## Version 11 Updates: Why You Want This Version

Version 11 of ESC is here and available for upgrade. It's packed with new features and functions to make managing your service business easier than ever. Overall, this release is about improving your workflow. From qualifying your customers, to creating quotes, to dispatching technicians to complete the quoted work, to creating invoices, the whole process has been streamlined even further and puts you in control of the process.

#### **Sales Invoicing**

The Sales Invoicing Module underwent a complete redesign, which made it even more intuitive, added time-saving functions, and made more useful information readily available.

- The sales invoicing module has a new and clearer design and is now in the .NET framework.
- There is a new "View Details" button, which lets users with the right permissions view the costs of parts and labor used on an invoice, making it easier to see the profitability of each invoice.
- You are now able to adjust the quantity of assemblies, which will automatically calculate the quantities and costs of all the components that make up that assembly.
- This version also lets you adjust the quantity of flat rate parts on an invoice.
- You are now able to make templates out of the invoices you create, which will dramatically reduce the time you spend on creating common invoices involving many line items. Rather than having to create each invoice from scratch, you can just load the template you created and make any necessary modifications before saving.
- A new search screen in the Sales Invoicing Module makes it easy to recall recently modified invoices without having to enter detailed search criteria.
- The Sales Invoicing Module now supports barcode scanning, letting you scan parts and items directly onto an invoice.
- You're can now modify the details of equipment you sell from within the sales invoicing module.
- The "Tender" button is now available right on the Sales Invoicing toolbar.
- You can create a credit memo directly from a saved invoice's activities menu.
- The credit memo function now has its own screen, making it simpler to create a credit memo from an invoice.

## Quotes

ESC now has a standalone quotes module that lets you enter, edit, and manage quote status in its own screen.

- The updated Quote List Report gives a number of different sorting options as well as summary statistics (such as quote status and closing ratios) for each individual sales person.
- There is a new screen that lets you selectively cost out the parts on a quote when making it into a dispatch, making dispatching from an accepted quote an easy one step process.
- There is now a "Status" drop down, which lets you keep track of whether a quote is pending, accepted, or rejected. ESC automatically updates the status to "Accepted" when you create a dispatch or invoice from the quote.
- There is a new search screen in the Quotes Module that makes it easy to recall recently modified invoices without having to enter in detailed search criteria.
- You can also make templates from the quotes you create, reducing the time you spend on common or reoccurring quotes involving many line items.
- The Quotes Module also has a new "Markup%" field, which lets you adjust your markup percentage on individual line items as you create the quote.
- Any equipment or service agreements you attach to a quote will also carry over to the dispatch you create from the quote.

# **Qualification Screen**

The Customer Qualification screen is the most visibly modified screen. It underwent a complete redesign with drag and drop functionality that lets you adjust and modify your screen layout so it displays the information that is most important to you.

- You are able to choose from a number of our included layout templates, or create your own templates.
- There is a new "Refresh" button on the Qualification Screen tool bar which lets you quickly see how the changes you made in different modules affected the customer.
- A "Create Quote" option is now under the Activities menu.
- There are three new columns of information in the Invoices/Quotes panel of Qualification Screen: Billed %, Associated Quote, Quote Status.

# **Dispatching Module**

The Dispatching Module and the Dispatch Ticket Layout Designer both have new features to put you in control of the information that appears on printed tickets and that shows up in your customers' history.

- The dispatch ticket layout design now has multiple grow-able body fields and grouping so that all the information you need on your printed tickets will appear.
- There is also a line spacing option to make your customized tickets fit onto preprinted forms.

- The ticket designer also lets you decide if you want the customer's entire equipment list to print or only the equipment that is attached to that dispatch.
- You can now decide to post dispatch notes to the invoice and to the customer history.
- There is a new pull down menu to select which billing code to use in posting dispatch notes.
- There is also an option to select which billing code to use for dispatch notes that are posted to the invoice.

#### **ESC** Accounting Software

The ESC Accounting Software package also has some expanded features and updates, including reoccurring credit card transactions and "work-in-progress" options.

- You can now set up automated recurring credit card transactions from several screens including "Enter Customers", "Enter Agreements", and "Sales Invoicing".
- There is a new work-in-progress option, a WIP Enabled checkbox, and Closing Account drop down in Enter Chart of Accounts for asset and liability accounts.
- If you set the status of a job that has money in WIP accounts to "Closed", a journal entry screen will come up that moves money from the WIP accounts to the closing accounts when you save.

## Miscellaneous

- A new data structure makes auto-fill searching much faster in large databases.
- There is now a summary page that shows which invoices posted after you use the "Post Monthly Invoices" screen.
- ESC Version 11 is now compatible with Peachtree 2011.
- Version 11 work with the new HST Canadian tax.
- History and billing codes can now be up to 36 characters long, and you can make them inactive.
- There is a new billing code type called "Agreement" that maps to the Agreement column on the sales reports.
- Version 11 supports job classes in the ESC Mobile Client and ESC Front Office.
- We improved grouping to the layout designers, making it easier to create custom layouts.
- When you modify parts on an invoice that post to equipment, it automatically updates the information in the Equipment tab in the customer's information screen.
- The inventory module now has spell check and date\time stamp for the Inventory Entry Notes tab.
- Also, inventory part adjustments are now date sensitive.