What's New in eFrontOffice Interface – Project Accounting?

Version 5.13

Please Note: The features listed here, are enhancements and additions made to eFrontOffice-PA Interface since version 5.10.

Organization Client Details

1. Display Debtor Code.
2. Complete button added to Task Tab. Completes Task in PA

Track Proposals & Inconsistent Links

1. Unlinked Opportunities Tab screen added. Displays all Opportunities that are not linked to a project. Add and Associate button are available to users.

Version 5.10

Please Note: The features listed here, are enhancements and additions made to eFrontOffice-PA Interface since version 5.0.

Project Accounting Integration Options Screen

1: Under new menu structure of Configure

2: Screen split into 4 Tabs (Lead/Opportunity, Quotes/Service Agreements, Triggers/Indexes and Calls)

3: New System Options for Call Integration and Default Project Status's

Organization Client Details

1: New Integration Status information on screen.

2: Tasks Tab displaying all PA Task linked to eFO Calls

3: New Update Tab for updating PA client information.

Project Integration (Service Agreements/Quotes/Opportunities)

1: New Integration Status information on screen.

2: Change Status list box.

Project Accounting Budgets (Quotes)

1: Added functionality for deleting budget line that already exist.

Calls

1: PA Tasks created from eFO Call info and association.

2: WEB TimeRecorder lines created from Call Events.