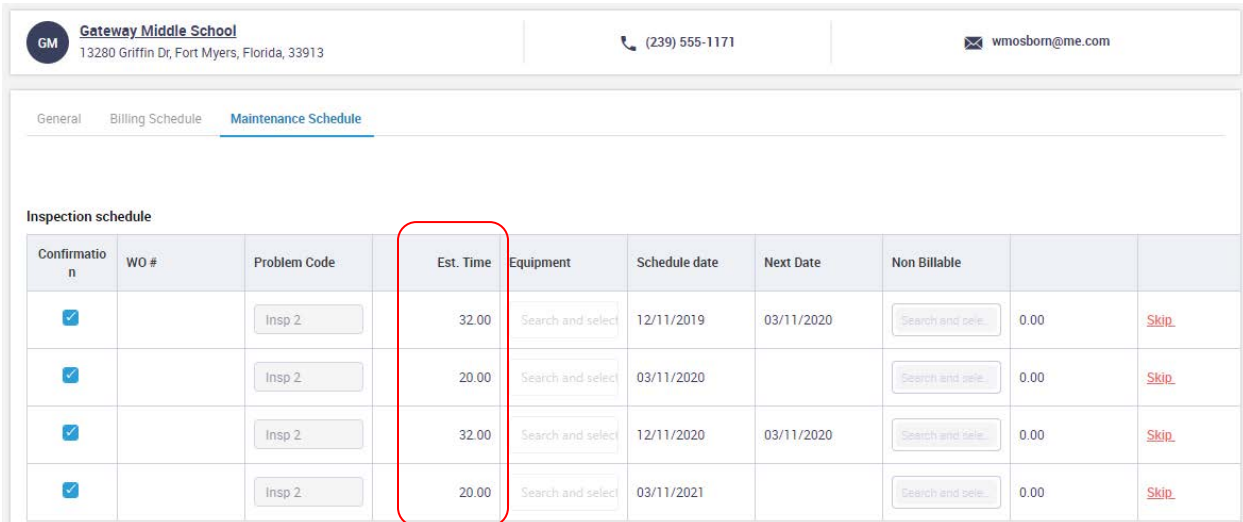# SF Release Notes: January 25, 2020

Service Agreements

A new Estimated Time field has been added to each inspection.

You can now enter the Estimated Time you have allotted for each individual inspection for a Service Agreement. This field will allow you to track the actual time spent on each inspection, as well as the overall Service Agreement, vs. the Estimated Time you have allotted for each inspection. This time is different than the hours associated with the Problem and the time will appear on the Work Order Summary screen in the Dispatch Board. This will help the dispatcher to schedule the proper amount of time and number of techs needed to perform each inspection.

The Estimated time will be used on various Service Agreement Reports, including the Service Agreement Hours Comparison Report, the Inspection Required Hours Report and the Total Monthly Inspections Report. It will also appear in the Agreements Tab of the Customer Detail Center and the Missed Inspection screen.

NOTE – You will be able to go back to prior inspections that have already been created and update the Estimated Time in the Maintenance Schedule screen as long as the Service Agreement is still active. The estimated times you enter in the Maintenance Schedule screen will be automatically carried over to the new Service Agreement if it is set to automatically renew.

Agreements

Gold 2 Monthly - SA-201
12/08/2020 - 12/07/2021

Inspection Schedule

Confirmation	Inspection Date	Problem code	WO #	Prob Code Time	Est. Time	Status	Schedule
✓	12/11/2019	Insp 2	WO-3367	02:00	32.00	Assigned	Manual
✓	03/11/2020	Insp 2		02:00	20.00	Pending	Schedule
✓	12/11/2020	Insp 2		02:00	32.00	Pending	Schedule
✓	03/11/2021	Insp 2		02:00	20.00	Pending	Schedule

Agreements (162)

All Agreements | Expired | Needs Attention | **Missed Inspections**

Search by Name

Number	Customer Name	Info	Plan	Problem Code	Est. Time	Maintenance Date	Actions
SA-242-01	Alco, Jonathan	ⓘ	Gold 1 Annual	Insp 1	1.75	01/15/2021	Schedule
SA-366	Jackson, Jimmy	ⓘ	Gold 1 Annual	Insp 1	2.00	10/01/2020	Schedule
SA-201	Gateway Middle School	ⓘ	Gold 2 Monthly	Insp 2	32.00	12/11/2020	Schedule
SA-201	Gateway Middle School	ⓘ	Gold 2 Monthly	Insp 2	20.00	03/11/2020	Schedule
SA-353	Cunningham, Randy	ⓘ	Gold 1 Annual	Insp 1	1.50	10/09/2020	Schedule

Service Agreement Listing screens now have an option to instantly view the "Contact" information associated with the Service Agreement

A new "Info" icon has been added to all of the Service Agreement listing screens. Clicking the Info Button will instantly show you the Contact Information for the particular customer.

Agreements (436)

All Agreements | Expired | Needs Attention | Missed Inspections

Search by Name

Number	Customer Name	Info	Plan	Start Date	Expiry Date	Renewal Date	Status	Actions
SA-102	Bass, Denise	ⓘ	Gold 2 Annual	12/03/2018	12/02/2019		Inactive	👁 View
SA-103	Roberts, Carl	ⓘ	Gold 1 Annual	03/01/2019	02/29/2020		Inactive	👁 View
SA-105	Meinders, Stacey	ⓘ	Gold 1 Annual	03/15/2019	03/14/2020		Inactive	👁 View
SA-156	Roberts, Scott	ⓘ	Gold 1 Monthly	10/15/2018	10/14/2019		Inactive	👁 View
SA-211	Costello, Mr. & Mrs. Dennis	ⓘ	Silver 1	12/20/2018	12/19/2019		Inactive	👁 View
SA-130-01	Gomez, Hector	ⓘ	Gold 2 Annual	06/14/2019	06/13/2020		Inactive	👁 View

| Contact Info				✕
Contact	**Mobile**	**Phone**	**Email**	
Stacey | Primary |	(239) 555-8001			
Johnny (Hubby	(214) 555-4747		hubby@mail.com	
Mary Beth (Daughter)	(214) 555-4747		maryb@email.com	
Stacey	(239) 555-8001		nmtuttle@earthlink.net	
Stacey Work		(214) 555-1414		

Contact Information Icon has been added to the Customer Detail section of Customer and Work Order Detail Centers

A new "Info" icon has been added to all of the Service Agreement listing screens. Clicking the Info Button will instantly show you the Contact Information for the particular customer.

| Contact Info				✕
Contact	**Mobile**	**Phone**	**Email**	
Stacey | Primary |	(239) 555-8001			
Johnny (Hubby	(214) 555-4747		hubby@mail.com	
Mary Beth (Daughter)	(214) 555-4747		maryb@email.com	
Stacey	(239) 555-8001		nmtuttle@earthlink.net	
Stacey Work		(214) 555-1414		
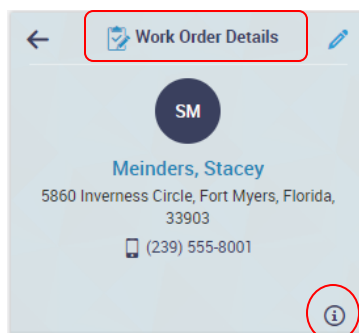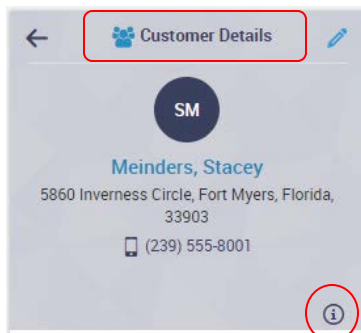
Contact Information Icon has been added to the Work Order Summary Screen from the Dispatch Board
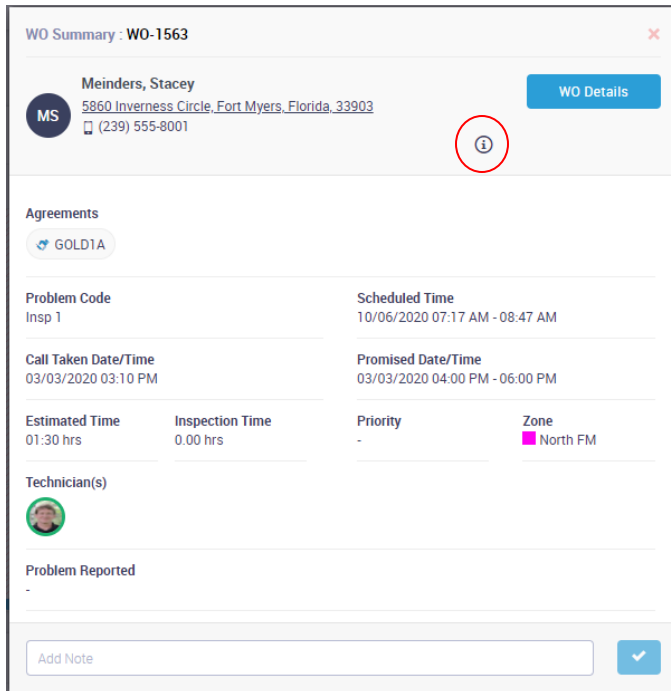
Site Notes have been added to the Work Order Details on the left hand side of the Work Orders Detail Center

The Customer Site Notes will now appear in the left hand side of the Work Order Details center below the Problem Reported. This will allow you to view any important site notes from any of the Work Order screens, including the Invoice screen, without having to drill down into the Customer Record.
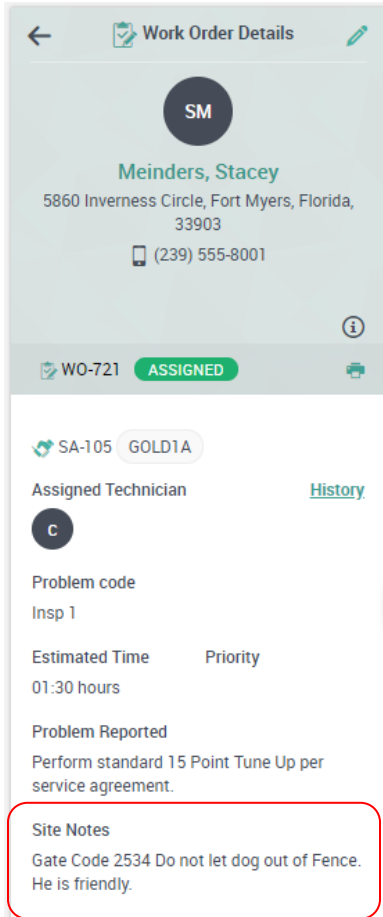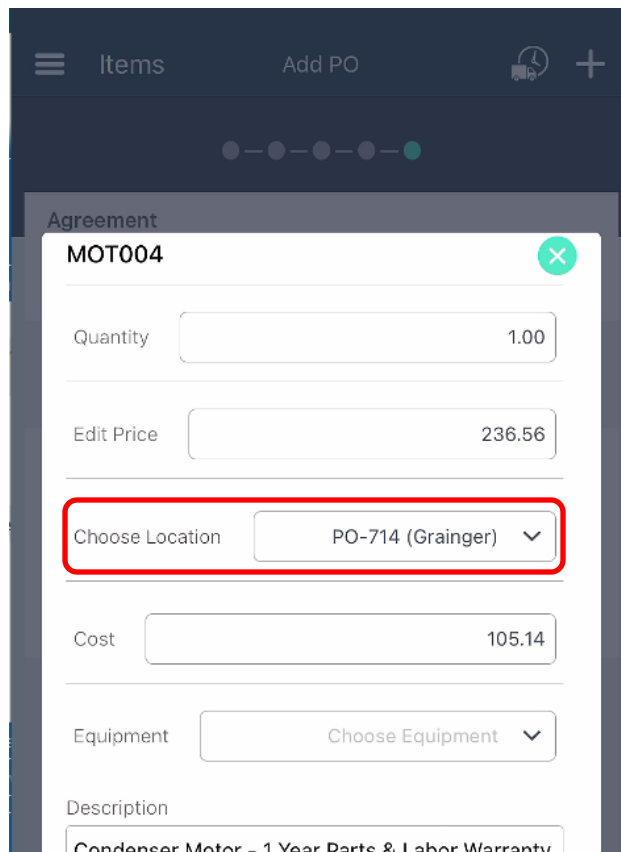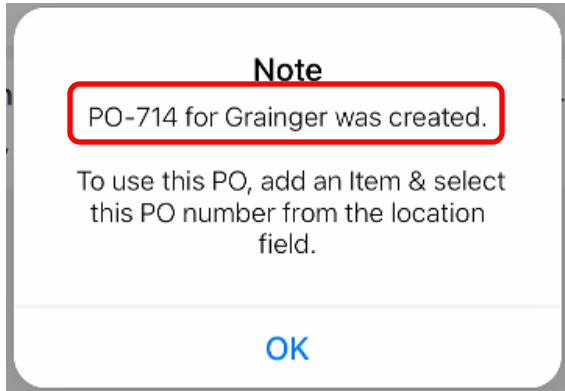
ServiceFactor Mobile

Ability to Add a Purchase Order from ServiceFactor Mobile

ServiceFactor now gives technicians the ability to add a Purchase Order from ServiceFactor Mobile. You can control which Vendors can be issued a PO from SF Mobile, as well as which technicians have permission to add a PO from the field.

Once a PO has been added from SF Mobile, the tech will be able to choose the PO Number as the "Location" from which the items came. This will automatically add the items to the PO in the office, as well as add the items to the customer's invoice.

To add a PO from SF Mobile, click the Add PO button at the top of the Items screen, select the vendor to whom you want to issue the PO, select your item(s) and select the PO Number from the "Choose Location" drop down.

● — ● — ● — ● — ●

Agreement
Choose your agreement   >

Invoice 0   Quote 0

No items available

< 🔍 Select Vendor   🔍

Carrier	(800) 555-1414
PO Box 154, Dallas, 75023	
Grainger	**-**
PO Box 1547, Dallas, 75115	
AC Moore Supply	-
-	
Johnstone Supply	(214) 555-4747
1307 N Watters Rd, Allen, 75013	

Note

PO-714 for Grainger was created.

To use this PO, add an Item & select
this PO number from the location
field.

OK

● — ● — ● — ● — ●

Agreement

MOT004   ✕

Quantity   1.00

Edit Price   236.56

Choose Location   PO-714 (Grainger) ⌄

Cost   105.14

Equipment   Choose Equipment ⌄

Description
Condenser Motor - 1 Year Parts & Labor Warranty

Reports

Vendor Bill Report

This report lists Vendor Bills that have been entered in ServiceFactor, including the invoice number, invoice date, vendor name, PO number, PO amount and vendor bill invoice total. Some of the selection options include vendor name, invoice number, invoice dates, PO number and PO dates.

Service Agreement Hours Comparison Report

The Service Agreement Hours Comparison Report totals the hours worked on Inspection Work Orders and compares them with the Estimated Inspection Hours from the Maintenance Schedule screen for each Service Agreement selected. This report enables you to compare actual to estimated Inspection Hours in order to judge the accuracy of your estimate. In addition to the Estimated Hours and Actual Hours, the report also shows the balance of time you have remaining, whether it is a positive number, or a negative number, which means you exceeded the estimated hours. This report also shows you the total number of inspections, the number of inspections created and the remaining number of inspections that need to be created for each Service Agreement.

Service Agreement Inspection Required Hours Report

The Inspection Required Hours Report will display the number of hours needed to perform inspections for a particular month based on the records selected. This report will show both Problem Code Estimated Hours as well as Inspection Estimated hours from the Maintenance Schedule screen of the Service Agreement. This report is useful for estimating the amount of inspection labor that will be required for a particular month.

Service Agreement Total Monthly Inspections Report

The Total Monthly Inspection report produces a calendar that shows total inspections to be performed in each week of the selected year, including the estimated hours. This report will allow you to specify a specific Contract Type and/or Customer Type if desired. The estimated hours come from the Maintenance Schedule screen of the Service Agreement File and can be based on Estimated Hours or the hours associate with the Problem Code assigned to the Inspection. This report provides an overall look at how many Inspections need to be performed each month, and how much labor will be needed to complete them.

Tech Profit Summary and Detail Reports

Added an option to split the costs and sell prices evenly based on the number of techs that worked on the call in addition to the ability to split the costs based on the amount of time each tech worked, or the hourly cost assigned to each tech.

Employee Time Report

A Posted Column has been added to the report to indicate if the time has been posted to QB Payroll. The posted column was added to both the printed report as well as the export.

Customer List Report

The Markup Table name has been added to the report as well as the export.

Report Date Filters

Added "Last Week" to the Pre-Defined Date selection drop down on all reports that have Dates in the Filter.