

Quantrac 2011, Release 11.0 is complete!

We have almost completed programming, debugging, and testing HVAC Office R 11.0. You will enjoy the following changes, additions, and new features of our highly respected program. The following is a list of some of the new features and improvements:

New Features and Improvements

Email Address Function

1. Added a new Menu Bar item in Functions called, "Email Addresses". The concept is for the client to be able to command Quantrac to build a list of all email addresses in the Customer Contacts table so that they can cut and paste the list into an email that they have created or into their email client software's address book, or into excel.

Vehicle Maintenance

2. **Vehicle Maintenance logged items are now sorted with the oldest maintenance at the top.**

Sales Leads:

3. **Sales Lead Form now has an email address field:** In the Sales Lead form, you can now enter email addresses. Double-clicking on the email address and it creates and email to that address for you.
4. **Sale Lead Form Archiving:** When archiving an unsuccessful Sales Lead you will receive a message "Archiving this sales lead signifies that your sales efforts were not successful. The system will retain the unsuccessful Sales Lead for future reference or reactivation."
5. **Sales Lead Form Time Stamp:** Each time a Sales Lead is created, updated, edited, Quantrac will update the date and time of last activity field.
6. **Sales Leads from a Specific Customer:** When viewing archived Sales Leads for a specific customer, you will have the ability to divide those archived leads into two groups: "Successful" and "Not Successful".
7. **Function Quick Quote:** The "Quick Quote" function will be a way to view templates in read only without having to go to a Sales Lead or Setup runtime error.

Personnel Data:

8. **Personnel, Active Employees and Inactive Employees:** Moved the employee's "Nickname" to occupy the first column for ease of recognition.
9. **Employee Security:** Added User Security for viewing Employee Records, Attendance and Performance.
10. **Employee Compensation Form:** Added a "Notes" field (like Jobsite Notes) for entering compensation adjustment information.

Text Messaging:

11. **In Text Messaging, the Jobsite Zip Code is now included in items that can be included in the text message for the benefit of users that utilize certain GPS devices that need the zip codes.**

Invoices and Accounting:

12. **Service Invoice History:** Added "Completed" yes or no field in the list of invoices (Invoice History form) for Service invoices. This will reduce LAN activity for opening data just to see if the invoice has been completed or not.
13. **Customer Statement Fixed:** If you wish to view/print a Customer Statement that includes All Activity with the Date Range for a customer, the report states that there are no invoices to report UNLESS there is a currently incomplete invoice. If there's an incomplete invoice in the date range, it only shows those, but not all activity in the date range. If all invoices are completed, then you'll get the message, "No data to report".
14. **Customer Invoice History:** Added "Completed" yes or no field in the list of invoices (Invoice History form) for Customer invoices. This will reduce LAN activity for opening data just to see if the invoice has been completed
15. **Customer Statement:** Added an option to exclude printing statements with credit balances. Can you put another radio button on the Customer Statement form, "Exclude if Credit Balance". (default to print).
16. **Installation Invoice History:** Added "Completed" yes or no field in the list of invoices (Invoice History form) for Installation invoices. This will reduce LAN activity for opening data just to see if the invoice has been completed.
17. **Printed Invoices:** Added a new option to Setup|Other menu screen. It lets you set if you want to print Invoice Item numbers on invoices.
18. **Invoice Payments:** Widened the "Invoice Payments" form to allow for more text in the Reference column.
19. **Printed Invoices:** Eliminated the sales tax check box in the line items of the printed invoice. The box remains on the Invoice form but was not needed on the printed invoice.
20. **Installation Invoices:** To aid in composing Installation Invoices, you will be able to double-click in Installation Invoice form to cause the text to be in a zoom form; approximately the same width as a full printed page so word wrapping is approximately the same as will be in the printed invoice.
21. **Invoices:** The company name is now included in the subject of all **emailed** Service, Customer, and Installation invoices. ie: **"Quantrac Corp. Invoice Q16345.pdf"**
22. **Installation Invoice:** When emailing an Installation invoice, Quantrac now requires that an Invoice Number is assigned before emailing.
23. **Service Invoice:** When emailing a Service invoice, Quantrac now requires that an Invoice Number is assigned before emailing.
24. **Customer Invoice:** When emailing a Customer invoice, Quantrac now requires that an Invoice Number is assigned before emailing.
25. **Customer Accounting:** Quantrac now encrypts credit card numbers and now requires user security clearance to see them unencrypted.
26. **Invoice History:** When editing an invoice and saving, the amounts for that invoice in Invoice History will automatically be updated.
27. **Installation Invoice History Tax and Total:** The installation history invoice form now calculates the sub total & tax for all of the invoices giving a grand total. This eliminates manual calculation to determine the amount billed and the tax amount of all invoices for the selected Installation.
28. **Installation Invoice:** There are new Customer & Jobsite buttons on the Installation Invoice for efficient look-up.

29. **Incomplete Invoices Completion:** From Main Control Form, click Invoices. There is now a “Complete” button that will "complete" all highlighted invoices in each list. Added additional security warning that “Batch-completion of invoices circumvents the opportunity to examine them individually before marking ‘complete’. When the next AR Summary is performed, the completed invoices cannot be edited.”
30. **Invoice Payment from Credit Memo:** When settling (paying) an invoice from a credit memo, Quantrac now puts the info, "Applied Credit Memo # XXXXX." Into the widened field.

Maintenance Agreements:

31. **Quantrac-generated Seasonal Service Calls:** The system now moves the Contract Notes field data to the generated Service Call Notes field.
32. **Service Calls, Unscheduled (from Main Form):** New ability to divide Unscheduled Service Calls in this list into “All”, “Commercial”, or “Residential” with radio buttons.
33. **Quantrac-generated Seasonal Preventive Maintenance Service Calls:** Quantrac will now look at how many zones there are under contract, filling the ZONE field in the generated service call with the following: 1 system Jobsites = "Only". If the Jobsite has 2 systems or more, the field will be filled with "All Under Contract"
34. **Maintenance Contracts Delete Button:** Added a button to the Seasonal & Recurring Maintenance Contract forms to eliminate the maintenance agreement. Previously, manual deletion of all field data in the Maintenance Contract was required. Clicking the button will clear all data in all of the fields, thus eliminating the Contract.
35. **Create Specific Seasonal Maintenance Contract Call:** Added a new button on the Seasonal Maintenance Contract form that brings up the “Create Seasonal Contract Call” for that specific contract, as if done from the Utilities, Create Seasonal Call and Create Recurring Call functions in our menu bar.

Attachments:

36. **Attachments and Hyperlinks from the menu bar:** The Customer and jobsite address info is added into the Title Bar of the Attachments and Hyperlinks form if they exist.
37. **Functions\Attachments from the menu bar:** Added a Delete Button to the “View All Attachments” form to give the ability to remove attachments that have become obsolete.

Installations:

38. **Installation Notes:** We have made the "Installation Notes" form a little larger and wider to allow more data to be displayed without scrolling.
39. **Find Installations Form:** defaulted the “Find Jobsite” option to “Jobsite” as the first option.
40. **Installation Call:** Added vertical scroll bars in installation Call memo fields to allow scrolling up and down through the fields.

Utilities:

41. **Reattaching Data:** When Reattaching Data, after clicking the button we have added message box that says, “Reattaching data might take up to 10 minutes if there are other user workstations running Quantrac. To speed up the process, confirm that all workstations exit Quantrac and then return and Reattach Data.” “Do you wish to continue now?” Y/N
42. **Move Jobsite:** When moving a jobsite from one customer to another, the system will now open the Customer form and go ahead and do the move instead of asking for it to be opened manually.

Reports:

43. **Equipment receiving report:** (generated from a Purchase Order) Add the field (Promised To). Changed report to landscape to allow more data across a page.
44. **New Accounting Report:** Added a report of all customers that are tax exempt to DirectMail (Advanced form) and Customer List Report. The new Customers report criteria allows the user to view or print all customers that have at least one jobsite that is exempt from sales taxes. A mailing can be generated to these selected customers using the Direct Mail feature.

Service Calls:

45. **Service Calls form, Assigned Tab:** This is the tabbed form from the Service Calls button on the Main Control Form; added the assigned serviceman's name column (or first open assigned serviceman if more than one exists).
46. **Service and Installation Employee Times form:** Negative time calculations are no longer allowed.
47. **Service and Installation Employee Times form:** Added a Cancel button on the form so the user can cancel out without having to use the escape button to erase entries.

Miscellaneous:

48. **Adding Equipment to Jobsite Form:** Increased the combo box sizes for Equipment Type and Equipment Manufacturer on the Add Equipment form.
49. **Serialized Equipment Form:** Changed the Title Bar for the Serialized Equipment form to say "Serialized Equipment Costs"
50. **Customer Satisfaction:** Made the Customer Satisfaction questions customizable.
51. **Equipment Cost Form Hyperlink:** Added a Hyperlinks button so the user can link the manufacturer's web page to the specific model number.
52. **Hyperlinks Function for Nuts and Bolts:** Added a Hyperlinks function to "Nuts and Bolts" where users can store web links to manufacturers' websites and parts documentation for the selected part.

These are only a few of the improvements we have included in HVAC Office, Release 11.0. Our internal document lists well over 100 improvements, customer-requested changes, minor annoyance fixes, and new features. It is to your advantage to keep your software current and state-of-the-art to avoid problems with out-dated or obsolete software. We take seriously our commitment to keep Quantrac's software the most desired program in the HVAC industry.

Don't forget that when you purchase our new Release 11.0, you will also receive any future revisions to Release 11 that we publish at absolutely no cost at all. In addition, our Release 11 purchase price includes another full year of technical support, a \$360.00 value if purchased separately.

Quantrac Corporation continues to be a respected business partner of Bryant and Carrier Corporation.

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11.0 Upgrade Form

Phone: (972) 271-6898

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Company Name: _____ Phone Number: (____) - _____
 Company Street Address: _____ Suite No. _____
 Company City: _____ State: _____ Billing Zip: _____
 Fax Number: (____) - _____ Email Address: _____

Please select one of the following upgrade packages. *Please verify which package you are licensed for. Click on Help/About from within Quantrac to verify*

UPGRADE VERSION	CURRENT LICENSED PACKAGE (Put a X next to your package)				Enter Total
	Professional	Standard	Lite	Super Lite	
10.0 - 11.0	____ \$595.00	____ \$495.00	____ \$395.00	____ \$295.00	\$
	Professional	Standard	Lite	Super Lite	
9.0 - 11.0	____ \$695.00	____ \$595.00	____ \$495.00	____ \$395.00	\$
	Professional	Standard	Lite	Super Lite	
8.0 - 11.0	____ \$795.00	____ \$695.00	____ \$595.00	____ \$495.00	\$
	Professional	Standard	Lite	Super Lite	
7.0 - 11.0 and older	____ \$895.00	____ \$795.00	____ \$695.00	____ \$595.00	\$
	Professional	Standard	Lite	Super Lite	
UPRADE PRICE					\$
Texas Customers please add 8.25% Sales Tax					\$
Fed Ex Ground Shipping					\$12.00
TOTAL UPRAGE PRICE					\$

We gladly will accept your company check (please mail to the address listed at the top of this invoice), Visa, MasterCard, & American Express. If paying by credit Card, you can fill out the following information and for faster processing you can **fax this invoice** to (817) 562-5870 or Call our office at (972) 271-6898

Card Type: _____ (VISA, M/C, AMEX) Email: _____

Credit Card # _____ Exp: _____ / _____

Name as it appears on Credit Card: _____

Is this a Company credit card? _____ YES _____ NO **If *NO* Please fill out the following:**

Billing Street Address: _____

Billing City: _____ Billing State: _____ Billing Zip: _____

Billing Phone Number: (____) - _____ Fax Number: (____) - _____

Card Holder Signature: X _____