

### Notes:

#### Advanced Order Entry and Invoicing

- ☒☒ Rebilling a credited invoice
- ☒☒ Invoice adjustments
- ☒☒ Copy an Order function & usage
- ☒☒ Adding discount/retention line to invoice
- ☒☒ Advanced notepad usage
- ☒☒ Line item commissions and tax
- ☒☒ Credit invoice functions
- ☒☒ Prior period invoice editing
- ☒☒ Partial job billing for large job tracking

#### Customer Management

- ☒☒ Temporary customer number assignment
- ☒☒ Duplicate customer record consolidation techniques
- ☒☒ Inspection & Daywork customer consolidation and benefits
- ☒☒ Implementing a credit hold system
- ☒☒ Advanced note pad usage including automatic attention lines and work order/invoice only comments at the customer level

#### Policy Table Settings

- ☒☒ Advanced product line setup
- ☒☒ Special scat (service category) setup
- ☒☒ Payment terms options
- ☒☒ Tax code and tax rules options
- ☒☒ Defining w/o & invoice by branch/company
- ☒☒ Configuring salesmen information
- ☒☒ Setting default commission values for inspections
- ☒☒ Mass invoice comments by product line
- ☒☒ Special overtime rates and other conversion factors

#### Contract Pricing and Special Price Lists

- ☒☒ Cost plus pricing
- ☒☒ Percent off list pricing
- ☒☒ Last invoice pricing
- ☒☒ Dollar break pricing
- ☒☒ Pricing by item, material code, and product line
- ☒☒ Automatic PO assignment
- ☒☒ Automatic date range enforcement for PO's and contract codes
- ☒☒ Including other contracts within a given contract
- ☒☒ Contract list printing

#### Reporting

- ☒☒ Sales reports
- ☒☒ Service/Inspection reports
- ☒☒ Item/Inventory reports
- ☒☒ Customer reports
- ☒☒ Order reports

Note:

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#### Inspection Schedules

- Contract pricing for inspections
- Zero dollar work order tracking
- Estimated hours vs. Actual hours tracking from the inspection schedules
- Generated work order options
- Supplemental work orders
- Automatic invoice generation
- Work order grouping by scat codes
- Service item cancellation
- Note pad usage
- Reset schedule price

#### Special Considerations For Extinguisher Operations

- Item management for extinguishers
- Automatic price list generation and enforcement
- Special two page work order forms and usage

#### Proposals

- Basic proposal usage
- Pricing options for salesman
- Automatically converting proposals to work orders
- Proposal printing

#### User Level Security

- Administrative level users
- Creating easy to manage sub-level's of users
- Cloning and modifying existing users

#### Item Part/Information

- Adding new items to database
- Setting up a new vendor
- Printing lists of items by product code/vendor
- Customizing your item database

#### Importing and Exporting of Data

- Exporting customers to spreadsheets
- Exporting schedules to spreadsheets
- Exporting sales journals to spreadsheets
- Exporting items to spreadsheets

