


- [F1] Display Online Help
- [F2] Start a Lookup (*equivalent to clicking on the lookup button*)
- [F3] Set a tab stop
- [F4] Display the Drop-Down List
- [F5] Refresh Dropdown Lists
- [F6] Open file maintenance program for the field the cursor is in

In any field with a blue lookup button , you can enter lookup text started by the “%” symbol to look for the specific text anywhere in the field. For example you can enter %Main” in the address field and then hit the [F2] key to look for all addresses with the text “Main” in the street name. This is used a lot for part or name lookups.

Common Buttons and Keyboard Shortcuts



Lookup existing service orders. [F2]



Add a new service order



Anytime you see this blue-lookup button, you have additional [F2] lookup functions. You can for example enter %MAIN in the address field and it will select all addresses with the characters “MAIN” anywhere in the address field.



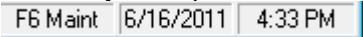
Change the lookup type by right-clicking to search by jobsite or jobsite phone number.

[F3] Set the tab stop flag for a field. This will determine if the cursor stops in that field.

[F4] The [F4] function key is equivalent to clicking on the drop-down arrow when you are in a field that has a drop-down. This is much faster than reaching for the mouse.



Refresh all of the data and dropdown lists [F5]

[F6] The [F6] function key will open the file maintenance program for the field that the cursor is in when ‘F6 Maint’ is displayed on the bottom-right of the form. 



Other Service Orders: Indicates and displays a listing of other current service orders for this jobsite. If there are no other service orders for the jobsite this button is disabled.



Existing Work Orders: opens a selection list of current work orders for this jobsite. Selecting a work order opens Work Order Entry with the selected work order loaded. If there are no work orders assigned to the service order this button is disabled.



Maintenance Contracts: a green flag indicates there are active maintenance contracts. A red flag indicates there are expired contracts. In either case this will display all contracts assigned to the jobsite. If there are no contracts the button is disabled.



Components: displays a list of components (equipment) installed at the jobsite. If there are no components assigned to the jobsite this button is disabled.



Billing Status: checks all work orders for the current service order to see if they are complete and ready to bill.



Service History: displays a list of all service orders in history for the current jobsite. The button is disabled if there are no history records for the jobsite.



AR Customer Inquiry: displays the AR Customer Inquiry Screen, listing all open invoices. The indicator on the button alerts the user as to the current billing status of the customer. One of three indicators will be displayed for a customer:

1. **Green** – current, not past credit limit.
2. **Yellow** – past due invoice.
3. **Red** – over credit limit.
4. **Black** - credit hold

Call Taking Screen – Button Definitions

The buttons on the top-left side of the screen are common throughout Ascente.

