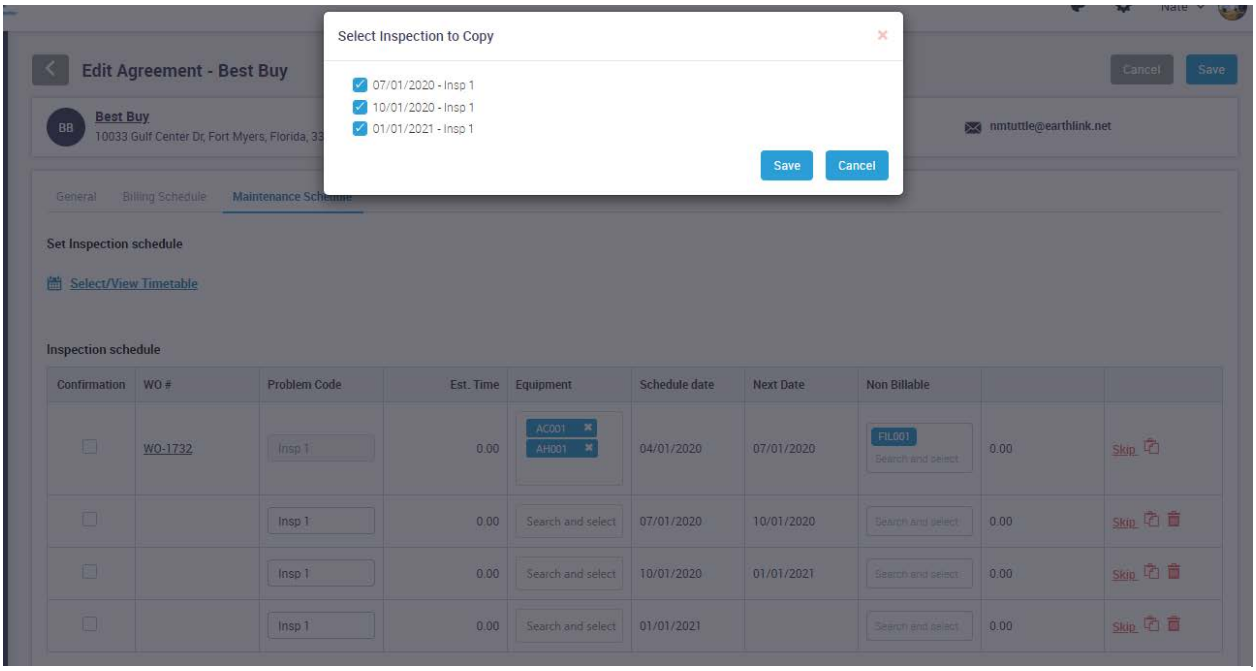
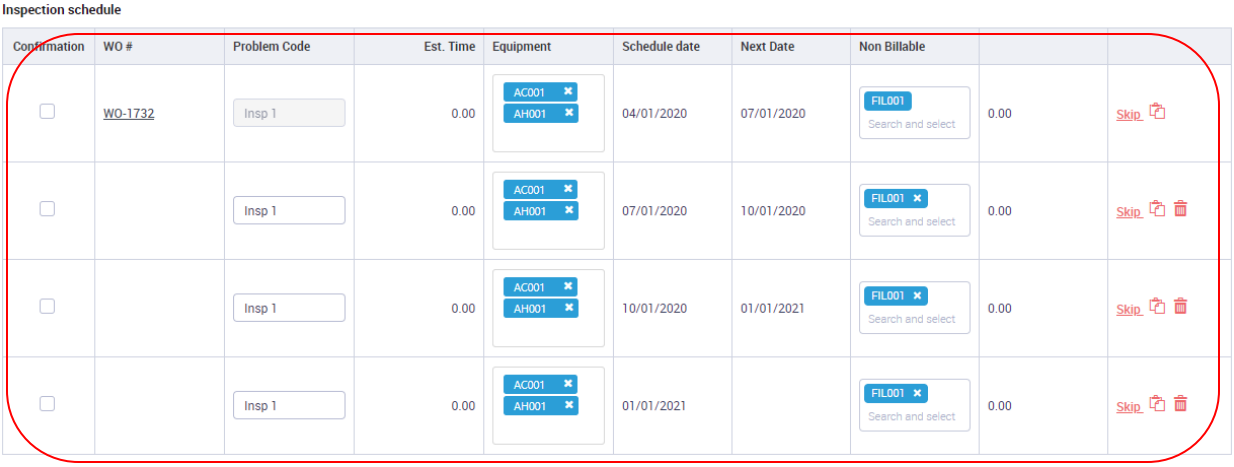
SF Release Notes: March 4, 2021

Service Agreements

A new copy option has been added that will allow you to copy the details from one inspection visit to additional inspection visits

You can now copy the inspection details from one inspection to additional inspections when setting up a service agreement. This feature will save a considerable amount of time when setting up your inspection schedule, especially if you perform the same inspection multiple times for a particular Service Agreement. For example, if you have a commercial Service Agreement where you perform quarterly inspections, you can set up the details of the first inspection and copy it to the remaining inspections. If you have a Service Agreement where you perform a full inspection twice a year and perform filter changes every month, you can copy the full inspection to the additional month and copy the filter change details to the remaining months.

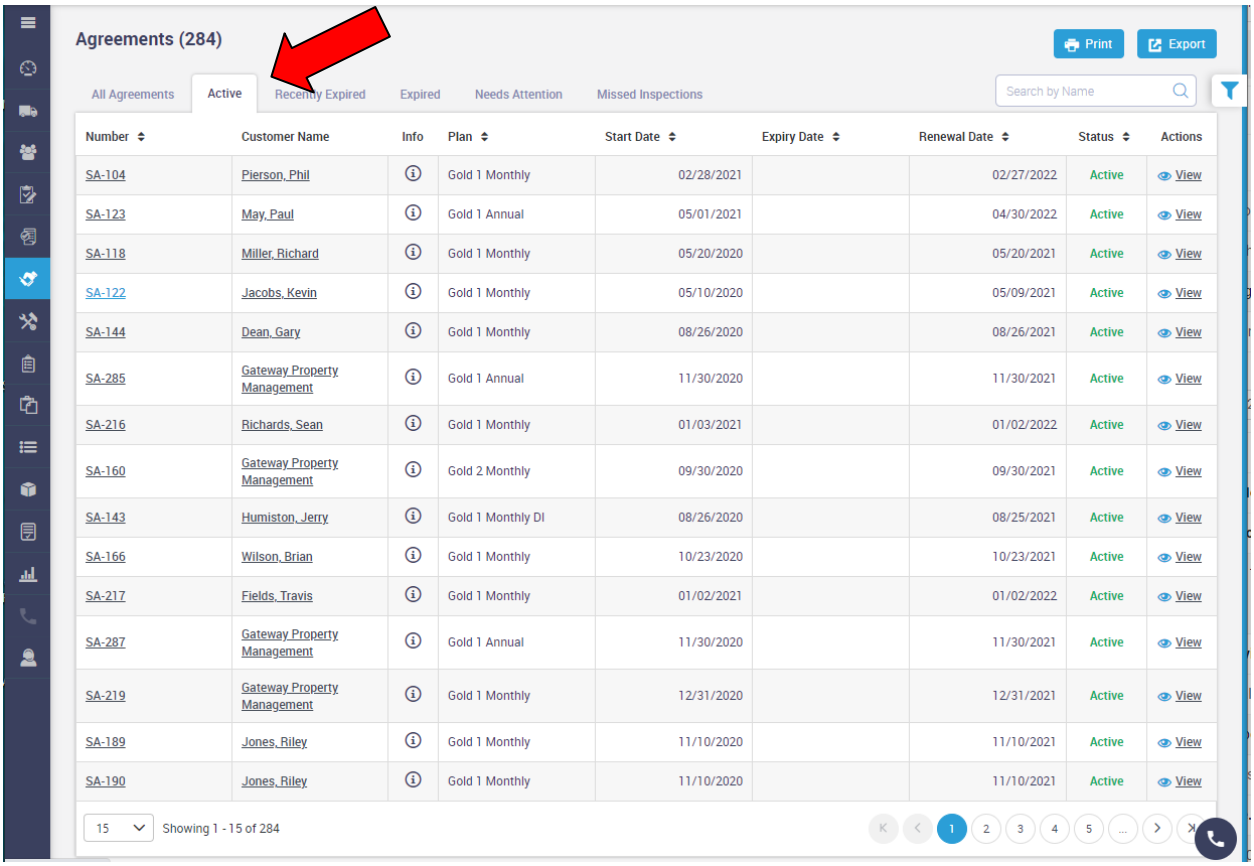




Service Agreement Listing screen has a new "Active" tab

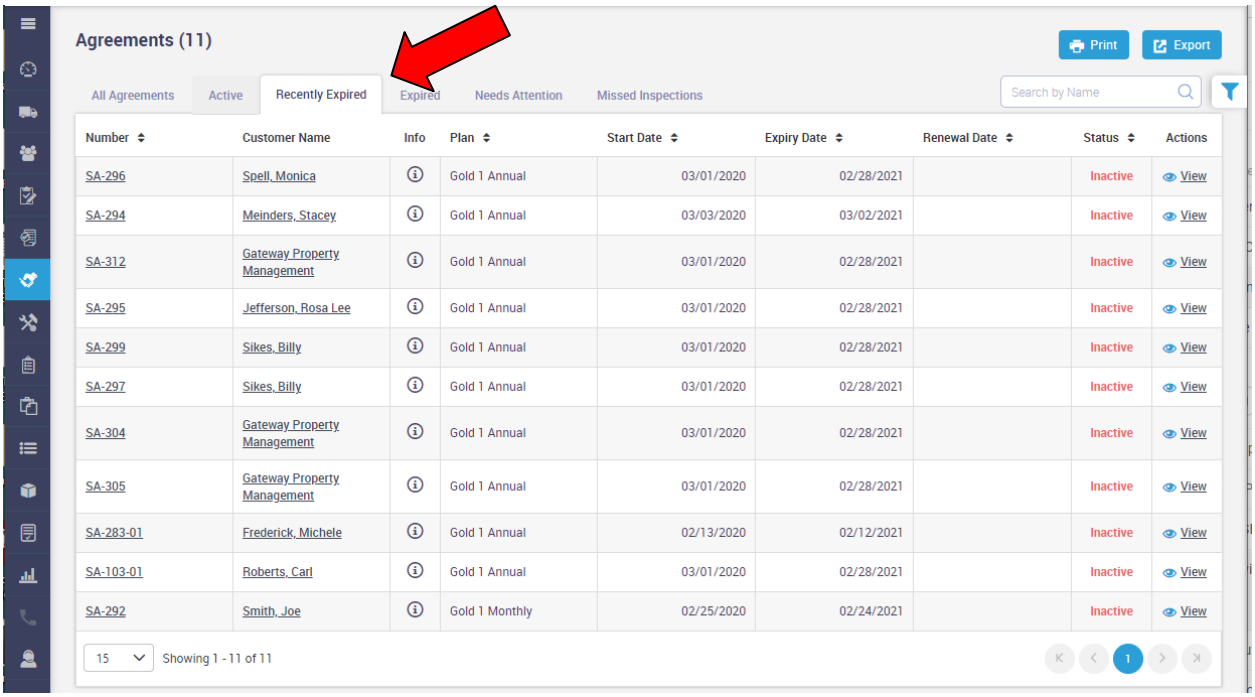
An "Active" tab has been added to the Service Agreement Menu option. This tab will only show active service agreements. Prior to this release, you could use the "Advanced Filter" option to display just the Active Service Agreements.

Helpful Tip - You can use the "Print" or "Export" buttons at the top of the screen to print or Export the list of Service Agreements that are listed. These options are available on all of the Tabs in the Agreements Menu.



Service Agreement Listing screen has a new "Recently Expired" tab

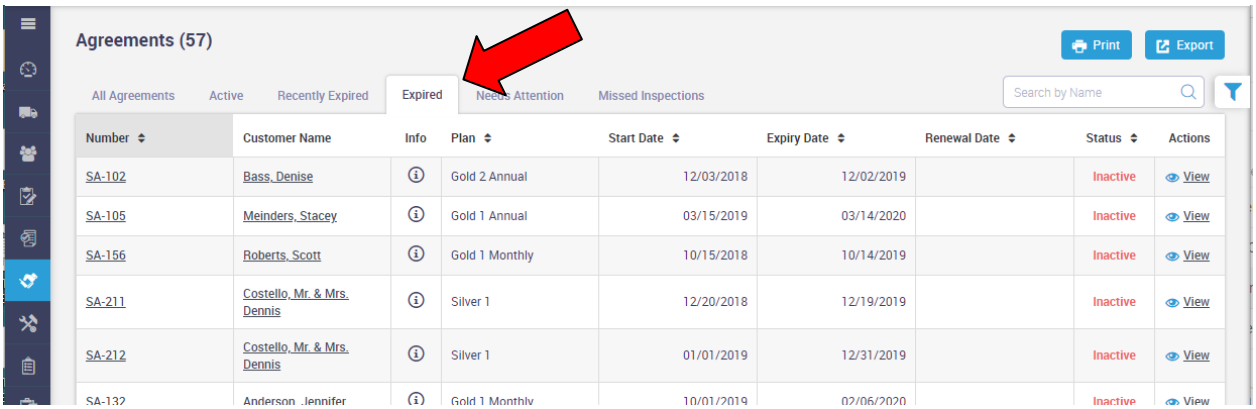
A "Recently Expired" tab has been added to the Service Agreement Menu option. This tab will only show Service Agreements that have expired in the current or prior month and by default, will only show Service Agreements that did not automatically renew. For example, if the date is March 15, this tab will list any Service Agreements that expired from February 1 – March 15 that did not automatically renew. If the date is March 30, the screen will list any Service Agreements that expired from February 1 – March 30 that did not automatically renew. The new option will make it quick and easy to identify which agreements did not get renewed.



Service Agreement Listing screen "Expired" tab, by default, will only show expired Service Agreements that did not automatically renew

By default, the "Expired" tab of the Service Agreement Listing screen will now only display Service Agreements that did not renew. This will give you a more accurate idea of how many service agreements were truly lost, as opposed to showing both expired agreements and agreements that were automatically renewed.

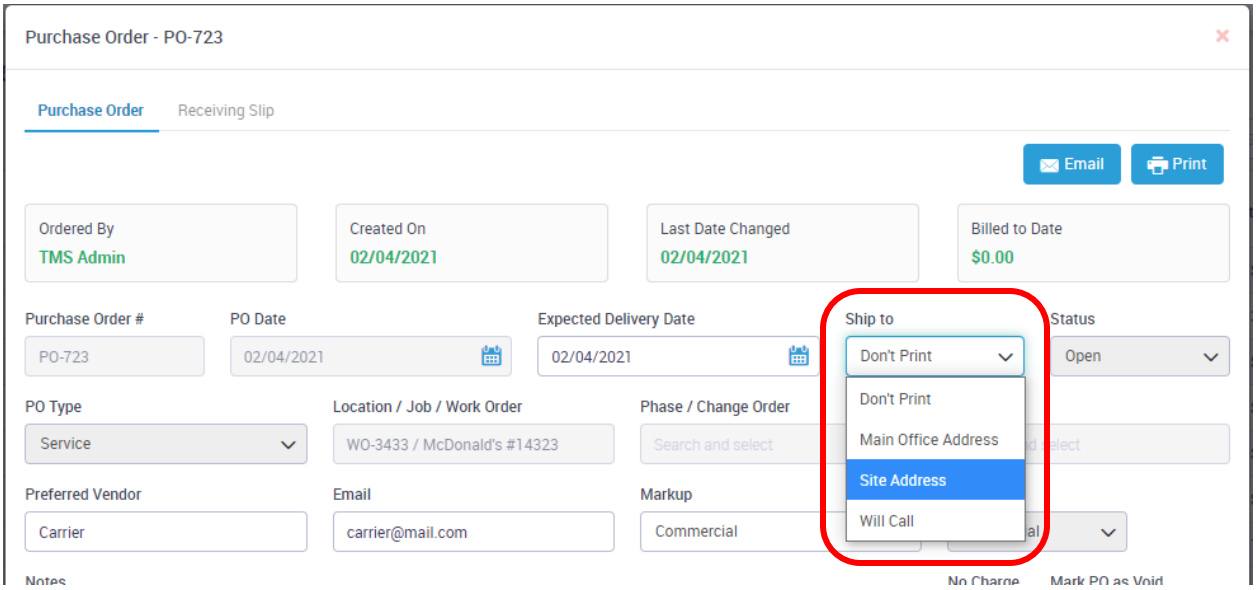
Helpful Tip – If you would like to include the Service Agreements that expired, but also renewed in the list, you can go into the Advanced Filter Option and place a check mark in the "Show Expired Contracts that Renewed" check box and click the "Go" Button. This will include both Service Agreements that expired without renewing and Service Agreements that expired and renewed.

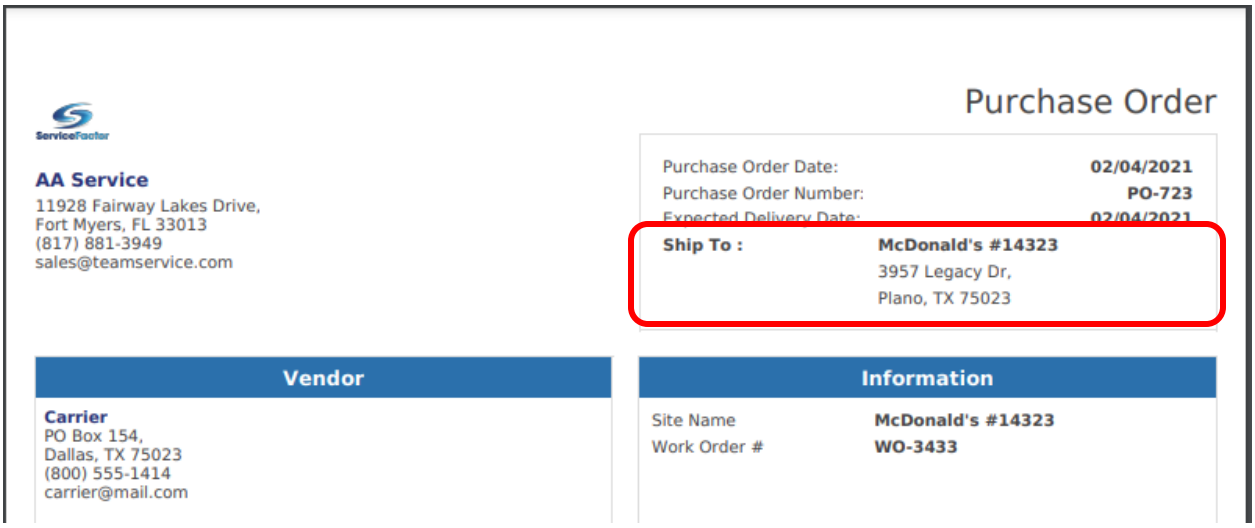


Purchase Orders

You can now add a "Ship To" location to Purchase Orders

A new "Ship To" field has been added to the Purchase Order screen that will allow you to choose where you would like the items on the Purchase Order to be shipped. The options are Don't Print, Main Office Address, Site Address or Will Call. The Ship To address will print at the top right hand side of the Purchase Order in the section with the Purchase Order Number, PO Date, etc.





Dashboard

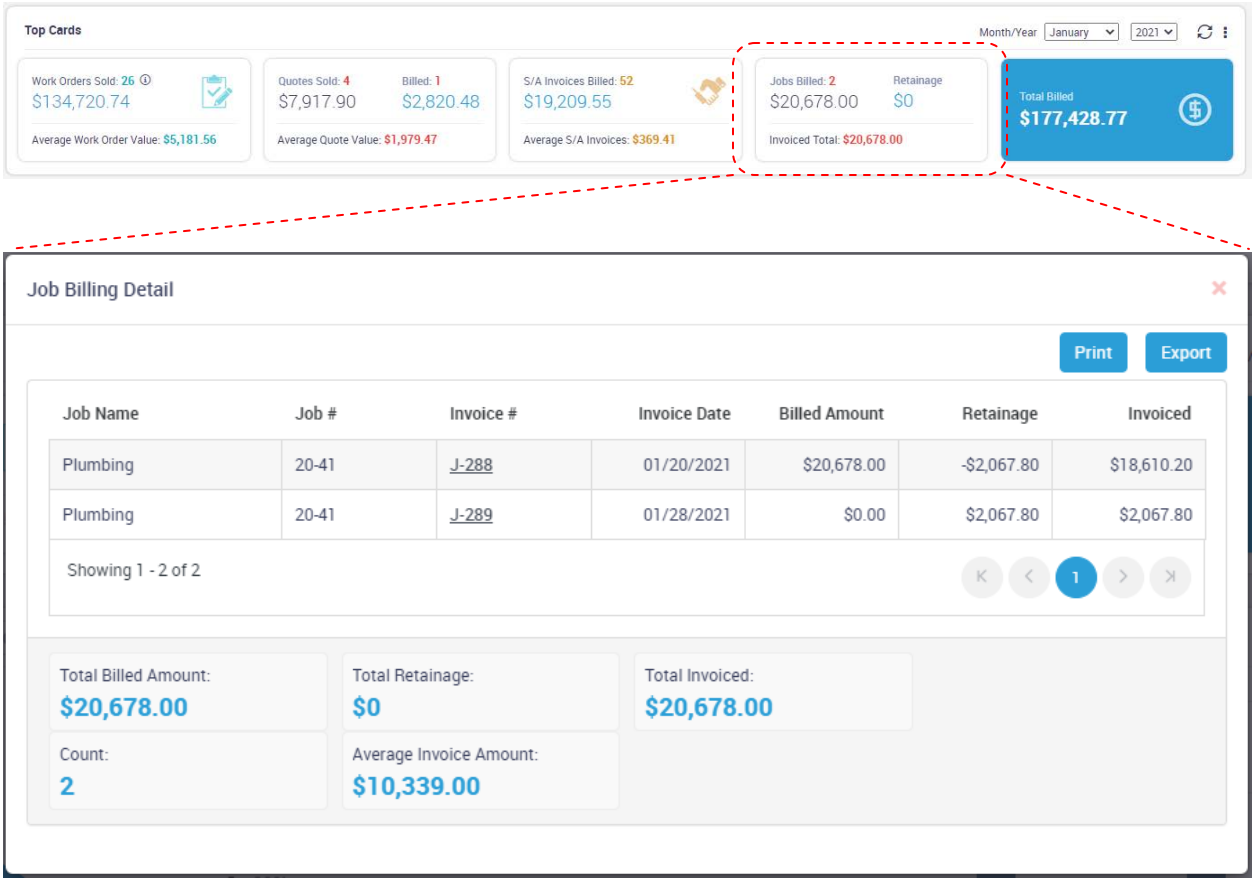
The Dashboard now has Drill-Down Capabilities and the ability to change Dates of various sections

Several sections of the Dashboard have been revamped and will now allow you to drill down in order to get the details that make up the numbers. With this release, you can drill down into the Top Cards, the Technician Score Card and the Service Agreement Sections and change the dates for the Top Cards and Technician Score Cards. Drill-Downs will be added to other sections in the near future.

Top Cards

The 5 boxes at the very top of the Dashboard are referred to as the "Top Cards". Each of the 5 Top Cards now has drill down capabilities and you can even choose the Month / Year for which you would like the numbers to reflect. By default, the Top Cards will show the "Current Month" when you first open the Dashboard, but you can choose a new Month and/or Year to display the details of a prior month. To drill down into a Top Card, simply click on the card and the detail that makes up the number will be displayed. You can even drill down into individual work orders or invoices from the detail list.

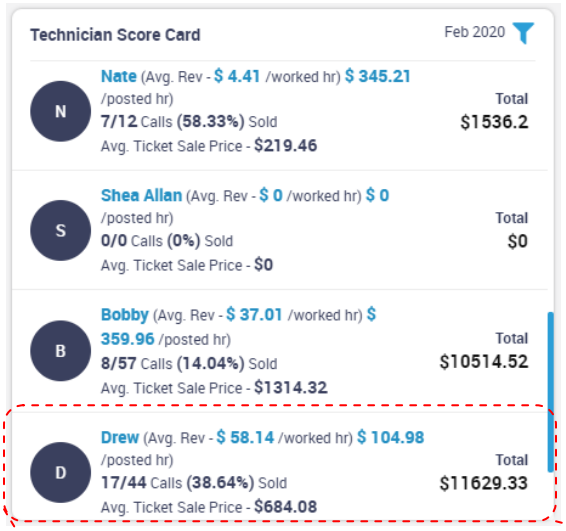
Helpful Tip – The "Quotes" Card has 2 drill downs, one for the Quotes Sold and another for the Quotes Billed. Click on either of these values to open the corresponding drill down.

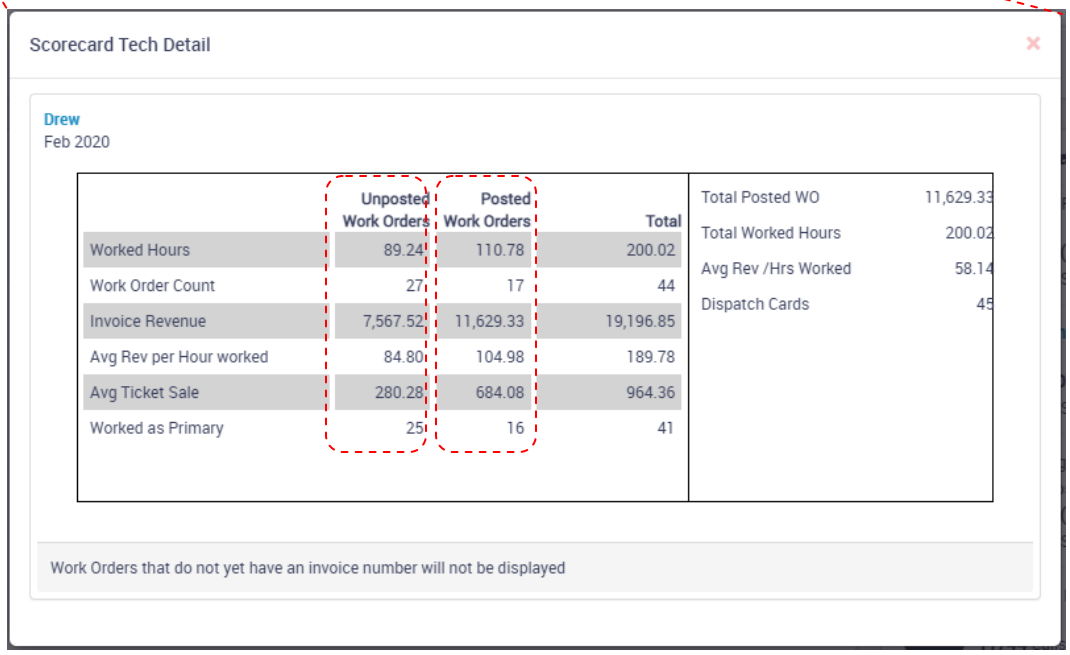


Technician Score Card

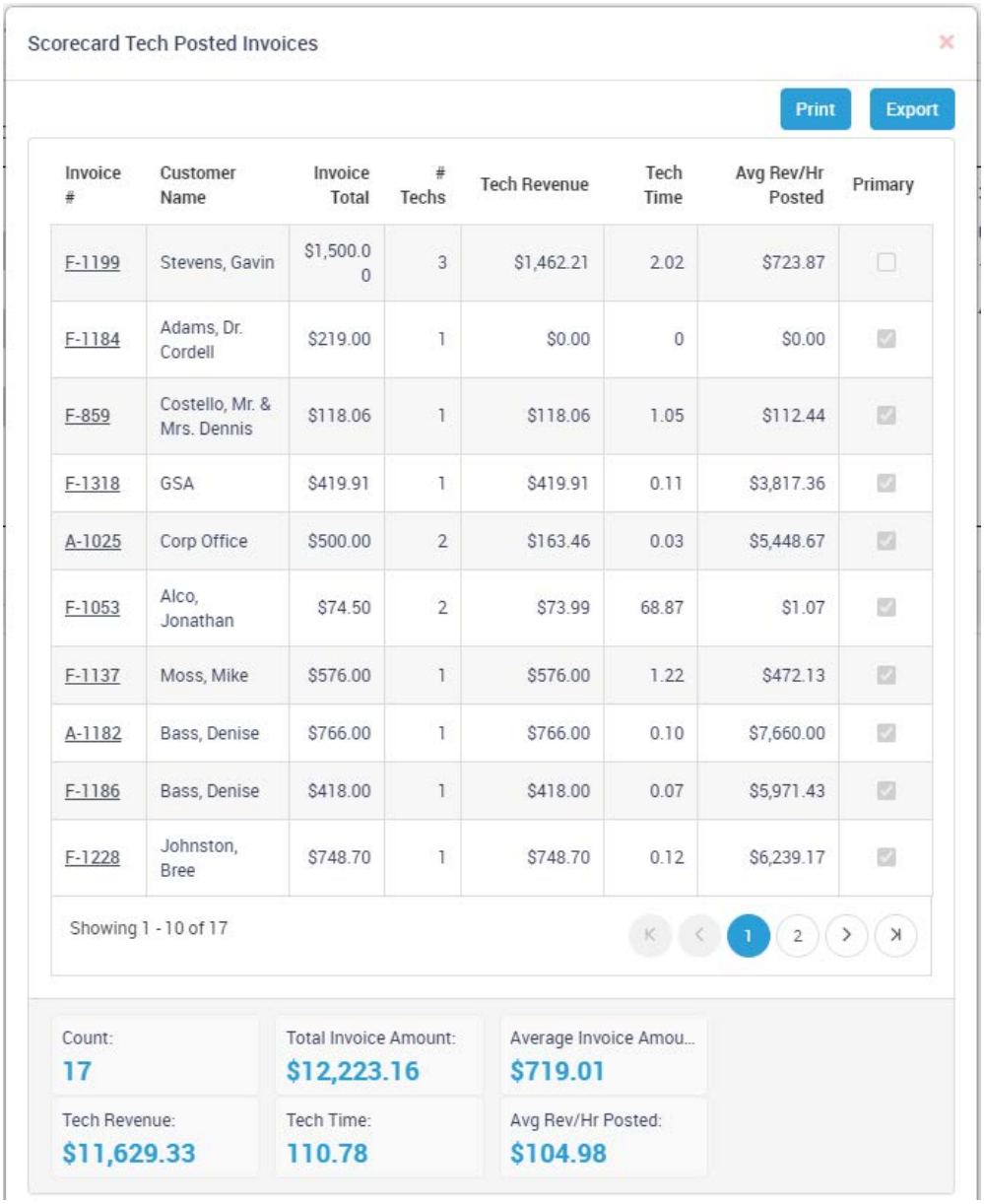
The Techncian Score Card now has Drill-Down capabilities and a new field has been added to the initial score card that shows the Average Revenue per Posted Hour. Prior to this release, it only showed the Average Revenue per Worked Hour, which included all invoices and all hours, whether the invoice was posted or not. The new field only includes hours that were on posted invoices, giving you additional information for evaluating a technician's performance.

When you drill down into a particular technicians score card, you will get more details about the numbers that make up the Score Card. From this screen you can drill down into the details that make up the Unposted Work Orders, as well as drill down into the details that make up the Posted Work Orders by clicking on the appropriate column.





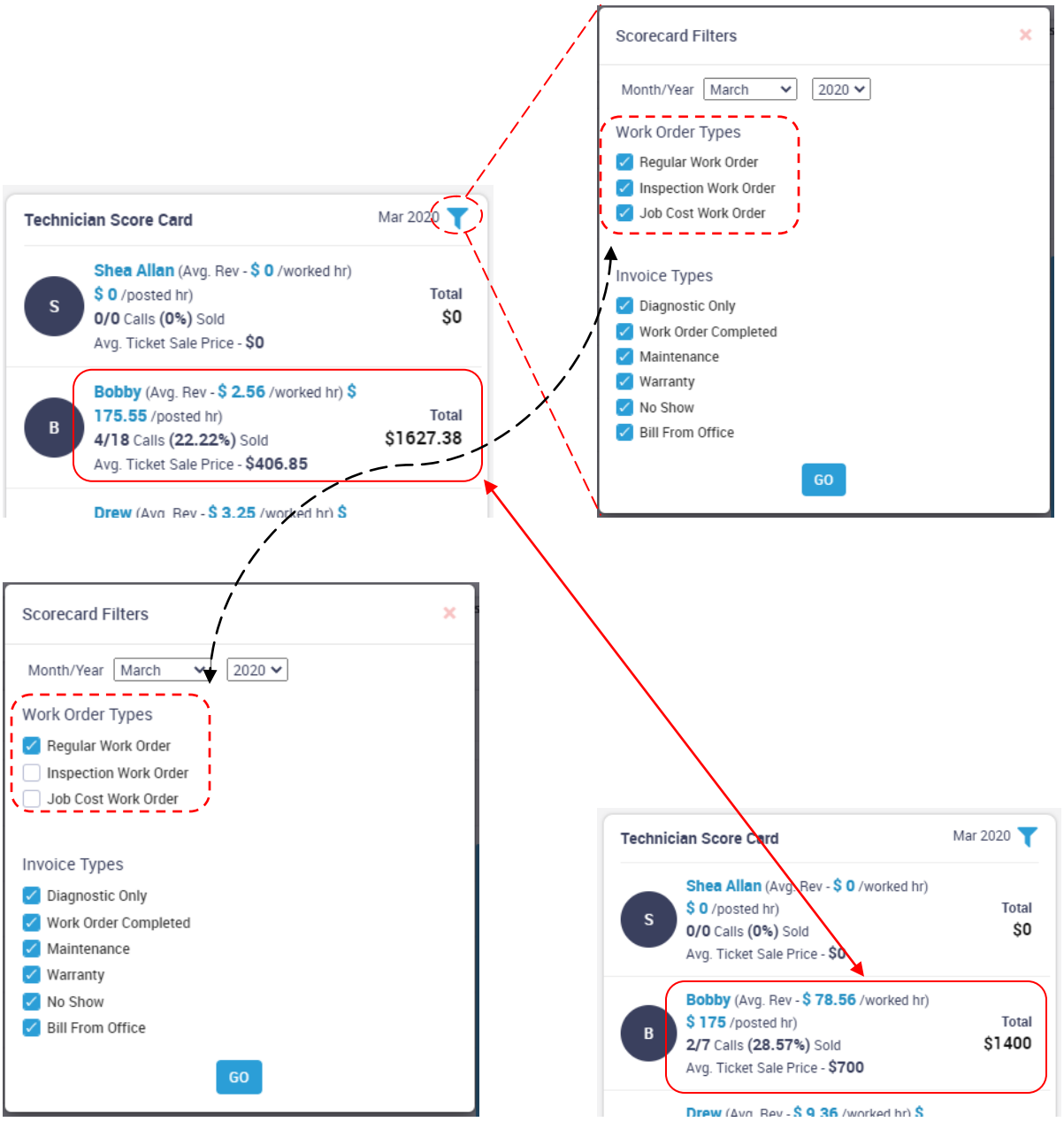
Drilling downfurther into the Posted or Unposted Work Order details will show you the details that make up the numbers. From here, you can click on the Invoice Number to view the details that make up a particular invoice.



Helpful Tip – You can use the “Print” or “Export” button at the top of the screen to Print or Export the data in the drill down.

Technician Score Card Filter Options

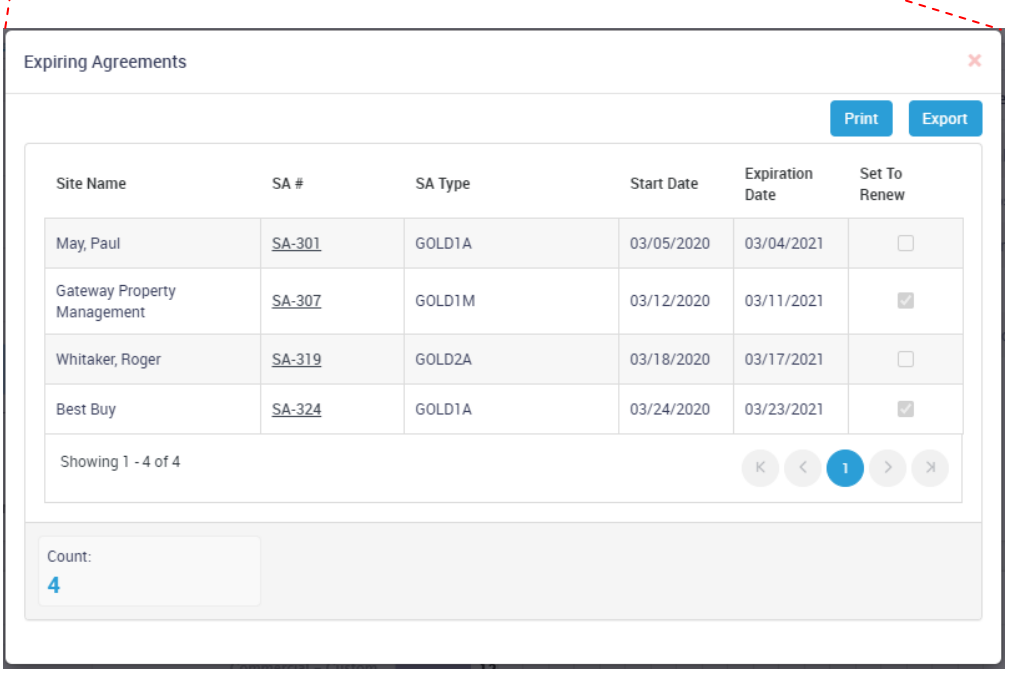
By default, when you access the Dashboard, the Technician Score Card section will display the values for the current month for all work order types and all Invoice Resolution Statuses. However, you can use the new filter option to display the values for specific Work Order Types and / or Invoice Resolution Status. This will allow you to get a better overview of Technicians performance based the type of work they performed. You will notice once you change the filters, the value of each Technician Score Card will change based on the filters selected.

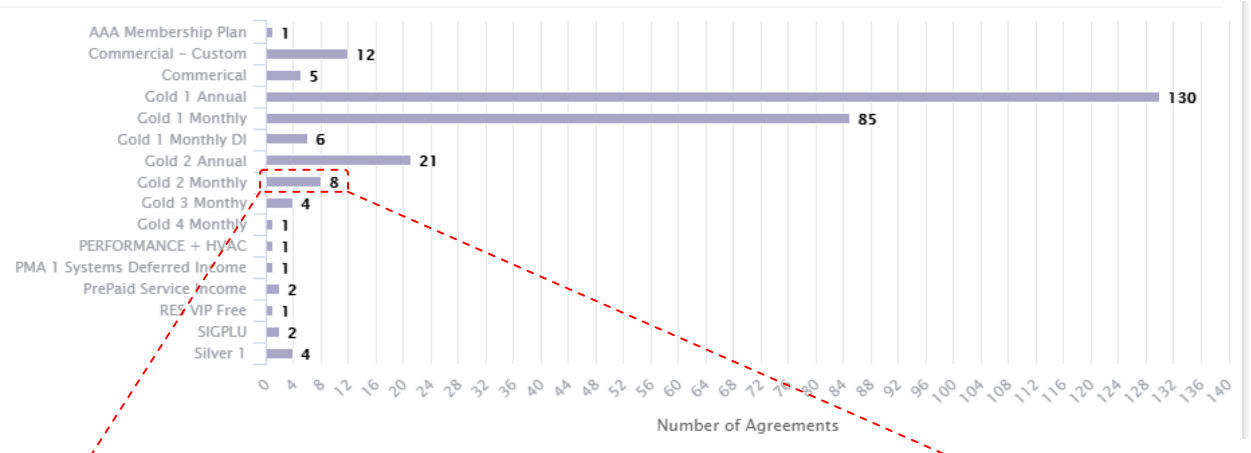


Helpful Tip – The Month and Year being displayed will appear next to the Filter Icon at the top of the Technician Score Card. When you exit the Dashboard, any filters you changed will be reset to the default the next time you access the Dashboard.

Service Agreement Dashboard Section

The Service Agreement section of the Dashboard will allow you to drill down into the Active Service Agreements, Scheduled Value of Billings Current Month, Planned Inspections and Contracts Expiring cards, as well as the ability to drill down into the details of each individual agreement type in the Grid. From each of the Drill Downs, you can drill down into a specific record if desired.





Active Gold 2 Monthly Agreements

Print Export

Site Name	SA #	SA Type	Start Date	Expiration Date	Auto Renew	Recurring
Gateway Middle School	SA-201	GOLD2M	12/08/2020		☐	☑
Gateway Property Management	SA-160	GOLD2M	09/30/2020		☐	☑
Gateway Property Management	SA-206	GOLD2M	11/30/2020		☐	☑
Gateway Property Management	SA-207	GOLD2M	11/30/2020		☐	☑
Gateway Property Management	SA-158-01	GOLD2M	09/01/2020	08/31/2021	☑	☐
Hughes, Amanda	SA-188	GOLD2M	11/11/2020		☐	☑
Townsend, Aimee	SA-191	GOLD2M	11/10/2020		☐	☑
Washington, Richard	SA-406	GOLD2M	11/01/2020	10/31/2021	☐	☐

Showing 1 - 8 of 8

1

Count:
8

Reports

Customer Billing Report

A new Customer Billing Report has been added to the system that can be used to determine all invoices billed to a particular customer with the invoice amount and the amount that is still due. From this report you can drill down directly into the Invoice or Payment screen for the selected invoice. By default, this report will only show open invoices for selected Customer(s), but can be filtered to show all invoices for the customer based on various filter options.

This report can be found under Reports / Customer Reports / Customer Billing Report

Project Management Profitability Report

A new filter has been added to this report that allows you to enter an "Ending" date for gathering the data. This will allow you to run the report and gather all costs and billings applied to the Job up until a specific date. Prior to this new filter option, the Profitability Report would gather all of the costs and billings up until the current date. This will now allow you to view the profitability of the Job up until a specific date, such as the end of the prior month, end of the most recent billing period for the job, etc. The new filter is called "Ending Date".

This report can be found under Reports / Project Management Reports / Project Management Profitability Report

Project Management History Report

A new filter has been added to this report that allows you to enter an "Ending" date for gathering the data. This will allow you to run the report and gather the history of the Job up until a specific date. Prior to this new filter option, the History Report would gather all of the detail up until the current date. This will now allow you to view the details of the Job up until a specific date, such as the end of the prior month, end of the most recent billing period for the job, etc. The new filter is called "Ending Date".

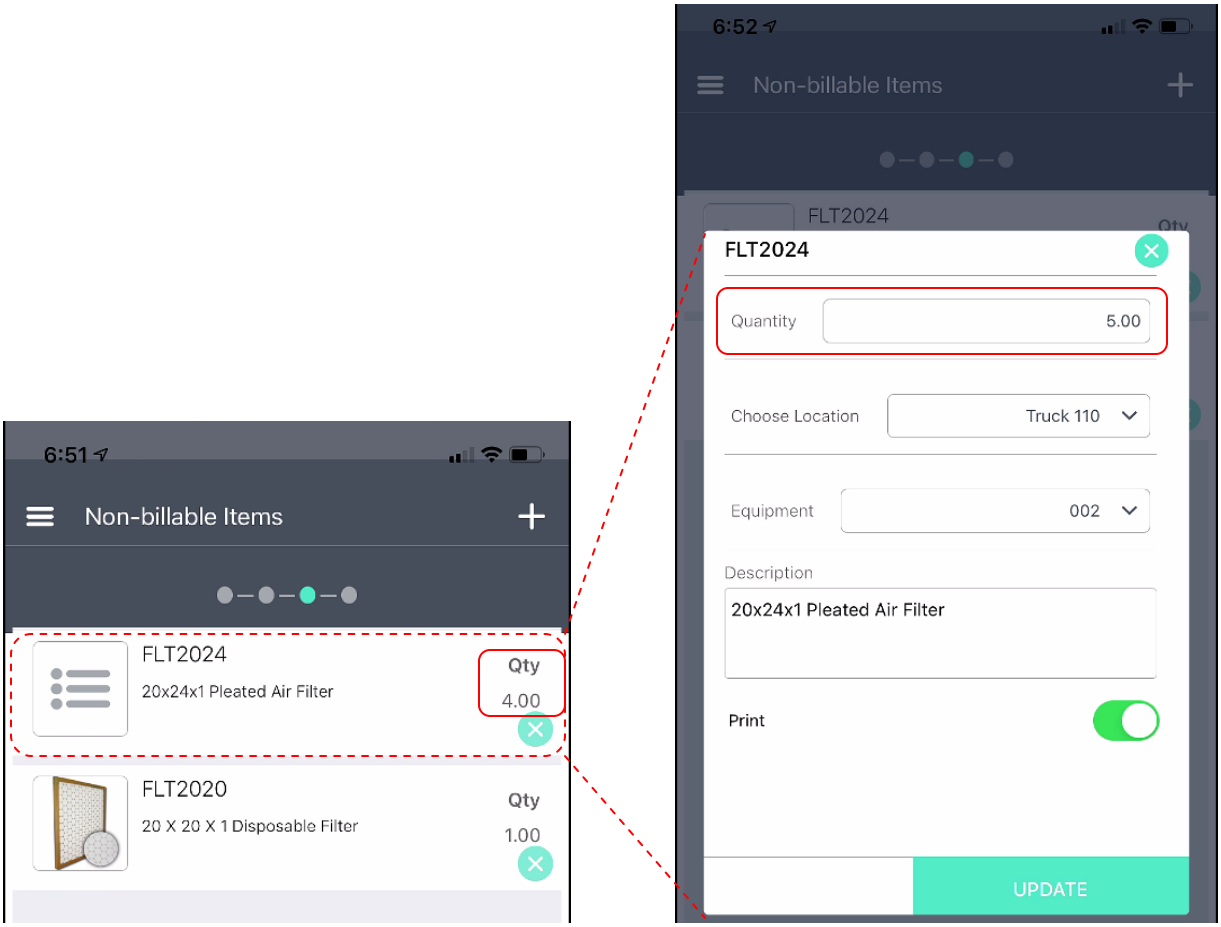
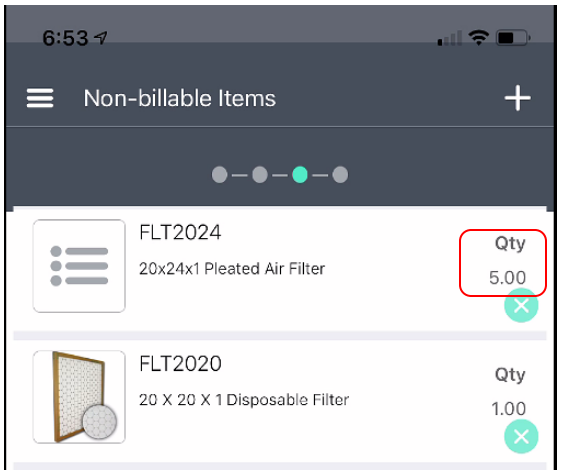
This report can be found under Reports / Project Management Reports / Project Management History Report

Project Management Over/Under Bonding Report

The "Ending Date" filter was added to the Over/Under Bonding Report in a prior update, but this is a reminder that the filter is also available in this report in case you did not notice.

This report can be found under Reports / Project Management Reports / Project Management Over/Under Bonding Report

ServiceFactor Mobile

Ability to Modify the Non-Billable Items on an Inspection Work Order

Technicians can now modify the quantity of non-billable items or delete non-billable items off of an Inspection Work Order in the field. Prior to this version, technicians were not allowed to modify the non-billable items that were set up on an inspection work order.