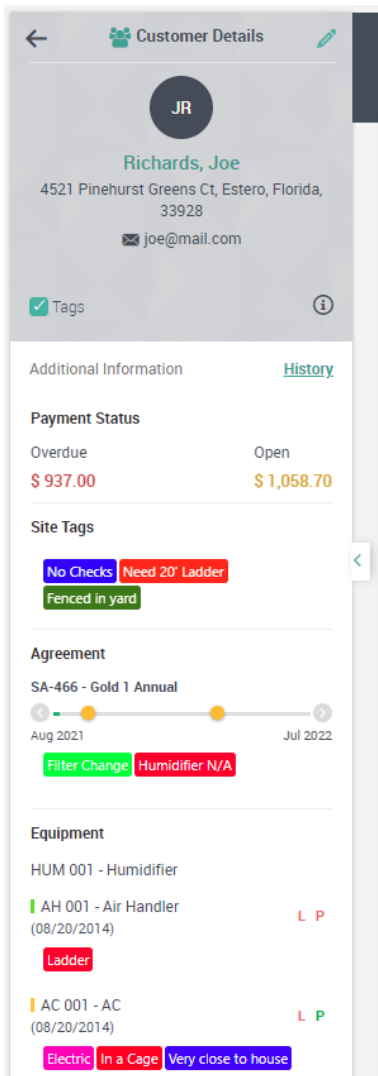


SF Release Notes: August 13, 2021

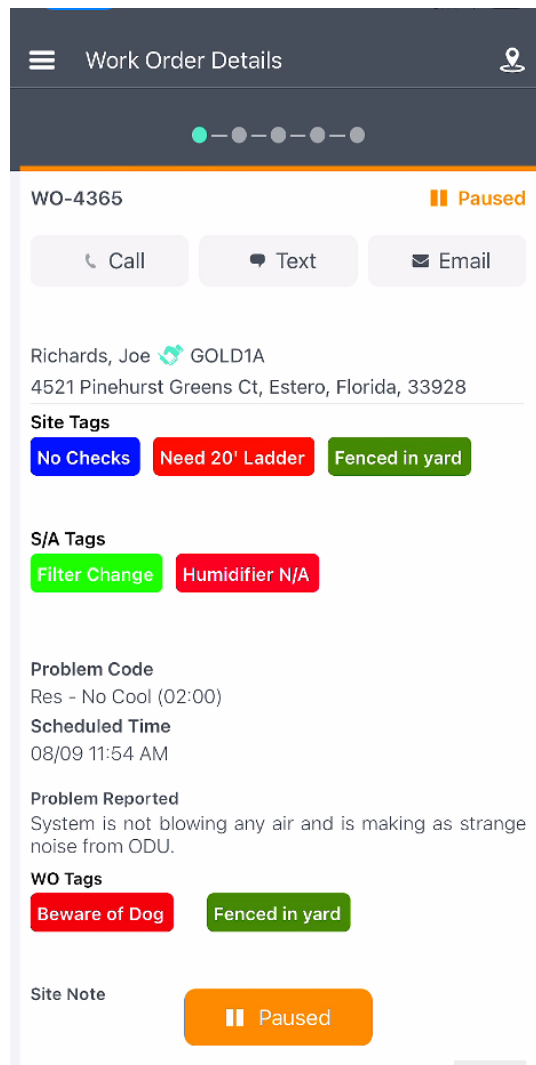
Tags Have Been Added to the System

Tags have been added to the Customer File, Equipment File, Service Agreements and Work Orders. Tags are a keyword or term assigned to a record that can be used as a filter and will display when viewing records. Tags can be color coded for maximum effectiveness. Tags will be seen in both the office version and mobile versions of ServiceFactor.

When viewing a customer, a service agreement or equipment, any Tags that have been assigned to the record will be displayed. When adding a new Work Order, or looking up a customer, any tags that have been assigned to the Customer, their Service Agreement(s) or Equipment will appear in the additional information section so that you can instantly see any important information. Tags will also appear in the Work Order Summary screen.



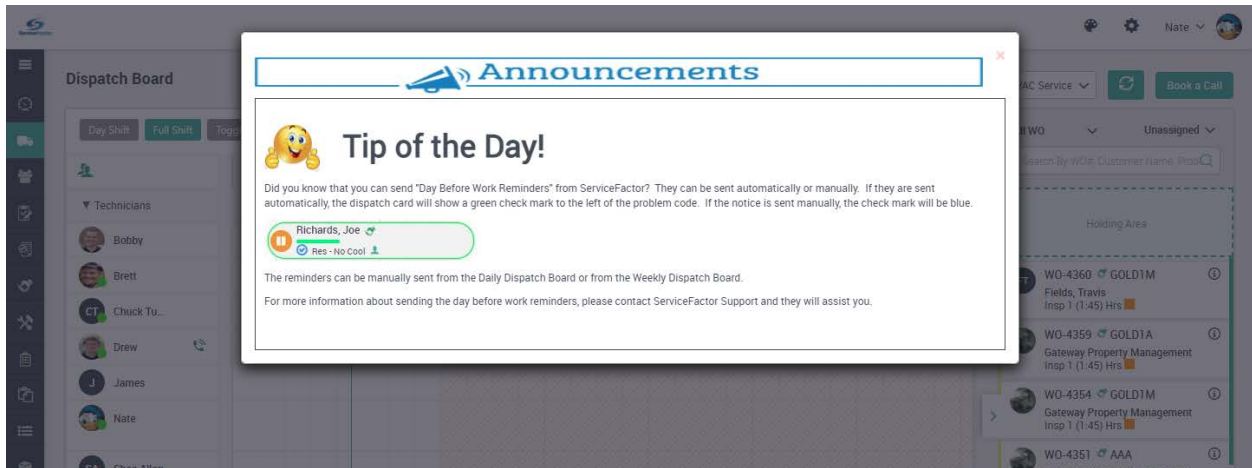
Office



Mobile

Announcements Popup has been added to the System

A new feature has been added to the system that will allow ServiceFactor the ability to send you important announcements, such as new release announcements, training announcements, “tip of the day” announcements, holiday greetings, etc. The announcement will appear one time on your screen when you change screens. To close the announcement, simply click the “X” on the top right hand side of the screen, and the announcement will be closed.



The Follow UP Date has been added to the Quotes Listing Screen.

The Follow-Up Date has been added to the Quotes Listing Screen. In addition to appearing in the list, it has also been added to the Advanced Filters so that you can quickly find quotes that need to be followed up upon during a specific time frame.

The image shows a screenshot of the "Quotes (4)" listing screen in the ServiceFactor software. The table displays the following data:

Quotes #	Site Name	Sales Person	Business Entity	Lead Source	Total Amount	Quote Date	Expiry Date	Follow Up	Status	Saved
513	Green, Jennifer	Drew		Angles List	\$0.00	07/14/2021	08/14/2021	07/14/2021	Pending	-
512	Thompson, Alex	Drew		Angles List	\$790.00	07/13/2021	08/13/2021	07/15/2021	Scheduled	✓
510	Bass, Denise	Drew		Existing Customer	\$572.00	07/14/2021	08/14/2021	07/14/2021	Pending	-
341	Jefferson, Rebekah	Drew		Existing Customer	\$572.00	07/16/2021	08/16/2021	07/16/2021	Accepted	-

The "Follow Up" column is highlighted with a red box. The table also includes a search bar, a "Print" button, an "Export" button, and a pagination control showing "Showing 1 - 4 of 4".

Dispatch Board

Site Notes are now displayed on the Work Order Summary Screen


Site Notes are now being displayed on the WO Summary Screen. You will find the Site Notes directly under the Problem Reported. Prior to this release, you had to view the WO Details to see the Site Notes associated with the record.

WO Summary : WO-4365 ✕

Richards, Joe [WO Details](#)
4521 Pinehurst Greens Ct, Estero, Florida, 33928
✉ joe@mail.com Tags ⓘ [Copy WO](#)

Problem Code Res - No Cool	Scheduled Time 08/09/2021 11:54 AM - 01:54 PM
Call Taken Date/Time 08/09/2021 11:41 AM	Promised Date/Time 08/09/2021 12:00 PM - 02:00 PM

Estimated Time 02:00 hrs	Est. Inspection Time -	Priority Standard	Zone ■ Estero
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Technician(s)


Problem Reported
System is not blowing any air and is making a strange noise from ODU.

Site Notes
Gate Code to subdivision is *4321. Commercial vehicles can only use the back gate. If you go to the front gate, they will refuse entry and direct you to the back gate.

Notes

Site and Equipment Tags will appear in the WO Summary Screen

If you have any Site or Work Order Tags associated with the Work Order being viewed in the WO Summary Screen, they will appear at the bottom of the WO Summary Screen.

WO Summary : WO-4365 ✕

Richards, Joe [WO Details](#)

RJ [Copy WO](#)


4521 Pinehurst Greens Ct, Estero, Florida, 33928


✉ joe@mail.com ✔ Tags ⓘ

Site Notes

Gate Code to subdivision is *4321. Commercial vehicles can only use the back gate. If you go to the front gate, they will refuse entry and direct you to the back gate.

Notes

 WO-4365 changed status to Paused
Added on 08/09/2021 12:22 PM

 WO-4365 changed status to Working
Added on 08/09/2021 12:17 PM

[View all](#)

Work Order Tags

Beware of Dog Fenced in yard

Site Tags

No Checks Need 20' Ladder Fenced in yard

✔

Invoice Listing

New “Completed” tab has been added

A new “Completed” tab has been added to the Invoice Listing screen. This tab will display any invoices that have a Resolution Status other than “None” (such as Diagnostic Only, Work Completed, Maintenance, etc.), do not have any open “Dispatch” records and have not been transferred to Accounting. These will typically be invoices that are ready to be reviewed and need to be transferred to Accounting.

The “Pending” tab Rules have been Modified

The “Pending” tab will now list invoices that have a Resolution Status of “None” or a Resolution Status other than “None” but still have open Dispatch Records (think of invoices where the “Change Status” button is not visible due to open Dispatch Records) and have not been transferred to Accounting. For example, the Resolution Status might be “Maintenance”, but there is an open dispatch record for the Work Order.

NOTE – The “Invoice Status” (Unassigned, Assigned, Completed, etc.) and the “Resolution Status” (None, Diagnostic Only, Work Completed, Maintenance, etc.) have been added to the Invoice Export screen.

The screenshot shows the 'All Invoices (865)' interface. At the top, there are tabs for 'All', 'Recent', 'Current', 'Overdue', 'Pending', and 'Completed'. The 'Completed' tab is highlighted with a red box. Below the tabs is a search bar labeled 'Search by Customer'. The main table lists invoices with columns: Invoice #, Site Name, WO #, PO #, Invoice Date, Due Date, Total, Balance, Technician, Action, and Saved. The first five rows of data are visible.

	A	B	C	D	E	F	G	H	I	J	K
1	Site Name	Invoice #	PO #	WO #	Invoice Date	Due Date	Total	Balance	Technician	WO Status	Invoice Status
2	Gateway Property Management	A-3826		WO-4361	08/09/2021	08/24/2021	3335.5	3335.5		Completed	Maintenance
3	Gateway Property Management	A-3823		WO-4356	08/07/2021	08/22/2021	216.5	216.5		Completed	Maintenance
4	Zoller, Jayson	F-1306		WO-1502	02/18/2020	02/18/2020	2165.25	1665.25	Drew	Completed	Work Completed
5	Parson, Sue	F-777		WO-883	01/12/2020	01/12/2020	419	419		UnAssigned	Diagnostic Only

Equipment Listing Screen

Model Year Start Year and End Year fields have been added to the Advanced Filters

The Model Year Start and End Years have been added to the Advanced Filter. Prior to this release, you could select a single year, but not a range of years in the Advanced Filter.

The screenshot shows the 'Equipment (274)' listing screen. The main table displays equipment details, and the right sidebar contains advanced filters. The 'MODEL YEAR' filter is highlighted with a red box, showing 'Start Year' set to 2010 and 'End Year' set to 2013.

Equ.Id	Site Name	Address	Equip.Type	Brand	Model	Labor	Parts	Status
HUM001	Weige, Eric	11733 Rosemount Dr, Fort Myers, Florida, 33913	Humidifier	AprilAire	APRIL 800			Active
AC001	Wilson, Trina	3100 Custer Rd, Plano, Texas, 75075	AC	Trane	4TTR6036J			Active
AH001	Wilson, Trina	3100 Custer Rd, Plano, Texas, 75075	Air Handler	Trane	TEM8A0C36			Active
		4521 Pinehurst						

ServiceFactor Mobile

Item Description box is no longer partially covered by the keyboard

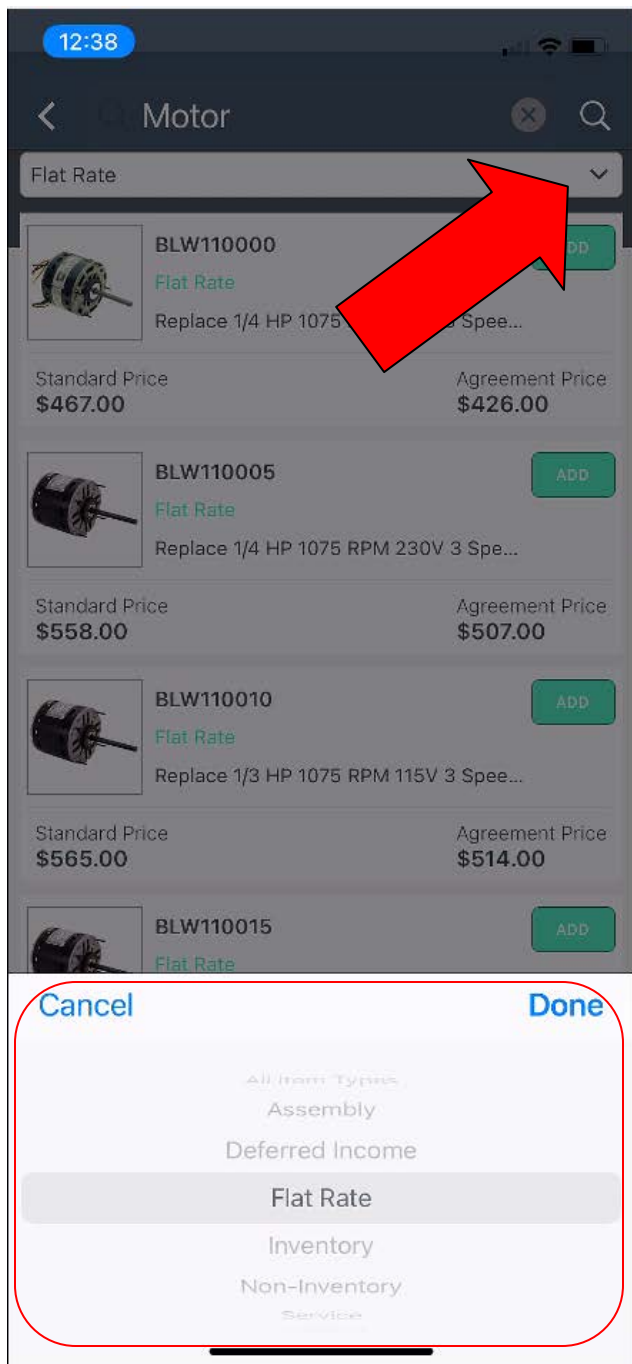
The item screen has been modified so that the Item Description box is no longer partially covered by the keyboard when editing the description.

The screenshot shows the 'CAP003' item screen on a mobile device. The description box is visible above the keyboard, and the keyboard is fully extended below it, indicating that the description box is no longer partially covered.

Quantity: 1.00
Edit Price: 32.58
Choose Location: Truck 102
Equipment: AC 001
Description: 7.5 Mfd 370V Premium Capacitor. Old capacitor was extremely swollen. This can be due to age, heat or from power cycling on and off. I strongly recommend you maintain your service agreement.
Print

Item Filter has been corrected

The Item Filter introduced in the last release in certain instances would not display the “Picker” to select an item type to narrow down your search. This release has corrected the issue that was causing the Picker to not be displayed. To filter which items you want to search, type the search criteria at the top of the screen and then tap on the drop down below the search field and choose the item type from the picker at the bottom of the screen. For example, you might want to search for “motor”, but only motors that are an item type of “Flat Rate” or “Inventory” for example.



Tags

You can view any tags that have been assigned to the Customer, Service Agreement(s), Work Order or Equipment for the Work Order you are viewing. The Customer, Service Agreement and Work Order tags will appear in the Work Order Details screen. Equipment tags will appear under each piece of Equipment. If a piece of Equipment has a tag associated with it, you will see a “Tag” icon next to the image of the equipment in the Equipment Screen. To see the tags associated with the Equipment, tap on the piece of Equipment to bring up the details.

NOTE – A technician can add tags to the Equipment from SF Mobile by editing the piece of Equipment and selecting a tag in the Tags section.

