

WHAT'S NEW IN ACOWIN 4.15?

Automatic Contract Renewals: The system now includes a tool that will help you automatically create new Contracts for customers who choose to renew their service contract agreements. Each Contract now has an Auto Renew option, on the first screen of the Contracts File, which allows you to designate the Contract for automatic renewal, and offers several methods for setting the price of the renewed Contract. You can renew Contracts for the same price as the previous year, or for the current price associated with the Contract Type, or you can use the previous price plus a percentage increase. A button on the Contract File screen allows you to renew a single Contract immediately, or you can use the Mass Renewal tool, found in the Customer Utilities menu. The Mass Renewal tool can pull up a list of all Contracts designated for Auto Renewal, based on their expiration dates. You can select all of these Contracts with the “Check All” button, or select them individually, then click the “Create” button to produce the new, renewed Contracts. The list of Contracts due for renewal can also be exported into a text file, whether or not you proceed with actually renewing the Contracts.

Credit Invoices: A new button has been added to Call Slips that will allow you to quickly produce a Credit Invoice for a posted invoice. When you click the Credit Invoice button, a window will appear, listing the sale prices from the original, posted invoices. These sale prices will be *reversed*, appearing as *negative* credit amounts. You can adjust these amounts if you wish to issue a partial credit, instead of crediting the full invoice amount. You can set up a standard Problem Code and Resolution Code (i.e. invoice text) to appear on the Credit Invoices, using fields in Setup / Settings / Miscellaneous. These Problem and Resolution Codes can also be over-ridden on individual Credit Invoices, if desired. When you click the Finish button on the Credit Invoice screen, a new Call Slip will instantly be created, using the Problem Code, Resolution Code, and credit invoice amounts you have specified. This Call Slip can be immediately posted and synchronized with your accounting software, applying the desired credit amount to the customer's account.

The Ready to Invoice List: This new feature makes it easy to find all the Call Slips that are ready to be billed and turned into invoices. When you open the Ready to Invoice List, it will instantly list every Call Slip that has reached the “labor complete” (LAB) status or higher, but has not yet achieved the final “posted to Accounts Receivable” (XFER A/R) status. The resulting list will include every Call Slip that has completed labor and/or materials, and is therefore potentially ready for invoicing. You can choose a call and click the Detail button to jump to the full Call Slip screen, where you can complete the billing procedure and create an invoice. When you return to the Ready to Invoice List after completing an invoice, the Call Slip you've billed out will be marked with a special color, to show that invoice has been completed. You can access the Ready to Invoice List from the Dispatch Board, with a new icon that has been added for this purpose, or you can access it from the Utilities button in the Work Orders section of the Acowin Main Menu.

Enhanced Mapping Features: The Acowin interface with Microsoft MapPoint has been dramatically enhanced with several new features. The route map button, located at the top of each technician's column, will now create a map that begins and ends at either the technician's home address, or the company's physical address. The choice of starting and ending point for the route map is made for each technician in the Employee File, so you could have some technicians beginning their day from their homes, while others begin their route from your company headquarters. Maps can now be resized to fit any portion of the screen, allowing for easy viewing of large maps. The map window now includes an Optimize Route button, which will not only rearrange the technician's route to follow the most efficient path and minimize drive time - it will actually rearrange the Call Slips in the technician's column on the Dispatch Board to match the optimized route! If your system does not already include the Acowin Mapping feature, please contact your Acowin sales representative for details on obtaining it.

The Company Diary: A new Diary has been added to the system, called the Company Diary. Like the other Diaries, it has reminders that appear in the small Diary window in the upper-right corner of the Main Menu. You can create Company Diary entries by selecting the Company Diary option on the Company Information Utilities Menu, using the exact same procedure as for the other Diaries - click the Add button, specify a Follow-Up Date, and enter a description or select a Diary Note Code. The Company Diary is unique in that the *system* can *automatically* create Diary reminder notes for Contract Inspections and Contract Invoices. The Setup / Settings / Miscellaneous screen has new fields for setting the day of each month when these reminders should be issued. For example, you could set a reminder for generating Contract Inspections for the 1st of each month, and Contract Invoices for the 10th. These automatically generated Company Diary reminders can be marked "done" when they have been taken care of, the same as with other Diary reminders. The Employee File includes new fields that control which employees will see the Inspection and Contract Invoice reminders as "their" reminders, while all users can see them by toggling the Diary reminder window to "View Everyone's Entries."

Printing Call Slips From the Dispatch Board: You can now print Call Slips directly from the Dispatch Board. Right-click on the desired Call Slip to open the Dispatch Detail window, then click the Printer button on the toolbar.

Attachment Notifications: If you attach files to a Customer, Site, Call Slip, Job, or Contract, the Attachments button will now change visibly, to notify you that Attachments are present. The Attachments button shows a folder overlaid with a blue check mark if there are existing Attachments, alerting you to their presence so you can click the Attachments button and review them.

Automatic Rounding for Accounts Payable Invoices: Acowin's Purchase Orders allow the entry of items with costs that extend to the hundredth of a penny. Since vendor invoices are always rounded to the nearest penny, a new set of fields has been added to the Accounts Payable Invoice screen, to automatically handle rounding adjustments. If you invoice a Purchase Order that had items with costs that include fractions of a penny,

the system will automatically create the necessary rounding adjustment and display it in the bottom-center of the Accounts Payable Invoice screen. A Cost of Goods account can be entered in Accounting Setup / Default Setup to handle these small rounding adjustments.