

SF Release Notes: September 20, 2021

Ability to change the Problem Code after Work Order has been created

You will now be able to change the Problem Code on a Work Order after it has been created. This will allow you to change the problem code if the wrong code was originally selected, or if you would like to associate the Work Order with a different problem code after the technician has performed the service if the original problem code did not reflect the true issue. **NOTE** – You will be allowed to change the problem code up until the Work Order is posted to accounting. Once the Work Order is posted to Accounting, you will not be able to change the problem code.

Update Workorder - WO-4604

Green, Bill
5370 Congo Ct., Cape Coral, Florida, 33904
(239) 456-1234 bill@mail.com

Work Order Invoice

Additional Information Tags History

Payment Status
Overdue \$ 471.84 Open \$ 471.84

Site Tags
None

Agreement
SA-380 - Gold 1 Monthly
Jul 2021 Jul 2022

Equipment

Name / Description: Bill
Mobile: (239) 456-1234
Phone:
Email: bill@mail.com

Problem Code *
Res - No Cool

Class: Residential
Estimated Time: 02:00
Priority: Standard

Lead Source *
Google

Service Agreement *
SA-380 - GOLDIM

Business Entity: Res HVAC Service
Quote Number: Enter Quote Number

Zone: Estero
Color: ■
Tags: Beware of Dog *

Problem Reported
System is not blowing any air

Site Notes
Gate Code *1234 - Do not let dog out of fence.

Timeline Notes can be manually added to Equipment

You can now manually add Timeline Notes to a piece of equipment.

View Equipment

Whitaker, Roger
4537 Pinehurst Greens Ct, Estero, Florida, 33928

Equipment Information

Equipment Id *
ACT02

Brand: Trane
Equipment Type: AC
Model Year: 2016

Location:
Service Area:
Sub Equipment Of:

Installed By Us

Installation Date: Labor Warranty: Paris Warranty:

Add Note

Note *
Bottom of unit is in bad shape due to dogs

Cancel Save

Keyword Search
2021 Add Notes

09/17/2021
Equipment Id changed from AC100 to AC102. Drew 12:29 AM

03/18/2020
Equipment Id changed from 100 to AC100. Nate 10:31 AM

100 was created. Drew 10:09 AM

Service Agreements

A “Skip Invoice” option has been added to the Service Agreement Billing Schedule.

A new “Skip” option has been added to the Service Agreement Billing schedule screen. This option is beneficial for customer’s that renew service agreements on their last inspection, as opposed to letting the system automatically renew the agreement. If you collect for the renewal on a different invoice, you can renew the agreement early and mark to skip the upcoming billing. This will stop the system from automatically generating and sending the service agreement invoice to the customer. This feature is also useful for new users of ServiceFactor that are back loading their Service Agreements and have already billed prior invoices.

The screenshot displays the 'View Agreement - Pierce, Riley' interface. At the top, there are 'Renew' and 'Edit' buttons. The customer information includes 'Pierce, Riley' with address '5304 Iris Circle, Bossier City, Louisiana, 71112' and phone '(214) 555-1414'. The 'Billing Schedule' tab is active, showing 'Billing Type' with 'Bill From Office' selected, 'Allow To Pay Bill Online' set to 'NO', and 'Deferred Income' checked. The 'Invoice Schedule' section shows a date of '09/03/2021' and a total amount of '\$150.00'. A red box highlights the 'Skip' button next to the invoice.

Inspection Work Orders will now include the Billable and Non Billable Items in the Problem Reported Description.

When the system creates an Inspection Work Order, any items that are associated with the inspection will now be added to the Problem Reported section of the Work Order. This will allow you to see the items needed for an inspection without having to go to the Billable and Non Billable screens of the Work Order in ServiceFactor Mobile or the Invoice Screen in the office to see what items are needed for the inspection. The information included will be the Item Name, the Quantity, the Equipment ID and the Equipment Model Number.

Edit Agreement - Adamson, John Cancel Save

Adamson, John
5841 Inverness circle, Fort myers, Florida, 33903
(239) 768-0343
nate@teamservice.com

General Billing Schedule **Maintenance Schedule**

Set Inspection schedule
[Select/View Timetable](#)

Inspection schedule

Confirmation	WO #	Problem Code	Est. Time	Equipment	Schedule date	Next Date	Non Billable	Billable	Amount(\$)
<input checked="" type="checkbox"/>	WO-4613	Insp 1	0.00	<div style="border: 1px solid red; padding: 2px;"> AC001 AH001 </div>	10/01/2021	04/01/2022	<div style="border: 1px solid red; padding: 2px;"> FLT2020 CHM005 </div>	<div style="border: 1px solid red; padding: 2px;"> PMA 1 Annual HUMINSP </div>	175.00

Update Workorder - WO-4613 Save

Adamson, John
5841 Inverness circle, Fort myers, Florida, 33903
(239) 768-0343 (239) 707-0243
nate@teamservice.com

Work Order Invoice

Additional Information Tags [History](#)

Payment Status
Overdue \$ 727.20 Open \$ 902.20

Site Tags
None

Agreement
SA-499 - Gold 1 Annual
Sep 2021 - Aug 2022

Name / Description: John
Mobile: (239) 707-0243
Phone: (239) 768-0343
Email: nate@teamservice.com

Problem Code: Insp 1
Class: Residential
Estimated Time: 01:45
Priority: Inspection

Lead Source: Google
Service Agreement: SA-499 - GOLD1A
Business Entity: Search and select
Quote Number: Enter Quote Number

Zone: North FM
Color:
Tags:

Problem Reported
Seasonal Inspection on 1 System

PMA 1 Annual QTY 1.00 ID : AC001 - 4TTR6036J
HUMINSP QTY 1.00 ID : AC001 - 4TTR6036J
FLT2020 QTY 2.00 ID : AH001 - TEM8A0C36
CHM005 QTY 5.00 ID : AH001 - TEM8A0C36

Work Order Details

Problem Code
Insp 1 (01:45)

Scheduled Time
09/17 06:30 PM

Problem Reported
Seasonal Inspection on 1 System

PMA 1 Annual QTY 1.00 ID : AC001 - 4TTR6036J
HUMINSP QTY 1.00 ID : AC001 - 4TTR6036J
FLT2020 QTY 2.00 ID : AH001 - TEM8A0C36
CHM005 QTY 5.00 ID : AH001 - TEM8A0C36

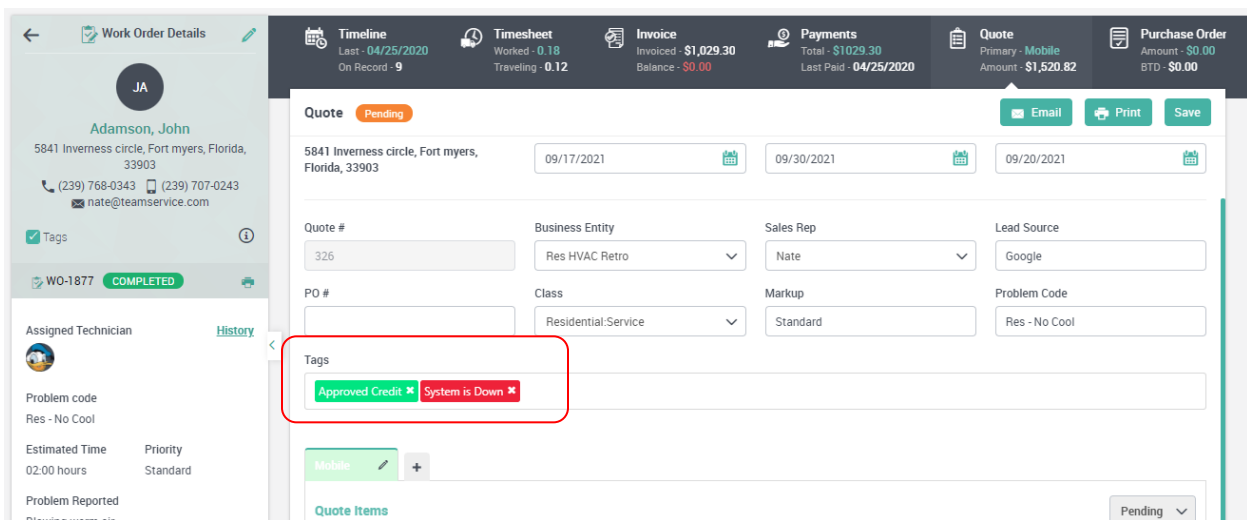
WO Tags
--None--

Quotes

Tags have been added to the Quotes Module

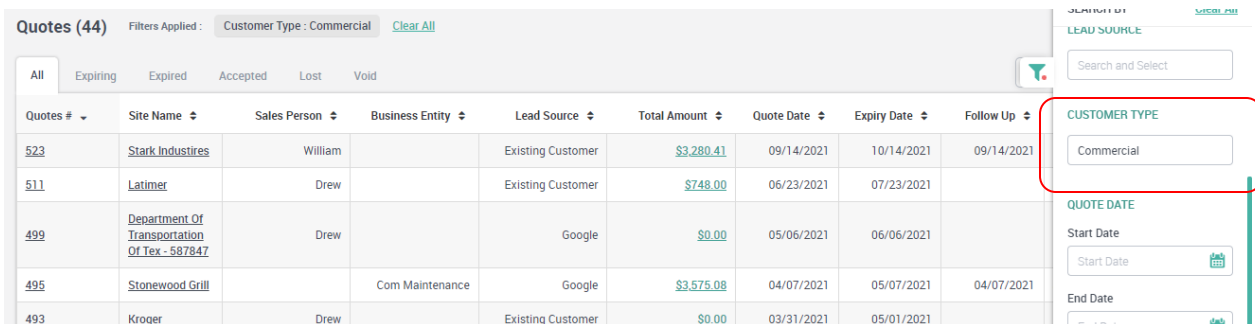
In the last release, we added Tags to the Customer, Equipment, Service Agreement and Work Order modules. This release added Tags to the Quotes Module. Tags are a keyword or term assigned to a record that can be used as a filter and will display when viewing records. Tags can be color coded for maximum effectiveness.

When viewing a quote, Tags that have been assigned to the record will be displayed. You can use the advanced Quote Filters to search for quotes that have specific tags, such as approved credit, if the system is down, if they are making a quick decision, etc.



Customer Type has been added to the Advanced Filter Search for Quotes

A new filter for Customer Type has been added to the Advanced Filter selection for Quotes. This will allow you to filter the lists based on the Customer Type.



Items

Ability to Toggle between Price, Cost and Last Cost has been added to the Items Listing Screen

When you are viewing the Item List, you now have the option to Toggle between the Sell Price, the Cost or the Last Cost of an item. This will allow you to see this various information without having to drill down into the individual item. When you click the Toggle button, the heading and the data will change in the “Price” column. **NOTE** – The Price is the default sell price (but can change based on the customer’s markup table), the Cost is the “List Cost” of the item and the Last Cost is the last price you paid for the item.

Items (661)

QB Sync Print Export

All Items **Inventory** Non Inventory Assembly Flat Rate

Toggle Cost + Add Search by Name

Click to Toggle

Name	Description	Category	Price	Item Type	Qty Available	Reorder Point	On Order	Status	Actions
MOT005	3/4 hp 1075 RPM Cond Mtr	Condenser Motors	\$ 255.94	Inventory	16.00	●	7.00	Active	View
TSTAT010	7 Day programmable Honeywell Thermostat		\$ 241.57	Inventory	-1.00	●	0.00	Active	View
CAP021	7.5 Mfd 440V Premium Capacitor	Capacitors	\$ 15.95	Inventory	10.00	●	0.00	Active	View
FLT12X12	12 X 12 Pleated Filter	H.E. Filter Media	\$ 8.00	Inventory	12.00	●	0.00	Active	View

Items (661)

QB Sync Print Export

All Items **Inventory** Non Inventory Assembly Flat Rate

Toggle Cost + Add Search by Name

Name	Description	Category	Cost	Item Type	Qty Available	Reorder Point	On Order	Status	Actions
MOT005	3/4 hp 1075 RPM Cond Mtr	Condenser Motors	\$ 135.00	Inventory	16.00	●	7.00	Active	View
TSTAT010	7 Day programmable Honeywell Thermostat		\$ 130.00	Inventory	-1.00	●	0.00	Active	View
CAP021	7.5 Mfd 440V Premium Capacitor	Capacitors	\$ 6.50	Inventory	10.00	●	0.00	Active	View
FLT12X12	12 X 12 Pleated Filter	H.E. Filter Media	\$ 4.00	Inventory	12.00	●	0.00	Active	View

Items (661)

QB Sync Print Export

All Items **Inventory** Non Inventory Assembly Flat Rate

Toggle Cost + Add Search by Name

Name	Description	Category	Last Cost	Item Type	Qty Available	Reorder Point	On Order	Status	Actions
MOT005	3/4 hp 1075 RPM Cond Mtr	Condenser Motors	\$ 127.97	Inventory	16.00	●	7.00	Active	View
TSTAT010	7 Day programmable Honeywell Thermostat		\$ 125.00	Inventory	-1.00	●	0.00	Active	View
CAP021	7.5 Mfd 440V Premium Capacitor	Capacitors	\$ 6.23	Inventory	10.00	●	0.00	Active	View
FLT12X12	12 X 12 Pleated Filter	H.E. Filter Media	\$ 3.78	Inventory	12.00	●	0.00	Active	View

Listing Screens

The ability to “Lock” filters has been added to additional Lists”

Previously, the ability to “Lock” the advanced filters was added to the Work Orders and Invoice Listings. This release adds the ability to “Lock” the filters for the Customer Listing, Agreements Listing, Equipment Listing, Quotes Listing, Project Management Listing and Items Listing.

If you choose to “Lock” the advanced filter options, the system will maintain the filter(s) you have chosen even if you leave the particular listing screen. For example, you might want to search for Service Agreements that have a particular “Tag” assigned to them. If this is the case, you can select the specific tags and put a check mark in the “Lock Filter” check box. This will maintain the filter each time you go back into the “Agreements” menu option until you remove the check mark, or click the “Clear All” link next to the filters applied at the top of the listing screen.

The screenshot displays the 'Agreements (3)' listing screen. At the top, there are filter controls: 'Filters Applied:' with a 'Filter Change' button and a 'Clear All' link. Below this is a table of agreements with columns for Number, Customer Name, Info, Plan, Start Date, Expiry Date, and Renewal Date. The table contains three rows of data. On the right side, there is a sidebar with search and filter options, including 'SEARCH BY', 'PLAN', 'STATUS', and 'TAGS'. At the bottom of the sidebar, there is a 'Lock the Filter' checkbox, which is checked and highlighted with a red box.

Number	Customer Name	Info	Plan	Start Date	Expiry Date	Renewal Date
SA-459	John_Steve	ⓘ	Gold 1 Annual	04/01/2021	03/31/2022	
SA-466	Richards_Joe	ⓘ	Gold 1 Annual	08/01/2021	07/31/2022	
SA-484	Thompson_Joe	ⓘ	Gold 1 Annual	09/03/2021	09/02/2022	

Reports

The “Tags” filter has been added to several reports

The Tags Filter will allow you to run various reports and select the data based on tags assigned the various records. You can enter multiple tags in the filter if desired. If you enter multiple tags, the system will look for records that contain each tag on the single record. For example if you enter 2 tags in the filter, the record must contain both tags in order to be selected. If only one of the tags entered is on the record, it will not be selected. The following reports can be filtered by tags:

Contract (Service Agreement) Reports

- Customer Contract Report
- Scheduled Inspection Report
- Contract Required Materials Report
- Contract Required Materials by Customer Report
- Contract Profit Detail Report

Customer Reports

Customer List Report

Equipment Reports

Equipment List

Work Order Reports

Scheduled Calls Report

Unassigned Calls Report

Work Order Profitability Report

Quote Reports

Estimate Aging Report

Quote Status Report