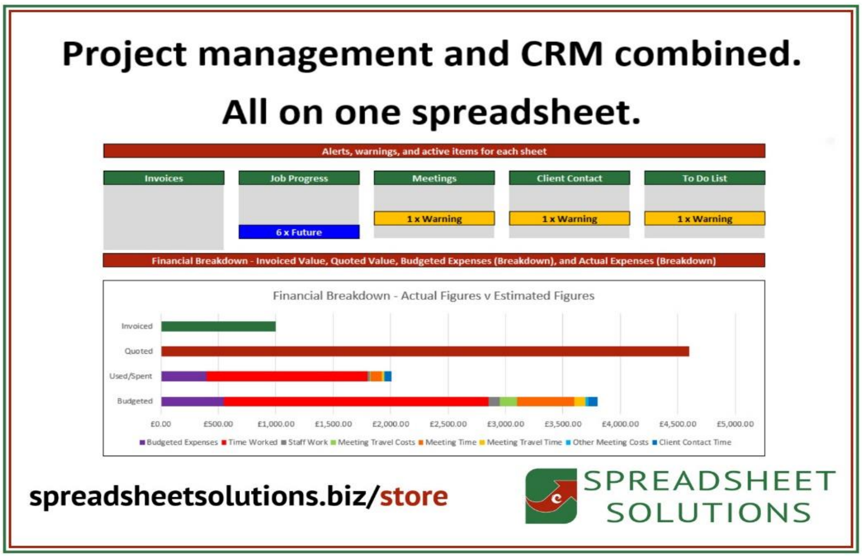
Track each stage of the project to ensure you're on track

See a dashboard with up to date information

See an automated, detailed report post project

All this on one spreadsheet!

And so much more…



Scroll down to see more about this product

Input unique Travel Types below. Do not have duplicates. Any way you may get to and from a meeting.	Assign a Cost Type to each Travel Type. Select Per Mile if it is calculated per mile, otherwise select Fixed Fee.	Input the default price per mile ONLY for those allocated to the Per Mile Cost Type.
Travel Types	**Cost Type**	**Price per Mile**
Driving	Per Mile	£1.25
Taxi/Uber	Per Mile	£3.00
Bus/Train/Tube	Fixed Fee	
Walking	Fixed Fee	

Enter as [h]:mm

Default Meeting Time	2:00

Times Used	Cost / Hour
Travel Time	£20.00
Meeting Time	£50.00

Default Hourly Rate:	£50.00
Weekend Hourly Rate:	£60.00
Bank Holiday Hourly Rate:	£80.00

Here are varios hourly rates, and price per mile for travel options (to and from meetings). You can name some travel types (don't add duplicates), and then select whether they are costed per mile, or a flat rate. If it is per mile, add the rate per mile too. The flat rate will vary per project, and is therefore on the J&C Details tab.
You can also input the default meeting time (time for the actual meeting, not including travel).
You can state your rate for the time it takes to travel to and from meetings, as well as the actual time taken to meet.
You can then set your default hourly rate, and the hourly rate for Weekends and Bank Holidays.
If you just fill in the Default Hourly Rate, and leave the rest blank, it will use the default amount for ALL hourly rates.
Complete any yellow cells.

Client Contact Rates & Action Warnings

Contact Types	Cost / Hour
Email	£30.00
Phone Call	£20.00
Skype	£30.00
Messenger	£30.00

Number of Days Warning: Meeting Dates:	3
Number of Days Warning: Client Contact Dates:	3
Number of Days Warning: Invoice Due Dates:	3
Number of Days Warning: To Do List Dates:	3

Days:	30	How many days (working days) between invoice issue and due.

Here you can name some client contact types, and then assign an hourly rate to each (leave blank to use the default hourly rate from above).
You can then also state how many days before each event, you receive a warning. Those relate to different actions, and work on working days.
You can also set how many days before an issued invoice is due.

The purpose of this spreadsheet is to help you to monitor your projects successfully. Assuming that there some consistents over all of your projects, there is a setting page where you can set default settings. This means that each time you open up a new job card, these settings are already in place, so it makes it easier to choose the default settings rather than put in all the details again. Even the settings allow you to have a default value (like for your hourly rate), and then the option to charge a different hourly rate for certain work (like meetings).

Job Details

12345 - Mr Client - Important Project

Project Start Date
Monday, 14 January 2019

Project Due Date
Monday, 25 February 2019

Please select an option

If Stages are Completed Early
Delay Until Next Stage Planned

Travel Types	Per Mile	Fixed Fee
Driving	£1.25	
Taxi/Uber	£3.00	
Bus/Train/Tube		£3.00
Walking		£0.00

To the left, please state the starting and ending date for this project. As you complete one date the other will predict, but you can over-ride either. Here are some options for travel to get to and from meetings. Complete any Fixed Fees.

Round Trip

Distance for Meetings	
10	Miles

No of Meetings	5

Excludes Travel Costs

Meeting Expenses	£25.00

The above info relates to the meetings you suspect will be required. How far away (round trip), how many, and other costs (total).

	Rates	Rates	Rates
Work Types	**Default**	**Over-Ride**	**Value Used**
Working - Week Days	£50.00		£50.00
Working - Weekends	£60.00		£60.00
Working - Holidays	£80.00		£80.00
Meetings	£50.00		£50.00
Meeting Travel	£20.00		£20.00

The green sections are the default rates. If they are correct, you need not add anything. These can be edited on the Settings tab, otherwise use the red section to change the amount only

	Time Allocation
Work Types	**Estimated Time**
Working - Week Days	40:00
Working - Weekends	5:00
Working - Holidays	0:00
Meetings	10:00
Meeting Travel	5:00

Each new project, simply open a new spreadsheet, and start the setup. The default settings will already be in place, so you can just add the project-specific details, to customise the project. There is also an opportunity to over-ride the default settings if required. If the default settings are correct, then simply leave this section blank and accept them.

By completing this sheet, you are not only setting the project up, but you are also setting allowances for the project. Like budget, time allocation, number of meetings, and various other criteria. These figures will then be compared to your actual figures as you proceed.

Quotation Calculator

Itemised List	Calculated	Over-Ride (If required)	Used Value
Budgeted Expenses	£550.00		£550.00
Time Worked	£2,300.00		£2,300.00
Staff Work	£100.00		£100.00
Meeting Time	£500.00		£500.00
Client Contact Time	£80.00		£80.00
Meeting Travel Time	£100.00		£100.00
Meeting Travel Costs	£150.00		£150.00
Other Meeting Costs	£25.00		£25.00

List additional items below

Additional Items	Calculated	Over-Ride (If required)	Used Value
	£0.00		£0.00
	£0.00		£0.00
	£0.00		£0.00

Total 'Used' Value	£3,805.00
Profit Mark Up	20.00%
Calculated Quote Value	£4,566.00

Complete red sections first, before finally the blue.

Final Quote Value
£4,600.00

The figures that you enter (combined with the defaults) will then assist you in generating a quote. You can over-ride any figure and adjust as you see fit, but if you have entered all the requirements for the project, the suggested quote will be fairly accurate.

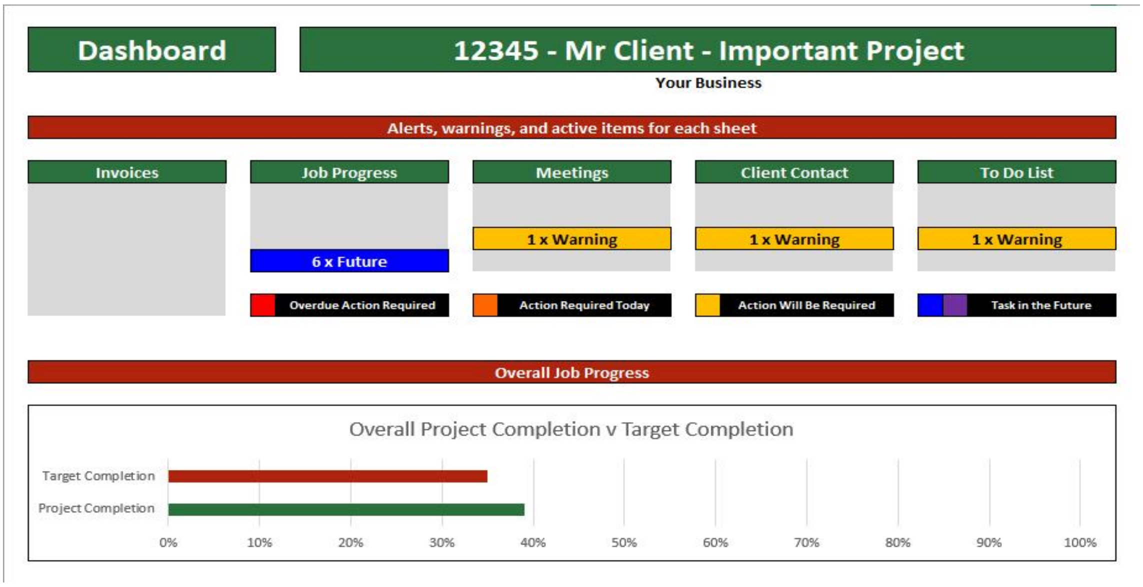
You can use this as your quote, or use another price of your choice. Simply select the calculated quote, or put in your own price. The choice is yours.

Timesheet

Use each line below to enter the details each time you work on this project. Simply add the date, the start time, the end time, and any time (between those two times) which you did not use for the projects (like breaks). If you want to exclude the time, check the blue column (see below).

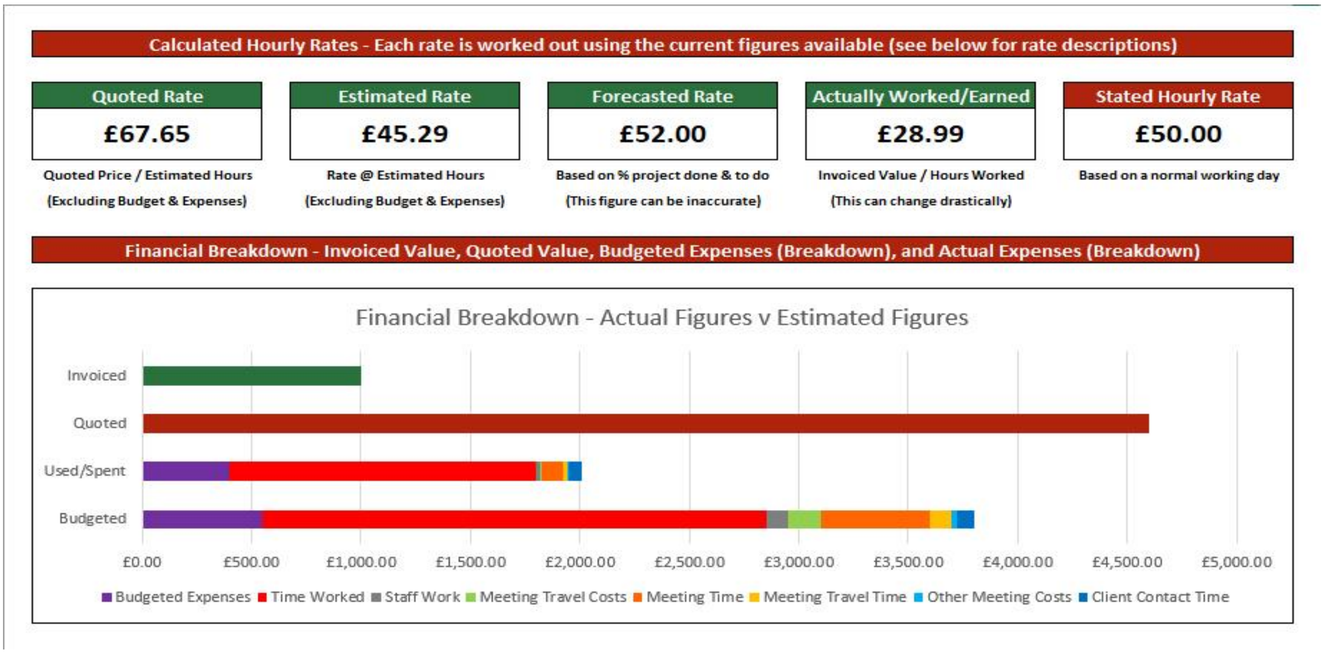
Date	Start Time	End Time	Break Time	Pro Bono Work	Time	Type
	Enter the start time of the work. Enter as hh:mm	Enter the start end of the work. Enter as hh:mm	Enter any time for breaks between the two times. Enter as [h]:mm	Check the blue column if you wish to EXCLUDE the time when working out the cost of your time spent.		
Mon, 14 Jan 2019	12:00	14:00	0:00		2:00	
Tue, 15 Jan 2019	09:00	14:00	1:00		4:00	
Wed, 16 Jan 2019	09:00	14:00	1:00		4:00	
Thu, 17 Jan 2019	09:00	14:00	1:00		4:00	
Fri, 18 Jan 2019	09:00	14:00	1:00		4:00	
Mon, 21 Jan 2019	09:00	14:00	1:00		4:00	
Tue, 22 Jan 2019	10:00	16:00	2:00		4:00	
Wed, 23 Jan 2019	12:00	14:00	0:00		2:00	

There are then 8 tabs, where you can keep up to date with your project. The tabs are as follows: **Job Progress, Expenses, Timesheet, Meetings, Staff, Client Contact, To-Do-List, and Invoices.** You can make simple updates as you proceed, and this in turn will keep you informed of upcoming requirements.



As you update details on the 8 sheets, the dashboard sheet is updated automatically. At any stage, simply click on the Dashboard tab, and see the updated information. The dashboard shows you of upcoming requirements, and also shows you your budget expense v actual expense, and your budget time v actual time.

The details on the entry pages are easy to add, and the dashboard uses those details to create a live report of your project.



Not only that, but the spreadsheet also creates a 10 page report, as a review of the project. When the project is complete, simply tick a box to state that it is complete, and the 10 page report sheet will spring into action. Each of the 8 entry pages are represented on the detailed report, so you can see exactly what has occurred during the project, perfect for making process changes or changing your future prices.

So there you have it, an overview of this unique product. We can't show you everything in this brochure, so please use the link below to the demo video, should you wish to see exactly how this product works.
All the other links you may need for more information, or to purchase this product, are below.

In order to purchase this product, download a free trial, or watch the demo video, please click the image to the left.

This product is sold from the UK, and will be invoiced as GBP. The fee is a once off fee, and there is no monthly charge. There will be an entirely optional annual charge, should you want to receive future upgrades.

£480

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