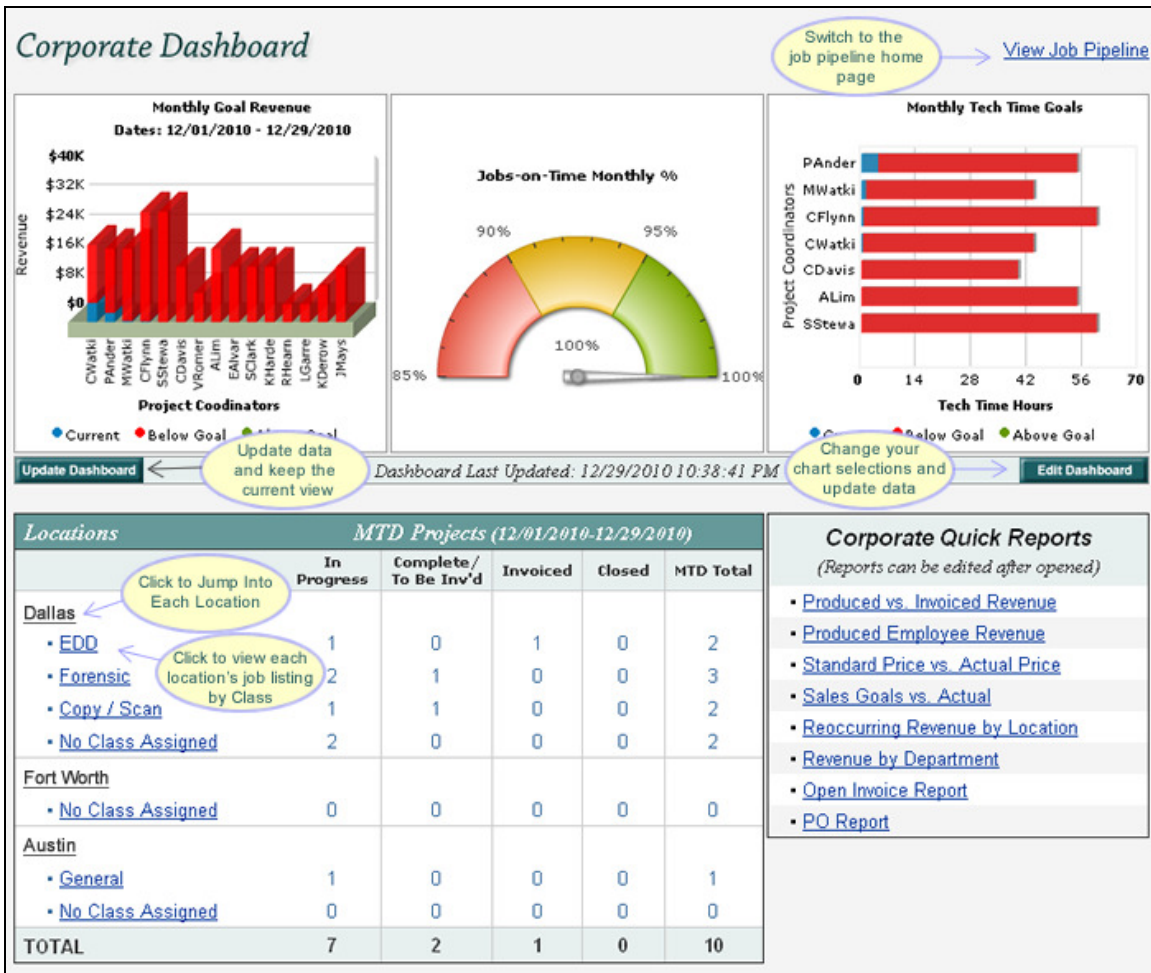


PTS Incremental Update – December 2010

- A new Corporate Dashboard has been created for those users with corporate view access, and is designed to provide the corporate user with a snapshot of activity among all locations within your company.

At the top of the dashboard you'll find an area for up to three charts. You may choose from 8 different charts by clicking the "Edit Dashboard" button below the right-most chart. These charts are designed to contain static data and do not automatically update themselves. Therefore you may periodically update the data displayed in each chart by simply clicking the "Update Dashboard" button below the left-most chart. The last time the charts were updated is displayed directly below the middle chart.



Below the series of charts you'll find a table containing a summary of your jobs month-to-date for each location and that location's Job Classes. Based on the date each job was created,

this table subtotals the number of jobs that are In Progress, Completed or To Be Invoiced, Invoiced, Closed, as well as a Month-to-Date total per Job Class. This data is real-time, up to the minute information.

Each location name is hyperlinked. Clicking on the location name will change your current view and redirect you into that location, just as it would if you were to change your location using the drop-down menu in the PTS Header. Each job class is also hyperlinked. Click on the class name to view a detailed listing of jobs by Class.

For your corporate reporting purposes, we have provided 8 quick report links to the right of the job summary table. Most of these reports will take you directly to a summary of data for all locations within your company without requiring you to fill out a search form or jump between locations. This data is real-time, up to the minute information.

Lastly, as a corporate user, you may choose whether you would like the Corporate Dashboard to be your home page or whether you would prefer to use the existing job pipeline. This option is found under the “Maintenance → Users/Operators → [your name] → Locations and Views → Multiple View Settings” section. No matter your choice, you can view the dashboard or pipeline by clicking the link at the top right of each of the two pages (corporate users only, see diagram above)

- The Case export utility (Tasks → Export PTS Data) has been modified to include the name of all sales reps tied to a given case and his or her sales percentage. Cases with multiple sales reps will be represented on one line per rep.
- We have added a “GL Code” to the job item maintenance section (Maintenance → Manage Job Items). This will allow you to enter your item codes from Quickbooks or other accounting software into PTS and have them push into the Job Summary for each job.
- A tooltip popup has been added to the “notes” links on all home pages and will display any existing notes for the job without requiring the user to click on each link. Note: Firefox may not display all information depending on the length of the note.
- A tooltip popup has been added to the Firm Abbreviation on the PC and Operator home pages that will display the full Firm Name. Further, on the operator home page where the case name is not listed, the tooltip will display the Case Name in addition to the Firm Name.

- When we added “processing locations” to PTS, we introduced a new incoming mail icon to the home page to designate those jobs that were sent to another of your locations for processing. In this update, we have provided that icon to the “sending location” as well such that you can easily see which jobs you have sent out for processing. Hovering over the icon will display the name of the location to which you sent the job.
- The Job Summary report has been modified to display a subtotal of revenue per location in the services summary area. This will allow companies with multiple locations that worked on a single job to identify what portion of the total services revenue came from each location. This data is pulled based on the primary location of the operator who entered the billable item into the job. Additionally, for those items that were assigned a GL Code in Job Item Maintenance (see notes above), the GL Code will be displayed in parentheses next to each item’s name.
- We received multiple requests to change the number at the top of the printable work order page to display the job number instead of the work order number. This change has been made.
- The bonus percent for each job item has been added to the full list view when working under Maintenance → Manage Job Items so that one can easily view bonus percentages without the need to click on each item name.
- Any invoice notes added into a work order have also been added to the job summary to assist those users who do not use the PTS invoicing features.
- A new filter has been added to the Revenue By Item Category report that allows the user to filter revenue by Sales Rep. This is useful to see what service categories your sales reps are actively selling.

### **Bug Fixes**

- The address listed on the printable Quotes (via What-If Wizard) was from the company record, not that of the location. This has been corrected to display the address of the location where the quote is created.
- An error occurred if a Case Name was not selected when creating a work order. This has been corrected and the user will be prompted to select a Case before proceeding.