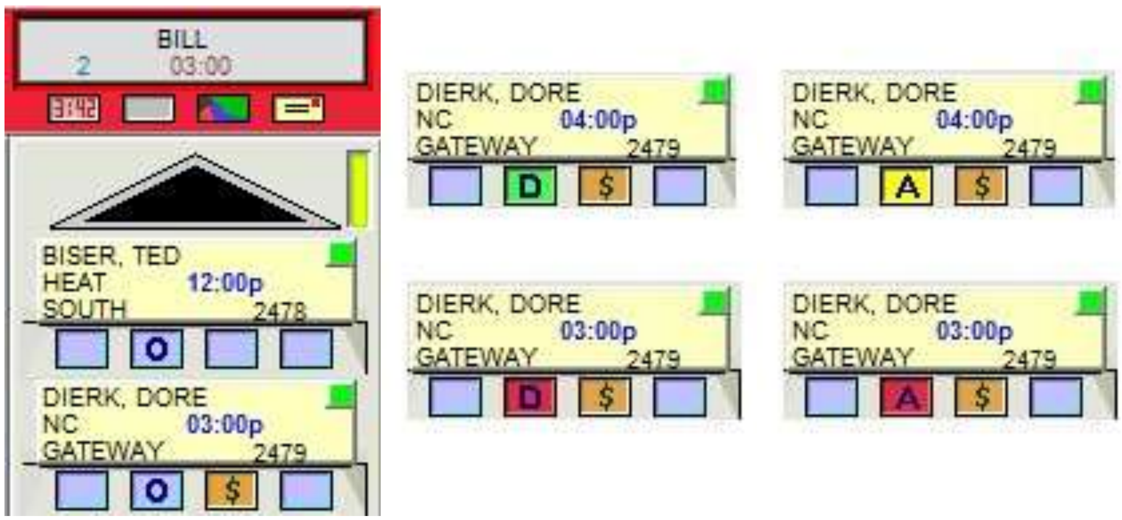
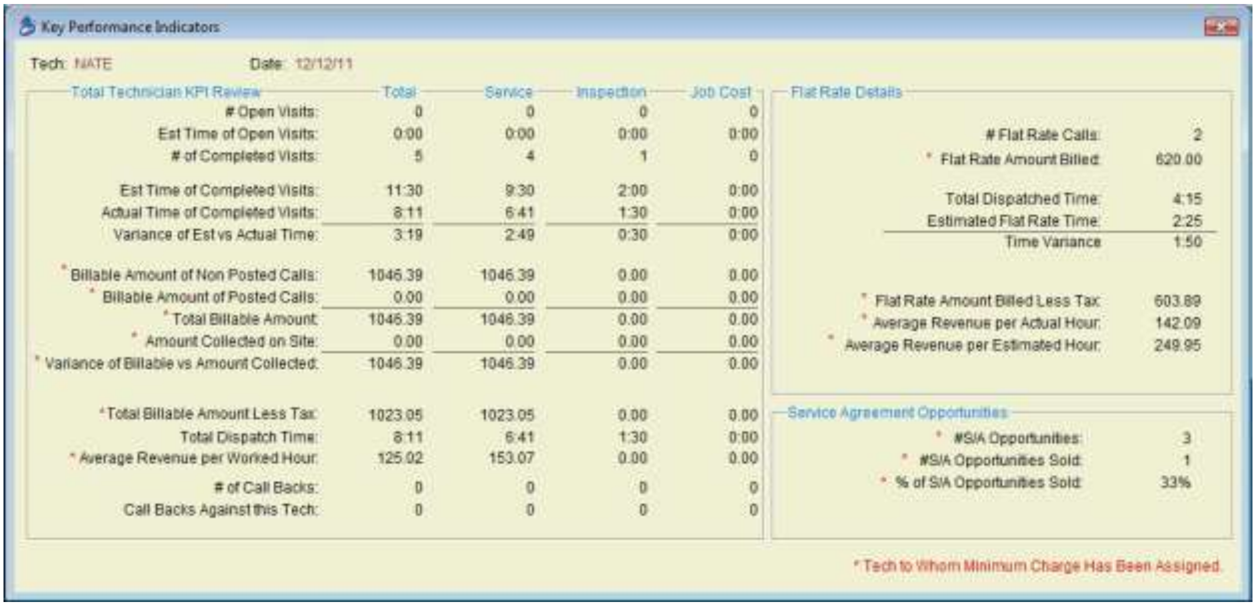
What's New In Acowin 4.92?

Number of Scheduled Calls and Estimated Hours: At the top of each technician's column, you will now see the number of scheduled calls the tech has as well as the estimated number of hours the calls should take. The estimated time at the top of the techs column will decrease based on the amount of time that a tech has been on a call until the time has been exceeded for the call. At that piont in time, the dispatch status will change from a Green (D - Dispatched) or Yellow (A - Arrived) background to a Red background.



Green Schedule Card on Dispatch Board - If a call slip has been scheduled for more than one technician, date or time, the color of the card on the dispatch board will now be light green. This instantly alerts the dispatcher that there is more than one visit associated with the call slip.

Technician KPIs - Technician Key Performance Indicators have been added to the dispatch board by simply right clicking the technician's name at the top of the column and clicking the KPI button. The Technician Key Performance Indicators measure how the technician is performing in various areas and gives important information such as estimated vs. actual time on calls, how much has been billed vs. how much has been collected, average revenue per hour, how the estimated flat rate hours compare to actual dispatch hours, how many service agreement opportunities the technician had, their service agreement closing rate, how many call backs against the technician, and more.



Happy Calls: Happy Call Tracking has been added to the system and can be accessed directly from the dispatch board. This incredible feature allows your CSR's to read from a pre-defined script and enter your customer's answers from a list of questions defined by your company. A Happy Call Report can be generated to show you the percentage of positive and negative responses for each of the "Happy Call" questions. A visual indication on the Dispatch Board will indicate if the "Happy Call" needs a follow up. The visual indications include a Green happy face that indicates a "Happy Call" was placed and the questions were answered with no need for future follow up. A Yellow face indicates that a "Happy Call" was attempted but the CSR was unable to contact the customer. A Red "X" indicates that the customer refused to answer the "Happy Call" questions. And an orange face indicates that the "Happy Call" was placed and that the customer would like a follow up call, typically from a manager.

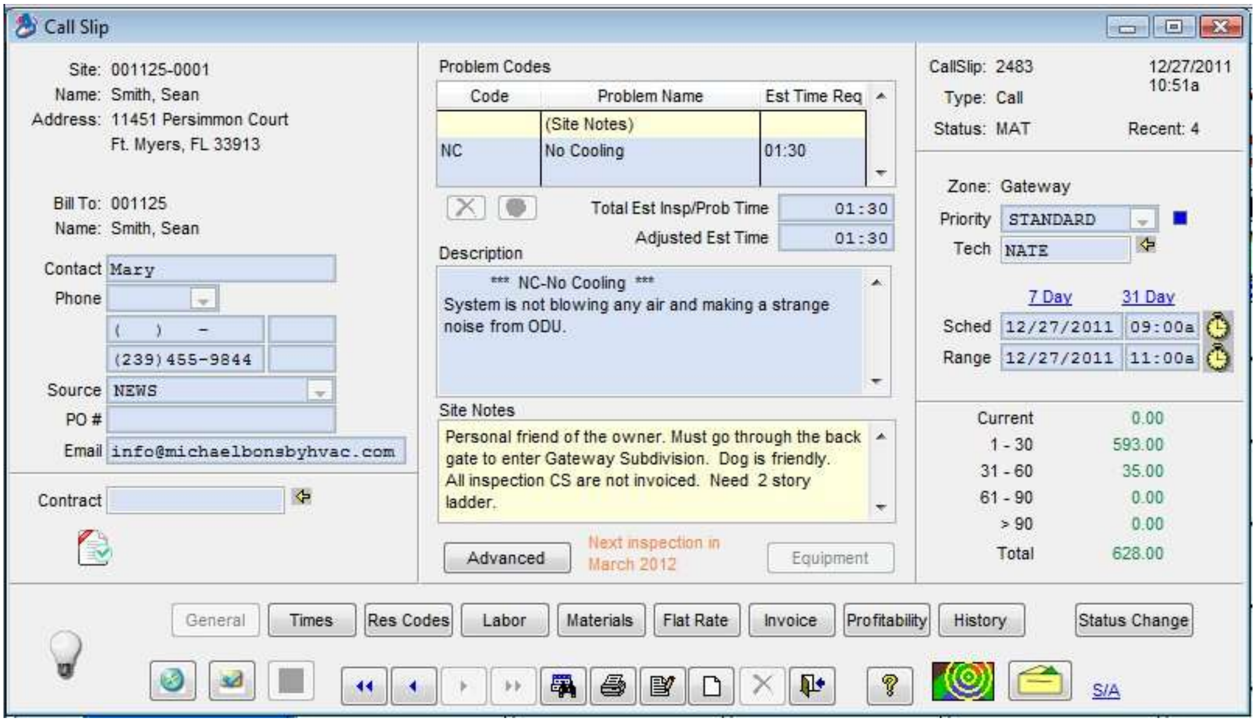
Green happy face indicates a “Happy Call” was placed and the questions were answered with no need for future follow up.

Yellow face indicates that a “Happy Call” was attempted but the CSR was unable to contact the customer.

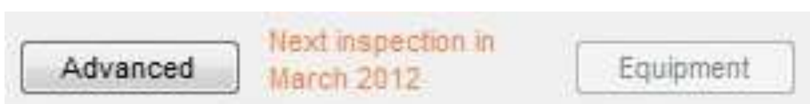
Red “X” indicates that the customer refused to answer the “Happy Call” questions.

Orange face indicates that the “Happy Call” was placed and that the customer would like a follow up call, typically from a manager.

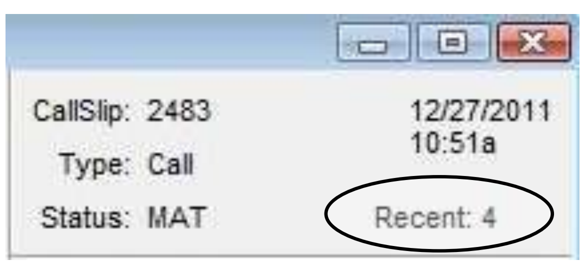
Call Slip Screen – Several exciting new features have been added to the Call Slip Screen giving the CSR even more valuable information instantly when taking a new service call.



Month & Year of Next Inspection - Directly below the Site Notes / Things to Check section, the call slip will now display when the next inspection should take place. If the inspection is close, then the dispatcher can decide if they want to generate the inspection slip so that the tech can perform both the inspection and demand service call at the same time.

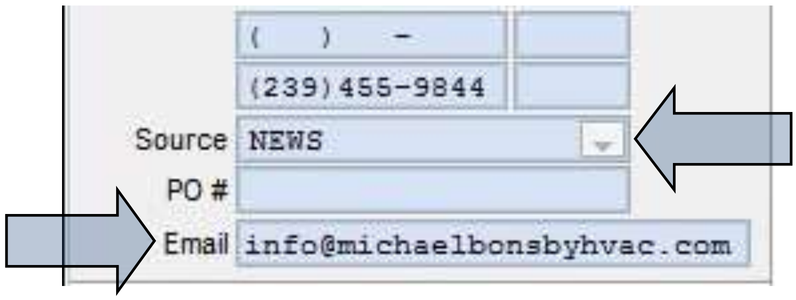


of "Recent" Calls - On the top right hand side of the Call Slip you will notice a new field called "Recent" with a number after it. This is the number of "Recent" call slips that have been created for this site, alerting the dispatcher if there may be a problem if there are too many recent calls generated. The "Recent" field can be defined between 1 and 12 months in the system setup. So for example, if you set your recent to 2 Months and it shows you have 4 calls in your Recent field, the dispatcher may want to investigate further to find out if it is a reoccurring problem or if that many calls are legitimate.



Source Field Can be Made a Must Fill Field - You now have the option of making the "Marketing Source" field a must fill field, so that the dispatcher is required to enter something in that field before being able to save a new call slip. This is done in the Setup System under Miscellaneous Settings.

Site E-Mail Address on the Call Slip Screen - If you have an e-mail address for the site, it will appear in this field for verification or editing. If you do not have the e-mail address for the site, it can be added on the fly. This field will also be used to send a Technician Biography to the customer prior to the technician arriving at their site (see the information about Tech Bio later in this document).



Service Agreement Opportunity Tracking: If you create a service call for a site that doesn't have an Active Service Agreement, the system will automatically mark it as a Service Agreement Opportunity. If the technician sells a service agreement on the call, the office can mark it as such, which will track how many Service Agreement Opportunities there were, how many were sold and the closing percentage. This information will appear in the Technician KPI Screen, Technician KPI Report and the S/A Opportunities Report.

Call Back Technician: In addition to being able to mark a call slip as being a call back, you can now track who the original technician for whom was responsible. When marking the call as a call back, simply select the offending technician from the drop down list. This information can be seen in the Technician KPI screen and can also be used when running the Technician Profitability Reports.

Technician Biography - If you have the optional e-mail / Paging module, you will now be able to e-mail a Technician Biography to the customer prior to the technician's arrival. The Tech Bio can include information such as your Company Name, Address & Phone Number, Logo, Call Slip Number, Scheduled Time Range (optional), information about your company, a picture of the technician as well as the tech's name and a brief biography about the technician which can include both company achievements as well as personal traits. What a great way to introduce your company and the technician to your customer before they ever arrive.


Team Air Conditioning

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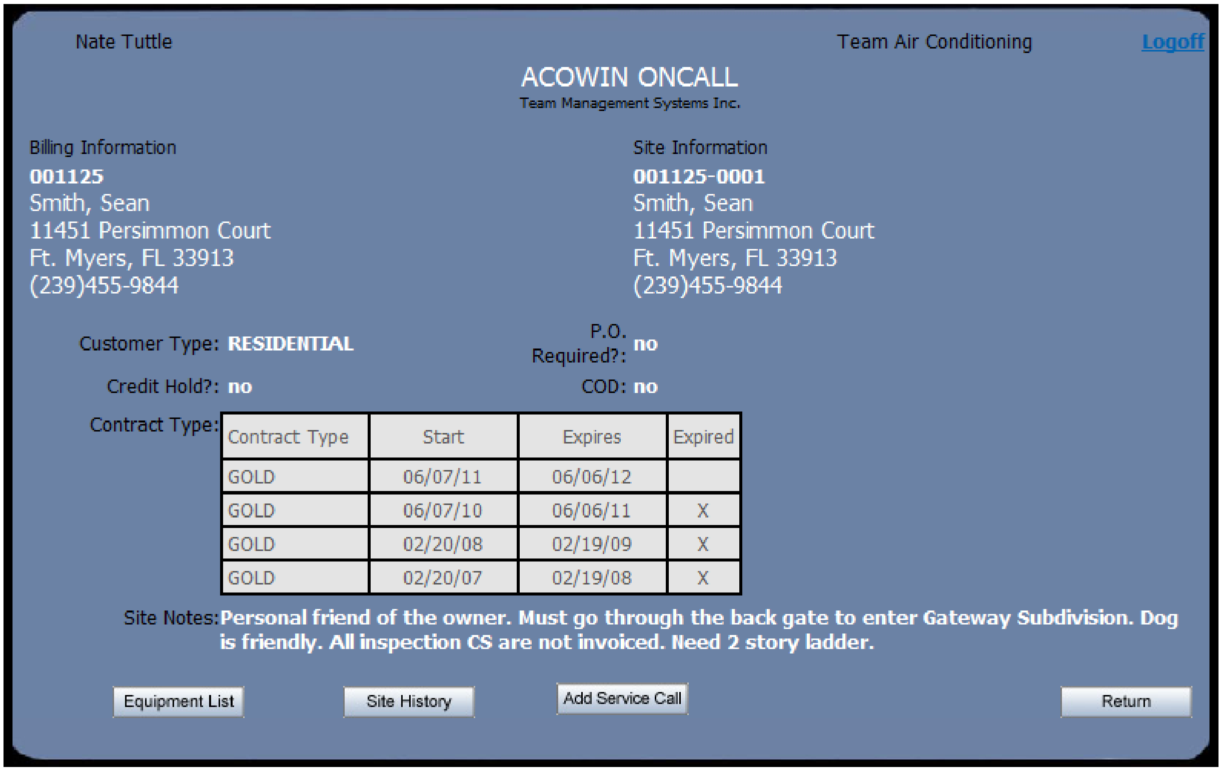
Ft. Myers, FL 33913
(239)437-8898

Scheduled Technician Profile
Nathan Tuttle

Nathan Tuttle, a NATE Certified HVAC technician with our company, will soon be arriving at your requested location to meet your Comfort System repair needs. Nathan has successfully completed extensive HVAC certifications and has passed all given motor vehicle, drug and background screenings. You can trust Nathan to take care of your comfort needs in a professional and courteous manner! If you have any questions about your appointment, or if you need to make a change, please call 239-437-8898. We look forward to serving you.

ACOWIN OnCall (Add On Module) - ACOWIN OnCall will allow technicians to look up existing customers in ACOWIN over the internet and view important information such as: site details, if they are on Credit Hold or COD, their Site and Customer address information, if they have a contract and when it expires (as well as any contracts they had in the past that have expired), view the customer's equipment details (inlcuding individual equipment history) and overall site history. Based on permissions, the technician can even add a new service call in the field that will automatically add it to the Dispatch Board. It can even assign the call to the technician and mark it for downloading to ACOTRUCK. This is an incredible tool for after hours and weekend calls and is a great companion to ACOTRUCK (although ACOTRUCK is not required).



New Reports

- **Happy Calls Report** - This report reads the responses to the Happy Calls and compiles a "Report Card", showing you the percentage of positive and negative responses for each of the Happy Call questions.
- **Site Calls (High Call Slip Volume) Report** - This report is designed to alert you of possible potential problem sites based on a high call slip volume over a specific Date Range.
- **S/A Opportunity Report** - The Service Agreement Opportunity Report shows how many service agreement opportunities you had for a given time period and how many were actually sold based on both number and percentage.
- **Technician KPI Report** - This report provides important Key Performance Indicators to determine how well technicians are performing.

- **Contract Customer Labels** - This report prints mailing labels (that can be exported to Excel) based on various data in the Contract (Service Agreement) file.
- **Lead Technician Profit Report** - Unlike the regular Technician Profit Reports that automatically distribute income and costs between all of the technicians dispatched, the Lead Technician Profit Report provides overall income, cost and profitability for the call slips worked by the selected Lead Technician.
- **Employee Leave Report** - This report reads the Leave data from the Employee File to produce a report of the dates and time that an employee was recorded on Leave.