

System Update Notes

March 25, 2022

To address speed issues, this update makes changes in several areas of Service Autopilot. You'll notice that on some screens, we removed the automatic loading of data, which tends to bog down the system. You can still access the data when you need it.

We also made another update to the Dispatch Board's date filtering to address Member feedback. We appreciate your patience as we work to improve system performance!

Dispatch Board

The Dispatch Board's **Date Filter now allows searches of up to 90 days** rather than 31 days. This decision was made based on your feedback and further evaluation of system speed.

If you need to see a larger date range, two reports at **Report Center > SA Reports** might meet your needs:

- [Visits Report](#) lets you filter by Status and other attributes, and you can export it to Excel for further manipulation.
- [Job Costing Report](#) gives information about budgeted hours, times logged for completed jobs, and many other data points.

You can find articles on these reports and on building custom analyses in the [Help Center](#).

Activity Stream

On a Client Account screen, the **Activity Stream won't load automatically**. Instead, it will load after you scroll down to that area of the screen.

Custom Fields

On a Client Account screen, **custom fields will not appear automatically**. We added a **Show Details** link that you can click when you need to see the custom fields.

Client Portal

The **Client Portal no longer shows job attachments automatically** for historical jobs. We added a **View Attachments** link that you can click to see if a job has attachments.

We welcome your feedback!

We want to hear how these changes affect you, and what data points are missing, if any, when you try using the reports above to capture data that you've been getting from the Dispatch Board. If the filters or data on the reports don't meet your needs, let us know what you want to see.

Please email our Customer Success team at cs@serviceautopilot.com and title the email "Product Feedback." List the name of the report you want to talk about. Send as many details as you can about what you are missing from the Dispatch Board. Thank you for helping us to improve Service Autopilot.