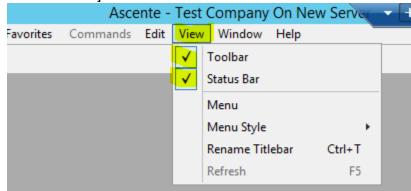


New User Introduction

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]



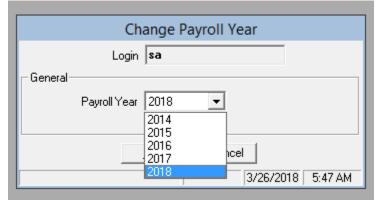
- 3. Menus
 - View / Menu
 - View / Menu Style
 - o Standard Menu
 - o Explorer Menu

	• · · •						
Asce	ente -	Test	Company C	On New S	Server	- [H .I
nmands	Edit	View	Window H	Help		_	
		\checkmark	Toolbar				
		\checkmark	Status Bar				
			Menu		_		
			Menu Style		۱.	\checkmark	Standard Menu
			Rename Title	bar (Ctrl+T		Explorer Menu
			Refresh		F5		

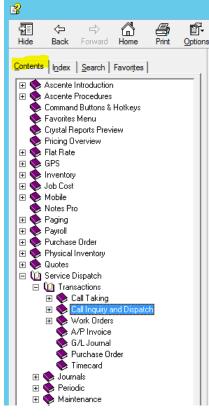


4. File / Change Payroll Year

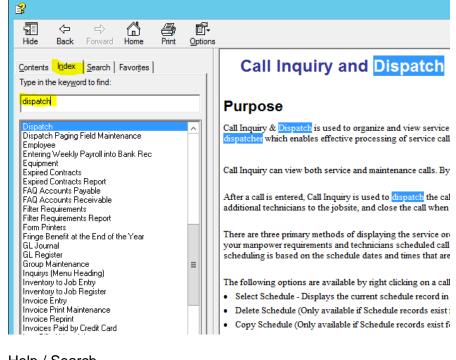
• Must be set correctly before doing timecard processing



- 5. Help Resources
 - Help / Help Contents / [F1] from any program



• Help / Index



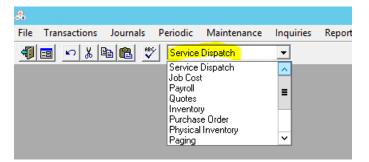
• Help / Search

Contents Index Search Favorites Type in the word(s) to search for: Image: Content of the word(s) to search for: Image: Content of the word(s) to search for: dispatch Image: Content of the word(s) to search for: Image: Content of the word(s) to search for: dispatch Image: Content of the word(s) to search for: Image: Content of the word(s) to search for: dispatch Image: Content of the word(s) to search for: Image: Content of the word(s) to search for: Select topic: Found: 59 Image: Content of the word(s) to search for: 1 Call Inquiry and Dispatch Ascente On-Li 1 2 Ascente On-Li 2 FAQ Ascente On-Li 3 Ascente On-Li 5 Call Taking Ascente On-Li 5 Call Taking Ascente On-Li 5 Ascente On-Li 5 E E Technician Log Timecard Ascente On-Li 5 Service Invoice Proces Ascente On-Li 9 York Orders Ascente On-Li 10 Service Invoice Proces Ascente On-Li 11 Jobsite Ascente On-Li 12	2		
Type in the word(s) to search for: dispatch Display Select topic: Found: 59 Title Location Ra Call Inquiry and Dispatch Ascente On-Li 1 Options and Interfaces Ascente On-Li 2 FAQ Ascente On-Li 3 Technician Ascente On-Li 5 Call Taking Ascente On-Li 9 Work Orders Ascente On-Li 9 Work Orders Ascente On-Li 10 Service Invoice Proces Ascente On-Li 11 Jubsite Ascente On-Li 12		Home Prir	nt Options
Display Select topic: Found: 59 Title Location Ra 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 5 Fringe/Burden Processi Ascente On-Li 8 Technician Log Timecad Ascente On-Li 9 Work Orders Ascente On-Li 9 Work Orders Ascente On-Li 10 Service Invoice Process Ascente On-Li 11 Jobsite Ascente On-Li 12			[
Select topic: Found: 59 Title Location Ra Call Inquiry and Dispatch Ascente On-Li 1 Options and Interfaces Ascente On-Li 2 FAQ Ascente On-Li 3 Technician Ascente On-Li 5 Call Taking Ascente On-Li 5 Call Taking Ascente On-Li 7 Fechnician Log Timecard Ascente On-Li 7 Technician Log Timecard Ascente On-Li 8 Technician Log Timecard Ascente On-Li 9 Work Orders Ascente On-Li 10 Service Invoice Proces Ascente On-Li 11 Jobsite Ascente On-Li 12	dispatch		<u>_</u>
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	Options and Interfaces FAQ Technician Service Order Status Call Taking Fringe/Burden Processi Technician Log Timecard Technician Log Timeca Work Orders Service Invoice Proces	Ascente On-Li Ascente On-Li Ascente On-Li Ascente On-Li Ascente On-Li Ascente On-Li Ascente On-Li Ascente On-Li Ascente On-Li	2 3 4 5 6 7 8 9 10 11

- Website Resources
 - o http://www.compusource.com/
 - o http://www.compusource.com/Support/index.php
- Webinars
 - These are free and typically offer a few every month.
 - This like 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).

								Ascente - Te	st Company	On New Se	erver	+
Maintenance	e Inquiries	Reports	Favorites	Commands	Edit	View Window	Help					
	E Locked	d Transact nquiry	tion	T								1
					Lise	r Inquiry						_ 0
					030	a inquiry						
) 2 & _	¢ 📦 💡				030	a mquny						
		Active U	lsers <mark>: 4</mark>		030	a mquny					nnections	
		Active U Host		in Time		ist Activity		SPID Program		CPU Time		
User License: 10	00		Log	in Time 2/2018 3:28:43 Pi	La		sM		ent Data Provide	- <u>-</u>	nnections	
User License: 10	Login	Host	Log SVR 3/2		La M 3/	ist Activity			ent Data Provide	- <u>-</u>	nnections]
User License: 10 Database Ascente T ST	000 Login Sa	Host ASCENTE ASCENTE	Log SVR 3/2 SVR 3/2	2/2018 3:28:43 Pł	La M 3/ M 3/	st Activity 26/2018 6:03:38 /	M	53 .Net SqlClie		CPU Time 0	nnections Disk ID]
User License: 10 Database Ascente TST Ascente TST	DOO Login sa sa	Host ASCENTE ASCENTE ASCENTE	Log SVR 3/2 SVR 3/2 SVR 3/2	2/2018 3:28:43 Pt 6/2018 5:43:43 At	La M 3/ M 3/ M 3/	st Activity 26/2018 6:03:38 / 26/2018 6:02:15 /	M M	53 .Net SqlClie 55 Ascente	ver	CPU Time 0 313	nnections Disk IO 0 12	

- 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.
 - \circ $\;$ 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'.



	Technician Maintenance	- - X
General Tech Log Scheduling	- Service Arder Turce - Convission Researctore	x
Technician Maintenance Listing Range Beginning Technician Billy B. Ending Technician Billy B. QK Cancel	General General Select Printer Selec	<u>am %</u>
Supervisor Page Protocol Phone Number Cell Carrier	III Status: Ready Location: Prior to file Comment: Find Printer	
Email Mobile Mobile User Vendor Class Next PO Number Email Timecard To	Page Range	
	Print Cancel	

9. Lookups

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

J	Call Taking	
- 7 ⊡ ⊅ ∰ ⊡. H 4 → H → K		₽₽ ₽ ₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽₽
Service Order (New)	Call Taken By: sa	Date 3/26/2018 Time 06:09 AM
General Billing Invoice Tech Log Schedu	[F2] Standard Lookup	<u>R</u> ecalc Pricing Recalc Taxes
Trouble (None) Type	Comments	
Problem		
	✓ Ad	Terms COD COD Du 🔫
-Jobsite *New Jobsite* ✓ Upd	ate Jobsite	
Jobsite	R Branch	▼ Dept ▼
Name	Maint	But the second sec
Address 1		Refer to the set of th
Address 2	Im	right-clicking on the '+' button.
City Region	Technician	Jobsite *New Jobsite* 🔽 Update Jobsite 🏾 🎼 Price Level Reg
Postal Code Q S Country		Jobsite Branch
[F2] Extended Lookup that y	ou can use wildcard	Name Jobsite P Address 1 Phone
searches on.		
123 will list all jobsites with the	characters 'Main' in the	V26/2018 -
beginning of the address field.		Anytime
%main will list all jobsites with	the characters 'Main'	
anywhere in the address field.		F6 Maint 3/26/2018 6:12 AM
123 %main will list all jobsites the beginning and 'Main' anyw		
Mo		
nte-In		
		HVAC P

9	
	Taking – 🗖 🗙
	▙》♥?
Service Order (New) Call Taken By	: sa Date 3/26/2018 💌 Time 06:09 AM 👘
<u>G</u> eneral <u>Billing</u> <u>Invoice</u> <u>I</u> ech Log <u>S</u> cheduling	<u>Recalc Pricing</u> Recalc Ta <u>x</u> es
Trouble (None) Type	Service Order
Problem	
	ar 🔄 Tax Group ID LA La County 💌
J _{obs} [F4] Dropdown Lookup	▼ Dept
Nar Seed the lookup by typing the first few characte	rs in order PD
Address too narrow down the selected records and to loc	
Address record quickly	Type Invoice
	Scheduling
	Technician (Unassigned) 🔹 Status Open 💌
	Priority Regular
Email	
Type Phone Number Extension Contact	
	Est. Hours 1.00 Sch. Hours: 0.00
	Prom Date 3/26/2018 -
Contacts	Prom Time Anytime
	Scheduled:
New Record	F6 Maint 3/26/2018 6:12 AM

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 is 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 dome general recommendations:

@	Call Inqu	uiry and Dispatch	= - ×
Inquiry Options	his to 2 minutes.	,	 ✓ Ø + Y > Ø > ● Ø ✓ Through 3/26/2018 ✓
Dptions Branch (All) Supervisor (All) Technician (All) Auto Refresh 2 minutes Only Hot SO's Only Late SO's Dispatch Board Display Row 1 Jobsite Name Row 2 Status Row 3 Promise (short) These three fields determine what displays on the Dispatch Roard	Riverside San Diego No Service OC 2. Los Angeles Orange County Imperial Valley San Francisco	Selected Statuses Incluic ^ Yacation Arrived Y Orsed Y	It is recommended that the X-Cancel and Closed status codes are NOT checked, so they will not show n the Call Inauirv.

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

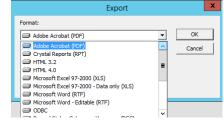
	Call Inquiry and Dispatch			
		Promise Date Through		P +
Service Order You must click on this butt your selected [<i>Options</i>] settings you will have to reenter the option you run the program.	. Otherwise,	Status Add to Log Page Date Undo		
Unassigned Hiverside Los Angeles Hiverside Hiverside	aina Cos Angeles	Hector Ruiz Atlanta Los Angeles	John Connor Los Angeles	John Doe John R San Francisco River ≣
Smith. Joe Open-Map 11/1 Sinth. Joe Open-Map 2/28 9.05 3/10 3/10 3/10 3/10 3/10 3/10 3/10 3/10		Austin Cox Open-Mappec 3/15 8 Fisher, Debra Open-NotMap 8/11	Dale Johnson Open-NotMap 2/23	Jennifer Yang Open 2/5 National Dispat



- 13. Exporting Ascente Reports
- To export any Ascente report, you must:
 - Preview the Ascente report and click on the
 Image button

5					Ad Analys	is Report				
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		3/26/18 11:37 am		Test C		y On New			F	age 1 of 3
				Invoice		lysis Report 2016 through 1				
		California								
		Ad ID	Description	Total Calls	Money Calls	Cancelled Calls	Total \$	Average \$ Per Call	% Branch Sales	% Total Sales
		A dv entV isu al	Advent Visuals	2	2	0	3,497.79	1,748.90	18.70%	2.98%
		AdvertisingNetw	orAdvertising Netwo	2	1	0	53.29	53.29	.28%	.05%
		Existing Custom	erExisting Customer	2	2	0	1,626.06	813.03	8.69%	1.38%
		MarketConsult Radio640	Market Consulting		1	0	13,530.82	13,530.82		11.51%
			Radio Station KFI	1	0	0	.00	.00	.00%	.00%
		To tals for: Cal	ifornia	8	6	0	18,707.96	3,117.99	100.00%	15.91%
				Sa		d by Bran	ch			
					For C	alifornia				
					AdventVi	isual				
			4							
	Export		x							
Format:										
Adobe Acrobat (PDF)		• ОК	1							
			4							
Destination:		Cancel								
Disk file		•								
,										

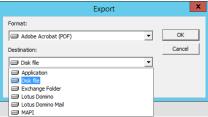
- Select the Format:
 - There are many formats. Typically, Adobe (PDF), Excel, Word or Text are selected.



• Select the destination:

0

- 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.

