



Benefits of Moving from Contrac2 to Ascente

The following are features available in the base product that have no additional charge:

- Can use a mouse to navigate the menus/screens
- Can enter upper and lower case letters in all text fields, along with any of the special characters
- No limit to the amount of text that can be entered in key text fields, like Service Order Problem, Comments, etc.
- All reports can be previewed to the screen, where you can do a search for a word or drill down to more detail on certain reports
- Can place a Hotline call directly from the software, or establish a Hotline connection directly to your workstation
- Each month two topics are covered in Webinars at no extra charge. These are recorded and archived on our website for later viewing.
- Drag and Drop service call dispatching
- Store up to 5 phone numbers for Jobsites and Service Orders
- Wildcard lookups – find all jobsites on a certain street
- Add an unlimited amount of custom fields to any screen – date, number, text – can make them be required and optionally validate on a list you provide or against another table in the system
- Can change the ID of key fields with the click of a button – change tech 117 to read as 117-Joe Worker instantly, while everyone is still in the system
- Access data using standard tools such as Excel, Access and Crystal Reports without having to buy any interface programs
- Each user can adjust which fields the cursor will stop at, and the order for the fields on all Ascente screens
- Can set up custom Scripts that will display throughout Ascente on any screen. Can turn scripts on/off by user.
- Service Order, Work Order, Job and Quotes can include letters and special characters in the number. Can have the system append an "M" for maintenance service orders or include letters to identify the branch office.
- True Branch and Departmental reporting
- Active Financial Statements – preview a financial statement to the screen and drill down on the numbers to the source transactions
- All lookups are customizable by user – order of columns, can sort by any column, can adjust the width of any column
- Can run multiple options within Ascente/Traverse at the same time and only count as one license. Can have Call Taking, Call Inquiry and Work Order entry all up at the same time.
- The system has a place to store Customer, Jobsite, Vendor and Employee e-mail addresses, along with reports to export these for marketing purposes
- Can build a Favorites Menu by user that not only has Ascente menu items, but can also call websites or other external applications like Excel.
- All reports can be exported to Word, Excel, PDF, or a number of other formats. All reports can also be e-mailed.
- X-Charge credit card interface for credit card processing on Mobile or in the office for Work Orders or Cash Receipts
- Digital Dashboard – Executive Management tool to keep a pulse on key performance indicators
- Can store an unlimited number of General Ledger years



- Can store an unlimited number of Payroll years
- Payroll information is not cleared – reports can be run for any period at any time
- Can create a 3-tier lookup for your inventory for speed of entry – Water Heaters, Gas Water Heaters, Item Number
- The system stores and displays the time/date of when a transaction was created and also who last changed it and when
- Can print to any Windows supported printer – no longer have restrictions on printers
- Service Orders, Invoices, Statements, Purchase Orders, and Quotes all print on plain paper – we print the whole form. No need to buy expensive forms
- Ability to bill on a T&M method against a Job Cost Job
- Reprint any invoice at any time, including Job Cost invoices
- Extremely flexible financial statements that give the ability to see 12 months side by side, or see 4 quarters side by side.
- Built-in Productivity Reports that automatically export to Excel for ease of search and analysis
- Built-in history of user usage – which programs they used and when
- Ability to easily control which menu items a user can run along with which features within that item a user can select.
- An unlimited number of Pay Codes and Deductions can be set up in Payroll. Also can set up an unlimited number of 401K or Cafeteria Plan type of deductions
- Can print multiple checks for an employee in the same payroll run
- Can view the payroll check for an employee for any check at any time
- Automatic Sick and Vacation pay accruals
- GL Account Allocations – if \$100 is posted to account X, \$60 automatically posts to account Y and \$40 posts to account Z.
- Can amortize maintenance agreements
- Can do retention on a line item basis for Job Cost Jobs.
- Job Cost Inquiries that allow you to drill down to the details on a job, without having to print reports
- Can access hundreds of standard reports from Trends, to Marketing, to Sales Analysis that don't exist in CONTRAC2
- Flat Rate Module has the ability to analyze profitability by task and technician based on customer's real costs
- Maintenance tasking includes an equipment list and tasks
- Notes in the system are automatically time and date stamped by user
- Paging system allows users to easily identify and make changes to which fields they want sent to a technician

The following modules are available in Ascente/Traverse that are not available in CONTRAC2:

- Quotes – Enter and track Quotes and with a click to create a Service Order or Job Cost Job. Can automatically provide pricing based on markup from cost or desired profit margin
- Mobile Pro – Let your Techs enter their work on a device in the field and automatically upload to your server
- Notes Pro – Assign Priorities to notes where they show in different colors or pop-up on the screen for the user. Also link files or folders to a note (useful for linking jobsite pictures, permits, or scanned copies of Work Orders)
- Flat Rate – Import and Maintain your Flat Rate book, but also print your own book any time you want and include pictures for a professional touch
- Bank Reconciliation – Clear your A/P and Payroll checks along with Deposits.
- Banking – Direct Deposit, Bank Statement import for reconciliation, positive pay, and ACH payment processing for A/R and A/P
- Point of Sale – Interface directly with a cash register to track your daily counter sales

- Enhanced Payroll Tax Reporting – Process ALL Federal and State payroll reports directly on the system. No need to buy forms and can optionally e-file.
- Triggers – Have the system automatically e-mail your customer when a technician is dispatched, including a picture of the tech. The sky's the limit – make the system automatically take action when certain events occur.

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