

Wintac 2012 is Shipping Now.

To order, call 1.800.724.7899.

It is truly an understatement to say that no other software in the service industry comes close to the power, flexibility, and ease-of-use of Wintac 2012. Wintac has long been the software against which all others are compared, and now Wintac 2012 raises the bar even higher!

~ Our Pledge to all Wintac Owners ~

Regardless of whether you are upgrading from last year's version or a release from several years ago, when you purchase Wintac 2012, you get the complete program including all of the features added and enhancements made since your version! You do not have to purchase or install any "missing" versions between your current version of Wintac and Wintac 2012.

And remember: All upgrades include another full year of unlimited technical support services at no additional cost!

Check the list below to see what has been added and enhanced just in the past year...

Job Control Center and Scheduling/Dispatch Boards

- The Job Control Center now includes a column for the **I/P (Invoice/Proposal) Date** and the **Due Date** of jobs. Now when you search the JCC for a range of dates, Wintac will automatically look at the Job Date on work orders, and the I/P date on invoices and proposals.
- The Job Control Center's feature for selecting the type of WIPs to include on the board has also been incorporated into the **DailyView**, **WeeklyView**, and **MonthlyView** layouts of the dispatch board. A Show dropdown menu on each board allows you to select and alternate between any of the following eight display options: Work Orders, Invoices, Work Orders and Invoices, Open Invoices, Proposals, Purchase Orders, New WIPs, and All WIPs. *One of the year's most requested enhancements!*
- You can now customize the **TimeSlots** layout of the DailyView board by specifying a start time and an end time for the display (e.g. you can limit the display to your normal business hours).
- You can now customize the **TimeSlots** layout of the DailyView board by specifying whether jobs are displayed in 15 minute, 30 minute, or 1 hour time intervals.
- A new resize option for the **DailyView** board instantly reduces the footprint of the board by 30%, allowing you to view more tech columns at a time without scrolling.
- The versatile **Job Schedule** report builder now has even more options: You can now select an alternate report format for a day's jobs that is based on the start times of the primary technicians. The column layouts include: Job Reference Number, Start Time, Job Location, Work Description, Customer/Job Site Misc. fields, and the Description and Manufacturer of the equipment to be serviced. There is also a blank Time Completed column for the techs to fill in their completion time.
- You can now **email** the Job Schedule report to techs in the field from anywhere in Wintac that it can currently be printed. So, whether you are at a customer record,

the Job Control Center, or any dispatch board view, you can now instantly send a complete schedule of work covering any time period to your techs' PDA, smartphone, laptop, or tablet computer in the field. *One of the year's most requested enhancements!*

- A new **work order scheduling** option has been added to Business Options. When the option is turned on and a user attempts to schedule work at a specified job site, Wintac will check for any jobs (work orders or invoices) entered for that same job site within the past X days (where X is a user-specified number). If a job is found, a warning will pop up alerting the user of a potential duplicate booking or other conflict. Note that, if a prior job is found and password security is turned on, Wintac will require that the user enter an administrator password to process the work order. *This is a great safety tool for avoiding data entry or scheduling errors.*
- Wintac can now automatically generate work orders for your customers' equipment that is due for scheduled service. A new **Generate Work Orders** button has been added to the Equipment Service & Expiration reports window that, when clicked, will create and schedule a new work order based on the equipments' Next Service On Date. You can even have Wintac combine multiple pieces of equipment that are due for service on the same date at the same location into a single work order. (not available in Wintac Green)
- Now you can set Wintac to automatically **reschedule equipment** service and maintenance based on either every X number of months or every X number of days. If you select to reschedule by month, Wintac will reschedule the service on the same day of the month for each subsequent month. (not available in Wintac Green)
- A new **Mobile Computing** option for Notebook Messaging can be selected that prohibits a work order in the field from updating its associated invoice in the office. This is handy if, say, the office inadvertently converted a work order to an invoice before the tech in the field sent the updated work order back to the office. This setting prevents you from losing track of an outstanding A/R transaction as a result of user error.
- Wintac's powerful **report builder** just got even better: You can now "**quick print**" any report based on a user-defined report-builder criterion for that report. So, for instance, let's say you typically print a Job Schedule Report sorted and grouped by "Technician" for "Install" jobs within your "Commercial" division. You simply click the Save button to save all the filtering criteria and, whenever you wish to generate the report based on the same criteria, just click the Load button at that report. It couldn't be easier! *This is a tremendous timesaving tool for quickly generating commonly used reports!*

Proposals

- Items & Amounts now has a real-time **multi-line listing** option. This new feature displays a scrollable list of items as you enter them. Review entered items without paging back and forth. *One of the year's most requested enhancements!*
- You can now select any associated pictures, Word/PDF files, and Excel spreadsheets to attach to **emailed** proposals. Simply check off the documents you wish to include with the email and Wintac does the rest. *One of the year's most requested enhancements!*
- You can now set an option that requires users to specify the **inventory location** associated for items whenever adding line items in Items & Amounts. When a line item is first added, the location field will default to blank and not allow the user to exit that line item until an inventory location is selected. (not available in Wintac Green)
- You can now click a hyperlink from directly inside the WIP Writer screen to view the **work history** for the job site referenced on the current proposal.

- Wintac will now automatically suppress the **Markup/Discount** price for line items from displaying on printed proposals when the customer has a zero percent MU/Disc value set in their Billing Options window.
- You can now select to have **proposals** show up on the DailyView, MonthlyView, and/or WeeklyView boards, as well as the Job Control Center.
- A new **Contract Invoice** form has been created for printing on plain paper that automatically reflects a contract amount from an associated proposal. The printed form itemizes the line items entered into the invoice and also displays the following totals: Contract Amount (from the proposal), Deposits/Credits (i.e. receipts applied to the invoice), Contract Balance (i.e. Contract Amount minus Deposits/Credits), and Payment Due (i.e. invoice total minus Deposits/Credits). This new form provides a simple, fully automated method of progress billing for jobs that do not require the power and flexibility of Wintac's comprehensive progress billing feature.
- You can now have Wintac automatically update the **Install/Service** Date associated with each line item in a proposal to match a specified date field whenever you process the proposal into either a work order or an invoice. You can specify any one of the following date fields: Call Date, Promise Date, Job Date, I/P Date, Due Date.
- A new **Tech** field with a dropdown list of technicians has been added to the Items & Amounts window that gives you the ability to track items usage by technician on a line-by-line basis. By default, whenever you add a new line item, Wintac will automatically fill in the Tech field to match the WIP's primary Tech. You can then optionally change the default to any other technician. In addition, the Items Usage & Profit Analysis Report has been enhanced with a new Limit to Tech filtering option. *One of the year's most requested enhancements!*
- The following additional fields from the Items & Amounts window are now available for use in your custom-designed **Word proposals**: Equipment Type (not available in Wintac Green), Item Type, Item Location, and Item Technician.
- The **Equipment Lookup** window (accessible from Items & Amounts when you click the *Select Equipment* link) now includes a checkbox next to each piece of equipment that enables you to select multiple pieces of equipment at a time. There is also a Select All option for quickly selecting all the equipment installed at that job site. Note that, when you select multiple pieces of equipment, Wintac will automatically create a line item in the proposal for each one. (not available in Wintac Green)
- The Job Control Center now includes a column for the **I/P (Invoice/Proposal) Date** and the **Due Date** of jobs. Now when you search the JCC for a range of dates, Wintac will automatically look at the Job Date on work orders, and the I/P date on invoices and proposals.
- The **Calculate Hours** pop-up window in Items & Amounts now includes a dropdown list of all technicians assigned to the job. Simply select a technician and Wintac automatically fills in their assigned start and end times for the job, calculates the number of hours, and inserts the total into the Hrs/Qty field for that technician's line item. Tracking labor for your service people couldn't be easier!
- A **new proposal processing feature** gives you the ability to mark specific line items as DECLINED. This causes Wintac to not factor in the price of these items when calculating the proposal total. This is handy to show your customer the available options that they declined to accept.
- An alternate 11" form that displays the **two user-definable fields** associated with each line item is now available for printing proposals.
- The Customer screen's pop-up Work History window can now optionally include **proposals**, along with work orders and invoices.

- The **Items Usage & Profit Analysis** Report has been enhanced with an option to sort and group the report by the Department field from Items & Amounts. Using this option, Wintac will automatically compile and group items by department and, within department, subgroup items by the Item Code.
- The *Address 1* and *Address 2* fields for the **Job Site** now have user-definable labels. So, for example, you might change the *Address 1* label to *Contact*, and the *Address 2* label to *Street*.
- In addition to its existing sort options, the **Batch Printing/Emailing** feature for proposals has been enhanced with a new "Sort by Job Number" option and a new "Limit to Division" option.
- You can now export your **picture attachments** in Wintac directly to Microsoft Word documents. This gives you the ability to select the pictures to be exported from Wintac's Picture Browse window and then have Wintac automatically create and format multiple pictures per page on a new Word document.

Work Orders

- Now you can set Wintac to automatically **reschedule equipment** service and maintenance based on either every X number of months or every X number of days. If you select to reschedule by month, Wintac will reschedule the service on the same day of the month for on each subsequent month.
- You can now select any associated pictures, Word/PDF files, and Excel spreadsheets to attach to **emailed** work orders. Simply check off the documents you wish to include with the email and Wintac does the rest. *One of the year's most requested enhancements!*
- For companies that track their field service people in crews, you can now add to and modify members of the crew directly from the pop-up **Crew** window in the WIP Writer.
- The **Calculate Hours** pop-up window in Items & Amounts now includes a dropdown list of all technicians assigned to the job. Simply select a technician and Wintac automatically fills in their assigned start and end times for the job, calculates the number of hours, and inserts the total into the Hrs/Qty field for that technician's line item. Tracking labor for your service people couldn't be easier!
- A new option allows you to include the **complete work history** for the job site on a work order. You can also specify a starting date for how far back Wintac should look for the history information.
- Items & Amounts now has a real-time **multi-line listing** option. This new feature displays a scrollable list of items as you enter them. Instantly review entered items without paging back and forth. *One of the year's most requested enhancements!*
- The **Equipment Lookup** window (accessible from Items & Amounts when you click the *Select Equipment* link) now includes a checkbox next to each piece of equipment that enables you to select multiple pieces of equipment at a time. There is also a Select All option for quickly selecting all the equipment installed at that job site. Note that, when you select multiple pieces of equipment, Wintac will automatically create a line item in the work order for each one. (not available in Wintac Green)
- You can now set an option that requires users to specify the **inventory location** associated for items whenever adding line items in Items & Amounts. When a line item is first added, the location field will default to blank and not allow the user to exit that line item until an inventory location is selected. (not available in Wintac Green)
- You can now **email** the Job Schedule report to techs in the field from anywhere in Wintac that it can currently be printed. So, whether you are at a customer record,

the Job Control Center, or any dispatch board view, you can now instantly send a complete schedule of work covering any time period to your techs' PDA, smartphone, laptop, or tablet computer in the field. *One of the year's most requested enhancements!*

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- A new **Tech** field with a dropdown list of technicians has been added to the Items & Amounts window that gives you the ability to track items usage by technician on a line-by-line basis. By default, whenever you add a new line item, Wintac will automatically fill in the Tech field to match the WIP's primary Tech. You can then optionally change the default to any other technician. In addition, the Items Usage & Profit Analysis Report has been enhanced with a new Limit to Tech filtering option. *One of the year's most requested enhancements!*
- Wintac can now automatically generate work orders for your customers' equipment that is due for scheduled service. A new **Generate Work Orders** button has been added to the Equipment Service & Expiration reports window that, when clicked, will create and schedule a new work order based on the equipments' Next Service On Date. You can even have Wintac combine multiple pieces of equipment that are due for service on the same date at the same location into a single work order. (not available in Wintac Green)
- The **Create an Invoice Based on Multiple Work Orders** feature has been enhanced to automatically record the new invoice number in the comments field of each work order that it reflects. This makes it easier to trace back to the original work orders that comprise an invoice.
- The following additional fields from the Items & Amounts window are now available for use in your custom-designed **Word work orders**: Equipment Type(not available in Wintac Green), Item Type, Item Location, and Item Technician.
- You can now have Wintac automatically update the Install/Service Date associated with each line item in a work order to match a specified date field whenever you process the work order into an invoice. You can specify any one of the following date fields: Call Date, Promise Date, Job Date, I/P Date, Due Date.
- A **new work order processing feature** gives you the ability to mark specific line items as DECLINED. This causes Wintac to not factor in the price of these items when calculating the work order total. This is handy to show your customer the available options that they declined to accept.
- An alternate 11" form that displays the **two user-definable fields** associated with each line item is now available for printing work orders.
- In addition to its existing sort options, the **Batch Printing/Emailing** feature for work orders has been enhanced with a new "Sort by Job Number" option and a new "Limit to Division" option.
- You can now click a hyperlink from directly inside the WIP Writer screen to view the **work history** for the job site specified on the current work order.
- The *Address 1* and *Address 2* fields for the **Job Site** now have user-definable labels. So, for example, you might change the *Address 1* label to *Contact*, and the *Address 2* label to *Street*.

- A new **Mobile Computing** option for Notebook Messaging can be selected that prohibits a work order in the field from updating its associated invoice in the office. This is handy if, say, the office inadvertently converted a work order to an invoice before the tech in the field sent the updated work order back to the office. This setting prevents you from losing track of an outstanding A/R transaction as a result of user error.
- The **Items Usage & Profit Analysis** Report has been enhanced with an option to sort and group the report by the Department field from Items & Amounts. Using this option, Wintac will automatically compile and group items by department and, within department, subgroup items by the Item Code.
- You can now export your **picture attachments** in Wintac directly to Microsoft Word documents. This gives you the ability to select the pictures to be exported from Wintac's Picture Browse window and then have Wintac automatically create and format multiple pictures per page on a new Word document.
- A new alternate **Visual Job Costing** window in the Employee/Payroll manager gives you the ability to post a technician's hours to multiple jobs at once rather than posting hours for only one job at a time. From this new Visual Job Costing window, you will be able to enter the number of hours, enter the post date, and select the type of hours from a drop down list for each of the technician's jobs. *One of the year's most requested enhancements!*

Invoices and Accounts Receivable

- A new **Contract Invoice** form has been created for printing on plain paper that automatically reflects a contract amount from an associated proposal. The printed form itemizes the line items entered into the invoice and also displays the following totals: Contract Amount (from the proposal), Deposits/Credits (i.e. receipts applied to the invoice), Contract Balance (i.e. Contract Amount minus Deposits/Credits), and Payment Due (i.e. invoice total minus Deposits/Credits). This new form provides a simple, fully automated method of progress billing for jobs that do not require the power and flexibility of Wintac's comprehensive progress billing feature.
- You can now select any associated pictures, Word/PDF files, and Excel spreadsheets to attach to **emailed** invoices. Simply check off the documents you wish to include with the email and Wintac does the rest. *One of the year's most requested enhancements!*
- Items & Amounts now has a real-time multi-line listing option. This new feature displays a scrollable list of items as you enter them. Review entered items without paging back and forth. *One of the year's most requested enhancements!*
- The **Equipment Lookup** window (accessible from Items & Amounts when you click the *Select Equipment* link) now includes a checkbox next to each piece of equipment that enables you to select multiple pieces of equipment at a time. There is also a Select All option for quickly selecting all the equipment installed at that job site. Note that, when you select multiple pieces of equipment, Wintac will automatically create a line item in the invoice for each one. (not available in Wintac Green)
- The **Create an Invoice Based on Multiple Work Orders** feature has been enhanced to automatically record the new invoice number in the comments field of each work order that it reflects. This makes it easier to trace back to the original work orders that comprise an invoice.
- A **new invoice processing feature** gives you the ability to mark specific line items as DECLINED. This causes Wintac to not factor in the price of these items when calculating the invoice total. This is handy to show your customer the available options that they declined to accept.

- An alternate 11" form that displays the **two user-definable fields** associated with each line item is now available for printing invoices.
- You can now set an option that requires users to specify the **inventory location** associated for items whenever adding line items in Items & Amounts. When a line item is first added, the location field will default to blank and not allow the user to exit that line item until an inventory location is selected. (not available in Wintac Green)
- You can now select to have **invoices** show up on the DailyView, MonthlyView, and/or WeeklyView boards, as well as the Job Control Center.
- You can now click a hyperlink from directly inside the WIP Writer screen to view the **work history** for the job site specified on the current invoice.
- Wintac will now automatically suppress the **Markup/Discount** price for line items from displaying on printed invoices when the customer has a zero percent MU/Disc value set in their Billing Options window.
- A new **Tech** field with a dropdown list of technicians has been added to the Items & Amounts window that gives you the ability to track items usage by technician on a line-by-line basis. By default, whenever you add a new line item, Wintac will automatically fill in the Tech field to match the WIP's primary Tech. You can then optionally change the default to any other technician. In addition, the Items Usage & Profit Analysis Report has been enhanced with a new Limit to Tech filtering option. One of the year's most requested enhancements!
- The **Calculate Hours** pop-up window in Items & Amounts now includes a dropdown list of all technicians assigned to the job. Simply select a technician and Wintac automatically fills in their assigned start and end times for the job, calculates the number of hours, and inserts the total into the Hrs/Qty field for that technician's line item. Tracking labor for your service people couldn't be easier!
- You can now have Wintac automatically update the **Install/Service** Date associated with each line item in a work order to match a specified date field whenever you process the work order into an invoice. You can specify any one of the following date fields: Call Date, Promise Date, Job Date, I/P Date, Due Date.
- The Job Control Center now includes a column for the **I/P (Invoice/Proposal) Date** and the **Due Date** of jobs. Now when you search the JCC for a range of dates, Wintac will automatically look at the Job Date on work orders, and the I/P date on invoices and proposals.
- Wintac can now export customer invoice data to the **OB10 e-Invoicing system** for users of that service. (Requires subscription through OB10)
- In addition to its existing sort options, the **Batch Printing/Emailing** feature for invoices has been enhanced with a new "Sort by Job Number" option and a new "Limit to Division" option.
- The feature for **emailing statements** to customers with open/overdue balances has been enhanced with an option to have Wintac automatically print a statement for those customers who do not have an email address on file.
- An alternate layout of the **11" Free Form Invoice w/Tear-Off** form has been added that aligns the return address and billing address sections specifically for inserting into a standard #10 dual-window envelope.
- The *Address 1* and *Address 2* fields for the **Job Site** now have user-definable labels. So, for example, you might change the *Address 1* label to *Contact*, and the *Address 2* label to *Street*.
- The following additional fields from the Items & Amounts window are now available for use in your custom-designed **Word invoices**: Equipment Type(not available in Wintac Green), Item Type, Item Location, and Item Technician.

- When viewing/editing a bank deposit transaction in an account register, the **Show Receipts** window now also includes a column displaying the Invoice Date of the invoice to which the receipt has been applied.
- The filtering criteria for the **Receipt History** report has been enhanced with options to limit the report based on the contents of the associated invoice's SP (salesperson) and Tech fields.
- The **Receipt History** report has been enhanced with an option to include the associated job's **profit margin** next to each receipt.
- A new **Mobile Computing** option for Notebook Messaging can be selected that prohibits a work order in the field from updating its associated invoice in the office. This is handy if, say, the office inadvertently converted a work order to an invoice before the tech in the field sent the updated work order back to the office. This setting prevents you from losing track of an outstanding A/R transaction as a result of user error.
- A new **Modify Balance Forward** option has been added to the *Edit All Customers* window that gives you the ability to globally turn on or off, for a range of customers, the feature to include previous outstanding balance on invoices.
- Any customer sales reports that currently enable users to limit the report based on the contents of the invoice's SP (salesperson) or Tech fields now also allow limiting based on the **Project Manager** field.
- The **Items Usage & Profit Analysis** Report has been enhanced with an option to sort and group the report by the Department field from Items & Amounts. Using this option, Wintac will automatically compile and group items by department and, within department, subgroup items by the Item Code.
- All **Sales Journals** reports have been enhanced with an option to include all individual transactions *or* show only a summary of the transaction totals.
- You can now export your **picture attachments** in Wintac directly to Microsoft Word documents. This gives you the ability to select the pictures to be exported from Wintac's Picture Browse window and then have Wintac automatically create and format multiple pictures per page on a new Word document.
- A new alternate **Visual Job Costing** window in the Employee/Payroll manager gives you the ability to post a technician's hours to multiple jobs at once rather than posting hours for only one job at a time. From this new Visual Job Costing window, you will be able to enter the number of hours, enter the post date, and select the type of hours from a drop down list for each of the technician's jobs. *One of the year's most requested enhancements!*

Point-of-Sale Processing

- **POS** will now automatically prompt for additional payments when the first payment is less than the total amount. This enables you to apply additional payments to an invoice, on the fly, without having to add the receipts through the A/R Viewer. *This is a huge point-of-sale time-saver!*
- You can now set Wintac to automatically close the WIP Writer and return the user to the main customer screen whenever a **POS transaction** is completed and paid in full.

Equipment Service Tracking (Not available in Wintac Green)

- Wintac can now automatically generate work orders for your customers' equipment that is due for scheduled service. A new **Generate Work Orders** button has been added to the Equipment Service & Expiration reports window that, when clicked,

will create and schedule a new work order based on the equipments' Next Service On Date. You can even have Wintac combine multiple pieces of equipment that are due for service on the same date at the same location into a single work order. *One of the year's most requested enhancements!*

- Now you can set Wintac to automatically **reschedule equipment** service and maintenance based on either every X number of months or every X number of days. If you select to reschedule by month, Wintac will reschedule the service on the same day of the month for each subsequent month.
- The **Equipment Lookup** window (accessible from Items & Amounts when you click the *Select Equipment* link) now includes a checkbox next to each piece of equipment that enables you to select multiple pieces of equipment at a time. There is also a Select All option for quickly selecting all the equipment installed at that job site. Note that, when you select multiple pieces of equipment, Wintac will automatically create a line item in the WIP for each one.
- The **Add Equipment** window accessible from any customer record now includes a field for specifying the manufacturer name for the equipment you are entering.
- You can now have Wintac automatically update the Install/Service Date associated with each line item in a **proposal** to match a specified date field whenever you process the proposal into either a work order or an invoice. Similarly, you can have Wintac automatically update the Install/Service Date associated with each line item in a **work order** to match a specified date field whenever you process the work order into an invoice. You can specify any one of the following date fields: Call Date, Promise Date, Job Date, I/P Date, Due Date.
- A new **Service Reminder** postcard (6" x 4", for laser/inkjet) has been added to the Customer/Job Manager that gives you the ability to automatically print reminder postcards for customers who have upcoming service scheduled. The postcard includes the customer's address, your return address, and a reminder message that shows the date of scheduled service and a user-defined note based on the service type.
- A new **Tech** field with a dropdown list of technicians has been added to the Items & Amounts window that gives you the ability to track items usage by technician on a line-by-line basis. By default, whenever you add a new line item, Wintac will automatically fill in the Tech field to match the WIP's primary Tech. You can then optionally change the default to any other technician. In addition, the Items Usage & Profit Analysis Report has been enhanced with a new Limit to Tech filtering option.
- The following equipment tracking fields from the Items & Amounts window are now available for use in your custom-designed **Word forms**: Equipment Type, Item Type, Item Location, and Item Technician.
- A new **work order scheduling** option has been added to Business Options. When the option is turned on and a user attempts to schedule work at a specified job site, Wintac will check for any jobs (work orders or invoices) entered for that same job site within the past X days (where X is a user-specified number). If a job is found, a warning will pop up alerting the user of a potential duplicate booking or other conflict. Note that, if a prior job is found and password security is turned on, Wintac will require that the user enter an administrator password to process the work order. *This is a great safety tool for avoiding data entry or scheduling errors.*
- The **Items Usage & Profit Analysis** Report has been enhanced with an option to sort and group the report by the Department field from Items & Amounts. Using this option, Wintac will automatically compile and group items by department and, within department, subgroup items by the Item Code.
- Wintac's powerful **report builder** just got even better: You can now "**quick print**" any report based on a user-defined report-builder criterion for that report. So, for

instance, let's say you typically print an Equipment Service & Expiration Schedule Report sorted by "Job Name" for "Contract" customers within your "Commercial" division. You simply click the Save button to save all the filtering criteria and, whenever you wish to generate the report based on the same criteria, just click the Load button at that report. It couldn't be easier! *This is a tremendous timesaving tool for quickly generating commonly used reports!*

Inventory Management

- A new **Department** field has been added to the Inventory window for departmentalizing your items. The new field automatically populates the Department field in Items & Amounts when you insert inventory items into a WIP.
- The Inventory window can now optionally display the last date that an Item's Cost or Price was modified. Wintac automatically updates this date whenever a cost or price is changed either manually or via a purchase order.
- The Inventory Browse window now has a **Locate Any Text** feature that enables you to find specific inventory items based on any data embedded in the inventory record.
- The Inventory Browse window now has an **Insert Item** feature that enables you to instantly insert an item into the underlying WIP - without leaving the Browse view.
- The Inventory Browse window now includes a column to display the item's **Model Number**.
- The Inventory Browse window now has an **alternate scrolling mode** that highlights the record you are on as you scroll. This makes it easier to see exactly where you are on the list at all times.
- You can now print **inventory labels** with dimensions of 2.25" x 1.25" formatted specifically for the Wasp WPL305 Thermal Label Printer. You can also select to include a bar code for the item based on either the item's UPC code or, for equipment, the Model Number.
- You can now optionally have Wintac require that users select a serial number for an inventory item whenever adding **serialized inventory** to Items & Amounts. This feature ensures that serialized inventory is accurately accounted for and tracked. (not available in Wintac Green)
- Wintac's powerful **Inventory Pricing per Customer** feature has been enhanced with an option to individually specify a percent markup or discount of the default price of each item for each customer, rather than a fixed dollar price. So, for example, you could specify that item XYZ always defaults to a 10% discount whenever selected in Items & Amounts for the *Jones Company*.
- Wintac's **Inventory Import** feature from Microsoft Excel spreadsheets now supports automatic import and update of all inventory fields in Wintac.
- Wintac's powerful **report builder** just got even better: You can now "**quick print**" any report based on a user-defined report-builder criterion for that report. So, for instance, let's say you typically print an Inventory Reorder Report sorted and grouped by the items' "Group", limited to a specific manufacturer, and further limited by the specified contents of a user-defined inventory field. You simply click the Save button to save all the filtering criteria and, whenever you wish to generate the report based on the same criteria, just click the Load button at that report. It couldn't be easier! *This is a tremendous timesaving tool for quickly generating commonly used reports!*
- You can now set an option that requires users to specify the **inventory location** associated for items whenever adding line item in Items & Amounts. When a line

item is first added, the location field will default to blank and not allow the user to exit that line item until an inventory location is selected. (not available in Wintac Green)

- The **Items Usage & Profit Analysis** Report has been enhanced with an option to sort and group the report by the Department field from Items & Amounts. Using this option, Wintac will automatically compile and group items by department and, within department, subgroup items by the Item Code.
- You can now export your **picture attachments** in Wintac directly to Microsoft Word documents. This gives you the ability to select the pictures to be exported from Wintac's Picture Browse window and then have Wintac automatically create and format multiple pictures per page on a new Word document.

Purchase Orders

- Items & Amounts now has a real-time multi-line listing option. This new feature displays a scrollable list of items as you enter them. Review entered items without paging back and forth. *One of the year's most requested enhancements!*
- You can now select any associated pictures, Word/PDF files, and Excel spreadsheets to attach to **emailed** purchase orders. Simply check off the documents you wish to include with the email and Wintac does the rest. *One of the year's most requested enhancements!*
- You can now set an option that requires users to specify the **inventory location** associated for items whenever adding line item in Items & Amounts. When a line item is first added, the location field will default to blank and not allow the user to exit that line item until an inventory location is selected. (not available in Wintac Green)
- A new option for **posting purchase orders** gives you the ability to specify when Wintac should create the A/P bill by entering a "P" (for Post) in the purchase order's status field. In addition, with this new option, items from the purchase order will not be posted to the specified job(s) until the "P" is entered in the purchase order's status field.
- A new setting in Business Options allows you to control whether or not **Item Codes** appear on printed purchase orders. Previously, one global setting controlled this option for all WIP types.
- A new setting in Business Options allows you to control whether or not the **Division** field appears on printed purchase orders.
- You can now print **inventory labels** with dimensions of 2.25" x 1.25" formatted specifically for the Wasp WPL305 Thermal Label Printer.
- In addition to its existing sort options, the **Batch Printing/Emailing** feature for purchase orders has been enhanced with a new "Sort by Job Number" option and a new "Limit to Division" option.
- You can now select to have **purchase orders** show up on the DailyView, MonthlyView, and/or WeeklyView boards, as well as the Job Control Center.
- The *Address 1* and *Address 2* fields for the **Job Site** now have user-definable labels. So, for example, you might change the *Address 1* label to *Contact*, and the *Address 2* label to *Street*.
- The following additional fields from the Items & Amounts window are now available for use in your custom-designed **Word purchase orders**: Equipment Type (not available in Wintac Green) , Item Type, Item Location, and Item Technician.
- The **Items Usage & Profit Analysis** Report has been enhanced with an option to sort and group the report by the Department field from Items & Amounts. Using this option, Wintac will automatically compile and group items by department and, within department, subgroup items by the Item Code.

- You can now export your **picture attachments** in Wintac directly to Microsoft Word documents. This gives you the ability to select the pictures to be exported from Wintac's Picture Browse window and then have Wintac automatically create and format multiple pictures per page on a new Word document.

Job Costing, Profit Analysis, and Budgeting Analysis

- The **Receipt History** report has been enhanced with an option to include the associated job's **profit margin** next to each receipt.
- A new option for **posting purchase orders** gives you the ability to specify when Wintac should create the A/P bill by entering a "P" (for Post) in the purchase order's status field. In addition, with this new option, items from the purchase order will not be posted to the specified job(s) until the "P" is entered in the purchase order's status field.
- The **Items Usage & Profit Analysis** Report has been enhanced with an option to sort and group the report by the Department field from Items & Amounts. Using this option, Wintac will automatically compile and group items by department and, within department, subgroup items by the Item Code.
- Wintac's powerful **report builder** just got even better: You can now "**quick print**" any report based on a user-defined report-builder criterion for that report. So, for instance, let's say you typically print a Job Cost & Analysis Report sorted and grouped by "Technician" for "Install" jobs within your "Commercial" division. You simply click the Save button to save all the filtering criteria and, whenever you wish to generate the report based on the same criteria, just click the Load button at that report. It couldn't be easier! *This is a tremendous timesaving tool for quickly generating commonly used reports!*
- A new alternate **Visual Job Costing** window in the Employee/Payroll manager gives you the ability to post a technician's hours to multiple jobs at once rather than posting hours for only one job at a time. From this new Visual Job Costing window, you will be able to enter the number of hours, enter the post date, and select the type of hours from a drop down list for each of the technician's jobs. *One of the year's most requested enhancements!*

Customer & Job Site Manager

- Integration between the **Contact Manager** and **Customer Manager** has been significantly enhanced. You can now associate any contact records in the Contact Manager with a customer record in the Customer Manager. Then, when you click the *Contacts* button at a customer record, the contact information from the Contact Manager will appear in the pop-up window. In addition, you can add new contacts directly from a customer record in the Customer Manager and then access them from the Contact Manager.
- The global edit capabilities in the Customer Manager now include an additional "filter by County" dropdown list option that enables you to limit changes based on the **county** that the customer is in.
- A new **Modify Balance Forward** option has been added to the *Edit All Customers* window that gives you the ability to globally turn on or off, for a range of customers, the feature to include previous outstanding balance on invoices.
- The Customer screen's pop-up Work History window can now optionally include **proposals**, along with work orders and invoices.
- The *Address 1* and *Address 2* fields on the **Customer** screen now have user-definable labels. So, for example, you might change the *Address 1* label to *Contact*, and the *Address 2* label to *Street*.

- The *Address 1* and *Address 2* fields on the **Job Site** window now have user-definable labels. So, for example, you might change the *Address 1* label to *Contact*, and the *Address 2* label to *Street*.
- The **Job Site Search** capabilities at the Customer Job Sites window have been enhanced with options to search and sort by either the Map field or the Route field.
- A new **work order scheduling** option has been added to Business Options. When the option is turned on and a user attempts to schedule work at a specified job site, Wintac will check for any jobs (work orders or invoices) entered for that same job site within the past X days (where X is a user-specified number). If a job is found, a warning will pop up alerting the user of a potential duplicate booking or other conflict. Note that, if a prior job is found and password security is turned on, Wintac will require that the user enter an administrator password to process the work order. *This is a great safety tool for avoiding data entry or scheduling errors.*
- You can now **email** the Job Schedule report to techs in the field from anywhere in Wintac that it can currently be printed. So, whether you are at a customer record, the Job Control Center, or any dispatch board view, you can now instantly send a complete schedule of work covering any time period to your techs' PDA, smartphone, laptop, or tablet computer in the field. *One of the year's most requested enhancements!*
- The **Customer Reference List** report has been significantly enhanced to allow you to generate reference lists based on a wide array of options. If you track installed equipment, you can even have Wintac generate the list based on the equipment installed at customer locations over a specified date range. This gives you the ability to limit the reference list to those existing customers that best relate to what the new prospect is looking for.
- Wintac's powerful **Inventory Pricing per Customer** feature has been enhanced with an option to individually specify a percent markup or discount of the default price of each item for each customer, rather than a fixed dollar price. So, for example, you could specify that item XYZ always defaults to a 10% discount whenever selected in Items & Amounts for the *Jones Company*.
- All customer **Sales Journals** reports have been enhanced with an option to include all individual transactions *or* show only a summary of the transaction totals.
- Any customer sales reports that currently enable users to limit the report based on the contents of the invoice's SP (salesperson) or Tech fields now also allow limiting based on the **Project Manager** field.
- Wintac's powerful **report builder** just got even better: You can now "**quick print**" any report based on a user-defined report-builder criterion for that report. So, for instance, let's say you typically print a Job Cost & Analysis Report sorted and grouped by "Technician" for "Install" jobs within your "Commercial" division. You simply click the Save button to save all the filtering criteria and, whenever you wish to generate the report based on the same criteria, just click the Load button at that report. It couldn't be easier! *This is a tremendous timesaving tool for quickly generating commonly used reports!*
- You can now export your **picture attachments** in Wintac directly to Microsoft Word documents. This gives you the ability to select the pictures to be exported from Wintac's Picture Browse window and then have Wintac automatically create and format multiple pictures per page on a new Word document.

Contact Manager

- Integration between the **Contact Manager** and **Customer Manager** has been significantly enhanced. You can now associate any contact records in the Contact Manager with a customer record in the Customer Manager. Then, when you click

the *Contacts* button at a customer record, the contact information from the Contact Manager will appear in the pop-up window. In addition, you can add new contacts directly from a customer record in the Customer Manager and then access them from the Contact Manager.

- Wintac's powerful **report builder** just got even better: You can now "**quick print**" any report based on a user-defined report-builder criterion for that report. So, for instance, let's say you typically print an Email Directory sorted by "Reference Code" and limited to a specific "Business type" and a specific "Tag Code". You simply click the Save button to save all the filtering criteria and, whenever you wish to generate the report based on the same criteria, just click the Load button at that report. It couldn't be easier! *This is a tremendous timesaving tool for quickly generating commonly used reports!*
- Each contact record in the Contact Manager now has two **user-definable fields** available for storing additional contact data. Both can be used as limits to filter contact management reports based on the contents of each field.
- The *Address 1* and *Address 2* fields on the **Contact Manager** screen now have user-definable labels. So, for example, you might change the *Address 1* label to *Contact*, and the *Address 2* label to *Street*.
- The **Contact Reference List** report has been significantly enhanced to allow you to generate reference lists based on a wide array of options. This gives you the ability to limit the reference list to those existing contacts that best relate to what the new prospect is looking for.
- You can now export your **picture attachments** in Wintac directly to Microsoft Word documents. This gives you the ability to select the pictures to be exported from Wintac's Picture Browse window and then have Wintac automatically create and format multiple pictures per page on a new Word document.

A/P & Checking Manager

- The **Chart of Accounts** window has been enhanced with an option to automatically update all transactions in all registers containing the G/L account that you modify. So, for example, if you change account 110011 to 110022, Wintac will ask if you wish to update all transactions that contain account 110011. If you say yes, each transaction containing account 110011 will be changed to 110022. *One of the year's most requested enhancements!*
- An **Accounts** icon has been added to the main A/P & Checking Manager screen. This gives you the ability to add, edit, and view G/L accounts directly from the main screen, as well as from the individual registers.
- The **A/P Viewer** has been significantly enhanced to enable users to make partial payments on multiple bills for a vendor with a single check. In addition, you now have the ability to **Select All** or **Unselect All** the A/P bills displayed in the viewer with a single mouse click.
- When viewing/editing a bank deposit transaction in an account register, the **Show Receipts** window now also includes a column displaying the Invoice Date of the invoice to which the receipt has been applied.
- Wintac now supports the standardized **Open Exchange File** (OFX) format for importing bank account transactions from your financial institution via the internet directly into your bank registers in Wintac. *One of the year's most requested enhancements!*
- In addition to the existing layouts, check printing now also supports multi-purpose laser and inkjet check layouts with two vouchers above the check.

- The *Address 1* and *Address 2* fields on the **Vendor** window now have user-definable labels. So, for example, you might change the *Address 1* label to *Contact*, and the *Address 2* label to *Street*.
- A new option for **posting purchase orders** gives you the ability to specify when Wintac should create the A/P bill by entering a "P" (for Post) in the purchase order's status field. In addition, with this new option, items from the purchase order will not be posted to the specified job(s) until the "P" is entered in the purchase order's status field.
- When **posting employee payroll checks** to one of your defined checking account registers Wintac now automatically verifies whether or not the checks had been previously posted. If they have, a window will pop up showing you which checks have already been posted and advising you that they were not re-posted. This keeps you from inadvertently posting the same payroll checks multiple times.
- Wintac's powerful **report builder** just got even better: You can now "**quick print**" any report based on a user-defined report-builder criterion for that report. So, for instance, let's say you typically print an Accounts Payable Unpaid Bills Report sorted and grouped by "Payee Name" for "only bills that are due" and limited to your "Service" division. You simply click the Save button to save all the filtering criteria and, whenever you wish to generate the report based on the same criteria, just click the Load button at that report. It couldn't be easier! *This is a tremendous timesaving tool for quickly generating commonly used reports!*

Employee & Payroll Manager

- A new alternate **Visual Job Costing** window in the Employee/Payroll manager gives you the ability to post a technician's hours to multiple jobs at once rather than posting hours for only one job at a time. From this new Visual Job Costing window, you will be able to enter the number of hours, enter the post date, and select the type of hours from a drop down list for each of the technician's jobs. *One of the year's most requested enhancements!*
- The Payroll Manager now supports simple **IRA/401(K)** plans. The employee deduction screens have been enhanced to enable selection of the deduction line used as the plan deduction. You have the ability to mark specific employees as enrolled in the plan. You can choose to set the plan up as a matching or fixed plan, and specify either the fixed amount or matching percentage and the maximum yearly matching amount. *One of the year's most requested enhancements!*
- A new **Payroll Journal** report has been added to track the IRA/401(k) contributions. Reporting can be filtered by limiting based on payroll period, employee reference code, and/or employee type.
- You can now **email** the Job Schedule report to techs in the field from anywhere in Wintac that it can currently be printed. So, whether you are at a customer record, the Job Control Center, or any dispatch board view, you can now instantly send a complete schedule of work covering any time period to your techs' PDA, smartphone, laptop, or tablet computer in the field. *One of the year's most requested enhancements!*
- When **posting employee payroll checks** to one of your defined checking account registers Wintac now automatically verifies whether or not the checks had been previously posted. If they have, a window will pop up showing you which checks have already been posted and advising you that they were not re-posted. This keeps you from inadvertently posting the same payroll checks multiple times.
- A new **Tech** field with a dropdown list of technicians has been added to the Items & Amounts window that gives you the ability to track items usage by technician on a line-by-line basis. By default, whenever you add a new line item, Wintac will automatically fill in the Tech field to match the WIP's primary Tech. You can then

optionally change the default to any other technician. In addition, the Items Usage & Profit Analysis Report has been enhanced with a new Limit to Tech filtering option. *One of the year's most requested enhancements!*

- The **Calculate Hours** pop-up window in Items & Amounts now includes a dropdown list of all technicians assigned to the job. Simply select a technician and Wintac automatically fills in their assigned start and end times for the job, calculates the number of hours, and inserts the total into the Hrs/Qty field for that technician's line item. Tracking labor for your service people couldn't be easier!
- Any customer sales reports that currently enable users to limit the report based on the contents of the invoice's SP (salesperson) or Tech fields now also allow limiting based on the **Project Manager** field.
- Wintac's powerful **report builder** just got even better: You can now "**quick print**" any report based on a user-defined report-builder criterion for that report. So, for instance, let's say you typically print a Payroll Journal Report sorted and grouped by "Employee Name", limited to the "Deductions/Commissions" section, and further limited to only "Salespersons". You simply click the Save button to save all the filtering criteria and, whenever you wish to generate the report based on the same criteria, just click the Load button at that report. It couldn't be easier! *This is a tremendous timesaving tool for quickly generating commonly used reports!*
- You can now export your **picture attachments** in Wintac directly to Microsoft Word documents. This gives you the ability to select the pictures to be exported from Wintac's Picture Browse window and then have Wintac automatically create and format multiple pictures per page on a new Word document.

Financial Reporting

- The Financial Reports print window now includes a button for instantly updating all recurring entries. This ensures that all your **recurring transactions** are current in all your account registers before generating financial reports such as Profit & Loss Statement, Balance Sheet, etc.
- All **Sales Journals** reports have been enhanced with an option to include all individual transactions *or* show only a summary of the transaction totals.
- Any customer sales reports that currently enable users to limit the report based on the contents of the invoice's SP (salesperson) or Tech fields now also allow limiting based on the **Project Manager** field.
- The **Items Usage & Profit Analysis** Report has been enhanced with an option to sort and group the report by the Department field from Items & Amounts. Using this option, Wintac will automatically compile and group items by department and, within department, subgroup items by the Item Code.
- The filtering criteria for the **Receipt History** report has been enhanced with options to limit the report based on the contents of the associated invoice's SP (salesperson) and Tech fields.
- The **Receipt History** report has been enhanced with an option to include the associated job's **profit margin** next to each receipt.
- A new **Payroll Journal** report has been added to track the IRA/401(k) contributions. Reporting can be filtered by limiting based on payroll period, employee reference code, and/or employee type.
- Wintac's powerful **report builder** just got even better: You can now "**quick print**" any report based on a user-defined report-builder criterion for that report. So, for instance, let's say you typically print a Job Schedule Report sorted and grouped by "Technician" for "Install" jobs within your "Commercial" division. You simply click the Save button to save all the filtering criteria and, whenever you wish to

generate the report based on the same criteria, just click the Load button at that report. It couldn't be easier! *This is a tremendous timesaving tool for quickly generating commonly used reports!*

Data Security

- A new **data protection** feature has been added to Wintac that, when activated, will automatically backup your company database whenever you exit Wintac from the computer on which your database resides (i.e. the server). *This is a vital automation feature for those of you who just keep forgetting to back up your data!*

Bonus Offers

- Do you have new hires that need to learn Wintac fast? Sign them up for **Wintac Bootcamp** for just **\$99** when you place your Wintac Upgrade Order. That's an instant \$50 savings! Wintac Bootcamp is a one-hour private online basic training session with one of our own Wintac Personal Trainers. The one \$99 enrollment fee entitles you to have as many employees as needed participate in the training session. *Wintac Bootcamp is the fast and fun way to learn the basics of Wintac.*
- Want to provide your technicians and/or customers with online internet access to pertinent information in Wintac? Get the **Wintac Web Portal** for just **\$895** when you place your Wintac Upgrade Order. That's an instant \$100 savings! (Call for versions of Windows supported. Windows Server 2003 or higher recommended.)
- Need better office communication? Purchase **Intac Chat** for just **\$199** when you place your Wintac Upgrade Order. That's an instant \$100 savings! Intac Chat is the intra-office messaging app for your office network that requires no internet access. Instantly chat with other users on your local area network. Send both private and group messages. *Intac Chat is a great office productivity tool for companies with several users on their office network.*

Wintac 2012 System Requirements

- Pentium IV or better grade computer
- 512 MB or more RAM
- 300 MB or more hard disk space
- Screen resolution of 1024 by 768 pixels or higher
- Versions of Windows supported: 7, Vista, XP, 2000, Server 2008, Server 2003, Small Business Server 2011

For special upgrade pricing, call 1.800.724.7899 today.

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