



What's New in ESC Version 10

Here is brief list of the new features that have been added to ESC Version 10. We hope you enjoy it!

Redesigned customer entry screen

Version 10 includes a complete overhaul of the Customer Entry screen. While all the key features are still there the layout has been streamlined and new features added to give you even better control of your data.

- Support for 6 contacts per location. Each contact can have their own name, phone, extension, salutation, title & email. Keeping in touch with the correct contact at your customer's site has never been easier.
- Improved mail merge capabilities. When creating a merge letter for a customer you can now select the exact contact you want to send it to by clicking the letter icon to the left of the contact's name on the Location tab.
- Date Added field now included on the General tab. This field will fill out automatically when you enter new customers so you can see how exactly long a customer has been with you. This filter has also been added to the Report Generation screen so you can easily see how many new customers you've added in a certain time frame.
- Salesperson field added to the General tab. This allows you to attach a salesperson to a customer so that all invoices for that customer will automatically be assigned to the selected salesperson.

Ability to merge customers and locations

Make duplicate customers a thing of the past with the ability to merge one location with another. This can transfer all equipment, history, dispatches, service agreements, attached documents and even invoices from one location to another - so nothing is ever lost or needs to be retyped. This feature is also perfect for transferring a location from a builder to a home owner.

Enhanced duplicate checking

While the ability to merge customers is great, it would be even better if you never needed to do so. ESC Version 10 is much better at catching duplicate customers before they are created, even if the address is not exactly the same!

Make customers and locations inactive

Now it is easy to prevent particular customers or locations from showing in lists and on reports. This gives you the ability to effectively delete a customer while still making sure all of your historical reports and data is unchanged.

Enhanced customer searches

Finding the right customer is now faster than ever.

- Customer fields now support auto-fill which will display the customer's name as you start typing. In most situations there is no need slow entry down by bringing up a secondary search box.
- When you do need to search by something other than the customer's name, however, ESC is ready. The new customer search screen is both easier to use and more powerful. New search parameters include contact names and email addresses.

Import zip codes

Don't worry about misspelled city names anymore. ESC now includes a full zip code database. Simply import the zip codes for the states where you work and ESC will automatically pick the correct city and state for you when you enter a new customer's or vendor's zip code.

Redesigned dispatch entry screen

Like the customer entry screen, the dispatch entry screen has also received a lot of attention.

- Attached equipment now is displayed on a separate tab. This allows equipment to be attached, added or even edited without leaving the screen.
- Price field added to Parts tab. Now you can put prices on parts attached to the dispatch. These parts and prices can be transferred to the mobile clients and printed on dispatches.
- Enhanced capabilities in the dispatch note field include the ability to add a date and time stamp to any notes. Full spell checking is now included as well.

New dispatch layout designer

Place your logo on your dispatch. Include an area for your technicians to write down what they did. Now you can rearrange your dispatch ticket any way you want with the new dispatch layout designer. We have even given you a few templates you can use to get started on our knowledgebase.

Radically redesigned dispatch schedule

Designed to be much easier to use, this screen now boasts the ability to quickly look through dispatch notes for a whole range of dispatches without ever leaving the screen. An improved layout and default sort option keep dispatches from appearing multiple times.

Search feature added to the Electronic Dispatch Board

Version 10 includes a new search field on the Electronic Dispatch Board. Now you can easily find any dispatch by entering any part of the location name or address. This is a great way to see what times are available if a customer needs to reschedule a call.

Inventory Enhancements

The inventory entry screen is now a separate window that can remain open even when modular screens, such as the Receive Items screen is open. This enables you to enter parts on the fly while doing anything in ESC. Other items included in the redesign include:

- Tab layout now groups similar items together and makes the screen easier to use.
- Alternate parts now are displayed as a tab on the screen.

Other inventory enhancements include:

- When searching for inventory parts, inactive parts are hidden by default. Checking show inactive parts while searching will still allow them to be found.
- Added the ability to import all the parts ESC thinks are in a warehouse onto the Adjust Inventory screen. The quantities can be automatically set to zero as well making this the perfect tool for entering physical inventory counts.

Enhanced reporting capabilities

ESC Version 10 now supports the ability to have an unlimited number of reports open at once. This makes comparing one report to another a breeze. We have also improved the way reports are closed. In previous versions closing a report would take you back to the criteria selection screen. Now closing reports - closes reports. The report criteria can still be changed easily when previewing the report by clicking the Filters button in the toolbar.

Service agreement updates

- Parts added to service agreement tasks now flow automatically to the Parts tab on the dispatch with a zero price. This ensures the technician knows what they need to take with them to complete the job. The parts will also flow over to the invoice that is created from the dispatch so the parts will be properly relieved from inventory as well.
- Added ability to post agreement dispatches for a particular customer. This makes combining service work with planned maintenance quick and easy.

Mobile client changes

- Inventory items entered on the Parts tab of the Dispatch Entry screen now automatically flow to the invoice on the mobile client. This only happens for the first technician who downloads the dispatch.
- Service agreement information is now sent to the Dispatch tab on the mobile client. This allows your technicians to see what kind of agreement the customer has as well as showing all sub-tasks.

Ability to modify invoices posted to QuickBooks that no longer exist

It is a common mistake to delete an invoice in QuickBooks that was posted there by ESC. When this happened in previous versions your only option was to create a credit memo for the original invoice, then create a whole new invoice. In Version 10, we let you recover from this error gracefully - only asking you to make sure all the transactions that were sent to QuickBooks are deleted. These transactions include the invoice itself, the journal entry made for the cost of any material or other items and any payments.

Web Front Office overhaul

The Web Front Office received a major facelift in this version. The entire interface has been updated to look more modern and a ton of new features have been added as well.

- Brand new Connections Server. This interface has also been completely redesigned to make it easier to use. A simple status light makes it easy to see if any portion of the Connections Server is not configured correctly.
- Added the ability to run reports. Now you can run multiple reports directly from within Web Front Office.
- Added numerous setup screens. Now you can add technicians, configure dispatch boards, and add inventory items all through the Web Front Office.
- Added the ability to recall existing invoices and change/print them.

- Dispatch ticket printing is now supported. Now you can print dispatch tickets right in the field.

Accounting update

- Added ability to print [1099 Forms](#).
- Upgraded the direct deposit setup screens to make them even more compatible.