What's new in ACOWIN 5.20

Following are the key features that have been enhanced, added to, or made available with ACOWIN version 5.20.

Dispatch Board

Ability to pick what columns (techs) rollover and the ability to keep the scheduled and range time – The rollover feature has been significantly enhanced to allow you to pick which columns to rollover on the Dispatch Board as well as if you want to keep the Scheduled time and Range time. You will have the option to select to roll over all columns company wide, the current board you are viewing, just the unassigned column, or any specific column.

Technician KPI (Key Performance Indicators) – 2 great sections have been added to the Technician KPI screen. To access the Technician KPI screen, Right Click the techs name at the top of the column on the Dispatch Board and click on the KPI button. The report can be found in the following location: **Reports / Technicians / Technician KPI Report.**

1. **Travel Time vs. Work Time Section** – You will now see how much time the technician spent traveling vs. actual work time, in both hours and minutes as well as percentage. In addition to this being on the Screen, it is also on the Technician KPI report.


2. **Service Goal Section** – You can now set up a Service Sales Goal that you want a tech to achieve daily in the Employee file, and the actual sales vs. the Goal will

appear on the KPI. The KPI will show the Posted Sales, the Goal and the Variance in a dollar amount as well as what percentage of the goal has been met for the day. (NOTE – only posted call slips will show up towards the goal). In addition to the Goals being on the screen, it is also on the Technician KPI Report.

Service Goal

* Posted Sales:	853.08	
Goal:	1000.00	
Variance:	-146.92	85.31%

Goal information will only appear if a call slip has been posted

Open Call Slip List – An incredible new feature has been added to the "Ready to Invoice List" option, which shows you a list of all of the "Open" call slips that you have in your system. You can sort the list by any of the columns in the grid and can instantly zoom to a particular call slip by double clicking on it, or selecting it and clicking the Detail Button.
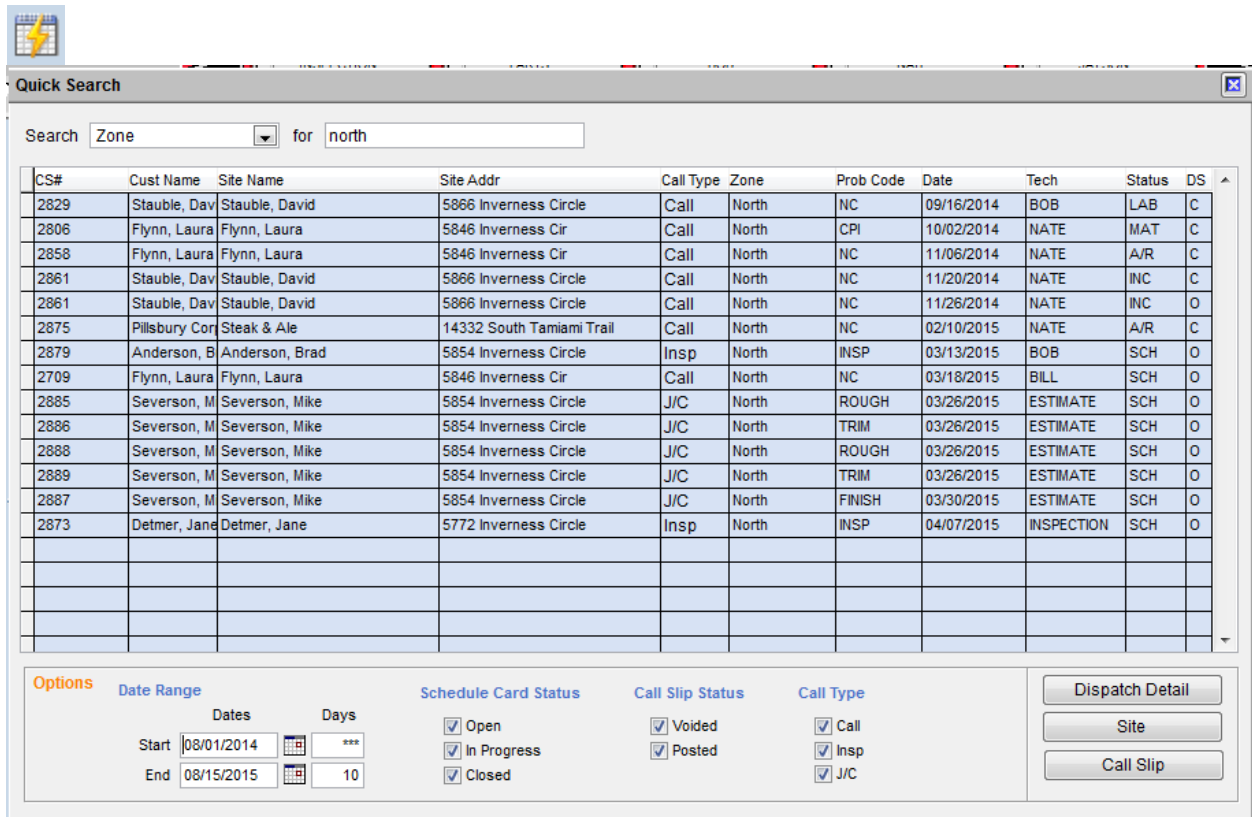

Ready to Invoice List

Show: Ready to Invoice ▼
Ready to Invoice
Open Call Slips

Ready to Invoice List

Show: Open Call Slips ▼
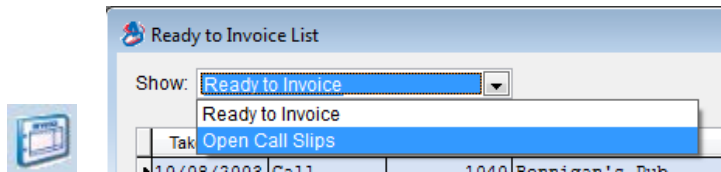
Taken Date	Call Type	Call Slip #	Site Name	Problem Code	Tech	Sched Date	Status	Zone	Mobile
08/04/2015	Insp	2903	Severson, Marcie	INSP	INSPECTION	08/04/15	SCHED	South	
08/04/2015	Insp	2902	Severson, Marcie	INSP	INSPECTION	08/04/15	SCHED	South	
04/17/2015	J/C	2895	Pacific, 12345	ROUGH	BOB	04/17/15	INC	Gateway	
04/17/2015	J/C	2898	Pacific, 12345		PARTS	04/17/15	SCHED	Gateway	
04/17/2015	J/C	2897	Pacific, 12345	FIREOFF	ESTIMATE	04/30/15	SCHED	Gateway	
04/17/2015	J/C	2896	Pacific, 12345	INSAH	ESTIMATE	04/24/15	SCHED	Gateway	
04/07/2015	Call	2891	Wasik, Matt	INSTAL	BOB	04/15/15	INC	South	
03/25/2015	J/C	2889	Severson, Mike	TRIM	ESTIMATE	03/26/15	SCHED	North	
03/25/2015	J/C	2888	Severson, Mike	ROUGH	ESTIMATE	03/26/15	SCHED	North	
03/25/2015	J/C	2887	Severson, Mike	FINISH	ESTIMATE	03/30/15	SCHED	North	
03/25/2015	J/C	2886	Severson, Mike	TRIM	ESTIMATE	03/26/15	SCHED	North	
03/25/2015	J/C	2885	Severson, Mike	ROUGH	ESTIMATE	03/26/15	SCHED	North	
03/17/2015	Call	2884	Kay, Raymond	INSTAL	MIKE	03/18/15	INC	South	
03/16/2015	Call	2882	Adams Construction	NC	BILL	03/18/15	SCHED	Gateway	
03/11/2015	Insp	2881	Publix Supermarkets #218	INSP	NATE	04/22/15	SCHED	South	
03/11/2015	Insp	2879	Anderson, Brad	INSP	BOB	03/13/15	SCHED	North	
02/10/2015	Call	2876	Animal Clinic Of Fort Mye	REF	NATE	02/25/15	DISP	South	
02/10/2015	Call	2877	Chilis Estero	NC		02/10/15	UNSCHD		
02/05/2015	Insp	2874	Animal Clinic Of Fort Mye	INSP	BOB	03/12/15	SCHED	South	
02/05/2015	Insp	2873	Detmer, Jane	INSP	INSPECTION	04/07/15	SCHED	North	
02/05/2015	Insp	2872	Severson, Marcie	INSP	NATE	03/25/15	SCHED	South	
12/10/2014	Call	2867	Jones, Andrea	NC	BOB	08/04/15	INC	Brooklyn	
12/10/2014	Call	2866	Kay, Raymond	INSTAL	JAYSON	12/11/14	INC	South	
12/10/2014	Call	2865	Kay, Raymond	NC	NATE	12/10/14	SCHED	South	
11/26/2014	Call	2862	Gilliam, Karl	NC	NATE	12/09/14	SCHED	Gateway	
11/20/2014	Call	2861	Stauble, David	NC	NATE	11/26/14	INC	North	
11/06/2014	Call	2860	Miller, Andy	NC	NATE	12/08/14	SCHED	South	
11/05/2014	Insp	2857	Jones, Mike	INSP	INSPECTION	12/08/14	SCHED	South	
11/05/2014	Call	2856	Keane, Sarah	HEAT		12/08/14	UNSCHD	South	
11/04/2014	Call	2854	Zoller, Jayson	NC	NATE	12/05/14	INC	Central	

Highlight a Call Slip in the list and then click detail.

Print   Detail

Quick Search option - Another exciting new feature added to the Dispatch Board is the ability to do a Quick Search for dispatch records on the schedule board. This will allow you to quickly search for dispatch records based on the Call Slip #, Site Name, Customer Name, Site Address, Zone or Problem Code. You can narrow your search down by the status of the dispatch record, call slip status and the type of call (Call Slip, Inspection or Job Cost). Once you have your list, you can instantly jump to the Dispatch Detail Record, Site File or the Call Slip itself.

Quick Search

Search [Zone ▾] for [north   ]

CS#	Cust Name	Site Name	Site Addr	Call Type	Zone	Prob Code	Date	Tech	Status	DS
2829	Stauble, Dav	Stauble, David	5866 Inverness Circle	Call	North	NC	09/16/2014	BOB	LAB	C
2806	Flynn, Laura	Flynn, Laura	5846 Inverness Cir	Call	North	CPI	10/02/2014	NATE	MAT	C
2858	Flynn, Laura	Flynn, Laura	5846 Inverness Cir	Call	North	NC	11/06/2014	NATE	A/R	C
2861	Stauble, Dav	Stauble, David	5866 Inverness Circle	Call	North	NC	11/20/2014	NATE	INC	C
2861	Stauble, Dav	Stauble, David	5866 Inverness Circle	Call	North	NC	11/26/2014	NATE	INC	O
2875	Pillsbury Cor	Steak & Ale	14332 South Tamiami Trail	Call	North	NC	02/10/2015	NATE	A/R	C
2879	Anderson, B	Anderson, Brad	5854 Inverness Circle	Insp	North	INSP	03/13/2015	BOB	SCH	O
2709	Flynn, Laura	Flynn, Laura	5846 Inverness Cir	Call	North	NC	03/18/2015	BILL	SCH	O
2885	Severson, M	Severson, Mike	5854 Inverness Circle	J/C	North	ROUGH	03/26/2015	ESTIMATE	SCH	O
2886	Severson, M	Severson, Mike	5854 Inverness Circle	J/C	North	TRIM	03/26/2015	ESTIMATE	SCH	O
2888	Severson, M	Severson, Mike	5854 Inverness Circle	J/C	North	ROUGH	03/26/2015	ESTIMATE	SCH	O
2889	Severson, M	Severson, Mike	5854 Inverness Circle	J/C	North	TRIM	03/26/2015	ESTIMATE	SCH	O
2887	Severson, M	Severson, Mike	5854 Inverness Circle	J/C	North	FINISH	03/30/2015	ESTIMATE	SCH	O
2873	Detmer, Jane	Detmer, Jane	5772 Inverness Circle	Insp	North	INSP	04/07/2015	INSPECTION	SCH	O

Options

Date Range

	Dates	Days
Start	08/01/2014	***
End	08/15/2015	10

Schedule Card Status
☑ Open
☑ In Progress
☑ Closed

Call Slip Status
☑ Voided
☑ Posted

Call Type
☑ Call
☑ Insp
☑ J/C

[Dispatch Detail]
[Site]
[Call Slip]

Show only specific records on your Dispatch Board – You now have the ability to show specific dispatch records on your Dispatch Board, such as Completed Calls, Posted Calls, Voided Calls, Regular Call Slips, Inspection Call Slips, or Job Cost Call Slips. *By default, ALL dispatch records will show on your dispatch board each time you open it*, but you can use the "Dispatch Settings" to narrow down what you see to only specific records or call types. For example, you might have a full board for the day, but you quickly want to only see any "Inspection" call slips that are scheduled. Or it may be near the end of the day and you want to only show any open call slips that are left. In other words, "Hide" Completed and Posted call slips for the day.
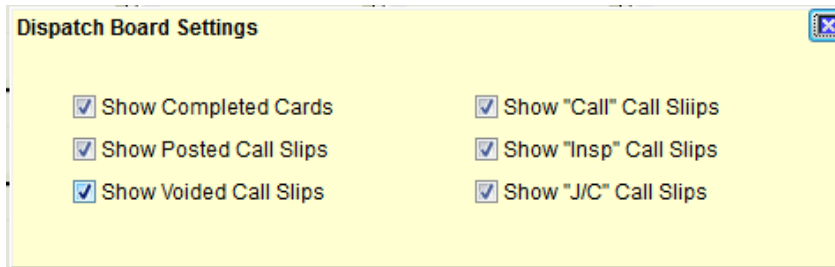
Multi Tech (Crew) Scheduling – ACOWIN now makes it very quick and easy to schedule one or several technicians to a call slip or job for a single day, or multiple days. This feature is available on the Dispatch Detail Record and on the Call Slip screen. If you need to schedule a technician for the same job for multiple days, or several technicians to the same job for one or multiple days, you will love the Multi Tech scheduling feature. Simply enter the Start and Ending dates, the scheduled time, if you want to include Saturday and Sunday if they fall in your date range, the estimated time per day and select which technicians you want to schedule. The screen will display how many records will be created, and then automatically schedule the techs on the dispatch board for the dates and techs selected.
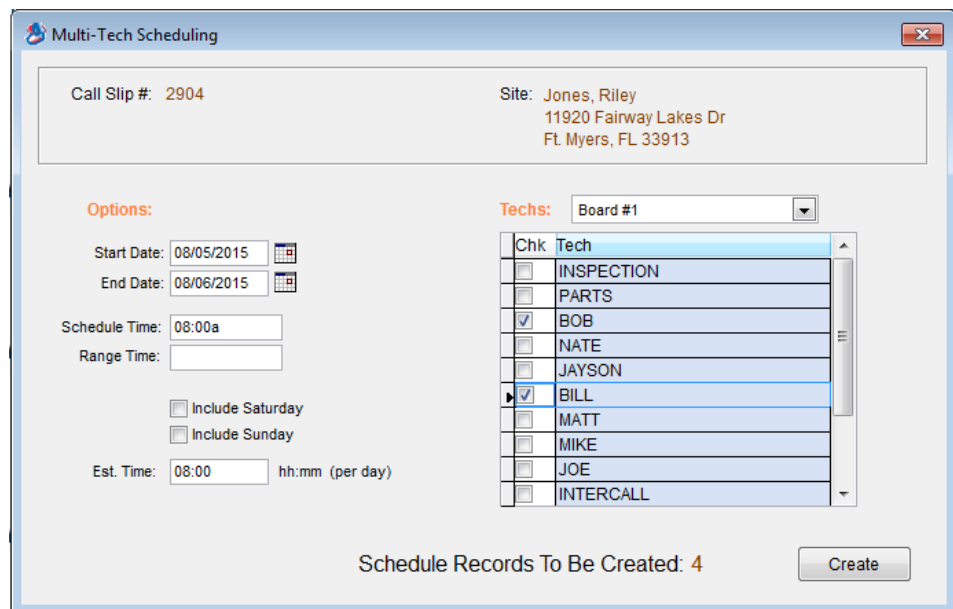
Call Slip Notes – You can now add or view notes that are directly associated to the call slip. These notes are designed for internal notes about the call slip, such as if parts are on order, the call had to be re-scheduled, permit has been applied for, called for inspection, etc. Notes can be entered, modified and viewed from the Call Slip Advanced screen or from right clicking the dispatch record. If you have a note associated with the Call Slip, the dispatch record will display a narrow blue line the card, indicating that there are notes associated with it.
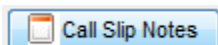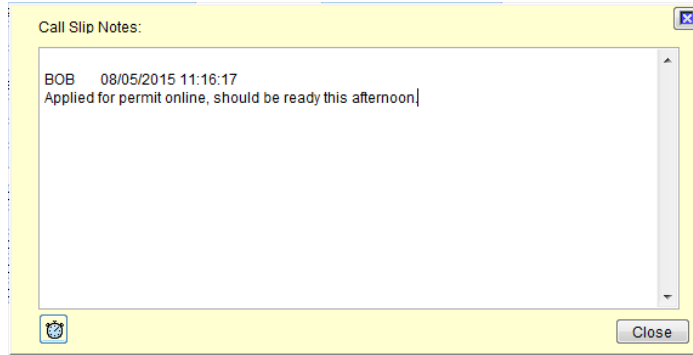
Ability to change between different dispatch boards on the 31 day calendar – You now have the option to switch between your different dispatch boards on the 31 day calendar. Therefore, if you have one board with all of your service techs, another board with all of your installers, etc., you can move between the boards on the 31 day calendar.

Zone of call being scheduled now shows on 31 day calendar and any calls scheduled in that zone will be highlighted in green when looking at the "Calls" tab – If you are using the 31 day calendar to schedule a call, you will now see the Zone in which the call is located at the bottom right hand side of the screen. If you click on the "Calls" tab at the top of the screen, any calls in the same zone will be highlighted in Green so that you can quickly determine who to send to the call. Remember in a prior release of ACOWIN, the number of calls for each date in that zone will appear in red in the top right hand corner of each date on the 31 day calendar so you can easily determine what dates you have calls in the same zone.

Lunch Tracking – You can now track when a technician takes lunch for the day. If the technician has not taken a lunch for the day, the check box at the top of their column on the Dispatch Board will be empty. When they are at lunch, the check box will have a yellow background with an "X" indicating that the tech is at lunch. When the tech has surpassed their allotted lunch time, the check box will have a check mark, indicating that the tech has completed their lunch for the day. In order to avoid confusion, the lunch indicator will only be noted for "Today's" date. To see lunch info for prior dates, you can run the Technician Leave Report or look in the Leave File and select the option for Lunch. **NOTE –** If you are using ACOTRUCK, the tech can start their lunch time from the field, which will automatically update the dispatch board back at the office.
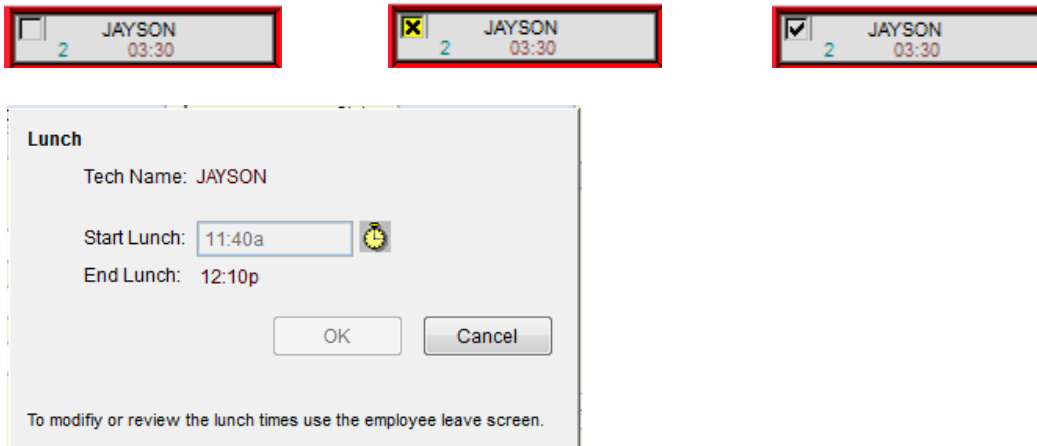
Ready To Invoice List – If you change the status on a call slip and put a check mark in the "Transfer to A/R Flag" field, but do not post it, the Status will be highlighted yellow in the Ready to Invoice list. This will let you know at a glance which ones you have "completed" if you are batch posting your invoices as opposed to posting them one at a time.

Call Slips

Next Inspection Date is now a Hyperlink to the Contract File– If you are looking at or adding a call slip for a customer that has a maintenance agreement with inspections left, the call slip screen will show you the month and year of the next inspection. A

hyperlink has been added so that if you click the Next Inspection text, the system will automatically jump to the contract file so you review the contract and/or create the inspection slip for the inspection on the fly.

Multi Tech (Crew) Scheduling – You can access the Multi Tech (Crew) scheduling feature discussed earlier in this document from the Call Slip screen. This will allow you to quickly schedule multiple dates and/or techs at the time of call slip creation.

Call Slip Notes – The Call Slip Notes discussed earlier in this document can be accessed from the "Advanced" screen on the Call Slip. If you have a note associated with the Call Slip, the dispatch record will display a narrow blue line on the card, indicating that there are notes associated with it.
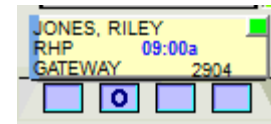
Equipment Year Alert – When viewing the Site's equipment list in the Call Slip file, the equipment year will now be displayed and if a piece of equipment is 10 years or older, the year will be highlighted in Red. This will allow the dispatcher to instantly see that the site has older equipment and determine who the best technician to send for the repair. For example, if the equipment is newer, you may want to send any tech, but if a piece of equipment is in the replacement age, you may want to send a technician that is better at selling a replacement system.

Future Work Text – If you select "Future Work" to appear on the Call Slip while entering a new call slip, it will now display the words "Future Work" above the future work information in the description area of the call slip. If you elect to Show "Problem Text" on the invoice, it will not print the words "Future Work" or anything after it. This will allow you to include prior future work that was recommended to be included in the problem text, which can be seen by the techs using ACOTRUCK, but will not be printed on the customer's invoice if including the problem reported text.

DN – Dispatcher Notes (DNTMS) – If you add a problem code to your system called "DN - Dispatcher Notes" (or "DNTMS – Dispatcher Notes") and select it on a call slip, it along with anything below it will not appear on the invoice if you elect to show the "Problem Text" on an invoice. This allows the dispatcher to enter specific notes for the technician to see in the field using ACOTRUCK, but prevents it from being printed on the invoice if they show the "Problem Text" on the invoice.

Invoice Date field now has the calendar icon as opposed to current date icon – When completing in invoice in the office, the icon next to the invoice date will now bring up your calendar as opposed to automatically defaulting to today's date.
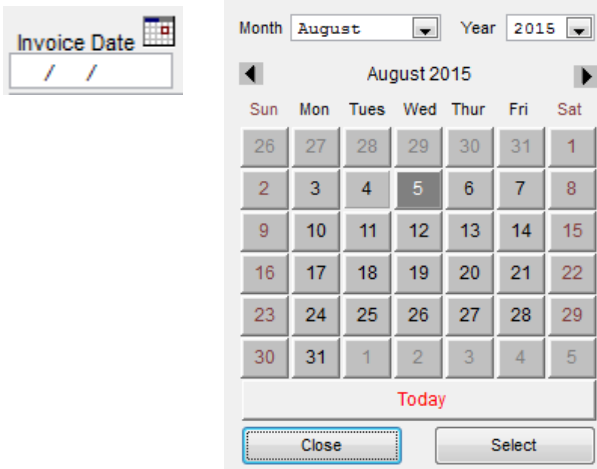
Option to have the sales person transfer to QB during sync – If you are integrating ACOWIN with QuickBooks, you now have the option to have the salesperson associated with the invoice to transfer to QuickBooks. You will need to add the salespersons QB Sync name in the employee file. Once this is done, any invoices that have that salesperson on it will add the name to the invoice in QuickBooks during syncing.

Terms and Invoice Due Date – The terms and Invoice Due Date are now displayed on the bottom left hand side of the Call Slip Profitability Screen. This will allow you to quickly determine the due date when reviewing a Call Slip Invoice.

Site File

Invoice Screen – If you are integrating with QuickBooks, the invoice screen will now display the invoices in reverse invoice date order, showing the most recent invoices first. It will also limit the "Balance" lookup to the first 20 invoices in reverse order by default. This will show you the balance for the most recent 20 invoices, and if you want to see the balance for more than 20, you can select the number show from the drop down selection box. This will speed up the screen considerably if you have a customer that has many invoices.

Contracts

Ability to Hide Dead or Expired Contracts on the Search Screen – By default, the system will now hide any Dead or Expired Contracts from the search screen. If you place a check mark in the "Show Expired / Dead Contracts" check box, then you will be able see all contracts based on the search criteria. If you do elect to show "Expired or Dead" contracts, they will appear in italicized and red text.

Site Name	Contract Number	Site Number	Site Address	Site Address 2	Start Date	Expiration Date
High, Jim	*001123-0001-004*	*001123-0001*	*5860 Inverness Circle*		*11/01/2009*	*10/31/2010*
High, Jim	*001123-0001-005*	*001123-0001*	*5860 Inverness Circle*		*08/01/2013*	*07/31/2014*
High, Jim	001123-0001-006	001123-0001	5860 Inverness Circle		03/01/2015	02/29/2016

☑ Show Expired / Dead Contracts?   Add

Quick Profit Button on Contract Screen – A new "Profit" button has been added to the contract that will instantly show you the profit of a particular contract, based on the sell price, any additional sales on computer generated inspection call slips and the costs from the computer generated inspection call slips. This screen will show you the profitability based on the Total Contract sell price and the Billed to Date amounts.

Contract Profitability   ⊠

	Total Contract	Billed To Date
Contract Value:	249.00	135.75
Additional Sell From Inspection Call Slips:	11.25	11.25
Total Sell:	260.25	135.75
Total Cost:	61.21	61.21
Gross Profit $	199.04	74.54
Gross Profit %	76.48	54.91

Ability to create inspection slips that are more than 3 months out – You can now create inspection call slips as far into the future as you want. Prior to this release, you could only create inspection call slips up to 3 months into the future.

Inventory

Ability to make inventory items inactive – You now have the ability to make an inventory item inactive. Once you make an item inactive, it will no longer appear in look ups throughout the system, transfer to ACOTRUCK or be included on restocking reports and functions. In order to make an inventory item inactive, it must have a zero balance.

Employee File

Technician Service Sales Goals – You can now enter a daily service sales goal in the employee file for technicians. The goal will appear in the Technician KPI Report and the KPI screen from the Dispatch Board, and compare the technician's actual sales vs.

the goal, and show you the variance. The KPI screen will show you for the particular day, whereas the report will calculate the daily goal by the number of days worked in the selection set and use that compared to the total sales during the same time period.

Service Goal

Sales:	7,120.00
Goal:	10,000.00
Variance:	-2,880.00 71.20%

Dashboard

A "Report Card" section has been added to the Dashboard showing you Sales, Costs, Gross Profit, Number of Invoices, Average Invoice Sell Price and Percentages for Service Calls based on the CSR that took the call, the Zone that calls are located and the Marketing Source.

CSR Report Card

CSR Report Card (Service)

Taken By	Sell	%	Cost	%	Gross Profit $	Gross Profit %	# of Inv	%	Average Invoice $
NATE	8,912.14	100.00	4,769.95	100.00	4,142.19	46.48	4	100.00	2,228.04
Total	8,912.14	100.00	4,769.95	100.00	4,142.19	46.48	4	100.00	2,228.04

Zone Report Card

Zone Report Card (Service)

Zone	Sell	%	Cost	%	Gross Profit $	Gross Profit %	# of Inv	%	Average Invoice $
Estero	613.38	6.88	105.14	2.20	508.24	82.86	1	25.00	613.38
Gateway ...	548.76	6.16	76.01	1.59	472.75	86.15	1	25.00	548.76
South	7,750.00	86.96	4,588.80	96.20	3,161.20	40.79	1	25.00	7,750.00
West	0.00	0.00	0.00	0.00	0.00	0.00	1	25.00	0.00
Total	8,912.14	100.00	4,769.95	100.00	4,142.19	46.48	4	100.00	2,228.04

Source Report Card

Source Report Card (Service)

Source	Sell	%	Cost	%	Gross Profit $	Gross Profit %	# of Inv	%	Average Invoice $
	0.00	0.00	0.00	0.00	0.00	0.00	1	25.00	0.00
GOOG	1,162.14	13.04	181.15	3.80	980.99	84.41	2	50.00	581.07
INET	7,750.00	86.96	4,588.80	96.20	3,161.20	40.79	1	25.00	7,750.00
Total	8,912.14	100.00	4,769.95	100.00	4,142.19	46.48	4	100.00	2,228.04

Setup

Lead Types can be made inactive – Lead Types, which are used in the Quick Quote screen can now be made inactive in the Setup System if you no longer want them to be used.

Job Task Codes can be made inactive – Job Task Codes, which are used in the Job Phase setup screen, Task Breakdown screen or on Job Cost Call Slips can now be made inactive if you no longer want them to be used.

ACOTRUCK

Job Cost Call Slips can now be used in ACOTRUCK – You can now download Job Cost Call Slips to ACOTRUCK and enter labor times, material used, add or modify equipment, enter resolutions, readings, attach images and generate a work order to capture the customer's signature.

OnCall Module

Ability to see more than 20 sites when searching for a customer site. In prior versions, your search was limited to 20 sites. Therefore if you had an apartment complex or a commercial customer with lots of sitesit could be difficult to find a particular site. By default, it will still show the first 20 sites, but you can drop down the "Result Count" field and choose a higher number if needed.

Reports

Additional Search and Sort options have been added to many different reports, but the following are some report features that we think deserve special mention.

Service Agreement Opportunity Report – A new option has been added to "Include Contract Details", and for how many months in the future. This feature is designed to be used to make sure that any new contract sales and / or renewals have been added to the system. So if you sold a contract and you ask for the details, and you do not see a new contract on the report, you know that it was not entered into the system. This report can be found in the following location: **Reports / Call Slip / S/A Opportunities Report.**

Call Slip Detail Report – This is a new report that prints a highly detailed overview of all of the information associated with a call slip. It includes information from the Main Call Slip Screen, the Labor and Times Screens, the Material Screen, the Flat Rate Screen, the Invoice Screen and the Profitability Screen. This is a great report to run if you need to review the details of the call slip when you are going to be away from the computer. This report can be found in the following location: **Reports / Call Slip/ Call Slip Detail Report**. You can also print this report for an individual call slip from the Call Slip file using the "Print" icon.
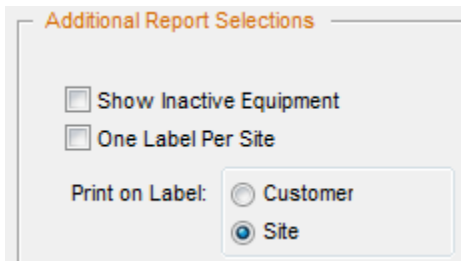
Customer Contract Report – a Selection has been added to this report to show "Active Contracts Only". This will allow you to easily get a list of all your active contracts. Prior to this version, you had to run this same report and enter a starting and ending expiration date to get a list of active contracts, which was confusing for some users to

understand. Simply place a check mark in the "Show Active Contracts Only" check box and your results will only show current contracts. This report can be found in the following location**: Reports / "Customer / Site" / Customer Contracts**.
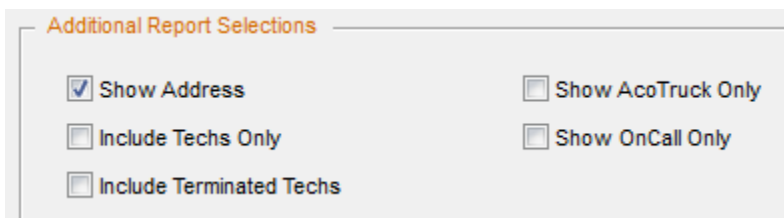

Equipment Label Report – An option has been added to the Equipment Label Report to choose between printing the Customers Address or the Site Address. An option to only print "One Label per Site" was also added to the report, so that if a customer has multiple pieces of equipment based on your selection set, you can limit the report to printing only one label. This report can be found in the following location**: Reports / Equipment / "Equipment / Customer Labels".**

Employee List Report – Two new options have been added to this report to show only employees that have been assigned to ACOTRUCK and only employees that have been assigned an OnCall login.   This report can be found in the following location**: Reports / Miscellaneous / Employee List**

Call Slip Profitability Report (Summary and Detail) – The option to show "Recognized Income" if you are using Deferred Income on your Service Agreements (Contracts) has been added to this report. If you select this option, then any recognized income on Inspection Call Slips will be show as a "Sale" amount on the report, as opposed to only the costs being shown, reducing the technicians profitability. These reports can be found in the following locations: **Reports / Call Slip / Call Slip Profitability Summary**, and **Reports / Call Slip / Call Slip Profitability Detail**.

Additional Options

☐ Include Recognized Income Amount from Inspection Call Slip

Tech KPI Report – Technician Travel Time vs. Work time has been added to the KPI report as well as the technician's Service Sales Goals. The tech KPI report can be found at the following location: **Reports / Technicians / Tech KPI Report**.

Service Agreement Opportunities		Service Goal		
* S/A Opportunities:	3	* Posted Sales:	853.08	
* # S/A Opportunities Sold:	0	Goal:	1,000.00	
* % of S/A Opportunities Sold:	0.00%	Variance:	-146.92	85.31%

Travel Time vs Work Time	Time	Percent
Travel Time:	1:39	22.55%
Work Time:	5:40	77.45%
Total Time:	7:19	100%

* Tech to Whom Minimum Charge Has Been Assigned   Goal information will only appear if a call slip has been posted