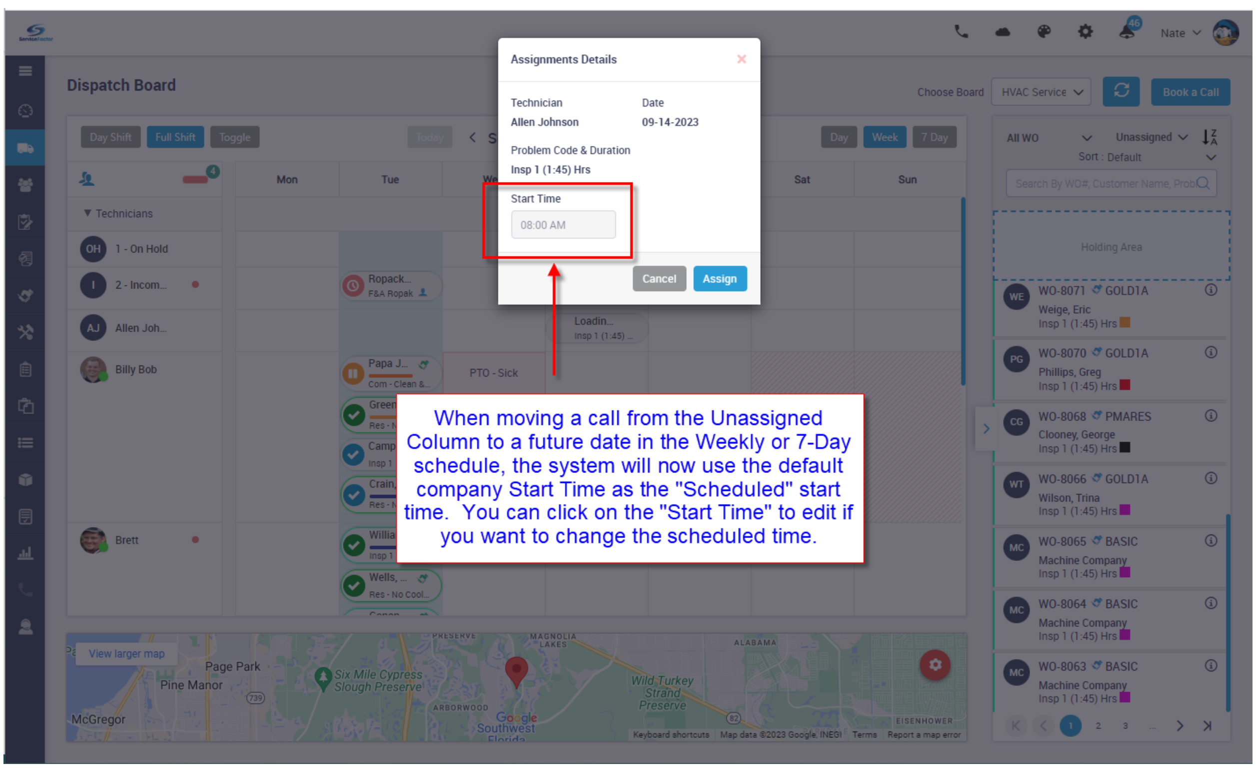
SF Release Notes: September 14, 2023

Dispatch Board – Weekly Schedule - Dropping a call from the Unassigned column on the Weekly Scheduled will now use the default “Company Start Time” for the scheduled time

If you are on the Weekly View or 7-Day View of the Dispatch Board and you drag and drop a call from the unassigned column, the system will now default the Scheduled Time to the default company “Start Time” from the Master Settings. For example, if your default company start time is 7:30 AM, the system will use that as the default scheduled time when dropping the call on a future date in the Weekly or 7-Day Schedule. Prior to this release, the system would default the scheduled time to the current time that the call was moved from the Unassigned column to the weekly schedule. **NOTE –** Click the “Start Time” to change the Scheduled Start time.

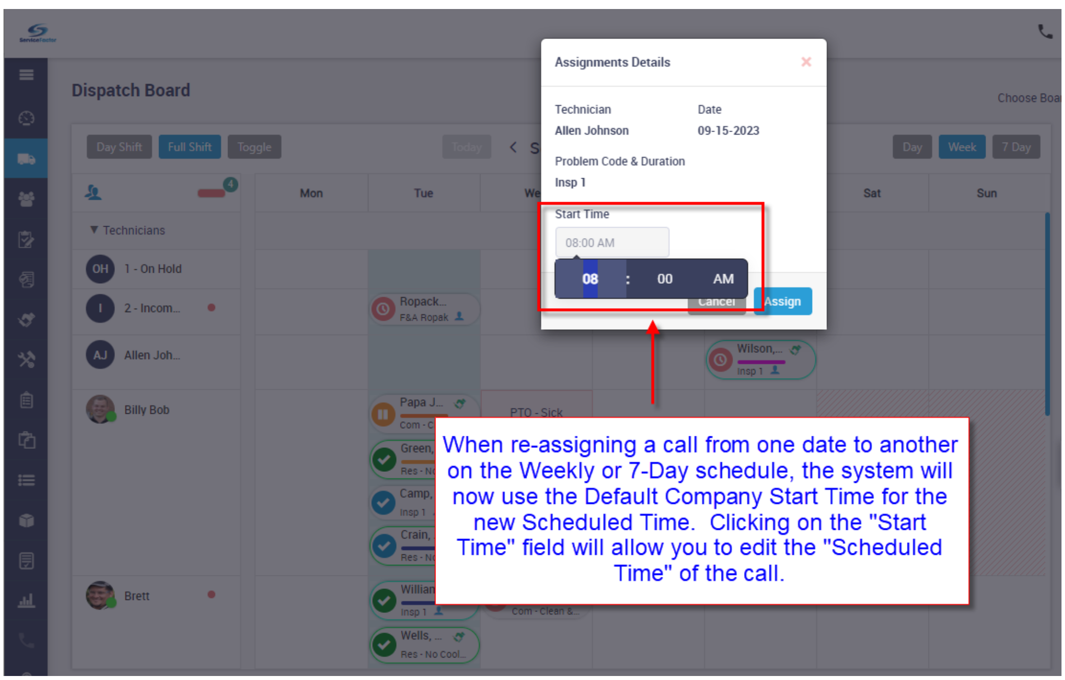
NOTE – If you move a call from the Unassigned Column to the current date on the Weekly or 7-Day schedule board, the system will use the next closest quarter hour for the scheduled time if it is after the default Company Start Time. For example, if it is 3:23 PM and you move a call from the Unassigned Column to the current date, the system will use “3:30 PM” as the “Start Time” (Scheduled Time). Again, clicking on the “Start Time” field will allow you to change the scheduled start time.

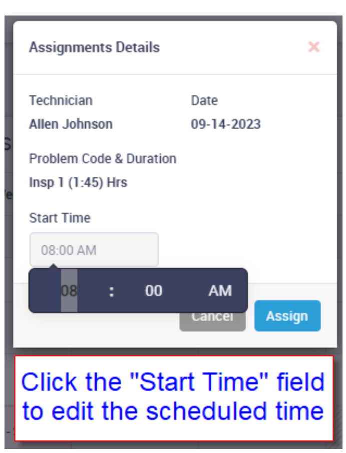


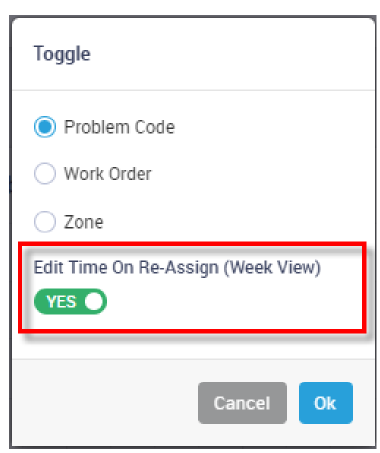
Dispatch Board – Weekly Schedule – When moving a call from one date to another on the Weekly or 7-Day Schedule, you will now be prompted with the time you want to schedule the call for the new date.

If you are on the Weekly or 7-Day Schedule and you move a scheduled call from one date to another, the system will now default the Scheduled Time on the new date to the default company “Start Time” from the Master Settings. Prior to this release, the system would use the scheduled time from the prior day for the scheduled time for the new day. This will make it easier to find the calls that you rescheduled on the daily dispatch board since they will all start at the beginning of the day. **NOTE –** You can click on the “Start Time” field to change the scheduled start time when rescheduling the call in the Weekly or 7-Day schedule.

NOTE – If you want the system to use the prior scheduled time instead of the “Company Start Time” when moving a call to a different date on the Weekly or 7-Day schedule, click the “Toggle Button” at the top of the Dispatch Board and turn the “Edit Time on Re-Assign (week view)” slider to “No”. This will cause the system to work as it did prior to the update. If you change the Slider in the Toggle popup, it will remain with that setting until you log out of SF or until you manually change it back.

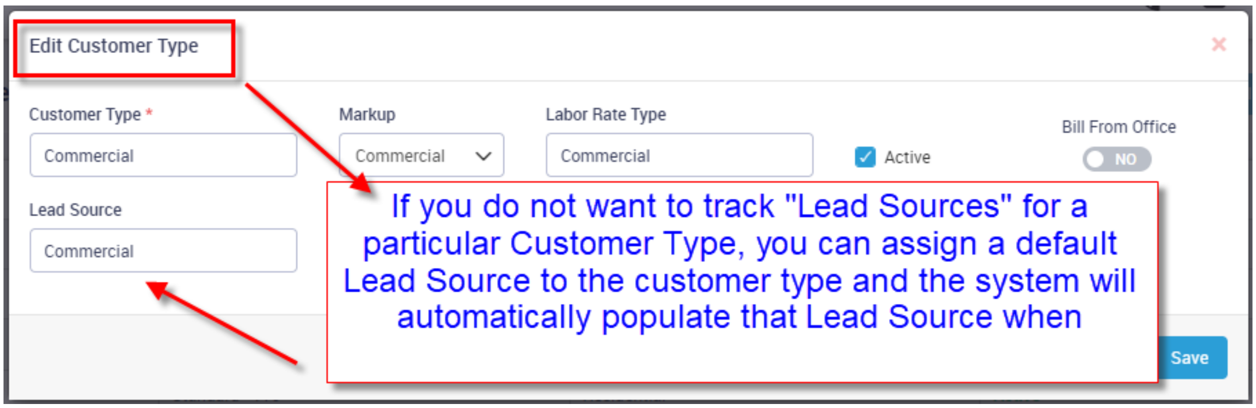






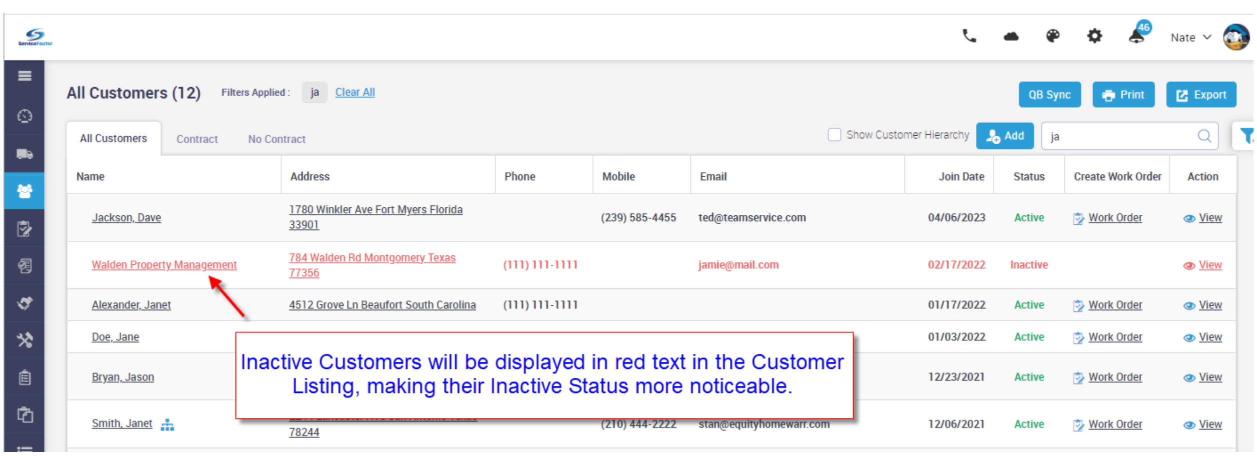
Lead Source – You can now assign a default Lead Source to a Customer Type

One of the powerful features of ServiceFactor is the ability to track where your work is coming from via a Lead Source. Whenever you add a new Work Order, Job, Quote or Service Agreement the system prompts you for a Lead Type in order to track the lead source from where the revenue was generated. If you do not want to manually fill in a Lead Source for specific customer types, such as "Commercial" customers, you can assign a Lead Source to the Customer Type and each time you create a Work Order, Quote, Job or Service Agreement for a customer assigned the particular customer type, the system will automatically fill in the Lead Source that has been assigned to the Customer Type. **NOTE –** If your company is tracking the lead sources from where your revenue is generated, it is not recommended that you use this feature.



Inactive Customers will now show up in RED in the Customer List

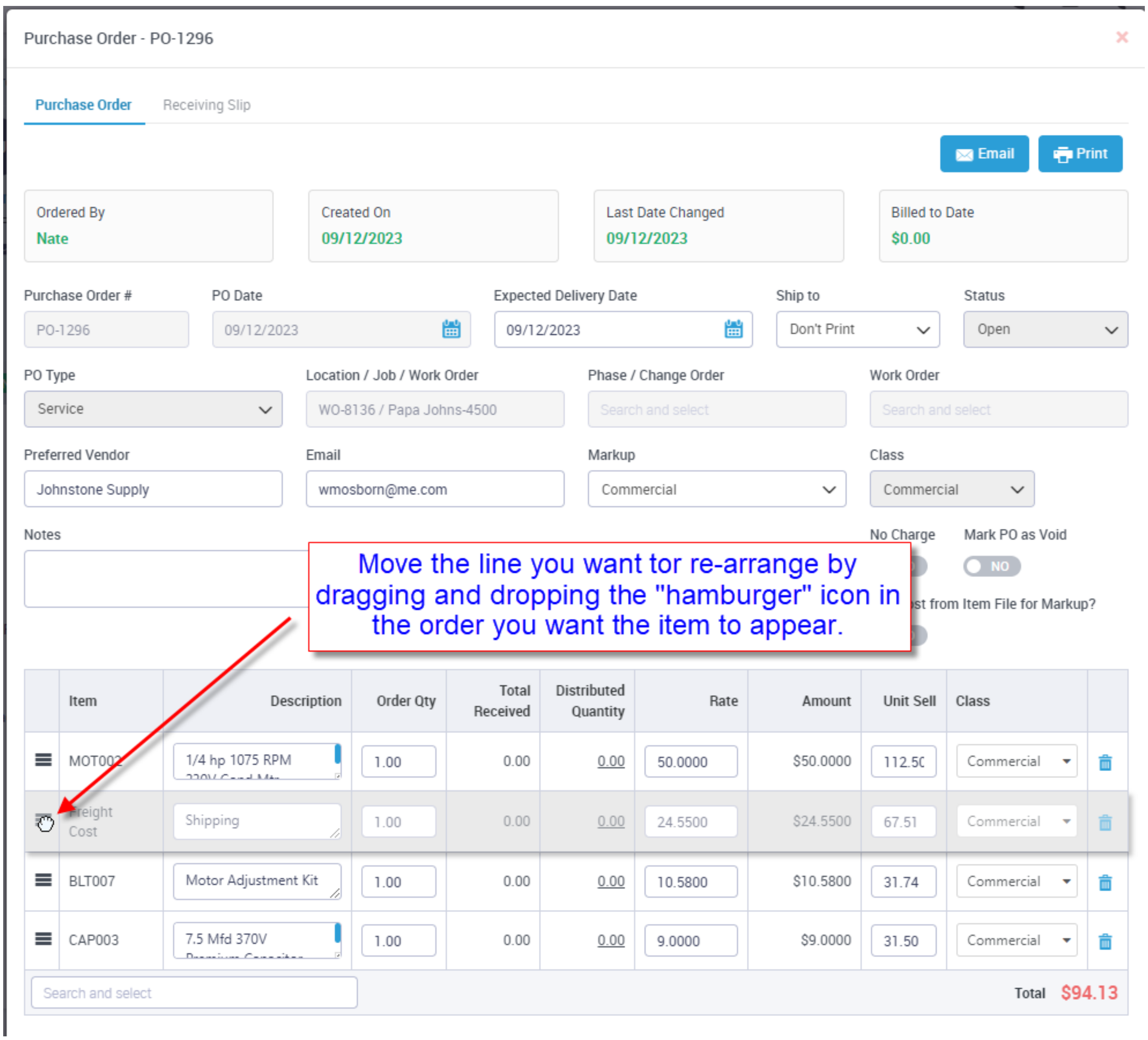
If you inactivate a customer, they will be listed in red in the Customer list. This will make it obvious that the Customer in inactive. **NOTE –** The system has always shown the "Status" in the listing, but it was easy to overlook the status if you were not specifically looking for it.



Purchase Orders – You now have the ability to re-arrange the order of items on a Purchase Order

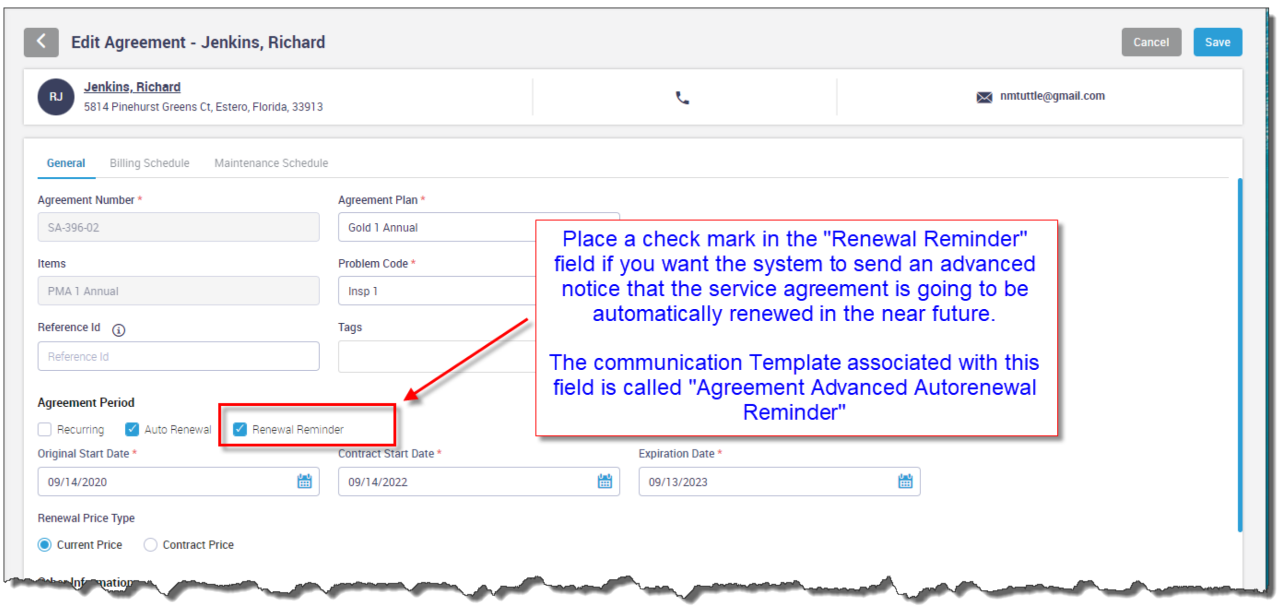
The ability to re-arrange the items on a Purchase Order has been added. This works similar to the way that re-arranging items on an Invoice or Quote works. Simply grab the "hamburger" icon to the left of the line you want to move and drag and drop it in the spot you would like it to appear on the Purchase Order.

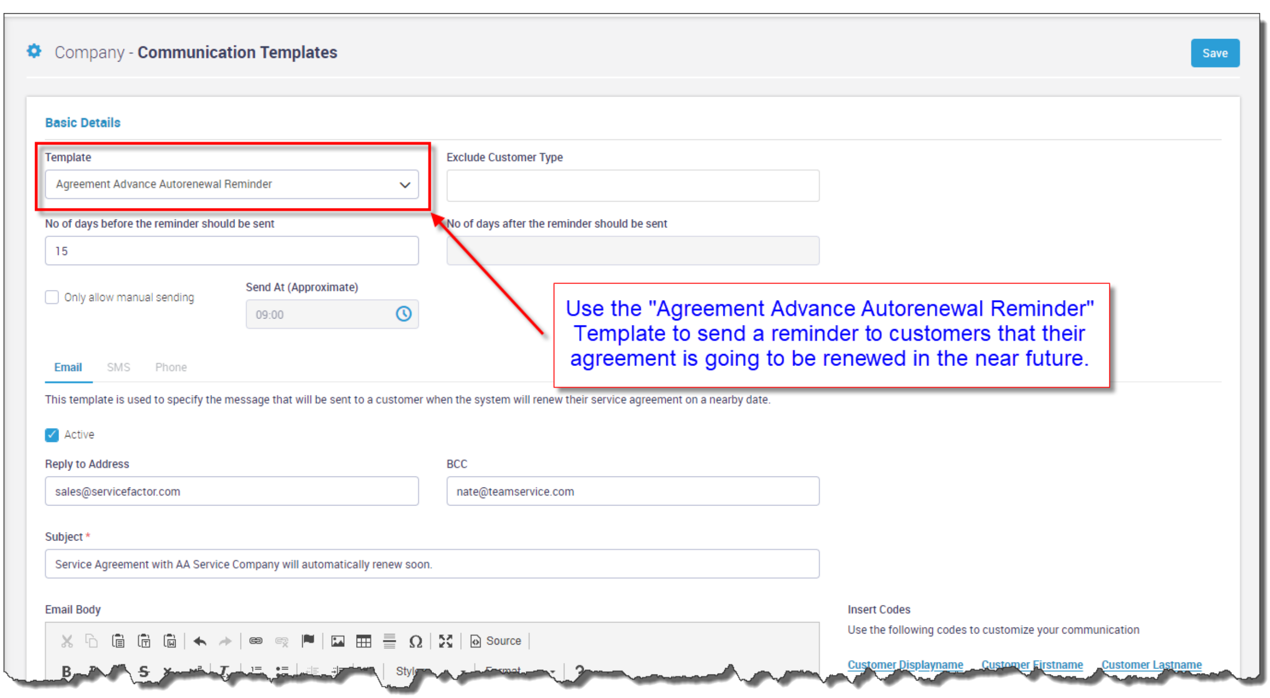
NOTE – Moving the order of the items on a Service PO will not change the order of the items written to the Invoice. If you want to change the order of the items on the Invoice, you will need to re-arrange the items on the Invoice itself.



Communication Template – A new Communication Template has been added that will send out a reminder that a Service Agreement is going to be renewed in the near future

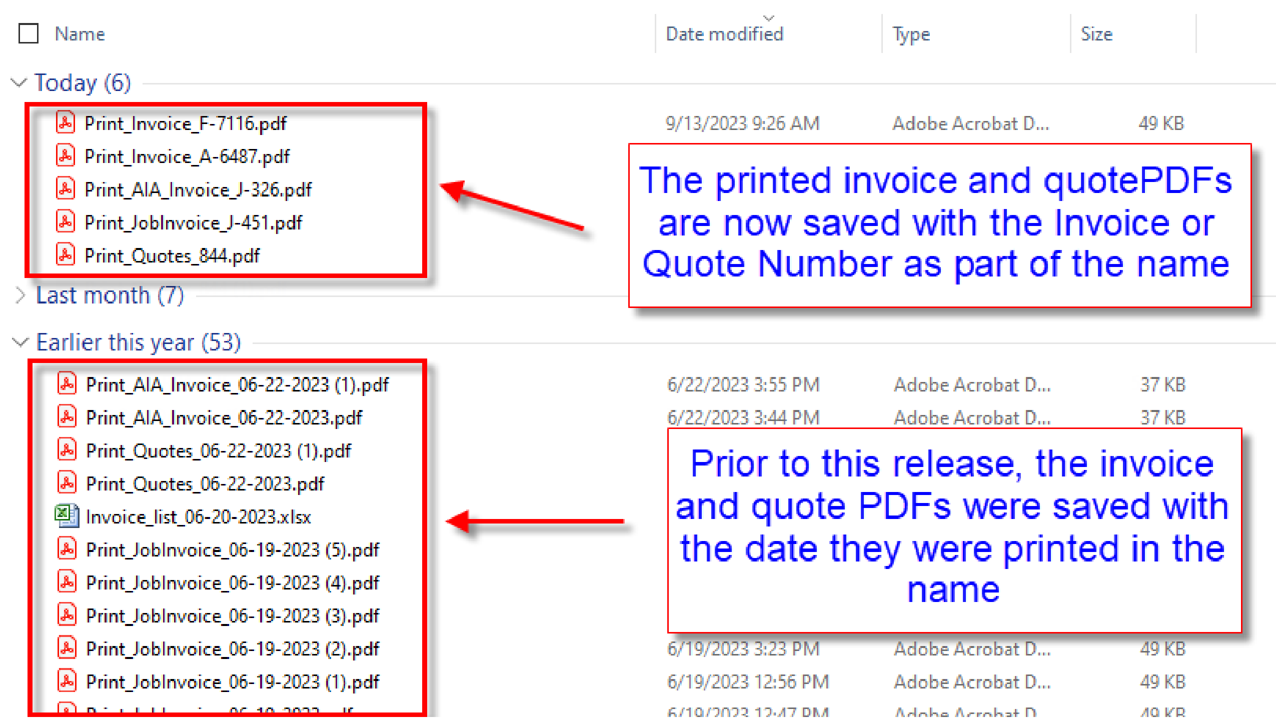
A new "Agreement Advance Auto-renewal Reminder" template has been added to the Communication Templates. This template is designed to send an advanced notice to your customer's letting them know that their service agreement is going to be automatically renewed in the near future. This should eliminate the surprise when they get billed or their credit card gets charged if you are using the Auto Credit Card billing feature. This template will only be sent to customers that you have marked to receive the advanced reminder on the Service Agreement General screen. A good example of when this feature would be used is if you are doing Auto Credit Card billing annually for a service agreement renewal, as opposed to monthly.





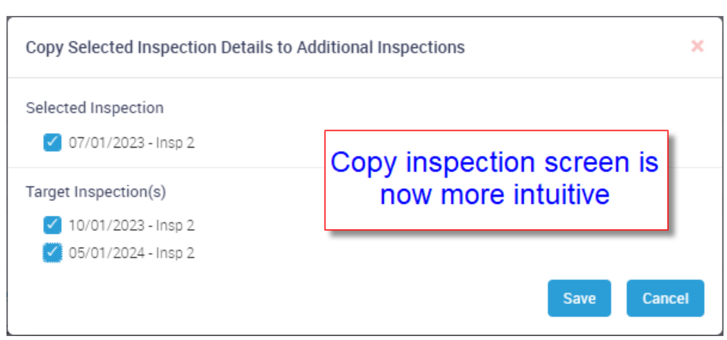
Invoices – When you print an invoice or quote, it will now save the PDF with the invoice or quote number in the name, as opposed to the date

When you print an invoice, the system automatically saves it to your "Downloads" folder as a PDF file. Prior to this update, the system would save the PDF with a name such as "Print_Invoice_09-13-2023.pdf", "Print_Invoice_09-13-2023 (1).pdf", "Print_Invoice_09-13-2023 (2).pdf", etc. If you wanted to move invoices from the downloads folder to somewhere else, it would be difficult to know which invoice you wanted to move without opening the file(s) if you printed multiple invoices for the day. Now when you print invoices from SF, the PDF will be saved with the invoice number in the description, such as "Print_Invoice_F-7116.pdf", Print_Invoice_A-6487.pdf", "Print_AIA_Invoice_J-1432.pdf", "Print_JobInvoice_J-451.pdf", etc.



Service Agreements – Copying an inspection from one month to additional months has been enhanced

When you use the "Copy" feature to copy inspection information from one month to another, the copy screen has been enhanced to show you what month you are copying from and to which months you want to copy to. This should help eliminate confusion.



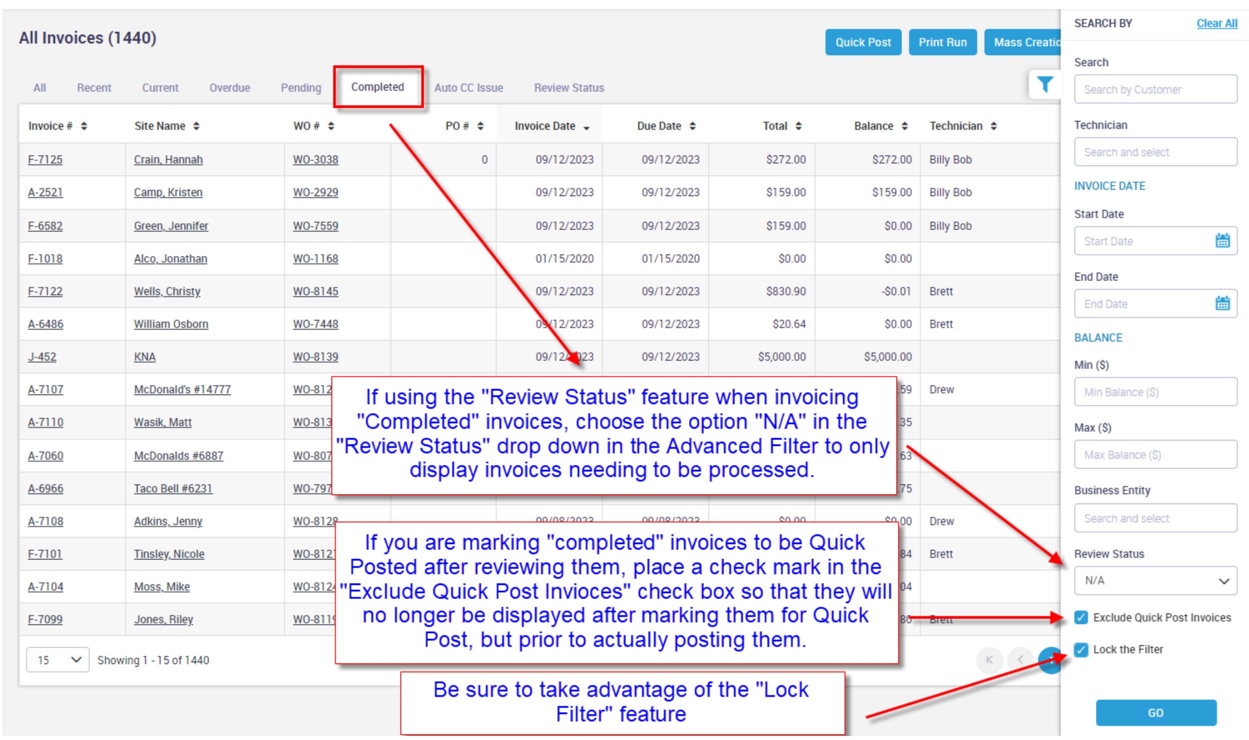
Invoice Listing – “N/A – Not Applicable” Review Status has been added to the Advanced Filter

The “Review Status” option “N/A – Not Applicable” has been added to the Advanced Filter option. If you are using the Review Status feature, you can go into the Advanced Filter and filter by the “N/A” option so that once you have reviewed the invoices and changed the Review Status to “Reviewed”, they will no longer appear in the list. This will eliminate the possibility of going back into invoices that you have already reviewed because they are still showing up on the list.

Invoice Listing – An option to “Exlude Quick Post Invoices” has been added to the Advanced Filter

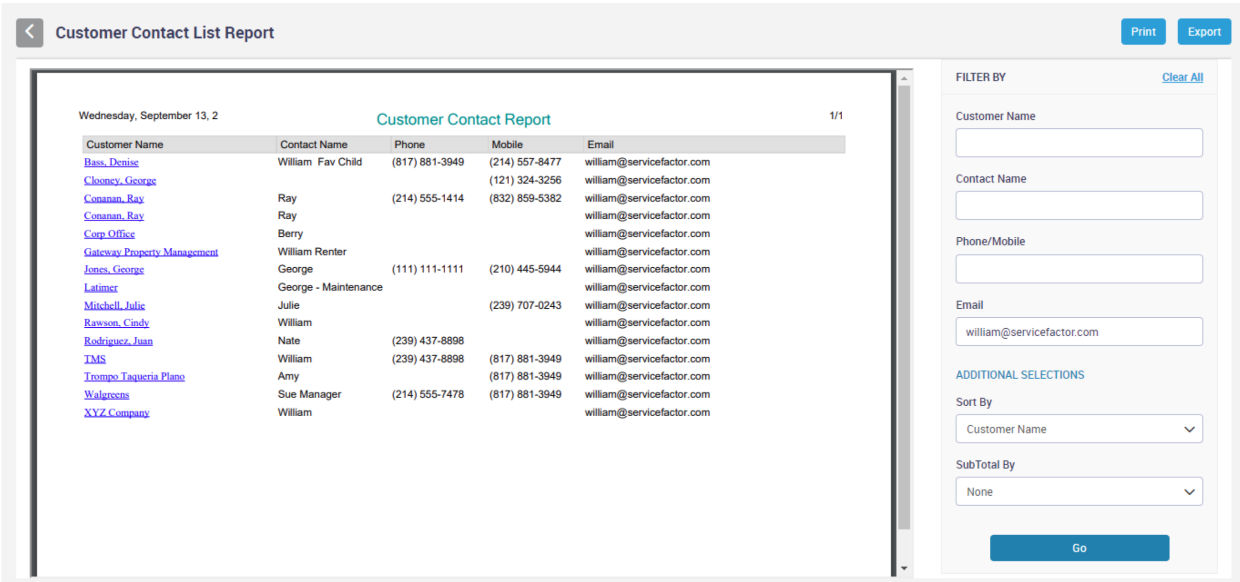
If you are using the Quick Post feature, you can go into the Advanced Filter and filter out any invoices that have been marked for “Quick Post”, but have not yet been posted to Accounting. This will eliminate the possiblility of going back into invoices that you have already reviewed because they are still showing up on the list.

NOTE – when setting the filters mentioned above while verifying invoices, it is recommended that you place a check mark in the “Lock Filter” so that when you go back into the Inivoice Listing, the filter you set remains.



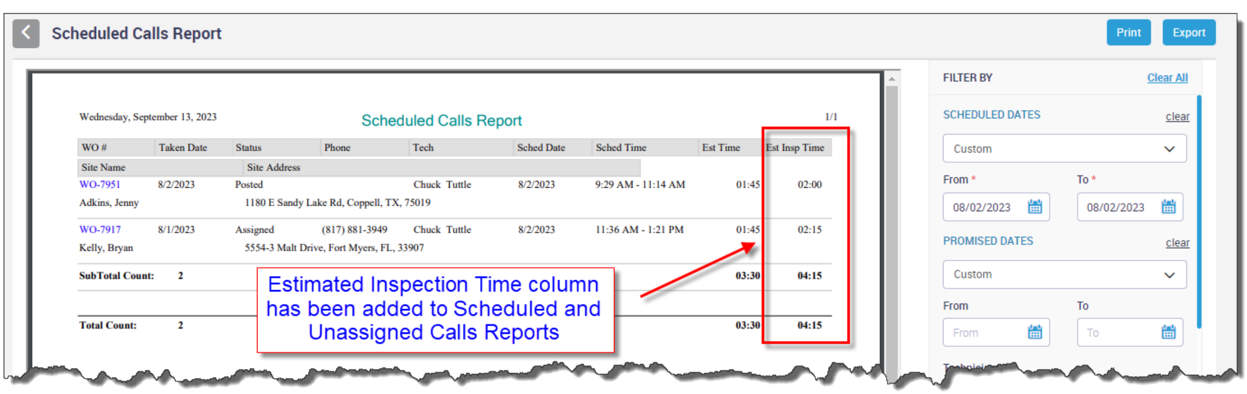
Reports – A new Customer Contact List Report has been added

A new report has been added to the system that will allow you to search for any contacts in the system, whether it be a Primary Contact or a Secondary Contact, by a Phone or Mobile Number, Contact Name or Email Address. This will make it easy to find any records with a specific contact if the contact information changes. For example, if you have a contact associated with many sites and the contact leaves, you can uses this report to find all customers with that contact and drill into each record from the report and make the proper changes.



Reports – Estimated Inspection Time has been added to the Scheduled Calls Report and Unassigned Calls Report

The Estimated Inspection Time has been added to the Scheduled Calls Report and Unassigned Calls Report, which will allow you to review how much overall estimated inspection time will be needed for Inspection Work Orders. The Estimated Inspection time comes from the Maintenance Schedule screen of the Service Agreement.



SF Mobile – Lead Source will be automatically filled in when adding a Work Order if it has been assigned to the Customer Type

If you have assigned a Lead Type to a Customer Type (as mentioned earlier), the lead type will be automatically populated when adding a Work Order for the specific customer type in ServiceFactor Mobile.