What's New in Acowin Version 4.40?

Dispatch Board Posted Status Indicator: The dispatch status indicator will now change to a green "P" when a Call Slip is posted to Accounts Receivable. This lets you see which Call Slips have been fully billed out and posted. The dispatch status indicator is the second small box beneath each Call Slip on the Dispatch Board. The list of possible colors and codes now includes:

>Blue "O" = Open or Incomplete call
>Green "D" = Dispatched time entered, technician is en route to site
>Yellow "A" = Arrived time entered, technician is now on site, working on the call
>Grey "C" = Departed time entered, labor is complete
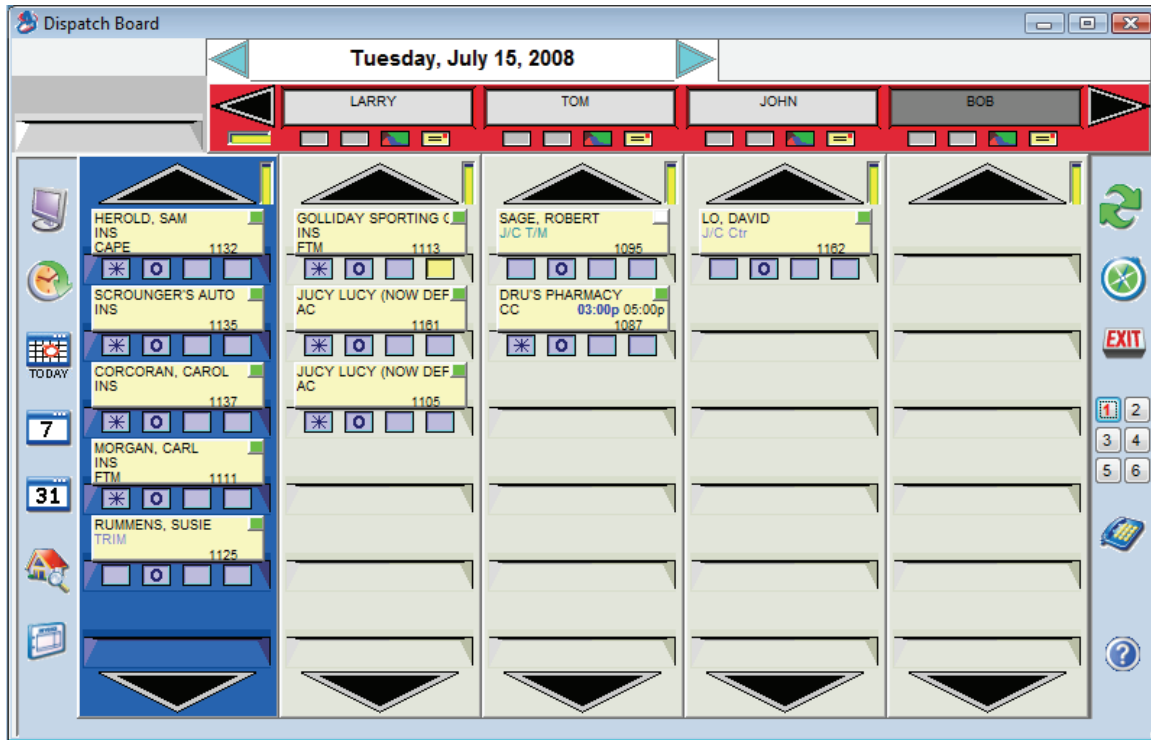>Green "P" = Call Slip has been invoiced and posted to A/R

Technician Leave Time: Acowin version 4.40 introduces the Technician Leave system, an option in the Employee File that lets you designate a technician as "away from work" for a period of time. To put a tech on leave, click the Leave button in the Employee File. Use the fields on the left side of the screen to set the Start and End Date, and use the "Include Weekends" check box to indicate whether the technician's Leave time should include any weekends that happen to fall within the date range. Click Add to put the Leave time into effect. The right side of the screen lists any Leave time currently in effect, with a pull-down menu to view Current, Past, or All of the technician's Leave. You can use the Remove button at the bottom of the screen to cancel a Leave at any time.

This is the Leave setup screen, accessed by clicking the Leave button in the Employee File.

As long as the technician is on Leave, his name will be darkened on the Dispatch Board, and the system will NOT allow you to place any Call Slips in his column. The tech's column returns to normal when his Leave ends, or is removed. You can use this system

to make your techs unavailable when they're on vacation, out sick, or away from the office for any other reason.

The column for Bob has been darkened, because Bob is on Leave. No calls can be placed in his column until his Leave ends, or is canceled.

Copying Jobs: When you create a new Job in the Project Management file, you will now have the option to copy the Phase list, and detailed Phase estimates, from an existing Job. The Phase detail from Extras may also be included, and you can limit the estimate detail to only Materials, Labor, or Miscellaneous costs – or you can copy the entire detailed estimate from the existing Job, including all labor, materials, and miscellaneous costs estimated for all Phases. There is also an option to bring over the billing Customer from the original Job, or you can use the Customer who normally pays the bills for the new Job's work site. This new feature should greatly speed up Job creation. You could even create some Job Estimates that serve as "templates", providing standard Phases and detailed lists of labor and materials for new Jobs. You are always free to revise the Phase list and Estimates for a new Job, after you have created it.

This screen will appear when you create a new Job. This example shows how to select an existing Job and copy its Phases, with their detailed estimates, into the new Job.

Interface with ACORATE – Flat Rate Made Easy!: The Import Flat Rate program now includes an option to import Flat Rate price books from the new ACORATE – Flat Rate Made Easy! system. ACORATE provides a simple but powerful environment to create and update Flat Rate price books, allowing you to change all aspects of a repair code from a single screen. If you haven't switched to ACORATE for managing your Flat Rate prices yet, please contact your Team Management Systems sales representative for more details.

New Reports: Acowin version 4.40 includes four new reports, listed here with their location in the Reports menu:

      Flat Rate Tech Spiff Report (Reports / Call Slip) – this report tracks incentive or commission payments, known as "Spiff" payments, for each technician. Spiff amounts are drawn from Flat Rate price codes created by ACORATE, the new Flat Rate pricing solution from Team Management Systems. If you are using ACORATE and have chosen to include Spiff payments with your Flat Rate repair codes, you can run the Flat Rate Tech Spiff report each pay period, to obtain the total Spiff amount owed to each technician.

      Flat Rate Spiff Detail (Reports / Call Slip) – this report analyzes the profitability of every Flat Rate invoice that included a Spiff payment to a technician. The estimated costs from the Flat Rate billing codes are compared to the actual costs from the completed Call Slip.

      Flat Rate Evaluation Report (Reports / Call Slip) - This report helps you compare the actual performance of your technicians to the estimated labor hours included in your Flat Rate billing codes. Each Call Slip is listed on the report with its total Estimated Hours from the Flat Rate codes, plus its total Actual Hours from the Times screen. If the Actual Hours frequently exceed Estimated Hours, perhaps your Estimated

Hours are not realistic, or your technicians require additional training to complete the repairs within the allotted time.

Distribution Profitability Report (Reports / Call Slip) - This report provides a concise summary of the profitability for each Distribution Code. Since Distribution Codes represent departments within your company, and are usually tied to QuickBooks Classes with similar names, this gives you a departmental profitability report. For each Distribution Code, you will be given total revenue, total cost, gross profit, the number of invoices posted during the report period, and the average invoice amount (total income divided by number of invoices.) The percentage of total sales and overall profit represented by each Distribution Code is also presented, helping you to determine which departments generate the most revenue and profit.

New Inventory Price List Options: The Inventory Price List, found in the Inventory section of the Reports menu, can now be run to compare Average Unit Cost, Last Unit Cost, and List Cost. You can use the report to locate items where any or all of these conditions is true:

Average Cost > List Cost = the item's Average Unit Cost is higher than the List Cost, which is used to calculate a sale price. You should consider raising the List Cost on such items.

Last Unit Cost > List Cost = the last price you paid for the item is higher than its List Cost. If this is a permanent price increase, and not just a temporary price spike, you might want to raise the List Cost.

List Cost > Sell Price = the item has a fixed unit Sell Price that is lower than its List Cost. This would strongly suggest that the Sell Price is set to an artificially low level.

Improved Purchase Order Data Entry: The Purchase Order screen has been enhanced to allow faster data entry. When you're filling in the list of parts to order, and your cursor has reached the List Cost column, you can touch ENTER to add a new line. Your cursor will move into the Key Code field at the beginning of the new line, ready for you to enter a Key Code for the new item. In the past, it was necessary to click the New button to add each new line, but now you can touch ENTER to move through the Quantity, List Cost, and Actual Cost fields, then create a new line and continue listing the parts you wish to order.

New Attachment Options: The Attachments feature has been added to Purchase Orders, the Vendor File, the Inventory File, Receiving Slips, and Vendor Bills. You may now attach images, documents, spreadsheets, and files from other programs to these parts of the Acowin system.

Inventory List Costs and Sell Prices: If you change the List Cost for an Inventory item, and that item has a fixed Sale Price on the Stock Count screen, the system will ask if you want to keep the Markup the same and change the Sell Price, or keep the Sell Price the same and change the Markup.

Acowin

This item has a set sell price. Do you want to recalculate the sell price based on Manual Markup? Answering No will keep the current sell price and calculate a new Manual Markup

Yes   No