

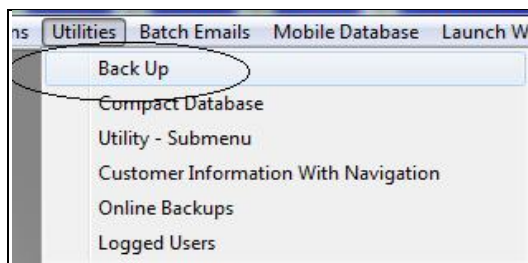
## New Year Scheduling Procedure for WinPCO

Each year all WinPCO customers must perform our annual new year scheduling for the upcoming year. It is recommended that this process is done the *last week of December or at the end of the month before January*. This procedure will allow you setup the schedule for the calendar year and create invoices for the New Year.

Step1: **BACKUP, BACKUP** WinPCO (Cloud) not required

Please make sure you have a complete backup of your data before running the New Year Scheduling. To backup the database simply go to Utilities and select

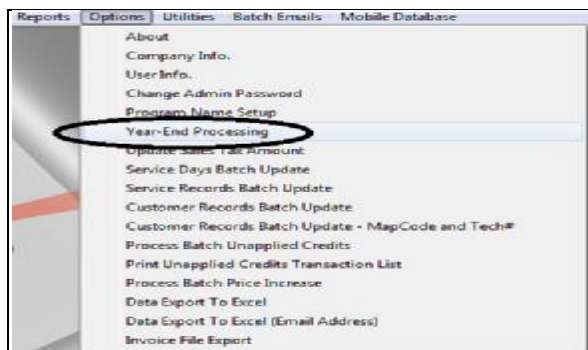
Backup



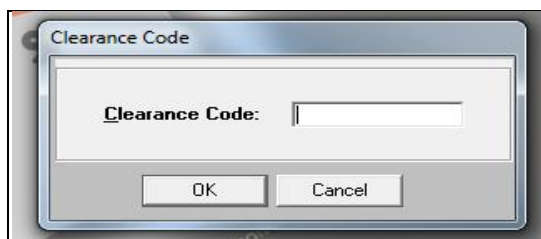
Click OK to start backup

Step: 2 Procedure to setup New Year Schedule

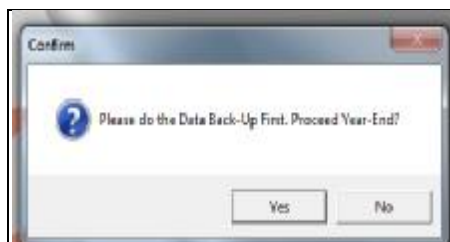
From the main screen in WinPCO you need to select OPTIONS and the Year End Processing. This will require a clearance code before proceeding. If you do not have your personal clearance code you need to contact A&K Computers to obtain one.



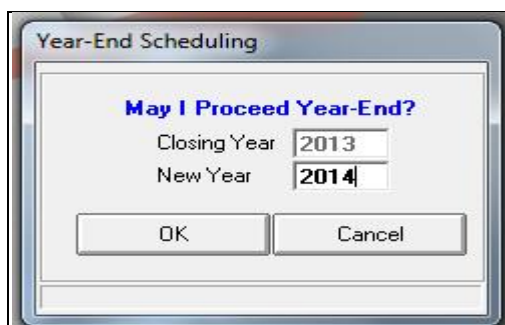
Step 3: enter clearance code



After entering in your clearance code the next screen will ask you have you did a backup YES/NO click YES to proceed.



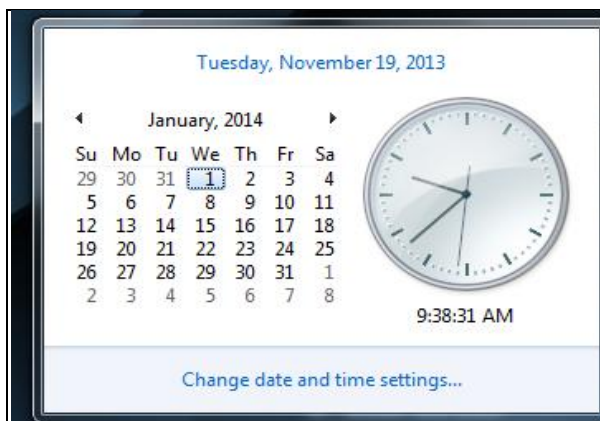
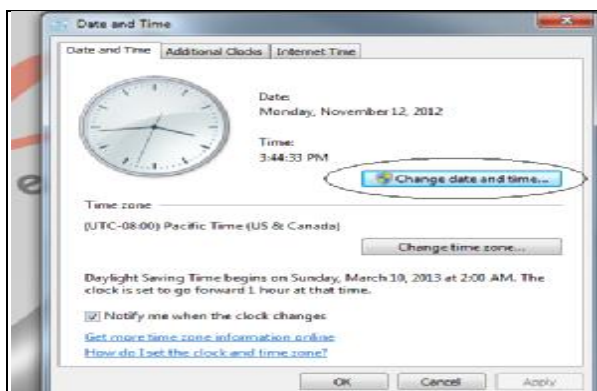
Step 4: The next screen will allow you to enter the New Year this process will take a few minutes to complete. The system will now schedule the New Year base on frequency and period to start.



## Step 5: Creating January Invoices for Local WinPCO only

To perform this procedure you need to change the date in your computer located lower right hand side where it shows the time on your desktop. Some computers like XP system you may need to double click on the Time/Date. For Windows 7, Vista Computers you need to select " Change Date and Time Setting" to proceed. Next, Windows 7/ Vista computers click on the bar Change Date/Time to access this screen click Apply and OK to accept the change.

### Step:6 Changing DATE on computer



Once the date and year has been change you can now create January invoices. At the main page select the menu Invoices and the Create Invoices. After creating January 2014 invoices you need to change your computer date back to December 2013 and current date repeat Step 6.

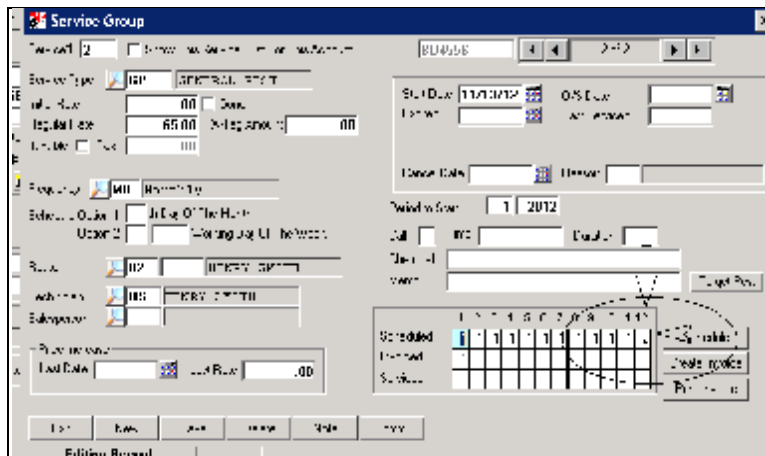
**Step 7: Important,**

*Once you have completed Year-End Process and created the next year January invoices. All new customers signed up for regular service or having a single service ( one-shot) and are schedule for service in January next year you need to create the invoice in December 2013 and change the invoice date to the scheduled date in January next year.*

**Step 8:**

**Next, make sure in December you click on the box 12 and change number one (1) to a (2).**

**This will create a invoice in December 2014.This applies to regular service only.**



**Important:**

*To setup the regular service be sure to change the date in your computer to January 2<sup>nd</sup> next year and change the Period To Start to the month the regular is to begin. Example: 01/2014 for monthly, 02/2014 Bi-monthly etc. click on schedule to setup the re-occurring service.*

**\*\*\* In January of the New Year be sure to run a START Report for December to see if ALL new customers are setup on re-occurring service.**

\*\*\*\*Note: Customers who started a regular pest program in December 2013 you might want to run a Start Report for December to make sure in the Schedule box it has the number one (1) so it doesn't create 2 invoices in December of the new year

\*\*\*\* If you are not on a maintenance support agreement you will be charge \$100 per incident for the call. Doesn't apply to WinPCO Cloud user.

## **New Year Scheduling WinPCO ( Cloud Users)**

For WinPCO Cloud user you will be following steps 2, 3, & 4 again, to begin this process you are going to need a clearance code.

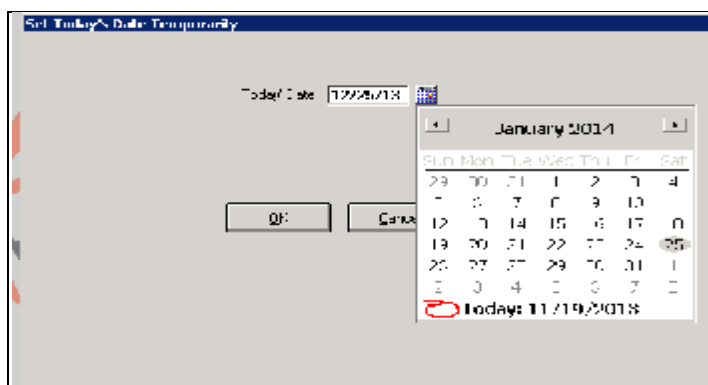
Step 2: Procedure for setup New Year Schedule

Step 3: Enter Clearance Code

Step 4: May I proceed with Year End

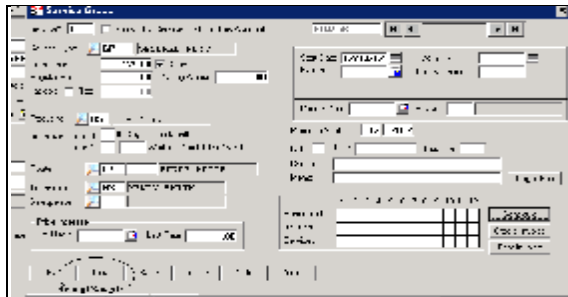
### **Creating January Invoices Cloud**

To create invoices for **January you do not need to change date** on your local computer. Simply set the date when creating invoice for next year.



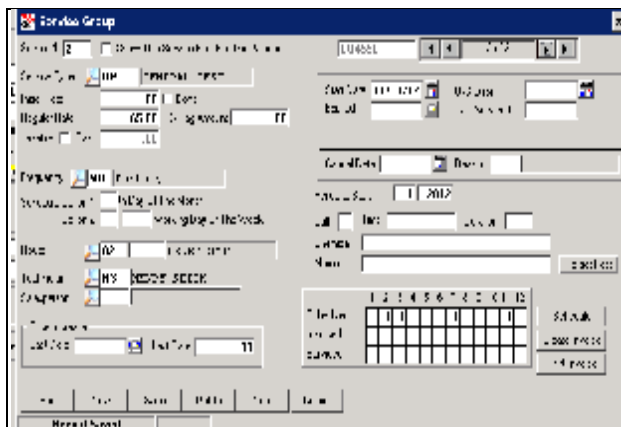
**Important:** Once you have completed the Year End Processing and created next year January invoices. All **new** customers who are having a single service O/S and are schedule for January next year you need to create the invoice in December 2013 and change the invoice date to the date schedule for in January next year.

To setup the regular service for WinPCO (CLOUD) it is going to be a little different because you cannot change the Date. So, to do this, first you create a One Shot service for December service is schedule for January change invoice date.



Second: you need to create a new Service Group Screen click (NEW).

Set it up for regular service i e, Monthly, Bi- Monthly etc. Make sure you change the Period to Start to the month the regular service is to begin for 2014 then click on schedule. Example 01/2014, 02/2014. When invoices are created in 2014 the customer invoice will create as they are do for service.



Next, make sure in December you click on the box 12 and change one (1) to a (2)

This will create a invoice in December 2014.This applies to regular service only

\*\*\*Note: Customers who started a regular pest program in December 2013 you might want to run a Start Report for December to make sure in the Schedule box it has the number one (1) so it doesn't create 2 invoices in December of the new year.

The screenshot shows the 'Service Group' window with the following details:

- Service ID:** 8114266 (Page 2 of 2)
- Service Type:** BP (BURNING BUSH)
- Initial Price:** 0.00 (Done)
- Initial Rate:** 65.00 (Initial Annual: .00)
- Frequency:** M11 (Monthly)
- Schedule Option:** In Day Of The Month (1st of the Month)
- Time:** 07 (Morning 8:00 AM)
- Technician:** JIS (JERRY JONES)
- Calendar:** 11/13/12 (Calendar view showing a grid with dates 1 through 12, and a 'Schedule' button circled in red)
- Buttons:** Print, Save, Cancel, Delete, Add, Edit

**Last step: In January 2014 when you are back from the holidays MAKE sure you Create Invoice (Batch). This will create invoices for new customers starting their service in January**

You can go to <http://www.akcomp.com> click on menu Support and watch the video for New Year Scheduling 2013 this procedure is the same for scheduling 2014.