

# Wintac Information Packet

Below is a summary compilation of the information provided on our website. Simply print this document for convenient offline reading.

## Frequently Asked Questions

### What is Wintac?

Wintac is the revolutionary, award-winning, and #1 best-selling all-in-one business automation software for field service, installation, and service contracting companies. Benefiting from 25 years of continuous development by our own team of world-class engineers, Wintac is the industry standard against which all others are compared.

Far more advanced than typical service management software and much more useful than generic accounting software, Wintac has no equal in the industry. In fact, Wintac is so recognized as the software of choice for field service companies, it literally sells itself. Our Wintac Advisors are trained not to "hard sell" but simply to answer your questions. Our philosophy is simple; if you understand what Wintac can do for your business, you will most likely buy it - People don't buy from pushy sales people, they buy from people who are willing to help them.

Please be aware that there are companies in the software industry that have used deception in their internet advertising to trick you into thinking the software for sale on their website is a Wintac product. Don't be fooled by imitators and "wannabes" - There is only one Wintac and it is developed, marketed, and supported solely by Intac International here in the U.S.A.

### How will Wintac help my business?

First and foremost, the incredibly powerful automation capabilities of Wintac allow you and your staff to get more done in less time. Much less time. Your office will be more organized. Daily tasks will be completed more accurately. Employees will be more productive. You will finally have the luxury of running your business rather than your business running you. And as productivity and efficiency increase, so do your profits.

Best of all, because Wintac is a true all-in-one program (see next question below), you have quick and easy access to all your vital business information. Instantly answer any management question:

*What does our work schedule look like for the next week? Which of our qualified service people are available for a job on Wednesday? How much time did John spend at customer sites this week? Are there any emergency calls for today? Which of our customer service agreements are up for renewal? When do the parts and labor warranties expire for that equipment we installed? Who are our most productive employees? Who owes us money and how much? Who are our most profitable customers? How much did they spend this year? How do this year's sales, expenses, and profits compare to last year? What was the profit on that big job last week? How much do we owe our vendors and when is it due? How many widgets do we have stocked in each vehicle? Which one of our suppliers has the best price for that widget? What does our cash flow look like?*

We could go on and on but you probably get the picture!

In a nutshell, Wintac gives you the ability to make better decisions and more money in less time. So, not only will you be able to afford that dream vacation, you'll also have the free time to take it! Make your life easier with Wintac.

## I see that Wintac is referred to as an **all-in-one** program for the field service industry. What exactly do you mean by "all-in-one"?

"All-in-one" refers to the fact that Wintac is a single, all-inclusive program for managing your entire business. While other service management programs may claim to be all-inclusive, none that we are aware of integrate all of the following components in one program:

*Field Service Management, Field Installation Management, Customer Relationship Management, Contact Management, Property Management, Vendor Management, Employee Management, Office Management, Sales/Marketing Management, Purchase Management, Inventory Management, Payroll Management, Financial/Accounting Management, and Vehicle Management.*

Moreover, all of Wintac's components are seamlessly integrated with the same intuitive look and feel. While many programs are built around a jumble of separate, poorly-integrated modules, Wintac was designed from the ground up as a single all-inclusive system. The result is a faster, more stable program that is far easier to learn and use than products with comparable features.

And with Wintac's all-inclusive design, information entered once automatically flows to the relevant areas of the program - eliminating redundant and time-consuming data entry.

### **Wintac Rule #1 Software Should Really Do What They Say it Will Do**

Be aware that some companies claiming that their software is an "all-in-one-solution" for your business actually require you to use additional software to fully accomplish and integrate tasks such as job costing, purchasing, budgeting, check writing, payroll processing, A/P and G/L management, and financial reporting. Tip: Ask them if their software generates a balance sheet, trial balance, and income statement.

Don't think you'll need to use all of Wintac's features right away? No problem - Any portion of the software that you don't currently use stays quietly out of the way. Then, as your business needs grow, Wintac will grow right along with you. In fact, even if you choose to use QuickBooks, rather than Wintac, for your accounting, Wintac's built-in state-of-the-art link sends data and updates your financial records in QuickBooks - at no additional cost!

## What makes Wintac better than other software designed for the service industry?

Wintac has many significant advantages over competing programs. The most obvious being the true all-inclusive aspect, as discussed above, coupled with its unmatched power and flexibility.

Wintac is also unique in its intuitive, simple-to-learn, simple-to-use design. Our users frequently tell us that they were amazed at how quickly they became productive - often on the very first day! Compare that with most service industry programs that require weeks of preparation and learning just to accomplish basic tasks.

## Can you sum up the secret to Wintac's wide-spread success in the field service industry?

Very simply, we didn't design Wintac to look like all the run-of-the-mill programs out there. Instead of cloning other user interfaces, we listened to professionals in industries like yours and developed a smarter, faster, easier way to work.

Take Wintac's unique *Job Control Center* for instance. From estimating to scheduling to routing to dispatching to purchasing to billing, the Job Control Center gives you the power to manage the entire life cycle of your jobs from one central location. Now that's efficiency!

## Does Wintac require training to get started?

No. If you don't want to spend a lot of time getting started with new software, Wintac is for you! Wintac installs itself automatically and requires no extensive configuration before you can start using it. The Wintac QuickStart Wizard walks you through a simple step-by-step set up and you're ready to go - within minutes!

### **Wintac Rule #2 Software Should Be Easy**

And to make learning fun and easy, Wintac comes with a lesson-by-lesson voice-narrated tutorial, built-in Audio Tips voice assistance, and an intelligent help system that provides step-by-step instructions on each area of Wintac. You also have one-click access to our free live online support center right from inside Wintac, as well as quick and easy access by telephone.

Because we realize that some people feel most comfortable with formal training, we also offer several training options ranging from beginner to advanced level. Depending on your preferred style of learning, you can choose from the following: hands-on workshops at our classroom facility, on-site training at your office location, and private remote training with one of our own Wintac experts via web teleconferencing technology. Regardless of how you learn best, we have the resources to assist you.

## Is Wintac designed for my industry?

If your day-to-day business involves field service, then YES. Our three editions of Wintac - Wintac Green, Wintac Pro, and Wintac Fuel - cover the needs of virtually any type of field service and contracting operation. You can even configure most areas of Wintac to use the vocabulary that best suits your business and industry.

Although our roots are in HVAC, plumbing, and other sectors of the contracting industry, our huge user base encompasses the entire field service industry including (in alphabetical order):

*Air Conditioning, Alarm & Security, Appliance Repair, Automotive Detailing, Cabling Installation, Carpet Cleaning, Chimney Sweeping, Commercial Cleaning, Computer Repair, Computer Services, Construction, Copier Machine Repair, Drain Cleaning, Electrical, Facility Management, Fitness Equipment Repair, Flooring, Fuel Oil Delivery, Furnace Service, Furniture Repair, General Repair, Handyman Services, Heating, HVAC, Irrigation, Janitorial, Landscaping, Lawn Care, Locksmith Service, Maid Service, Masonry, Mobile Auto Repair, Overhead Door Install/Repair, Painting, Pest Control, Plumbing, Pool & Spa, Propane Delivery, Property Management, Refrigeration, Refurbishing, Remodeling, Residential Cleaning, Restoration, Roofing, Septic Cleaning, Sheet Metal Fabrication, Snow Removal, Tanning Equipment Repair, Telecommunications, Tree Service, and Window Cleaning.*

In addition, industry-specific specialty options, including custom programming services, are also available. For specialized business needs, Wintac is the #1 solution!

## What is the difference between Wintac Pro, Wintac Green, and Wintac Fuel?

Wintac Pro, Wintac Green, and Wintac Fuel are all full-featured business management programs for the field service industry. Wintac Pro includes features vital to equipment installation/service

management and specialty construction projects. Wintac Fuel includes features vital to fuel delivery management. Here are the specifics...

**Wintac Green** is designed primarily for Carpet Cleaning, Window Cleaning, Residential Cleaning, Commercial Cleaning, Janitorial Service, Maid Service, Pest Control, Lawn Care, Landscaping, Snow Removal and other service trades.

**Wintac Pro** is designed primarily for HVAC, Plumbing, Refrigeration, Electrical, Appliance Repair, Roofing, Overhead Door, Pool & Spa, Equipment Repair, Cabling & Communications, Alarm & Security, Computer Repair, and other service and installation contractors. It has all the features of Wintac Green plus: customer equipment installation and follow-up service tracking, multi-location serialized inventory management, progress billing, AIA billing, and certified payroll reporting.

**Wintac Fuel** is designed for service contractors who also provide fuel delivery services. It has all the features of Wintac Pro plus additional industry-specific features for the management of oil, propane, and kerosene delivery.

## What is the price of Wintac?

Complete, clear, and exact pricing for each edition of Wintac is available on the Pricing page.

With Wintac, there are no set-up fees, no activation fees, no monthly charges, no "per job" costs, and no additional costs for technical support. Very simply, there are no hidden charges!

### **Wintac Rule #3 Software Should Be Affordable**

Without exception, Wintac is the absolute best software value in the service industry. Don't be fooled by companies that...

Require you to pay an "activation" fee above and beyond the price of their software  
Require you to pay a "set-up" fee followed by never-ending monthly charges  
Charge \$10,000 and up for substandard or antiquated software

The fact is, Wintac is more powerful, more flexible, more reliable, and easier to use than programs selling at several times its price. And, remember: You pay once for Wintac and it is yours to use forever.

## Above and beyond the price of Wintac, how much should we expect to pay for technical support services?

**\$0.** That's right. Wintac's unparalleled ease-of-use and reliability allow us to include a full year of unlimited technical support services at no additional cost. Whether via phone, online, email or fax, our in-house staff of Wintac experts are dedicated to providing you with the absolute best service possible. We are talking true world-class support that is never outsourced.

Moreover, unlike most software companies in the service industry, we offer live support and do not require you to submit online request forms or leave voice mail messages during normal business hours.

## How does the price of Wintac compare to competing products?

First off, since we know of no other software for the field service industry with the wealth of features included in Wintac, we really have no direct competition. Moreover, any program with

close to Wintac's functionality typically costs thousands more. And, even at that, you will likely pay extra for required training and comparable technical support services.

Some companies even try to mask the excessive cost of using their software by charging on a monthly basis, requiring you to pay a "set-up" fee plus ongoing charges month-after-month and year-after-year - forever. A few even charge extra if you exceed a maximum number of jobs per month! And, since these programs tend to be very limited in functionality, you will likely outgrow them or, at least, need to purchase additional software to fully manage your business.

Companies that base their pricing on never-ending "subscriptions" have also been known to raise their monthly rates whenever it suits them. Of course, if you refuse to accept the higher rates, they can simply lock you out of the software. Moreover, if they go out of business, they put your business at risk! You are effectively their prisoner until you cut your losses and start all over with new software. As you can see, the long term costs and risks of subscription-based solutions with never-ending monthly fees are mind boggling!

On the other hand, once you purchase Wintac, you are under no obligation to spend any more money with us. You own your license to use the software and you own and have full control over your data. That means long-term savings and security for your business - and no stress!

## What are the system requirements for Wintac?

Wintac runs great in most typical Windows-based PC configurations and local area networks. The specific requirements are:

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: 8, 7, Vista, XP, 2000, Server 2003 or newer

## How often do you update and offer new versions of Wintac?

We release one major upgrade of Wintac each year and make it available to registered owners at a small fraction of the retail price. Upgrades include all the enhancements since your version plus another full year of unlimited technical support services. And, rest assured, if you choose not to upgrade in any given year, your version of Wintac will not shut off. Nor will you have to purchase and install "missing" versions when you eventually do upgrade. Keeping your software up to date couldn't be easier or more cost-effective!

## What about all the data we've accumulated in our current software?

Owners of QuickBooks (call for versions supported) can use Wintac's built-in tools to easily convert their vital QuickBooks data to Wintac themselves. Just point and click to read your current customers (including outstanding balances), job locations, contacts, inventory, vendors, and even work history from QuickBooks directly into Wintac. In addition, our in-house team of data conversion experts can cost-effectively convert data from virtually any business management, service management, contact management, or accounting software. We make switching to the power of Wintac easy!

# Wintac Features

## Customer Relationship Management (CRM)

- Manage an unlimited number of customers with unlimited job sites, properties, and contacts per customer.
- Unique customer-centered design allows you to instantly view complete service, job, and billing history.
- Enter an unlimited amount of searchable, free-form notes for each customer, job site, and job.
- Instantly toggle between full-record page view and multi-record browse view of your customer data.
- Activate automatic pop-up notices and alerts for any customer to remind users of critical information.
- Use the built-in Letter Writer with automatic mail-merge to email and print from any customer record.
- Instantly sort and search your entire customer database. Locate customer data based on any criteria.
- Attach and view an unlimited number of pictures, documents, and spreadsheets to any customer record.
- Automatically detect possible duplicate customer records on-the-fly as you enter new customers.
- Easily track and analyze customer satisfaction data using the built-in Job Evaluation tool.
- Create a marketing profile for each customer based on a series of user-definable questions.
- Use the marketing profile to target and sell additional services and products to your customers.
- Automatic report builder generates countless customer management reports based on your exact criteria.
- Print mailing labels and personalized envelopes addressed to your customers and job locations.
- Enhance the customer management capabilities with your own user-definable fields.
- Designed to handle large volumes of data for superior performance as your business grows.
- With the optional Wintac Web Portal, you can even give your customers online access to their accounts.
- *With Wintac, there is no need to use any other CRM software for your customer relationship management!*

## Scheduling, Dispatching, and Work Order Management

- Schedule, dispatch, route, search, and sort jobs using the powerful multi-view Job Control Center.
- Instantly toggle between monthly, weekly, daily, and all-inclusive views of your jobs.
- Instant point & click drill-down to job and work order details.
- Effortlessly drag & drop jobs in the dispatch board to assign and re-assign technicians and crews.
- Customize the boards with modifiable layouts, user-defined color-coded statuses, and more.

- Schedule and track jobs from initial call to dispatch and completion all from one central location.
- Schedule jobs spanning multiple days with a single work order. Schedule multi-stage applications.
- Schedule jobs and assign service people based on company division.
- Automatically assign optimal service person based on job location.
- Instantly update job statuses and re-schedule jobs as needed.
- Automatically time-stamp job arrival and completion times for your service people.
- Create service agreements and automatically schedule recurring service and preventive maintenance.
- Support for simple to complex recurring schedules to handle virtually every type of job and customer.
- Support for multiple technicians per job and multi-person crew assignments.
- Simply click on an open slot for a service person to automatically create a new work order.
- Automatically identify and locate existing customers with optional Caller ID support.
- Dispatch service calls and send job schedules via two-way wireless messaging between office and field.
- Electronically capture and print signatures on work orders, proposals, and invoices via tablet computers.
- Generate work orders, job schedules, site directions, and routing sheets for your service people.
- Automatically generate work orders based on service requests entered by customers on your website.
- Street mapping and route optimization via Microsoft MapPoint®. (purchased separately)
- Built-in support for obtaining job directions via free Google Maps®.
- Built-in links to Global Positioning Systems (GPS) for vehicle monitoring. (call for GPS vendors supported)
- Built-in link to TomTom WEBFLEET for advanced fleet management. (purchased separately)
- Optionally export job schedules to MS Outlook® calendar.
- *Simply the most powerful, most versatile, and easiest-to-use scheduling and dispatching system ever designed!*

## Work History Tracking

- Track unlimited work history of all jobs and service for each of your customers, job sites, and properties.
- Instantly drill down to the original work order or invoice directly from the history view - with a single mouse click.
- Data from work orders and invoices automatically flows to work history - with no redundant data entry.
- *With Wintac, detailed work history for any customer, job site, property, and job is always at your fingertips.*

## Equipment Installation and Service Tracking (not available in Wintac Green)

- Manage detailed history of unlimited pieces of installed equipment for all your customers and properties.
- Instantly view installation and service history of any equipment at any location.
- Instantly drill down to the original work order or invoice directly from the history view - with a single mouse click.
- Track by model number, serial number, job site, description, manufacturer, vendor, department, and technician.
- Track by install dates, service dates, parts warranty expiration dates, and labor warranty expiration dates.
- Track service contracts and automatically schedule recurring service and preventive maintenance.
- Print customizable equipment history reports and work orders showing installations and service at each property.
- *Complete equipment installation and service tracking features!*

## Inventory Management

- Manage and track an unlimited number of inventory and non-inventory items with instant retrieval.
- Track on-hand stock levels in multiple warehouses and vehicles. (not available in Wintac Green)
- Track pricing from an unlimited number of vendors for each inventory item.
- For each inventory item, you can set three-column pricing and customer-specific prices.
- Assign and track serial numbers for any inventory items. (not available in Wintac Green)
- Assign custom markup and discount percentages for any item.
- Globally adjust and update pricing information based on user-definable criteria.
- Track average inventory cost valuation for each inventory item.
- Automatically generate vendor purchase orders based on minimum and optimal stock levels
- Automatically generate vendor purchase orders based on vehicle usage. (not available in Wintac Green)
- Automatically generate multiple vendor purchase orders for job fulfillment.
- Print inventory management and reorder reports, field price lists, and parts labels.
- Attach an unlimited number of pictures, documents, and spreadsheets to any inventory item.
- Import inventory and update pricing from Excel® spreadsheets, Tra-Ser® pricing system, and other formats.
- Built-in support for inventory barcode scanning and label printing.
- *Wintac's inventory management features give you high-end capabilities with unparalleled ease of use.*



## Item Lookup and Retrieval

- Automatically build a price file of unlimited items for storing material, parts, labor, and user-defined item types.
- Instantly lookup and insert any item into proposals, work orders, invoices, and purchase orders with no typing.
- *Wintac's innovative lookup and retrieval system gives you the power to get more done in less time.*

## Estimating and Proposal Writing

- Easily and quickly prepare professional proposals, quotes, and estimates for your customers.
- Instantly lookup and insert equipment, material, labor, and other charges - with no typing.
- Built-in option to automatically calculate prices based on a user-definable percent markup over cost.
- Customize your proposals, quotes, and estimates with your own verbiage and detailed disclaimer text.
- Attach pictures, documents, and spreadsheets to any proposal, quote, or estimate.
- Email and print professional forms on plain paper in several formats - even design your own in MS Word®.
- Instantly convert accepted proposals, quotes, and estimates to work orders and invoices.
- *Wintac's powerful proposal writing capabilities give you the tools to win more jobs.*

## Visual Job Costing

- Full integration throughout Wintac enables you to post costing data with the flexibility to do it your way.
- Easily post job costs to work orders and invoices.
- Optionally post time/labor to jobs from employee payroll, or to employee payroll from jobs.
- Account for material and parts costs, overhead expenses, employee expenses, and additional labor burden.
- Generate job profitability and budget vs. actual cost reports.
- *Because Wintac is a true all-in-one solution, powerful visual job costing is a reality for your business.*

## Billing, Invoicing, POS, and Accounts Receivable

- Bill your customers using any method: T&M, Flat Rate, Progress, AIA, Point-of-Sale, and Automatic Billing.
- T&M billing with material, labor, and sales tax tracking.
- Flat rate billing with one-click processing.
- Progress Billing for ongoing construction jobs based on percent completion. (not available in Wintac Green)

- AIA G702/G703 Application for Payment form printing on plain paper. (not available in Wintac Green)
- Point-of-Sale (POS) processing and barcode scanning for quick cashier sales with optional cash drawer opening.
- One-step automatically scheduled service billing based on user-defined intervals.
- Automatically convert work orders to invoices - even convert multiple work orders to a single invoice.
- Multi-level sales tax support for standard and alternative sales tax calculation methods.
- Track and report multiple state and local sales tax rates, as well as Canadian GST/PST/HST tax.
- Full-featured accounts receivable tracking with 30-60-90 day invoice aging and receipt history.
- Secure credit/debit card processing directly from inside Wintac. (requires optional service)
- Email and print customizable customer invoices and change orders.
- Automatically generate customer statements in a variety of formats.
- Automatically calculate accrued interest and finance charges on customer statements.
- Apply and track partial payments, multi-invoice payments, and overpayment credits.
- View and print comprehensive sales history and revenue analysis reports.
- *No other field service billing and payment system gives you this level of power and flexibility!*

## Task Building and Flat Rate Pricing

- Eliminate redundant typing by building your own dynamic, reusable tasks, assemblies, and applications in Wintac.
- Use tasks to generate complete proposals, work orders, and invoices with a single mouse click!
- Prepare professional-quality flat rate books with multi-column pricing and custom headings and column titles.
- Apply and track partial payments, multi-invoice payments, and overpayment credits.
- View and print comprehensive sales history and revenue analysis reports.
- *Wintac's unique task-building feature is one of the most powerful office automation tools available anywhere!*

## Purchasing, Bill-paying, & Accounts Payable

- Automatically generate vendor purchase orders based on minimum and optimal stock levels
- Automatically generate vendor purchase orders based on vehicle usage. (not available in Wintac Green)
- Automatically generate multiple vendor purchase orders for job fulfillment.
- Full-featured accounts payable tracking with 30-60-90 day invoice aging payment history.
- Schedule and make automatic payments on recurring bills.
- Make a single payment covering multiple invoices from a vendor.
- Make partial payments on vendor invoices and track early payment discounts.
- Visual check writing with instant lookup of unlimited vendors and payables due.

- Print tax information to IRS 1099 Misc. Forms.
- Manage unlimited bank accounts with detailed activity reporting and automated bank reconciliation.
- Instantly transfer funds between bank accounts.
- Automatically generate and print bank deposit slips.
- Track the details of all credit card expenses.
- Download credit card transactions from most American Express, Visa, and MasterCard merchant services.
- *Wintac gives you the power to completely automate the bill-paying and banking process!*

## Financial Reporting and Graphing

- Prepare general ledger reports, income statements, balance sheets, trial balance, and cash flow forecasts.
- Generate comparative and departmentalized Profit & Loss reports.
- View and print any report, as well as output to standard PDF format.
- Analyze sales, expenses, and profits graphically with pie charts and line/bar graphs.
- Track company data by division and department, and optionally close periods.
- Sort, group, and filter your financial data with Wintac's state-of-the-art report builder.
- Use the built-in Accountant's Export to compile financial data in a QuickBooks®-compatible format.
- *Unlike most service management software, Wintac includes full accounting and financial reporting!*

## Employee and Payroll Management

- Manage all employee data including job categories, time sheets, payroll data, and unlimited notes.
- Track earnings, withholdings, time disbursement, and multiple rate categories for all your employees.
- Calculate and print payroll checks with year-to-date voucher data.
- Print payroll journals, tax liability reports, 940 and 941 forms, W-2 and W-3 forms.
- Print certified payroll reports. (not available in Wintac Green)
- Define your own custom deductions to track 401(k), insurance contributions, union dues, etc.
- Track employee productivity and profitability, as well as reimbursements for tools and other expenses.
- Automatically generate employee commissions based on user-defined criteria such as job sales or job profit.
- Built-in support for direct deposit to employee bank accounts and electronic filing of employee W-2 forms.
- Post time/labor to jobs from employee payroll, or to employee payroll from jobs.
- Note that Wintac currently supports withholding calculations based on U.S. payroll only.

- *Unlike most service management software, Wintac includes payroll processing and employee management!*

## Remote Access and Mobile Computing

- Send job data to and from email-enabled PDAs, smartphones, tablets, netbooks, and laptops for online access.
- Transfer and synchronize customer and job data between field and office computers for offline access.
- Support for electronic signature capturing using tablet computers.
- *Add the optional Wintac Web Portal for much more mobile computing power!*

## Vehicle Service and Maintenance Management

- Manage your entire fleet of vehicles.
- Log identification and registration data for each vehicle. Schedule periodic maintenance, inspections, etc.
- Log and track service records and service history for each vehicle.
- Schedule periodic maintenance, inspections, etc. for each vehicle.
- *Unlike most service management software, Wintac includes built-in vehicle management!*

## Contact and Prospect Management

- Manage all contact information for an unlimited number of prospects.
- Track sales leads, log calls and sales progression with an unlimited storage capacity for free-form notes.
- Use the built-in Letter Writer with automatic mail-merge to email and print from any contact record.
- Use the Letter Writer to automatically generate targeted sales correspondence and prepare bulk mailings.
- Attach and view an unlimited number of pictures, documents, and spreadsheets to any contact record.
- Instantly switch between full-record page view and multi-record browse view of your contact data.
- Instantly sort and search your entire contact database. Locate contact data based on any criteria.
- Create a marketing profile for each prospect based on a series of user-definable questions.
- Use the marketing profile to formulate targeted sales plans for converting prospects to customers.
- Automatically detect possible duplicate contact records on-the-fly as you enter new prospects.
- Automatic report builder generates contact management reports based on your exact criteria.
- Print mailing labels and personalized envelopes addressed to your contacts and prospects.
- Designed to handle large volumes of data for superior performance as your business grows.

- Once a prospect becomes a customer, instantly transfer all their data to the Customer Relationship Manager.
- *With Wintac, you can separately track your customers and prospects for easier management.*

## Fuel Delivery Management (available only in Wintac Fuel edition)

- Manage and automate your oil delivery, propane delivery, and kerosene delivery service.
- Schedule fuel deliveries based on degree days, K-Factor, or Julian Calendar intervals.
- Generate pricing per property based on fuel cost and a set profit margin, fixed amount over cost, or daily price.
- Set up automatic billing schedules per customer for payment plans, service contract premiums, etc.
- Print professional multi-part fuel delivery tickets automatically in batches or individually on demand
- Generate fuel delivery tickets based on user-definable routes and stops to maximize driver efficiency.
- Print management reports including fuel delivery statistics, profitability, and service history.
- *Manage the fuel delivery side of your business with the industry's most affordable solution!*

## Dashboard View: To-Do List Management

- Pop up a quick dashboard view of daily notifications and pending issues.
- View a summary of service calls, contract expirations, overdue accounts, and scheduled vehicle maintenance.
- Instantly pop up, view, and edit the reminder to-do list from virtually anywhere in Wintac.
- Track appointments, meetings, important dates, deadlines, etc.
- *Wintac's Dashboard view keeps you apprised of the day's activities.*

## Microsoft Office Integration

- Easily share data and communicate with Microsoft Word®, Microsoft Excel®, and Microsoft Outlook®.
- Design and create your own Wintac work order, invoice, estimate, and purchase order forms in Word.
- Attach Word documents and Excel spreadsheets to virtually any data in Wintac.
- Export job schedule data from Wintac to the calendar in Microsoft Outlook®.
- *Wintac makes it easy to integrate your data with your existing office applications.*

## Multi-Level Security Access System

- Customizable, multi-level password system with individual configurations for each computer.
- Hide financial information from restricted users.
- Restrict access or prohibit changes to specific areas and tasks within Wintac.

- Require mandatory fields be filled in by users.
- Audit trail feature to automatically monitor, log, and report on user session activity.
- Data encryption option for your company database to prevent back door access to proprietary information.
- Automatic company data backup and restore directly from inside Wintac.
- *Wintac provides the reliability and security protection features to keep your data safe.*

## Wintac Options and Services

### Wintac Web Portal ~ Real-Time Online Access with No Monthly Fees *The Ultimate Paperless Solution!*

The Wintac Web Portal gives Wintac owners the power to provide their customers and field service staff with real-time online access to pertinent data. A true web-based application, the Wintac Web Portal can be accessed from anywhere and works with any internet-capable laptop, netbook, tablet, or PDA (including **iPad**, **iPhone**, and **Android** devices). And, unlike competing products, the Wintac Web Portal is just a one-time charge for unlimited users. There are no monthly fees or other recurring charges from us!\*

Based on user preferences you set, you can give your technicians online access from the field to:

- View work scheduled for the day, week, or month
- View specifics of equipment installed at each location
- View service history of each piece of equipment
- View and update material, parts, labor and other charges on a work order
- Add new customers, proposals, quotes, estimates, work orders, and invoices
- View, print, and email proposals, quotes, estimates, work orders and invoices
- Capture and print signatures\*\* on proposals, quotes, estimates, work orders and invoices
- View and attach pictures and images associated with a job
- View and attach MS Word and PDF documents associated with a job
- View and attach MS Excel spreadsheets associated with a job
- Update job status and work details of completed calls
- Apply customer payments from the field
- Process credit card payments online (requires that you have an APT merchant account)
- Schedule jobs and service from the field
- Add notes to any work order for office use
- Get driving directions to customer locations via Google Maps

Based on user preferences you set, you can give your customers online access from their location to:

- View and update billing and account information
- View work history for one or more of their locations
- View specifics of equipment installed at each location
- View service history of each piece of equipment
- View a schedule of pending jobs and service calls
- View and attach pictures and images associated with a job
- View and attach MS Word and PDF documents associated with a job
- View and attach MS Excel spreadsheets associated with a job
- View outstanding invoices
- Make credit card payments online (requires that you have an APT merchant account)
- View payment history
- View and print a current statement of account
- Submit a request for service (i.e. customer self-scheduling)
- Provide feedback on customer satisfaction and monitor via Wintac management reports

\* The Wintac Web Portal is a true web-based app with a one-time charge of only \$1,495 (\$1,245 if purchased at the same time as Wintac - save \$250) and no additional "per user" costs. You get a free upgrade to the latest release of the Wintac Web Portal whenever you upgrade to a new release of Wintac! Call us at 1.800.724.7899 for versions of Windows supported.

\*\* Signatures can be entered using either a device with a touchscreen or a mouse.

## Data Conversion Services ~ Switching to Wintac is Simple

As you may have already learned the hard way, slick sales talk doesn't get you great software. Nor does it guarantee that the company behind the software will be there for you when you need them. Now that you are ready to switch to the time-tested and award-winning Wintac software, we are ready to help.

Every day of the week businesses just like yours, frustrated with the limitations of their current software, switch to Wintac - and we make it easy. Our in-house data conversion experts can quickly and cost-effectively import data into Wintac from virtually any other program.

Plus, QuickBooks® users (call for versions supported) can even choose to use Wintac's built-in tools to easily convert their QuickBooks data to Wintac themselves. Just point and click to read your current customers (including outstanding balances), job locations, contacts, inventory, vendors, and even work history from QuickBooks directly into Wintac.

For more than 25 years, users of every brand of service management software have switched to Wintac - resulting in thousands of successful data conversions. Because our experts are the best at what they do, we are able to convert your data faster, more accurately, and more affordably than anyone else. Call today to speak with a data conversion specialist.

## Wintac Custom Solutions ~ If You Can Dream It, We Can Do It

For most field service and contracting companies, Wintac's built-in features are all they need to fully automate and manage their business. Nonetheless, for very specialized or unique business practices, our elite team of custom solutions engineers can develop additional functionality designed to your exact specifications. Call today to speak with a custom solutions specialist.

## Intac Chat ~ The App for Providing Better Office Communication

Intac Chat is an intra-office messaging application for your office network that is simple to use, requires no internet access, and has virtually no learning curve. Instantly chat with other users on your office LAN. Send both private and group messages. Intac Chat can even be used with other applications and does not require Wintac. Price: \$299 (\$199 if also purchasing Wintac).

## ShieldTrack ~ The Wintac App for *American Home Shield*

Save time processing American Home Shield service requests. ShieldTrack transparently monitors MS Outlook and detects incoming service requests from American Home Shield. For each service request received, a work order is automatically created in Wintac under a defined American Home Shield record. The work order contains the job location, contract information, work description and any pertinent notes. A work order is also automatically generated under the customer who is having the work performed to facilitate the application of a service fee. ShieldTrack will even create a new customer record if that customer does not already exist in Wintac. This vital add-on for American Home Shield contractors has virtually no learning curve and integrates seamlessly with Wintac. One-time charge: \$399 (requires Wintac).

## Warranty Claim Export ~ The Wintac App for *ServiceBench*

With the addition of the Warranty Claim Export, you can easily and instantly export Wintac invoice data for electronic warranty claim filing via the ServiceBench processing system. This vital add-on for ServiceBench appliance repair businesses has virtually no learning curve and integrates seamlessly with Wintac. One-time charge: \$399 (requires Wintac).



## **Wintac Advantages**

### **A State-of-the-Art, All-in-One Solution for the 21st Century**

Wintac is a revolutionary all-inclusive solution that automates every area of your business in one simple to use program. The result is a faster, more reliable, easier to use, and affordable solution designed to make your business more productive and profitable than you've ever imagined!

Don't be fooled by software companies claiming that their product is an "all-in-one" solution that eliminates the need for other programs. The truth is most have limited capabilities and minimum accounting features, requiring you to juggle between at least two different programs to manage your business. The result is software that makes your daily tasks more time-consuming and difficult! Doesn't that defeat the purpose of using software in the first place?

### **Super-High Performance Design**

While many programs (e.g. legacy software, hosted solutions, etc.) run slow and choke from the stress of too much data, Wintac was designed to handle large volumes of data without compromising performance or data integrity for maximum power and reliability.

### **Unique User Interface: Easier, Faster, Smarter**

While most software companies want to impress you with how their software was designed to look like other generic programs on the market, we take pride in saying that Wintac is not a copycat of anything else out there. The result of years of feedback from countless professionals in your industry along with continual refinement as user interface technology evolves, Wintac's intelligent design gives you a smarter, faster, easier way to work. Invest a few short hours getting comfortable with Wintac and you will love the difference.

### **True Multi-user Networking**

Wintac is a true network-ready system that safely monitors network traffic while allowing concurrent access to your company data for each of your licensed users. Whether configured for a dedicated server, peer-to-peer, or Terminal Services environment, Wintac's networking provides the reliability, performance, and security our users have come to expect.

### **Manage Unlimited Companies**

With many programs it is not possible to manage more than one company using a single installation of the software. However, Wintac's sophisticated design allows you to manage as many companies from a single installation as you need. You can even switch from one company database to another without ever leaving Wintac. And, of course, there is no additional charge to manage multiple companies.

### **Built-in Accounting**

While many service management programs include invoicing and accounts receivable capabilities, most lack the ability to manage your accounts payable, check writing, credit cards, employee payroll, general ledger, and financial reporting (such as Income Statement, Trial Balance, Balance Sheet, and Cash Flow Forecast).

Instead, they require you to also use a separate accounting program. Not only is that more costly and cumbersome, it also severely compromises your ability to fully automate your business.

Critical tasks such as job costing, purchasing, and employee time tracking are far more easily and efficiently accomplished in a true all-in-one system.

## But if you really want to continue using your current accounting software...

Because we realize that some companies may be comfortable with the accounting software they have been using for years, Wintac comes with a built-in state-of-the-art link to QuickBooks®, as well as links to other accounting programs such as Peachtree® and Simply Accounting® - at no additional charge. Compare that with software vendors that expect you to pay an additional fee to transfer data from their program to an accounting program! As you can see, with Wintac, it's all about giving our customers maximum flexibility and value.

## Specialty Construction Features

For contractors involved in construction, Wintac automates and manages all your job costing, budgeting, estimating, proposal writing, and T&M billing tasks. Plus, Wintac Pro even adds built-in support for equipment installation tracking, multi-location serialized inventory management, progress billing, AIA billing, and certified payroll reporting. That is why, for over 25 years, HVAC, plumbing, electrical, refrigeration, and other specialty contractors have relied on our software, more than any other, to run their businesses.

## Unlimited Free Technical Support

Our reputation for customer satisfaction is legendary. Wintac's unparalleled ease-of-use and reliability allow us to include a full year of live, unlimited technical support services at no additional cost. Whether online or via phone, email or fax, our in-house staff of Wintac experts is dedicated to providing you with the absolute best service possible. And remember, there are no "maintenance fees", "per call" charges, "membership fees" or other hidden costs.

## No Training Required - It's That Easy

We hear from users all the time that, after struggling for months with other programs, they are simply amazed at how comfortable they felt with Wintac in just a matter of days! Wintac installs itself automatically and requires no extensive configuration before you can start using it. The Wintac Wizard walks you through a quick and simple set up and, within minutes, you are off and running!

And to make learning fun and easy, Wintac comes with a lesson-by-lesson voice-narrated tutorial, built-in Audio Tips voice assistance, and an intelligent help system that provides step-by-step instructions on each area of Wintac. You also have one-click access to our live online support center right from inside Wintac, as well as quick and easy access by telephone.

## But if you really want training...

Because we realize that some people feel most comfortable with formal training, we also offer several training options ranging from beginner to advanced level. Depending on your preferred style of learning, you can choose from the following: hands-on workshops at our classroom facility, on-site training at your office location, and private remote training with one of our own Wintac experts via web teleconferencing technology. Regardless of how you learn best, we have the resources to assist you.

## Optional Low-Cost Annual Upgrades

We release one major upgrade of Wintac each year and make it available to registered owners at a small fraction of the retail price. Upgrades include all the enhancements since your version plus another full year of unlimited technical support services. And, rest assured, if you choose not to upgrade in any given year, your version of Wintac will not shut off. Nor will you have to purchase and install "missing" versions when you eventually do upgrade. Keeping your software up to date couldn't be easier or more cost-effective!

## Built-in Data Conversion

Owners of QuickBooks (call for versions supported) can use Wintac's built-in tools to easily convert their vital QuickBooks data to Wintac themselves. Just point and click to read your current customers (including outstanding balances), job locations, contacts, inventory, vendors, and even work history from QuickBooks directly into Wintac. In addition, our in-house team of data conversion experts can cost-effectively convert data from virtually any business management, service management, contact management, or accounting software. We make switching to the power of Wintac easy!

## International Support

Wintac supports alternate date formats as well as international currency including Dollars, Pounds, Riyals, and Euros. Wintac also links with the Canadian edition of QuickBooks®.

## Unbeatable Value

Without exception, Wintac is the best software value in the service industry. It is more powerful, more flexible, more reliable, and easier to use than programs selling at several times its price. In fact, with our Best Price Guarantee, we will even match the price of any competing product offering features and support comparable to Wintac for less. And, remember: You pay once for Wintac and it is yours to use forever.

## Designed to Grow with your Business

Wintac equally benefits both small and large service contractors. For our smaller users (including 1-person shops), Wintac's unique automation capabilities provide leverage against their largest competitors without requiring a dedicated office staff. For our larger users, Wintac has the high-end features, flexibility, scalability, and reliability that their office and field staff need to compete on any level.

## Backed by a Name you can Trust

With over 25 years experience developing and supporting the world's most widely-used all-in-one business management software for service contractors, Intac International has a proven track record that you can feel safe with. Our software is used by over 7,000 companies and 50,000 service and installation professionals spanning every state and many countries - virtually all of them switching from another business management program.

And with our commitment to continually enhance our software, you can be sure that we will keep your business on the cutting edge!

Our mission statement is simple and straightforward: To build the very best software and provide the very best support service - all at the very best price. In a nutshell, we do whatever it takes to keep our customers happy so that they remain customers for life.

## Contact Us

We are contacted everyday by businesses like yours. Our goal is to answer your questions and provide you with guidance. If Wintac is not right for you, we'll tell you! We are here to help, so call us to schedule a private demonstration, ask some questions, or just get to know us better - you will be happy you did!

### Intac International, LLC

Developers and Publishers of Wintac All-in-One Business  
Automation Software for the Field Service Industry

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