

SF Release Notes: October 26, 2023

Dispatch Board – You can now edit the “Problem Reported” from the Work Order Summary Screen.

You can now edit the Problem Reported from the Work Order Summary screen, as opposed to having to drill into the actual Work Order to edit the summary. The changes you make to the Work Order summary will also be reflected in ServiceFactor Mobile.

WO Summary : WO-806

Jacobs, Kevin
JK 5856 Inverness Circle, Fort Myers, Florida, 33903
(817) 881-3949 (239) 437-8898 kevin@mail.com
Tags

WO Details
Copy WO

Agreements
GOLD1M

Problem Code: Res - No Cool
Scheduled Time: 10/25/2023 11:00 AM - 01:00 PM
Call Taken Date/Time: 11/20/2019 03:39 PM
Promised Date/Time: 10/25/2023 10:00 AM - 12:00 PM

Estimated Time: 02:00 hrs
Est. Inspection Time
Priority
Zone: North FM

Technician(s)
Brett

Problem Reported
Thermostat is blank and there is no power to it.

Add Note

Estimated Time: 02:00 hrs
Est. Inspection Time
Priority
Zone: North FM

Technician(s)
Brett

Problem Reported
Thermostat is blank and there is no power to it. Customer called back and said that there is not any water flowing from the outside drain line.

Add Note

Customer Detail Center – You can now toggle between the “Promised Date / Time” and the “Work Order History Summary” in the Work Order Tab

A new Toggle option has been added to the Work Order tab of the Customer Center that will let you toggle between displaying the Promised Date/Time and the WO History Summary.

NOTE – The default option is “Promised Date/Time”. If you change the toggle to display the WO History Summary, it will stay that way until you change it back, or you log out and back into ServiceFactor.

The screenshot shows the Customer Detail Center interface. A 'Toggle' dialog box is open, allowing the user to switch between 'Promised Date/Time' (unselected) and 'WO History Summary' (selected). A red arrow points from the 'Toggle' button in the top right of the Work Order tab to the dialog box. Another red arrow points from the 'WO History Summary' option in the dialog box to the 'WO History Summary' column header in the table below. A text box explains: 'Click the Toggle Button to choose between displaying the Promised Date/Time or the WO History Summary'.

WO #	Problem Code(Duration)	Scheduled Date/Time	Technician	Status
WO-8315	Res - No Cool (2.0) Hrs	10/24/2023 10:00 AM - 12:00 PM		
WO-7688	Call Back (1.0) Hrs			
WO-7687	Res - No Cool (2.0) Hrs			
WO-7669	JC - Install Equipment (1.30) Hrs	06/05/2023 04:00 PM - 06:00 PM	James	Posted
WO-7412	Insp 1 (1.45) Hrs	04/21/2023 10:00 AM - 12:00 PM	Drew	Posted
WO-7382	Res - No Cool (2.0) Hrs	04/13/2023 05:14 PM - 07:14 PM	Brett	Completed

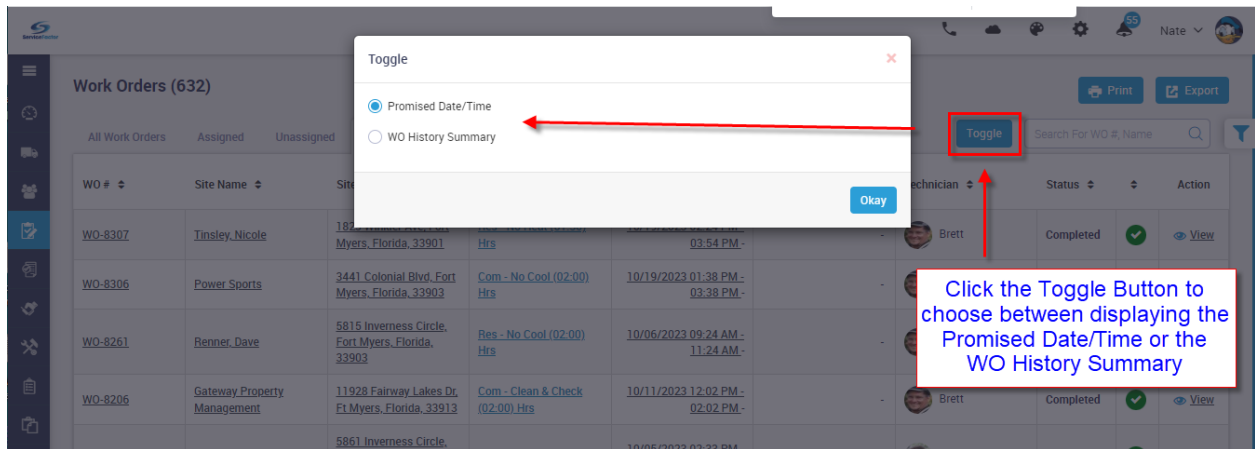
The screenshot shows the Customer Detail Center interface with the 'Work Orders' tab selected. The 'Toggle' button is visible in the top right corner of the Work Orders section. A red box highlights the 'WO History Summary' column header, and a red arrow points from the 'Toggle' button to it. A text box explains: 'The Toggle will let you view either the Promised Date/Time or the WO History Summary in this column'.

WO #	Problem Code(Duration)	WO History Summary	Scheduled Date/Time	Technician	Status
WO-8315	Res - No Cool (2.0) Hrs		10/25/2023 11:00 AM -	1 - On Hold	Assigned
WO-7688	Call Back (1.0) Hrs	Replaced capacitor	08/23/2023		
WO-7687	Res - No Cool (2.0) Hrs	Replaced motor	06/12/2023		
WO-7669	JC - Install Equipment (1.30) Hrs		06/05/2023		
WO-7412	Insp 1 (1.45) Hrs	Performed 15 Point Tune Up	04/28/2023 12:09 PM - 01:54 PM	Drew	Posted
WO-7382	Res - No Cool (2.0) Hrs	Replaced transformer and belt	04/13/2023 05:14 PM - 07:14 PM	Brett	Completed

Work Order Listing - You can now toggle between the “Promised Date / Time” and the “Work Order History Summary” in the Work Order Listing Screen

A new Toggle option has been added to the Work Order Listing that will let you toggle between displaying the Promised Date/Time and the WO History Summary.

NOTE – The default option is “Promised Date/Time”. If you change the toggle to display the WO History Summary, it will stay that way until you change it back, or you log out and back into ServiceFactor.



Work Orders (632)

All Work Orders Assigned Unassigned **Completed** Posted Canceled

Print Export

Toggle Search For WO #, Name

WO #	Site Name	Site Address	Problem Code	Scheduled Date/Time	Promised Date/Time	Technician	Status	Action
WO-8307	Tinsley, Nicole	1823 Winkler Ave, Fort Myers, Florida, 33901	Res - No Heat (01:30) Hrs	10/19/2023 02:24 PM - 03:54 PM		Brett	Completed	View
WO-8306	Power Sports	3441 Colonial Blvd, Fort Myers, Florida, 33903	Com - No Cool (02:00) Hrs	10/19/2023 01:38 PM - 03:38 PM		Brett	Completed	View
WO-8261	Renner, Dave	5815 Inverness Circle, Fort Myers, Florida, 33903	Res - No Cool (02:00) Hrs	10/06/2023 09:24 AM - 11:24 AM		Brett	Completed	View
WO-8206	Gateway Property Management	11928 Fairway Lakes Dr, Ft Myers, Florida, 33913	Com - Clean & Check (02:00) Hrs	10/11/2023 12:02 PM - 02:02 PM		Brett	Completed	View

Work Orders (632)

All Work Orders Assigned Unassigned **Completed** Posted Canceled

Print Export

Toggle Search For WO #, Name

WO #	Site Name	Site Address	Problem Code	Scheduled Date/Time	WO History Summary	Technician	Status	Action
WO-8307	Tinsley, Nicole	1823 Winkler Ave, Fort Myers, Florida, 33901	Res - No Heat (01:30) Hrs	10/19/2023 02:24 PM - 03:54 PM	Replaced thermostat and transformer	Brett	Completed	View
WO-8306	Power Sports	3441 Colonial Blvd, Fort Myers, Florida, 33903	Com - No Cool (02:00) Hrs	10/19/2023 01:38 PM - 03:38 PM	Replaced thermostat and filters	Brett	Completed	View
WO-8261	Renner, Dave	5815 Inverness Circle, Fort Myers, Florida, 33903	Res - No Cool (02:00) Hrs	10/06/2023 09:24 AM - 11:24 AM	Replaced aquastat	Brett	Completed	View
WO-8206	Gateway Property Management	11928 Fairway Lakes Dr, Ft Myers, Florida, 33913	Com - Clean & Check (02:00) Hrs	10/11/2023 12:02 PM - 02:02 PM	Performed 15 point tune up	Brett	Completed	View

Work Order Listing – A Hyperlink has been added to the Problem Code

You can now click on the Problem Code in the Work Order listing to view the Problem Reported details. This should save time from having to drill into the work order to view the details of the problem being reported.

The screenshot shows a 'Work Orders (632)' interface. At the top, there are tabs for 'All Work Orders', 'Assigned', 'Unassigned', 'Completed', 'Posted', and 'Canceled'. A search bar and 'Toggle' button are also present. The main table lists work orders with columns for 'WO #', 'Site Name', 'Site Address', 'Problem Code', 'Scheduled Date/Time', 'WO History Summary', 'Technician', 'Status', and 'Action'. A callout box with the text 'Click on the Problem Code to view the Problem Reported details on a Work Order' points to the 'Res - No Heat (01:30) Hrs' link in the 'Problem Code' column of work order WO-8307. A modal window for WO-8307 is open, showing the 'Problem Code: Res - No Heat (01:30) Hrs' and the 'Problem Reported:' details: 'Hardly any air is coming out of the vents and the air coming out is cool, not hot.'

Work Order Tab in Customer File - A Hyperlink has been added to the Problem Code

You can now click on the Problem Code in the Work Order tab of the Customer Center to view the Problem Reported details. This should save time from having to drill into the work order to view the details of the problem being reported.

The screenshot shows the 'Customer Center' interface. At the top, there are navigation tabs: 'Timeline', 'Work Orders', 'Equipment', 'Agreements', 'Invoice', and 'Quotes'. The 'Work Orders' tab is selected and highlighted with a red box. Below the navigation, the 'Work Orders' section displays a table with columns for 'WO #', 'Problem Code(Duration)', 'Technician', and 'Status'. A callout box with the text 'Click on the Problem Code in the Work Orders tab to view the Problem Reported details on a Work Order' points to the 'Res - No Heat (1:30) Hrs' link in the 'Problem Code(Duration)' column of work order WO-8307. A modal window for WO-8307 is open, showing the 'Problem Code: Res - No Heat (1:30) Hrs' and the 'Problem Reported:' details: 'Hardly any air is coming out of the vents and the air coming out is cool, not hot.'

Work Orders – Timesheet Tab now allows you to sort by Technician or Start Date

The timesheet will now allow you to sort by the Technician or the Start Date. If you sort by the technician, it will sort first by technician, then start date/time and finally by status. If you sort by the Start Date, it will sort by start date/time, then status and finally by technician.

NOTE – Clicking the Technician or the Start Date header a second time will do a reverse order sort, starting with the most recent date or the technician’s name in reverse alphabetical.


The screenshot shows the Timesheet interface with a dark blue header bar containing navigation tabs: Timeline, Timesheet, Invoice, Payments, Quote, and Purchase Order. Below the header, there are summary cards for Total hrs (3.74), Working hrs (2.74), and Traveling hrs (1.00). The main table has columns: Technician, Status, Start Date, Start Time, End Date, End Time, Class, Total, and Overtime. Red boxes highlight the Technician and Start Date headers, with arrows pointing to a callout box that says "You now have the option to sort the Timesheet Screen by Technician or Start Date".

Technician	Status	Start Date	Start Time	End Date	End Time	Class	Total	Overtime
Billy B...	Traveling	10/23/2023	08:43 AM	10/23/2023	09:10 AM	Residential:Maintenance	0.45 hrs	NO
Billy B...	Working	10/23/2023	09:10 AM	10/23/2023	09:58 AM	Residential:Maintenance	0.80 hrs	NO
Chuck...	Traveling	10/24/2023	08:15 AM	10/24/2023	08:48 AM	Residential:Maintenance	0.55 hrs	NO
Chuck...	Working	10/24/2023	08:48 AM	10/24/2023	10:44 AM	Residential:Maintenance	1.94 hrs	NO

Invoices - You now have the Ability to Display the “Technician’s Dispatch Dates” in the Body of the Invoice

A new feature has been added to the System that will allow you to define an “Item” that when selected on an invoice, it will bring over the Technician’s Dispatch Date(s) from the Timesheet screen to the Description field on the Invoice. The information it will display is the Work Date(s) and the Technician(s) Name(s). The Qty Field, Price and Amount columns will be blank for the Technician Dates on the printed invoice.

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print						
	SF Tech Date	<table border="1"> <tr> <th>Date</th> <th>Tech</th> </tr> <tr> <td>10/23/2023</td> <td>Billy Bob</td> </tr> <tr> <td>10/24/2023</td> <td>Chuck Tuttle</td> </tr> </table>	Date	Tech	10/23/2023	Billy Bob	10/24/2023	Chuck Tuttle	1.00	0.00	0.00	<input type="radio"/> NO	<input type="text" value="Search and select"/>	Residential	<input checked="" type="radio"/> YES
Date	Tech														
10/23/2023	Billy Bob														
10/24/2023	Chuck Tuttle														



AA Service
11928 Fairway Lakes Drive
Fort Myers, FL 33013
(817) 881-3949
sales@teamservice.com
FL12345

Invoice

Invoice Date:	10/25/2023
Invoice No:	A-7170
Due Date:	10/25/2023
Sales Rep:	
Customer PO:	
Work Order No.	WO-8195

Bill To Address

Erin Krueger
123 Hill Street
Plano, TX 75023

Site Address

Erin Krueger
123 Hill Street
Plano, TX 75023

Description	Qty	Price (\$)	Amount (\$)						
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>Date</th> <th>Tech</th> </tr> <tr> <td>10/23/2023</td> <td>Billy Bob</td> </tr> <tr> <td>10/24/2023</td> <td>Chuck Tuttle</td> </tr> </table>	Date	Tech	10/23/2023	Billy Bob	10/24/2023	Chuck Tuttle			
Date	Tech								
10/23/2023	Billy Bob								
10/24/2023	Chuck Tuttle								
Regular Time Labor @ \$150 per hour	3.75	127.50	478.13						
1/4 hp 1075 RPM 230V Cond Mtr	1.00	160.00	160.00						
7.5 MFD 370V Electrical Distributor	1.00	42.25	42.25						
Sub Total			\$680.38						
Tax (0.0000 %)			\$0.00						
Total			\$680.38						

As a Value Club Member, you saved \$120.07 today. Thank you for being a Value Club Member.

Message

LIMITED WARRANTY: All materials, parts, and equipment are warranted by the manufacturers' or suppliers' written warranty only. All labor performed by the above-named company is warranted for 30 days or as otherwise indicated in writing. The above-named company makes no other warranties, express or implied, and its agents or technicians are not authorized to make any such warranties on behalf of the above-named company. Signature: _____

Invoices – WO History Summary Text added automatically when a Service Agreement Invoice is generated

The system will automatically fill out the WO History Summary with the text of “Service Agreement Invoice Only Invoice” when a Service Agreement Invoice is automatically generated.

The screenshot shows an invoice form with various fields and sections. The 'Work Order History Summary' field is highlighted with a red box and contains the text 'Service Agreement Invoice Only Invoice'. Other fields include 'Bill To' (Acevado, Ram), 'Invoice #' (A-7291), 'Bill To Address' (11120 Everest Dr, Venus, Texas, 76084), 'Terms' (Due on receipt), 'Invoice Date' (10/25/2023), and 'Due Date' (10/25/2023). There are also sections for 'Customer PO #', 'Sales Rep', 'Markup' (Standard - 110), 'Class' (Residential), 'Business Entity', 'Use Tax', 'Call Back', 'Original Work Order', 'Allow To Pay Bill Online', 'Hide from Customer Portal', 'Print Equipment', and 'Hide Prices'.

Items – A new tab has been added for ‘Service Items’

A new tab has been added to the Items Listing that will list the ‘Service Items’.

The screenshot shows the 'Items (133)' listing page. The 'Service Items' tab is highlighted with a red box. A callout box points to the 'Service Items' tab with the text 'A Service Items tab has been added to the Items Listing'. The table below shows the following items:

Name	Sales Description	Category	Price	Item Type	Qty Available	Reorder Point	On Order	Status	Actions
PMA 1 Annual	Annual Service Agreement 1 System	PMA Annual	\$ 190.00	Service				Active	View
SF Tech Time	Use this option to list technician time on invoice		\$ 0.00	Service				Active	View
SF Tech Date	Use this option to list technician work dates on invoice		\$ 0.00	Service				Active	View

Service Agreements – You can now edit the Service Agreement Spiff Amount

The Spiff Amount fields have been opened up so that they can be modified if you do not always pay a fixed amount on a specific service agreement type.

Edit Agreement - Jett, Rex [Cancel] [Save]

Jett, Rex
11411 Rosemount Drive, Fort Myer, Florida, 33913
sue@email.com

General | Billing Schedule | Maintenance Schedule

Current Price Contract Price

Other Informations

Lead Source * Customer PO # Clear PO# on Renewal Taxable

Tax Group * Change Bill To

Business Entity Total Estimated Hours

Commission

Sales Person Renewed Date

Spiff Sales Commission(\$) Renewal Commission(\$)

You can now edit the Spiff Amounts on Service Agreements

Service Agreements – You can now calculate spiffs based on a percentage

The option to calculate Service Agreement Spiffs (commissions) based on a percentage has been added to the Service Agreements. There is now a drop down to determine if you want the spiff to be a fixed amount or based on a percentage.

Edit Agreement - Jett, Rex [Cancel] [Save]

Jett, Rex
11411 Rosemount Drive, Fort Myer, Florida, 33913
sue@email.com

General | Billing Schedule | Maintenance Schedule

Current Price Contract Price

Other Informations

Lead Source * Customer PO # Clear PO# on Renewal Taxable

Tax Group * Change Bill To

Business Entity Total Estimated Hours

Commission

Sales Person Renewed Date

Spiff Sales Commission(%) Renewal Commission(%) Sales Commission(\$) Renewal Commission(\$)

Use the Dropdown to choose between Amount or Percentage for calculating Commission

Equipment File – Equipment History Screen has been added

A new History Screen has been added to the Equipment File that will display all of the history for the piece of equipment along with the sell price. This will make it quick and easy to see all items added against a piece of equipment, as well as the amount the customer has spent on the equipment.

View Equipment Edit

Baker, John
4545 Pinehurst Greens Ct, Estero, Florida, 33913
nmtuttle@earthlink.net

Keyword Search
2023 Add Notes

02/03/2020
ac001 was created Note
12:56 PM

Equipment Information

Equipment Id * ac001 Model No. TEM8A0B24 Serial No. 74747585

Brand Trane Equipment Type Air Handler Model Year 2012

Location Side of hp Equipment Of Search and select

Installed

Installation Date Labor Warranty Parts Warranty

Tacs

History

Click the History link in the Equipment File to see the history associated with the piece of equipment

Equipment History Print

Baker, John
4545 Pinehurst Greens Ct, Estero, Florida, 33913

Equip ID: ac001 Serial #: 74747585 Model: TEM8A0B24 Brand: Trane Model Year: 2012 Equipment Type: Air Handler

History

Date	WO #	Lead Tech	Item Name	Item Description	Qty	Price	Total Sell
10/02/2023	WO-8247	Drew	DIA110010	30 minute diagnostic	1.00	75.47	75.47
10/02/2023	WO-8247	Drew	CON110015	Replace 1/4 HP 1075 RPM 230V Condenser Fan Motor	1.00	402.30	402.30
10/02/2023	WO-8247	Drew	DIS110000	Replace 30 Amp Single Phase Disconnect - Pullout Type	1.00	312.90	312.90
06/19/2023	WO-6040	Brett	AIR003	Air Vent, 1/8" Model #67	1.00	89.21	89.21
02/03/2020	WO-1342	Nate	BLW110005	Replace 1/4 HP 1075 RPM 230V 3 Speed Blower Motor	1.00	507.00	507.00
02/03/2020	WO-1342	Nate	CAP004	10 Mfd 370V Premium Capacitor	1.00	23.38	23.38

Item Count: 6 Total items associated with the Equipment Total Sell Price for items Total Sell: 1410.26

Click WO # to drill into the Work Order

Roles and Permissions – You can now permission out the different sections of the Settings Menu

Roles/Permissions - Edit Cancel Save

Role List +

- Admin
- Dispatcher
- Nate
- Office Manager
- Tech

Role Name * Reset password Delete Role

Modules	All	View	Add	Edit	Delete	Print	Export
Service Agreements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Settings - Accounting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Settings - Company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Settings - Customer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Settings - Employee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Settings - Equipment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Settings - Inventory	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Settings - Misc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Settings - Workorder	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Time Sheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

New permissions have been added for each individual Settings Section as opposed to the overall Settings

Time Entries – You can now give permission to just the Time Entry Screen without giving permission to the Employee file

You can now give permissions to just the Time Entry Screen without giving permission to the Employee file. This will allow an employee the ability to review and modify time entries without having permission to the full employee file. This will require giving permission to the Employee List and the Time Sheet and removing permission from the Employee File.

Time Entries - Chuck Tuttle RT Hrs- 10.08 OT Hrs- 0.00 Total Hrs- 10.08 Print Export

From To Go Adjust to Overtime QB Sync Add

Date	Description	Start Time	End Time	Duration (Hrs)	Duration (Hrs:Mins)	Accumulated RT (Hrs:Mins)	Accumulated OT (Hrs:Mins)	Overtime	Class	Actions
10/23/2023	Traveling at WO-1472	08:34 AM	08:49 AM	0.25	00:15	00:15	00:00	<input type="checkbox"/> NO	Commercial:Service	✎ 🗑️
10/23/2023	Working at WO-1472	08:49 AM	04:10 PM	7.35	07:21	07:36	00:00	<input type="checkbox"/> NO	Commercial:Service	✎ 🗑️
10/24/2023	Traveling at WO-8195	08:15 AM	08:48 AM	0.55	00:33	08:09	00:00	<input type="checkbox"/> NO	Residential:Maintenance	✎ 🗑️
10/24/2023	Working at WO-8195	08:48 AM	10:44 AM	1.93	01:55	10:04	00:00	<input type="checkbox"/> NO	Residential:Maintenance	✎ 🗑️

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Communication Template – A new Work Order Booking Confirmation has been added

A new Work Order Booking Confirmation template has been added that will send out an email and/or text confirmation whenever a Regular Work Order, Service Agreement Work Order or Quote Work Order is created. Project Management Work Orders and Automatically Created Service Agreement Work Orders will not send a confirmation.

Company - Communication Templates Save

Basic Details

Template: Workorder Booking Confirmation

No of days before the reminder should be sent: No of days after the reminder should be sent:

Only allow manual sending Send At (Approximate): 09:00

Email SMS Phone

This template is used to specify the message that will be sent to a customer when a new work order is created.

Active

Reply to Address: BCC:

Subject *:

Email Body

Dear [_customer_displayname_],

This email confirms kthat your work order number [_workorder_number_] has been booked for [_workorder_address_single_line_]. If you have any questions regarding your upcoming service, please do not hesitate to contact AA Service at (239) 437-8898.

Insert Codes
Use the following codes to customize your communication

- [Customer Displayname](#) [Customer Firstname](#)
- [Customer Lastname](#) [Customer Companyname](#)
- [Customer Since](#) [Customer Phone](#) [Customer Email](#)
- [Workorder Number](#) [Workorder Address](#)
- [Workorder Address Single Line](#)

Company - Communication Templates Save

Basic Details

Template: Workorder Booking Confirmation

No of days before the reminder should be sent: No of days after the reminder should be sent:

Only allow manual sending Send At (Approximate): 09:00

Email SMS Phone

This template is used to specify the message that will be sent to a customer when a new work order is created.

Active

SMS Message

Dear [_customer_displayname_],

This text confirms that your work order number [_workorder_number_] has been booked for [_workorder_address_single_line_]. If you have any questions regarding your upcoming service, please do not hesitate to contact AA Service at (239) 437-8898.

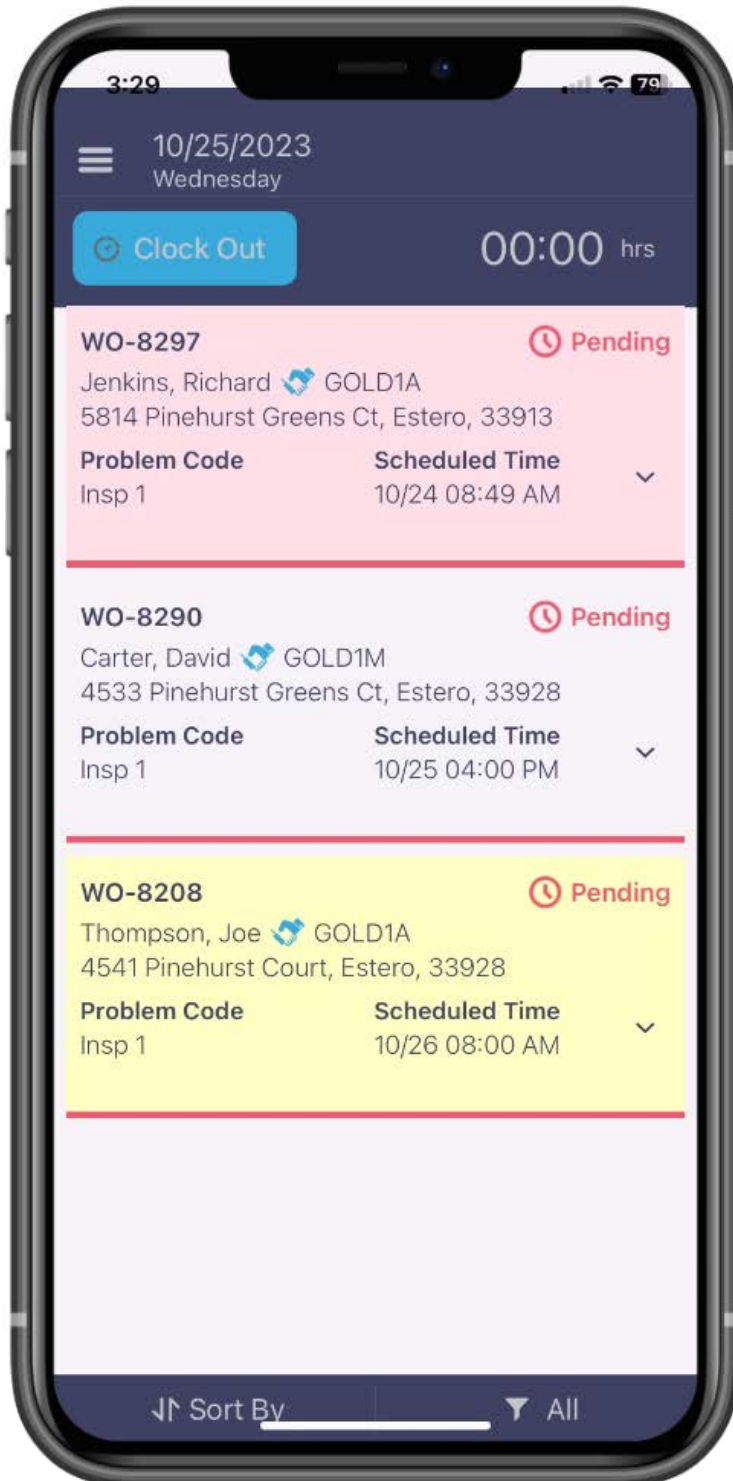
AA Service Company

Insert Codes
Use the following codes to customize your communication

- [Customer Displayname](#) [Customer Firstname](#)
- [Customer Lastname](#) [Customer Companyname](#)
- [Customer Since](#) [Customer Phone](#) [Customer Email](#)
- [Workorder Number](#) [Workorder Address](#)
- [Workorder Address Single Line](#)

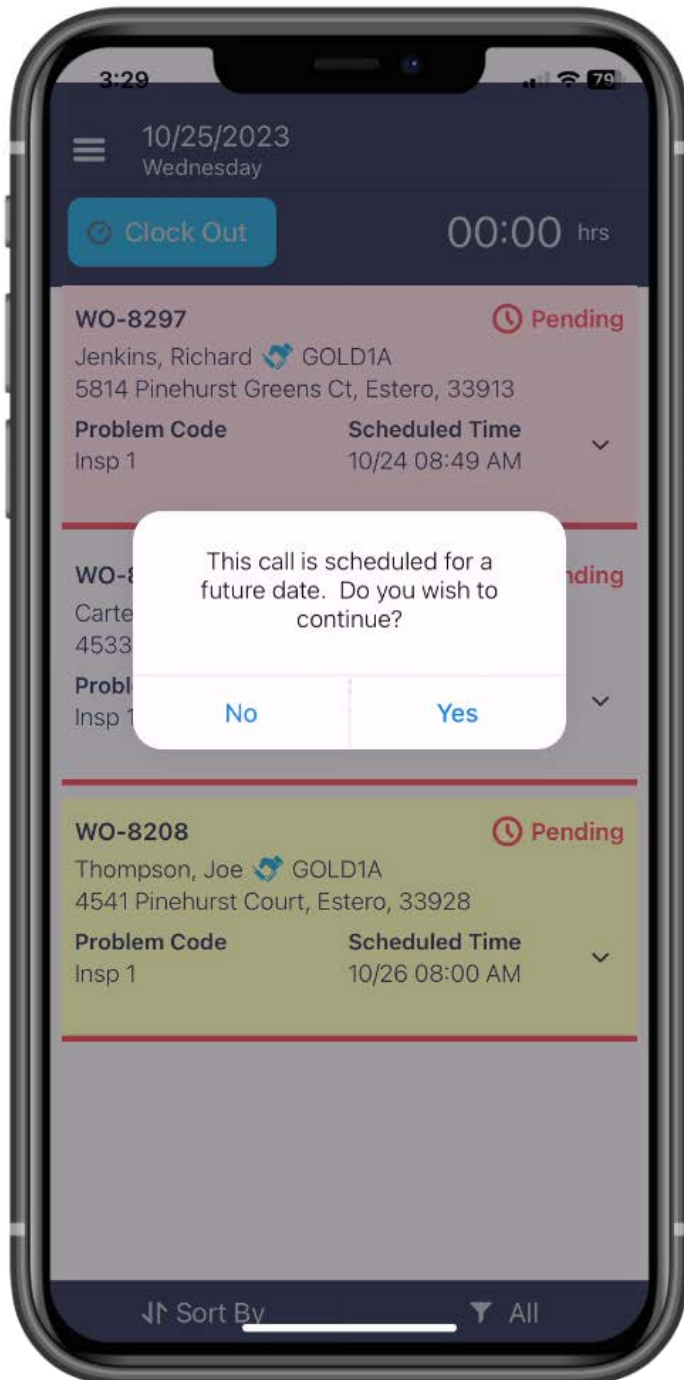
ServiceFactor Mobile – Work Order Listing will now be color coordinated based on the scheduled date of the Work Order

The Work Order Listing screen will now show work orders scheduled for prior dates with a red background, work orders scheduled for the current date with a white background and work orders scheduled for a future date with a yellow background. This should help eliminate technicians accidentally going to a call for a future date.



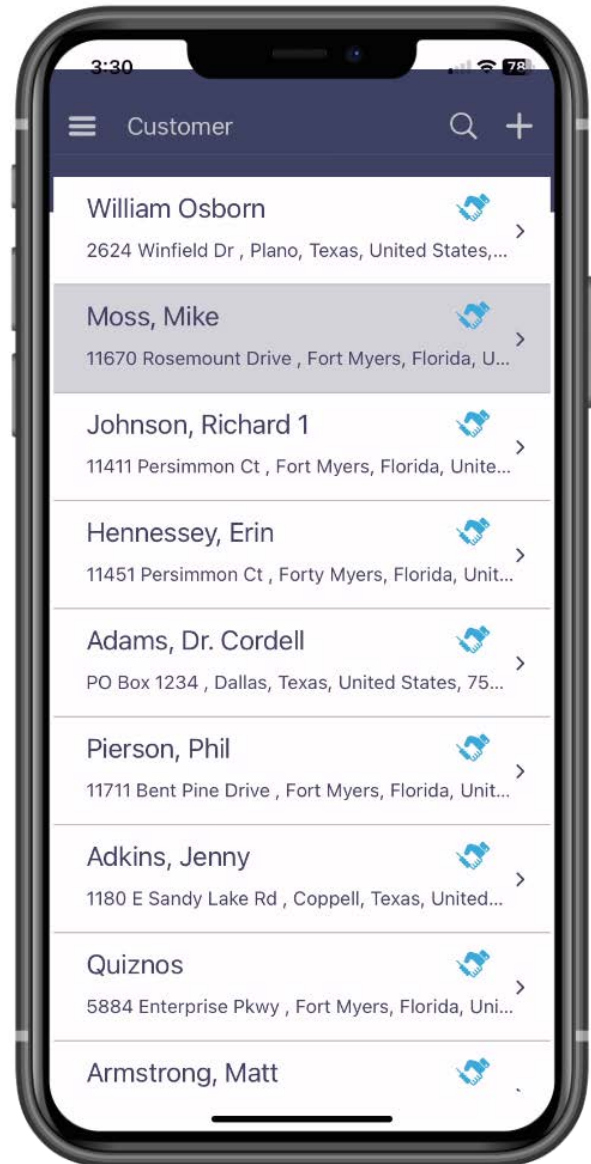
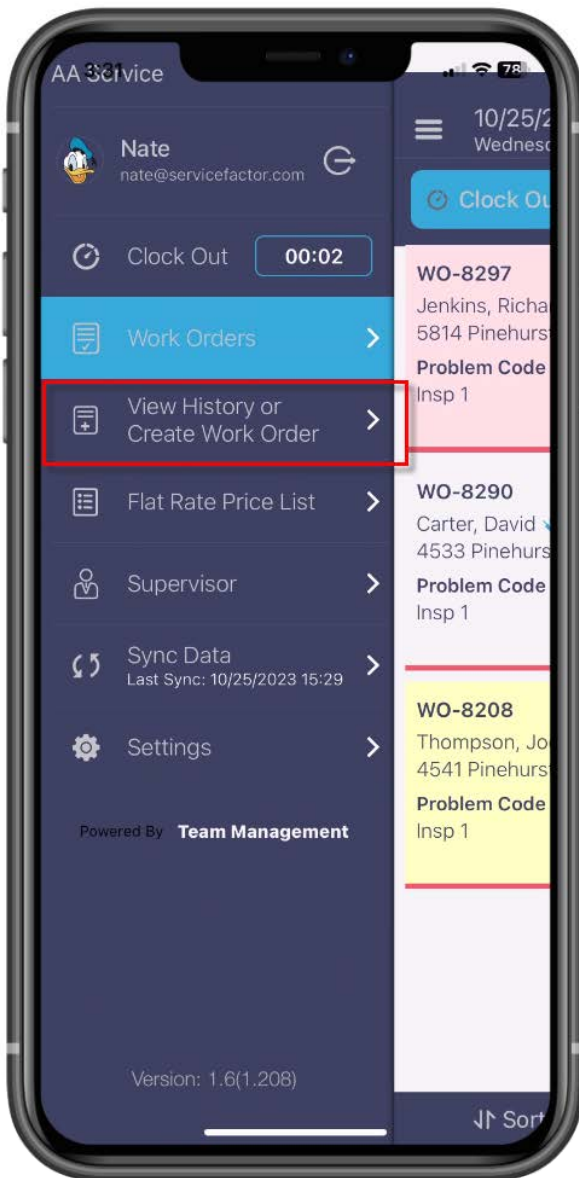
ServiceFactor Mobile – If a technician tries to select a call for a future date, a warning message will appear

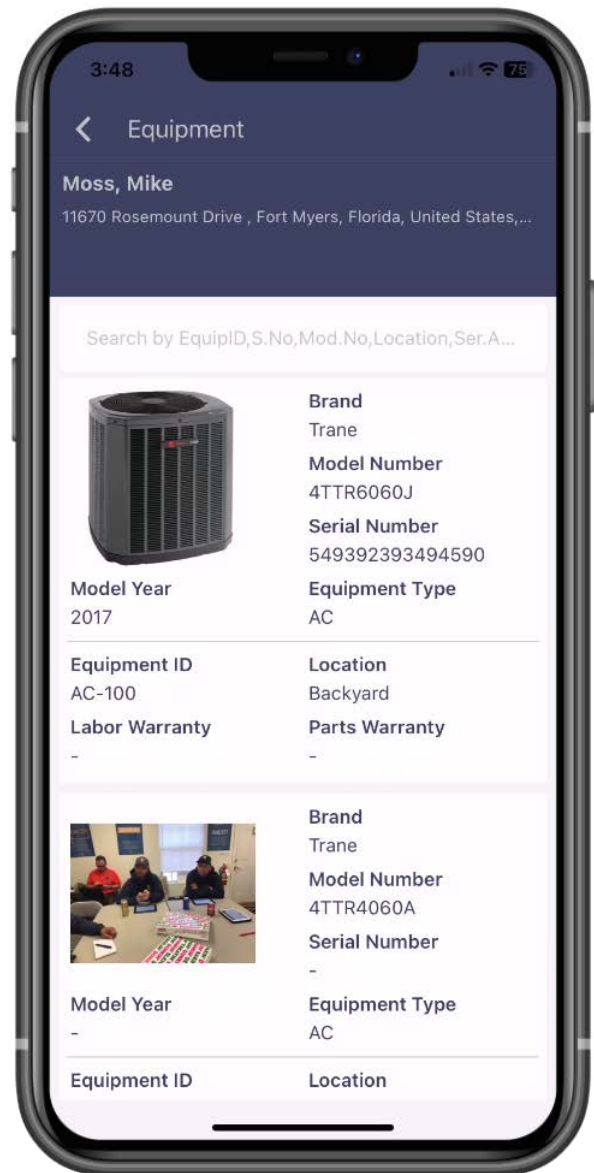
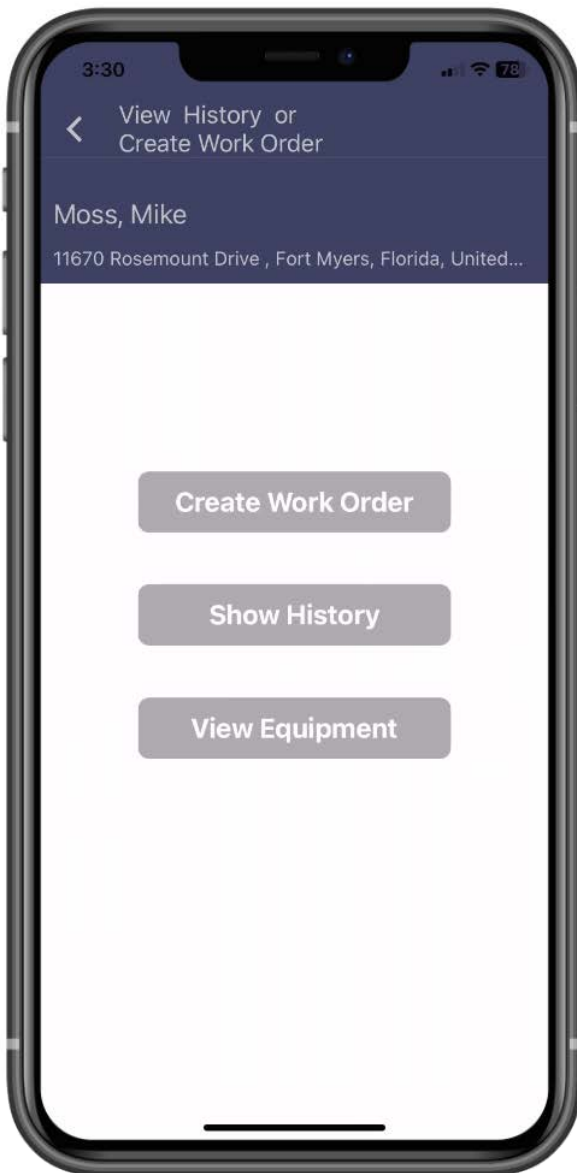
In addition to work orders scheduled for a future date having a yellow background, it will also display a warning if a technician selects it to verify that they want to continue. This in addition to the yellow background should eliminate technicians from running a call that is scheduled for a future date.



ServiceFactor Mobile – You can now view a customer’s equipment without having to add a Work Order

Technicians with Full user permissions can now view customer equipment without having to add a Work Order. The “View History or Create Work Order” option now includes the ability to view equipment. When the tech chooses this option, they can search for the customer and will have the option to Create Work Order, Show History or View Equipment. If they elect to View Equipment, the customer’s Equipment will be displayed. After viewing the equipment, the tech can go back to create a Work Order or view history if needed.





SF Mobile – The logic behind the number of Work Orders a tech can download has been enhanced

The logic behind the number of work orders that a technician can download on SF Mobile has been enhanced. Prior to this release, if the technician exceeded the number of open work orders they can download from a prior date, the system would not download any calls for the current date. Now if the tech exceeds the number of open calls on a prior date, the system will still download the next open work order for the current date. Also, if the technician downloads work orders from future dates that would have exceeded their maximum number of work orders, the system will still download the next open call for the current date. This should eliminate the need to allow the technician to download more calls than you prefer in order to accommodate for work orders that may still be open from prior dates.