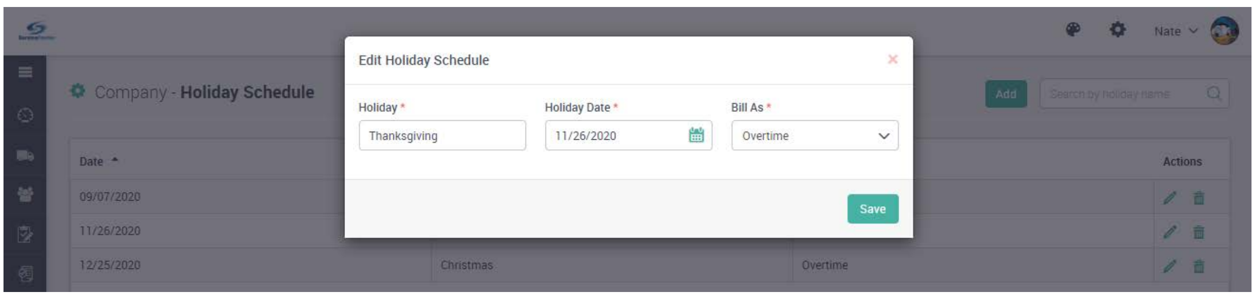
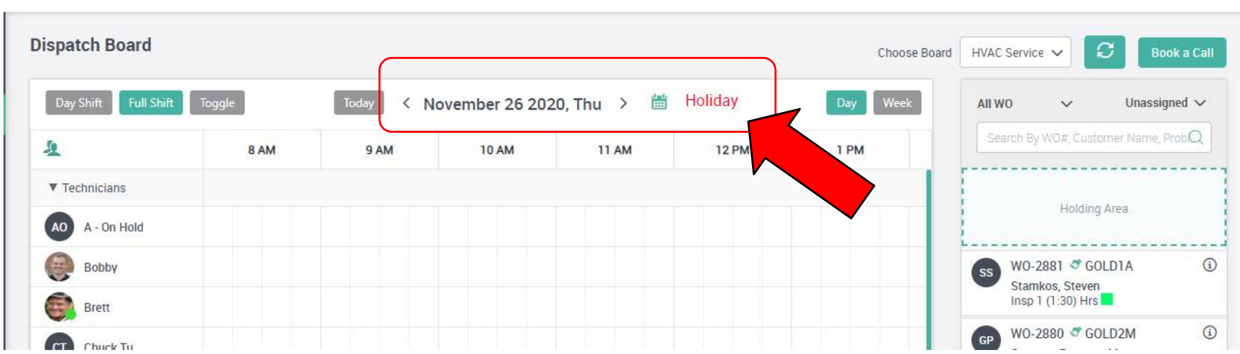
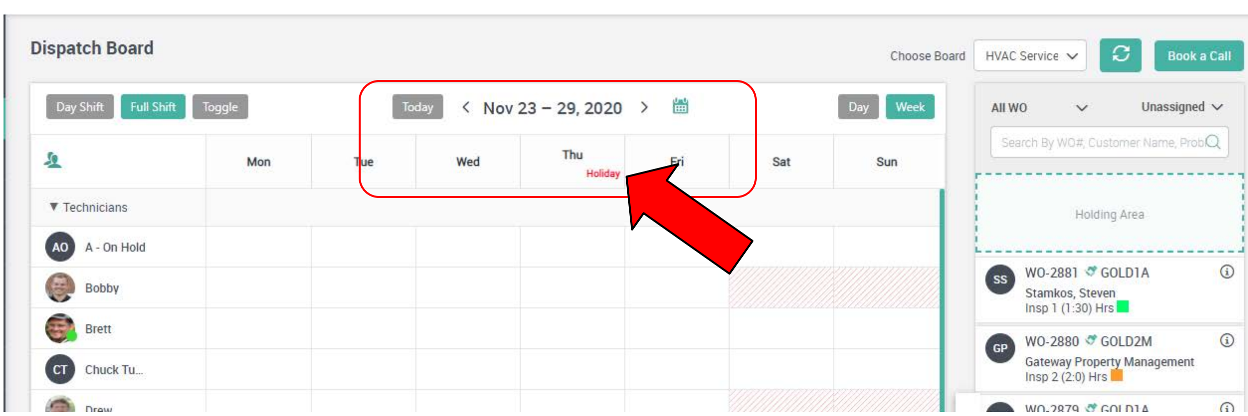
SF Release Notes: October 22, 2020

Holiday Schedule

A new Holiday Schedule has been added to the system that will allow you to define Holidays and if the system should bill for Regular Time or Overtime if you are using Flat Rate Pricing. The Holiday Schedule is accessed in the Settings under the Company Section. When you define a holiday, the word “Holiday” will appear on the Daily and Weekly Dispatch Board on the appropriate date and the system will automatically charge the appropriate Flat Rate price (Regular Time or Overtime) based on what you have selected for the Billing Type.



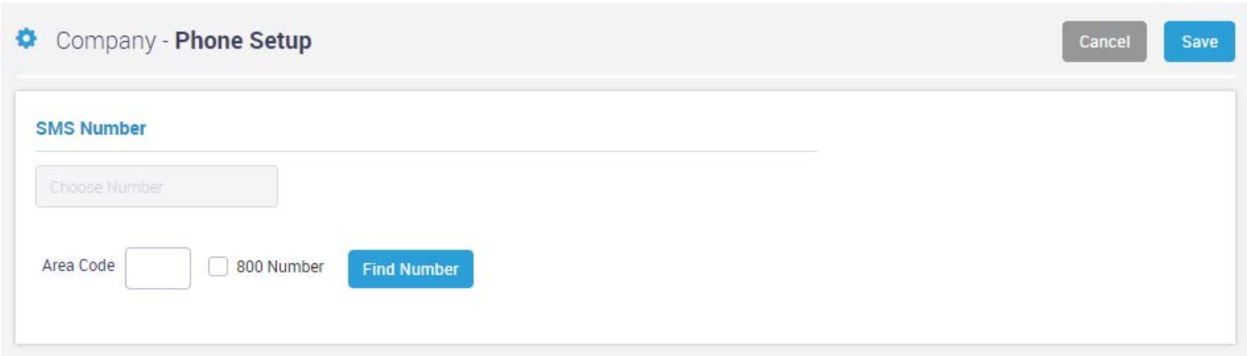


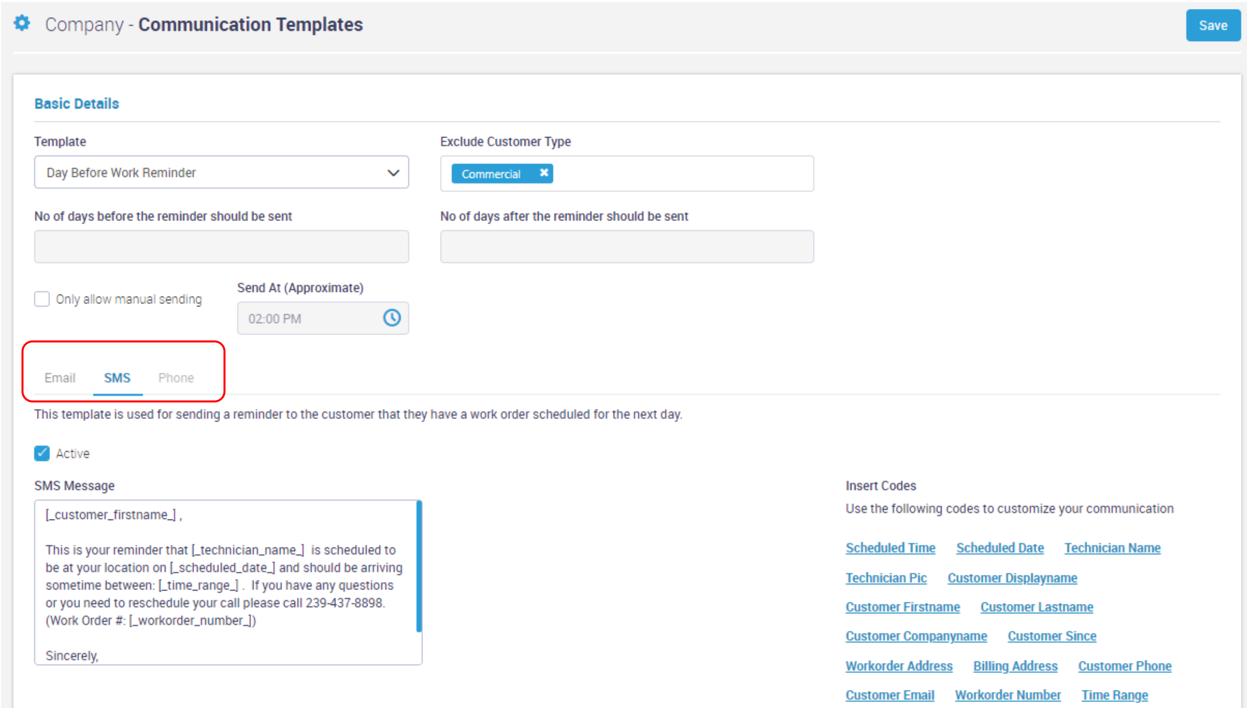


Texting* – SMS Texting Has Been Enabled in the System

Texting has been added to the system that will allow you to text various communication templates to your customers. Currently, the following Communication Templates can be defined to send out text messages. Service Agreement Inspection Reminders, Automatic Credit Card Payment Declines and Scheduled Work Reminders. As with all Communication Templates, you can choose to exclude specific customer types from receiving text messages if applicable. Additional features will be added in the future.

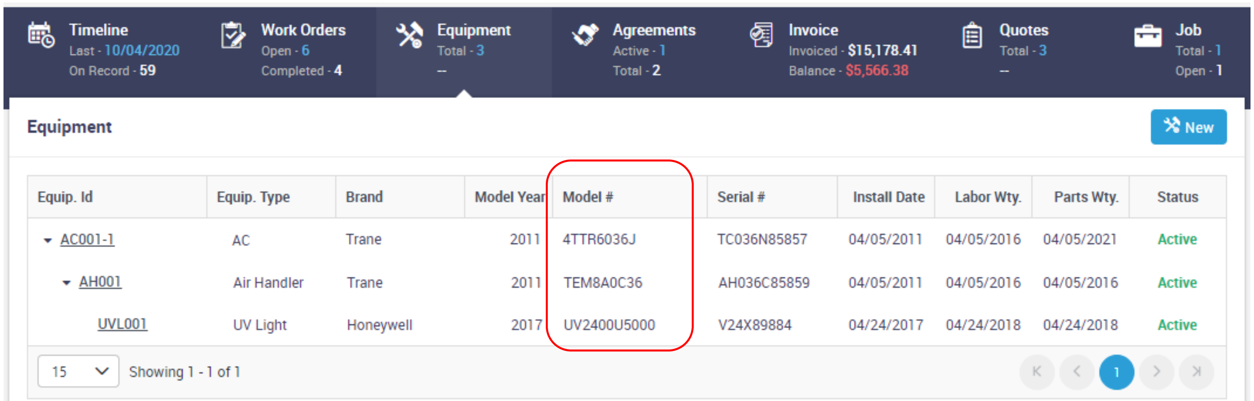
***NOTE –** Texting is sent through Twilio (a third party application) and the charges incurred for both your texting phone number and texts sent will be billed with your monthly ServiceFactor Membership. Please contact ServiceFactor Support if you would like to enable this feature.





Customer Equipment Tab – Model Number column has been added to the screen

The Model Number has been added to the Grid in the Customer Equipment Tab. Prior to this release, you would have to click on the piece of Equipment listed on the bottom left hand side of the screen in order to see the Model Number.



Customer File – Sales Rep field has been added to Customer File

A new Sales Rep field has been added to the Customer File. If you enter a Salesperson in this field, the system will automatically fill in the Salesperson Field with that person when adding a Work Order, a Service Agreement, A Project Management Job or a Quote. If you leave this field blank in the Customer File, the system will work as it always has and you will need to manually fill in the Salesperson field on new records.