


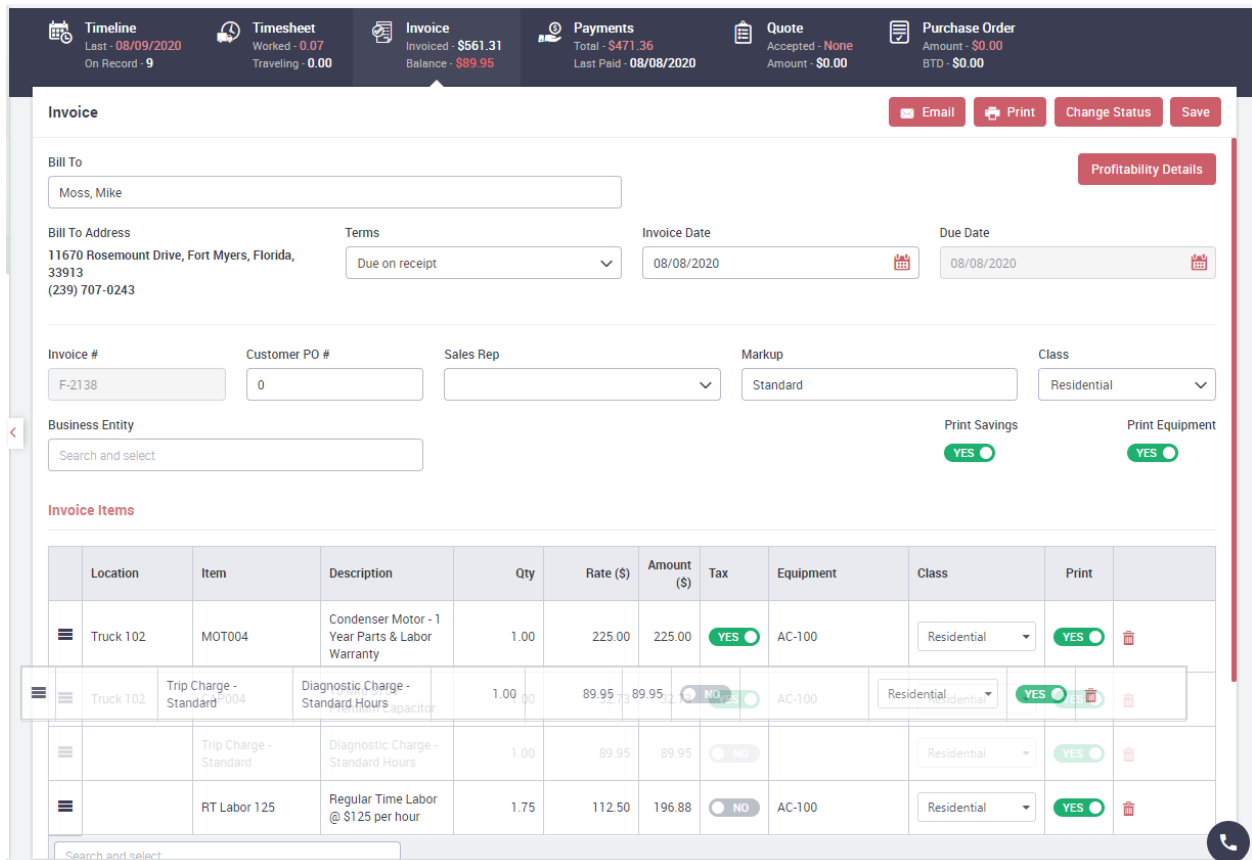
SF Release Notes: August 10, 2020

Invoices – You can now re-arrange the order of items on Invoices





With this release, you now have the ability to re-arrange the order of items on invoices if necessary. To change the order of items, simply click and drag the “hamburger” icon (the three horizontal lines to the left of the item name) for the line item you would like to re-arrange, and drop it where you would like it to appear. This will place the item in the selected position and shift all other lines items up, or down as applicable.

 This image is what the “hamburger” icon looks like

In the image below, you will notice the “Trip Charge” is being dragged from the it’s original position on the invoice to a new position.



The screenshot displays the SF software interface for an invoice. At the top, there are navigation tabs for Timeline, Timesheet, Invoice, Payments, Quote, and Purchase Order. The Invoice tab is active, showing details such as Invoiced amount (\$561.31), Balance (\$89.95), and Invoice Date (08/08/2020). Below the navigation, there are buttons for Email, Print, Change Status, and Save. The main section is titled "Invoice" and contains fields for Bill To (Moss, Mike), Bill To Address (11670 Rosemount Drive, Fort Myers, Florida, 33913, (239) 707-0243), Terms (Due on receipt), Invoice Date (08/08/2020), and Due Date (08/08/2020). There is also a "Profitability Details" button. Below these fields, there are fields for Invoice # (F-2138), Customer PO # (0), Sales Rep, Markup (Standard), and Class (Residential). There are also checkboxes for Print Savings (YES) and Print Equipment (YES). The "Invoice Items" section contains a table with the following data:

	Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
	Truck 102	MOT004	Condenser Motor - 1 Year Parts & Labor Warranty	1.00	225.00	225.00	YES	AC-100	Residential	YES
	Truck 102	Trip Charge - Standard 004	Diagnostic Charge - Standard Hours	1.00	89.95	89.95	NO	AC-100	Residential	YES
		Trip Charge - Standard	Diagnostic Charge - Standard Hours	1.00	89.95	89.95	NO		Residential	YES
		RT Labor 125	Regular Time Labor @ \$125 per hour	1.75	112.50	196.88	NO	AC-100	Residential	YES

Quotes – You can now re-arrange the order of items on Quotes

Like with Invoices on this release, you now have the ability to re-arrange the order of items on quotes if necessary. To change the order of items, simply click and drag the “hamburger” icon (the three horizontal lines to the left of the item name) for the line item you would like to re-arrange, and drop it where you would like it to appear. This will place the item in the selected position and shift all other lines items up, or down as applicable.

☰ This image is what the “hamburger” icon looks like

In the image below, you will notice the “Trip Charge” is being dragged from the it’s original position on the quote, to a new position.

The screenshot displays a software interface for managing quotes. At the top, there are navigation tabs for Timeline, Timesheet, Invoice, Payments, Quote, and Purchase Order. The Quote tab is active, showing a quote with a status of 'Pending'. Below the navigation, there are fields for Bill To (Robbins, Martha), Bill To Address (5868 Cocos Dr, Fort Myers, Florida, 33908), Quote Date (05/06/2020), Expiration Date (06/06/2020), and Follow-up Date (05/06/2020). There are also dropdown menus for Quote # (367), Business Entity, Sales Rep (Bobby), Lead Source (Existing Customer), PO #, Class, Markup (Standard), and Problem Code (Insp 1). Below these fields, there is a 'Quote Items' table with columns for Item, Description, Qty, Rate (\$), Amount (\$), Tax, Equipment, Class, and Print. The table contains five items, including 'WTS110000' (Install NEST Wifi Thermostat), 'DIA110010' (Trip Charge), 'RUN110100' (370 or 440 Multi Capacitors), 'CON110015' (Replace 1/4 HP 1075 RPM 230V Condenser Fan Motor), and another 'DIA110010' (Trip Charge). A 'Trip Charge' item is being dragged from its original position to a new position above the '370 or 440 Multi Capacitors' item. The interface also includes a 'Mobile' button and a 'Pending' dropdown menu.

Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print	
WTS110000	Install NEST Wifi Thermostat	1.00	572.00	572.00				YES	🗑️ ✓
DIA110010	Trip Charge	1.00	82.00	82.00				YES	🗑️ ✓
RUN110100	370 or 440 Multi Capacitors	1.00	137.00	137.00				YES	🗑️ ✓
CON110015	Replace 1/4 HP 1075 RPM 230V Condenser Fan Motor	1.00	354.00	354.00				YES	🗑️ ✓
DIA110010	Trip Charge	1.00	82.00	82.00				YES	🗑️ ✓

Flat Rate – You now have the ability to change the quantity sold of Flat Rate items on an Invoice, as well the ability to change which item you want to be the “Primary Item”

The quantity of Flat Rate items sold on invoices can now be changed. Prior to this release, the quantity was restricted to “1” and if you sold the same Flat Rate repair more than once, you would need to add it multiple times on the Invoice. With this release, you can now change the quantity to however many you sold. The reason for this restriction had to do with how the system tracked the “Primary Repair”, which could have a different sell price than subsequent repairs, depending on how you have your Flat Rate setup.

With the ability to change the Flat Rate Quantity, you can also change which Flat Rate item is being sold as the “Primary” Repair. By default, the first Flat Rate repair you add to an invoice will be considered the “Primary” repair, and will have a “green” check mark, indicating it is the Primary Repair. Additional Flat Rate repairs added will have a “gray” check mark, which indicates they are not the Primary Repair. If you want to change the primary repair to a different item, click the gray check mark for the item you want to make the primary and answer the verification screen in the affirmative.

NOTE – The primary repair only matters if your Flat Rate is set up to charge a different price for the first repair, than subsequent repairs. If you charge the same price whether the repair is the first repair or second repair, you do not need to worry about which repair is the Primary Repair.

NOTE 2 – If your company charges a different price for the Primary Flat Rate Repair as opposed to subsequent repairs, and you sell the Primary Repair multiple times on an invoice, you may want to add the item twice on your invoice. The first time you add it (if it is the “Primary Repair”), it will charge a higher price. If you sold a quantity of 3 (for example) of the primary repair, it is going to charge the higher price multiplied by 3. If you add the Primary Repair as the first Flat Rate item on an invoice with a quantity of one, and add the same repair a second time with quantity of 2, the system will charge the higher price for the Primary Repair and the lower price for the additional 2 on the second line.

Invoice Items

	Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print	
☰	Main	DIA110010	Trip Charge	1.00	132.00	132.00			Residential	YES	🗑️ ✓
☰	Main	CON110015	Replace 1/4 HP 1075 RPM 230V Condenser Fan Motor	1.00	354.00	354.00			Residential	YES	🗑️ ✓
☰	Main	RUN110040	Replace 3 to 7.5 MFD 440V Oval Run Capacitor	1.00	105.00	105.00			Residential	YES	🗑️ ✓
☰	Main	DSP110005	Replace 1" Disposable Fiberglass Filter	4.00	11.00	44.00			Residential	YES	🗑️ ✓

Search and select

Payroll – Auto Overtime Adjustment has been added to the Payroll Time Entries Screen

A new feature has been added to the Payroll Time Entries Screen that will automatically adjust any hours over 40 from Regular Time to Overtime. The time adjustments will be updated back to the appropriate Work Order, which will adjust the overall profitability of the affected Work Order(s). The time frame that includes the 40th hour will automatically be adjusted to the proper time to make it 40 hours and will add a new record to the Work Order for the remaining time, and make it Overtime. You will be able to tell which line was adjusted, as it will be highlighted in “Orange” and any records that were automatically changed from Regular Time to Overtime will be highlighted in “Green”. To adjust the time, bring up a week’s worth of time in the Employee Time Entries screen and click the “Adjust to Overtime” button.

NOTE – The “Adjust to Overtime” button is only available if you select a 7 day time period in the “From and To” fields at the top of the screen. If you pay payroll every 2 weeks and you want to use the “Auto Adjust” feature, you will need to run the process in 2 steps. Select the first week of payroll and click the button to adjust. Then select the second week of payroll and repeat the process.

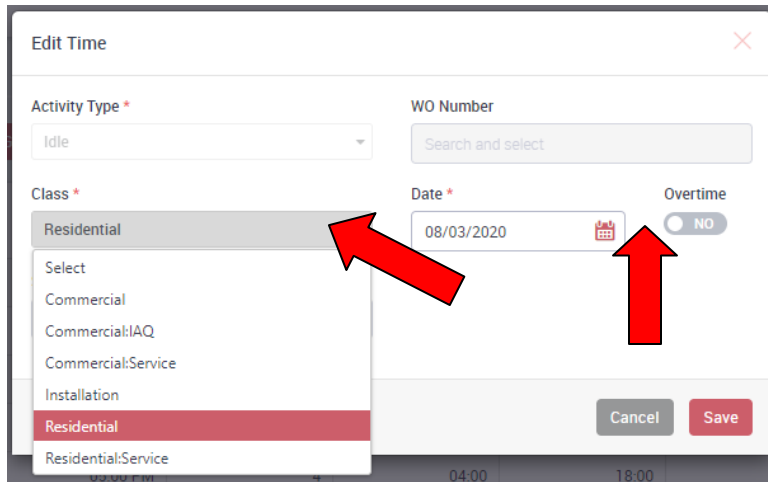
Helpful Tip: If you want to manually change one line of data from Regular Time to OT or vice versa, you can click the “Overtime” slider in the Time Entries Screen to turn OT On or Off.

In the Image Below, the orange line’s End Time was changed from 3:30 PM to 2:54 PM and a new line was added for the adjusted Work Order with a Start Time of 2:54 PM and an End Time of 3:30 PM and the Overtime Slider was set to “on”. The green lines indicate which records were changed from Regular Time to Overtime.

Date	Description	Start Time	End Time	Duration (Hrs)	Duration (Hrs:Mins)	Accumulated RT (Hrs:Mins)	Accumulated OT (Hrs:Mins)	Overtime	Class	Actions
08/03/2020	Working at WO-2456	08:00 AM	11:30 AM	3.5	03:30	03:30	00:00	<input type="radio"/> NO	Residential	
08/03/2020	Idle	11:30 AM	12:05 PM	0.58	00:34	04:04	00:00	<input type="radio"/> NO	Residential	
08/03/2020	Working at WO-2434	12:05 PM	05:30 PM	5.42	05:25	09:30	00:00	<input type="radio"/> NO	Residential	
08/04/2020	Working at WO-2479	08:00 AM	12:30 PM	4.5	04:30	14:00	00:00	<input type="radio"/> NO	Commercial	
08/04/2020	Working at WO-2479	01:00 PM	05:00 PM	4	04:00	18:00	00:00	<input type="radio"/> NO	Commercial	
08/05/2020	Working at WO-2479	08:00 AM	12:00 PM	4	04:00	22:00	00:00	<input type="radio"/> NO	Commercial	
08/05/2020	Working at WO-2479	12:30 PM	05:45 PM	5.25	05:15	27:15	00:00	<input type="radio"/> NO	Commercial	
08/06/2020	Idle	04:05 AM	04:12 AM	0.12	00:07	27:22	00:00	<input type="radio"/> NO	Residential	
08/06/2020	Idle	04:38 AM	06:23 AM	1.75	01:45	29:07	00:00	<input type="radio"/> NO	Residential	
08/06/2020	Working at WO-2467	08:00 AM	11:45 AM	3.75	03:45	32:52	00:00	<input type="radio"/> NO	Commercial-Service	
08/06/2020	Traveling at WO-2468	11:45 AM	12:08 PM	0.38	00:22	33:15	00:00	<input type="radio"/> NO	Commercial-Service	
08/06/2020	Working at WO-2468	12:08 PM	04:43 PM	4.58	04:34	37:49	00:00	<input type="radio"/> NO	Commercial-Service	
08/06/2020	Working at WO-2479	12:44 PM	02:54 PM	2.17	2:17	40:00	00:00	<input type="radio"/> NO	Commercial	
08/06/2020	Working at WO-2479	02:54 PM	03:30 PM	0.6	0:60	40:00	00:36	<input checked="" type="radio"/> YES	Commercial	
08/07/2020	Working at WO-2457	08:00 AM	11:46 AM	3.77	03:46	40:00	04:22	<input checked="" type="radio"/> YES	Residential	
08/07/2020	Working at WO-2479	08:20 AM	12:16 PM	3.93	03:55	40:00	08:18	<input checked="" type="radio"/> YES	Commercial	
08/07/2020	Working at WO-2479	12:57 PM	04:12 PM	3.25	03:15	40:00	11:33	<input checked="" type="radio"/> YES	Commercial	

Payroll Time Entries – When adding or editing payroll time in the Time Entries Edit Time Screen, you now have the option to change the Class or Adjust the time to Overtime

When adding or editing Payroll Times, you can now change the Class and/or the Overtime Flag directly in the Edit Time screen. Prior to this release, the class came directly from the class associated with the Work Order and you could not change it.



The screenshot shows the 'Edit Time' interface. At the top, there is a title bar with 'Edit Time' and a close button. Below this, there are several input fields: 'Activity Type *' with a dropdown menu showing 'Idle', 'WO Number' with a search box, 'Class *' with a dropdown menu showing 'Residential' and a list of other options, 'Date *' with a date picker showing '08/03/2020', and 'Overtime' with a toggle switch set to 'NO'. At the bottom, there are 'Cancel' and 'Save' buttons. Two red arrows point to the 'Class' dropdown and the 'Overtime' toggle.

Work Order File – The “Class” selection has been added to the Work Order and Timesheet screens

The Class can now be edited when adding a new Work Order, or from the Timesheet screen of the Work Order file. Prior to this release, you could only change the Class on the Invoice itself. When you change the Class, you will be prompted if you want to update the class for items that have not yet been transferred to accounting. If you answer yes, all items in the Timesheet and Invoice Screens that have not been transferred to accounting will be changed. If you answer no, existing items will still use the prior class, but any new items added to the Timesheet or Invoice screen will use the new class.

Helpful Tip: You can change the Class for a single line item by clicking the class on the particular line item and choosing the new class from the Drop Down list. This is helpful if you have a call that you worked on both HVAC and Electrical for example, and you want to separate the costs and incomes accordingly.

Create Workorder Save Schedule

Moss, Mike
 11670 Rosemount Drive, Fort Myers, Florida, 33913
 (239) 707-0243 | nmtuttle@earthlink.net

Work Order Invoice

Additional Information History

Payment Status
 Overdue \$ 54,393.66 Open \$ 54,393.66

Agreement
 SA-100-01 - Gold 1 Annual
 Mar 2020 - Mar 2021

Name / Description: Mike Mobile: (239) 707-0243 Phone: Email: nmtuttle@earthlink.net

Problem Code: Res - No Cool Class: Residential Estimated Time: 02:00 Priority: Search and select

Lead Source: Search and select Business Entry Quote Number: Enter Quote Number

Zone: Gateway Color:

Problem Reported:

Timesheet Worked - 1.57 Traveling - 0.50

Invoice Invoiced: \$561.31 Balance: \$89.95 Payments Total: \$471.36 Last Paid: 08/08/2020 Quote Accepted: None Amount: \$0.00 Purchase Order Amount: \$0.00 LTD: \$0.00

Timesheet Class: Residential Print Export

Total hrs: 2.07 hrs Working hrs: 1.57 hrs Traveling hrs: 0.50 hrs

Technician	Status	Start Date	Start Time	End Date	End Time	Class	Total	Overtime
Nate	Traveling	08/08/2020	08:11 AM	08/08/2020	08:41 AM	Residential	0.5 hrs	YES
Nate	Working	08/08/2020	08:41 AM	08/08/2020	10:15 AM	Residential	1.57 hrs	YES

Search and select

Reports – Reports have been completely revamped

Reports and their interface have been completely rewritten with this release and will no longer automatically be generated with pre-defined information when you select a report to run. Now when you select a report, you will need to click the “Go” button in order to generate the report, which allows you the chance to fill in your own selection criteria as opposed to it first running with pre-defined criteria. The new reports also allow you to drill down into particular records, such as the Work Order associated with the report, the Customer, the Job, the Inventory Item, etc. A good example of when you might want to drill into the record is if you are looking at a Profitability Report and you notice that the profitability seems off. With a simple click (see the Helpful Tip below), you can bring up the particular Work Order to review the details and determine why your numbers are off.

If you click the “Show Description” link when looking at the “Report List”, the screen will show you a brief description of each report. This will help you get an idea of what each report does before running it.

Helpful Tip: If you click on a link in the Report, it will take you to the link in the same screen you are on, and will lose your report. However, if you Right Click the report, you will have an option to “Open Link in New Tab”. If you select this option, the link will be opened in a new tab, leaving the original tab still on the report. When you are finished reviewing the link, you can close that tab, and go back to your original tab. **NOTE** – If your mouse has a wheel, you can click the “Wheel” and the system should automatically open the link in a new tab for you. This is dependent on your hardware, and if it does not work for you, use the Right Click option.

Report listing with the Description Hidden

Reports List [Show Descriptions](#)

Work Order Reports	Contract Reports	Equipment Reports
Customer Reports	Inventory Reports	Technician Reports
Accounting Reports	Quote Reports	Project Management Reports

Scheduled Calls Report Problem Code Usage Report Work Order Invoices Work Order Profitability Report Item Usage Report Dispatch Status Report
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Report Listing showing the Descriptions

Reports List [Hide Descriptions](#)

Work Order Reports	Contract Reports	Equipment Reports
Customer Reports	Inventory Reports	Technician Reports
Accounting Reports	Quote Reports	Project Management Reports

Scheduled Calls Report	This report lists the Work Orders that have been scheduled on the Dispatch Board for the selected dates. The information on the report includes the Taken Date, Work Order #, Site Name, Phone Number, Zone, Technician, Scheduled Date and Time, the Site Address and Status. If you elect to show additional information, the report will show the Problem Code, Estimated Time and second phone number.
Problem Code Usage Report	This report lists Work Orders according to their Problem Codes, which identify the general nature of the service requested by the customer. Each Problem Code will be subtotaed, which will be useful for analyzing how many calls of each problem code you have received within a given date range.
Work Order Invoices	This report allows you to reprint invoices without having to go into the customer or work order file. You will need to enter the original work order number to reprint an invoice.
Work Order Profitability Report	This report shows the Sale, Cost and Profit by dollar amount and percentage, as well as the total hours and average revenue per hour for the work orders selected. This report also shows the Lead Technician that was assigned to the Work Order, as well as the Lead Source. If you select the Additional Selections option, you will be able to subtotal the report by various options, such as the Lead Source, Business Entity or Lead Technician.
Item Usage Report	This report shows all items that were used on selected Work Orders as well as what Inventory Location the item came from if it is an Inventory Item. By default, this report will show all item types, but you can narrow it down to specific item types, such as Inventory, Non-Inventory, Flat Rate, etc., as well as Cost Types, such as Material, Labor, Subcontractor or Other through the report filters. This report will show both the Cost of the items as well as the total Sell Price.
Dispatch Status Report	This report will list the individual Dispatch Statuses of Work Orders for particular dates. The information on this report includes the Work Order #, Site Name, Site Phone Number, Zone, Technician, Date, Problem Code and the Dispatch Status. NOTE – Dispatch Statuses are different than Work Orders statuses and include the following statuses: Pending, Traveling, Working, Paused, Completed, Canceled and Incomplete.

Sample of new report – Clicking on the blue hyperlink will open up the particular record

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Missed Inspection Report

Site Name	Contact Name	Phone	Zip Code	Sched Date	Agreement Type	Agreement #	Problem Code	Confirm	Active
Richards, Sean	Sean		33928	04/01/20	GOLD1M	SA-216	Insp 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Rogers, Jennifer	Jennifer Home		27954	03/11/20	GOLD1M	SA-200	Insp 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Henderson, Bill	Bill		33913	04/01/20	GOLD1A	SA-186	Insp 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Smith, Betty	Betty	(214) 555-1515	75023	07/15/20	GOLD1A	SA-241	Insp 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alco, Jonathan	Jon	(214) 555-7847	75023	07/15/20	GOLD1A	SA-242	Insp 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Johnson, Jerry	Billy		75023	07/30/20	GOLD1A	SA-274	Insp 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Patel, Rikesh	Rikesh Home	(817) 555-4747	75075	05/01/20	GOLD2A	SA-327	Insp 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adamson, John	John	(239) 768-0343	33903	05/05/20	GOLD1A	SA-334	Insp 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Colon, George	George Colon	(818) 837-0022	91340	06/01/20	AAA	SA-343	Insp 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cunningham, Randy	Randy		33928	06/12/20	GOLD1A	SA-353	Insp 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Adams, Melanie	Melanie	(239) 654-2887	33913	08/01/20	GOLD1A	SA-328	Insp 1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

11 Missed Inspections 150.00

Reports – Project Management Reports have been fully implemented

The Project Management Reports have been fully implemented and now include detailed selection filters for each report.

Reports List [Show Descriptions](#)

Work Order Reports

Contract Reports

Equipment Reports

Customer Reports

Inventory Reports

Technician Reports

Accounting Reports

Quote Reports

Project Management Reports

- [Project Management Direct Charge Report](#)
- [Project Management Labor Detail Report](#)
- [Project Management Item Usage Report](#)
- [Project Management Use Tax Report](#)
- [Project Management Billing Report](#)
- [Project Management Invoice Report](#)
- [Project Management Profitability Report](#)
- [Project Management Over/Under Bonding Report](#)

Reports – Technician Unavailable Time Report has been added

A new Technician Unavailable Time Report has been added under the Technician Reports section. This report will list any Unavailable Time recorded for technicians in the Dispatch Board for the Dates Selected. It will display the Technician, Date, Start Time, End Time, Description of the Unavailable Time and the Duration.

Helpful Tip: The Unavailable Description is a free formed field, so it is recommended when entering Unavailable time, you use something consistent for the description. For example, for paid Leave time, you could use descriptions such as “Leave – Dr. Appt”, “Leave – Vacation”, “Leave – Kids school function”, etc. This way if you want to run a report and only list “leave time” items, you could use “leave” in the description field, and it will only list Unavailable time that started with the word Leave.

Sunday, August 9, 2020

Technician Unavailable Time Report

1/1

Technician	Date	Start Time	End Time	Description	Duration
Brett	03/18/2019	05:00 PM	11:00 PM	Personal Time	6 hrs
Brett	03/27/2019	02:30 PM	07:45 PM	Dr Appt	5.25 hrs
Brett	04/05/2019	03:00 PM	11:00 PM	Sick (Hungover)	8 hrs
Brett	04/29/2019	01:00 PM	11:00 PM	Vacation	10 hrs
Brett	04/09/2019	06:00 PM	11:00 PM	Personal Leave	5 hrs
Brett	07/31/2019	04:00 PM	10:00 PM	Personal Time	6 hrs
Brett	09/06/2019	06:15 PM	10:00 PM	Sick	3.75 hrs
Brett	12/16/2019	04:00 PM	08:00 PM	Personal Time	4 hrs
Brett	03/27/2020	01:00 PM	04:00 PM	daylight	3 hrs
Brett	03/25/2020	01:00 PM	02:00 PM	test	1 hrs
Brett	04/30/2020	02:45 PM	04:15 PM	Leave - Dr	1.5 hrs
Brett	06/24/2020	12:00 PM	10:00 PM	Personal Time	10 hrs
Totals for: Brett					63.50 hrs

ServiceFactor Mobile – Ability to Change the Quantity of Flat Rate Items

The quantity of Flat Rate items sold on invoices can now be changed. Prior to this release, the quantity was restricted to “1” and if you sold the same Flat Rate repair more than once, you would need to add it multiple times on the Invoice. With this release, you can now change the quantity to however many you sold. The reason for this restriction had to do with how the system tracked the “Primary Repair”, which could have a different sell price than subsequent repairs, depending on how you have your Flat Rate setup.

If your company charges a different price for the Primary Flat Rate Repair as opposed to subsequent repairs, and you sell the Primary Repair multiple times on an invoice, you may want to add the item twice on your invoice. The first time you add it (if it is the “Primary Repair”), it will charge a higher price. If you sold a quantity of 3 (for example) of the primary repair, it is going to charge the higher price multiplied by 3. If you add the Primary Repair as the first Flat Rate item on an invoice with a quantity of one, and add the same repair a second time with

quantity of 2, the system will charge the higher price for the Primary Repair and the lower price for the additional 2 on the second line.

Capacitor

REF110000

ADD

Charge Unit with R22 (First Pound)

REF110015

Quantity

Edit Price

Choose Location

Equipment

Description

1 2 3 4 5 6 7 8 9 0

- / : ; () \$ & @ "

#+= . , ? ! ' < >

ABC space return

🎤

ServiceFactor Mobile - Primary Flat Rate Flag has been added to SF Mobile

The Flat Rate Primary Flag has been added to the Item Detail screen, so that you can change which item is being charged as the Primary Flat Rate item in the field if necessary. By default, the first Flat Rate repair added to an invoice will be considered the “Primary” repair, and will have the “Primary Slider” selected, indicating it is the Primary Repair. Additional Flat Rate repairs added will have “Primary Slider” turned off, which indicates it is not the Primary Repair. If you want to change the primary repair to a different item, select the item you would like to make the Primary Repair and change the “Primary” slider from off to on. This will make the updated item the Primary Repair, change the Primary Slider to off on the original primary repair and adjust the Prices of each repair accordingly.

3:14

Items

Invoice 5 Quote 0

CON110005

Quantity 1.00

Edit Price 489.00

Choose Location Truck 102

Equipment AC 100

Description

Replace 1/4 HP 825 RPM 230V Condenser Fan Motor

Primary

Print

Move to Quote \$114.00 Non Taxable

View Invoice

3:23

Items

Invoice 5 Quote 0

RUN110000

Quantity 1.00

Edit Price 114.00

Choose Location Truck 102

Equipment AC 100

Description

Replace 3 to 10 MFD 370V Oval Run Capacitor

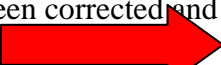
Primary

Print

Move to Quote \$114.00 Non Taxable

View Invoice

ServiceFactor Mobile – Issue displaying history has been fixed

There was an issue in SF Mobile that would cause you not to be able to view the “Read More” if certain characters were used in the description. This issue has been corrected and the “Read More” link will display the full description if it is clicked. 

ServiceFactor Mobile – Issue with Non-Billable Items showing up as Billable

If you had a customer that had multiple Service Agreements and you had a Service Agreement Work Order with Non-Billable Items and you changed the Service Agreement associated with the Work Order, the system would change the Non-Billable Item to billable. This has been changed so that the item will stay non-billable unless you manually change it to billable.

ServiceFactor Mobile – Selling a Second Service Agreement to an existing Service Agreement customer would give a double discount

If you had a customer with a service agreement that offers a discount, and you sold them a second service agreement that offers a discount, the system was giving both discounts. This has been corrected so that it will only give a discount based on the original Service Agreement to which the Work Order was assigned.

ServiceFactor Mobile – Task Forms would sometimes display the Sliders in the “On” position, even though they were defaulted to Off

This issue has been fixed and the sliders will start off with the value that has been assigned in the default settings when you first access the form. Once you make changes and save the form, the changes to the sliders will be maintained.

ServiceFactor Mobile – The “You Saved” and “You Could Have Saved” text wasn’t always printing on the invoice.

There was an issue with the “Savings Text” not printing on invoices if you added a Service Agreement after you already added items to a work order that did not have a Service Agreement to begin with. This has been corrected and the system will now print the savings text if you sell a service agreement after the items have been added to a Work Order.

ServiceFactor Mobile – If you were viewing Equipment in the “Supervisor” mode, the Warranty dates were not displaying

Labor and Parts Warranty Dates will now be displayed if you are in the Supervisor Mode in SF Mobile.