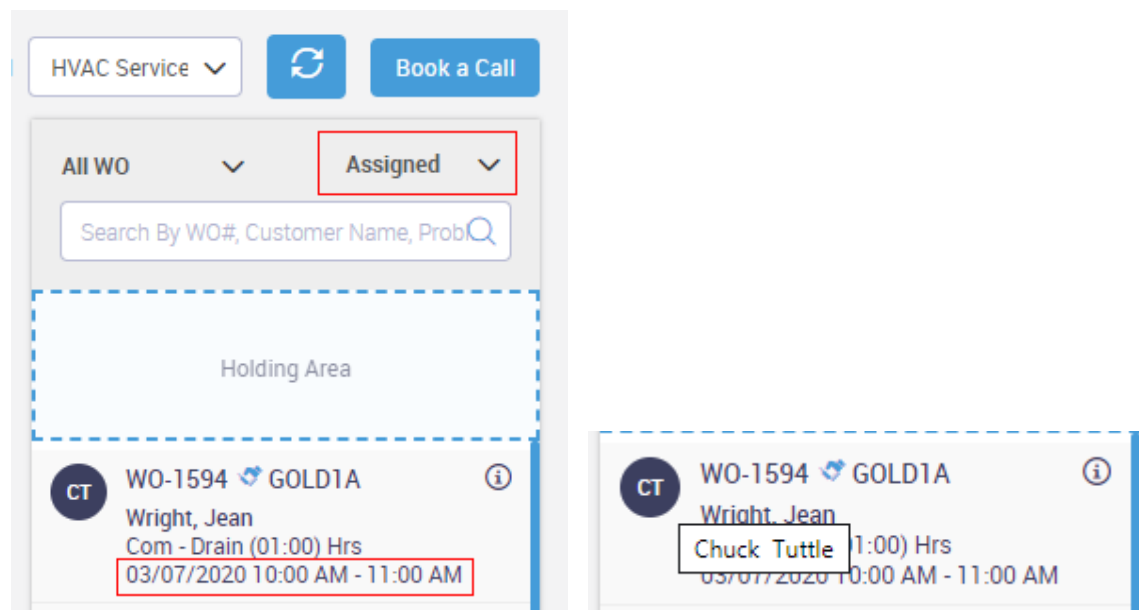


# SF Release Notes: March 5, 2020

## Dispatch Board – “Assigned” drop down now shows the Scheduled Date/Time

When you select the “Assigned” drop down on the right hand side of the ServiceFactor Dispatch Board, you will now see the Scheduled Date and Time of the call, as opposed to the “Promised” time. This will make it easier to find the call on the dispatch board. NOTE – If you are viewing the “Unassigned” calls, the date and time shown will be the “Promised” date and time, since the call is not scheduled.

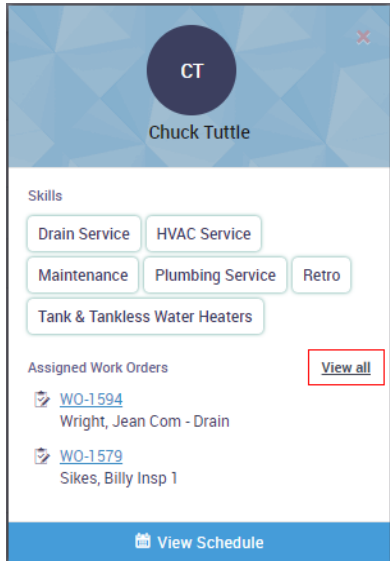
**Helpful Tip** – If you hover your mouse over the technician’s picture or initials in the circle to the left of the call information, it will show you the name of the technician to whom the call is assigned.



## Dispatch Board – “View All” option will show you all Work Orders assigned to a particular technician

If you want to see all of the calls that have been assigned to a particular technician, you can click on the technicians name on the Dispatch Board and click the “View All” link in the screen that pops up. This will list all of the calls that have been assigned to that technician in a grid at the bottom of the Dispatch Board. Don’t forget to scroll down to see additional work orders.

**Helpful Tip** – Clicking the “View Schedule” at the bottom of the popup will allow you to view all technicians scheduled work times and clicking on a particular date for a technician will open a screen allowing you to change that particular technician’s start and end times for the date, and will also allow you to mark that technician as being “On Call”.



Showing Assignments of Chuck Tuttle

All Work Orders **Assigned** Unassigned Completed Posted Canceled Search By WO#, Customer ...

WO #	Customer Name	Promised Appointment	Created Date	Task and Duration	Scheduled Date
WO-1555	Alan, Bill	03/03/2020 02:00 PM - 04:00 PM	03/03/2020 04:51 PM	Res - No Heat (01:30) Hrs	03/03/2020
WO-1471	Alco, Jonathan	02/14/2020 12:00 PM - 02:00 PM	02/14/2020 04:23 PM	Res - No Cool (02:00) Hrs	02/14/2020

## Invoice – Post Invoice Permission

A new permission has been added to ServiceFactor to allow you to restrict the ability for certain employees to be able to post invoices. By default, employees will not be able to post invoices, so you will need to turn the ability on for existing employees. To give permission to Post Invoices, bring up the employee to whom you want to give permission in the Employee File and turn the “Allow to Post Invoices” slider on. This slider is located in the “Office Accessibility” section.

OFFICE ACCESSIBILITY  YES

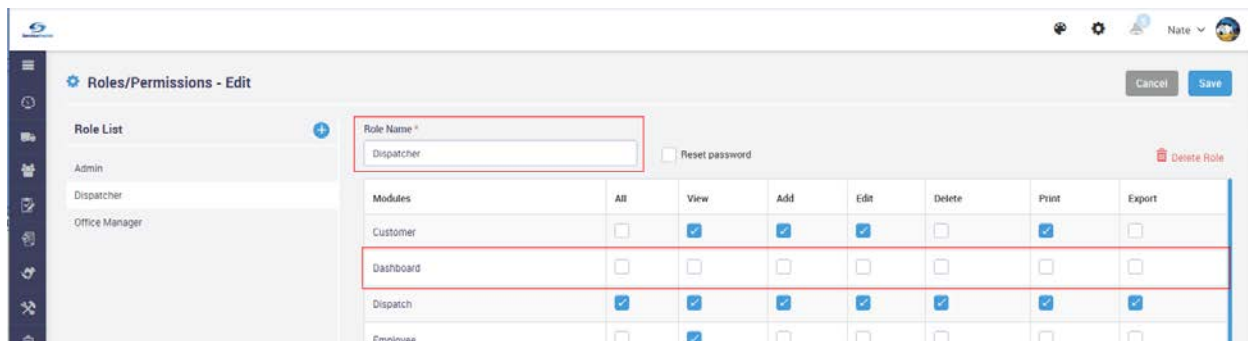
Default Dispatch Board Dispatch Board

HVAC Service HVAC Service × All Service ×

Include in leaderboard  YES Include in Chat  NO Allow to Post Invoices  YES

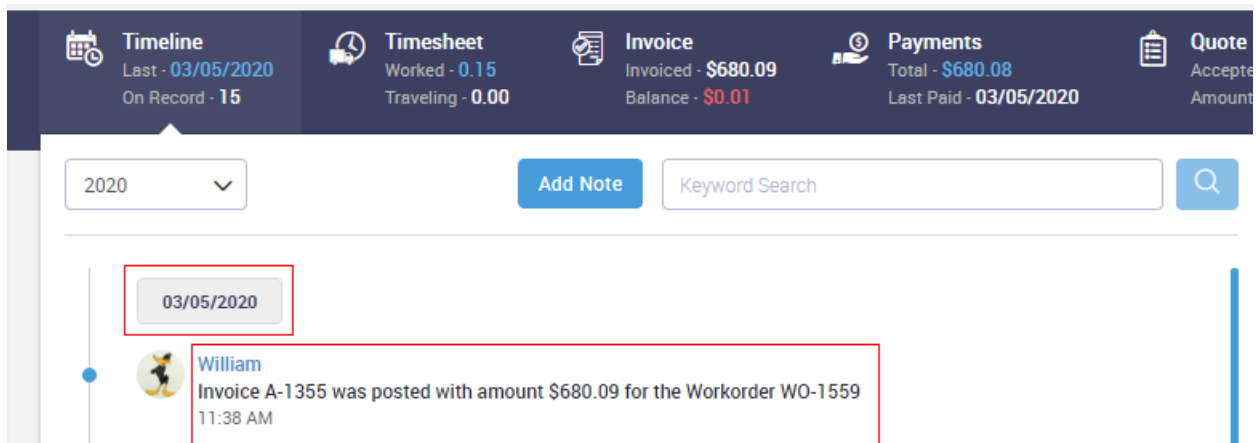
## Dashboard Permissions

You now have the ability to restrict employees from being able to see the Dashboard. If you take away the Dashboard Permission for an employee, they will automatically go to the Dispatch Board when they login, as long as they have permission for the Dispatch Board. To assign permission for the Dashboard, go to “Settings” and choose “Roles and Permissions”. Choose the “Role” for which you want to adjust Dashboard permission and put the appropriate Check Mark answer in the “All” check box for the “Dashboard”. A check mark will allow that role to access the Dashboard. Leaving the check mark blank will not allow the role to access the Dashboard. Be sure to assign the appropriate “Roles” to the proper employees in the Employee file.



## Work Order Timeline – Now records who and when an invoice is posted

When you post an invoice, the system will now record who posted it, date and time it was posted, and the amount for which it was posted. This information will be recorded each time an invoice is posted, so if it is posted more than once, you will see the amount that was posted each time, as well as who did it.



## Service Agreements – Maintenance Schedule Screen – You can now change the Problem Code per inspection

In the Service Agreements Maintenance Schedule Screen, you can now change the problem code per inspection from the default problem code that was entered in the General Screen. This is useful if you do different kinds of work per inspection. For example, you may provide 4 inspections per year, of which 2 are full inspections and 2 are for filter changes only. By assigning an appropriate problem code, you can easily see what type of work needs to be done when looking at the work order.

Inspection schedule ✔ Deferred

Confirmation	WO #	Problem Code	Equipment	Schedule date	Next Date	Non Billable		
<input checked="" type="checkbox"/>	WO-1590	Insp 1	Search and select	03/01/2020	06/01/2020	FLT2020 Search and select	0.00	Skip
<input checked="" type="checkbox"/>		Filter Change	Search and select	06/01/2020	09/01/2020	FLT2020 Search and select	0.00	Skip
<input checked="" type="checkbox"/>		Insp 1	Search and select	09/01/2020	12/01/2020	FLT2020 Search and select	0.00	Skip
<input checked="" type="checkbox"/>		Filter Change	Search and select	12/01/2020		FLT2020 Search and select	0.00	Skip

## Customer Mailing Labels – “No Service Since” filter has been added

When generating “Customer Mailing Labels” from the Customer Report Menu, a new filter has been added titled “No Service Since”. If you enter a date in this field, the system will generate mailing labels for any customers that have not had service after the date entered. So if you want to market to customers that have not had service since a specific date, use this field.

**Helpful Tip** – The mailing labels can be printed to Avery 5160 labels or exported to Excel.

**No Service Since**

09/01/2019

**Customer Mailing Labels**

Jennifer Anderson 6368 Cocos Drive Fort Myers, FL 33908	Steve Armstrong 5862 Inverness Circle Fort Myers, FL 33903	Cindy Baker 5250 Cocos Drive Fort Myers, FL 33908
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