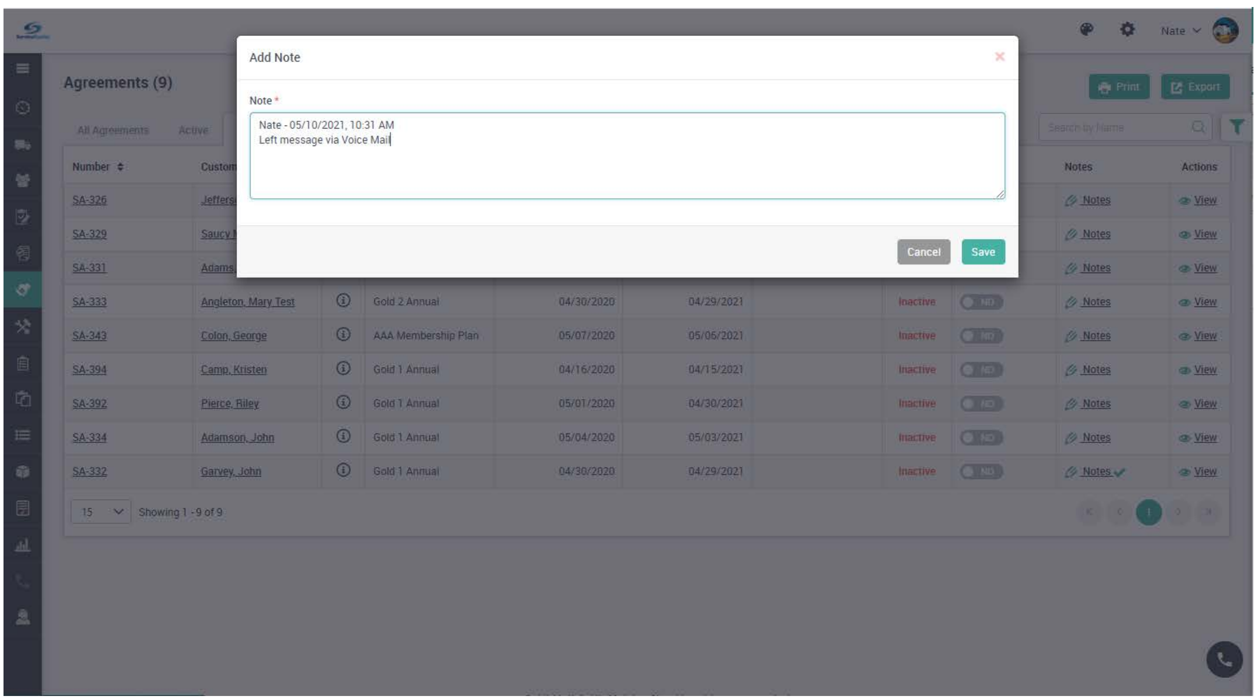
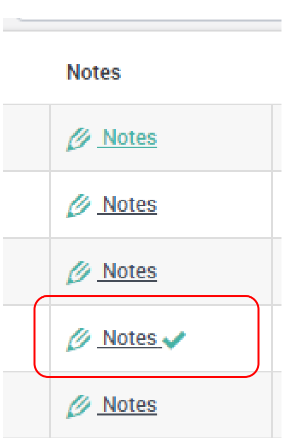
SF Release Notes: May 17, 2021

Service Agreements

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

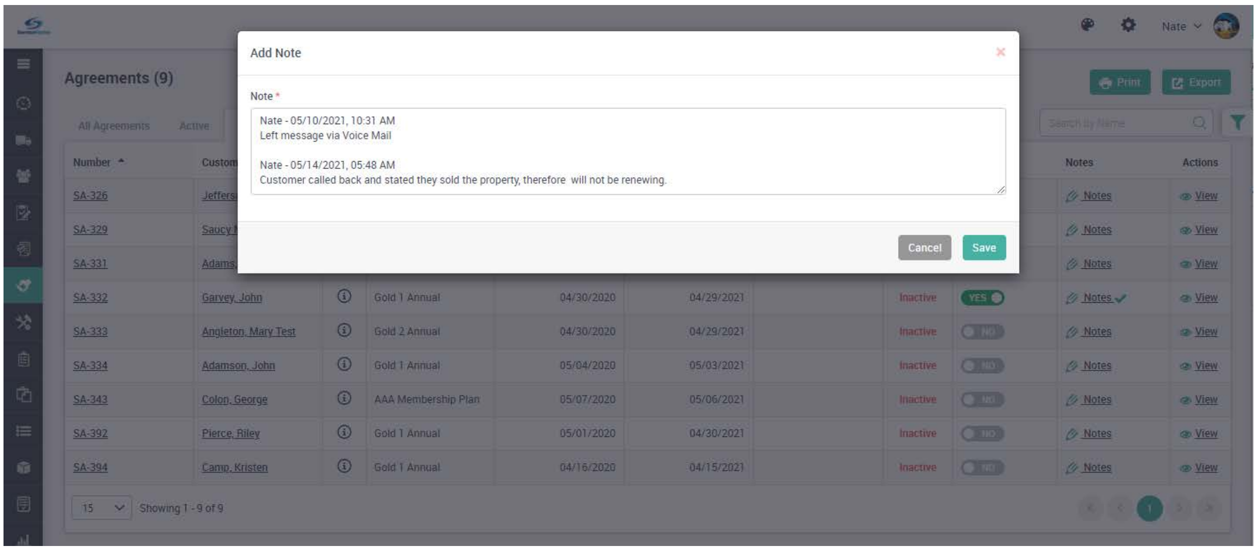
A new “Notes” option has been added to the Expired and Recently Expired tabs in the Service Agreement Listing. This will allow you to enter notes about any contact you make with the customer when attempting to renew their service agreement. This will allow you to make notes when you try to contact the 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.

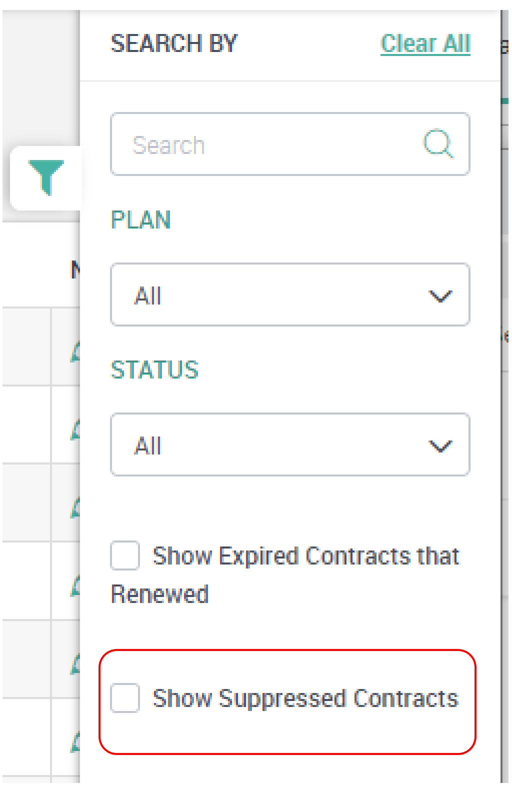




The ability to Suppress Expired Service Agreements has been added to the Expired and Recently Expired Service Agreement Listing tabs

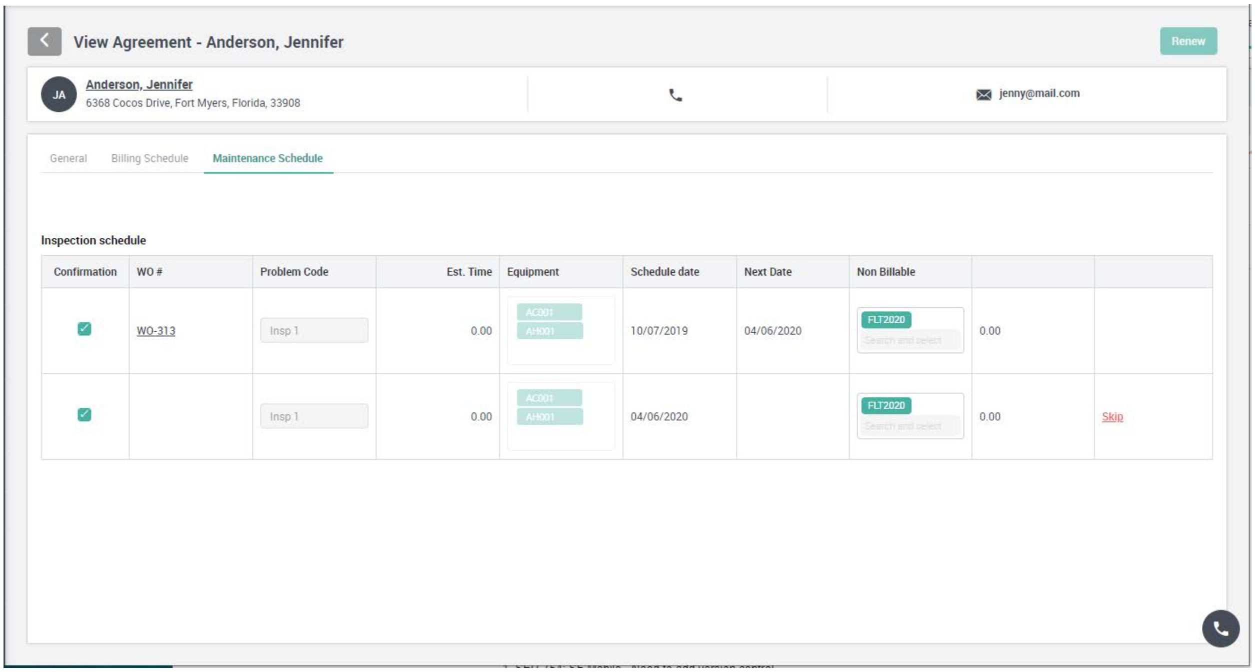
You now have the ability to “Suppress” expired Service Agreements from the Expired and Recently Expired Service Agreements Listing tabs. When you turn the “Suppress” slider to on, the “Notes” field will open so that you can enter a note as to why you are suppressing the service agreement. Once you have 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.





Ability to click the "Skip Inspection" option for Expired Service Agreements

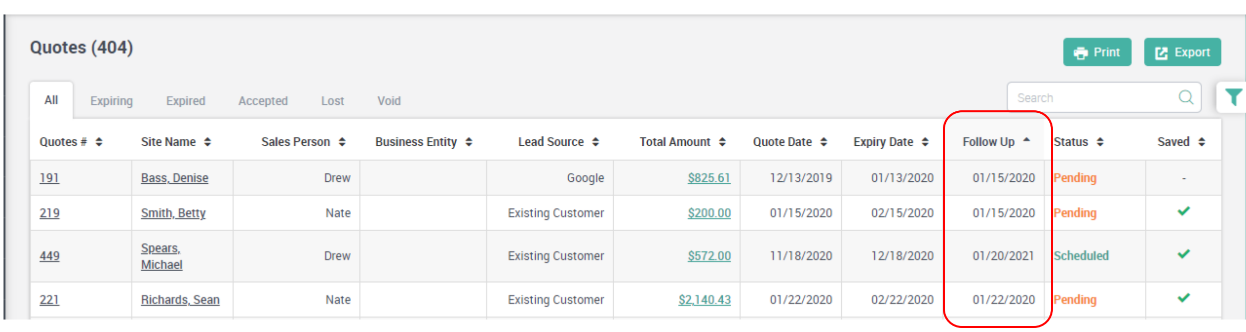
You now have the ability to click the "Skip Inspection" option on an expired Service Agreement. This will remove the inspection from showing up in the "Missed Inspection" list if you are not going to perform the inspection. To skip the inspection from an expired service agreement, bring up the Service 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.



Quotes

Follow Up Date has been added to the Quote Listing Screen

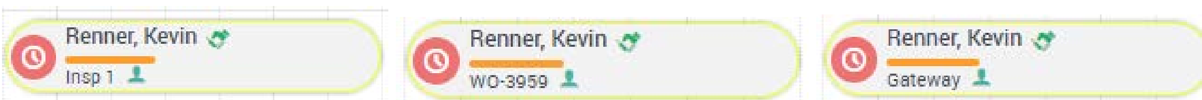
The Follow Up Date has been added to the Quote Listing screen, as well as the Advanced Filter. This will allow you to quickly see when you need to follow up on a quote without having to drill into it.



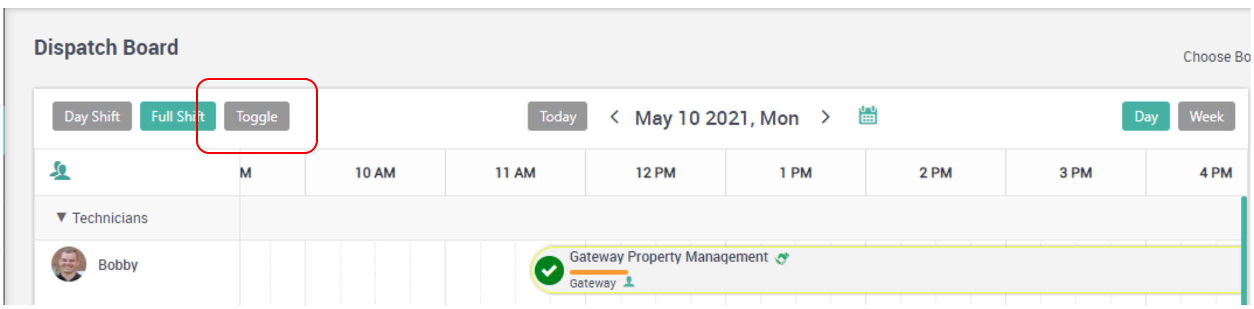
Dispatch Board

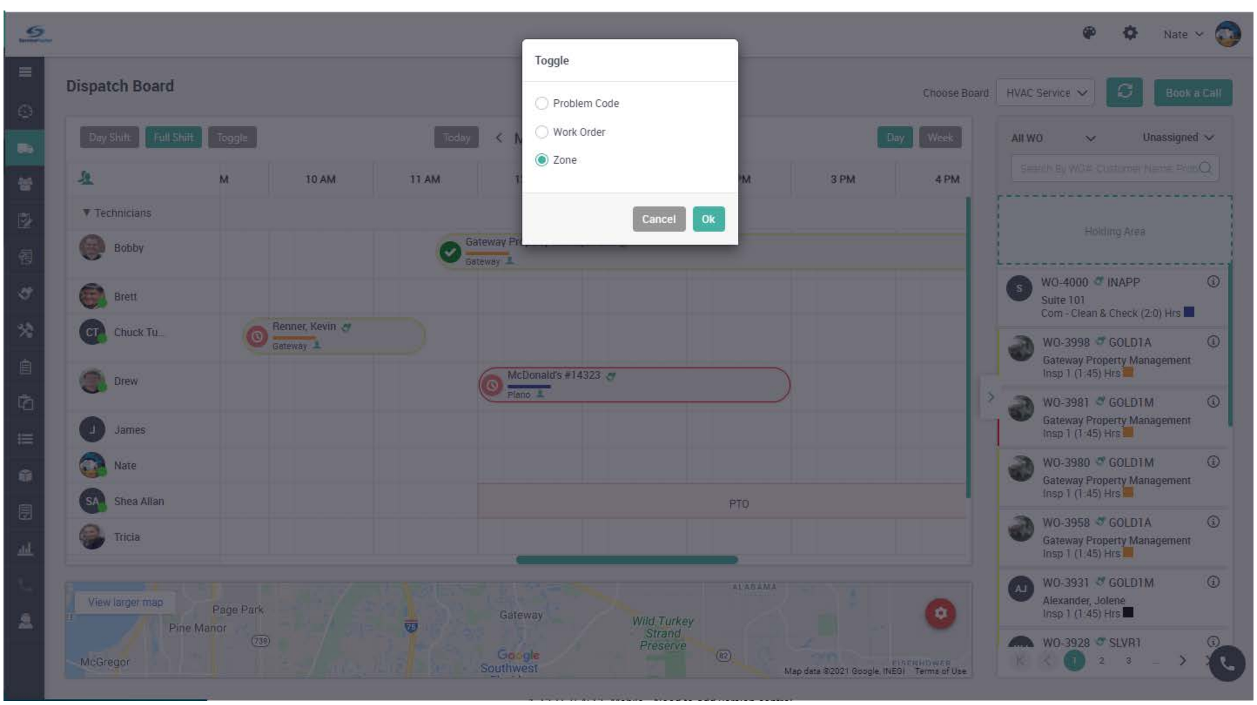
The “Toggle” option you choose will now be “locked” until you log out of the system or manually change it.

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.



Problem Code **Work Order Number** **Zone**



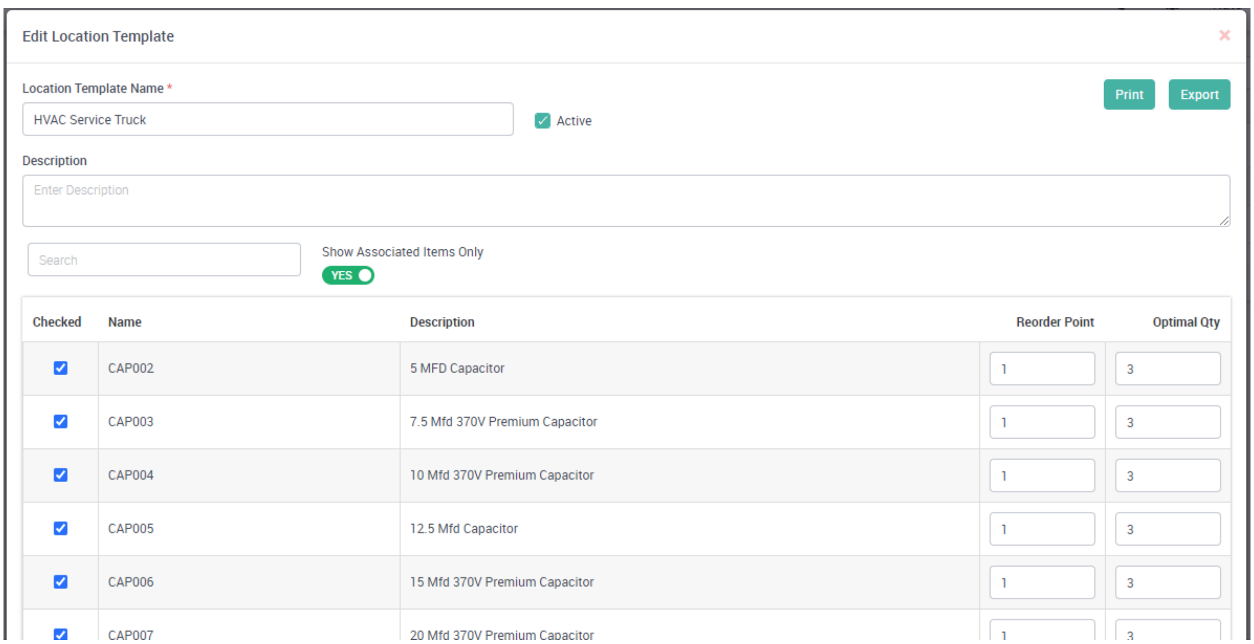


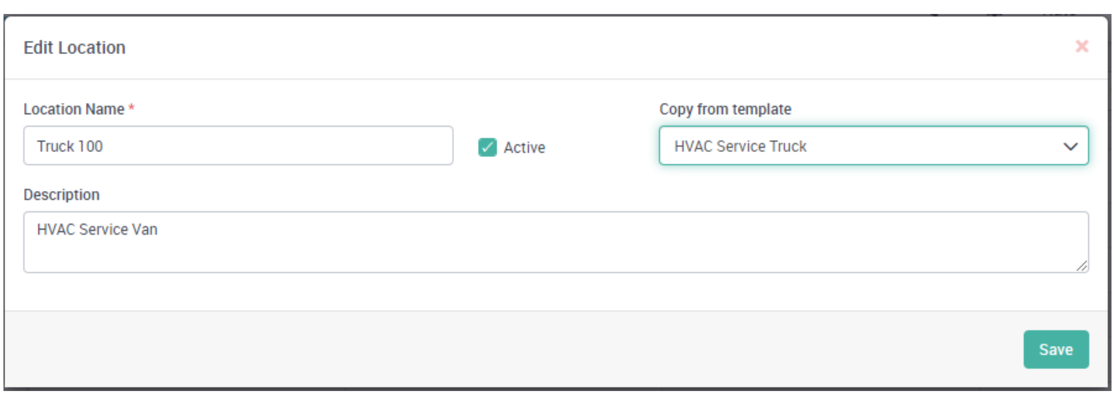
Inventory

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.



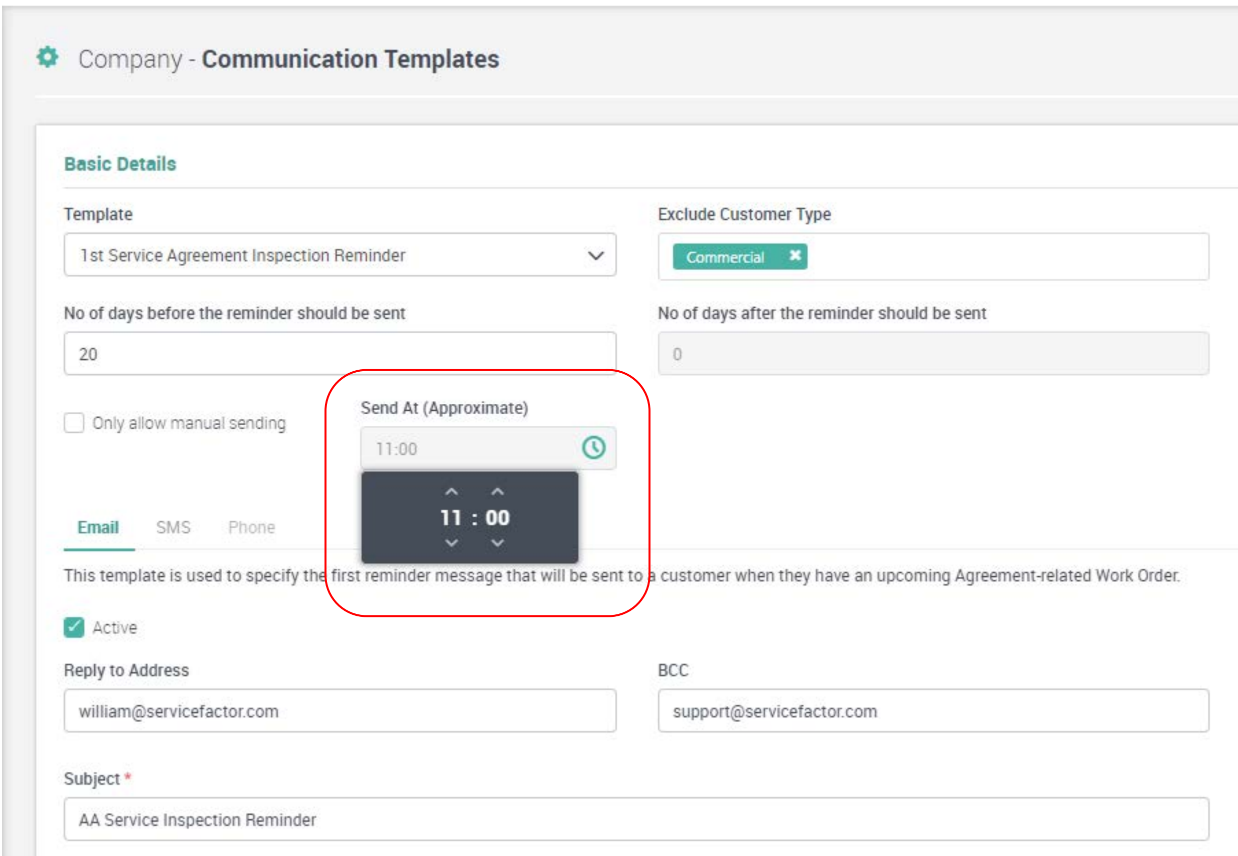


Communication Templates

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.

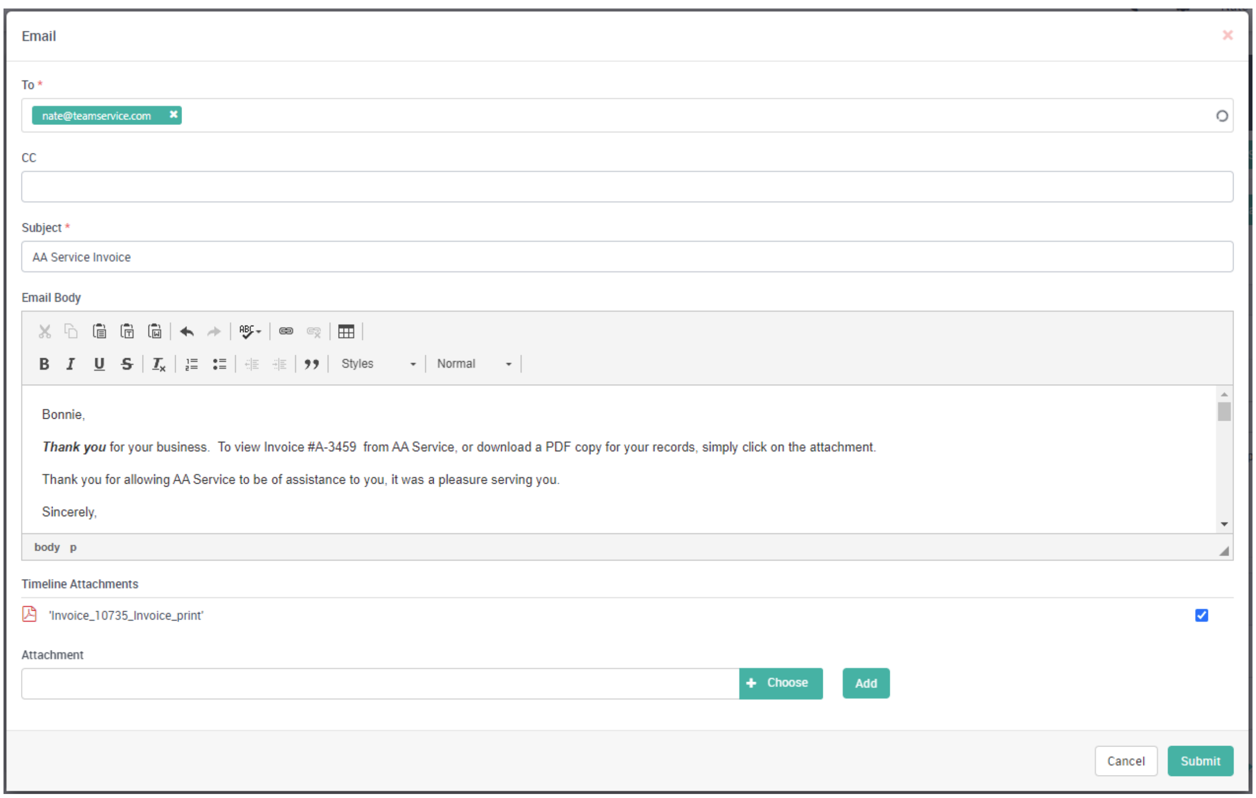
Please Note, you will need to define the time for both the Email Option as well as the SMS (texting) reminder, as they could both be different if you desire.

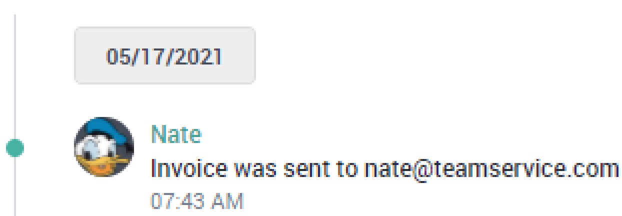


Miscellaneous Items

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 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.