

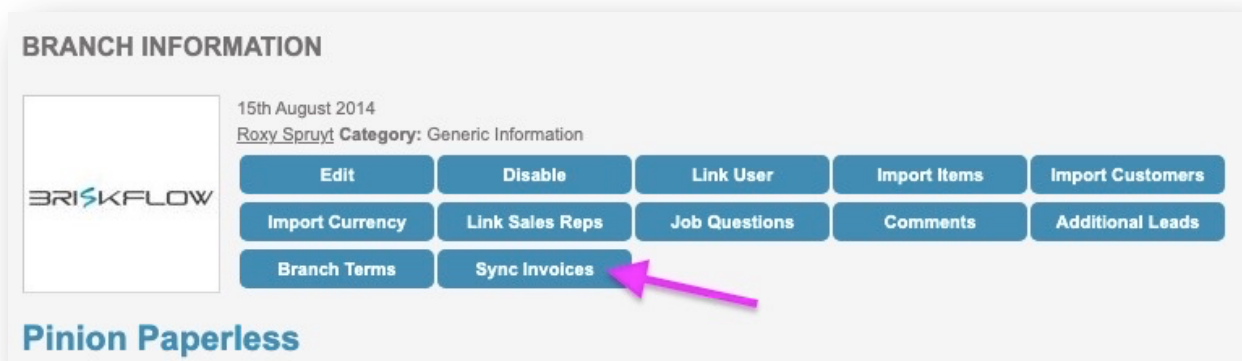
BRISKFLOW

Platform Update – June 2021

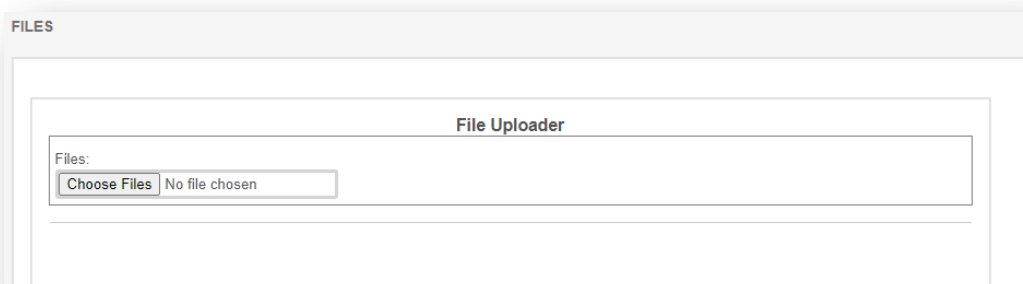
New Features and System Changes

Scheduler:

- 1) Create Quote, Create Job Card and Create Invoice button will be disabled once clicked so that duplicate documents cannot be created.
- 2) List displaying all invoices pushed to Sage that we did not get delivery confirmation from Sage.
Click on Branches and then on Sync Invoices. This will display a list of all Invoices that needs to be processed to enable a full sync between Sage and the Platform.
Click on Process on the relevant Job Card and Click on the Invoice – Sage button again.
This will sync the Invoice and “Fetch” the Invoice number from Sage.



- 3) Multiple file selection and upload
The system now has the ability to upload Multiple Documents at the same time. This will be available on all the points where documents can be uploaded.
Click on Upload Documents



Select all the files that you need to Upload, Select the File Type where the Documents need to be Uploaded and Add a Document name. Now click on Upload all.

File Uploader

Files:
 2 files

1. kohinor350sc_tcm54-23635.pdf

Select File Type:

File Name

2. kohinor350sc_tcm54-23716.pdf

Select File Type:

File Name

The System will confirm that the document was successfully uploaded and display the uploaded file on the documents area.

File Uploader

Files:
 2 files

1. kohinor350sc_tcm54-23635.pdf Upload Completed

2. kohinor350sc_tcm54-23716.pdf Upload Completed

OR

* Please note that your client might not receive your email and the attachments if your files exceed 8mb.

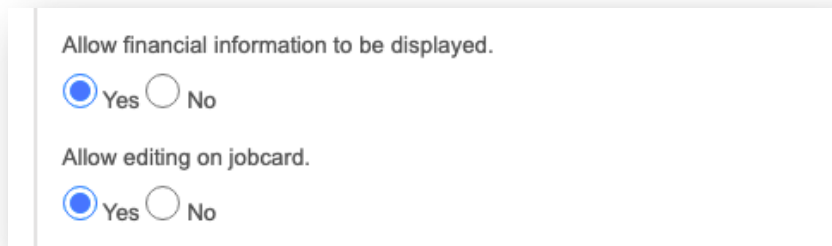
Order By

Delete	File Name	File Type	Upload Date	File Size	Link
<input type="checkbox"/>	Kohinor 350 MSDS.pdf	Documents	2021-08-14	0.08 mb	View
<input type="checkbox"/>	Kohinor 350 Label.pdf	Documents	2021-08-14	0.26 mb	View

4) Disable editing and pricing info

We introduced 2 additional permission roles.

- a. Allow editing on job card (y/n) - default yes - org setting
- b. Allow financial information to be displayed (y/n) - default yes - org setting

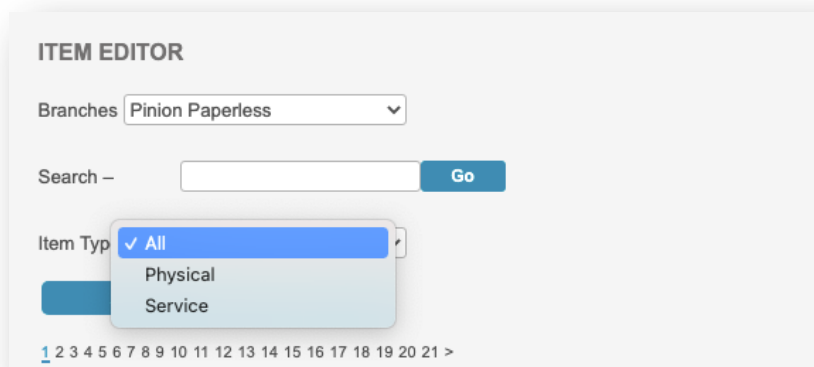


Allow financial information to be displayed.
 Yes No

Allow editing on jobcard.
 Yes No

5) Filter for services and physical items on Item view page added.

Inactive Items will also move to the back of the Items list once disabled.



ITEM EDITOR

Branches Pinion Paperless

Search - Go

Item Type All
 Physical
 Service

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 >

6) Seeing Customer Sage Balance Info is now Role based.

Please inform the BriskFlow support team, which of your staff members should not see this information and we will disable this permission.

7) Notification on DocFlow

Notification will be sent to POC when a DocFlow document has been completed and signed by your client.

8) Add allotted Time to Job Card with countdown of Job Time.

The technician will now be able to see a countdown timer on Techie View that will display how much scheduled time he has left on that Job.

9) Day view to start at 2am and not midnight:

TIMETABLE FOR PINION PAPERLESS - 14TH JUNE 2021

Work Time First Job Last Job Current Time < Week view >

Technician	2am	2:15am	2:30am	2:45am	3am	3:15am	3:30am	3:45am
Pending								
Brent Coetzee								
techie test P1234								
Bjorn Potgieter								
Roxanne Spruyt								
Victor Ticket Test User								
Etienne Snyman								
Marina Beukes								

10) Time window on confirm booking

On the Confirm Booking notification that gets sent to a client we display the exact scheduled Time of the job. Some clients have requested us to only display the Date but not the time as this might vary based on circumstances.

You now have the ability to switch this on or off on your Branch Settings.

Hide Timing Window on Confirm Booking Email and Jobcards/Quotes.

Yes No

Save

HACCP:

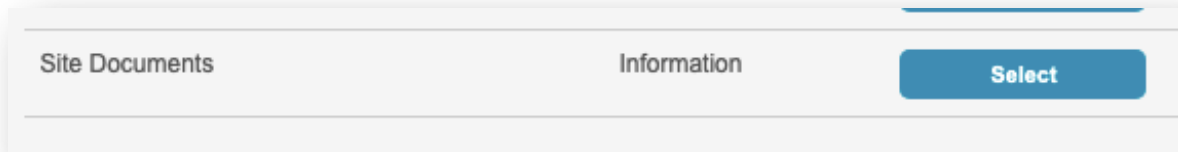
1) On a Unit Scan the "Action required by" option will display on the Monitoring Logs based on the option selected.

2) Once a site is disabled it will be moved to the "Disabled Sites" Tab. Only the active Sites will display on the "My Sites" Tab.

Lead	Sites Name	Info	Health Score	Status
Larrem Pty Ltd	Larrem	Branches: Pest Control Specialists - Centurion No. Service Area: None No. Users: 5 No. Units: None Sites Type: PRP	PRP: 100%	Enable
Jaundre Kruger	Madibi	Branches: Pest Control	PRP: 0%	Enable

3) Monthly report on all generated documents on HACCP sites

This is an additional Report that can be found on Branch Report.



Manufacturing, Projects, and Stock:

1) User will not be able to complete a Job if there is stock required and outstanding on that job.

2) Project inspections tool built

This enables a Technician to do an Inspection and build up what services need to be applied to the site.

The selection will automatically build up Manufacturing, Maintenance or Service Recipes that need to be done.

3) Approvals - multiple layers

We expanded the Approvals Module into Multiple Layers. You now have the ability to add multiple Workflows and approval processes on one Job.

4) We implemented additional functionality to ensure that factory tasks are following FIFO and Red protocols.

5) We added an option in the Branch Settings where you can enter in the total Work Hours in a day for Factory workers. This setting will determine be used when work gets scheduled in a Multi-Shift factory environment.

- a. To set this up, Go to your branch settings, scroll down to the setting “ManuFlow number of work hours in a day” and set the number of hours your factory will be operating.

6) Trigger to start a Work Order for production.

We added an additional role which will enable a Manager to initiate a Work Order and manufacturing process.

7) Additional information that displays on an Approval Notification.

- a. JC Number,
- b. Client Details and
- c. Project Manager details

- 8) Heading name Change:
- a. 'Name' on task list must change to 'Task Name'

Assets:

- 1) Fields added to Assets
- a. Purchase date (date picker)
 - b. Purchase value (text field)
 - c. Depreciation type (dropdown with the following options:
 - i. Straight-Line Depreciation.
 - ii. Declining Balance Depreciation.
 - iii. Sum-of-the-Years' Digits Depreciation.
 - iv. Units of Production Depreciation
 - d. Effective lifetime (date picker)
 - e. Cost to replace (text field)
 - f. Warranty Expiry Date (date picker)
 - g. Additional Information (Text Box)

The screenshot shows a form titled "Tracking Device" with the following fields and controls:

- Tracking Device:** A dropdown menu currently showing "None".
- Maintenance Date:** A date picker button labeled "Click the butt" with a blue button containing "...".
- Maintenance Notes/Reason:** A large text area for notes.
- Purchase Date:** A date picker button labeled "Click the butt" with a blue button containing "...".
- Effective Lifetime:** A date picker button labeled "Click the butt" with a blue button containing "...".
- Warranty Expiry Date:** A date picker button labeled "Click the butt" with a blue button containing "...".
- Purchase Value:** A text input field.
- Depreciation Type:** Radio buttons for "Straight-line", "Declining balance", "Sum-of-the-years digits", and "Units of production".
- Replacement Cost:** A text input field.
- Additional Info:** A large text area for additional information.
- Save:** A blue button at the bottom of the form.

Bug Fixes:

- 1) Item with Recipe does not update price and cost on Sage
- 2) Service Item changes to physical item once added to a Recipe
- 3) Person creating the corrective action needs to receive all notifications
- 4) Large Audit File site was slow. Speed improvements on Reports.
- 5) Cannot edit the expiry date on documents generated on audit files on the PRP Index – DocFlow.
- 6) On Sales Activity view page, the file uploader is not uploading the attachments.