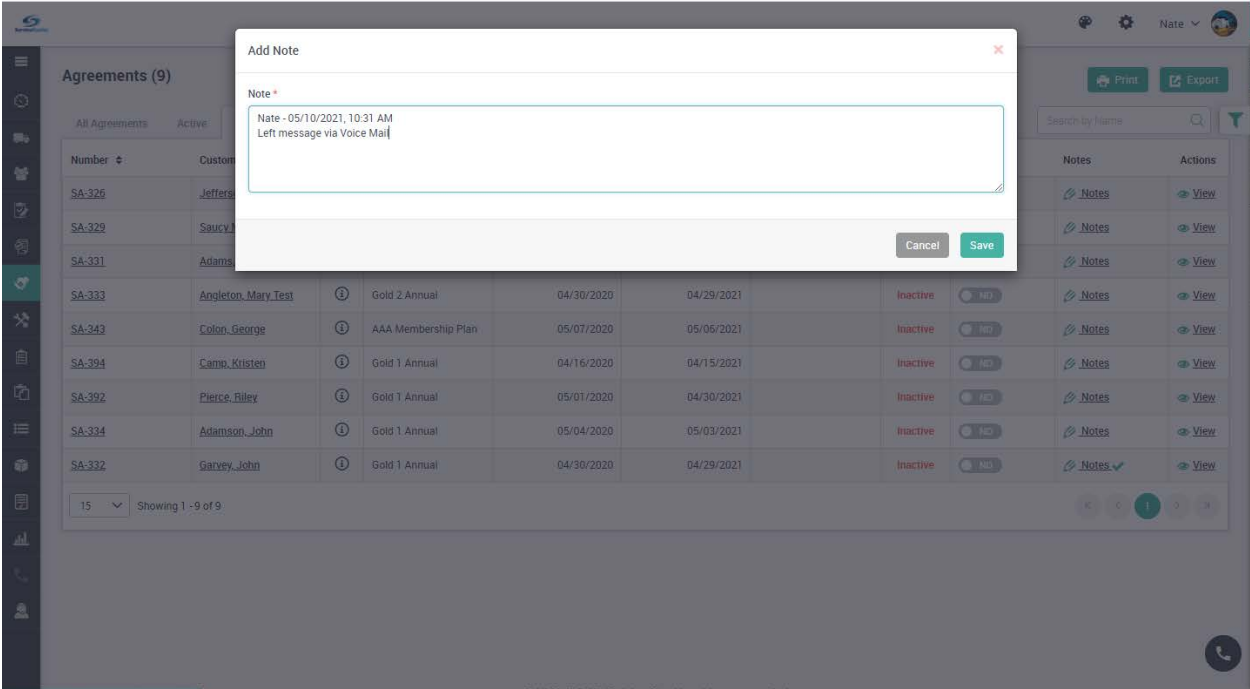


SF Release Notes: May 17, 2021

Service Agreements

Notes have been added to the Expired and Recently Expired Service Agreement Listing tabs

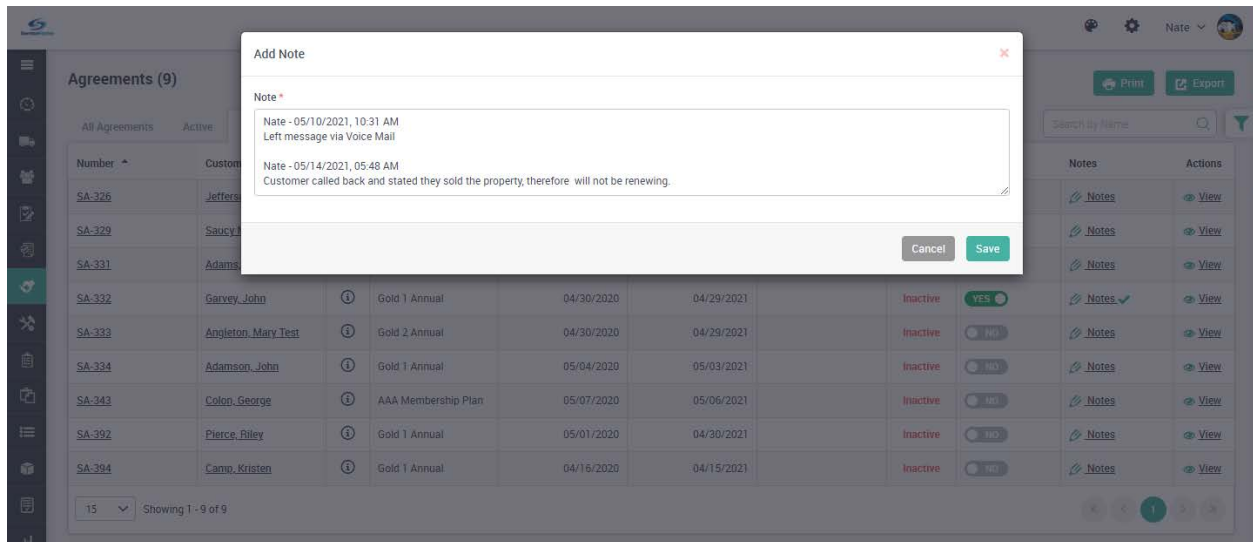
A new “Notes” option has been added to the Expired and Recently Expired tabs in the Service Agreement Listing. This will allow you to enter notes about any contact you make with the customer when attempting to renew their service agreement. This will allow you to make notes when you try to contact the customer, various discussions you have had while trying to renew, etc. When you add a new note, the system will automatically enter the user name, as well as the date and time the note was added. If you add a note for the customer, a check mark will appear next to the Notes hyperlink, indicating that there are notes associated with the record.



Notes	
	Notes
	Notes
	Notes
	Notes ✓
	Notes

The ability to Suppress Expired Service Agreements has been added to the Expired and Recently Expired Service Agreement Listing tabs

You now have the ability to “Suppress” expired Service Agreements from the Expired and Recently Expired Service Agreements Listing tabs. When you turn the “Suppress” slider to on, the “Notes” field will open so that you can enter a note as to why you are suppressing the service agreement. Once you have suppressed the service agreement, it will no longer appear in the listing by default. If you want to view suppressed service agreements, you can use the Advanced Filter option to view suppressed agreements.

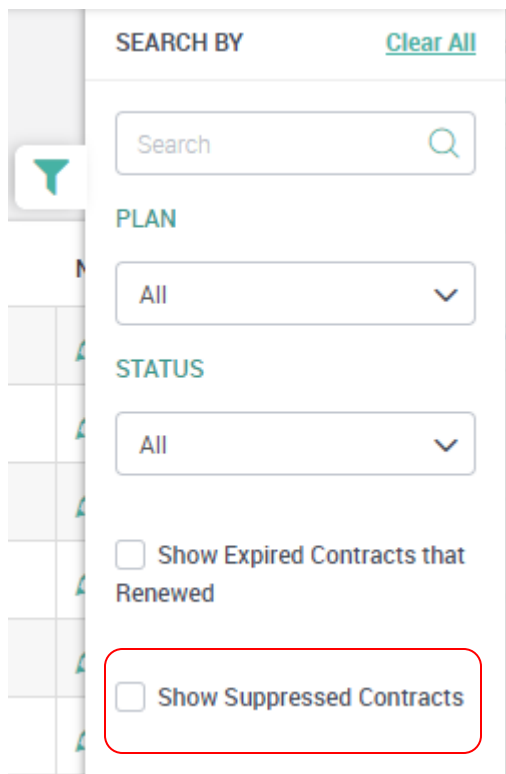


The screenshot shows a web application interface for managing service agreements. A modal dialog titled "Add Note" is open, allowing the user to enter a note for a specific agreement. The background shows a table of agreements with columns for Number, Customer, Plan, Status, and Dates. The "Add Note" dialog contains two text input fields with the following content:

- Note - 05/10/2021, 10:31 AM: Left message via Voice Mail
- Note - 05/14/2021, 05:48 AM: Customer called back and stated they sold the property, therefore will not be renewing.

The dialog has "Cancel" and "Save" buttons. The table below shows several rows of agreements, including SA-326 through SA-394, with various plans and statuses.

Number	Customer	Plan	Status	Start Date	End Date	Notes	Actions
SA-326	Jeffers						
SA-329	Saucy						
SA-331	Adams						
SA-332	Garvey, John	Gold 1 Annual	Inactive	04/30/2020	04/29/2021		Notes View
SA-333	Angliston, Mary Test	Gold 2 Annual	Inactive	04/30/2020	04/29/2021		Notes View
SA-334	Adamson, John	Gold 1 Annual	Inactive	05/04/2020	05/03/2021		Notes View
SA-343	Colon, George	AAA Membership Plan	Inactive	05/07/2020	05/06/2021		Notes View
SA-392	Pierce, Riley	Gold 1 Annual	Inactive	05/01/2020	04/30/2021		Notes View
SA-394	Camp, Kristen	Gold 1 Annual	Inactive	04/16/2020	04/15/2021		Notes View



The screenshot shows the "SEARCH BY" filter panel. It includes a search input field, a "Clear All" link, and two dropdown menus for "PLAN" and "STATUS", both currently set to "All". There are two checkboxes at the bottom:

- Show Expired Contracts that Renewed
- Show Suppressed Contracts

The "Show Suppressed Contracts" checkbox is highlighted with a red rounded rectangle.

Ability to click the “Skip Inspection” option for Expired Service Agreements

You now have the ability to click the “Skip Inspection” option on an expired Service Agreement. This will remove the inspection from showing up in the “Missed Inspection” list if you are not going to perform the inspection. To skip the inspection from an expired service agreement, bring up the Service Agreement, go to the Maintenance Scheduled Tab and click the “Skip” link. This will “skip” that inspection, which will no longer appear on the Missed Inspection list.

The screenshot shows a user interface for viewing a service agreement for Jennifer Anderson. The 'Maintenance Schedule' tab is active, displaying a table of inspection schedules. The second row in the table has a 'Skip' link in the final column.

Confirmation	WO #	Problem Code	Est. Time	Equipment	Schedule date	Next Date	Non Billable		
<input checked="" type="checkbox"/>	WO-313	Insp 1	0.00	AC001 AH001	10/07/2019	04/06/2020	FL72020 Search and select	0.00	
<input checked="" type="checkbox"/>		Insp 1	0.00	AC001 AH001	04/06/2020		FL72020 Search and select	0.00	Skip

Quotes

Follow Up Date has been added to the Quote Listing Screen

The Follow Up Date has been added to the Quote Listing screen, as well as the Advanced Filter. This will allow you to quickly see when you need to follow up on a quote without having to drill into it.

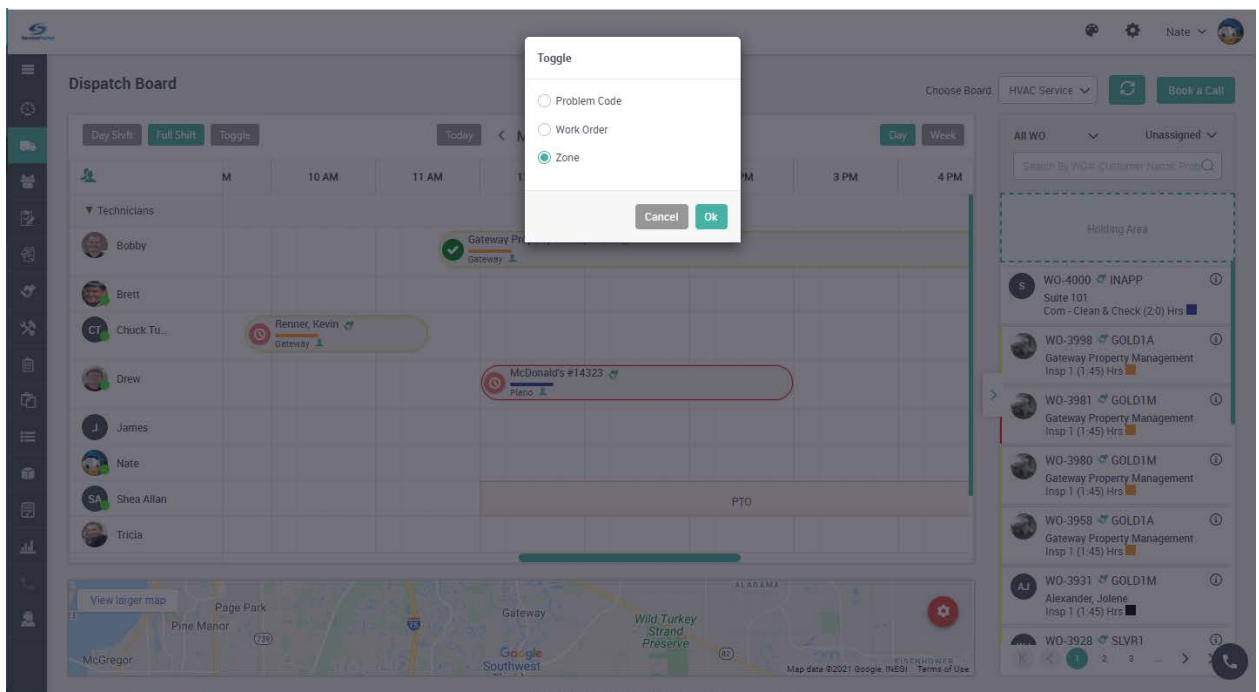
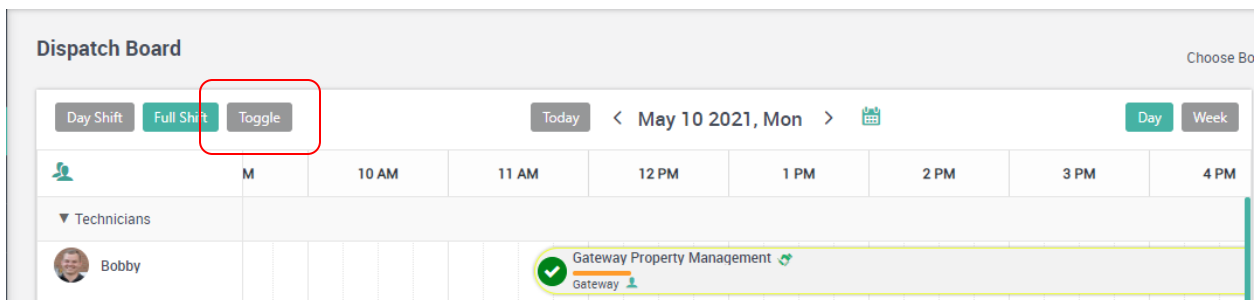
The screenshot shows a list of quotes with a new 'Follow Up' column highlighted by a red box. The table includes columns for Quote #, Site Name, Sales Person, Business Entity, Lead Source, Total Amount, Quote Date, Expiry Date, Follow Up, Status, and Saved.

Quotes #	Site Name	Sales Person	Business Entity	Lead Source	Total Amount	Quote Date	Expiry Date	Follow Up	Status	Saved
191	Bass, Denise	Drew		Google	\$825.61	12/13/2019	01/13/2020	01/15/2020	Pending	-
219	Smith, Betty	Nate		Existing Customer	\$200.00	01/15/2020	02/15/2020	01/15/2020	Pending	✓
449	Spears, Michael	Drew		Existing Customer	\$572.00	11/18/2020	12/18/2020	01/20/2021	Scheduled	✓
221	Richards, Sean	Nate		Existing Customer	\$2,140.43	01/22/2020	02/22/2020	01/22/2020	Pending	✓

Dispatch Board

The “Toggle” option you choose will now be “locked” until you log out of the system or manually change it.

By default, the Dispatch Board shows the “Problem Code” as the second line in the schedule card that is displayed on the screen, but you can change it to display the Work Order number or Zone instead. Prior to this release, if you changed the toggle and left the Dispatch Board and went back into it, the card would once again be defaulted to show the Problem Code. With this release, if you change the toggle option, whichever option you chose will now be displayed on the second line when you leave the Dispatch Board and come back into it. If you log completely out of the system and log back in, the Dispatch Board will once again be defaulted to show the Problem Code.



Inventory

Location Inventory Template has been added to the system

A new Location Template has been added to the Inventory Settings that will allow you to define what inventory items you want included in a particular inventory location, along with the Reorder Point and Optimal Quantity. Once you have defined a Location Template, you can use it to build a location, such as a truck inventory. You can also use the Location Template to update existing inventory locations with Reorder Point quantities and Optimal Quantities. Multiple Templates can be used for each location if you desire. Once you have defined a Template and used it to create the inventory for a location, you can use the “Inventory Control” option to stock the location. The Inventory Template makes it quick and easy to set up new locations with inventory, such as a new van, truck, etc. To assign the items from a template to a location, bring up the Location in the Settings and use the “Copy from Template” option.

NOTE – You can update an existing location with a template and it will update any existing items with the new Reorder Point and Optimal Quantity values and add any additional items from the template to the location. If you have items that are not associated with the template assigned to the location, they will not be affected by copying a template to the location.

Edit Location Template ✕

Location Template Name * Active Print Export

Description

Show Associated Items Only YES

Checked	Name	Description	Reorder Point	Optimal Qty
<input checked="" type="checkbox"/>	CAP002	5 MFD Capacitor	<input type="text" value="1"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/>	CAP003	7.5 Mfd 370V Premium Capacitor	<input type="text" value="1"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/>	CAP004	10 Mfd 370V Premium Capacitor	<input type="text" value="1"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/>	CAP005	12.5 Mfd Capacitor	<input type="text" value="1"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/>	CAP006	15 Mfd 370V Premium Capacitor	<input type="text" value="1"/>	<input type="text" value="3"/>
<input checked="" type="checkbox"/>	CAP007	20 Mfd 370V Premium Caapacitor	<input type="text" value="1"/>	<input type="text" value="3"/>

Edit Location ✕

Location Name * Active Copy from template

Description

Save

Communication Templates

You can now define the time of day that you want the 1st and 2nd Service Agreement Inspection Reminders to be sent to the Customer.

You can now define the time of day that you want the reminders sent to the customer. The 1st and 2nd Inspection Reminders are used to send a notification to the customer to remind them to contact the office in order to schedule their upcoming inspections (if you are using the “Confirm” option for the inspection). This will allow you to be better prepared in case you get a large number of calls immediately following the messages being sent.

Please Note, you will need to define the time for both the Email Option as well as the SMS (texting) reminder, as they could both be different if you desire.

Company - Communication Templates

Basic Details

Template: 1st Service Agreement Inspection Reminder

Exclude Customer Type: Commercial

No of days before the reminder should be sent: 20

No of days after the reminder should be sent: 0

Only allow manual sending

Send At (Approximate): 11:00

Email | SMS | Phone

This template is used to specify the first reminder message that will be sent to a customer when they have an upcoming Agreement-related Work Order.

Active

Reply to Address: william@servicefactor.com

BCC: support@servicefactor.com

Subject *: AA Service Inspection Reminder

Miscellaneous Items

Email Sending has been completely revamped and improved

The email function has been revamped to now allow you to modify the subject and body of the invoice, add additional Email addresses, enter a cc email address and add attachments. When you click the Email option throughout various sections of ServiceFactor, the new “Email” screen will appear that will show you the default text from the communication template, as well as the default contact’s email address. If there are any attachments associated with the module from which the email is being sent, they will be listed and you can choose if you want them to be included in the email. You can also attach any other attachment that you deem necessary. If you have multiple email addresses associated with the customer’s record, you can use the space bar in the “To” field and it will list all email addresses associated with the customer and allow you to select whichever address you desire. You can also manually enter an email address as well as change the text of the email that will be sent. When you send an email, an entry will be made to the Timeline indicating when and to whom it was sent, as well as who sent it.

The screenshot shows the 'Email' composition window. At the top, there's a title bar 'Email' with a close button. Below it, the 'To' field contains 'nate@teamservice.com'. The 'CC' field is empty. The 'Subject' field contains 'AA Service Invoice'. The 'Email Body' section has a rich text editor with a toolbar and the following text: 'Bonnie, Thank you for your business. To view Invoice #A-3459 from AA Service, or download a PDF copy for your records, simply click on the attachment. Thank you for allowing AA Service to be of assistance to you, it was a pleasure serving you. Sincerely, body p'. Below the body is the 'Timeline Attachments' section, which lists an attachment 'Invoice_10735_Invoice_print' with a checkbox checked. At the bottom, there's an 'Attachment' field with '+ Choose' and 'Add' buttons, and a 'Submit' button.

05/17/2021



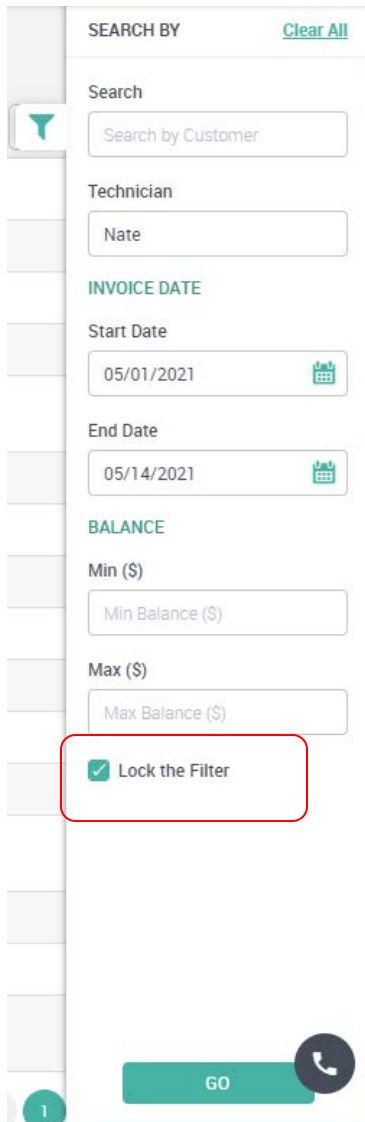
Nate

Invoice was sent to nate@teamservice.com

07:43 AM

The ability to “Lock” filters has been added to the Work Orders and Invoices Listing

You can now choose to “Lock” the advanced filters that you have chosen for the Work Orders and Invoices listings, which will maintain the filter(s) you have chosen even if you leave the particular listing screen. For example, you may want to review all of the invoices generated by a particular technician for a particular date range. If this is the case, you can select the dates and technician and put a check mark in the “Lock the Filter” check box. This will maintain the particular filter each time you go back into the “Invoices” menu option until you remove the check mark, or click the “Clear All” link next to the filters applied at the top of the listing screen.



SEARCH BY [Clear All](#)

Search

Search by Customer

Technician

Nate

INVOICE DATE

Start Date

05/01/2021

End Date

05/14/2021

BALANCE

Min (\$)

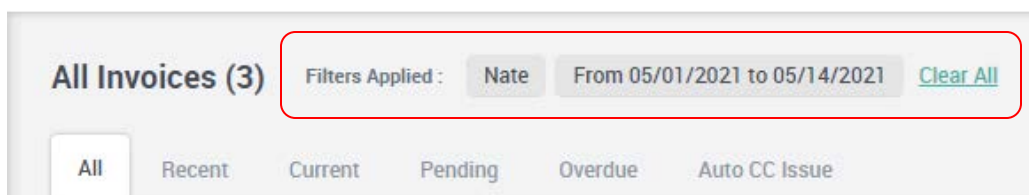
Min Balance (\$)

Max (\$)

Max Balance (\$)

Lock the Filter

GO



All Invoices (3) Filters Applied : Nate From 05/01/2021 to 05/14/2021 [Clear All](#)

All Recent Current Pending Overdue Auto CC Issue