TMS

TEAM MANAGEMENT SYSTEMS, INC.

The Industry Leader in Service & Project Management Software

Inventory

Contracts

Project Management

Dispatch

Call Slips

Utilities

A/R

Information

Vendors

Purchase Orders

Inventory

Serialized Inventory

Utilities

Reports

Employees

Utilities

Receiving Slips

Utilities

Accounting

Setup

Accounts Receivables

Vendor Bills

Accounts Payables

Utilities
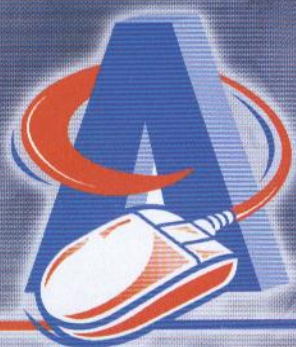
ACOWIN
FOR WINDOWS

Welcome to ACOWIN® for Windows®!

ACOWIN for Windows is an integrated software system designed specifically for the Service and Project Management industry and is the one tool that no company should be without. With ACOWIN for Windows, you can monitor the activities of your personnel, keep track of all costs associated with each job or service call and track movement of inventory in and out of warehouses and trucks. Invoicing the customer and keeping track of receivables is a snap with ACOWIN — an invoice is automatically created when a technician is dispatched and materials are entered on a work order. At the same time it is creating your invoices, ACOWIN is also generating detailed service history, all the way down to the model and serial numbers of equipment serviced.
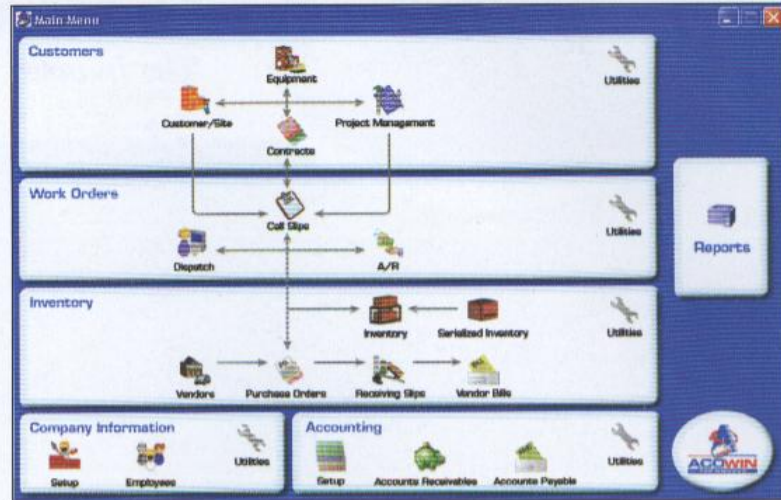
Customer Information

With ACOWIN, the customer information is entered one time and flows throughout the whole system, eliminating the need for double and triple entry.

- Unlimited sites per customer
- Detailed site history
- Customer/site diaries
- Automatic Word Merge
- Document attachments
- Seamless QuickBooks® interface
- Unlimited rate types
- Unlimited tax regions
- Marketing source tracking
- Alternate billing
- Ability to change ownership
- COD/Credit hold tracking

Service Agreements

With ACOWIN, managing your service agreements has just gotten easier. Each site can have an unlimited number of service agreements and the system will automatically generate invoices and inspection slips with detailed instructions at predefined intervals.

- Unlimited service agreements per site
- Ability to handle multi-year contracts
- Customized inspection schedule for each site
- Standard and customized billing intervals
- Automatically creates contract invoices
- Automatically creates weekly and monthly inspections
- Detailed contract profitability reports
- Ability to print inspection check lists
- Ability to track equipment covered on service agreement
- Document attachments and automatic Word Merge

Dispatching
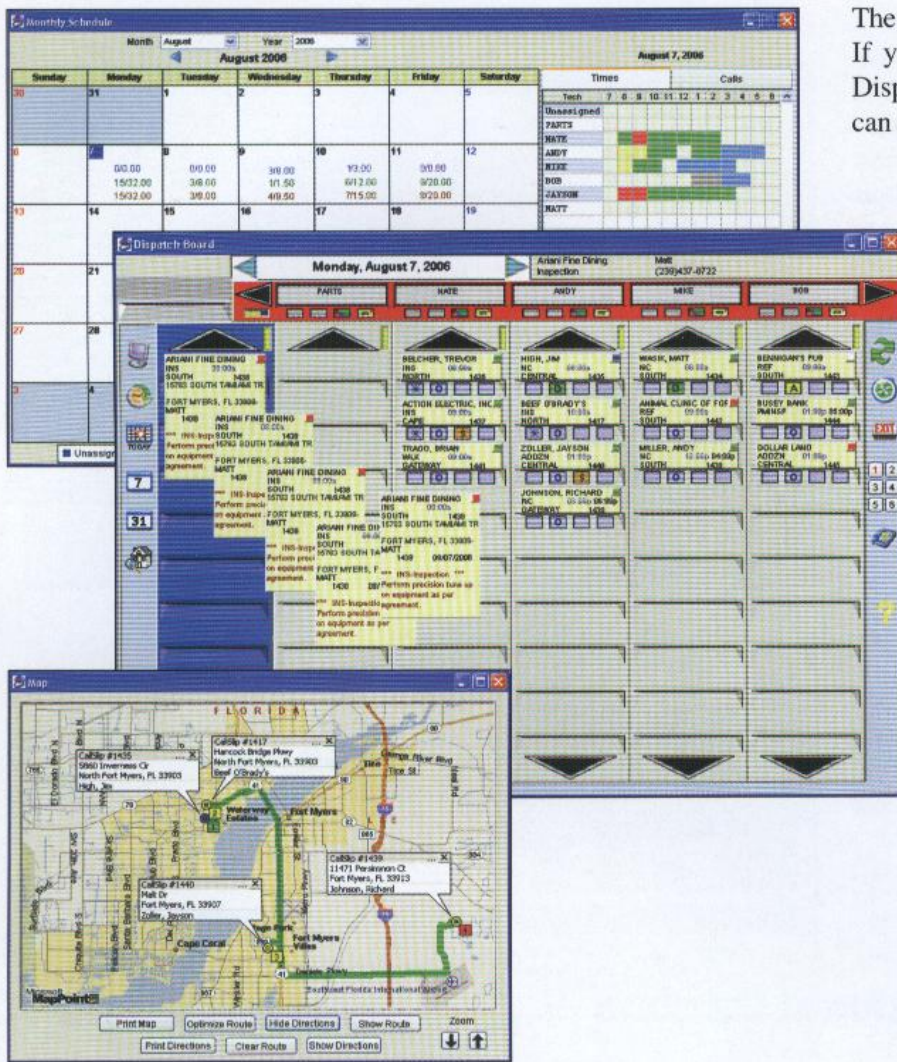
The Dispatch Board is the heart of the ACOWIN Service System. If you can play Solitaire, you will find using the ACOWIN Dispatch Board a snap! With the use of colors and symbols, you can tell exactly where a call stands in the dispatching process.

- Multiple boards per dispatcher
- Daily, weekly and monthly views
- Complete drag & drop
- Re-arrange techs on the fly
- Add new calls at the click of the mouse
- Records dispatch times
- Caller ID interface
- E-mail or alpha-page call slips
- Resizeable based on screen resolution
- Roll over open calls from prior day(s)
- Microsoft MapPoint interface
- Easily view call status based on colors
- Create POs directly from dispatch board
- Color-coded priorities
- Access anywhere in system from board
- Assign multiple techs to same call
- Schedule same call for multiple days
- Access customers and history from board
- Access equipment, history and warranties
- Tracks rescheduled calls
- Easily complete invoices from board
- Easy to use!

Invoicing

Invoicing service calls has never been easier than with ACOWIN's unique "Build an Invoice" concept. With "Build an Invoice", the information entered from dispatching and material usage is automatically carried through to the invoice, and priced using a rate schedule assigned to the work site.

- Automatically created from dispatch and material usage information
- Automatically relieves inventory
- Automatically creates service and equipment history
- Automatically calculates profitability
- Invoice text automatically created from labor, material and work resolution (or flat rate codes).
- Produces T&M, flat rate and as-agreed invoices
- Helps improve cash flow with accurate invoices
- Invoices can be updated and printed in the field
- Invoices can be viewed on screen, printed or e-mailed
- Seamlessly integrates with QuickBooks (if applicable)
- Can be used independently with ACOWIN's A/R
- Interfaces with other popular accounting systems
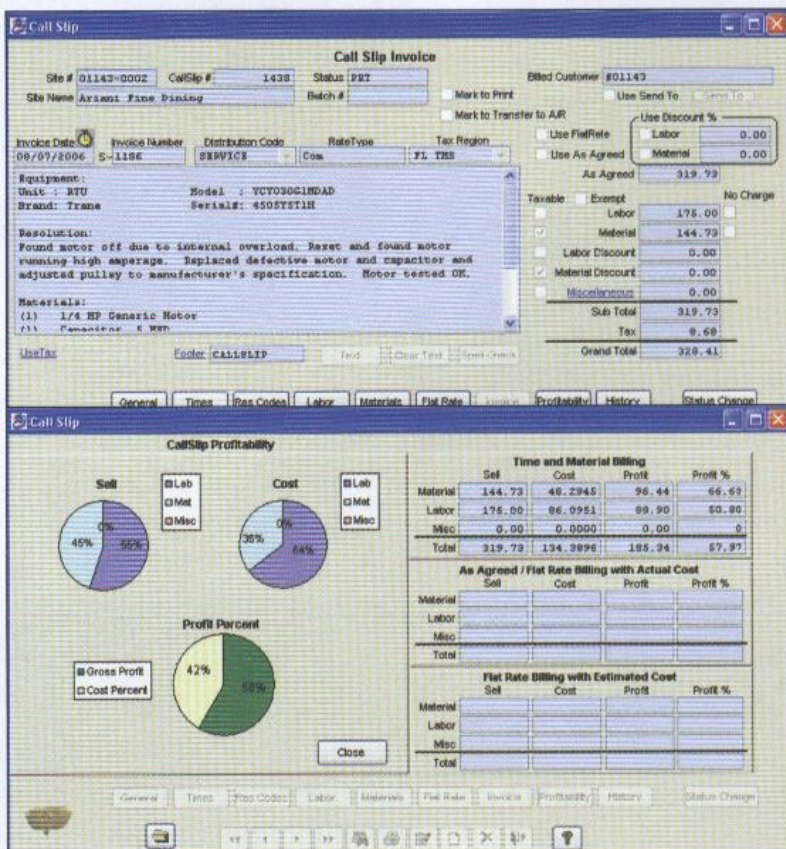
Equipment Information

ACOWIN makes tracking equipment and equipment warranties a breeze. Each site can have unlimited pieces of equipment and each piece of equipment can be broken down into components.

- Tracks both labor and parts warranty
- Tracks brand, model and serial number
- Tracks model year and installation date
- Tracks equipment location and service area
- Ability to attach pictures
- Ability to attach documents
- Tracks components of equipment
- Detailed history per piece of equipment
- Ability to enter notes about equipment

Inventory

When it comes to tracking inventory — whether it is the main warehouse, a truck or a warehouse across town — ACOWIN has it covered. Inventory is automatically relieved from various warehouses or trucks during the invoicing process or transferred between warehouses with a click of the mouse, making the job of inventory control a snap.

- Multiple warehouses and truck inventory
- Serialized inventory and floor planning
- Ability to view actual vs. committed
- Tracks multiple vendors part numbers
- Ability to set minimum and optimum quantities
- Automatic truck restock and ability to copy locations
- Ability to make mass changes to sell prices or list costs
- Easily swap inventory from one truck to another
- Bar coding

Purchase Orders & Accounts Payable Interface

Controlling your costs is the key to being a profitable company. With the ACOWIN purchase order system, all material and equipment purchased is directly posted to the correct work order, job, warehouse or truck. The Accounts Payable interface ensures the costs are posted to the correct G/L accounts and department.

- One PO for multiple locations (jobs or warehouses/trucks)
- Can use one PO for multiple vendors
- Can purchase stock and non-stock items
- Flows directly to work order and job
- Vendor bills can be created from PO or receiving slip
- Ability to e-mail POs
- Seamless QuickBooks integration

Project Management

Job Information Overview

Job Phases and Phase Breakdown


Job Profitability Overview

The ACOWIN Project Management system makes it easy to track costs, income and profitability for projects of any size. Extensive information for every job is maintained, including detailed lists of materials and labor required for each task of the project. Profitability is computed for both the base contract and any number of Extras or Change Orders. Multiple billing methods are available and Purchase Orders for necessary items are generated automatically. From large multi-stage projects that require months of labor and multiple billings, to small one and two day retrofit jobs, ACOWIN Project Management is up to the task!

- Manage projects of any size
- Handles T&M, contract & "not to exceed" billing
- Detailed estimates for each phase of the project
- Standard lists of phases can be defined for each job type
- Automatically generates purchase orders from job estimate
- Automatically produces a picking slip for in-house inventory
- Estimated vs. actual cost comparison for each phase
- Profitability computed based on up-to-date job costs and billing
- Job billing can be based on work completed
- Progressive billing independent of costs is also available
- Detailed change order tracking
- Review profitability of base contract, change orders or phases
- Detailed management reports
- Easily access associated work orders, purchase orders and invoices directly from the job.
- Automatic text for job invoices
- Calculates commissions for salespeople
- Warranty tracking upon completion of project
- Ability to compute dual overhead for use in determining net profitability
- Attach important documents to your jobs, including permits, plans, correspondence, spreadsheets, digital photographs and more.
- Automatic merge with Microsoft Word® to produce impressive proposals, release of lien documents, business letters and more
- Diary notes with color coded reminders for scheduling and tracking important events
- Seamless integration with QuickBooks Pro, Premier and Enterprise editions
- Easy to use!

ACOWIN
FOR WINDOWS®

Management Reports

ACOWIN includes a generous assortment of management reports, tailored to analyze invoices, service calls, customer data, equipment information, service contracts and more. Over a hundred different reports are available, each neatly summarized on the master report screen, to help users quickly locate the correct report for their needs. Each report is prepared using a unique intelligent reporting assistant, which summarizes the results of a user's requests and report criteria in plain English. This will help users prepare complex reports with multiple sort and selection conditions easily. Reports can be previewed on screen, printed to a printer, or saved as Adobe Acrobat PDF files for easy transmission via e-mail.
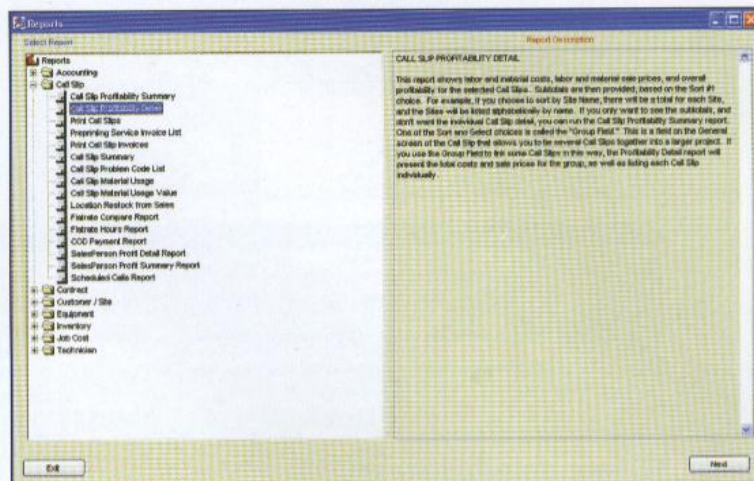
Works Seamlessly with QuickBooks®

One of ACOWIN's many powerful features is seamless integration with QuickBooks Pro, Premiere, Enterprise, and Accountant editions. This makes it easy to continue using your preferred accounting system, combined with the complete service and project management capabilities of ACOWIN.

designed for
QuickBooks®
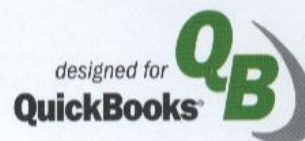
See system requirements for version information

Additional Options

Mobile Computing

ACOWIN mobile computing allows technicians to view the customer's site information, including equipment, problem reported and history of prior work via laptop or PDA. In addition, the technicians can complete their own service calls, including work times, equipment specifications, materials used, and a description of the work performed. Invoices can then be printed in the field, using time & material, quoted prices, or flat rate.

Caller ID

The ACOWIN Caller ID option gives your system the ability to identify incoming calls by matching the caller ID information to your customer database. With the click of a button, you can open a new service ticket and be ready to go before ever picking up the phone.

E-Mail/Paging

With the ACOWIN e-mail/paging option, dispatchers can send service call information directly to a technician's alphanumeric pager or e-mail capable phone at the click of the mouse. You can even determine the information to send and in what order that you want to send it. In addition to sending service call information, free formed messages can be sent to a single technician or broadcast to a group of technicians.

Mapping Interface

The mapping interface allows you to instantly generate accurate maps of service call locations using Microsoft MapPoint®. In addition to viewing a single call's location or a complete route, you can view which tech is closest to a specific call.