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# Total Activity Control Features A-Z

## Billing / Invoicing

- Customizable current and overdue (30/60/90 day) watermark messages

## Billing Units

- Expanded unit billing options
- Customer Records Management
- Enhanced Site and Customer Information Recap
- Last three year quantity and sales
- Default price
- Days to pay
- Post Pay and email an invoice
- Bulk email invoices and or statements
- Send multiple attachments for any email
- Align all prices for units on a site/customer of the same type
- Sales tax expanded to 10 categories
- Added analysis report to track how fast a customer pays their invoices

## Centralized Reporting

- Independent of Data Location
- Supports Fully Distributed Operations
- Complete View of Company Financials

## Credit Card

- Bulk Pay open invoices for a customer/sites
- Bulk pay invoice range of invoices
- Post invoice receipt of payment on invoice

## Customer Records Management

- Assign a rate code when adding a site based upon service address zip code
- Display maps from F4 and F5 dispatch management forms
- Re-occurring billing expanded from 5 to 10 categories
- Collection note added to customer master that shows all age reports
- When converting a proposal, will keep the same invoice number
- Surcharge descriptions from reference file 91 can be multi line

## Customizable Grids Displays

- Drag and drop grouping
- Even/odd row coloring (easier to read when you have more then one entry)
- Individual setting of grids (user can define there own grid lay out or can be locked.)
- Display full note text, not just for first line
- Export any grid to excel to create customer reports
- Hide unneeded columns
- Customize columns the way you want to view them

## Customizable Form Displays (Grids)

- Drag and drop grouping
- Set heading color and even/odd row coloring by individual user

- Faster refresh rates
- Print grids in sorted or grouped order
- Display full note text, not just for first line
- Hide unneeded columns
- Tool Bars on forms can be customized to display commonly-used actions.
- Easy exit out of search forms using a right click or tool bar exit option.
- Forms remember size and location from last use.
- Window List (F10) now shows status (edit, search, normal) of all open windows and forms.
- Site history now displays 50 last sites viewed.
- Select which tabs to display on site master
- Choose Your Own Color Scheme

## **Database**

- SQL 2005 and 2008 Fully Supported
- Copy a single division from a multi-division database

## **Dispatch**

- Works with integrated Maps
- Limit columns in dispatch board to selected routes
- Site map can be display from F4 and F5 dispatching grids

## **Dispatch board Service Stops (F5)**

- Service Stops Dispatch Board (F5) displays financial data (total due, current balance, 30, 60, 90, credit limit) and unit count. This information can be suppressed by setting invoice access for user to none.

## **Email:**

- Email to your drivers so they do not have to keep requesting address over and over
- Email invoice or statement right from the site master.
- Soft ware remembers users email address
- Can store drivers email address for ease
- Bulk emailing has improved email statistics and supports access to all four email addresses
- Confirmation has been added and the ability to email invoice, statements and ledgers from site expanded

## **Financial Reporting**

- Option to include or exclude tax in gross sales in financial reports
- Snap shot aging does both invoice-based and accounting-based aging

## **Fuel Tickets**

- When printing a fuel ticket, the status field is updated with a date time stamp.

## **Graphical Dispatch**

- Vehicle Loading Tool for work orders
- Service Route Creation Tool

## **GPS**

- Insight - you can now specify radius distance to tell when at a service stop
- Garmin Updates
  - Points of interest
  - Fixed service routes
  - Updates Sent to Vehicle from Office

## **GPS with Fleet Management**

### **Invoice Adjustments**

- All credit invoices and then allows you to transfer the balance either one site at a time or in bulk.

### **Inventory(unit) availability**

- Work order types can now be set to increase or decrease inventory for unit availability reporting. This is a great feature for handling borrowing and lending of units to friendly competitors.
- Now sensitive to work order schedule/ invoiced dates

### **Mapping**

- Write-on maps
- Print commented map on work orders
- Map templates active on all stations (centralized)

### **Notes**

- Popup notes
  - From-site and customer are prefixed to tell which kind of note.
  - If a site has any popup notes, they now show up when posting individual receivables.
- Set a note to off/on so you can save
- Popup Notes Searching

### **Profit Reporting**

- Snap-shot report supplies before-tax gross profit for selected operational day

### **Proposals**

- All details of final invoice
- Switch proposal to invoice with no additional entry
- Re-use existing invoice as template for proposals

### **Post, Pay & Print Invoices**

- One step post invoice, pay and print or email in one continues operation

### **Pricing – Setting price when assigning units**

- Three-tier price structure supports rate changes at different quantity levels.
- Volume based pricing. Set price based upon quantity used up to 10 level
- Same as unit on site
- Same as unit on any customer site

- Manual override

## **Receivables**

- Accept payment by check or credit card on line
- Post adjustment, credits from receivables forms
- Invoice Search expanded to include current balances, list credit invoices
- Posting warns you if any site or customer credit invoices exist

## **Sales Reporting**

- Updated current to actual sales for year, month, quarter for each site
- 50+ report for reporting sales activity
- Information button reports on last three years of sales activity

## **Screens and Forms:**

- Window List (F10) shows status (edit, search, normal) of all open windows and forms (Have more than one screen up at a time)
- Navigate between screens easy
- Tool Bars on forms can be customized to display commonly-used actions.
- Select which tabs to display on site master
- Select fields in the work order to display
- Easy exit out of search forms using a right click or tool bar exit option.
- Forms remember size and location from last use.

## **Search customer records**

- Includes contact and phone numbers
- Option to match left sided search
- Expanded to include all email addresses

## **Security Logging**

- Log file for transactions (site, customer, invoice, payments, notes, service stops, rental)
- Deletion of a charge now logs the date, code, rate, quantity, amount and note
- Deletion of a payment now logs the payment details

## **Service Routes**

- Service route sheet #12 has each driver form start at a new page to be placed on top
- Service stops now have their own service interval
- Route Book Service Route Report (18) includes site and equipment maps
- Service route #11 now prints the route stop service interval
- Site inventory details can be displayed from F5
- Service stop interval now supported at stop level in addition to unit level

## **Standing Orders**

- Search expanded to include type of interval and number of intervals
- Recommend tool added to standing order form. Picks nearest existing standing orders
- Generation on standing order allow creation of work order with no date advancement

## **Reports**

- Select order, user comment, colors, number and much more

- Option to include or exclude tax in gross sales in financial reports
- Snap shot aging does both invoice based and accounting - based aging
- Over 450 reports to keep you informed of your business activities

## **Record Management**

- Set up a note for a future reminder to call a customer
- Change the initials on a note to remind a co-worker to call a customer.
- Work orders and invoices printed from any grid location, can be sent directly to the printer without viewing.
- Search in F7 Expanded to include all email addresses
- Map templates on site master for write on mapping.
- Caller ID quick and easy location of a customer (Hard ware required)

## **Receivables and Invoicing:**

- Price book template that defines your prices for high speed rental unit assigning.
- Credit card processing (A single entry posts credit card and updates files)
- Multiple Invoices credit card processing
- Bulk Posting of Receivables Now support a 10 character batch code and allow manual entry of amount on an individual invoice.0
- Line item charges can be created as proposals.
- If a site has any popup notes, they now show up when posting individual receivables.
- New tab on invoice adjustment form. Retrieves all credit invoices and then allows you to transfer the balance either one site at a time or in bulk.
- Customizable current and overdue (30/60/90 day) watermark messages on invoices
- Post invoice receipt of payment on invoice
- Last three year quantity and sales
- Days to pay
- Post ,Pay and email an invoice
- Bulk email Invoices and or statements
- Define which rate code not to apply surcharges
- Analysis report to track how fast a customers their invoices

## **Routing/Mapping:**

- Send any route to your Garmin or Tom Tom (call for specific models)
- Now supports the option to use both lines of the address for locating an address.
- Service Stops Dispatch Board (F5) now displays financial data (total due, current balance, 30, 60, 90, credit limit) and unit count. This information can be suppressed by setting invoice access for user to none.
- Write-on maps

## **Security Logging and Security options:**

- Greater user defining (none, read only, read write or full)
- Log file for transactions (site, customer, invoice, payments, notes, service stops, rental)
- Deletion of a charge now logs the date, code, rate, quantity, amount and note
- Deletion of a payment now logs the payment details

## **Service Route Notification**

- Put work order notifications right on your drivers' service routes

## **Vendor Selection for Brokering Services**

- Select vendors by type and distance from service location.

## **Write Your Own Reports**

- Using the industry-leader in individual report generation Access

## **Work Orders**

- Bulk convert work order that used override rate & rate code with step set =1 & rate2=0, sets pretax amount to amount on work order.
- Duplicate work order feature now updates entered date, time and clerk
- Financial Sales Report # 90 Snapshot of business activity
- Easy Duplication of Work

## **Work Order Dispatch Board – F4**

- Edit key fields directly
- Tools
- Mapping
- Drag and Drop Work Orders to Calendar
- Multi-view and Customizable
- Interval Times Set by Type of Work Order
- Color-Coded Work Order Status
- Drag-n-Drop Dispatch Center with route optimizer/planner.
- Move stops around, recalculate directions and update fields so all reports come out in modified order.
- Change starting and ending point for individual routes to a different divisional location without changing individual division codes for sites on the route.
- Set the minimum stop time when using route optimizing tools.
- Drag and drop route arrangement.