

# SF Release Notes: April 15, 2021

## Service Agreements

### A “Notes” field has been added to the Missed Inspections Listing

A new “Notes” field has been added to the Missed Inspections listing which will allow you to keep track of any notes, details, conversations, etc. that you may have had with the customer when trying to schedule the missed inspection. When you add a note, the system will automatically note the person adding the note as well as the date and time the note was added. If any notes have been added for the record, a check mark will appear next to the Notes Hyperlink indicating that there are notes associated with it. When you do schedule the inspection, any notes associated with the record will automatically be added to the Timeline of the Inspection Work Order.

Number	Customer Name	Info	Plan	Problem Code	Est. Time	Maintenance Date	Notes	Actions
SA-451	O'Rourke, Lisa	ⓘ	Gold 1 Annual	Insp 1	0.00	04/13/2021	<a href="#">Notes</a>	<a href="#">Schedule</a>
SA-349	Oppliger, Toni	ⓘ	Gold 1 Annual	Insp 1	0.00	10/01/2020	<a href="#">Notes ✓</a>	<a href="#">Schedule</a>
SA-164	Bass, Denise	ⓘ	Gold 1 Annual	Insp 1	40.00	02/02/2021	<a href="#">Notes ✓</a>	<a href="#">Schedule</a>
SA-128-01	Baker, Cindy	ⓘ	Gold 1 Annual	Insp 1	0.00	08/02/2020	<a href="#">Notes ✓</a>	<a href="#">Schedule</a>

Add Note

Note \*

William - 03/30/2021, 10:30 AM  
Called and LVM

Nate - 04/14/2021, 10:51 AM  
Denise returned the call and I scheduled the inspection

Cancel Save

## Invoice Listing

**You now have the option to E-Mail an invoice directly from the Invoice Listing Screen.**

You can now E-Mail an invoice directly from the Invoice Listing Screen. A new E-Mail icon has been added to the “Action” column that will automatically email the invoice without having to drill into the invoice. Simply click the “Envelope” icon, verify the E-Mail address and click Submit. This will email the invoice directly to the recipient.

Invoice #	Site Name	WO #	PO #	Invoice Date	Due Date	Total	Balance	Technician	Action	Saved
A-3265	Wealth Zone Group	WO-3758		04/13/2021	04/13/2021	\$383.25	\$383.25	Drew		✓
A-3307	Fields, Travis	WO-3800		04/04/2021	04/04/2021	\$30.00	\$30.00			-
A-3311	Zoller, Jayson	WO-3804		04/05/2021	04/05/2021	\$25.00	\$25.00			-
A-3306	Richards, Sean	WO-3799		04/04/2021	04/04/2021	\$25.00	\$25.00			-

**The Invoice List will now show if an invoice has been printed and/or e-mailed**

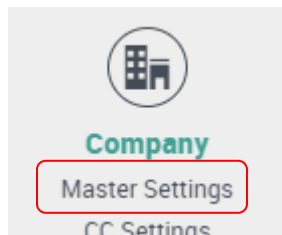
If an invoice has been Printed or E-Mailed, the Invoice List will indicate this by turning the Print and/or E-Mail icon green in the Action Column of the Invoice List. A gray icon indicates that the invoice has not been printed or e-mailed. Whether the invoice was printed or e-mailed from the Invoice Screen, the Invoice Listing or via ServiceFactor Mobile, the icon will turn green if it has been printed or e-mailed.

All Invoices (703)										Print	Export
										Search by Customer	
All	Recent	Current	Pending	Overdue	Auto CC Issue						
Invoice #	Site Name	WO #	PO #	Invoice Date	Due Date	Total	Balance	Technician	Action	Saved	
A-3265	Wealth Zone Group	WO-3758		04/13/2021	04/13/2021	\$383.25	\$383.25	Drew		✓	
A-3307	Fields, Travis	WO-3800		04/04/2021	04/04/2021	\$30.00	\$30.00			-	
A-3311	Zoller, Jayson	WO-3804		04/05/2021	04/05/2021	\$25.00	\$25.00			-	
A-3306	Richards, Sean	WO-3799		04/04/2021	04/04/2021	\$25.00	\$25.00			-	
A-328	Reynolds, Maurice	WO-364		08/01/2019	08/01/2019	\$25.00	\$25.00			✓	
A-3274	Smith, Joe	WO-3767		04/01/2021	04/01/2021	\$18.00	\$18.00	Drew		✓	
A-3262	Thompson, Tommy	WO-3755		04/01/2021	04/01/2021	\$640.25	\$640.25	Drew		✓	

## Quotes

### A Quote Footer has been added to the System Master Settings

A new Default Quote Footer has been added to the Master Settings that will print on Quotes generated from the Office or ServiceFactor Mobile. Prior to this release, the system used the Default Invoice Footer on Quotes. This will now give you more flexibility when generating Quotes.



#### Default Quote Footer

AA Service Company proposes to furnish, install and service under warranty equipment and related products in accordance with the conditions set forth in this proposal.

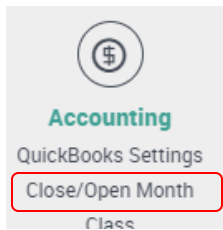
Purchaser acknowledges they have read, understand and agrees to the terms and conditions of this proposal, and authorizes AA Service Company to proceed with the work as proposed on approval and acceptance of this proposal by AA Service Company management.

# Accounting

## Ability to Close a Month in ServiceFactor has been added

A new “Month Closing” feature has been added to ServiceFactor. If you “close” a month, the system will not allow you to modify any “Posted” transactions with a date prior to the closing date, nor will it allow you to post any transactions with a date prior to the closing date. Some modifications that do not affect the general ledger will still be allowed, such as adding a Sales Person, a Purchase Order Number, Business Entity, etc. to an invoice, but any modifications that would cause the invoice to need to be re-posted to accounting will not be allowed.

The system will allow you to re-open a closed period if necessary, but will keep a history of whom and when periods were opened or closed. When you go to close a month, the system will automatically list any transactions that have a date on or prior to the closing date. If the transaction is listed as a “High Severity”, the system will not allow you to close until you post the particular transactions to accounting or change the transaction date. If the transaction is listed as a “Low Severity”, it means the transaction is still in process with a transaction date on or prior to the closing period, and the date will need to be changed until after the closing date if you proceed with closing.



The screenshot displays the 'Company - Close/Open Month' settings page. It includes tabs for 'Settings' and 'History'. Under 'Settings', there are fields for 'Current Closing Date' (12/31/2019) and 'Previous Closing Date' (12/31/2019). Below these are radio buttons for 'Close' (selected) and 'Open'. A 'New Closing Date' field is set to 01/31/2020. A 'Save' button is present. On the right side, there are 'Print' and 'Export' buttons. Below the settings is a table of transactions:

Invoice #	WO #	Invoice Date	Due Date	Total	Balance	Status	Severity
A-764	WO-871	01/22/2020	01/22/2020	\$274.69	\$0.00	Completed	HIGH
F-1133	WO-1306	01/29/2020	01/29/2020	\$450.06	\$0.00	Completed	HIGH
F-1124	WO-1290	01/21/2020	02/20/2020	\$501.78	\$0.00	Completed	HIGH
F-1011	WO-1159	01/22/2020	01/22/2020	\$1,500.00	\$0.00	Completed	HIGH
F-975	WO-1121	01/10/2020	03/10/2020	\$336.68	\$336.68	Completed	HIGH
A-914	WO-1043	01/02/2020	01/02/2020	\$327.76	\$9.09	Completed	HIGH
A-871	WO-992	01/20/2020	01/20/2020	\$0.00	\$0.00	Assigned	LOW
A-866	WO-987	01/23/2020	01/23/2020	\$0.00	\$0.00	Completed	LOW
A-864	WO-984	01/15/2020	01/15/2020	\$0.00	\$0.00	Assigned	LOW

## **Credits added in ServiceFactor will show the correct balance in ServiceFactor after being applied in QuickBooks Online**

Credits added in ServiceFactor and applied in QuickBooks Online will now show as being paid in ServiceFactor. Prior to this release, the credit would still show a balance when you went to the payment screen in ServiceFactor. Now when you go to the payment screen in ServiceFactor for the credit, the system will automatically refresh to reflect the “payment” and will show a \$0.00 balance.

## **A single payment made to multiple invoices in QuickBooks Online will now reflect as being paid in ServiceFactor when you go to the Payment Tab of the invoice.**

You can now apply a single payment for multiple invoices in QuickBooks Online and the payments will be reflected back in ServiceFactor when you go to the Payment Tab for the respective invoices. Prior to this release, a single payment applied to multiple invoices in QuickBooks Online would not reflect properly in ServiceFactor. **NOTE** – It is recommended that you apply single payments in ServiceFactor and let them feed to QuickBooks Online.

## **Reports**

### **Contract Reports**

#### **Contract Profitability Summary Report**

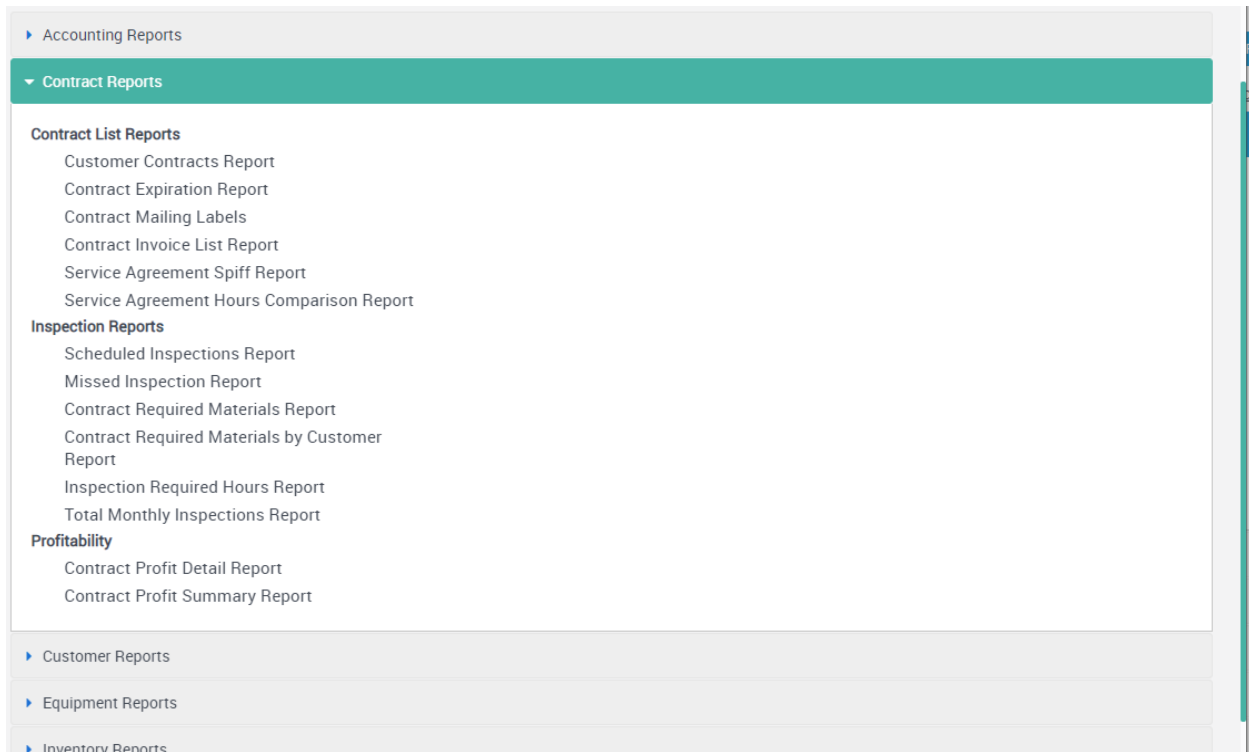
A new Contract Profit Summary Report has been added to the system. This report is an overview of the profitability of the selected Service Agreements. The overall sell price, amount billed and cost of each Service Agreement selected is provided along with the profitability as well as the scheduled number of inspections, the number of inspections created and the number remaining to be created.

#### **Contract Profitability Detail Report**

A new Contract Profit Detail Report has been added to the System. This report will show the same information as the Service Agreement Profitability Summary Report, but also shows the details of each Work Order/Invoice including the Material Cost, Labor Cost, Other Costs, Material Sell, Labor Sell and Other Sell prices of each Invoice.

## Overall Reports

The Report sections will now be listed in Alphabetical Order and the reports within each section have been grouped under appropriate headings making it easier to locate various reports.



## Dashboard

### The Marketing Section of the Dashboard has been overhauled

The Marketing Section has been revamped and will now allow you to drill down in order to get the details that make up the numbers. You can drill down into each value at the top of the detailed listing, as well as the each of the numbers associated with each individual lead source. The drill down will show you each record that makes up the number and can be printed or exported.

**Marketing** Week **Month** Year

No. of Leads <b>9</b>	Appt. Booked <b>7</b>	Invoice Count <b>11</b>	Revenue <b>\$8,300.82</b>	Avg. Sale <b>754.62</b>
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Lead Name	Leads	Booked	# Invoices	Total Revenue
Existing Customer	7	6	4	\$3,882.90
Google	2	1	3	\$3,870.67
Inspection	0	0	0	\$0
Mail	0	0	0	\$0
Yellow Pages	0	0	0	\$0

**Marketing Revenue** Print Export

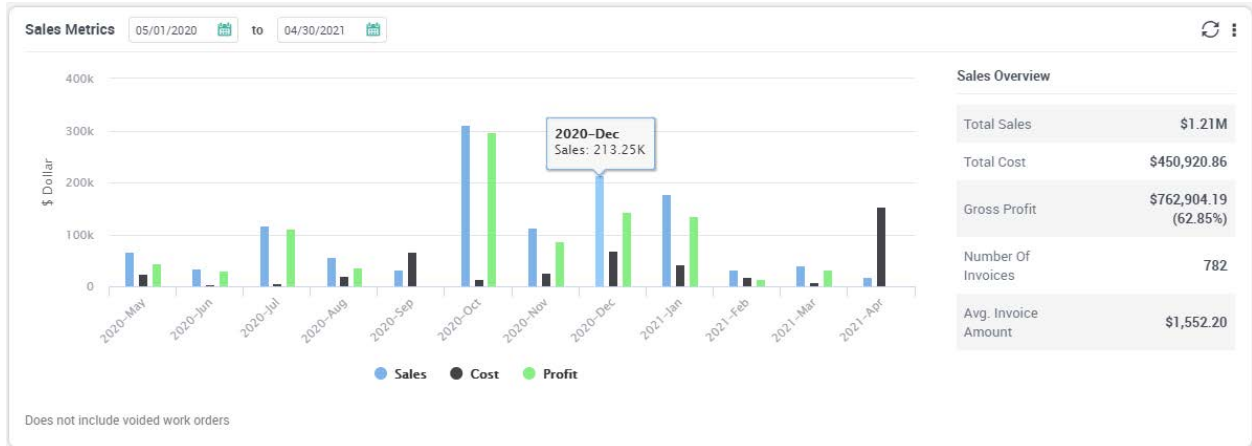
Lead Source	Type	Lead Date	Invoice #	Invoice Date	Customer Name	Business Entity	Revenue	Days
Existing Customer	WO	04/13/2021	<a href="#">F-3341</a>	04/13/2021	McDonald's Plano	Com HVAC Service	624.10	0
Existing Customer	WO	04/14/2021	<a href="#">F-3347</a>	04/14/2021	O'Rourke, Lisa		-106.75	0
Existing Customer	WO	03/24/2021	<a href="#">F-3227</a>	04/01/2021	McDonald's Plano	Com HVAC Service	763.63	8
Angies List	WO	09/11/2020	<a href="#">F-3301</a>	04/01/2021	Moss, Mike		288.55	202
Existing Customer	WO	03/02/2021	<a href="#">F-3246</a>	04/01/2021	Phillips, Greg	Res HVAC Service	2601.92	30
Angies List	WO	04/01/2021	<a href="#">F-3302</a>	04/01/2021	Baskin Robins		61.20	0
Angies List	WO	04/06/2021	<a href="#">F-3313</a>	04/06/2021	Roland, Michelle		233.87	0
Angies List	WO	04/06/2021	<a href="#">F-3314</a>	04/06/2021	Roland, Michelle		-36.37	0
Google	WO	04/06/2021	<a href="#">F-3315</a>	04/06/2021	Moss, Mike		-34.70	0
Google	WO	03/19/2020	<a href="#">F-1629</a>	04/08/2021	Oppliger, Toni	Res HVAC Service	105.37	385
Google	WO	04/13/2021	<a href="#">F-3339</a>	04/13/2021	O'Rourke, Lisa		3800.00	0

Showing 1 - 11 of 11 K < 1 > X

Number of Invoices: <b>11</b>	Total Revenue: <b>8300.82</b>
Average Days: <b>57</b>	Average Sale: <b>754.62</b>

## Sales Metrics Section has been overhauled and the Bar Graph now shows cost and gross profit

The Sales Metrics section has been updated and the graph changed to a bar graph so it will now show the Cost and Gross Profit in addition to the Total Sales. Hovering over any of the bars will show the actual value of the particular bar.



## ServiceFactor Mobile

### Corrected Issue with Invoice Number not always being passed to processor during Credit Card processing

In some instances, the Invoice Number was not always being passed to the Credit Card Processor when processing credit cards in ServiceFactor Mobile. This resulted in the Invoice Number not showing up in the Credit Card Transaction Report. This issue has been corrected and the Invoice Number should now be passed on all transactions.

### Ability to assign a Salesperson when adding a Work Order from the field

You can now assign a Salesperson when adding a Work Order from ServiceFactor Mobile. If the customer site has a Salesperson assigned, the system will automatically fill it in for you, but can be overridden if necessary.





## Create Work Order

Wednesday

### Phone

#### Mobile

(239) 555-3412

#### Email

nate@teamservice.com

#### Agreement

SA-101-Gold 1 Monthly



Mar 2021

Apr 2022

### Task

#### Problem Code \*

Res - No Cool



#### Estimated Time \*

02:00

#### Priority

Standard



#### Lead Source \*

Existing Customer



#### Service Agreement \*

SA-101-Gold 1 Monthly

#### Sales Person

William



#### Problem Reported

## Ability to Filter the Item Search Listing by Item Type

When using the “Search” field for items, you can now filter the type of items so that you can narrow it down to a specific type, as opposed to showing all items. Simply tap the drop down arrow beneath the Search Field and choose the type of Item you would like to filter. This will only list the items associated with the selected type.

