

Ascente 4.0 Enhancements/Fixes

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SPECIAL NOTES:

Ascente 4.0.x requires a server running Windows 2003 or greater. Windows 2000 is no longer supported.

Ascente 4.0.x requires SQL 2008 or SQL 2008 R2.

Ascente 4.0.x requires that Traverse 11 be installed first, which requires Traverse to be at the 10.5 SP3 level prior to upgrade.

Ascente 4.0.x requires that Ascente 3.7.9 be installed first.

Due to the way Traverse stores the Item Pictures, these cannot be converted to the Ascente inventory. After updating to the new version, the pictures will need to be set up in Ascente.

Due to the redesign of the Traverse Digital Dashboard, the Ascente and any custom Dashboard views are not available in Traverse 11 at this time.

All custom Reports, Triggers, Stored Procedures and Info Alerts will need to be reviewed and may need to be rewritten or adjusted to work with the new Ascente & Traverse. Block time will need to be purchased for this project.

Open Systems, the makers of Traverse, have dropped support for the Traverse 10.5 Payroll system; therefore, upgrade priority will be given to those customers who use the Traverse Payroll system to print payroll checks.

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Many new menu items have been added to the system. Users flagged as Administrators will have access to these, but all other users will not. If you want a user to be able to run a new item, you will need to go into System Manager, Maintenance, User, view the user, go to the Security tab and check off those items you would like them to access. Here is a list of the new menu selections:

<u>Menu</u>	<u>Sub-menu</u>	<u>Item</u>
Inventory	Transactions	Inventory Transaction
		Inventory to Job
	Journals	Inventory to Job
		Price and Cost Update
	Periodic	Options & Interfaces (Inventory)
		Forecast Type
		GL Account Code
		Location
		Part
		Part Alias
		Part Bill of Material
		Part Grouping
		Part Location
		Part Picture
		Price Break
		Price Level
		Price Override
		Product Line
		Unit of Measure
		Inventory Reports
	Reports	
Mobile	Maintenance	Options & Interfaces (Mobile Server)
		Options & Interfaces (Mobile Client)
		Pay Code Price Level
		Resolution
		Resolution Grouping

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<u>Menu</u>	<u>Sub-menu</u>	<u>Item</u>
Payroll	Transactions	Timecard
		Timecard Register
	Journals	Void Check Timecard Register
		Techlog Timecard Update
	Maintenance	Allocation Method
		Employee
		Employee Earnings Markup
		Labor Grade
		Pay Code
		Pay Code Price Level
		Payroll Distribution
		Prevailing Wage
		Technician
		Union
		Union Calculation
		Worker Compensation
	Reports	Payroll Reports
		Payroll Trends
		Union Report
		Certified Payroll
		Technician Commission
Purchase Order	Transactions	Purchase Order
		A/P Invoice
	Journals	A/P Register
		Move PO's to History
	Periodic	Branch
		Unit of Measure
		A/P Vendor Inquiry
	Maintenance	Purchase Order Print
		Purchasing Reports
	Inquiries	
Service Dispatch	Journals	Techlog Timecard Update
System	Maintenance	Cell Carrier
		Email Account
Web Portal	Maintenance	Web Portal User

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Enhancements

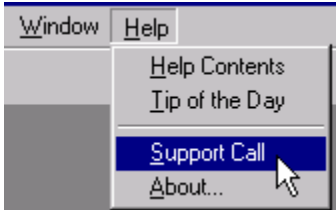
General

- On-line Help (F1) has been updated to include all of the features described in this document.
- CreateViews.sql script has been adjusted for the following:
 - Adjusted to recreate the standard views using the new data structures and to also create the new views needed for standard file maintenance listing reports.
 - Adjusted the CreateViews.sql script to create a new AscenteUpdate_sp stored procedure that replaces the Ascente/Setup/Custom.sql script. The AscenteRev4.x.sql script now calls this stored procedure as the last part of the installation. Any custom updates that need to be done need to be added to this new stored procedure.
 - Adjusted all views to use NOLOCK to prevent deadlocking.
 - Added the following new views:
 - GL_JournalDetail_View
 - GL_JournalSummary_View
- Favorites – Custom Favorites items can now be set up to have parameters passed.
- User Account Control (UAC) - No longer requires User Account Control (UAC) to be set to the lowest level.
- Part Lookups throughout the system now search on Part Number, Part Description and Product Line.

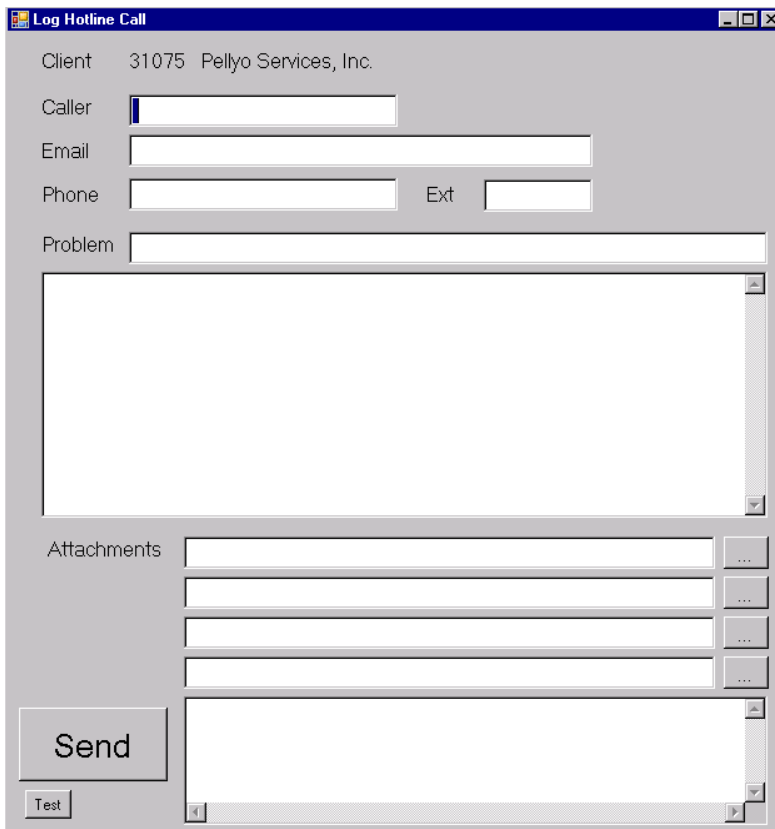
Ascente 4.0 Enhancements/Fixes

Add a Hotline call directly from Ascente – New Feature

The Help, option from the Toolbar has a new option call Support Call that will allow you to directly log a Hotline call regarding any topic (Ascente, Traverse or other).



After selecting the Support Call option the following screen will be displayed, but with your Client # and name.

A screenshot of the 'Log Hotline Call' dialog box. The window title is 'Log Hotline Call'. It contains the following fields: 'Client' (pre-filled with '31075 Pellyo Services, Inc.'), 'Caller' (empty text box), 'Email' (empty text box), 'Phone' (empty text box) and 'Ext' (empty text box). Below these is a large 'Problem' text area. At the bottom, there are four 'Attachments' text boxes, each with a browse button ('...'). A 'Send' button is located at the bottom left, and a 'Test' button is at the bottom left of the main text area.

Fill in the form and click the Send button to create a Hotline call regarding any topic. Your call will be placed directly into the Hotline queue. This does require an active internet connection.

NOTE: This option should NOT be used for emergency items, such as not being able to process payroll. In this type of situation a call should be placed directly to Hotline to insure proper processing.

AscenteSetup Installation Program

The installer will only run if Ascente 3.7.9 and Traverse 11 are currently installed. If running on a prior version of Ascente you will first have to upgrade to Ascente 3.7.9.

Ascente 4.0 Enhancements/Fixes

Flat Rate – Kimmons import

The Flat Rate module was updated to support the new Kimmons file format. In addition, the Preliminary Flat Rate Import Bill of Materials was changed to allow the entry of a starting position for use with non-standard file formats.

Flat Rate, Periodic, Flat Rate Task Update

The update now checks the new Material Margin Percent in the Inventory Options. If this is set to zero, the system will use the regular material sell price when calculating the Flat Rate price. If the Material Margin Percent is not zero, the system will use the marked up material value based on the Margin.

Inventory Module – New Feature

A new Inventory module has been added to Ascente. Upon installation your existing Traverse Inventory will be imported into this new module. Some key features that this affords are:

- Items are now referred to as Parts throughout the system
- Can change Part ID's
- Can change Location ID's
- Location ID's can be up to 20 characters (was 10 in Traverse)
- Product Line ID's can be up to 50 characters (was 12 in Traverse)
- Price/Cost information for Parts are stored at the Part level instead of the Part Location level, which greatly simplifies price/cost updates.
- The Pricing menu has been merged into the new Inventory Menu, since pricing is a function of Inventory.
- The Pricing scheme has been adjusted to match how Mobile Pro works and eliminates the Customer Level/Promotional Pricing options.
- Can define a separate costing method for Bill of Material Tasks
- Can flag Parts to automatically create a Jobsite Component when the part is billed on a Work Order.
- Tax and GL accounts are now defined at the Product Line level instead of the Part level

The menu options available are;

Transactions	Inventory Transaction (Transfers, Adjustments, etc) Inventory to Job
Journals	Inventory to Job
Periodic	Price and Cost Update
Maintenance	Options & Interfaces (Inventory) Forecast Type GL Account Code Location Part Part Alias Part Bill of Material Part Grouping Part Location Part Picture Price Break Price Level Price Override Product Line Unit of Measure
Reports	Inventory Reports (Inventory Transactions, Costed Inventory Report)

Ascente 4.0 Enhancements/Fixes

In addition, some significant features have been added to the Part Bill of Materials option:

- A picture for the task can be added/displayed here
- Price 1, Price 2, Average Cost and Last Cost are now displayed in the detail grid for the component parts
- A material margin can be defined for the task (with the default set up in the Options & Interfaces (Inventory) screen).
- Options & Interfaces (Inventory) allows you to define which Price (1-4) is updated when you use the Update feature to update prices. This also applies to the new Current Price field, which displays the current price from Inventory. You can manually adjust the price in this screen and it will update the price in inventory.
- A grid displays with the totals of the Labor, Material, Other and Total costs and sell prices. The sell price for Material is based on the Material Margin % noted previously.


Part Bill of Material Maintenance

Part: T1000 Status: Active Picture: Water Heater

Description: Install 40 Gal Gas Water Heater

Additional Description: Install a 40 Gallon gas Water Heater. Includes Earthquake strap, pressure relief valve and permits.

Material Margin %: 0.00 Current Price: 950.00



	Labor	Material	Other	Total
Cost	0.00	560.00	0.00	560.00
Price	225.00	560.00	0.00	785.00

General

Component Part	Description	Part Status	Skip	Zero Price	Quantity	Price 1	Price 2	Average Cost	Last Cost
WH40Smith	Water Heater 40 Gal Smith	Active	<input type="checkbox"/>	<input type="checkbox"/>	1.00	800.000	900.000	400.0000	400.0000
Pressure Relief Valve	Pressure Relief Valve	Active	<input type="checkbox"/>	<input type="checkbox"/>	1.00	40.000	35.000	19.0384	20.0000
Copper Elbow	Copper Elbow	Discontinued	<input type="checkbox"/>	<input type="checkbox"/>	4.00	50.000	45.000	12.6711	25.0000
L	Labor	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2.50	90.000	85.000	30.0000	30.0000
FX100	Moen Lav Faucet...x	Active	<input type="checkbox"/>	<input type="checkbox"/>	1.00	70.000	75.000	35.0000	35.0000

Created: 9/8/2014 10:53:08 AM Changed: sa 9/8/2014 10:53:08 AM 1/13/2015 3:15 PM

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Invoicing (Service) changes

The configuration for the e-mailing of Invoices has changed from the prior versions. Ascente determines if a Service Invoice should be e-mailed instead of printed by checking the Invoice Print value on the Service Order.

- Invoice Print value selected on the Billing Tab of the Call Taking screen must be set to Email for the Print Invoices option

The screenshot shows the 'Call Taking' application window. The 'Service Order' tab is active, displaying various fields like 'User Defined', 'Invoice', and 'Summary'. The 'Invoice Print' dropdown is set to 'Email Standard' and is highlighted with a red box. A red arrow points from this box to the 'Print Invoices' dropdown in the 'Invoice Print Maintenance' dialog, which is also set to 'Email' and highlighted with a red box. The 'Invoice Print Maintenance' dialog has tabs for 'General', 'Attachments', and 'Message'. The 'General' tab is active, showing options like 'Mobile Invoice Format', 'Print Invoices', and 'Attachments'. The 'Print Invoices' dropdown is set to 'Email' and is highlighted with a red box. The 'Attachments' dropdown is set to '(None)'. There are checkboxes for 'Print Work Order Information', 'Print Work Order Description', 'Print Items on Summary', 'Print Labor Hours on Summary', and 'Print Open Invoices Only'. The 'Message' tab is also visible, showing a text area for a message and a dropdown for 'Email Subject'.

This value defaults from the Jobsite when the Service Order is created in the Call Taking screen, but can be overridden on a call basis.

The system then determines if the invoice should be emailed to the Customer or to the Jobsite by checking the flag in the Options & Interfaces (Service), Invoice tab:

The screenshot shows the 'Service Dispatch Options and Interfaces Maintenance' dialog, specifically the 'Invoice' tab. The 'Email Invoice To' dropdown is set to 'Customer' and is highlighted with a red box. The dialog has tabs for 'Service Defaults', 'Service Options', 'Dispatch', 'Scheduling', 'Maintenance Defaults', 'Work Order', 'Invoice', 'Payroll', and 'User Defined Fields'. The 'Options' section has a checkbox for 'Update by User Only'. The 'Summary Descriptions' section has fields for 'Description', 'Material', 'Labor', 'Fixed Price', and 'Not to exceed'. The 'Credit Card Interface' section has fields for 'Payment Method', 'Terms Code', and 'Path for Temporary Files'.

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If set to Jobsite, the Jobsite e-mail address (must have a value) on the General Tab of the Call Taking screen is used. Note that multiple email address can be used if separated by a semi-colon.

The screenshot shows the 'Call Taking' window with the 'Jobsite' tab active. The 'Email' field under the 'Jobsite' section is highlighted with a red box, containing the value 'mrice@compusource.com'. Other fields include 'Service Order' (81747), 'Date' (6/25/2014), and 'Time' (03:06 PM).

This value defaults from the Jobsite when the Service Order is created, but can be overridden on a call basis.

If set to Customer (Default upon installation), the system checks the document delivery option in the Traverse A/R Customer setup screen to see if an entry has been made for the Serv Inv Document Type. Note that multiple addresses can be set up if separated by semi-colons.

The screenshot shows the 'Traverse' window with the 'AR Customers' tab active. The 'Contact Link' button is highlighted with a red box. The 'Customer ID' is 'Jerick'.

Document Type	Delivery Method	Display Name	Deliver To	Subject	Attachment Format
SERV INV	E-mail	Jerick Enterprises	mrice@compusource.com	Invoice	PDF

To enable e-mailing you will first need to configure the Email Account to be used for sending the invoices. This is done by going to the new System, Maintenance, Email Account option. The on-line help (F1) has details as to how to set up each of these fields.

Email Account Maintenance												
General	Email Account Source	Email From	Email BCC	Email Auth Login	Email Auth Password	Email Host	Host Port	Enable SSL	Use Default Credentials	Email Priority	Delivery Notification	SMTP Delivery Method
	Compusource	Dispatcher@replyaddress.com				999.999.999.999	25	<input type="checkbox"/>	<input type="checkbox"/>	Normal	0	Network
	Mobile	compusource.com@gmail.com		compusource.com	I'm an infidel	smtp.gmail.com	587	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal		Network
	Paging	orspage@ontariorefrigeration.com				10.0.0.53	25	<input type="checkbox"/>	<input type="checkbox"/>	Normal		Network
	Service Billing	invoices@ontref.com				10.0.0.53	25	<input type="checkbox"/>	<input type="checkbox"/>	Normal		Network

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Also in System, Maintenance, Company you will need to be sure to set up the Path for PDF Reports and Store By options. This is where physical PDF copies of the invoices will be stored.

The screenshot shows the 'Company' configuration window. The 'Company' field is 'PSI' and the name is 'Pellyo Services Inc'. The 'Database' is 'AscentePSI'. The 'General Ledger' section has 'Use Traverse GL Method' unchecked, 'Branch GL Segment' set to 2, and 'Department GL Segment' set to 3. The 'Paths' section is highlighted with a red box, showing 'Path for Modified Reports' as 'c:\Program Files\Ascente\ReportsModified', 'Path for Temporary Reports' as 'c:\Program Files\Ascente\ReportsTemporary', and 'Path for PDF Reports' as '\\Server1\Public\Ascente emailed forms\emailed forms'. The 'Store by' dropdown is set to 'Year'. The 'Email' section shows 'BCC Email' as 'john@acepelizon.com'. The status bar at the bottom indicates 'Changed: sa 5/31/2012 4:41:23 PM' and '6/27/2014 2:47 PM'.

You will also need to set up at least one Invoice Print option that is set to e-mail invoices. This is done by going to Service Dispatch, Maintenance, Invoice Print. Here is an example:

The screenshot shows the 'Invoice Print' configuration window. The 'Email Detail' tab is selected. The 'General' section has 'Mobile Invoice Format' set to '(None)', 'Print Invoices' set to 'Email', and 'Attachments' set to '(None)'. There are several checked options: 'Print Work Order Information', 'Print Work Order Description', 'Print Items on Summary', 'Print Labor Hours on Summary', and 'Print Open Invoices Only'. The 'Message' field is empty. The 'Email Subject' field contains 'Ace Pelizon Invoice <DOC> dated <DATE> for <CUST>'. The 'Email Message' field contains 'Please see the attached Ace Pelizon Plumbing invoice. Thank you for allowing us to service your needs, we appreciate your'. The status bar at the bottom indicates 'Created: 5/28/2014 1:26:33 PM', 'Changed: sa 5/28/2014', and '6/27/2014 2:30 PM'.

This allows you to set up the subject and body of the email, and you can use special tokens to have the system insert text for you (Invoice #, Invoice Date, Customer ID).

You can also now set up a general message that will appear on all invoices, including the printed copies.

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To flag an individual jobsite to receive their invoices via email instead of paper, go to Service Dispatch, Maintenance, Jobsite and view the jobsite in question. You will want to be sure the email account on the General Tab is set to the address that should receive the invoice emails (multiple addresses can be entered if separated by a semi-colon (;)).

Jobsite Maintenance

Jobsite: 3200 Mulford Ave.

General Defaults Maintenance Components

Jobsite Address

Name: SCE Federal Credit Union

Address 1: 3200 Mulford Ave.

Address 2:

City: Lynwood Region: CA

Postal Code: 90262 Country: USA

Email: accountspayable@scefcu.org

Customer Address

Customer: SCE12701 Create Customer...

Name: SCE FEDERAL CREDIT UNION

Address 1: 12701 SCHABARUM

Address 2:

City: Baldwin Park Region: CA

Postal Code: 91706 Country: USA

Phone: Fax:

Email:

Type	Phone Number	Extension	Contact
Primary	(626) 646-2279		Nick
Secondary	(626) 646-2230		David

Contacts:

Call First: (None)

Caller: David

Jobsite Field Notes:

Created: 8/13/2010 1:07:13 PM Changed: ana 6/27/2014 1:24:15 PM 6/27/2014 2:34 PM

On the Defaults Tab you will want to set the Invoice Print option to one of the Email Invoice Print options you have set up.

Jobsite Maintenance

Jobsite: 3200 Mulford Ave.

General Defaults Maintenance Components

Miscellaneous

Call Type: Drain Cleaning

Branch: Ace Pelizon

Zone: Unassigned

Department: Drains

Technician: 078 Eddie Romero

Summarize: All

Maintenance: Billable

Invoice Print: Email Standard

Priority: Regular

Price Level: Standard

Build Type: R/C: C

Tax Group ID: 1 LA County Dist Code: 1 Plumbing

Salesperson: (None) Currency: DOLLAR USA

Credit Information

Terms Code: Net 10 Net 1C

PO Required: []

Purchase Order:

User Defined

User Field 3:

User Field 4:

User Field 5:

User Field 6:

User Field 7:

Comments for Service Order

X- Court St.
In the Plaza de Mexico.

Created: 8/13/2010 1:07:13 PM Changed: ana 6/27/2014 1:24:15 PM 6/27/2014 2:36 PM

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If you want to also email Maintenance Contract billings, you will also want to go to the Maintenance Tab and then the Defaults Tab. Here you will set the Invoice Print to be one of the email Invoice Print types you have set up. Note that you will need to set this on the Defaults for Service item if you bill at time of service, or the Defaults for Billing item if you bill independently.

Jobsite Maintenance

Jobsite: 101 Main

General Defaults Maintenance Components

Contract: 00

General Defaults Billing Service Budget Components

Defaults for: Billing

Trouble

Trouble: Heating

Call Type: Plumbing

Problem: Maintenance

Service Order

Branch: LA

Department: Plumbing

Technician: (Unassigned)

SO Status: Open

Salesperson: (None)

Invoice

Summarize: No Summary

Maintenance: Maint-Full Coverage

Invoice Print: Email Standard

Bill Type: Material

WO Status: Open

Tax Group ID: AZ Arizona St

Terms Code: 1%Disc 1%/1

Customer Level: (None)

Price ID: (None)

Purchase Order:

Created: 1/6/2004 8:02:08 AM Changed: sa 3/24/2010 11:26:37 AM 6/27/2014 2:39 PM

Ascente 4.0 Enhancements/Fixes

Job Cost – Branch/Department Overlays – new feature

The Job Cost Options and Interfaces program has two new fields related to applying Branch/Department Overlays within the Job Cost module:

- Branch/Dept GL Overlay on Costs
- Branch/Dept GL Overlay on Sell

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 0

Retention on Sales Tax ☐ Branch/Dept GL Overlay on Costs ☒

Invoice Suffix 01 Branch/Dept GL Overlay on Sell ☒

Retention Tax Class 0 Non-Taxable

Accrued Retention GL 29705.00.00 UNEARNED SALES (JOB CC)

Close Method Percent Complete

Defaults

Department Project

Job Contract Type Contract

Bill Distribution Project Activity

Cost Distribution Material

Tax Class 1 Taxable

Use Tax Cost Code Sales Tax

Payroll Deduction Codes

Fed WH FWH SDI 004 Misc Ded 1

Fica OAS Other 005 Misc Ded 2

State Tax SWH Vacation 006 Misc Ded 3

Changed: kbuck 5/27/2014 10:50:32 AM 6/18/2014 1:51 PM

If the Branch/Dept GL Overlay on Costs box is checked, the system will apply the Branch/Dept Overlay against the WIP GL Account number for the Cost Distribution assigned to the Cost Code used when applying costs to a Job. The Branch/Department come from the Job.

NOTE: This feature should NOT be used if using WIP accounting. This should only be used if Direct Expensing costs.

If the Branch/Dept GL Overlay on Sell box is checked, the system will apply the Branch/Dept Overlay against the Revenue GL Account number for the Billing Distribution assigned to the Job. The Branch/Department come from the Job.

Job Cost, Journals, Inventory to Job

The update now uses the GL Date as the Inventory Transaction Date, rather than the current system date. (ECR 36056)

Ascente 4.0 Enhancements/Fixes

Mobile module – New Features

The following new items have been added to the Mobile menu:

- Options & Interfaces (Mobile Server) – This option and the next one replace the original, generic Options & Interfaces. We have now split it into two sections, one that relates to options on how the Server side of Mobile should function, and the other that has options related to the Mobile Pro functionality in the field.
- Options & Interfaces (Mobile Client) – See above.
- Pay Code Price Level – See the section on the new Payroll Menu for more details.
- Resolution – This allows you to set up Resolution codes and descriptions for use on the Mobile Pro units. Using Resolution codes saves your Technicians time by allowing them to select generic detailed descriptions of the work performed and not have to type in all of the text. The text can be edited as needed.
- Resolution Grouping – This allows you to set up a 3 tier lookup for your Resolution codes for use on the Mobile Pro units.

Paging - redesigned

The Paging system has been redesigned to greatly simplify processing and add new features. Some of the key features are:

- The Digipage service has been eliminated, therefore the following menu items have been removed:
 - o Paging Status Inquiry
 - o Technical History Purge
 - o Options and Interfaces
 - o Technical History Report
- SNPP and Teletrac paging support has been dropped – only Email/Text now available
- When setting up for Text you just need to enter the phone number and select the provider
- Immediate notification given as to if page sent/not sent
- Attachments can be added to messages
- New combo address field that can be sent to the tech that will typically show as a hyperlink on the phone for ease of map lookup on the phone
- Separate E-mail configurations for Mobile, Service Invoices and Paging
- The Subject Line for the email defaults to "Service Order: 99999" and can be overridden.

Payroll Menu – New Feature

A new Payroll menu has been added to Ascente. This has all of the items needed for processing payroll related transactions. Some key features that this affords are:

- Timecard Entry and update
- Techlog Timecard Update – new feature that can create Timecard transactions based on Techlog entries (see more details below)
- Maintenance of all items related to payroll transactions, including a new Pay Code Price level option (see more details below)
- Reports

NOTE: Due to a change in the way Payroll Leave works in Traverse 11 you will need to insure that the Leave Codes (ie, Vacation, Sick) are named exactly the same as the corresponding Earning Codes. Also the Earning codes MUST have "L" as the Earning Type.

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Payroll, Journals, Techlog Timecard Update – New Feature

A new Techlog Timecard Update feature has been added to the system. This can be accessed from the new Payroll menu or the Service Dispatch, Journals menu.

This new feature allows you to create Timecard transactions based on Techlog entries. The Techlog gets updated from the Call Inquiry and Dispatch option when you enter transactions and the Add to Log box is checked. This program will calculate the Technicians work time based on these log records and then create the appropriate Timecard transactions. If using this method to create Timecard transactions, you would want to run this option daily to keep the information current.

The labor hours can be posted to the Timecard using one of 3 calculation methods:

- Nearest 1/10th hour
- Nearest ¼ hour
- Nearest whole number

Currently this setting, along with the Earning Code to use, must be set up by your customer service representative. Please contact us if you want to use this feature.

A register will print that shows the calculated Work, Drive, Idle, Total and Lunch times based on the Techlog transactions. The table below shows how the program determines the category of time.

	Status Changed To:				
Status Changed From:	Dispatched	Arrived	Closed, Progress Bill	Quit	Other
Dispatch	Idle	Drive	Work	Work	Idle
Arrive	Work	Work	Work	Work	Work
Closed, Progress Bill	Idle	Drive	Work	Work	Idle
Lunch	Lunch	Lunch	Work	Lunch	Lunch
Quit	Off	Off	Work	Off	Off
Other	Idle	Drive	Work	Off	Idle

Once the time has been posted to Timecards using this new option, you can go into Timecard Entry and edit the transactions (if necessary) before posting to Traverse and the Work Orders.

Here is a sample of the new screen:

Techlog Timecard Update

Select Report Values

Range Selection

	Sort by	Beginning	Ending
Branch	<input checked="" type="checkbox"/>	(Beginning)	(Ending)
Tech	<input type="checkbox"/>	(Beginning)	(Ending)

Field Selections

Report Name: Techlog Timecard Update

Work Date: 11/7/2014

Current Payroll Year: 2014

11/7/2014 10:22 AM

Ascente 4.0 Enhancements/Fixes

Here is a sample of the new Register that prints:

11/07/14		Page 1 of 2									
10:32 am		Technician Timecard Update by Service Order									
		All Dates									
<u>WorkDate</u>	<u>S.O. #</u>	<u>W/O</u>	<u>Start</u>	<u>End</u>	<u>WorkTime</u>	<u>DriveTime</u>	<u>IdleTime</u>	<u>TotalTime</u>	<u>LunchTime</u>	<u>OffTime</u>	<u>Last Status</u>
Branch	California	California									
Tech	FranklinJoe	Joe Franklin									
11/7/14	CA000111	CA000111	8:00 am	10:12 am	1.71	.50	.00	2.21	.00	.00	Closed
Total Tech : FranklinJoe					1.71	.50	.00	2.21	.00	.00	# Rec: 1
Total Branch : California					1.71	.50	.00	2.21	.00	.00	# Rec: 1

Payroll, Maintenance, Pay Code Price Level – New Feature

A new Pay Code Price Level option has been added to the system that allows you to define special labor sell prices related to a Price Level/Pay Code combination. This is useful when you have contracted with a group of jobsites to charge a different labor rate than the norm. You can set the rate to be different for Regular, Overtime or any other Pay Code. You must first set up entries in the Pay Code file before adding entries in this screen.

Price Level	Pay Code	Labor Rate
Special	REG	100.0000

Ascente 4.0 Enhancements/Fixes

Payroll, Reports, Certified Payroll Report – Can report on Service work - New Feature

The Certified Payroll Report has been adjusted such that Service work, in addition to Job Cost Jobs, can now appear on the report. To take advantage of this feature you would need to go into Service Dispatch, Maintenance, Jobsite and check the new “Certified Payroll for Service” box for those Jobsites you want to report. Note that ALL service work for these Jobsites will appear on the Certified Payroll Report.

Jobsite Maintenance

Jobsite: 135 Ontario Rd.

General | Defaults | Maintenance | Components

Jobsite Address

Name: Jennifer Yang

Address 1: 135 Ontario Rd.

Address 2:

City: Ontario Region: CA

Postal Code: 91762 Country: USA UNIT

Email:

Customer Address

Customer: (Default) Create Customer...

Name: Default Customer

Address 1: NEW CUSTOMER TEMPLATE

Address 2:

City: Region:

Postal Code: Country: USA

Phone: Fax:

Email:

Payroll

☒ Certified Payroll for Service

Type	Phone Number	Extension	Contact
Primary	(909) 565-1656		Jennifer

Contacts

Call First: Primary

Caller: Jennifer

Jobsite Field Notes

Created: 2/19/2014 9:30:21 AM Changed: sa 2/19/2014 9:30:21 AM

Ascente 4.0 Enhancements/Fixes

Purchase Order Module – New Feature

A new Purchase Order module has been added to Ascente. Upon installation your existing Traverse Purchase Orders will be imported into this new module. Some key features that this affords are:

The screenshot shows the 'Purchase Order Entry' window. Several callouts highlight new features:

- Ship To address defaults to the Branch address**: Points to the 'Ship-to' tab.
- Can change PO#**
PO# is now 10 characters instead of 8
Can assign PO Number ranges by Branch: Points to the PO# field.
- Can change vendor as long as not invoiced**: Points to the Vendor field.
- New Inventory Date and Receive All button**: Points to the 'Inventory Date' dropdown and the 'Receive All' button.
- A new button has been added to allow lookup of PO's by a Part or Part Description**: Points to a magnifying glass icon in the toolbar.

The window contains the following fields and sections:

- General**: Branch (California), Location (101 Joe Smith), PO Date (3/12/2000), Vendor (Acme), Terms Code (210 2%Net10Th), A/P Account Code (Std Standard), Tax Group (OC Orange County), and a Taxable checkbox.
- Purchase Information**: F.O.B. (UPS), Promise Date (3/12/2015), and a Notes section.

Application	Purchase Order	Reports
Service Dispatch	Transactions	Purchase Order Print
Job Cost	Journals	Purchasing Reports
Quotes	Periodic	
Inventory	Maintenance	
Purchase Order	Inquiries	
Paging	Reports	
Flat Rate	Favorites	

The screenshot shows the 'Purchase Order Print' window. A callout highlights a new feature:

- Can print all PO's created for a certain date, branch, vendor or PO# range**: Points to the 'Range Selection' table.

The window includes a 'Select Report Values' section and a 'Range Selection' table:

	Beginning	Ending
Branch	(Beginning)	(Ending)
Vendor	(Beginning)	(Ending)
Purchase Order	(Beginning)	(Ending)
Create Date	(Beginning)	(Ending)

Ascente 4.0 Enhancements/Fixes

Purchase Order Entry

Purchase Order No: 1003 Transaction Type: Order

Main | Ship-to | Detail | Totals

Part: Test Part Description: Addit

Update: Work Order: 010018M Service Order: Jobsite:

Location: Ontario Wareh G/L Account: 99999.00.00 SUSPENSE

	Quantity	Unit	Unit Cost	Extended Cost
Ordered	1.00	Each	10.00	10.00
Received	1.00		10.00	10.00
Invoiced	0.00		0.00	0.00

Tax Class: 1 Taxable Promise Date: 4/7/1968

F6 to add a part on the fly

Can enter negative quantities (adjusts IC).

Can receive PO's directly in Purchase Order Entry

Can link to a Work Order from PO Entry if own the Quick PO module

Can see history of PO line transactions

New button to lookup purchase history by vendor/part of all purchases of part

Purchase Order Transactions

Lookup

Transaction Da	Type	Quantity	Unit Cost	Reference	Part Number	Location	Updated By	Update Date	Created On
6/5/2014	Ordered from WO	60.00	3.99		FP202502	Kevin Jamroz Iburros		6/5/2014 11:32:21 AM	6/5/2014
6/5/2014	Received from WO	60.00	3.99		FP202502	Kevin Jamroz Iburros		6/5/2014 11:32:21 AM	6/5/2014

Cost History for Part 'PREP'

Lookup

Vendor	Location	Quantity	Unit Cost	Extended Cost	Unit of Measure	PO Number	PromiseDate	Updated By	Update Date
UNITED2165	Ontario Warehouse	1.00	6.00	6.00	Each	1003	3/3/1997	CONVERSION	4/18/2014
UNITED2165	Joe Johnson	1.00	6.00	6.00	Each	1138	3/4/1997	CONVERSION	4/18/2014
UNITED2165	David Xie	2.00	6.00	12.00	Each	2638	6/4/1997	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	1.00	5.00	5.00	Each	2839	6/13/1997	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	1.00	5.00	5.00	Each	8843	5/13/1998	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	2.00	10.00	20.00	Each	17943	6/22/2000	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	1.00	50.00	50.00	Each	18617	8/7/2000	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	-1.00	50.00	-50.00	Each	18617	8/7/2000	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	2.00	5.00	10.00	Each	18617	8/7/2000	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	1.00	5.00	5.00	Each	19575	10/4/2000	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	3.00	5.00	15.00	Each	19576	10/4/2000	CONVERSION	4/18/2014
UNITED2165	Max Valderrama	1.00	5.00	5.00	Each	21333	2/8/2001	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	3.00	10.00	30.00	Each	23234	6/26/2001	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	2.00	5.00	10.00	Each	23365	7/5/2001	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	1.00	10.00	10.00	Each	23596	7/19/2001	CONVERSION	4/18/2014

Ascente 4.0 Enhancements/Fixes

The Purchase Order menu options available are;

Transactions	Purchase Order
	A/P Invoice
Journals	A/P Register
Periodic	Move PO's to History
Maintenance	Branch
	Unit of Measure
Inquiries	A/P Vendor Inquiry
Reports	Purchase Order Print
	Purchasing Reports (PO History Report, PO's Not Received, PO's Received Not Invoiced)

In conjunction with the Purchasing changes, the A/P Invoice Entry program has been changed to allow the following:

- Location and Part can now be entered on the line items if the invoice is not linked to a PO or a Job. When the invoice is updated, the on-hand quantity for the part/location will be updated as well.
- A new lookup button has been added next to the Quantity field that allows you to see purchase history if the part on the line is set up in Inventory

Purchase Order Print has the following new capabilities:

- Can now have multiple PO formats
- Can set up Form Printing for PO to automatically print multiple copies of a PO to different printers
- Can print all PO's created on a specific date, branch, or vendor
- Added the ability to print the following fields on the PO:
 - Terms Description
 - Copy Description (from Forms Printing)
 - Vendor Account Number
 - Vendor Email
 - Product Line

Quotes, Report, Quotes Reports, Proposal Form

Added the following features to the Quote Proposal Forms:

- The following fields are now available for printing:
 - Ad Code and Description
 - Customer Phone, Fax and Email
 - Invoice Method
 - Jobsite Email
 - Jobsite Phone #'s (all 5)
- Forms Printer options can now be set up, along with the ability to print a copy description (ie, Customer Copy, File Copy, etc)
- Added a new Quote Proposal Form – PM report option that can be used for Service Contract Proposals.
- Add Tech as a range option for all reports.

Quotes, Transactions, Quotes

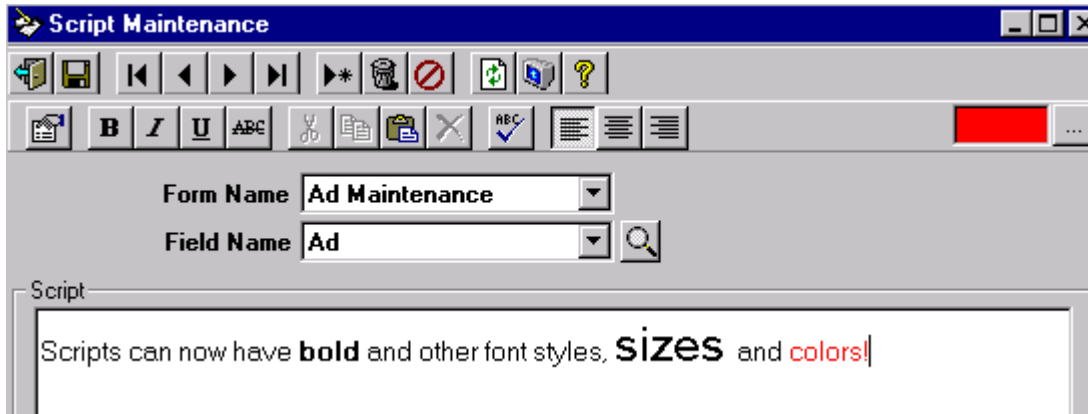
The following new features are now available in Quote Entry:

- The Unit Cost will default from Inventory, if a stock part is entered, but this value can now be overridden.
- When initially entering a detail line you can double click in the Unit Price field to have the system display how it calculated the price. Once the line has been saved, this feature is no longer available.

Ascente 4.0 Enhancements/Fixes

Scripting

Now allows you to adjust the font, size, style (regular, bold, italic, underline) and color.



Service Dispatch, Journals, Prebill Register

The Prebill Register will now allow the updating of Progress Bill type Service Orders where not all Work Orders are closed. Only the closed Work Orders will be moved to history.

Service Dispatch, Journals, Timecard Register

The Timecard Register now writes the Earnings Code into Work Order Lines. This way the Recalc Pricing option can take the Earnings Code into account.

Also the system will now apply Branch/Department overlays to the Burden and Fringe GL postings if the Branch/Dept GL Overlay on Costs box is checked in the Options & Interfaces (Construction) screen and the time is for a Job Cost Job.

Ascente 4.0 Enhancements/Fixes

Service Dispatch, Maintenance, Jobsite

A new check box has been added to flag the Service work for the Jobsite to appear on the Certified Payroll Report. If checked, all Service work for the Jobsite will appear on the Certified Payroll Report. Previously only Job Cost Jobs had this ability.

Type	Phone Number	Extension	Contact
Primary	(909) 565-1656		Jennifer

Service Dispatch, Maintenance, User Field Values

Changed to allow up to 30 characters for a value (was 20).

Service Dispatch, Reports, Accounting, Payment History Report - New

Added a new Payment History Report to the system to assist with auditing payments made from Mobile Pro or directly entered on a Work Order. The report lists payments that are both posted and unposted.

Service Dispatch, Reports, Sales Analysis

Changed the Sales Analysis reports to prompt for Price Level range instead of Customer Level, since Customer Level is no longer used in Ascente.

Service Dispatch, Transactions, A/P Invoice

Added the following capabilities to A/P Invoice Entry:

- Added Extended Cost to the PO Lookup option
- Added the ability to enter Location and Part on a line that is NOT related to a Purchase Order or Job. When the Invoice is updated, the inventory On-Hand quantity will be adjusted by the amount on the line.
- Invoice Complete option now updates Freight and Misc and the associated Tax Classes from the PO.
- Added the ability to move lines up/down on the detail table with a right click.

Ascente 4.0 Enhancements/Fixes

Service Dispatch, Transactions, Call Taking

Moved Tax Group and new Price Level field to the Main tab for ease of controlling pricing.

Call Taking

Service Order: 10423 Call Taken By: Conversion Date: 2/6/2014 Time: 10:37 AM

General | Billing | Invoice | Tech Log | Scheduling

Trouble: No Air Type: Maintenance ASP SC
Problem: remote access ck 1st floor temp by teller line too cold.

Jobsite: *Existing Jobsite* Update Jobsite
Jobsite: Cbt/Oakland 1040002
Name: Cal Bank And Trust/107 Oakland
Address 1: 400 20Th Street
Address 2:
City: Oakland Region: CA
Postal Code: 94612 Country: USA UNIT
Email:

Type	Phone Number	Extension	Contact
Primary			

Contacts: Call First: (None) Caller:

Service Order Comments:

Ad: (None) Terms: 888 Due On F
Price Level: San Jose 70 Tax Group ID: 8905 Oakland
Branch: San Jose Dept: Spot
Maint: Billable PO:
Call Type: Standard Service Call Age:
Invoice: Type: Invoice

Scheduling: Technician: SJ Mashton Status: Closed
Priority: Regular
Zone: Ontario
Est. Hours: 1.00 Sch. Hours: 1.00
Prom Date: 2/6/2014
Prom Time: Anytime
Scheduled: Closed - 2/6/2014 Anytime

Created: 4/17/2014 1:05:39 PM Changed: sa 4/17/2014 1:05:39 PM 6/18/2014 1:58 PM

Ascente 4.0 Enhancements/Fixes

Removed Tax Group, Cust Level, Mat'l Price Break and Price ID from the Billing tab. Tax Group has been moved to the Main tab, all other items are no longer needed.

Adjusted the default size of the Call Taking screen to be larger.

Service Dispatch, Transactions, G/L Journal

Added a new feature where the Description field will default from the prior line, except if the prior line has a job associated with it.

Ascente 4.0 Enhancements/Fixes

Service Dispatch, Transactions, Work Orders

When entering a new line can now double click in the Unit Price field to see how the price was calculated (Note that after the line has been saved this feature is not available).

The screenshot shows the 'Work Order Entry' window with a 'Pricing logic' dialog box open. The dialog box contains the following text:

```

Use price break (for inventory items) from Ic Price level: San Jose 70
Use Last Cost in inventory of = 14.56
Use Last Cost of = 14.56
43.6800 Using Price Break Standard mark-Up Factor: '3' and Cost of
14.5600
  
```

The background window shows a work order for '10437-1' with a subtotal of 648.00. The main table lists items with columns for Line, Purchase Order, Part Number, Description, Location, Bill Type, Unit Cost, Extended Cost, and Unit Price.

Line	Purchase Order	Part Number	Description	Location	Bill Type	Unit Cost	Extended Cost	Unit Price
1		VC	Vehicle Charge	Mike Ashton	Material Invent			
2		NC	Mileage	Mike Ashton	Vehicle Expen			
3	SJP10007	test	testing QPO	Mike Ashton	Material Purch	14.56	14.56	43.68
4								

Have added new Ordered, Bill and Backorder fields. These come into play with Quick PO's. Ordered is the quantity that was ordered on the PO. Billed is quantity that is being charged to this Work Order (cannot be greater than ordered). If less than ordered, the difference will be put into truck stock. If an amount is put in the Backorder field, the PO will NOT have this amount flagged as received.

The screenshot shows the 'Work Order Entry' window with a new line item added. The 'test' part number is entered in the Part Number field, and 'testing QPO' is in the Description field. The 'Ordered Qty', 'Bill Qty', and 'Backorder Qty' fields are highlighted with a red box.

Location	Bill Type	Tax Class	Component	Ordered Qty	Bill Qty	Backorder Qty	Unit Cost	Extended Cost	Unit Price	Extended Price
Mike Ashton	Material Purchases	1 T	(None)	1.00	1.00	0.00	315.00	315.00	567.00	567.00

Ascente 4.0 Enhancements/Fixes

Can now press F6 at the Part field to set up a new part on the fly.

A new “Add Component” flag has been added. If this is checked, when the Work Order is billed a new Component will be added to the Jobsite with this part information. Part Master has a flag to default this.

If a stock part is entered against a location that does not have the part set up, the system will automatically add the part to that location.

Ascente 4.0 Enhancements/Fixes

Service Dispatch, Periodic, Work Restock Register

This option now not only flags the Work Orders as having been restocked, it also updates the Quantities in the inventory system. The Location assigned to the Branch that is linked to the Work Order will have the On Hand value reduced for the part, and the technician vehicle location will have the On Hand value increased. If the part does not exist in either location, the system will automatically add it.

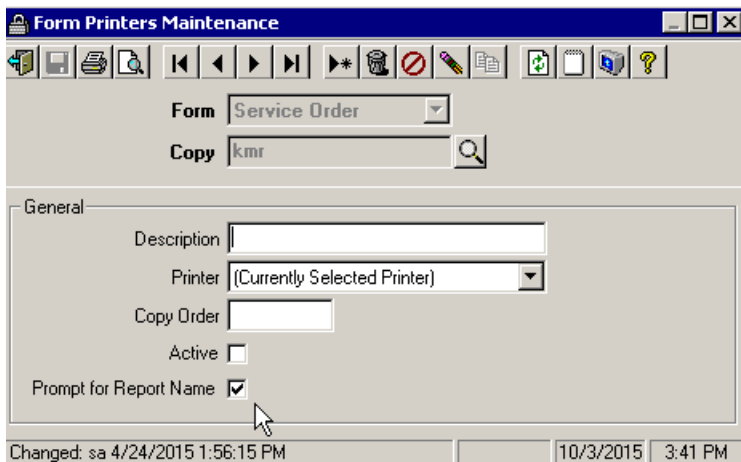
Service Dispatch, Reports, Service Order Print

Adjusted the Company Name on the Maintenance format to be a smaller font and a larger width to accommodate larger company names.

System, Maintenance, Form Printers

Added the ability to set up Form Printers for Purchase Orders and Quotes.

Added a new flag to indicate if the user should be prompted for the report name. This is useful if you have multiple formats and want to choose the format at print time.



The screenshot shows the 'Form Printers Maintenance' window. At the top, there is a title bar with the text 'Form Printers Maintenance' and standard window controls. Below the title bar is a toolbar with various icons. The main area contains a 'Form' dropdown menu set to 'Service Order' and a 'Copy' text field containing 'kmi'. Below these is a 'General' tab with several fields: 'Description' (empty), 'Printer' (dropdown menu showing '(Currently Selected Printer)'), 'Copy Order' (empty), 'Active' (checkbox, unchecked), and 'Prompt for Report Name' (checkbox, checked). A mouse cursor is pointing at the 'Prompt for Report Name' checkbox. At the bottom of the window, there is a status bar with the text 'Changed: sa 4/24/2015 1:56:15 PM' and a date/time stamp '10/3/2015 3:41 PM'.

Ascente 4.0 Enhancements/Fixes

Fixes

General

- **Address Entry:** Fixed a problem where an error would occur if F2 (lookup) was pressed while in the Address 1 field, but no lookup was available in the current form (ie, Branch). (ECR 33288)

Flat Rate, Reports, Flat Rate Price Book

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

Inventory, Maintenance, Part Bill of Material

- Changed the program to save temporary files related to Picture setup in the ReportsTemporary folder instead of C:\, as often users would not have permissions to access C:\. (ECR 35541)

Job Cost, Maintenance, Job

- Fixed a problem with the listing option where the Job # range entered by the user was being ignored. (ECR 36098)

Job Cost, Periodic, Job Use Tax Posting

- Fixed a problem where if the last job only had one cost transaction to be updated, it would be merged with the prior job for both the GL and Job Detail postings. (ECR 35891)

Purchase Order, Reports, Purchasing Reports, PO's Received Not Invoice

- Fixed a problem where the report was including items that had been received and invoiced in full and was excluding non-stock items. (ECR 36099)
- Fixed an issue where the PO Type was not being printed. (ECR 36134)

Purchase Order, Transactions, Purchasing Order

- Fixed an issue where the unit cost would be rounded incorrectly if you left it at zero and entered in an extended cost. (ECR 36110)
- Fixed an issue where the location on the main tab was not defaulting correctly when based on the Branch, when the default branch was used. (ECR 36128)
- Fixed an issue where the F2 key was not working on the Ship To tab. (ECR 36097)
- Fixed an issue where if a Job was selected on the Ship To tab the address information was not being pulled in. (ECR 36106)

Quotes, Transactions, Quotes

- Fixed a problem where the Jobsite address would be cleared if a Job is created from the Quote. (ECR 34898)
- Fixed a problem where a locking error would occur if deleting lines and the totals tab was set to "Price" for Overhead. (ECR 36061)

Service Dispatch, Inquiries, Work Order History Inquiry

- Fixed a problem where the toolbar security for a user was not being respected. (ECR 36409)

Service Dispatch, Journals, Service Order Workflow Register

- Fixed a problem where an error would occur if a Mobile Line Date range was entered.

Ascente 4.0 Enhancements/Fixes

Service Dispatch, Maintenance, Jobsite

- Fixed a problem where the Change ID function for a Component would not update the custom fields or notes related to the Component. (ECR 34931)
- Fixed a problem on the Contract tab where the system was comparing the Contract Start Date to the Next Amortization Date, even if the amortization feature was not turned on. (ECR 36181)
- Fixed a problem where the Tax Group was not defaulting correctly on a new record. This now defaults from the postal code assigned to the Jobsite and if not set there will come from the Customer.
- The Sales Rep will now default from the Customer if not set by the user when adding a new Jobsite.

Service Dispatch, Maintenance, Worker Compensation

- Fixed a problem where the experience factor would be reset back to 1 after making a change, if the display order was set to alphabetical. (ECR 34408)

Service Dispatch, Reports, Accounting, A/R Payment History

- Made corrections to the formatting and adjusted the report to look more standard. AcctgPaymentHistoryInquiry.rpt

Service Dispatch, Reports, Jobsite Reports, Jobsites by Customer

- Fixed a problem where the report was hardcoded to read the customers from the CPU company. (ECR 35665)

Service Dispatch, Reports, Label Printing, Service Order Labels (5160)

- Fixed a problem where the report was always giving an error.

Service Dispatch, Reports, Schedule Report

- Fixed a problem where an error would occur if a range of supervisors was entered. (ECR 36237)

Service Dispatch, Reports, Work Order Quote

- Fixed a problem where an error would occur if there were no Service Orders within the range entered by the user. (ECR 35789)

Service Dispatch, Transactions, A/P Invoice

- Fixed an issue where F6 from the Part field was not taking you to Part Maintenance. (ECR 36057)
- Fixed an issue where if you changed the default GL account it would immediately revert back to the default, but if you changed it a second time it would remain. (ECR 36031)

Service Dispatch, Transactions, Call Taking

- Fixed an issue where the Price field was not being enabled/disabled correctly. Now is enabled if the Invoice Method is Fixed Price or NTE and is disabled if the Invoice Method is T&M. Also set to the Invoice Amount on the Invoice Tab is only enabled if the Invoice Method is T&M and the Calculate Invoice Amount Flag in Service Options on the Work Order Tab is not checked. (ECR 36015)

Service Dispatch, Transactions, Work Orders

- Fixed a problem where the GL Acct button label would not be displayed correctly in some situations. (ECR 35571)
- Fixed an issue where the Price field was not being enabled/disabled correctly. Now is enabled if the Invoice Method is Fixed Price or NTE and is disabled if the Invoice Method is T&M. Also set to the Invoice Amount on the Invoice Tab is only enabled if the Invoice Method is T&M and the Calculate Invoice Amount Flag in Service Options on the Work Order Tab is not checked. (ECR 36015)
- Fixed an issue where the Invoice Amount was not getting set correctly in some situations for NTE type invoices. (ECR 36005)
- Fixed an issue where the spiff amount was cleared on stock items when the Recalc Pricing button was used. Note that the spiff amount will still be cleared on non-stock items. (ECR 36129)

Ascente 4.0 Enhancements/Fixes

System, Reports, Log Reports, Version Log Listing

- Fixed an issue where incorrect range values were being asked. (ECR 35950)