

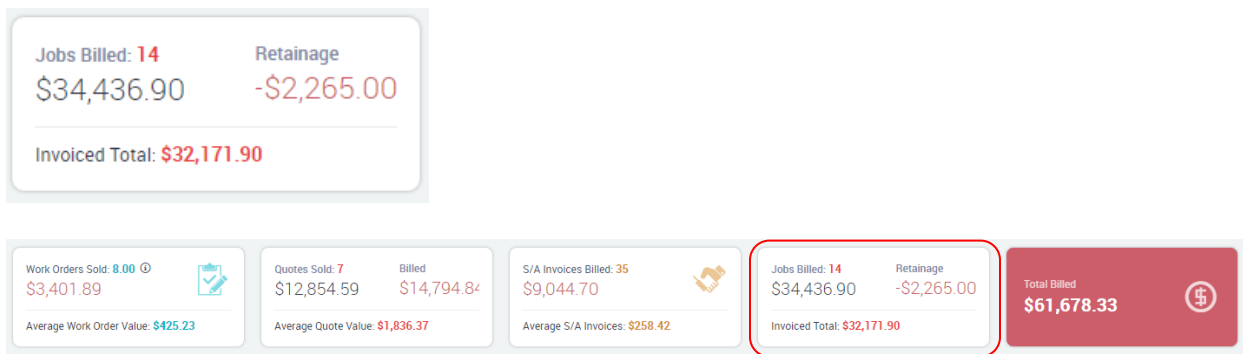
# SF Release Notes: April 27, 2020

## Dashboard – Top section now shows Project Management (Job Cost) Billing Information

**NOTE** – This information will only show if you are using the Project Management (Job Cost) Module. If you are not using the Project Management Module, this information will not appear.

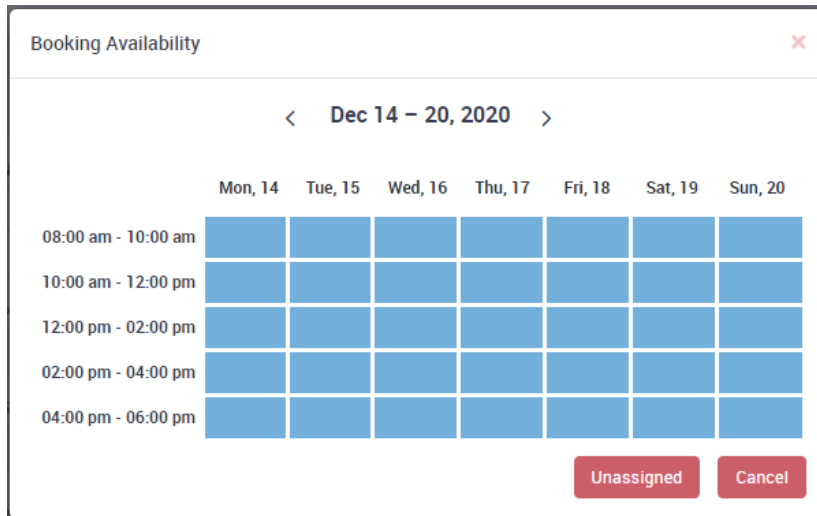
When you view the Dashboard, the top section now includes a box for Job Cost billing information for the current month. The information shown is the number of Jobs billed, the Gross Amount Billed, the Retainage withheld and the Net Amount billed (which is the amount that will hit your Accounts Receivables). The “Total Billed” on the far right uses the Gross Billed value, not the Net Billed value, which means the retainage is included in the value.

**Helpful Tip** – You can restrict an employee’s access to the Dashboard through the “Roles & Permissions” option under the Employee section in the Systems Settings.



## Dispatch Board – When using the Booking Availability Option, you can now schedule a call up to a year in advance.

When scheduling a “Promised Time” for a work order, you can now schedule a call up to a year out from the current date. Prior to this release, you could only assign a “Promised Time” up to 3 months out in the “Booking Availability” schedule. Please note, prior to this release you could always schedule calls out as far as you wanted, but could only assign a “Promised” date and time up to 3 months out. Now you can still schedule a call as far out as you want, with a “Promised” time of up to 1 year out.



If you were a member of our Value Club, you could have saved at least \$\$ today. Please ask your technician about becoming a Valued Club Member.

## Printing Invoices – The system can now print your Service Agreement Savings or Potential Savings on Invoices printed from the Office

When printing an invoice from the office, you now have the option to print the Service Agreement Savings or Potential Savings on the invoice. If you offer a savings, but do not want to print the savings on a particular invoice, you can turn the “Print Savings” slider to “No” and the savings will not print.

To set up the Savings and Potential Savings, go to the System Settings and choose “Pricing Setup” under the “Company” section. Enter your Savings text and Potential Savings text in the “Savings Note and Potential Savings Note” fields. In order to print the Dollar Amount, enter a “\$\$” in the text where you would like to the savings to print. For example: “You saved \$\$ today as a Service Agreement Customer”, or “You could have saved \$\$ today if you had a Service Agreement”. The system will automatically replace the “\$\$” with the actual dollar amount you saved.

**NOTE** – If you do not offer service agreement discounts, or you never want to print a “Savings” or “Potential Savings” on an invoice, leave the “Savings Note” and the “Potential Savings Note” fields blank and they will not print. You can elect to leave only one of the 2 fields blank, if you only want one or the other to ever print on invoices.

**NOTE 2** – If you offer multiple service agreements with different discount amounts, the system will use whatever “Agreement Discount” value you have set up in the “Agreement Discount %” field in the Company Pricing Setup screen to calculate the potential savings. For example, if you offer agreements that give a 10, 15 and 20% discount, you would set up one of the discount percentages in the Pricing Setup screen as your default, typically the lowest percentage. If that is the case, you would want to make your “Potential Savings” text reflect something like “You

could have saved at least \$\$ if you had a service agreement...”. Or if you enter the highest percentage of savings, you would want to use text such as “You could have saved as much as \$\$ if you had a service agreement...”. In both cases, you are letting the customer know either the minimum they could have saved or the maximum they could have saved.

**Invoice Notes**

**Savings Note**

As a Value Club Member, you saved \$\$ today. Tha

Enter \$\$ where you want savings to show

**Potential Savings Note**

If you were a member of our Value Club, you could

Enter \$\$ where you want potential savings to show

Timeline (Last: 04/26/2020, On Record: 6) | Timesheet (Worked: 0.02, Traveling: 0.02) | **Invoice** (Invoiced: \$557.17, Balance: \$557.17) | Payments (Total: \$0.00, Last Paid: None) | Quote (Accepted: None, Amount: \$0.00) | Purchase Order (Amount: \$0.00, LTD: \$0.00)

Invoice [Email] [Print] [Change Status] [Save]

Bill To: Whitman, Donna Profitability Details

Bill To Address: 4321 First Street, Anchorage, Alaska, 00021 (239) 555-8988

Terms: Due on receipt | Invoice Date: 04/26/2020 | Due Date: 04/26/2020

Invoice #: F-1640 | Customer PO #: 0 | Sales Rep: [dropdown] | Markup: Standard | Class: Residential

Business Entity: Res Plumbing Service

Print Savings  | Print Equipment

**Invoice Items**

	Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
☰	Truck 100	BRK001	2 P 30A Plug-in Breaker	1.00	51.38	51.38	<input checked="" type="checkbox"/>		Residential	<input checked="" type="checkbox"/>
☰	Truck 100	FI F004	30A 3 ph Fused	1.00	474.25	474.25	<input checked="" type="checkbox"/>		Residential	<input checked="" type="checkbox"/>

Description	Qty	Price (\$)	Amount (\$)
2 P 30A Plug-in Breaker	1.00	51.38	51.38
30A 3 ph Fused Disconnect	1.00	474.25	474.25

If you were a member of our Value Club, you could have saved at least \$52.56 today. Please ask your technician about becoming a Valued Club Member.

Sub Total	<b>\$525.63</b>
Tax ( 6.0000 % )	\$31.54
<b>Total</b>	<b>\$557.17</b>

**Message**

Description	Qty	Price (\$)	Amount (\$)
<b>Equipment ID: 200 - Bradford White - M/N: RG250T6N - S/N: 43836 - Right Side</b>			
2 P 40A Plug-in Breaker	1.00	74.45	74.45
Regular Time Labor @ \$150 per hour	1.75	135.00	236.25

As a Value Club Member, you saved \$34.52 today. Thank you for being a Value Club Member.

Sub Total	<b>\$310.70</b>
Tax ( 6.5000 % )	\$4.84
<b>Total</b>	<b>\$315.54</b>

## ServiceFactor Mobile - The system can now print your Service Agreement Savings or Potential Savings on Invoices printed from ServiceFactor Mobile

ServiceFactor Mobile will now give you the option to print the Service Agreement Savings or Potential Savings on the invoices. The customer will also be able to see the savings or potential savings when they are approving the work or signing for the work on the Invoice. If you do not want the savings or potential savings to print on the actual invoice, you can turn the Print Slider located under the savings or potential savings to No.

Invoice

RT Labor 125 Qty - 1 \$125.00  
Regular Time Labor @ \$125 per hour

MOT004 Qty - 1 \$250.00  
Condenser Motor - 1 Year Parts & Labor Warranty

Subtotal \$375.00  
Tax - TX-Plano-3057994 \$20.62  
**Total \$395.62**  
Minimum Due \$395.62  
Balance \$395.62

**If you were a member of our Value Club, you could have saved at least \$37.50 today. Please ask your technician about becoming a Valued Club Member.**

Print

Amount To Pay **\$395.62** >

[View Payment History](#)

Invoice

BLW110000 Qty - 1 \$426.00  
Replace 1/4 HP 1075 RPM 115V 3 Speed Blower Motor

CAP002 Qty - 1 \$16.36  
5 MFD Capacitor

Subtotal \$442.36  
Tax - FL-Lee \$0.98  
**Total \$443.34**  
Minimum Due \$443.34  
Balance \$443.34

**As a Value Club Member, you saved \$42.82 today. Thank you for being a Value Club Member.**

Print

Amount To Pay **\$443.34** >

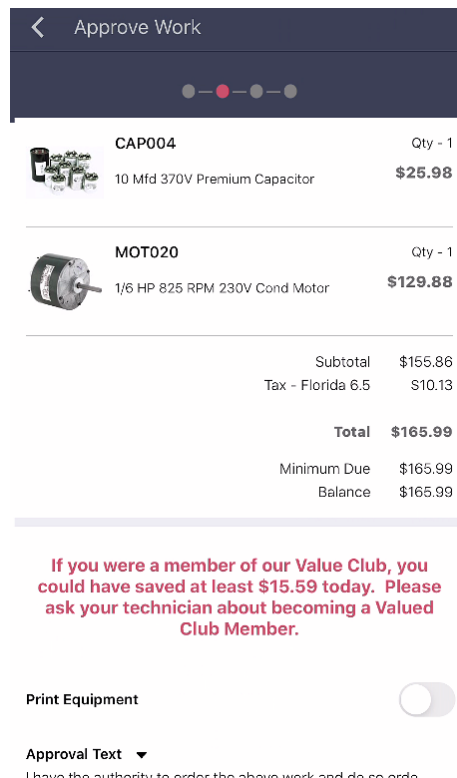
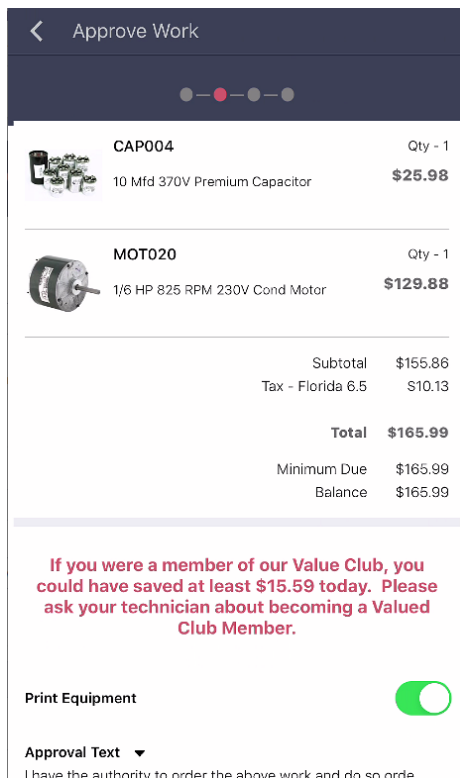
[View Payment History](#)

Description	Qty	Price (\$)	Amount (\$)
Replace 1/4 HP 1075 RPM 115V 3 Speed Blower Motor	1.00	426.00	426.00
5 MFD Capacitor	1.00	16.36	16.36
		Sub Total	<b>\$442.36</b>
		Tax ( 6.0000 % )	\$0.98
		Total	<b>\$443.34</b>

As a Value Club Member, you saved \$42.82 today. Thank you for being a Value Club Member.

## ServiceFactor Mobile – You now have an option if you do not want to print the Equipment Detail on an invoice

On a previous ServiceFactor Mobile release, the ability to print the Equipment Information on an invoice was added. In this release, a “Print Slider” was added so that if you do not want to print the Equipment Details on an invoice, you can turn the Print Slider to No and the information will not print on the invoice. The “Print Equipment” slider is located on the Approve Work screen and by default is always set to “Yes”. If you change the slider to “No”, the equipment information will not print on the invoice.



## Invoice printed with Equipment Listed

Description	Qty	Price (\$)	Amount (\$)
<b>Equipment ID: AC123 - Trane - M/N: 4TTR6045B - S/N: 74747484 - Right side of House</b>			
10 Mfd 370V Premium Capacitor	1.00	25.98	25.98
1/6 HP 825 RPM 230V Cond Motor	1.00	129.88	129.88
Sub Total			<b>\$155.86</b>
Tax ( 6.5000 % )			\$10.13
Total			<b>\$165.99</b>

If you were a member of our Value Club, you could have saved at least \$15.59 today. Please ask your technician about becoming a Valued Club Member.

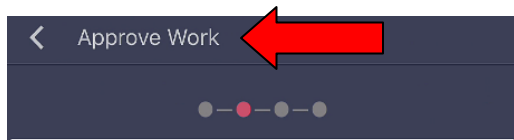
## Invoice printed without Equipment Listed

Description	Qty	Price (\$)	Amount (\$)
10 Mfd 370V Premium Capacitor	1.00	25.98	25.98
1/6 HP 825 RPM 230V Cond Motor	1.00	129.88	129.88
Sub Total			<b>\$155.86</b>
Tax ( 6.5000 % )			\$10.13
Total			<b>\$165.99</b>

If you were a member of our Value Club, you could have saved at least \$15.59 today. Please ask your technician about becoming a Valued Club Member.

**ServiceFactor Mobile – A “Signed By” field has been added to both the Approval Screen and the Invoice Screen so that you can manually enter the name of the person that signed the invoice.**

You can now type in the name of the person that signed both the Approval Screen and the Invoice Acceptance, which will print on the invoice. This can avoid any confusion as to who signed for the work if you can't read the signature. These fields are optional and do not have to be filled in if you so desire.



Print Equipment

Approval Text ▼  
I have the authority to order the above work and do so orde...

Authorization

*John Garvey*

Signed By

John Garvey



[View Payment History](#)

Acceptance ▼  
LIMITED WARRANTY: All materials, parts, and equipment a...

Authorization

*Sarah Garvey*

Signed By

Sarah Garvey

Description	Qty	Price (\$)	Amount (\$)
<b>Equipment ID: AC123 - Trane - M/N: 4TTR6045B - S/N: 74747484 - Right side of House</b>			
10 Mfd 370V Premium Capacitor	1.00	25.98	25.98
1/6 HP 825 RPM 230V Cond Motor	1.00	129.88	129.88

If you were a member of our Value Club, you could have saved at least \$15.59 today. Please ask your technician about becoming a Valued Club Member.

Sub Total	<b>\$155.86</b>
Tax ( 6.5000 % )	\$10.13
Total	<b>\$165.99</b>

**Message**

**Authorization**

I have the authority to order the above work and do so order as outlined above. It is agreed that the seller will retain title to any equipment or material furnished until final & complete payment is made. And if a settlement is not made as agreed, the seller shall have the right to remove the same and the seller will be held harmless for any damages resulting from the removal thereof.



Signature John Garvey

**Acceptance**

LIMITED WARRANTY: All materials, parts, and equipment are warranted by the manufacturers' or suppliers' written warranty only. All labor performed by the above-named company is warranted for 30 days or as otherwise indicated in writing. The above-named company makes no other warranties, express or implied, and its agents or technicians are not authorized to make any such warranties on behalf of the above-named company.



Signature Sarah Garvey

**Thank You For Your Business!**