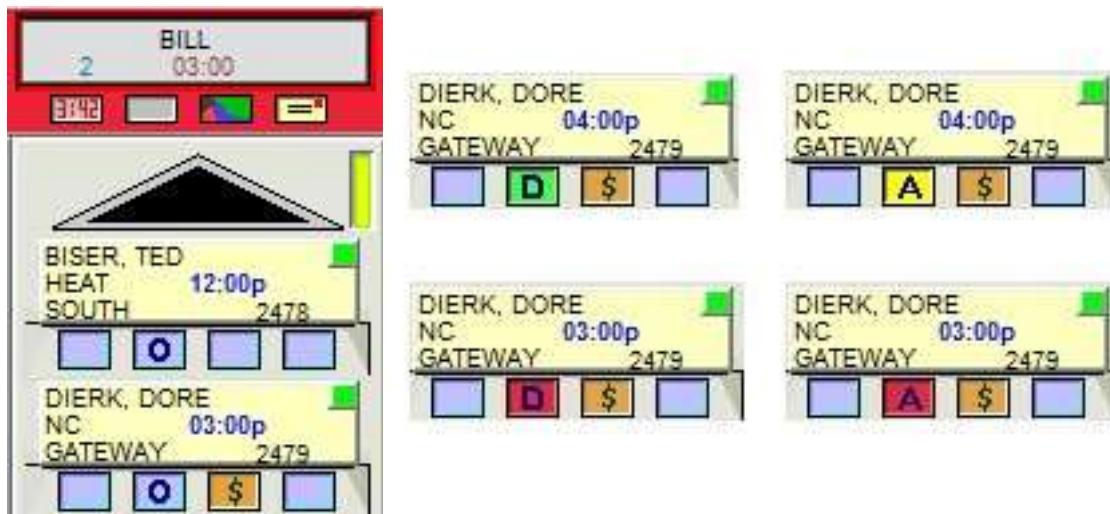


What's New In Acowin 4.92?

Number of Scheduled Calls and Estimated Hours: At the top of each technician's column, you will now see the number of scheduled calls the tech has as well as the estimated number of hours the calls should take. The estimated time at the top of the techs column will decrease based on the amount of time that a tech has been on a call until the time has been exceeded for the call. At that point in time, the dispatch status will change from a Green (D - Dispatched) or Yellow (A - Arrived) background to a Red background.



Green Schedule Card on Dispatch Board - If a call slip has been scheduled for more than one technician, date or time, the color of the card on the dispatch board will now be light green. This instantly alerts the dispatcher that there is more than one visit associated with the call slip.



Technician KPIs - Technician Key Performance Indicators have been added to the dispatch board by simply right clicking the technician's name at the top of the column and clicking the KPI button. The Technician Key Performance Indicators measure how the technician is performing in various areas and gives important information such as estimated vs. actual time on calls, how much has been billed vs. how much has been collected, average revenue per hour, how the estimated flat rate hours compare to actual dispatch hours, how many service agreement opportunities the technician had, their service agreement closing rate, how many call backs against the technician, and more.

Key Performance Indicators				
Tech: NATE		Date: 12/12/11		
Total Technician KPI Review				
	Total	Service	Inspection	Job Cost
# Open Visits:	0	0	0	0
Est Time of Open Visits:	0:00	0:00	0:00	0:00
# of Completed Visits:	5	4	1	0
Est Time of Completed Visits:	11:30	9:30	2:00	0:00
Actual Time of Completed Visits:	8:11	6:41	1:30	0:00
Variance of Est vs Actual Time:	3:19	2:49	0:30	0:00
* Billable Amount of Non Posted Calls:	1046.39	1046.39	0.00	0.00
* Billable Amount of Posted Calls:	0.00	0.00	0.00	0.00
* Total Billable Amount:	1046.39	1046.39	0.00	0.00
* Amount Collected on Site:	0.00	0.00	0.00	0.00
* Variance of Billable vs Amount Collected:	1046.39	1046.39	0.00	0.00
* Total Billable Amount Less Tax:	1023.05	1023.05	0.00	0.00
Total Dispatch Time:	8:11	6:41	1:30	0:00
* Average Revenue per Worked Hour:	125.02	153.07	0.00	0.00
# of Call Backs:	0	0	0	0
Call Backs Against this Tech:	0	0	0	0

Flat Rate Details:	
# Flat Rate Calls:	2
* Flat Rate Amount Billed:	620.00
Total Dispatched Time:	4:15
Estimated Flat Rate Time:	2:25
Time Variance:	1:50
* Flat Rate Amount Billed Less Tax:	603.89
* Average Revenue per Actual Hour:	142.09
* Average Revenue per Estimated Hour:	249.95

Service Agreement Opportunities:	
* #S/A Opportunities:	3
* #S/A Opportunities Sold:	1
* % of S/A Opportunities Sold:	33%

* Tech to Whom Minimum Charge Has Been Assigned.

Happy Calls: Happy Call Tracking has been added to the system and can be accessed directly from the dispatch board. This incredible feature allows your CSR's to read from a pre-defined script and enter your customer's answers from a list of questions defined by your company. A Happy Call Report can be generated to show you the percentage of positive and negative responses for each of the "Happy Call" questions. A visual indication on the Dispatch Board will indicate if the "Happy Call" needs a follow up. The visual indications include a Green happy face that indicates a "Happy Call" was placed and the questions were answered with no need for future follow up. A Yellow face indicates that a "Happy Call" was attempted but the CSR was unable to contact the customer. A Red "X" indicates that the customer refused to answer the "Happy Call" questions. And an orange face indicates that the "Happy Call" was placed and that the customer would like a follow up call, typically from a manager.



Green happy face indicates a “Happy Call” was placed and the questions were answered with no need for future follow up.



Yellow face indicates that a “Happy Call” was attempted but the CSR was unable to contact the customer.



Red “X” indicates that the customer refused to answer the “Happy Call” questions.



Orange face indicates that the “Happy Call” was placed and that the customer would like a follow up call, typically from a manager.

Call Slip Screen – Several exciting new features have been added to the Call Slip Screen giving the CSR even more valuable information instantly when taking a new service call.

Call Slip

Site: 001125-0001
 Name: Smith, Sean
 Address: 11451 Persimmon Court
 Ft. Myers, FL 33913

Bill To: 001125
 Name: Smith, Sean

Contact: Mary
 Phone: () - ()
 (239) 455-9844

Source: NEWS
 PO #
 Email: info@michaelbonsbyvac.com

Contract:

Problem Codes

Code	Problem Name	Est Time Req
NC	(Site Notes) No Cooling	01:30

Total Est Insp/Prob Time: 01:30
 Adjusted Est Time: 01:30

Description

*** NC-No Cooling ***
 System is not blowing any air and making a strange noise from ODU.

Site Notes

Personal friend of the owner. Must go through the back gate to enter Gateway Subdivision. Dog is friendly. All inspection CS are not invoiced. Need 2 story ladder.

Next inspection in March 2012

Call Slip: 2483
 Type: Call
 Status: MAT
 Recent: 4

Zone: Gateway
 Priority: STANDARD
 Tech: NATE

Sched: 12/27/2011 09:00a
 Range: 12/27/2011 11:00a

Current	0.00
1 - 30	593.00
31 - 60	35.00
61 - 90	0.00
> 90	0.00
Total	628.00

Advanced Equipment

General Times Res Codes Labor Materials Flat Rate Invoice Profitability History Status Change

Month & Year of Next Inspection - Directly below the Site Notes / Things to Check section, the call slip will now display when the next inspection should take place. If the inspection is close, then the dispatcher can decide if they want to generate the inspection slip so that the tech can perform both the inspection and demand service call at the same time.

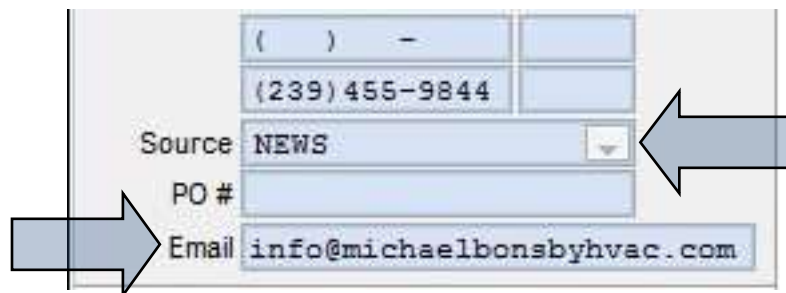
Advanced Next inspection in March 2012 Equipment

of "Recent" Calls - On the top right hand side of the Call Slip you will notice a new field called "Recent" with a number after it. This is the number of "Recent" call slips that have been created for this site, alerting the dispatcher if there may be a problem if there are too many recent calls generated. The "Recent" field can be defined between 1 and 12 months in the system setup. So for example, if you set your recent to 2 Months and it shows you have 4 calls in your Recent field, the dispatcher may want to investigate further to find out if it is a reoccurring problem or if that many calls are legitimate.

Call Slip: 2483
 Type: Call
 Status: MAT
 Recent: 4

Source Field Can be Made a Must Fill Field - You now have the option of making the "Marketing Source" field a must fill field, so that the dispatcher is required to enter something in that field before being able to save a new call slip. This is done in the Setup System under Miscellaneous Settings.

Site E-Mail Address on the Call Slip Screen - If you have an e-mail address for the site, it will appear in this field for verification or editing. If you do not have the e-mail address for the site, it can be added on the fly. This field will also be used to send a Technician Biography to the customer prior to the technician arriving at their site (see the information about Tech Bio later in this document).



A screenshot of a software form for a call slip. The form contains several fields: a phone number field with "(239) 455-9844", a "Source" dropdown menu with "NEWS" selected, a "PO #" field, and an "Email" field with "info@michaelbonsbyhvac.com". Two blue arrows point to the "Source" and "Email" fields respectively.

Service Agreement Opportunity Tracking: If you create a service call for a site that doesn't have an Active Service Agreement, the system will automatically mark it as a Service Agreement Opportunity. If the technician sells a service agreement on the call, the office can mark it as such, which will track how many Service Agreement Opportunities there were, how many were sold and the closing percentage. This information will appear in the Technician KPI Screen, Technician KPI Report and the S/A Opportunities Report.



A screenshot of a dialog box titled "S/A Opportunity". It displays the following information: "Call Slip #: 2466" and "Site Name: Wasik, Matt". Below this, there are two checkboxes: "S/A Opportunity" (checked) and "S/A Sold" (unchecked). At the bottom of the dialog, there are two buttons: "Cancel" and "Apply".

Call Back Technician: In addition to being able to mark a call slip as being a call back, you can now track who the original technician for whom was responsible. When marking the call as a call back, simply select the offending technician from the drop down list. This information can be seen in the Technician KPI screen and can also be used when running the Technician Profitability Reports.



Group Field

Call Back Orig Tech

Warranty

Technician Biography - If you have the optional e-mail / Paging module, you will now be able to e-mail a Technician Biography to the customer prior to the technician's arrival. The Tech Bio can include information such as your Company Name, Address & Phone Number, Logo, Call Slip Number, Scheduled Time Range (optional), information about your company, a picture of the technician as well as the tech's name and a brief biography about the technician which can include both company achievements as well as personal traits. What a great way to introduce your company and the technician to your customer before they ever arrive.

Team Air Conditioning

11928 Fairway Lakes Drive
Ft. Myers, FL 33913
[\(239\)437-8898](tel:2394378898)

Scheduled Technician Profile

Nathan Tuttle



Nathan Tuttle, a NATE Certified HVAC technician with our company, will soon be arriving at your requested location to meet your Comfort System repair needs. Nathan has successfully completed extensive HVAC certifications and has passed all given motor vehicle, drug and background screenings. You can trust Nathan to take care of your comfort needs in a professional and courteous manner! If you have any questions about your appointment, or if you need to make a change, please call [239-437-8898](tel:2394378898). We look forward to serving you.

ACOWIN OnCall (Add On Module) - ACOWIN OnCall will allow technicians to look up existing customers in ACOWIN over the internet and view important information such as: site details, if they are on Credit Hold or COD, their Site and Customer address information, if they have a contract and when it expires (as well as any contracts they had in the past that have expired), view the customer's equipment details (including individual equipment history) and overall site history. Based on permissions, the technician can even add a new service call in the field that will automatically add it to the Dispatch Board. It can even assign the call to the technician and mark it for downloading to ACOTRUCK. This is an incredible tool for after hours and weekend calls and is a great companion to ACOTRUCK (although ACOTRUCK is not required).

The screenshot shows the ACOWIN ONCALL interface for a customer named Sean Smith. The interface includes a header with the user's name (Nate Tuttle), team (Team Air Conditioning), and a Logoff link. The main content area is divided into Billing Information and Site Information, both showing the same address: 11451 Persimmon Court, Ft. Myers, FL 33913, with phone number (239)455-9844. Below this, it indicates the Customer Type is RESIDENTIAL, P.O. Required? is no, Credit Hold? is no, and COD is no. A table lists contract types, with columns for Contract Type, Start, Expires, and Expired. The table shows four contracts, all of type GOLD, with the last three marked as expired. Site notes mention the customer is a personal friend of the owner and provide access instructions. At the bottom, there are buttons for Equipment List, Site History, Add Service Call, and Return.

Contract Type	Start	Expires	Expired
GOLD	06/07/11	06/06/12	
GOLD	06/07/10	06/06/11	X
GOLD	02/20/08	02/19/09	X
GOLD	02/20/07	02/19/08	X

New Reports

- **Happy Calls Report** - This report reads the responses to the Happy Calls and compiles a "Report Card", showing you the percentage of positive and negative responses for each of the Happy Call questions.
- **Site Calls (High Call Slip Volume) Report** - This report is designed to alert you of possible potential problem sites based on a high call slip volume over a specific Date Range.
- **S/A Opportunity Report** - The Service Agreement Opportunity Report shows how many service agreement opportunities you had for a given time period and how many were actually sold based on both number and percentage.
- **Technician KPI Report** - This report provides important Key Performance Indicators to determine how well technicians are performing.

- **Contract Customer Labels** - This report prints mailing labels (that can be exported to Excel) based on various data in the Contract (Service Agreement) file.
- **Lead Technician Profit Report** - Unlike the regular Technician Profit Reports that automatically distribute income and costs between all of the technicians dispatched, the Lead Technician Profit Report provides overall income, cost and profitability for the call slips worked by the selected Lead Technician.
- **Employee Leave Report** - This report reads the Leave data from the Employee File to produce a report of the dates and time that an employee was recorded on Leave.