

***Start the recording .....***



# Ascente System Tab Stop Maintenance

Presenter: Mark Allman  
July 2019

[www.compusource.com](http://www.compusource.com)

<http://www.servicecontractorsoftware.com/>



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# Ascente – System Tab Stop Maintenance

## Overview

Tab Stop Maintenance allows you to customize how the Ascente forms work when the user presses the [Tab] key:

- The *order* in which the on-screen cursor moves from field to field within a program screen.
- Which fields will either *stop* at or be *skipped*.

These settings can be for a single user or for a group of users.



# Ascente – System Tab Stop Maintenance

Call Taking

Service Order (New) Call Taken By: sa Date 7/19/2019 Time 08:28 AM

General | Billing | Invoice | Tech Log | Scheduling

Recalc Pricing Recalc Taxes

Trouble

Trouble **None** Type

Problem

Jobsite

**\*New Jobsite\***  Update Jobsite

Jobsite

Name

Address 1

Address 2

City Region

Postal Code Country

Email

Service Order

Comments

Ad Terms COD COD Du

Price Level Regular Tax Group ID LA La County

Branch Dept

Maint Billable PO

Own/Rent Septic

Invoice (New) Time Invoice

Scheduling

Technician (Unassigned)

Priority Regular

Zone

Est. Hours 1.

Prom Date 7/19/2019

Prom Time Anytime

Scheduled:

Script

Hello ????????, how can we help you today?

[F2] Lookup Available

Type	Phone Number	Extension	Contact

Contacts

Call First Caller

New Record F6 Maint 7/19/2019 8:28 AM

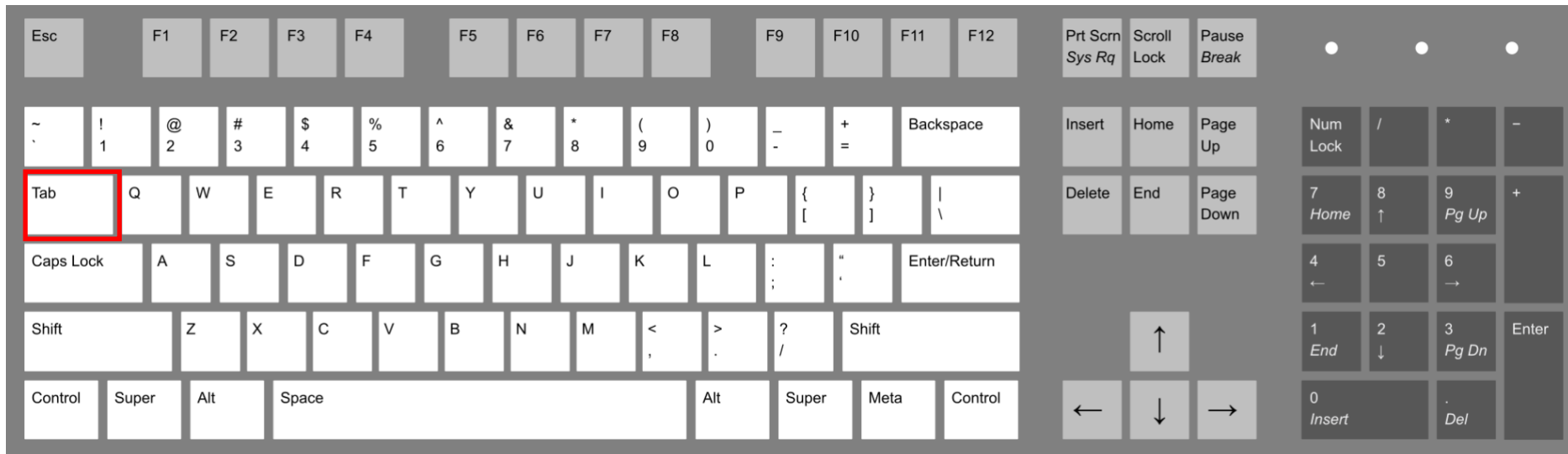


**ASCENTE**  
HVAC Plumbing Software

# Ascente – System Tab Stop Maintenance

## Overview

If your users refuse to use the [tab] key to move between fields and insist on only using the mouse, you will not benefit from setting up Tab Stop records.



# Ascente – System Tab Stop Maintenance

## **So Why Would I Want To Set Tab Stops?**

You want to do this in order to optimize your order entry operations for the Call Taking program.

You can predetermine the order your call takers prompt for information with the callers and assure that the relevant information is requested, and unnecessary information is skipped.

This can help make the call taking process quicker.

We always recommend that the call taker direct the conversation and prompt for the information in the order the screen prompts for it as opposed to trying to just keep up with the caller.



# Ascente – System Tab Stop Maintenance

## Considerations

- These are defined by *Ascente / System / Maintenance User* and by *Form*.
- Every user can be setup differently, but this is not generally recommended.
- Every *user* is a member of a *group*. You can setup a user's tab stop settings for a specific form and then optionally copy his tab stop settings for the form to all other users in his same group. This will save you a lot of time and standardize the tab stop settings.
- All new users will have a default tab stop records that basically stop all fields in the order they are on the screen. This is not recommended for the Call Taking form.

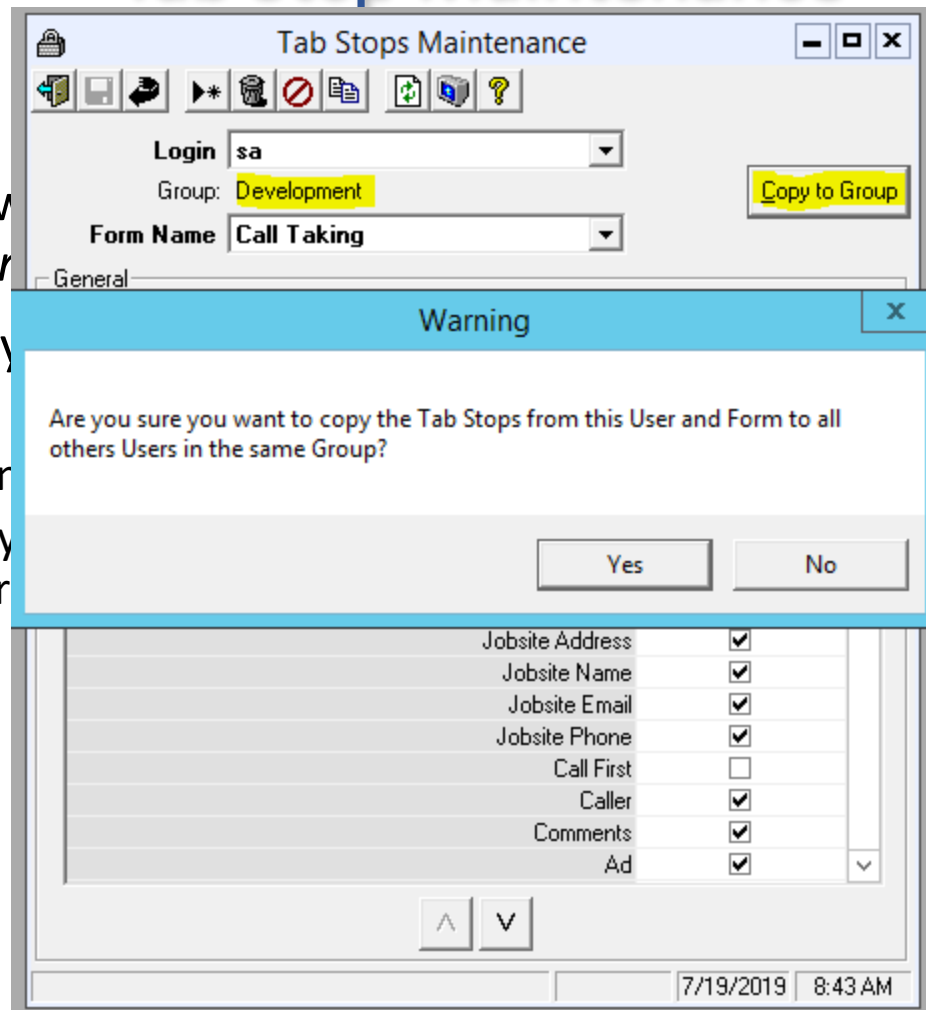


# Ascente – System Tab Stop Maintenance

## Setup

There are two ways to setup a specific form for a user.

1. From the System Maintenance window:
  - You can add a new user.
  - You can change the user's group.
  - You can copy the Tab Stops from one user to another user in the same group.



ings for a user

user in the  
users.



# Ascente – System Tab Stop Maintenance

Call Taking

Service Order (New) Call Taken By: sa Date 7/18/2019 Time 05:52 PM

General | Billing | Invoice | Tech Log | Scheduling

Trouble  
Trouble (None) Type  
Problem

Jobsite  
**\*New Jobsite\*** Update Jobsite  
Jobsite  
Name  
Address 1  
Address 2  
City Region  
Postal Code Country  
Email

Type	Phone Number	Extension	Contact

Contacts  
Call First Caller

Service Order  
Comments  
Ad  
Price Level Regular  
Branch  
Maint Billable PD  
Own/Rent Septic  
Invoice (New) Type Invoice

Scheduling  
Technician (Unassigned) Status Open  
Priority Regular  
Zone  
Est. Hours 1.00 Sch. Hours: 0.00  
Prom Date 7/18/2019  
Prom Time Anytime  
Scheduled:

Tab Stop for Input Date

Tab Stop

OK Cancel

New Record 7/18/2019 5:52 PM



# Ascente – System Tab Stop Maintenance

## Setup

These are the defaults for the Call Taking form.

The image displays two overlapping software windows from the Ascente HVAC Plumbing Software. The background window is titled 'Tab Stops Maintenance' and shows a 'General' tab with a list of fields and checkboxes for 'Tab Stop' maintenance. The foreground window is titled 'Call Taking' and shows a 'Service Order' form with various input fields and tabs.

**Tab Stops Maintenance - General Tab**

Field	Tab Stop
Service Order	<input checked="" type="checkbox"/>
Input Date	<input checked="" type="checkbox"/>
Input Time	<input checked="" type="checkbox"/>
Call Taking Tabs	<input checked="" type="checkbox"/>
<b>General</b>	<input type="checkbox"/>
Trouble	<input checked="" type="checkbox"/>
Type	<input checked="" type="checkbox"/>
Problem	<input checked="" type="checkbox"/>
Jobsite	<input checked="" type="checkbox"/>
Jobsite Name	<input checked="" type="checkbox"/>
Jobsite Address	<input checked="" type="checkbox"/>
Jobsite Email	<input checked="" type="checkbox"/>
Jobsite Phone	<input checked="" type="checkbox"/>
Call First	<input checked="" type="checkbox"/>
Caller	<input checked="" type="checkbox"/>
Comments	<input checked="" type="checkbox"/>
Ad	<input checked="" type="checkbox"/>

**Call Taking - Service Order Form**

Service Order: [Search Icon] Call Taken By: [Field] Date: [Field] Time: [Field]

General | Billing | Invoice | Tech Log | Scheduling

Trouble: (None) Type: [Field]

Problem: [Field]

Jobsite: **\*Existing Jobsite\*** Update Jobsite [Icon]

Jobsite: [Field] Name: [Field] Address 1: [Field] Address 2: [Field] City: [Field] Region: [Field] Postal Code: [Field] Country: [Field] Email: [Field]

Service Order: [Field] Comments: [Field]

Ad: [Field] Terms: [Field] Price Level: [Field] Tax Group ID: [Field] Branch: [Field] Dept: [Field] Maint: [Field] PO: [Field] Own/Rent: [Field] Invoice: [Field] Sepic: [Field] Type: [Field]

Scheduling: Technician: (Unassigned) Status: [Field] Priority: [Field] Zone: [Field] Est. Hours: 0.00 Sch. Hours: 0.00 Prom Date: [Field] Prom Time: [Field] Scheduled: [Field]

Contacts: Call First: [Field] Caller: [Field]

# Ascente – System Tab Stop Maintenance

## Setup

These are the typical tab stop settings for the Call Taking form.

Tab Stops Maintenance

Login: fernando  
Group: Dispatch  
Form Name: Call Taking

Copy to Group

General	Tab Stop
Service Order	<input checked="" type="checkbox"/>
Input Date	<input checked="" type="checkbox"/>
Input Time	<input checked="" type="checkbox"/>
Call Taking Tabs	<input checked="" type="checkbox"/>
<b>General</b>	<input type="checkbox"/>
Trouble	<input checked="" type="checkbox"/>
Type	<input checked="" type="checkbox"/>
Problem	<input checked="" type="checkbox"/>
Jobsite	<input checked="" type="checkbox"/>
Jobsite Name	<input checked="" type="checkbox"/>
Jobsite Address	<input checked="" type="checkbox"/>
Jobsite Email	<input checked="" type="checkbox"/>
Jobsite Phone	<input checked="" type="checkbox"/>
Call First	<input checked="" type="checkbox"/>
Caller	<input checked="" type="checkbox"/>
Comments	<input checked="" type="checkbox"/>
Ad	<input checked="" type="checkbox"/>

7/5/2019 2:01 PM

Tab Stops Maintenance

Login: fernando  
Group: Dispatch  
Form Name: Call Taking

Copy to Group

General	Tab Stop
Service Order	<input checked="" type="checkbox"/>
Input Date	<input type="checkbox"/>
Input Time	<input type="checkbox"/>
Call Taking Tabs	<input checked="" type="checkbox"/>
<b>General</b>	<input type="checkbox"/>
Trouble	<input checked="" type="checkbox"/>
Type	<input type="checkbox"/>
Problem	<input checked="" type="checkbox"/>
Jobsite Address	<input checked="" type="checkbox"/>
Jobsite	<input type="checkbox"/>
Jobsite Name	<input checked="" type="checkbox"/>
Jobsite Email	<input checked="" type="checkbox"/>
Jobsite Phone	<input checked="" type="checkbox"/>
Call First	<input type="checkbox"/>
Caller	<input checked="" type="checkbox"/>
Comments	<input checked="" type="checkbox"/>
Ad	<input checked="" type="checkbox"/>

7/5/2019 2:11 PM



# Ascente – System Tab Stop Maintenance

## Setup

These are the typical tab stop settings for the Call Taking form.

Tab Stops Maintenance

Login: fernando  
Group: Dispatch  
Form Name: Call Taking

General

	Tab Stop
Service Order	<input checked="" type="checkbox"/>
Input Date	<input type="checkbox"/>
Input Time	<input type="checkbox"/>
Call Taking Tabs	<input checked="" type="checkbox"/>
<b>General</b>	<input type="checkbox"/>
Trouble	<input checked="" type="checkbox"/>
Type	<input type="checkbox"/>
Problem	<input checked="" type="checkbox"/>
Jobsite Address	<input checked="" type="checkbox"/>
Jobsite	<input type="checkbox"/>
Jobsite Name	<input checked="" type="checkbox"/>
Jobsite Email	<input checked="" type="checkbox"/>
Jobsite Phone	<input checked="" type="checkbox"/>
Call First	<input type="checkbox"/>
Caller	<input checked="" type="checkbox"/>
Comments	<input checked="" type="checkbox"/>
Ad	<input checked="" type="checkbox"/>

7/5/2019 2:11

Call Taking

Service Order: [Search] Call Taken By: [ ] Date: [ ] Time: [ ]

General | Billing | Invoice | Tech Log | Scheduling

Trouble: (None) Type: [ ]

Problem: [ ]

Jobsite: \*Existing Jobsite\* [ ] Update Jobsite [ ]

Jobsite: [ ] Name: [ ] Address 1: [ ] Address 2: [ ] City: [ ] Region: [ ] Postal Code: [ ] Country: [ ] Email: [ ]

Type	Phone Number	Extension	Contact
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Contacts: Call First: [ ] Caller: [ ]

Service Order: Comments: [ ] Ad: [ ] Terms: [ ] Price Level: [ ] Tax Group ID: [ ] Branch: [ ] Dept: [ ] Maint: [ ] PO: [ ] Own/Rent: [ ] Septic: [ ] Invoice: [ ] Type: [ ]

Scheduling: Technician: (Unassigned) Status: [ ] Priority: [ ] Zone: [ ] Est. Hours: 0.00 Sch. Hours: 0.00 Prom Date: [ ] Prom Time: [ ] Scheduled: [ ]

7/19/2019 1:00 PM

# Ascente – System Tab Stop Maintenance

## Conclusions

- Tab Stops will only work if your users use the [Tab] key to navigate between fields in Ascente.
- Tab Stops can be setup for a specific user or a group of users.
- Tab Stops are commonly used on the Call Taking form, but they can be setup for most forms in Ascente.
- Every user can use the [F3] Function Key to set and toggle a tab stop record for a specific form and for themselves only.
- When new users are setup, always setup their Tab Stops for the Call Taking program. This is a very common issue we see.



# Thank You!

We thank you for attending this webinar or watching this video and for choosing Ascente.

Please let us know if you have any questions or would like a follow-up call to discuss this in more detail.

More training videos like this are available on our website [www.compusource.com](http://www.compusource.com)

<http://www.servicecontractorsoftware.com/>

