

What's New In Acowin 4.8?

Quick Quotes: Acowin 4.8 introduces the Quick Quote screen, which allows you to easily prepare an estimate in advance, and create a Call Slip when the customer agrees to have the work performed. You can include labor and materials in your estimate, and prepare a sale price using Time & Material, As Agreed, or Flat Rate billing methods. The Quick Quote system includes a Diary, Attachments, and Microsoft Word merge letters – perfect for creating quotes and proposal letters! The Quick Quote option appears on the Acowin Main Menu, to the left of the Customer/Site File.

The screenshot displays the 'Quick Quote' window with the following details:

Site Information:
 Site: 001045-0001 | Status: Sold
 Name: Barzzini, Juliana | Quote #: 10
 Address: 6587 Coastal Lane | Call Slip #: 1341
 Ft. Myers, FL 33919 | Has Contract: Yes

Bill To:
 Name: Barzzini, Juliana
 Contact: Arthur Poole
 Phone: (415)888-9598

Labor Summary:

	Tech	Helper	Super	Estimate	Discount	Est w/Discount
Hours	8.00	8.00	8.00	1360.00	0.00	1360.00

Material Table:

Location	KeyCode	Name	Qty	List Cost	Src	Sell Price	Extended
MAIN	SHT001	sheet metal, sq ft	10	9.45	R	33.08	330.80
TR001	BAG002	Bag for leaf blower 38ODC	1	0.00	R	0.00	0.00
TR004	DCON002	Disc, Concrete, 6' x 3"	1	85.00	R	212.50	212.50
MAIN	BAG002	Bag for leaf blower 38ODC	1	0.00	R	0.00	0.00
MAIN	FERT001	fertilizer package	2	0.00	R	0.00	0.00

Summary:

	Estimate	Discount	Est w/Discount
	560.80	0.00	560.80

Advanced Info:
 Use Labor and Material
 Enter Amount Manually
 Use Flat Rate

Cost Summary:

Flat Rate	2055.39
Misc	22.95
Sub Total	2078.34
Tax	123.32
Grand Total	2201.66
Est GP \$	1156.97
Est GP %	55.66

Buttons: Status Change, Quote Details

Revised Call Slip screen: The first screen of the Call Slip has been extensively revised, using the same clean, friendly style as the new Quick Quote screen. The customer aging has been moved to the bottom-right corner of the screen, and is presented in a more readable format. Many of the less commonly-used fields have been moved to an Advanced screen, accessed with a button below the Site Notes. The

status indicators for Credit Hold, COD, and the presence of a Contract have been changed into colorful icons beneath the Contract ID.

The screenshot shows the 'Call Slip' window with the following details:

- Site Information:** Site: 001000-0001, Name: Abe's Lock & Key, Address: 6845 Ocean View Rd., Bayshore, CA 94326-
- Bill To:** 01000, Name: Abe's Lock & Key
- Contact:** Abraham J. Williams, Phone: (415) 555-4411
- Contract:** [Field with icons]
- Problem Codes Table:**

Code	Problem Name	Est Time Req
CC	Clean & Check	01:00
- Financial Summary:**

Current	1989.46
1 - 30	0.00
31 - 60	0.00
61 - 90	0.00
> 90	655.27
Total	2644.73

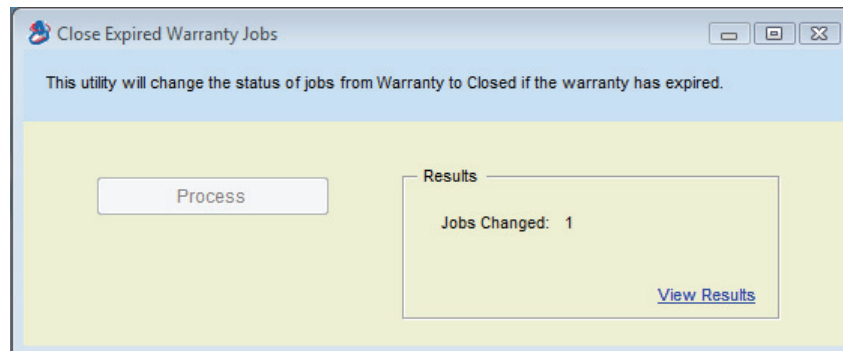
Salespersons Per Call Slip: As part of the Call Slip screen enhancement, the Advanced pop-up window includes a Salesperson field. This allows you to over-ride the standard Service salesperson from the Billing screen of the Customer/Site File.

New Diary: The Diary alert window has been expanded to include the new Quick Quotes diary.

The 'Diary' window shows the following structure:

- View My Entries [Refresh](#)
- View Everyones Entries
- Tree View:
 - JobCost (4)
 - Contract (4)
 - Customer (1)
 - Site (2)
 - Company (3)
 - Dispatch (6)
 - Quick Quote (2)
 - 9 (Yellow smiley icon)
 - 13 (Green smiley icon)

Job Cost Warranty Expiration Utility: On the Company Utilities menu, you will find a new option called Close Expired Warranty Jobs. This utility will change every Job with an expired Warranty back to the Closed status. The original warranty expiration date is preserved, so you can still run accurate reports based on this date. After you process the warranty expirations, you can click the blue View Results hyperlink to generate an Excel spreadsheet of the warranties that have expired.



New Export to Excel Feature: Every Acowin report now includes a button on the Preview screen, called "Export to My Docs." Clicking this button will create a carefully formatted spreadsheet based on the report, and save it to the My Documents folder associated with your Windows user name. Better yet, the system will automatically launch Microsoft Excel and display this spreadsheet for you. Since these exported spreadsheets are based on the raw data used in compiling the report, they often include information that was not actually printed on the report.

New Reports: Several of the Call Slip reports have been modified to include options for including or excluding Call Backs and Warranty calls. Call Slips can be designated for Call Back or Warranty on the new Advanced pop-up window of the redesigned Call Slip screen. Among the reports enhanced with this new selection option:

- Call Slip Summary Report
- Call Slip Profitability Summary and Detail
- Salesperson Profitability Summary and Detail
- Print Call Slips
- Technician Profitability Summary and Detail
- Customer History Report

Also, some new reports have been added for the Quick Quotes system:

- Estimate Detail Report
- Status Report
- Estimate vs. Actual Report
- Estimate Aging Report
- Closing Ratio Report

Other report enhancements: The Purchase Order Quantity report now has an option to include the cost of each listed item. The Scheduled Calls Report now includes both sort and selection options for Zone.

Enhanced Dashboard Display: A summary of Quick Quote information has been added to the Dashboard display.

Modified Call Slip Packing Lists: You can now include the inventory Location for each item on the Call Slip Packing List, produced by clicking the Printer button on the Call Slip screen.

Inventory Labels: You can now print Dymo Label Writer labels directly from the Inventory screen, by clicking the Printer button.

Company Name Display: The title bar of the main Acowin window will now display the name of the company you're working in. This should help users with multiple companies remember which one they have open, at any given time.

AcoTruck Flat Rate Approvals: AcoTruck users will find a new Approval button beneath the Flat Rate area, when a Call Slip is set for Flat Rate billing. Clicking this button opens a screen listing the Flat Rate repairs, plus an area to capture the customer's signature. A form including the repairs and signature can be printed and given to the customer. Custom acceptance text can be added by creating an entry in the Setup / Subsystems / Footers file in Acowin, named "TMSFLAT." This Footer is automatically added to the Flat Rate Approval forms, after the technicians update the Static Information in their tablets.

Flat Rate Approval Screen

Larry's Landscaping & Garden 105 West Main Street Bayshore, CA 94326 (415)555-4567 Fax: () -	Bill To: Jacint Tumacder 143 Bay View Dr East Bayshore, CA 94327	Work Site: Jacint Tumacder 143 Bay View Dr East Bayshore, CA 94327
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Repair #	Description	Qty	Sell	Extended	Approve	Decline
GEN00001	General Diagnostic	1	75.00	75.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CHM010000	Replace "Timesaver" Combustion Chamber - Easy	1	208.19	208.19	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DRI010010	Replace 1/2 " Liquid Line 8 Cubic Inch Drier - Flare	1	86.84	86.84	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Your signature on this form indicates acceptance of the proposed repairs and billing indicated above. Please ask your service representative to review any questions you might have about these repairs.

370.03

Authorized Signature

Ok

Service Agreement Calculator Integration: A new button has been added to the Customer/Site File, which will export the selected Customer and Site to the TMS Service Agreement Calculator. To use the exported information, add a new Contract in the Service Agreement Calculator, then click the Import From Acowin button. For further information and pricing on the Service Agreement Calculator, please contact your TMS sales representative.

 This button appears in the lower-right corner of the Customer/Site File screen.