

# 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”.

The screenshot displays the 'Employee Details' form in Salesforce. The form is divided into two main sections: 'EMPLOYEE INFORMATION' and 'Employee Bio'. The 'EMPLOYEE INFORMATION' section contains various input fields for personal and contact details, including Name, Address, Hire Date, Release Date, Phone, Mobile, Email, Display Name, Default Class, and Inventory Location. At the bottom of this section, there are two toggle switches: 'Sales Person' (set to NO) and 'View Profitability' (set to NO). The 'View Profitability' toggle is highlighted with a red rectangular box. The 'Employee Bio' section features a rich text editor with a toolbar containing icons for text formatting (bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, quote) and a 'Format' dropdown menu. The bottom of the form includes an 'OFFICE ACCESSIBILITY' toggle set to YES.

Timeline  
Last - 08/07/2020  
On Record - 9
 Timesheet  
Worked - 1.37  
Traveling - 0.27
 Invoice  
Invoiced - \$202.98  
Balance - \$0.00
 Payments  
Total - \$202.98  
Last Paid - 08/07/2020
 Quote  
Accepted - None  
Amount - \$0.00
 Purchase Order  
Amount - \$0.00  
BTD - \$0.00

**Invoice**

**Bill To**  
Miller, Richard

**Bill To Address**  
4514 Pinehurst Greens Ct, Estero, Florida, 33928

**Terms**  
Due on receipt

**Invoice Date**  
08/07/2020

**Due Date**  
08/07/2020

**Invoice #**  
F-2137

**Customer PO #**  
0

**Sales Rep**  
[Dropdown]

**Markup**  
Standard

**Class**  
Residential:Service

**Business Entity**  
Res Plumbing Service

**Print Savings**

**Print Equipment**

**Invoice Items**

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
	RT Labor 125	Regular Time Labor @ \$125 per hour	1.50	112.50	168.75	<input type="checkbox"/>	WH001	Residential:Service	<input checked="" type="checkbox"/>
Truck 102	FUS008	60A 250V Dual Element Fuse	2.00	16.07	32.14	<input checked="" type="checkbox"/>	WH001	Residential:Service	<input checked="" type="checkbox"/>

Search and select

Message to be displayed

Subtotal \$200.89

## 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.

Company - Communication Templates Save

**Basic Details**

Template: Agreement Autorenewal Reminder Exclude Customer Type: Commercial

No of days before the reminder should be sent:  No of days after the reminder should be sent:

**Email** SMS Phone

This template is used to specify the message that will be sent to a customer when the system renews their service agreement.

Active

Reply to Address: sales@teamservice.com BCC: sales@teamservice.com

Subject: Service Agreement Renewal

**Email Body**

Dear [\_customer\_firstname\_]

Per the terms of your Service Agreement, it has been automatically renewed for an additional period of time from [\_renewed\_service\_agreement\_start\_date\_] until [\_renewed\_service\_agreement\_expiration\_date\_]. For your reference, your new service agreement has been assigned the reference number [\_service\_agreement\_number\_]. This agreement covers the equipment referenced in your original Service Agreement located at the address of:

[\_workorder\_address\_]

**Insert Codes**

Use the following codes to customize your communication

[Customer Displayname](#) [Customer Firstname](#) [Customer Lastname](#)  
[Customer Companyname](#) [Customer Since](#) [Workorder Address](#)  
[Billing Address](#) [Customer Phone](#) [Customer Email](#)  
[Service Agreement Number](#) [Renewed Service Agreement Number](#)  
[Renewed Service Agreement Start Date](#)  
[Renewed Service Agreement Expiration Date](#) [Customer Po Number](#)

## 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

Job Details

**Thomas, Trevor**  
4529 Pinehurst Greens Ct, Estero, Florida, 33928  
nate@teamservice.com

**COMPLETED**

Additional Information

Contract Amount	\$16,500.00
Billed To Date	\$16,500.00
Variance	\$0.00
C/O Amount	\$0.00
C/O Billed To Date	\$0.00
Variance	\$0.00
Est. Contract Cost	\$6,441.00

**5 ton Ruud Change Out**  
Job #: 20-28

Status: Completed Job Name: 5 ton Ruud Change Out Approval Date: 05/27/2020 Sales Rep: William

Bill To: Thomas, Trevor General Contractor Job #: General Contractor Job # Business Entity: Search and select Lead Source: Existing Customer

Bill To: 4529 Pinehurst Greens Ct, Estero, Florida, 33928

Markup: Standard Class: Residential Tax: Exempt Use Tax: Search and select

PO #: PO No. Selling Price: 16500.00 Closed Date: 07/14/2020

**Estimate** Contract

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# 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

Department of Transportation  
Job #: 20-35

Retainage % \*  Sales Rep  Adjustment  Terms

Item	Description	Class	Total Value	Taxable	% Complete	\$ Complete
Rough	Billing Item 1 Description	Commercial	50000.00	<input type="radio"/> NO	100.00000	50000.00
Trim	Billing Item 2 Description	Commercial	30000.00	<input type="radio"/> NO	100.00000	30000.00
Finish	Billing Item 3 Description	Commercial	20000.00	<input type="radio"/> NO	100.00000	20000.00

Base Contract: \$100,000.00 Total Value: \$100,000.00 Total \$ Complete: \$100,000.00

## Invoice Screen

Department of Transportation  
Job #: 20-35

Bill To: Department Of Transportation  
Bill To Address: 4253 E Street, Washington, 20590

Invoice #  Invoice Date  Period To

Terms  PO #  Retainage %

Sales Rep  Bill Retainage  YES

Source	Description	Total Value	% Complete	\$ Complete	\$ Retainage	Taxable	Class
Phase	Billing Item 1 Description	50000.00	100.00000	50000.00	0.00	<input type="radio"/> NO	Commercial
Phase	Billing Item 2 Description	30000.00	100.00000	30000.00	0.00	<input type="radio"/> NO	Commercial
Phase	Billing Item 3 Description	20000.00	100.00000	20000.00	0.00	<input type="radio"/> NO	Commercial
Change	Upgrade Equipment	10000.00	100.00000	10000.00	0.00	<input type="radio"/> NO	Commercial

	Base Contract	Change Orders
Sell Price	\$100,000.00	\$10,000.00
Billed TD	\$100,000.00	\$10,000.00
Open (Diff)	\$0.00	\$0.00
% Billed	100.00%	100.00%
Retainage	\$10,000.00	\$1,000.00

100.00 % Billed Complete (including this invoice)	\$110,000.00
Retainage (This Invoice)	\$11,000.00
Previously Invoiced	\$110,000.00
Subtotal	\$11,000.00
Tax	\$0.00
Total due this Invoice	\$11,000.00