What's new in ACOWIN 5.10
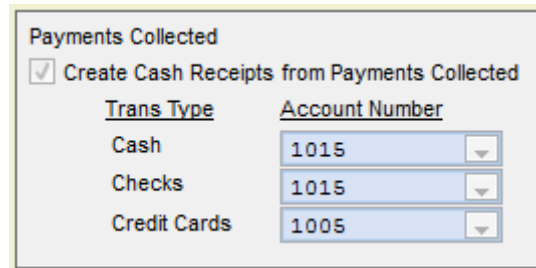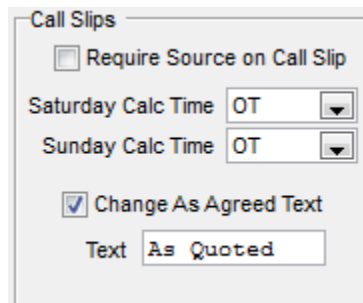
Following are the key features that have been enhanced, added to, or made available with ACOWIN version 5.10.

Automatically create cash receipt payments in QuickBooks or ACOWIN Accounts Receivable when the Call Slip Invoice is Synchronized – A new feature has been added that will allow ACOWIN to automatically create a cash receipt payment in QuickBooks or ACOWIN A/R. This optional feature allows you to determine to which account you want your payment to be created to for Cash, Checks and Credit Cards. Typically you would select your Un-Deposited funds account.
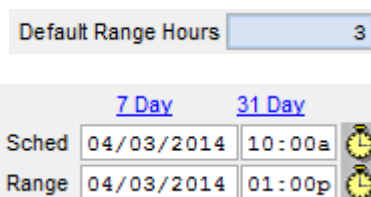

Automatic Overtime and/or Double Time Calculation for Weekend Calls – You now have the option to have ACOWIN automatically have call slips that are dispatched on a Saturday or Sunday to calculate their time as Overtime and/or Double Time. If you elect to use this feature, it will also affect how ACOTRUCK calculates the time for calls dispatched on Saturday and Sunday.


Automatic Range Time Calculation – You now have the option to setup a default number of Range Hours so that when scheduling a Call Slip, you can have the system automatically fill in the Range Time based on a pre-set number of hours. To fill in the Range Time, simply click the "Clock" icon next to the Range Time field and it will add the default number of hours to the Scheduled time and populate the Range Time field with that time.

Enhanced History Viewing – The History screen is now bigger and you can view Site History while adding a new call slip or editing any of the Call Slip screens *without* having to Save the Record. Simply click the History button and the history screen will appear. As always, you can still zoom into the details of

individual calls from the History screen. Prior to this release, you could not view the history while adding or editing a call slip.
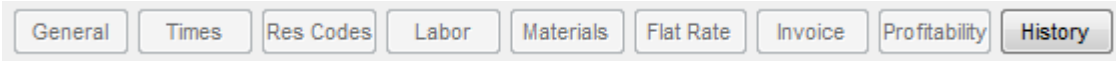
Ability to designate "On Call" technicians – If you designate a technician as "On Call", you will see it displayed on the Dispatch Board, 31 day Calendar and the new On-Line Schedule Board available with OnCall. This makes it quick and easy for your call taker or dispatcher to instantly see who is On Call if a call comes in that needs to be serviced after hours or scheduled for late afternoon. The OnCall technician's name will appear on a blue background.
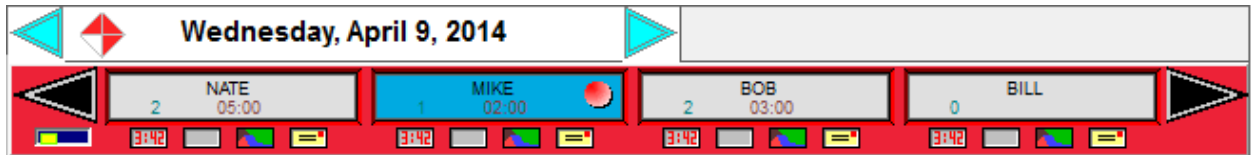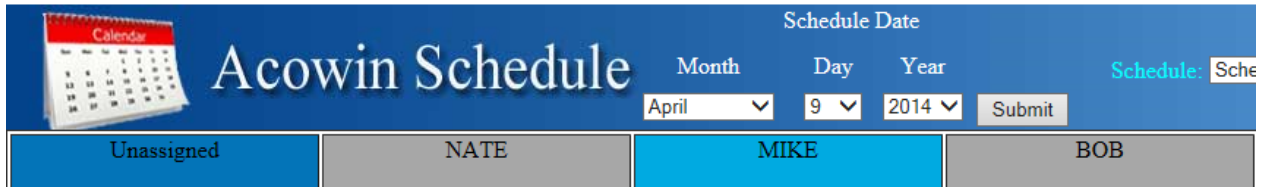
Ability to Not Transfer Inventory Costs to Accounting When Syncing Invoices – You now have the option to not transfer inventory costs to Accounting if you are not tracking inventory. Prior to this version, you would have to use the same General Ledger Account number for both the Debit and Credit in accounting so that the net entry would be .00. If you elect to use this feature, the Debit and Credit will not be transferred to Accounting at all, therefore not creating a general ledger entry.

Ability to Access the Schedule Board over the Internet and modify the schedule (Must have the OnCall Module) – If you have the OnCall Module, you can allow the OnCall user access to the Schedule over the internet and can even allow them to change the schedule, which will automatically update the Schedule Board at the office. The Schedule Board feature can be limited as to who can see it and whether that user has the option to change the schedule. For example, you may want to give owners and managers the ability to view the schedule online and make changes; however, you probably would not want to

allow service technicians to even view the schedule. You might also allow sales people to view the schedule but not make any changes. This way they can let a customer know if a preferred date for an install is available. You can even drill into the OnCall Site Information from the schedule and view equipment, history and place a new service call if needed.

Ability to change the "As Agreed" text on Flat Rate / As Agreed invoices – If you do not like the words "As Agreed" printing on As Agreed or Flat Rate Invoices, you now have the ability to change the text that prints next to the sell price. If you use this feature, it will change the text on both ACOWIN and ACOTRUCK invoices.

Ability to track Invoices and Purchase Orders that were e-mailed from ACOWIN – Any time an invoice or purchase order is e-mailed from ACOWIN, it will now keep a log file of who sent it, the date and time it was sent, as well as the e-mail address to which it was sent.

Enhanced Purchase Order Options – You can now select a default location as to where you would like items ordered on a purchase order to be shipped. For example, you may be issuing a Service Purchase order for a particular job, but instead of the material being shipped to the job, you want it shipped to your Main Warehouse. Prior to this version, it would automatically assign it to ship to the Site Address and you would have to manually change each line item to your Warehouse. Now you can define the default ship to and still override individual items if you want.

Enhanced Purchase Order Options 2 – Free key without lookup – A new option has been added to the Purchase Order to allow you to enter an item in the description field without doing a lookup to see if it exists in your inventory list. This is a great feature when entering purchase orders for items that you don't carry in your inventory list and will save you from having to cancel the lookup window for each line item added.

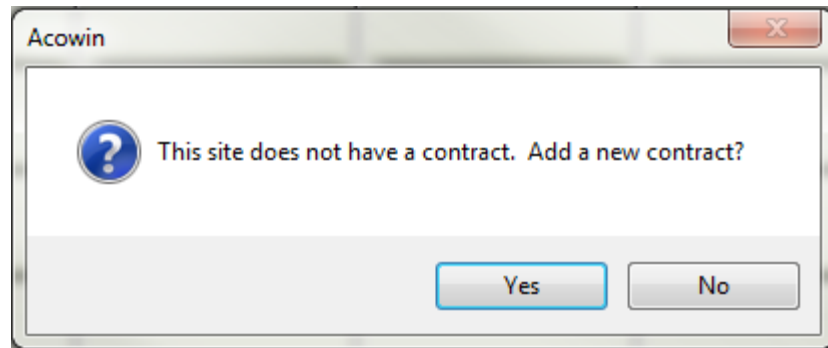**Add New Service Agreements From Dispatch Board and Call Slip File Jump Menu –** You can now add a new Service Agreement (Contract) directly from the "Jump Menus" located on the Dispatch Board and the Call Slip file. If the customer has never had a service agreement, you can now add it directly from the Jump Menu as opposed to having to "Jump" to the Customer File and then add it from there. Simply bring up the Jump Menu and click the "Contract" button. If the customer does not have a contract, you will be prompted to add a new one.
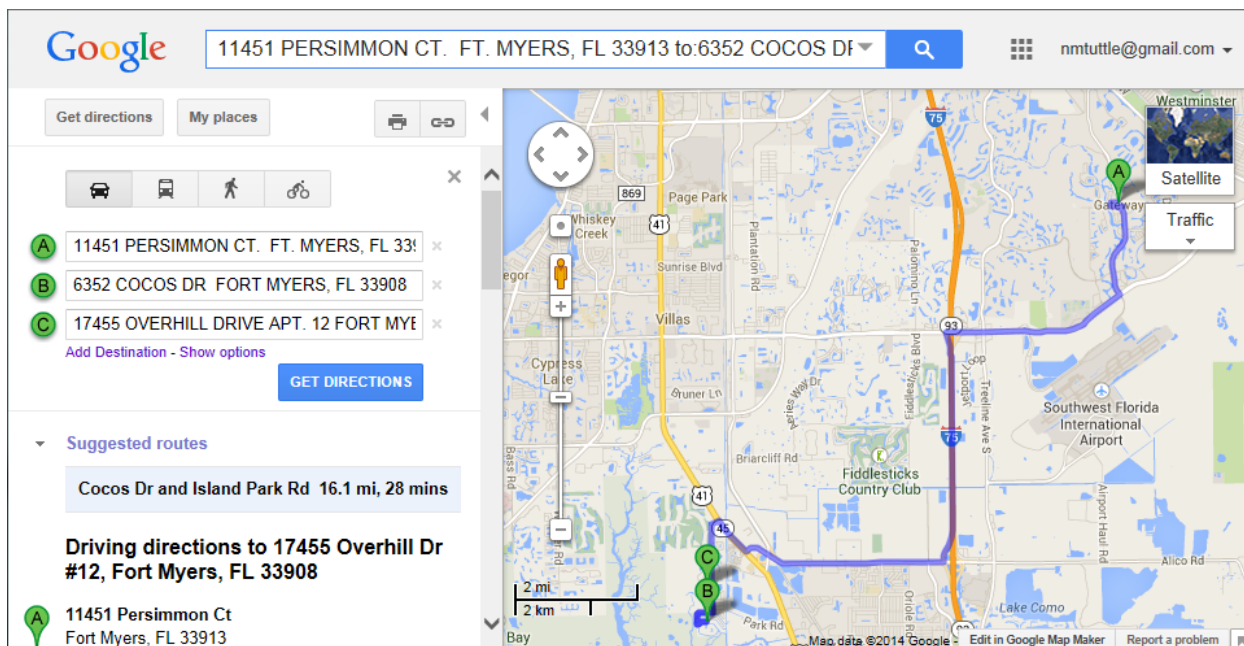
| Call Slips |
| Purchase Order |
| Happy Call |
| Customer / Site |
| Equipment |
| Contract |
| Quote |
| Job Cost |
| Cancel |

Acowin

? This site does not have a contract. Add a new contract?

Yes   No

Quick View of Late Technicians – You can now click the "rotating diamond" at the top of the Dispatch Board and view a list of all techs that are late for calls, as well as the site name to which they are late, the call slip number, the scheduled time and the problem code of the call.

Late Techs

Tech	Site Name	Call Slip #	Scheduled	Problem Code
BOB	Wasik, Matt	2794	03:00p – 06:00p	INSTAL
MIKE	Highsmith, Cindy	2704	03:00p – 06:00p	NC
MIKE	Philpot, Josh	2721	09:00a – 12:00p	INSP
NATE	Smith, Sean	2792	11:00a – 02:00p	NC

Close

Quickly view how many calls are in scheduled on a particular date in the zone of the call slip being scheduled – When using the 31 Day Calendar to schedule a call slip, you will now notice a red number in the top right hand side of each date. This number indicates the number of call slips in the same zone as the call slip being scheduled. This will help the call taker to be more efficient when scheduling calls and keeping techs in the same area.

Google® Map Interface – You can now view a Google Map that shows where all of the calls in a particular column on the Dispatch Board are located (Google Maps allows up to 25 addresses to be displayed at once as long as you are using Classic View for Google Maps), or you can view where a particular call is located on Google Maps. To view a columns worth of calls, simply right click the Map icon at the top of the column on the Dispatch Board. To view an individual call location, right click on the call and right click the Map Icon in the "Dispatch Record Detail" screen. NOTE – This feature at the time of this writing only works with Google Maps in the Classic view. The new Google Maps does not support passing through multiple addresses at this time. You will need to set your computer(s) to use Classic View for this feature. This feature is based on Google's licensing and terms of use and may change at any time without notice.

ACOTRUCK – Ability to change the Taxable and Non Taxable Flags on a Call Slip in ACOTRUCK (optional) – If you are in a state where certain types of calls are taxable and others are not depending on the type of work being performed, you can allow the technician the ability to change the taxable flags. This is an optional feature and you would have to give the tech permission in the Employee file on the ACOTRUCK setup screen.

ACOTRUCK – Allow technician to change estimated amount of time call should take (Optional) –
You now have the option to allow the technician to change the estimated amount of time that a call should take, which will automatically update the record back at the office. If the time is changed in the field, a diary entry will be created for the visit and an indicator will appear on the schedule board to alert the dispatcher that there is a diary record that needs attention. This is an optional feature and you would have to give the tech permission in the Employee file on the ACOTRUCK setup screen.

ACOTRUCK – Technicians can now signify if they sold a Service Agreement – On the Status Change screen, a new option has been added for a technician to indicate if they sold a service agreement to the customer. If they did, it will update the Service Agreement Opportunity flags in ACOWIN when the call is returned, which will affect their Technician KPI Report.