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## Download and Installation of HVAC Remote

Follow these steps to install the program on your Windows computer. This consists of two processes.

1. The first process will be to download the setup file from the [www.is2software.com](http://www.is2software.com) website.

Download your file to a directory on your machine and please remember the directory in which you stored the setup file. A good practice is to setup a \Download directory on your machine for all downloads and create subdirectories for the different programs, etc. that are downloaded.

2. The second process will be to run the program setup executable ( Setup\_Hvac\_Remote.exe ) on your workstation to install the software.

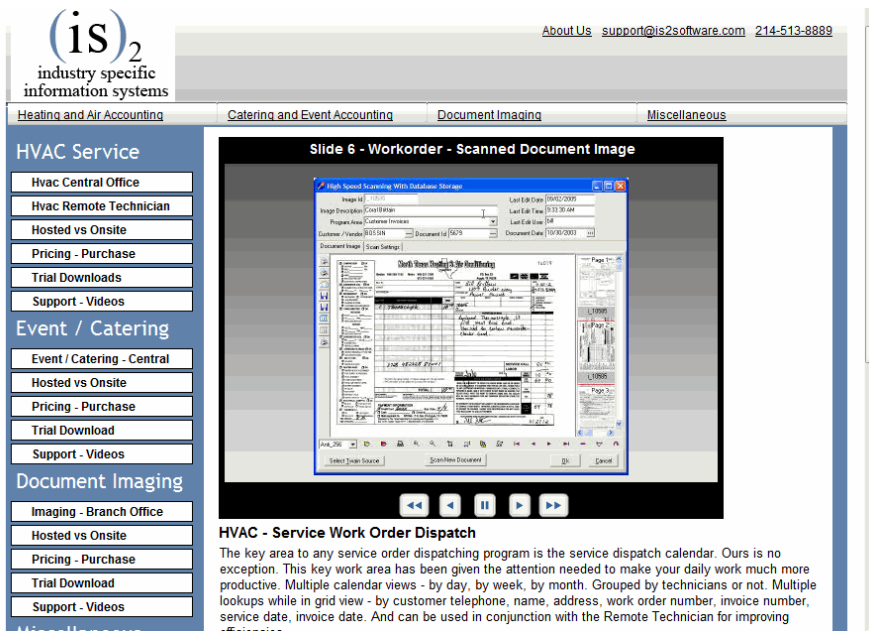
The application software and database are installed on your workstation. All data will be located on your computer. Most will install on a tablet PC that can be carried in the field with you.

The data on your remote technician is refreshed from the data located on our servers here in Dallas, Texas. The service orders for the remote technician are pulled from the database for your company. After you enter new data about the service call on your tablet pc, then you will upload the data back to the central host database.


Updates for the program are periodically made available as modifications and additions to the program take place. An update availability screen is shown when first entering the program if a new update is available.

### To download the HVAC Remote Technician software:

1. Download the HVAC Remote Technician Edition from the [www.is2software.com](http://www.is2software.com) website. At the homepage, choose the Hvac Service - Trial Downloads link on the left side of the home page.



2. You will be directed to the Hvac Accounting downloads screen. Click on the **Hvac Remote Technician - Setup Program** link.


[About Us](#) [support@is2software.com](mailto:support@is2software.com) 214-513-8889

[Heating and Air Accounting](#)
[Catering and Event Accounting](#)
[Document Imaging](#)
[Miscellaneous](#)

### Hvac Program Downloads

[Hvac Central Office](#)  
[Features](#)  
[Hvac Remote Technician](#)  
[Hosted vs Onsite](#)  
[Pricing - Purchase](#)  
[Trial Downloads](#)  
[Support - Videos](#)

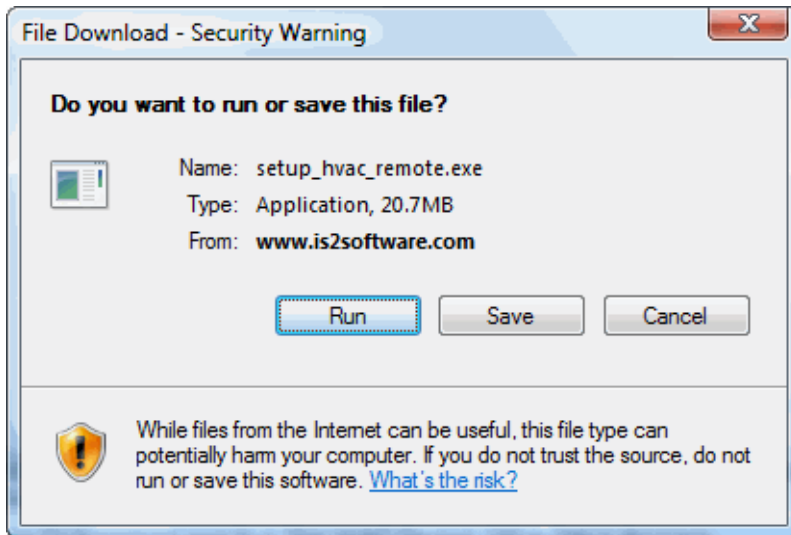
You may download a fully operational copy of the HVAC Central program and Remote Technician program to determine if the programs fit your company's needs.

There is no time limit placed on the executables. The only limitation is that you will only be connecting with our datacenter in Dallas, Texas to the HVAC Sample company to access and store your data.

A word of caution. With your testing, you will be viewing and entering data that will also be viewed by other companies wishing to perform a trial test. So please do not enter sensitive data that you do not wish other companies to see.

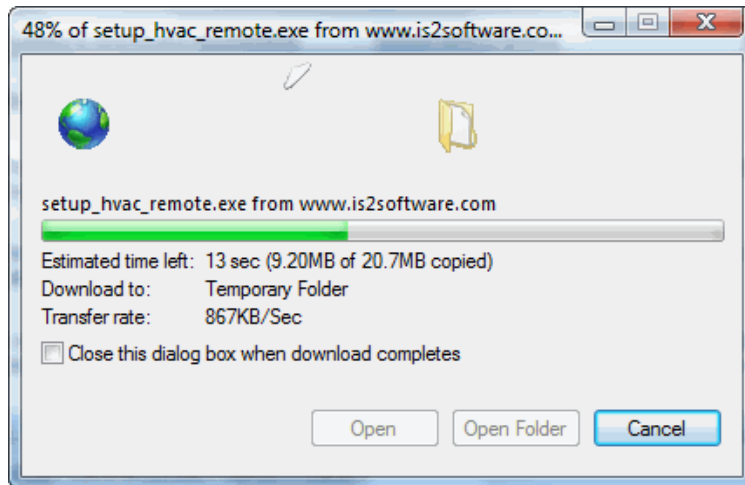
Application Program To Download	Version Date
<a href="#">HVAC Central Office - Setup Program</a>	2009.9.29.1
<a href="#">HVAC Central Office Update Program - Setup Program</a>	2009.9.10
<a href="#">How To Download and Run The HVAC Central Office Setup Program</a>	
<a href="#">HVAC Central Office - Executable Only</a>	2009.9.29.1
<a href="#">HVAC Remote Technician - Setup Program</a>	2009.9.29.5
<a href="#">HVAC Remote Technician Update Program - Setup Program</a>	2009.9.10
<a href="#">How To Download and Run The HVAC Remote Technician Setup Program</a>	
<a href="#">HVAC Remote Technician - Executable Only</a>	2009.9.29.5

3. Choose the Run option on the File Download dialog. This will start an immediate download to a temporary file area where and then begin the installation setup.



If you choose the Save This Program to Disk option on the File Download dialog. Follow the onscreen directions to download the program setup file. The options shown are different between the multiple versions of Windows. Choose the Save option. Do not check the option to close the dialog box after the download completes if this option is available. If it is checked, you will not be able to continue without finding the downloaded file on your drive. Remember where you download the setup file. Best practice is to create a \Downloads directory on your Drive C or Drive D and download all install setup programs into that directory where you will know where to find them. Do not save setup files onto the computer desktop.

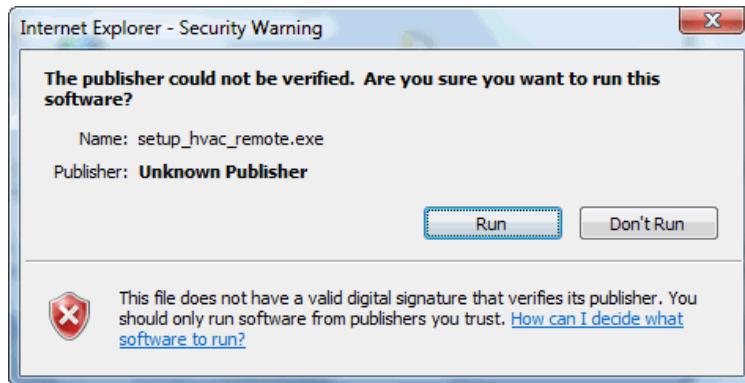
5. The transfer screen will show the progress of the file download. While transferring, make sure the "Close this dialog box when download completes" is not checked, if this dialog box shows on your screen. It makes the install simpler if you can run the setup program immediately after you download.



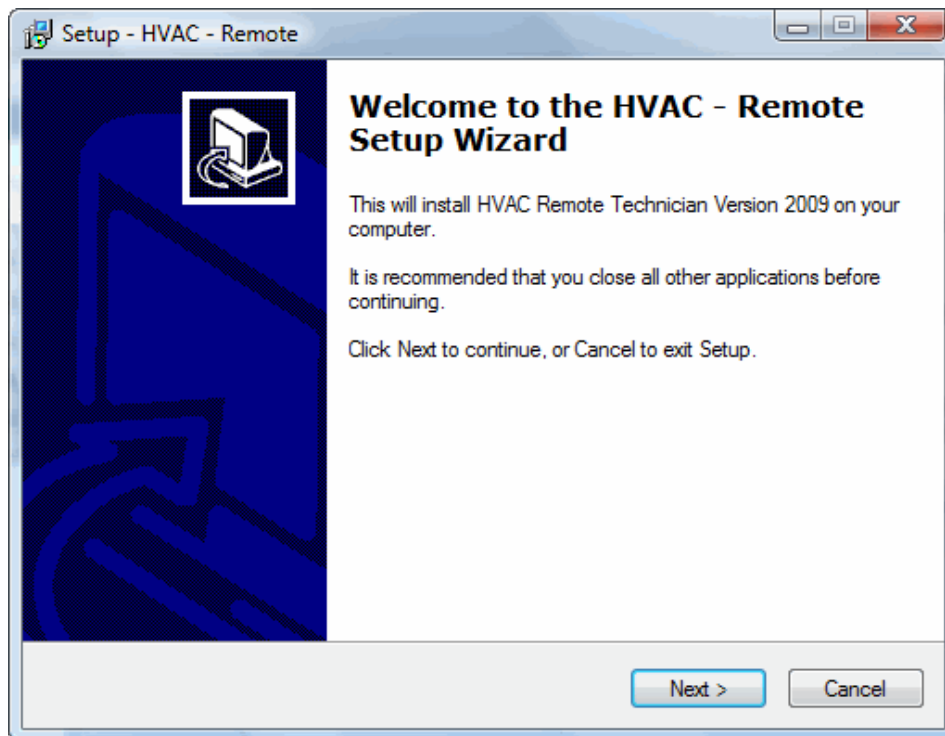
### To install the HVAC Remote Technician software:

When the download of the setup program is complete, click on the Run button to start the installation program.

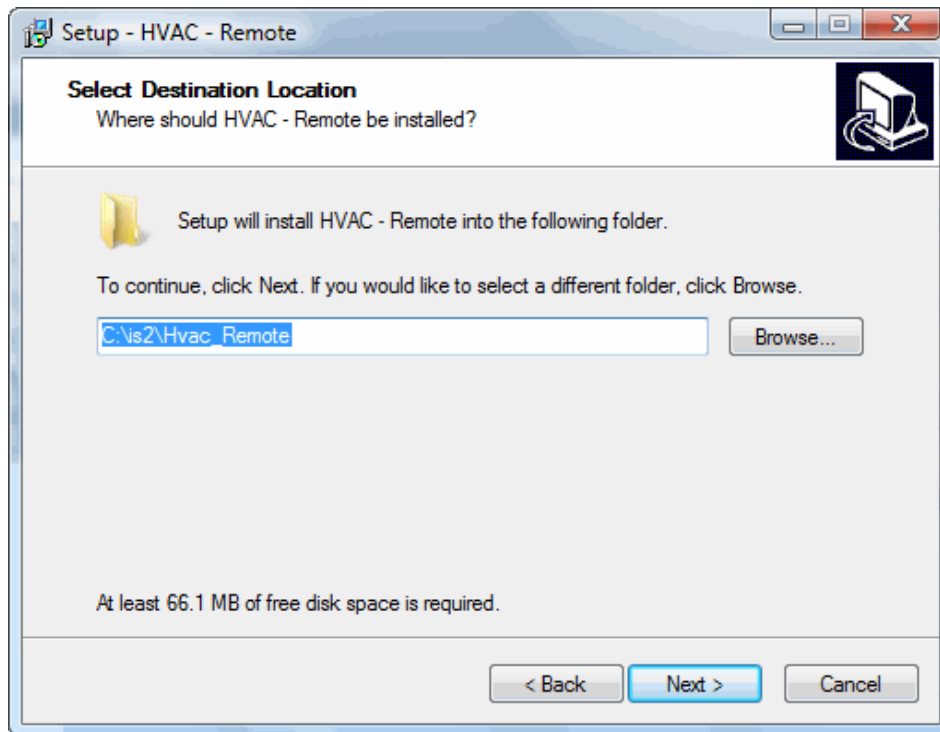
Some browser download dialogs do not show the Run button, if you have checked the checkbox to close the dialog automatically. If the Open button is not shown, remember where you downloaded the setup file, and then go to that directory to run the setup executable.



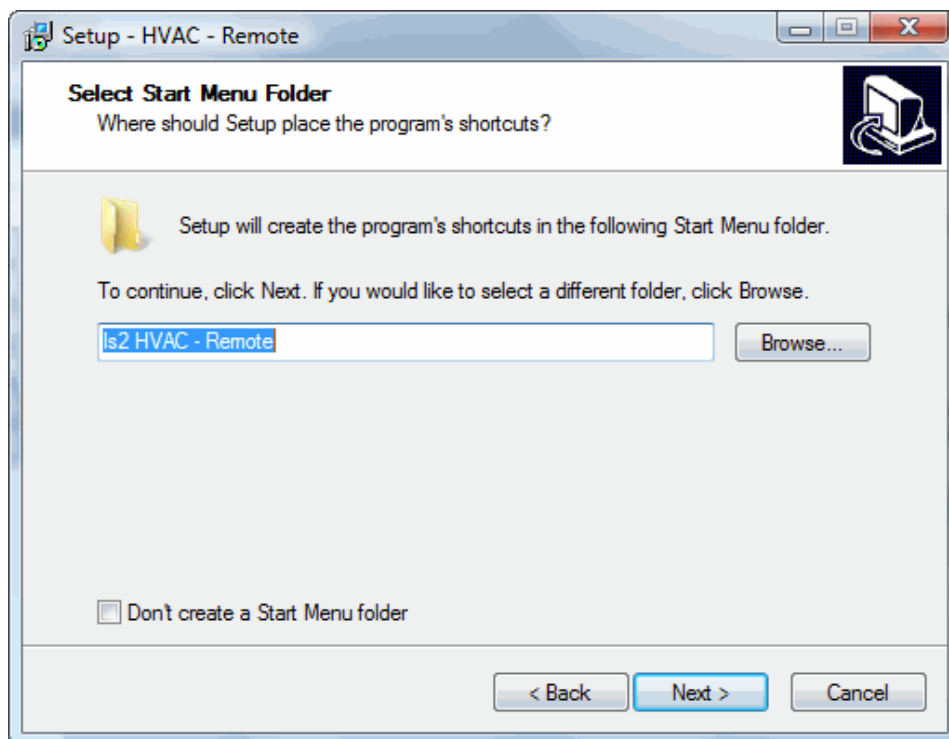
The install program will now start and guide you along the software setup process.

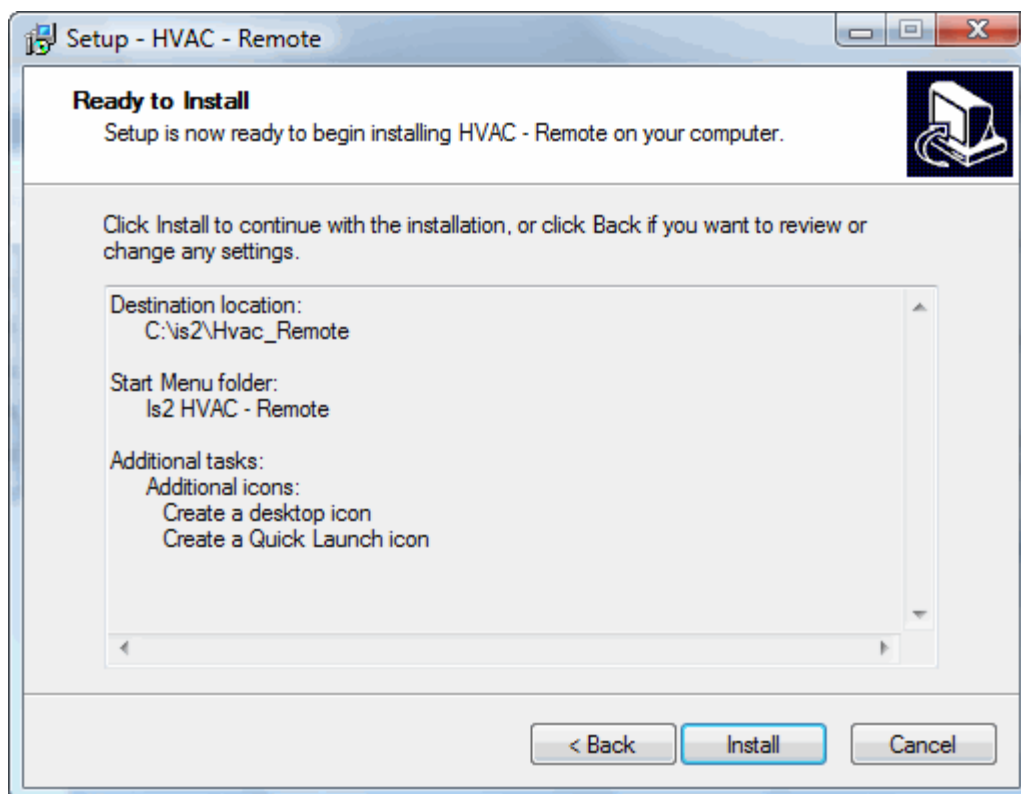
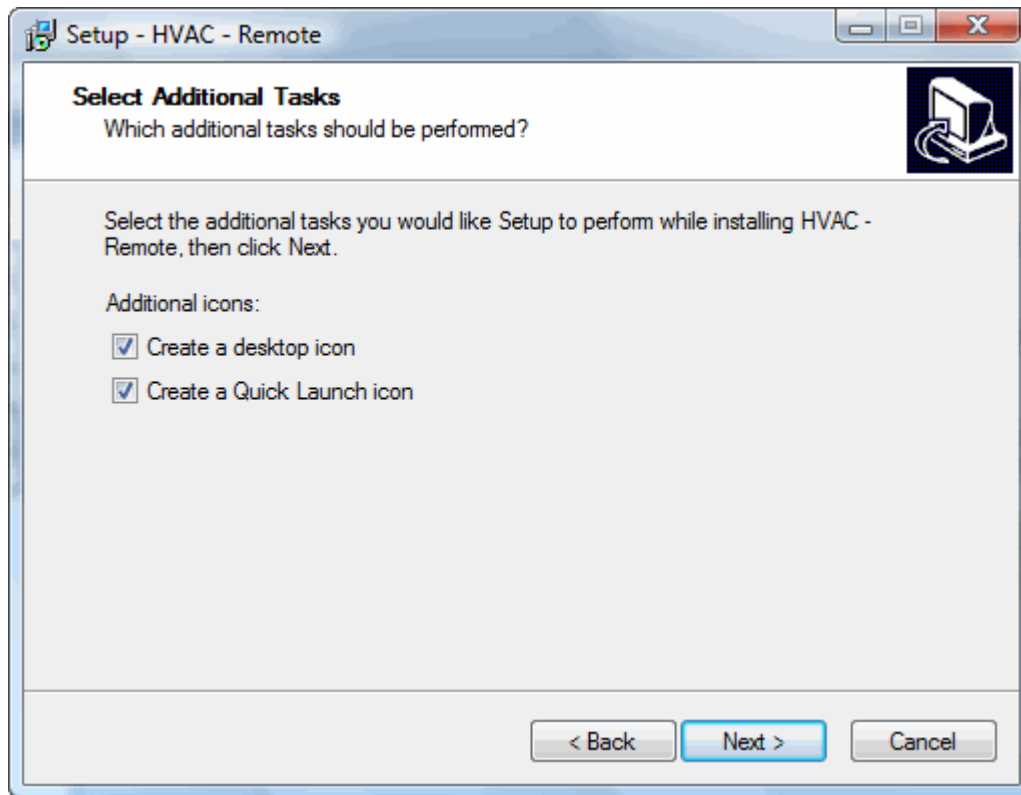


8. Choose where you wish the Remote Technician software to be installed. The default is "C:\Is2\Hvac\_Remote" directory.

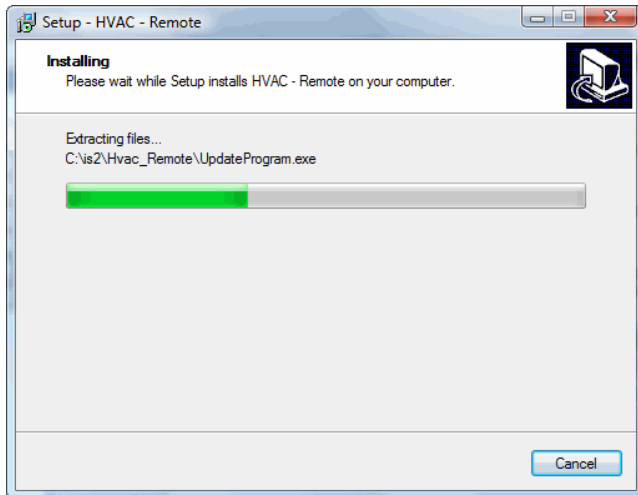


9. Once the install directory has been chosen, the install is ready to begin.

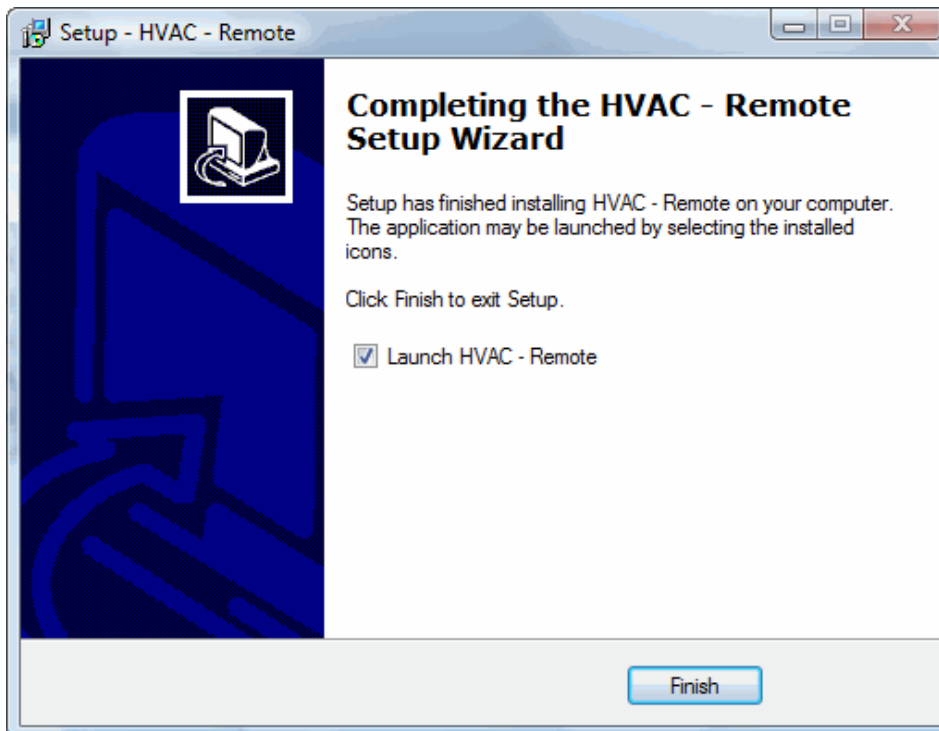




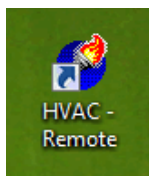
10. The files for the program will now be installed to the designated directory.



11. When finished, a completion screen will appear. You may start the HVAC Remote program from here if you wish.



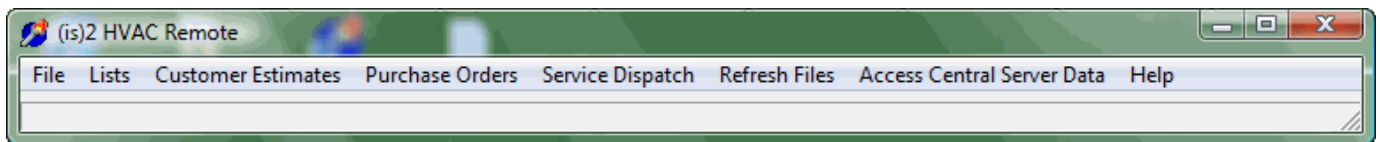
12. From your computer's Start button, select the Programs menu, go to Is2 Software, and then choose the Hvac Remote Technician. Or just choose the desktop shortcut that was created.



13. When starting, you will see this screen appear as the database is loading.



13. The main menu will appear for the Hvac Remote Technician program.



14. If the main menu appears, the program should be functioning properly.

15. You are now ready to get started. Proceed now to setting up your remote parameters. There you will enter your proper technician and truck id's, company printing information, and your login information into your company's central database files.

## Instructions for downloading and installing the new Update Program.

There is a new update program which uses a ftp transfer protocol instead of http so we do not have to deal with the http security measures enacted with the latest Windows update service packs.

1. Go to the website. [www.is2software.com](http://www.is2software.com)
2. Choose the HVAC – Trial Downloads page.

**Hvac Program Downloads**

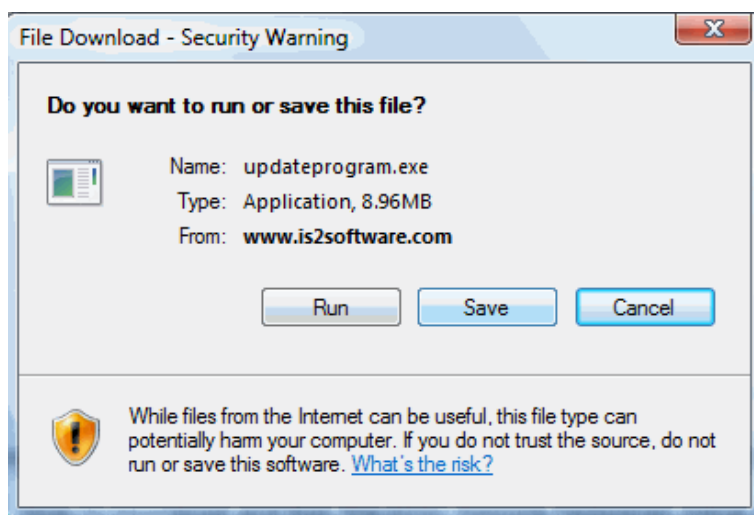
You may download a fully operational copy of the HVAC Central program and Remote Technician program to determine if the programs fit your company's needs.

There is no time limit placed on the executables. The only limitation is that you will only be connecting with our datacenter in Dallas, Texas to the HVAC Sample company to access and store your data.

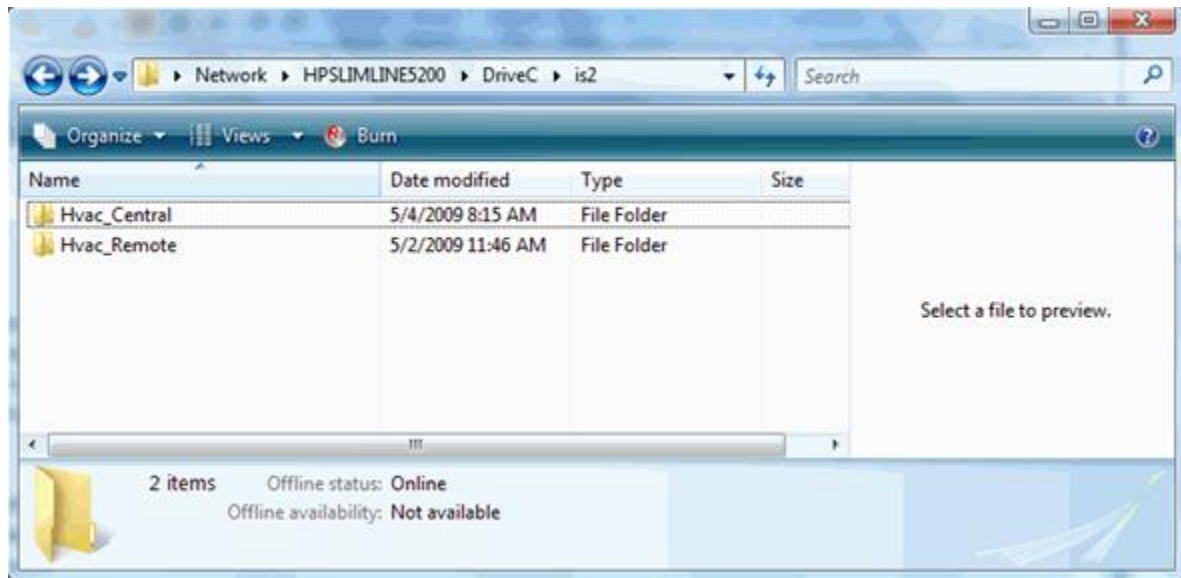
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Application Program To Download	Version Date
<a href="#">HVAC Central Office - Setup Program</a>	
<a href="#">How To Download and Run The HVAC Central Office Setup Program</a>	
<a href="#">HVAC Central Office - Executable Only</a>	
<a href="#">HVAC Remote Technician - Setup Program</a>	
<a href="#">How To Download and Run The HVAC Remote Technician Setup Program</a>	
<a href="#">HVAC Remote Technician - Executable Only</a>	
<a href="#">Update Program - Executable Only</a>	
<a href="#">Remote Control Program - Executable Only</a>	

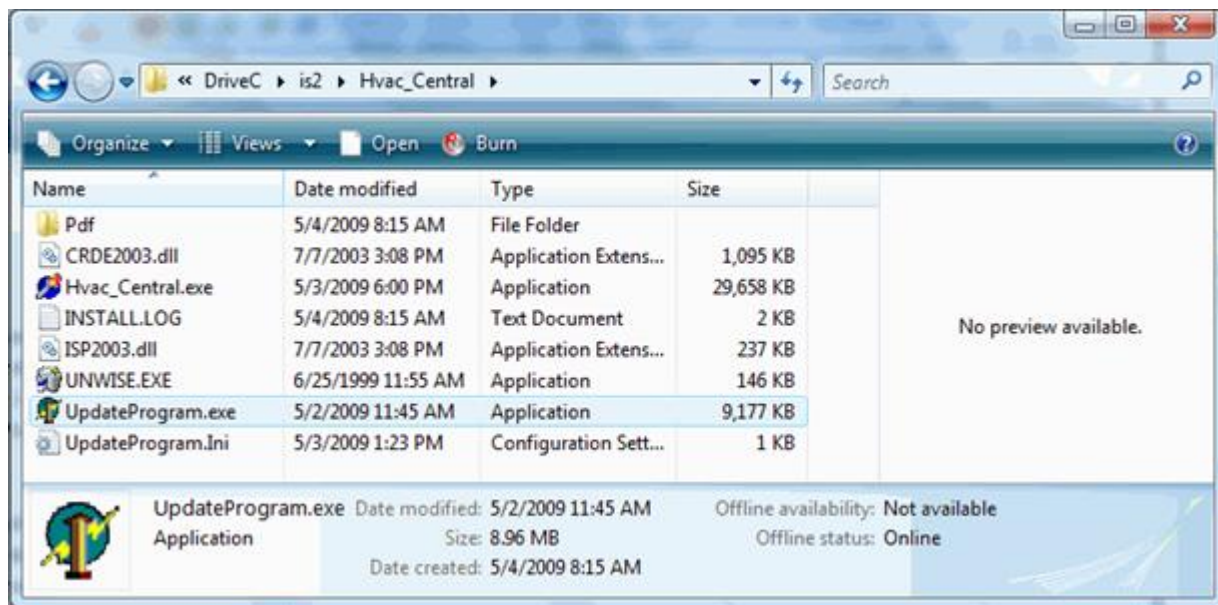
3. On the HVAC Downloads page, click on the Update Program – Executable Only which is at the bottom of the page.
4. A run or save file dialog box will appear. Choose the Save button to save the file to your local drive.



5. You will need to save the file to the directory where the Is2 HVAC Central or HVAC Remote was installed. Normally, this is in the \Is2\Hvac\_Central for the Central program and \Is2\Hvac\_Remote for the Tech Remote program.



6. If you have both installed, save the Update Program to both directories. You will be asked if you wish to overwrite the existing program with the new one. Answer Yes.



The Update Program is normally run from the Help – Run Update Program menu option but it can also be run by itself.

For each program, the Update Program uses a different set of parameters for the downloading of the appropriate updates.

A separate email will be sent to explain how to run the Update Program for each program.

## Instructions for updating the HVAC Remote program.

1. You may update the Hvac Remote program either by choosing the Help – Run Update Program or by running the Update Program from the HVAC Remote directory where it is installed.
2. The Update Program screen will appear. Please fill out the Host Address, Login User Name, and Login Password to be the same as appears below. The Application and Remote File name should match the program that you will be updating – in this case – Hvac\_Remote.Exe. The local file will be generated internally based on the directory where the Application file is located.

(IS)2 Update Program

File Action Options

File Information Transfer Trail

Connection Information

Host Address is2software.net

Login User Name hvacupdate

Login Password hvacupdate

File Information

Application Hvac\_Remote.Exe

Remote File Hvac\_Remote.Exe

Local File C:\is2\Hvac\_Remote\Hvac\_Remote.Exe

Remote File Date Remote File Size

Local File Date Local File Size

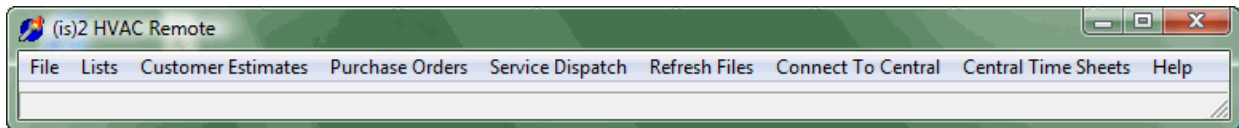
Check For New Update Download New Program File Close

3. Click on the Download new Program File button to start the download of the newest update. On the first run, you may need to answer to the question from Windows to Unblock the application to allow the transfer to occur. The application executable file will be overwritten with the new file.
4. A progress bar will show at the bottom of the screen as the download occurs.
5. Close the update program and click on the Hvac Remote icon to start the application with the new update.

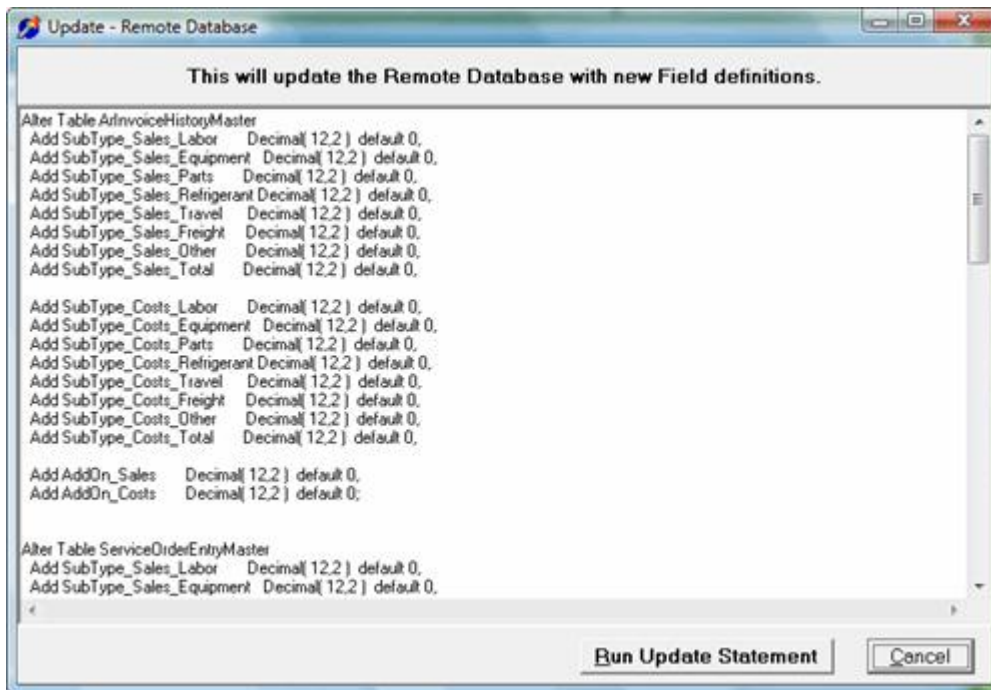
## Running Database Update for the HVAC Remote

After updating the Hvac Remote to Version 2009.5.2.3, a process must be run after you start the Hvac Remote for the first time.

1. From the main menu, choose File – Update Remote Database.



2. This screen will appear.



3. Click on the Run Update Statement button at the bottom right. This will run the sql script that will update the Remote database with the new field definitions needed.
4. Close the screen and you are ready to use the new update.



## Getting Started – Enter the Remote Parameters

If the main menu appears, the program should be functioning properly.

The first process that should occur after the program is first installed is to set up the remote parameters screen. This is the first menu option under File off the main menu.

The parameters needed to properly operate the program are sent to you in a separate email containing all your login data if you are running the Hosted version. If not Hosted, your office manager will provide your necessary login data.

This screen has four tabs of information that will need to be filled out. Each remote technician operating for your company should have unique estimate, purchase order, and invoice pad numbers. Just as if they were usually manual pads.

The invoice pad numbers are setup on the Central side and pulled each time the Technician syncs in the service dispatch area.

The first tab is the Basic Company Information.

Company Parameters - HVAC Remote

Basic Company Information | Email / Login Parameters | Purchase Orders | Update Login

Company Name

Company Name: Industry Specific Hvac Remote

Address Line 1: 1301 W. Hwy 407 Suite 201-359

Address Line 2: Lewisville, Texas 75067

City, State Zip Code: License # TX987-123456

Document Entry Parameters

Next Estimate Number: 750010

Next Work Order Number: 750001

Calculate Sales Taxes Based On: Item Price

Default Tax Code: TX-DALLAS

Remote Technician Id: JW

Remote Truck Id: JW

Default Printer Selection

Default Printer for Work Orders: Default

Default Printer for Estimates: Default

Ok Cancel

The Remote Technician Id is the one of the Technician identifier used on the Central side for dispatching to that particular technician.

The Remote Truck Id is the Truck Inventory truck identifier that has been assigned to this technician as his truck inventory.

The Next Work Order Number is no longer being used and will soon be removed from the screen.

The next Invoice number available is picked up from the Invoice Pads table that is updated from the Central database on each synchronization unless unchecked.

The second tab is the Email / Login Parameters.

The screenshot shows a Windows-style dialog box titled "Company Parameters - HVAC Remote". It has four tabs: "Basic Company Information", "Email / Login Parameters" (which is selected), "Purchase Orders", and "Update Login".

Under the "Email / Login Parameters" tab, there are two main sections:

- Central Server Login Parameters:** This section contains several text input fields:
  - User Id: hvacguest
  - User Password: hvacguest
  - Host Address: is2software.net
  - Host Port: 12000
  - Central Database Name: Sample\_Hvac
  - Company Login Id: hvac\_host
  - Company Login Password: hvac\_host
- Email Option Defaults:** This section contains several text input fields:
  - Mail Server: mailserver.address
  - From: user@company.com
  - Email Account Id: user\_account\_number
  - Email Account Password: user\_account\_password

At the bottom right of the dialog box, there are two buttons: "Ok" and "Cancel".

The Central Server login is the login for this technician into the Central application server.

The Email options are the same as if the technician was using his Outlook or similar email programs.

The third tab is the Purchase Orders information.

Company Parameters - HVAC Remote

Basic Company Information | Email / Login Parameters | Purchase Orders | Update Login

Purchase Order Company Information

Company Name: Industry Specific Hvac Remote P.O.

Address Line 1: 1301 W. Hwy 407 Suite 201-359

Address Line 2:

City, State Zip Code: Lewisville Tx 75077

Contact: Bill Brittain

Telephone: 214-513-8889

Email Address:

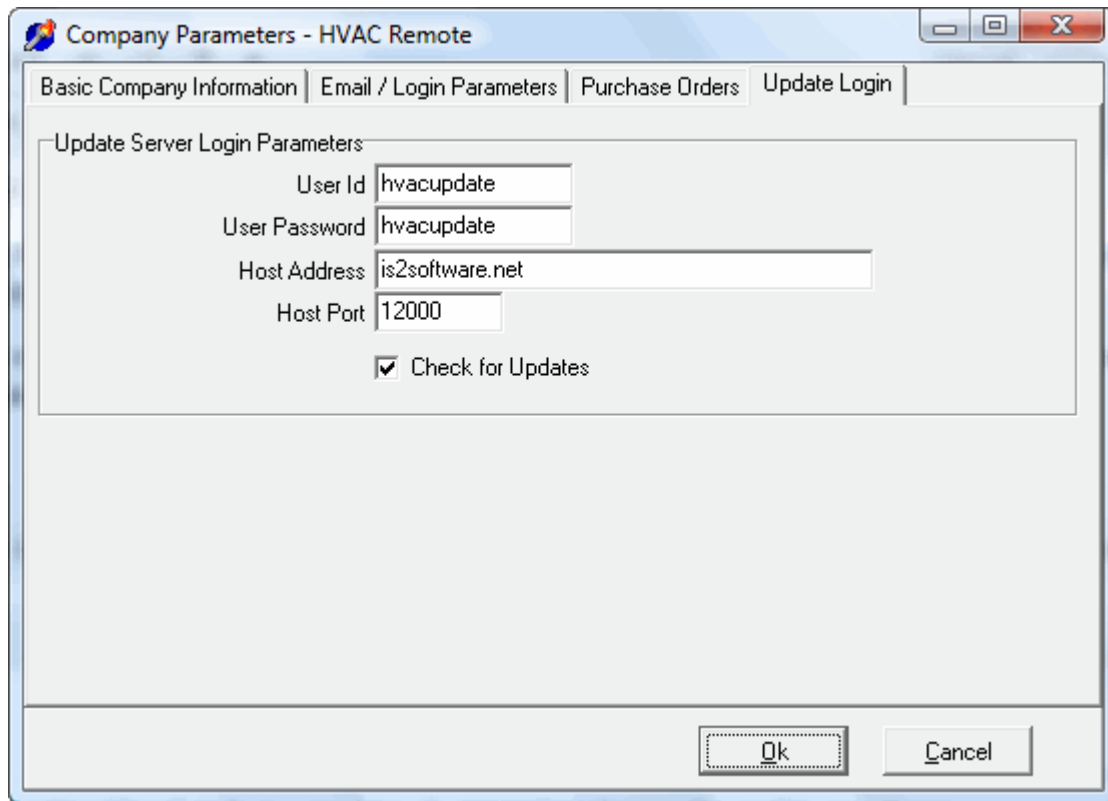
Next Purchase Order: 750013 System Document Control Number: 70

Ok Cancel

The purchase order information is the company information to be printed on a purchase order by the technician.

Each technician should be given a starting purchase order number which will not overlay with another technician or the Central purchase order numbers as they are being used.

The fourth tab is the Update Login information.



This screen is new to the 2010 versions. You will more than likely not have to change this screen.

The information needed consists of the user id, user password, the host computer ip address, and the host computer port for your login into the is2 software hvac update server.

You should make sure that the Check for Updates checkbox is checked if you wish to automatically check for updates upon starting the HVAC Remote program.

Uncheck this entry if you are having problems in connecting to the Is2 Software update server or just simply wish to check for updates manually.

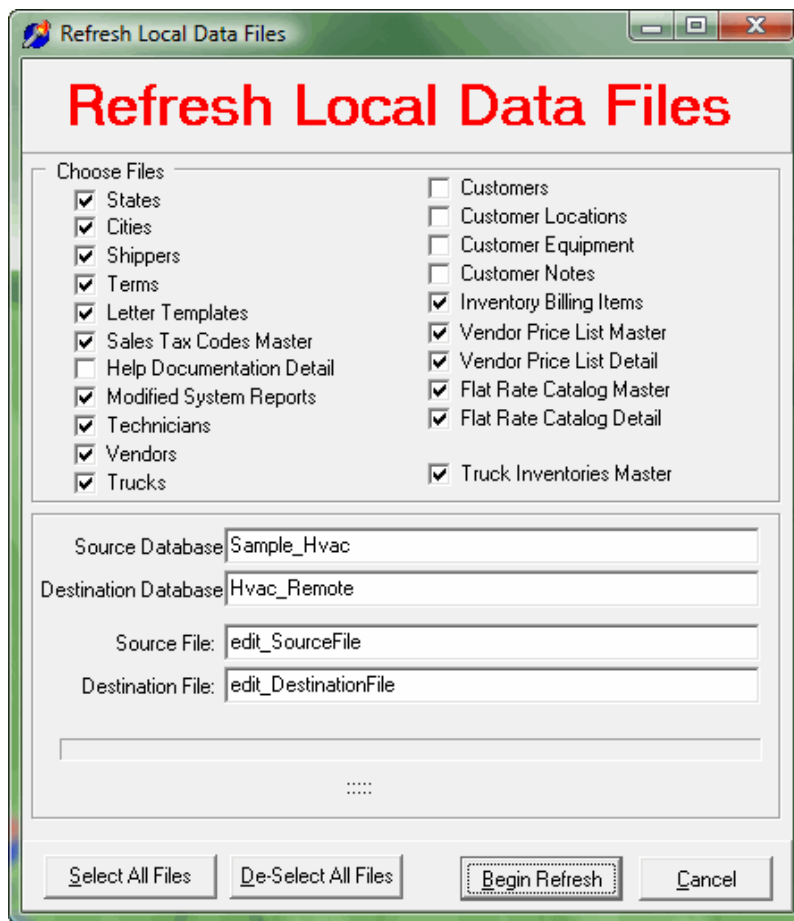
## Getting Started – Pulling Initial List Files

You now have enough information for the program to be able to connect to your central datastore and then pull data for use in the program.

For first time installations, it is necessary to pull the data files that will normally not change very often, such as the terms, inventory, sales tax codes, etc.

Customer information is pulled for each workorder that is dispatched to the remote along with the invoice history for that customer. This customer information is pulled at the point of the service dispatch synchronizations.

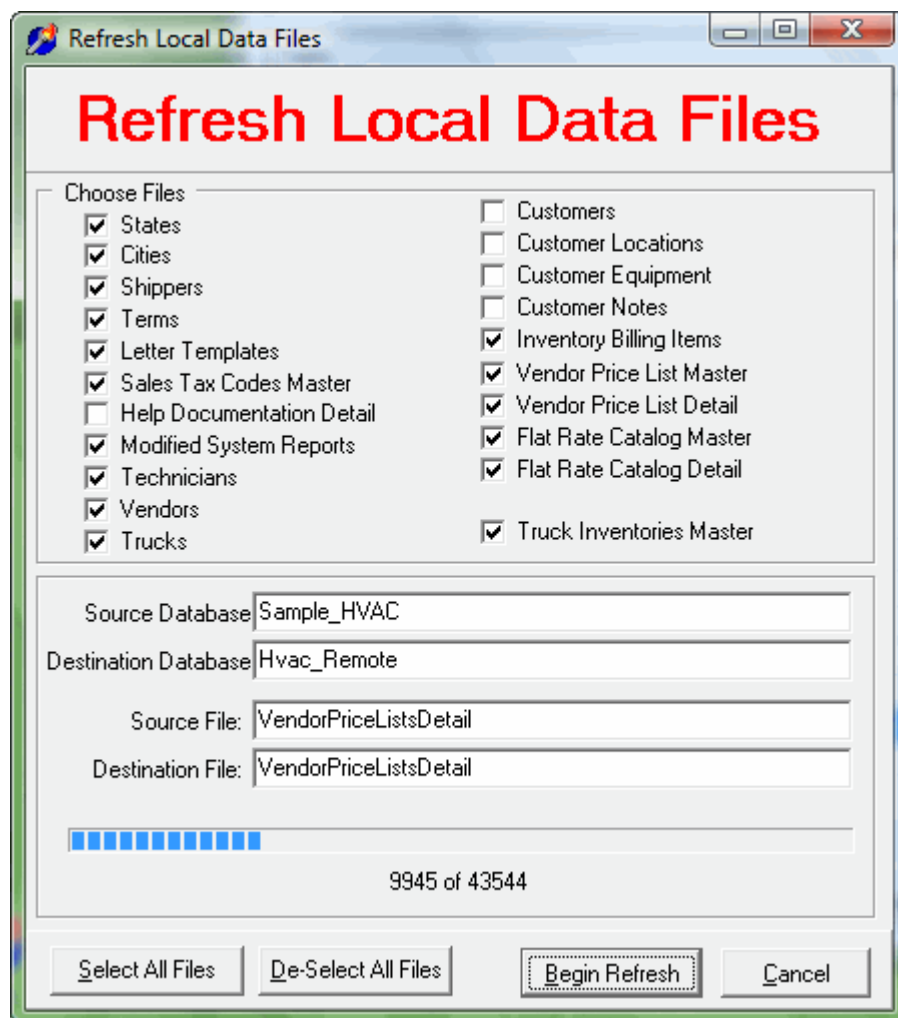
You will use the Refresh Files option on the main menu to accomplish this.



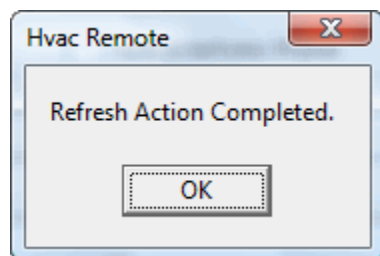
When entering into this screen for the first time, you may see the Connect to Server screen which will begin the communications to your company central database.

These are lists such as Vendors, Inventory, Flat Rate Catalog items, etc which are used to enter information in Purchase Orders, Estimates, and Service Orders.

Showing the progress bar as the records are downloaded from the Central server.



When completed this dialog will show.



Once your primary entry list files have been initialized, the technician is ready to pull his workorders from the central datastore dispatch.

## Getting Started – The Sync Process - Pulling Tech Workorders

You will go to the main work area of the program, the Service Dispatch area off the main menu.

Here you will click on the Synchronize Workorders With Office button to send workorders from the remote and pull workorders from the central.

Remote Technician Dispatch - JW

Work Order Entry | Print Quick Report | Work Order Reports | Design Printouts | Maps | Calendar View | Exit

Dispatch - Grid View | Dispatch - Calendar View

☒ All Work Orders  
☐ Incomplete Orders Only  
☐ Complete Orders Only  
☐ Disable Dispatch Colors

☐ Orders with Invoice Numbers  
☐ Orders Marked To Be Posted  
☐ Orders Marked as Callbacks  
☒ Show Work Order Memos

☐ Show Only for Selected Date

**Synchronize Workorders With Office**

March, 2010

S	M	T	W	T	F	S
28	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	31	1	2	3

Base Service Information

Priority	Service Date	Service Time	Service Name	Service Address	Service City	Dispatch Time	Completion Time
<No data to display>							

Date: [ ] Time: [ ] Duration: [ ] Dispatch: [ ] Arrived: [ ] Finished: [ ]  
 Name: [ ] Tech: [ ]

Count: 0

Scheduled | Dispatched | Not Dispatched - OverDue | Arrived at Job Site | Job completed | Priority Call - Red Border

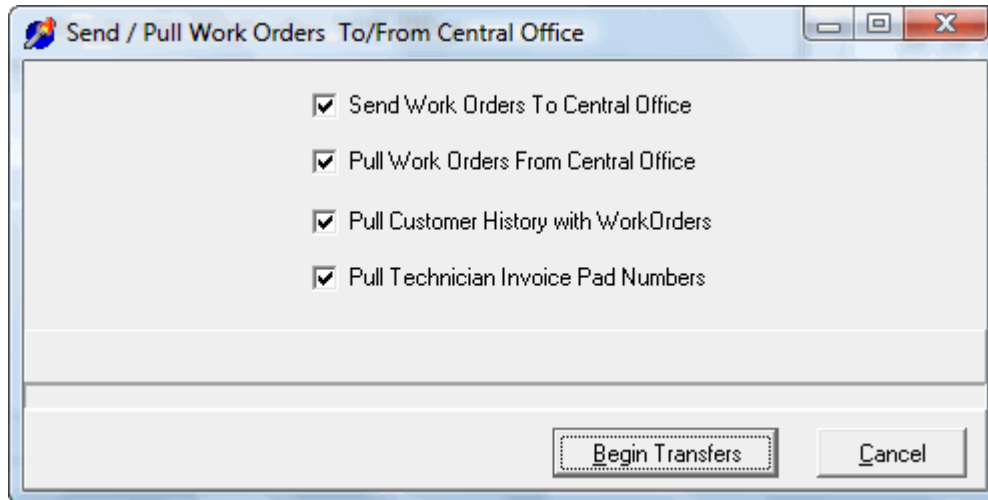
Print Work Order Request | Print Completed Work Order | Email Invoice | Print Invoice | Edit Workorder | Close

When workorders are pulled from the central datastore, customer histories are also pulled for each workorder based on the customer id on the workorder. This will help the technician to be able to view customer invoice histories, customer contracts, and customer notes while he is on the job site.

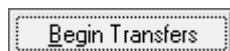
Click on the Synchronize Workorders With Central Office button in the middle top of the Dispatch – Grid View screen to both send and pull workorder, plus get customer histories for the current workorders, and get the changes on the Central side of the technician's invoice pad allotments.

**Synchronize Workorders With Office**

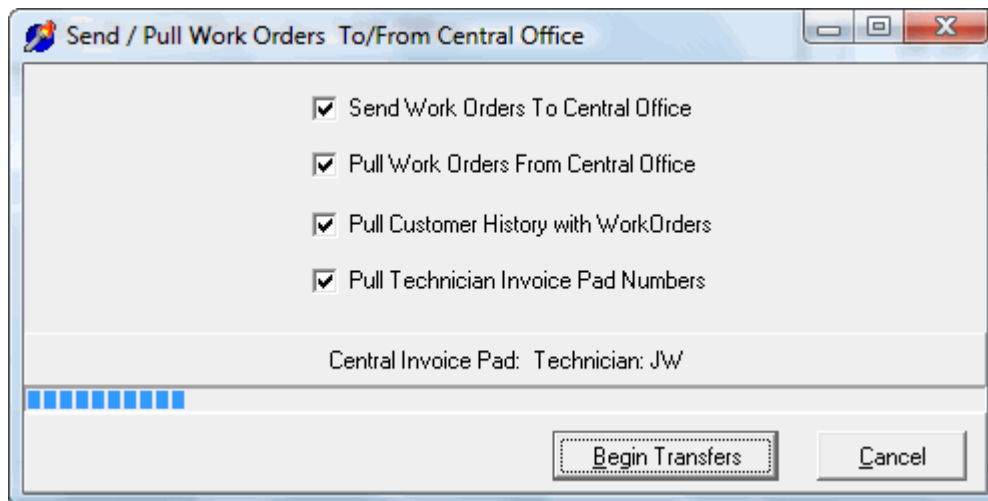
A screen will appear where you can deselect certain upload / download options.



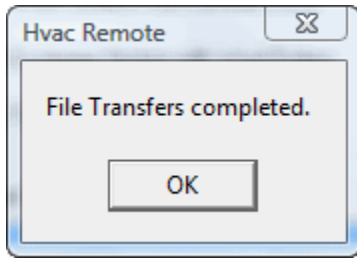
Click on the Begin Transfers button to begin the process.



You will see a progress bar as the documents are downloaded and uploaded to the Remote program.



When completed, a dialog box will appear showing that the process is finished.



After synchronizing you will see the workorders for the technician.

The pull of workorders is based on the Technician Id. entered in the Remote Parameters and the Technician Id. that was entered on the Central work order.

Also taken into account are the new Remote Checkout option – Remote Checkout Allowed should be checked on the Central side, and the work order has not been marked as Completed By Remote.

When a workorder is marked Completed By Remote on the workorder, the workorder is deleted from the Remote Technician side after it updates the Central side.

Note:

You may send technicians a blank workorder and let the technician fill out all information in the field. This is useful for weekend emergency calls or if the company allows the technician to create estimates and then immediately perform the work if authorized.

A TBUL work order that has no customer name or address. This is a To Be Used Later workorder. Since workorders have to originate from the Central program, this is a way for technicians to have available workorders to work up a new order if they are dispatched without communicating directly with the Central program. These are entered yourselves and you certainly do not have to provide these to your technicians.

A technician cannot create a new workorder on his own while in the field.

## Getting Started – The Service Dispatch Area

You will go to the main work area of the program, the Service Dispatch area off the main menu.

The technician can enter service ticket data, print a service ticket, a completed workorder, and a customer invoice. A customer signature can be captured on the tablet pc with the tablet pen or if using a laptop, by using the mouse.

Invoice numbers are pulled from the Invoice Pads table which is synchronized with the Central Invoice Pad area. On the Central side, the invoice pads table is updated upon posting of the service order as invoices.

The Service Dispatch screen has two main tabs for viewing the dispatched work orders.

This is the Dispatch – Grid View. This is a listing style view with options for the technician to filter the workorders that he sees. Example: All, just the Incomplete Orders, or just the Completed Orders, or Order that are Callbacks. Orders can be shown just for the calendar date selected or all orders. There is a memo area on the bottom of the screen that can be disabled if this information is not needed.

Remote Technician Dispatch - JW

Work Order Entry | Print Quick Report | Work Order Reports | Design Printouts | Maps | Calendar View | Exit

Dispatch - Grid View | Dispatch - Calendar View

☒ All Work Orders  
☐ Incomplete Orders Only  
☐ Complete Orders Only  
☐ Disable Dispatch Colors

☐ Orders with Invoice Numbers  
☐ Orders Marked To Be Posted  
☐ Orders Marked as Callbacks  
☒ Show Work Order Memos

☐ Show Only for Selected Date

**Synchronize Workorders With Office**

March, 2010

S	M	T	W	T	F	S
28	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	31	1	2	3

Base Service Information

Priority	Service Date	Service Time	Service Name	Service Address	Service City	Dispatch Time	Completion Time	Tech
<No data to display>								

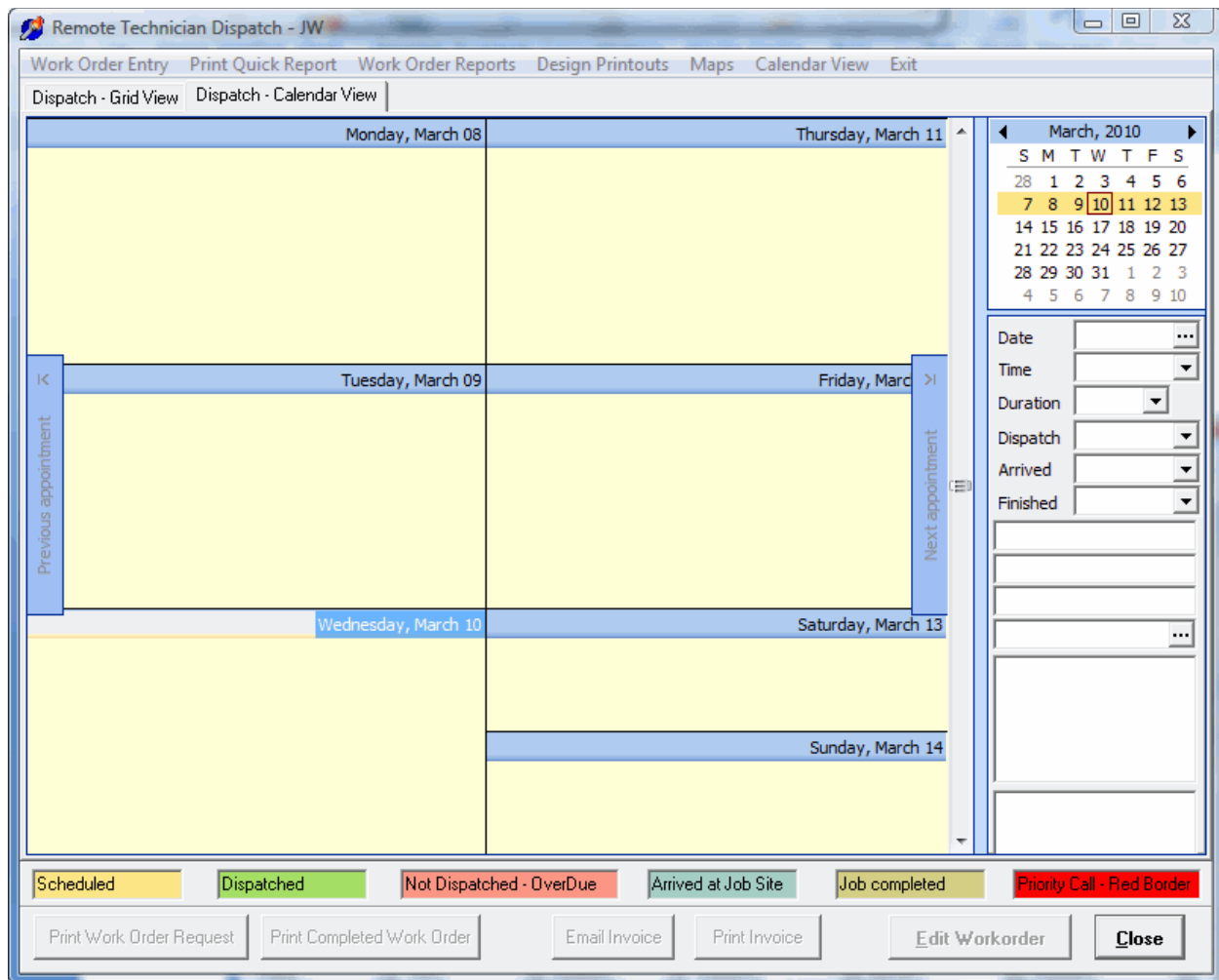
Date: [ ] Time: [ ] Duration: [ ] Dispatch: [ ] Arrived: [ ] Finished: [ ]  
 Name: [ ] Tech: [ ]

Count: 0

Scheduled | Dispatched | Not Dispatched - OverDue | Arrived at Job Site | Job completed | Priority Call - Red Border

Print Work Order Request | Print Completed Work Order | Email Invoice | Print Invoice | Edit Workorder | Close

This is the Dispatch – Calendar View area. Here the technician can see the day or week view as an Outlook Calendar styled view with service appointment times lined up for the day.



Go to the Service Dispatch area of the manual to learn more about editing and printing your work orders.

## Service Dispatch

The Service Dispatch browse screen will be your main work area – to pull work orders dispatched to your technician id, for editing work orders, printing work orders as invoices, and sending back the completed work order to the central office.

Remote Technician Dispatch - JW

Work Order Entry | Print Quick Report | Work Order Reports | Design Printouts | Maps | Calendar View | Exit

Dispatch - Grid View | Dispatch - Calendar View

☒ All Work Orders
 ☐ Orders with Invoice Numbers  
☐ Incomplete Orders Only
 ☐ Orders Marked To Be Posted  
☐ Complete Orders Only
 ☐ Orders Marked as Callbacks  
☐ Disable Dispatch Colors
 ☒ Show Work Order Memos
 ☐ Show Only for Selected Date

**Synchronize Workorders With Office**

Base Service Information

Priority	Service Date	Service Time	Service Name	Service Address	Service City	Dispatch Time	Completion Time
Y	03/15/2010	11:30 am	WILBUR JOHNSTON	1824 WILSON	Dallas	08:20 am	

Count : 1

Date: 03/15/2010 Time: 11:30 am Duration: 1.0 Hour Dispatch: 08:20 am Arrived: 11:20 am Finished:   
 Name: WILBUR JOHNSTON 1824 WILSON 214-742-4198 Tech: John Wayne   
 Heater out. Kids in house with nanny. Beware of the German Shepard in side yard. Replaced breaker and portion of wiring. Rat had chewed electrical line.   
 Save

Scheduled Dispatched Not Dispatched - OverDue Arrived at Job Site Job completed Priority Call - Red Border

Print Work Order Request Print Completed Work Order Email Invoice Print Invoice Edit Workorder Close

Work orders are pulled from the Central Office server by clicking on the Synchronize With Office button in the top middle of the screen.

## The Sync Process - Pulling Tech Workorders From The Central Office

To pull your work orders from the Central server, go to the Service Dispatch area from the main menu.

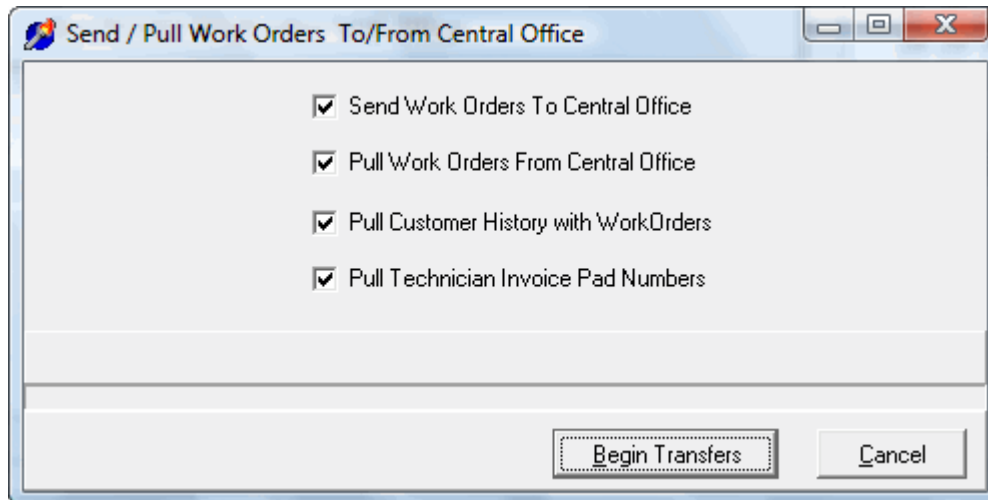
Here you will click on the Synchronize Workorders With Office button to send workorders from the remote and pull workorders from the central.

When workorders are pulled from the central datastore, customer histories are also pulled for each workorder based on the customer id on the workorder. This will help the technician to be able to view customer invoice histories, customer contracts, and customer notes while he is on the job site.

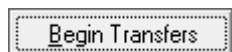
Click on the Synchronize Workorders With Central Office button in the middle top of the Dispatch – Grid View screen to both send and pull workorder, plus get customer histories for the current workorders, and get the changes on the Central side of the technician's invoice pad allotments.

## Synchronize Workorders With Office

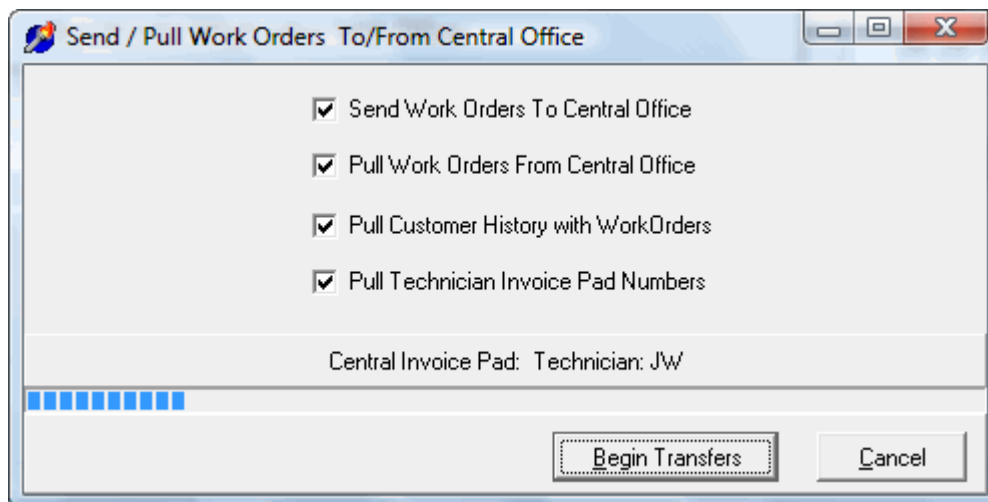
A screen will appear where you can deselect certain upload / download options.



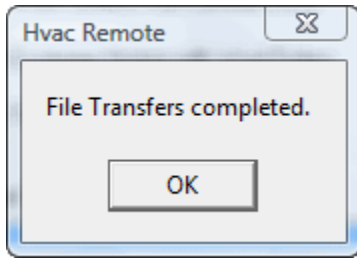
Click on the Begin Transfers button to begin the process.



You will see a progress bar as the documents are downloaded and uploaded to the Remote program.



When completed, a dialog box will appear showing that the process is finished.



After synchronizing you will see the workorders for the technician.

The workorders that are pulled from your Remote is based on the Technician Id. entered in the Remote Parameters and the Technician Id. that was entered on the Central work order.

Also taken into account are the new Remote Checkout option – Remote Checkout Allowed should be checked on the Central side, and the work order has not been marked as Completed By Remote.

A screenshot of a form with the following elements:

- A label 'Based On Estimate' above a text input field with a dropdown arrow.
- A label 'Under Contract #' above a text input field with a dropdown arrow.
- A checkbox labeled 'Callback?' which is unchecked.
- A checkbox labeled 'Complete?' which is checked.
- A checkbox labeled 'Remote Complete?' which is checked.

When a workorder is marked Completed By Remote on the workorder, the workorder is deleted from the Remote Technician side after it updates the Central side.

You may send technicians a blank workorder and let the technician fill out all information in the field. This is useful for weekend emergency calls or if the company allows the technician to create estimates and then immediately perform the work if authorized.

On the Central side, enter a TBUL ( To Be Used Later ) work order with just TBUL or whatever you wish in the Billing and Service Name and assign to the needed Technician Id. The tech can then use this blank work order as he needs.

## Editing a Work Order

To edit an existing work order, click on the Edit button at the bottom right of the screen.

Print Work Order Request	Print Completed Work Order	Email Invoice	Print Invoice	<b>Edit Workorder</b>	Close
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The work order entry screen will appear.

Work Order / Invoice Entry

**Invoice**

Order Number 376 Invoice Number 4002 ...  
Order Date 02/12/2009 ... Invoice Date 03/15/2010 ...

Bill To: WILBUR ...  
WILBUR JOHNSTON ...  
1824 WILSON ...  
Dallas ... TX ... 75904  
214-742-4198 ...

Location: ...  
WILBUR JOHNSTON  
1824 WILSON  
Dallas ... TX ... 75904  
214-742-4198 ...

Based On Estimate  
0 ...  
Under Contract #  
0 ...  
☐ Callback?  
☒ Complete?  
☐ Remote Complete?

Appointment | Parameters | Line Items | Totals | Work Instructions | Time Tracking | Equipment Covered | Imaging | P.O.

Appointment Date 03/15/2010 ... Appointment Time 11:30 am ... Priority Call ? Yes ...  
Dispatch Time 08:20 am ... Tech Arrived 11:20 am ... Tech Finished ... Map Grid Coordinates ...  
Service Type Heat ... Heat / Pump ... Region of City ...  
Technician JW ... John Wayne ... Truck ...

Customer Memo

Problem/Instructions Heater out. Kids in house with nanny. Beware of the German Shepard in side yard.

Diagnosis/Repair Replaced breaker and portion of wiring. Rat had chewed electrical line.

View Customer History Ok Cancel

The top portion show the billing and service name and address information.

There are a series of tabs across the middle of the work order entry screen.

## Appointment tab

Appointment	Parameters	Line Items	Totals	Work Instructions	Time Tracking	Equipment Covered	Imaging	P.O.
<div style="display: flex; flex-wrap: wrap;"> <div style="width: 33%;">Appointment Date: 03/15/2010...</div> <div style="width: 33%;">Appointment Time: 11:30 am</div> <div style="width: 33%;">Priority Call?: Yes</div> <div style="width: 33%;">Dispatch Time: 08:20 am</div> <div style="width: 33%;">Tech Arrived: 11:20 am</div> <div style="width: 33%;">Tech Finished:</div> <div style="width: 33%;">Map Grid Coordinates:</div> <div style="width: 33%;">Service Type: Heat</div> <div style="width: 33%;">Heat / Pump:</div> <div style="width: 33%;">Region of City:</div> <div style="width: 33%;">Technician: JW</div> <div style="width: 33%;">John Wayne</div> <div style="width: 33%;">Truck:</div> </div> <div style="margin-top: 5px;">Customer Memo:</div> <div style="margin-top: 5px;">Problem/Instructions: Heater out. Kids in house with nanny. Beware of the German Shepard in side yard.</div> <div style="margin-top: 5px;">Diagnosis/Repair: Replaced breaker and portion of wiring. Rat had chewed electrical line.</div>								

## Parameters tab

Appointment	Parameters	Line Items	Totals	Work Instructions	Time Tracking	Equipment Covered	Imaging	P.O.
<div style="display: flex; flex-wrap: wrap;"> <div style="width: 33%;">Base Sales Tax On: Item Price</div> <div style="width: 33%;">Invoice Type: Separate Item</div> <div style="width: 33%;">Customer Type:</div> <div style="width: 33%;">Work Type: RS</div> <div style="width: 33%;">Residential - Service</div> <div style="width: 33%;">Customer Tax Exempt Id.:</div> <div style="width: 33%;">Customer Terms: NET DUE UPON RECEIPT</div> <div style="width: 33%;">Customer Purchase Order:</div> <div style="width: 33%;">Customer WorkOrder:</div> <div style="width: 33%;">Materials Discount: 0.000 %</div> <div style="width: 33%;">Sales Tax Code: TX-DALLAS</div> <div style="width: 33%;">8.25 %</div> <div style="width: 33%;">Labor Discount: 0.000 %</div> </div> <div style="margin-top: 10px;"> <div style="display: flex;"> <div style="flex: 1;"> <div style="margin-bottom: 5px;">Service / Maintenance Agreement</div> <div style="display: flex;"> <div style="flex: 1;"> Contract #: 0  Start Date:  Ending Date:  Total Amount: 0 </div> <div style="flex: 2;"> </div> </div> <div style="margin-top: 5px;"> Signature Date: 03/15/2010... </div> </div> <div style="margin-top: 5px; text-align: right;"> <div style="border: 1px solid gray; padding: 2px 10px;">Capture Customer Signature</div> </div> </div> </div>								

## Line Items tab

Appointment		Parameters		Line Items	Totals	Work Instructions	Time Tracking	Equipment Covered	Imaging	P.O.	
D. Line	Item	Description	Quantity	Retail Price	Discount Price	Extended Price	Tax?				
▶ 1	100-W10144	COPPER COUPLING 1/2	1.000	0.84	0.84	0.84	Y				
2	TWE031E130	VARIABLE SPEED CONV.A/H	1.000	1312.00	1312.00	1312.00	Y				
3	LABOR	TECH LABOR JOURNEYMAN	2.000	75.00	75.00	150.00	Y				
6	T0102	INSTALL 2 TON 10 SEER CONDE	1.000	0.00	0.00	0.00					
7	LABOR	TECH LABOR JOURNEYMAN	3.000	75.00	75.00	225.00	Y				
8	ATR024C	2 TON CONDENSOR 10 SEER	1.000	10010.00	10010.00	10010.00	Y				
9	3030	30X30X3 SLAB	1.000	392.70	392.70	392.70	Y				
10	100-W10143	COPPER COUPLING 3/8	2.000	6.93	6.93	13.86	Y				
11	100-W10157	COPPER COUPLING 3/4	2.000	21.23	21.23	42.46	Y				

## Totals tab

Appointment		Parameters		Line Items	Totals	Work Instructions	Time Tracking	Equipment Covered	Imaging	P.O.																								
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><b>Invoice Billing Totals</b></p> <table style="width: 100%;"> <tr> <td>Subtotal</td> <td>13037.97</td> <td>Taxable</td> <td>13037.97</td> </tr> <tr> <td>8.25 % Sales Tax</td> <td>1075.63</td> <td>Exempt</td> <td>0.00</td> </tr> <tr> <td>Freight</td> <td>0.00</td> <td>Calculated Tax</td> <td>1075.63</td> </tr> <tr> <td>Billing Total</td> <td>14113.60</td> <td></td> <td></td> </tr> </table> </div> <div style="width: 45%;"> <p><b>Remote Checkout</b></p> <p>First Pulled 03/16/2010 1:32:06 PM</p> <p>Last Updated</p> <p>Time Completed</p> </div> </div>											Subtotal	13037.97	Taxable	13037.97	8.25 % Sales Tax	1075.63	Exempt	0.00	Freight	0.00	Calculated Tax	1075.63	Billing Total	14113.60										
Subtotal	13037.97	Taxable	13037.97																															
8.25 % Sales Tax	1075.63	Exempt	0.00																															
Freight	0.00	Calculated Tax	1075.63																															
Billing Total	14113.60																																	
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><b>Invoice Cash Receipts</b></p> <table style="width: 100%;"> <tr> <td>Cash</td> <td>0.00</td> <td></td> <td></td> </tr> <tr> <td>Check</td> <td>0.00</td> <td></td> <td>...</td> </tr> <tr> <td>Credit Card</td> <td>0.00</td> <td></td> <td></td> </tr> <tr> <td>Total Received</td> <td>0.00</td> <td></td> <td></td> </tr> <tr> <td>Deposit Reference</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Deposit Date</td> <td></td> <td></td> <td>...</td> </tr> </table> </div> <div style="width: 45%;"> <p style="text-align: right; font-weight: bold;">Balance Due 14113.60</p> </div> </div>											Cash	0.00			Check	0.00		...	Credit Card	0.00			Total Received	0.00			Deposit Reference				Deposit Date			...
Cash	0.00																																	
Check	0.00		...																															
Credit Card	0.00																																	
Total Received	0.00																																	
Deposit Reference																																		
Deposit Date			...																															

## Work Instructions tab

Appointment	Parameters	Line Items	Totals	Work Instructions	Time Tracking	Equipment Covered	Imaging	P.O.
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Estimate - Customer Work Instructions

Estimate - Technician Work Instructions

## Time Tracking tab

Appointment	Parameters	Line Items	Totals	Work Instructions	Time Tracking	Equipment Covered	Imaging	P.O.
-------------	------------	------------	--------	-------------------	---------------	-------------------	---------	------

	Tech	Tech Name	In Date	In Time	Out Time	Hours	Minutes
▶	JW	John Wayne	05/02/2009	10:45 am	11:25 am	0	40
	JB	Jerry Bower	05/03/2009	10:45 am	11:25 am	0	40
	JB	Jerry Bower	05/03/2009	10:45 am	11:25 am	0	40

New Time

Edit Time

Delete Time

## Equipment Covered tab

Appointment   Parameters   Line Items   Totals   Work Instructions   Time Tracking   <b>Equipment Covered</b>   Imaging   P.O.							
Work On	Location Id	Unit Id	Unit Description	Unit Serial Number	Contract Number	Unit Make	
▶							

## Imaging tab

Appointment   Parameters   Line Items   Totals   Work Instructions   Time Tracking   Equipment Covered   <b>Imaging</b>   P.O.					
Program Area	Document Id	Document Date	Document Description	Document Image Id	
▶					

## P.O ( Purchase Orders ) tab

Appointment   Parameters   Line Items   Totals   Work Instructions   Time Tracking   Equipment Covered   Imaging   <b>P.O.</b>									
	P.O. Number	P.O. Date	Vendor Id.	Vendor Name	P.O. Total	P.O. Complete	Order Number		
▶									

◀
◁
▷
▶
Create Line Items from P.O.
Auto-Create P.O.
New
Edit
Delete

## Entering Work Order Line Items

When on the Line Items tab, you may enter new invoice line items, edit existing line items, or delete line items.

Appointment   Parameters   <b>Line Items</b>   Totals   Work Instructions   Time Tracking   Equipment Covered   Imaging   P.O.							
D. Line	Item	Description	Quantity	Retail Price	Discount Price	Extended Price	Tax?
1	100-W10144	COPPER COUPLING 1/2	1.000	0.84	0.84	0.84	Y
2	TWE031E130	VARIABLE SPEED CONV.A/H	1.000	1312.00	1312.00	1312.00	Y
3	LABOR	TECH LABOR JOURNEYMAN	2.000	75.00	75.00	150.00	Y
6	T0102	INSTALL 2 TON 10 SEER CONDE	1.000	0.00	0.00	0.00	
7	LABOR	TECH LABOR JOURNEYMAN	3.000	75.00	75.00	225.00	Y
8	ATR024C	2 TON CONDENSOR 10 SEER	1.000	10010.00	10010.00	10010.00	Y
9	3030	30X30X3 SLAB	1.000	392.70	392.70	392.70	Y
10	100-W10143	COPPER COUPLING 3/8	2.000	6.93	6.93	13.86	Y
11	100-W10157	COPPER COUPLING 3/4	2.000	21.23	21.23	42.46	Y

Use the New Item, Edit Item, and Delete Item buttons to enter, edit, and delete line items. You may also double-click on an existing line item to edit the selected line.

Entry of the line items occurs from the Line Item Entry screen.

**Invoice Line Item Entry**

Order Number: 376 Line: 2 Invoice Number: 4002  
 Order Date: 02/12/2009 Invoice Date: 03/15/2010  
 Bill To: WILBUR JOHNSTON

**Item Pricing** | Tech Commission

**Item Information**  
 Item Source: Inventory Vendor Number: ACES  
 Flat Rate Method: Flat Rate Task Number:  
 Item: TWE031E130 VARIABLE SPEED CONV A/H  
 Taxable? Yes Add-On? No Display Line: 2  
 Stocked? Yes SubType: Parts Inventory Account: 1300  
 Item Unit: Ea. Sales Account: 4010  
 Item Type: Material Cost Of Goods Account: 5010

Quantity	Regular Price	Discount	Discounted Price	Extended Price
1.000	1312.00	0.000 %	1312.00	1312.00
	Cost			Extended Cost
	656.00			656.00

Serial # Required: Serial #:   
 On Contract? No Vendor Purchase Order:   
 Truck:   
 Job Cost Code: Print? Yes

Ok Cancel

## Entering a new line item based on Company Inventory Items

This is the default and most common way to select items. In the line item entry screen, your Item Source will be Inventory.

Invoice Line Item Entry

Order Number: 376 Line: 17 Invoice Number: 4002  
 Order Date: 02/12/2009 Invoice Date: 03/15/2010  
 Bill To: WILBUR JOHNSTON

Item Pricing | Tech Commission

Item Information  
 Item Source: Inventory Vendor Number:   
 Flat Rate Method: Inventory Flat Rate Task Number:   
 Item: Flat Rate Catalog  
 Taxable? Yes Add-on? No Display Line: 17  
 Stocked? No SubType: Parts Inventory Account:   
 Item Unit: Ea. Sales Account:   
 Item Type: Material Cost Of Goods Account:

Item Pricing  
 Quantity: 1.000 Regular Price: 0.00 Discount: 0.000 % Discounted Price: 0.00 Extended Price: 0.00  
 Cost: 0.00 Extended Cost: 0.00

Serial # Required: No Serial #:   
 On Contract?: No Vendor Purchase Order:   
 Truck:   
 Job Cost Code:   
 Print?: Yes

Ok Cancel

In the Item field, you may use the Inventory Lookup screen to choose your needed selection.

Inventory Lookup

Lookup Characters:   
 Lookup By: By Item Number   
 Equal (= x)   
 Like ( %x% )   
 Like ( %x )   
 Active Items Only   
 Perform Query

Item Number	Item Description	Make	Model	Price	Cost
ADD060C936	79% HORIZ\DOWN 60K 36 DRIVE	AMERICAN STANDARD	GMPN-080-4	1034.00	
ADD060R936	80% HORIZ\DOWN 2 STAGE			1306.00	
ADD080C945	80% HORIZ\DOWN 80K 48 DRIVE			1108.00	
ADD080R936	80% HORIZ\DOWN 2 STAGE			1346.00	
ADD100C945	80% HORIZ\DOWN 100K 48 DRIVE			1142.00	
ADD100R945	80% HORIZ\DOWN 2 STAGE			1426.00	
ADD120C960	80% HORIZ\DOWN 120K 60 DRIVE			1222.00	
ADD120R960	80% HORIZ\DOWN 2 STAGE			1508.00	
ASYSTAT600	PROG.ELECTRONIC SETBACK			197.75	

Item Count: 67

Count: 67

View Clear Ok Cancel

Find the item you need either by the item number, name, vendor, make, model, or category. Select the item by either double-clicking the selected item or clicking on the Ok button

The item information will be shown in the line item entry screen. You may modify the information to the proper description, pricing, etc that you require.

Click on the Ok button to save the item entry. The item will now show in the listed line items on the work order screen.

D. Line	Item	Description	Quantity	Retail Price	Discount Price	Extended Price	Tax?
8	ATRO24C	2 TON CONDENSOR 10 SEER	1.000	10010.00	10010.00	10010.00	Y
9	3030	30X30X3 SLAB	1.000	392.70	392.70	392.70	Y
10	100-W10143	COPPER COUPLING 3/8	2.000	6.93	6.93	13.86	Y
11	100-W10157	COPPER COUPLING 3/4	2.000	21.23	21.23	42.46	Y
12	110-3/4X3/8	TUBING INSULATION	1.000	77.00	77.00	77.00	Y
13	115-61035	15% SILVER-1LB TUBE	0.020	693.00	693.00	13.86	Y
14	125-0835	LIQUIDLINE DRIER 3/8SWEAT	1.000	288.75	288.75	288.75	Y
15	125-STD13-6SV	SUCTION LINE DRIER 3/4	1.000	511.50	511.50	511.50	Y
▶ 17	ADD060C936	79%HZRZ\DOWN 60K 36 DRIVE	1.000	1034.00	1034.00	1034.00	Y

## Entering line items from the Flat Rate Catalog – Invoice Type – Separate Item

Line items can be added from the Flat Rate Catalog that will be shown either as separate line items with individual prices or as a Flat Rate price with items for inventory usage and costing but no prices.

On the Work Order, select either the Invoice type as **Separate Item** or **Lump Sum**. In this case, choose Separate Item. This will show the Flat Rate inventory items listed with individual prices – using the Flat Rate Catalog as a way to create an assembly of inventory items.

The screenshot shows the 'Invoice Entry' form with the following fields and values:

- Base Sales Tax On: Item Price
- Customer Type: ...
- Customer Tax Exempt Id.: ...
- Customer Purchase Order: ...
- Materials Discount: 0.000 %
- Labor Discount: 0.000 %
- Invoice Type: Separate Item
- Work Type: Separate Item (highlighted in the dropdown)
- Customer Terms: Cash with Order
- Customer WorkOrder: ...
- Sales Tax Code: TX-LEWISVILLE
- Sales Tax Rate: 7.25 %

In the Line Item tab, choose the New button to add a new line item.

The line item entry screen will appear. Choose the Item Source as Flat Rate Catalog.

The screenshot shows the 'Invoice Line Item Entry' dialog box with the following fields and values:

- Order Number: 642
- Line: 23
- Invoice Number: 0
- Order Date: 09/28/2009
- Invoice Date: ...
- Bill To: ARBUCK
- Steve Arbuckle
- Item Pricing: Tech Commission
- Item Information:
  - Item Source: Flat Rate Catalog
  - Vendor Number: ...
  - Flat Rate Method: Flat Rate Catalog
  - Flat Rate Task Number: ...
  - Item: Vendor Catalog
  - User Entry: ...
  - Taxable? Yes
  - Add-On? No
  - Display Line: 23
  - Stocked? No
  - SubType: Parts
  - Inventory Account: ...
  - Item Unit: Ea.
  - Sales Account: ...
  - Item Type: Material
  - Cost Of Goods Account: ...
- Item Pricing:
 

Quantity	Regular Price	Discount	Discounted Price	Extended Price
1.000	0.00	0.000 %	0.00	0.00
	Cost			Extended Cost
	0.00			0.00
- Serial # Required: No
- Serial #: ...
- On Contract? No
- Vendor Purchase Order: ...
- Truck: ...
- Job Cost Code: ...
- Print? Yes
- Buttons: Ok, Cancel

Now from Item Field, use the Lookup button to show the Flat Rate Catalog lookup screen.

**Flat-Rate Catalog Lookup**

Lookup Characters:  Equal ( = x )  
 Lookup By:  Like ( %x% )  
☒ Like ( x% ) ☐ Active Items Only

Task Id.	Description	Category	M Price	R Price	O Price	Book Type
T0100	INSTALL 1 1/2TON 10 SEER CONDE	Air Conditioni	1261.43	1406.82	1575.67	Hvac Residential
T0102	INSTALL 2 TON 10 SEER CONDENSE	Air Conditioni	10266.51	12032.29	12144.89	Hvac Residential
T0104	INSTALL 2 1/2 TON 10 SEER COND	Air Conditioni	10415.34	12206.58	12319.18	Hvac Residential
T0106	INSTALL 3 TON 10 SEER CONDENSER	Air Conditioni	13330.35	15634.93	15747.53	Hvac Residential
T0108	INSTALL 3 1/2 TON 10 SEER CONDENSE	Air Conditioni	14700.38	17245.86	17358.46	Hvac Residential
T0110	INSTALL 4 TON 10 SEER CONDENSER	Air Conditioni	16275.11	19097.79	19210.39	Hvac Residential
T0112	INSTALL 5 TON 10 SEER CONDENSER	Air Conditioni	18602.28	21834.16	21946.76	Hvac Residential
T0114	INSTALL 1 1/2 TON 11 SEER CONDENSE	Air Conditioni	12467.04	14619.82	14732.42	Hvac Residential
T0116	INSTALL 2 TON 11 SEER CONDENSER	Air Conditioni	13686.93	16054.21	16166.81	Hvac Residential
T0118	INSTALL 2 1/2 TON 11 SEER CONDENSE	Air Conditioni	14981.89	17576.87	17689.47	Hvac Residential
T0120	INSTALL 3 TON 11 SEER CONDENSER	Air Conditioni	16483.29	19342.27	19454.87	Hvac Residential

Count: 0

Choose the flat rate item that you need and click on the Ok button to pull the flat rate information and items.

**On the line item entry screen, the items will appear with each item having separate pricing.**

D. Line	Item	Description	Quantity	Retail Price	Discount Price	Extended Price	Tax?
37	T0114	INSTALL 1 1/2 TON 11 SEER CON	1.000	0.00	0.00	0.00	
38	LABOR	TECH LABOR JOURNEYMAN	3.000	75.00	75.00	225.00	Y
39	ATN018C	1 1/2 TON COND. 11 SEER	1.000	12276.00	12276.00	12276.00	Y
40	140-36X36	CONDENSOR PAD 36"X36"X3"	1.000	706.75	706.75	706.75	Y
41	100-W10143	COPPER COUPLING 3/8	2.000	6.93	6.93	13.86	Y
42	100-W10157	COPPER COUPLING 3/4	2.000	21.23	21.23	42.46	Y
43	110-3/4X3/8	TUBING INSULATION	1.000	77.00	77.00	77.00	Y
44	115-61035	15% SILVER-1LB TUBE	0.020	693.00	693.00	13.86	Y
45	125-083S	LIQUIDLINE DRIER 3/8SWEAT	1.000	288.75	288.75	288.75	Y
46	125-SLD13-6SV	SUCTION LINE DRIER 3/4	1.000	511.50	511.50	511.50	Y
47	185-84137	6', 8 WIRE, 3/4 WHIP	1.000	422.18	422.18	422.18	Y

## Entering line items from the Flat Rate Catalog – Invoice Type – Lump Sum

Line items can be added from the Flat Rate Catalog that will be shown either as separate line items with individual prices or as a Flat Rate price with items for inventory usage and costing but no prices.

On the Work Order, select either the Invoice type as **Separate Item** or **Lump Sum**. In this case, we will choose Lump Sum which is a Flat Rate type of pricing.

The screenshot shows the 'Invoice Entry' form. The 'Invoice Type' dropdown is set to 'Lump Sum'. Other visible fields include 'Base Sales Tax On' (Item Price), 'Customer Type' (empty), 'Customer Tax Exempt Id.' (empty), 'Customer Purchase Order' (empty), 'Materials Discount' (0.000 %), 'Labor Discount' (0.000 %), 'Sales Tax Code' (TX-LEWISVILLE), and 'Sales Tax' (7.25 %). The 'Work Type' dropdown is set to 'Separate Item', and the 'Customer Terms' dropdown is set to 'Cash with Order'.

In the Line Item tab, choose the New button to add a new line item.

The line item entry screen will appear. Choose the Item Source as Flat Rate Catalog.

The screenshot shows the 'Invoice Line Item Entry' dialog box. The 'Item Source' dropdown is set to 'Flat Rate Catalog'. Other visible fields include 'Order Number' (642), 'Line' (23), 'Invoice Number' (0), 'Order Date' (09/28/2009), 'Invoice Date' (empty), 'Bill To' (ARBUCK), 'Steve Arbuckle', 'Item Information' (Flat Rate Method: Flat Rate Catalog, Item: Vendor Catalog, User Entry: Yes), 'Taxable?' (Yes), 'Add-On?' (No), 'Display Line' (23), 'Stocked?' (No), 'SubType' (Parts), 'Inventory Account' (empty), 'Item Unit' (Ea.), 'Item Type' (Material), 'Cost Of Goods Account' (empty), 'Item Pricing' (Quantity: 1.000, Regular Price: 0.00, Discount: 0.000 %, Discounted Price: 0.00, Extended Price: 0.00, Cost: 0.00, Extended Cost: 0.00), 'Serial # Required' (No), 'Serial #' (empty), 'On Contract?' (No), 'Vendor Purchase Order' (empty), 'Truck' (empty), 'Job Cost Code' (empty), 'Print?' (Yes), and buttons for 'Ok' and 'Cancel'.

Now from Item Field, use the Lookup button to show the Flat Rate Catalog lookup screen.

**Flat-Rate Catalog Lookup**

Lookup Characters:  ...

Lookup By:  ...

☐ Equal (= x) ...  
☐ Like ( %x% ) ...  
☒ Like ( x% )  
☐ Like ( %x )

☐ Active Items Only

Task Id.	Description	Category	M Price	R Price	O Price	Book Type
T0100	INSTALL 1 1/2TON 10 SEER CONDE	Air Conditioni	1261.43	1406.82	1575.67	Hvac Residential
T0102	INSTALL 2 TON 10 SEER CONDENSE	Air Conditioni	10266.51	12032.29	12144.89	Hvac Residential
T0104	INSTALL 2 1/2 TON 10 SEER COND	Air Conditioni	10415.34	12206.58	12319.18	Hvac Residential
T0106	INSTALL 3 TON 10 SEER CONDENSER	Air Conditioni	13330.35	15634.93	15747.53	Hvac Residential
T0108	INSTALL 3 1/2 TON 10 SEER CONDENSE	Air Conditioni	14700.38	17245.86	17358.46	Hvac Residential
T0110	INSTALL 4 TON 10 SEER CONDENSER	Air Conditioni	16275.11	19097.79	19210.39	Hvac Residential
T0112	INSTALL 5 TON 10 SEER CONDENSER	Air Conditioni	18602.28	21834.16	21946.76	Hvac Residential
T0114	INSTALL 1 1/2 TON 11 SEER CONDENSE	Air Conditioni	12467.04	14619.82	14732.42	Hvac Residential
T0116	INSTALL 2 TON 11 SEER CONDENSER	Air Conditioni	13686.93	16054.21	16166.81	Hvac Residential
T0118	INSTALL 2 1/2 TON 11 SEER CONDENSE	Air Conditioni	14981.89	17576.87	17689.47	Hvac Residential
T0120	INSTALL 3 TON 11 SEER CONDENSER	Air Conditioni	16483.29	19342.27	19454.87	Hvac Residential

Count: 0

Choose the flat rate item that you need and click on the Ok button to pull the flat rate information and items.

On the line item entry screen, the items will appear with the first item being the flat rate description, then the second item being the Materials pricing, the third item being the Labor pricing, and then the remaining items are the items used for inventory usage and costing of the job.

D. Line	Item	Description	Quantity	Retail Price	Discount Price	Extended Price	Tax?
▶ 24	T0114	INSTALL 1 1/2 TON 11 SEER CON	1.000	0.00	0.00	0.00	
25	FRTM	Flat Rate Task Materials	1.000	14352.36	14352.36	14352.36	Y
26	FRTL	Flat Rate Task Labor	1.000	225.00	225.00	225.00	N
27	LABOR	TECH LABOR JOURNEYMAN	3.000	0.00	0.00	0.00	Y
28	ATN018C	1 1/2 TON COND. 11 SEER	1.000	0.00	0.00	0.00	Y
29	140-36X36	CONDENSOR PAD 36"X36"X3"	1.000	0.00	0.00	0.00	Y
30	100-W10143	COPPER COUPLING 3/8	2.000	0.00	0.00	0.00	Y
31	100-W10157	COPPER COUPLING 3/4	2.000	0.00	0.00	0.00	Y
32	110-3/4X3/8	TUBING INSULATION	1.000	0.00	0.00	0.00	Y
33	115-61035	15% SILVER-1LB TUBE	0.020	0.00	0.00	0.00	Y
34	125-083S	LIQUIDLINE DRIER 3/8SWEAT	1.000	0.00	0.00	0.00	Y
35	125-STD13-6SV	SUCTION LINE DRIER 3/4	1.000	0.00	0.00	0.00	Y
36	185-84137	6', 8 WIRE, 3/4 WHIP	1.000	0.00	0.00	0.00	Y

## Entering a new line item based on the Vendor Catalog

In the line item entry screen, your Item Source will be Vendor Catalog.

In the Item field, you may use the Inventory Lookup screen to choose your needed selection.

Description	Stock Number	Manufacturer	Model	Cost	Unit	Category
ELECTRIC MOTOR CLEANER, 16 OZ	21958			3.100	32003	
K/M , PARTS, 1/4 HP MOTOR	C1100075			264.880	57204	
K/M , PARTS, 1/4 HP MOTOR	C3100075			227.510	57204	
K/M , PARTS, 1/4 HP MOTOR	C800075			213.280	57204	
K/M , PARTS, GEAR MOTOR	C3100138			167.670	57204	
K/M , PARTS, MOTOR CABLE	C3100092			4.720	57204	
K/M , PARTS, MOTOR PLATE	C43162			0.700	57204	
K/M , PARTS, MOTOR PULLEY	C1000047			15.180	57204	
K/M , PARTS, MOTOR PULLEY	C800047			6.050	57204	

Choose the vendor you need from the drop down at the top of the screen. Find the item you need either by the item number, name, vendor, make, model, or category. Select the item by either double-clicking the selected item or clicking on the Ok button

The item information will be shown in the line item entry screen. You may modify the information to the proper description, pricing, etc that you require.

Click on the Ok button to save the item entry. The item will now show in the listed line items on the work order screen.

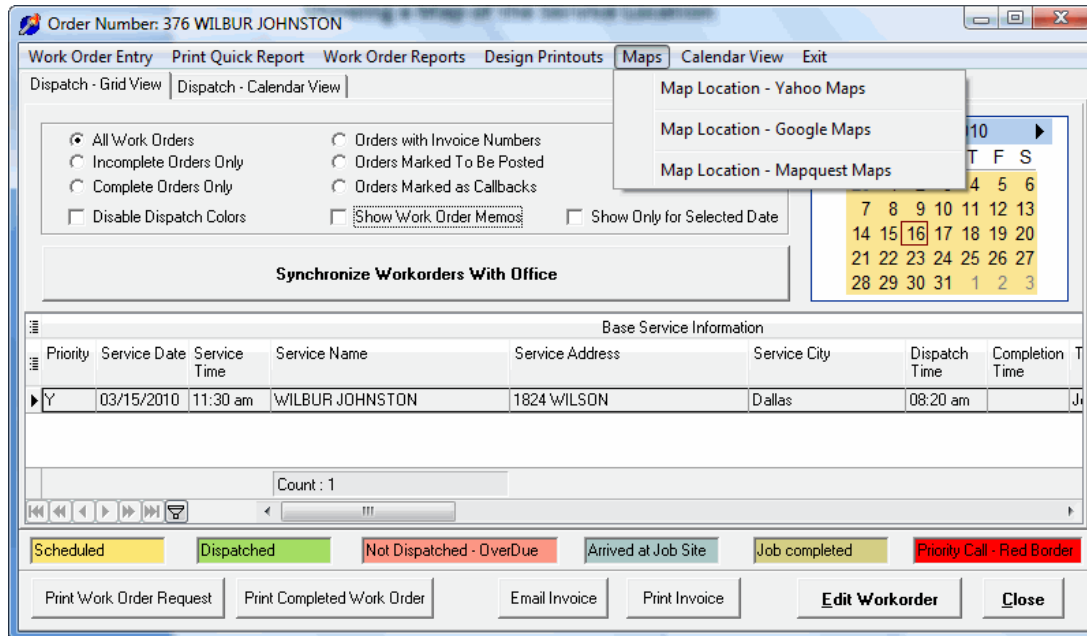
D. Line	Item	Description	Quantity	Retail Price	Discount Price	Extended Price	Tax?
▶ 12	C800075	K/M , PARTS, 1/4 HP MOTOR	1.000	450.00	450.00	450.00	Y



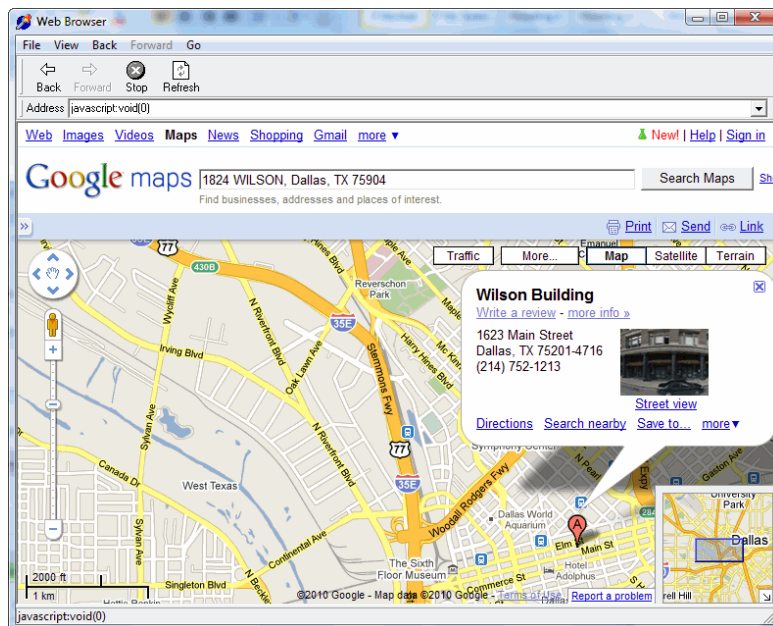
## Showing a Map of the Service Location

A map showing the service location and driving directions for the selected work order can be generated if you have internet access. Maps are generated from the service location using either Google, Yahoo, or MapQuest.

At the top of the Service Dispatch screen is the Maps option. Choose from which map source you would prefer, either Google, Yahoo, or MapQuest.



A browser window will appear showing the map based on the service location entered on the work order.





## Viewing in either the Grid or Calendar View

Work orders entries are viewed either in the grid view or the calendar view.

The work order grid view presents the work order entries in a columnar, table like fashion. The calendar view presents the work orders in a calendar style view, by day, by week, or by month. In the calendar view, the calendar can show work orders grouped by the technician assigned to the work order.

Information shown on the grid are the work order priority, service date, service time, time needed for the call, technician, dispatch time, arrival time, finish time, billing name, billing address, billing city, billing state, billing zip code, service name, service address, service city, service state, service zip code, region of the city, map grid location, service type, work type, department, work order number, date order was input, invoice number, invoice date, contract number.

The screen shows only a portion of these fields upon initialization of this area but the screen can be expanded to show and scroll more fields. Based on the lookup, the fields are arranged in different orders usually with the lookup by field as one of the first fields on the left hand side of the browse screen.

## Work Order in Grid View

Order Number: 376 WILBUR JOHNSTON

Work Order Entry | Print Quick Report | Work Order Reports | Design Printouts | Maps | Calendar View | Exit

Dispatch - Grid View | Dispatch - Calendar View

☒ All Work Orders  
☐ Incomplete Orders Only  
☐ Complete Orders Only  
☐ Disable Dispatch Colors

☐ Orders with Invoice Numbers  
☐ Orders Marked To Be Posted  
☐ Orders Marked as Callbacks  
☒ Show Work Order Memos  
☐ Show Only for Selected Date

Synchronize Workorders With Office

Priority	Service Date	Service Time	Service Name	Service Address	Service City	Dispatch Time	Completion Time
Y	03/15/2010	11:30 am	WILBUR JOHNSTON	1824 WILSON	Dallas	08:20 am	

Count: 1

Date: 03/15/2010 | Time: 11:30 am | Duration: 3.0 Hour | Dispatch: 08:20 am | Arrived: 11:20 am | Finished:

Name: WILBUR JOHNSTON | 1824 WILSON | 214-742-4198 | Tech: John Wayne

Heater out. Kids in house with nanny. Beware of the German Shepard in side yard. Replaced breaker and portion of wiring. Rat had chewed electrical line.

Save

Scheduled | Dispatched | Not Dispatched - OverDue | Arrived at Job Site | Job completed | Priority Call - Red Border

Print Work Order Request | Print Completed Work Order | Email Invoice | Print Invoice | Edit Workorder | Close



## Work Order in Calendar View

The Service Dispatch calendar view presents an alternative Outlook calendar style view of the work orders entered. You may view work orders by day, by week, and by month.

The different views within the calendar are accessed by right-clicking on the calendar and then choosing the view you wish.

Edit the Selected Work Order
Calendar - View - By Day
Calendar - View - By Work Week
Calendar - View - By Week
Calendar - View - By Month
Show Map for Selected Work Order
Print this Work Order
Print this Invoice
Email this Invoice
Print Work Order Quick Report
Print Quick Calendar
Edit the Selected Work Order

### Work Orders - Calendar View - By Day

Order Number: 376 WILBUR JOHNSTON

Work Order Entry | Print Quick Report | Work Order Reports | Design Printouts | Maps | Calendar View | Exit

Dispatch - Grid View | Dispatch - Calendar View

Monday, March 15

Time	7:00	8:00	9:00	10:00	11:00	12:00 pm	1:00	2:00	3:00	4:00	5:00	6:00
						<b>WILBUR JOHNSTON</b> 1824 WILSON, Dallas Appt: 11:30 am Disp: 08:20 am Arr: 11:20 am Fin:						

March, 2010

S	M	T	W	T	F	S
28	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	31	1	2	3
4	5	6	7	8	9	10

Date: 03/15/2010

Time: 11:30 am

Duration: 3.0 Hour

Dispatch: 08:20 am

Arrived: 11:20 am

Finished:

WILBUR JOHNSTON

1824 WILSON

214-742-4198

John Wayne

Heater out. Kids in house with nanny. Beware of the German Shepard in side yard.

Replaced breaker and portion of wiring. Rat had chewed electrical line.

Save Changes

Scheduled | Dispatched | Not Dispatched - OverDue | Arrived at Job Site | Job completed | Priority Call - Red Border

Print Work Order Request | Print Completed Work Order | Email Invoice | Print Invoice | Edit Workorder | Close

**Work Orders - Calendar View - By Week**

Order Number: 376 WILBUR JOHNSTON

Work Order Entry Print Quick Report Work Order Reports Design Printouts Maps Calendar View Exit

Dispatch - Grid View Dispatch - Calendar View

	Sun, Mar 14	Mon, Mar 15	Tue, Mar 16	Wed, Mar 17	Thu, Mar 18	Fri, Mar 19	Sat, Mar 20
7:00							
8:00							
9:00							
10:00							
11:00							
12:00							
1:00							
2:00							
3:00							
4:00							
5:00							
6:00							

March, 2010

S	M	T	W	T	F	S
28	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	31	1	2	3
4	5	6	7	8	9	10

Date: 03/15/2010

Time: 11:30 am

Duration: 3.0 Hour

Dispatch: 08:20 am

Arrived: 11:20 am

Finished:

WILBUR JOHNSTON

1824 WILSON

214-742-4198

John Wayne

Heater out. Kids in house with nanny. Beware of the German Shepard in side yard.

Replaced breaker and portion of wiring. Rat had chewed electrical line.

Save Changes

Scheduled Dispatched Not Dispatched - OverDue Arrived at Job Site Job completed Priority Call - Red Border

Print Work Order Request Print Completed Work Order Email Invoice Print Invoice Edit Workorder Close

## Work Orders - Calendar View - By Month

Order Number: 376 WILBUR JOHNSTON

Work Order Entry Print Quick Report Work Order Reports Design Printouts Maps Calendar View Exit

Dispatch - Grid View Dispatch - Calendar View

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday/Sunday
March, 1	2	3	4	5	6
					7
8	9	10	11	12	13
					14
15	16	17	18	19	20
WILBUR JC					21
22	23	24	25	26	27
					28
29	30	31	April, 1	2	3
					4

March, 2010

S	M	T	W	T	F	S
28	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	31	1	2	3
4	5	6	7	8	9	10

Date: 03/15/2010

Time: 11:30 am

Duration: 3.0 Hour

Dispatch: 08:20 am

Arrived: 11:20 am

Finished:

WILBUR JOHNSTON

1824 WILSON

214-742-4198

John Wayne

Heater out. Kids in house with nanny. Beware of the German Shepard in side yard.

Replaced breaker and portion of wiring. Rat had chewed electrical line.

Save Changes

Scheduled Dispatched Not Dispatched - OverDue Arrived at Job Site Job completed Priority Call - Red Border

Print Work Order Request Print Completed Work Order Email Invoice Print Invoice Edit Workorder Close

## Printing the Tech Forms

Print Work Order Request	Print Completed Work Order	Email Invoice	Print Invoice	Edit Workorder	Close
--------------------------	----------------------------	---------------	---------------	----------------	-------

From the Service Dispatch browse screen, you may print preview on screen, print to the printer, or email a technician field service order and service invoice.

The tech field service order form and the service invoice form show more information than the standard work order print form.

The tech service order form may be modified to fit your companies needs by using the report designer built into the software. Design changes that occur on the Central server side are updated on the tech Remotes when synchronizing.

## Tech Work Order Request

**Print Preview** 54% 1 Close

---

**Industry Specific Hvac Remote**  
 1301 W. Hwy 407 Suite 201-359  
 Lewisville, Texas 75067  
 License # TX987-123456

**Service Order**

Order Number	Service Date	Service Time
376	03/15/10	11:30 am

Invoice 4002

**Bill To: WILBUR**

WILBUR JOHNSTON
1824 WILSON
Dallas TX 75904
214-742-4198

**Location:**

WILBUR JOHNSTON
1824 WILSON
Dallas TX 75904
214-742-4198

---

**Service Instructions**

Priority: Y CSR

Region of City: \_\_\_\_\_

Map Grid: \_\_\_\_\_

Service Requested: Heat / Pump

Problem/Instructions: Heater out. 10ds in house with nanny. Severe of the German Shepherd in side yard.

---

**Dispatch Information**

Technician: JW John Wayne

Dispatch Time: 08:20 am 0820

Time Arrived: 11:20 am 1120

Time Finished: \_\_\_\_\_

Diagnosis / Repair: Replaced breaker and portion of wiring. Ratched checked electrical line.

---

**Equipment On Site**

---

Page 1 of 1

## Tech Field Completed Work Order

**Print Preview**

59% 1 Close

---

**Industry Specific Hvac Remote**  
 1301 W. Hwy 407 Suite 201-359  
 Lewisville, Texas 75067  
 License # TX987-123456

**Work Order 376**  
 Page 1 of 1  
 Service Date 03/15/2010  
 P. O. Number

---

**Bill To:** WILBUR  
 WILBUR JOHNSTON  
 1824 WILSON  
 Dallas, TX 75904

**Location:**  
 WILBUR JOHNSTON  
 1824 WILSON  
 Dallas, TX 75904

Terms: NET DUE UPON RECEIPT

---

**Problem / Instructions:**  
 Heater out. Kids in house with nanny. Owners of the German Shepherd in side yard.

---

**Diagnosis/ Repair:**  
 Replaced breaker and portion of wiring. Rat had chewed electrical line.

---

Item	Description	Serial Number	Quantity	Price	Extended
100-W10144	COPPER COUPLING 1/2		1.00		
TV60316100	VARIABLE SPEED CONV.A/H		1.00		
LABOR	TECH LABOR JOURNEYMAN		2.00		
T0102	INSTALL 2 TON 10 SEER CONDENSE		1.00		
LABOR	TECH LABOR JOURNEYMAN		2.00		
AT8034C	2 TON CONDENSOR 10 SEER		1.00		
3030	30X30X3 SLAB		1.00		
100-W10143	COPPER COUPLING 3/8		2.00		
100-W10157	COPPER COUPLING 3/4		2.00		
110-2140218	TUBING INSULATION		1.00		
115-81035	18# SILVER-TIE TUBE		0.02		
125-0835	LIQUIDINE ORER 2/85WEAT		1.00		
125-SL013-05V	SUCTION LINE ORER 3/4		1.00		

---

**Equipment Worked On:**

**Time Tracking:**

Technician	Date	Time In	Time Out	Hrs	Min
John Wayne	03/02/2009	1045	1125	0	40
Jerry Sover	03/03/2009	1045	1125	0	40
Jerry Sover	03/03/2009	1045	1125	0	40

---

Customer Agreement: I have the authority to enter the work and the place in which has been satisfactorily completed. I agree that after work is done the equipment, materials furnished and that payment is made. If payment is not made as agreed, I agree that I will have the right to enter the property, remove and remove the equipment, materials pursuant to State law. If the invoice is not paid within 30 days of the invoice date, I agree to pay 2% per month on the entire outstanding balance of principal and interest (24% per annum). If this notice is returned to collection, the successful party shall receive all collection fees and all reasonable attorney's fees and costs. Returned checks are subject to a \$35.00 fee.

Warranty: The manufacturer or supplier of the company only warrants all materials, parts and equipment. The labor performed by the state is normal warranty is covered for 90 days or as otherwise indicated in writing. The state is normal warranty means no other warranties, expressed or implied, and its agents or representatives are not authorized to make any such warranties on behalf of state normal warranty.

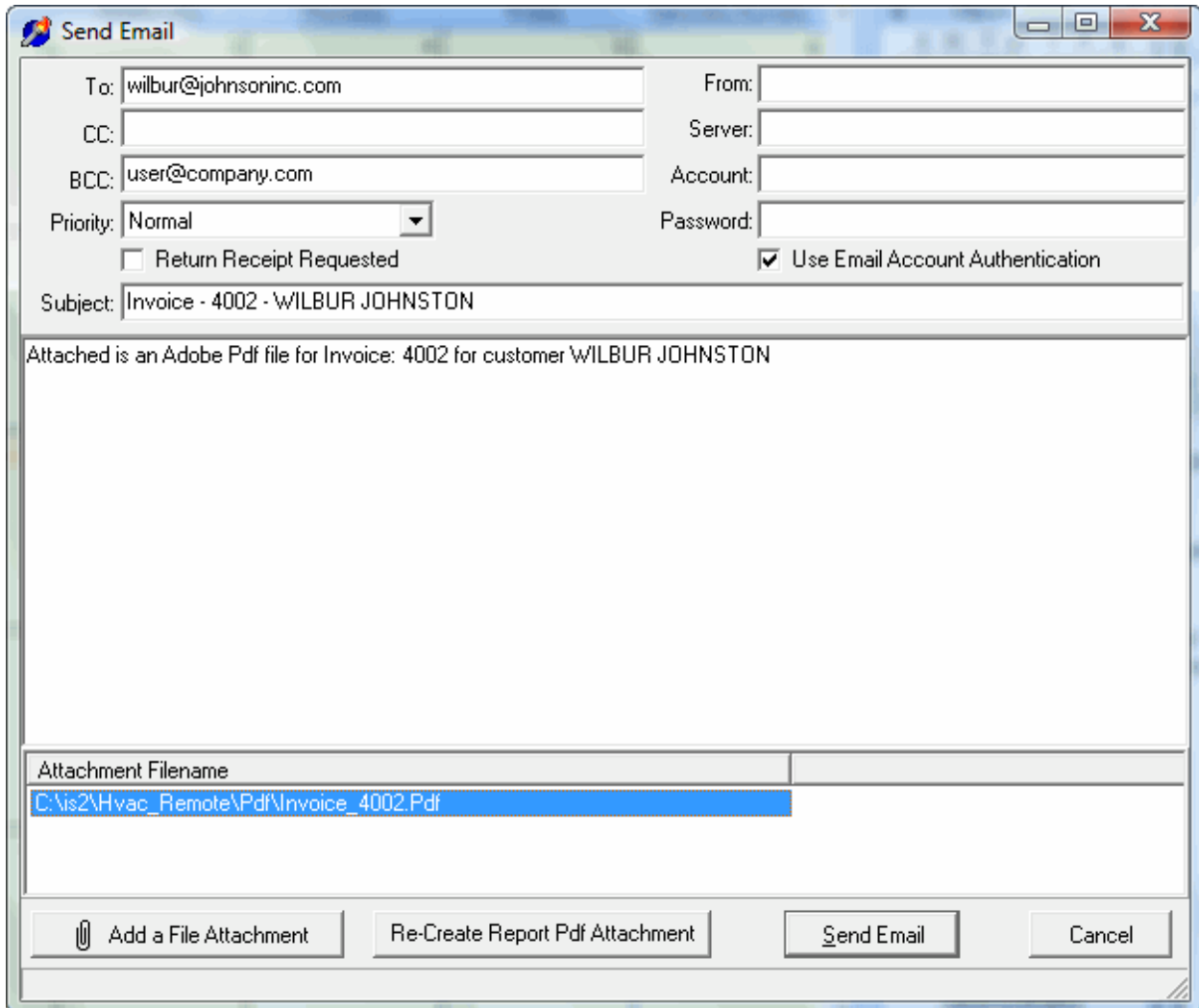
Customer Signature W. Johnston Date 03/15/2010

<b>Subtotal</b>	
<b>Tax</b>	
<b>Freight</b>	
<b>Invoice Total</b>	
<b>Total Paid</b>	
<b>Balance Due</b>	

## Service Dispatch

Page 32

## Email The Tech Field Invoice



The image shows a 'Send Email' dialog box with the following fields and options:

- To:** wilbur@johnsoninc.com
- CC:**
- BCC:** user@company.com
- Priority:** Normal (dropdown menu)
- ☐ Return Receipt Requested
- ☒ Use Email Account Authentication
- From:**
- Server:**
- Account:**
- Password:**
- Subject:** Invoice - 4002 - WILBUR JOHNSTON
- Body:** Attached is an Adobe Pdf file for Invoice: 4002 for customer WILBUR JOHNSTON
- Attachment Filename:** C:\is2\Hvac\_Remote\Pdf\Invoice\_4002.Pdf
- Buttons:** Add a File Attachment, Re-Create Report Pdf Attachment, Send Email, Cancel

## Customer Estimates

The customer estimate area allows you to enter price quotes for your customers. A customer estimate is entered, changed as needed, and then posted when it is accepted. If a customer job number is entered on the estimate, the estimate's item cost and charges will update the job cost screens for that job number. When a customer estimate has been posted, it is available to be pulled into the customer and service invoice areas to allow an invoice to be started from an estimate. Also, an estimate may be created from another estimate ( an estimate in history ). You may change an estimate's customer information if it is derived from another estimate number. Estimate's create no general ledger distribution, but costs of items and general ledger distribution information can be entered to use in the invoicing area.

### Customer Estimate Browse Screen

The screenshot shows the 'Estimates - Browse' window. It has a menu bar with 'Estimate Entry', 'Print Estimate DataGrid', 'Show Maps', 'Print Estimate Form', and 'Exit'. Below the menu bar are search filters: 'Lookup Characters' (text box), 'Lookup By' (dropdown menu set to 'By Estimate Number'), 'Status To Show' (radio buttons for 'Equal ( = x )', 'Like ( %x% )', and 'Like ( x% )', with 'Like ( %x% )' selected), 'Starting Date' (text box), 'Ending Date' (text box), and a 'Perform Query' button. Below the filters is a table with columns: 'Estimate', 'Estimate Date', 'Billing Id.', 'Billing Name', 'Total', 'Expires', 'Accepted', and 'Location Name'. The table contains one row: '75000', '1/2/2010', 'GRAINGEF', 'APRIL GRAINGER', '2325.77', '01/16/2010', and 'APRIL GRAINGER'. Below the table is a scroll bar and a set of navigation buttons: 'Send Estimate to Office', 'Pull Estimate from Office', 'New', 'Edit', 'Delete', and 'Close'.

Estimate	Estimate Date	Billing Id.	Billing Name	Total	Expires	Accepted	Location Name
75000	1/2/2010	GRAINGEF	APRIL GRAINGER	2325.77	01/16/2010		APRIL GRAINGER

### Customer Estimate Entry Screen

**Customer Estimate**

Estimate: 75000  
Estimate Date: 01/02/2010

Bill To: GRAINGER ...  
APRIL GRAINGER  
555 MAIN ST  
BATOW ... FL ... 33830  
863-555-5555

Location: ...  
APRIL GRAINGER  
555 MAIN ST  
BATOW ... FL ... 33830  
863-555-5555

Parameters | Line Item Entry | Profit / Loss | Work To Be Performed | Technician Instructions | Customer Signature

Job Number: ...  
Salesman: ...  
Tax Exempt Id.: ...  
Sales Tax Code: TX-LEWISVILLE ...  
Materials Discount: 0.000 %  
Labor Discount: 0.000 %  
Customer Terms: Due On Receipt ...  
Estimate Memo: ...  
Department: ...

Materials Multiplier: 0.000  
Labor Multiplier: 0.000  
Desired Profit: 0.00 %  
Estimate is Valid Until: 01/16/2010 ...  
Estimate Accepted: ...  
Invoice Type: Separate Item

Create From Prior Estimate | Print Estimate | Ok | Cancel

### Customer Estimate Data

- **Estimate Number:** A unique customer estimate number for each estimate. This number is automatically assigned from the company parameters file. If you want your estimates to start at another number, go to the Company Parameters to change the next available estimate number.
- **Estimate Date:** The customer estimate date.
- **Parameters:**
  - **Customer Billing Information:**
    - Bill To: The customer number from the customer file. A customer number must be entered before line items can be entered.
    - Bill To Name
    - Bill To Address Line 1
    - Bill To Address Line 2
    - Bill To City
    - Bill To State
    - Bill To Zip Code

- Bill To Contact Person
- Bill To Telephone Number
- Bill To E-mail address
- **Customer Service Location:**
  - Location: The service location number from the customer file. A service location number is not required. It is used for customers with multiple service locations. A residential customer with only one location would not need multiple service locations. The service location is not required. Information from the billing information defaults to the service location when the billing number is entered. Service location information can be changed without requiring a service location id.
  - Location Name
  - Location Address Line 1
  - Location Address Line 2
  - Location City
  - Location State
  - Location Zip Code
  - Location Contact Person
  - Location Telephone Number
  - Location E-mail address

## Estimate Parameters

Parameters		Line Item Entry	Profit / Loss	Work To Be Performed	Technician Instructions	Customer Signature
Job Number	<input type="text" value="..."/>				Materials Multiplier	<input type="text" value="0.000"/>
Salesman	<input type="text" value="..."/>				Labor Multiplier	<input type="text" value="0.000"/>
Tax Exempt Id.	<input type="text"/>				Desired Profit	<input type="text" value="0.00 %"/>
Sales Tax Code	<input type="text" value="TX-LEWISVILLE"/>					
Materials Discount	<input type="text" value="0.000 %"/>				Estimate is Vaild Until	<input type="text" value="01/16/2010..."/>
Labor Discount	<input type="text" value="0.000 %"/>				Estimate Accepted	<input type="text" value="..."/>
Customer Terms	<input type="text" value="Due On Reciept"/>					
Estimate Memo	<input type="text"/>					
Department	<input type="text" value="..."/>				Invoice Type	<input type="text" value="Separate Item"/>

- **Job Number:** A job may be assigned to the estimate to start the process of maintaining associated estimated and actual costs based upon a job number. Use job costing only when the job requires more than just one invoice and/or the equipment is not listed on a per invoice basis. Costs are maintained on an invoice to show profitability per invoice. Jobs are set up for work performed over a longer period of time with costs needing to be tracked before the work is completed.
- **Salesman:** The salesman who is preparing this estimate.
- **Customer Tax Exempt Id.:** A tax exempt number from the customer, if the work is tax exempt.
- **Sales Tax Code:** The sales tax code to properly tax the line items. Some companies must use sales tax codes to tax based on the work location. Others use just one sales tax code for all jobs.
- **Customer Discount:** The customer discount allowed on all items. The discount may be

changed at the line item level if not all items are discounted.

- **Customer Terms:** The terms given to this customers. Terms are set up in the terms file.
- **Customer Memo:** A memo that is not printed to keep some notes about this estimate.
- **Estimate Valid Until:** This estimate will be a valid estimate until this date.
- **Estimate Accepted:** This estimate was accepted by the client on this date.
- 

## Customer Estimate Entry Screen - Line Item Entry - Browse

Parameters   Line Item Entry   Profit / Loss   Work To Be Performed   Technician Instructions   Customer Signature							
D. Line	Item Number	Item Description	Tax?	Item Quantity	Discounted Price	Item Unit	Price Extended
▶ 1	T0112	INSTALL 5 TON 10 SEER CONDENSE		1.00	0.00	Ea.	0.00
	2	LABOR	N	3.00	75.00	Ea.	225.00
	3	ATR060C	Y	1.00	1770.00	Ea.	1770.00
	4	140-3648	Y	1.00	64.25	Ea.	64.25

New Line Item

Edit Line Item

Delete Line Item

Sales Tax Rate 7.25

Taxable 1958.76

Exempt 225.00

Subtotal 2183.76

Sales Tax 142.01

Freight 0.00

Estimate Total 2325.77

## Customer Estimate Entry Screen - Line Item Entry - Entry

**Estimate Line Item Entry**

Estimate Number 75000 Line 3 Estimate Date 01/02/2010

Bill To GRAINGER APRIL GRAINGER

Job Number

---

**Item Information**

Item Source User Entry Vendor Number

FlatRate Method  Flat Rate Task Number T0112

Item ATR060C 5 TON CONDENSOR 10 SEER

Taxable Yes Display Line 3

Stocked No Inventory Account ...

Unit Ea. Sales Account ...

Item Type Material Cost Of Goods Account ...

---

**Item Pricing**

Quantity	Regular Price	Discount	Discounted Price	Extended Price
<span style="border: 1px solid black; padding: 2px;">1.00</span>	<span style="border: 1px solid black; padding: 2px;">1770.00</span>	<span style="border: 1px solid black; padding: 2px;">0</span> %	<span style="border: 1px solid black; padding: 2px;">1770.00</span>	<span style="border: 1px solid black; padding: 2px;">1770.00</span>
	Cost			Extended Cost
	<span style="border: 1px solid black; padding: 2px;">885.00</span>			<span style="border: 1px solid black; padding: 2px;">885.00</span>

---

Required No Serial # ...

On Contract?  Vendor Purchase Order ...

Job Cost Code ... ... Print? Yes

Ok
Cancel

- **Line Item Entry:**
  - **Item Number:** The inventory item number from the company inventory file or vendor price list.
  - **Item Description:** The item description as pulled from the inventory file or vendor price list. The description may be changed.
  - **Taxable:** Is this item taxable for sales tax?
  - **Stocked:** Is this item a stocked item or a non-stock item? Non-stock item do not affect the inventory counts when invoiced.
  - **Unit:** The sales unit of this item such as "Ea.", "Ft.", "Box" etc.
  - **Item Type:** Is this item a Materials item or a Labor Item?
  - **Quantity:** The quantity to be sold to your client.
  - **Regular Price:** The regular price before any discounts of this item.
  - **Discount:** The discount percentage for this line item. Originally this is based on the customer discount on the estimate, but it can be changed.
  - **Discounted Price:** The price of the item after any discounts.
  - **Extended Price:** The total price of the sale as calculated ( Quantity times the Discounted Price ).
  - **Profit:** The profit for this item as calculated ( Extended Price minus Extended Cost ).
  - **Cost:** The cost of the item as pulled from the inventory file or as entered if it was picked up. Items that are non-stock items will affect the profit amounts but not the cost of goods sold and inventory reduction totals when invoiced.
  - **Extended Cost:** The extended cost of the item as calculated ( Quantity times the Cost ).
  - **Serial Numbers - Required:** Do serial numbers need to be recorded for this item.
  - **Serial Number:** The serial number of the piece of equipment if required. This serial number is used for serial number tracking.
  - **Job Cost Code:** If a job number was entered on the estimate, a job cost code for this item is required. The job cost code provides for distribution with the job based on the job cost codes.
  - **Inventory Account:** The general ledger account for showing the inventory reduction of this item.
  - **Sales Account:** The general ledger account for showing the sales of this item.
  - **Cost Of Goods Account:** The general ledger account for showing the cost of this item.

## Estimate Profit or Loss

Parameters		Line Item Entry		Profit / Loss		Work To Be Performed		Technician Instructions		Customer Signature	
Item Number	Item Description	Price Extended	Cost Extended	Profit Extended							
▶ T0112	INSTALL 5 TON 10 SEER CONDENSE	0.00	0.00	0.00							
LABOR	TECH LABOR JOURNEYMAN 2	225.00	60.00	165.00							
ATRO60C	5 TON CONDENSOR 10 SEER	1770.00	885.00	885.00							
140-3648	CONDENSOR PAD 36"X48"X3"	64.25	0.00	64.25							
<div style="display: flex; flex-direction: column; gap: 5px;"> <div>New Line Item</div> <div>Edit Line Item</div> <div>Delete Line Item</div> </div>		Total Price		Total Cost		Total Profit					
		2183.76		990.41		1193.35					
				Gross Profit		54.65 %					
				Desired Profit		0.00 %					

## Estimate Work To Be Performed

Enter here a very detailed description of the work that is to be performed for the customer. This area can be printed on the estimate that uses the customer instructions.

Parameters	Line Item Entry	Profit / Loss	Work To Be Performed	Technician Instructions	Customer Signature
<input type="button" value="Add Customer Name"/>			<input type="button" value="Pull from Templates"/>		

- **Work To Be Performed:** Enter here the estimate description as you would present to the client. Anything can be entered here, just as in a word processor.

---

## Estimate Technician Instructions

Enter here the instructions for the technician to perform the work. This is used internally and is not on the customer estimate printout.

Parameters	Line Item Entry	Profit / Loss	Work To Be Performed	Technician Instructions	Customer Signature

- **Technician Instructions:** Enter here the instructions you would give to the technician as to what he should be doing on this job. Detailed instructions can be placed. A separate sheet is printed for the technician. The customer does not have to see these instructions. There is also a listing of equipment printout that is very useful for pulling the necessary equipment for the job.

## Estimate Signatures

If using a laptop or tablet pc, the customer and your representative can sign the estimate digitally. The signatures can be printed on the printed estimate.

Estimate Document Imaging ( being added to Remote – to be same as Central – in 2010 )

Documents related to the estimate can be scanned in and stored with the estimate.

### To enter a new Customer Estimate:

1. From the main menu, choose Customer Estimates.
2. In the Customer Estimate Browse window, choose the New button at the bottom right.
3. You do not eEnter a unique Customer Estimate number for a new Customer Estimate. It is automatically assigned to the next estimate number from the company system file. If the Customer Estimate number has been already used by the system, a caution window will appear.
4. Fill in the remainder of the Customer Estimate screen with the Customer Estimate information appropriate for this Customer Estimate.
5. When you have completed your entries, choose the Ok button to save the information.

6. Choose the Cancel button if you wish to cancel the Customer Estimate entry.

---

## To edit a Customer Estimate:

1. From the main menu, choose Customer Estimates.
2. In the Customer Estimate Browse window, choose the Edit button at the bottom right.
3. Edit the Customer Estimate information as needed
4. When you have completed your entries, choose the Ok button to save the information.
5. Choose the Cancel button if you wish to cancel any changes to the Customer Estimate record.

---

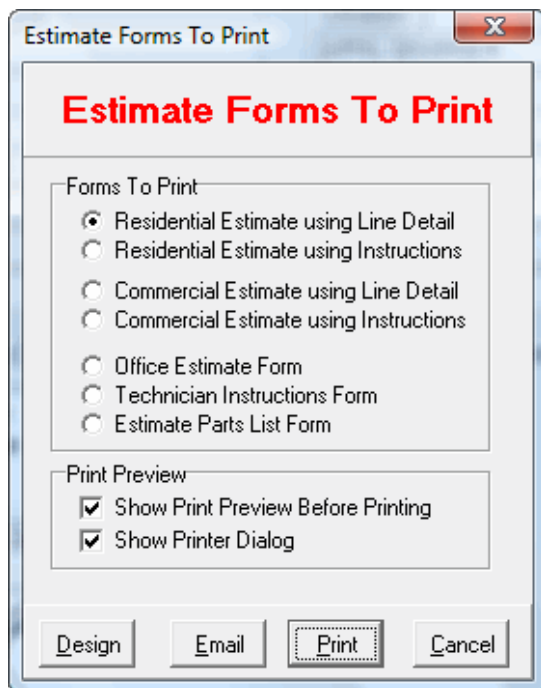
## To delete a Customer Estimate:

1. From the main menu, choose Customer Estimates.
2. In the Customer Estimate Browse window, choose the Delete button at the bottom right.
3. Choose the Yes button to delete the Customer Estimate record.
4. Choose the No button if you do not wish to delete the Customer Estimate record.

---

## To preview / print a Customer Estimate:

After entering or editing a customer estimate, you can print the customer estimate form and its associated other forms.



1. From within the customer estimate entry area, choose the Print Estimate button.
2. Choose which forms to print. The estimate forms to print are:

- Residential Estimate using Line Detail form
  - Residential Estimate using Instructions Estimate form
  - Commercial Estimate using Line Detail form
  - Commercial Estimate using Instructions Estimate form
  - Office Estimate Form
  - Technician Instructions form
  - Estimate Parts List form
3. You may also choose to send the estimate forms directly to a printer without previewing the estimate first by checking/unchecking the Show Print Preview Before Printing.
  4. Click on the Ok button to start the previewing / printing of the customer estimate.

59%

1

Close

**Industry Specific Hvac Remote**  
**1301 W. Hwy 407 Suite 201-359**  
**Lewisville, Texas 75067**  
**License # TX987-123456**

## Estimate

Estimate Date	Estimate Number
01/02/2010	75000

Page 1 of 1

Estimate for: GRAINGER

Location:

APRIL GRAINGER  
555 MAIN ST  
BATOW, FL 33830

APRIL GRAINGER  
555 MAIN ST  
BATOW, FL 33830

Work To Be Performed Description

Item	Description	Quantity	Price	Discou	Discount Price	Extended Price
T0112	INSTALL 5 TON 10 SEER CONDENSE	1.00				
LABOR	TECH LABOR JOURNEYMAN 2	2.00	\$75.00		\$150.00	\$300.00
AT0800C	5 TON CONDENSOR 10 SEER	1.00	\$1,170.00		\$1,170.00	\$1,170.00
140-3845	CONDENSOR PAD 36"X48"X2"	1.00	\$64.25		\$64.25	\$64.25
100-W10142	COPPER COUPLING 3/8	2.00	\$0.63		\$1.26	\$1.26
100-W10157	COPPER COUPLING 3/4	2.00	\$1.63		\$3.26	\$3.26
110-2140215	TUBING INSULATION	1.00	\$7.00		\$7.00	\$7.00
115-61035	15% SILVER-FLK TUBE	0.02	\$63.00		\$1.26	\$1.26
125-0035	LIQUIDLINE ORER 3/8SWEAT	1.00	\$36.25		\$36.25	\$36.25
125-SLD10-85V	SUCTION LINE ORER 3/4	1.00	\$46.50		\$46.50	\$46.50
155-54127	6", 5 WIRE, 214 WHIP	1.00	\$35.25		\$35.25	\$35.25

\* Note: System contamination is always a possibility; should any/all system contamination result of said compressor failure or proper operation; and thereby render operation of this system in or satisfactory; any/all further repairs will be at an additional cost; to be specific all equipment and labor costs. All labor repairs are as is said equal; and have no warranty. All said items not repaired will void warranty. All costs are nonnegotiable and are firm prices.

All materials are guaranteed to be as specified. All work to be completed in a workmanlike manner according to standard practices. Any alteration or deviation from the above specifications involving extra costs will be assessed only upon written order, and will become an extra charge over and above the estimate. All agreements contingent upon arrival, access or delay, beyond our control. Owners carry fire, tornado, and other necessary insurance. Our workers are fully covered by Workmen's Compensation Insurance.

Valid Until: 01/10/2010

Terms: Due On Receipt

Investment **\$2,325.77**  
(Includes parts, labor and tax.)

Customer Signature:

Date: 02/01/2006

Representative Signature:

Date: 02/01/2006

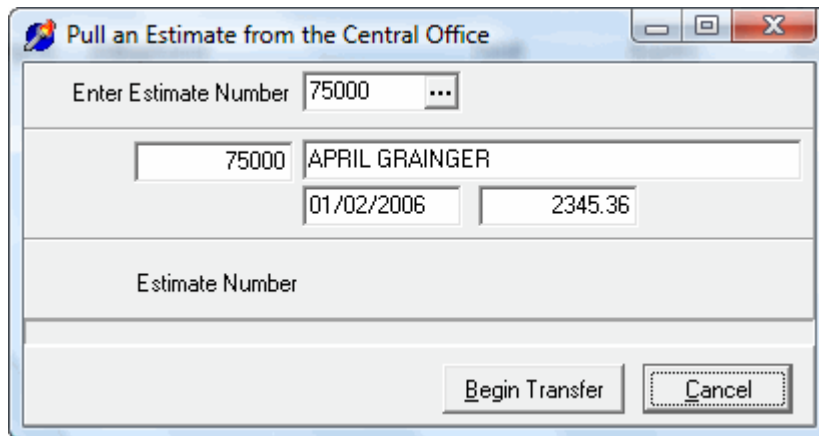
Page 1 of 1

## Estimates - How To Pull From the Central To Remote Technician Program

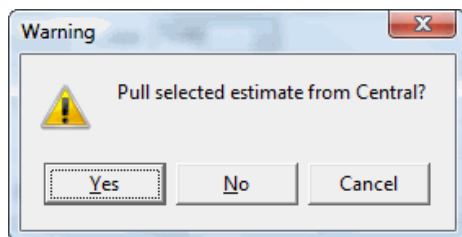
1. From the Main Menu, Choose Customer Estimates.

2. At the bottom of the Customer Estimates browse screen, choose the Pull Estimates From Office button.

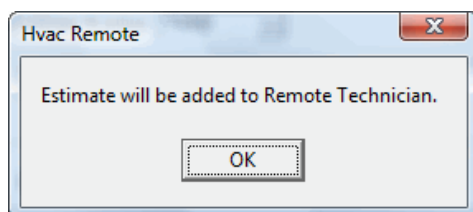
3. The Central Office communications login screen will appear if you are not already connected with the Central office. Click on the Ok button to connect.
4. Enter the estimate number that you wish to pull and click on the estimate lookup button to check to see if the estimate number exists. Click on the Transfer Estimate button at the bottom right to start the transfer.



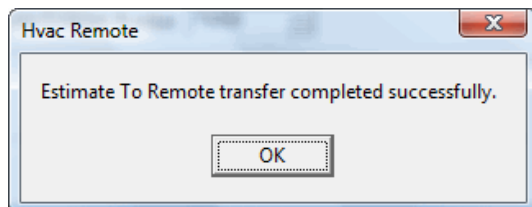
3. Answer Yes, that you want to pull an estimate from the Central server.



6. If the estimate is not found already on the Remote side, a message will appear telling you that the estimate will be added.



4. When completed, a completion message will appear.



5. The estimate should now appear in the Customer Estimates browse screen. If the estimate had already existed on the Remote side prior to the transfer, any changes made on the Central side will overwrite the Remote entries.

Estimates - Browse

Estimate Entry   Print Estimate DataGrid   Show Maps   Print Estimate Form   Exit

Lookup Characters:  ...   Equal ( = x )   Status To Show:  ...   Starting Date:  ...  
 Lookup By: By Estimate Number   Like ( %x% )   Incomplete Only   Ending Date:  ...   Perform Query

Lookup By: Basic Estimate Information

Estimate	Estimate Date	Billing Id.	Billing Name	Total	Expires	Accepted	Location Name
75000	1/2/2006	GRAINGEF	APRIL GRAINGER	2345.36	01/16/2006		APRIL GRAINGER

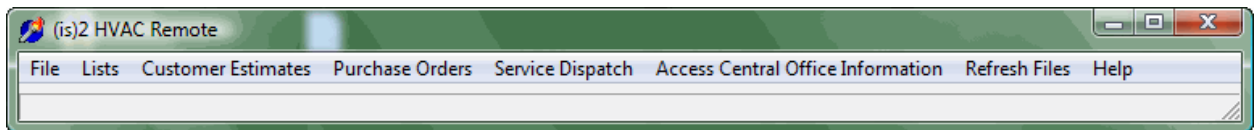
Send Estimate to Office   Pull Estimate from Office   New   Edit   Delete   Close

## Vendor Purchase Orders

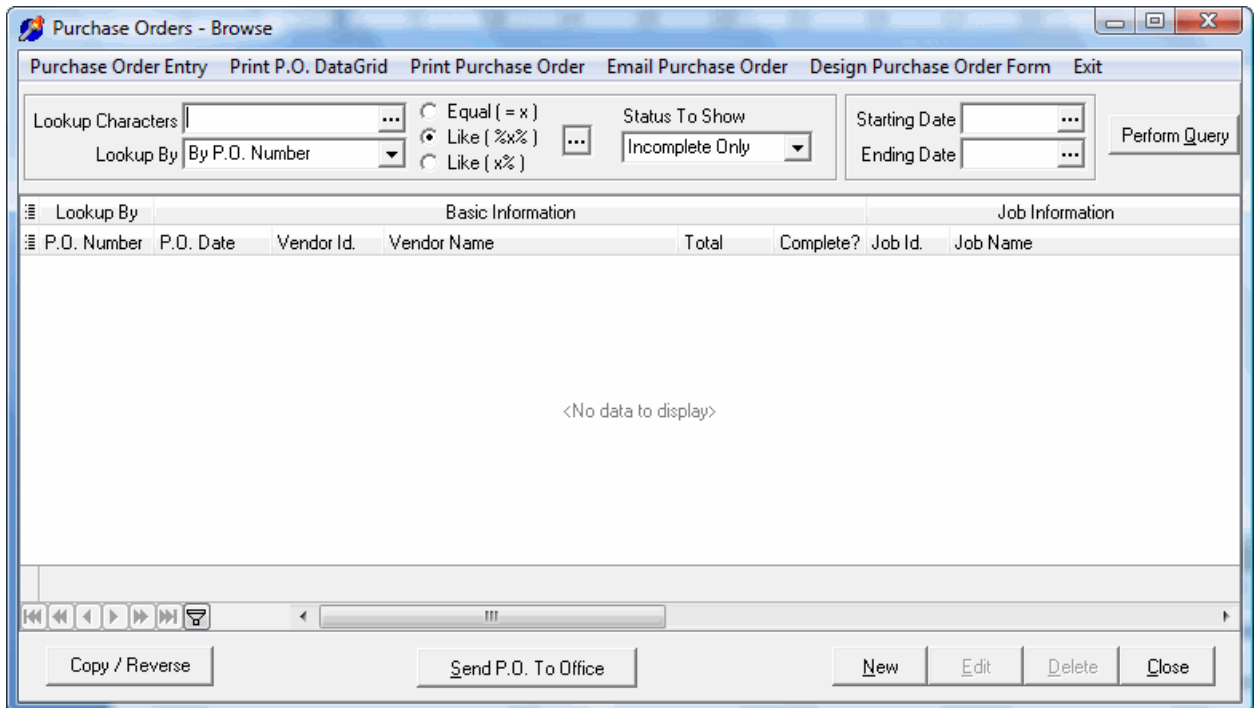
The Vendor Purchase Order area allows you to enter purchase orders for your vendors. A Vendor Purchase Order is entered, changed as needed, and printed or emailed to the vendor.

### To enter or edit a Vendor Purchase Order:

1. From the Document Entry menu, choose Vendor Purchase Orders.



2. In the Vendor Purchase Order Browse window, choose the New or Edit button at the bottom right.



3. You do not enter a unique number for a new Vendor Purchase Order. It is automatically assigned from the company parameters file. If the Vendor Purchase Order number has been already used by the system, a caution window will appear.

**Purchase Order Entry**

## Purchase Order

P.O. Number: 20090015  
P.O. Date: 03/15/2010...

Purchase From:  
Vendor Id: ...

Ship To:  
Company Location:  
Industry Specific Hvac Remote  
1301 W. Hwy 407 Suite 201-359  
Lewisville Tx 75077  
Bill Britain  
214-513-8889  
support2@is2software.com

Terms: ... Ship Via: ... Ship Date: ... Department: ... Approved by: ...

Item	Description	Qty Ordered	Item Cost	Cost Extended	Qty Received

Technician: J/W ...  
Job: ...  
Work Order: 0 ...  
Memo:  
Truck: ...

Subtotal: 0.00  
Tax: 0.00  
Freight: 0.00  
Total: 0.00

P.O. Complete? ☐

New Edit Delete Receive All Email Print Ok Cancel

- Fill in the remainder of the Vendor Purchase Order screen with the information appropriate for this Vendor Purchase Order.
- Use the New, Edit, and Delete buttons at the bottom left to add new, edit, and delete line items for this purchase order.

### To Lookup By Inventory Item:

**Inventory Lookup**

Lookup Characters: A  
Lookup By: By Vendor Item Number

Equal (= x) ...  
Like ( %x% ) ...  
Like ( x% ) ...  
Like ( %x ) ...  
☐ Active Items Only

Perform Query

Basic Item Information				
Vendor Item Number	Vendor Id	Item Number	Item Description	Make
ADD060C936	ACES	ADD060C936	79% HORIZ\DOWN 60K 36 DRIVE	AMERICAN STANDARD
ADD060R936	ACES	ADD060R936	80% HORIZ\DOWN 2 STAGE	
ADD080C945	ACES	ADD080C945	80% HORIZ\DOWN 80K 48 DRIVE	
ADD080R936	ACES	ADD080R936	80% HORIZ\DOWN 2 STAGE	
ADD100C945	ACES	ADD100C945	80% HORIZ\DOWN 100K 48 DRIVE	
ADD100R945	ACES	ADD100R945	80% HORIZ\DOWN 2 STAGE	
ADD120C960	ACES	ADD120C960	80% HORIZ\DOWN 120K 60 DRIVE	
ADD120R960	ACES	ADD120R960	80% HORIZ\DOWN 2 STAGE	
ASYSTAT600	ACES	ASYSTAT600	PROG.ELECTRONIC SETBACK	

Item Count: 66

Count: 66

View Clear Ok Cancel

**Purchase Order Detail Entry**

**P.O. Number** 20090015 **Line Number** 1

**Vendor**

**Item Source** Inventory

**Vendor Item Id.** ADD060C936 ... 79%**HORZ\DOWN 60K 36 DRIVE**

**Manufacturer** AMERICAN STANDARDS ...

**Model** GMPN-080-4 ...

**Serial Number**

**Quantity** 1.00

**Cost** 517.00

**Unit** Ea.

**Extended Cost** 517.00

**Quantity Received** 0.00

**Inventory Account** 1300 ...

**Sales Account** 4010 ...

**Cost Of Goods Account** 5010 ...

**Ok** **Cancel**

6. When you have completed your entries, choose the Ok button to save the information.
7. Choose the Cancel button if you wish to cancel the Vendor Purchase Order entry.
8. Use the Print button to preview and then send the purchase order to a printer.
9. Use the Email button to send the purchase order as an email with the purchase order attached as a pdf form.

## Vendor Purchase Order Entry Screen

**Purchase Order Entry**

**Purchase Order**

P.O. Number: 20090015  
P.O. Date: 03/15/2010...

**Purchase From**  
Vendor Id: ...

**Ship To**  
Company Location:  
Industry Specific Hvac Remote  
1301 W. Hwy 407 Suite 201-359  
Lewisville Tx 75077  
Bill Brittain  
214-513-8889  
support2@is2software.com

Terms: ... Ship Via: ... Ship Date: ... Department: ... Approved by: ...

Item	Description	Qty Ordered	Item Cost	Cost Extended	Qty Received

Technician: JW ...  
Job: ...  
Work Order: 0 ...  
Memo: ...  
Truck: ...

Subtotal: 0.00  
Tax: 0.00  
Freight: 0.00  
Total: 0.00

P.O. Complete? ☐

New Edit Delete Receive All Email Print Ok Cancel

## Vendor Purchase Order Data

- **Purchase Order Number:** A unique Vendor Purchase Order number must be entered for each purchase order. This number is automatically assigned from the company parameters file. If you want your purchase orders to start with another number, go to the Company Parameters to change the next available purchase order number.
- **Purchase Order Date:** The purchase order date.
- 
- **Vendor Information:**

- Vendor: The vendor number from the vendor file. A vendor number must be entered before line items can be entered.
- Vendor Name
- Vendor Address Line 1
- Vendor Address Line 2
- Vendor City
- Vendor State
- Vendor Zip Code
- Vendor Contact Person
- Vendor Telephone Number
- **Company Information:**
  - Company Name
  - Company Address Line 1
  - Company Address Line 2
  - Company City
  - Company State
  - Company Zip Code
  - Company Contact Person
  - Company Telephone Number
  -
- **Terms:** The terms given to you by this vendor.
- **Ship Via:** Which shipper should be used? or Which technician should pick up the equipment.
- **Ship Date:** Have vendor ship by this date.
- **Approved By:** This estimate was approved by who within your company.
- **Technician:** The technician for the work order where this equipment is needed.
- **Job:** The job number this equipment is assigned to.
- **Memo:** A memo area to keep notes about this purchase order request.
- **Truck:** the truck receiving this purchase order list of items.

## Vendor Purchase Order Entry Screen - Item Entry

- **Line Item Entry:**
  - **Item Number:** The inventory item number from the Company Inventory list or Vendor Price lists or as User Entry ( free form entry with no lookups ).
  - **Item Description:** The item description as pulled from the inventory file or vendor price list. The description may be changed.
  - **Unit:** The sales unit of this item such as "Ea.", "Ft.", "Box" etc.
  - **Quantity:** The quantity to be sold to your client.
  - **Cost:** The cost of the item as pulled from the inventory file or as entered if it was picked up. Items that are non-stock items will affect the profit amounts but not the cost of goods sold and inventory reduction totals when invoiced.
  - **Extended Cost:** The extended cost of the item as calculated ( Quantity times the Cost ).
  - **Quantity Received:** How many of this item were currently received.
  - 
  - **Manufacturer:** The manufacturer or make of the item.
  - **Model:** the manufacturer model of this item.
  - **Serial Number:** The serial number of the piece of equipment if required. This serial number is used for serial number tracking.

**To delete a Vendor Purchase Order:**

1. From the Document Entry menu, choose Vendor Purchase Orders.
2. Select the purchase order that you wish to delete.
3. In the Vendor Purchase Order Browse window, choose the Delete button at the bottom right.
4. Choose the Yes button to delete the Vendor Purchase Order record.
5. Choose the No button if you do not wish to delete the Vendor Purchase Order record.

Lookup By		Basic Information			Job Information		
P.O. Number	P.O. Date	Vendor Id.	Vendor Name	Total	Complete?	Job Id.	Job Name
20090015	3/15/2010	BOWMAN	Bowman Tools	517.00 N			

## To preview / print a Vendor Purchase Order:

After entering or editing a Vendor Purchase Order, you can print the Vendor Purchase Order form.

**Industry Specific Hvac Remote**  
1301 W. Hwy 407 Suite 201-359  
Lewisville, Texas 75067  
License # TX987-123456

**Purchase Order**

P.O. Date	P.O. Number
03/15/2010	20090015

Page 1 of 1

**Purchase from:**  
Bowman Tools

**Deliver To:**  
Industry Specific Hvac Remote  
1301 W. Hwy 407 Suite 201-359  
Lewisville, Tx 75077  
Bill Brittain  
214-513-8889

Terms	Ship Via	Ship By This Date	Technician	Work Order	Job Number	Approved By
Net Upon Receipt		03/15/2010	JW	0		

Item	Description	Quantity	Cost Unit	Extended
A000000000	TOWHOREZ DOWN 80K 35 DRIVE Make: AMERICAN STANDARD Model: GMPN-000-4	1.00	\$517.00 Ea.	\$517.00

Memo :

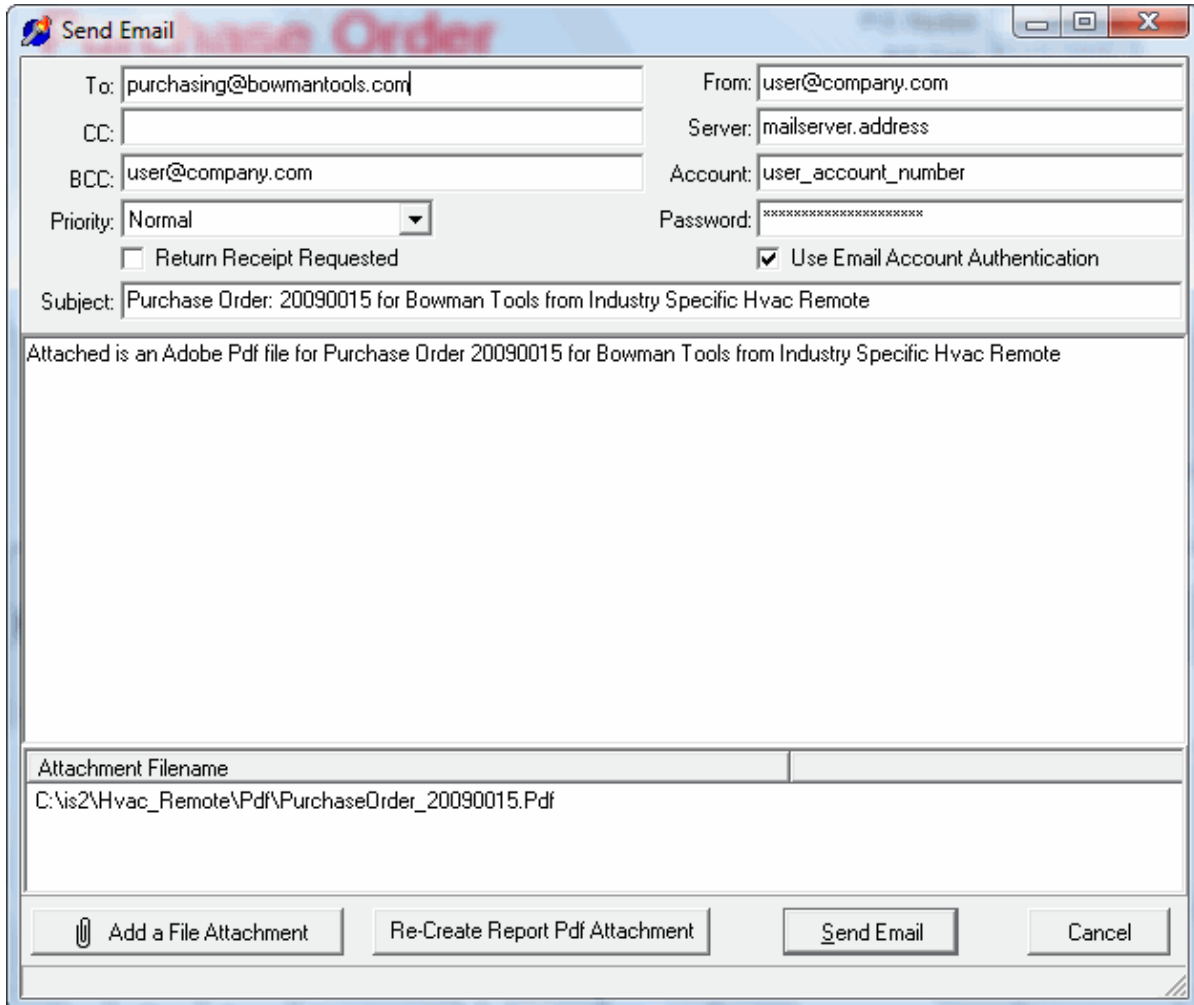
Subtotal	\$517.00
Tax	\$0.00
Freight	\$0.00
<b>Total</b>	<b>\$517.00</b>

Page 1 of 1

1. From within the Vendor Purchase Order entry area, choose the Print button.
2. Choose the Print Report button.
3. The print preview window will appear. Use the page view buttons to size the previewed report, and the page navigator buttons to scroll forward and backward thru the report pages.
4. To send to the printer, click on the Printer Speed Button at the top left of the print preview screen.
5. The printer dialog box will appear. Make any changes necessary. You may change the number of copies, page range, and the designated printer.
6. Choose the Ok button to send the report to the printer.
7. Choose the Close button to end the print preview.

**To email a Vendor Purchase Order:**

After entering or editing a Vendor Purchase Order, you can email the Vendor Purchase Order form.



The image shows a 'Send Email' dialog box with the following fields and options:

- To:** purchasing@bowmantools.com
- From:** user@company.com
- CC:** (empty)
- BCC:** user@company.com
- Server:** mailserver.address
- Account:** user\_account\_number
- Priority:** Normal (dropdown menu)
- Password:** (masked with asterisks)
- ☐ Return Receipt Requested
- ☒ Use Email Account Authentication
- Subject:** Purchase Order: 20090015 for Bowman Tools from Industry Specific Hvac Remote
- Message Body:** Attached is an Adobe Pdf file for Purchase Order 20090015 for Bowman Tools from Industry Specific Hvac Remote
- Attachment Filename:** C:\is2\Hvac\_Remote\Pdf\PurchaseOrder\_20090015.Pdf
- Buttons:** Add a File Attachment, Re-Create Report Pdf Attachment, Send Email, Cancel

8. From within the Vendor Purchase Order entry area, choose the Email button.
9. The email dialog window will appear.
10. Check the email address information and your user account information.

11. You can view the pdf attachment of the purchase order for correctness by double-clicking on the Attachment Filename.

**Industry Specific Hvac Remote**  
 1301 W. Hwy 407 Suite 201-359  
 Lewisville, Texas 75067  
 License # TX987-123456

**Purchase Order**

P.O. Date	P.O. Number
03/15/2010	20090015

Page 1 of 1

**Purchase from:**  
 Bowman Tools

**Deliver To:**  
 Industry Specific Hvac Remote  
 1301 W. Hwy 407 Suite 201-359  
 Lewisville, Tx 75077  
 Bill Brittain  
 214-513-8889

Terms	Ship Via	Ship By This Date	Technician	Work Order	Job Number	Approved By
Net Upon Receipt		03/15/2010	JW	0		

Item	Description	Quantity	Cost	Unit	Extended
AD0050C936	79% HORIZ/DOWN 50K 36 DRIVE Make: AMERICAN STANDARD Model: GMPN-080-4	1.00	\$517.00	Ea.	\$517.00

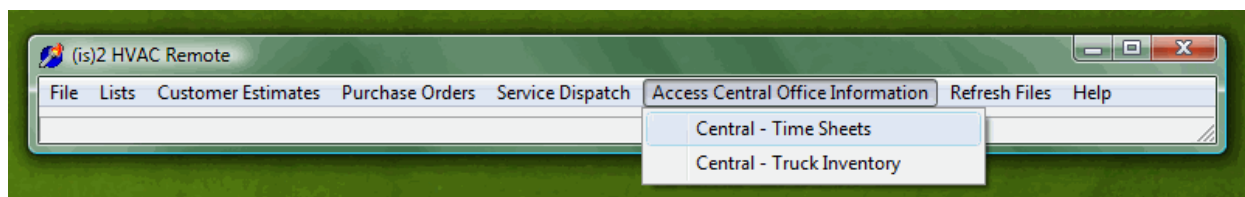
Memo :

Subtotal	\$517.00
Tax	\$0.00
Freight	\$0.00
<b>Total</b>	<b>\$517.00</b>

12. Click on the Send Email button to send the email.

## Access Central Office Information

From the Technician Remote, if you have internet access, you may access data residing directly on the Central server for Time Tracking and Truck Inventory entries.



Data is accessed from the Central side based on the Remote Parameters settings for the Remote Technician Id and the Remote Truck Id.

A screenshot of the 'Company Parameters - HVAC Remote' dialog box. It has four tabs: 'Basic Company Information', 'Email / Login Parameters', 'Purchase Orders', and 'Update Login'. The 'Basic Company Information' tab is active. It contains several input fields: 'Company Name' (Industry Specific Hvac Remote), 'Address Line 1' (1301 W. Hwy 407 Suite 201-359), 'Address Line 2' (Lewisville, Texas 75067), and 'City, State Zip Code' (License # TX987-123456). Below these are 'Document Entry Parameters' with 'Next Estimate Number' (20090008), 'Next Work Order Number' (20090001), 'Calculate Sales Taxes Based On' (Item Price), and 'Default Tax Code' (TX-DALLAS). To the right are 'Remote Technician Id' (JW) and 'Remote Truck Id' (T1). At the bottom are 'Default Printer Selection' for 'Work Orders' and 'Estimates', both set to 'Default'. 'Ok' and 'Cancel' buttons are at the bottom right.

## Access Central Office Time Tracking

Choose Central – Time Sheets from the main menu.

The Remote program will log into the Central server with the parameters specified in the Remote Parameters area and show the Time Sheet entries for the specified Technician Id.

The screenshot shows a software window titled "Time Sheets - Browse". It has a menu bar with "Time Sheet Entry", "Print Timesheet Grid", and "Exit". Below the menu bar, there are search filters: "Lookup Characters" with a text box and a button "...", "Lookup By" with a dropdown menu set to "By Date", and three radio buttons for "Equal ( = x )", "Like ( %x% )" (which is selected), and "Like ( x% )". To the right are "Starting Date" and "Ending Date" text boxes with "..." buttons, and a "Perform Query" button. Below these filters is a table with columns: "Date", "Start Time", "Tech Name", "End Time", "Calcd Hours", "Calcd Minutes", "Order Number", and "Dept". The table contains several rows of data, with the row for "1/17/2004" highlighted in blue. Below the table is a status bar with navigation icons (back, forward, etc.) and a scroll bar. At the bottom right are "Edit" and "Close" buttons.

Date	Start Time	Tech Name	End Time	Calcd Hours	Calcd Minutes	Order Number	Dept
12/28/2000	0730	John Wayne	0815	0	45	192	
8/19/2002	0700	John Wayne	0835	1	35	279	
1/15/2004	1600	John Wayne	1700	1	0	371	
1/17/2004	1220	John Wayne	1340	1	20	372	INSTALL
1/22/2004	1135	John Wayne	1535	4	0	374	INSTALL
1/23/2004	0800	John Wayne	1500	7	0	374	
2/2/2005	0945	John Wayne	1140	1	55	378	
5/2/2009	1045	John Wayne	1125	0	40	376	

Use the Lookup Characters, Lookup By and the starting and ending date to pull the data you need. Click on the Perform Query button to run the query.

When records are shown, select a record and click on the Edit button to look at the record detail.

The screenshot shows a Windows-style dialog box titled "Time Sheet Entry". It contains two main sections: "Time Entry" and "Order Information".

**Time Entry Section:**

- Technician: A dropdown menu showing "JW" and a text field containing "John Wayne".
- Date: A date picker showing "01/17/2004".
- Control Nbr: A text field containing "19".
- Start Time: A time dropdown menu showing "12:20 pm".
- End Time: A time dropdown menu showing "01:40 pm".
- Calculated: Two spinners for "Hr." (set to 1) and "Min." (set to 20).
- Billable: A dropdown menu showing "Yes".
- Department: A dropdown menu showing "INSTALL".
- Time Category: A dropdown menu showing "Actual".

**Order Information Section:**

- Order Number: A text field containing "372".
- Invoice Number: A text field containing "567893".
- Customer: A dropdown menu showing "PALMAIRE" and a text field containing "Tom and Mary Palmer".
- Job Number: A text field containing an empty space.

At the bottom right, there are "Ok" and "Cancel" buttons.

Data can be changed and will immediately update the Central server tables.

## Access Central – Truck Inventory

Choose Central – Truck Inventory from the main menu.

The Remote program will log into the Central server with the parameters specified in the Remote Parameters area and show the Truck Inventory entries for the specified Truck Id.

Truck Inventory Item Listing					
Item Number	Item Description	Bin Location	Stocking Qty	Quantity On Truck	Q
200-1006	CORK TAPE		3	3	
221-170-24X12	RETURN AIR GRILL		1	0	
ADD100R945	80% HORZ\DOWN 2 STAGE			1	
ADD120C960	80%HORZ\DOWN 120K60 DRIVE			1	
AWR018C	1 1/2 TON HEATPUMP 10SEER			1	
T30X24	TRANSITION FOR TXF024	T30	1	2	
TWE040E130	VARIABLE SPEED CONV A\H		2	1	
TWE042C140	HORZ\VERT AIR HANDLER		3	4	

Items cannot be edited from the Remote side but you can print a Truck Inventory Report.

Print Preview

File View Format Go

75%

Margins Left: 0.5 " Top: 0.5 " Right: 0.5 " Bottom: 0.5 " Header: 0.2 " Fo

Lookup By	Truck Inventory Item Listing				Central - For
Item Number	Item Description	Bin Location	Stocking Qty	Quantity On Truck	Qty - Service Orders
200-1006	CORK TAPE		3	3	
221-170-24X12	RETURN AIR GRILL		1	0	
ADD100R945	80% HORZ/DOWN 2 STAGE			1	
ADD120C960	80%HORZ/DOWN 120K60 DRIVE			1	
AWR018C	1 1/2 TON HEATPUMP 10SEER			1	
T30X24	TRANSITION FOR TNF024	T30	1	2	
TWE040E130	VARIABLE SPEED CONV A/H		2	1	
TWE042C140	HORZ/VERT AIR HANDLER		3	4	
Count: 8					

<Filter is Empty>

Page: 1 of 2 Pages Paper Size: 8.5 " x 11 " Status: Ready

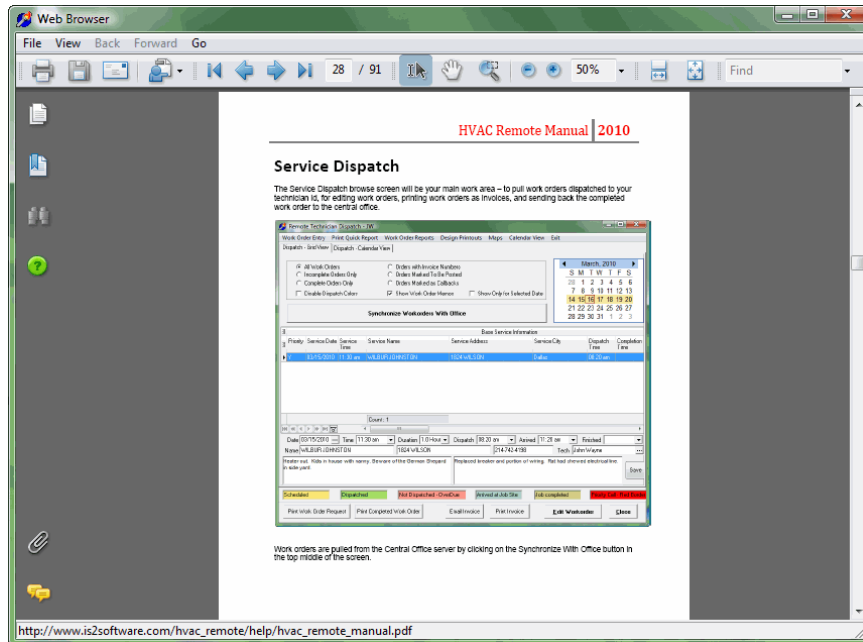
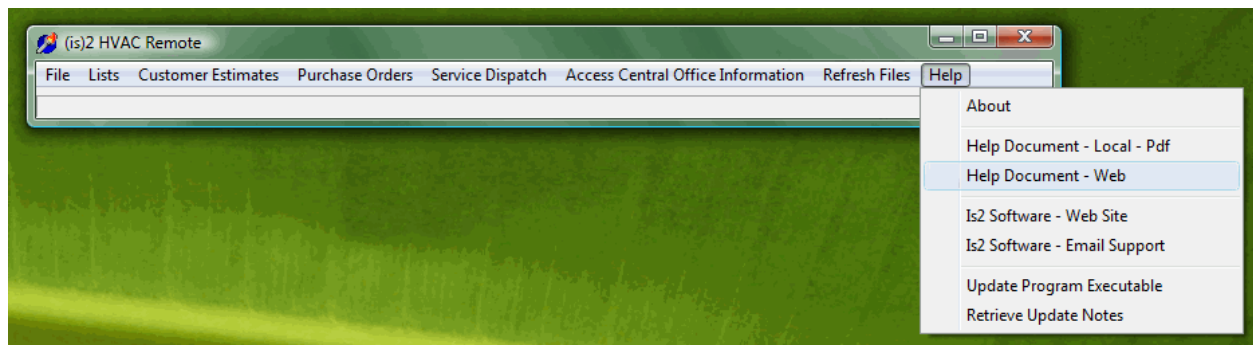
# Saving Help Pdf To A Local File

The latest update to date Help pdf file can be found at:

[http://www.is2software.com/hvac\\_remote/help/hvac\\_remote\\_manual.pdf](http://www.is2software.com/hvac_remote/help/hvac_remote_manual.pdf)

If you would like to have the document available to your HVAC Remote program locally, you can save the file to a folder on your laptop.

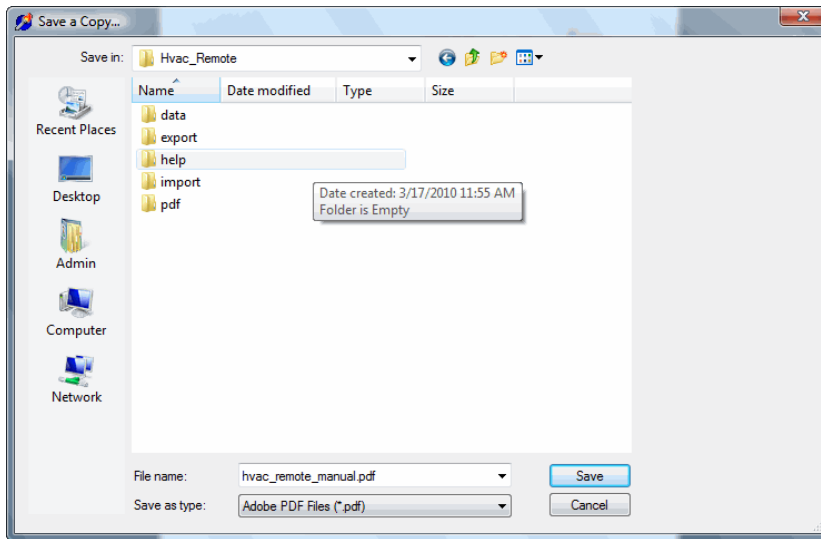
First, go to the link above or access from the HVAC Remote Help menu option – Help Document – Web to bring up the document in your web browser.



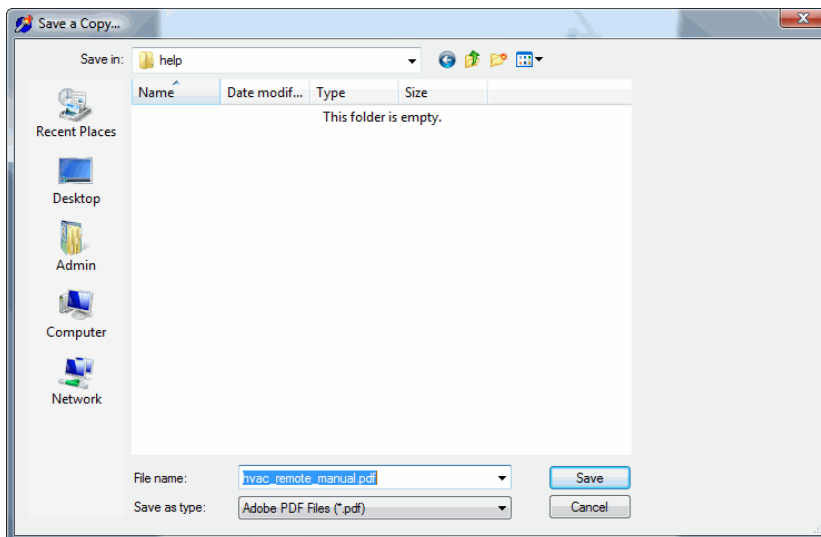
From the web browser pdf screen, click on either the file menu or the Save icon.



A save dialog will appear.

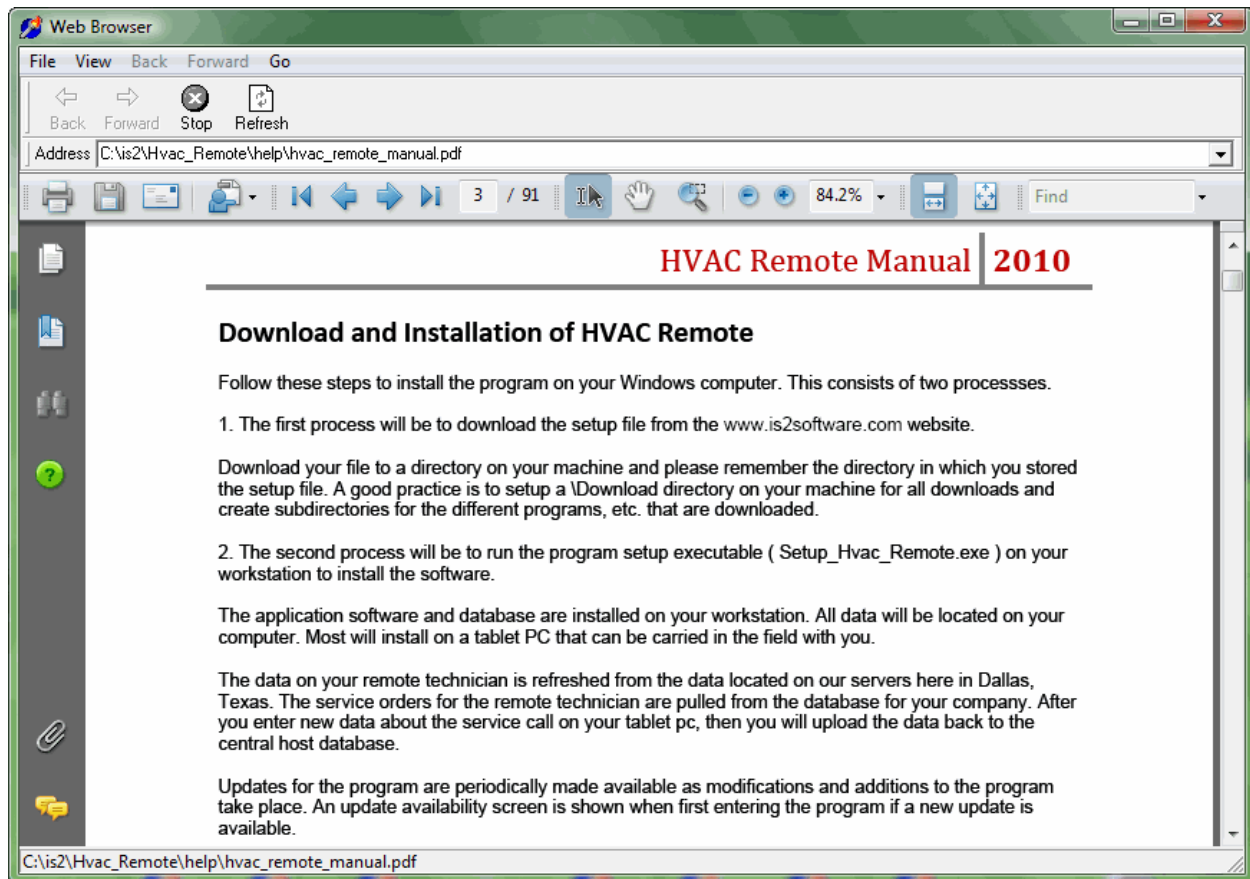
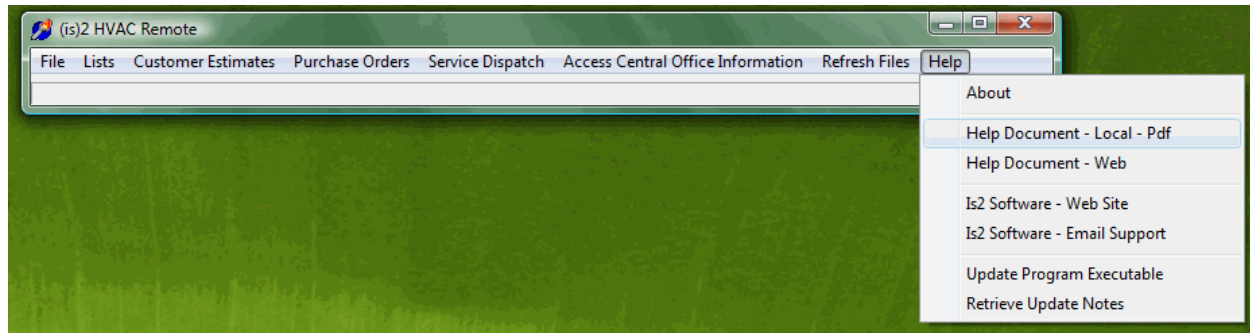


Navigate to the Computer | Is2 | Hvac\_Remote | help folder on your laptop. This is where you should save the file.



Save in the Help folder with the name Hvac\_Remote\_Manual.pdf so that the Remote program can find it easily.

You can now access the help document from the HVAC Remote program locally by using the Help | Help Document – Local – Pdf option.



## Revision to the Tech Field Invoice – the Wal-Mart Invoice requirements

We have added Item subtype field to the inventory table and to the estimate and service order / invoice tables in order to provide the item subtotals needed for your Wal-Mart invoicing.

Existing items and line items were defaulted with the new field definitions to all be Parts. Changes in the inventory will not affect existing line items.

These totals are shown on the invoice Analysis tab.

**Work Order / Invoice Entry**

**Invoice**

Order Number: 345 Invoice Number: 1013  
Order Date: 03/14/2003 Invoice Date: 05/03/2009

Bill To: AUGUSTA REED  
1006 S. 12TH STREET  
Dallas TX 75905  
214-429-6705

Location: AUGUSTA REED  
2129 Bishop Drive  
Flower Mound TX 75028  
214-429-6705

Based On Estimate: 0  
Contract #: 0  
☐ Callback?  
☐ Complete?  
☐ Post Invoice?

Appointment | Parameters | Line Items | Totals | Site | Work Instructions | Time Tracking | Equipment | Imaging | P.O.s | Analysis

Item Sales		Item Costs		Tech Commission	
Sales - Materials	60.00	Cost - Materials	20.00	Commission - Materials	0.00
Sales - Labor	75.00	Cost - Labor	0.00	Commission - Labor	0.00
<b>Total Sales</b>	<b>135.00</b>	<b>Total Costs</b>	<b>20.00</b>	<b>Total Commission</b>	<b>0.00</b>

Item SubType Sales Breakdown		Item SubType Costs Breakdown		Add-On Sales	
Sales - Labor	75.00	Costs - Labor	0.00	Sales - Add-Ons	0.00
Sales - Equipment	0.00	Costs - Equipment	0.00	Costs - Add-Ons	0.00
Sales - Parts	60.00	Costs - Parts	20.00		
Sales - Refrigerant	0.00	Costs - Refrigerant	0.00		
Sales - Freight	0.00	Costs - Freight	0.00		
Sales - Travel	0.00	Costs - Travel	0.00		
Sales - Other	0.00	Costs - Other	0.00		

Gross Profit Margin %: 85.190 Gross Profit Margin: 115.00 GPM minus Commissions:

Page Technician | Print Work Order | Customer Inquiry | Ok | Cancel

These totals are generated based on the item entry for Item Subtype for each invoice line item. On the line item entry, the Item Subtype is located in the middle of the screen.

The subtypes are Labor, Equipment, Parts, Refrigerant, Freight, Travel, and Other.

The Equipment subtype will also help with separating the Equipment materials from the Parts materials for updating the customer equipment lists automatically.

Below showing – Subtype is **Labor**.

The screenshot shows the 'Invoice Line Item Entry' window for Line 2. The 'Item' is 'LABOR' and the 'SubType' is 'Labor'. The 'Item Source' is 'Inventory'. The 'Taxable?' checkbox is checked. The 'Stocked?' checkbox is unchecked. The 'Item Unit' is 'Ea.'. The 'Item Type' is 'Labor'. The 'Quantity' is 1.000. The 'Regular Price' is 75.00. The 'Discount' is 0.000%. The 'Discounted Price' is 75.00. The 'Extended Price' is 75.00. The 'Cost' is 0.00. The 'Extended Cost' is 0.00. The 'Inventory Account' is 1300. The 'Sales Account' is 4020. The 'Cost Of Goods Account' is 5020. The 'Vendor Number' is empty. The 'Vendor Item Number' is empty. The 'Display Line' is 2. The 'Serial # Required' dropdown is set to 'No'. The 'Serial #' field is empty. The 'On Contract?' dropdown is set to 'No'. The 'Vendor Purchase Order' field is empty. The 'Truck' field is empty. The 'Dept' field is empty. The 'Job Cost Code' field is empty. The 'Print?' dropdown is set to 'Yes'. The 'Manufacturer' field is empty. The 'Model' field is empty. The 'Ok' and 'Cancel' buttons are at the bottom.

Below showing for subtype – **Parts**.

The screenshot shows the 'Invoice Line Item Entry' window for Line 1. The 'Item' is '160-HPSW' and the 'SubType' is 'Parts'. The 'Item Source' is 'Inventory'. The 'Taxable?' checkbox is checked. The 'Stocked?' checkbox is checked. The 'Item Unit' is 'Ea.'. The 'Item Type' is 'Material'. The 'Quantity' is 1.000. The 'Regular Price' is 60.00. The 'Discount' is 0.000%. The 'Discounted Price' is 60.00. The 'Extended Price' is 60.00. The 'Cost' is 20.00. The 'Extended Cost' is 20.00. The 'Inventory Account' is 1300. The 'Sales Account' is 4010. The 'Cost Of Goods Account' is 5010. The 'Vendor Number' is 'ACES'. The 'Vendor Item Number' is empty. The 'Display Line' is 1. The 'Serial # Required' dropdown is set to 'No'. The 'Serial #' field is empty. The 'On Contract?' dropdown is set to 'No'. The 'Vendor Purchase Order' field is empty. The 'Truck' field is empty. The 'Dept' field is empty. The 'Job Cost Code' field is empty. The 'Print?' dropdown is set to 'Yes'. The 'Manufacturer' field is empty. The 'Model' field is empty. The 'Ok' and 'Cancel' buttons are at the bottom.

On the Tech Field Invoice, a new section has been added to show these totals. The number of line items showing before going to the supplemental second page has been expanded from 13 lines to 15.

Sales Subtotals	Labor	Equipment	Parts	Refrigerant	Travel	Freight	Other
	\$75.00	\$0.00	\$60.00	\$0.00	\$0.00	\$0.00	\$0.00
Equipment Worked On:				Time Tracking:			

Existing Tech invoices have been already modified on your systems. Remote systems will need to pull the System Reports in the Refresh Files to get the current invoice template that has been modified.

**Note:**

If your system is not loaded with the Wal-Mart invoice template, please contact Is2 customer support and we will load the template into your Central system.