




New User Introduction

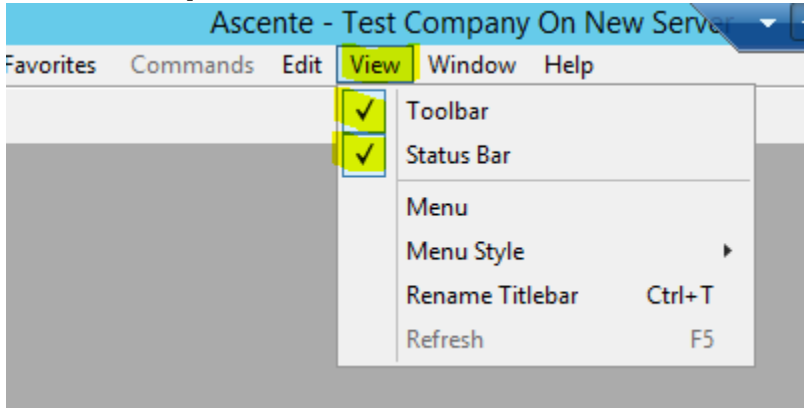
March 2018

1. Logging Out of Ascente

- File / Exit
- Click on the red 'X' on the top-right corner
- Click on the [Exit] button 
- Be sure to close all forms first.
- DO NOT just close the rdp session or shutdown the workstation without logging out first.

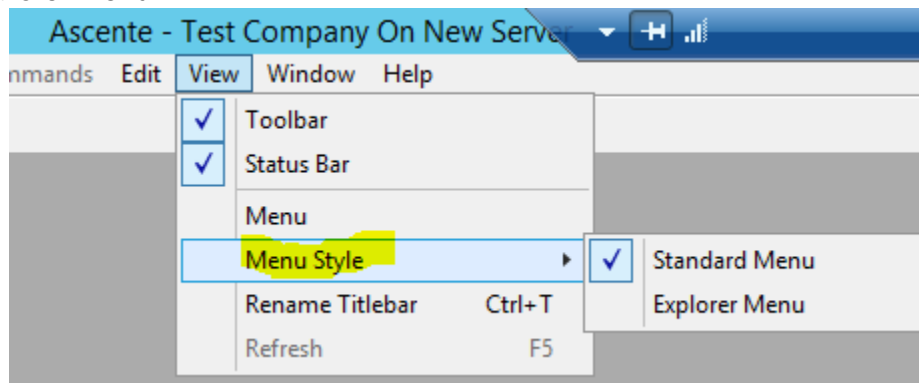
2. View

- Check [Toolbar]
- Check Status Bar]



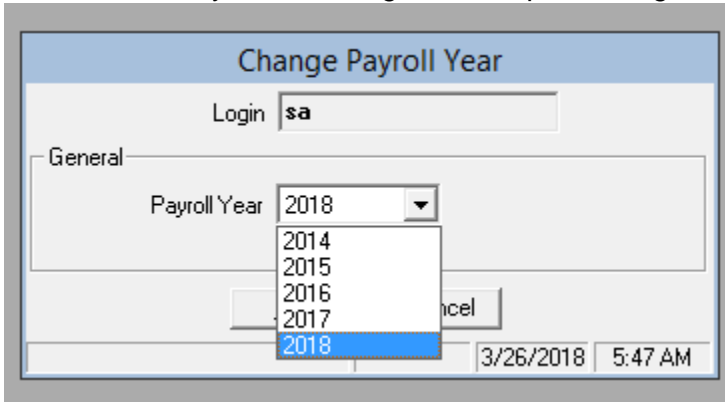
3. Menus

- View / Menu
- View / Menu Style
 - Standard Menu
 - Explorer Menu



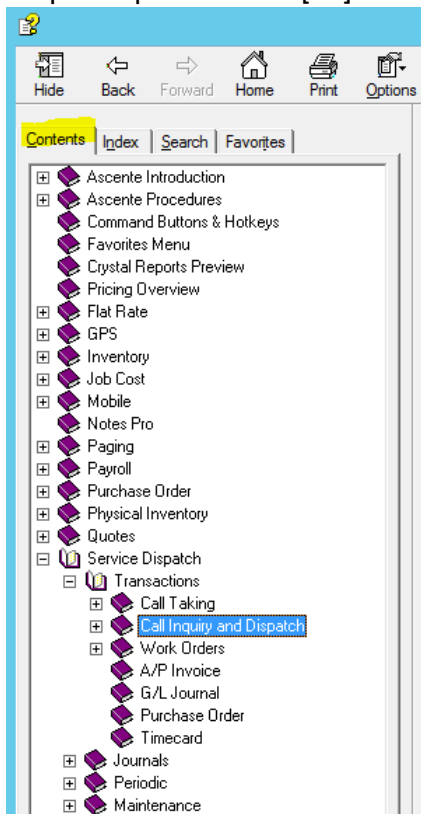
4. File / Change Payroll Year

- Must be set correctly before doing timecard processing



5. Help Resources

- Help / Help Contents / [F1] from any program



• Help / Index

Call Inquiry and Dispatch

Purpose

Call Inquiry & Dispatch is used to organize and view service dispatcher which enables effective processing of service call

Call Inquiry can view both service and maintenance calls. By

After a call is entered, Call Inquiry is used to dispatch the call additional technicians to the jobsite, and close the call when

There are three primary methods of displaying the service on your manpower requirements and technicians scheduled call scheduling is based on the schedule dates and times that are

The following options are available by right clicking on a call

- Select Schedule - Displays the current schedule record in
- Delete Schedule (Only available if Schedule records exist:
- Copy Schedule (Only available if Schedule records exist f

• Help / Search

Title	Location	Rank
Call Inquiry and Dispatch	Ascente On-Li...	1
Options and Interfaces ...	Ascente On-Li...	2
FAQ	Ascente On-Li...	3
Technician	Ascente On-Li...	4
Service Order Status	Ascente On-Li...	5
Call Taking	Ascente On-Li...	6
Fringe/Burden Processi...	Ascente On-Li...	7
Technician Log Timecard	Ascente On-Li...	8
Technician Log Timeca...	Ascente On-Li...	9
Work Orders	Ascente On-Li...	10
Service Invoice Proces...	Ascente On-Li...	11
Jobsite	Ascente On-Li...	12
Timecard	Ascente On-Li...	13
Service Order Histori...	Ascente On-Li...	14

• Website Resources

- <http://www.compusource.com/>
- <http://www.compusource.com/Support/index.php>

• Webinars

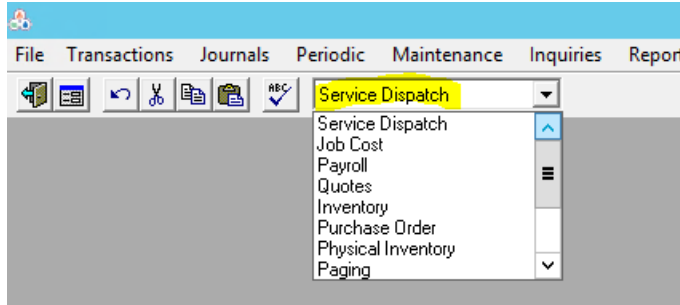
- These are free and typically offer a few every month.
- This link will get you to the current scheduled webinars and you can register from there.
<http://www.compusource.com/Support/Training/webinar-schedule-Ascente.php>

• Website Training Videos

- This link will get you to the library of recorded training videos:
<http://servicecontractorsoftware.com/client-support/training-videos/>
- Year End Processing Procedures
<http://servicecontractorsoftware.com/client-support/year-end-procedures-ascente/>

6. Changing Ascente Modules

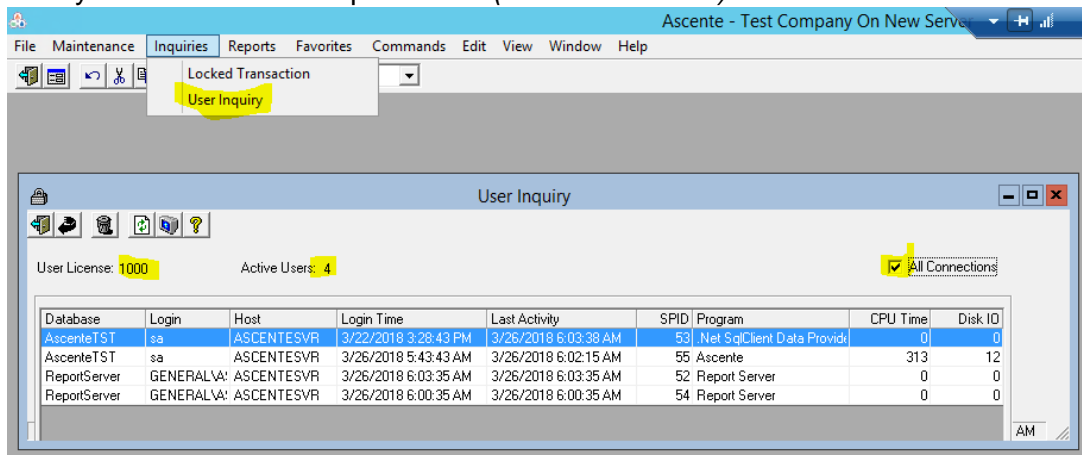
- It is important you be in the correct module so that you can get to the program you need to use.



- Most companies limit user’s menu access. If there is a menu or menu item you do not have access to, you will need to let your company’s security administrator know.

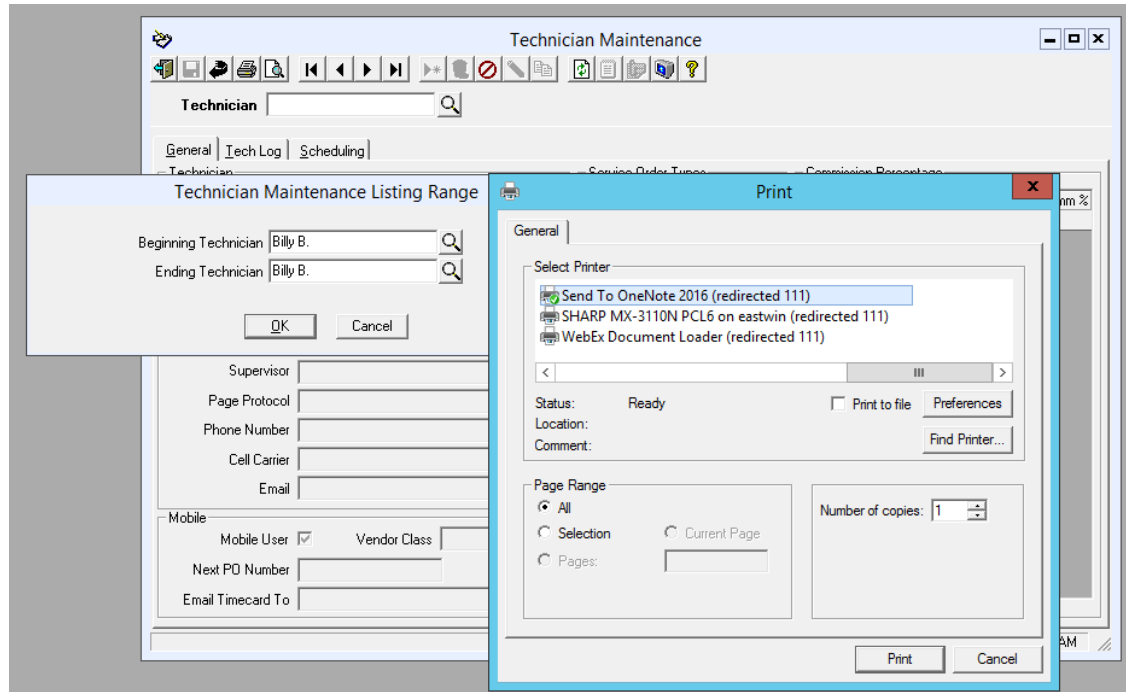
7. How many users can run Ascente at the same time?

- Every company has a limited number of Ascente licenses. The license count determines how many concurrent users can be running Ascente at one time.
- System / Inquiry / User Inquiry
 - See the total user licenses your company has
 - See the active users running Ascente
 - Optionally delete active users processes (*Use with caution*).



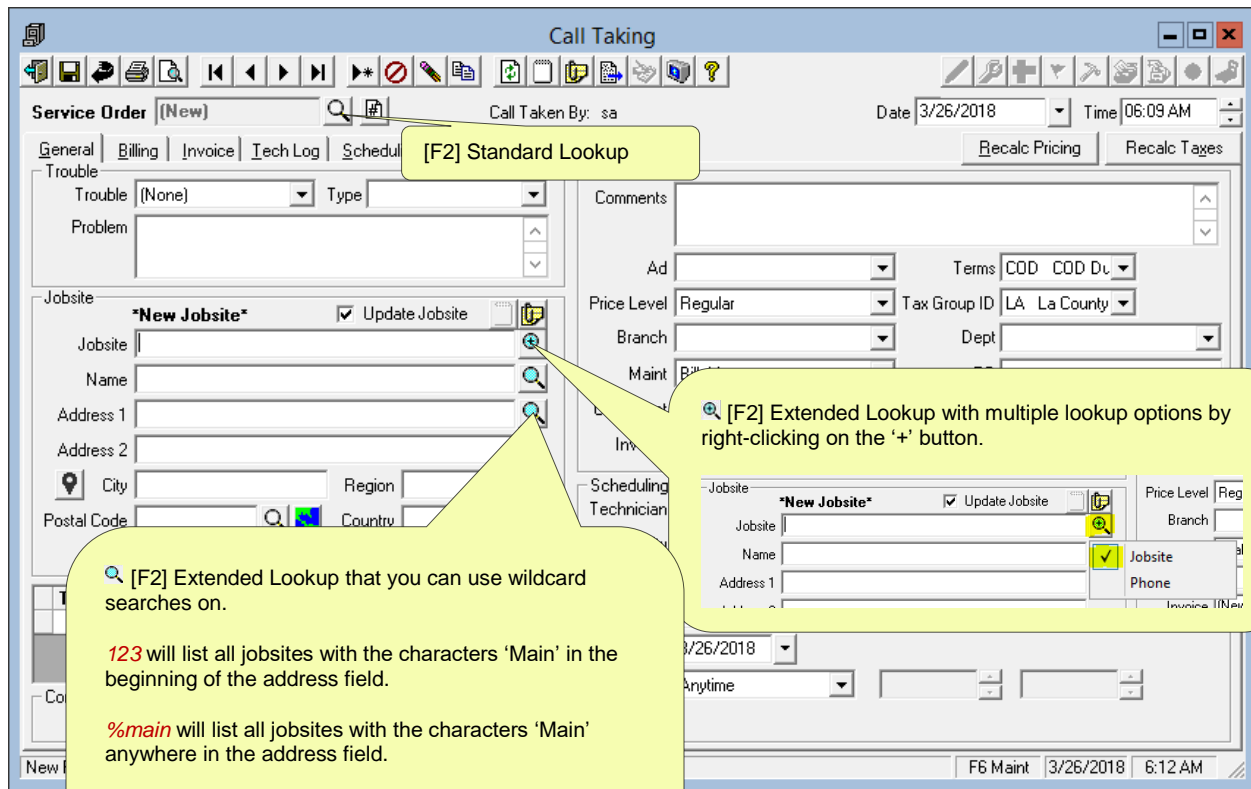
8. How do I determine what my current default printer is?

- When ever you print standard reports, the windows standard Print dialog box will be displayed.
 - You can see the selected printer there.
 - You can change your printer there
 - You can set a new default printer there by right-clicking on a displayed printer and selecting ‘Set as Default’.



9. Lookups

Throughout Ascente, lookups are available from most programs and there are different types of lookups:



10. Use the [Tab] Key

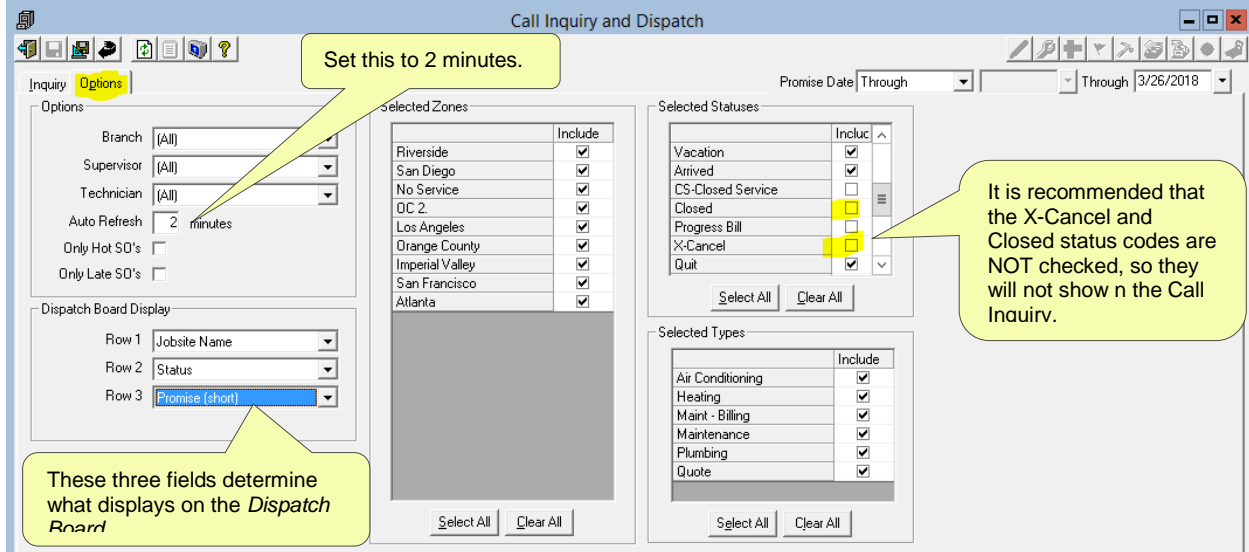
This will assure that all the required fields are entered.


11. Tab Stops [F3]

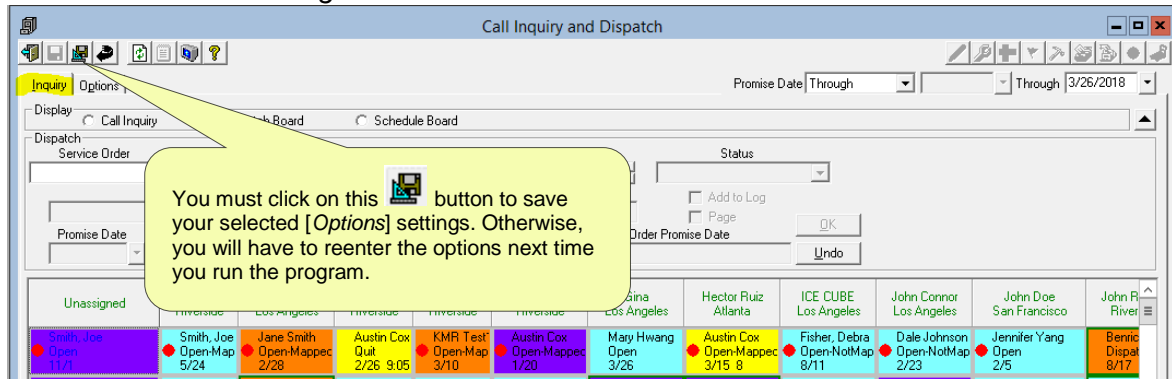
Use the [F3] key to toggle the tab stop setting for any field so that it always stops at the required fields and does not stop at the nonrequired fields.

12. Call Inquiry Recommendations


- Set and Save your Call Inquiry Options
- These can be unique for every user and company. These are some general recommendations:

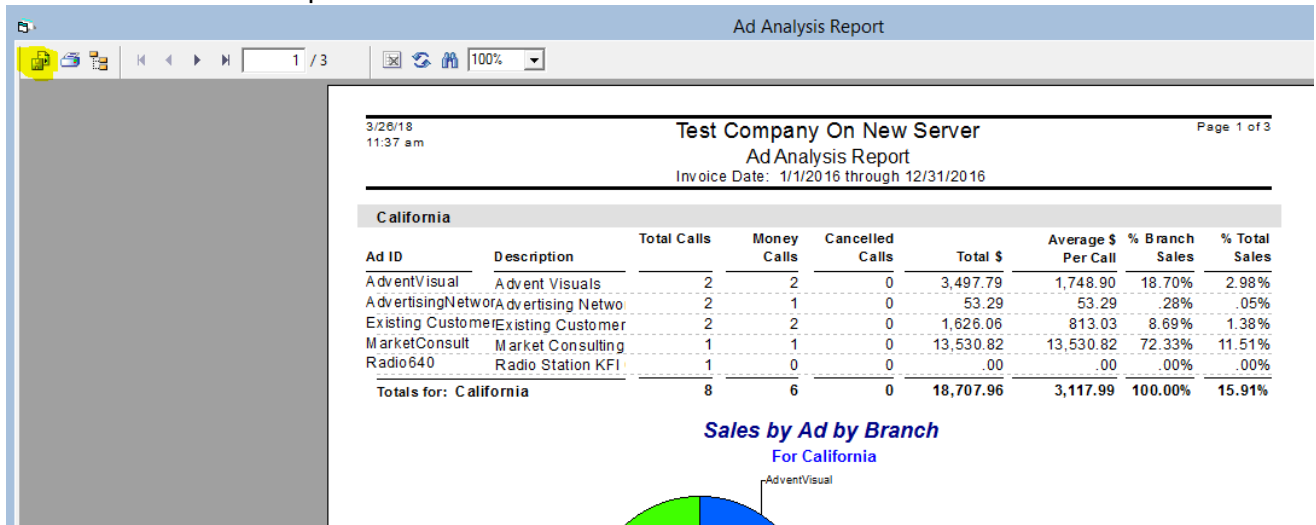


- After you make these changes to the Call Inquiry & Dispatch [Options], be sure to:
 - Click on the [Inquiry] tab
 - Click on the *Save Settings Button* 

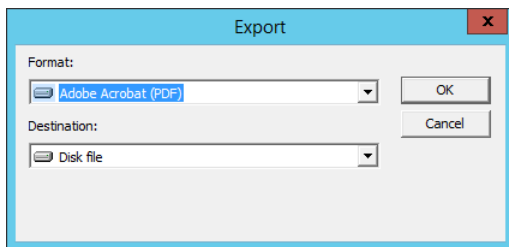


13. Exporting Ascente Reports

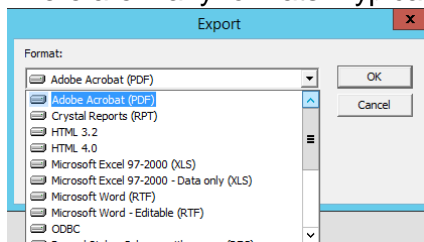
- To export any Ascente report, you must:
 - Preview the Ascente report and click on the  button



Ad ID	Description	Total Calls	Money Calls	Cancelled Calls	Total \$	Average \$ Per Call	% Branch Sales	% Total Sales
AdventVisual	Advent Visuals	2	2	0	3,497.79	1,748.90	18.70%	2.98%
AdvertisingNetwork	Advertising Netwo	2	1	0	53.29	53.29	.28%	.05%
Existing Customer	Existing Customer	2	2	0	1,626.06	813.03	8.69%	1.38%
MarketConsult	Market Consulting	1	1	0	13,530.82	13,530.82	72.33%	11.51%
Radio640	Radio Station KFI	1	0	0	.00	.00	.00%	.00%
Totals for: California		8	6	0	18,707.96	3,117.99	100.00%	15.91%

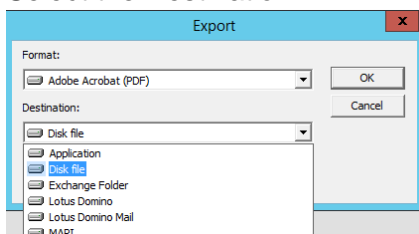


- Select the Format:
 - There are many formats. Typically, Adobe (PDF), Excel, Word or Text are selected.



- Select the destination:
 - Disk File will allow you to save the exported file. Be sure to note where it is saved it and what the file name is.

- Select the Destination:



- Typically, Disk File is selected. You can select Application if there is an application installed to view the exported file.

- This will:
 - Save the exported file
 - Try to load that exported file in the program associated with the file extension.