

# SF Release Notes: December 22, 2020

## Dispatch Board

### Ability to Add Additional “Visits” to Completed Work Orders that have not yet been Posted to Accounting

You can now change the status of a “Completed” Work Order that has not been posted to accounting back to “None” which will allow you to assign the Work Order to additional technicians or times on the Dispatch Board. Prior to this release, once you marked the status of a Work Order “Complete” (not the Dispatch Status, but the Work Order Status), you could no longer assign the Work Order to additional technicians, dates or times on the Dispatch Board. Now, if a technician marks the call complete and you realize that you need to go back out on the call, you can change the status of the Work Order back to “None” and add additional visits to the call from the Dispatch Board.

To change the Work Order Status, go to the Invoice Screen, click the Change Status button and choose the status to “None”. To assign the call to an additional technician, date or time, find the call on the Dispatch Board, click the customer’s name and click the Copy Work Order button. This will place the new visit in the “Holding Area” of the dispatch board, from where you can drag and drop the new visit to the appropriate technician’s time slot.

The screenshot displays the Dispatch Board interface with a modal window open for Work Order Summary: WO-2977. The modal contains the following information:

- Customer:** Smith, Jennifer (SJ), 11645 Stone Loop Court, Fort Myers, Florida, 33913, (239) 456-1458, jen@mail.com. Buttons: WO Details, Copy WO.
- Agreements:** GOLD1A
- Problem Code:** Insp 1
- Scheduled Time:** 11/06/2020 12:06 PM - 01:36 PM
- Call Taken Date/Time:** 11/05/2020 12:01 AM
- Promised Date/Time:** -
- Estimated Time:** 01:30 hrs
- Priority:** -
- Zone:** Gateway
- Technician(s):** CT
- Problem Reported:** -
- Input:** Add Note (with a checkmark button)

The background shows the Dispatch Board with a grid of technicians (A - On Hold, Bobby, Brett, Chuck Tu..., Drew, James) and time slots (8 AM, 9 AM, 3 PM). A map at the bottom shows the location near Whiskey Creek and Page Park.

# Project Management

## AIA Style Job Billing

This release will now allow you to print an additional Project Management (Job) Invoice format that is similar to an AIA Invoice. AIA Billing is a standard method of billing in the construction industry based on a percentage of completion for a Schedule of Values associated with the Job. The new billing format will allow you to track stored material on the Job and print a Payment Application and a Continuation Page with a detailed breakdown of the schedule of values, including the amounts from previous periods, the current period and the amount of material currently stored.

**NOTE** - AIA Billing was developed by the American Institute of Architects in the early 1990s and typically consists of 2 forms, the G-702, Contractors Application for Payment and the G-703, Continuation Sheet. All AIA Forms are copyrighted by the American Institute of Architects, and therefore prohibit software providers from an exact duplication of the forms. However, ServiceFactor provides all of the data in a similar format that is different enough to avoid copyright violation and is not considered an “official” AIA Document. If your contractor requires an Official AIA document, the figures from the ServiceFactor Invoice can be used to fill in your official AIA documents. All AIA related documents, including G-702 and G-703 mentioned herein are trademarks of the American Institute of Architects and Team Management Systems makes no claims of any kind to these works.

When setting up your Schedule of Values, you can choose if you want the invoice to be a Regular Invoice, an AIA Standard type of Invoice or an AIA CMA Type invoice. If you choose an AIA type invoice, you will have an additional column on the Job Cost Invoice to enter the dollar value of “Stored Material” if applicable.

Source	Description	Total Value	% Complete	\$ Complete	\$ Retainage	\$ Stored	Taxable	Class
Phase	Project Management / Plans	8850.00	75.00000	6637.50	663.75	0.00	<input type="radio"/> NO	Commercial
Phase	Underground, Drainage, etc.	67860.00	100.00000	67860.00	6786.00	0.00	<input type="radio"/> NO	Commercial
Phase	Above Floor Sewer and Vent	4747.00	100.00000	4747.00	474.70	0.00	<input type="radio"/> NO	Commercial
Phase	Water Piping	13841.00	75.00000	10380.75	1038.08	1500.00	<input type="radio"/> NO	Commercial
Phase	Fixtures and Equipment	20611.00	0.00000	0.00	0.00	0.00	<input type="radio"/> NO	Commercial
Phase	Compressed Air	20090.00	75.00000	15067.50	1506.75	0.00	<input type="radio"/> NO	Commercial
Phase	Boiler System	172536.00	75.00000	129402.00	12940.20	3500.00	<input type="radio"/> NO	Commercial
Phase	Insulation	5700.00	0.00000	0.00	0.00	0.00	<input type="radio"/> NO	Commercial
Change	Water Softener System	36445.00	75.00000	27333.75	2733.38	5000.00	<input type="radio"/> NO	Installation
Change	Urinal Upgrade	5410.00	75.00000	4057.50	405.75	1100.00	<input type="radio"/> NO	Installation

## Ability to Add Negative Change Orders to Project Management Jobs

This release will now allow you to add a negative change order to a Project Management Job. Negative change orders can be used for adjustments to the original contract that will lower the sell price of the original contract. Prior to this release, you would need to make an adjustment to the billing screen and adjust your schedule of values to reflect the change in price. This will allow you to better track the reason for the change of value, and will also allow you to print the change on Job Invoices.

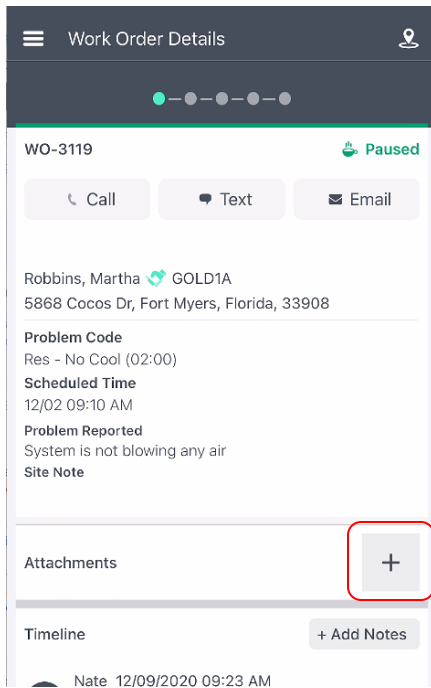
### Change Order Values

Item	Description	Total Value	% Complete	\$ Complete
As Agreed	CO to relocate Return Air in Office	5000.00	100.00	5000.00
Change Order	Use existing line set	-450.00	0.00	0.00

## ServiceFactor Mobile

### Ability to add Work Order Attachments

You can now add “Attachments” directly to the Work Order from ServiceFactor Mobile. Attachments are added by tapping the “+” icon in the Attachments Section of ServiceFactor Mobile. This will add the attachment back to the



## Reports

### Project Management Over/Under Bonding Report

A new “Ending Date” option has been added to the Selection Filter. If you enter an “Ending Date”, the report will only include costs that have been incurred through the ending date. Costs will come from Work Orders that have been posted through the date selected, Direct Charges with dates through the date selected, labor that has been entered through the date selected and any items from Purchase Orders that have been received through the date selected.

Job #	Job Name	Sell Price	Estimated Cost	Estimated Profit %	JTD Cost	Percent Complete	Amount Earned	JTD Billed	Over/Under Billed	Percent Billed
20-32	Jen Smith New System	1,500.00	0.00	100.00%	0.00	0.00%	0.00	0.00	0.00	0.00%
20-36	New System	1,000.00	875.00	12.50%	0.68	0.08%	0.78	0.00	0.78	0.00%
20-47	New System	15,000.00	4,487.00	70.09%	3.58	0.08%	11.97	4,500.00	(4,488.03)	30.00%
20-48	New Home	15,000.00	10,750.00	28.33%	2,756.40	25.64%	3,846.14	0.00	3,846.14	0.00%
20-49	Smith Replacement	10,600.00	5,000.00	52.83%	3,604.08	72.08%	7,640.66	10,600.00	(2,959.34)	100.00%
20-51	New House	25,000.00	0.00	100.00%	2,293.30	0.00%	0.00	17,500.00	(17,500.00)	70.00%
Report Totals		68,100.00	21,112.00	69.00%	8,660.04		11,499.54	32,600.00	(21,100.46)	47.87%

### Contract Required Materials by Customer Report

A new report has been added that will show you the material required for a particular month by customer. This report is very similar to the Contract Required Materials Report, but instead of listing the each customer for each item, it will list the items required for each customer. The items on this report are based on the materials listed in the “Maintenance Schedule” screen of the Service Agreement. This report will list the Item Name and Description, Quantity required and the piece of equipment for which it is required, if applicable, for each customer for the month selected. This report can be found under the “Contract Reports” section on the Reports Menu.

### Committed Inventory Report

A new Committed Inventory Report has been added to the system that will list any Inventory Items that have a Committed or Received Committed value. Committed values are based on Inventory Items that have been added to an Invoice, but have not yet been posted to accounting, while Received Committed values are based on Inventory Items that have been received against a Purchase Order but have not yet had a Vendor Bill entered for the items in ServiceFactor. This report can be run as a Summary or with Detail. The summary version will list the Item along with the Total Quantity on Hand, Committed Quantity and the Received Committed Quantity with all locations combined. The Detail version will include the Total Quantity on Hand, Committed Quantity and the Received Committed Quantity for each individual location. If you elect to show the breakdown, the report will list each Work Order or Purchase Order on which or from which the item is committed. This report can be found under the “Inventory Reports” menu option.

## **Equipment Mailing Labels Report**

The Equipment Mailing Labels Report prints standard mailing labels, based on your Equipment File. The various selection options allow you to create labels for equipment that has reached a certain age, or equipment with warranty coverage that is due to expire soon, or has expired, etc. You can also print labels for all of the equipment with a certain model number, to assist you with add-on sales or product recalls. This report can be run for customers with or without Service Agreements, for Active or Inactive Equipment, for a specific Customer Type and more. The data from this report can be used for various marketing activities based on new system sales, expiring warranties, specific equipment types, and more. The Equipment Labels have been calibrated to print on Avery 5160 labels (1" x 2-5/8", 3-across).