

SF Release Notes: October 5, 2020

Upcoming Service Reminder – You can now define what time you want the “Day Before Work Reminder” to be sent to the customer

You can now define what time you want the “Day Before Work Reminder” to be sent to your customers on the day before the scheduled work date. Prior to this release, the system would automatically send the Work Reminder at 8:00 PM the night before. With this new feature, you can define the time that you want the reminders sent. This will allow the reminder to be sent during business hours in case the customer needs to reschedule.

You can now define if you want to manually send the “Day Before Work Reminders”, as opposed to having the system send them automatically the prior day.

You may prefer to manually send the Upcoming Service Reminders as opposed to having the system send them automatically the prior day. To set up either of these new Work Reminder features, go to the Day Before Work Reminder Communication Template and select the appropriate features. **NOTE** – Even if you choose to automatically send the reminders, you can send an additional reminder manually at any time.

Helpful Tip – Be sure to fill in the “Exclude Customer Type” field if you do not want reminders automatically sent to specific customer types, such as Commercial customers for example.

NOTE – Even if you elect to exclude a specific customer type, you can still manually send them a Service Work Reminder.

The screenshot shows the 'Company - Communication Templates' configuration page. The 'Basic Details' section includes the following fields:

- Template:** A dropdown menu set to 'Day Before Work Reminder'.
- Exclude Customer Type:** A text input field containing 'Commercial' with a blue 'x' icon to the right. This field is highlighted with a red box.
- No of days before the reminder should be sent:** An empty text input field.
- No of days after the reminder should be sent:** An empty text input field.
- Only allow manual sending:** A checkbox that is currently unchecked. This field is highlighted with a red box.
- Send At (Approximate):** A time selection field set to '01:00 PM' with a clock icon to the right. This field is highlighted with a red box.

A blue 'Save' button is located in the top right corner of the page.

Work Reminder Notifications – The Dispatch Card will now indicate if the “Upcoming Work Reminder” has been sent to the customer.

If a Work Reminder has been sent to the customer, a check mark inside of a circle will appear in front of the data on the bottom line of the Dispatch Card. A green check mark indicates the reminder was sent automatically the day prior, whereas a blue check mark indicates the reminder was manually sent.

Helpful Tip – The date and time the reminder was sent will be recorded in the Work Order Timeline screen so that you can see when the reminder was sent.



Use Tax – You can now track Use Tax associated with a Regular Invoice

Prior to this release, you could only track Use Tax if it was associated with a Project Management job. With this release, we have added the ability to track Use Tax on a Regular Invoice as well. A new “Use Tax” Slider has been added to the Work Order Invoice screen. If you set the slider to “Yes”, you will be able to select the appropriate Use Tax region and run the new Service Use Tax Report that will show the Total Taxable Amount (material costs) and the Tax value based on the Taxable Amount. The Service Use Tax Report can be found in the Reports Menu Option under the Work Order Reports section.



A screenshot of the 'Invoice' screen in a software application. The screen displays various fields for invoice information. At the top right, there are buttons for 'Email', 'Print', and 'Save'. Below these, there is a 'Bill To' field with the name 'Alco, Jonathan' and a 'Profitability Details' button. The 'Bill To Address' is '2318 Tamarisk Ln, Plano, Texas, 75023'. The 'Terms' are 'Due on receipt', 'Invoice Date' is '09/17/2020', and 'Due Date' is '09/17/2020'. Below this, there are fields for 'Invoice #' (F-2325), 'Customer PO #', 'Sales Rep', 'Markup' (Standard - 110), and 'Class' (Residential). At the bottom, there is a 'Business Entity' field (Res HVAC Service) and two 'Use Tax' fields. The first 'Use Tax' field has a green 'YES' button with a green circle next to it, and the second 'Use Tax' field has a text input 'Dallas'. To the right of these are 'Print Savings' and 'Print Equipment' buttons, both with green 'YES' buttons and green circles next to them. A red box highlights the two 'Use Tax' fields.

Quotes – The Work Order created from an Accepted Quote will now appear in the Quote Screen

You can now easily see the Work Order number created from an Accepted Quote right in the Quote itself. Prior to this release, you would have to go to the Work Order listing for the specific customer and search for the Work Order number in the grid. Now the Work Order number will appear on the left hand side of the screen and you can access the Work Order by simply clicking on the number.

Equipment File – Forms returned from ServiceFactor Mobile will not display the Work Order Number from which it was generated as well as the Date.

The Equipment Screen has been modified to show more information about the Form that was returned from SF Mobile. It will now include the Work Order number and the Date that it was created. Clicking the view link in the last column will allow you to view the form.

	Description	W.O.#	Date	
	Equipment_239241_Customer_Form	WO-2080	09/18/2020	

Customer History – Now Listed in Reverse Order

The Customer History has been changed to list the Work Orders in Reverse Order (newest to oldest). Prior to this release, the History was listed from Lowest to Highest Work Order. This will allow you to see the most recent history first. **NOTE** – This has been implemented in both the office and ServiceFactor Mobile and is for both ServiceFactor History as well as Imported History.

Customer History SF History Search For WO #, Invoice #

WO-2780	10/01/2020	
A-2395	\$ 3,808.00	>
WO-2607	09/01/2020	>
A-2250	\$ 3,808.00	>
WO-2450	08/01/2020	>
A-2109	\$ 3,808.00	>
WO-2376	07/15/2020	>
	\$ 0.00	>
WO-2313	07/01/2020	>
A-1991	\$ 3,808.00	>
WO-2247	06/17/2020	>
F-1935	\$ 361.84	>

WO-2780 - Posted

Call Date	PO #	Invoice #	Invoice Date	Amount
09/30/2020	JB-2020	A-2395	10/01/2020	\$ 3,808.00

Problem Reported
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Site Address
Brown, Josh
2701 W 15th Street #147 Plano, Texas, 75075
(214) 555-1414

Promised Time
--

Sales Rep
--

Scheduled Tech
Scheduled Date

Equipment

Equip. ID	Equip. Type	Brand	Model	Serial	Location
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History SF History

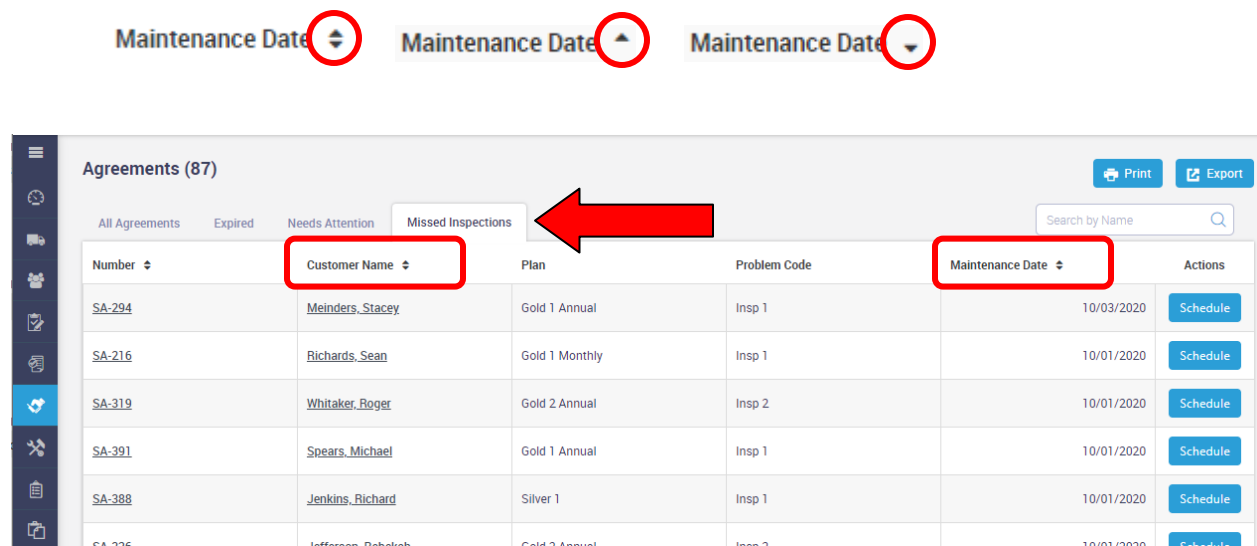
Brown, Josh
2701 W 15th Street, #147, Plano, Texas, 75075

WO-2780	Posted
Problem Code	Invoice Date
Invoice {} Hrs	09/30/2020
Lead Tech	Invoice #
-	A-2395
WO-2607	Posted
Problem Code	Invoice Date
Invoice {} Hrs	08/31/2020
Lead Tech	Invoice #
-	A-2250
WO-2450	Posted
Problem Code	Invoice Date
Invoice {} Hrs	07/31/2020
Lead Tech	Invoice #
-	A-2109
WO-2376	Assigned
Problem Code	Invoice Date
Res - No Cool (02:00) Hrs	-
Lead Tech	Invoice #
Nate	-
WO-2313	Posted

Service Agreements Missed Inspections Tab – New sort options have been added

Two new sort options have been added to the Missed Inspection Tab in the Service Agreements menu option. The new sort options are by the Customer Name and Maintenance Date. Prior to this release, you could only sort by the Agreement Number.

Helpful Tip – To sort by a column, click the header of any column with an arrow next to the header. Clicking the header again will reverse the order of the sort option. **NOTE** - If you have not clicked a header, you will see both an up or down arrow next to any column header for which you can sort. When you click the header, the arrow for that column will change to an up or down arrow, depending on which direction the column has been sorted.

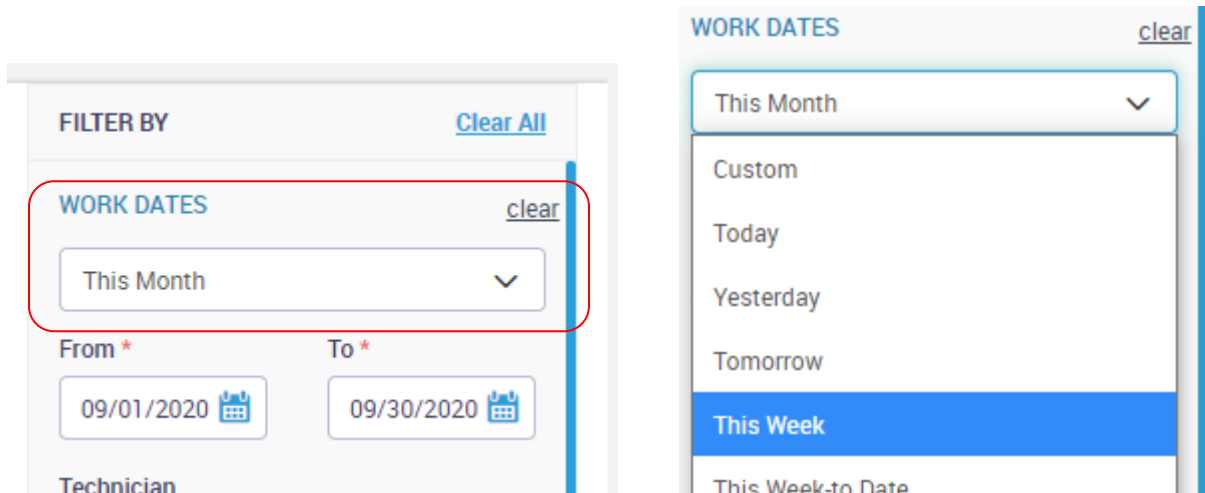


The screenshot shows the 'Missed Inspections' tab in the Service Agreements interface. The 'Customer Name' and 'Maintenance Date' headers are highlighted with red boxes. A red arrow points to the 'Missed Inspections' tab. Above the table, three 'Maintenance Date' headers are shown with red circles around their sort arrows, indicating the new sorting options.

Number	Customer Name	Plan	Problem Code	Maintenance Date	Actions
SA-294	Meinders, Stacey	Gold 1 Annual	Insp 1	10/03/2020	Schedule
SA-216	Richards, Sean	Gold 1 Monthly	Insp 1	10/01/2020	Schedule
SA-319	Whitaker, Roger	Gold 2 Annual	Insp 2	10/01/2020	Schedule
SA-391	Spears, Michael	Gold 1 Annual	Insp 1	10/01/2020	Schedule
SA-388	Jenkins, Richard	Silver 1	Insp 1	10/01/2020	Schedule
SA-326	Jefferson, Deborah	Gold 2 Annual	Insp 2	10/01/2020	Schedule

Reports – New Date Selection dropdown has been added to the Filter

We have updated the Reports Interface to make it faster and easier to pick common dates. Above any date field, we have now added a drop down that will allow you to instantly pick common dates, such as Custom, Today, Yesterday, Tomorrow, This Week, This Week-to-Date, Next Week, Last Month, This Month, This Month-to-Date, Next Month, This Quarter, This Quarter-to-Date, This Year, This Year-to-Date and Last Year. Prior to this release, you would have to click in the date field and pick the appropriate date from the calendar. This makes it much faster and easier to pick common date ranges. **NOTE** – You can still manually pick dates if you want to use dates other than the common dates.



Reports – Several new reports have been added to the system.

Technician Profitability Summary Report

The Technician Profitability Summary Report prints the Cost, Sell and Profit information for Work Orders chosen by either Work Date or Invoice Date. The cost and sell information will be broken out by Material, Labor and Other as well as a Total along with the Profit Dollars and Profit %. If multiple technicians worked on a single work order, you can choose to give all of the sales and costs to the lead technician, or prorate the sales, costs and profits based on either the amount of time worked by each tech on the work order or by the hourly cost per technician. By selecting the hourly cost, you should get a more accurate profitability per technician, as you will be recognizing the cost difference between higher and lower paid technicians.

The summary report will combine all Work Orders into one line and give you one total for each time type (Material, labor, Other) as well as one total for the profitability.

Technician Profitability Detail Report

The Detailed Technician Profitability Report prints the Cost, Sell and Profit information for Work Orders chosen by either Work Date or Invoice Date. The cost and sell information will be broken out by Material, Labor and Other as well as a Total along with the Profit Dollars and Profit % for each Work Order listed. If multiple technicians worked on a single work order, you can choose to give all of the sales and costs to the lead technician, or prorate the sales, costs and profits based on either the amount of time worked by each tech on the work order or by the hourly cost per technician. By selecting

the hourly cost, you should get a more accurate profitability per technician, as you will be recognizing the cost difference between higher and lower paid technicians. If a Work Order has multiple technicians and/or work dates, a * will appear next to the Technician's name, indicating that the work order has been split between multiple technicians, and/or dates.

Technician KPI (Key Performance Indicators) Report

The Technician KPI Report provides some important Key Performance Indicators to determine how a technician is performing. The KPI report includes information for a specific period of time, such as the number of open visits, estimated time of open visits, number of closed visits, estimated time of closed visits, actual time of closed visits and the variance of estimated vs. actual time of the visits. In addition, it also includes the billable amounts of non-finalized and finalized calls, the total billable amount with and without tax, the amount collected in the field, total dispatch time and the average revenue per worked hour for total time, as well as broken out between Service and Inspection work orders.

This report also includes the breakout of Travel Time, Work Time and Idle Time along with the percentage of each category, which can be used to determine how much time is actually spent working vs. traveling or idle.

Sales Tax Report

The Sales Tax report lists the Taxable, Non Taxable and Sales Tax total for each tax region based on the invoice date for the selected month. This report is based only on invoices added to ServiceFactor, and will not reflect invoices added directly to your Accounting System. If you are using QuickBooks, you should refer to your Sales Tax Report in QuickBooks for your tax liability in case any invoices were added there.

Cash Receipts Sales Tax Report

The Cash Receipts Sales Tax Report computes Sales Tax based on Posted Cash Receipts, using the Sales Tax Region of the invoices paid. This report is based only on payments added to ServiceFactor, and will not reflect payments added directly to your Accounting system. This report is useful if your Sales Tax is computed only on cash collected, rather than amounts invoiced. If you are using QuickBooks, you should refer to your Sales Tax Report in QuickBooks for your tax liability, as records added in QuickBooks will not be reflected in this report.

Employee Time Report

The Employee Time Report is generated from the data in the Employee Time Entry file for all employees. This report will display the time type, class, starting and ending times, total time and the breakout between regular time and overtime. Additional options allow you to select a specific time type (traveling, working or idle), as well as the pay type.

Service Use Tax Report

The Service Use Tax Report lists all Posted Invoices that were flagged for Use Tax and invoiced during the selected month and year. The Taxable Amount is based on the Cost of any Items that are defined as a cost type of “Material” that have been added to the Invoice. The report includes the Customer and Site Names, type of Work Order, Invoice Number, Invoice Date, Taxable Amount, Tax Amount and Total.

Use Tax is set on the Invoice Screen of the Work Order by changing the Use Tax Slider to Yes and selecting the proper Use Tax Region.

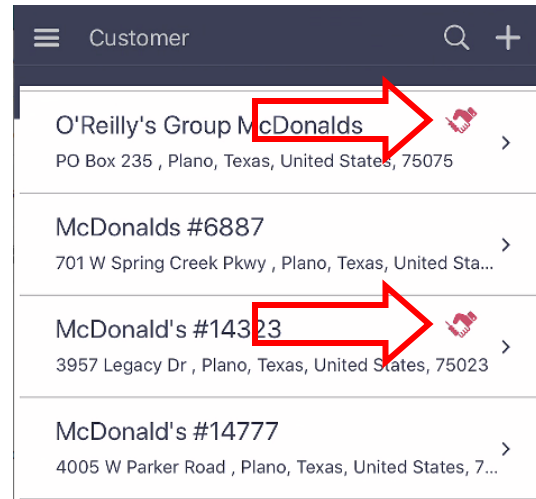
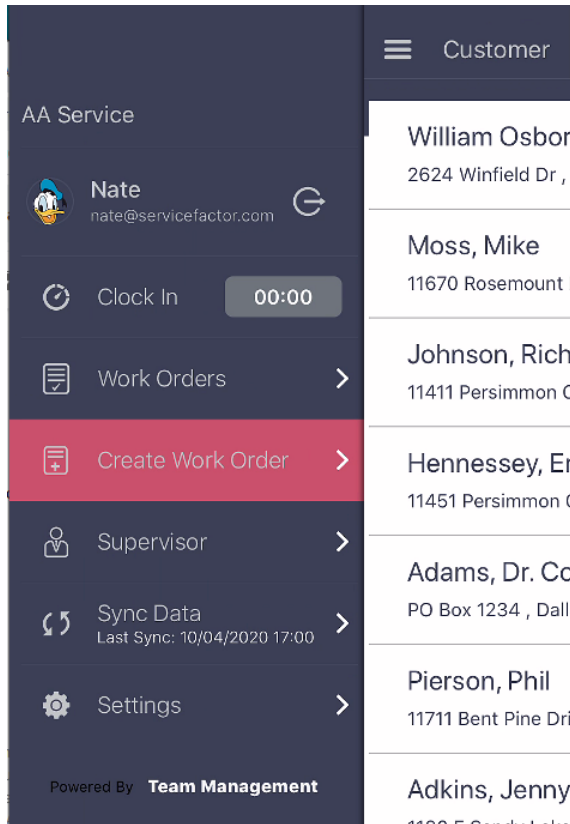
Invoice Pre-Post Report

The Invoice Pre-Post Report produces a list of any invoices that have had the invoice status changed to “Completed” by using the Change Status button on the invoice, or by changing the status in SF Mobile to Completed, but have not yet been posted to accounting.

ServiceFactor Mobile

Adding a Work Order from SF Mobile – Now displays if the customer has a Service Agreement in the Customer Search List

When adding a new Work Order from SF Mobile, the customer listing will now display the Service Agreement Icon if the customer has an active Service Agreement. The Service Agreement Icon looks like a Hand Shake and will appear



Adding a Work Order – Advanced Service Agreement Information

When adding a Work Order from SF Mobile, the Technicians will now see the Service Agreement Timeline similar to the Service Agreement Timeline you see when adding a Work Order in the office. The Timeline will show the type of Service Agreement, Start Date, End Date and will have colored dots indicating when the Inspection Work Orders should be created. Tapping on one of the Dots will display the planned work order creation date, and if the work order has been created, the Work Order Number. The color coding of the Service Agreement Timeline is as follows...

- Yellow dot - indicates that the inspection is up-coming and a work order has not yet been created.
- Red dot - indicates that the planned inspection date has passed and the inspection work order has not been created.
- Blue dot - indicates that the inspection work order has been created, but has not been completed.
- Black dot - indicates that the inspection work order has been completed.

- Green line between the starting and ending months of the Service Agreement indicates how far along in the service agreement you are.
- Gray line at the end of the green line until the expiration date indicates how much time they have left in their service agreement.

Create Work Order
Sunday

Name
Scott, Mike

Address
5450 Inverness Circle Suite, Fort Myers, Florida, United States, 33903

Phone
(239) 555-0099

Mobile
(239) 555-8301

Email
mike@scott.com

Agreement
SA-124-01-Gold 1 Annual

Apr 2020 Apr 2021

Task

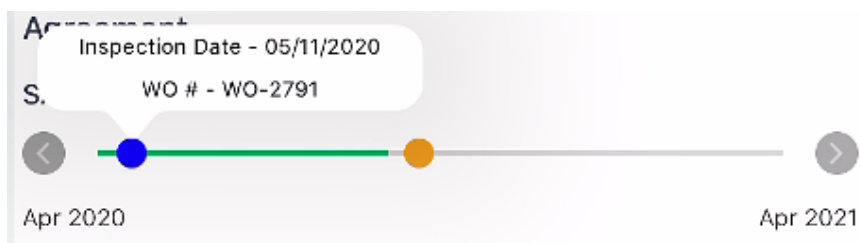
Problem Code *
- Select -

Estimated Time *
01:00

Priority
- Select -

Lead Source *
- Select -

Service Agreement *



Following Issues have been resolved in ServiceFactor Mobile

Quote Total Not Displaying Sales Tax – There was an issue in certain scenarios where the sales tax was not being included in the Quote Total displayed on the screen. This has been corrected.

Bill from Office Work Orders Not Appearing in the “Completed” Tab of Work Order Menu – If the Customer was set as “Bill from Office”, the system was not adding the Work Order to the “Completed” Tab of the Work Orders file when it was returned from SF Mobile. This has been corrected.

Inactive Equipment Was Showing up in the Equipment Listing – SF Mobile will no longer display Equipment that has been marked as “Inactive”.

Invoice Dates in History off by one day – In some scenarios, the Invoice Date would be off by one day. This was due to different time zones and has been corrected.