# SF Release Notes: November 16, 2020

Reports

Scheduled Reports

This release will now allow you to schedule reports to be automatically generated and emailed on a pre-defined schedule. For example, you may want to have a Technician Profitability report emailed to the owner and service manager every Friday Morning between 7:00 AM and 8:00 AM to prepare for a weekly technician meeting. Or you might want a Service Agreement Required Material List for the following month to be sent to you every month on the 25th in order to make sure you have the necessary material for the upcoming month's inspections. Do you have a large project management job that you want to keep close tabs on? Not a problem…you can set up the Project Management History Report to be emailed to you weekly, nightly, every 3 days, etc. Reports can be sent as a PDF or as an Export.
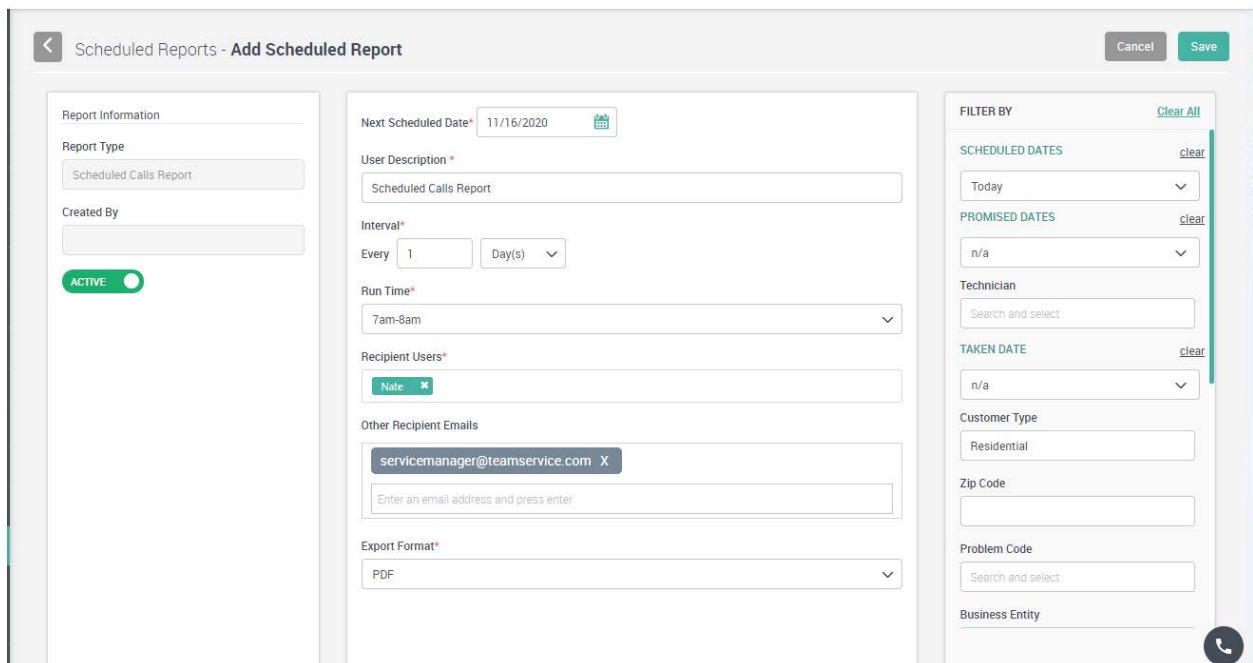
New Reports

Unassigned Calls Report

An Unassigned Calls Report has been added to the Work Orders Report section. This report lists the Work Orders that are unassigned on the Dispatch Board for the selected criteria. The information on the report includes the Work Order #, Site Name, Phone Number, Promised Date and Time, Zone, Site Address, Problem Reported and Estimated Time. Prior to this release, you could print the Unassigned Calls from the Work Order listing, but the new report gives you more filtering options and the export is the same as the "Scheduled Calls Report" if you want to combine them into one spreadsheet.

Work Order Gross Profit per Man Day Report

A new Work Order Gross Profit Per Man Day report has been added to the Work Orders Report section. This report is similar to the Work Order Profitability report, but instead of showing the Average Revenue per Hour, it will show you the Gross Profit per Hour and the Gross Profit per Man Day. Gross Profit per Man Day is calculated by multiplying the Gross Profit per hour times 8, since there are 8 hours in a Man Day. So if the job had a gross profit of $125.00, that would be equivalent to $1,000.00 for a Man Day. **NOTE –** This value is not the amount of profit you had for the day, it is showing what the profit would have been had the job lasted for one man day.

Contract Expiration Report

A new Contract Expiration Report has been added to the Contract Reports section. This report lists Service Agreements that are scheduled to expire, or did expire, in a particular time frame. By default, Service Agreements that automatically renewed will not appear on this report unless you choose to include them based on your selection sets. Prior to this report, you had to run the Customer Contract Report and use the proper filters to get a list of contracts that expired. This report makes it easier, as you can simply choose the expiration date range you want without having to also choose contract start dates.

Project Management History Report

A new Project Management History Report has been added to the Project Management Reports section. This report provides a breakdown of Subs, Material, Labor and Other Costs for each Phase or Change Order of the selected jobs. The actual costs and hours incurred to date are compared to the estimated costs and hours for each phase or change order, and a percentage of completion is calculated. Subtotals are provided for each phase and change order, as well as for the overall job. The report will also show the Gross Margin in both a percentage and dollar amount, as well as the Estimated vs. the Job to Date Billed and the variance along with the estimated and Job to Date Gross Profit per Hour and Gross Profit per Man Day (8 hours).

Report Menu Re-Designed

The report menu has been re-designed to list each report section in an easier to view format. Clicking on a report section will list the reports available in that particular section. The Report Description toggle has been moved to the top right hand side under the "Scheduled Reports" option.

Work Orders

Work Order Listing

When viewing the Work Order list (Work Orders Menu Option), you can now click on the Scheduled Date / Time field for a selected line item and the system will automatically take you to that date on the Dispatch Board.

Priority has been added to the Problem Code File

A "Priority" field has been added to the Problem Code file, which will automatically fill in a Priority on the Work Order based on the Problem Code selected. For example, you might want to assign an Inspection one priority and a No Cool call with a different priority. This will allow you to quickly distinguish the priority of a call on the Dispatch Board. The priority can be overridden on the Work Order if necessary.

Notes field has been added to the Problem Code File

A "Notes" field has been added to the Problem Code file, which will automatically populate the "Problem Reported" field on a Work Order based on the Problem Code selected. This can be helpful for specific problem codes, such as inspection problem codes. If you offer several different types of inspections, you can set up a problem code for each inspection type along with what is included in that particular inspection. For example, you may offer a 15 point tune up, a 20 point tune up and a 25 point tune up. If you add each as their own Problem Code, you can use that Problem Code when the system generates the inspection slip so that the technician knows what they need to do when they receive the call on their mobile device.

Dispatching

Technician "On the Way" text and/or or Email

A new Communication Template has been added that will allow the system to automatically send a notice to the Customer when the technician starts traveling to their site. The notice can be sent via SMS Text Message or E-Mail and can be defined to send upon the first travel to that customer for the day, or for each travel instance. For example, if you track travel "Portal to Portal", you typically would not want the system to send a notice when the tech leaves the job and starts travel time back to the office. Or if you track travel time as opposed to working time if the technician has to run to the supply house for parts, you probably would not want a notice sent to the customer in that situation. Therefore you can define the "Tech on the Way" communication template to only send reminder for first status change to traveling. Like with all Communication Templates, you can define the system to exclude certain customer types from receiving automatic notices. For example, you might want to exclude commercial customers from receiving a notice that a technician is on the way. The new template is called "Tech on the Way Reminder" and can be found in the Communications Template in the Settings.

*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.
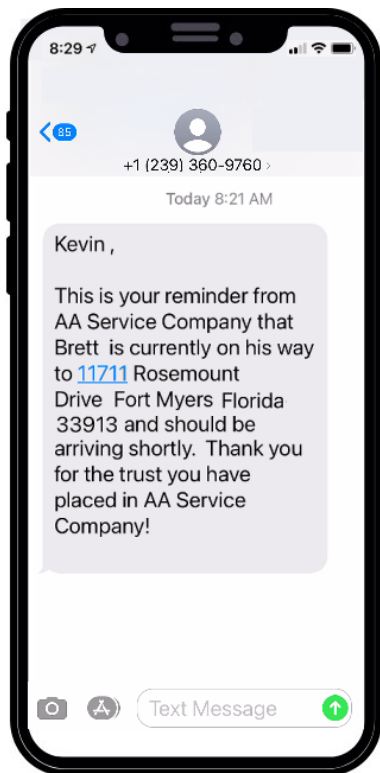
ServiceFactor Mobile

Ability to view hours worked detail has been added to the Work Order

A technician can now easily view the number of accumulated hours worked on a Work Order in SF Mobile. By tapping the Dispatch Time icon at the top of the Items Screen, a detailed Timesheet screen will be displayed that shows the accumulated travel time, working time and total time on the Work Order. If a technician is still dispatched to the Call, the Times at the top of the screen will appear in RED, indicating that someone still has open time and the accumulated time will be calculated up until the current time for those records. You can easily see which records have open times, as they will appear in green in the Timesheet screen. This is a great feature for companies that charge Time and Material, as opposed to Flat Rate, in that you can quickly see how much time to charge for Travel Time, Working Time, or Total Time.