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## FOCUS release notes - version 8.4

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- **Job estimates** – Allow a new service call status code of “Estimate”. When this status is assigned to a service order, the inventory items on the call are not committed. This will allow a detailed estimate to be built, printed, and given to a customer. Once the estimate is accepted, the service call status can be changed, allowing each part assigned to be committed from the proper inventory location(s). A work order that has not been invoiced can be forcibly changed back to an estimate, thereby uncommitting the parts in inventory.
- **Compatibility with accounting platform releases** – Several releases of our compatible accounting packages have necessitated changes to maintain Focus compatibility. Version 8.4 is compatible with versions 7.5.10-7.5.14 of CounterPoint, and versions 11.2 and 11.4 of Passport Business Systems.
- **Correction for CP 7.5.10** – Correction to an error when interfacing Focus version 8.3 to version 7.5.10 of CounterPoint. During posting, an error 114 in the program “extfh” could occur. This has been corrected.
- **Inventory relief of alternate units** – Ensure that the correct quantities of inventory items are relieved based on the conversion factor of the alternate unit.
- **Commissions by line** – Service commissions are now available by line item. Each labor line and/or part line can have a salesperson and commission amount assigned. At post time, this information will become part of the commissions due.
- **Estimated labor hours** – Allow entry of an estimated labor hours by each labor line item. This field can then be used to compare the time estimates with the actual labor time spent.
- **Create service addresses from ship-to file** – CounterPoint version – A new utility appears on the Focus file utility menu called “Import Ship-to’s”. When invoked, this utility will give the opportunity to create a Focus service address for each ship-to address stored in CounterPoint in the AR Ship-to address file.
- **Correction – select for billing** – Fix problem that could cause the application to hang if the service call “select for billing” screen is filtered by bill group.
- **Correction – call history lookup** – When looking up service call history, an issue could cause the application to hang if the selection is filtered by address and serial number. This has been corrected in this release.
- **Service call invoice printing** – When progress billing, do not print any customer equipment on the invoice if no line items for the task are being currently billed.

- ***Correction, extra page feeds during invoice printing*** – Correct condition that could cause a large number of page feeds when preparing to print the invoice totals section.
- ***Service call tax code for post-to customer*** - When a post-to customer is assigned to a service call, a message is now displayed asking the user if they would like to change the tax code. If the user elects to change, the tax code of the post-to customer is then put into the call record.
- ***Transferring service call to POS*** – Multiple enhancements have been added to the process of transferring a service call to CP Point of Sale for billing.
  - Keep track of customers added on the fly during work order entry for later creation of a POS order. This properly sets up the field ps-hdr-new-cust-flg in the PS header record
  - Restore the Focus item mapping record, after tech names are read. Formerly, additional charges could be mapped to an invalid item number if labor was on the call. Also, properly calculate the number of PS lines when invoice notes are added to the ticket.
  - Use the keyed service call additional charge description as the primary line item description for additional charge items.
  - If a labor work description exists, transfer as the line item description, preferentially to the tech name.
  - Use the address name and address info from the service call, instead of taking from the customer file.
- ***Correction to service call F9 lookups*** – CounterPoint only. Ensure that codes looked up during service call entry allow the use of F9 to show the lookup window. Previously, the lookup icon did not appear next to all of codes that could be looked up.
- ***Service call profit analysis*** – Correction to the accumulations of labor charges and costs in the service call profit analysis report, when the selection criteria includes service tech ID as the secondary sorting option.
- ***Lookup model codes by description*** – Enhance to F9 lookup of Focus model codes to allow sorting and lookup by code, model, and now model description.
- ***Service call parts warehouse reassignment*** – Allow item warehouse reassignment to match the latest added technician. If a new tech added to a service call has a default warehouse, the user will be asked if the inventory location should be changed for existing items on the call.
- ***Persistent schedule board filters*** - Save the schedule board filter setup by user, so that the schedule appears the same upon re-entry for the same user.

- ***Correction, system history line cost*** – Correction to invalid cost calculation, when creating system history lines for service work order parts. The cost put into the SA-LIN-COST for work order parts used was the extended cost instead of the cost per unit.
- ***Line item tax*** - Process service call item tax codes to accommodate the recent requirement in Puerto Rico to print city tax as a separate invoice line.
- ***New service call form selections*** – Include selections for customer type and call schedule date for service call header information. Also add selections for base tax and line tax for the service call totals section.
- ***Focus export file utility*** – Added the ability to export for upgrade to ServicePoint
- ***Lookup order lines from customer equipment*** – Allow the use of PageUp/PageDown to scroll through serial numbers, for order lines with more than 28 serials assigned.
- ***Correction: credit problem override*** – Ensure that pressing escape at the credit override password does not allow service call entry.