

# **System Update Bulletin February 2021**

## **Index**

### **New Features**

1) Announcement Bar.....	P2
2) Search expansion on Audit Files.....	P2
3) TicketFlow ticket linked to Quote and Job Card.....	P2
4) Recurring Job Card Scheduling.....	P2
a) Exclude / Include Weekends option	
b) New Scheduling tools	
i) Four Weekly cycle	
ii) Custom Date selector	
5) Edit Line Item Description on Quote, Job Card or Invoice.....	P5
6) Edit date on Invoice.....	P6
7) Pesticide usage list in the Audit File is now printable.....	P6
8) Sub-Contact Identification Icon added to the Leads List.....	P7
9) Email integration for Customer Support Tickets.....	P7
10) Send quotes to multiple email addresses.....	P7

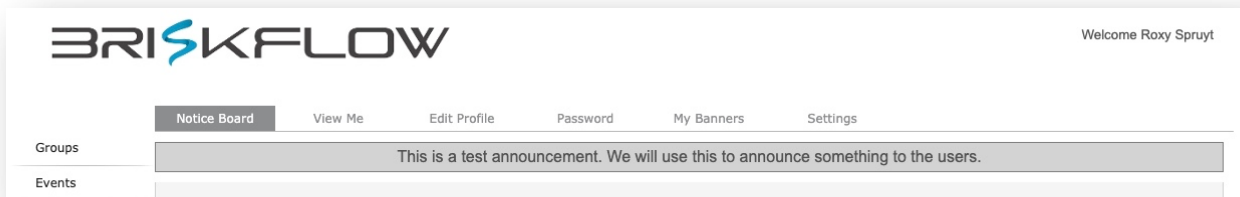
### **New Modules**

1) StockFlow – Multi-warehousing and Stock Management module....	P8
2) ManuFlow – Job Costing and Projects Management module.....	P8

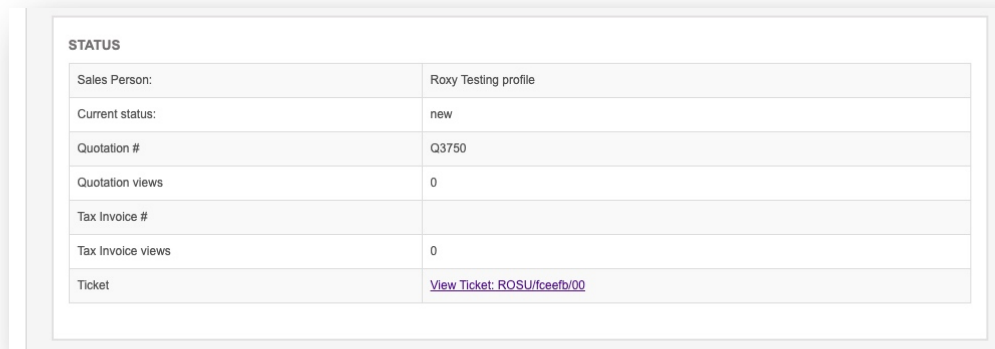
<b>Bug Fixes</b> .....	P9
------------------------	----

## New Features:

1. Announcement bar on login screen for all users to see updates done.



2. Lead details are now searchable in Audit File sites list area.
3. Linking a TicketFlow customer support ticket to a Quote and JC. Under the status area on the quote or job card you will now see a link that will take you to the ticket.



The screenshot shows a "STATUS" table with the following data:

STATUS	
Sales Person:	Roxy Testing profile
Current status:	new
Quotation #	Q3750
Quotation views	0
Tax Invoice #	
Tax Invoice views	0
Ticket	<a href="#">View Ticket: ROSU/fceefb/00</a>

4. Advanced Recurring Functionality
  - a. The system is now setup to ignore Weekend and will not schedule a recurring job on a weekend day, it will automatically schedule it for the next available Weekday. If you want the system to include weekend days, please click the "Include Weekends" tick box.

**REPEAT**

\* When must the job end?

Include Weekends

\* When do you want to schedule this?  
 Every  month/s on the  st/nd/rd/th.  
 Periodically every  days.  
 On the   of every month.  
 Select custom dates

b. We added 2 new recurring scheduling methods.

- i. 4 Weekly Cycle Scheduling. Selecting this option will enable you to setup a 4 weekly cycle for your job. You can select the 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup> or 4<sup>th</sup> week of a month the job should recur as well as which day of that week the job should recur.

**REPEAT**

\* When must the job end?

Include Weekends

\* When do you want to schedule this?  
 Every  month/s on the  st/nd/rd/th.  
 Periodically every  days.  
 On the   of every month.  
 Select custom dates

**REPEAT**

\* When must the job end?

Include Weekends

\* When do you want to schedule this?

Every  month/s on the  st/nd/rd/th.

Periodically every  days.

On the   of every month.

Select custom d

**FILES**

- ii. Select Custom Dates Scheduling. This option will enable you to view a calendar screen where you can click on the days to select when the jobs should automatically recur or be created. The calendar screen will be based on the length of the contract or the Recurring End date and you will be able to pre-select the days for the whole contract period in advance.

[WATCH VIDEO HERE](#)

- 5. Edit Line Item Description on Quote, Job Card or Invoice.  
 You can now edit a description of a Line Item on a Quote.  
 Select the Item from the list, Click on the Add Item button. Now click on the Edit button on that Line Item, change the Description and click Update.  
 This description will only be relevant for that particular Quotation and will not override the default item description.

**ORDER**

Currency :  Total Discount:  %

Pos.	QTY	Item	Unit	Disc %	Excl. Amount	VAT Amount	Incl. Amount	Discount	Amount
<input type="text" value="2"/>	<input type="text" value="Qty"/>	<input type="text" value="Search..."/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="1"/>	<input type="text" value="1.00"/>	<input type="text" value="Integrated Pest Management"/>	<input type="text" value="2376.187"/>	<input type="text" value="0.00"/>	<input type="text" value="2066.25"/>	<input type="text" value="309.9375"/>	<input type="text" value="2376.187"/>	<input type="text" value="0.00"/>	<input type="text" value="2,376.19"/>

ORDER

Currency : ZAR Total Discount: 0 %

Pos.	QTY	Item	Unit	Disc %	Excl. Amount	VAT Amount	Incl. Amount	Discount	Amount	
2	Qty	Search...								
1	1.00	IPM - New Site		2376.187	0.00	2066.25	309.9375	2376.187	0.00	2,376.19

Comments Update Remove

6. Edit date on Invoice

Once Invoiced, Click on the Preview Invoice Button. Next to the Print Button you will see a Change Invoice date Button.

Personal Message:


Additional Emails:

(You are able to add up to a maximum of 3 additional email addresses and split this up using ';' without any spaces)

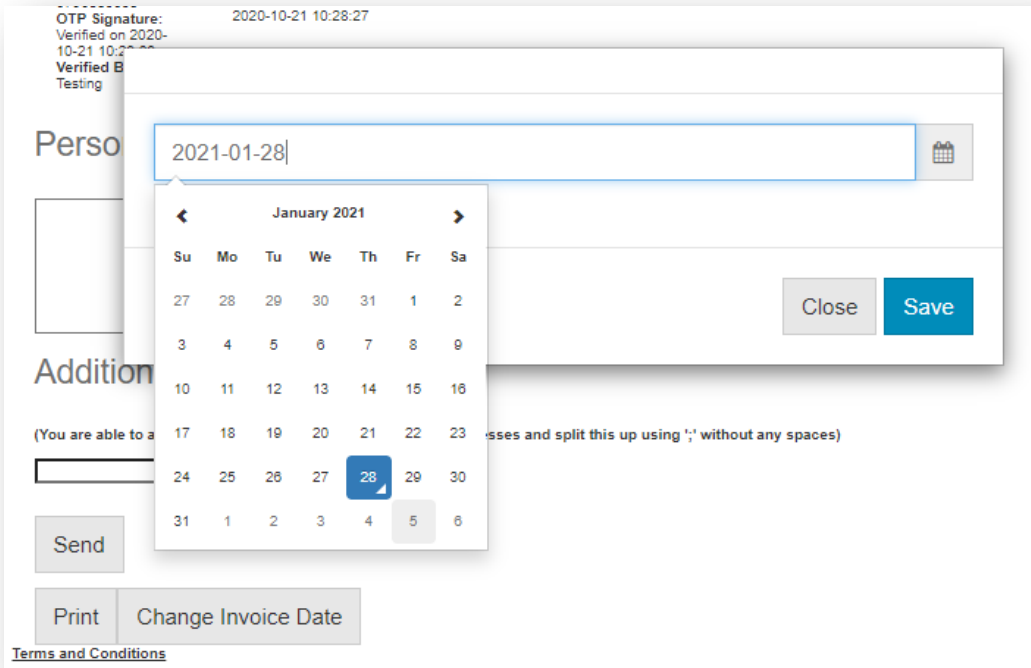
Send

Print Change Invoice Date

Terms and Conditions



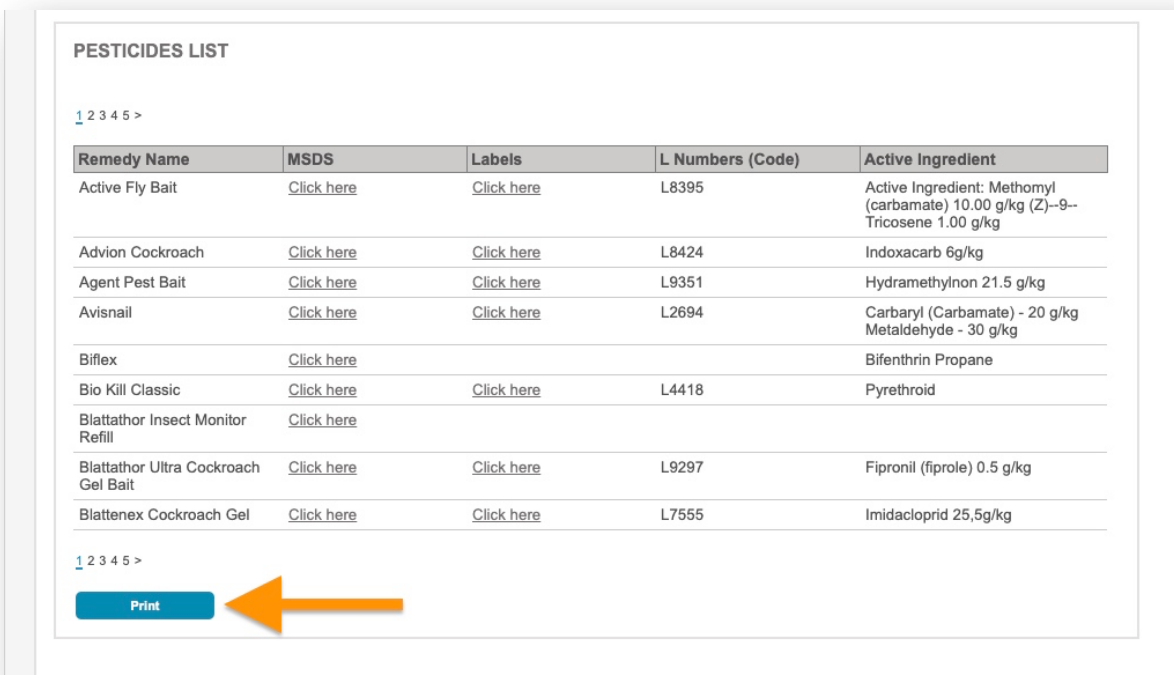
When you click it a Date picker will open up and you will be able to change the invoice date.



**Please note:**


- \*This functionality is role based. The business Owner must please send an email to [Support@briskflow.co.za](mailto:Support@briskflow.co.za) indicating who in the Company may get the role.
- \*Any dates changed on an Invoice is logged for Audit Trail purposes.

7. Pesticide usage list in the Audit File is now printable.



8. We have added an icon next to a Sub-Contact to assist in easy Identification.

\*Sub contacts can be created if you need to manage separate departments or divisions within a large organization. This will enable you to create Quotations and Job Cards for a particular business division but still Invoice the Main Company. Please send an email to [Support@briskflow.co.za](mailto:Support@briskflow.co.za) if you need additional info on how to use this functionality.

Company	Name	Email	Cell	Status	Organization
Briskflow Testing	Roxy Spruyt 	admin@briskflow.co.za	+27790830058	in progress	Pinion Paperless
Santa's Work Shop	Santa Clause	pinionpaperless2@gmail.com	0826463399	in progress	Pinion Paperless
Pest Control - KFC	Roxy Categories Testing	roxyjohr+spruyt@gmail.com	08799988877788	in progress	Pinion Paperless

9. Email integration for Customer Support Tickets

Making use of TicketFlow you can now link a customer support email address to your branch on the system which will auto create Customer Support Tickets.

We advise that you setup a dedicated email address, for example:

[customersupport@yourcompanyname.co.za](mailto:customersupport@yourcompanyname.co.za) which is shared with your client base for when they would like to log a support ticket.

Once the client sends an email to this dedicated email address, the system will automatically create a ticket on the system, which will be linked to the relevant client account.

For more information with regards the TicketFlow Module, please contact [support@briskflow.co.za](mailto:support@briskflow.co.za).

10. Send quotes to multiple email addresses.

The system now enables you to save and send multiple email addresses to whom a quotation should be sent. On the Lead Edit page there is a new email capture field. Add additional email addresses here and separate them with a “;” and no spaces.

Category: Retail

Accounting Email address (You are able to split this up using ';')  
Accounts@briskflow.co.za

Send Pdf  
 Yes  No

Funnel  
Deal Won

Lifetime Value  
R100,000.00

Payment Terms  
30 Days

Additional Email address (You are able to add up to a maximum of 3 additional email addresses and split this up using ';', without any spaces)  
sales@briskflow.co.za;admin@briskflow.co.za

Save

You can also add additional email addresses on the Quotation preview page before you send the Quotation.

## Personal Message:

## Additional Emails:

(You are able to add up to a maximum of 3 additional email addresses and split this up using ';' without any spaces)

Sales@briskflow.co.za;admin@briskf

Send

Print

Print without pricing

[Terms and Conditions](#)

## New Add on Modules:

### 1) StockFlow – Multi-warehousing and Stock Management module

StockFlow is a full system integrated multi-warehousing and stock management tool.

#### Features:

- Create a Main (Default) warehouse where all supplier invoices and stock quantities will automatically sync from Sage Business Cloud Accounting on creation of a Supplier Invoices.
- Manage your stock down to the smallest quantity with the built in quantity conversion function.
- Link a stock item to a Remedy or Consumable. This will then automatically build up the Remedies used on a Job card with the MSDS information on it and vice versa. If the Remedy is selected by the technician on techie view, the system will automaticity add the Stock item and quantity to the job card for stock management purposes.
- Create Unlimited amount for warehouses.
- Create your Technicians / Delivery drivers as warehouses (Bakkie Stock) and manage all stock allocated to staff or contractors.
- View all stock requirements for all accepted quotes and scheduled jobs in the Requisitions area.
- Once stock is received the system will auto allocate stock to open Projects.
- View stock requirements for each Technician / Delivery Driver based on allocated Jobs and Deliveries and move the stock to the Technician with a click of a button.
- All jobs or deliveries done by a technician or driver will decrease the stock from his warehouse “Bakkie stock”.
- Have full transparency over your stock usage and movement.
- Enable your Sales Reps to view available stock quantities on hand while in the field.

StockFlow is billed at R450.00 Excl. VAT per Company per month.

### 2) ManuFlow – Job Costing and Projects Management Module

ManuFlow is a fully System Integrated Job Costing and Projects Management Module.

Features:

- Create Job Costings for service Items
- Add cost elements, stock items, labour and resources to your Service which does not display on your client's documents
- View Profit / Loss per Job
- Create Department and link users
- Create Main and Sub Task with Automated notification to Sub Task Owner once Main Task is completed
- Time Tracking per Task with Start / Pause / Stop on each Task

ManuFlow is billed at R450.00 Excl. VAT per Branch per month.

**Bugs that has been fixed:**

1. Renaming service area units stays on the page you are working one. It does no longer jump back to page one
2. Status Count on Map View will show you all jobs that do not have accurate addresses
3. JC number not displaying when printing to PDF
4. Opening site plan in the audit file opens up in a window that is too large
5. Creating a related job on credit note changed the amount on the new job
6. Client signature does not display on Preview Documents
7. Pesticide amounts on techie view not pulling through to admin view