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# FOCUS release notes - version 8.1

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- **Technician categories/skill sets** – Allow definition of technician categories, and subsequent assignment to Focus service techs. Multiple categories are allowed for each technician. Filters can then be set in scheduling/dispatching to limit display and selection of techs by type and/or ability. Technician categories can be used to schedule only techs with a particular skill, or in a specific geographical location. Additionally, techs can be excluded from scheduling based on their categories (for example, category of *terminated*)
- **Customer equipment tag numbers** – Added a new field to Focus customer equipment called “Tag ID”. These tag numbers can be used as an easy way of reliably identifying equipment on a site, using company assigned ID’s. The value entered must be unique for equipment within the same customer and service address. Lookup of customer equipment by tag number is now allowed during service call entry.
- **Multiple sorting/grouping selections for service call analysis** – An additional option has been added to the service call profit analysis report to specify a second “select/order by” item. The existing report can be run by either customer, equipment type, invoicing code, problem, work category, equipment category, or service tech. An additional option has been added for a second set of criteria to sub order/total. For example, invoicing code within technician, problem within customer, etc.
- **Customer equipment notes** – Allow notes to be attached to individual pieces of customer equipment. These equipment notes can be printed on the contract invoice, appear during service call entry as a dispatch note, or can be entered for internal company use only.
- **Allow cash customer calls with balance due** – CounterPoint version only - Allow saving of a call as “ready to invoice” with a balance due, with restrictions. A call that is filed as “ready to invoice” that has a balance due for a cash customer (non-AR), can *ONLY* be selected for POS transfer. Since the cash customer cannot have a balance due open item, direct invoicing of the call will not be allowed. This will force the CP ticket entry program to assume the responsibility for recording payments made for the work order.
- **Service call Quick Entry** – A new option exists while positioned in the customer number on the service call entry screen: *F7 = Quick entry screen*. Using this option allows switching to quick call entry mode and back to full entry mode. Using quick entry mode enables the following time saving features. After selection of the customer, using any of the available search methods, the focus is placed directly into the service address ID field, defaulting values for the call #, date and time. After entry of the service address, the user is taken directly to call equipment entry. Then proceeding to extended data entry, the call dispatch note and any user defined fields are entered. The work order print window is then presented, and the call is automatically filed (saved).
- **New selections in Focus forms definition** – New selections for the header section of service call forms include the customer category, call equipment warranty start date, and the call

equipment tag ID. New selections for the line item section of service call forms include the item bin numbers for parts, and the item “regular price” (item price 1).

- **Labor notes on WO's and invoices** – Correct processing of labor notes during service call forms printing. Include the service call labor notes that are specified to be printed on the various service call forms.
- **Batch printing work orders** – Expand the selection criteria available during batch work order printing. New selection include: technician ID, date range, tech date to use, call status, and technician status.
- **New registration** – A new, version 8.1 specific registration key is delivered with each Focus system. The utility *focusreg*, installed with this version, is used to enter the new key for Windows and UNIX/Linux systems. The registration keys for this version have been simplified.
- **System history customer number** – If using a post-to customer for service calls or contracts, create the system history using the post-to, rather than the actual service customer.
- **Note printing on forms** - Avoid moving the low-value present at the end of note lines to the print line. Certain printers would create graphic characters ( ) out of them.
- **Contract roll-up meters** – Allow definition of contract level meters. Individual equipment meters may then be defined to “roll up” into the contract meter for billing purposes. At contract billing, the aggregate amount for all of the included equipment meters is used to calculate average billing amounts. This new feature requires the Focus metered equipment option.
- **Labor schedule date default** – If entering call maintenance from the schedule/dispatch screen, use the current schedule date for the default labor dates, rather than the current date.
- **Allow changes to the customer equipment model** – The customer equipment *model* field can now be modified as a protected change. This allows corrections to the model without having to enter a new equipment record, then deleting the incorrect record.
- **Contract billing tax code by service address** – Allow assignment of the contract tax code at the contract level (as it works now), or designate the tax code for each individual piece of equipment to be assigned from the equipment’s service address record. This allows calculation of the tax amount (and GL account number) based on the individual equipment’s location.
- **Equipment service cost entry for contract billings** – Allow entry of a cost amount entry for each piece of equipment on a contract. This allows a predetermined offsetting amount to be posted to the general ledger for cost of service to that equipment for the duration of the contract period.
- **Contract sales account number by equipment** – Each piece of equipment on a contract may now have it’s own sales account number. Prior versions of Focus only allowed a single sales account to be assigned to the entire contract.
- **Allow invoicing from multiple workstations simultaneously** – Use a bill group indicator to allow separation of service call invoice batches. This accommodates simultaneous call billing

functions from multiple workstations. Each workstation will be limited to invoicing of calls that have been selected using the pre-selected bill group. This modification affects the following areas: Service call billing selection, Billing edit list print, Invoice printing, and Service call posting.

- **Look up service call history by svc address** – Use the Focus service address lookup file to allow expanded lookup options for service call history lookup. Filter calls to be looked up based on customer/service address name
- **CounterPoint customer auto-notes** – CounterPoint version only. Automatically pop-up any customer auto-display notes, as defined in CounterPoint, after customer selection in service call entry.
- **Limit ability to add customers on the fly** – CounterPoint version only. Honor the CounterPoint user file flag that allows, or disallows, the addition of new customers. If disallowed, do not allow addition of customers on the fly during Focus service call entry.
- **Credit hold enforcement** - Disallow service call entry continuation if the credit check determines that the customer is on credit hold.
- **Miscellaneous kits** - Extend kit processing in service call parts entry to include miscellaneous kits. Previously, only loose kits were processed in Focus.

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The following corrections to prior versions are issued in this release.

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- **Non-inventory part cost/price entry** – CounterPoint version only. Correct error that didn't allow cost overrides or price entry for miscellaneous parts used on a service call, if the CP user settings disallowed cost or price changes.
- **Entry of svc address notes during add OTF** – While adding a service address on the fly from call entry, the option didn't exist to enter an address note before saving. The F6 option to add the note before saving has been properly enabled.
- **Cash receipts posting** – CounterPoint version only - If posting to a non-AR CP customer, there is no customer AR account. Do not create an offset to the “net change to AR entry”. Formerly caused posting to a 0000-000 account. Also, include cash receipts for non-AR customers when printing the cash journal. These were not being printed on this report.
- **Entry of negative serialized items** – GP Classic only - Correct condition that didn't allow entry of a negative quantity used for serialized items in service calls. This problem only occurred in Focus running with GP Classic version 9.x.
- **Split billing distributions** - Correct potential problem with additional charge distributions created while using the split billing option. Only create the distributions when the associated charge is selected to be included in the split bill.
- **Service Call View** - If the service call maintenance function was entered from the dispatch board, viewing existing calls for a customer during call entry wouldn't display the site's calls properly. Attempting to view existing calls for the customer would display the call view selection criteria entry window, rather than the pre-selected list of calls.

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The following items were originally distributed as part of the corrections update to version 8.0, and are included in the version 8.1 base release.

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- ***Service Call Work Order printing*** - Printing service call work orders in batch mode was prompting for printer selection before each work order. This has been corrected so that all work orders print to the selected printer without being prompted more than once.
- ***Split Billing option activation*** - The option to select for split billing was not appearing in parts entry, labor entry, and the call equipment window, even though the option was registered properly.
- ***Service Contract number assignment*** - Pressing F2 to assign the next sequential service contract number from the Focus control file was not properly displaying the assigned number.
- ***Service Call Profit Analysis*** - Running the service call profit analysis report by Service Tech resulted in a loop, causing the workstation to hang.
- ***PM and Repair performed flag defaults*** – During entry of service call equipment, if a problem code is not selected, there is no default answer for the PM/Repair performed flags. To speed call entry, both of these flags will default to “No” if a value is not supplied.
- ***Correction: Service address lookup file problem*** – A problem existed when looking up service addresses by name. Under certain circumstances, an address could cause the lookup procedure to loop, causing the same name to be displayed multiple times.
- ***Service call credit memo notes*** - When processing a credit memo for a service call with call notes or labor notes, the notes were not printing on the credit memo form. Also, the service call restored into the current call file for the credit memo no longer had the notes attached.
- ***Help desk note error*** - Attempting to attach a help desk note to a service call as a work order note was causing a file error 39 on the file SVENTF.
- ***Labor subtotal display error*** - The service call labor subtotal was displaying incorrectly if the invoicing code in use specified rounding by "total labor", and the total labor hours were negative.
- ***Call deletion error*** – Attempting to delete a call with labor notes attached could display "ESC = Exit" during processing. The process would then pause, waiting for a key press before continuing. Under certain circumstances a file error 46 could occur.
- ***Split billing note posting*** - Correct problems with note posting when split billing calls. Post call notes to history, but don't delete from the live call. Also, Only process labor notes if the applicable labor record is selected for billing. Previously, all call and labor notes for the call would be moved to history upon billing.
- ***Notes file utilities*** - CounterPoint version only - Increase the size of the exported notes ID for the call/contract note file to match the increased size in v8.0. Exporting and then restoring the call/contract notes previously could result in loss of data.