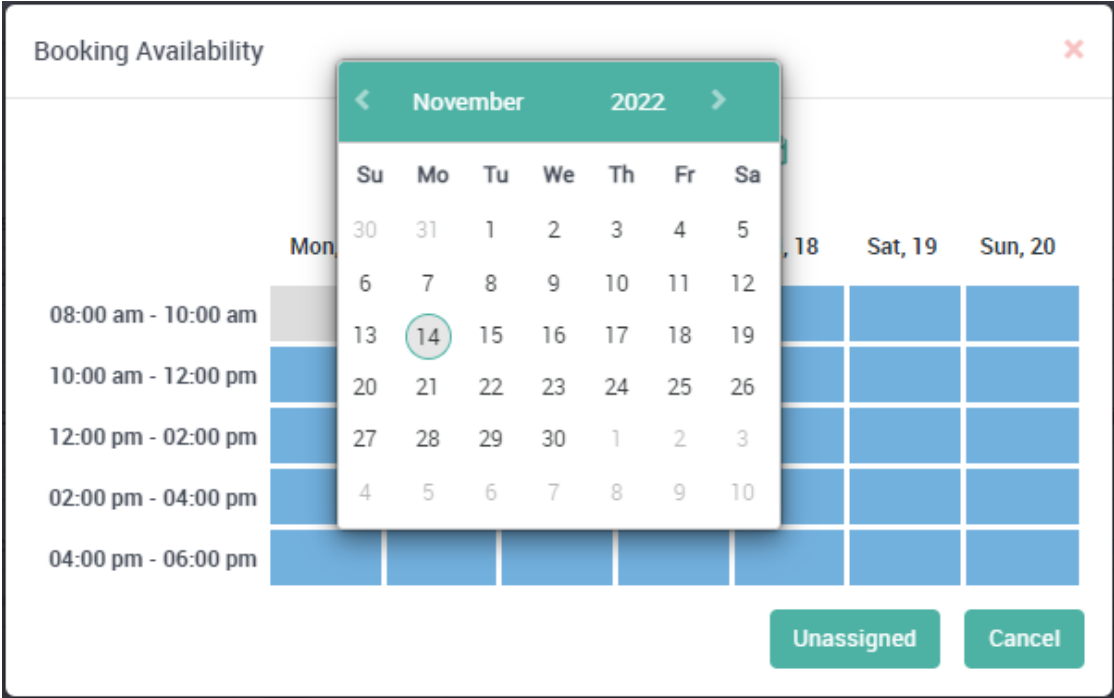
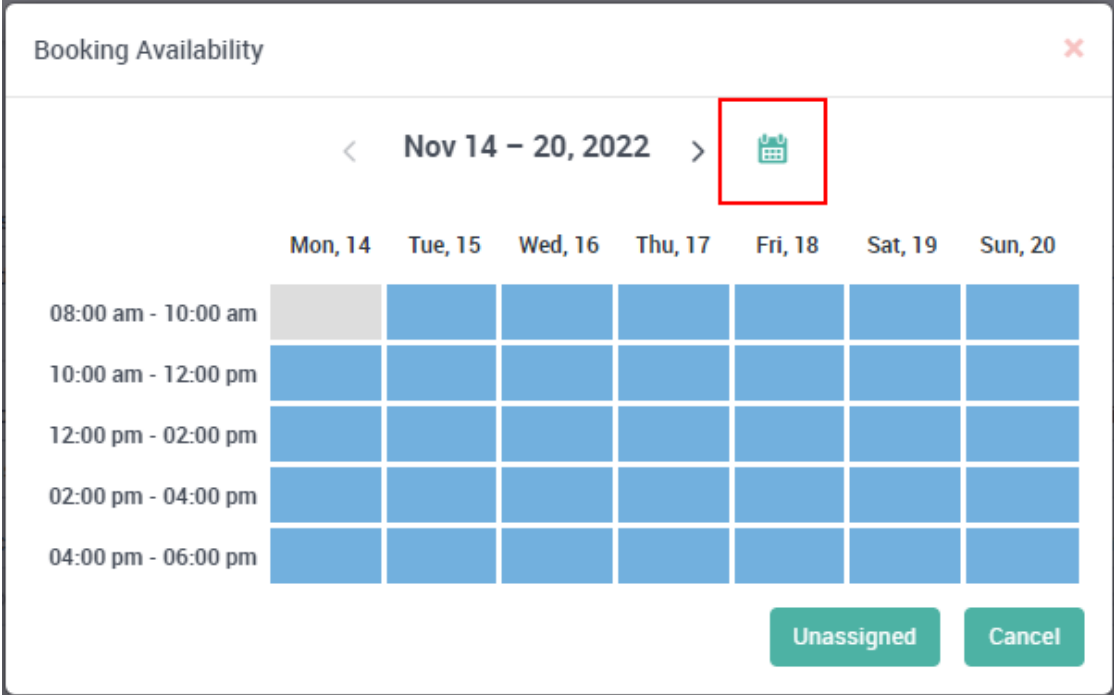


# SF Release Notes: November 16, 2022

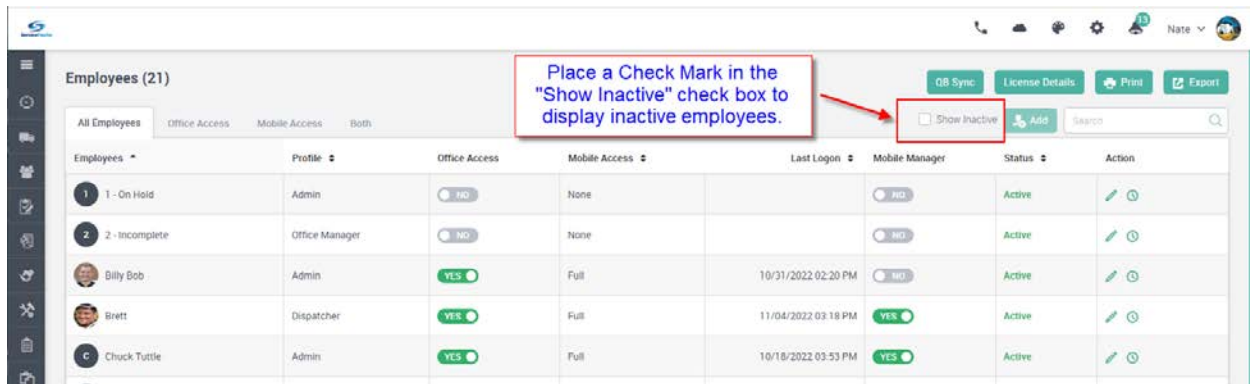
## Calendar Icon has been added to the Work Order Scheduling Blocks

A calendar icon was added to the Work Order Scheduling popup screen, allowing for a faster and easier way to change weeks. Prior to this release, you could only advance or go back one week at a time. When you pick a particular date on the calendar, the scheduling blocks will change starting on the Monday of the week selected.



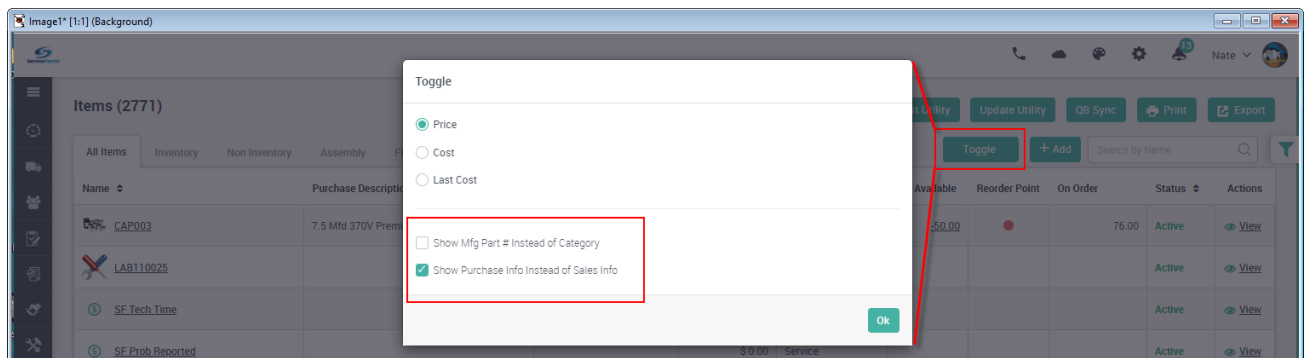
## Employee List – Inactive employees will be suppressed by default

When you bring up the Employee List screen in ServiceFactor, the inactive employees will be suppressed. If you need to view an inactive employee, place a check mark in the “Show Inactive” check box.



## Items – New “Toggle” and search options have been added to the Items Listing screen

You can now toggle the “Category” and/or “Sales Information” columns on the Items Screen to show Manufacturer Part Number and/or Purchase Information respectively. The “Search” field will also search by the Purchase Description and Manufacturer Part number, whether you have toggled the columns or not. When you click the “Toggle” button, an options window will appear that will allow you to select if you want to display the Sell Price, Cost or Last Cost as well as if you want to “Show Manufacturer Part # Instead of Category” and “Show Purchase Info Instead of Sales Info”.



Items (2771) Cost U

All Items | Inventory | Non Inventory | Assembly | Flat Rate

Name	Sales Description	Category	Price	Item Type	Qty Av
CAP003	7.5 MFD 370V Electrical Distributor	Capacitors	\$ 38.46	Inventory	

Items (2771) Cost U

All Items | Inventory | Non Inventory | Assembly | Flat Rate

Name	Purchase Description	Mfg Part #	Price	Item Type	Qty Av
CAP003	7.5 Mfd 370V Premium Capacitor	PAC75	\$ 38.46	Inventory	

## **Project Management – You can now add or change the “Problem Code” assigned to a Phase after the Job has been accepted**

If you forgot to assign a default Problem Code or assigned an incorrect default Problem Code to a Job Phase, you can now change it after the job has been accepted and even after prior work orders have been generated for the phase. Changing the default Problem Code will only affect new Work Orders created for the phase, it will not change prior work orders.

## **Project Management – You can now add or change the “Class” assigned to a Phase after the Job has been accepted**

If you forgot to assign a default Class or assigned an incorrect default Class to a Job Phase, you can now change it after the job has been accepted and even after prior work orders have been generated for the phase. Changing the default Class will only affect new Work Orders created for the phase, it will not change prior work orders.

## **Project Management – You can now change the “Problem Code” assigned to the Change Order after the Change Order has had a Work Order created**

If you change the Problem Code associated with a change order after a previous Work Order has been generated, any new Work Orders created for the Change Order will use the new Problem Code. NOTE – Prior to this release, you could have always changed the Problem Code when generating the Work Order, but now you can change the Problem Code associated with the Change Order so that you do not need to remember to manually change it during Work Order creation.

## **Project Management- You can now change the “Class” assigned to the Change Order after the Change Order has had a Work Order created**

If you change the Class associated with a change order after a previous Work Order has been generated, any new Work Orders created for the Change Order will use the new Class for costing purposes. This will allow you to correct the Class if the incorrect class was assigned to the Change Order.

## Project Management – If the Default Class assigned to a Phase or Change Order is different than the Class assigned to a Problem Code, you now have the option to choose which Class you want associated with the Work Order

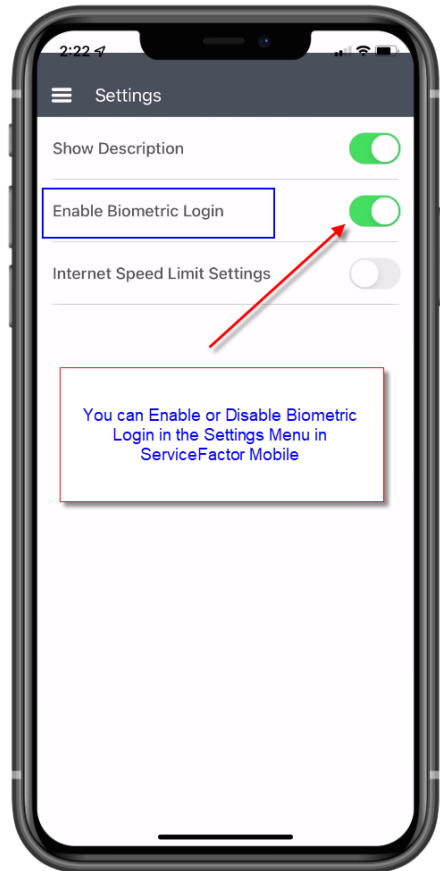
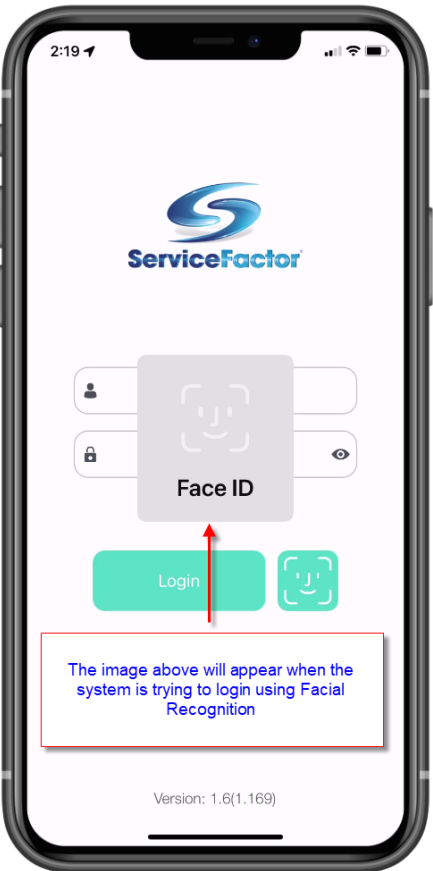
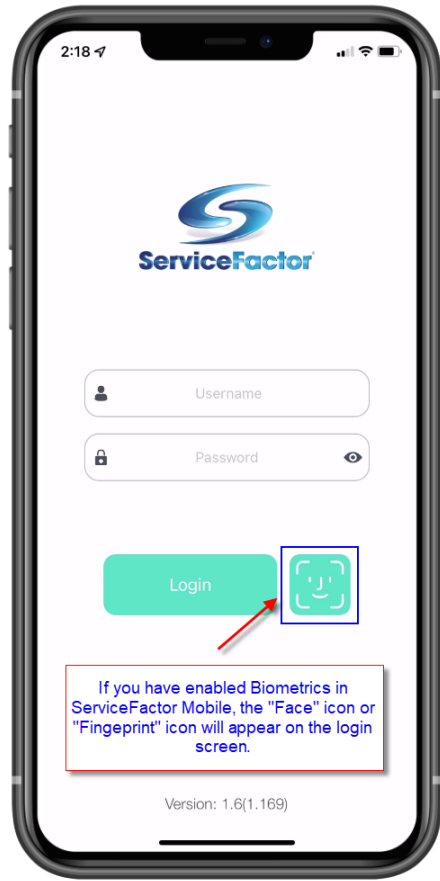
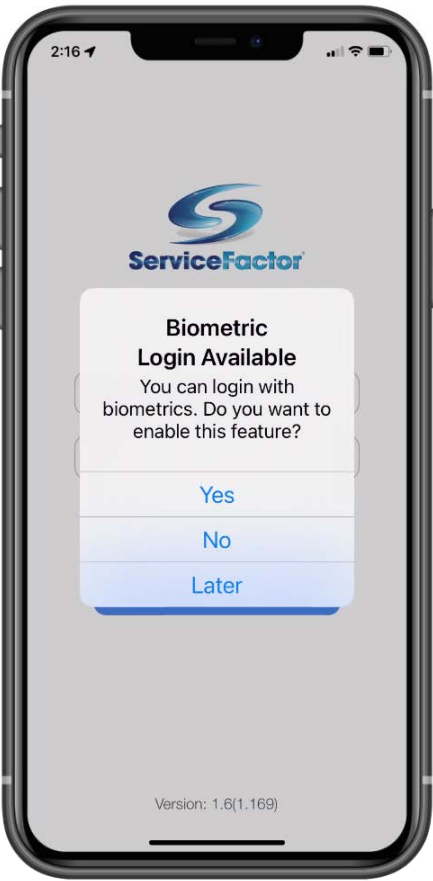
When you create a Work Order for a Phase or Change Order that has a different Class associated with the Problem Code selected than the Default class associated with the Phase or Change Order, you will be prompted if you want to “Use the problem code class” or “Use the change order class”. The class associated with both options will be displayed so that you can choose the appropriate class.

The screenshot shows a web form titled "Schedule Work Order" with a close button (X) in the top right corner. The form contains two input fields: "Lead Source \*" with the value "Existing Customer" and "Problem Code \*" with the value "JC - Change Order". Below these fields, there is a text box containing a blue instruction: "If the Class associated with the Phase or Change Order is different than the class associated with the Problem Code, you will be prompted to choose which Class you want to use when generating a new Work Order for the Job". Below the text box, there are two radio button options: "Use problem code class (Installation)" and "Use change order class (Commercial:IAQ)". The second option is selected, indicated by a green dot. A red arrow points from the text box to the selected radio button. At the bottom right of the form, there are two buttons: "Unassigned" and "Schedule".

## ServiceFactor Mobile – Biometrics have been added to the Login Screen

If your mobile device supports Biometrics and it is enabled, you will have the option to use Biometrics with ServiceFactor Mobile for logging in. The biometrics login will work with either the Face ID or Finger Print option, depending on which your device supports. If you enable Biometric Login and are using Facial Recognition, the system will automatically try to login using Facial Recognition if you are logged out and open the App. If you are using the fingerprint option, the system will prompt you to provide your fingerprint if you are logged out and try to access the App. With either option enabled, you will still be able to use the traditional login and password if the system does not recognize your face or fingerprint.

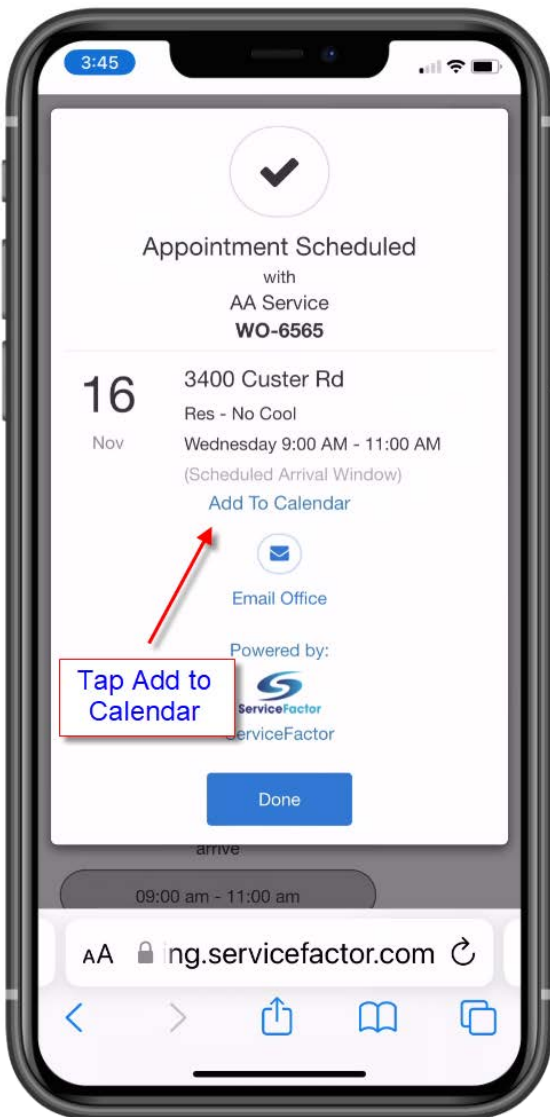
**NOTE** – You will be prompted if you want to use Biometrics when you first login to ServiceFactor Mobile. If you want to change the setting in the future, you can change them by going to the “Settings” menu in ServiceFactor Mobile on the individual device.



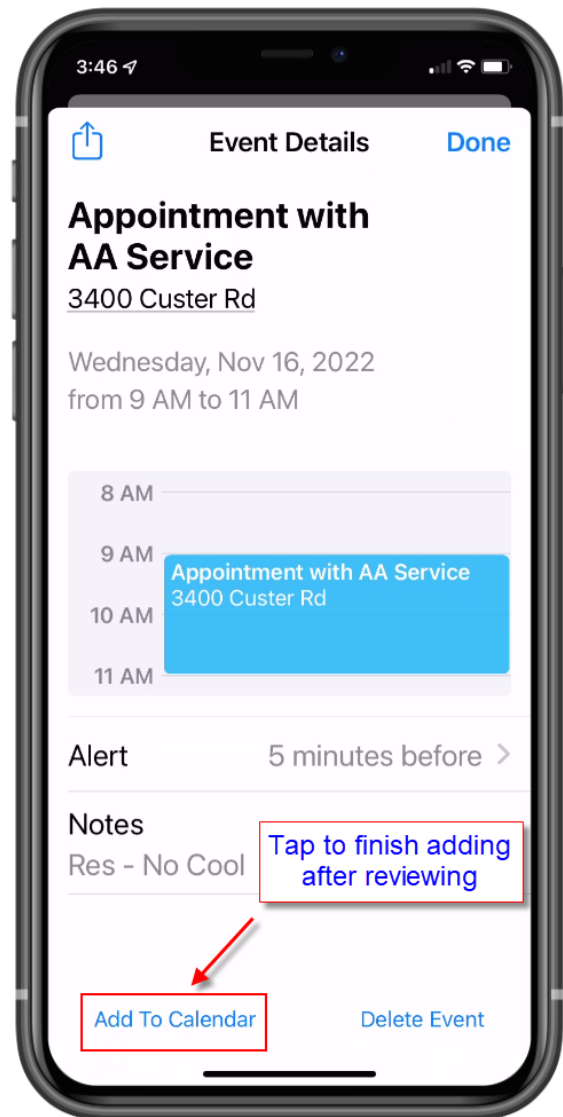
## ServiceFactor Customer Portal – Add to Calendar option has been added to the Appointment Reminder

When a customer books a call or schedules an inspection through the ServiceFactor Customer Portal, a new “Add to Calendar” link has been added to the Appointment Verification screen. By clicking the link, the customer will be able to add the reminder to their calendar.

**NOTE** – The image on the right is from adding the appointment to and Apple Calendar on an iPhone. Other Calendars, including Google, may look different, but the concept is the same.



Tap Add to Calendar



Tap to finish adding after reviewing