

# Preview WebTCards Standard Business Accounting Accounts Production Tracking System

## Screen shots and how to create your own Tracking System in 2 easy steps

For help with the design and set-up of your system e-mail  
[Support@WebTCards.com](mailto:Support@WebTCards.com) or call UK (044) (0) 7717-653177



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# Sample Standard WebTCards Accounts Tracking System

Your Company logo here

Accountancy : Accounts Production System

[Change Pwd](#) | [Support](#) | [LOG OUT](#)

Boards : Accounts Production System
Keep track of Clients Books

DESIGN BOARD | CREATE T-CARD | BATCH CARDS | FIND | SUMMARISE | EXPORT | REFRESH | LICENCE SOFTWARE

Board view, visitor 19 | [Filter Board](#) | [Key Indicator View](#)

Work Received 6 TCards	Awaiting Information 0 TCards	A. Holland - Books In 0 TCards	A. Holland - In Progress 1 TCards	A. Holland - With Partner 0 TCards	D. Martin - Books In 1 TCards	D. Martin - In Progress 0 TCards	D. Martin - With Partner 0 TCards	A. Graham 0 T
<div style="background-color: #008000; color: white; padding: 2px; margin-bottom: 5px;">                     ↻ Four Oaks Ltd                      ↻ 01-Jan-2009                      ↻ Limited Company                 </div> <div style="background-color: #008000; color: white; padding: 2px; margin-bottom: 5px;">                     ↻ Bright Fields                      ↻ 31-Mar-2009                      ↻ Limited Company                 </div> <div style="background-color: #008000; color: white; padding: 2px; margin-bottom: 5px;">                     ↻ Dunbar Ltd.                      ↻ 31-Mar-2009                      ↻ Limited Company                 </div> <div style="background-color: #FF8C00; color: white; padding: 2px; margin-bottom: 5px;">                     ↻ TimeTree Ltd.                      ↻ 01-Apr-2009                      ↻ Dormant Company                 </div> <div style="background-color: #0000FF; color: white; padding: 2px; margin-bottom: 5px;">                     ↻ Vila Plein                      ↻ 05-Apr-2009                      ↻ Unincorporated Accou                 </div> <div style="background-color: #0000FF; color: white; padding: 2px;">                     ↻ Cole Esq.                      ↻ 01-Jul-2009                      ↻ Unincorporated Accou                 </div>			<div style="background-color: #FF8C00; color: white; padding: 2px;">                     ↻ Deloitte &amp; Touche Pr                      ↻ 05-Apr-2009                      ↻ Dormant Company                 </div>			<div style="background-color: #0000FF; color: white; padding: 2px;">                     ↻ Chelsea Manor                      ↻ 05-May-2009                      ↻ Unincorporated Accou                 </div>		

# Sample WebTCards Production Planning T Card

Created By: Accountancy on 14/03/2009 11:11, Modified By: Accountancy on 28/10/2009 11:56

Board : Accounts Production System

T-Card Template : Accounts Job Card  All

Panel : Work Received

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\*Client : Bright Fields

Date Books Requested : 31-Mar-2009

\*Type of Books : Limited Company

Contact : Graham

Telephone : 0207-991-4061

Address : 5 Astons Road, Moor Park

Note pad :

Books Requested :

Books Received :

Books Complete :

Clerk in charge :

Pre-start meeting :

Job started :

Save & Close Save & Add New Save & Copy Delete Cancel Print

[Click here to e-mail this TCard](#)

Each T Card records a Task

# Step 1 Design your Board and Panels

WebTCards.com

**Board and Panel Creation**

**Board Details (Tip : A Board normally represents a Process)**

Board Name :

Board Description :

Board Colour :  Panel Colour :

[View Audit](#)

**Panels (Tip : Each Panel represents a step in the Process)**

Panel Name	Sequence	Delete
<input type="text" value="Work Received"/>	<input type="text" value="1"/>	<input type="button" value="Delete"/>
<input type="text" value="Awaiting Information"/>	<input type="text" value="2"/>	<input type="button" value="Delete"/>
<input type="text" value="A. Holland - Books In"/>	<input type="text" value="3"/>	<input type="button" value="Delete"/>
<input type="text" value="A. Holland - In Progress"/>	<input type="text" value="4"/>	<input type="button" value="Delete"/>
<input type="text" value="A. Holland - With Partner"/>	<input type="text" value="5"/>	<input type="button" value="Delete"/>
<input type="text" value="D. Martin - Books In"/>	<input type="text" value="6"/>	<input type="button" value="Delete"/>
<input type="text" value="D. Martin - In Progress"/>	<input type="text" value="7"/>	<input type="button" value="Delete"/>
<input type="text" value="D. Martin - With Partner"/>	<input type="text" value="8"/>	<input type="button" value="Delete"/>

A Board represents your Business Process and the Panels the Steps in that Process.

To design a system for your business, login/register for the [free 21 day trial](#), then click Design Board and Create Board and Panels.



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# Step 2 Design your T Card Template

WebTCards.com

T-Card Template Creation - Design your blank T-Card

T-Card Template Details (Tip : Choose a Name which describes the information you will type onto each card)

Template Name :  Mail Queries to :

Template Colour :  ... Default Board :

Board Colour :  Panel Colour :

[View Audit](#)

Design your T-Card (Tip: Type a Label Name for each line of information you will record e.g.'Name', 'Quantity'etc)

Seq	Label Name	Description	Data Type	Max Char	Mandatory	Header	Delete
1	<input type="text" value="Client"/>	<input type="text" value="Client"/>	<input type="text" value="Text"/>	<input type="text" value="50"/>	<input checked="" type="checkbox"/>	<input type="text" value="1"/>	<input type="button" value="X"/>
2	<input type="text" value="Date Books Requested"/>	<input type="text" value="Date Books Requested"/>	<input type="text" value="Date/Time"/>		<input type="checkbox"/>	<input type="text" value="2"/>	<input type="button" value="X"/>
3	<input type="text" value="Type of Books"/>	<input type="text" value="Type of work"/>	<input type="text" value="List"/>	<input type="button" value="Edit"/>	<input checked="" type="checkbox"/>	<input type="text" value="3"/>	<input type="button" value="X"/>
4	<input type="text" value="Contact"/>	<input type="text" value="Contact"/>	<input type="text" value="Text"/>	<input type="text" value="50"/>	<input type="checkbox"/>	<input type="text"/>	<input type="button" value="X"/>
5	<input type="text" value="Telephone"/>	<input type="text" value="Telephone"/>	<input type="text" value="Text"/>	<input type="text" value="15"/>	<input type="checkbox"/>	<input type="text"/>	<input type="button" value="X"/>
6	<input type="text" value="Address"/>	<input type="text" value="Address"/>	<input type="text" value="Text"/>	<input type="text" value="200"/>	<input type="checkbox"/>	<input type="text"/>	<input type="button" value="X"/>
7	<input type="text" value="Note pad"/>	<input type="text" value="Note pad"/>	<input type="text" value="Text"/>	<input type="text" value="750"/>	<input type="checkbox"/>	<input type="text"/>	<input type="button" value="X"/>
8	<input type="text" value="Books Requested"/>	<input type="text" value="Books Requested"/>	<input type="text" value="Date/Time"/>		<input type="checkbox"/>	<input type="text"/>	<input type="button" value="X"/>

Each T Card records a Task, before you can create your T Cards you must design a T Card Template – a list of the information you want recorded on each T Card

To design a T Card click Design Board and Create Template. Each T Card can have up to 40 lines.



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# Congratulations you have a fully working WebTCards system

- Now try some of our advanced features
  - To sort the T Cards automatically on your Board or to allow others to access your Board securely, click design Board and then Advanced Options
- See what you can do with your WebTCards System
  - Set your T Card colour to change automatically using the T Card Template List data type
  - Filter Board
  - Find T Cards
  - e-mail T Card
  - Graphical summaries with Key Performance Indicators
  - And so much more

