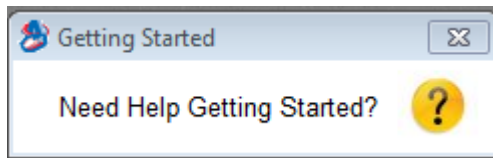


What's new in ACOWIN 5.0

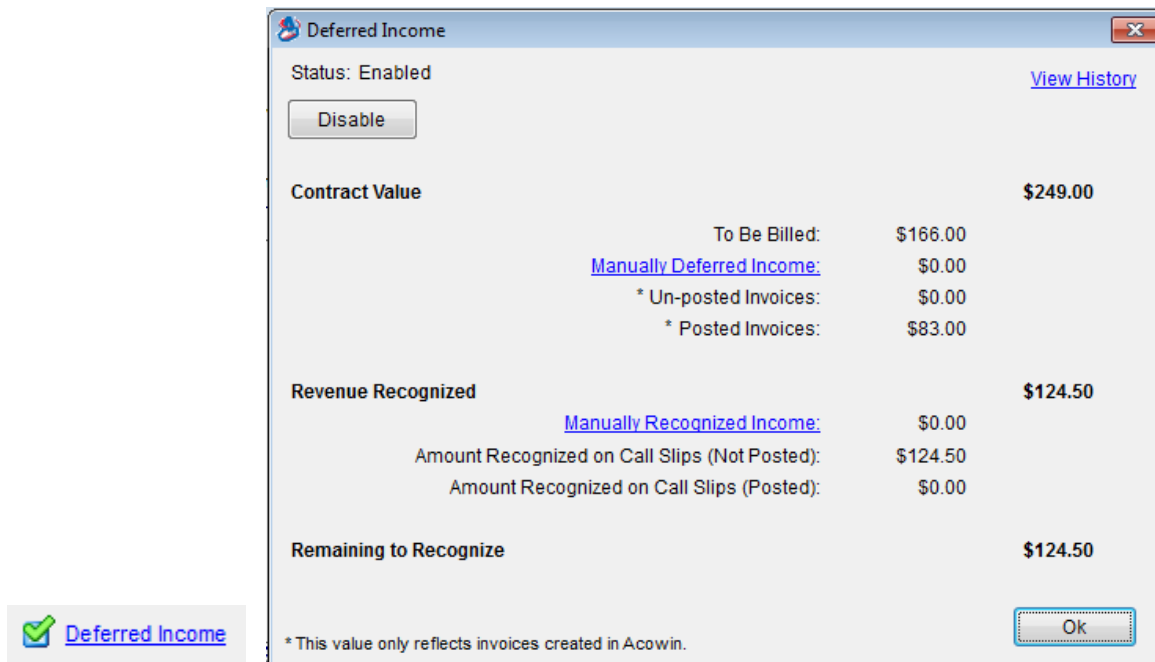
Following are the key features that have been enhanced, added to, or made available with ACOWIN version 5.0.

Getting Started – A new utility has been added to the main screen that says “Need help getting started?” Clicking this will automatically open up a “Getting Started Tutorials” web page that has the minimum tutorials that a new user should watch to understand how to navigate through ACOWIN and perform basic functions, such as how to use the Tool Bars, Search for Records, Adding Customers, Taking Service Calls, Dispatch Board Basics and more. There is also a link to take you to the full list of all the Tutorials available for the various ACOWIN modules. This is a great tool for helping new companies getting started or new employees to learn the basics of ACOWIN.



Contracts Module (Service Agreements)

- **Deferred Income** – A new streamlined Deferred Income feature has been added to ACOWIN in version 5.0. Simply mark a service agreement as “Deferred Income” and the system will automatically direct invoices to your Deferred Income Liability Account. When computer generated inspection slips are posted, the system will automatically relieve the Liability account (Debit it) and recognize the income (Credit it). The amount to recognize will automatically be calculated, but can be overridden if necessary and the system will automatically break out how much should be recognized as Labor vs. Material income based on your setup.



Code	Name	Cost Price	Sell Price	Sell CR	Sell DR
Deferred	Deferred Income	0.00	-124.50	2500	1200
Deferred	Deferred Income	0.00	112.05	4110	1200
Deferred	Deferred Income	0.00	12.45	4120	1200

- Automatic Credit Card Processing** – ACOWIN now gives you the ability to automatically process credit cards for Contract Invoices and creates the “Payment Received” when the credit card is approved. If you are using QuickBooks, the “Payment Received” will automatically be created in QuickBooks for you when the invoice is posted. The credit card numbers will be securely stored by an approved credit card processor and only an alias number will be stored in ACOWIN making it PCI compliant. Processing can be done for both Credit Card and ACH payments, where the balance comes directly from the customer’s bank account. Please note you must be using an approved credit card processing company to use this feature.

Contracts - Automatic Credit Card Processing

Invoices To Be Created | Invoices Need Posted | ACH Payments

Sort by: Expiration Date Get List

Chk	Site #	Customer Name	Contract #	Exp Date	Inv Date	Amount
<input type="checkbox"/>	001288-0001	High, Andy	001288-0001-002	2/13	03/01/2013	20.75
<input checked="" type="checkbox"/>	001148-0001	Beltz, Raymond	001148-0001-001	12/14	03/01/2013	20.75
<input checked="" type="checkbox"/>	001001-0001	Action Electric, Inc.	001001-0001-006	12/15	03/01/2013	20.75
<input checked="" type="checkbox"/>	001135-0001	Zoller, Jayson	001135-0001-003	12/15	03/01/2013	20.75
<input checked="" type="checkbox"/>	001272-0001	Osborn, Donald	001272-0001-001	12/15	03/01/2013	20.75
<input checked="" type="checkbox"/>	001294-0001	Osborn, William	001294-0001-001	12/15	03/01/2013	20.75
<input checked="" type="checkbox"/>	001307-0001	Jones, Mike	001307-0001-002	12/15	03/01/2013	20.75
<input checked="" type="checkbox"/>	001318-0001	Severson, Marcie	001318-0001-003	12/15	03/01/2013	20.75
<input checked="" type="checkbox"/>	001354-0001	Lanser, Cheryl	001354-0001-001	12/15	03/01/2013	20.75
<input checked="" type="checkbox"/>	001390-0001	Stauble, David	001390-0001-001	12/15	03/01/2013	20.75
<input checked="" type="checkbox"/>	001415-0001	Henessy, Erin	001415-0001-001	12/15	03/01/2013	20.75

This card has expired.

Totals are Less Tax 228.25

Print List Create Invoices Next

- Contract Invoice Credit** – An easier Contract Invoice Credit feature has been introduced making it faster and easier to credit a Contract Invoice. Simply click the Credit Invoice button in the contract file, select the invoice number from the drop down list, enter the date of the credit and click the Post Button. This will automatically credit the invoice, which will allow you to create a new invoice for a different amount, change the billing cycle, etc.

Credit Contract Invoice

Contract #: 001148-0001-001

Bill To: 001148
Beltz, Raymond

Site: 001148-0001
Beltz, Raymond

Invoice: C-1176

Invoice Amount: -22.00

Invoice Date: 01/15/2013

Resolution: Credit

Cancel Create and Post

Happy Calls – “Happy Call” tracking was introduced in ACOWIN version 4.92 and was a huge hit. ACOWIN 5.0 takes “Happy Calls” a step further and allows you to E-Mail or Print the “Happy Call Survey” for customer’s that do not want to make physical phone calls or are having a hard time reaching the customer by phone during normal business hours. If a “Happy Call” is e-mailed to the customer, they can click on a link in the e-mail that will allow them to electronically fill out the survey. When they submit the “Happy Call”, it will automatically update your ACOWIN system with their response. Responses to printed surveys that are returned can be entered in the customer’s file.

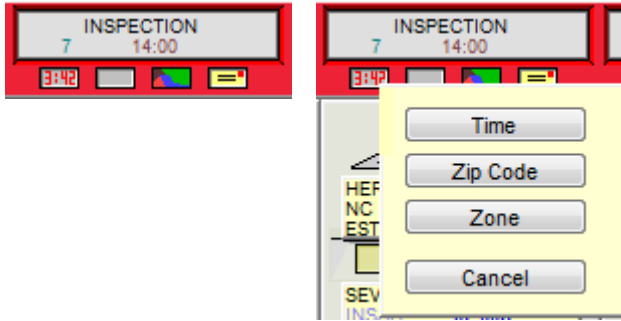
Customer Survey

Q1: When you contacted Team Service Company, was your call handled courteously and efficiently?
Rate: 1 = Poor 5 = Excellent

Q2: Did the technician arrive during the time frame promised?
Rate: 1 = Poor 5 = Excellent

Q3: How would you rate the technicians appearance and manner?
Rate: 1 = Poor 5 = Excellent

Automatic Purchase Order Creation – If you have a list of material to be used on a Call Slip and you need to issue a Purchase Order for some or all of the items, you can click the “PO From Call Slip” button on the Call Slip Material Screen and select a vendor and for which items from the list you want to generate a Purchase Order. You can select all of the items, some of the items or a combination of taking some from inventory and issuing a PO for the remainder. This is a great feature for those that are using the Quick Quote system. Now, instead of having to delete the items you don’t want to take from inventory and manually adding them to a Purchase Order, the system handles it automatically for you with a click of the mouse.



Future Work – A new “Future Work” file has been added to the system for tracking recommended work that has not been completed. If the technician is using ACOTRUCK and the customer declines a recommended Flat Rate repair, the declined repair will automatically create a “Future Work” record when the call is uploaded back to the office. If you are not using ACOTRUCK, then the recommended work on the hand written invoice that the technician turns in can be used to manually create a Future Work record. The next time a customer places a Service Call, the “Future Work” button will display the words in Red, indicating that there is Future Work associated with the customer’s site. The dispatcher can view the Future Work at that time and elect to include it in the Problem Text automatically if desired. A Future Work report has also been added under the Customer/Site reports menu.

 Black text indicates no Future Work is Present

 Red text indicates Future Work records exist

Future Work List

Site #: 001125-0001 Show: Open

Site Name: Smith, Sean

Description	Qty	Total Price	Date
▶ Electronic/Ultrasonic Leak Search 3 to 5 ton Split System - Easy	1	223.00	10/22/12
Electronic/Ultrasonic Leak Search 3 to 5 ton Split System - Easy	1	223.00	01/24/13

Add Delete Edit

Close

The screenshot shows a window titled "Future Work" with the following fields and values:

- Site #: 001125-0001
- Site Name: Smith, Sean
- Status: Open
- Status Reason: Declined on AcoTruck
- Status Date: 11/06/12
- Status User: NATE
- Created from CS #: 2547
- Dispatched Date: 10/19/2012
- Flat Rate Repair Code: LEK010010
- Tech: NATE
- Quantity: 1
- Follow up Person: NATE
- Sell Price: 223.00
- Follow up Date: 10/22/2012
- Total Price: 223.00
- Description: Electronic/Ultrasonic Leak Search 3 to 5 ton Split System - Easy

Buttons: Cancel, Apply

Dashboard Enhancements

- Dashboard** – The Dashboard now gives you the ability to select a specific Month and Year for which you want to view the Dashboard. In previous versions, it always showed the information for and through the current month. You can now select the particular month you want to view the information through.

The screenshot shows a dialog box titled "Select Date" with the following fields and values:

- Month: March
- Year: 2013

Button: Continue

- Automatic Credit Card and ACH Information** – Automatic Credit Card and ACH information has been added to the Dashboard. This includes such information as how many credit cards are expiring this month, next month and how many cards associated with active service agreements have already expired. The ACH sections show how many ACH payments have been submitted and the value, how many have been declined and the value, and how many have been accepted and the value, but still need to be posted. This information is very valuable since ACH payments are not processed and approved instantly like Credit Cards.

Auto CC		
Cards Expiring This Month		0
Cards Expired		1
Cards Expiring Next Month		0
ACH Status (As of Today)		
Ready		
Count		2
Value		41.74
Submitted (Pending)		
Count		1
Value		20.87

Declined		
Count		0
Value		0
Accepted (Needs Posted)		
Count		0
Value		0
Service		
Sales MTD		\$785
Cost MTD		\$173
Gross Profit		\$613
Accounts Payable Amt		\$200

Call Slip Word Merge – The Word Merge option has been added to the Call Slips file. This will allow you to make your own custom forms with information from the call slip file, such as material and labor details, sell prices, tax, totals and customer and site name and address information.

INVOICE

Team Air Conditioning
11928 Fairway Lakes Drive
Fort Myers, FL 33913

«invoicedate»
«invoiceno»

Bill To:

«billtoname»
«billtoaddr1»
«billtoaddr2»
«billtocsz»

Job Location:

«sitename»
«siteaddr1»
«siteaddr2»
«sitecsz»

Labor Detail:

Minimum Charge for first «minchargetime» hours is \$«minchargeamount»
«labordetail»

Material Detail

«materialdetail»

Labor	«totallabor»
Material	«totalmaterial»
Miscellaneous Charge	«totalmisc»

Project Management (Job Cost)

- **Job Cost Tech Time Entry Screen** - A new Technician Time Entry screen has been added allowing the ability to enter times for multiple jobs, phases and dates on one easy to use screen. This screen is designed to work like a time card, where all of the technician's time associated with Job Cost call slips can be entered at one time, typically from a hand written time card turned in by

installers. When the Tech Time Entry screen is saved, the system will automatically create the dispatch cards on the dispatch board for the appropriate dates and apply the hours and costs against the jobs.

Job Cost - Tech Time Entry Card

Tech: BOB Card #:

Job #	Base/Extra	Phase	Date	Tech Type	Dispatched	Arrived	Departed	
0904-0001	Base	Trim	03/08/2013	Tech1		02:00p	06:15p	Apply

Job #	Base/Extra	Phase	Date	Tech Type	Dispatched	Arrived	Departed	Total Hrs
0911-0001	Base	Rough	03/04/13	Tech 1	08:00a	08:30a	12:00p	4.0000
0905-0001	Base	Trim	03/04/13	Tech 1	12:30p	01:00p	05:00p	4.5000
0805-0001	Base	ABOVESLAB	03/05/13	Tech 1	08:00a	08:15a	01:00p	5.0000
0805-0001	Base	ABOVESLAB	03/05/13	Tech 1		01:30p	05:00p	3.5000
0603-0001	Base	PUMP	03/06/13	Tech 1	08:00a	08:15a	12:30p	4.5000
1112-0001	Base	Rough	03/06/13	Tech 1		01:00p	05:00p	4.0000
1112-0001	Base	Rough	03/07/13	Tech 1	08:00a	08:20a	11:30a	3.5000
1104-0001	Base	Rough	03/07/13	Tech 1	12:00p	12:25p	05:00p	5.0000
0904-0001	Base	Trim	03/08/13	Tech 1	08:00a	08:15a	01:30p	5.5000
0904-0001	Base	Trim	03/08/13	Tech 1		02:00p	06:15p	4.2500

Job Name: Wasik Install
 Site Name: Wasik, Matt
 Site Address: 17455 Overhill Drive

Total Hrs: 43.7500

Total TT: 2.4999
 Total RT: 39.9999
 Total OT: 1.2500
 Total DT: 0.0000
 Total TT + RT: 42.4998

Created by: Reg Time: 07:00a - 05:00p
 Created on: Over Time: 05:00p - 11:00p



- Job Cost Direct Charges** – A new screen has been added to the Job File that allows you to directly add costs to the Job without creating a Purchase Order, using a Call Slip or entering Dispatch Times. Direct charges can be applied to 3 different categories, Labor, Material or Miscellaneous Costs, to either the Base Contract or any Extra for the Job.

Job Cost - Direct Charges

Job # 1302-0001 Base / Extra Entire Job

Job Name Severson New Construction Description Entire Job

B/X	Extra #	Phase	Charge #	Date	Mat Cost	Lab Cost	Misc Cost	Total
B		Rough	4	03/03/2011	0.00	39.75	0.00	39.75
B		Multi	5	03/03/2011	53.00	0.00	265.00	318.00
B		Multi	7	03/12/2011	53.00	35.00	0.00	88.00

Add Detail

General Breakdown Extras Profitability PO's Invoices Call Slips Direct Charges

- Job Cost Miscellaneous Charges** – The ability to add Miscellaneous charges has been added to “Contract” type Job Cost jobs. Prior to this release, Misc. Charges could only be added to “Distribution and T/M” type jobs. You can now add as many “Misc. Charges” as you want to a job invoice and affect different G/L account numbers based on the Misc. Charge entered.

Misc Code Description GL Credit Taxable Non-Taxable Apply

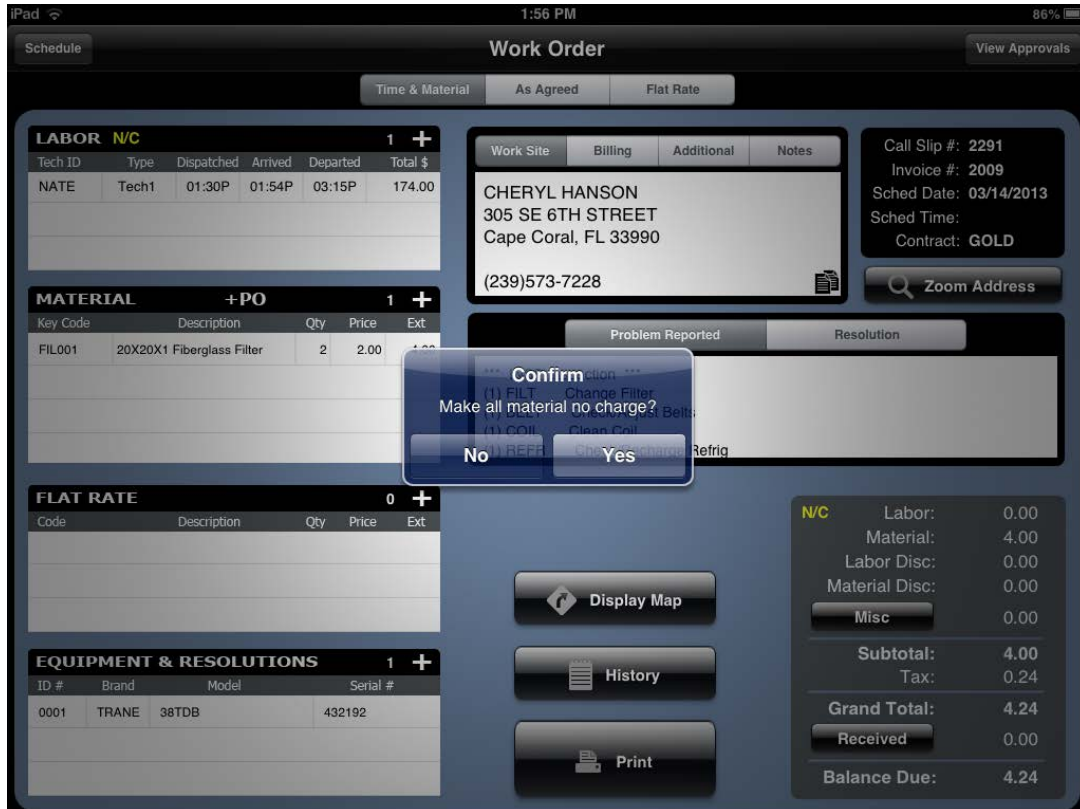
 Crane Rental 4120- - 0.00 500.00

Misc Code	Description	GL Credit	Taxable	Non-Taxable	Total
Freight	Freight Charges	5000- -	0.00	125.00	125.00
Crane Rental	Crane Rental	4120- -	0.00	500.00	500.00
		Totals:	0.00	625.00	625.00

Add Delete Close

ACOTRUCK (Add On Module)

- **Instant No Charge Labor and/or Material** – This version now allows you to instantly make all Labor and/or Material on a Call Slip in ACOTRUCK “No Charge”. If using the iPad version, simply tap the word Labor or Material above the respective sections on the Work Order screen and you will be prompted if you want to “Make all Labor (or Material) No Charge”. Tapping the heading again will prompt if you want to “Remove the No Charge for Labor (or Material)”. If using the Windows Tablet PC version, click the No Charge button and select Labor and/or Material from the popup window. Prior to this release, you would have to go into each individual line item and make them No Charge. This feature allows you to make all of a section No Charge instantly.




ACOTRUCK Attachments – an exciting new feature has been added to ACOTRUCK which allows you to view documents and images attached to the call slips in the History as well as the ability to add pictures to the Equipment File and/or view previously attached images to various pieces of Equipment.

- **History Attachments** – If there are any attachments associated with any of the Call Slips that appear in the History, you will be able to click the attachment button and view a list of the various attachments. A simple tap of the item will allow you to download the attachment from the ACOWIN server and allow the technician to view it in the field. Imagine being able to see the actual invoice that the customer signed or a Flat Rate Approval where the customer declined a recommended repair, and be able to show it to the customer in the field.

iPad 2:18 PM Not Charging

Attachments For "Paul Bode" Attachment "Cs# 2443 - Flat Rate Approval from AcoTruck" E-Mail / Print



Team Air Conditioning
 11928 Fairway Lakes Drive
 Ft. Myers, FL 33913
 (239)437-8898 Fax: (239)437-9088
 TC-1234567890

Proposed Work Approval

09/26/11
Page 1

Paul Bode
12465 Country Day Cr
Ft. Myers, FL 33913

Paul Bode
12465 Country Day Cr
Ft. Myers, FL 33913

Call Slip Number	P.O. Number	Invoice Date	Invoice Number
2443		09/26/2011	S1878


Repair Num	Description	Qty	Unit	Extended	APPROVED	DECLINED
Diag	Diagnostic Fee	1	129.00	129.00	****	
BLW010045	Replace 3/4 HP Variable Speed Motor Module	1	567.00	567.00	****	
LEK010025	Electronic/Ultrasonic Leak Search 6 to 7.5 ton S	1	451.00	451.00		****
TST010010	Install Programmable Thermostat	1	385.00	385.00	****	

Approved Work Amount: 1081.00


- Equipment Attachments** – You can now attach photos and/or view previously attached photos to a piece of Equipment in the field. If you are using an iPad or iPhone, you can actually take a picture with the device and attach it automatically. If you are using a Windows Tablet PC, you can take a photo, save it to the hard drive and then attach it. When the call is synced back to the office, the picture(s) will be automatically attached to the equipment file for future viewing.

iPad 1:28 PM 89%

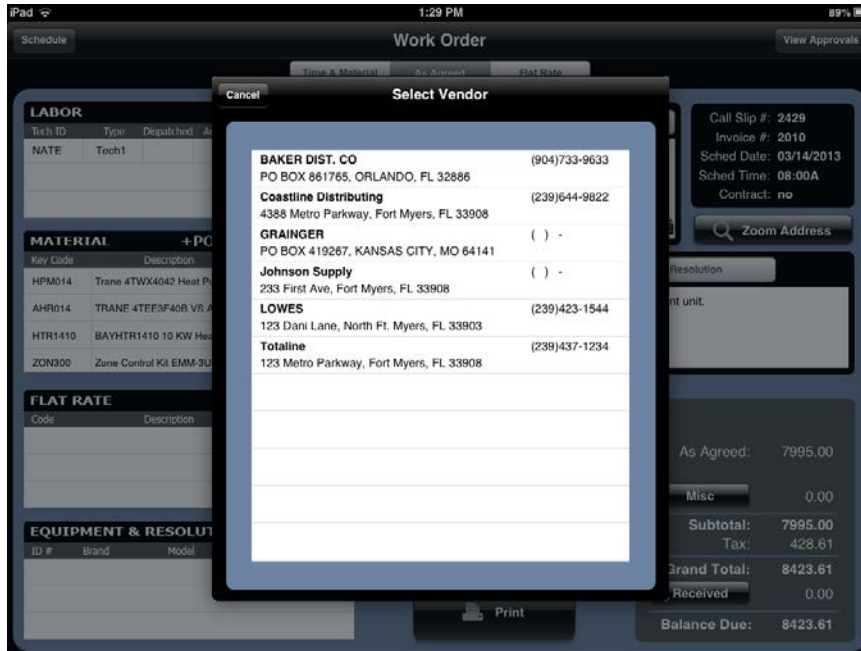
Cancel Description Save



Enter a description for this image:



- Adding a PO from ACOTRUCK** – You now have the option of giving your technicians the ability to add a Purchase Order from ACOTRUCK. If you elect to allow a technician to add a PO from the field, they will be able to choose from a pre-defined list of vendors and simply choose the vendor they want from a drop down list. ACOTRUCK will then connect with the server at the office, create a Purchase Order and return the PO number to ACOTRUCK. The technician can then enter items against the PO number and enter their costs. When the call slip is synced back to the office, the items will be added to the PO and automatically posted against the service call. Of course allowing the technician to add a PO from the field is completely optional based on your company's needs and desires.





ACOWIN OnCall & All New InterCall (Add On Module)

- ACOWIN OnCall** is an add on module that was introduced in version 4.92 and it allows employees to look up customers after hours and view basic customer information, equipment on site, history and allows the ability to add a new service call directly over the Internet. This feature has been enhanced to allow the ability to add a new customer if they are not already in your ACOWIN system. The system will verify that the address entered does not actually exist in ACOWIN already, helping to minimize the possibility of adding the same customer multiple times. Once the new customer has been added, a call slip can be created that will automatically be marked for the technician to download to ACOTRUCK.

Nate Tuttle Team Air Conditioning [Logout](#)

ACOWIN OnCall
Add Customer

Customer Type: RESIDENTIAL ▾

Company Name:

First Name:

Last Name:

Address 1:

Address 2:

City, State, Zip:

Phone:

Cell Phone:

- InterCall** - InterCall allows your customers to create their own Call Slips over the Internet. These service requests are instantly relayed to your dispatch board and assigned to a pre-determined column. You can define what days of the week that customers can schedule their calls (eliminating customers from scheduling calls on Saturday and Sunday as well as dates listed in the Holiday Calendar for example), and determine what time you stop accepting calls for the current day. Customers will be able to choose if they prefer AM or PM and can also review their service history (as in what they saw on the printed invoice) online for each of their sites. You can even define an e-mail address so that when a service call is placed via InterCall someone from your organization can be instantly alerted via e-mail.

InterCall

Team Air Conditioning

Site No: 001125-0001
 Site Name: Smith, Sean
 Site Address: 11451 Persimmon Court
 Ft. Myers, FL 33913
 Phone: (239)455-9844

	CS#	Contact	Date	Tech	Status	Problem
Click	2621	Sean Or Courtenai	03/14/13	INSPECTION	SCHED	Inspection
Click	2605	Sean Or Courtenai	01/21/13	NATE	A/R	No Cooling
Click	2598	Sean Or Courtenai	12/28/12	NATE	A/R	No Cooling
Click	2597	Sean Or Courtenai	12/28/12	INSPECTION	SCHED	Inspection
Click	2596	Sean Or Courtenai	12/28/12	NATE	MAT	Inspection
Click	2592	Sean	12/27/12	BOB	LAB	No Cooling
Click	2578	Sean Or Courtenai	11/23/12	NATE	A/R	No Cooling
Click	2572	Sean Or Courtenai	11/14/12	NATE	A/R	Electrical Problem
Click	2548	Sean Or Courtenai	10/11/12	BOB	SCHED	No Cooling
Click	2547	Sean Or Courtenai	10/19/12	NATE	MAT	No Cooling

Site List
Add Call Slip

List of Service Calls previously performed. Clicking the blue button on the left will display history for the selected service call.

Intercall

Team Air Conditioning

Site Name: Smith, Sean
 Site Address: 11451 Persimmon Court
 Ft. Myers, FL 33913

Phone: (239)455-9844
 Contact: Sean Or Courtenai
 PO#: [Redacted]

Team Service Company is proud to offer you our services. Thank you for your business!

Please Note - We will do our best to accomodate your Preferred time, but cannot guarantee it. A customer service representative will contact you as soon as possible about your service request.

Preferred Time: Tue, Mar 19 afternoon ▾
 Problem Code: Heat Problem ▾
 Additional Notes: Cold air is blowing out of the vents

Submitting a call can take a moment. Please be patient and refrain from refreshing or clicking back in your browser.

New Service Call Submission Screen.

Intercall

Team Air Conditioning

Site Name: Smith, Sean
 Site Address: 11451 Persimmon Court
 Ft. Myers, FL 33913

Your call slip has been submitted:
Call Slip #2632

Verification Screen after customer submits service call via InterCall

New Reports:

- **PO Balance Report** - The Purchase Order Balance Report will give you a list of all purchase orders that fall within the search criteria and shows you the original Purchase Order value, the received value amount and if you are using QuickBooks, the Billed To Date (BTD) amount.
- **Credit Card Expiration Report** - The Purchase Order Balance Report will give you a list of all purchase orders that fall within the search criteria and shows you the original Purchase Order value, the received value amount and if you are using QuickBooks, the Billed To Date (BTD) amount.
- **Future Work Report** - The Future Work Report prints a list of Future Work entries. Future work entries are generated automatically when a technician uploads a call slip from ACOTRUCK that had suggested flat rate repairs declined. Future work records can also be created manually.

- **Deferred Income Report** - The Contract Deferred Income Report shows you a summary list of all the contracts that have been defined as deferred income and the remaining deferred dollar value. You have the option to only show contracts that have a remaining amount to recognize greater than zero, and/or only contracts that have expired.
- **Deferred Income Aging Report** - The Deferred Income Aging Report will list all open contracts that have been defined as Deferred income and show the value of the contract, how much has been billed, how much revenue has been recognized and the balance. This report can be used to reconcile your deferred income.
- **Employee Leave Report** - This report reads the Leave data from the Employee File to produce a record of the dates and times that an employee was recorded on leave. The total leave time is displayed by employee as well as grand totals for all employees on leave during the criteria selected.
- **Job Cost Profit Detail Report** - This report provides a breakdown of labor, material, and miscellaneous costs for each Phase of the selected Jobs. The actual costs incurred to date are compared to the estimated costs in each category, and a percentage of completion is calculated. Subtotals are provided for each phase, as well as for the overall Job. This report breaks out the base contract and each Extra separately. This is a good report to audit how a job or phase within a job or extra arrived at the costs shown.