
FOCUS release notes - version 8.5

- ***Contract invoice reprinting*** – The reprint of individual contract history invoices is now allowed. Previously printed contract invoices can be selected and reprinted in their original form. A new menu selection has been added under reports, called “Reprint contract invoices”
- ***Focus Workgroups option*** – CounterPoint version – Add the ability to set up workgroups for Focus. Enabling this option will allow users to process service work, segregated by separate divisions, stores, geographical areas, etc. This is an additionally purchased option to Focus. A detailed description of the workgroups option is attached as a specification at the end of this document.
- ***Improved contract history lookup*** – Allow selection/lookup of contract history lines by contract number, customer number, and invoice number. The new selection options are available when viewing and printing contract history, and also when reprinting service contract invoices.
- ***Credit memo number choice*** – Allow the entered invoice number to be less than the service control file “next invoice number” when printing credit memos. Formerly, the displayed next invoice number to use could not be overridden.
- ***Service call post error correction*** – Change to work order posting process to correct file error 42 that could be reported under certain conditions.
- ***Credit memo selection limitation*** – Do not allow a history service call to be selected for crediting if the call number is already on file in the live service calls. This corrects an issue with the merging of the credited service call information incorrectly merging with the existing, unbilled call.
- ***Service call default tax code*** – CounterPoint version – If no tax code can be determined from the service call service address or customer, take the tax code from the CounterPoint store.
- ***Meter reading field size*** – Increase the allowable digits entered and processed for machine meter readings from 7 to 9. This allows entry, posting, and overage billing of meters that have readings into the hundreds of millions.
- ***Correction, Contract discount entry*** – PBS version – When entering the contract discount in the PBS platform, remnants of the entry window were being left on the screen. This has been corrected in this release.
- ***Contract invoice printing by category*** – Allow the printing of contract invoices by contract category. For sites that bill on different forms based on this field. This allows the convenience of selecting all invoices for printing at the same time. The print function can then filter the contracts by category and print on the correct form layout.

- ***Correction, deferred contract posting*** – Correct condition that could prematurely end the sales posting routine when posting contract invoices in “deferred” mode.
- ***Logging of activity*** – A control file option has been added to Focus, allowing for logging of file access activity for certain critical functions within the software. Setting the logging feature on will capture user, date/time, and function activity for service call maintenance, system history updating, and point of sale transfer functions. This has been added for system troubleshooting purposes.
- ***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.
 - If the work order being transferred was created from a POS ticket, transfer back to the same ticket, if it still exists. Only append the lines added to the work order (labor, additional charges, and added parts).
 - Establish the transferred order’s profit center based on the default profit center of the store record, derived from the svc control/workgroup file posting drawer.
 - Establish the transferred order’s default inventory location based on the default profit center of the store record.
 - Added an option to log all file access activity during the creation of the POS ticket
- ***Service call parts entry*** – Multiple enhancements have been added to the process of entering service parts used onto a service call.
 - Allow negative quantities to be entered onto a part used in the PBS version of Focus.
 - Add processing to establish the part’s warehouse, derived from the svc control/workgroup file posting drawer, whenever multi-location is set to “No” in the IC control file.
 - CounterPoint only – If an inventory location has already been established, pass it to the CP item lookup. This allows the display of the qty available for only the location to which the item is assigned.
- ***Passport screen cleanup*** – Various changes to the display and entry of data have been made to allow for differences in the Passport screen handling routines.
- ***Contract paid status*** – Additional logic to help determine if a contract history item has been paid in the customer’s account. This information is displayed when choosing a contract invoice from history, and when viewing contract history.

Focus enhancement specifications: Workgroups for Service Work Orders

These enhancements will allow for extended functionality in Focus as described below.

- **General** – If CounterPoint workgroups are in use for the currently logged in company, the workgroup used for the user at CP login time will be used to limit access to service items. If the WAN for Workgroups option is not registered in CounterPoint, the logged in user's default store will be used for the workgroup ID. Service items that will be included in special workgroups processing are service calls, service technicians, transfer to POS, and service call invoicing functions.
- **Workgroup Control Information** – Create a limited subset of Focus control information. This setup information will be assigned to a particular workgroup, and will override the company-wide fields in the main control file info setup. Users should set up a Focus workgroup to match each of the CP workgroups or stores needed. There are two screens of information that can be entered. For each option, a workgroup value can be entered, or F2 can be pressed to use the option as it is set up in Focus Control Information.
- **Service Call Maintenance** – Add a field to service call maintenance for entry of a workgroup. This will allow service call processing functions to be filtered by the user's logged in workgroup. Default the initial value of workgroup in the svc call extended information screen from the user login information. Allow change to the workgroup. When looking up calls, only the ones for the user's workgroup are displayed. If a user does not have a default workgroup or store set up (manager), they will see all calls.
- **Transfer to POS** – When a service call is transferred to POS for billing, the drawer (and therefore the register and store) from the workgroup setup is used when creating the resulting ticket. Using the default svc call profit center method of "Store" in the workgroup setup can then properly route service call distributions to the correct location.
- **Service Call Invoicing** – When invoices are printed and posted from Focus using the workgroups option, a workgroup is defaulted for the user and may be overridden if desired. Only the selected group will be processed during selection, edit list, printing of invoices, and posting.