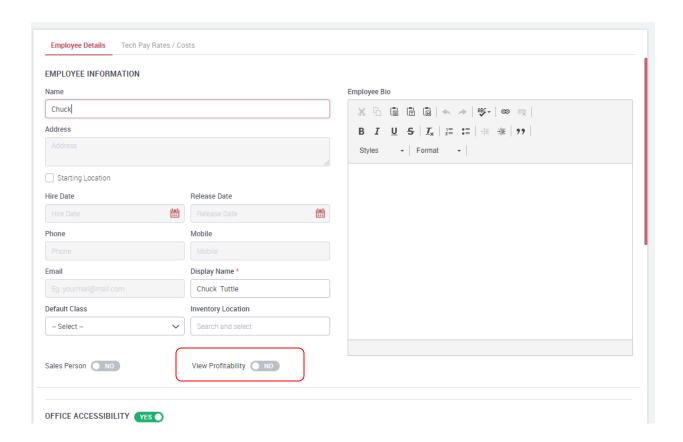
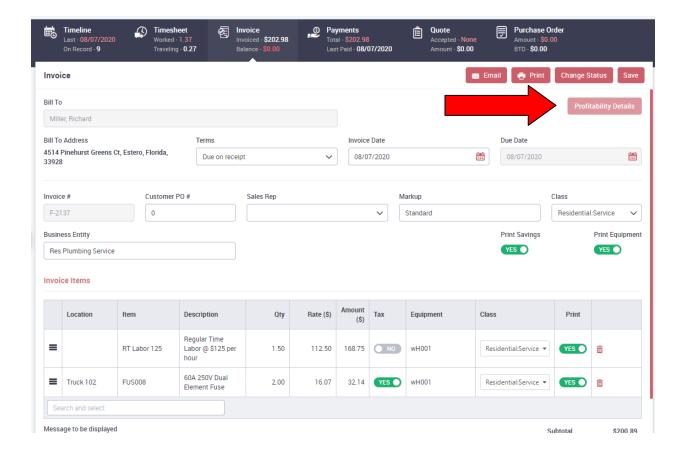
SF Release Notes: July 3, 2020

Invoice Profitability – You can now permission select employees out of seeing the Invoice Profitability Details

A new option has been added to the Employee Information file that will allow you to restrict the ability of an employee from seeing the Profitability Detail of an Invoice. In the employee file, there is a new slider called "View Profitability". If this slider is set to "Off", the "View Profitability" button on the Invoice will be "grayed out".

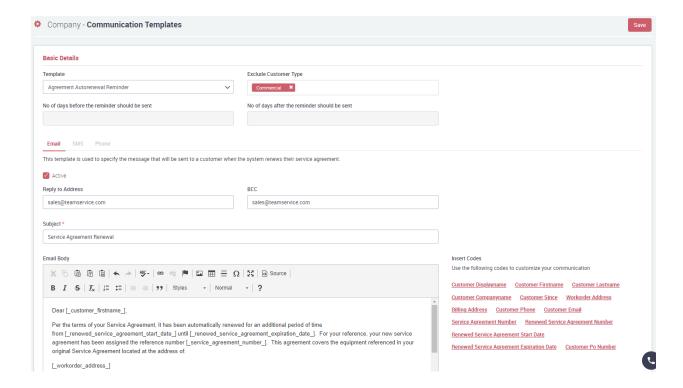




Communication Template – A new communication template has been added for Auto-Renewed Contracts

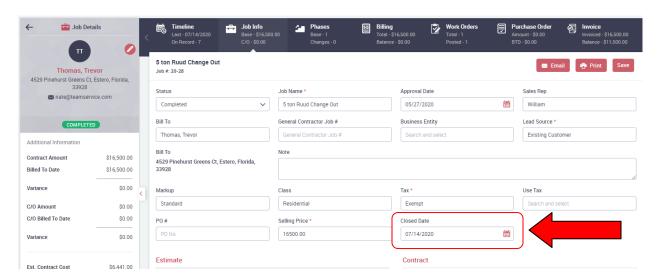
A new communication template has been added for sending out emails when a Service Agreement has been automatically renewed. Like with all templates, you can define the text that gets sent as well as exclude specific customer types from receiving reminders. When the Service Agreement is automatically renewed by the system, an email will be sent to the customer based on the text defined in the template.

To access the Communication Template, go to the Settings screen, choose Communication Templates from the Customer section and select "Agreement Auto Renewal Reminder from the drop down field.



Project Management – An Editable Closed Date field has been added to the Job

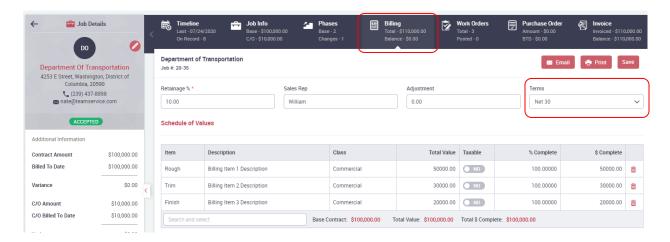
A new field has been added to the Project Management "Job Info" screen for tracking the "Closed" Date (aka Completed Date) of the Job. Prior to this release, the system would automatically use the date the Job was closed. The system will automatically fill in the Closed Date with the current date when you change the status to "Completed", however it can be overridden if necessary. The closed date is used



Project Management – Payment Terms have been added to the Billing and Invoice Screens

The Payment Terms have been added to the Billing and Invoice Screens of the Project Management system. Prior to this release, the payment terms were based on the Terms defined in the Customer File, and could not be edited or changed on a Job. Now, when adding a job, the system will pull the Terms over from the Customer File, but they can be edited in the Billing Screen for the overall Job, or in the Invoice Screen for an individual invoice, if applicable.

Billing Screen



Invoice Screen

