

# WHERE DID MY PAGE GO?

Location in Version 8.0			New Location			
Module	Tab	Page	Menu	Option	Section	Link
P3 - Flat Rate Module	Dealer Tab	Core Info			MULTIPLE PLACES - Click here to view the mapping for each individual field.	
P3 - Flat Rate Module	Dealer Tab	Flat Rate Settings			MULTIPLE PLACES - Click here to view the mapping for each individual field.	
P3 - Flat Rate Module	Dealer Tab	Invoice Settings			MULTIPLE PLACES - Click here to view the mapping for each individual field.	
P3 - Flat Rate Module	Dealer Tab	Diagnostic Fee	Left Menu	Settings	Invoice Settings	Diagnostic Fees
P3 - Flat Rate Module	Dealer Tab	Service Agreement	Left Menu	Settings	Service Agreements	Service Agreements
P3 - Flat Rate Module	Dealer Tab	Coupon	Left Menu	Settings	Invoice Settings	Coupons
P3 - Flat Rate Module	Dealer Tab	Sales Tax	Left Menu	Settings	Sales Tax	Sales Tax Codes
P3 - Flat Rate Module	Dealer Tab	Export Dealer Data	Left Menu	Settings	Company Settings	Export Dealer Data
P3 - Flat Rate Module	Dealer Tab	Email Settings	Left Menu	Settings	Email/Text Communications	Email-SMS General Settings
P3 - Flat Rate Module	Dealer Tab	Text Settings	Left Menu	Settings	Email/Text Communications	Email-SMS General Settings
P3 - Flat Rate Module	Dealer Tab	Invoice Accreditation	Left Menu	Settings	Invoice Settings	Invoice Accreditations
P3 - Flat Rate Module	Repair Category Tab		Left Menu	Settings	Flat Rate Settings	Repair Category
P3 - Flat Rate Module	Repair Details Tab		Left Menu	Settings	Flat Rate Settings	Repair Details
P3 - Flat Rate Module	Repair Tab		Left Menu	Settings	Flat Rate Settings	Repair
P3 - Flat Rate Module	Repair Task Tab		Left Menu	Settings	Flat Rate Settings	Repair Task
P3 - Flat Rate Module	Part Tab		Left Menu	Settings	Flat Rate Settings	Part
P3 - Flat Rate Module	Part Markup Tab		Left Menu	Settings	Flat Rate Settings	Part Markup
P3 - Flat Rate Module	Print Book Tab		Left Menu	Settings	Flat Rate Settings	Print Book
P3 - Flat Rate Module	User Tab		Left Menu	Settings	User Settings	Admin Users
P3 - Flat Rate Module	Help Tab		Top Menu		Shortcuts	Help Text Icon
P3 - iPad/Tablet Module	Technician Tab		Left Menu	Settings	User Settings	Technicians
P3 - iPad/Tablet Module	Support Materials Tab		Left Menu	Settings	Flat Rate Settings	Support Materials
P3 - iPad/Tablet Module	Files Tab	Folders	Left Menu	Settings	Company Settings	Folders
P3 - iPad/Tablet Module	Files Tab	Files	Left Menu	Settings	Company Settings	Files
P3 - iPad/Tablet Module	Welcome Message Tab		Left Menu	Settings	Company Settings	Tablet Welcome Message
P3 - iPad/Tablet Module	Export Data Tab		Top Menu		Shortcuts	Export Button
P3 - Customer Module	Customer Tab	Customer List	Top Menu	Action Button	Customer	Find Customer (also available as shortcut)
P3 - Customer Module	Customer Tab	New Customer	Top Menu	Action Button	Customer	Create Customer (also available as shortcut)
P3 - Customer Module	Customer Tab	Customer Type	Left Menu	Settings	Customer Settings	Customer Type
P3 - Customer Module	Customer Tab	Person Type	Left Menu	Settings	Customer Settings	Person Type
P3 - Customer Module	Customer Tab	Merge Customer	Top Menu	Action Button	Customer	Merge Customer (also available as shortcut)
P3 - Customer Module	Customer Tab	Merge Customer Location	Top Menu	Action Button	Customer	Merge Customer Location (also available as shortcut)
P3 - Customer Module	Customer Tab	Billing Terms	Top Menu	Action Button	Invoice Settings	Billing Terms
P3 - Customer Module	Data Import Tab	Import Customer	Left Menu	Settings	Data Import	Import Customer
P3 - Customer Module	Data Import Tab	Import Customer Location	Left Menu	Settings	Data Import	Import Customer Location
P3 - Customer Module	Data Import Tab	Import Service Agreement	Left Menu	Settings	Data Import	Import Service Agreement
P3 - Customer Module	Data Import Tab	Import Equipment	Left Menu	Settings	Data Import	Import Equipment
P3 - Customer Module	Data Import Tab	Import Service Call	Left Menu	Settings	Data Import	Import Service Call
P3 - Customer Module	Data Import Tab	Sales Tax Import	Left Menu	Settings	Data Import	Sales Tax Import
P3 - Customer Module	Data Import Tab	Import QB Sales Tax Group				
P3 - Customer Module	Appointments Tab		Top Menu	Action Button	Dispatching	Go to Calendar (also available as shortcut)
P3 - Customer Module	Appointment Settings Tab	Lead Source	Left Menu	Settings	Dispatching Settings	Lead Sources
P3 - Customer Module	Appointment Settings Tab	Phase Code	Left Menu	Settings	Dispatching Settings	Phase Codes
P3 - Customer Module	Appointment Settings Tab	Service Call Type	Left Menu	Settings	Dispatching Settings	Service Call Type
P3 - Customer Module	Appointment Settings Tab	Service Call Status	Left Menu	Settings	Dispatching Settings	Service Call Status
P3 - Customer Module	Appointment Settings Tab	Pre-Survey Categories	Left Menu	Settings	Dispatching Settings	Pre-Survey Categories
P3 - Customer Module	Appointment Settings Tab	Pre-Survey Questions	Left Menu	Settings	Dispatching Settings	Pre-Survey Questions
P3 - Customer Module	Appointment Settings Tab	Working Hours	Left Menu	Settings	Dispatching Settings	Working Hours
P3 - Customer Module	Appointment Settings Tab	Arrival Window	Left Menu	Settings	Dispatching Settings	Arrival Window
P3 - Customer Module	Appointment Settings Tab	Other Settings			MULTIPLE PLACES - Click here to view the mapping for each individual field.	
P3 - Customer Module	Filter Settings Tab	Filter Sizes	Left Menu	Settings	Air Filters	Filter Sizes
P3 - Customer Module	Filter Settings Tab	Filter Types	Left Menu	Settings	Air Filters	Filter Types
P3 - Customer Module	Email Communications Tab	Repair/Replace Email	Left Menu	Settings	Email/Text Communications	Repair/Replace Email
P3 - Customer Module	Email Communications Tab	Diagnostic Email	Left Menu	Settings	Email/Text Communications	Diagnostic Email
P3 - Customer Module	Email Communications Tab	Invoice Email	Left Menu	Settings	Email/Text Communications	Invoice Email
P3 - Customer Module	Email Communications Tab	Service Call In-Route	Left Menu	Settings	Email/Text Communications	Service Call In-Route
P3 - Customer Module	Email Communications Tab	Tune Up	Left Menu	Settings	Email/Text Communications	Tune Up
P3 - Customer Module	Email Communications Tab	Recurring Email Blasts	Left Menu	Settings	Email/Text Communications	Recurring Email Blasts
P3 - Customer Module	Email Communications Tab	Declined	Left Menu	Settings	Email/Text Communications	Declined
P3 - Customer Module	Email Communications Tab	Support Materials	Left Menu	Settings	Email/Text Communications	Support Materials
P3 - Customer Module	Email Communications Tab	Reminders	Left Menu	Settings	Email/Text Communications	Reminders
P3 - Customer Module	Email Communications Tab	Appointment Confirmation Email	Left Menu	Settings	Email/Text Communications	Appointment Confirmation Email
P3 - Customer Module	Text/SMS Tab	Appointment Confirmation	Left Menu	Settings	Email/Text Communications	Appointment Confirmation Text
P3 - Customer Module	Text/SMS Tab	Appointment Reminder	Left Menu	Settings	Email/Text Communications	Appointment Reminder Text
P3 - Customer Module	Text/SMS Tab	Diagnostic	Left Menu	Settings	Email/Text Communications	Diagnostic Text
P3 - Customer Module	Text/SMS Tab	Invoice	Left Menu	Settings	Email/Text Communications	Invoice Text
P3 - Customer Module	Text/SMS Tab	In-Route Confirmation	Left Menu	Settings	Email/Text Communications	In-Route Confirmation Text

# WHERE DID MY PAGE GO?

Location in Version 8.0			New Location			
Module	Tab	Page	Menu	Option	Section	Link
P3 - Customer Module	Terms and Conditions Tab	Work Authorization	Left Menu	Settings	Terms & Conditions	Work Authorization
P3 - Customer Module	Terms and Conditions Tab	Work Completed	Left Menu	Settings	Terms & Conditions	Work Completed
P3 - Customer Module	Terms and Conditions Tab	Credit Card	Left Menu	Settings	Terms & Conditions	Credit Card Authorization
P3 - Customer Module	Terms and Conditions Tab	Service Agreement	Left Menu	Settings	Terms & Conditions	Service Agreement
P3 - Customer Module	Report Tab	Dashboard	Left Menu	Reports	Dashboard	Basic (also available as shortcut)
P3 - Customer Module	Report Tab	Invoice - Invoice Report	Left Menu	Reports	Invoice	Invoice (also available as shortcut)
P3 - Customer Module	Report Tab	Invoice - Overdue Invoice Report	Left Menu	Reports	Invoice	Overdue Invoice Report
P3 - Customer Module	Report Tab	Invoice - Payment Report	Left Menu	Reports	Invoice	Payment Report
P3 - Customer Module	Report Tab	Service Agreement - Service Agreement Report	Left Menu	Service Agreement	Service Agreement	Service Agreement
P3 - Customer Module	Report Tab	Service Agreement - Service Agreement Dashboard Report	Left Menu	Service Agreement	Service Agreement	Service Agreement Dashboard
P3 - Customer Module	Report Tab	Service Calls - Service Calls Report	Left Menu	Reports	Service Calls	Service Calls
P3 - Customer Module	Report Tab	Service Calls - Job Cost Report	Left Menu	Reports	Service Calls	Job Cost
P3 - Customer Module	Report Tab	Service Calls - Diagnostic Pipeline Report	Left Menu	Reports	Service Calls	Diagnostic Pipeline
P3 - Customer Module	Report Tab	Service Calls - Diagnostic Conversion Report	Left Menu	Reports	Service Calls	Diagnostic Conversion Rate
P3 - Customer Module	Report Tab	Technician - Tech Utilization Report	Left Menu	Reports	Technician	Tech Utilization Report
P3 - Customer Module	Report Tab	Technician - Technician Report	Left Menu	Reports	Technician	Technician Report
P3 - Customer Module	Report Tab	Technician - Timesheet Report	Left Menu	Reports	Technician	Timesheet Report
P3 - Customer Module	Report Tab	Customer - Customer Report	Left Menu	Reports	Customer	Customer Report
P3 - Customer Module	Report Tab	Customer - Equipment Report	Left Menu	Reports	Customer	Equipment Report
P3 - Customer Module	Report Tab	Air Filter Program - Filter Order Report	Left Menu	Reports	Air Filter Program	Filter Order Report
P3 - Customer Module	Report Tab	Air Filter Program - Filter Size Summary Report	Left Menu	Reports	Air Filter Program	Filter Size Summary Report
P3 - Customer Module	Report Tab	Filter Report - Bulk Order Report	Left Menu	Reports	Filter Report	Bulk Order Report
P3 - Customer Module	Report Tab	Filter Report - Filter Delivery Report	Left Menu	Reports	Filter Report	Filter Delivery Report
P3 - Customer Module	Report Tab	Email/Text - Upcoming Email Report	Left Menu	Reports	Email/Text	Upcoming Email Report
P3 - Customer Module	Report Tab	Email/Text - Email Log Report	Left Menu	Reports	Email/Text	Email Log Report
P3 - Customer Module	Report Tab	Email/Text - Text Log Report	Left Menu	Reports	Email/Text	Text Log Report
P3 - Diagnostic Module	Equipment Type Tab		Left Menu	Settings	Equipment/Diagnostic	Equipment Type
P3 - Diagnostic Module	Checklist Tab		Left Menu	Settings	Equipment/Diagnostic	Diagnostic Checklists
P3 - Diagnostic Module	Component Tab		Left Menu	Settings	Equipment/Diagnostic	Diagnostic Components
P3 - QuickBooks Module	QB Desktop (IIF) Tab	Data Settings				
P3 - QuickBooks Module	QB Desktop (IIF) Tab	Sync	Top Menu	Action Button	QuickBooks	Sync QB Desktop
P3 - QuickBooks Module	QB Desktop (IIF) Tab	Reset	Top Menu	Action Button	QuickBooks	Reset QB Desktop
P3 - QuickBooks Module	QB Settings Tab	Income Account	Left Menu	Settings	QuickBooks	Income Account
P3 - QuickBooks Module	QB Settings Tab	Repair Task	Left Menu	Settings	QuickBooks	Repair Task
P3 - QuickBooks Module	QBO Tab		Top Menu	Action Button	QuickBooks	Sync QBO
ESM Module	Setup Menu Option	Company Profile	Left Menu	Settings	ESM Setup	Company Profile
ESM Module	Setup Menu Option	Proposal Label	Left Menu	Settings	ESM Setup	Proposal Label
ESM Module	Setup Menu Option	Brand/Series	Left Menu	Settings	ESM Setup	Brand/Series
ESM Module	Setup Menu Option	Margins	Left Menu	Settings	ESM Setup	Margins
ESM Module	Setup Menu Option	Installations Details	Left Menu	Settings	ESM Setup	Installations Details
ESM Module	Setup Menu Option	Equipment & Installation Costs	Left Menu	Settings	ESM Setup	Equipment & Installation Costs
ESM Module	Setup Menu Option	Customer Survey	Left Menu	Settings	ESM Setup	Customer Survey
ESM Module	Setup Menu Option	Financing	Left Menu	Settings	ESM Setup	Financing
ESM Module	Setup Menu Option	Coupons/Rebates	Left Menu	Settings	ESM Setup	Coupons/Rebates
ESM Module	Setup Menu Option	Technician Setup	Left Menu	Settings	ESM Setup	Technician Setup
ESM Module	Setup Menu Option	Finish			REMOVED - No Longer Needed	
ESM Module	Sales Menu Option	Create New	Top Menu	Action Button	ESM	Create ESM Proposal
ESM Module	Sales Menu Option	View All	Left Menu	Reports	ESM	View All
ESM Module	Sales Menu Option	View Open	Left Menu	Reports	ESM	View Closed
ESM Module	Sales Menu Option	View Closed	Left Menu	Reports	ESM	View Open
ESM Module	Equipment Menu Option	Equipment	Left Menu	Settings	ESM Equipment	Equipment
ESM Module	Equipment Menu Option	Complete System	Left Menu	Settings	ESM Equipment	Complete Systems
ESM Module	Equipment Menu Option	Pre-Defined Complete Systems	Left Menu	Settings	ESM Equipment	Pre-Defined Complete Systems
ESM Module	Settings Menu Option	Series	Left Menu	Settings	ESM Settings	View System Series
ESM Module	Settings Menu Option	Material	Left Menu	Settings	ESM Settings	Manage Install Materials
ESM Module	Settings Menu Option	Rebate	Left Menu	Settings	ESM Setup	Coupons/Rebates
ESM Module	Settings Menu Option	Add Ons	Left Menu	Settings	ESM Setup	Customer Survey
ESM Module	Settings Menu Option	Cayan Credentials			REMOVED - No Longer Needed	
ESM Module	Settings Menu Option	Change Password			REMOVED - No Longer Needed	
ESM Module	Settings Menu Option	Proposal Settings	Left Menu	Settings	ESM Settings	General Settings