

ServiceChannel R3 2021 Webinar Highlights

Release Date: July 20 - 22, 2021





Today's Hosts

Speakers

Panelist



Ling Tan

Customer Success Manager
San Francisco, CA



Angie O'Brien

Customer Success Manager
San Diego, CA



Chuck Carroll

Customer Success Manager
Columbus, OH

Agenda

- Intro
- Proposal Enhancements
 - New UI and Dashboard View
- Invoice Enhancements
 - New UI and Itemized GL Codes
- Dashboard Enhancements
- WO Enhancements
 - Dynamic WO Notes recipient selection, Original NTE Note, and fewer Emails!
- Analytics Enhancements
- SCU Enhancements
 - Globalized documentation for Locations and Providers, New Data Dictionary
- Mobile App Global/Europe instance
- MS IE 11 Goodbye
- Q&A



The Proposals List is Redesigned!

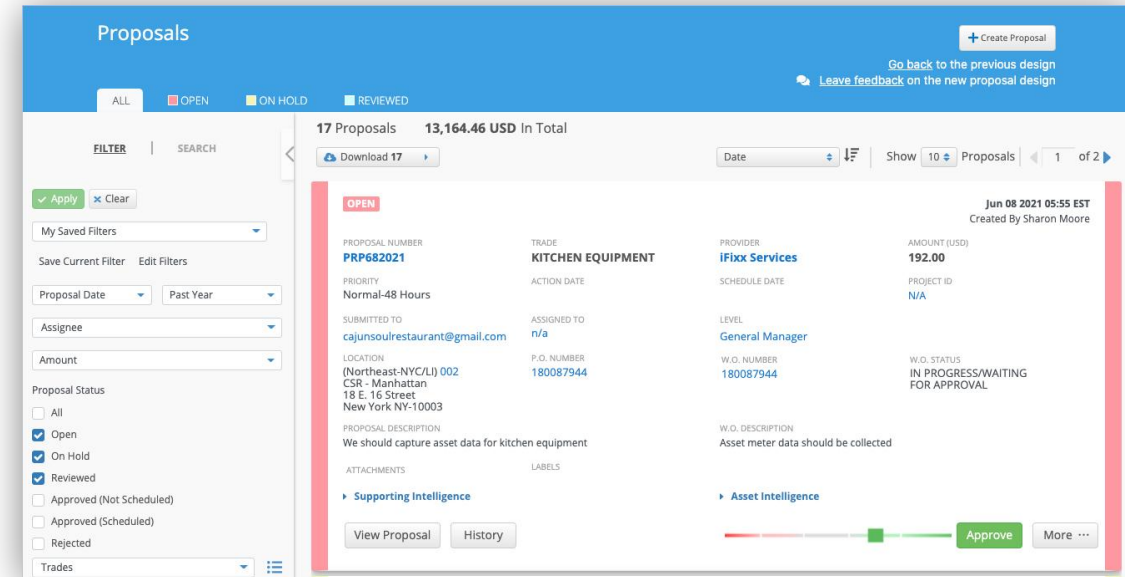
Fewer clicks, more visible data, real-time filtering

The **redesigned Proposals List** Proposals List comes with a cleaner user interface that provides you with better visibility into proposal data. Clicking the Proposals menu now leads straight to the redesigned list — 2 clicks less than before. From here, you will see the most important information placed first and visually highlighted for each proposal.

The **Approve** action is now a separate button that's right on the Proposal List, making it faster for you to approve proposals without entering more menus. When **Proposal Recommendation** is enabled, you'll see either the Approve or Reject button based on the recommendation given. To take a different action, just click "More..."

RFPs are now its own separate module, for easier navigation.

Give the new Proposal List a try! Toggle your view from the View/Process Proposals page to see the new view.



- ✓ More Intuitive Design
- ✓ Filter & Results in the same view
- ✓ Save Filter Views
- ✓ Mark a Saved Filter Default
- ✓ Filter by Amount



Updated Invoice Line Items Layout + Itemized GLs

With this release, you'll see a new, more streamlined view of all invoice charges in a vertical layout!

Labor	Approval Code
Technician	1234
Helper	1503
Labor Total	
Travel	Approval Code
Travel	8895
Material	Approval Code
Pole connector	1234
Pole rope	1234
Pole base nuts	1212

Now with **Line Item GL Codes**, you can specify different GL codes alongside a general invoice GL code, available for the trades and categories specified in Invoices Admin.

The Invoice Approval Code will still default based on your rules, but users may select each code to make edits.

Freight charges will be allocated across the various GL codes chosen.

On the Invoice List, you can search for invoices using these individual GL codes. You will also see Line Item GL codes in reports.

Speak with your CSM to enable the use of Line Item GL Codes. In some cases, it may require a change to eInvoice formats.

- ✓ Differentiate Labor vs Materials GL
- ✓ Different GL for different Supply Manager Items
- ✓ CapEx vs OpEx

#ICYMI: Proposals & Invoices are available on the Dashboard and as a Default Tab option

In case you missed it (#ICYMI), for Dashboard users, you can now configure the default tab to open to two new options: Approve Invoices and Approve Proposals. Under the General tab in Dashboard Admin, choose one of these tabs for users to land on when they log in so they can approve proposals and invoices faster.

No need to wait for the release — this feature is available **today!**

- ✓ For Location Users
- ✓ For Expert Dashboard Users

Invoice#	Invoice Date	Inv.Amount	Tracking#	Proposal#	Provider Name
INV179169132	7/1/2021	250.00	179169132		Internal FM
INV17287250	5/31/2021	250.00	17287250		Internal FM
INV175534418	5/1/2021	250.00	175534418		Internal FM

Enhancements to WO Features



The Original NTE is now included in the 1st WO Note. This will help you track back the history of NTE changes.



Dynamic Search

Work faster when selecting WO Note Recipients. Now you can “Select All”, “Click to Select”, or “Type to Search” within the Note Recipient List.

The screenshot shows the top navigation bar with tabs: CHECK IN / OUT, CHECKLIST, ASSET HISTORY, PROPOSALS, ASSET DETAILS, INVOICE & MATERIALS / PARTS, and LINKED WORK ORDERS. Below the navigation is a green button labeled '+ Add Note / Update Schedule Date'. A list of notes is displayed, with the first note highlighted. The note details are: 1, Jun 09 2021 16:32 EST, Created By Sharon Moore, Cajun Soul Restaurant. The note text is 'Service Request has been dispatched to The Family Business via thefamilybusiness30@gmail.com with 500.00 NTE.' The '500.00 NTE' is highlighted with a pink box. The note is scheduled for Jun 16 2021 16:31 EST.

The screenshot shows the 'Add Note / Update Schedule Date' form. It includes a checkbox for 'Action Required', a 'Schedule Date' field set to 'Jun 16, 2021' at '18:00 EST', and a 'Reschedule Reason' dropdown set to '[NONE]'. The 'Add addressee(s)' field contains 'Bill Davidson', 'Dina Dielberg', and 'Lina Hopkins'. Below this is a list of recipients with checkboxes: 'Select all', 'Bill Davidson bdcajansoulrestaurant@gmail.com', 'Dina Dielberg dina.dielberg1996@gmail.com', 'Koben Havn v.fjordjenta@gmail.com', 'Lina Hopkins sc.linahopkins@gmail.com', and 'TBC051 cajansoulrestaurant@gmail.com'. The 'Total addresses: 6' is shown. At the bottom are 'Close' and 'Save and Send Note' buttons.



Fewer WO Emails

Provider MacBernie Contractor Services	Customer TOI Playground Pleasanton CA 022
Phone <u>212-555-1212</u>	
Trade DOORS	Scheduled July 13, 2021 01:52 PM

Most Recent Edits
"Schedule Date changed from Jul 08, 2021 13:52 PST to Jul 13, 2021 13:52 PST. Reschedule Reason: MANAGER REQUESTED. "

New Note
"Adding the 1st note." - TOI Playground User

Previous Note
"Service Request has been dispatched to MacBernie Contractor Services via macbernieservices@gmail.com with 0.00 NTE."- TOI Playground User

Create New Note
click button or reply to this e-mail

Work Order Note Followers
Mac Bernie



One email now contains all edits and new notes - meaning less clutter in your inbox!

- ✓ Save time reading emails
- ✓ Quickly and easily work through maintenance requests
- ✓ Focus on what's important



New in Analytics! ▶ Pilot Dashboards

AVAILABLE NOW

User Activity Report

Weeks ending (Fridays) in the Date Range: Last 30 Days

User Name: demo-alex | User is SC Employee (Yes / No): Yes No | User Type: Corporate Dashboard

User Activity

The User Activity Report summarizes the total actions taken by system users in the weeks selected. This data is saved by the week (Saturday-Fridays) and available in high level summary totals only.

User Activity by Week

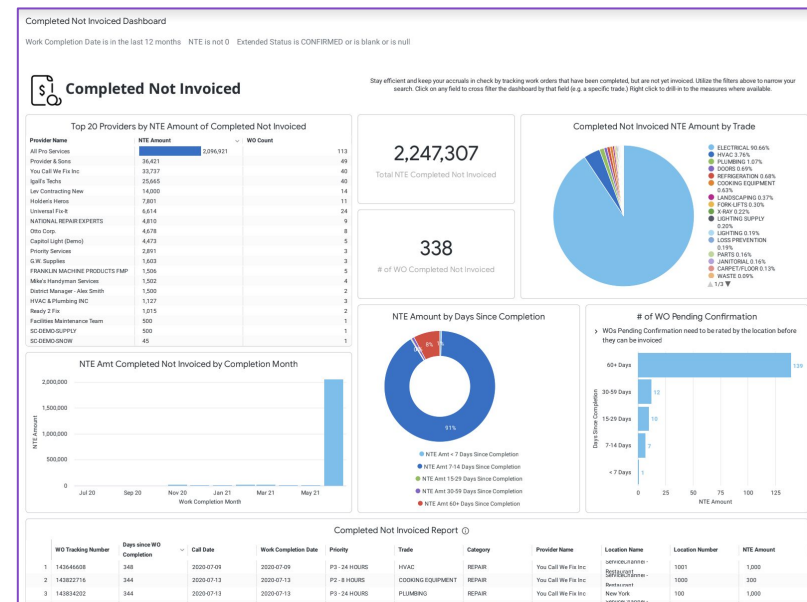
User Name	User ID	Week ending (Fridays) Date	User Type	Workorders Created Count	Workorders Completed Count	Workorders Reassigned Count	Workorders Status Change Count	Notes Entered Count	Invoices Approved Count	Invoices Rejected Count	Invoices Reviewed Count	Proposals Approved Count	Proposals Rejected Count
Alex Vienna - FM	demo-alex	2021-06-04	Corporate	2	1	0	3	6	0	0	0	0	0
		2021-06-11	Corporate	2	0	0	1	3	0	0	0	0	0
		2021-06-18	Corporate	9	0	0	5	16	0	0	0	0	0
		2021-06-25	Corporate	3	1	0	12	15	0	0	0	0	0
Alex Vienna - FM				16	2		21	40					
Anthony Bland	anthony-admin	2021-06-25	Corporate	0	0	0	1	0	0	0	0	0	
	demo-anthonyb	2021-06-25	Corporate	2	0	0	0	4	0	0	0	0	
Anthony Bland				2			1	4					

User Activity Report

The User Activity Report provides insight into the work done by your Facilities team. Look by user to see weekly metrics displaying the work that user has done in ServiceChannel - e.g. # of WO Created, # of WO Completed, # of Invoices Approved, etc.

Completed Not Invoiced Dashboard

This Dashboard will help you keep tabs on those accruals by tracking work orders that are completed but not yet invoiced.



Find all of these new Dashboards in Analytics ▶ Additional Folders ▶ Pilots Dashboards





New Data Dictionary is live for Data Direct customers!

Data Direct customers can now look up Data Dictionary terms in an extension of our ServiceChannel University space. Please visit the new Data Direct homepage and look up your favorite data terms:

<https://servicechannel.atlassian.net/wiki/spaces/DD/overview#!spacehome>

SPACE SHORTCUTS

- SCU Release Notes
- SCUniversity | Providers
- SC | Data Direct**
- SCU | Global

Pages

- Data Direct: Data Dictionary
- Data Direct: Table Definitions
- Data Direct Release Newsletters
- Entity Relationship Diagram

Data Direct

ServiceChannel

ERD IN LUCID
Review the Entity Relationship Diagram and how data tables connect
View the ERD

DATA DICTIONARY
Search our data dictionary for data columns and types
Search the Data

RELEASE NEWSLETTERS
Check out newsletters of our releases
See the Updates

✓ Search by any data table name or data column name, or by any field, constraint, or text.

DD Table Name = Data Type =

Filter whole table =

	DD TABLE NAME	DD COLUMN NAME	DATA TYPE	CONSTRAINT	DEFINITION
1	workorder_notes	CreatedBySource	nvarchar(100)	null	
2	workorder_notes	CreatedDate	datetime	null	
3	workorder_notes	Date_Created_dto	datetimeoffset(7)	null	
4	workorder_notes	id	int	not null	
5	workorder_notes	Note	nvarchar(4000)	null	
6	workorder_notes	NoteNum	int	not null	
7	workorder_notes	ProviderID	int	null	
8	workorder_notes	TrackingNumber	int	not null	



ServiceChannel University - Multilingual Content

Chinese • Dutch • French • German • Greek • Hungarian • Romanian • Russian
Spanish*

SPACE SHORTCUTS

- SCU Release Notes
- SCUniversity | Providers
- SC | Data Direct
- SCU | Global**

The screenshot shows a dashboard with a word cloud of greetings in various languages (e.g., Bonjour, Guten Tag, Hello, Salam, Ciao, etc.) and a grid of language selection buttons. The buttons are arranged in two rows:

中文 按一下此處	NEDERLANDS KLIK HIER	FRANÇAIS CLIQUEZ ICI	DEUTSCH HIER KLICKEN
Ελληνικά Κάντε κλικ εδώ	MAGYAR KATTINTSON IDE	ROMÂNĂ FACETI CLIC AICI	РУССКИЙ НАЖМИТЕ СЮДА

For Locations

ÉQUIPES DES ÉTABLISSEMENTS

Apprendre les bases du tableau de bord et de l'automatisation des services

[En savoir plus](#)

For Providers

FOURNISSEURS

Faites vos premiers pas dans l'automatisation des fournisseurs

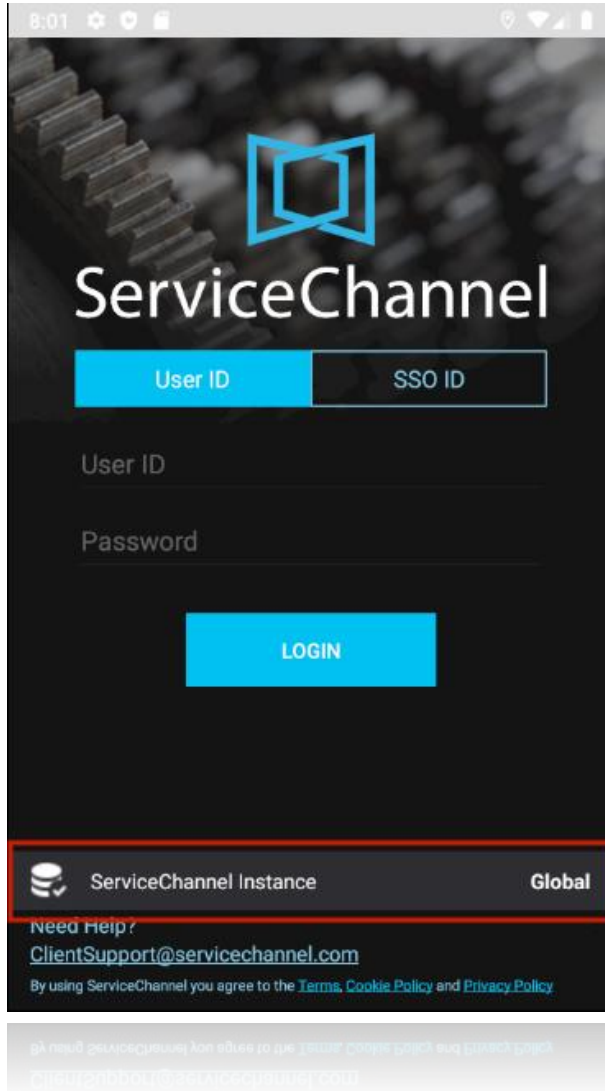
[Démarrer](#)

- ✓ Dashboard Training for Location Users
- ✓ ServiceChannel Mobile (Subscriber)*
- ✓ Provider Automation
- ✓ SC Provider (Mobile)*

* In Progress, more languages coming soon!  ServiceChannel®



Important Mobile Apps Update



ServiceChannel Mobile Apps users (both SC Mobile and SC Provider Mobile) will notice a new option on the bottom of the login screen to modify the data center settings. Please, unless led by a ServiceChannel team member, **do not attempt to change these settings as it could disrupt operations and potentially cause system downtime.**

Reminder: Microsoft IE 11 — Saying Goodbye

IE 11, the final version of the Internet Explorer product line, will be deprecated by Microsoft in mid-August 2021. Because of this, ServiceChannel will drop support for IE 11 on our platform. Consider using a supported browser — such as the current versions of Microsoft Edge, Google Chrome, Mozilla Firefox, or Apple Safari — as any issues related to IE 11 will no longer be eligible for support.

For more details, please see the **Microsoft Techcommunity Blog**:

<https://techcommunity.microsoft.com/t5/microsoft-365-blog/microsoft-365-apps-say-farewell-to-internet-explorer-11-and/ba-p/1591666>.



Find All Release Content on ServiceChannel University

ServiceChannel Home Recent Spaces People Apps

SCUniversity | Facility Teams

Overview

Space Settings

APPS

Insights

SPACE SHORTCUTS

- SCU Release Notes
- SCUniversity | Providers
- SC | Data Direct
- SCU | Global

Pages

- Getting Started with Service Automation
- Dashboard
- Service Automation Core Modules
- Service Automation Admin Modules
- ServiceChannel Mobile
- Service Automation Professional and Add-On Modules
- Watch & Learn
- Integration
- ServiceChannel System Requirements

Release Notes & Announcements

ServiceChannel

Search Release Notes here or use the Search bar on the upper right

- SERVICE AUTOMATION AND PROVIDER AUTOMATION**
View Release Notes
- SC MOBILE**
View Release Notes
- SC PROVIDER MOBILE**
View Release Notes
- PRODUCTCHANNEL**
We have major releases at least 3 times per year. This newsletter informs you of what has been released.
See the Announcements

NEED MORE HELP?
Submit a Ticket
ServiceChannel SLA

HELP DESK
Monday - Friday, 7:00 am - 7:00 pm ET
Facility Teams & Store Users
clientsupport@servicechannel.com
Contractors & Suppliers
contractorsupport@servicechannel.com

24/7 CALL CENTER & IVR
North America Call Center:
800-803-5822
Click Here for International Numbers
IVR Hotline: 516-600-7777

ProductChannel

We at ServiceChannel are excited to bring you **2021 Release 3 ("R3")**, slated for release in **mid July**. A summary of the new features is listed below.

➡ = **Contact your Customer Success Manager to unlock this feature.**

🌟 **JOIN US FOR THE R3 RELEASE WEBINAR ON TUESDAY, JULY 13** 🌟
[CLICK HERE TO REGISTER](#)

The Proposals List is Redesigned!

Fewer clicks, more visible data, real-time filtering

PROPOSAL MANAGER

Now, more in line with the Work Order and Invoice Lists, comes the **redesigned Proposals List!**

The new Proposals List comes with a cleaner user interface that provides you with better visibility into proposal data. Clicking the Proposals menu now leads straight to the redesigned list — 2 clicks less than before. From here, you will see the most important information placed first and visually highlighted for each proposal.

With this redesign, you can now filter proposals in real-time, and hone in on the ones you need to take action on without going back to the search page. We have also added **filtering by Amount, saving filters, and marking a saved filter as your default filter.**

The **Approve** action is now a separate button that's right on the Proposal List, making it faster for you to approve proposals without entering more menus. However, when **Proposal Recommendation** is enabled, you'll see either the Approve or Reject button based on the recommendation given. To take a different action, just click "More..."

[CLICK TO SHOW ALL FEATURES](#)

FILTER BY MODULE

- Work Orders
- Invoices
- Proposals
- Assets, Refrigerant Tracking, and Inventory
- Analytics and Data
- Admin
- FTM, Providers, and Compliance
- Mobile Apps
- Enhancements and Improvements

FILTER BY PACKAGE

- Essentials
- Add-Ons
- Professional



Would we need to update the GL code or will Vendors be able to input GL codes while invoicing?

You as the client will need to update the GL Code as the vendor will not have availability to view each of their client's GL codes

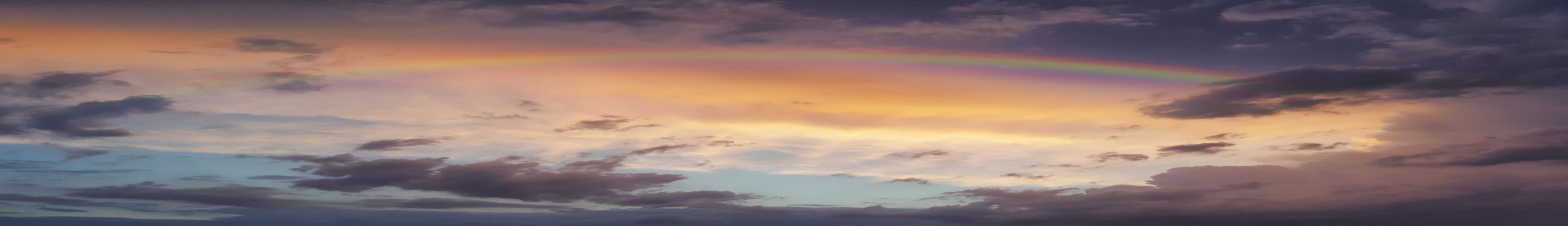
Is there a way to remove the "Select All" option? Some vendors will copy everyone they can, which causes problems.

We have removed the "select all" option from the WO email recipient list from the Provider side. When this feature goes live, providers will not be able to use this option. We are also working with our product team to include the Subscriber side as well so this is no longer an option to prevent email spam.

Helpful tip: if a user's email is included in the WO email recipient list and should be removed. You can do this from the user's permissions.

When will I begin receiving less emails in regards to the split notes notifications?

Once R3 rolls out on 7/20 - 7/22, this feature will go into effect for everyone.



Mark Your Calendars
R3 Planned Release
7/20 - 7/22

thank you