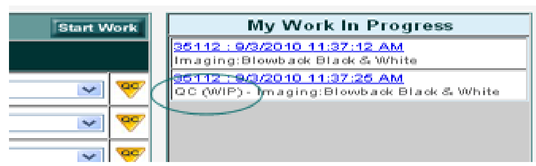
# PTS Release Notes for September 04, 2010

- Sales Rep name and cell number has been added to work orders
- QC Behind the Operator:

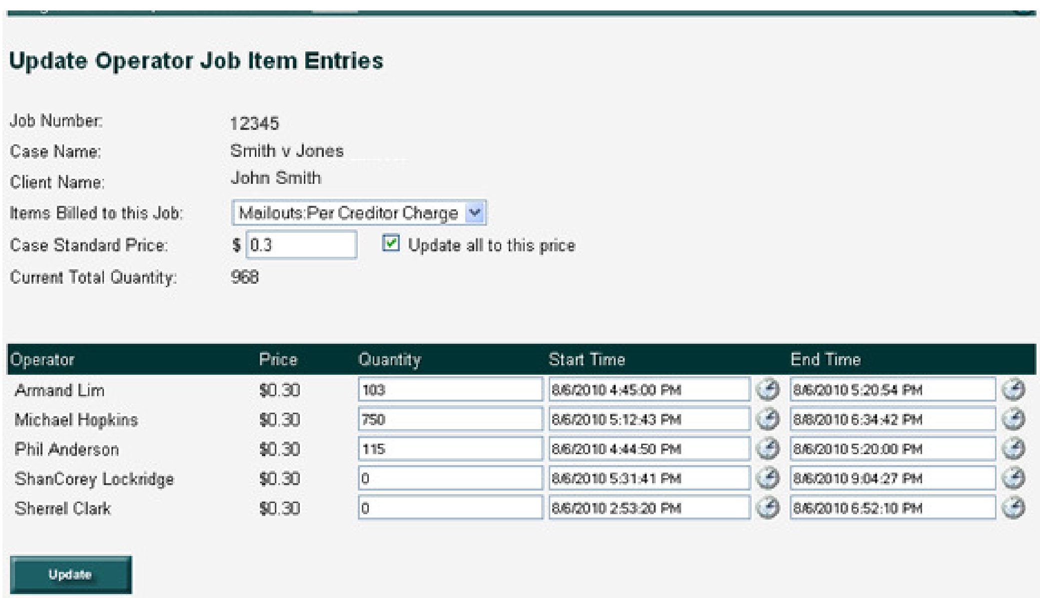
  Changes have been made to the QC process that will allow the QC effort to begin on work in progress. For example, this will allow your operators to effectively QC directly behind (and at the same time) someone who is scanning.

  The functionality is the same as you are accustomed to, however QC of work in progress items will be denoted with a “WIP” prefix. Work in progress items available for QC will be listed at the bottom of the popup screen that appears when the QC icon is clicked from the operator’s home screen. Completed QC items will appear in the job once the work in progress item has also been completed. IMPORTANT: Should the work in progress item be removed by any operator, the QC item will also be removed from PTS. If a user attempts to stop work on a QC item which, as a result, has no corresponding work in progress item, they will receive an error.
- A navigation change has been applied to the creation of new jobs so that the job edit screen immediately appears with the new job number, as opposed to redirecting to the home screen.
- A “New Work Order” button has been added to the case edit screen, open job list section, which will take the user to the Create New Work Order screen, and will pre-populate the firm and case name.
- A new “Restricted Operator View” checkbox has been added to the “other user view settings” section of user maintenance. If checked, the selected user will have the following hidden from the operator home screen: revenue numbers, bonus numbers, firm names, firm abbreviations, client names.
- The Work In Progress report has been modified to display those users who are not clocked into any jobs. It will also display the last time that they completed work on a job. In addition, a “delete” option has been added to the existing work in progress section that will allow a work in progress item to be removed manually. This will help managers who need to remove an operator’s work in progress, for example when they forget to stop their work before leaving for the day.
- Daily revenue subtotals have been added to the Operator Revenue report.
- The work order has been modified to include an “Invoice Notes” field. We found that reps often need to include certain verbiage on their invoices, and those instructions were being lost in translation throughout the course of a project. Any information included in this new field will automatically transfer directly into any new invoices whose jobs are tied to the work

order. The invoice notes can be edited prior to invoice creation as you are accustomed to seeing.

- Progress report items have been tied into the billable items in your jobs. Your operators have the option to associate the items they are billing to a progress report item when adding or editing their work, using the “Prog Prt Item” drop down menu. If no progress report has been tied to the job, this list will be empty. The “Job Items” table on the job edit screen will display any associated progress report items.
- Two new reports have been added to the Reports → Management section to provide feedback based on the above change. The “Progress Report Item Billing” report provides an itemized breakdown of billing for a set of progress report items. This grouping is based on the users' "Prog Rpt Item" selection when entering billable work to a job. The “Progress Report Operator Billing” report provides an itemized breakdown of billing for a set of progress report items, and is subtotaled for each operator associated with a given job. This grouping is based on the users' "Prog Rpt Item" selection when entering billable work to a job.
- The ability to mass update a job’s items has been added to the job edit screen. This will allow you to update a single item across all operators at one time, rather than opening each operator’s entry one-by-one and updating prices, quantities and/or start and end times. A new “Mass Edit Items” button, found next to the “Edit Item List” button, will take you to this page.


**Update Operator Job Item Entries**

Job Number: 12345
Case Name: Smith v Jones
Client Name: John Smith
Items Billed to this Job: Mailouts:Per Creditor Charge
Case Standard Price: $ 0.3 ☑ Update all to this price
Current Total Quantity: 968

| Operator | Price | Quantity | Start Time | End Time |
|---|---|---|---|---|
| Armand Lim | $0.30 | 103 | 8/6/2010 4:45:00 PM | 8/6/2010 5:20:54 PM |
| Michael Hopkins | $0.30 | 750 | 8/6/2010 5:12:43 PM | 8/8/2010 6:34:42 PM |
| Phil Anderson | $0.30 | 115 | 8/6/2010 4:44:50 PM | 8/6/2010 5:20:00 PM |
| ShanCorey Lockridge | $0.30 | 0 | 8/6/2010 5:31:41 PM | 8/6/2010 9:04:27 PM |
| Sherrel Clark | $0.30 | 0 | 8/6/2010 2:53:20 PM | 8/6/2010 6:52:10 PM |

Update

To update an item, first select an item from the ‘Items Billed to this Job” list. The standard price for the case and total quantity billed to the job will appear, as well as a list of each operator’s entry for that item (as seen above). If you would like to update the price of all items, leave the “Update all to this price” checkbox checked. To leave prices unaffected, uncheck this option.

The user may then individually update each operator's quantity billed. As with the current work add and edit screens, items that have been designated as "hourly" items can be calculated based on start and end times. Click the "Update" button once all changes have been made to be redirected back to the job edit screen.

- The ability to merge two cases within the same firm has been added to PTS. Working similar to the combine jobs feature, this new logic will completely merge one case and all of its data into another so that they become one case. You can find this button under Tasks → Firms & Cases → Merge Cases. This could be very useful when a new case is created with slightly different spelling, when in reality that case already existed in PTS. If the "duplicate" case had jobs created in it, you could combine the cases so that you only have one case in your system.
- The charts on the various home pages have been changed to display departments and users with negative gross margins.
- The charts on all home pages are now hidden by default. At any time, you can display your chart dashboard by clicking the chart icon found directly below your company name on home page. Here is a sample of the new icon.
- The columns on the project manager, account rep and operator page now have sorting ability.
- Instructional text-fields on the work order add screen have been expanded in size width.
- The default date and time due of work orders and jobs has been enhanced to detect end of business days and upcoming weekends. First, a two hour buffer has been added when a job is being created. For example, if the current time is 1pm, the default time due will be 3pm. Second, if the current time is later than 5pm, Monday thru Thursday, the default time will be 9am the morning of the following day. If the current time is later than 5pm on Friday, the default time will be 9am of the following Monday. As usual, the date and time due can be updated to accommodate any value you desire.
- The job number data field has been moved to the top of the work order edit/print/approval screens and has been bolded.
- Your logo has been added to the printable quote report.
- The tech time tracker report has been modified to include inactive employees, as long as they have a goal for the time period of the report. Therefore if you deactivate an employee, their tech time revenue will continue to be included in the report if they had monthly goals for the year.

- A new login page has been created for PTS. Username and password recovery has been added as well. On this new page you will find several new features. Doculogix will be creating training videos to assist you in training new employees and to help answer some of the frequently answered questions. We will also be holding periodic webinars which can be found on the right side of your login page. The first webinar will cover the updates included in this release. To register, click on the link in the webinar section to send an email to our training team. Additionally, a history of PTS release notes will be provided in the right pane of the window.
- The ability to enter partial hours for holiday entries has been added to both the manual holiday entry logic and the automated holiday scheduler.
- The date of vended job items was originally designed to be auto-stamped in the PTS database. This was by design. After customer feedback, we found that backdated vended items' revenues were being displayed in the current month despite the intention to back-date the data. Therefore, when adding or editing an item to a PO, a new date text box has been added to accommodate back-dating of items.

<u>Bug Fixes</u>

- Jobs with multiple POs and internal work were not calculating the "total revenue" number displayed on the job edit screen correctly. It was displaying the sum of internal work and the last PO created once that PO's items were marked as received – corrected.
- Column sorting on Revenue by Item Report linked to the Profit version of the report – corrected.
- Progress report edit screen not displaying all available items, only those in the categories that were previously selected when the prog rpt was created – corrected.
- Vacation accrual for the monthly setup was being inflated – corrected.
- Companies with multiple locations were receiving standard pricing approvals for their other locations, in addition to their own. Corrections were put in place to send approvals only to the location that the firm was tied to.