

SF Release Notes: March 30, 2020

Dispatch Board – Zones now display on the Dispatch Board

Zones were added to ServiceFactor several months ago, but they will now be displayed on the Dispatch Board, so that you can instantly see what zone a work order is located. You will notice on the scheduled calls, there is a colored line between the 2 lines of data. The color represents a specific zone. A new “Toggle” button has also been added to the Dispatch Board so that you can toggle the second line of data to temporarily show you the Zone Name. **NOTE** - By default the Problem Code will now be the default field displayed as the second line.

You will also notice that the cards in the column on the right and in the Holding Cell also display the zone color

The color coding is designed to easily see what techs are working in a particular zone to assist the dispatcher with keeping a technician in a particular area for the day. The zone colors also appear on the Weekly Dispatch Schedule.

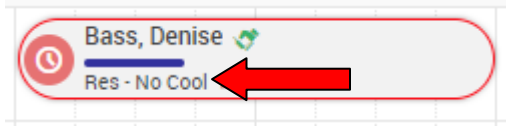
Helpful Tip: If you hover your mouse over the zone color, a tool tip will appear showing you the zone name. Notice the tool tip “North FM” below the call for Sanders, Bonnie.

The screenshot displays the ServiceFactor Dispatch Board interface. At the top, it shows the date 'March 23, 2020, Mon' and a 'Toggle' button. The main area is a grid with technicians listed on the left (Bobby, Brett, Chuck Tu..., Drew, James, James Cr..., Nate) and time slots from 8 AM to 4 PM. Work orders are assigned to technicians, with colored bars indicating the zone. For example, Sanders, Bonnie is assigned a work order in the 10 AM slot, with a tooltip showing 'North FM'. A red arrow points to the tooltip. On the right side, there is a list of work orders, including 'WO-1695 Gateway Property Management JC - Replacement (8-0) Hrs' and 'WO-1689 GOLD2A Sanders, Bonnie Res - No Cool (2.0) Hrs'. A search bar and 'Book a Call' button are also visible.

Dispatch Board – Bottom line of the Dispatch Card now shows the Problem Code by default

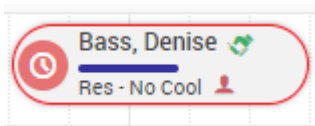
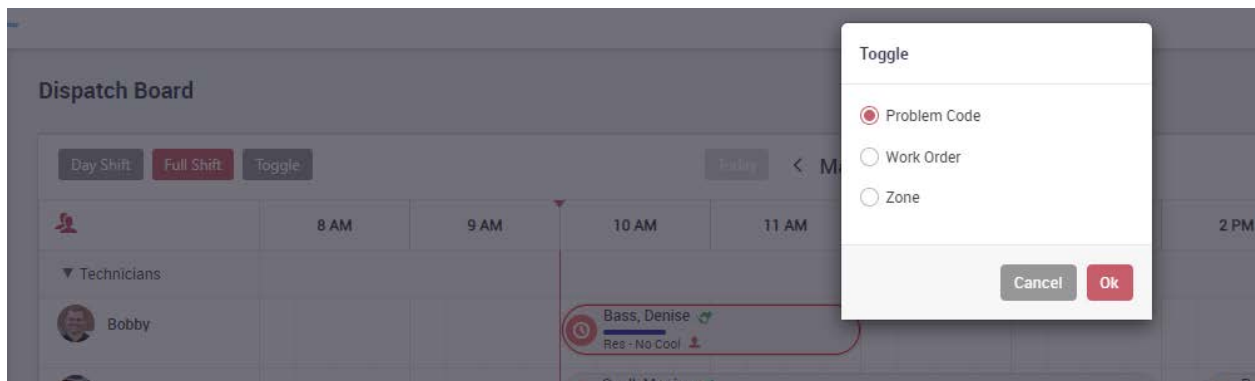
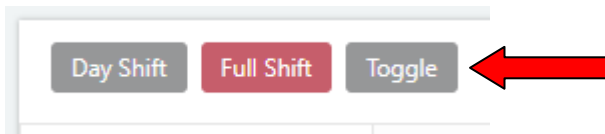
The bottom line of the Dispatch Card now shows the problem code associated with the work order by default. This allows the dispatcher to instantly see what kind of call is assigned to the technicians without having to drill into the Work Order Summary screen. By using the new

“Toggle Button” at the top of the Dispatch Board, you can temporarily change the data displayed on the bottom line to Work Order Number or Zone Name, but when you leave the Dispatch Board and come back, it will default back to the Problem Code.



Dispatch Board – You can now temporarily toggle the data that appears on the Bottom Line of the Dispatch Card.

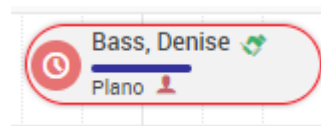
A new “Toggle” button has been added to the top of the Dispatch Board. This toggle button will allow you to temporarily change the bottom line of the Dispatch Card from displaying the Problem Code to display either the “Zone Name” or “Work Order Number”. To temporarily change the bottom line display, click the “Toggle” button at the top of the Dispatch Board and select the option you would like to view. NOTE – Once you leave the Dispatch Board and go back into it, the Problem Code will once again be displayed.



Problem Code Displayed



Work Order # Displayed

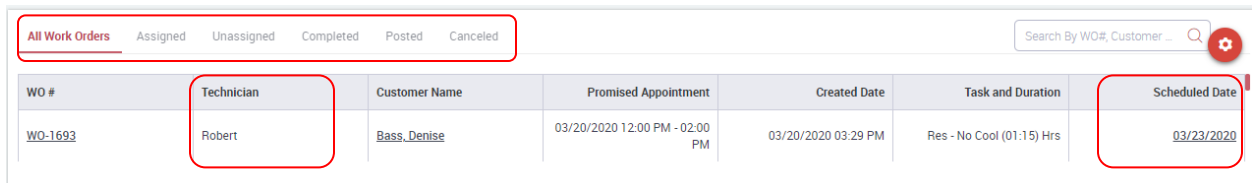


Zone Displayed

Dispatch Board – Bottom Grid now displays the technician scheduled for the call

If you view the grid at the bottom of the dispatch board, it now includes the technician that is assigned to the call.

Helpful Tip: Clicking on the “Scheduled Date” hyperlink will instantly change the Dispatch Board to the date selected. This makes it quick and convenient for locating the scheduled call. If looking for a particular call, use the Search field at the top right hand side of the grid. Also, please note that there are different tabs at the top of the grid to limit the work orders displayed based on the status of the work order.



The screenshot shows a web interface for a dispatch board. At the top, there are tabs for work order status: "All Work Orders" (highlighted with a red box), "Assigned", "Unassigned", "Completed", "Posted", and "Canceled". To the right of the tabs is a search bar labeled "Search By WO#, Customer ..." and a gear icon. Below the tabs is a table with the following columns: "WO #", "Technician" (highlighted with a red box), "Customer Name", "Promised Appointment", "Created Date", "Task and Duration", and "Scheduled Date" (highlighted with a red box). The table contains one row of data:

WO #	Technician	Customer Name	Promised Appointment	Created Date	Task and Duration	Scheduled Date
WO-1693	Robert	Bass, Denise	03/20/2020 12:00 PM - 02:00 PM	03/20/2020 03:29 PM	Res - No Cool (01:15) Hrs	03/23/2020

Dispatch Board – Ability to easily Reassign the Primary Technician

If you are using ServiceFactor Mobile, the Primary Technician is the technician that can add items to the work order, capture the customer’s signature and complete the invoice. Secondary technicians can view the call information, enter their dispatch times and enter any equipment. Typically the Primary Technician is the first technician to whom you assign the call. If you only have the call assigned to one technician, and you re-assign the call to a different technician by dragging and dropping it on the dispatch board, the new technician automatically becomes the primary technician. However, if you have more than one technician assigned to the call and you want to change the primary from Tech A to Tech B, you can now click on the call assigned to Tech B and click the “Make as Primary” button. This will change the Primary Technician from Tech A to Tech B. NOTE – Neither technician can be in a Travelling or Working Status in order to reassign the Primary Tech.

If Tech A has already downloaded the Work Order to their Mobile Device and has entered dispatch times and items, the call will need to be synced back to the office prior to being able to change the primary technician to Tech B. In this situation, you would have Tech A fill out the items used on the Items Screen in their Mobile Device and change their Dispatch Status to “Incomplete” (or any status other than “Traveling” or “Working”). Once the call is in a different status than “Traveling” or “Working”, you will be able to assign any other technician assigned to the call as the Primary Technician. NOTE – If the tech to whom you are trying to make the Primary Tech is in a “Working” status, you will not be able to make that Tech the Primary Tech until the Tech changes their status to “Paused” (or any status other than “Complete”, “Traveling” or “Working”). In this situation, it is recommended you have the Tech temporarily change their status to “Paused” while the office changes the Primary Tech and then have the tech change their status back to “Working”. This will pull any items that were added to the work order from the original Primary Tech and allow the new Primary Tech to add items, complete the invoice, etc.

NOTE – The technician (Tech B) will need to resync their data in order to get to the Items Screen. This can be done by clicking the Hamburger ICON and selecting the “Sync Data” button or by going back to the Work Order Listing screen and refresh the screen by pulling down the list of calls. Then reselect the work order in order and at that point, they will be able to get to the Items Screen

WO Summary : WO-1693

Bass, Denise
404 Greenfield Lane, Murphy, Texas, 75094
(817) 881-3949 karin@mail.com

WO Details
Copy WO
Make As Primary

Agreements
GOLD1A GOLD2A GOLD3M

Problem Code
Res - No Cool

Scheduled Time
03/23/2020 10:30 AM - 11:45 AM

Call Taken Date/Time
03/20/2020 11:29 AM

Promised Date/Time
03/20/2020 12:00 PM - 02:00 PM

Estimated Time
01:15 hrs

Priority
Emergency

Zone
Plano

Technician(s)

Problem Reported
System is not blowing any air and is frozen with ice

Add Note

Printed Invoice – Will now print the equipment worked on and what items are associated with the piece of equipment

When you print an invoice, it will now print the details of the piece of equipment to which the items are related. The invoice will show the Equipment ID, Brand, Model Number, Serial Number and the Equipment Location in Bold and directly below the Equipment Info line will be the items associated with the Equipment. You will notice that the items associated with the equipment are indented, making it obvious that the items are associated with the equipment.

Bill To Address	Site Address
Saucy Meatball 12401 Commerce Lakes Dr, Fort Myers, FL 33913	Saucy Meatball 12401 Commerce Lakes Dr, Fort Myers, FL 33913

Description	Qty	Price (\$)	Amount (\$)
Equipment ID: AC001 - Trane - M/N: 4TTR6036J - S/N: 858685757 - Side of garage			
Regular Time Labor @ \$150 per hour	2.00	150.00	300.00
1/4 hp 1075 RPM 230V Cond Mtr	1.00	138.38	138.38
7.5 Mfd 370V Premium Capacitor	1.00	31.67	31.67
Equipment ID: AH001 - Trane - M/N: TEM8A0C36 - S/N: 65383743 - Front closet			
20 X 20 X 1 Disposable Filter	2.00	0.00	0.00
Regular Time Labor @ \$150 per hour	0.25	150.00	37.50
Sub Total			\$507.55
Tax (6.5000 %)			\$11.05
Total			\$518.60

NOTE – By default, the system will automatically print the equipment information on the invoice. If you print the invoice from the office, you have an optional slider on the Invoice Screen to NOT show the equipment information. If you do not want to print the Equipment information on the invoice, turn the “Print Equipment” slider to “Off”. Currently, ServiceFactor Mobile will determine whether or not to print the equipment based on the slider in the office. In a future mobile release, the “Print Equipment” slider will be added to ServiceFactor Mobile, but due to the large requests to have equipment print on the invoice, we have set it up to print on the Mobile Invoice automatically.

Timeline Last - 03/23/2020 On Record - 12
Timesheet Worked - 1.47 Traveling - 0.10
Invoice Invoiced - \$518.60 Balance - \$518.60
Payments Total - \$0.00 Last Paid - None
Quote Accepted - None Amount - \$0.00
Purchase Order Amount - \$0.00 LTD - \$0.00

Invoice Email Print Change Status Save

Bill To: Saucy Meatball Profitability Details

Bill To Address: 12401 Commerce Lakes Dr, Fort Myers, Florida, 33913 (239) 707-0243

Terms: Due on receipt Invoice Date: 03/20/2020 Due Date: 03/20/2020

Invoice #: F-1478 Customer PO #: 0 Sales Rep: Markup: Commercial Class: Commercial

Business Entity: Com HVAC Service

Print Equipment
 YES

Invoice Items

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
		Regular Time Labor							<input checked="" type="checkbox"/>

Communication Templates – New communication templates have been added for sending quotes from ServiceFactor Mobile

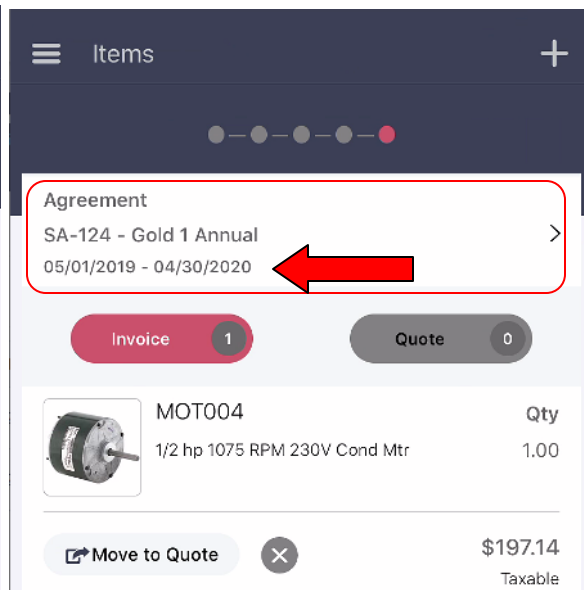
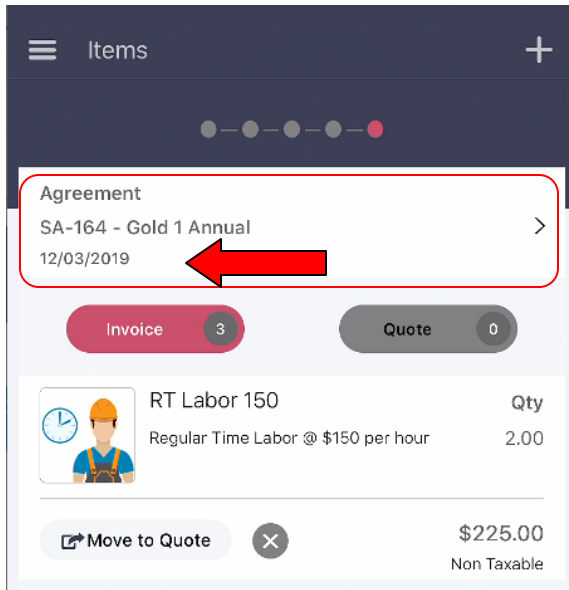
New Communication Templates have been added to the system for sending Quotes from SF Mobile. In the communication Template file, there are now options for setting up a default template for sending a Mobile Quote on its own or sending an Invoice and Quote at the same time. To set up the Mobile Quote Template, go to the Setup and choose Communication Templates under the Company Settings. Click the dropdown and select either “Quote” or “Invoice and Quote” under the Mobile Heading. Fill out the appropriate fields and the Email Body.

When you email a quote from SF Mobile, you will be able to see the Email Body and make any changes to the email text if you desire.

The screenshot shows the 'Company - Communication Templates' configuration page. A dropdown menu for 'Template' is open, with 'Quote Only' selected and highlighted by a red rectangle. The page includes sections for 'Basic Details', 'Exclude Customer Type', 'No of days after the reminder should be sent', 'BCC' (with the email address wmosborn@me.com), and 'Insert Codes' (with options for Customer Displayname, Customer Firstname, and Customer Lastname).

ServiceFactor Mobile – Service Agreement Start and Expiration Dates will now be displayed with the customers Contract Type in the Items Screen

If a customer has a Service Agreement, the contract start and expiration dates will appear in the Agreement Section on the “Items” screen of ServiceFactor Mobile. NOTE – If the Service Agreement is a “Recurring Service Agreement”, the screen will only show the start date of the Service Agreement, and there will not be an end date since the S/A really does not have an expiration date.



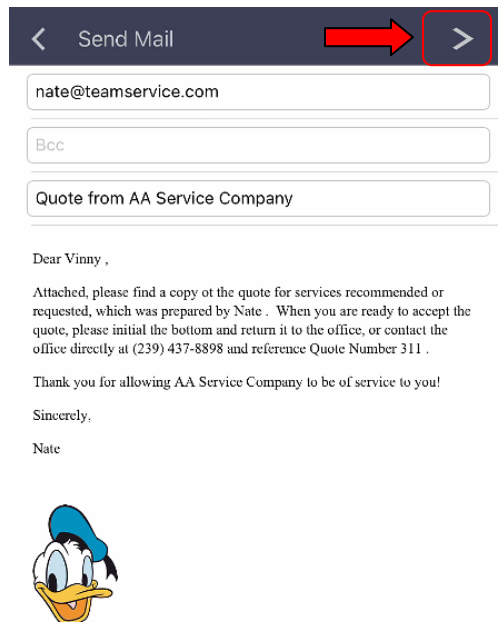
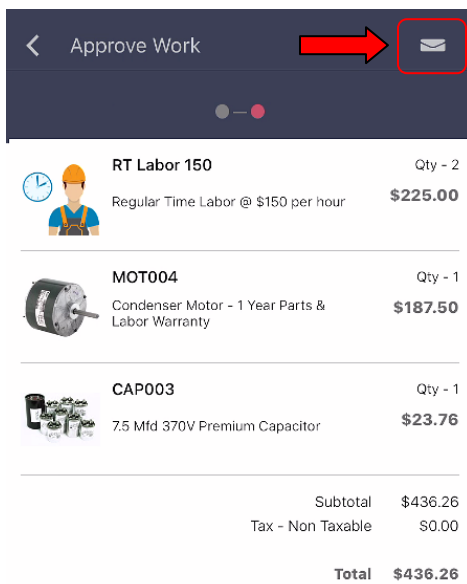
Recurring Service Agrmt (No exp date)

Annual Service Agreement

ServiceFactor Mobile – Ability to Email Quotes from SF Mobile

This release includes the ability to Email a Quote generated in SF Mobile. Prior to this release, you could generate a Quote, but it needed to be printed or emailed from the office.

To email the quote from SF Mobile, click the “View Quote” button at the bottom of the quote and slide to the “Approve Work” screen. Once there, tap the “Envelope” icon at the top of the screen, make any changes necessary and tap the “>” button to send email.



ServiceFactor Mobile – You now have the ability to print Non-Billable Items on the Invoice

This release offers the ability to print the Non-Billable items on the invoice from the field. The “Print” slider is located in the screen that you enter the quantity of items, the equipment the item is to be applied against, etc. By default, the slider will be set to “Yes”, but can be overridden per item.

The screenshot displays a mobile application interface for managing non-billable items. At the top, a dark header bar contains a menu icon, the text "Non-billable Items", and a plus sign. Below this, a secondary header shows a small image icon, the item code "FLT2020", and a "Qty" label. The main content area is a white form with a red close button in the top right corner. The form contains the following fields: "Quantity" with a text input containing "2.00"; "Choose Location" with a dropdown menu showing "Truck 102"; "Equipment" with a dropdown menu showing "AC001"; and "Description" with a text area containing "20 X 20 X 1 Disposable Filter". A "Print" toggle switch is located below the description, highlighted with a red rectangular border, and is currently turned on (green). At the bottom right of the form is a red button labeled "UPDATE".