



# TrakDate

Task Monitoring and Due Date Tracking



## From CLI - the Time & Billing Specialists

- **Quick Setup** — task group codes allow automatic creation of up to six recurring tasks based upon type and location of entity
- **Automatic Due Date/Extension Calculations** — based on fiscal year of entity.
- **Easy check-off of completed steps** — on either the project task screen or the incomplete tasks screen. Automatic insertion of user ID and date.
- **Multiple Step Templates** — user defined templates - you define your work flow process.
- **Incomplete tasks grid** — can be organized, sorted and sub-totaled by "drag and drop" on column headings, and dragged into Excel.
- **Data access control** — limit display to specific tasks, templates or managers.
- **Recurring, current, ad hoc, and completed tasks** — shown on the same screen for each client/project.
- **Fully integrated** — uses PowerPM clients and projects - no data duplication.

The screenshot shows the 'Task Update' window with the following settings:

- Selection by: Client ID
- Office selection: All Offices
- Project Tasks: All Tasks
- Client ID or Alpha Sort: Client ID
- Task: Any Task
- Template: Any Template
- Tasks: 20
- Management: Any Staff
- AFS - Smith, Alfred F.
- Office: All Offices
- Due Date: from 3/15/2004 to 4/15/2004
- Show Tasks with: Last Completed Step
- in the Range: from Step-0 to Step-5
- Display Options: Incomplete Tasks
- Export Mode: [ ]
- Counts: Total Count Only

Due Date	Task	Client Name	Last Step	Step Date	Step SID	Partner	TaxPrep	Year	Ext	Client	T
3/15/2004	1120	Denton Fender Auto Body	2-To preparation	3/2/2004	PEG	WIN	PEG	2003	0	15000	T/
		Mayken Doors and Windows	3-To assembly	3/11/2004	HHM	CLI	DEW	2003	0	21000	T/
		National Insurance Company	0-Not Started			WIN	HHM	2003	0	23000	T/
		Pacific Records	3-To assembly	3/10/2004	CLI	WIN	EMM	2003	0	12000	T/
		Perfect Office Products	0-Not Started			CLI		2003	0	22000	T/
	NY-CT3	Denton Fender Auto Body	2-To preparation	3/4/2004	EMM	WIN	PEG	2003	0	15000	T/
		Mayken Doors and Windows	3-To assembly	3/11/2004	CLI	CLI	DEW	2003	0	21000	T/
		National Insurance Company	5-To mail			WIN	HHM	2003	0	23000	T/
		Pacific Records	0-Not Started			WIN	EMM	2003	0	12000	T/
		Perfect Office Products	0-Not Started			CLI		2003	0	22000	T/
4/15/2004	1040	Fresh Painters	4-To signature	3/12/2004	CLI	WIN	HHM	2003	0	16000	T/
		Marion Haste	2-To preparation	4/27/2004	DEW	SAS	DEW	2003	0	20000	T/

Price: \$50 per timekeeper

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