Service Call Release Notes

Version 4.0.5

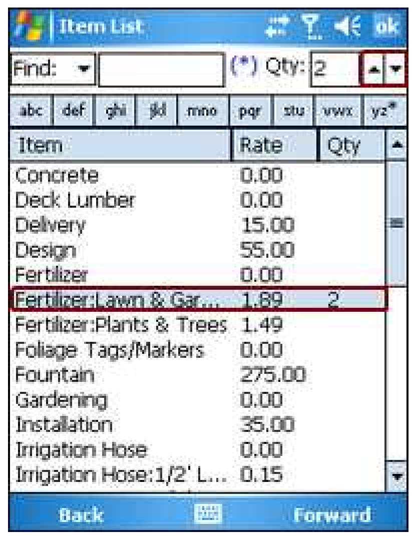
Windows Mobile

- **Adding Items to Invoices and Estimates:**

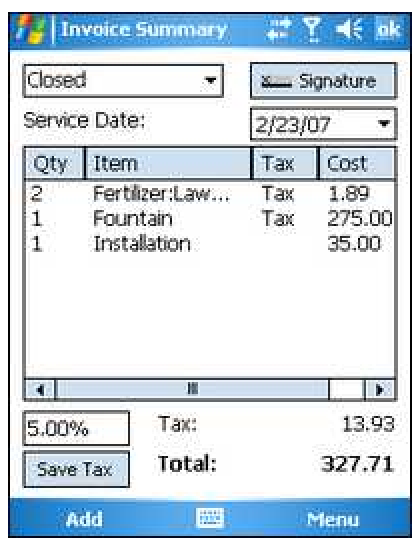
  When creating invoices or estimates, you are now able to add **multiple items** in various **quantities** from one screen.

  From the **Invoice Summary** screen, tap on **Add** in the lower left corner.

  This will launch the **Item List** screen. Proceed by **tapping** on an item to select it and then enter the **quantity** desired by using the **up** and **down arrows** found at the top of the screen to the right of the **Qty** field, as seen in the second screen below. Continue adding as many items and their respective quantities as needed. When finished, tap on **ok** in the upper right corner.



You will be returned to the **Invoice Summary** screen, where you will now see all of the items chosen and the quantities entered, as illustrated in the screen to the right.



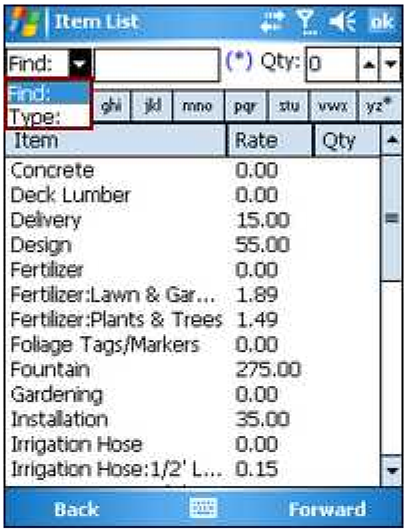
- **Searching for Items:**

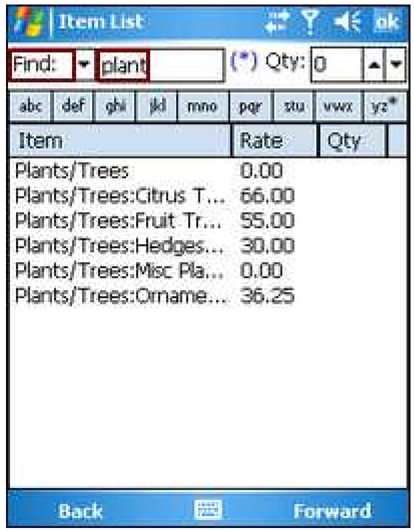
  There are two methods available for finding items from the **Item List** screen, **Find** and **Type**, as described below.

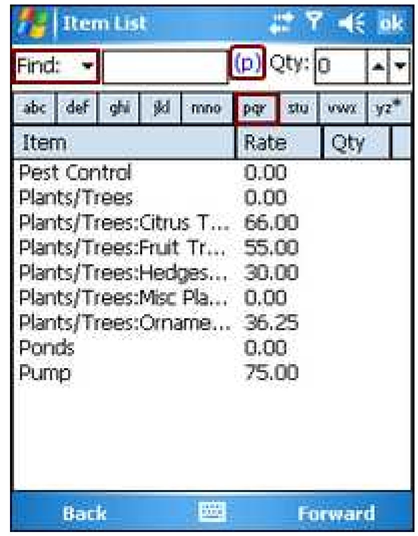
  When you select **Find**, you can locate an item in one of two ways:

  - Use the keyboard to enter the name of an **item** in the field located to the right of **Find**. In the following example, **"plant"** was entered, which resulted in the list of items seen in the second screen shot below **or**

  - Use the **alphabetic segments** found below **Find**. In the third screen seen below, the letter **"p"** was chosen. As a result, a list of all items beginning with that letter will be displayed.



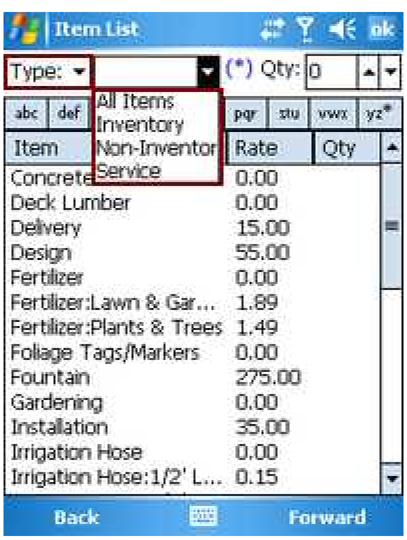


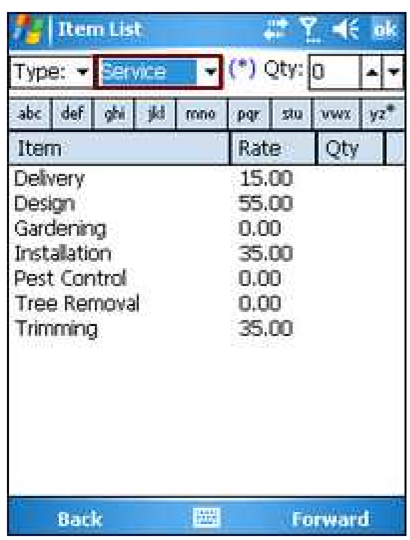


  When you choose **Type**, you will use the **drop down arrow** to the immediate right to select from a list of options, as seen in the first screen below.

  Please Note: The initial screen defaults to **All Items**.

  After choosing a **Type**, such as **Service**, only those items that fit that classification will be displayed, as seen in the second screen shot below.



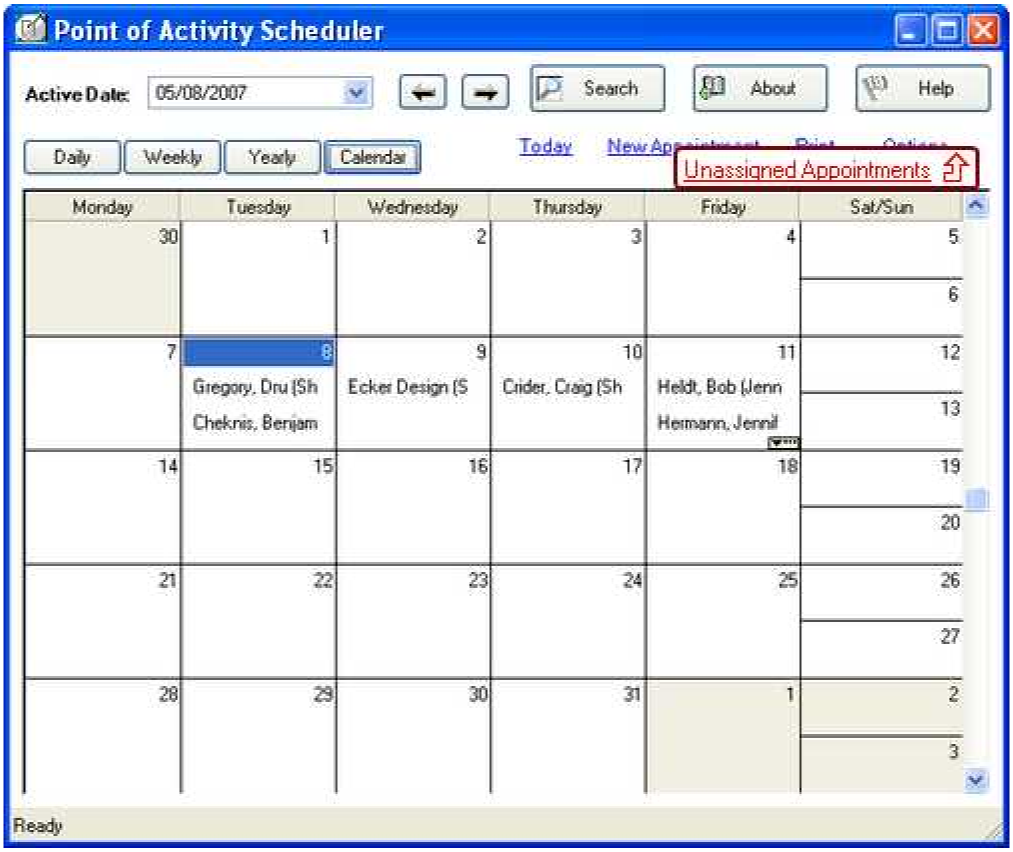


Scheduler

- **Assign a Group of Appointments**

When an Employee becomes inactive, the appointments that were assigned to him or her need to be **reassigned** to an active Employee. In previous versions of **Service Call**, all appointments had to be reassigned at the same time. With **Version 4.0.5**, you can now assign **groups** of appointments.

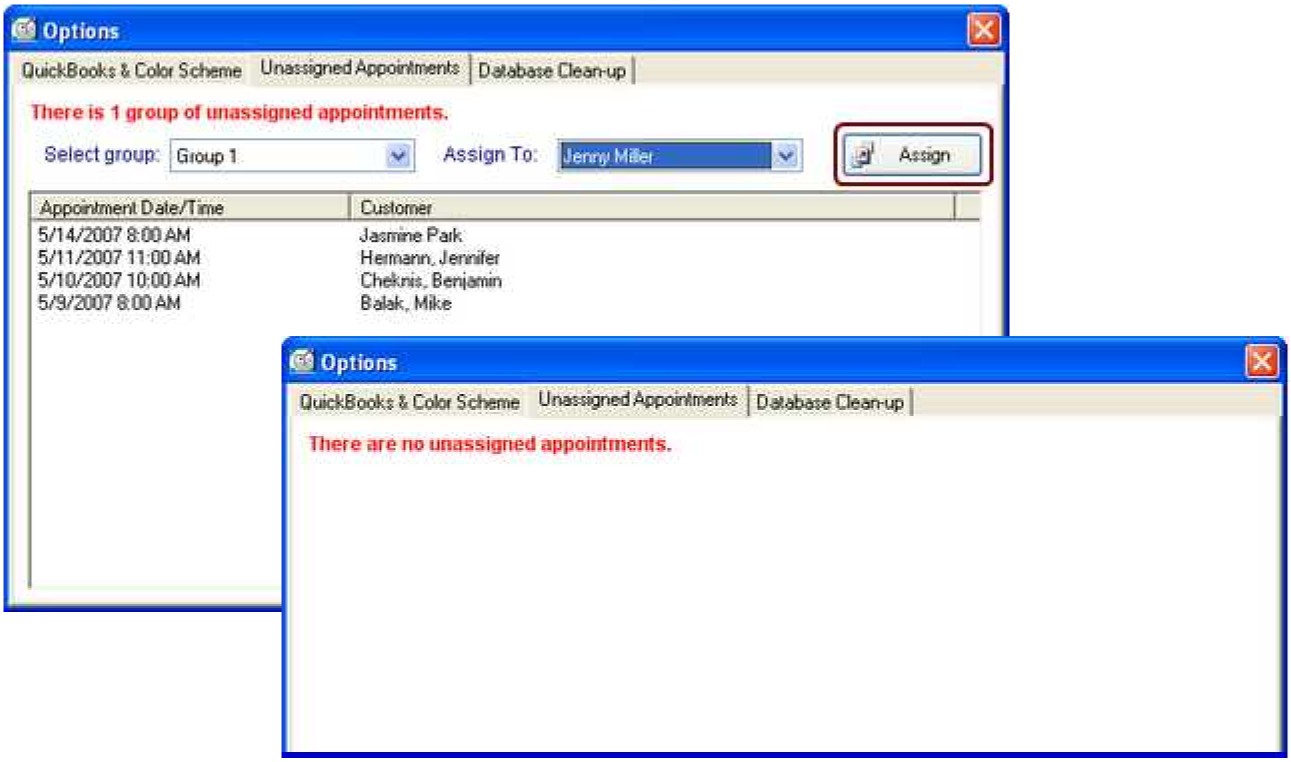
An **Unassigned Appointments** notation will be displayed on Scheduler's Calendar screen when there are appointments that are unassigned, as seen below. Begin by clicking on this link.



Doing so will launch the screen seen to the right.

Continue, by using the **drop down arrow** to select an active Employee to whom you wish to assign this **group** of appointments.

After the Employee has been chosen, click on the **Assign** button. The Unassigned Appointments Options screen will indicate that there are no unassigned appointments remaining, as seen in the second screen below. Click on the **X** in the upper right corner to close this screen. You will be returned to Scheduler's Calendar, where you will see that this group of appointments has been reassigned.

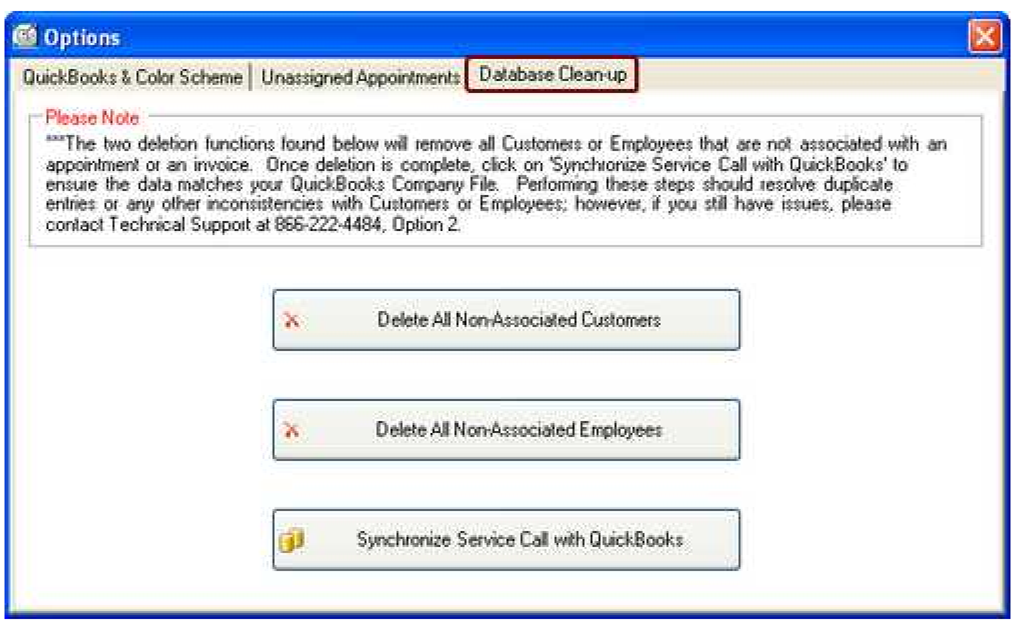


- **Clear Duplicate or Non-Associated Customers and Employees**

A database clean-up function has been incorporated into this latest version, which will properly remove duplicate or non-associated customers and employees. To access this feature, click on **Options** in the upper right corner of Scheduler's Calendar screen.

This will launch the QuickBooks & Color Scheme Options screen, where you will click on the third tab, **Database Clean-up**.

The screen seen to the right will be displayed. Please read the instructions closely to ensure that deletions are performed properly and the data matches your QuickBooks Company File.



- **Customer Name Change in QuickBooks**

  In previous versions of **Service Call**, changes made to a Customer's name in QuickBooks were not properly handled.

  In **Version 4.0.5**, when a Customer's name is changed in QuickBooks, it will be reflected in **Service Call** the **next time** the QuickBooks sync is run.