

SF Release Notes: November 23, 2021

The ability for your customers to pay their invoices online has been added to the system

You now have the option to allow your customers to pay their invoices online. When you finalize an invoice, there is a new slider on the invoice screen to “Allow To Pay Bill Online”. If you set this slider to “Yes”, a link will be included on the invoice when you email it that the customer can click to pay the bill online. When the customer clicks the link to pay the invoice, it will list ALL open invoices for the customer that have been marked to be allowed to be paid online. The customer can choose which invoices, as well as the amount they would like to pay for each invoice (although it will default to the full amount when they select an invoice) and securely enter their Credit Card information. Once they submit the payment, the Credit Card will be processed and if successful, they will receive a confirmation of their payment, your office will be emailed indicating that you received a payment online, and if the invoice has already been posted to Accounting, the payment will automatically be posted to your Un-Deposited Funds account. If the invoice has not been posted to accounting, the payment will be posted to accounting when you post the invoice.

The “Allow to Pay Bill Online” option is available in both the Office version and the Mobile Version of ServiceFactor. In addition to selecting the option to pay the bills online when sending an invoice, you can also set up Service Agreement Invoices to automatically be allowed to be paid online when they are created.

NOTE – Please contact a ServiceFactor Support Technician for more details and to have this feature activated for your company. You must be using an approved Credit Card Processor to use this feature.

The screenshot displays the ServiceFactor Invoice interface. At the top, a navigation bar includes links for Timeline, Timesheet, Invoice, Payments, Quote, and Purchase Order. The main section is titled 'Invoice' and contains various fields for customer information, terms, and dates. A red box highlights the 'Allow To Pay Bill Online' slider, which is currently set to 'YES'. A callout box points to this slider with the text: 'Set Slider to "Yes" to allow your customer to pay the bill online.' Below the main form, there is a table of 'Invoice Items' with columns for Location, Item, Description, Qty, Rate (\$), Amount (\$), Tax, Equipment, Class, and Print. The table lists two items: a 30-minute diagnostic and a replacement of a 1/4 HP 1075 RPM 230V 3 Speed motor.

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
Main	DIA110010	30 minute diagnostic	1.00	82.00	82.00			Residential	YES
Main	RIW110005	Replace 1/4 HP 1075 RPM 230V 3 Speed	1.00	507.00	507.00		AH001	Residential	YES

INVOICE F-4337 Details

Due: 11/21/2021

\$589.00

Click to Pay Invoice Online

PROCEED TO PAYMENT

Powered by Service Factor



Bill to Maurice Reynolds

Terms Due on receipt

Balance Due \$589.00

Thank You for your Business.

PROCEED TO PAYMENT

Powered by Service Factor

AA Service

11928 Fairway Lakes Drive,
Fort Myers, FL 33013
(817) 881-3949

sales@teamservice.com



AA Service
11928 Fairway Lakes Drive
Fort Myers, FL 33013
(817) 881-3949

Reynolds, Maurice
11410 Bent Pine Drive

Invoice List

Invoice #	Invoice Amt	Due Amount	Payment Amount
<input checked="" type="checkbox"/> F-4337	\$589.00	\$589.00	589.00

Invoice Totals: **\$589.00**

Total Due: **\$589.00**

Payment Total: **\$589.00**

Secure Payments Form

Card Info

Card number

Date (MM/YYYY)

MM / YYYY

CVV # (Security Code)

Submit

VISA



Following is the message a customer will receive after they have made an online payment.

	AA Service 11928 Fairway Lakes Drive Fort Myers, FL 33013 (817) 881-3949
Reynolds, Maurice 11410 Bent Pine Drive	
Payment Accepted	
Paid To: AA Service Paid: \$589.00 Card Type: MasterCard Card #: 9130 Transaction #: 000000020105	
Print	

Following is the Email that will be sent to your office indicating that you have received an online payment.

A payment has been received
Service Factor - Online Payments <environ.servicefactor@gmail.com>
Sent: Mon 11/22/2021 11:16 AM
To: AA Service
<hr/>
Online Payment Received
Invoice#: F-4337
Paid: \$589.00
Card Type: MasterCard
Card #: 9130
Transaction #: 000000020105

Tags can now be added to Inspection Work Orders in the Maintenance Schedule

You now have the option to add tags to the Inspection Work Orders. If you add tags to the Maintenance Schedule, they will be included on the Inspection Work Order when the system creates it. You can choose to add different tags for each Inspection, the same tags for all inspections or a combination of both.

When the Service Agreement is renewed, the Tags will be included on the new Service Agreement that is created when it is renewed.

The screenshot shows the 'Edit Agreement - Hall, Sean' interface. The 'Maintenance Schedule' tab is active. A 'Tags' modal is open, showing a list of tags: 'Filters Included' and 'Fenced in yard'. A red dot next to the 'Tag' hyperlink in the table indicates that there are tags associated with the inspection.

Confirmation	WO #	Problem Code	Est. Time	Equipment	Schedule date	Next Date	Non Billable	Billable	Amount(\$)
		Insp 1	0.00	AC001	11/22/2021	04/22/2022	11/22/2021	11/22/2021	150.00
		Insp 1		AC001			11/22/2021	11/22/2021	150.00

Red Dot next to Tag Hyperlink indicates that there are tags associated with the inspection.

The screenshot shows the 'Update Workorder - WO-4927' interface. The 'Tags' field is highlighted, showing a list of tags: 'Fenced in yard' and 'Filters Included'. A callout box explains that tags from the Maintenance Schedule are automatically added to the Inspection Work Order when it is created.

Tags from Maintenance Schedule automatically added to Inspection Work Order when it is created.

Tags on Accepted Quotes can now be deleted

You can now delete Tags off of an Accepted Quote. This will allow you to remove tags after you accept the quote so that they will no longer be included when you run various Quote Reports filtered by specific tags. For example, you might have a tag of “System is Down” that you added to a quote to signify the importance and priority of the quote. After the quote has been accepted, you should delete the tag so that it does not appear on Quote Reports if you filter by “System is Down”.

The screenshot shows the 'Accepted' quote form. A red box highlights the 'Accepted' status at the top. A red arrow points from this box to a callout box that says 'Click the "X" on a Tag to delete it off of an "Accepted" quote'. Another blue arrow points from the callout box to the 'X' icon on the 'System is Down' tag in the 'Tags' section. The 'Tags' section shows two tags: 'Approved Credit' and 'System is Down'. Below the tags is a 'Mobile' section with a checkmark icon. At the bottom is a 'Quote Items' table with columns: Item, Description, Qty, Rate (\$), Amount (\$), Tax, Equipment, Class, and Print. The table contains two items: MOT005 (3/4 hp 1075 RPM Cond Mtr) and CAP005 (12 5 Mfd Capacitor).

Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
MOT005	3/4 hp 1075 RPM Cond Mtr	1.00	287.93	287.93	YES		Residential-Service	YES
CAP005	12 5 Mfd Capacitor	1.00	40.00	40.00	YES		Residential-Service	YES

You can now hide Inactive Equipment from the Customer's Equipment Listing Screen

A new “Hide Inactive” slider has been added to the Customer Equipment Screen. This will allow you to suppress the Inactive Equipment from being displayed in the screen.

The screenshot shows the 'Equipment' listing screen. A red box highlights the 'Equipment' tab in the top navigation bar. A red arrow points from this box to a callout box that says 'Use this slider to Display or Suppress Inactive Equipment'. Another blue arrow points from the callout box to the 'Hide Inactive' slider, which is currently set to 'YES'. The 'Equipment' section shows a table with columns: Equip. Id, Equip. Type, Brand, Model Year, Model #, Serial #, Install Date, Labor Wty., Parts Wty., and Status. The table contains five items: AC 200, AC100, GD 100, DIS, and WH001. The 'Status' column shows 'Active' for all items. At the bottom is a pagination bar showing 'Showing 1 - 5 of 5'.

Equip. Id	Equip. Type	Brand	Model Year	Model #	Serial #	Install Date	Labor Wty.	Parts Wty.	Status
AC 200	AC	Trane	2009	4TTR4060A					Active
AC100	AC	Trane	2014	4TTR6060J	6573936				Active
GD 100	Disposers	InSinkErator	2019	BADGER5	68749887				Active
DIS	Disposers	InSinkErator	2018	BADGER5	75256				Active
WH001	Water Heater - Tank	Bradford White	2015	RG250T6N	594930459	03/01/2020	03/01/2020		Active

A Weather Widget has been added to the system and will automatically appear when you access the Dispatch Board

A new Weather Widget has been added to the system. When you access the Dispatch Board, it will appear at the top of the Board. If you are not on the Dispatch Board and you want to view the weather widget, you can click the “Weather” icon in the Header Menu from any screen. If you service multiple cities, you can define multiple Weather Locations in the Company Master Settings and when you click the Weather Icon, you can choose the city for which you want to display the weather. Also if you service multiple cities, you can define the default Weather Location for each employee in the Employee File and the system will default to that location for the particular employee when they access the Dispatch Board.

NOTE – You will need to define your Weather Location(s) in the “Preferred Weather Locations” field of the Master Settings Screen. If you do not see your city listed in that field, please contact a ServiceFactor Support Technician and they can add your location.

Preferred Weather Locations

Dallas ✕ Plano ✕ Fort myers ✕ Austin ✕

Click the "X" to close the Weather Widget if necessary

Click this icon to open the Weather Widget from any screen within ServiceFactor.

Weather Widget - Clicking on the widget will display the forecasted weather for the next 24 hours.

FORT MYERS
WEATHER

77°F
overcast clouds

humidity: 77%

wind: 15mph

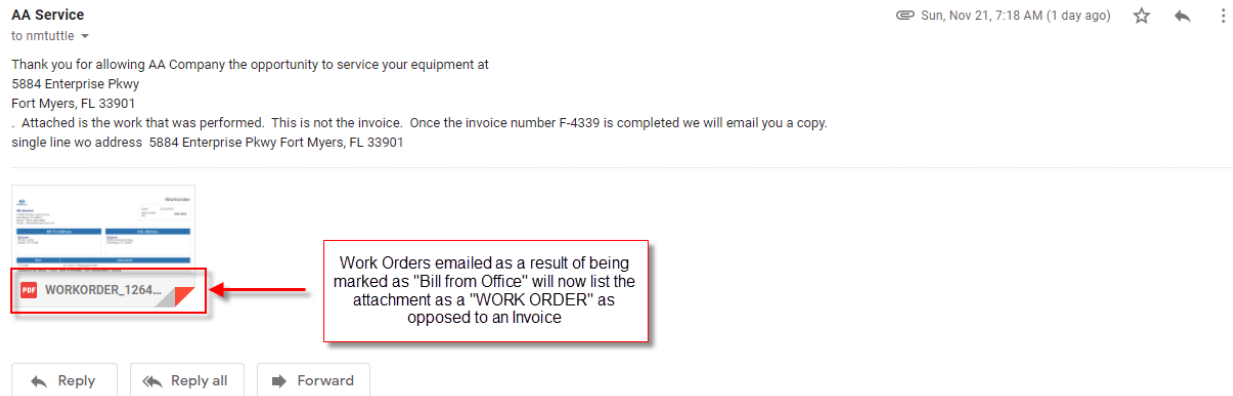
cloud cover: 90%

Next 24 hours

13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00	00:00	01:00
77°F	77°F	77°F	77°F	75°F	73°F	70°F	70°F	68°F	68°F	68°F	68°F	66°F

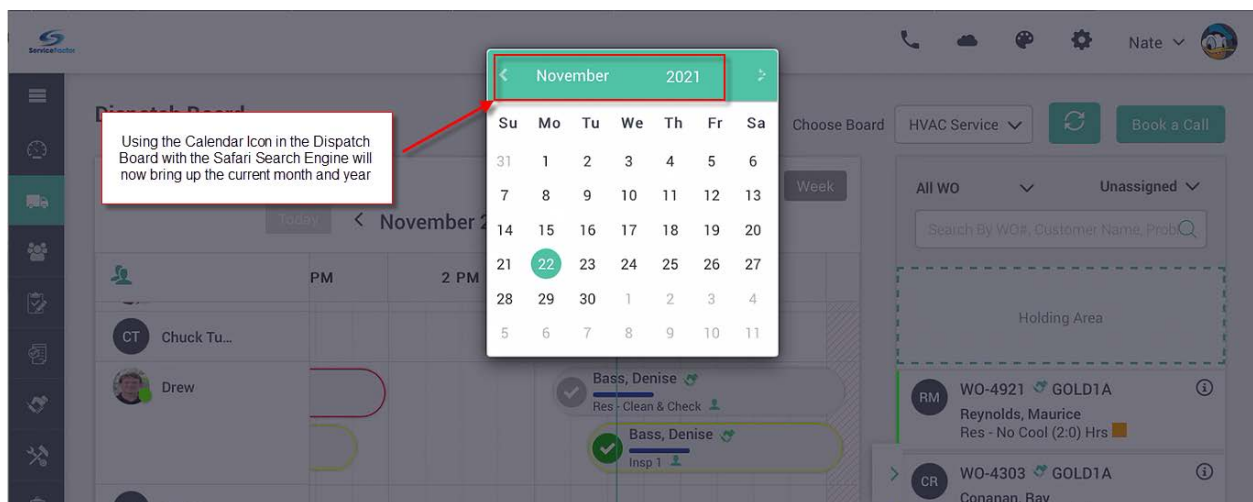
Work Orders Emailed from ServiceFactor Mobile will now list the attachment as a “Work Order” as opposed to an Invoice

If you have a customer set to “Bill from Office” or you select the option “Bill from Office” in ServiceFactor Mobile, the email that gets sent will now list the attachment as a “work order” and will use a new “Bill from Office” Communication Template for the email text that gets sent to the customer. This will allow you to use different email text for the Work Order that gets sent than the Invoice Text and the attachment will better reflect what is attached, eliminating confusion for your customers.



Calendar Issue on Dispatch Board when using Safari for your Search Engine has been corrected

An issue with the Calendar in the Dispatch Board displaying the year 1960 if using Safari for your search engine has been corrected. Now if you are using Safari and you click on the Calendar Icon from the Dispatch Board, the current month and year will be displayed in the calendar. This was most notably observed when using an iPad to access the office version of ServiceFactor.



The ability to issue a “Partial Refund” has been added when issuing a refund to an invoice that was paid via Credit Card Processing

If you made a payment via a credit card, you can now issue a partial refund against the payment. Prior to this release, if you issued a refund against a credit card that was processed, the system would only allow you to refund the entire amount. Now when issuing a refund to a Credit Card, the system will ask you the amount you would like to refund. The refund to the Credit Card will be processed and added to QuickBooks as a “check” issued to the customer to relieve the money from your bank account. When you issue a refund, the system will show an open balance for the amount of the refund on the invoice for which you issued the refund. You will need to issue a credit for the remaining balance and apply the credit to the invoice if you do not plan on collecting the refunded amount. The amount refunded against a payment will show in the “Refunded” column of the Payments screen.

NOTE – This option is only available if you have credit card processing enabled in ServiceFactor and you received the initial payment via a Credit Card that was processed in ServiceFactor. This feature also requires you to define the Bank Account you want the refunds issued from and the offsetting Accounts Receivable account in the Master Settings screen.

Default Check Accounts (For refunds) ⓘ

Bank Account	Receivable Account
Checking	Accounts Receivable (A/R)

Payment (Invoice No - F-4337) Print Export

Paid/Last Paid 11/22/2021	Total Invoice \$589.00	Amount Paid \$589.00	Remaining Balance \$0.00
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Type	Date	Reference	Card Brand	Amount	Action	Refunded
Card Swipe	11/22/2021	CC#9130 Auth.MC8900	MasterCard	\$589.00	Refund	

Click the Refund Button and enter the amount of the Refund you want to issue.

Refund

Enter Refund Amount

25.00

Cancel Submit

Payment (Invoice No - F-4337) Print Export

Paid/Last Paid 11/22/2021	Total Invoice \$589.00	Amount Paid \$564.00	Remaining Balance \$25.00
------------------------------	---------------------------	-------------------------	------------------------------

Type	Date	Reference	Card Brand	Amount	Action	Refunded
Card Swipe	11/22/2021		MasterCard	\$589.00	Refund	\$25.00

--Select Payment Type--

The Amount Paid will be reduced and the Remaining Balance will be adjusted based on the amount of the Refund which will be displayed in the "Refunded" field

Invoice Balances can be synced with QuickBooks Online in the Customer Invoice Screen

A new “Sync Balance” button has been added to the Customer Details Invoice Tab that will allow you to sync any payments that were added in QuickBooks Online to ServiceFactor. Prior to this feature, you would have to go to each invoice in ServiceFactor that was paid in QuickBooks Online and click the Payment Screen. This button will sync all the payments made to all invoices for the selected customer at once, as opposed to having to bring up each individual invoice.

NOTE – It is highly recommended that you add payments to ServiceFactor and let it feed to QuickBooks, as opposed to making payments in QuickBooks, which will eliminate the need for this feature. If you do make payments in QuickBooks, this feature will make it easier to sync the payments. The reason that you might make a payment in QuickBooks Online as opposed to ServiceFactor is if you receive one check for multiple invoices. In this case, you would make the payment in QuickBooks and then bring up the Customer in ServiceFactor, go to the Invoice Tab and click the “Sync Balance”.

The screenshot displays the ServiceFactor interface for a customer named Reynolds, Maurice. The top navigation bar includes tabs for Timeline, Work Orders, Equipment, Agreements, Invoice, Quotes, and Job. The Invoice tab is selected, showing a total invoice of \$3,119.93 and a balance of \$1,367.20. A red box highlights the 'Sync Balance' button in the top right corner. A callout box points to the 'Sync Balance' button with the text: 'Choose the Invoice Tab in the Customer Details Center and click the Sync Balance button to sync the payments added in QuickBooks Online with ServiceFactor'. Below the navigation bar, a table lists invoices with columns for Source, Invoice #, Invoice Date, Due Date, and Amount. The table shows several invoices, including those from QB and SF, with their respective dates and amounts.

Source	Invoice #	Invoice Date	Due Date	Inv	Amount	WO	Save	Action
QB	A-295	07/01/2019	07/01/2019					
SF	F-4337	11/21/2021	11/21/2021	\$589.00	\$25.00	WO-4920		
SF	F-4338	11/21/2021	11/21/2021	\$454.79	\$454.79	WO-4921	✓	
SF	A-634	11/01/2019	11/01/2019	\$25.00	\$25.00	WO-722	✓	
SF	A-508	10/01/2019	10/01/2019	\$25.00	\$25.00	WO-578	✓	
SF	A-413	09/01/2019	09/01/2019	\$25.00	\$25.00	WO-466	✓	
SF	A-909	01/01/2020	01/01/2020	\$25.00	\$25.00	WO-1040	✓	
SF	A-735	12/01/2019	12/01/2019	\$25.00	\$25.00	WO-834	✓	
SF	A-295	07/01/2019	07/01/2019	\$25.00	\$25.00	WO-326	✓	
SF	F-209	05/10/2019	05/10/2019	\$101.25	\$101.25	WO-223	✓	
SF	A-260	06/01/2019	06/01/2019	\$25.00	\$25.00	WO-275	✓	
SF	A-1675	05/01/2020	05/01/2020	\$25.00	\$25.00	WO-1943	✓	

Communication Template – A new “Work Order Address Single Line” code has been added to the Insert Codes

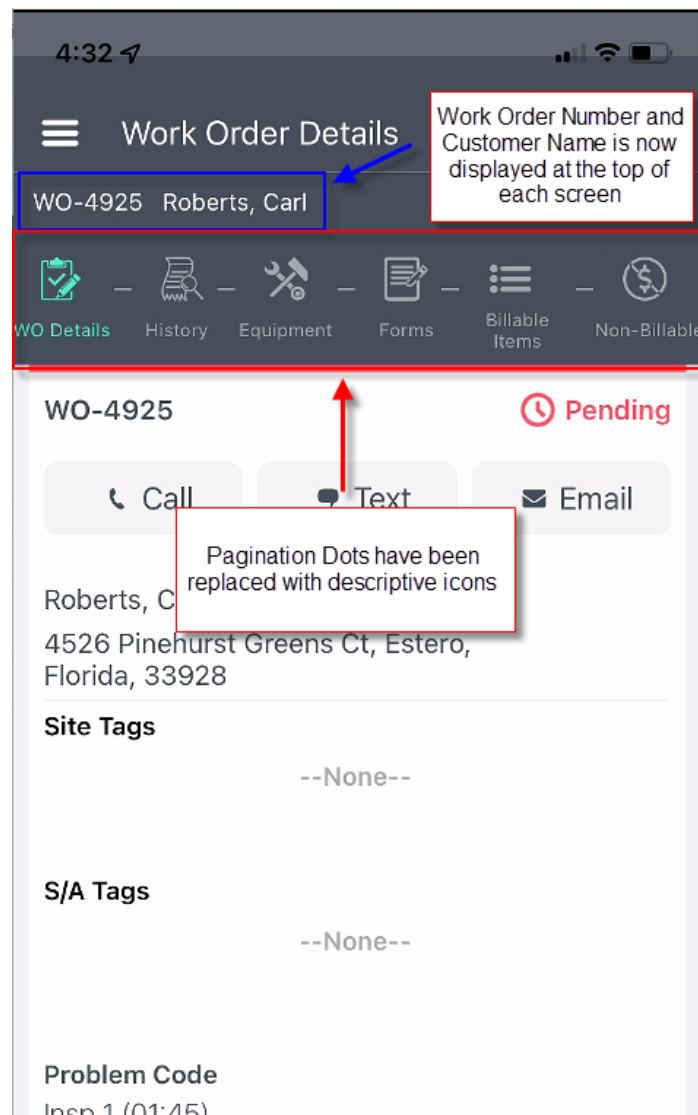
A new Insert Code called “Work Order Address Single Line” has been added that will allow you to include the Customer address as a Single Line item as opposed to a multiple line address. The original option of “Work Order Address” will print the address on multiple lines. Be sure to review your Communication Templates to determine if you need to make any adjustments to how the address will print.

ServiceFactor Mobile has been revamped to make it more intuitive

ServiceFactor Mobile has several significant changes with this update. The first thing you will notice is that the screens now show icons for the various screens, as opposed to dots. This will make it more intuitive for users to realize that they can tap on an icon to access the screen as opposed to thinking that they have to slide back and forth to access screens. The ability to access any screen by tapping on the appropriate dot has always been available, but it was not very intuitive.

To move from screen to screen, you can simply tap any of the icons at the top of the work order and you will instantly be taken to the appropriate screen. In addition to icons being added to replace the previous pagination dots, you can still slide left or right to move from screen to screen.

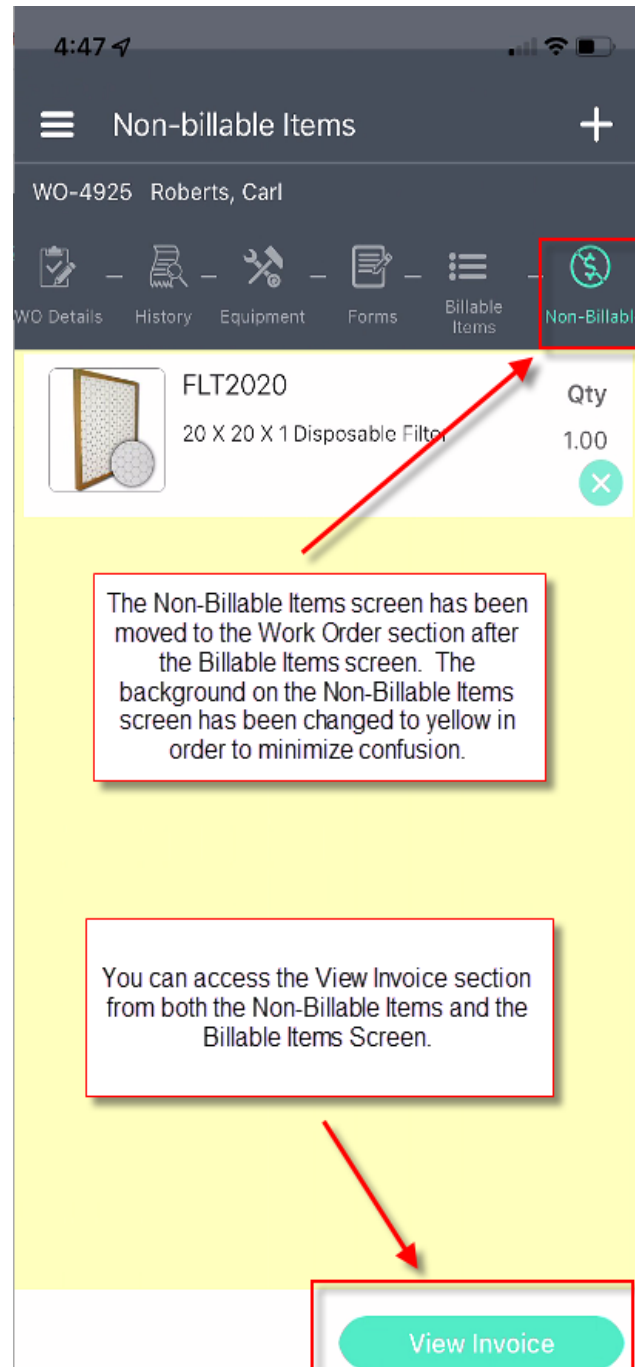
In addition to the dots being changed to Icons, the Work Order number and the Customer's Name is now displayed at the top of all screens.



ServiceFactor Mobile – Non-Billable Items screen has been moved to after the Billable Items screen in the Work Order section

The Non-Billable Items screen has been moved from the “View Invoice” section to the Work Order section of SF Mobile. This will make it easier for technicians to access and view Non-Billable items without having to drill into the View Invoice section. You can now access the “View Invoice” option from both the Billable Items and Non-Billable Items screens.

Helpful Tip – This change will allow technicians to quickly and easily view any Non-Billable Items associated with an Inspection Work Order without having to drill into the View Invoice section.



Service Factor Mobile - The Work Approval Section has been removed from the View Invoice Section and will be accessed from the Items Screen independent of the View Invoice section

The Work Approval is now its own section in ServiceFactor Mobile and can be accessed from the Billable Items screen. This will streamline the Invoice Process for companies that do not require work approval. The Approve Work section now consists of 2 screens, the "Preview" screen, which allows you to change the order of the items on the invoice, change the tax region if applicable and will also allow you to hide the Service Agreement Savings text from being displayed on the approval and printing on the invoice. The Approval screen is where the customer can sign off on the recommended work.

The left screenshot shows the 'Billable Items' screen. At the bottom, the 'Approve Work' button is highlighted with a red box. A red arrow points from this button to the 'Approve Work' button on the right screenshot. A text box on the left screenshot says: 'Click the Approve Work button on the Billable Items screen to access the Work Approval screen'.

The right screenshot shows the 'Approve Work' screen. At the top, a back arrow is highlighted with a red box. A text box says: 'Tap the Back Arrow to return to the Billable Items Screen'. Below the back arrow, the 'Preview' and 'Approval' buttons are highlighted with a red box. A text box says: 'Approve Work section has 2 options, Preview and Approval.'.

The right screenshot also displays the following information:

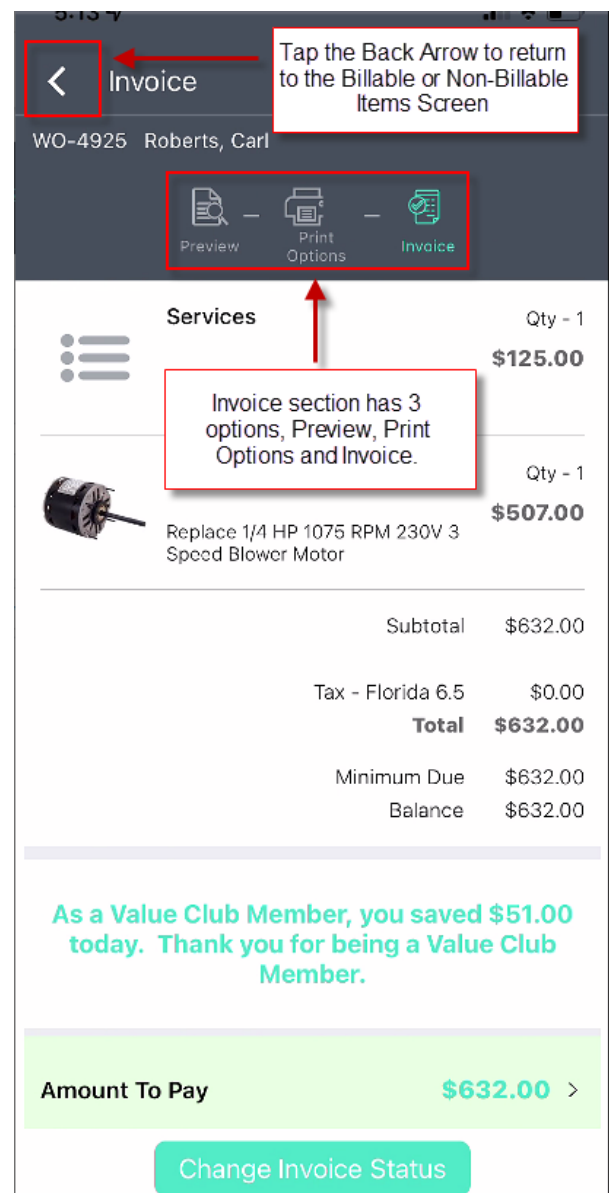
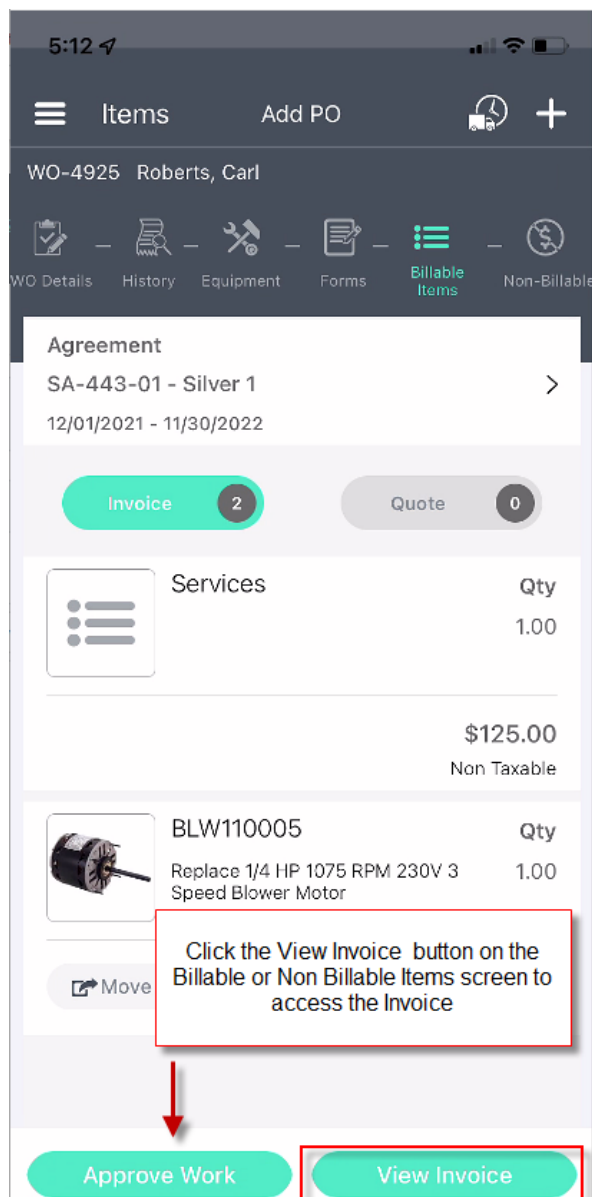
Services	Qty - 1	
		\$125.00
Replace 1/4 HP 1075 RPM 230V 3 Speed Blower Motor	Qty - 1	\$507.00
Subtotal		\$632.00
Tax - Florida 6.5		\$0.00
Total		\$632.00
Minimum Due		\$632.00
Balance		\$632.00

As a Value Club Member, you saved \$51.00 today. Thank you for being a Value Club Member.

Approval Text ▼
I have the authority to order the above work and do...

ServiceFactor Mobile – The Invoice Section has been separated from the Work Approval Section and can be accessed from the Billable and Non-Billable Items screens

The View Invoice Option will no longer include the Work Approval screen, streamlining the invoice process. When you access the View Invoice section, it will consist of 3 screens, the “Preview” screen, which allows you to change the order of the items on the invoice and change the tax region if applicable, a new “Print Options” screen, which will allow to select if you want to Print the Savings Description on the Invoice, Print the Equipment Details on the Invoice and a new feature allowing the customer to pay their bill online (if applicable), and the Invoice Screen where you can capture the customer’s signature, collect payment and email the invoice.



ServiceFactor Mobile – A new “Print Options” screen has been added to the View Invoice Section

A new screen has been added to the “View Invoice” section that will allow you to choose what you want to include on the printed or e-mailed invoice. To choose an option, turn the slider on (green) or off (gray) and the option will be included or not included on the Invoice. You access the View Invoice section by clicking the “View Invoice” button on the Billable or Non-Billable Items Screens.

Print Savings Text – Choose this option if you want any Service Agreement Savings, or Potential Savings, to print on the invoice and to be displayed on the Invoice screen where the customer can sign off accepting the work performed.

Print Equipment – Choose this option if you want the Equipment Details to print on the invoice. This option will group all items under each piece of Equipment to which it has been assigned on the Items Selection screen.

Allow to pay bill online – Turn this slider on if you want the customer to be able to pay their invoice online. If you are collecting COD, you will not need to activate this option. If you are not going to collect COD, this option will add a link to the Invoice Email that gets sent to the customer that will allow the customer to click on it and pay their Invoice online. NOTE – If you do not see the “Allow to pay bill online” option in the Print Options screen, it means the feature has not been activated in your system. Contact ServiceFactor Support for information and to activate this feature.

