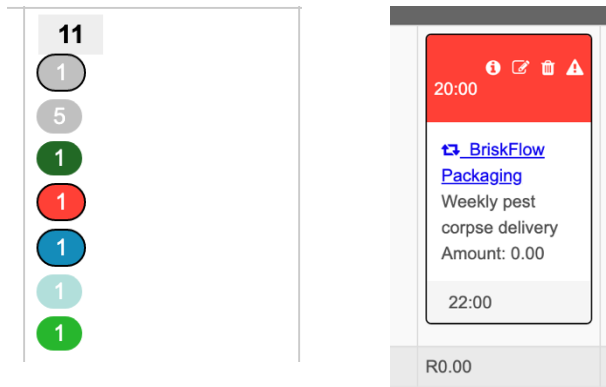


Scheduler

1. New System Features

a. Prebuild Future Jobs in a Recurring schedule

- Previously recurring jobs were only built into the scheduler once the current job was completed, not giving you little visibility of work that will be due in future months.
- Now, the system will build placeholders for all the future jobs in the scheduler which will assist in better planning for your field teams. These future jobs will not have any Quotation or Job Card numbers and will not become active until the current job is completed. You can change the future job's date, assigned technician and items. This will only affect the future job you are working on. These future jobs can be identified with a black border around the job on the month and week view.



- Please note: Once you have built up your recurring schedule, added your items and click on save there will be a popup screen where it will process this request. Because there are many processes that happen while building the future jobs into the scheduler, it may take a few minutes to process. Please do not close this popup screen until it informs you that the processing was completed. You however will be able to continue working on the system during this process.
- During this update we will build up all your future jobs. If any of your recurring jobs are built up but is part of a non-active job sequence, you can manage it from the Schedule Repeat Management area. In this area you can view all your recurring schedules, delete future jobs and deactivate non active jobs schedules. This is role based.

SCHEDULE REPEAT MANAGER				
Branches				
Pinion Paperless t/a Briskflow				
1 2 3 4 5 6 7 >				
Repeat ID	Lead Name	Last Job Date		
19239787	Testing Lead Delete	2019-01-10	View Last Job	Delete Schedule Repeat
19254406	Victor Spruyt	2018-11-26	View Last Job	Delete Schedule Repeat
19297350	Victor Spruyt	2018-10-01	View Last Job	Delete Schedule Repeat
19327842	Testing PDF - YES	2018-12-05	View Last Job	Delete Schedule Repeat
19366015	Victor Training	2018-11-02	View Last Job	Delete Schedule Repeat
19366278	Victor Training	2018-10-08	View Last Job	Delete Schedule Repeat
19457019	HENRIETTE HEYSTEK	2018-10-12	View Last Job	Delete Schedule Repeat
19471515	Taylor Smith	2019-01-19	View Last Job	Delete Schedule Repeat
19471699	Taylor Smith	2019-04-07	View Last Job	Delete Schedule Repeat
19471933	Taylor Smith	2019-06-23	View Last Job	Delete Schedule Repeat
19520258	Sandra Adams 2	2018-10-16	View Last Job	Delete Schedule Repeat
19722575	Sandra Adams 2	2018-10-31	View Last Job	Delete Schedule Repeat

b. Branch and Sales Rep Sales Targeting and Tracking

- Branch Sales Targets and Tracking

You now have the ability to add Sales Targets for your branch for current and future months. The system has a new Sales Targets tab which you will find on the SaleFlow Module where you can build up your branch sales targets. We have added an always on-screen display which shows the current sales to target on the top right hand side of all screens on the platform.

Please see images below.

Please note that we have added two new roles;

- sales_branch_manager – You need this role to build up the sales targets.
- sales_branch_targets – Your staff needs this role to see the on-screen target display.

Welcome Victor Spruyt

Branch Target for BriskFlow Demo Branch for October

R104285.9129 / R650000 with 18 days to go

R30317 per day to achieve target

View Reports View Targets Change Branch

Sales Targets Sales Performance

For all support queries click [here](#) to load a ticket.

SALES TARGETS FOR BRISKFLOW DEMO BRANCH

Year: 2022

	January	February	March	April	May	June	July	August	September	October	November	December
Branch:	500000	550000	550000	550000	550000	600000	600000	600000	600000	650000	650000	700000

Welcome Victor Spruyt

Branch Target for BriskFlow Demo Branch for October

R219285.9129 / R650000 with 18 days to go

R23929 per day to achieve target

View Reports View Targets Change Branch

Create My Sales Day Sheet Sales Day Monitor Sales Monitor Pipeline Report Full Sales Report Sales Targets

Sales Performance

For all support queries click [here](#) to load a ticket.

SALES PERFORMANCE FOR BRISKFLOW DEMO BRANCH

Change Branch

Month: October

Year: 2022

Sales Person	Amount	Target
Branch:	219,285.91	650000

- Sales Reps Sales Targeting and Tracking – Linked to the SaleFlow Add on Module

You now have the ability to add Sales Targets for your sales reps for current and future months. The system has a new Sales Targets tab which you will find on the SaleFlow Module where you can build up your sales reps sales targets. The sales rep will be able to view their current sales made and outstanding amount to target on the new always on-screen display on the top righthand side of all screens. Please note that we have added two new roles;

- sales_branch_manager – You need this role to build up the sales targets.
- sales_branch_targets – Your sales rep needs this role to see the on-screen target display.

Welcome Victor Spruyt

BRISKFLOW

Your Target for October
R115000 / R150000
 with 18 days to go

R1944 per day to achieve target

[View Reports](#)
[View Targets](#)
[Change Branch](#)

Create My Sales Day Sheet Sales Day Monitor Sales Monitor Pipeline Report Full Sales Report **Sales Targets**

Groups Sales Performance

Articles For all support queries click [here](#) to load a ticket.

Branches

Schedule

Tracking

Audit File

Actions

Assets

Files

Item Categories

Items

Leads

Ticket

Document

Sales

SALES TARGETS FOR BRISKFLOW DEMO BRANCH

Year: 2022

	January	February	March	April	May	June	July	August	September	October	November	December
Branch:	500000	550000	550000	550000	550000	600000	600000	600000	600000	650000	650000	700000
Frieda Neethling	30000	30000	30000	30000	35000	35000	35000	35000	40000	40000	40000	40000
Jaco du Plooy	50000	50000	50000	50000	50000	55000	55000	55000	55000	55000	60000	60000
Pinion Testing	100000	100000	100000	100000	100000	125000	125000	125000	125000	125000	150000	150000
Sean Mutemeri	50000	50000	50000	50000	50000	55000	55000	55000	55000	60000	60000	60000
Soleil Wyeth	50000	50000	50000	50000	50000	55000	55000	55000	55000	60000	60000	60000
Trudie Engelbrecht	45000	45000	45000	45000	50000	50000	50000	50000	50000	50000	55000	55000
Victor Spruyt	100000	100000	100000	100000	125000	125000	125000	150000	150000	150000	155000	155000

Welcome Victor Spruyt

BRISKFLOW

Branch Target for BriskFlow Demo Branch for October

R219285.9129 / R650000
 with 18 days to go

R23929 per day to achieve target

[View Reports](#)
[View Targets](#)
[Change Branch](#)

Create **Sales Performance** My Sales Day Sheet Sales Day Monitor Sales Monitor Pipeline Report Full Sales Report Sales Targets

Groups Sales Performance

Articles For all support queries click [here](#) to load a ticket.

Branches

Schedule

Tracking

Audit File

Actions

Assets

Files

Item Categories

Items

Leads

Ticket

Document

Sales

Manufacturing

SALES PERFORMANCE FOR BRISKFLOW DEMO BRANCH

[Change Branch](#)

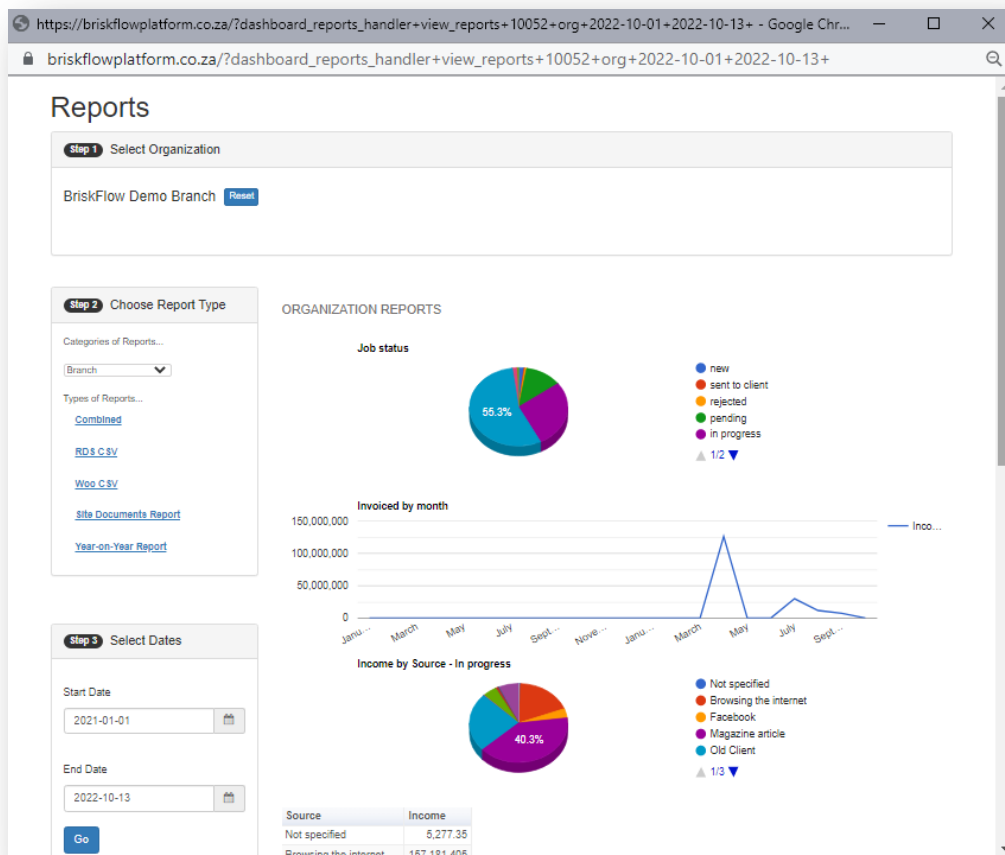
Month: October

Year: 2022

Sales Person	Amount	Target
Branch:	219,285.91	650000
Frieda Neethling	95,677.11	40000
Jaco du Plooy	8,096.00	55000
Pinion Testing	0.00	125000
Sean Mutemeri	0.00	80000
Soleil Wyeth	0.00	80000
Trudie Engelbrecht	0.00	50000
Victor Spruyt	115,000.00	150000

c. New Reporting Dashboard

In the always on-screen display we added a View Reports button. Clicking on this will open a popup screen where you can access all reports currently available on the platform. This will become the business intelligence dashboard and all new reports will be built and display in this area. Please note, Reports are role based.



d. Year on Year Report

This report will give you a month on month and year on year comparison of your branches total sales indicating increase with a green text and decrease in red text.

You can access this report in two areas.

- Branch Reports
Click on Branch's, Reports and scroll down to Year-on-Year Report. Select the year from when you want the report to run.
- Reporting dashboard
Click on the View report button, open the popup screen, select your branch, click on Categories. Select Branch Reports and the Year-on-Year report.

e. System notification subject line

The quote, job card or invoice number will be used in the email notification subject line. This will help when a client replies to the email, you will be able to see which document the client is referring to.

f. SMS notification to Techie

You can now select in the Branch settings if you want to send SMSs to your Technicians when a Job is assigned to them. Please note that you need active SMS credits. If you would like to activate this feature, please contact admin@briskflow.co.za.

g. Lead Source History Reporting

We have added the functionality for you to edit the Lead Source as and when it might change. The original Source could have been from a Facebook add. In 6 months, the client sees a Google Ad and a sale is generated, the Source needs to change to Google AdWords.

The system now will store all this information and reporting will make use of the source based on date selected in the query.

h. Percentage Activity level per species

We added the ability to see the % activity per species based on activity logged on a particular monitoring unit. If you log a finding of 25 House Flies, 25 Stable Flies and 50 Midges on one Insect Light trap, the monitoring log will indicate the activity as, 25% House Flies, 25% Stable Flies and 50% Midges.

Please see Image below.

Log Variables and Species							
Date	Time	Service Area	Unit Type	Unit Description	Activity	Action	Technician
2022-10-13	13:05:35	Service Area 2	Insect Light Trap	ILT - 1	Medium (50%)	None	techie test P1234
House Flies: 25.00 (25.0%) ; Stable Flies: 25.00 (25.0%) ; Midges: 50.00 (50.0%) ;							
Name: Glueboard Amount: 1.00 Units (U)							

2. System Changes

- a. When a quote was created in the sales activity, and then gets invoiced, that sales activity must automatically be marked as completed
- b. Client name used to auto fill on client signature on the job cards on Techie View. This has been removed. The technician needs to manually enter in the person who is signing the job card.
- c. We are now catering for credit notes on all affected platform reporting.
- d. Technicians display alphabetical now on week and day view.
- e. Monitoring units in Audit Files that has activity can not be deleted, only disabled.

3. The following Bug Fixes was done.

- a. System remembers quote expiry date the user entered on a previous quote.
- b. Audit file showing 110%
- c. Alignment of the day view
- d. Invoice number on Job and on Info box in week view differs
- e. In ComplianceFlow Techie view - Treatment Reports alignment of the buttons was not correct
- f. Ticket allocation was linking to wrong user

Callouts

4. New Features

- a. Linking Multiple assets to one callout is now available.
- b. Approval flow on Callouts based on Available Budget is now available. Will only be available once setup is done on live platform.
- c. Callout cancellations is now available. An active callout can be cancelled after it's been accepted by the vendor. A notification will be sent to the Vendor POC and Technician (if scheduled).
- d. A callout can be edited after it's been created. Click on the edit button and make the changes as needed. This feature is linked to the callout approval role.
- e. A closed Callout can now be reopened. Click on the Reopen button on a completed callout and the callout and linked Vendor Job card will be opened and change to an In-Progress status.

5. **Changes and Bug fixes**

- a. Asset Manager management section showed twice on the lead view page.
- b. Callout description pop-ups on callouts did not work with Apple devices.
- c. Linking vendor list on lead was not alphabetical.
- d. Call Out linked to one vendor, and Job linked to a different vendor bug was fixed.
- e. Callout creation notification to Maintenance Manager was fixed.

Assets

1. New Features

- a. Adding notes to Assets is now available.
- b. Adding Images and Comments on Disposal Requests is now available.

2. Changes and Bug fixes

- a. Change to the Movement and Disposal request dashboard was made to display the latest request on top.