

# ELECTRONIC SERVICE CONTROL

What's New in Version 12

# List of What's New in Version 12

- New Service Agreement Scheduling tab design makes scheduling much easier.
- Brand new List Views report capability that opens the door for new searching and reporting in ESC.
- Dispatch board customizable color coding is now possible using priorities.
- New Dashboard flow chart to help users understand how to use the software.
- New dispatch notifications capability that sends your customers an email with dispatch status changes.
- New vendor price comparing feature allows easy price checks to see which vendor has the best prices.
- All new SPIFF and Commission tracking capability and reporting.
- Customization of toolbars to add quick link buttons is now possible in ESC.
- New Inventory controls allow you to prevent parts from being sold if they are at a zero quantity.
- New credit card interface for Mobile Apps with Merchant Warehouse. (PCI Complaint)
- Updated look and functionality for the QuickBooks and Peachtree Connection Wizards.
- The ESC Sales Person field on invoices now associates and carries over to QuickBooks.
- Many other updates, mobile enhancement and tweaks to make the software even easier to use.

# Service Agreements Module

**Schedule Item**

Schedule Task Details

Task: 305 Filter change

**Recurrence Pattern**

☐ Daily ☐ Day 1 of every 1 month(s)

☐ Weekly ☒ The first Tuesday of every 3 month(s)

☐ Monthly ☐ Yearly

☐ Months ☐ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☐ Jul ☒ Aug ☐ Sep ☐ Oct ☐ Nov ☐ Dec

The first Tuesday of every 3 months

Next Service Date: 09/06/2011

Schedule Time:

The Schedule Tab of the Enter Service Agreements screen has been completely redesigned to use more of an Outlook style scheduling system.

This system is designed to make scheduling tasks faster and easier, while also providing more flexibility to the user.

This includes a calendar view that provides at-a-glance dates on which tasks are scheduled to occur.

+ Add New | Save | Clear | Delete | Activities | Edit Customer Information | Templates

Customer: Potter, Harry 0000062 | Location: 00001 Harry Potter | Agreement:

Harry Potter  
4 Pivot Drive  
Fort Myers FL 33907

Harry Potter  
4 Pivot Drive  
Fort Myers FL 33907

1 General | 2 Schedule | 3 Equipment | 4 Estimate | 5 Invoice | 6 Usage | 7 Documents

+ Add New Schedule Item | Modify Selected Item | Remove Item

Task	Next Service	Time	Recurrence
305 Filter change	9/6/2011		The first Tuesday of every 3 months

September 2011

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

# New List Views

Dashboard **Inventory Item List**

Select List: Inventory Item List

Search List For:

**Inventory Parts**

Item	Description	Quantity In Stock	Category	Subcategory
00000000	New Installation of 12 Seer AC Unit		HVAC	Systems
00000007	New Installation of 15 Seer AC Unit		HVAC	Systems
00000009	New Installation of 10 Seer AC Unit		HVAC	Systems
000001P	New 10 Seer AC Unit	12.00	HVAC	Systems
000002P	Switch Door (ge)	135.00	Electrical	Switches
000004P	Tcple 24"	109.00	Electrical	Misc
000005P	Tcple 48"	67.00	Electrical	Misc
000006P	Tcple 36"	72.00	Electrical	Capacitors
000011P	Auto Pilot Retrofit Kit	65.00	Electrical	Capacitors
000012P	Size Increaser Dw Pipe	71.00	Electrical	Misc
000013P	Collar Pipe 5" Dw	66.00	Electrical	Misc
000014P	Sail Switch	73.00	Electrical	Switches

**Filters**

Filter	From	To	Sort	Visible	Group	Total
Item			Ascending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Description				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quantity In Stock				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Item Type	Inventory			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Category				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Subcategory				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Average Cost				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Base Cost				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Price				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost Units				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buy Sell Ratio				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resale Units				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MarkupCode				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price A				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price B				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price C				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Price Book				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Jean's Test Company 8/5/2011 ADMIN

The new list views reports are available in each pull-down menu and from the tool bar and is intended to be the best starting point in searching for data.

Use the filters on the bottom half of this screen to customize your list view.

You can also create and memorize custom filtered lists that you want to reuse.

One of the best new features in ESC Version 12 is the introduction of list views. Lists views allow you to quickly find information that is important to you, such as newly added customers, recently completed dispatches and expiring agreements and more. All of this data can be completely customized so you only see what you want to see, in the order you want to see it. Better yet, once a list is displayed you can search it, print it, export it to Excel, drill down into the record and even mass print or email all the customers on the list.








# Color Coding of Dispatches

Have you ever wanted to have all of your Service Agreement dispatches stand out, when looking at your dispatch board? Do you need to have all of your high priority calls show red on your dispatch board? Would you like to have all your commercial customers show up in a shade of gray? Well Version 12 now incorporates this much requested feature.

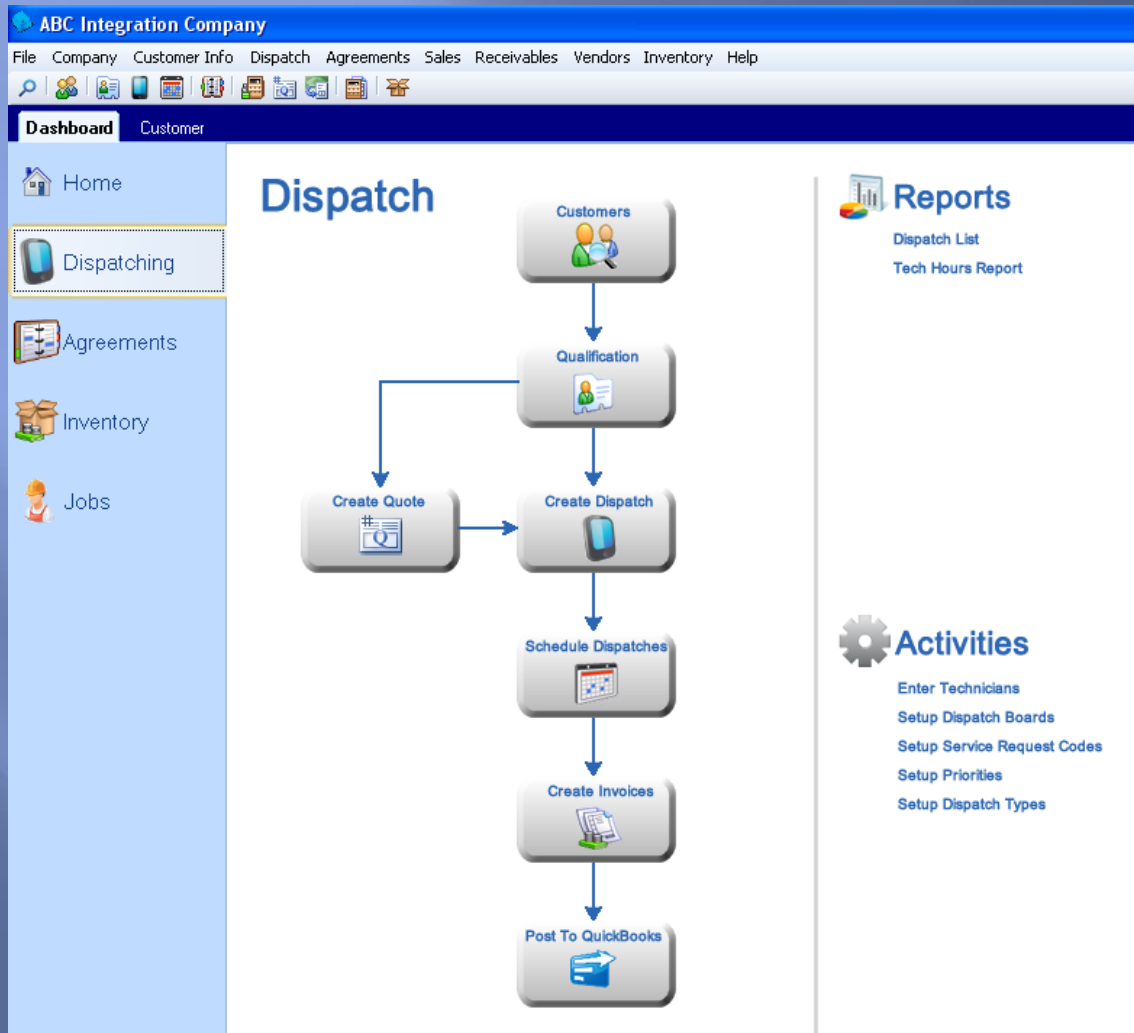
Active		Find	Exit
Chad	Jean	Nick	Corey
Tuesday 8/30/2011 Calls 1	Thursday 8/16/2011 Calls 1	Friday 8/12/2011 Calls 1	Friday 8/12/2011 Calls 1
Airflo 8 60	Jean Luc Picar 2 0	Access Printer 1 0	Jean Rodriguez 1 0
		Wednesday 8/31/2011 Calls 1	Tuesday 8/30/2011 Calls 1
		Creating For FU 8 60	Amber Bell 2 60
			Wednesday 8/31/2011 Calls 1
			Creating For FU 8 60
			Saturday 9/10/2011 Calls 1
			24/7 Technolog 3 0

One of the cool new features in version 12 is the ability to color code your dispatches. This is done by setting a color to each of your priorities. With the amount of colors the possibilities are almost limitless for setting up color coding.

To set this up you will need to choose the dispatch pull down menu and then choose Enter Priorities. This will show you a list of your current priorities, with the ability to edit and create new. When editing, or creating a new priority, you have a pull down menu to choose from a long list of different colors and shades.

Agreement	<input type="text"/>	Zone	<input type="text"/>
<a href="#">Priority</a>	QUOTE 	Date Received	08/12/2011
Received By	FOLLOW 	Time Received	11:48 AM
Customer PO	NORMAL 	Invoice	<input type="text"/>
<a href="#">Job</a>	PAID 		
	QUOTE 		
	SA 		
	URGENT 		

# New Dashboard Flow Charts



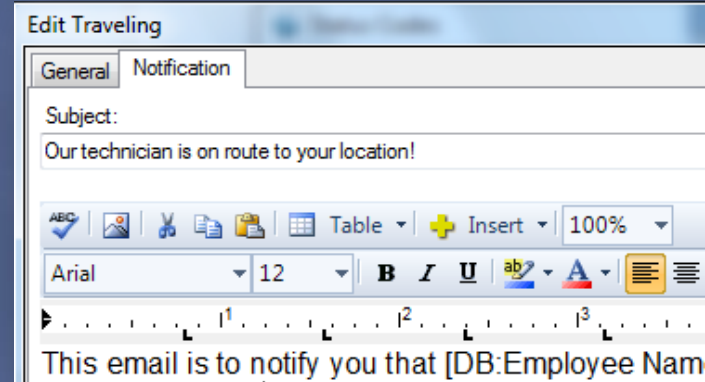
The new dashboard flow charts and reporting links will make it easy for new users to learn the flow of the ESC software as well as provide them with links to the most common reports and activities for each module of the software.

Experienced users will like this area of the program also since you can click on any box in the flow chart to take you directly to that particular screen.



# New Dispatch Email Notifications

You can now use ESC to send an email notification to your customers whenever a dispatch's status is changed and even customize the email message that they receive.



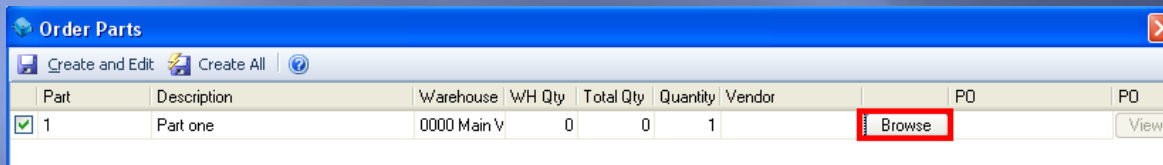
This new feature is easy to use but does require the installation of the ESC Connection Server software. If you are using one of the ESC mobile modules, you already have this software installed and can use this feature immediately. To quickly set it up:

1. Go into Dispatch | Enter Status Codes and determine which status codes you want to use.
2. Once you've decided on which status codes to use, double click on one of the status codes then click the Notification tab.
3. Enter a subject and body for the message. You can use the "Insert" button to insert merge codes into the body. The merge codes will automatically pull data from the database and fill it into the message when you send it.

# Vendor Price Comparing

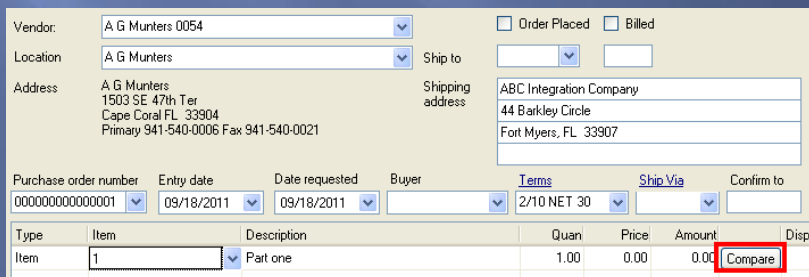
ESC now provides you with the ability to compare vendors when it is time to order inventory items.

When ordering parts directly from the Dispatch Entry screen you will see a Browse button: this will display comparative information so that you may choose which vendor your parts will be purchased from.



Part	Description	Warehouse	W/H Qty	Total Qty	Quantity	Vendor	PO	PO
1	Part one	0000 Main V	0	0	1		Browse	View

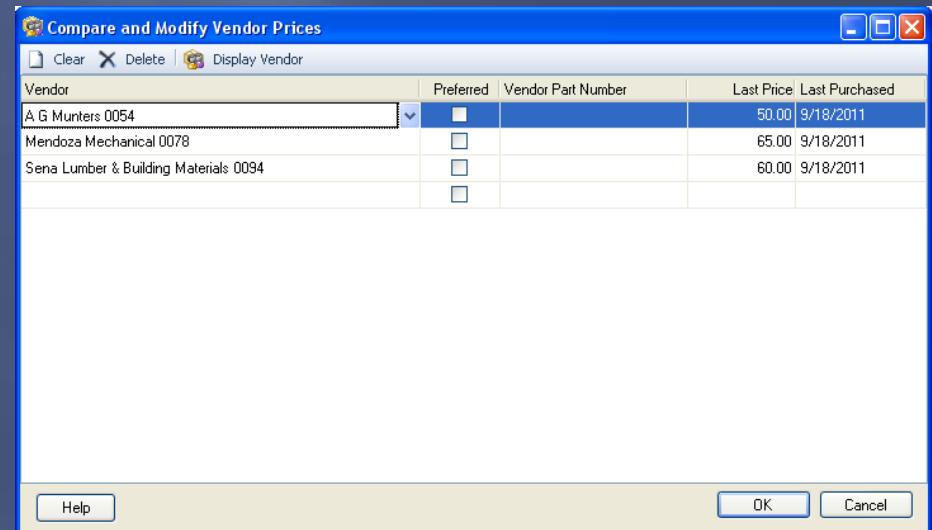
In the Purchase Order Entry screen, the compare button will also provide you with pricing information from your various vendors. This is a handy tool that can help to save you money.



Vendor: A G Munters 0054  
Location: A G Munters  
Address: A G Munters, 1503 SE 47th Ter, Cape Coral FL 33904, Primary 941-540-0006 Fax 941-540-0021

Purchase order number: 0000000000000001  
Entry date: 09/18/2011  
Date requested: 09/18/2011  
Buyer: [blank]  
Terms: 2/10 NET 30  
Ship Via: [blank]  
Confirm to: [blank]

Type	Item	Description	Quan	Price	Amount	Disps
	1	Part one	1.00	0.00	0.00	

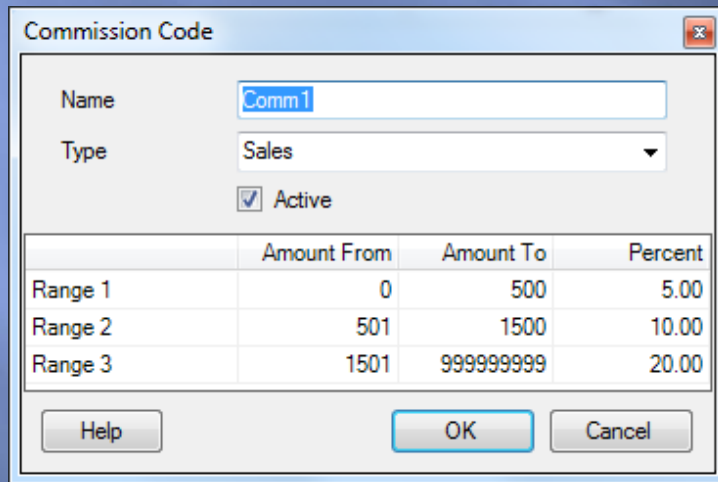


Vendor	Preferred	Vendor Part Number	Last Price	Last Purchased
A G Munters 0054	<input type="checkbox"/>		50.00	9/18/2011
Mendoza Mechanical 0078	<input type="checkbox"/>		65.00	9/18/2011
Sena Lumber & Building Materials 0094	<input type="checkbox"/>		60.00	9/18/2011



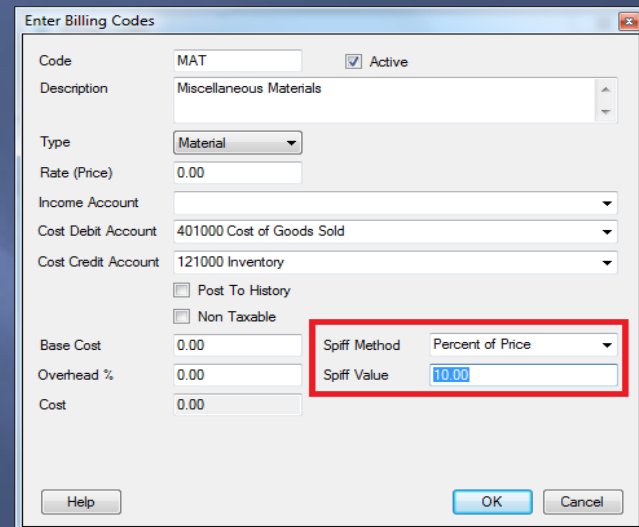
# Spiff/Commission Tracking

SPIFF tracking is done by assigning an amount or percentage to a part or billing code. Then, when these are used on sales invoices, the assigned sales person will get the spiff which can be tracked using the commission report.



The 'Commission Code' dialog box is used to create a new commission code. It features a 'Name' field with 'Comm1' entered, a 'Type' dropdown set to 'Sales', and an 'Active' checkbox that is checked. Below these fields is a table with three columns: 'Amount From', 'Amount To', and 'Percent'. The table contains three rows: 'Range 1' (0 to 500 at 5.00%), 'Range 2' (501 to 1500 at 10.00%), and 'Range 3' (1501 to 99999999 at 20.00%). At the bottom are 'Help', 'OK', and 'Cancel' buttons.

	Amount From	Amount To	Percent
Range 1	0	500	5.00
Range 2	501	1500	10.00
Range 3	1501	99999999	20.00

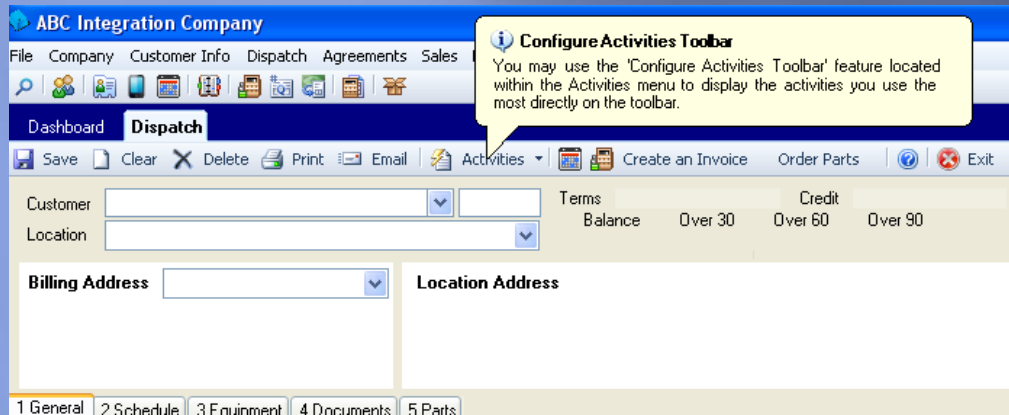


The 'Enter Billing Codes' dialog box is used to assign a commission code to a billing code. It shows 'Code' as 'MAT' and 'Description' as 'Miscellaneous Materials'. The 'Type' is 'Material' and the 'Rate (Price)' is '0.00'. Accounting accounts are listed: 'Income Account' (blank), 'Cost Debit Account' (401000 Cost of Goods Sold), and 'Cost Credit Account' (121000 Inventory). There are checkboxes for 'Post To History' and 'Non Taxable'. At the bottom, the 'Spiff Method' is set to 'Percent of Price' and the 'Spiff Value' is '10.00'. A red box highlights the 'Spiff Method' and 'Spiff Value' fields. 'Help', 'OK', and 'Cancel' buttons are at the bottom.

For commission tracking, create the commission code, assign it to your techs in the Enter Technician's screen and whenever they are assigned to an invoice, you will be able to run a commission report for them.

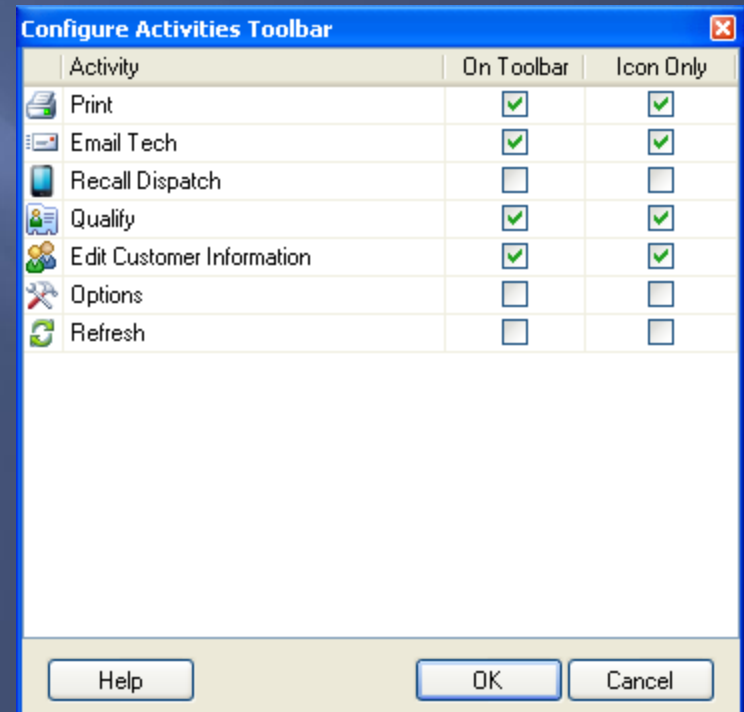
The commission report can be found under: Sales→Reports→Commission Report.

# Toolbar Customization



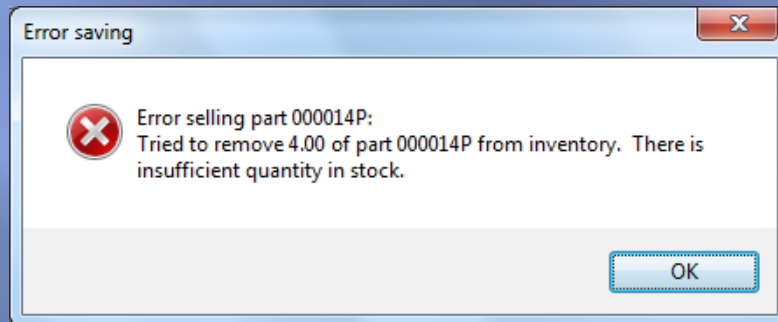
When you use ESC Version 12 for the first time, you will get the “Configure Activities Toolbar” prompt to remind you that you can customize the buttons that you see in the toolbar. The new configurable toolbar allows users to display additional buttons that they commonly use by either a small icon or with it’s full descriptive name.

Un-checking the “On Toolbar” checkbox will remove a button for further customization.

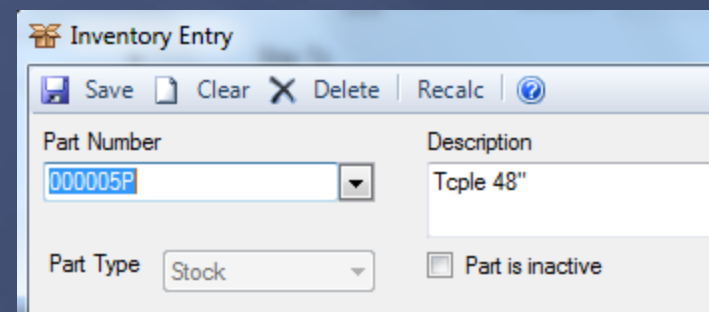
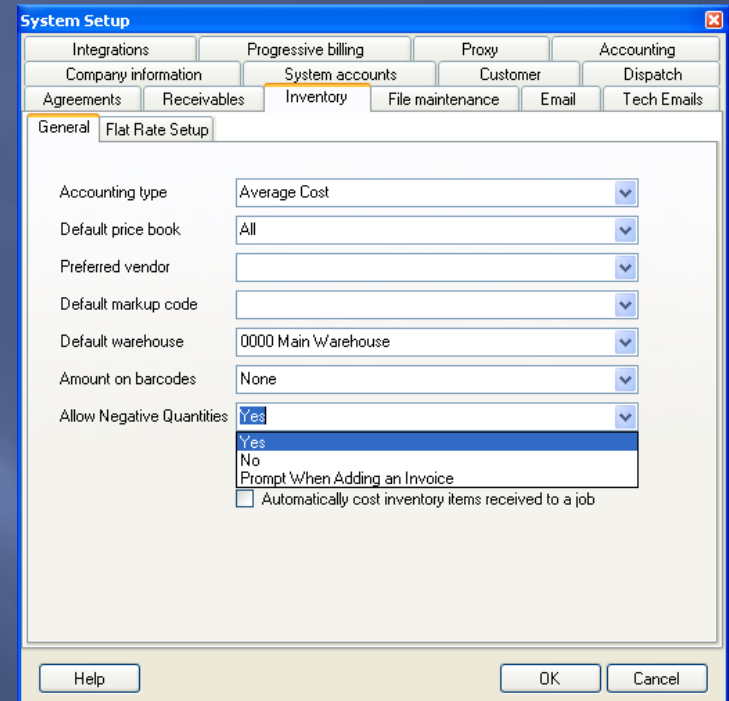


# Inventory Controls

ESC can now be configured to prevent the selling of inventory items if the quantity reaches zero. This prevents negative quantities in your inventory. To turn this feature on, go to Company→System Setup and click on the Inventory tab.



You can now change a part number to a different one! To do this, bring up the part in Inventory Entry and then overwrite the part number with the new one and then save the change.



# Customer Info

The screenshot shows the 'Customer Info' window with a menu bar (File, Company, Customer Info, Dispatch, Agreements, Sales, Receivables, Vendors, Inventory, Help) and a toolbar. The 'Customer' tab is active, showing a series of tabs: 1 General, 2 Locations, 3 Additional info, 4 Sort codes, 5 Documents, 6 Equipment, and 7 History. The '6 Equipment' tab is highlighted with a red box, and the '7 History' tab is highlighted with a pink box. A red arrow points from the '6 Equipment' tab to the text 'The “Enter Equipment” screen has now been moved to its own tab in the Customer Entry screen.' A pink arrow points from the '7 History' tab to the text 'The Manual Service History screen has also been moved to it’s own tab in the Customer Entry screen. By consolidating these 2 important screens into the customer entry screen, this will provide user with much easier access to data without having to switch to different module screens.'

Select Customer: Applebees 0000003 [v] 0000003 [v] ☒ Active

Company/Last Name: Applebees First Name: [ ]

Address 1: 4019 SE 20th Pl

Address 2: [ ]

City: Cape Coral State: FL Zip: 33904

Phone: [v] 941-540-2366 Mobile: [v] [ ]

Alt Phone: [v] [ ] Fax: [v] 941-540-2372

Terms: COD [v] ☐ Require Purchase Order

Credit Rating: [v]

Sales Sort Code: [v]

Sales Person: [v]

Price Code: A [v] Discount Percent: 0.00

Default Priority: [v] Late Charge Percent: 0.00

Credit Rating Legend:

Bad	Black
Good	Green
Overdue	Red

The “Enter Equipment” screen has now been moved to its own tab in the Customer Entry screen.

The Manual Service History screen has also been moved to it’s own tab in the Customer Entry screen. By consolidating these 2 important screens into the customer entry screen, this will provide user with much easier access to data without having to switch to different module screens.

The 'Enter Credit Rating' dialog box has a title bar with a close button. It contains the following fields and options:

Name: [Bad] [v]

Color: [Black] [v]

☐ Restrict Entering Dispatches

☒ Active

Buttons: Help, OK, Cancel

Credit ratings can now be color coded and used as an alert to prevent dispatches from being created for specific customers. Once assigned to a customer, the credit rating color coding will be visible within the Dispatch Entry and Qualifications screens. The best part about this feature is that you can prevent a dispatch from being created based upon specific credit ratings assigned to customers!

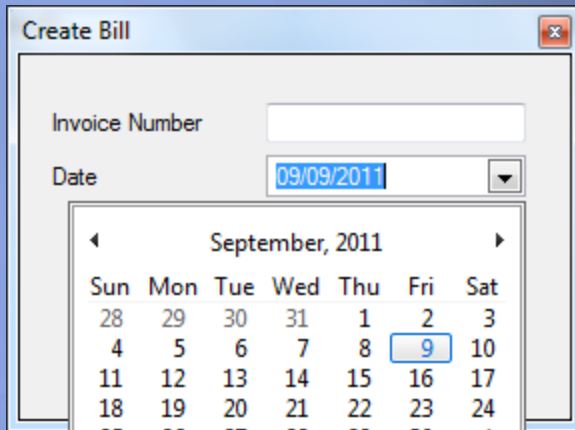
# SPLIT SCREEN VIEW

ESC now has the ability to divide the screen amongst various modules.

Click on the tab for that screen and drag it to the side of the program to divide your screen in two.

The screenshot illustrates the ESC software interface in a split-screen view. The top menu bar includes 'File', 'Company', 'Customer Info', and a sub-menu with 'Dashboard' and 'EDB'. Below this is a toolbar with icons for 'Save', a calendar, and 'Activities'. The main window is divided into two panes. The left pane shows a calendar view with columns for 'Unassigned', 'Serv Agr', 'Matt', 'Jake', 'Mike', and 'Chad', displaying dates and call counts. The right pane shows a form for 'Agreement' with fields for 'Customer' (Coughlin, Michael), 'Location' (00001 Air Care Systems), and various contract details like 'Type', 'Department', 'Sales Person', 'Technician', and 'Job'. The bottom of the right pane has tabs for 'Notes', 'Date/Time Stamp', and 'Spell Check'.

# Purchase Orders



Create Bill

Invoice Number

Date

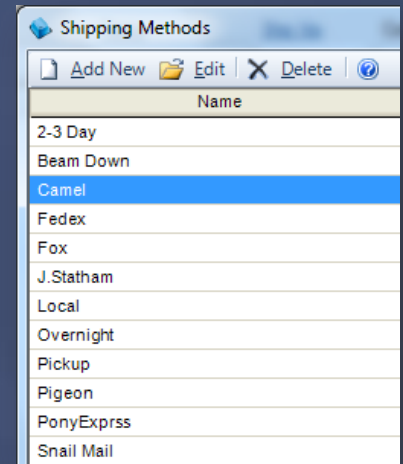
September, 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

The date of Accounts Payable bills can now be changed when posting to QuickBooks or PeachTree.

You may now add additional shipping methods for purchase orders. Go to:

Vendor → Enter Shipping Methods.



Shipping Methods

Add New Edit Delete

Name
2-3 Day
Beam Down
Camel
Fedex
Fox
J.Statham
Local
Overnight
Pickup
Pigeon
PonyExpress
Snail Mail



You can no longer delete a purchase order once items have been received from it. This prevents accidental deletions of active purchase orders.



# Service Agreements

- You must now click on the “Add New” button in order to enter a new Service Agreement. The agreement will be assigned a number from the new agreement counter, which can be found and set in Company | System Setup | Agreements. You can also add your own number if needed.
- A new feature labeled “Order Parts for Posted Dispatches” – found under the Agreements menu – generates a list in the Order Parts screen for all inventory parts posted to dispatches from the Service Agreements module.

Customer: Potter, Harry 0000062 | 0000062 | Location: 00001 Harry Potter | Agreement: 000

Harry Potter  
4 Pivot Drive  
Fort Myers FL 33907

Harry Potter  
4 Pivot Drive  
Fort Myers FL 33907

1 General | 2 Schedule | 3 Equipment | 4 Estimate | 5 Invoice | 6 Usage | 7 Documents

Fill Invoice Schedule ▾

Month to Post	Item	Description	Quantity	Price	Amount	Print
On Dispatch ▾	SA	Billing Monthly Agreement For	1.00	50.00	50.00	<input checked="" type="checkbox"/>

**Billing Address** ▾  
Harry Potter  
4 Pivot Drive  
Fort Myers FL 33907

**Location Address**  
Harry Potter  
4 Pivot Drive  
Fort Myers FL 33907

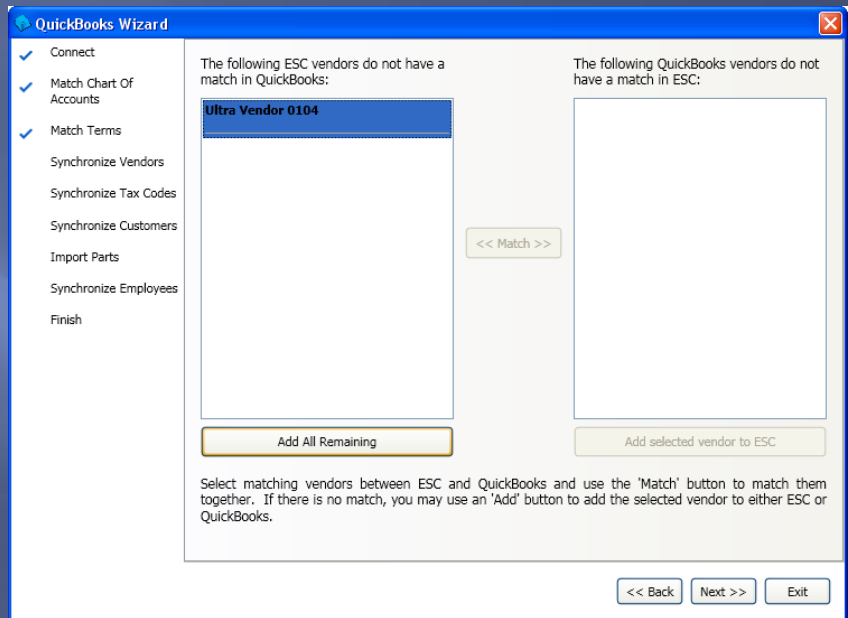
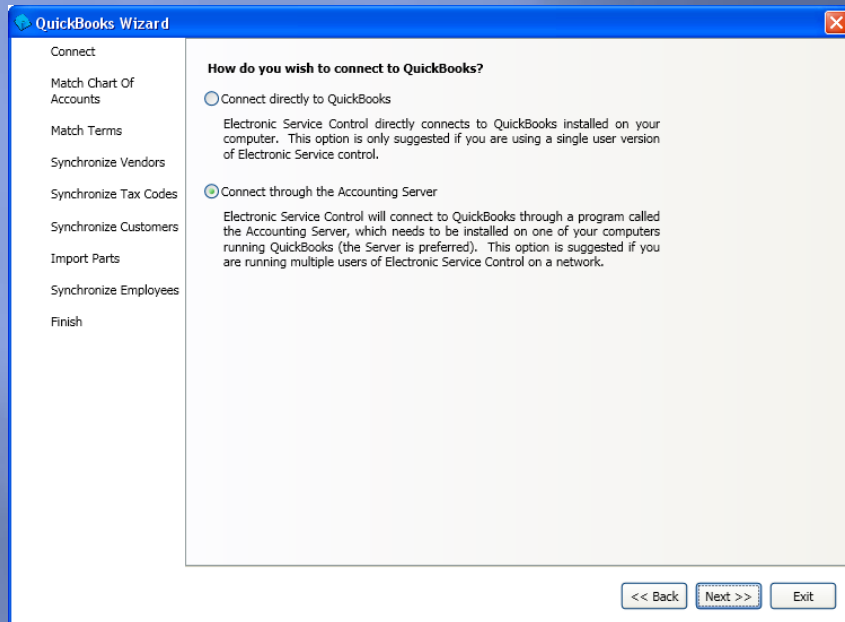
1 General | 2 Schedule | 3 Equipment | 4 Documents | 5 Parts

Warehouse	Quantity	Item	Price	Description
0000 Main Warehouse	1.00	SA	50.00	Billing Monthly Agreement For

In the Invoice Tab, the “With Dispatch” option is now called “On Dispatch” in the Month to Post column.

Now the invoice items will be added to the dispatch, so that you may create an invoice that encompasses the agreement items and any other items/costs accumulated on that dispatch.

# Updated QuickBooks/Peachtree Wizards



Redesigned integration wizards screens now also have the ability to add remaining records when once side has been completely matched up. This eliminates having to manually add each record one at a time. This feature is built into Vendors Customers and employees integration screens.

# Customer Email Task Control

Dashboard Customer EDB Invoice

+ Add New Customer Save Clear Delete Activities Create a Dispatch Create a Quote Exit

1 General 2 Locations 3 Additional info 4 Sort codes 5 Documents 6 Equipment 7 History

Select Location: 00001 Abe's Lock & Key [Add New Location] [Delete Location]

Location Name: Abe's Lock & Key Number: 00001 [Active]

Address 1: 4104 SW 6th Ave

Address 2:

City: Cape Coral State: FL Zip: 33914 Zone:

Tax Code: FL Sales Tax Trip Charge: 25.00 [Disable Mass Emailings]

Labor Rate: Standard Sales Reference: [Receives Email Notifications]

Primary	Contact Name	Email Address	Email Tasks	Phone	Extension	Salutation	Job title
<input checked="" type="checkbox"/>	Abraham J. Williams		[All General Billing]	941-549-0196			
<input type="checkbox"/>	Phone						
<input type="checkbox"/>	Mobile						
<input type="checkbox"/>	Alt Phone						
<input type="checkbox"/>	Fax						

Notes [Date/Time Stamp] [Spell Check]

We added the ability to delegate tasks to specific emails on a customer location basis. From within the location tab, you can select for each email address how you want to handle their email tasks:

- Blank: No emails will be sent to this contact.
- All: Emails in from every module will be sent to this contact.
- General: Emails from non-financial modules will be sent to this contact like mail merges.
- Billing: Emails from financial modules (sales, statements, etc.) will be sent to this contact.

# Electronic Dispatching

- It is now possible to assign an unlimited number of technicians to the dispatch boards.
- The Dispatch Schedule Report has been moved from Dispatch | Reports to just the Dispatch menu; it is now called “Search for Dispatch”.
- The 7-day dispatch view now only displays 7 days back or forward. This improves the loading time of this display.
- It is now possible to make Travel Time billable in ESC. This can be done through System Setup | Dispatch. This option affects the ‘Reg Hours’ value in Sales Invoicing.
- New .Net Framework coding allows the dispatch board to improved features.

# Sales and Accounting Updates

- Added a new report under Sales called Sales Item Summary. This report will give you a count of how many inventory parts, billing codes or history codes were sold in a specific date range.
- Added a “Reason Rejected” field to the Quotes screen that only appears if the quote is rejected.
- A new “QuickBooks Sales Rep” field will appear in Enter Technicians if QuickBooks is enabled. If you manually enter the Sales Reps initials from QuickBooks into this field, then the Sales Person field will then carry over with the invoice information.
- You can now enter multiple line deposits. Go to Banking→Account Register→New→Deposit. *(ESC Accounting Module Only)*
- You can also backload data from any screen into a specific period without affecting financials. This is enabled in Company→System Setup→Accounting→“Select Backload Period”. *(ESC Accounting Module Only)*

# Miscellaneous Updates

- ESC is now capable of accepting credit cards through Merchant Warehouse – integration is configured in Company | System Setup | Integrations. You must first sign up with Merchant Warehouse to be able to use this capability.
- Preferred Vendor has been moved from the Manufacturer tab, to the Vendor tab.
- Job Names can be changed in ESC. Note: If you are integrated with QuickBooks or Peachtree, you must update the job name there manually.
- You can now attach document to employees.
- The ESC navigation pane has been redesigned and can now be reached from only the Dashboard.
- The Sales Trend panel of the Dashboard now shows the last 12 months of sales revenue instead of the calendar year.



# ESC Mobile Updates

- New “Manage Tech” feature that allows you to view other tech’s calls and reassign them as long as they haven’t been synced to mobile and are in “Pending” status.
- You can now view basic customer information without creating a dispatch. The hardware “back” button on Android devices can now be used for navigation rather than using the Back button on the screen.
- Added Merchant Warehouse integration for credit card authorizations. You can get credit card readers on Android and iPhone/iPad.
- The mobile apps now enforce ESC security on editing/viewing attached documents. If an ESC user does not have the permission to “Edit Attached Documents” in ESC then they will not be able to view the documents in the mobile apps.
- Color coding on dispatches (based on priorities) is visible on the mobile app.
- Edit equipment – including custom fields. Changes appear in ESC when dispatch is completed. Editing a piece of equipment automatically attaches it to the dispatch.
- Labor hours that a tech accumulates now shows on the mobile app.
- It is possible to block techs from changing their times from the connection server settings.

# Discontinued Items

- We can only integrate ESC with QuickBooks 2008 and higher versions.
- We can only integrate ESC with Peachtree 2011 and 2012.
- We can only integrate ESC with MapPoint 2009 – 2012.
- The Windows 6.5 Mobile PDA Client will not be supported in version 12.
- The ESC Mobile Web browser based module has been discontinued in version 12.
- The Xora Mobile integration is no longer supported in version 12.