

Ascente 3.7 Enhancements/Fixes

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SPECIAL NOTES:

Ascente 3.7.x requires a server running Windows 2003 or Windows 2008. Windows 2000 is no longer supported.

Ascente 3.7.x will be the last version support on SQL 2000 and SQL 2005. The next major version of Ascente will require a server running SQL 2008.

Job Cost users should go into Job Cost, Maintenance, Cost Group and set the Sales Category for all Groups to be something other than (none) PRIOR to the installation of Ascente 3.7... (none) will not be allowed in Ascente 3.7. The system will automatically set all Cost Groups to 'Labor' if set to (none) at installation time. The installation will automatically set all Cost Codes that have (none) as the Sales Category to have the Sales Category of the Cost Group assigned to the Cost Code.

The installation program for the Teletrac Interface program (VBTele) will only run on Windows 2003 or Windows 2008 servers. This program has been replaced by AscenteGPS. This will need to be installed at the same time Ascente 3.7 is installed.

.NET 4.0 must be installed on the Server for the new AscenteDownload.exe program to work. The AscenteSetup.exe program will install .NET 4.0, but note that this can take quite a while to install if needed.

The Sales Analysis Service Invoice History reports have been changed to print the Resolution (Work Order Descriptions). This requires SQL 2008 AND the Ascente database to be set in SQL 2008 compatibility mode.

Ascente 3.7 Enhancements/Fixes

Enhancements

General

- On-line Help (F1) has been updated to include all of the features described in this document.
- Completed the following changes to the CreateViews.sql script:
 - Added a new JobCostDetailItemHistoryView
 - Added a new ServiceDetailItemHistoryView
 - Added a new ItemDetailUsageHistoryView (Combination of the above two views)
 - Added a new MarketingInfoView
 - Added a new CopyToDefView
 - Changed the JobsiteComponentView to include the Customer Attention field
 - Changed all of the views to no longer have an ORDER BY command, as this doesn't work. Also it was causing errors under SQL 2000.
 - Rewrote the MarketingSvcJobsiteInfoView to NOT use the JobsitePhoneView in order to improve performance.
 - Added a new WOHistSummaryDescView that returns a concatenated version of the Work Order Descriptions (up to 4) for the Service Order. This will be used to create a future Jobsite History Report. NOTE: This view will only work in SQL 2008 or greater with the Ascente database in 2008 compatibility mode.
- The CreateTraverseTriggers2005.sql script has been changed to add a new trigger on the CustomFieldDef table. Anytime a new Custom Field is defined or an existing one is changed, the trigger will create a new view for the related table with a list of the custom fields and their labels. For example, if a custom field is set of for the Ad table, a new view will automatically create called AdCustomFieldView. The view will return the IAd_id along with the custom field label(s) and custom field value(s). NOTE: This is only available for systems running SQL 2005 or 2008.
- Changed the Custom.sql script to include code to copy records from the ReportParametersCustom, ReportRangesCustom and LookupParametersCustom tables, if they exist.
- Completed the following changes to the ClearTestTransactions.sql script:
 - Added a list of the tables affected at the beginning of the script
 - Changed the order of clearing to prevent an error deleting records from the tblPoTransReceipt table
- Completed the following changes to the ClearTestPayrollTransactions.sql script:
 - Added a list of the tables affected at the beginning of the script
 - Changed to clear the payroll transaction tables
 - Changed to zero the history tables, rather than delete the records.
- Changed the SetAscentePermissions.sql script to not use the GRANT ALL command since SQL 2008 prefers the specific naming of the permissions.
- Changed the system to support an asterisk (*) in the Crystal Report name in the .rpt file. The system will replace the * with the Report name from the ReportParameters record. This way you can set the Report Name in the .rpt to be something like '* by Vendor' and the system will make the report name be 'A/P History by Vendor'.
- Added a new Template – Excel 2010 Query.xlsx file that will be installed in the Reports folder. This spreadsheet has an instructions tab that details how to refresh data in Excel 2010 when querying from SQL.
- Adjusted the SQL Backup scripts for use with SQL 2005/2008. Split the daily backup into two parts to isolate common problems with CHECKDB. Also use a different method for identifying the database names. New scripts:
 - Monthly.sql
 - Translogs.sql
 - Daily1.sql
 - Daily2.sql
- Added a Pause to the end of the RestartPaging.cmd option. This way it can be called from a Favorites Menu selection within Ascente and will pause so the user can see that the restart worked (or not).
- Report Ranges can now support the entry of Date and Time if the type is set to Date and the max field length is set to 21.
- Phone Extension fields – Throughout the system increased the size of the Jobsite and Customer Phone Extension fields to allow the entry of up to 200 characters.
- Custom Fields – Changed the system to allow 100 characters instead of 30 in a custom text field.

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- Added the following new scripts:
 - UpdateTaxGroupinJobsiteContractDefaults.sql – Sets the Tax Group in the JobsiteContractDefaults based on the Tax Group assigned to the Zip Code of the Jobsite
 - UpdateTaxGroupinServiceOrder.sql – Sets the Tax Group in Service Order based on the Tax Group assigned to the Zip Code in the Service Order
 - ConvertToUpperLowerAscente.sql – Changes Jobsite Name and Address information to be in proper case
 - ConvertToUpperLowerTraverse.sql – Changes Vendor Name and Address information to be in proper case
 - FindAllTriggers.sql – Returns of a list of all Triggers defined in a database.
 - CreateTechMobileUploadTablesRecords.sql – This deletes any existing entries in the TechMobileUploadTables table and add new records for all techs/all tables. You can then go in and delete any records that you don't want to update to the mobile units in the field.
 - Access2003Security32.reg and Access2003Security64.reg – These update the registry when double clicked to adjust the Microsoft Access security so the user does not get security warnings when running Traverse. The 32 version is for 32-bit systems and the 64 version is for 64-bit systems.
 - UpdateMobileTablesFromTraverse.sql – Used when initially configuring Mobile Pro on a system.
 - UpdateSOSalesTaxAmount.sql – Used to update Sales Tax in existing Service Orders when there is a rate change.
- System Information Maintenance Utility:
 - Added more options for the -d command line switch that represents the Debug Mode Number. For example you can run Ascente.exe -d 10 so you can see database calls when the application starts. Also added a new Debug Mode Number 15 that only reports INSERT, UPDATE and DELETE statements. A new Help button has been added to the Debug Dialog form that lists the available codes.
 - Also added a new Application Tag field that can be used to filter the SQL Commands displayed. Only those commands that have a value entered in this field will display. If you want to select multiple commands use the pipe symbol (|) to separate the entries.
- Changed the system to use ## in front of Temporary Table names. This causes the temp table to be generated in a way that they can be accessed globally for debugging, but are deleted when the job ends. This will eliminate the issue where temp tables can be left behind in the database if there is an error in the process. This will also eliminate the need for an Ascente user to be made a database owner (since they won't need the ability to create tables in the database).
- Changed the Data Conversion process to:
 - Stop/Start the new Ascente GPS Service. Also removed the warning of stopping the VBTele program, since VBTele has now been replaced by the Ascente GPS Service.
 - Skip warning the user that someone is connected to the database if the system is performing a CHECKPOINT operation on the database.
- Lookups:
 - Item Lookup – Added Standard Cost
 - Job Lookup – Added Customer ID and Customer Name
 - Purchase Order Line Lookup – Added Quantity and Unit Cost
 - Service History Lookup:
 - Added Work Date, which will display the most recent Work Date from all of the Work Orders associated with the Service Order
 - Added Promise Date
 - Added Branch and Department
 - Work Order Lookup – Added Invoice #, Jobsite Address line 1 and City
 - Added new feature where your Customer Service Representative can set up the system to display a field as a lookup instead of a list box. This comes into play if you have a large number of items for a field (say hundreds of Ad Codes), and this causes the forms to load slowly. Changing the field to be a lookup will speed up the loading of the forms.
- Job/Phase/Cost Code entry:
 - Fixed an issue throughout the system where after entering the Job # you would have to press tab twice to move to the next field if using phases. Also the system would move to the Cost Code instead of the Phase field.

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- Job Cost Reports – Changed the format of the SQL commands used by the Job Cost Reports to improve performance.
- Changed Ascente to give a more detailed message at start up if the Traverse.Protect.dll component is not registered properly or is not found.
- Notes – added Create Date/Time to the display grid.

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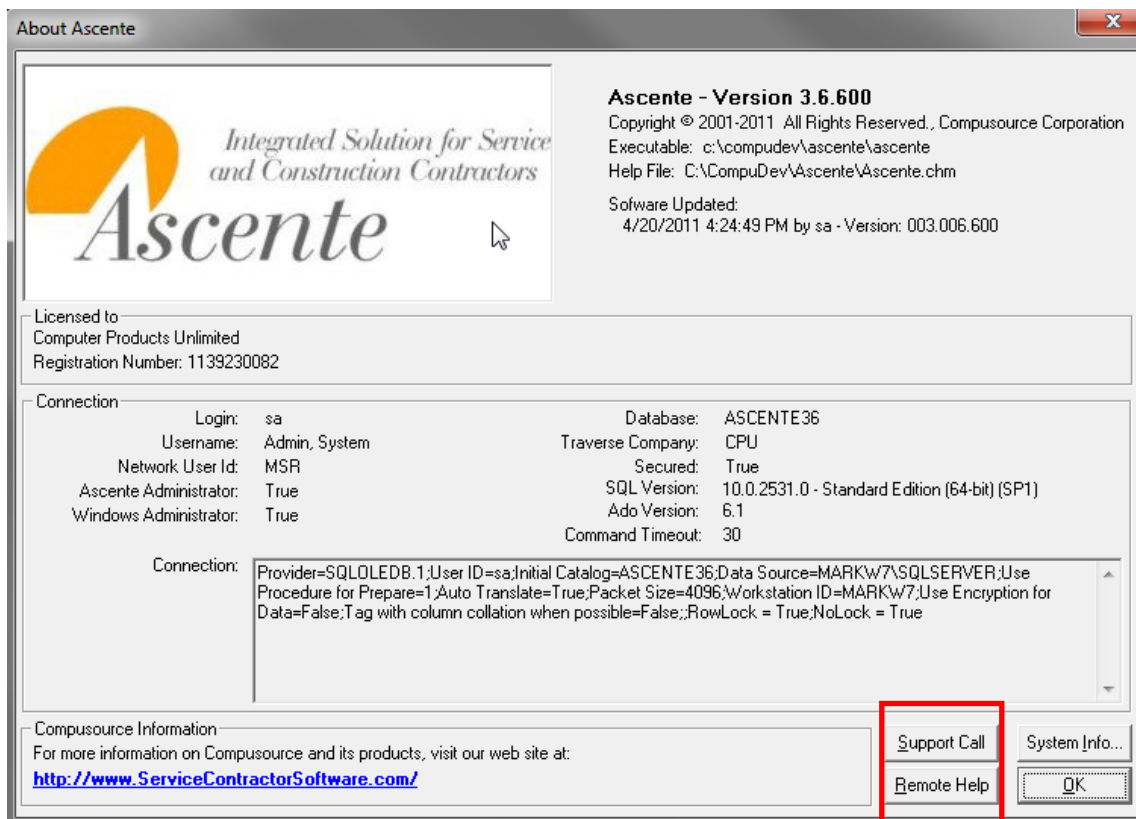
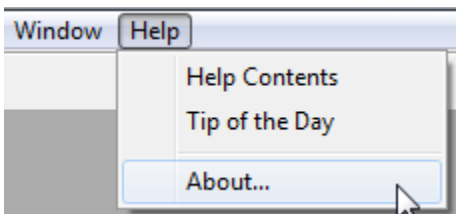
AscenteSetup Installation Program

- The installer will only run if Ascente 3.6.8, 3.6.9 or 3.7.x are currently installed. If running on a prior version of Ascente you will first have to upgrade to Ascente 3.6.9.
- A new AscenteDownload.exe program will be installed in a folder under Ascente called Downloader. An AscenteDownload.exe.config file will also be placed in this folder and should be edited to point to the correct SQL instance and Ascente database. The installation program will use this program to update the live database with the Ascente37blank database changes from the Compusource web service. The program can be run standalone if the config file has been edited. This can then be used to download the current copy of individual tables. This typically will only import missing records. To import changed records you will need to first delete the records from the live database.

Built In Support Options – New Feature

The Help, About option from the Toolbar has two new buttons to aid you with Support of the Ascente product:

- Support Call
- Remote Help



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The Support Call button will take you to the Compusource website (www.compusource.com) support login screen:

Support

Compusource Support: Client Login

Access Denied: You must log in before accessing this page

If you are a current client of Compusource and already have a login, please enter your email address and password below.
If you would like to create a login, please [click here to register](#).

Email:

Password:

Forgot your password?
If you already have an account setup, but forgot your password, [click here to reset your password](#).

If you are a current client of Compusource and do not already have a login please [click here to Register](#).

The first time you use this feature you will need to click on the [click here to register](#) option. This will take you to the following screen:

Compusource Support: Client Registration

Fill out the form below to create a login to the Compusource Website.

Please note that you must be a current client of Compusource in order to create a login and that all registrations must be confirmed prior to being activated. You will receive an email notifying you once your login registration has been confirmed.

If you already have a client login, [click here](#) to log in now.

Fields marked with * are required.

*First Name:

*Last Name:

*Company:

*Job Title:

Location / Branch:

*Phone: () Ext:

Fax: ()

*Software Package:

*Email:

*Confirm Email:

*Password:

*Confirm Password:

Once you submit your registration you will receive an e-mail notifying you when your login has been created.

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Once created you can then login and log a Hotline call using the following form:

Compusource Support: Hotline Support Request

If you are a client of Compusource and would like to submit a support request, please fill out the following form. This form will be forwarded to the support department. Your request for service will be responded to in the order that requests are received.

It is important to note that this method of requesting support is not intended for urgent problems. Any urgent requests should be directed to the Compusource Hotline by phone.

Fields marked with * are required.

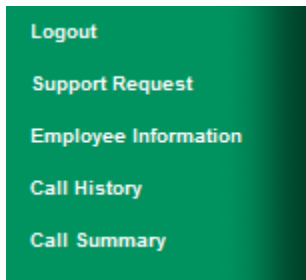
*First Name:	<input type="text" value="Mark"/>		
*Last Name:	<input type="text" value="Rice"/>		
Company:	<input type="text" value="Compusource"/>		
Client ID:	<input type="text" value="99999"/>		
*Area Code / Phone:	<input type="text" value="714"/>)	<input type="text" value="522-8300"/>	Ext: <input type="text" value="238"/>
Area Code / Fax:	<input type="text"/>	<input type="text"/>	
*Email:	<input type="text" value="mrice@compusource.com"/>		
Software Package:	<input type="text" value="Ascente"/>		
Location / Branch:	<input type="text"/>		
*Please select the area that best describes the problem you are inquiring about:	<input type="text"/>		
*Brief description of the question/problem:	<input type="text"/>		

Please provide us with any **additional details** in the space provided below:
(Please note that only 22 lines of details will be accepted.)

Submit

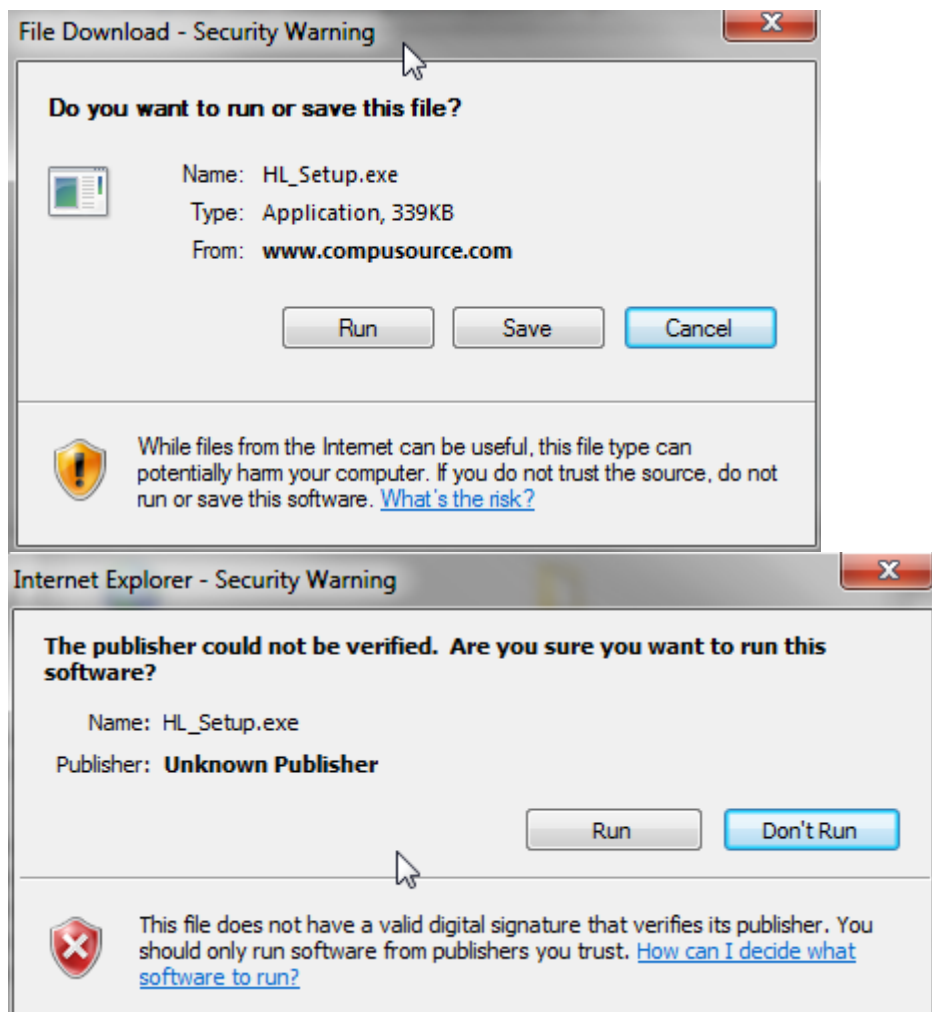
Ascente 3.7 Enhancements/Fixes

You can also do these functions:



- Logout of the website
- Enter a Support Request
- View Compusource Employee Information (picture, e-mail address, phone extension Current status)
- View your Support Call History
- View a Summary of your outstanding Support Calls

The Remote Help button launches a program that will allow the Hotline staff to connect to your workstation for assistance. You may get the following warning screens when this is launched:



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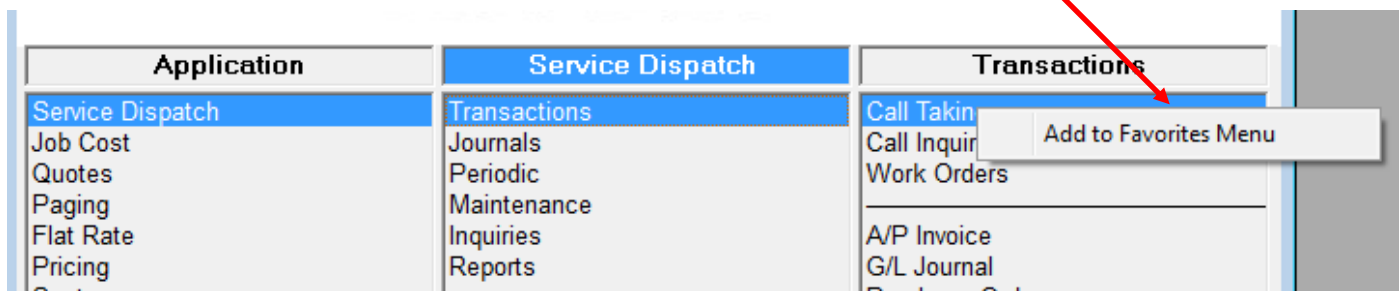
Click on Run each time. The following screen will then display:



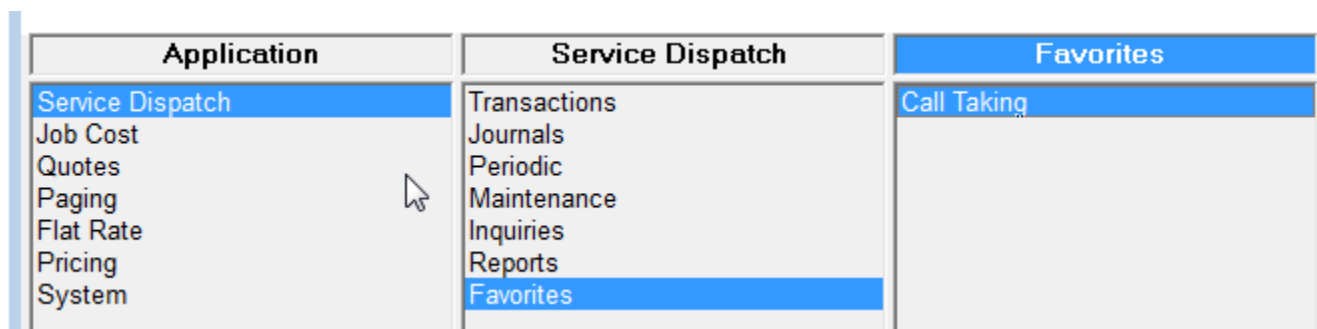
Enter the ID Number provided by your Hotline Support contact and then click on Connect. Once the connection is established the Hotline support personnel will be able to view your screen and take control if necessary.

Favorites Menu – New Feature

You can now set up a Favorites Menu within Ascente. To do this, drill down on the menu to one of your favorite menu selections and right click. An option will display to add this item to your Favorites Menu:

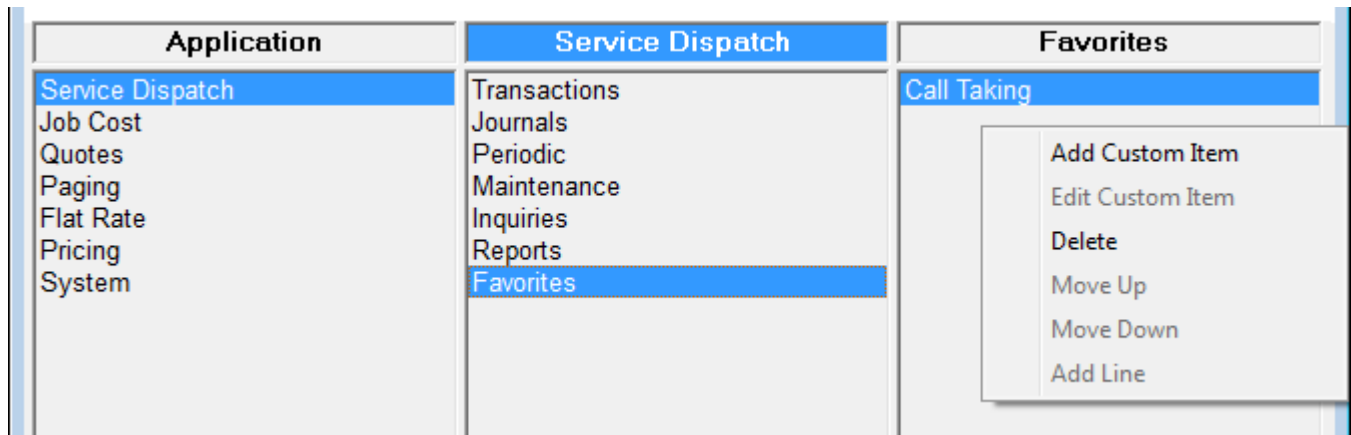


Once this has been done, a new Favorites option will appear on the menu in the middle column for ALL applications. The items you add to the Favorites Menu will appear in the far right column:



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Once you have created a Favorites Menu you can add Custom Items by right clicking in the right column on the Favorites Menu and selecting Add Custom Item:



You can add links to websites:

Favorites

Menu Description:

Command:

You can add links to external programs:

Favorites

Menu Description:

Command:

Or you can view a specific file:

Favorites

Menu Description:

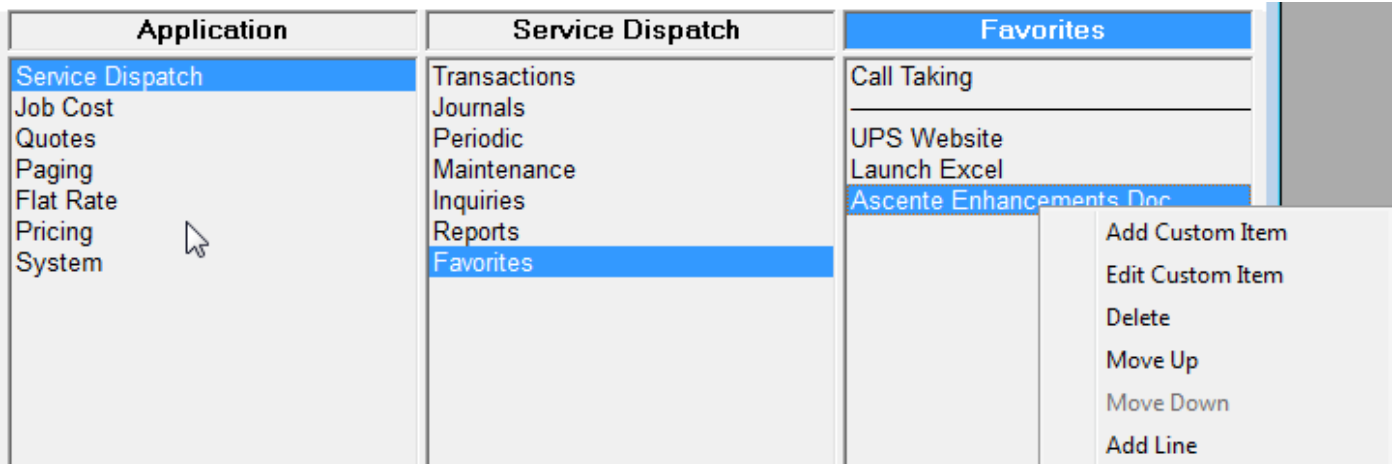
Command:

NOTE: If you are running in a Terminal Services environment, the Terminal Server must have the appropriate programs installed to view the file selected. In the above example Microsoft Word would need to be installed in order to view the file.

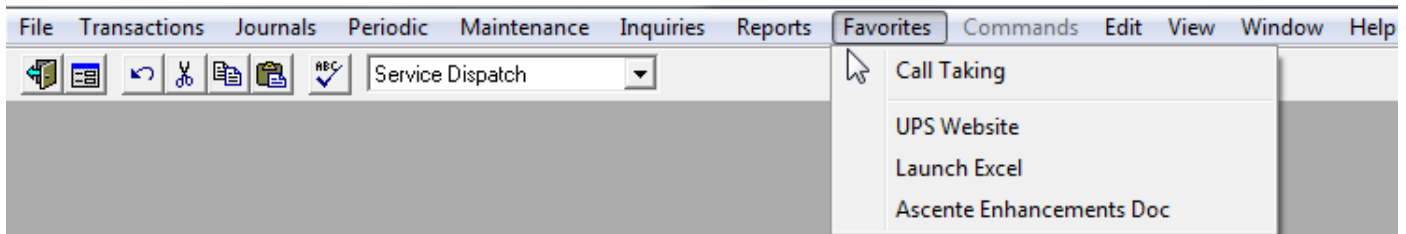
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Once you have items on your Favorites Menu you can also do the following items by right clicking on the menu:

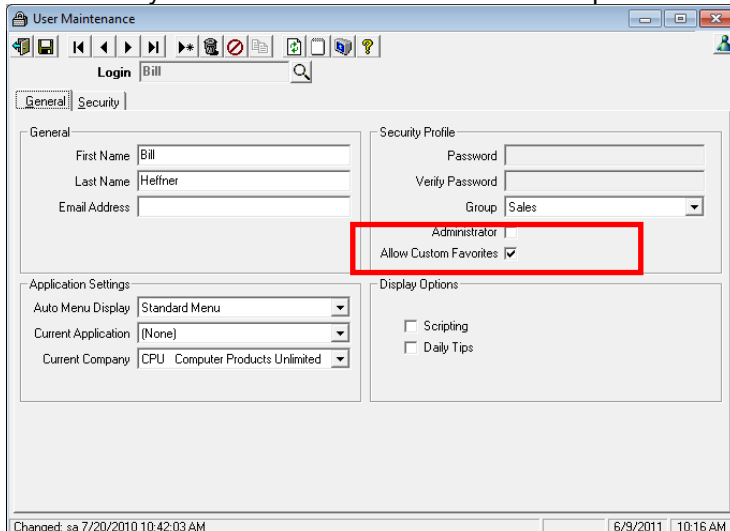
- Add Custom Item
- Edit Custom Item
- Delete
- Move Up
- Move Down
- Add Line



The Favorites Menu is also accessible from the Toolbar:



Optionally you can disable the ability to add custom items to the Favorites Menu by user. The User Maintenance screen has a new check box to turn the feature on/off. NOTE: If a user is set as an Administrator, they will automatically have the 'Allow Custom Favorites' option checked and this cannot be changed.



Ascente 3.7 Enhancements/Fixes

Automatic E-mailing of Ascente invoices to customer – New Feature

Ascente has been changed to look at the Traverse Customer Document Delivery feature to determine if a Service Invoice should be printed or e-mailed directly to the customer. To enable e-mailing you will first need to Traverse, System Manager, Company Setup, Business Rules and drill down to the System Manager application. Here you will need to complete the Email Settings options:

SM - Business Rules

Application

- Accounts Payable
- Accounts Receivable
- Bill of Materials/Kitting
- Bank Reconciliation
- CRM
- Direct Deposit
- Distribution Planning
- Fixed Assets
- General Ledger
- Inventory
- Project Costing
- MFG - Bills of Material
- MFG - MPS/MRP
- MFG - Production
- MFG - Routing & Resources
- Payroll
- Purchase Order
- Point-of-Sale
- Service Director
- System Manager**
- Sales Order
- Warehouse Management
- X Charge Setup

Email Settings

Default Mapping Program	MapQuest
SMTP Server Name	compuwest.compusource.com
Sender's Display Name	Mark Rice
Sender's Email Address	mrice@compusource.com
Reply to Address	mrice@compusource.com
Message Template File	
Send Email as HTML	No
Attachment Format	PDF
POP3 Server Name	compuwest.compusource.com
Login Name	msr
Login Password	*****
Certificate	

Fax Settings

Fax Server	
Cover Page	
Sender's Display Name	
Fax Number	

Interface - Application

General Ledger	Yes
----------------	-----

Attachment Format

To flag an individual custom to receive their invoices via Email instead of paper go to Traverse, Accounts Receivable, Setup and Maintenance, then Customers. View the customer to be configured and then click on the Document Delivery button:

Customers -- 21084 -- Zymax Zystar PC Distr. Corp.

Customer ID: 21084

General | Defaults | Balance | History | Payments | Ship To

Name: Zymax Zystar PC Distr. Corp. Status: Active

Attention: Accounts Payable Bill-To ID:

Address 1: 7000 Lee Plaza

Address 2: Administration Building

City: South San Francisco

Region: CA Country: USA

Postal Code: 94080 Territory: Western

International Prefix: 001 Ship Zone: 5

Contact: Lou Chang

View Map

Document Delivery ... Invoices Detail History Summary History

Compusource Corporation sa F2 Lookup

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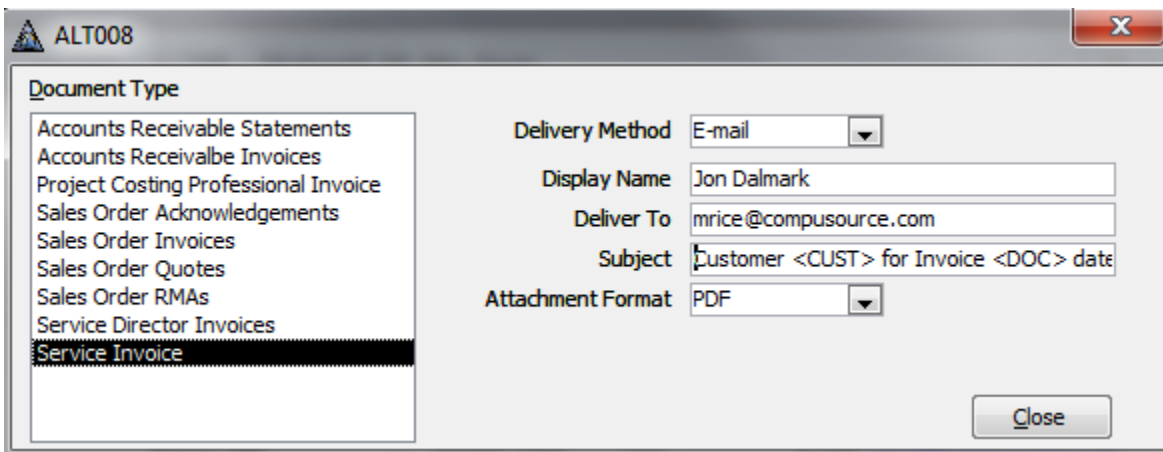
Here you will see a list of Document Types with Service Invoice as one of the types listed. Click on the Service Invoice type and then set the Delivery Method to E-mail. (Note that Fax is not a supported method through Ascente at this time). You will then need to fill in the Display Name, Deliver To (e-mail address, or multiple e-mail addresses separated by semi-colons [;]), and Subject line. Ascente will always send the invoices as PDF attachments, regardless of the Attachment Format setting on this screen.

If the Subject is left blank the e-mail subject will default to:
Invoice [Invoice Number] dated [Invoice Date] for [Customer Name].

Optionally you can enter text in the Subject line and use the following tokens:

- <DOC> = Invoice Number
- <DATE> = Invoice Date
- <CUST> = Customer Name

For example, the Subject could be set to "Customer <CUST> for Invoice <DOC> dated <DATE>" and the result would be an e-mail subject like "Customer ABC Corp. for Invoice 123456 dated 07/14/2011".



Once this has been configured, when invoices are processed the Ascente system will check to see if the Delivery Method is set to Paper or E-mail and then process the invoice accordingly.

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The Ascente System, Maintenance, Company file will have 3 new fields related to the processing of e-mail invoices:

Path for PDF Reports – This is where you can specify where copies of the pdf invoices will be stored on the server. The system will automatically archive the copies in this location. The name of the pdf invoices will be “SERV INV <InvoiceNumber>.pdf”

Store by – This determines the sub-folder automatic naming convention for the PDF files. The options are:

- Year – This will create a sub-folder in the format YYYY (ie, 2011)
- Month – This will create a sub-folder for Month below a year folder – YYYY\YYYY-MM (ie, 2011\2011-07)
- Day – This will create a sub-folder for Day within Month – YYYY\YYYY-MM\YYYY-MM-DD (ie, 2011\2011-07\2011-07-14)

BCC Email – This is where you can enter a Blind Copy e-mail address (or multiple addresses separated with semi-colons [;]) that will receive a copy of all e-mailed invoices. This way if a customer indicates they did not receive a copy, you can locate the blind copy and forward it to them.

Company CPU Computer Products Unlimited

General

Database: Ascente

Payroll Year: 2011 CPU2

General Ledger

Use Traverse GL Method ☒

Branch GL Segment: 1

Department GL Segment: 2

Accounts Payable

Calculate Discount for Debit Memos ☒

Paths

Path for Modified Reports: C:\Data\Reports_3.7 Reports

Path for Temporary Reports: C:\CompuDev\Ascente\ReportsModified

Path for PDF Reports: C:\Temp\Service

Store by: Year

Email

BCC Email: mrice@cpmpusource.com

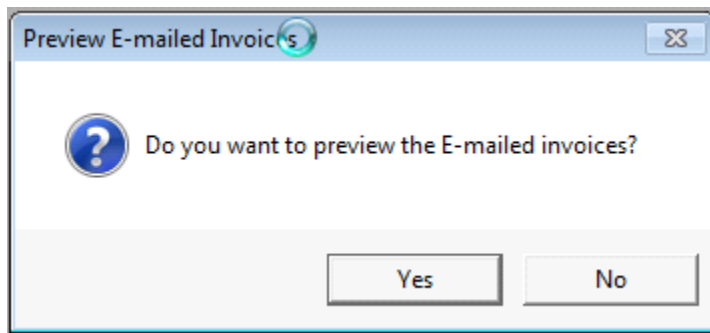
Changed: sa 6/9/2011 12:04:26 PM 6/9/2011 12:06 PM

Ascente 3.7 Enhancements/Fixes

When the Prebill Register is run, the report will indicate those Service Orders that will be delivered by e-mail:

Technician: John Fig									
Service Order LA200024M		Status	Closed	Invoice # LA200024M		E-mailed			
Job Site Name	Compusource Corp	Branch	LA	Tech	John Fig	Invoice Method	T&M		
Job Site Alpha	20 Centerpointe Drive	Department	Air Conditioning	Invoice Print	Standard	Cust Lvl / Price	/		
Customer	ARG Systems Inc.	Tax Group	CA	Summarize	Labor	Maint Pricing	Maint-Billable		
Terms	2% Disc	Type	Air Conditioning	Price Break		JPR status	Contract/PM		
Work Order	LA200024M	2/01/04	Status	Closed	Maintenance		Tech John Fig		
Bill Type	Location	Item	Description	Quantity	Unit Cost	Ext Cost	Unit Price	Ext Price	Tax
Mainten	CA0001		Maintenance Contract	1.00		.00		.00	2
Problem Maintenance		WO Desc WO LA200024M: Maintenance							
Total Service Order	Non Taxable Sales	Taxable Sales	Sales Tax	Use Taxable Sales	Use Tax	Total Cost	Profit %	Payments	Invoice Total
LA200024M	.00	.00	.00	.00	.00	.00	0.00%	.00	0.00

When the Prebill Register, Invoices option is run, the system will check each customer to determine if the delivery method is via Paper or E-Mail. Only those customers flagged as Paper will get a physical invoice printed. After the paper invoices have printed you will get the following dialog box displayed:



If you click Yes the system will preview the invoices to be e-mailed on the screen. You can optionally print these to paper. If you find any problems you can go back and make corrections and then rerun the Prebill process.

Once the Update button is clicked, the system will generate the invoices for those customers set to deliver via E-Mail.

If the system has a problem generating the E-Mail an Exception Log will print. Below is an example. If the PDF was successfully created you can manually attach it to an e-mail and send it out. If the PDF was not successful, you can use the standard Invoice Reprint option to generate a printed copy, or export to e-mail.

6/07/11 3:43 pm	Computer Products Unlimited Log Exceptions Report	Page 1 of 1
Exceptions for: Prebill Register	**** Exceptions During Update ****	
Run Date & Time 20110607154152	User: SA	
Exception: Email was not sent properly - No Recipient E-mail Address Specified Subject: Invoice Farman-0479 dated 6/7/2011 for Compumarc Attachment: C:\Temp\Service\SERV INV Farman-0479.pdf for Invoice Farman-0479 for Service Order 405		

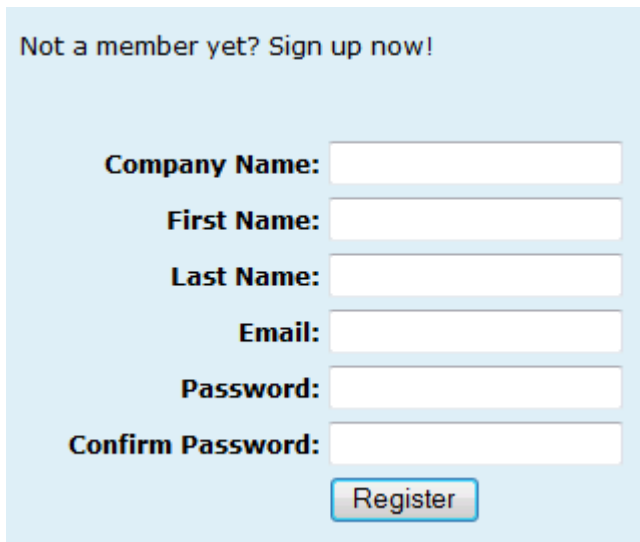
Exception: PDF was not created - Invalid directory. PDF file name: 'C:\Temp\KMR\Service\SERV INV Farman-0479.pdf' for Invoice Farman-0479 for Service Order 405 so could not be emailed.		

Ascente 3.7 Enhancements/Fixes

Web Portal Interface – System, Maintenance, Web Portal User – New Feature

A new Web Portal User maintenance program has been added to the System section of Ascente. This is used to maintain logins for the new Ascente Web Portal Interface. This interface allows your customers to log into your website and view their account information (Unbilled Service Orders, Open Quotes, Service History, Components, Component Unbilled Service Orders, Component Quotes and Component Service History).

The user must create a login before they can access their information. They complete the following form on the website, which will add a record to the new Web Portal User screen and e-mail someone in your company that this has occurred.



Not a member yet? Sign up now!

Company Name:

First Name:

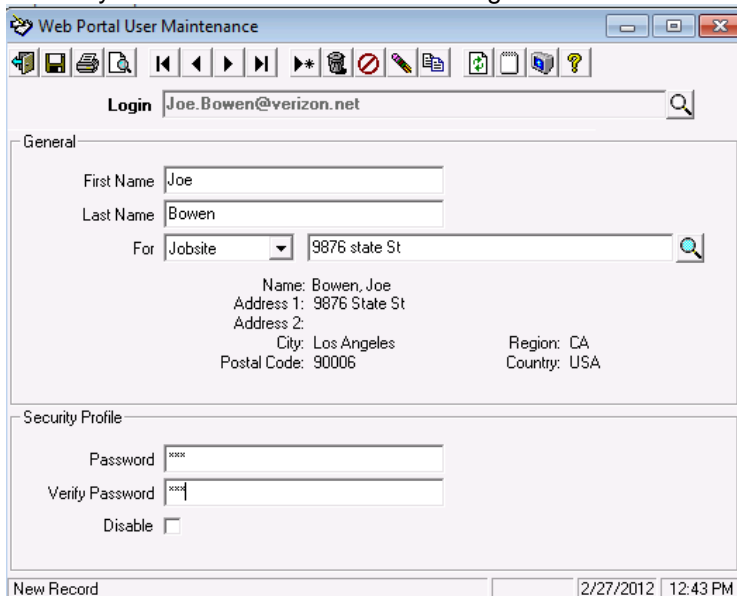
Last Name:

Email:

Password:

Confirm Password:

You would then view the login in the Web Portal User screen and link the login to the appropriate Jobsite or Customer. Once this has been done, you will want to e-mail the customer to let them know their account is active. You may also disable their account through this screen.



Web Portal User Maintenance

Login:

General

First Name:

Last Name:

For:

Name: Bowen, Joe
Address 1: 9876 State St
Address 2:
City: Los Angeles
Postal Code: 90006
Region: CA
Country: USA

Security Profile

Password:

Verify Password:

Disable: ☐

New Record

Reply To and Send To e-mail address have been added to the Company table in the database and a future release will allow you to maintain these fields.

Ascente 3.7 Enhancements/Fixes

Tables have also been added to the system to allow for the customization of the data returned to the Web Portal by a button, be able to add custom buttons, and also limit which buttons a Web Portal user will see. Maintenance programs for these tables will be added in a future release, but for now the support staff can assist with these types of changes.

Hide Pay Rates expanded to Job Cost – New Feature

Expanded the Hide Pay Rates security feature to the Job Cost module in the following areas:

- Labor Dollars are excluded on the following reports/screens if Hide Pay Rates is set for a user:
 - Contracts in Progress
 - Estimate/Actual Worksheet
 - Job Actuals Inquiry
 - Job Actuals Detail
 - Job Backlog
 - Job Cost Detail
 - Job Cost Report with Close Outs
 - Job Costs by Cost Code
 - Job Costs by Group
 - Job Costs by Job
 - Job Status
 - The reports will print the following message if Pay rates is set to 'Hide' for a user:

5/10/11
1:02 pm

Compusource Corporation
Job Cost Report with Close Outs
Sorted By Customer

** User msr3 does not have access to pay rates.
Labor amounts not included. **

Sorted by Customer: (Cash)
Steve Shea Bathroom Addition
9411 Maple St
BELLFLOWER, CA 90706

Job: J1234

Branch: Los Angeles County

SlsRep: GJL
Job Status: Open

Contract Amount 5,000.00
Change Orders .00
Adjustments .00
Pending .00
Revised Amount 5,000.00

Billed to Date - Tax .00
Retention to Date .00
Paid to Date .00
Percent Billed .00%
Actual/Billed .00%

Start Date: 08/18/2005
End Date
Percent Complete .00
(Actual / Estimated)

Customer: (Cash)
Cash Customer

Cost Code Description Est Qty Actual Qty Est \$\$ PO Bal WIP Close Outs Total Costs Remaining Burden

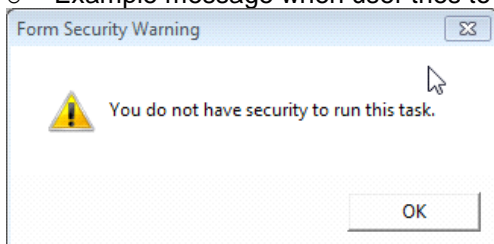
10 Labor
1000-RoughInLabor All Labor .00 .00 .00 .00 .00 .00 .00 .00 .00
10 Labor .00 .00 .00 .00 .00 .00 .00 .00 .00

Report Totals for Job: J1234 .00 .00 .00 .00 .00 .00 .00 .00 .00

Job Totals: J1234
Total Cost: .00
Gross Profit: 5,000.00
Profit Percent: 100.00%


Estimated
Committed
Actual

- The user will not be able to run the following reports if Pay Rates is set to 'Hide':
 - Certified Payroll Report
 - Job Cost Detail with Burden
 - Payroll Reports
 - Payroll Trend Reports
 - Relieve Work in Progress Register
 - Union Report
 - Example message when user tries to run one of these reports:



Ascente 3.7 Enhancements/Fixes

Copy To Button – New Feature

A new Copy To button  has been added to both the Call Taking and Service Order History screens. This button allows you to Copy the contents of the currently displayed record into a new record in another form.

For Call Taking, if this button is pressed, a new Quote will be created using the information from the Call Taking screen. In conjunction with this, a new Quote Type field has been added to the Trouble file. When the Quote is created from Call Taking, the Quote Type will default from the Trouble code assigned to the displayed call. The information is displayed in the Quote entry screen, and the user can override any of the values.

For Service Order History, if this button is pressed, a new Service Call will be created based on all of the information from the call displayed in history. The new Service Order number will be the original number with a –CM appended. The new Service Order will be a credit memo type and the Invoice number will be the original invoice number with a –CM appended. The idea here is to make it easier to create a credit of an item in history. The information will be displayed in the Call Taking screen, and the user can override any of the values.

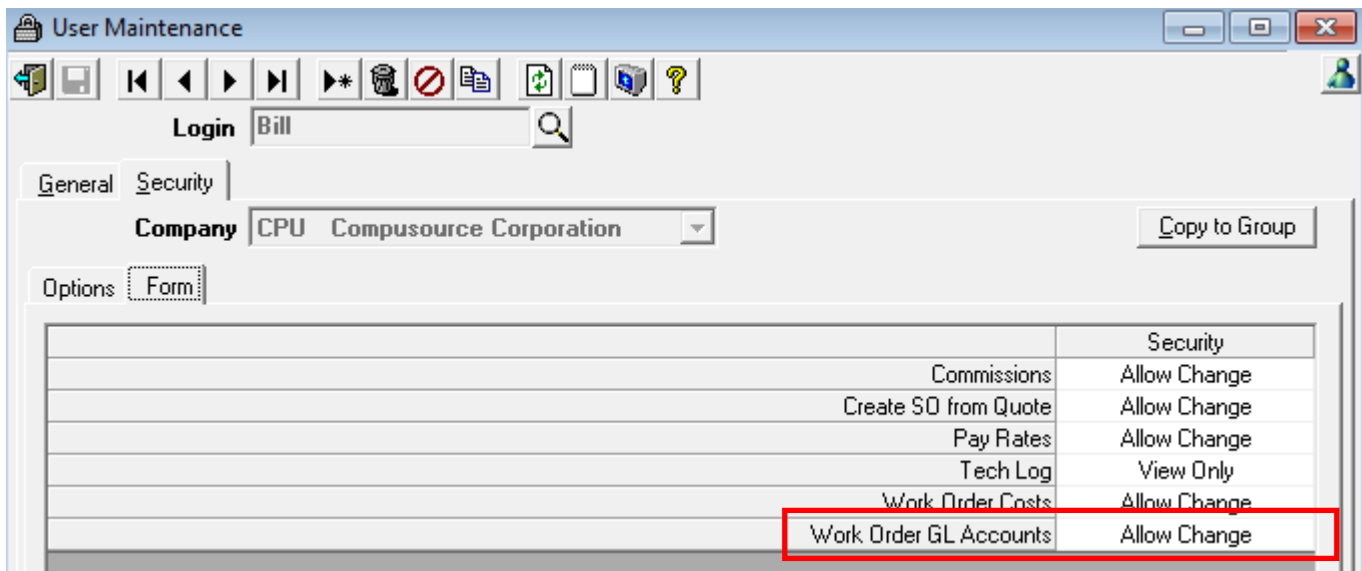
Note that for both of these options, the default values for the new Quote or Service Order can be adjusted through settings in the database by your Customer Service Representative. Also, this feature has been designed such that it is fairly easy to add it to additional forms. Please let us know if you have another application of this process that would be helpful.

Work Order GL Accounts Security – New Feature

A new security option has been added to User Maintenance where you can control if a user can see or change the GL Accounts related to Work Order lines.

A new Work Order GL Accounts field is now displayed on the System, Maintenance, User Maintenance, Security, Form tab.

By default this will be set to 'Allow Change' which will provide the same functionality as has always existed. If you change this to 'View Only', the user will be able to click on the GL Accts button in Work Order, but will not be able to change the GL Accounts. If you change this to 'Hide', the user will not see the GL Accts button, nor see the GL Accounts in the grid in both Work Order Entry and Work Order History.



The screenshot shows the 'User Maintenance' window with the 'Security' tab selected. The 'Company' is set to 'CPU Compusource Corporation'. A 'Copy to Group' button is visible. Below the 'Options' section, there is a table with two columns: 'Security' and 'Allow Change'.

Security	Allow Change
Commissions	Allow Change
Create SO from Quote	Allow Change
Pay Rates	Allow Change
Tech Log	View Only
Work Order Costs	Allow Change
Work Order GL Accounts	Allow Change

Ascente 3.7 Enhancements/Fixes

Only Allow Estimated Cost Codes – New Feature

A new field has been added to the Options and Interfaces (Construction) to identify if a user should only be allowed to use Cost Codes that have Estimates created for the Job:

Job Cost Options & Interfaces Maintenance

General | User Defined Fields

Options

Use Phases ☒ Direct Expense Costs ☐

Relieve WIP by User ☒ **Only Allow Estimated Cost Codes ☐**

Accrue Retention ☒ Days to Add for Retention 90

Retention on Sales Tax ☒

Retention Tax Class 2 Exempt Sales

Accrued Retention GL 00-000-2130 Retention Accrued

Close Method Percent Complete

Invoice Suffix 001

Defaults

Department Heating

Job Contract Type Contract

Bill Distribution Construction

Cost Distribution Labor

Tax Class 2 Exempt Sales

Use Tax Cost Code Use Tx

Payroll Deduction Codes

Fed W/H FWH SDI SDI Misc Ded 1 D10

Fica FIC Other OTH Misc Ded 2 D20

State Tax SWH Vacation VAC Misc Ded 3 D30

Changed: karen 3/8/2011 2:13:06 PM 3/14/2011 1:07 PM

If this is NOT checked, the system will work like it always has.

If this IS checked the system will hide the magnifying glass lookup option on the Cost Code field and only load the combo box with the Cost Codes that have Estimates for the selected Job. This occurs in the following screens:

- A/P Invoice Entry
- G/L Journal
- Inventory to Job
- Purchase Order
- Timecard
- Job Time and Material Billing

Ascente 3.7 Enhancements/Fixes

Example:

Only Allow Estimated Cost Codes checked – no magnifying glass lookup, and the drop down list only shows cost codes with estimates for the selected job.

The screenshot shows the 'A/P Invoice Entry' window. The 'Transaction No' is 00000112. The 'P/O Line' is 999.9. The 'G/L Account' is 00-000-1230 Inventory. The 'Tax Class' is 0 Consumer Good. The 'Cost Code' dropdown menu is open, showing a list of cost codes: 1000-RoughInLabor, 1001, 1-1, 2000, 3001, 4000, 5001, and 7001. The 'Retention %' is 0.00 and the 'Unit Cost' is 0.0000.

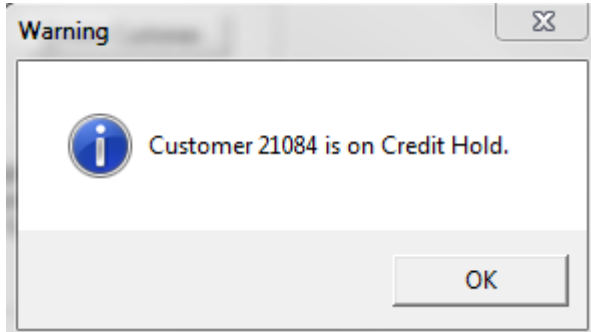
Only Allow Estimated Cost Codes NOT checked – magnifying glass lookup available, and the drop down list shows ALL cost codes, even if no estimate.

The screenshot shows the 'A/P Invoice Entry' window. The 'Transaction No' is 00000112. The 'P/O Line' is 999.9. The 'G/L Account' is 00-000-1230 Inventory. The 'Tax Class' is 0 Consumer Good. The 'Cost Code' dropdown menu is open, showing a list of cost codes: 1000-RoughInLabor, 1001, 1002, 1003, 1-1, 1999, 2000, and 2001. The 'Retention %' is 0.00 and the 'Unit Cost' is 0.0000. A magnifying glass icon is visible next to the dropdown menu.

Ascente 3.7 Enhancements/Fixes

Credit Hold Warning – New Feature

The Call Taking and Quote Entry screens have been changed to display the following warning if a Service Order or Quote is entered for a customer that is flagged on Credit Hold:



The user will still be able to enter the transaction, as this is only a warning.

Item Status Checking for Bill of Materials – New Feature

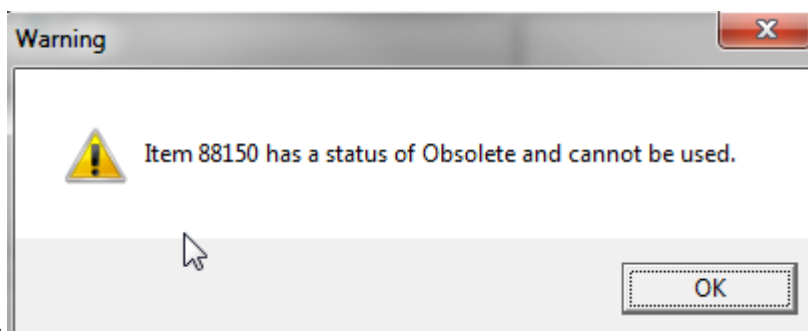
The Item Bill of Material Maintenance screen has been changed to display the Item Status for both the Task and Component items:

A screenshot of the "Item Bill of Material Maintenance" application window. The window has a title bar and a toolbar. The main area contains fields for "Item ID" (200), "Additional Description" ("This item is highly sensitive and carries a long lead time."), and "Item Status" (Active, highlighted with a red box). To the right, there is a "Pricing for:" section with a dropdown menu set to "CA0001 OAKL" and a table showing "List" and "Base" prices. Below this is a table with columns: "Component Item ID", "Description", "Item Status", "Skip", "Zero Price", and "Quantity". The table lists several components, including "Critical Package", "Interior Materials", "Labor", and various "Electrical Package" items. The "Item Status" column for these components is highlighted with a red box. At the bottom, there is a status bar showing "Created: 12/30/2010 5:27:50 PM", "Changed: sa 12/30/2010 5:27:50 PM", and a date/time stamp "1/4/2011 8:12 PM".

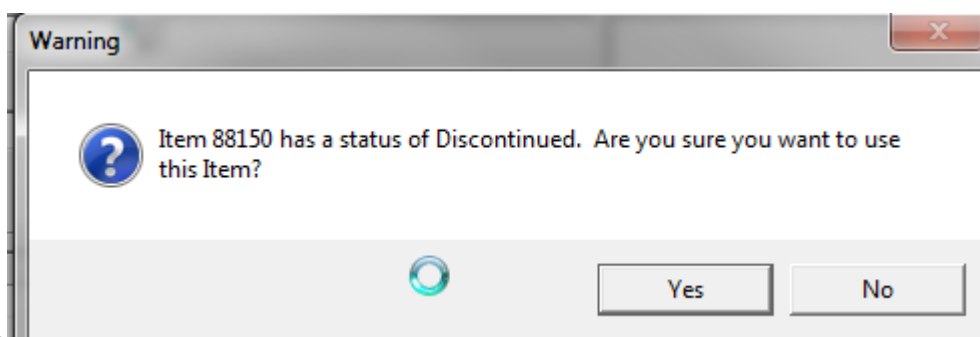
Component Item ID	Description	Item Status	Skip	Zero Price	Quantity
100	Critical Package	Active	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1.000
400	Interior Materials	Active	<input type="checkbox"/>	<input type="checkbox"/>	4.000
L	Labor	Active	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2.000
100o	Electrical Package 100o	Obsolete	<input type="checkbox"/>	<input type="checkbox"/>	3.000
100d	Electrical Package 100d	Discontinued	<input type="checkbox"/>	<input type="checkbox"/>	1.000
100x	Electrical Package 100x	Superceded	<input type="checkbox"/>	<input type="checkbox"/>	1.500

Ascente 3.7 Enhancements/Fixes

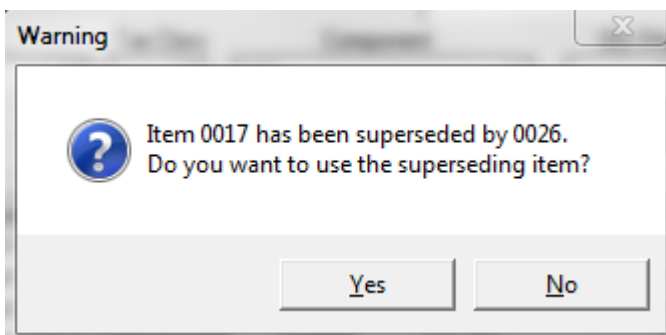
The user will now get one of the following messages if a Bill of Material is used that has item with a status other than 'Active':



- Obsolete – Once you press OK the system will skip this item, but will continue to load other items in the Bill of Material.



- Discontinued –



- Superseded – If you answer Yes, the system will use the Superseding item. If you answer No the system will use the original item.

These messages will occur in Work Order Entry, Quote Entry, Inventory to Job and Job T&M Billing.

Work Order Entry, Quote Entry, Inventory to Job, Job T&M Billing and Purchase Order will all display these messages if directly entering an item that has a status other than 'Active'.

Also, the Flat Rate Price Book Reports record sets have been changed to include the Item Status for both the Parent and Component Items. At this time the actual reports have not been changed to print these values.


Ascente 3.7 Enhancements/Fixes

Mobile Pro – Tasking History – New Feature

The Mobile Pro product has been changed to store and transfer the Maintenance Contact Tasking information back to the server. The system can be set up to allow the passing of all task items, nothing, or just those items that a tech enters values for. The Prebill update then moves this Tasking information to History.

At this time, the Tasking History can only be viewed using Excel or a custom report. We will look at adding package reports in a future release.

Mobile Pro – New Billing Checks in Ascente

Ascente has been changed to check for unposted Mobile Pro Work Order line transactions. This can occur if the Mobile Pro Service has stopped running for some reason. In both Call Taking and Work Orders the Billing Status button  now does this additional check to see if there are unposted Mobile items. If so, the following message will appear:



Also the Prebill Register when run now also checks to see if there are unposted Mobile Pro transactions, and if so the Service Order/Work Order will NOT be selected for processing.

Service Order Workflow Register – New Feature

A new Service Order Workflow Register option has been added to the Service Dispatch, Journals menu.

The Service Order Workflow Register is intended to be used by those companies that have multiple people on staff that must review the Service Orders before they are billed. This can be especially useful for those companies using the Mobile Pro product. Using this tool you can generate a report that shows the Service Order information and optionally the following information:

- Original Quote that was used to create the Service Order
- Payment information
- Technician Log transactions

After the Service Orders have been reviewed, the Update button can be used to change the Service Order or Work Order Status to indicate they are ready for the new person to review, or to be billed.

Ascente 3.7 Enhancements/Fixes

Select Report Values

Range Selection

	Beginning	Ending
Branch		(Ending)
Department	(Beginning)	(Ending)
Supervisor	(Beginning)	(Ending)
Tech	(Beginning)	(Ending)
Service Order	(Beginning)	(Ending)
Service Order Status	(Beginning)	(Ending)
Work Order Status	(Beginning)	(Ending)
Mobile Line Date	(Beginning)	(Ending)

Field Selections

Report Name: Service Order Workflow Register

Password:

Options

☐ Quotes

☐ Payments

☐ Tech Log Information

Register

Update

7/29/2011 8:31 PM

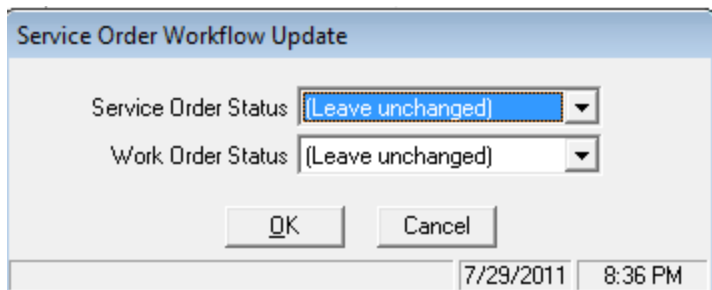
Example usage:

- Technicians using Mobile Pro enter their information in the field and upload to Ascente. Each the person in charge of A/R might want to run this register selecting all Service Orders with a status of 'Closed' and have Mobile Lines dated prior to today. They would also want to check the Payments box, so the payments collected in the field for the Service Order will be listed on the report.
- Once this person completes their review and makes any necessary adjustments to the Work Orders, they would then click on the Update button. Here they could change the Work Order Status to be "Material Review"
- The person that is in charge of Inventory might need to review the Service Orders to insure that all of the proper items have been posted to the job. They would run this register selecting all Work Orders with a status of "Material Review" and would also want to check the Quotes box. This way if the Service Order was created from a Quote, the related Quote detail would print on the register. This can then be used to review that the work/materials quoted was actually provided.
- Once this person completes their review and makes any necessary adjustments to the Work Orders, they would then click on the Update button. Here they could change the Work Order Status to be "Payroll Review"
- The person that is in charge of Payroll/Commissions might need to review the Service Orders to insure that all of the Technicians that worked on the job have labor time posted to the Work Order. They would run this register selecting all Work Orders with a status of "Payroll Review" and would also want to check the Tech Log Information box. This way the Tech Log details related to the Work Order would print on the register. This can then be used to insure that all Technicians dispatched to the job have labor lines on the Work Order.
- Once this person completes their review and makes any necessary adjustments to the Work Orders, they would then click on the Update button. Here they would change the Work Order Status to be "Closed". The Work Order is now ready to appear on the Prebill Register and be invoiced.

NOTE: By default this Register is password protected since a user can change the status of groups of Service Orders/Work Orders. This can be removed if you wish, by contacting your Customer Support Representative.

Ascente 3.7 Enhancements/Fixes

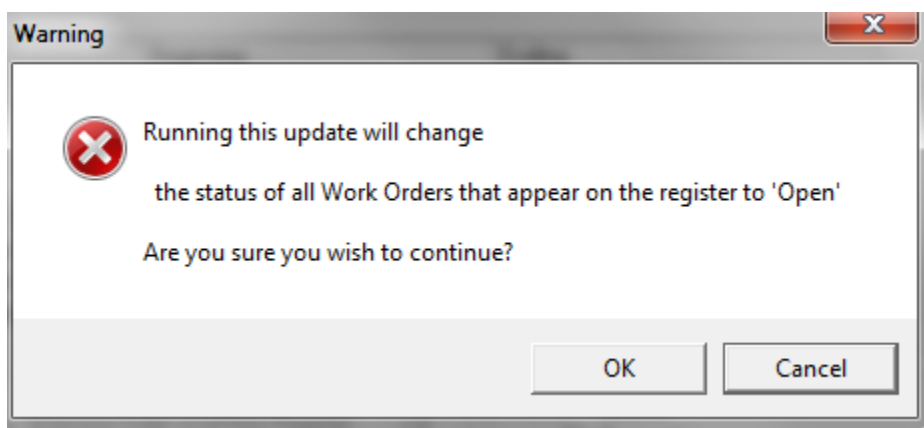
When the Update button is clicked, the following screen will display:



A dialog box titled "Service Order Workflow Update". It contains two dropdown menus: "Service Order Status" and "Work Order Status", both currently set to "[Leave unchanged]". Below the dropdowns are two buttons: "OK" and "Cancel". At the bottom right, there is a timestamp "7/29/2011 8:36 PM".

Select a Service Order or Work Order Status value that you want all of the items on the register to be changed to. You can also use the (Leave unchanged) option to cause that status code to remain the same. Click on Cancel to abort without making any changes.

If you click on OK the system will display:



A warning dialog box with a title bar that says "Warning" and a red 'X' icon. The main content area contains a red circle with a white 'X' icon, followed by the text: "Running this update will change the status of all Work Orders that appear on the register to 'Open'". Below this, it asks "Are you sure you wish to continue?". At the bottom right, there are two buttons: "OK" and "Cancel".

Here you have one more chance to abort. Click on cancel to end without updating. Click on OK to update the transactions on the register.

Ascente 3.7 Enhancements/Fixes

Sample Report:

2/24/12
12:35 pm

Compusource Corporation
Service Order Workflow Register

Page 1 of 1

Service Order LA010072A			Status Closed		Invoice # LA010072A					
Jobsite Name	Wesley Building		Branch	LA	Tech	Eric		Invoice Method	T&M	
Jobsite Alpha	Wesley Building		Department	Air Conditioning	Invoice Print	Standard		Cust Lvl/ Price	/ R 1	
Customer	Axis Electronics		Tax Group	CA	Summarize	Labor		Maint Pricing	Billable	
Terms	Net30		Type	Air Conditioning	Price Break	Material		JPR status	Extra/Emer	

Work Order		Status			Tech Eric					
Bill Type	Location	Item	Description	Quantity	Unit Cost	Ext Cost	Unit Price	Ext Price	Tax	Prof %
Payments										
		Check	Pmt: Check 123123	140.00						
Payroll (Unposted)										
Labor	REG	BOU001	2/24/2012	4.00	15.00	60.00		.00	1	
Quote										
Labor		labor	Labor	16.00	25.00	400.00		.00	0	
Material		AC10	10 Ton AC System	2.00	3,000.00	6,000.00		.00	0	
Material		New line		1.00	10.00	10.00		.00	0	
Material		100	Flex Hoses	1.00	1.00	1.00		.00	0	
Labor		labor	Labor	1.00	25.00	25.00	45.00	45.00	0	44.0%
Material		100	Flex Hoses	1.00	1.00	1.00		.00	0	
Tech Log										
Eric		7/1/2003 10:10:50 AM	Wrk: 0 Drv: 0 Idle: 0							
Eric		8/6/2003 8:07:19 AM	Wrk: 0 Drv: 0 Idle: 0							
Eric		8/7/2010 7:58:22 AM	Wrk: 0 Drv: 0 Idle: 0							
Problem		WO Desc WO LA010072A:								
Work Order LA010072A		2/24/12	Status Open		Tech Eric					
Bill Type	Location	Item	Description	Quantity	Unit Cost	Ext Cost	Unit Price	Ext Price	Tax	Prof %
Work Order										
Labor	CA0001	msr	Test part	1.00		.00	31.33	31.33	1	100.0%
Problem		WO Desc WO LA010072A:								
Total Service Order		Non Taxable Sales	Taxable Sales	Sales Tax	Use/Taxable Sales	Use Tax	Total Cost	Profit %	Payments	Invoice Total
LA010072A		.00	31.33	2.19	.00	.00	.00	100.00%	140.00	33.52

Ascente 3.7 Enhancements/Fixes

Work Order Restock Register – New Feature

The Service Dispatch, Periodic menu has a new option called Work Order Restock Register. This option allows the user to select Closed Service Orders up through a cutoff date. The selection grid will list any Work Orders that have materials that need to be restocked (Item must be set up in inventory, be a non-service type item, and not have been flagged as being on a Purchase Order).

Work Order Restock Register

Select Values

Range Selection

	Beginning	Ending
Branch	(Beginning)	(Ending)
Location	(Beginning)	(Ending)

Field Selections

Report Name: Work Order Restock Register

Through: 11/10/2011

Selected

Location	Work Order	Technician	Jobsite	Work Date	Restock
CA0001	1000a	Bob Jones	21st Century Preparatory	4/7/2011 9:1	<input checked="" type="checkbox"/>
CA0001	33323	John Fig	Baker, Ken	1/19/2009	<input checked="" type="checkbox"/>
CA0001	OC010027M2	Fred Clegg	Cody, Ernie	3/26/2010 10	<input checked="" type="checkbox"/>
CA0001	OC010032M	(Unassigned)	Smith, James	10/1/2004	<input checked="" type="checkbox"/>
CA0001	OC010129	Eric	Anaheim Station 120	7/19/2004	<input checked="" type="checkbox"/>
CA0001	OC010140	Mike Johnson	Smith, Richard	8/3/2004	<input checked="" type="checkbox"/>
CA0001	OC010146	John Fig	Cody, Ernie	9/13/2007 2:	<input checked="" type="checkbox"/>
CA0001	OC010148	Fred Clegg	Jones, Harry	9/21/2004	<input checked="" type="checkbox"/>
CA0001	OC010153	Fred Clegg	Sam's Suitcase Company	3/30/2007	<input checked="" type="checkbox"/>

F6 Maint 11/10/2011 10:41 AM

Once the Work Orders have been selected, the user can change the Restock check box in the grid to drop a Work Order from being flagged as restocked.

The user will then click on the Register button to print the details of the items to be restocked. The report is designed to be a pick list for the warehouse person to pull the items. The report is grouped by Location and then Item. Optionally this report can be changed to print bar codes to make the data entry for the Item Location Transfers go faster.

Ascente 3.7 Enhancements/Fixes

Sample Register:

11/10/2011
10:44:38AM

Work Order Restock Register

Page 1 of 5

Location # CA0001

<u>Location</u>	<u>Item</u>	<u>Item Description</u>	<u>Bin Number</u>
CA0001	0017	Electrodes - Up to 10" GI	

From	To	Work Order	Quantity
Test	CA0001	OC010197	1.00
MD0001	CA0001	Testa	1.00

Total to Restock: **2.00** Qty Pulled _____

CA0001	100	Electrical Package
--------	-----	--------------------

From	To	Work Order	Quantity
Test	CA0001	OC010032M	1.00

Total to Restock: **1.00** Qty Pulled _____

CA0001	10278	Amerivent Vent Flash Oval
--------	-------	---------------------------

From	To	Work Order	Quantity
Test	CA0001	OC010140	1.00

Total to Restock: **1.00** Qty Pulled _____

The From location is set to the Default Location assigned to the Branch related to the Work Order.

Once the register is correct, the user can click on the Update button to flag the Work Orders on the registered as restocked. This will prevent the Work Orders from appearing on future registers.

Work Order Restock Register Update

Restock Date: ▼

11/10/2011 10:46 AM

Ascente 3.7 Enhancements/Fixes

The Work Orders program has been changed to display the Restock Date and allow the user to adjust this if necessary. Normally this field will be blank until the new Restock Register has been run and the batch updated. However, a user can manually set (or change) the restock date to prevent the item from appearing on the Restock Register. Also the user can blank out this field to cause the Work Order to appear on the Restock Register again.

Work Order Entry

Work Order: 1 Service Order: OC010141 Todd, John
567 Elm Sy

Work Order Subtotal: 6.00 Invoice Subtotal: 6.00

Main | Service Order | Detail | Invoice Amounts Recalc Pricing Recalc Taxes

Item ID: 88130 Description: CLT24-1 GOLD CONDENSER Additional Description:

Location ID: CA0001 Bill Type: Material Tax Class: 1 Component: AC1 Qty Shipped: 1.000000

Restock Date: Unit Cost: 0.000000 Extended Cost: 0.00 Unit Price: 1.000000 Extended Price: 1.00

Buttons: OK, Undo, GL Accts..., Comm..., PO Info...

Line	Item ID	Description	Location ID	Bill Type	Qty Shipped	Unit Price	Extended Price
14	88130	CLT24-1 GOLD CONDENSER	CA0001	Material	1.000000	1.000000	1.00
15	88210	CLT48-1 GOLD CONDENSER	CA0001	Material	0.000000	0.000000	0.00
16			CL	Material	1.000000	0.000000	0.00
17	100	Flex Hoses	CL	Material	1.000000	1.500000	1.50
18	0017	Electrodes - Up to 10" GI	CL	Material	1.000000	1.500000	1.50
19	Labor	Bourne, Linda	CA0001	Labor	4.000000	0.000000	0.00
20	Labor	Bourne, Linda	CA0001	Labor	4.000000	0.000000	0.00

Ascente 3.7 Enhancements/Fixes

Work Order Quote Range – New Feature

The Work Order Quote form has been changed to ask for a range of Service Orders to print, rather than just one. The range will default to the current Service Order.

Beginning	Ending
Service Order 1	

Report Name: Work Order Quote

☐ Print Options Cover Page

3/15/2011 12:23 PM

A new menu selection has also been added for this option:

Application	Service Dispatch	Reports
Service Dispatch	Transactions	Service Order Print
Job Cost	Journals	Invoice Reprint
Quotes	Periodic	Work Order Quote
Paging	Maintenance	Service Order Report
Flat Rate	Inquiries	Schedule
Pricing	Reports	Uncollected Work Orders
System	Favorites	Zone Summary
		Jobsite Reports
		Jobsite Performance
		Expired Contracts
		Maintenance Contracts
		Filter Requirements
		Refrigerant Usage

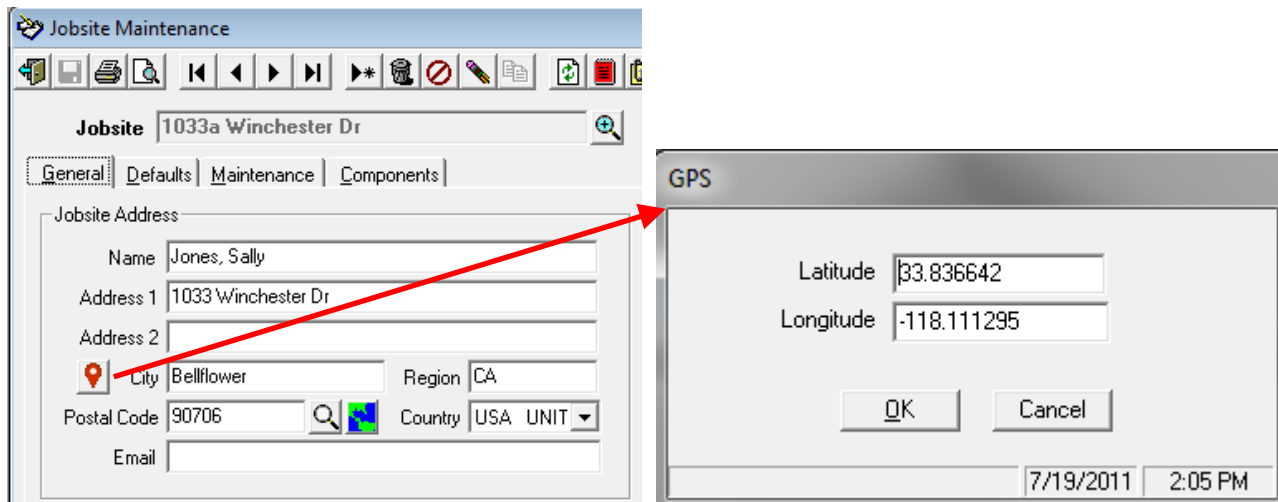
3/15/2011 12:18 PM

Ascente 3.7 Enhancements/Fixes

Mapping/GPS – New Feature

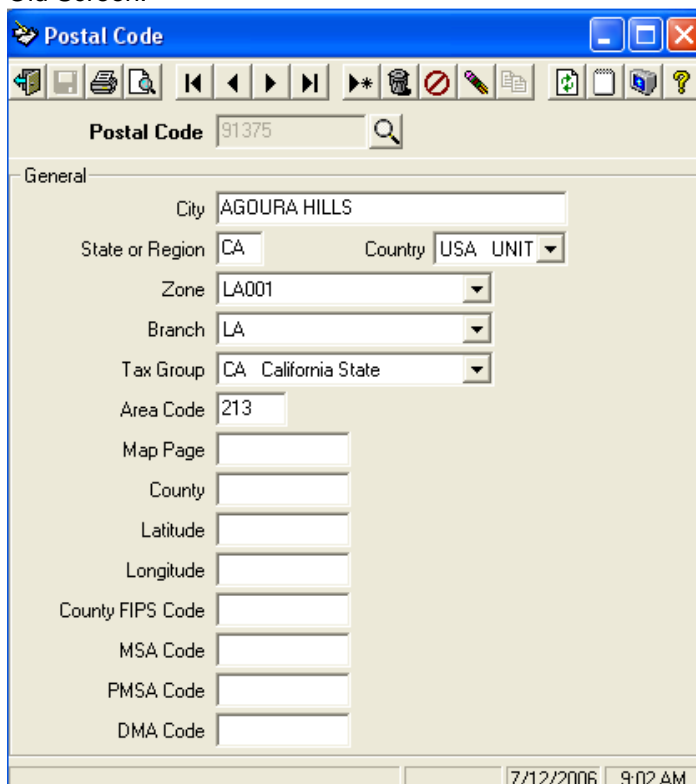
The Jobsite and Call Taking screens have a new GPS button  in the Address panel that will allow the user to display and edit the Latitude and Longitude of the Jobsite address. The button will be black (as shown above) if there are no Latitude or Longitude values for the jobsite. It will appear in red if there are entries.

A new Ascente GPS Service will be installed on your server that will read through your service calls and attempt to get the Latitude/Longitude for the Jobsites and store this information in these new fields. If you do new construction work where an address currently isn't available, you can manually enter the latitude/longitude in these fields.



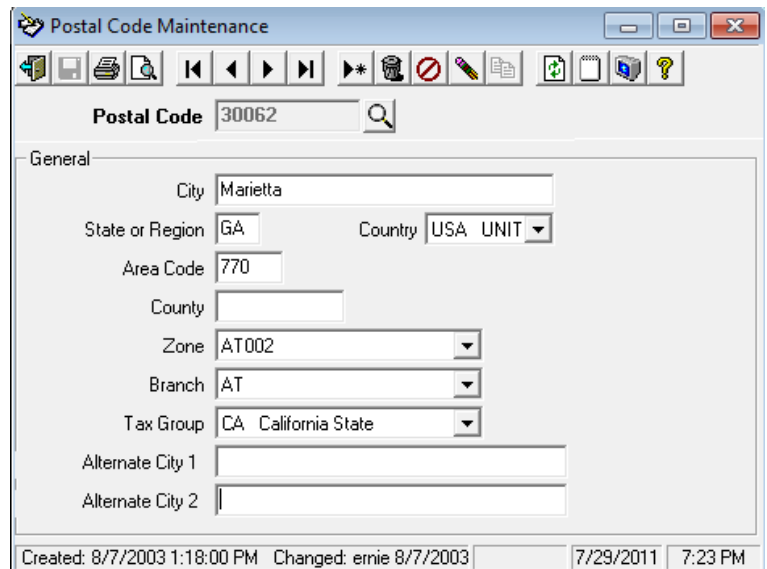
The screenshot shows the 'Jobsite Maintenance' window with the 'General' tab selected. The 'Jobsite Address' section includes fields for Name, Address 1, Address 2, City, Region, Postal Code, Country, and Email. A red arrow points from the 'City' field to a 'GPS' dialog box. The 'GPS' dialog box contains fields for Latitude and Longitude, with 'OK' and 'Cancel' buttons. The dialog box also shows a timestamp: 7/19/2011 2:05 PM.

Related to this we have also changed the Postal Code Maintenance program:
Old Screen:



The screenshot shows the 'Postal Code Maintenance' window with the 'General' tab selected. The 'Postal Code' field is set to 91375. The 'General' section includes fields for City, State or Region, Country, Zone, Branch, Tax Group, Area Code, Map Page, County, Latitude, Longitude, County FIPS Code, MSA Code, PMSA Code, and DMA Code. The timestamp at the bottom is 7/12/2006 9:02 AM.

New Screen:



The screenshot shows the 'Postal Code Maintenance' window with the 'General' tab selected. The 'Postal Code' field is set to 30062. The 'General' section includes fields for City, State or Region, Country, Area Code, County, Zone, Branch, Tax Group, Alternate City 1, and Alternate City 2. The timestamp at the bottom is 7/29/2011 7:23 PM.

Ascente 3.7 Enhancements/Fixes

The new Alternate City 1 & 2 fields will be used for GPS purposes. The Postal Code Report has also been changed to reflect the field changes.

In addition to the above, the following new menu items have been added to the Service Dispatch menu:

- Maintenance, Option & Interfaces (Mapping) – basic mapping settings:

Open Status	Open Mapped Status	Open Not Mapped Status	Arrived Status	Radius
Open	Open - Mapped	Open - Not Mapped	Arrived	0.50

3/5/2012 9:47 AM

- Maintenance, Map Favorites – default map settings:

Favorite	Center Latitude	Center Longitude	Map Provider	Zoom Value	Scale Value	Icon Refresh Rate	Branch	Supervisor
Primary	33.901567	-117.902826	MapQuest	5	1	120,000	(None)	(None)

3/5/2012 9:47 AM

- Maintenance, Map Provider – map provider information:

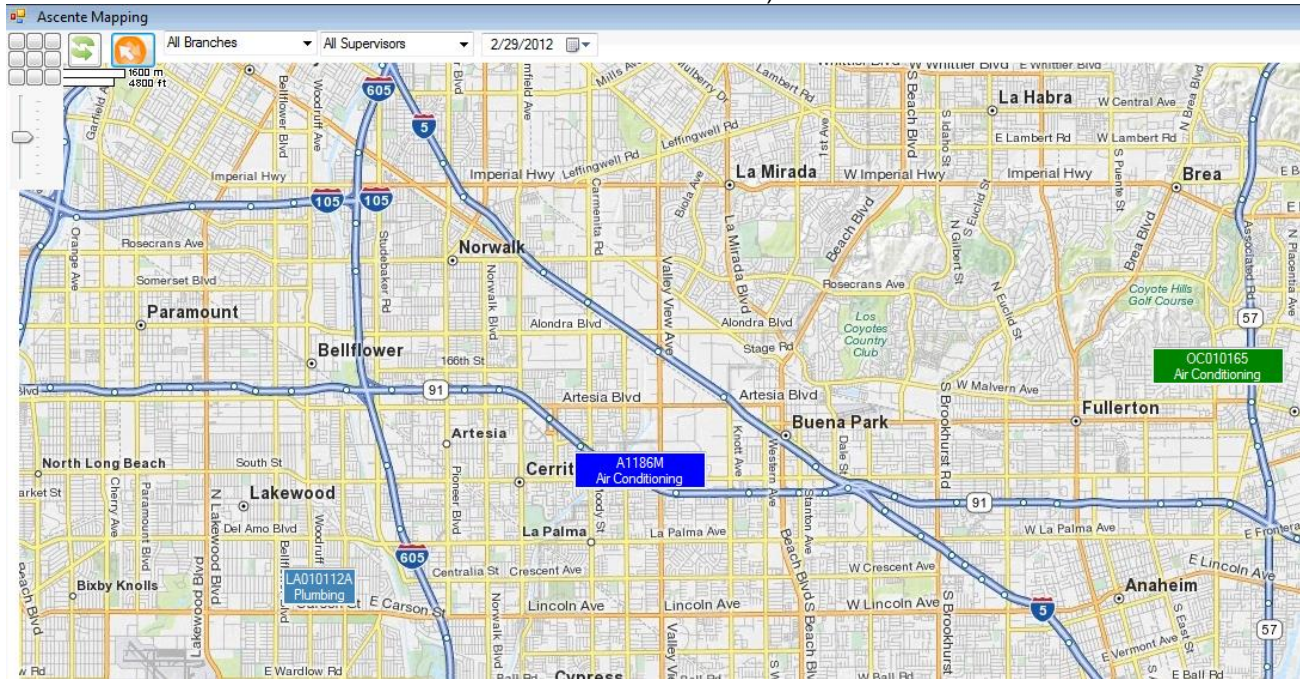
Map Provider	Active	Geocode Landmarks	Map Jobsite Locations	Map Vehicle Locations	Log Transactions	Delay in Seconds	Account Number	Login	Password	Uri Geo Request Prefix	Uri Geo Request Suffix	Uri Map Request Prefix
MapQuest	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	120	299961	admin	admin	http://www.mapquest.com	tkey=6mjd47Cuu2n9L	http://www.mapquest.com
Teletrac	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>							

- Maintenance, Map Provider Icon – map icon settings:

Map Provider	Map Icon	Icon Identifier	Comment
MapQuest	Arrived	green	Arrived - making \$'s
MapQuest	Dispatch	steelblue	In Route
MapQuest	Open	blue	Needs a tech
Teletrac	Arrived	322	Arrived - making \$'s
Teletrac	Dispatch	321	In Route
Teletrac	Open	324	Needs a call
Teletrac	Pending	320	Pending (Teletrac)

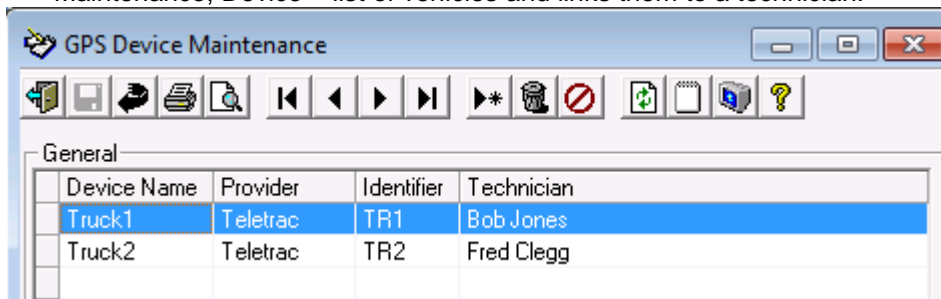
Ascente 3.7 Enhancements/Fixes

- Inquiries, View Map – displays a MapQuest map with your Service Calls and optionally vehicles (if you also have the GPS Interface with either Teletrac or Network Fleet)

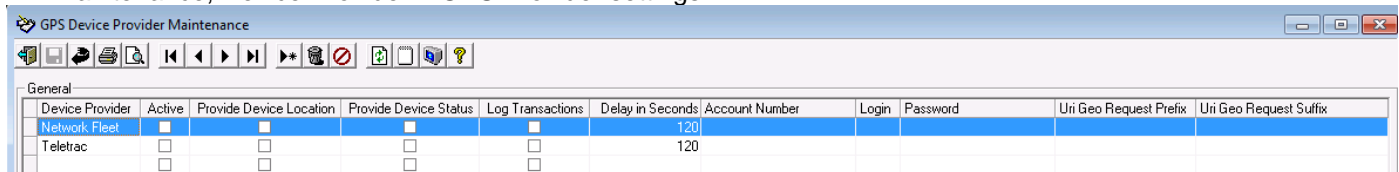


Also, a new GPS menu system has been created for the new Ascente GPS interface. This system allows your vehicles equipped with GPS units from Teletrac or Network Fleet to also be displayed on the new Ascente Map shown above. This menu system has all of the above mapping items, but also includes the following:

- Maintenance, Device – list of vehicles and links them to a technician:



- Maintenance, Device Provider – GPS Provider settings:



The Windows Event Viewer logging for the GPS service now only shows when the service started and stopped (eliminating numerous other messages that were not necessary).

The SQL log tables will now only be updated for the first 60 minutes after the GPS service was started.

A new level has been added to the XML configuration file if the Debug value is set to Y. This can be used by support to diagnose communication issues between the GPS service and the GPS provider.

Added capabilities to interface with **Network Fleet** and **Nextraq**, in addition to the prior interface to **Teletrac**.

Ascente 3.7 Enhancements/Fixes

Jobsite Credit Card Fields changed to be User Defined – New Feature

The fields related to Credit Card information on the Jobsite Defaults tab have now been changed to be User Defined fields. To meet Payment Card Industry (PCI) requirements, you should never store Credit Card information in your system.

Old Jobsite screen:

The screenshot shows the 'Jobsite Maintenance' window with the 'Defaults' tab selected. The 'Jobsite' field is '1033a Winchester Dr'. The 'Credit Information' section on the right contains the following fields: 'Terms Code' (Net30 0% Dis), 'PD Required' (checkbox), 'Purchase Order' (text), 'Credit Card' (text), 'Expiration Date' (text), 'Name' (text), 'Approved Amount' (text), and 'Authorization' (text). These fields are highlighted with a red rectangle. The 'Comments for Service Order' field is also visible below the credit card fields. The status bar at the bottom shows 'Changed: sa 10/15/2009 4:19:23 PM' and '10/19/2009 2:07 PM'.

New Jobsite screen:

The screenshot shows the 'Jobsite Maintenance' window with the 'Defaults' tab selected. The 'Jobsite' field is '1033a Winchester Dr'. The 'Credit Information' section on the right contains the following fields: 'Terms Code' (2%Disc 2% /1), 'PD Required' (checkbox), 'Purchase Order' (text), and 'User Defined' (a group of seven text fields labeled 'User Field 3' through 'User Field 7'). These fields are highlighted with a red rectangle. The 'Comments for Service Order' field is also visible below the user-defined fields. The status bar at the bottom shows 'Changed: sa 10/11/2011 3:11:31 PM' and '11/9/2011 2:04 PM'.

Ascente 3.7 Enhancements/Fixes

When the system installs, the labels for the User Defined fields will be set to the values shown above (User Field 3 through 7). You can set the values for these labels in Service Dispatch, Maintenance, Options and Interfaces (Service), on the User Defined Fields tab:

Service Dispatch Options and Interfaces Maintenance

Service Defaults | Service Options | Dispatch | Scheduling | Maintenance Defaults | Work Order | Invoice | Payroll | **User Defined Fields**

Call Taking Fields

	Caption
User Field 1	Own/Rent
User Field 2	eta/etd
User Field 3	User Field 3
User Field 4	User Field 4
User Field 5	User Field 5
User Field 6	User Field 6
User Field 7	User Field 7

Values

Trouble Fields

	Caption
Column 1	Maint
Column 2	Estimate
Column 3	Call Back
Column 4	Sales

Component Fields

	Caption
Column 2	Coverage Type
Column 3	Exclusions
Column 4	Location
Column 5	2nd warranty

Values

Priority Fields

	Caption
Column 2	Money
Column 3	Manager
Column 4	Customer

Changed: sa 11/9/2011 8:22:31 AM

11/9/2011 2:12 PM

Ascente 3.7 Enhancements/Fixes

The Call Taking and Service Order History screens also reflect these changes:

Call Taking

Service Order: 12345682 Call Taken By: sa Date: 5/10/2011 Time: 04:07 PM

General | **Billing** | Invoice | Tech Log | Scheduling

User Defined

User Field 3
User Field 4
User Field 5
User Field 6
User Field 7

Customer Information

Customer: (Cash) Create Customer...
Name: TEXACO
Address 1: 123 Main St
Address 2: Suite 120
City: Bellflower Region: CA
Postal Code: 90706 Country: USA UNIT
Phone: (714) 222-3333 Fax:
Email: email@anywhere.net

Invoice

Summarize: All
Invoice Print: Standard
Invoice Method: Time & Material
Price: 0.00 Salesperson: GJL Gregg Jo
Tax Group ID: CA California Dist Code: D001 Domestic
Cust Level: (None) Price ID: (None)
Mat'l Price Break: (None) Currency ID: USD US Doll

Maintenance
Maint. Contract:
Maint. Date: Labor Grade:

Job Cost
Job:

Created: 5/10/2011 4:07:08 PM Changed: sa 10/28/2011 1:28:09 PM 11/9/2011 2:14 PM

Service Order History Inquiry

Service Order History: A1050M Call Taken By: Maintenance Date: 3/3/2005 Time: 09:04 AM

General | **Billing** | Invoice | Tech Log

User Defined

User Field 3
User Field 4
User Field 5
User Field 6
User Field 7

Customer Information

Customer: Son009
Name: SonicView Systems Inc.
Address 1: 4619 Harvard St.
Address 2:
City: Minneapolis Region: MN
Postal Code: 55111 Country: USA UNIT
Phone: (612) 375-8124 Fax:
Email:

Invoice

AR Batch: 1108 Date: 11/8/2011
Summarize: All
Invoice Print: Standard
Invoice Method: Time & Material
Price: 0.00 Salesperson: GJL
Tax Group ID: CA Dist Code: D001
Cust Level: Price ID:
Mat Price Brk: Currency ID: DOLLAR

Maintenance
Maint. Contract: A
Maint. Date: 11/1/2004 Labor Grade: Journeyman

Job Cost
Job:

11/9/2011 2:15 PM

In addition, all reports and views that use these fields have been changed to use the captions that you define for these custom fields.

Paging, Maintenance, Dispatch Paging Fields has also been changed to show the captions that you define for these custom fields.

Ascente 3.7 Enhancements/Fixes

Component Lookup – User Defined field labels now displayed - New Feature

Throughout the system, the Component lookup now displays the captions defined in the Service Dispatch, Maintenance, Options and Interfaces (Service), User Defined Fields tab for the Component fields, instead of having headings of User Field #1-#4

The screenshot shows the 'Service Dispatch Options and Interfaces Maintenance' window with the 'User Defined Fields' tab selected. The 'Component Fields' section is highlighted with a red box. A red arrow points from this box to the 'Jobsite Component' lookup window, which also has a red box around the field labels: Coverage Type, Exclusions, Location, and 2nd warranty.

Service Dispatch Options and Interfaces Maintenance

Service Defaults | Service Options | Dispatch | Scheduling | Maintenance Defaults | Work Order | Invoice | Payroll | User Defined Fields

Call Taking Fields

	Caption
User Field 1	Own/Rent
User Field 2	eta/etd
User Field 3	User Field 3
User Field 4	User Field 4
User Field 5	User Field 5
User Field 6	User Field 6
User Field 7	User Field 7

Trouble Fields

	Caption
Column 1	Maint
Column 2	Estimate
Column 3	Call Back
Column 4	Sales

Component Fields

	Caption
Column 2	Coverage Type
Column 3	Exclusions
Column 4	Location
Column 5	2nd warranty

Priority Fields

	Caption
Column 2	Money
Column 3	Manager
Column 4	Customer

Changed: sa 11/9/2011 8:22:31 AM | 11/10/2011 10:22 AM

Jobsite Component

Lookup

Serial Number	Install Date	Warranty Date	Contract End	Contract	Coverage Type	Exclusions	Location	2nd warranty
			3/26/2033	Holt				

1 Record(s) Found | 11/10/2011 10:22 AM

Ascente 3.7 Enhancements/Fixes

Flat Rate, Periodic, Preliminary Flat Rate Import Tasks

A new Starting Position field had been added so that Collier files can be imported. For Collier the Starting Position must to be set to 2.

Job Cost, Maintenance, Job

The size of the Job Bill Breakdown description was increased to 250 characters. The Contract Bill invoice formats have also been changed to allow the printing of this larger size. Note that if you have customized versions of the Job Cost invoice formats, they may have to be modified to take advantage of this change.

Job Cost, Journals, Inventory to Job

Made the following enhancements to the Inventory to Job Register (ICJobRegister.rpt):

- Removed \$ signs
- Removed leading zeros
- Added a grey group header
- Suppressed the printing of phase if phase is blank
- Added dotted lines between records
- Increased the size of the description field
- Example:

04/26/11 1:47 pm		Compusource Corporation Inventory to Job Register G/L Posting Date: 4/26/2011				Page 1 of 1	
Item	Item Description	Location	Cost Code	G/L Acct	Quantity	Unit Cost	Extended Cost
Job: 999.9 Jones, Sally							
100	Flex Hoses	MD0001	3001	00-000-1230	1.00	326.19	326.19
Job/Phase Total:							326.19
Report Total:							326.19

Job Cost, Periodic, Relieve Work in Process

Changed the Relieve Work in Process register to sort by Job and then Phase.

Ascente 3.7 Enhancements/Fixes

Job Cost, Reports, Certified Payroll

Made the following enhancements to the Certified Payroll report (CertifiedPayroll.rpt):

- Removed leading zeros
- Removed dollar signs
- Aligned and right justified numeric columns and column descriptions
- Enlarged fields when possible
- Added lines and shading to enhance readability
- Example:

11/14/11

10:07 am

Continental Products Unlimited

Certified Payroll Report

11/1/10 to 11/7/10

Page 1 of 1

Name, Address		Week Ending		Total	Rate of	*Gross Earned*		Fed	State	SDI	VAC	Other	Total	Net	Check
Union	Class	11/7/10		Hours	Pay	Project	Total	Tax	Tax			DED	DED	Wages	Number
Job #:	J1234	Steve Shea Bathroom Addition				Phase: All Phases									
Midway, Test C		RT	OT	37.00	32.90	1,447.60	2,794.75	.00	.00	.00	.00	48.58	48.58	2,746.17	123478
501 N Hamilton Ave		Mon	8.00	2.00											
Edina , MN 55435		Tue	5.00	.00											
		Wed	8.00	.00											
SS#: XXX-XX-1099	S0	Thu	.00	5.00											
72	MSJ	Fri	4.00	.00											
		Sat	3.00	.00											
		Sun	.00	2.00											
Bourne, Linda C		RT	OT	13.00	29.40	382.20	2,315.33	10.56	3.52	23.15	50.00	104.19	122.13	313.55	2,001.78
501 N Hamilton Ave		Mon	.00	.00											
Edina , MN 55435		Tue	.00	.00											
		Wed	.00	.00											
SS#: XXX-XX-1099	M4	Thu	5.00	.00											
Local 1	BJ	Fri	.00	.00											
		Sat	8.00	.00											
		Sun	.00	.00											

Job Cost, Reports, Job Reports, Job Listing Report

Added Job Status as a range selection.

Ascente 3.7 Enhancements/Fixes

Job Cost, Reports, Job Cost Detail with Burden

Made the following enhancements to the Job Cost Detail with Burden report (JobCOSTDetailWithBurden.rpt):

- Removed leading zeros
- Lightened the shading of the groups for readability
- Added dotted lines between detail records for readability
- Example:

4/26/11 2:13 pm		Compusource Corporation Job Cost Detail Report with Fringe and Burden								Page 1 of 1	
Date	Code	Source	Description	Reference	Ref Desc	PO #	Fringe	Burden	Raw Labor	Total Labor	Labor+Fringe
999.9	My test job			Open	Start: 11/16/04	Complete:					
5/08/07	All Labor	PA	REG 5/8/2007	BOU001	Bourne, Linda		8.00	10.00	20.00	38.00	28.00
5/08/07	All Labor	PA	REG 5/8/2007	BOU001	Bourne, Linda		8.00	10.00	20.00	38.00	28.00
9/19/08	All Labor	PA	P02 9/19/2008	Louie	Orbiso, Louie		.00	.00	35.80	35.80	35.80
5/27/09	All Labor	PA	REG 5/1/2009	BOU001	Bourne, Linda		352.00	.00	88.00	440.00	440.00
5/27/09	Pre fab labc	PA	REG 5/29/2009	BOU001	Bourne, Linda		240.00	.00	60.00	300.00	300.00
5/27/09	Pre fab labc	PA	REG 5/28/2009	BOU001	Bourne, Linda		352.00	.00	88.00	440.00	440.00
5/27/09	Pre fab labc	PA	REG 5/27/2009	BOU001	Bourne, Linda		352.00	.00	88.00	440.00	440.00
5/27/09	Pre fab labc	PA	REG 5/26/2009	BOU001	Bourne, Linda		352.00	.00	88.00	440.00	440.00
1/14/11	All Labor	PA	REG 1/14/2011	BOU001	Bourne, Linda		352.00	.00	88.00	440.00	440.00
Total: 999.9							2,016.00	20.00	575.80	2,611.80	2,591.80
Grand Total:							2,016.00	20.00	575.80	2,611.80	2,591.80

Job Cost, Reports, Sales and Use Tax

The option originally called Service Sales and Use Tax on the Service Dispatch Reports menu has been added to the Job Cost Reports menu and renamed to Sales and Use Tax. This option has also been renamed on the Service Dispatch Reports menu.

Pricing, Periodic, Price and Cost Update Register

Price and Cost Update report enhancements (PriceCostUpdate.rpt):

- Added variance amount and percentage
- Negative amounts will print in red
- Suppressed the printing of the user defined fields line if they are not being used in order to make the report shorter
- Added shading to the new price column and lines between records
- Added a cross-tab table at the end to list item counts by location and product line

7/19/11
2:28 pm

Compusource Corporation
Price and Cost Update
Update Base Price From Base Price Using Percent of 5.00

Page 2 of 2

Item	Description	Location	Uom	Base Price			
				Original	New	Change	Var %
AA0000	***** THERMOSTAT REPAIR AND REPLACE	Product Line: CA0001	Task Each	129.730000	136.216500	6.486500	5.00
			Locations	Items	Product Lines	Items	
			CA0001	1	Task	1	
			Total	1	Total	1	

Ascente 3.7 Enhancements/Fixes

Quotes, Reports, Quote Reports – Quote Variance Report

Added Department as a new range selection option:

The screenshot shows the 'Quote Reports' window with the 'Quote Variance' report selected. The 'Range Selection' table lists various fields with their 'Beginning' and 'Ending' values. The 'Department' field is highlighted with a blue selection bar. The 'Field Selections' section shows 'Quote Variance' as the selected report name. The 'Options' section has a checkbox for 'Print Options Cover Page' which is unchecked. The status bar at the bottom right shows the date '8/20/2012' and time '1:04 PM'.

	Beginning	Ending
Jobsite	(Beginning)	(Ending)
Customer	(Beginning)	(Ending)
Service Order	(Beginning)	(Ending)
Entry Date	(Beginning)	(Ending)
Proposal Date	(Beginning)	(Ending)
Complete Date	(Beginning)	(Ending)
Schedule Date	(Beginning)	(Ending)
Other Date	(Beginning)	(Ending)
Invoice Date	(Beginning)	(Ending)
Department	Air Conditioning	Qmbing

Field Selections: Report Name: Quote Variance

Options: ☐ Print Options Cover Page

8/20/2012 1:04 PM

Quotes, Reports, Quote Reports – Quote Listing Report

Added Customer as a new range selection option:

The screenshot shows the 'Quote Reports' window with the 'Quote Listing' report selected. The 'Range Selection' table lists various fields with their 'Beginning' and 'Ending' values. The 'Customer' field is highlighted with a blue selection bar. The 'Field Selections' section shows 'Quote Listing' as the selected report name. The 'Options' section has a checkbox for 'Print Options Cover Page' which is unchecked. The status bar at the bottom right shows the date '3/28/2013' and time '6:53 PM'.

	Beginning	Ending
Quote	(Beginning)	(Ending)
Sales Rep	(Beginning)	(Ending)
Quote Type	(Beginning)	(Ending)
Proposal Status	(Beginning)	(Ending)
Customer	ABBOT58082	Qmbing
Jobsite	(Beginning)	(Ending)
Entry Date	(Beginning)	(Ending)
Proposal Date	(Beginning)	(Ending)
Complete Date	(Beginning)	(Ending)
Schedule Date	(Beginning)	(Ending)

Field Selections: Report Name: Quote Listing

Options: ☐ Print Options Cover Page

3/28/2013 6:53 PM

Quotes, Transactions, Quotes

Added a new Markup field to the detailed tab of the Quote. The system will display the factor used in arriving at the Unit Price from the Unit Cost. This will be recalculated if the user changes the Unit Price. If the Unit Cost is changed, the Unit Price will be calculated using the existing Markup.

Ascente 3.7 Enhancements/Fixes

Quote Entry

Quote: **OC10000Q** Entry Date: **3/5/2010** Service Order: [LA010072A](#) Create...

Description: **10 Ton Package A/C Estimate**

Sales: 11,062.50
Cost: 5,437.00
Profit: 5,625.50 51%

Main | Billing | Marketing | Detail | Totals | Activity

Item ID: **AC10** Description: **10 Ton AC System** Additional Description: QK Undo

Bill Type	Quantity	Unit Cost	Extended Cost	Markup	Unit Price	Extended Price	Skip WO
Material	2.000000	2,000.000000	4,000.00	1.500	3,000.000000	6,000.00	<input type="checkbox"/>

Line	Item ID	Description	Bill Type	Quantity	Unit Price	Extended Price	Unit Cost
1	Labor	Labor	Labor	16.00	50.00	800.00	25.00
2	AC10	10 Ton AC System	Material	2.00	4,000.00	8,000.00	2,500.00
3	New line		Material	1.00	0.00	0.00	10.00

Also changed the system to allow the user to always override the Unit Cost, even for stock items. This way you can estimate the future cost of an item when presenting a Quote to a customer.

Also changed the system to be able to specify which of your custom Proposal Forms (if multiple custom formats exist) should appear as the default when printing a Proposal from the Quote Form. NOTE: Your Customer Service Representative will need to set this for you.

In addition, the Proposal Form was changed to allow for the printing of the Component information.

Service Dispatch, Inquiries, Work Order History

Changed the Work Order History screen to allow you to resize the form so you can see more of the grid. The system will also save the form size and position by user. This way if you resize the Work Order History form and move it around on your screen, the next time you display the form the system will make it be the same size and in the same position.

Ascente 3.7 Enhancements/Fixes

Service Dispatch/Job Cost, Journals, A/P Register

Made the following enhancements to the A/P Register (ApRegister.rpt):

- Added Tax Class on the detail lines
- Added Invoice, debit memo and total transaction count at the bottom of the report
- Added Invoice and debit memo total dollars
- Removed some vertical blank space so more data would fit on a page
- Example:

9/30/11
2:10 pm

Compusource Corporation
A/P Register

Page 1 of 1

Transaction Id: 00000129
Vendor Id: Ace001
Invoice Number: 1a
Transaction Type: Invoice

Ace Computer Power Supply

Invoice Date: 09/30/2011
G/L Date: 09/30/2011
Invoice Status: Released for Payment

PO Number:
Terms: 2% Disc
Distribution: D001
Tax Group: MN

Taxable: Yes
1099 Invoice: Yes

GL Acct #	Description	Item	Description	Tax Cls	Loc ID	Unit	Qty	Unit Cost	Ext Cost			
00-000-1200	Raw Materials		test	0		Each	1.00	10.00	10.00			
<hr/>												
Invoice Totals	Ext Cost:	10.00	Sales Tax:	.00	Amt 1:	9.80	Date 1:	10/30/2011	Prepaid:	.00	Discount:	0.20
	Invoice Total:	10.00	Freight:	.00	Amt 2:	.00	Date 2:		Check No:		Disc Date:	10/10/2011
			Misc:	.00	Amt 3:	.00	Date 3:		Check Date:			

Transaction Id: 00000130
Vendor Id: ACME01
Invoice Number: 2a
Transaction Type: Debit Memo

Acme Rents

Invoice Date: 09/30/2011
G/L Date: 09/30/2011
Invoice Status: Released for Payment

PO Number:
Terms: Net10
Distribution: D001
Tax Group: AL

Taxable: No
1099 Invoice: Yes

GL Acct #	Description	Item	Description	Tax Cls	Loc ID	Unit	Qty	Unit Cost	Ext Cost			
01-001-7100	Warranty Expense		Test	0		Each	1.00	20.00	20.00			
<hr/>												
Invoice Totals	Ext Cost:	20.00	Sales Tax:	.00	Amt 1:	20.00	Date 1:	11/29/2011	Prepaid:	.00	Discount:	0.00
	Invoice Total:	20.00	Freight:	.00	Amt 2:	.00	Date 2:		Check No:		Disc Date:	10/30/2011
			Misc:	.00	Amt 3:	.00	Date 3:		Check Date:			

Grand Totals	Ext Cost:	(10.00)	Sales Tax:	.00	Invoices:	1	10.00	Prepaid:	.00	Discount:	0.20
	Invoice Total:	(10.00)	Freight:	.00	Debit Memos:	1	20.00				
			Misc:	.00	Transactions:	2					

Service Dispatch/Job Cost, Journals, G/L Register

Added the ability to select by Source code when running the G/L Register:

G/L Register

Select Report Values

Range Selection

Beginning	Ending
Transaction Date (Beginning)	(Ending)
Source (Beginning)	(Ending)

Report Options

☐ Only Include Transactions for sa

Register

Update

10/6/2011 12:48 PM

Ascente 3.7 Enhancements/Fixes

Service Dispatch/Job Cost, Journals, Timecard Register

A new Cutoff Date function has been added to the Timecard Register. The Cutoff Date will default to today's date but can be adjusted by the user. Only those transactions with a Work Date less than or equal to the Cutoff Date will be selected for the Register and the Update.

Also made the following enhancements to the Timecard Register report (TimecardRegister.rpt):

- Removed \$ signs
- Removed leading zeros
- Added dotted lines between records
- Left aligned many of the fields that were center aligned
- Aligned the header labels with the data
- Standardized the formatting with other reports
- Example:

07/29/11
7:40 pm

Compusource Corporation

Page 1 of 1

Timecard Register

G/L Posting Date: 7/29/2011

Cutoff Date: 7/29/2011

Current Payroll Year: 2011

Work Date	Union	Skill	Pay Rate	Pay Code	Pay Type	Job/ SO	Phase/ WO	Cost Code	Hours	Dollars Charged	Lab Cts	Dep.	Withholdg			Work Comp
													St	Loc	Sui	
Employee:		BOU001	Bourne, Linda													
07/15/11			50.00	REG	Internal Time	Bolton	69-500-1234	Division 69 Dr	1.6667	83.34	Prs	500	MN	MN	Plumbe	
07/15/11			50.00	REG	Internal Time	Bolton	69-500-1234	Division 69 Dr	1.0000	50.00	Prs	500	MN	MN	Plumbe	
07/15/11			50.00	REG	Internal Time	Bolton	69-500-1234	Division 69 Dr	1.0000	50.00	Prs	500	MN	MN	Plumbe	
07/15/11			50.00	REG	Internal Time	Bolton	69-500-1234	Division 69 Dr	1.0000	50.00	Prs	500	MN	MN	Plumbe	
07/17/11			50.00	REG	Internal Time	Bolton	69-500-1234	Division 69 Dr	4.0000	200.00	Prs	500	MN	MN	Plumbe	
Employee Total:									8.6667	433.34						
Grand Total:									8.6667	433.34						

Service Dispatch, Journals, Service Order Workflow Register

Added Jobsite as a new range selection.

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Maintenance, Jobsite

Added Install Date and Extra Date to the Jobsite Component lookup:

Jobsite Component

Lookup

Component	Description	Manufacturer	Model	Warranty Date	Serial Number	Contract	User Defined 2	Contract End	User Defined	User Defined	Install Date	Extra Date
ABC	Install a 50 c											
AC1	test					Service		8/31/2007				
AC2	test			8/16/1999		Full Coverage		11/18/2008			8/16/1999	8/16/1999
AC3	Description	Manufacture A	Model AB	2/28/1999	012345	Service		8/31/2007			3/3/1997	7/27/1999
AC4	10ton rooftop	carrier	Model XY	12/31/2001	678910	Heating		3/31/2005			1/1/1999	7/30/1999
AC5	5ton Unit	Carrier	Model XY	12/31/2001	678910	Service		8/31/2007			1/1/1999	7/30/1999

Also changed the Billing Tab of a contract to default the Bill Type from the Contract Defaults Bill Type.

Jobsite Maintenance

Jobsite: 1033a Winchester Dr

Contract: AC1 *Expired*

General Defaults Billing Service Budget Components

Defaults for: Billing

Trouble: Maintenance

Call Type: Drain Cleaning

Problem: Maintenance

Service Order: Branch: LA, Department: Air Conditioning, Technician: (Unassigned), SO Status: Open, Salesperson: GJL Gregg Joseph Lukeski

Summarize: Labor

Maintenance: Maint-Billable

Invoice Print: Standard

Bill Type: Maintenance

WD Status: Open

Tax Group ID: CA California, Terms Code: Net30 0% Dis

Customer Level: (None), Price ID: (None)

Purchase Order:

Changed: sa 10/15/2010 8:41:17 AM F6 Maint 4/26/2011 2:39 PM

Jobsite Maintenance

Jobsite: 1033a Winchester Dr

Contract: AC1 *Expired*

General Defaults Billing Service Budget Components

Billing Frequency	Contract Amount	Start	End	Next Creation	Bill Type	Amortizatic Frequency
Monthly	100.00	3/3/2005	3/3/2006	4/3/2006	Maintenance	(None)

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Maintenance, Technician

Added a new Display Days field to the Tech Log tab of Technician Maintenance. This will default to 7 days, thus causing the system to only display the past 7 days of activity for the selected Technician. This greatly speeds up the display of this form when hundreds of transactions exist for the Technician. The user can override this value and the new value will be saved.

The screenshot shows the 'Technician Maintenance' window with the 'Tech Log' tab selected. The 'Technician' field is set to 'Bob Jones'. The 'Display Days' field is highlighted with a red box and contains the value '90'. Below this is a table of activity logs.

Date	Time	Service Order	Status	Work Order	Comment	User	Last Updated
5/9/2012	9:05:05 AM	A1025	Lunch	A1025W		sa	5/9/2012 9:05:12 AM
5/9/2012	8:53:14 AM	LA200153M	Dispatch	LA200153M		sa	5/9/2012 8:53:33 AM
5/8/2012	6:54:02 PM	A1025	Dispatch	A1025W		sa	5/8/2012 6:54:13 PM
5/8/2012	5:21:49 PM	A1025	Lunch	A1025W		sa	5/8/2012 5:21:58 PM
5/8/2012	4:55:12 PM	A1025	Dispatch	A1025W		sa	5/8/2012 4:55:27 PM
4/16/2012	3:08:26 PM	A1025	Open - Mapped	A1025		AscenteGPS	4/16/2012 3:08:26 PM
4/16/2012	9:44:24 AM	12345681	Closed	12345681A	12345681A	sa	4/16/2012 9:44:56 AM

Service Dispatch, Maintenance, Unit of Measure

The Unit of Measure option from the Job Cost, Maintenance menu has now also been added to the Service Dispatch, Maintenance menu.

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Periodic, Create Maintenance Service Orders

Previously the system was hard coded to only allow you to create Maintenance Service Orders up to 60 days in the future. This restriction has been removed and you can now set your own limit. A new field has been added to the Service Dispatch Options & Interface, Maintenance Defaults tab to let you define this limit. On installation this will be set to 60.

The screenshot shows a software window titled "Service Dispatch Options and Interfaces Maintenance". It has a menu bar with options: Service Defaults, Service Options, Dispatch, Scheduling, Maintenance Defaults (selected), Work Order, Invoice, Payroll, and User Defined Fields. Below the menu bar, there are two main sections: "Defaults" and "Material Defaults". In the "Defaults" section, several dropdown menus are visible: Trouble (Maintenance), Bill Type (Maintenance), Service Order Status (Open), Work Order Status (Open), Maintenance (Maint-Billable), Tax Class (1 Resale Goods), and Ad (Customer). At the bottom of the "Defaults" section, there is a field labeled "Create Maint SO's Out" with a value of "90 days", which is highlighted by a red rectangular box. The "Material Defaults" section includes a checkbox for "Bill Material Separately" (unchecked), and dropdown menus for "Bill Type", "Tax Class", and a text field for "Item Description".

Changed the Exceptions Log report to note if the credit card was not charge the full amount of the invoice:

The screenshot displays a report titled "Computer Products Unlimited Log Exceptions Report". The report header includes the date "3/06/11", time "4:12 pm", and "Page 1 of 1". The report content is as follows:

Exceptions for: Create Maintenance Service Orders		**** Exceptions During Update ****	
Run Date & Time: 20110306161207		User: karen	
Exception: Jobsite: TEXACO Office building	Contract: Air	Next Create Date: 1/15/2011	Maintenance Amt: \$13.17
ServiceOrder: DEF-021		Credit Card Charge: XXXXXXXXXXXX6781 MasterCard 12/15	
Credit Card was not charged the full amount of \$13.17 but charged the approved amount of \$5.32.			

Ascente 3.7 Enhancements/Fixes

Also changed the Create Maintenance Service Orders Report (CreateMaintSO.rpt) to have a new column that lists the budgeted hours:

4/26/11
4:13 pm

DLR Service Company Create Maintenance Service Orders

Page 2 of 3

Jobsite Name	Jobsite	Contract	Cust ID	Maint Date	SO Status	WO Status	SO Type	Maint Price	Svc	Hours	Bill	Creditcard Payment	Material
Smith, Clyde	456 Main St	AC	BakerS	1/01/11	PM	Open	Air Conditioning	.00	S	1.00			
Smith, Clyde	456 Main St	AC	BakerS	2/01/11	PM	Open	Air Conditioning	.00	S	1.00			
Smith, Clyde	456 Main St	AC	BakerS	3/01/11	PM	Open	Air Conditioning	.00	S	1.00			
Smith, Clyde	456 Main St	AC	BakerS	4/01/11	PM	Open	Air Conditioning	.00	S	1.00			
Smith, Joe Jr	6699 Main Street	AC	(Cash)	4/01/11	PM	Open	Air Conditioning	.00	S	1.00			
Weber, Joe	715 Webinar Rd	ac	ApexCorp	10/01/10	Closed	Closed	Air Conditioning	100.00		1.00	B	100.00	
Weber, Joe	715 Webinar Rd	ac	ApexCorp	11/01/10	Closed	Closed	Air Conditioning	100.00			B	100.00	
Weber, Joe	715 Webinar Rd	ac	ApexCorp	12/01/10	Closed	Closed	Air Conditioning	100.00			B	100.00	
HVAC Department Totals:				Records Printed: 31				780.00	16		15	.00	.00
Department: Plumbing													
Jones, Fred	123 Maple	HVAC	BakerS	8/01/10	Closed	Closed	Plumbing	100.00		1.00	B	100.00	
Credit Card: XXXXXXXXXXXX6781		VISA	Expiration: 12/15										
Jones, Fred	123 Maple	HVAC	BakerS	8/01/10	PM	Open	Plumbing	.00	S	1.00			
Jones, Fred	123 Maple	HVAC	BakerS	9/01/10	PM	Open	Plumbing	.00	S	1.00			
Jones, Fred	123 Maple	HVAC	BakerS	9/01/10	Closed	Closed	Plumbing	100.00			B	100.00	
Credit Card: XXXXXXXXXXXX781		VISA	Expiration: 12/15										

Ascente 3.7 Enhancements/Fixes

Service Dispatch/Job Cost, Reports, Accounting

Completed the following enhancements to some of the Accounting reports:

- Freight, Misc., Sales Tax and Prepaid amounts are now available for printing on the Accounting A/P Reports (they do not print by default, but the reports can be modified to include these amounts)
- Renamed the following reports to be more consistent:
 - Open Payables Inquiry is now called A/P Open Payables
 - Payables History Inquiry is now called A/P History
 - Payment History Inquiry is now called A/R Payment History
- Added Fiscal year and Fiscal Period to the General Ledger Audit Report – Excel Export version (GLAuditReportDetail-ExcelExport.rpt) to make filtering easier in Excel. Example:

4/26/11
2:18 pm

Compusource Corporation
General Ledger Detail Audit Report - Excel Export

Fiscal Year: 2011 through 2011
Source: M1 through M1

Page 1 of 1

Postrun	Entry #	Account	Acct Description	Year	Prd	SRC	Reference	Posted	Debit	Credit	Comp Description	Comments
20110114091047	23066	000001210	Work in Process	2011	1	M1	adjustment	Y	1.00	.00	CPU G/L Register	Ascente - G/L Register
20110114091047	23067	000001100	Accounts Receivable	2011	1	M1		Y	.00	1.00	CPU G/L Register	Ascente - G/L Register

- Added Bin as a Range option to the Item Count Sheet report (AcctgItemCountSheet.rpt) and added this as a column on the report. Example:

Accounting

Select Report Values
 Range Selection

	Beginning	Ending
Item (Beginning)	(Beginning)	(Ending)
Product Line (Beginning)	(Beginning)	(Ending)
Location (Beginning)	(Beginning)	(Ending)
Bin		D

Field Selections
 Report Name: Item Count Sheet

Options
☐ Print Options Cover Page

4/29/2011 12:55 PM

04/29/11
10:04:02 am

Compusource Corporation
Item Count Sheet

Page 1 of 7

<u>BinNum</u>	<u>Item</u>	<u>Description</u>	<u>Average Cost</u>	<u>Count</u>
Location: CA0001				
Productline: MATERIAL		Location: CA0001		
A-01	0017	Electrodes - Up to 10" GI	16.64	[]
B-5	150	50 Gal Water Heater	902.11	[]
A-2	300	Interior Door	20.17	[]
A-1	350	Entry Door	210.03	[]
Totals for Productline: MATERIAL				Items: 4

Ascente 3.7 Enhancements/Fixes

Service Dispatch/Job Cost, Reports, GL Journal

Added the ability to select based on Source code in the GL Journal reports:

The screenshot shows the 'GL Journal Report' window. Under 'Select Report Values', the 'Range Selection' table is visible. The 'Source' row is highlighted with a red box. The 'Field Selections' section shows 'Report Name' set to 'GL Journal - Detail'.

	Beginning	Ending
Posting Run	20110901101058	(Ending)
Source	(Beginning)	(Ending)

Field Selections
Report Name: GL Journal - Detail

F6 Maint 10/6/2011 12:51 PM

Service Dispatch, Reports, Jobsite Reports, Jobsites by Customer

Added the Customer and Jobsite e-mail addresses to the report.

Service Dispatch, Reports, Maintenance Contracts

Added Customer as a range selection for the following reports:

- Contract Listing
- Contract Listing – Billing
- Contract Listing – Service

The screenshot shows the 'Maintenance Contracts' window. Under 'Select Report Values', the 'Range Selection' table is visible. The 'Customer' row is highlighted with a blue box. The 'Field Selections' section shows 'Report Name' set to 'Contract Listing'. The 'Options' section has a checkbox for 'Print Options Cover Page'.

	Beginning	Ending
Customer	ABBD158082	(Ending)
Jobsite	(Beginning)	(Ending)
Contract	(Beginning)	(Ending)
Contract Start Date	(Beginning)	(Ending)
Contract End Date	(Beginning)	(Ending)
Business Category	(Beginning)	(Ending)

Field Selections
Report Name: Contract Listing

Options
☐ Print Options Cover Page

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Reports, Sales Analysis, Service Invoice History

Added the Work Order Description (Resolution) to all of the Service Invoice History formats.

NOTE: This change uses a special WOHistSummaryDescView that only works in SQL 2008 or greater AND the Ascente database MUST be in SQL 2008 compatibility mode.

Service Dispatch, Reports, Schedule

Added Supervisor as a range selection:

The screenshot shows the 'Schedule' report window. The 'Range Selection' table is expanded, showing the following fields:

	Beginning	Ending
Schedule Date	(Beginning)	(Ending)
Tech	(Beginning)	(Ending)
Branch	(Beginning)	(Ending)
Department	(Beginning)	(Ending)
Supervisor	Smith, Mary	Smith, Mary

Below the table, the 'Field Selections' section shows 'Report Name' set to 'Schedule Report'. The 'Options' section has a checkbox for 'Print Options Cover Page' which is currently unchecked. The status bar at the bottom right shows the date '4/2/2013' and time '3:26 PM'.

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Reports, Payroll Reports, Workmans Compensation from History Report – New Feature

The standard Workmans Compensation Report assumes that all work for an employee will fall under just one Workmans Compensation Code.

If you have employees that work under multiple Workmans Compensation Codes, you can use the new Workmans Compensation from History report to see the actual hours worked by Comp Code. However, there are some items of note with this:

- This report will show the Cafeteria Deduction amount against the default Workmans Compensation Code.
- This report reads the Ascente Timecard History to get the details by Workmans Compensation Code, since Traverse does not store this. Due to this, the operator will be required to enter a Transaction Date Range (in addition to the month, which is required for the Traverse data). The date range needs to be the Work Dates that were Paid in a given month (For example, in February the employee may have been paid for work done on January 25 through February 24).
- Pay transactions entered directly in Traverse will not appear on this report.
- If none of your employees work against multiple compensation codes, then do NOT use this report. Use the original Workers Compensation Report instead.

The screenshot shows the 'Payroll Reports' application window. The 'Range Selection' section has 'Month' set to 2 and 'Transaction Date' from 1/25/2011 to 2/24/2011. The 'Field Selections' section has 'Report Name' set to 'Workmans Compensation Report From History'. The 'Options' section has 'Print Options Cover Page' checked. The status bar at the bottom shows the date 5/13/2011 and time 9:52 AM.

5/13/11 9:49 am		Compusource Corporation Workmans Compensation Report From History February										Page 1 of 2
Empl Code	Employee Name	WC Code	WC Description	Pay Rate	Regular Pay	Adjusted OT Pay	Commission Pay	Cafeteria Ded	Total Adj Pay	WC Rate	Experience Factor	Premium Amount
0003	0003	None		0.00	.00	.00	.00	.00	.00	.0000	.0000	.00
0003					.00	.00	.00	.00	.00	.0000	.0000	0.00
2189	2189	None		0.00	.00	.00	.00	.00	.00	.0000	.0000	.00
2189					.00	.00	.00	.00	.00	.0000	.0000	0.00
Amore1	Amore1	None		0.00	.00	.00	.00	.00	.00	.0000	.0000	.00
Amore1					.00	.00	.00	.00	.00	.0000	.0000	0.00
Amore2	Amore2	None		0.00	.00	.00	.00	.00	.00	.0000	.0000	.00
Amore2					.00	.00	.00	.00	.00	.0000	.0000	0.00
BOU001	Linda Bourne	Plumber	Plumbing less t	15.00	60.00	.00	.00	.00	60.00	10.0000	1.2000	7.20
BOU001	Linda Bourne	SM	Sheet Metal W c	15.00	60.00	.00	.00	.00	60.00	12.0000	1.2000	8.64
BOU001					120.00	.00	.00	.00	120.00	12.0000	1.2000	15.84

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Reports, Service Order Print, Regular Service Order

The system has been changed to pass the first 120 characters of the Problem from the last 5 Service Orders in History for printing on the Regular Service Order. Previously only the first 60 characters were passed.

Added the ability of being able to print Service Order User Fields 3-7 on the report.

Added both the Customer and Jobsite e-mail addresses from the Service Order to the Service Order form.

Service Dispatch, Reports, Technician Reports, Technician Daily News

Added the following new columns to the Technician Daily News Report (TechLogDailyNews.rpt):

- Number of tasks
- Budgeted Labor Hours (from Item Bill of Material)
- Variance (Budgeted Hours – Actual Hours)
- Average \$/task
- Example:

5/11/11 4:12 pm		Continental Products Unlimited Technician Daily News Transaction Date: 1/1/2003 through 12/31/2003										Page 1 of 2				
WorkDate	Start	End	WorkTime	DriveTime	IdleTime	TotalTime	Hrs Billed	# Calls	\$ Calls	Billable %	Tasks Performed	Budgeted Hours	Actual Hours	Variance	Total Sales	Avg Task Amount
Branch OR		Orange County														
Tech John Fig		John Fig														
1/15/03	10:27 am	8:34 pm	.03	.00	8.09	8.12	.00	2	0	.00%	0	.00	.00	.00	.00	.00
1/16/03	7:32 am	11:12 am	.17	3.50	.00	3.67	71.00	1	1	1,934.48%	1	12.00	72.00	-60.00	2,145.70	2,145.70
1/26/03	8:30 am	9:11 am	.01	.00	.87	.88	134.50	4	3	9,811.78%	1	12.00	71.00	-59.00	1,201.50	1,201.50
1/27/03	12:39 pm	5:49 pm	5.12	.05	.00	5.17	.00	0	0	.00%	0	.00	.00	.00	.00	.00
1/28/03	11:12 am	4:12 pm	4.99	.00	.00	4.99	.00	0	0	.00%	0	.00	.00	.00	.00	.00
1/29/03	10:11 am	10:11 am	.00	.00	.00	.00	.00	0	0	.00%	0	.00	.00	.00	.00	.00
3/13/03	6:50 am	6:50 am	.00	.00	.00	.00	.00	0	0	.00%	0	.00	.00	.00	.00	.00
6/19/03	3:25 pm	3:25 pm	.00	.00	.00	.00	.00	0	0	.00%	0	.00	.00	.00	.00	.00
8/6/03	7:58 am	7:58 am	.01	.00	.00	.01	.00	0	0	.00%	0	.00	.00	.00	.00	.00
9/12/03	10:41 am	10:41 am	.00	.00	.00	.00	.00	0	0	.00%	0	.00	.00	.00	.00	.00
9/26/03	10:57 am	10:58 am	.00	.01	.00	.01	.00	0	0	.00%	0	.00	.00	.00	.00	.00
10/1/03	10:43 am	12:03 pm	1.31	.02	.00	1.33	.00	1	0	.00%	0	.00	.00	.00	.00	.00
10/2/03	4:14 pm	4:14 pm	.00	.00	.00	.00	.00	0	0	.00%	0	.00	.00	.00	.00	.00
11/4/03	3:03 pm	3:04 pm	.00	.01	.00	.01	71.00	1	1	5,384.82%	1	12.00	71.00	-59.00	2,145.70	2,145.70
12/29/03	4:54 pm	4:54 pm	.00	.00	.00	.00	.00	0	0	.00%	0	.00	.00	.00	.00	.00
12/30/03	9:11 am	9:11 am	.00	.00	.00	.00	.00	0	0	.00%	0	.00	.00	.00	.00	.00
Total Tech: John Fig			11.65	3.58	8.77	24.00	276.50	9	5	Recs: 16	3.00	36.00	214.00	-178.00	5,492.90	1,830.97
Total Branch:OR			11.65	3.58	8.77	24.00	276.50	9	5	Recs: 16	3.00	36.00	214.00	-178.00	5,492.90	1,830.97

Service Dispatch, Reports, Technician Reports, Technician Log Timecard reports

The Technician Log Timecard and Technician Log Timecard with Service Order Detail reports have been changed to ignore Open and Cancelled type status codes when determining the start of a day for a technician. Now the start of day will be reported as the first transaction that has a Dispatch, Arrive or Closed status.

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Reports, Uncollected Work Orders

This report has been changed to use the standard report range selections and have the ability to print a cover page. Also, a new range option has been added to let you select based on the date the Work Order was pre-assigned.

Uncollected Work Orders Report

Select Report Values

Range Selection

	Beginning	Ending
Branch	LA	
Technician	Brad Graham	Brad Graham
Preassigned Date	(Beginning)	12/31/2005

Field Selections

Report Name: Uncollected Work Orders Report

Options

☐ Print Options Cover Page

9/8/2011 3:51 PM

The following formatting changes were also completed:

- Technician header now prints on each page.
- Sorting is now by Branch, Technician, Work Order, where before it was only Branch, Technician.
- Removed leading zeros.
- Added lines before records to improve readability.

Service Dispatch, Transactions, Call Taking

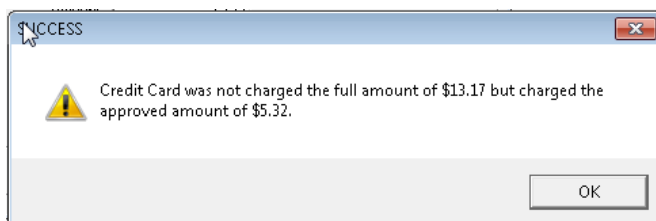
Added Install Date and Extra Date to the Jobsite Component lookup:

Jobsite Component

Lookup

Component	Description	Manufacturer	Model	Warranty Date	Serial Number	Contract	User Defined 2	Contract End	User Defined	User Defined	Install Date	Extra Date
ABC	Install a 50 g											
AC1	test					Service		8/31/2007				
AC2	test			8/16/1999		Full Coverage		11/18/2008			8/16/1999	8/16/1999
AC3	Description	Manufacture A	Model AB	2/28/1999	012345	Service		8/31/2007			3/3/1997	7/27/1999
AC4	10ton rooftop	carrier	Model XY	12/31/2001	678910	Heating		3/31/2005			1/1/1999	7/30/1999
AC5	5ton Unit	Carrier	Model XY	12/31/2001	678910	Service		8/31/2007			1/1/1999	7/30/1999

Also changed to give the user a warning if the X-Charge amount is not equal to the full amount of the invoice:



Ascente 3.7 Enhancements/Fixes

Service Dispatch, Transactions, Call Inquiry and Dispatch

We have added all of the Call Taking lookup buttons to the Call Inquiry and Dispatch Screens:

Technician	Status	Zone	Service Order	Type	Promise Date	Jobsite	Price
(Unassigned)	Open	LA001	A1059M	Air Condition	11/1/2004 Anytime	TEXACO	Hot
(Unassigned)	Open	LA001	LA200033M	Res Inspect	11/5/2004 Anytime	AIRBORNE EXP	Dis

Note that the buttons at the top of the screen are only enabled if you first double click on a call to bring the information into the header portion of the screen.

In addition, if you right click on a call in any of the screens (Call Inquiry, Dispatch Board or Schedule Board), all of the lookup functions are now available on this menu:

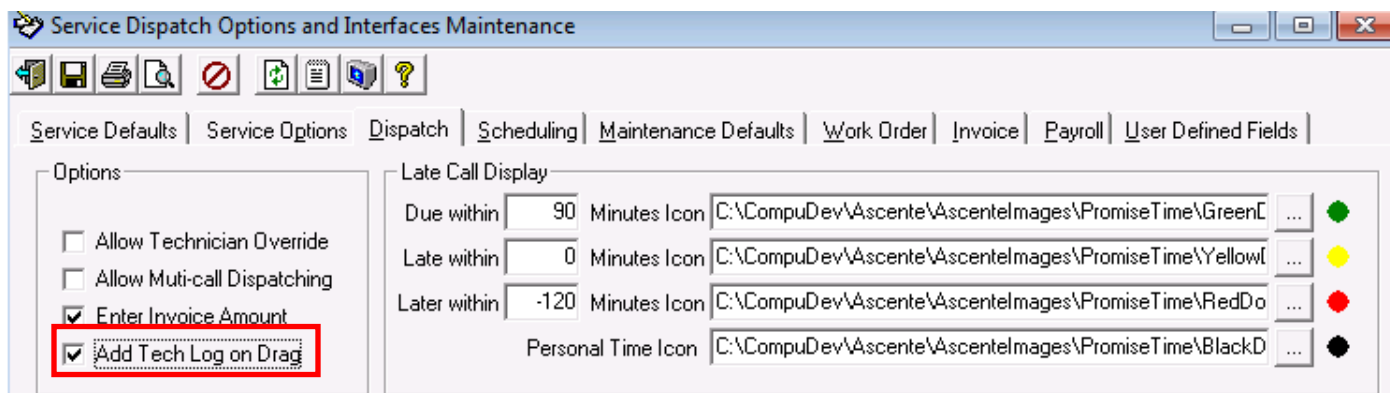
- Select Schedule
- Delete Schedule Shift+Del
- Copy Schedule
- Call Taking
- Notes (None)
- Comments
- Print Service Order
- Page Service Order
- Existing Work Orders
- Quotes
- Maintenance Contracts (EXPIRED)
- Jobsite Components
- Billing Status
- Service History
- AR Customer Inquiry (OVER CREDIT LIMIT)
- All Technician Calls
- Technician Calls This Day

Ascente 3.7 Enhancements/Fixes

In conjunction with this, a new Notes option has been added to the right click menu. This will allow you to access the Notes screen for the selected Service Order. The menu label for this will change depending upon the Notes status as follows:

- Notes (None) No notes exist for the selected Service Order
- Notes Regular notes exist for the selected Service Order
- Notes (Important) Important type notes exist for the selected Service Order (a feature of Notes Pro)
- Notes (Alert User) Alert User type notes exist for the selected Service Order (a feature of Notes Pro)

Also added a new flag to Service Options & Interfaces, Dispatch Tab that determines if a Tech Log record should be added if a call is moved on the Schedule board to a different day/time for the same tech. By default this will be set to add a Tech Log record, as this is how the system worked in the past. If you turn this off, the system will no longer add Tech Log records. Note: If the call is moved to a different Tech, a Tech Log record will still be added.



Service Dispatch/Job Cost, Transactions, Purchase Order

The system now defaults the Location from the Traverse Business Rules, System Manager, Default Location.

Added the ability of being able to print the G/L Expense Account description on the Purchase Order form.

Ascente 3.7 Enhancements/Fixes

Service Dispatch/Job Cost, Transactions, Timecard

The system will now only display cost codes that have a Sales Category of 'Labor'. If not cost codes have this value, the user will get a message saying 'You must create Labor Cost Codes before entering Job Cost transactions. Furthermore, if the new feature 'Only Allow Estimated Cost Codes' is selected in JC Options, and no Labor Estimates have been entered, the user will get a message saying 'You must create Labor Estimates for this Job before entering transactions'.

Both the Cost Group and Cost Code maintenance programs no longer allow (none) as the Sales Category as a result of this change.

NOTE:

When this version of Ascente installs, it checks the Sales Category of all Cost Groups and sets any that have a value of (none) to be Labor. Once complete, all Cost Codes that have a Sales Category of (none) will be set to the Sales Category assigned to the Cost Group. *It is highly recommended that you review the Sales Categories in the Cost Group and Cost Code tables to insure they are accurate.*

Changed Timecard Entry so that Mobile Pro users can see labor posted from prior day's work on a job.

Added the ability to store special overtime and doubletime labor rates by Customer Level in a table called PayrollPayCodeCustomerLevel. If there are entries in this table, when the labor is posted to a Service Order, and the Service Order has been assigned the Customer Level in this new table, the sell price of the labor will be at the rate defined in this new table. At this time your Customer Service Representative will have to set this up for you. We will add the ability for you to maintain this information in a future release.

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Transactions, Work Orders

The system now saves the form size and position by user. This way if you resize the Work Orders form and move it around on your screen, the next time you display the form the system will make it be the same size and in the same position.

Added a new feature where if the Technician or Location are changed on the Main Tab of the Work Order, the user will be asked if they want the existing Work Order Lines to be changed to the new values. This feature will not be enabled by default when the system is installed. To enable this feature go to the Service Dispatch, Maintenance, Options and Interfaces (Service) option and then to the Work Order tab. Check the new 'Allow Tech/Loc Change to Update Lines' box:

Automatic Item ID	Description	Quantity
msr	Test part	1.000000

If the Technician is change the Location will also be changed to the value assign to the Technician in the Technician file. The following dialog will display:

Warning

Do you want to update all existing detail lines with Technician 'Fred Clegg' and Location 'CA0001'?

Yes No

If No is selected, only the Main Tab values will be changed and the Work Order Lines will remain with their current Technician and Location values.

If Yes is selected, all of the existing Work Order Lines will be changed to the new Technician and Location values. If an item doesn't exist in the new location, the system will prompt the user to see if they want to add it. If the user says no to this the location will be reset to the original value and no changes will be made to the location. If there are any problems that occur in changing the line items, the users will be warned that not all detail lines were updated. The user will see the system process each line on the Detail tab and when it is complete, the user will be put back to the Main tab.

A similar dialog to the one above will be displayed if the Location is changed on the Main tab. The only difference is the dialog will not reference the Technician). The same logic as above applies if the user says Yes to change the detail lines.

Ascente 3.7 Enhancements/Fixes

Added a new feature where if the Branch or Department are changed on the Service Order Tab of the Work Order, the user will be asked if they want the existing Work Order Lines GL accounts to be changed to the new values. This feature will not be enabled by default when the system is installed. To enable this feature go to the Service Dispatch, Maintenance, Options and Interfaces (Service) option and then to the Work Order tab. Check the new 'Allow Branch/Department Change to Update Lines' box:

The screenshot shows the 'Service Dispatch Options and Interfaces Maintenance' window with the 'Work Order' tab selected. The 'Options' section on the left contains four checkboxes: 'Set Invoice ID to Work Order ID' (checked), 'Calculate Invoice Amount' (unchecked), 'Allow Tech/Loc Change to Update Lines' (checked), and 'Allow Branch/Department Change to Update Lines' (checked and highlighted with a red rectangle). The 'Defaults' section on the right includes dropdown menus for 'Nonstock Bill Type' (Material), 'Nonstock Tax Class' (Non-taxable), and a text field for 'Variance Item ID'. At the bottom, a table displays work order lines:

Automatic Item ID	Description	Quantity
mst	Test part	1.000000

If the Branch is changed on the Service Order tab of the Work Order, and there are existing Work Order lines, then the following dialog will display:

A 'Warning' dialog box with the following text: 'Changing Branch may have general ledger implications for Sales and Cost of Goods Sold accounts. Do you want to update general ledger accounts for existing work order lines?'. At the bottom are 'Yes' and 'No' buttons.

If No is selected, only the Main Tab values will be changed and the Work Order Lines will remain with their current GL Account values.

If Yes is selected, all of the existing Work Order Lines will have the GL accounts changed to have the new Branch or Department GL overlay. If an account does not exist in General Ledger with the new overlay a warning will be displayed and that line not changed. If there are any problems that occur in changing the lines, the user will be warned that not all detail lines were updated. The user will see the system process each line on the Detail tab and when it is complete, the user will be put back to the Main tab.

A similar dialog to the one above will be displayed if the Department is changed on the Service Order tab. The only difference is the dialog will not reference the Branch). The same logic as above applies if the user says Yes to change the detail lines.

Also changed the PO Info button (Quick PO) to now check for custom fields related to the selected vendor that are an Expiration Date or Expiration Date Verified type. If the date assigned to the vendor for one of these custom fields has passed, the user will get a warning telling them of the situation and either ask or force them to select a new vendor.

Ascente 3.7 Enhancements/Fixes

System, Maintenance, Company

Added a new 'Calculate Discount for Debit Memos' option. If checked, A/P Invoice Entry in Ascente will calculate the discount on Debit Memos.

Company CPU Compusource Corporation

General

Database Ascente36

Payroll Year 2011 CPU2

Accounts Payable

Calculate Discount for Debit Memos ☒

General Ledger

Use Traverse GL Method ☐

Branch GL Segment 1

Department GL Segment 2

Paths

Path for Modified Reports C:\CompuDev\Ascente\ReportsModified

Path for Temporary Reports C:\CompuDev\Ascente\ReportsTemporary

Changed: sa 4/21/2011 11:04:55 AM F6 Maint 4/26/2011 5:52 PM

System, Reports, Log Reports – User Activity Log

Completed the following enhancements to the User Activity Log option:

- ☐ Changed from Landscape to Portrait and removed blank space so reports take less pages.
- ☐ Added a group header by program name (form)
- ☐ Reformatted the time to not include seconds, because it was always 00
- ☐ Added a record counter and line separator to improve readability.
- ☐ Added a new sort option by User. This will sort by User and Activity Date/Time and group by Date. This will allow you to run the report by user and date range to see all activity by a user for that time period.

Ascente 3.7 Enhancements/Fixes

Fixes

General

- **Address Entry:** Fixed a problem where an error would occur if F2 (lookup) was press while in the Address 1 field, but no lookup was available in the current form (ie, Branch). (ECR 33288)
- **Calendar:** Fixed a problem with the Calendar drop down where it would give an error on February 29. (ECR 33079)
- **Closing Ascente:** Fixed a problem where if a form was minimized before saving a record, and you then tried to close Ascente, the system would do nothing. Now the minimized for will be displayed and the user asked if they want to save the changes.
- **Custom Fields:**
 - Fixed a problem throughout the system where a custom field flagged as Required would display 'Beginning' as the column caption for values; it now displays as blank. If a custom field was validated and you entered an invalid value, you would get a message saying '[row caption] Beginning does not exist'. The message now reads '[row caption] does not exist'. Also, if you entered an invalid value and clicked Cancel, you would get the Invalid Value warning twice. Now the system won't display this warning at all. (ECR 31626)
 - Fixed a problem where custom fields would not be displayed for a table if the new lookup feature was turned on. (ECR 34239)
 - Fixed a problem where an error would occur if the Change ID function was used but there was a Required Custom Field that had not yet been entered. Now the user will get a warning and they will be forced to enter the required field before the Change ID function can be used. (ECR 24288)
- **Custom Field Validated Values:** Fixed a problem where the order defined in the Custom Validated Values screen was not being returned when doing a lookup on the custom field through the system. Also fixed a problem where the lookup icon was displaying in the middle of the column instead of to the far right. (ECR 33597)
- **Custom Reports:** Fixed a problem where a stored procedure would run twice if the case of the 3 standard fields (RptStdFldCompany, RptStdFldOptions, RptStdFldPrint) was not as expected. Now the system ignores the case and the stored procedure will only be run once. (ECR 33535)
- **Data Conversion:** Fixed a problem where Ascente would hang if you tried to cancel the Data Conversion process. (ECR 33113)
- **Daylight Savings:** Fixed a problem where at each of the Daylight Savings time changes Ascente would default the login on Ascente to the login in the Ascente.ini file because it thought the .ini file had been changed. The program now skips doing this if the date on the .ini file is the same, but the time difference is exactly 1 hour. (ECR 31766)
- **Error Log:** Changed the Error Log insert to truncate string columns so adding a record will not fail.
- **File Maintenance – Simple Grid programs:**
 - Fixed a problem where the right click menu option was not working.
 - Fixed a problem where the Notes and Custom Fields buttons were not being enabled. Also fixed a problem where the Alert User option was not working for Notes Pro. (ECRs 33481, 33491)
 - Fixed a problem where an error would occur if any of the Traverse fields being referenced contained the # symbol (ie GL Account Description). (ECR 33495)
- **Jobsite Name/Address Lookup:** Fixed a problem throughout the system where if an F2 lookup was done at the Jobsite Name or Address field, but then a Jobsite was not selected from the lookup, the focus would return to a different field than you started from. Now it will return to the same place you started.
- **Locking:** Fixed a problem where the system was doing page locks on the LockTrans table, which could cause users to be unable to run updates while someone else was doing an update. (ECR 33121)
- **Lookups:** Fixed a problem where focus could get caught in an infinite loop toggling between the Lookup form and the calling form.
- **Memory Leaks:** Made a number of changes to Ascente to reduce memory leaks. As part of this the ErrorLog table was changed to have an automatic number for the ID, rather than get the number from pdsaTableIds.

Ascente 3.7 Enhancements/Fixes

- **Menu display:**
 - Fixed a problem where the System and Pricing menus would not be displayed if the SysApp.ISecurityBit value was null. The install script now checks for nulls, sets them to zeros and then changes the system to not allow nulls. (ECR 31879)
 - Fixed a problem in the Favorites Menu where the Move Up option could be disabled at the wrong time. (ECR 33864)
 - Fixed a problem in the Favorites Menu where a warning would be displayed that the Menu description is required and must be entered when trying to move a custom favorite up or down. This would also occur if you right clicked on the 'Add Line' entry on the favorites menu. (ECR 33856)
- **Notes Entry:**
 - Fixed a problem where the timestamp for a note was always showing as PM, even if the note was entered in the morning. Also changed the program to automatically resize the Date/Time and User columns to fit the data being displayed (ECR 31866)
 - Fixed a problem where an error could occur but not be displayed properly. (ECR 33533)
- **Paging:** Fixed a problem where a Technician would not be listed as available to be paged in Call Inquiry, Paging Message Entry and Paging Group Maintenance if their Pager ID field was blank (even though they were set up to page via e-mail). The system now checks to see if a Paging Service has been assigned to a tech, and if so they are included in the list (Technician Maintenance forces a pager id or e-mail based on the Paging Service selected). (ECRs 31825 & 31992)
- **Postal Code:** Fixed a problem throughout Ascente where the City and State would not be pulled into the form if you entered a full Postal Code and clicked on the lookup (did not use F2) and then select the Postal Code from the lookup form. The system will now populate these fields appropriately. (ECR 32596)
- **Report Names:** Fixed a problem in all reports where sometimes the report name would be blank and this would cause an error. The system will now always default the name to the first available report. (ECR 31296)
- **Report Ranges:**
 - Fixed a problem where the entry of an invalid value in a report range (ie, an invalid date) would cause a message '[range caption]Beginning is invalid...' and there was no space between the range caption and the word Beginning. A space has now been added. This was also a problem with the Ending range. (ECR 31627)
 - Fixed a problem where manually entering in a start/end value would cause the start value to be adjusted when the ending value is entered on the following reports (ECR 32602):
 - Cancelled Service Calls
 - Create Amortization Postings
 - Create Maintenance Service Orders
 - Filter Requirements
 - Invoice Reprint
 - Move PO's to History
 - Page Log Report
 - Page Log Purge
 - Prebill Register
 - Service Order Print
 - Service Order Report
 - Service Sales and Use Tax
 - Uncollected Work Orders
 - Zone Summary
- **Scripts:**
 - Fixed a problem with the DeleteTempTables.sql script where it would not delete tables created by users other than 'sa'.
 - Added a script to the installer that fixes Purchase Order lines that should have been flagged as complete, but were not due to a bug in an older version of Ascente.
 - Fixed a problem with the FixTraverseGLBalance.sql script where it would error if there were no journals for an open period.
 - Fixed a problem in the UpdateMobileTables.sql script where it would error updating the Pay Codes because of a missing column.

Ascente 3.7 Enhancements/Fixes

- **Spell Check:** Fixed a problem where an extra line would get added to the text if a carriage return value was already part of the text. (ECRs 30907, 31022)
- **Tab Stops:** Fixed a problem where the system would allow you to get duplicate tab stops. This could cause erratic behavior. The system will delete duplicates during installation and prevent duplicates from being created in the future. (ECR 32090)

Ascente GPS Service

- Fixed a problem where the auto arrive function for Network Fleet was not working in some situations.

Digipage

- Fixed a problem with Digipage where it would error if the e-mail address for a user in the database did not have the # value. (We recently change User Maintenance to NOT write the # into the database). (ECR 32559)
- Fixed a problem with Digipage where it would error if the sender e-mail from Paging, Maintenance, Options and Interfaces was not stored in the old #Mailto: format. The program now supports both the old and new e-mail formats. (ECR 32775)

Flat Rate, Reports, Flat Rate Price Book

- Fixed a problem where an error would occur if any report ranges were entered. (ECR 33947)

Job Cost, Inquiries, Job Actuals Inquiry

- Fixed a problem where the First/Last/Next/Previous buttons were not working. (ECR 34224)

Job Cost, Maintenance, Job

- Fixed a problem where if you accidentally set up the billing method for a Job as Quantity you couldn't change it to percent compete, even if there are no billings for the job. (ECR 31575)
- Fixed a problem where the system wouldn't allow you to close a job if the billing amount was greater than the sum of the Contract plus the Change Orders.
- Fixed a problem where the next invoice number would not get set properly if the Job # was more than 11 characters. (ECRs 33242, 33243)

Job Cost, Periodic, Job Purge

- Fixed a problem with the Job Purge Register where it would show the purge value as 'No', even though the job had been checked to be purged. This was just a reporting problem, as the job would still be purged. (ECR 32074)
- Fixed a problem where the user did not get a warning if they decided to start over. (ECR 32084)

Job Cost, Reports, Certified Payroll

- Adjusted the Certified Payroll report so it will no longer error if a customer address is more than 20 characters. (ECR 30646)
- Adjusted the Certified Payroll report to print the Voucher # as the Check # if the employee was paid via Direct Deposit. (ECR 29906)

Job Cost, Reports, Job Age Analysis

- Fixed a problem where you would get an error in the SQL command if the database compatibility level was not set to 80. (ECR 31565)

Job Cost, Reports, Job Cost Report, Estimate/Actual Worksheet

- Fixed a problem the Estimate/Actual Worksheet report was not having the MTD Costs column populated. (ECR 32498)
- Fixed a problem where the starting time for the Estimate/Actual Worksheet was being set to 23:59:59 instead of 00:00:00. This would cause the first date entered by the user to be skipped. (ECR 32763)

Ascente 3.7 Enhancements/Fixes

Job Cost, Reports, Job Reports, Job Listing

- Fixed a problem in the Job Listing report (JobListing.rpt) where Address line 1 would not print if Address line 2 was blank. (ECR 32057)

Job Cost, Transactions, Contract Billing

- Adjusted the format of the AIA 2 invoice (ContractBillAIA2.rpt) to do the following (ECR 32798):
 - Adjusted the Deductions column so Additions would not print in it
 - Widened both the Additions and Deductions columns
 - Now print the Job # on all pages
- Fixed a problem where the system would allow you to date a new invoice prior to the date of the last invoice generated for the job. This would cause problems on a number of the job cost reports. (ECR 33092)
- Fixed a problem where the next invoice number would not get set properly if the Job # was more than 11 characters. (ECRs 33242, 33243)

Job Cost, Transactions, Job Time and Material Billing

- Fixed a problem in the Job T&M Registers where a preview or print would take a very long time on some systems. This was because the reports were saved with a specific printer definition. These have now been changed to have 'No Printer'. Also had to adjust the format of the Tax and % columns. (ECR 32104)
- Fixed a problem where you would erroneously get a dialog about Tax Groups if phases are turned off. (ECR 32182)
- Fixed a problem where the lock for the JobBillingHeader was not being cleared. (ECRs 31100, 32174)

Job Cost, Transactions, Inventory to Job

- Fixed a problem where the OK button was not being disabled after the record was saved. If clicked again the user would get an error. Also fixed a problem where the system would correctly say an item didn't exist in a location, but if you said Yes to add it, the next time you tried to change the record it would again say the item didn't exist in the location, but it did. (ECR 33002)

Paging, Transactions, Message Entry

- Fixed a problem where group paging would fail if the page was an e-mail type, but the Pager ID in the Technician or Paging Persons file was blank. Added the recipient name to the warning message if a page correctly fails because it is missing a Pager ID or Email address. The program used to stop once it hit a bad page, but will not continue to try each member of the group. Previously if a page was split into multiples because it was too long, and it got an error, the user would get a message for each piece. Now the system will give the user a message just once. (ECR 32744)
- Fixed a problem where group pages would fail if any of the e-mail addresses were not stored in the old #Mailto: format. Now the system will process both the old and new formats. (ECR 32720)
- Fixed a problem where group pages would skip a paging person in some cases, if they were set to send the page via e-mail. (ECR 32810)

Quotes, Reports, Quote Reports, Quote Activity

- Fixed a problem where the Quote Activity reports (both All and Open) would error if any of the e-mail addresses were no longer stored in the old #Mailto: format. Now the system will handle both the old and new e-mail formats. (ECR 32772)

Quotes, Reports, Quote Reports, Quote Breakdown Report

- Fixed a problem in the Quote Breakdown Report would report an incorrect Quote Price if doing Margin pricing. (ECR 33526)

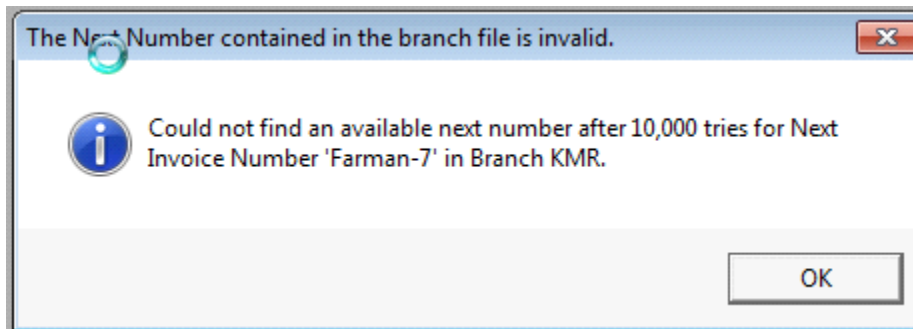
Quotes, Reports, Quote Reports, Quote Proposal Form

- Fixed a problem in the Quote Proposal Form where the quote price could be off by a few cents from what was in the entry screen.

Ascente 3.7 Enhancements/Fixes

Quotes, Transactions, Quotes

- Fixed a problem where a lookup on the Quote field was ignoring the Lookup Limit set in the System Options & Interfaces (ECRs 32160, 32337)
- Fixed a problem where you would get a hard error when doing the following:
 - Set up a required Custom Field for Quotes
 - Set the next Quote in Branch to be ABC-1
 - Add Quotes letting the system assign the next Quote Number
 - On the 9th add, instead of clicking on the save button, press the Custom Fields button. This will cause the hard error.Now the system will display the error message below. (ECR 31937)



- Fixed a problem where after entering a component and then saving the Quote, the component field would go blank. However, the system was actually saving the information and if you viewed the Quote again the component would display. (ECR 32932)
- Change the program to warn the user that the Branch, Department, Bill Type combination will generate invalid GL Accounts and will prevent the user from saving the line item. (ECR 33198)

Service Dispatch, Inquiries, Service Order History

- Fixed a problem where the Jobsite e-mail address might display in an improper format. (ECR 33093)
- Fixed a problem where an error would occur if a Jobsite was selected that had multiple history records, a record is selected, and then the lookup button is clicked on. (ECR 33098)
- Fixed a problem where errors could occur when adding multiple records to the Tech Log tab.
- Fixed a problem where an error could occur when using the Copy To function to create a Credit Memo from Service History if one of the fields had a Search Key that started with a number (ie, Department). (ECR 34123)

Service Dispatch, Inquiries, Work Order History

- Fixed a problem where even if the Hide Pay Rates security was set for a user, they could still see the pay rate on the line items in Work Order History. (ECR 31956)

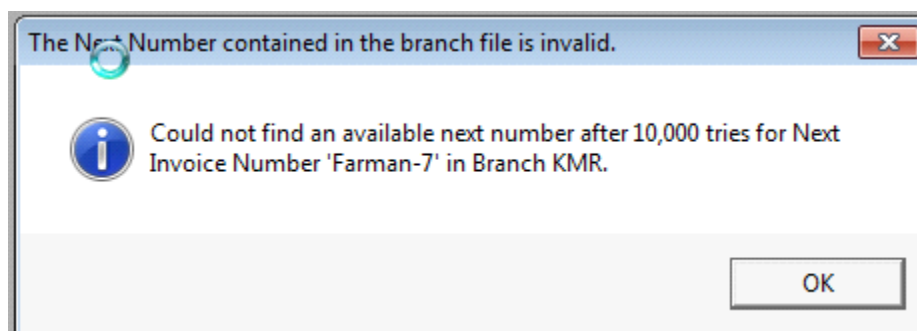
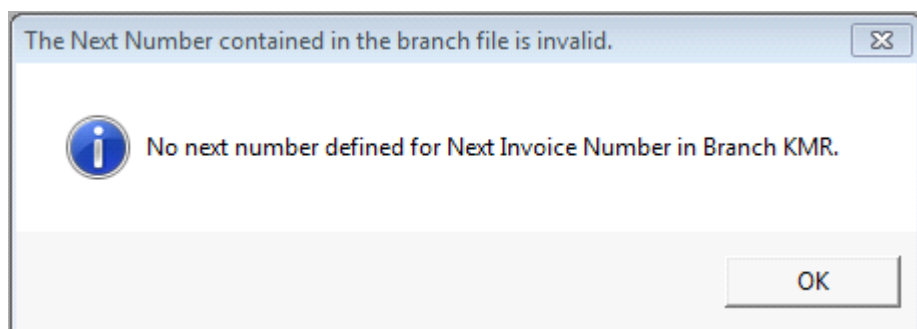
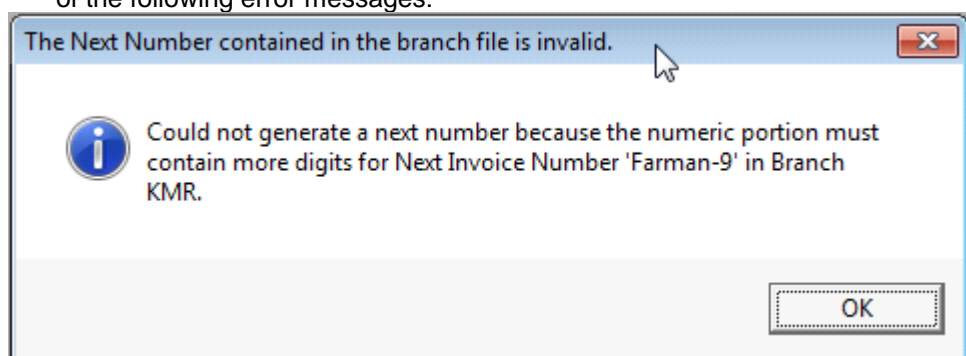
Service Dispatch/Job Cost, Journals, A/P Register

- Fixed a problem where Inventory quantities would not get adjusted correctly when updating a Debit Memo for a PO Return (ECR 34006)
- Fixed a problem where the update could get an error when trying to update inventory quantities for a Debit Memo for a PO Return if the quantity transactions didn't exist in Traverse for some reason. (ECR 34103)

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Journals, Prebill Register

- Fixed a problem with the Prebill Payments register (PrebillPayments.rpt) where it would always print in duplex on some systems (ECR 32312)
- Fixed a problem with the Prebill Register (Prebill.rpt) where it would always print in duplex on some systems (ECR 32305)
- Fixed a problem where the word 'Rendered' was misspelled in the body of e-mail invoice being sent to the customer. (ECR 32799)
- Fixed a problem where the Exceptions versions of the reports could generate an error if the exception message was more than 255 characters. (ECR 33334)
- Changed the program to allow the billing of Service Orders that have unposted Mobile transactions, but only if the Service Order is a Progress Bill type. (Requires Mobile Pro 2.0.3.8 or greater)
- Fixed a problem where the information on the right hand side of the report could be cut off when printed.
- Fixed a problem where the Prebill Register would hang if an Invoice Number assigned. The user will now get one of the following error messages:



Service Dispatch, Journals, Timecard Register

- Fixed a problem with the Timecard update for Service Order transactions where if the Item/Location on the WO doesn't exist the program prompted if you want to add it. You could answer No or Cancel which didn't add it to the Work Order. Now the system will automatically add the item to the location without prompting the user. (ECR 32603)
- Changed the report to have 'No Printer' set in order to resolve formatting problems on some printers.

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Journals, Service Order Workflow Register

- Fixed a problem where the cancel button was not clearing the runtime ranges. (ECR 32841)
- Fixed a problem where the wrong Crystal Report name was being selected.

Service Dispatch, Maintenance, Bill Type Cross Reference

- Fixed a problem that would occur as follows (1) Select the first row and change the Bill Type to be the one with the highest ID in SQL. (2) Select the Save button and the transaction would get resorted to the end of the grid. Now it where stay where it was. (ECR 32968)

Service Dispatch/Job Cost, Maintenance, Branch

- Fixed a problem where the Service Burden field was not displayed if Job Cost was not registered. The program will now only hide the Default Job Burden and Next Job Number if Job Cost is not registered. (ECRs 29561, 31797, 32053)
- Fixed a problem where you would get an error added a new Branch record saying the Next Job # needed to be assigned, even though Job Cost is not registered. (ECR 33046)
- Fixed a problem where an error would occur if a Next Job # was entered that was more than 10 characters. The program now limits the entry to 10 characters. (ECR 33426)

Service Dispatch, Maintenance, Item Grouping

- Fixed a problem where an error 91 would occur if you select a Main or Sub group item and then right click on a gray area in the item grid. (ECR 33613)

Service Dispatch/Job Cost, Maintenance, Jobsite

- Fixed a problem where on the Tasking tab if the arrow functions were used to move the task service months to the left or right an error saying 'Task ID' is required and must be entered' would occur once the record was saved. (ECR 32792)
- Fixed a problem where the X-Charge Credit Card link information was being saved with the wrong Entity ID if the user initiated the entry from one of the sub tabs on the form. The system has been changed to only enable the Credit Card button if the user is on the General or Defaults tab for the Jobsite (not contract). Upon installation the system will repair any existing records. (ECR 32795)
- Fixed a problem where you would get an error if you tried to enter a name that was longer than 30 characters and try to save the record. The program will now limit your entry to 30 characters. (ECR 33069)
- Fixed a problem where you would get an error if you create a new jobsite record, save, then make an additional change and try to save again. (ECR 33090)

Service Dispatch/Job Cost, Maintenance, Postal Code

- Fixed a problem where the system was not forcing a valid Zone or Branch value. New triggers have been added that will cause the entry to fail if they are invalid. (ECRs 32088 & 32089)

Service Dispatch, Maintenance, Service Order Type

- Fixed a problem where setting an existing record to a new department, where the department ID was >=1000 the system would display the ID instead of the Department Code. Also when saying yes to save changes the system was not. (ECR 32969)

Service Dispatch/Job Cost, Maintenance, Technician

- Fixed a problem where you could not add a new technician if a Mobile Vendor Class was entered. This was causing an error. (ECR 32038)
- Fixed a problem where errors could occur when adding multiple records to the Tech Log tab.

Service Dispatch, Maintenance, Unit of Measure

- Fixed a problem where this option would crash Ascente if run from the Service Dispatch menu, but worked ok from the Job Cost menu. (ECR 32889)

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Periodic, Create Maintenance Service Orders

- Fixed a problem in Create Maintenance SO's where if a contract is set up such that multiple SO's need to be created for the same contract record, the expiration date is being ignore and instead the contracts were created up through the cutoff date. (ECR 32430)
- Fixed a problem in Create Maintenance SO's where if a jobsite has multiple billing records to be generated, only the first one will have the hour set to 1. Now all will have it set to 1. (ECR 32542).
- Fixed a problem where automatic credit card payments were not updating the Service Order record with the payment amount. (ECR 32804)
- Fixed a problem where the Service Order Payment record was being updated with the wrong payment method when automatic credit card payments were processed. (ECR 32805)
- Changed the register to no longer report that there are Expired Credit Cards if a credit card link for a Jobsite could not be found. (ECR 32792)
- Changed to always update the next creation date and not just end if multiple SO's are created for the same Jobsite Contract detail line. This way if an error occurs, SO's won't be created twice. Also fixed a problem with the retry logic if there is a concurrency error when getting the next SO Number. This also affects getting the next numbers from Branch, including Job numbers, Invoice Number (for Prebill), Schedule update and Work Order Line update for recalculating Tax for the SO and Job Billing Headers. (ECR 32859)
- Fixed a problem where a contract could incorrectly be skipped or selected if there was only a service record (no billing). (ECR 33376)
- Fixed a problem where the register could incorrectly report a Credit Card payment for a contract. (ECR 34242)

Service Dispatch/Job Cost, Periodic, Move PO's to History

- Fixed a problem in Move PO's to History where a Purchase Order would not get moved to history because the program was not comparing the ordered and invoiced amounts correctly in some situations. (ECR 32442)
- Fixed a problem in Move PO's to History where a Purchase Order would not get moved to history if there was only one line item on the Purchase Order. (ECR 32441)

Service Dispatch, Periodic, Work Order Restock Register

- Fixed a problem where the locks were not being released immediately after the update completed. The form had to be closed to release the locks. (ECR 32833)

Service Dispatch/Job Cost, Reports, Accounting, General Ledger Audit Report – by PostRun

- Fixed a problem where this report would incorrectly report that the grand total of debits/credits were out of balance. (ECR 32882)

Service Dispatch, Reports, Filter Requirements

- When printing Filter Requirements by Jobsite the report will now skip contracts that have expired. (ECR 31376)
- Fixed a problem where Filters could be listed extra times if more than one Service record was set up for a contract. (ECR 32431)

Service Dispatch, Reports, GL Journal, GL Journal - Summary

- Adjusted the GLJournalSummary.rpt to have the "No Printer" value set in order to resolve printing problems on some systems.
- Fixed a problem where the user could still run this option from a posting program (ie. Timecard), even if their menu security was set to not allow them to run this program. In addition, the program was changed to not allow the user to select a Payroll journal from this report if their User Security was set to Hide Pay Rates. (ECR 33324)

Service Dispatch, Reports, Jobsite Performance

- Fixed a problem where the report would not select the correct data if the workstation was set to return dates in dd/mm/yyyy format instead of the US format of mm/dd/yyyy. (ECR 34193)

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Reports, Maintenance Contracts

- Removed the linking of the Jobsite to the Local Identifier in the range selection for all of the Maintenance Contracts reports. This way you can enter independent ranges for both the Jobsite and Local Identifier. (ECR 32416)

Service Dispatch, Reports, Manpower Requirements, Open Maint SO by Tech

- Changed the name of this report to be Maintenance SO's by Tech since this selects all service orders that haven't been billed, not just Open service orders. (ECR 31333)

Service Dispatch/Job Cost, Reports, Marketing, Customer Email Addresses

- Fixed a problem where the report would error if there were any e-mail addresses not stored in the old #Mailto: format. The CustomerView was recreated to handle both the old and new e-mail formats. (ECR 32801)

Service Dispatch/Job Cost, Reports, Payroll Reports, Timecard History

- Fixed a problem where the Job# and Internal Pay Description could print on top of each other if the labor came from Mobile Pro. The report now will always print the Internal Pay Description if it has a value. If it doesn't have a value, the Job # will be printed.

Service Dispatch, Reports, Sales Analysis, Service Sales by Bill Type

- Fixed a problem where credits were not being reported as negatives. (ECR 33472)

Service Dispatch, Reports, Service Order Print, Tasking Service Order

- Fixed a problem where the contract name was not being passed to the report, and therefore not printing. (ECR 32005)

Service Dispatch/Job Cost, Reports, Technician Reports, Technician Billable Service Hours

- Fixed a problem with the WorkOrderLineHistLaborView and rptWorkOrderLineHistByBillTypeView where they could return extra records if a Bill Type was referenced multiple times in the Bill Type Cross Reference. (ECR 31751)

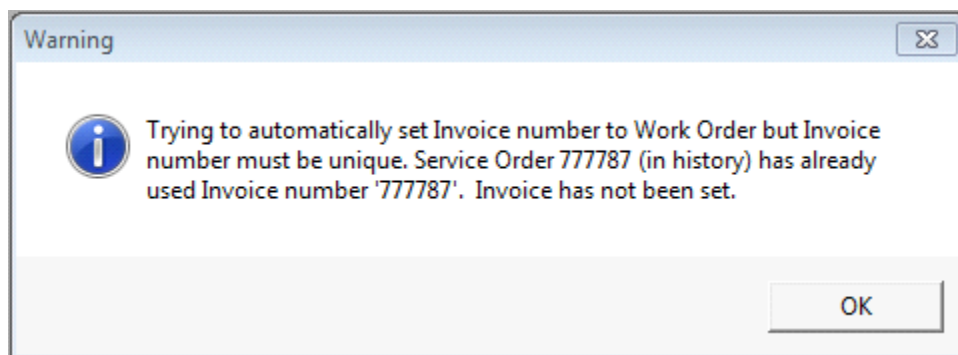
Service Dispatch, Transactions, Call Taking

- Fixed a problem where a Jobsite lookup would get an overflow error if the jobsite address had two separate numbers (1139 E 900 N) unless there was a period between the numbers (1139 E. 900 N). (ECR 33067)
- Fixed a problem where the system could assign a duplicate AR Transaction ID to the Service Order, which would then result in an error during the Prebill update. Now the system checks both existing Service Orders and A/R Transactions to insure a duplicate is not being created. (ECR 32931)

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Transactions, Call Inquiry and Dispatch

- Fixed an issue where double clicking on a call in the Call Inquiry screen the system would leave focus in the grid. The system now puts focus on the first control after the Service Order field that has the tab stop turned on. (ECR 31840)
- Fixed a problem on the Dispatch Board where left clicking on a call would immediately lock it. This was done in preparation for the call to be dragged/dropped. Now the system will lock right before saving the record, which means that if the Service Order can't be locked the warning message will occur after the call has been dropped. (ECR 31849)
- Fixed a problem on the Schedule Board where the Reset Setting button would do nothing. (ECR 31900)
- Changed the Copy function to reset the Call Taken By, Input Date/Time, Promise Date, Promise Date Option, Promise Time Beginning/End, Technician, Invoice Number, Schedule and Status to default just as if a new call were being taken. (ECRs 31276, 31799, 32017)
- Fixed a problem where an error would occur when the system was trying to set the Invoice Number equal to the Work Order Number, if the Invoice Number already exists. The system will now give the following warning instead:



- Fixed a problem where the system was not warning the user if the Work Order entered had already been used in history. The system now gives the same warning as in Work Order Entry. Also the dialog box now has the Cancel button as the default instead of OK. (ECR 32107)
- Fixed a problem where you would get an error instead of a warning if a page record was not added. (ECR 32643)
- Changed the system back to displaying the Jobsite Name in the Call Inquiry grid and pop-up screen, instead of the Jobsite Search Key. (ECR 32736)
- Fixed a problem where if Call Taking was selected from Call Inquiry and then Call Taking was minimized, if you did another right click in Call Inquiry and selected Call Taking, the original minimized form was not displayed. The system gave you a warning message that you had to finish work on the original call. Now the system will display the minimized form.
- Fixed a problem on the Schedule board where clicking on a call that was not scheduled for an exact 15 minute increment (00, 15, 30 or 45) the system would shift it to the nearest exact 15 minute increment and would add a new Tech Log record. Now if you click on a call none of these events will occur. (ECR 32958)
- Fixed a problem where an error would occur when trying to change the status of a Service Order if the Work Order in the Tech Log record no longer exists. (ECR 32938)
- Fixed a problem where an error would occur if the Promise Date was blank or had a partial entry at the time an Auto Refresh ran. The system will now skip doing an Auto Refresh if there is an invalid or missing date.
- Fixed a problem where the fixed price amount would be changed to zero if a call was dragged to a different tech. (ECR 33517)
- Fixed a problem where focus would incorrectly shift back to the Call Inquiry Schedule Board from the Tech Inquiry when doing a right click function on the Tech Inquiry. (ECR 33425)
- Fixed a problem where the program would incorrectly display the message "To check Customer credit limits you must set the Customer and AR Open Invoice class" when selecting a call from the Tech Inquiry if you originally came from the Schedule Board Summary view.
- Fixed a problem where you could right click on a call and go to Call Taking, close out and select another call, but the call displayed in Call Taking would be the wrong one. (ECR 33661)
- Fixed a problem where you would get a warning if you try to set up a tab stop on the Status field. (ECR 33865)

Ascente 3.7 Enhancements/Fixes

- Fixed a problem where a warning about Customer Credit Limits would appear if you double click on a Tech Schedule record (vacation, sick, etc). (ECR 33870)
- Fixed a problem on the Schedule Board where if a tech had multiple calls, and you moved around at least 3 calls as quickly as possible, and then pressed the F5 (Refresh) key, most of the calls would return to their original positions. (ECR 34014)
- Fixed a problem on the Schedule Board where if a call was dragged in a way that it spanned across 2 days the estimated hours would get set to negative, which would cause the call to be displayed in an odd way. (ECR 34030)

Service Dispatch, Transactions, Call Taking

- Fixed a problem where the system would not allow you to use the same Credit Memo # as the original Invoice #. The system now allows the same number so they will offset each other in Traverse once posted. (ECR 31513)
- Fixed a problem where you could get an error saying 'Promise Time Required' if you manually adjusted the Promise time on the Scheduling Tab. (ECR 32394)
- Fixed a problem where in some situations when selecting the (Cash) customer, when previously a different customer had been entered, the system would briefly display the (Cash) customer but then reset to the original customer id. (ECR 32681)

Service Dispatch, Transactions, Purchase Order

- Fixed a problem in Purchase Order where the custom fields button would not be displayed. As part of this 5 new triggers were added to the system to delete Custom Fields and Notes if the corresponding Traverse record is deleted (Customer, Purchase Order, Vendor). (ECR 32314). The new Triggers are:
 - trgTblArCust_CustomFields – delete Customer Custom Fields when Customer deleted from Traverse
 - trgTblArCust_pdsaNotes – delete Customer Notes when Customer deleted from Traverse
 - trgTblApVendor_Customfields – delete Vendor Custom Fields when Vendor deleted from Traverse
 - trgTblApVendor_pdsaNotes – delete Vendor Notes when Vendor deleted from Traverse
 - trbTblPoTransHeader_CustomFields – delete Purchase Order Custom Fields when Purchase Order deleted from Traverse.

Service Dispatch/Job Cost, Transactions, Timecard

- Fixed a problem in Timecard Entry where the system was always rounding the Hours entered to 2 decimals, even if the system was set to store more than 2 decimals. (ECR 32466)
- Fixed a problem where the headings for the Employee Lookup would show Employee<Name instead of Employee and Name in separate columns. (ECR 32469)
- Fixed a problem where the local tax code now defaults to the local tax code set up in the Traverse Employee file, rather than the first local tax code tied to the default state. (ECR 32826)
- Fixed a problem where Ascente would crash if the transaction being displayed came from Mobile Pro and the ISOLine_id was greater than 25565. (ECR 33714)

Ascente 3.7 Enhancements/Fixes

Service Dispatch, Transactions, Work Orders

- Fixed a problem where errors would occur if you re-use an Invoice number. This would also cause the Service Order to remain locked when it shouldn't be. (ECR 32099)
- Fixed a problem where the system would not allow you to use the same Credit Memo # as the original Invoice #. The system now allows the same number so they will offset each other in Traverse once posted. (ECR 31513)
- Fixed a problem where changing the quantity on a credit memo line that is related to a Quick PO would cause the PO type to change from New Return to New Order. (ECR 31877)
- Fixed a problem where the system would allow you to enter a Quick PO against an existing Return Type PO, but the Work Order is for an Invoice. It also allowed you to do a Quick PO against a Purchase PO on a Credit Memo Work Order. These are no longer allowed. (ECR 31833)
- Fixed a problem where the Move To Line function was not working properly. (ECR 32378)
- Changed the program to no longer change the Inventory account on an existing line if the Bill Type is changed. The exception to this is if the new Bill Type has the Ignore COGS flag set, it will set the Inventory account to match the COGS account. (ECR 32865)
- Fixed a problem where the program would get in an endless loop if an invalid Auto Add item existed. Now the program will give a message that the item is invalid and not save the line. (ECR 33424)

System, Maintenance, Custom Field Definition

- Fixed a problem where you would get a hard error trying to set up custom fields for Service Order or Work Order. (ECR 32504)
- Fixed a problem where some invalid tables were listed in the list of available tables to assign a custom field. (ECRs 32313, 32438)

System, Maintenance, Form Printers

- Fixed a problem where the Active check box was being ignored. (ECRs 26408, 28646, 33306)

System, Maintenance, User

- Fixed a problem where the save button would not be enabled if menu option changes were made on the Security tab. (ECR 32188)
- Fixed a problem where the system would not let you delete a user if they had Favorites, Tab Stop or User Settings records. The system now does a cascade delete of these (ECR 32398, 32513)
- Fixed a problem where the Copy From button was not properly copying over the toolbar security records and was instead creating duplicates. (ECRs 27738, 32661)
- Fixed a problem where the Copy to Group button was not properly updating the user security records and instead was creating duplicates. (ECR 32659)
- Fixed a problem where the middle select all button on the Security/Options tab would do nothing if for a menu other than Service Dispatch. (ECR 33053)
- Fixed a problem where the user could type while the system was doing the Copy from Existing function when creating a new login. Now the user cannot do entry while there is an hourglass. (ECR 33037)
- Fixed a problem where the toolbar security changes were not being saved. (ECR 33397)

Teletrac Interface (VBTele.exe)

- Fixed a problem where the Schedule record for a Service Order would be set to Arrived when the vehicle broke the electronic fence, but the date/time stamp was not set (remained at dispatch date/time). The system now updates the Arrive date/time. (ECRs 28095, 32141)
- Changed to write to the ErrorLog using the new auto-increment ErrorLog ID. (ECR 32729)
- Fixed a problem where the Auto-Arrive update of the Schedule was generating an error.
- NOTE: This program is now replaced by the Ascente GPS Service and should no longer be used.