PTS by Doculogix – 5/29/2010 Condensed Release Notes

New Functionality / Modifications:

- Yes, you're at the correct website! A new Doculogix website and PTS logo has been released with this v6.5 update.
- A new status has been added to PTS. In addition to "In Progress", "Redo", "On Hold", "To Be Invoiced", "Invoiced" and "Closed", now you will find a "Completed" job status. This new status is represented in its own table on the various home pages, along with the current "jobs" tables you're accustomed to seeing. Completed jobs will be excluded from overdue job notices, and the status was requested as a way to organize jobs that were ready to be delivered but not quite yet ready for invoicing. You may use this new status any way that it fits into your organization
- A new auto-email has been created for jobs whose status is changed to "To Be Invoiced". This email will be sent to an alias or string of emails as designated in the new field found in location maintenance.
- A new auto-email has been created for jobs whose status is changed to "Completed". This email will be sent to an alias or string of emails as designated in the new field found in location maintenance.
- The requirement to enter data into the various auto-email fields in location maintenance has been removed. Therefore you can selectively choose which emails you do and do not want to receive.
- Vended work has been added into the Sales Revenue Rankings chart located on the Corporate home page as well as the Sales Rep home page, and the "drill down" data has been updated as well. Initially intended to be an indicator of internal billing activity, this report now displays *all* revenue associated with a rep's jobs that is billed and dated during any given month.
- Firm and Client profile pages (edit screens) have been updated to show all unclosed jobs tied to each, respectively. Like the home pages, each job status is represented by a separate table.
- Revenue vs. Paid Invoices chart has been modified to read the revenue number directly from invoice amounts that were dated during each respective month, as opposed to total revenue billed. The reason for this change is to create a more accurate reflection of collection efforts against true invoices, not revenue that may be billed in one month for the previous month, and invoiced in yet a different month.
- A new work order approval short form has been implemented to speed work orders requiring approval. This serves two purposes: one, to speed the loading of the full work order by simply showing what was selected by the job's creator; two, to prevent accidental changes during the approval process. The short form work order will be displayed when a user first views a work order awaiting approval. The same buttons can be found at the bottom of the work order that allow for approval. However if the work order requires any changes prior to approval, simply click the "Edit" button to view the fully editable work order.

- Much like the approval process, when a user clicks on an approved work order, they will be taken to a new read-only short form rather than being presented with the full work order. This new page will also have an edit button at the bottom to allow for that functionality if required.

- The invoice number associated with each job has been added to the commission report detail.

- The following new search criteria have been added to the Invoice List report: Job Status, Sales Rep, Case Name.

- Statements in the client portal have been modified to display the grand total of invoices due. Statements have also been updated such that they display invoices based on “bill to” information.

- When a work order is created without requiring approval or is created by a sales rep, the work order number will be presented immediately after creation on the Search Work Orders page. This eliminates the requirement to perform a search to find the newly created work order number.

- The Job Class has been added to each operator’s home page.

- Ability to filter by Sales Rep has been added to Invoice Upload report.

- Paid invoices can be downloaded from the client portal (if you have uploaded them internally). Previously only unpaid invoices were able to be downloaded.

- Corporate and GM levels added to available people to which call ticket activities may be assigned. Previously only Business Managers could be assigned call ticket activities and this change will allow for a more collaborative collection effort.

- The label representing the disparity between each item’s standard price and quoted price in the What-If Wizard has been changed from “margin” to “difference” to avoid confusion.

- Territories have been added to PTS to allow grouping of your firms. A territory must be assigned to each firm in your system. We have created an “Unassigned” territory in your system and assigned all firms to this default territory. Territories are managed by clicking the Territories button at the bottom of the “General” maintenance section. Furthermore, you can easily see how your reps are assigned to firms and their territories using the Sales Rep – Firm Relationship report (located by clicking Tasks → Reassign Firms/Cases → View All Firm – Sales Rep Relationships).

- Deleting a portion of the work order, if tied to additional items, will display those item associations, such as which job the work order is tied to.

Bug Fixes / Corrections

- Work orders were appearing twice in work order listing if the associated job had split sales reps – corrected.
- Job deletion not deleting delivery receipts – corrected. This was transparent to the end user and did not affect any functionality.
- Drag and drop sorting of the progress report items did not function correctly in Internet Explorer 8 – corrected.
- Invoice deletion in some instances not removing associated payments, thus inflating payment trend chart on corporate home page – corrected.
- What if wizard price quotes of $0 were being omitted from printable what-if and quote reports – corrected to include those items such that discounts can be shown to clients.
- Closing dates entered for cases were unable to be removed – corrected.
- Daily production report inflating weekend numbers on Friday thru Saturday in some instances – corrected.
- Updating a progress report in some cases wiped out previously saved delivery dates – corrected.
- Last Login times were displayed in central time – corrected to display in your local time zone.