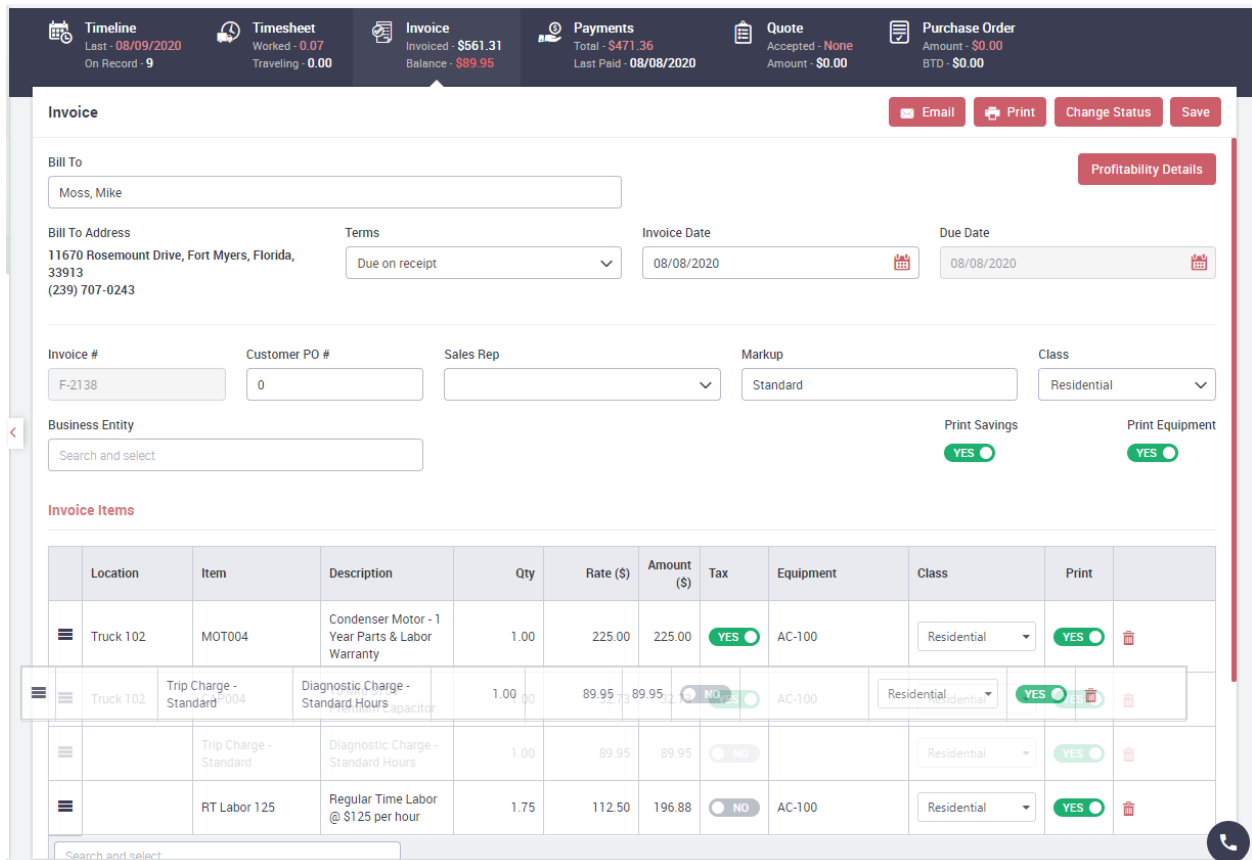# SF Release Notes: August 10, 2020

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.

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.

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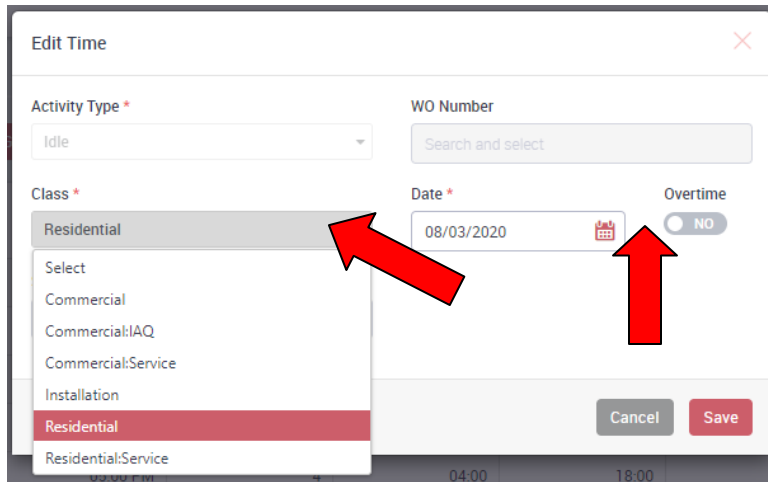
Helpful Tip: If you want to manually change one line of data from Regular Time to OT or vice versa, you can click the "Overtime" slider in the Time Entries Screen to turn OT On or Off.

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.

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.

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.

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 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 a brief desciption 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 finised 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

Report Lisitng 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

Report	Description
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 subtotaled, 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

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

Sunday, August 9, 2020 — Missed Inspection Report — 1/1

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.

Technician Unavailable Time Report

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.

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

The Flat Rate Primary Flag has been aded 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.
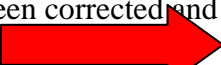
ServiceFactor Mobile – Issue displaying history has been fixed

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 manaully 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 correceted 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.