

Ascente 4.0 Enhancements/Fixes

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SPECIAL NOTES:

Ascente 4.0.x requires a server running Windows 2003 or greater. Windows 2000 is no longer supported.

Ascente 4.0.x requires SQL 2008 or SQL 2008 R2.

Ascente 4.0.x requires that Traverse 11 be installed first, which requires Traverse to be at the 10.5 SP3 level prior to upgrade.

Ascente 4.0.x requires that Ascente 3.7.9 be installed first.

Due to the way Traverse stores the Item Pictures, these cannot be converted to the Ascente inventory. After updating to the new version, the pictures will need to be set up in Ascente.

Due to the redesign of the Traverse Digital Dashboard, the Ascente and any custom Dashboard views are not available in Traverse 11 at this time.

All custom Reports, Triggers, Stored Procedures and Info Alerts will need to be reviewed and may need to be rewritten or adjusted to work with the new Ascente & Traverse. Block time will need to be purchased for this project.

Open Systems, the makers of Traverse, have dropped support for the Traverse 10.5 Payroll system; therefore, upgrade priority will be given to those customers who use the Traverse Payroll system to print payroll checks.

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Many new menu items have been added to the system. Users flagged as Administrators will have access to these, but all other users will not. If you want a user to be able to run a new item, you will need to go into System Manager, Maintenance, User, view the user, go to the Security tab and check off those items you would like them to access. Here is a list of the new menu selections:

<u>Menu</u>	<u>Sub-menu</u>	<u>Item</u>	
<i>Inventory</i>	<i>Transactions</i>	<i>Inventory Transaction</i>	
		<i>Inventory to Job</i>	
	<i>Journals</i>	<i>Inventory to Job</i>	
		<i>Price and Cost Update</i>	
	<i>Periodic</i>	<i>Maintenance</i>	<i>Options & Interfaces (Inventory)</i>
			<i>Forecast Type</i>
			<i>GL Account Code</i>
			<i>Location</i>
			<i>Part</i>
			<i>Part Alias</i>
			<i>Part Bill of Material</i>
			<i>Part Grouping</i>
			<i>Part Location</i>
			<i>Part Picture</i>
			<i>Price Break</i>
			<i>Price Level</i>
			<i>Price Override</i>
<i>Product Line</i>			
<i>Unit of Measure</i>			
	<i>Inventory Reports</i>		
	<i>Reports</i>		
<i>Mobile</i>	<i>Maintenance</i>	<i>Options & Interfaces (Mobile Server)</i>	
		<i>Options & Interfaces (Mobile Client)</i>	
		<i>Pay Code Price Level</i>	
		<i>Resolution</i>	
		<i>Resolution Grouping</i>	

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<u>Menu</u>	<u>Sub-menu</u>	<u>Item</u>		
<i>Payroll</i>	<i>Transactions</i>	<i>Timecard</i>		
		<i>Timecard Register</i>		
	<i>Journals</i>	<i>Void Check Timecard Register</i>		
		<i>Techlog Timecard Update</i>		
		<i>Maintenance</i>	<i>Allocation Method</i>	
			<i>Employee</i>	
			<i>Employee Earnings Markup</i>	
			<i>Labor Grade</i>	
			<i>Pay Code</i>	
			<i>Pay Code Price Level</i>	
			<i>Payroll Distribution</i>	
			<i>Prevailing Wage</i>	
			<i>Technician</i>	
			<i>Union</i>	
			<i>Union Calculation</i>	
			<i>Worker Compensation</i>	
			<i>Reports</i>	<i>Payroll Reports</i>
<i>Payroll Trends</i>				
<i>Union Report</i>				
<i>Certified Payroll</i>				
	<i>Technician Commission</i>			
<i>Purchase Order</i>	<i>Transactions</i>	<i>Purchase Order</i>		
		<i>A/P Invoice</i>		
	<i>Journals</i>	<i>A/P Register</i>		
		<i>Move PO's to History</i>		
		<i>Periodic</i>	<i>Branch</i>	
			<i>Unit of Measure</i>	
			<i>Maintenance</i>	<i>A/P Vendor Inquiry</i>
				<i>Purchase Order Print</i>
				<i>Purchasing Reports</i>
<i>Service Dispatch</i>	<i>Journals</i>	<i>Techlog Timecard Update</i>		
<i>System</i>	<i>Maintenance</i>	<i>Cell Carrier</i>		
		<i>Email Account</i>		
<i>Web Portal</i>	<i>Maintenance</i>	<i>Web Portal User</i>		

Ascente 4.0 Enhancements/Fixes

Enhancements

General

- On-line Help (F1) has been updated to include all of the features described in this document.
- CreateViews.sql script has been adjusted for the following:
 - Adjusted to recreate the standard views using the new data structures and to also create the new views needed for standard file maintenance listing reports.
 - Adjusted the CreateViews.sql script to create a new AscenteUpdate_sp stored procedure that replaces the Ascente/Setup/Custom.sql script. The AscenteRev4.x.sql script now calls this stored procedure as the last part of the installation. Any custom updates that need to be done need to be added to this new stored procedure.
 - Adjusted all views to use NOLOCK to prevent deadlocking.
 - Added the following new views:
 - GL_JournalDetail_View
 - GL_JournalSummary_View
- Favorites – Custom Favorites items can now be set up to have parameters passed.
- User Account Control (UAC) - No longer requires User Account Control (UAC) to be set to the lowest level.
- Part Lookups throughout the system now search on Part Number, Part Description and Product Line.

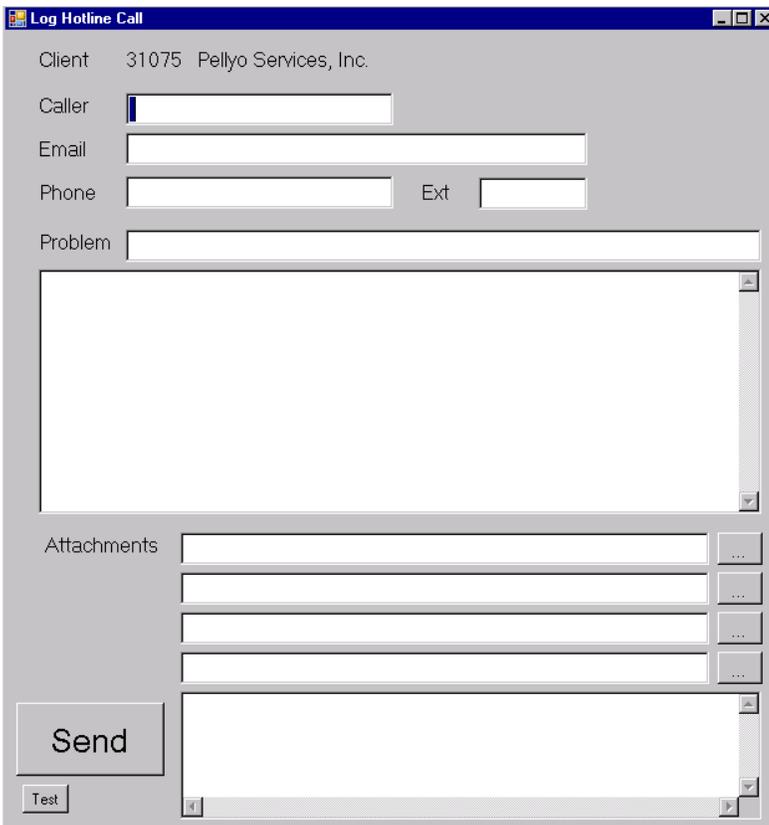
Ascente 4.0 Enhancements/Fixes

Add a Hotline call directly from Ascente – New Feature

The Help, option from the Toolbar has a new option call Support Call that will allow you to directly log a Hotline call regarding any topic (Ascente, Traverse or other).



After selecting the Support Call option the following screen will be displayed, but with your Client # and name.

A screenshot of a 'Log Hotline Call' window. The window title is 'Log Hotline Call'. It contains a form with the following fields: 'Client' (pre-filled with '31075 Pellyo Services, Inc.'), 'Caller' (empty text box), 'Email' (empty text box), 'Phone' (empty text box) and 'Ext' (empty text box), and 'Problem' (empty text box). Below these is a large empty text area for notes. At the bottom, there are 'Attachments' (four empty text boxes with browse buttons), a 'Send' button, and a 'Test' button.

Fill in the form and click the Send button to create a Hotline call regarding any topic. Your call will be placed directly into the Hotline queue. This does require an active internet connection.

NOTE: This option should NOT be used for emergency items, such as not being able to process payroll. In this type of situation a call should be placed directly to Hotline to insure proper processing.

AscenteSetup Installation Program

The installer will only run if Ascente 3.7.9 and Traverse 11 are currently installed. If running on a prior version of Ascente you will first have to upgrade to Ascente 3.7.9.

Ascente 4.0 Enhancements/Fixes

Flat Rate – Kimmons import

The Flat Rate module was updated to support the new Kimmons file format. In addition, the Preliminary Flat Rate Import Bill of Materials was changed to allow the entry of a starting position for use with non-standard file formats.

Flat Rate, Periodic, Flat Rate Task Update

The update now checks the new Material Margin Percent in the Inventory Options. If this is set to zero, the system will use the regular material sell price when calculating the Flat Rate price. If the Material Margin Percent is not zero, the system will use the marked up material value based on the Margin.

Inventory Module – New Feature

A new Inventory module has been added to Ascente. Upon installation your existing Traverse Inventory will be imported into this new module. Some key features that this affords are:

- Items are now referred to as Parts throughout the system
- Can change Part ID's
- Can change Location ID's
- Location ID's can be up to 20 characters (was 10 in Traverse)
- Product Line ID's can be up to 50 characters (was 12 in Traverse)
- Price/Cost information for Parts are stored at the Part level instead of the Part Location level, which greatly simplifies price/cost updates.
- The Pricing menu has been merged into the new Inventory Menu, since pricing is a function of Inventory.
- The Pricing scheme has been adjusted to match how Mobile Pro works and eliminates the Customer Level/Promotional Pricing options.
- Can define a separate costing method for Bill of Material Tasks
- Can flag Parts to automatically create a Jobsite Component when the part is billed on a Work Order.
- Tax and GL accounts are now defined at the Product Line level instead of the Part level

The menu options available are;

Transactions	Inventory Transaction (Transfers, Adjustments, etc) Inventory to Job
Journals	Inventory to Job
Periodic	Price and Cost Update
Maintenance	Options & Interfaces (Inventory) Forecast Type GL Account Code Location Part Part Alias Part Bill of Material Part Grouping Part Location Part Picture Price Break Price Level Price Override Product Line Unit of Measure
Reports	Inventory Reports (Inventory Transactions, Costed Inventory Report)

Ascente 4.0 Enhancements/Fixes

In addition, some significant features have been added to the Part Bill of Materials option:

- A picture for the task can be added/displayed here
- Price 1, Price 2, Average Cost and Last Cost are now displayed in the detail grid for the component parts
- A material margin can be defined for the task (with the default set up in the Options & Interfaces (Inventory) screen).
- Options & Interfaces (Inventory) allows you to define which Price (1-4) is updated when you use the Update feature to update prices. This also applies to the new Current Price field, which displays the current price from Inventory. You can manually adjust the price in this screen and it will update the price in inventory.
- A grid displays with the totals of the Labor, Material, Other and Total costs and sell prices. The sell price for Material is based on the Material Margin % noted previously.

Part Bill of Material Maintenance

Part: T1000 Status: Active Picture: Water Heater

Description: Install 40 Gal Gas Water Heater

Additional Description: Install a 40 Gallon gas Water Heater. Includes Earthquake strap, pressure relief valve and permits.

Material Margin %: 0.00 Current Price: 950.00

	Labor	Material	Other	Total
Cost	0.00	560.00	0.00	560.00
Price	225.00	560.00	0.00	785.00

Component Part	Description	Part Status	Skip	Zero Price	Quantity	Price 1	Price 2	Average Cost	Last Cost
WH40Smith	Water Heater 40 Gal Smith	Active	<input type="checkbox"/>	<input type="checkbox"/>	1.00	800.000	900.000	400.0000	400.0000
Pressure Relief Valve	Pressure Relief Valve	Active	<input type="checkbox"/>	<input type="checkbox"/>	1.00	40.000	35.000	19.0384	20.0000
Copper Elbow	Copper Elbow	Discontinued	<input type="checkbox"/>	<input type="checkbox"/>	4.00	50.000	45.000	12.6711	25.0000
L	Labor	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2.50	90.000	85.000	30.0000	30.0000
FX100	Moen Lav Faucet...x	Active	<input type="checkbox"/>	<input type="checkbox"/>	1.00	70.000	75.000	35.0000	35.0000

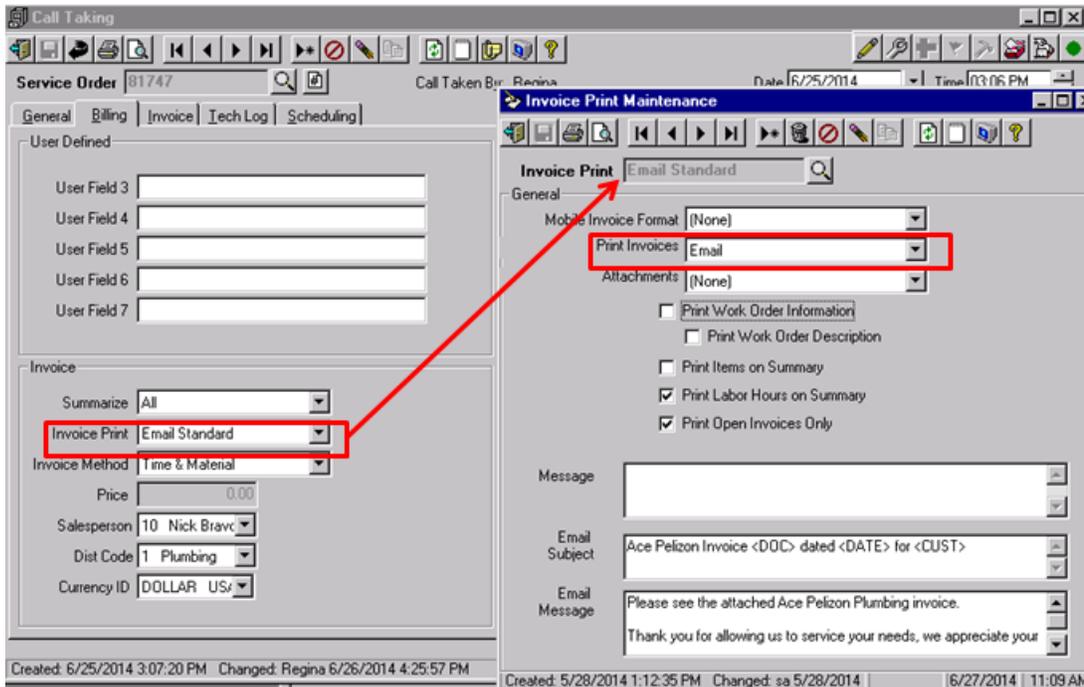
Created: 9/8/2014 10:53:08 AM Changed: sa 9/8/2014 10:53:08 AM 1/13/2015 3:15 PM

Ascente 4.0 Enhancements/Fixes

Invoicing (Service) changes

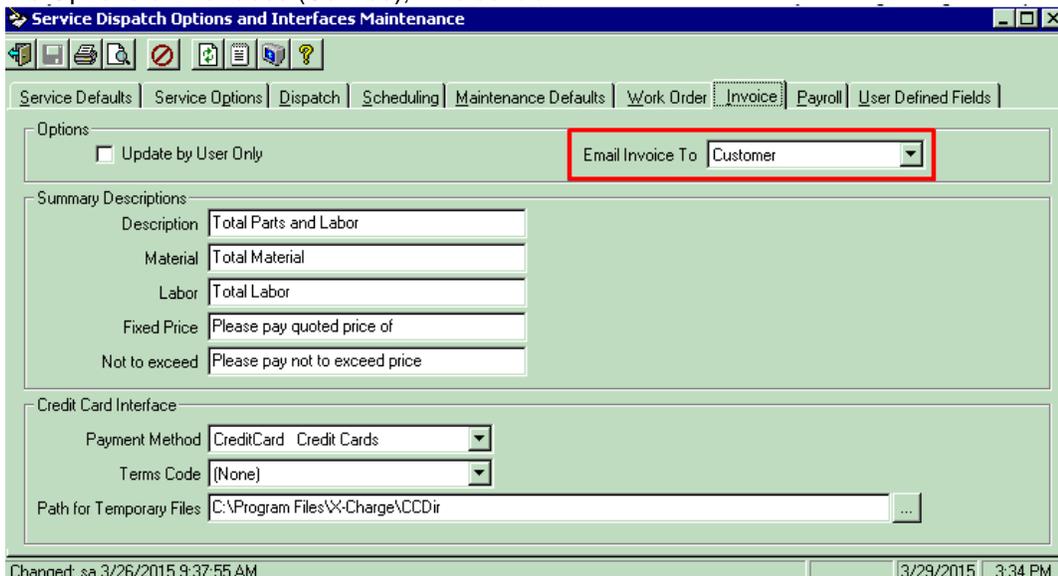
The configuration for the e-mailing of Invoices has changed from the prior versions. Ascente determines if a Service Invoice should be e-mailed instead of printed by checking the Invoice Print value on the Service Order.

- Invoice Print value selected on the Billing Tab of the Call Taking screen must be set to Email for the Print Invoices option



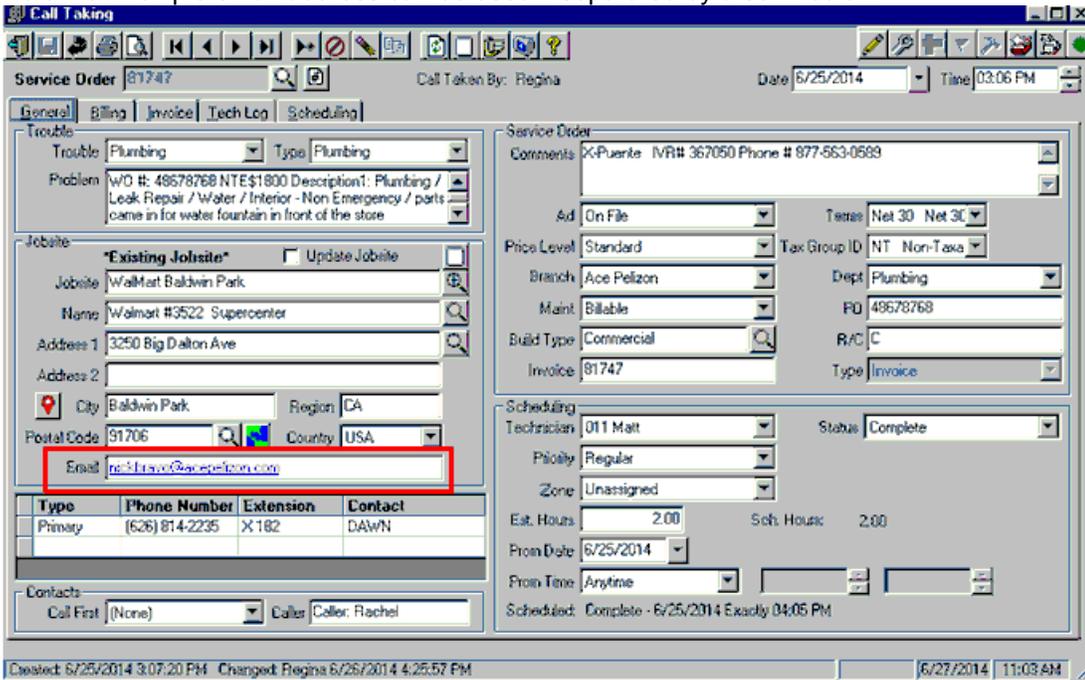
This value defaults from the Jobsite when the Service Order is created in the Call Taking screen, but can be overridden on a call basis.

The system then determines if the invoice should be emailed to the Customer or to the Jobsite by checking the flag in the Options & Interfaces (Service), Invoice tab:



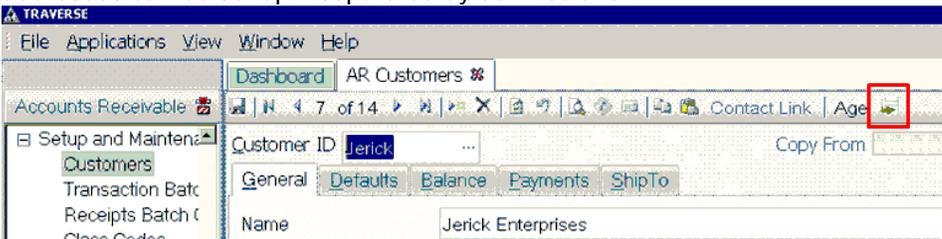
Ascente 4.0 Enhancements/Fixes

If set to Jobsite, the Jobsite e-mail address (must have a value) on the General Tab of the Call Taking screen is used. Note that multiple email address can be used if separated by a semi-colon.



This value defaults from the Jobsite when the Service Order is created, but can be overridden on a call basis.

If set to Customer (Default upon installation), the system checks the document delivery option in the Traverse A/R Customer setup screen to see if an entry has been made for the Serv Inv Document Type. Note that multiple addresses can be set up if separated by semi-colons.



Document Type	Delivery Method	Display Name	Deliver To	Subject	Attachment Format
SERV INV	E-mail	Jerick Enterprises	mrice@compusource.com	Invoice	PDF

To enable e-mailing you will first need to configure the Email Account to be used for sending the invoices. This is done by going to the new System, Maintenance, Email Account option. The on-line help (F1) has details as to how to set up each of these fields.

Email Account Maintenance													
General	Email Account Source	Email From	Email BCC	Email Auth Login	Email Auth Password	Email Host	Host Port	Enable SSL	Use Default Credentials	Email Priority	Delivery Notification	SMTP Delivery Method	Pks
	Compusource	Dispatcher@replyaddress.com				999.999.999.999	25	<input type="checkbox"/>	<input type="checkbox"/>	Normal	0	Network	
	Mobile	compusource.com@gmail.com		compusource.com	I'm an infidel	smtp.gmail.com	587	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal		Network	
	Paging	orspage@ontariorefrigeration.com				10.0.0.53	25	<input type="checkbox"/>	<input type="checkbox"/>	Normal		Network	
	Service Billing	invoices@ontref.com				10.0.0.53	25	<input type="checkbox"/>	<input type="checkbox"/>	Normal		Network	

Ascente 4.0 Enhancements/Fixes

Also in System, Maintenance, Company you will need to be sure to set up the Path for PDF Reports and Store By options. This is where physical PDF copies of the invoices will be stored.

Company PSI Pellyo Services Inc

General
Database AscentePSI

General Ledger
Use Traverse GL Method
Branch GL Segment 2
Department GL Segment 3

Accounts Payable
Calculate Discount for Debit Memos

Paths
Path for Modified Reports c:\Program Files\Ascente\ReportsModified
Path for Temporary Reports c:\Program Files\Ascente\ReportsTemporary
Path for PDF Reports \\Server1\Public\Ascente emailed forms\emailed forms Store by Year

Email
BCC Email john@acepelizon.com

Changed: sa 5/31/2012 4:41:23 PM 6/27/2014 2:47 PM

You will also need to set up at least one Invoice Print option that is set to e-mail invoices. This is done by going to Service Dispatch, Maintenance, Invoice Print. Here is an example:

Invoice Print Email Detail

General
Mobile Invoice Format (None)
Print Invoices Email
Attachments (None)
 Print Work Order Information
 Print Work Order Description
 Print Items on Summary
 Print Labor Hours on Summary
 Print Open Invoices Only

Message

Email Subject
Ace Pelizon Invoice <DOC> dated <DATE> for <CUST>

Email Message
Please see the attached Ace Pelizon Plumbing invoice.
Thank you for allowing us to service your needs, we appreciate your

Created: 5/28/2014 1:26:33 PM Changed: sa 5/28/2014 6/27/2014 2:30 PM

This allows you to set up the subject and body of the email, and you can use special tokens to have the system insert text for you (Invoice #, Invoice Date, Customer ID).

You can also now set up a general message that will appear on all invoices, including the printed copies.

Ascente 4.0 Enhancements/Fixes

To flag an individual jobsite to receive their invoices via email instead of paper, go to Service Dispatch, Maintenance, Jobsite and view the jobsite in question. You will want to be sure the email account on the General Tab is set to the address that should receive the invoice emails (multiple addresses can be entered if separated by a semi-colon (;)).

Jobsite Maintenance

Jobsite: 3200 Mulford Ave.

General | Defaults | Maintenance | Components

Jobsite Address

Name: SCE Federal Credit Union

Address 1: 3200 Mulford Ave.

Address 2:

City: Lynwood Region: CA

Postal Code: 90262 Country: USA

Email: accountspayable@scefcu.org

Customer Address

Customer: SCE12701 Create Customer...

Name: SCE FEDERAL CREDIT UNION

Address 1: 12701 SCHABARUM

Address 2:

City: Baldwin Park Region: CA

Postal Code: 91706 Country: USA

Phone: Fax:

Type	Phone Number	Extension	Contact
Primary	(626) 646-2279		Nick
Secondary	(626) 646-2230		David

Contacts

Call First: (None)

Caller: David

Jobsite Field Notes:

Created: 8/13/2010 1:07:13 PM Changed: ana 6/27/2014 1:24:15 PM 6/27/2014 2:34 PM

On the Defaults Tab you will want to set the Invoice Print option to one of the Email Invoice Print options you have set up.

Jobsite Maintenance

Jobsite: 3200 Mulford Ave.

General | Defaults | Maintenance | Components

Miscellaneous

Call Type: Drain Cleaning

Branch: Ace Pelizon

Zone: Unassigned

Department: Drains

Technician: 078 Eddie Romero

Summarize: All

Maintenance: Billable

Invoice Print: Email Standard

Priority: Regular

Price Level: Standard

Build Type: R/C: C

Tax Group ID: 1 LA County Dist Code: 1 Plumbing

Salesperson: (None) Currency: DOLLAR USA

Credit Information

Terms Code: Net 10 Net 1C

PO Required:

Purchase Order:

User Defined

User Field 3:

User Field 4:

User Field 5:

User Field 6:

User Field 7:

Comments for Service Order

X- Court St
In the Plaza de Mexico.

Created: 8/13/2010 1:07:13 PM Changed: ana 6/27/2014 1:24:15 PM 6/27/2014 2:36 PM

Ascente 4.0 Enhancements/Fixes

If you want to also email Maintenance Contract billings, you will also want to go to the Maintenance Tab and then the Defaults Tab. Here you will set the Invoice Print to be one of the email Invoice Print types you have set up. Note that you will need to set this on the Defaults for Service item if you bill at time of service, or the Defaults for Billing item if you bill independently.

Jobsite Maintenance

Jobsite: 101 Main

Contract: 00

Defaults for: Billing

Trouble: Heating
Call Type: Plumbing
Problem: Maintenance

Service Order:
Branch: LA
Department: Plumbing
Technician: (Unassigned)
SO Status: Open
Salesperson: (None)

Invoice:
Summarize: No Summary
Maintenance: Maint-Full Coverage
Invoice Print: Email Standard
Bill Type: Material
WO Status: Open
Tax Group ID: AZ Arizona St
Terms Code: 1%Disc 1%/1
Customer Level: (None)
Price ID: (None)
Purchase Order:

Created: 1/6/2004 8:02:08 AM Changed: sa 3/24/2010 11:26:37 AM 6/27/2014 2:39 PM

Ascente 4.0 Enhancements/Fixes

Job Cost – Branch/Department Overlays – new feature

The Job Cost Options and Interfaces program has two new fields related to applying Branch/Department Overlays within the Job Cost module:

- Branch/Dept GL Overlay on Costs
- Branch/Dept GL Overlay on Sell

The screenshot shows the 'Job Cost Options & Interfaces Maintenance' window. The 'Options' section contains the following settings:

Use Phases	<input checked="" type="checkbox"/>	Direct Expense Costs	<input type="checkbox"/>
Relieve WIP by User	<input type="checkbox"/>	Only Allow Estimated Cost Codes	<input type="checkbox"/>
Accrue Retention	<input checked="" type="checkbox"/>	Days to Add for Retention	0
Retention on Sales Tax	<input type="checkbox"/>	Branch/Dept GL Overlay on Costs	<input checked="" type="checkbox"/>
Invoice Suffix	01	Branch/Dept GL Overlay on Sell	<input checked="" type="checkbox"/>
Retention Tax Class	0 Non-Taxable		
Accrued Retention GL	29705.00.00 UNEARNED SALES (JOB CC)		
Close Method	Percent Complete		

The 'Defaults' section contains the following settings:

Department	Project
Job Contract Type	Contract
Bill Distribution	Project Activity
Cost Distribution	Material
Tax Class	1 Taxable
Use Tax Cost Code	Sales Tax

The 'Payroll Deduction Codes' section contains the following settings:

Fed'WH	FWH	SDI	004	Misc Ded 1	
Fica	OAS	Other	005	Misc Ded 2	
State Tax	SWH	Vacation	006	Misc Ded 3	

At the bottom of the window, it shows 'Changed: kbuck 5/27/2014 10:50:32 AM' and the date/time '6/18/2014 1:51 PM'.

If the Branch/Dept GL Overlay on Costs box is checked, the system will apply the Branch/Dept Overlay against the WIP GL Account number for the Cost Distribution assigned to the Cost Code used when applying costs to a Job. The Branch/Department come from the Job.

NOTE: This feature should NOT be used if using WIP accounting. This should only be used if Direct Expensing costs.

If the Branch/Dept GL Overlay on Sell box is checked, the system will apply the Branch/Dept Overlay against the Revenue GL Account number for the Billing Distribution assigned to the Job. The Branch/Department come from the Job.

Job Cost, Journals, Inventory to Job

The update now uses the GL Date as the Inventory Transaction Date, rather than the current system date. (ECR 36056)

Ascente 4.0 Enhancements/Fixes

Mobile module – New Features

The following new items have been added to the Mobile menu:

- Options & Interfaces (Mobile Server) – This option and the next one replace the original, generic Options & Interfaces. We have now split it into two sections, one that relates to options on how the Server side of Mobile should function, and the other that has options related to the Mobile Pro functionality in the field.
- Options & Interfaces (Mobile Client) – See above.
- Pay Code Price Level – See the section on the new Payroll Menu for more details.
- Resolution – This allows you to set up Resolution codes and descriptions for use on the Mobile Pro units. Using Resolution codes saves your Technicians time by allowing them to select generic detailed descriptions of the work performed and not have to type in all of the text. The text can be edited as needed.
- Resolution Grouping – This allows you to set up a 3 tier lookup for your Resolution codes for use on the Mobile Pro units.

Paging - redesigned

The Paging system has been redesigned to greatly simplify processing and add new features. Some of the key features are:

- The Digipage service has been eliminated, therefore the following menu items have been removed:
 - o Paging Status Inquiry
 - o Technical History Purge
 - o Options and Interfaces
 - o Technical History Report
- SNPP and Teletrac paging support has been dropped – only Email/Text now available
- When setting up for Text you just need to enter the phone number and select the provider
- Immediate notification given as to if page sent/not sent
- Attachments can be added to messages
- New combo address field that can be sent to the tech that will typically show as a hyperlink on the phone for ease of map lookup on the phone
- Separate E-mail configurations for Mobile, Service Invoices and Paging
- The Subject Line for the email defaults to “Service Order: 99999” and can be overridden.

Payroll Menu – New Feature

A new Payroll menu has been added to Ascente. This has all of the items needed for processing payroll related transactions. Some key features that this affords are:

- Timecard Entry and update
- Techlog Timecard Update – new feature that can create Timecard transactions based on Techlog entries (see more details below)
- Maintenance of all items related to payroll transactions, including a new Pay Code Price level option (see more details below)
- Reports

NOTE: Due to a change in the way Payroll Leave works in Traverse 11 you will need to insure that the Leave Codes (ie, Vacation, Sick) are named exactly the same as the corresponding Earning Codes. Also the Earning codes MUST have “L” as the Earning Type.

Ascente 4.0 Enhancements/Fixes

Payroll, Journals, Techlog Timecard Update – New Feature

A new Techlog Timecard Update feature has been added to the system. This can be accessed from the new Payroll menu or the Service Dispatch, Journals menu.

This new feature allows you to create Timecard transactions based on Techlog entries. The Techlog gets updated from the Call Inquiry and Dispatch option when you enter transactions and the Add to Log box is checked. This program will calculate the Technicians work time based on these log records and then create the appropriate Timecard transactions. If using this method to create Timecard transactions, you would want to run this option daily to keep the information current.

The labor hours can be posted to the Timecard using one of 3 calculation methods:

- Nearest 1/10th hour
- Nearest ¼ hour
- Nearest whole number

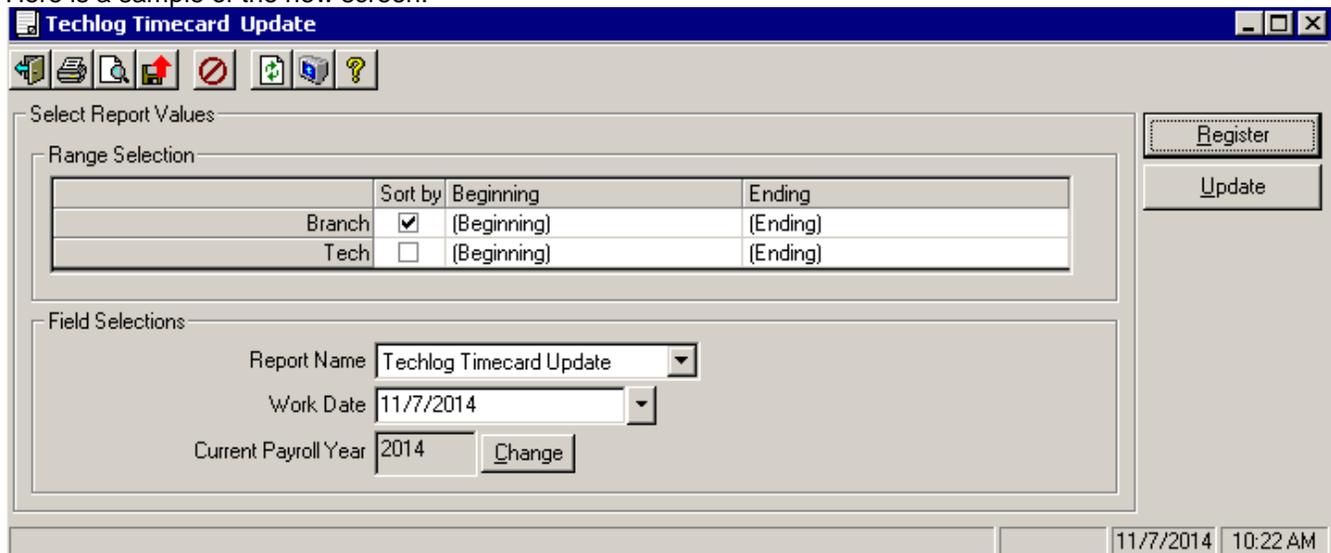
Currently this setting, along with the Earning Code to use, must be set up by your customer service representative. Please contact us if you want to use this feature.

A register will print that shows the calculated Work, Drive, Idle, Total and Lunch times based on the Techlog transactions. The table below shows how the program determines the category of time.

	Status Changed To:				
Status Changed From:	Dispatched	Arrived	Closed, Progress Bill	Quit	Other
Dispatch	Idle	Drive	Work	Work	Idle
Arrive	Work	Work	Work	Work	Work
Closed, Progress Bill	Idle	Drive	Work	Work	Idle
Lunch	Lunch	Lunch	Work	Lunch	Lunch
Quit	Off	Off	Work	Off	Off
Other	Idle	Drive	Work	Off	Idle

Once the time has been posted to Timecards using this new option, you can go into Timecard Entry and edit the transactions (if necessary) before posting to Traverse and the Work Orders.

Here is a sample of the new screen:



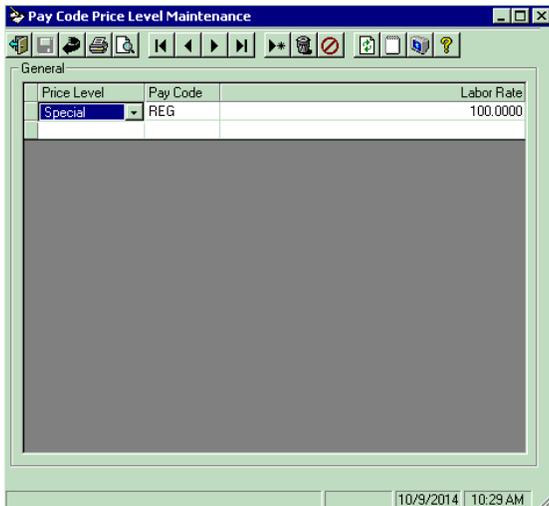
Ascente 4.0 Enhancements/Fixes

Here is a sample of the new Register that prints:

WorkDate	SO #	W/O	Start	End	WorkTime	DriveTime	IdleTime	TotalTime	LunchTime	OffTime	Last Status
Page 1 of 2											
Technician Timecard Update by Service Order											
All Dates											
Branch	California										
Tech	FranklinJoe		Joe Franklin								
11/7/14	CA000111	CA000111	8:00 am	10:12 am	1.71	.50	.00	2.21	.00	.00	Closed
Total Tech : FranklinJoe					1.71	.50	.00	2.21	.00	.00	# Rec: 1
Total Branch : California					1.71	.50	.00	2.21	.00	.00	# Rec: 1

Payroll, Maintenance, Pay Code Price Level – New Feature

A new Pay Code Price Level option has been added to the system that allows you to define special labor sell prices related to a Price Level/Pay Code combination. This is useful when you have contracted with a group of jobsites to charge a different labor rate than the norm. You can set the rate to be different for Regular, Overtime or any other Pay Code. You must first set up entries in the Pay Code file before adding entries in this screen.



Ascente 4.0 Enhancements/Fixes

Payroll, Reports, Certified Payroll Report – Can report on Service work - New Feature

The Certified Payroll Report has been adjusted such that Service work, in addition to Job Cost Jobs, can now appear on the report. To take advantage of this feature you would need to go into Service Dispatch, Maintenance, Jobsite and check the new “Certified Payroll for Service” box for those Jobsites you want to report. Note that ALL service work for these Jobsites will appear on the Certified Payroll Report.

The screenshot shows the 'Jobsite Maintenance' application window. The title bar reads 'Jobsite Maintenance'. Below the title bar is a toolbar with various icons. The main window has a search bar for 'Jobsite' containing '135 Ontario Rd.'. There are four tabs: 'General', 'Defaults', 'Maintenance', and 'Components'. The 'General' tab is active. It is divided into several sections: 'Jobsite Address' with fields for Name (Jennifer Yang), Address 1 (135 Ontario Rd.), Address 2, City (Ontario), Region (CA), Postal Code (91762), and Country (USA UNIT); 'Customer Address' with a Customer dropdown (Default), Name (Default Customer), Address 1 (NEW CUSTOMER TEMPLATE), Address 2, City, Region (USA), Postal Code, Phone, and Fax; a 'Payroll' section with a checked checkbox for 'Certified Payroll for Service'; a table for contacts with columns 'Type', 'Phone Number', 'Extension', and 'Contact'; and a 'Contacts' section with 'Call First' (Primary) and 'Caller' (Jennifer) dropdowns. A 'Jobsite Field Notes' text area is at the bottom right. The status bar at the bottom shows 'Created: 2/19/2014 9:30:21 AM' and 'Changed: sa 2/19/2014 9:30:21 AM'.

Type	Phone Number	Extension	Contact
Primary	(909) 565-1656		Jennifer

Ascente 4.0 Enhancements/Fixes

Purchase Order Module – New Feature

A new Purchase Order module has been added to Ascente. Upon installation your existing Traverse Purchase Orders will be imported into this new module. Some key features that this affords are:

The screenshot shows the 'Purchase Order Entry' window. Several callouts highlight new features:

- Ship To address defaults to the Branch address**: Points to the 'Ship-to' tab.
- Can change PO# PO# is now 10 characters instead of 8 Can assign PO Number ranges by Branch**: Points to the PO# field.
- Can change vendor as long as not invoiced**: Points to the Vendor dropdown.
- New Inventory Date and Receive All button**: Points to the 'Inventory Date' field and the 'Receive All' button.
- A new button has been added to allow lookup of PO's by a Part or Part Description**: Points to a magnifying glass icon in the toolbar.

Application	Purchase Order	Reports
Service Dispatch	Transactions	Purchase Order Print
Job Cost	Journals	Purchasing Reports
Quotes	Periodic	
Inventory	Maintenance	
Purchase Order	Inquiries	
Paging	Reports	
Flat Rate	Favorites	

The screenshot shows the 'Purchase Order Print' report window. A callout highlights the 'Select Report Values' section:

Can print all PO's created for a certain date, branch, vendor or PO# range

Range Selection	Beginning	Ending
Branch	(Beginning)	(Ending)
Vendor	(Beginning)	(Ending)
Purchase Order	(Beginning)	(Ending)
Create Date	(Beginning)	(Ending)

Ascente 4.0 Enhancements/Fixes

Purchase Order Entry

Purchase Order No: 1003 Transaction Type: Order

Main | Ship-to | Detail | Totals

Part: Test Part Description: Additio...

Update: Work Order: 010018M Service Order: Jobsite:

Location	G/L Account	Ordered	Quantity	Unit	Unit Cost	Extended Cost
Ontario Wareh...	99999.00.00 SUSPENSE	1.00	1.00	Each	10.00	10.00
		Received	1.00		10.00	10.00
		Invoiced	0.00		0.00	0.00

Can link to a Work Order from PO Entry if own the Quick PO module

Can see history of PO line transactions

New button to lookup purchase history by vendor/part of all purchases of part

Purchase Order Transactions

Transaction Da	Type	Quantity	Unit Cost	Reference	Part Number	Location	Updated By	Update Date	Created On
6/5/2014	Ordered from WO	60.00	3.99		FP202502	Kevin Jamroz Iburros		6/5/2014 11:32:21 AM	6/5/2014
6/5/2014	Received from WO	60.00	3.99		FP202502	Kevin Jamroz Iburros		6/5/2014 11:32:21 AM	6/5/2014

Cost History for Part 'PREP'

Vendor	Location	Quantity	Unit Cost	Extended Cost	Unit of Measure	PO Number	PromiseDate	Updatd By	Update Date
UNITED2165	Ontario Warehouse	1.00	6.00	6.00	Each	1003	3/3/1997	CONVERSION	4/18/2014
UNITED2165	Joe Johnson	1.00	6.00	6.00	Each	1138	3/4/1997	CONVERSION	4/18/2014
UNITED2165	David Xie	2.00	6.00	12.00	Each	2638	6/4/1997	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	1.00	5.00	5.00	Each	2839	6/13/1997	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	1.00	5.00	5.00	Each	8843	5/13/1998	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	2.00	10.00	20.00	Each	17943	6/22/2000	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	1.00	50.00	50.00	Each	18617	8/7/2000	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	-1.00	50.00	-50.00	Each	18617	8/7/2000	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	2.00	5.00	10.00	Each	18617	8/7/2000	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	1.00	5.00	5.00	Each	19575	10/4/2000	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	3.00	5.00	15.00	Each	19576	10/4/2000	CONVERSION	4/18/2014
UNITED2165	Max Valderrama	1.00	5.00	5.00	Each	21333	2/8/2001	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	3.00	10.00	30.00	Each	23234	6/26/2001	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	2.00	5.00	10.00	Each	23365	7/5/2001	CONVERSION	4/18/2014
UNITED2165	Ontario Warehouse	1.00	10.00	10.00	Each	23596	7/19/2001	CONVERSION	4/18/2014

Ascente 4.0 Enhancements/Fixes

The Purchase Order menu options available are;

Transactions	Purchase Order A/P Invoice
Journals	A/P Register
Periodic	Move PO's to History
Maintenance	Branch Unit of Measure
Inquiries	A/P Vendor Inquiry
Reports	Purchase Order Print Purchasing Reports (PO History Report, PO's Not Received, PO's Received Not Invoiced)

In conjunction with the Purchasing changes, the A/P Invoice Entry program has been changed to allow the following:

- Location and Part can now be entered on the line items if the invoice is not linked to a PO or a Job. When the invoice is updated, the on-hand quantity for the part/location will be updated as well.
- A new lookup button has been added next to the Quantity field that allows you to see purchase history if the part on the line is set up in Inventory

Purchase Order Print has the following new capabilities:

- Can now have multiple PO formats
- Can set up Form Printing for PO to automatically print multiple copies of a PO to different printers
- Can print all PO's created on a specific date, branch, or vendor
- Added the ability to print the following fields on the PO:
 - Terms Description
 - Copy Description (from Forms Printing)
 - Vendor Account Number
 - Vendor Email
 - Product Line

Quotes, Report, Quotes Reports, Proposal Form

Added the following features to the Quote Proposal Forms:

- The following fields are now available for printing:
 - Ad Code and Description
 - Customer Phone, Fax and Email
 - Invoice Method
 - Jobsite Email
 - Jobsite Phone #'s (all 5)
- Forms Printer options can now be set up, along with the ability to print a copy description (ie, Customer Copy, File Copy, etc)
- Added a new Quote Proposal Form – PM report option that can be used for Service Contract Proposals.
- Add Tech as a range option for all reports.

Quotes, Transactions, Quotes

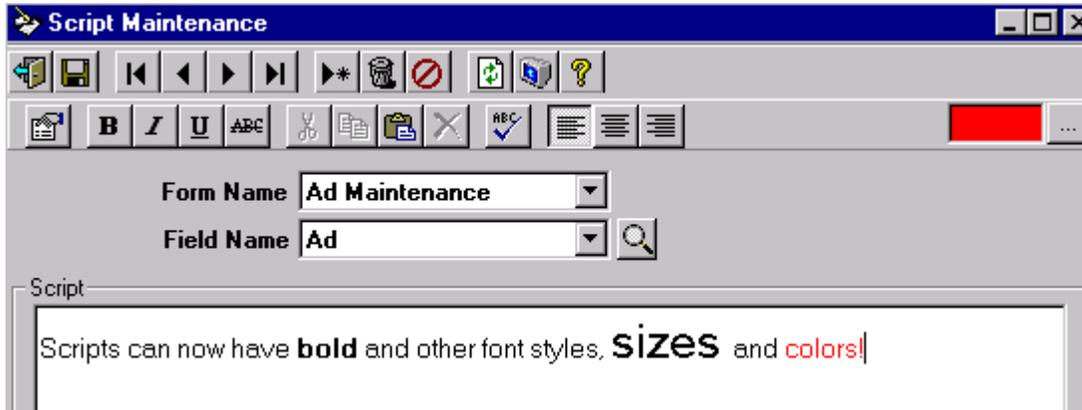
The following new features are now available in Quote Entry:

- The Unit Cost will default from Inventory, if a stock part is entered, but this value can now be overridden.
- When initially entering a detail line you can double click in the Unit Price field to have the system display how it calculated the price. Once the line has been saved, this feature is no longer available.

Ascente 4.0 Enhancements/Fixes

Scripting

Now allows you to adjust the font, size, style (regular, bold, italic, underline) and color.



Service Dispatch, Journals, Prebill Register

The Prebill Register will now allow the updating of Progress Bill type Service Orders where not all Work Orders are closed. Only the closed Work Orders will be moved to history.

Service Dispatch, Journals, Timecard Register

The Timecard Register now writes the Earnings Code into Work Order Lines. This way the Recalc Pricing option can take the Earnings Code into account.

Also the system will now apply Branch/Department overlays to the Burden and Fringe GL postings if the Branch/Dept GL Overlay on Costs box is checked in the Options & Interfaces (Construction) screen and the time is for a Job Cost Job.

Ascente 4.0 Enhancements/Fixes

Service Dispatch, Maintenance, Jobsite

A new check box has been added to flag the Service work for the Jobsite to appear on the Certified Payroll Report. If checked, all Service work for the Jobsite will appear on the Certified Payroll Report. Previously only Job Cost Jobs had this ability.

Jobsite Maintenance

Jobsite: 135 Ontario Rd.

General | Defaults | Maintenance | Components

Jobsite Address:

Name: Jennifer Yang

Address 1: 135 Ontario Rd.

Address 2:

City: Ontario Region: CA

Postal Code: 91762 Country: USA UNIT

Email:

Customer Address:

Customer: [Default] Create Customer...

Name: Default Customer

Address 1: NEW CUSTOMER TEMPLATE

Address 2:

City: Region: USA

Postal Code: Country: USA

Phone: Fax:

Email:

Payroll:

Certified Payroll for Service

Type	Phone Number	Extension	Contact
Primary	(909) 565-1656		Jennifer

Contacts:

Call First: Primary

Caller: Jennifer

Jobsite Field Notes:

Created: 2/19/2014 9:30:21 AM Changed: sa 2/19/2014 9:30:21 AM

Service Dispatch, Maintenance, User Field Values

Changed to allow up to 30 characters for a value (was 20).

Service Dispatch, Reports, Accounting, Payment History Report - New

Added a new Payment History Report to the system to assist with auditing payments made from Mobile Pro or directly entered on a Work Order. The report lists payments that are both posted and unposted.

Service Dispatch, Reports, Sales Analysis

Changed the Sales Analysis reports to prompt for Price Level range instead of Customer Level, since Customer Level is no longer used in Ascente.

Service Dispatch, Transactions, A/P Invoice

Added the following capabilities to A/P Invoice Entry:

- Added Extended Cost to the PO Lookup option
- Added the ability to enter Location and Part on a line that is NOT related to a Purchase Order or Job. When the Invoice is updated, the inventory On-Hand quantity will be adjusted by the amount on the line.
- Invoice Complete option now updates Freight and Misc and the associated Tax Classes from the PO.
- Added the ability to move lines up/down on the detail table with a right click.

Ascente 4.0 Enhancements/Fixes

Service Dispatch, Transactions, Call Taking

Moved Tax Group and new Price Level field to the Main tab for ease of controlling pricing.

Call Taking

Service Order: 10423 Call Taken By: Conversion Date: 2/6/2014 Time: 10:37 AM

General | Billing | Invoice | Tech Log | Scheduling

Trouble: No Air Type: Maintenance ASP SC
Problem: remote access ck 1st floor temp by teller line too cold.

Jobsite: *Existing Jobsite* Update Jobsite
Jobsite: Cbt/Dakland 1040002
Name: Cal Bank And Trust/107 Oakland
Address 1: 400 20Th Street
Address 2:
City: Oakland Region: CA
Postal Code: 94612 Country: USA UNIT

Service Order
Comments:
Ad: (None) Terms: 888 Due On F
Price Level: San Jose 70 Tax Group ID: 8905 Oakland
Branch: San Jose Dept: Spot
Maint: Billable PD:
Call Type: Standard Service Call Age:
Invoice: Type: Invoice

Scheduling
Technician: SJ MAshton Status: Closed
Priority: Regular
Zone: Ontario
Est. Hours: 1.00 Sch. Hours: 1.00
Prom Date: 2/6/2014
Prom Time: Anytime
Scheduled: Closed - 2/6/2014 Anytime

Type	Phone Number	Extension	Contact
Primary			

Contacts
Call First: (None) Caller:

Created: 4/17/2014 1:05:39 PM Changed: sa 4/17/2014 1:05:39 PM 6/18/2014 1:58 PM

Ascente 4.0 Enhancements/Fixes

Removed Tax Group, Cust Level, Mat'l Price Break and Price ID from the Billing tab. Tax Group has been moved to the Main tab, all other items are no longer needed.

The screenshot shows the 'Call Taking' application window. At the top, the title bar reads 'Call Taking'. Below it is a toolbar with various icons. The main area is divided into several sections:

- Service Order:** 10423, Call Taken By: Conversion, Date: 2/6/2014, Time: 10:37 AM.
- General | Billing | Invoice | Tech Log | Scheduling:** The 'Billing' tab is selected.
- User Defined:** Fields for User Field 3 (27429), User Field 4, User Field 5, User Field 6, and User Field 7.
- Invoice:** Summarize: Labor, Invoice Print: Print Detail, Invoice Method: Time & Material, Price: 0.00, Salesperson: 1 House Acc, Dist Code: 1 Commercial, Currency ID: USD US Doll. A red box highlights a field in this section.
- Customer Information:** Customer: CALIF30332, Name: California Bank And Trust, Address 1: Altn Bryant Scott, Address 2: 11622 El Camino Real Ste 200, City: San Diego, Region: CA, Postal Code: 92130, Country: USA UNIT, Phone: (858) 793-7430, Fax: [empty], Email: [empty].
- Maintenance:** Maint. Contract: [empty], Maint. Date: [empty], Labor Grade: [empty].
- Job Cost:** Job: [empty], Phase: [empty].

At the bottom, the status bar shows: Created: 4/17/2014 1:05:39 PM, Changed: sa 4/17/2014 1:05:39 PM, 6/18/2014 2:01 PM.

Adjusted the default size of the Call Taking screen to be larger.

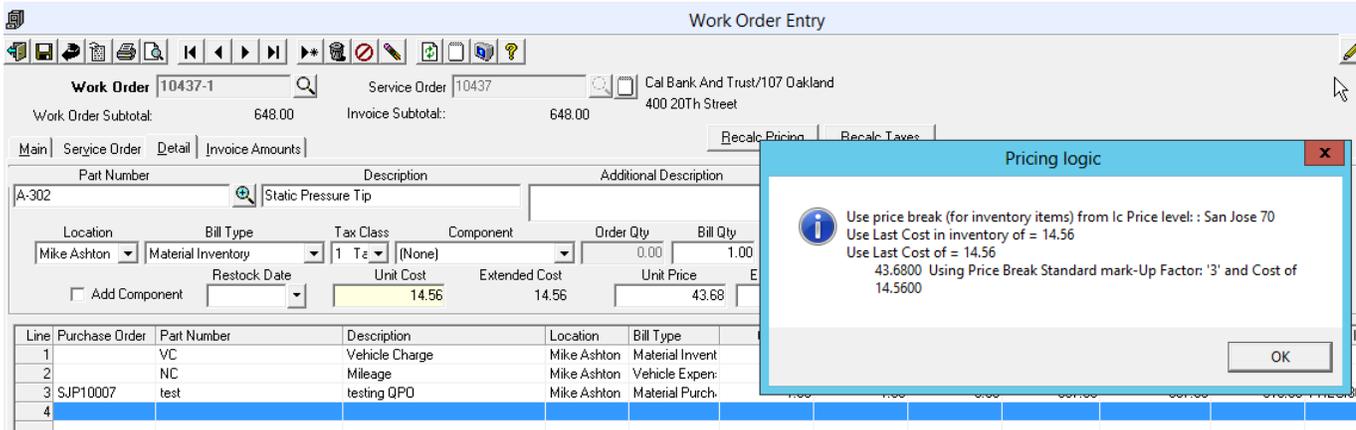
Service Dispatch, Transactions, G/L Journal

Added a new feature where the Description field will default from the prior line, except if the prior line has a job associated with it.

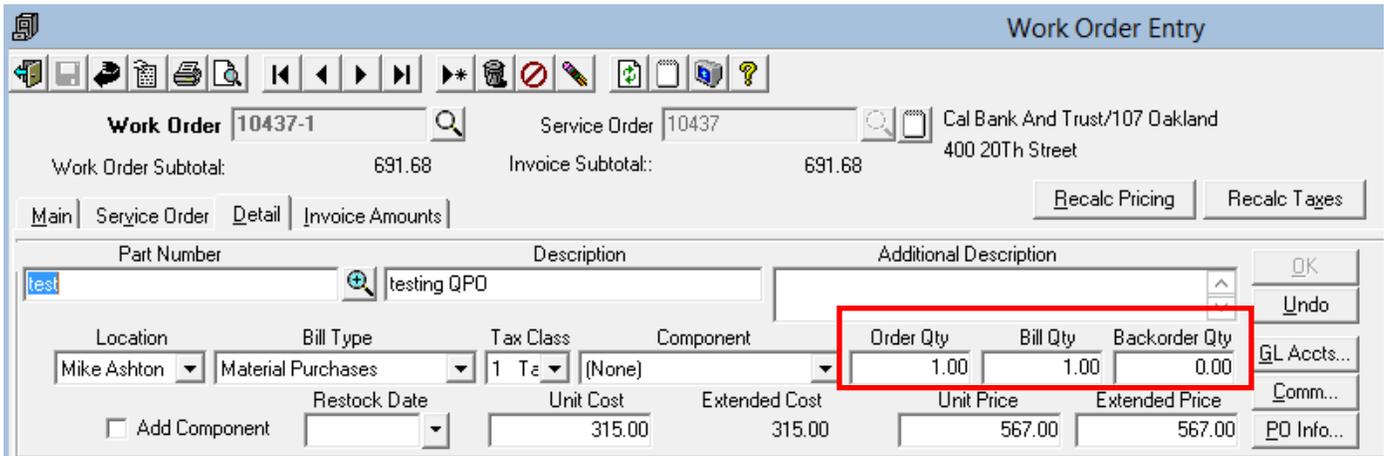
Ascente 4.0 Enhancements/Fixes

Service Dispatch, Transactions, Work Orders

When entering a new line can now double click in the Unit Price field to see how the price was calculated (Note that after the line has been saved this feature is not available).

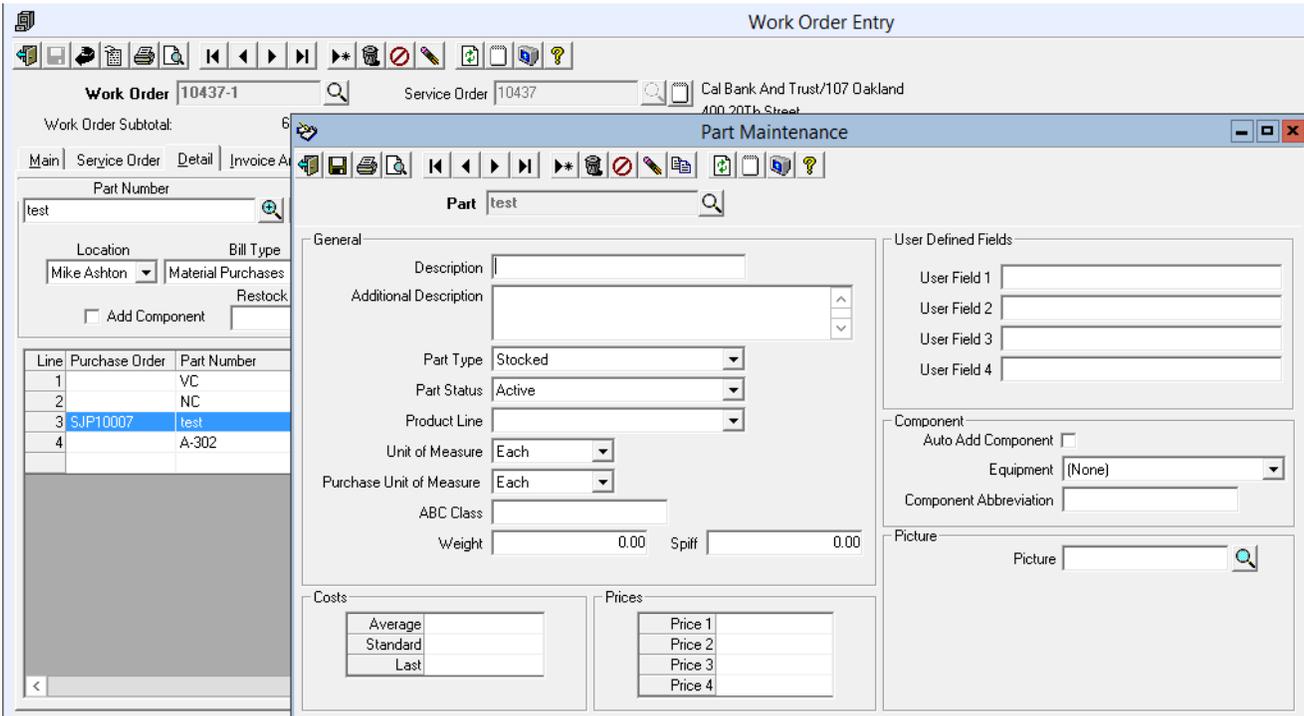


Have added new Ordered, Bill and Backorder fields. These come into play with Quick PO's. Ordered is the quantity that was ordered on the PO. Billed is quantity that is being charged to this Work Order (cannot be greater than ordered). If less than ordered, the difference will be put into truck stock. If an amount is put in the Backorder field, the PO will NOT have this amount flagged as received.

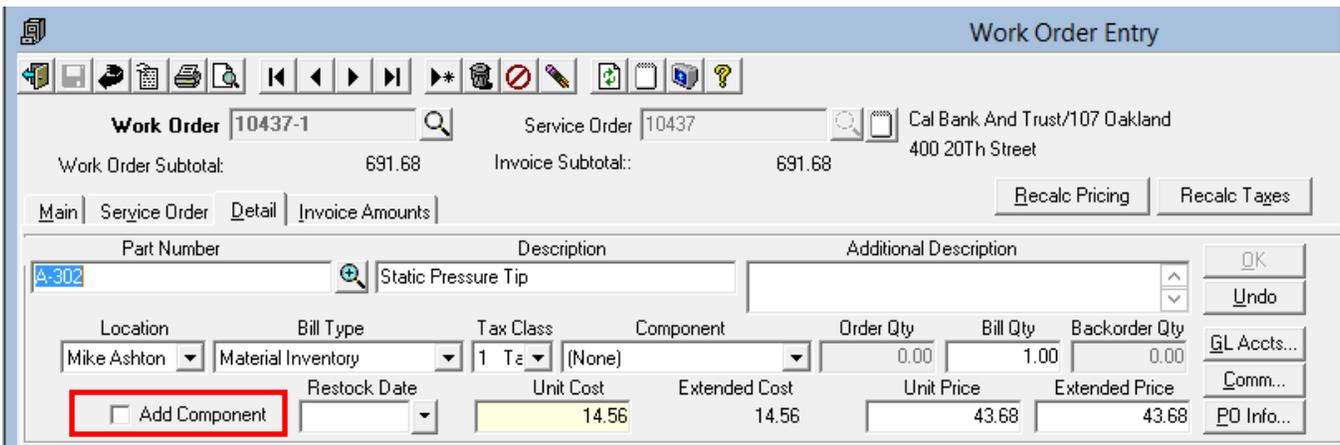


Ascente 4.0 Enhancements/Fixes

Can now press F6 at the Part field to set up a new part on the fly.



A new “Add Component” flag has been added. If this is checked, when the Work Order is billed a new Component will be added to the Jobsite with this part information. Part Master has a flag to default this.



If a stock part is entered against a location that does not have the part set up, the system will automatically add the part to that location.

Ascente 4.0 Enhancements/Fixes

Service Dispatch, Periodic, Work Restock Register

This option now not only flags the Work Orders as having been restocked, it also updates the Quantities in the inventory system. The Location assigned to the Branch that is linked to the Work Order will have the On Hand value reduced for the part, and the technician vehicle location will have the On Hand value increased. If the part does not exist in either location, the system will automatically add it.

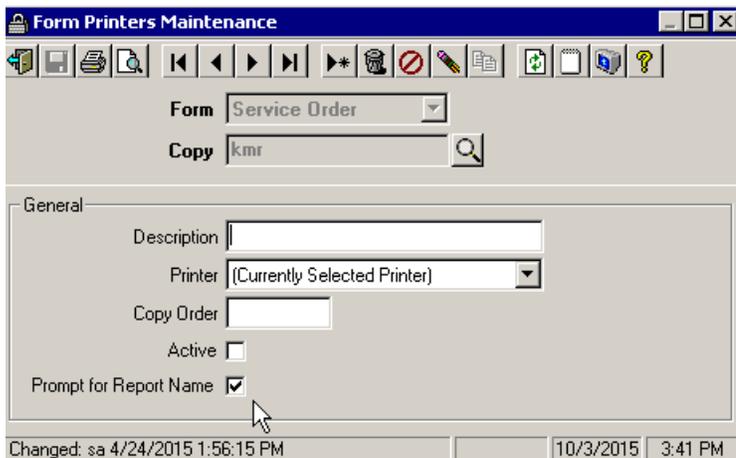
Service Dispatch, Reports, Service Order Print

Adjusted the Company Name on the Maintenance format to be a smaller font and a larger width to accommodate larger company names.

System, Maintenance, Form Printers

Added the ability to set up Form Printers for Purchase Orders and Quotes.

Added a new flag to indicate if the user should be prompted for the report name. This is useful if you have multiple formats and want to choose the format at print time.



The screenshot shows a software window titled "Form Printers Maintenance". At the top, there is a toolbar with various icons. Below the toolbar, there are two dropdown menus: "Form" set to "Service Order" and "Copy" set to "kmr". The main area is labeled "General" and contains the following fields and controls:

- Description: [Empty text box]
- Printer: [Currently Selected Printer] (dropdown menu)
- Copy Order: [Empty text box]
- Active:
- Prompt for Report Name: (checked)

At the bottom of the window, there is a status bar with the text "Changed: sa 4/24/2015 1:56:15 PM" and a date/time stamp "10/3/2015 3:41 PM".

Ascente 4.0 Enhancements/Fixes

Fixes

General

- **Address Entry:** Fixed a problem where an error would occur if F2 (lookup) was pressed while in the Address 1 field, but no lookup was available in the current form (ie, Branch). (ECR 33288)

Flat Rate, Reports, Flat Rate Price Book

- Fixed a problem where an error would occur if any report ranges were entered. (ECR 33947)

Inventory, Maintenance, Part Bill of Material

- Changed the program to save temporary files related to Picture setup in the ReportsTemporary folder instead of C:\, as often users would not have permissions to access C:\. (ECR 35541)

Job Cost, Maintenance, Job

- Fixed a problem with the listing option where the Job # range entered by the user was being ignored. (ECR 36098)

Job Cost, Periodic, Job Use Tax Posting

- Fixed a problem where if the last job only had one cost transaction to be updated, it would be merged with the prior job for both the GL and Job Detail postings. (ECR 35891)

Purchase Order, Reports, Purchasing Reports, PO's Received Not Invoice

- Fixed a problem where the report was including items that had been received and invoiced in full and was excluding non-stock items. (ECR 36099)
- Fixed an issue where the PO Type was not being printed. (ECR 36134)

Purchase Order, Transactions, Purchasing Order

- Fixed an issue where the unit cost would be rounded incorrectly if you left it at zero and entered in an extended cost. (ECR 36110)
- Fixed an issue where the location on the main tab was not defaulting correctly when based on the Branch, when the default branch was used. (ECR 36128)
- Fixed an issue where the F2 key was not working on the Ship To tab. (ECR 36097)
- Fixed an issue where if a Job was selected on the Ship To tab the address information was not being pulled in. (ECR 36106)

Quotes, Transactions, Quotes

- Fixed a problem where the Jobsite address would be cleared if a Job is created from the Quote. (ECR 34898)
- Fixed a problem where a locking error would occur if deleting lines and the totals tab was set to "Price" for Overhead. (ECR 36061)

Service Dispatch, Inquiries, Work Order History Inquiry

- Fixed a problem where the toolbar security for a user was not being respected. (ECR 36409)

Service Dispatch, Journals, Service Order Workflow Register

- Fixed a problem where an error would occur if a Mobile Line Date range was entered.

Ascente 4.0 Enhancements/Fixes

Service Dispatch, Maintenance, Jobsite

- Fixed a problem where the Change ID function for a Component would not update the custom fields or notes related to the Component. (ECR 34931)
- Fixed a problem on the Contract tab where the system was comparing the Contract Start Date to the Next Amortization Date, even if the amortization feature was not turned on. (ECR 36181)
- Fixed a problem where the Tax Group was not defaulting correctly on a new record. This now defaults from the postal code assigned to the Jobsite and if not set there will come from the Customer.
- The Sales Rep will now default from the Customer if not set by the user when adding a new Jobsite.

Service Dispatch, Maintenance, Worker Compensation

- Fixed a problem where the experience factor would be reset back to 1 after making a change, if the display order was set to alphabetical. (ECR 34408)

Service Dispatch, Reports, Accounting, A/R Payment History

- Made corrections to the formatting and adjusted the report to look more standard. AcctgPaymentHistoryInquiry.rpt

Service Dispatch, Reports, Jobsite Reports, Jobsites by Customer

- Fixed a problem where the report was hardcoded to read the customers from the CPU company. (ECR 35665)

Service Dispatch, Reports, Label Printing, Service Order Labels (5160)

- Fixed a problem where the report was always giving an error.

Service Dispatch, Reports, Schedule Report

- Fixed a problem where an error would occur if a range of supervisors was entered. (ECR 36237)

Service Dispatch, Reports, Work Order Quote

- Fixed a problem where an error would occur if there were no Service Orders within the range entered by the user. (ECR 35789)

Service Dispatch, Transactions, A/P Invoice

- Fixed an issue where F6 from the Part field was not taking you to Part Maintenance. (ECR 36057)
- Fixed an issue where if you changed the default GL account it would immediately revert back to the default, but if you changed it a second time it would remain. (ECR 36031)

Service Dispatch, Transactions, Call Taking

- Fixed an issue where the Price field was not being enabled/disabled correctly. Now is enabled if the Invoice Method is Fixed Price or NTE and is disabled if the Invoice Method is T&M. Also set to the Invoice Amount on the Invoice Tab is only enabled if the Invoice Method is T&M and the Calculate Invoice Amount Flag in Service Options on the Work Order Tab is not checked. (ECR 36015)

Service Dispatch, Transactions, Work Orders

- Fixed a problem where the GL Acct button label would not be displayed correctly in some situations. (ECR 35571)
- Fixed an issue where the Price field was not being enabled/disabled correctly. Now is enabled if the Invoice Method is Fixed Price or NTE and is disabled if the Invoice Method is T&M. Also set to the Invoice Amount on the Invoice Tab is only enabled if the Invoice Method is T&M and the Calculate Invoice Amount Flag in Service Options on the Work Order Tab is not checked. (ECR 36015)
- Fixed an issue where the Invoice Amount was not getting set correctly in some situations for NTE type invoices. (ECR 36005)
- Fixed an issue where the spiff amount was cleared on stock items when the Recalc Pricing button was used. Note that the spiff amount will still be cleared on non-stock items. (ECR 36129)

Ascente 4.0 Enhancements/Fixes

System, Reports, Log Reports, Version Log Listing

- Fixed an issue where incorrect range values were being asked. (ECR 35950)