

What's new in ACOWIN 5.30

Texting

ACOWIN now allows you to setup canned SMS text messages and text your customers. You will be able to text a single call, all calls for a technician's column, or text to multiple technician's columns. In order to use the Texting feature, you will need to sign up for a texting account with Nexmo.com. For instructions on setting up and using SMS Text Messaging, [click here](#).

Chk	Column Name	Chk	Site Name	Address	Site #	CS #	Type	Last
<input type="checkbox"/>	BILL	<input type="checkbox"/>	Flynn, Laura	5046 Inverness Cir	001395-0001	2709	Call	/
<input checked="" type="checkbox"/>	BOB	<input checked="" type="checkbox"/>	JENKINS, MARLYN	5715-5 FOX LAKE DRIVE	001058-0001	3016	Call	00/01
<input checked="" type="checkbox"/>	COLLIER	<input checked="" type="checkbox"/>	Smith, Sean	11451 Persimmon Court	001125-0001	3022	Insp	00/01
<input type="checkbox"/>	DISASSEMBL	<input checked="" type="checkbox"/>	Teterck, Bryan	123 Magnolia Street	001306-0001	3004	Call	00/01
<input type="checkbox"/>	ESTIMATE							
<input type="checkbox"/>	GREG							
<input type="checkbox"/>	GUEST							
<input type="checkbox"/>	INSPECTION							
<input type="checkbox"/>	INTERCALL							
<input type="checkbox"/>	JAYSON							

Auto Sync Calls to ACOTRUCK

You can now setup your system to automatically mark the technician's next call slip to be downloaded when the tech hits the Sync button from the field. This can be defined to only allow one open call slip to be downloaded, or allow the ability to download multiple call slips. This is an optional feature per technician, and does not need to be implemented. This feature is enabled in the Employee File in the ACOTRUCK screen by placing a check mark in the "Enable Auto Mark Feature" check box.

Employee

AcoTruck

Co. Code	Company Name	First Name	Last Name	Emp. No.
Team	Team Air Conditi	Billy	Morgan	00002

Licensed User for AcoTruck
 Use IPAD interface
 Enable Auto Mark Feature

Setup Information for AcoTruck

Company ID: 2
Tech ID: BILL
Tech Password: 123456

Allow change times
 Allow access to advanced labor
 Allow add Purchase Order
 Change Taxable
 Change Estimated Time

Additional Setup

Stock Location: TR10E
Inventory List Location: MAIN
Incomplete Tech: PARTS
Number of Calls for History: 5

Needs Attention Diary Entries

Create Diary Entry for: NATE
Create Diary Entry for:
Create Diary Entry for:

Time Cards | JC Time Cards | Tech | Dispatcher | Employee Info | Departments | Pay Rates | AcoTruck | Remote Tech | Leave | Password | Permissions

If you only want one open call at a time to be allowed on the technician's device, go into Setup, click on the Settings button and go to the Miscellaneous screen. Place a check mark in the "Only allow one Auto Mark for AcoTruck" check box.

Dispatch Board

The Dispatch Board has an updated, refreshed look.

The SMS texting icon has been added to the Dispatch Board. Clicking this option will open the SMS Texting option allowing you to send a text message to customers.



New color coding has been added to the Technician's name header at the top of the Dispatcher indicating if a technician on Leave can still be assigned calls. A Medium Gray color (see Bob below) with the Estimated Hours in White indicates that a tech is on Leave, but can still be assigned calls. This option would be used if a technician has scheduled training, a doctor's appointment, etc. for a portion of the day, but can be scheduled the remainder of the day. Dark gray indicates that the technician is on Leave and can't be assigned any calls for the day. This option would be used when the technician is on vacation, sick, etc.



Vendor Bill

You can now assign a Profit Center to the Sales Tax account. ACOWIN has always associated a Profit Center with the items purchased, but the sales tax would go to the main sales tax account. Now you can assign the sales tax expense (or COGS) to the Profit Center also.

Keycode	Description	Vend Part #	Qty	Cost	Extended	Detail
CAP002	Motor		1	125.0000	125.00	
	Capacitor, 5 MFD		1	5.5000	5.50	

Vendor: Johnson Supply Invoice Date: 11/27/2017 Status: Created
 PO Num: 525 Invoice Number: 73342 Mark to Transfer to A/P:
 Terms: 2%10Net30 Bill Total: 130.50 Hold:

A/P Account: 2000 Offset Account: 2020
 Tax Account: 5000 A/P Rounding Acct: 5120
 Profit Center: RNC A/P Rounding Adj: 0.00

Subtotal: 130.50
 Tax: 0.00
 Offset: 0.00
 Grand Total: 130.50

Contract Invoice

You can now show the amount collected on a Contract Invoice. This comes in handy if you need to reprint a Contract Invoice and want to reflect that you have received payment for the invoice.

Contract Invoice

Site ID: 001148 0001 Bill To: 001148 Beltz, Raymond Batch #: Status: Printed

Contract No.: 001148-0001-003 Tax Region: FL TMS

Invoice Number: C- 1424

Invoice Date: 11/01/2 Creation Date: 11/17/2 Last Modified: 11/17/2

NOTE - The received amount is for informational purposes only and will be reflected on the printed invoice. It does not create a payment in accounting.

Collected: 263.94

Buttons: Cancel, Apply

Footer: CONTRACT

Buttons: Collected, General, Status Change

Job Cost Invoice

You can now show the amount collected on a Job Cost Invoice. This comes in handy if you need to reprint a Job Cost Invoice and want to reflect that you have received payment for the invoice.

Job Cost Invoice

Job #: 1705-0001 Job Name: Subway Req #: 1 Base / Extra: Base

Billed To: 001229 SARG'S JAVA ROOM Distribution Code: DEFAULT

Tax Region: Exempt Billed To: WEST Job Name: Subway

Cust PO #: Base/Extra: Work & Co: Amount Pr: Build Text:

Status: Created Invoice Date: 05/11/2017 Invoice #: J- 1034

Mark to Transfer to A/R: Remaining: 9195.00

Show on Invoice: Tax/Non Taxable Breakdown: Tax Amount:

NOTE - The received amount is for informational purposes only and will be reflected on the printed invoice. It does not create a payment in accounting.

Collected: 2500.00

Buttons: Cancel, Apply

Material	0.00	5000.00	5000.00
Misc	0.00	0.00	0.00
Subtotal			7000.00
Sales Tax			0.00
Grand Total			7000.00

Buttons: Collected, General, Status Change

Purchase Orders

You now have the option of changing the “Ship To” for Purchase orders to “Pick Up”, which will print out on the Purchase Order. This option is used for Will Call items that someone will pick up from the supply house, as opposed to having it shipped. You can do this for an individual item or for the entire Purchase Order.

The screenshot shows the 'Purchase Orders' window. At the top, there are fields for 'PO Num', 'Default Vendor' (Johnson Supply), 'Date Created', 'Created By', 'Last Date Changed', 'Last Date Posted', and 'Status'. Below these are 'Default Inventory' and 'Location' (MAIN). A 'Ship To Defaults' dialog box is open, containing a table of items and a section for overriding default ship-to values.

KeyCode	Descr	Ext	Total Rcvd
MOT001	1/4 HP Generic	96.0000	
CAP001	Capacitor, 4 MF	9.2000	

This is an optional feature used to override the default Ship To values when adding items

Default Inventory Ship To: Pickup
Default Call Slip Ship To:
Default Job Cost Ship To:
Buttons: Assign Defaults To All PO Items, Clear All, Close

Type Legend:
I Inventory
C CallSlip
J JobCost

CallSlip: 2 PO Total: 105.2000

Service Invoices

You now have the option to show print the Equipment Location on a Service Invoice as well as the option to Suppress Blank Checklist Items. This is a default setting, when set will automatically show the Equipment Location if the option to show Equipment is selected and will suppress the Blank Check List Items if that option is selected. To set it up to show Equipment Location and/or suppress blank Check List Items by default, go to Setup / Subsystems / Customer Type and modify the “Call Slip Invoice Defaults” and place check marks in the appropriate check boxes.

The screenshot shows the 'Customer Type' configuration window for 'COMMERCIAL'. It includes fields for 'Type Code' (COMM), 'Type Name' (COMMERCIAL), 'Data Type' (C), and 'Default Priority' (10000). There are several sections with checkboxes for various options:

- Labor
 - Show Hours
 - Show Rates
 - Show Amounts
- Flat Rate Descriptions
 - Show Flat Rate Prices
- Material
 - Show Prices
- Problem Reported

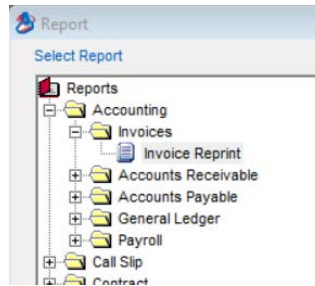
Resolutions section:

- Resolutions
 - Use Short Resolution
 - Use Long Resolution
 - Show Selected Equipment
 - Show Checklist
 - Suppress Blank Checklist Items
 - Show Equipment Location
 - Show Resolution Notes
- Miscellaneous

Buttons: Ok

Reports

A new report has been added that will allow you to reprint invoices based on your selection criteria. This is a great feature to use if your printer jammed, you forgot to print reports, you want to reprint all invoices for a particular customer, etc. This report is accessed from the Reports Menu. And you can choose to print Call Slip Invoices, Contract Invoices or Job Cost Invoices.



Several reports have new selection and/or sort options. Some of the reports that have added selection or sort options include:

- Deferred Income Aging Report
- Problem Code List Report
- Scheduled Calls Report
- Customer / Site List Report
- Flat Rate Comparison Report
- Call Slip Profitability Summary Report
- Call Slip Profitability Detail Report

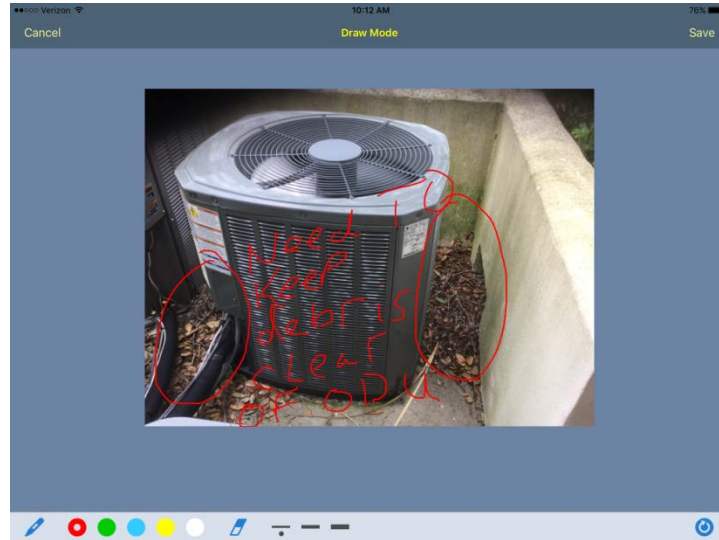
OnCall Module

The customer and site email addresses are now visible on the Customer Information screen.

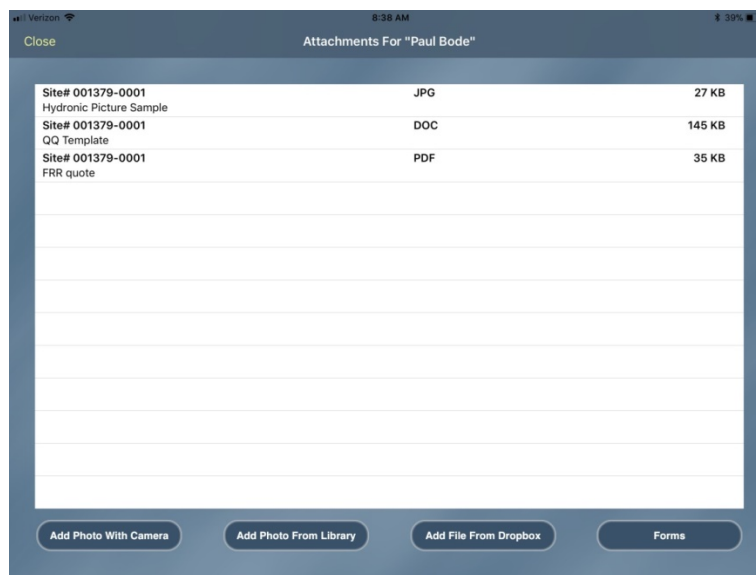
Nate Tuttle	Team Air Conditioning	Logout
ACOWIN ONCALL Team Management Systems Inc.		
Billing Information 001125 Smith, Sean 11451 Persimmon Court Ft. Myers, FL 33913 (239)455-9844 (239)465-3215 nate@teamservice.com; ted@teamservice.com	Site Information 001125-0001 Smith, Sean 11451 Persimmon Court Ft. Myers, FL 33913 (239)455-9844 (239)246-6723 sales@acowin.com	

ACOTRUCK

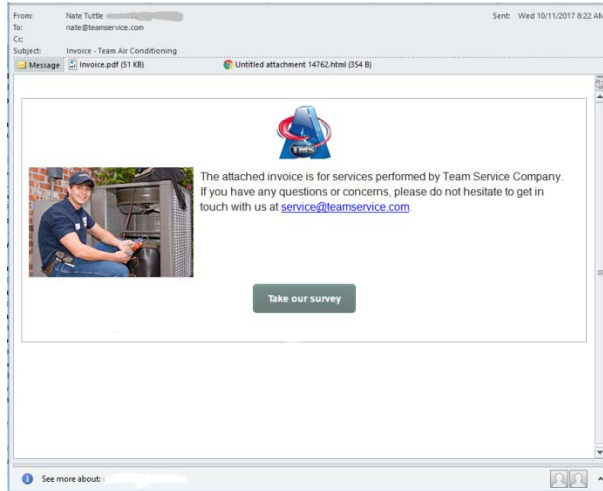
You now have the option to draw on pictures added in the field in ACOTRUCK. This will allow you to make notes, point out problem areas, etc. on the picture. The drawing feature is only available when adding a new picture from the field. If a picture has already been uploaded, you will not be able to draw on it.



A new feature has been added that allows you to view Site Attachments as well as add Site Attachments from the field. If you have a DropBox account setup, you can upload pre-defined editable PDF documents and open them from the new Site Attachments file and fill out the editable fields. When you save it, it will automatically save it to ACOTRUCK and upload it to the Site File when you Sync your call slip back to the office.



Ability to add custom e-mail text for emailing invoices and work orders, which can include logo and technician photo, as well as the ability to embed Review Buzz and Survey Square links in Work Orders and Invoice Email Text sent from ACOTRUCK.



Ability to automatically open ACORATE Flat Rate Reader from ACOTRUCK, select the repairs you want to recommend and automatically save them back to ACOTRUCK.

