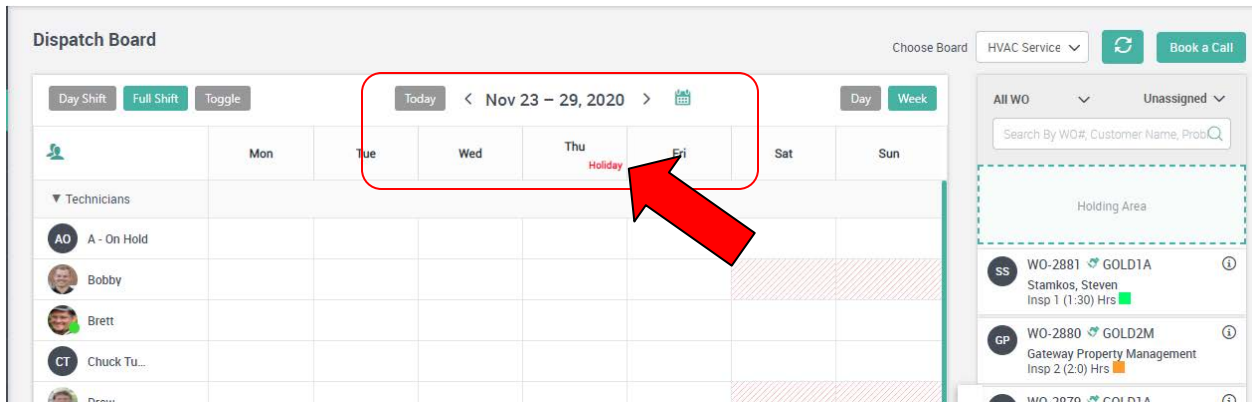
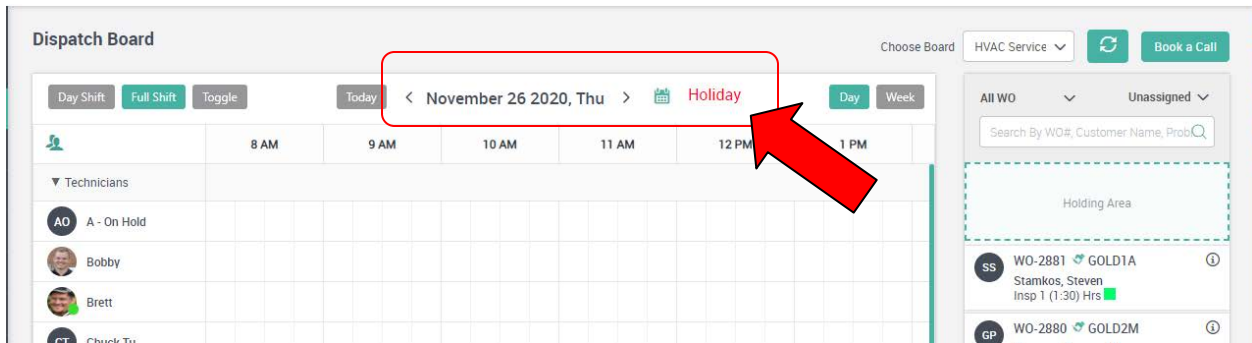
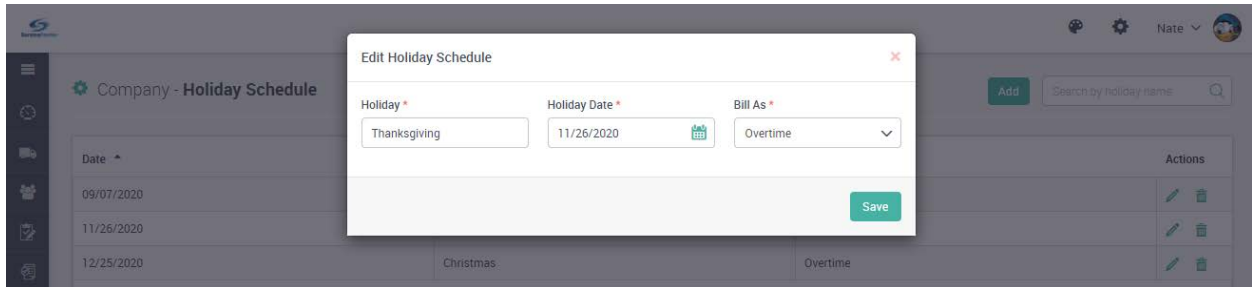


# SF Release Notes: October 22, 2020

## 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.

### Company - Phone Setup

Cancel Save

**SMS Number**

Choose Number

Area Code   800 Number

### Company - Communication Templates

Save

**Basic Details**

Template: Day Before Work Reminder

Exclude Customer Type: Commercial

No of days before the reminder should be sent:

No of days after the reminder should be sent:

Only allow manual sending

Send At (Approximate): 02:00 PM

Email **SMS** Phone

This template is used for sending a reminder to the customer that they have a work order scheduled for the next day.

Active

SMS Message

[\_customer\_firstname\_],

This is your reminder that [\_technician\_name\_] is scheduled to be at your location on [\_scheduled\_date\_] and should be arriving sometime between: [\_time\_range\_]. If you have any questions or you need to reschedule your call please call 239-437-8898. (Work Order #: [\_workorder\_number\_])

Sincerely,

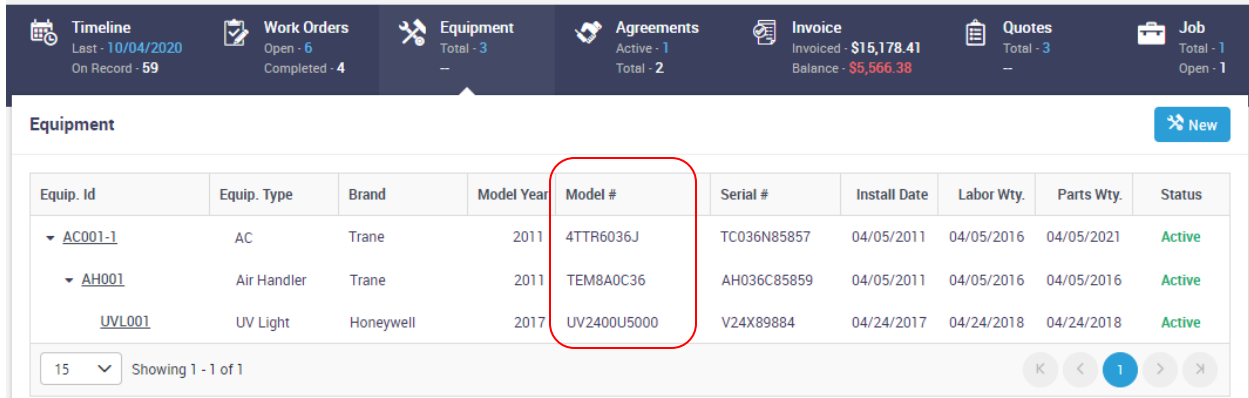
Insert Codes

Use the following codes to customize your communication

[Scheduled Time](#) [Scheduled Date](#) [Technician Name](#)  
[Technician Pic](#) [Customer Displayname](#)  
[Customer Firstname](#) [Customer Lastname](#)  
[Customer Companyname](#) [Customer Since](#)  
[Workorder Address](#) [Billing Address](#) [Customer Phone](#)  
[Customer Email](#) [Workorder Number](#) [Time Range](#)

## 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.

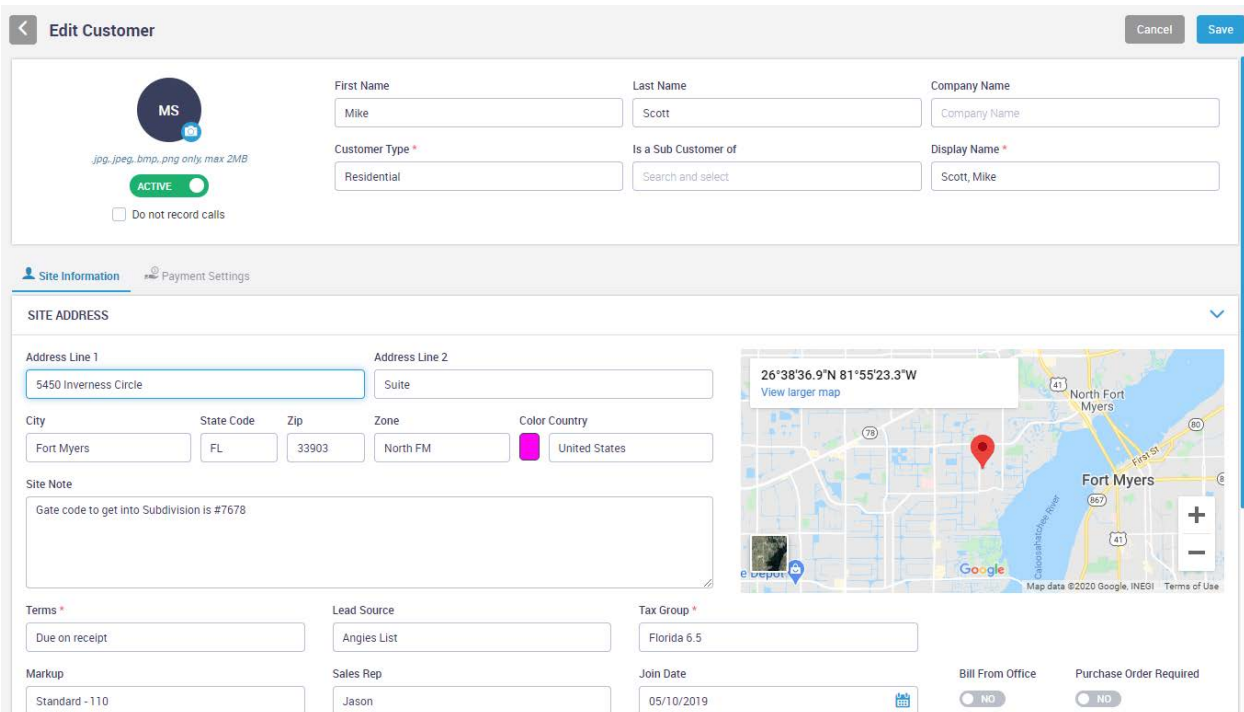


The screenshot shows the 'Equipment' tab in a software interface. At the top, there are navigation icons for Timeline, Work Orders, Equipment, Agreements, Invoice, Quotes, and Job. Below these is a table of equipment records. The 'Model #' column is highlighted with a red box.

Equip. Id	Equip. Type	Brand	Model Year	Model #	Serial #	Install Date	Labor Wty.	Parts Wty.	Status
AC001-1	AC	Trane	2011	4TTR6036J	TC036N85857	04/05/2011	04/05/2016	04/05/2021	Active
AH001	Air Handler	Trane	2011	TEM8A0C36	AH036C85859	04/05/2011	04/05/2016	04/05/2016	Active
UVL001	UV Light	Honeywell	2017	UV2400U5000	V24X89884	04/24/2017	04/24/2018	04/24/2018	Active

## 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.



The screenshot shows the 'Edit Customer' form. It includes fields for First Name, Last Name, Company Name, Customer Type, Is a Sub Customer of, and Display Name. Below these is the 'Site Information' section, which includes 'SITE ADDRESS' with fields for Address Line 1, Address Line 2, City, State Code, Zip, Zone, and Color Country. There is also a 'Site Note' field and a map showing the location. At the bottom, there are fields for Terms, Markup, Lead Source, Sales Rep, Tax Group, Join Date, Bill From Office, and Purchase Order Required.