

SF Release Notes: January 31, 2022

When creating a Work Order from Quotes, Missed Inspections, Inspections or Project Management, you can now enter “Problem Reported” Notes during Work Order creation

When you create a work order from a Quote, Missed Inspection, Manually generated Inspection or Project Management, the “Notes” field has been added to the Work Order creation pop-up so that you can quickly add any important notes and details to the Work Order. Prior to this release, you would have to edit the Work Order after it was created and enter any notes. The Notes will appear in the “Problem Reported” section of the Work Order.

Create Work Order for Quote 590

Problem Code * Priority

Lead Source *

Notes

Enter Notes Here

Unassigned Schedule

Update Workorder - WO-5213

Save

SD
Dave, Stauble
5852 Inverness Circle, Fort Myers, Florida, 33903
(238) 707-0243 dave@mail.com

Work Order Invoice

Additional Information Tags History

Payment Status
Overdue \$ 4,778.39 Open \$ 5,267.39

Site Tags
None

Agreement
SA-534 - Gold 1 Annual
Jan 2022 Jan 2023
Full Coverage

Name / Description Mobile Phone Email

Problem Code * Class Estimated Time Priority

Lead Source * Service Agreement * Business Entity Quote Number

Zone Color Tags

Problem Reported

Site Notes

Notes added during Work Order Creation will appear in the Problem Reported Section

Markup Field has been added to the Work Order Screen

If you charge a different markup on material depending on the type of work you are performing, you can now change the Markup Table on the Work Order, which will flow through to the invoice and use the selected markup whether adding items in the office or in the field. Prior to this release, you would have to go to the Invoice screen change the markup there after you saved the Work Order.

Create Workorder [Save] [Schedule]

User Profile: Jones, Riley
11770 Rosemount Drive, Fort Myers, Florida, 33913
(239) 707-0243 | nmtuttle@earthlink.net

Work Order Details:
 Name / Description: Riley | Mobile: (239) 707-0243 | Phone: | Email: nmtuttle@earthlink.net
 Problem Code: Res - No Cool | Class: Residential | Estimated Time: 02:00 | Priority: Standard
 Lead Source: Existing Customer | Service Agreement: SA-189 - GOLD1M | Business Entity: Res HVAC Service | Quote Number: Enter Quote Number
 Zone: Gateway | Color: Orange | Tags: Beware of Dog
 Problem Reported: System is not blowing any air and is making a strange noise from the ODU
 Site Notes:
 Sales Person: Search and select | Change Bill To: Jones, Riley | PO Number: Enter PO Number | **Markup: Standard - 110**

You Now Have the Ability to Display the “Problem Reported” in the Body of the Invoice


A new feature has been added to the system that will allow you to define an “Item” that when selected on an invoice, it will pull over the person that reported the problem, the Problem Code and the Problem Reported details to the Description field on the invoice. The Qty Field, Price and Amount columns will be blank for the Problem Reported data.

	Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print	
		SF Prob Reported	Contact Name: Riley Issue Reported: Res - No Cool System is not blowing any air and is making a strange noise from the ODU			0.00	NO		Residential	YES	
Search and select											

You now have the Ability to Display the “Technician’s Dispatch Details” in the Body of the Invoice

A new feature has been added to the System that will allow you to define an “Item” that when selected on an invoice, it will bring over the Technician’s Time details from the Timesheet screen to the Description field on the Invoice. The information it will display is the Work Date, Time Type, Start Time, End Time and Technician Name. The Qty Field, Price and Amount columns will be blank for the Technician Detail data.

☰	SF Tech Time	Date	Time Type	Start Time	End Time	Tech	NO	Residential ▾	YES <input checked="" type="radio"/>	🗑️
		01/28/2022	Traveling	03:05 PM	03:23 PM	Drew				
		01/28/2022	Working	03:13 PM	05:00 PM	Drew				



AA Service
11928 Fairway Lakes Drive,
Fort Myers, FL 33013
(817) 881-3949
sales@teamservice.com

Invoice

Invoice Date: **01/28/2022**
Invoice No: **F-4613**
Due Date: **01/28/2022**
Sales Rep:
Customer PO:
Work Order No. **WO-5239**

Bill To Address

Riley Jones
11770 Rosemount Drive,
Fort Myers, FL 33913

Site Address

Riley Jones
11770 Rosemount Drive,
Fort Myers, FL 33913

Description	Qty	Price (\$)	Amount (\$)															
Contact Name: Riley Issue Reported: Res - No Cool System is not blowing any air and is making a strange noise from the ODU																		
<table border="1"> <tr> <td>Date</td> <td>Time Type</td> <td>Start Time</td> <td>End Time</td> <td>Tech</td> </tr> <tr> <td>01/28/2022</td> <td>Traveling</td> <td>03:05 PM</td> <td>03:23 PM</td> <td>Drew</td> </tr> <tr> <td>01/28/2022</td> <td>Working</td> <td>03:13 PM</td> <td>05:00 PM</td> <td>Drew</td> </tr> </table>	Date	Time Type	Start Time	End Time	Tech	01/28/2022	Traveling	03:05 PM	03:23 PM	Drew	01/28/2022	Working	03:13 PM	05:00 PM	Drew			
Date	Time Type	Start Time	End Time	Tech														
01/28/2022	Traveling	03:05 PM	03:23 PM	Drew														
01/28/2022	Working	03:13 PM	05:00 PM	Drew														
Regular Time Labor @ \$150 per hour	2.10	135.00	283.50															
1/3 hp 1075 RPM 230V Cond Mtr	1.00	188.42	188.42															
5 MFD Capacitor	1.00	26.50	26.50															
Sub Total			\$498.42															
As a Value Club Member, you saved \$55.38 today. Thank you for being a Value Club Member.		Tax (6.5000 %)	\$13.97															
		Total	\$512.39															

Message

LIMITED WARRANTY: All materials, parts, and equipment are warranted by the manufacturers' or suppliers' written warranty only. All labor performed by the above-named company is warranted for 30 days or as otherwise indicated in writing. The above-named company makes no other warranties, express or implied, and its agents or technicians are not authorized to make any such warranties on behalf of the above-named company.

An “Easy Edit/View” Popup has been added to the Description field in the Invoice Screen

You will notice a new icon in the Description field on invoices. Clicking this icon will open an “Edit Description” box that display the description of the field selected and allow you to edit the data. This will make it faster and easier to view or edit long descriptions on an invoice in ServiceFactor. If you only want to view the data, use the “Cancel” button or “X” at the top of the popup to close the screen. If you made an edit and want to save it, use the Save button to save any changes

SF Prob Reported - Edit Description

Contact Name: Riley
Issue Reported: Res - No Cool
System is not blowing any air and is making a strange noise from the ODU

Cancel Save

Invoice # F-4613 Customer PO # Sales Rep Markup Standard - 110 Class Residential

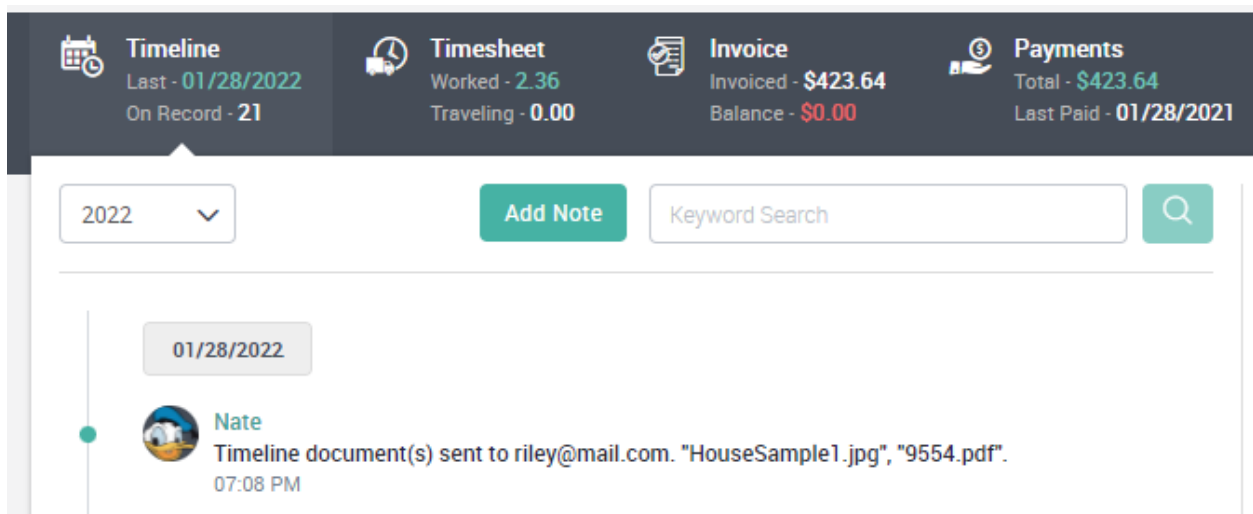
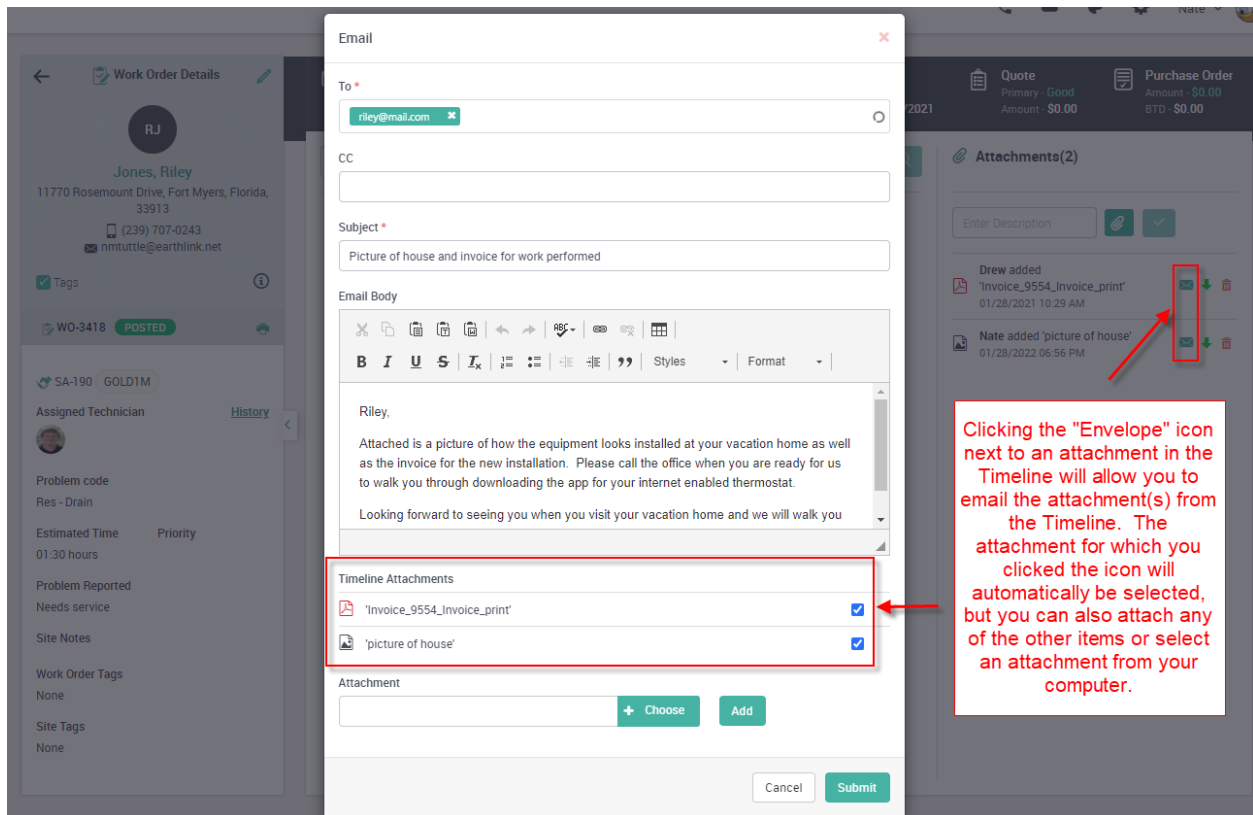
Business Entity Res HVAC Service Use Tax NO Use Tax Search and select Print Savings YES Print Equipment YES

Location	Item	Description	Qty	Rate (/h)	Amount	Tax	Equipment	Class	Print
	SF Prob Reported	Contact	1.00						YES
	SF Tech Time	Date Time Type Start Time End Time Tech 01/28/2022 Traveling 03:05 PM 0	1.00						YES

Clicking this icon in the Description field of the Invoice will open the "Edit Description" screen. This will allow you to easily view a long description or easily edit a description.

The Ability to Email Documents and Images from Timelines Has Been Added to the System

A “Mail” icon will now appear next to any attachments in a Timeline. Clicking the Mail icon will open an email window and allow you to email any of the attachments from the timeline. You can also attach documents from your hard drive to the email. Each time you send an email from the Timeline, a Timeline entry will be created indicating the date, time and who sent the email as well as the email recipient and the name(s) of the documents sent.



The Agreements Tab Now Allows you to View the Service Agreement Details and Edit if Necessary

A new “View Agreement” button has been added to the “Agreements” tab in the Customer Detail Center. Prior to this version, there was an “Edit” button that would allow you to access the Service Agreement, but it would put you in the Edit Mode. Now you can View the Agreement and if you want to edit the agreement, you can choose to Edit the Agreement while viewing it. This will allow you to easily view current and past agreements without having to go to the Agreements Menu and searching for the expired agreement.

Customer Details

Timeline
Last: 01/28/2022
On Record: 105

Work Orders
Open: 6
Completed: 11

Equipment
Total: 2

Agreements
Active: 2
Total: 2

Invoice
Invoiced: \$6,471.50
Balance: \$487.00

Quotes
Total: 3

Agreements

Gold 1 Monthly - SA-189
11/11/2021 - 11/10/2022

Gold 1 Monthly - SA-190
11/11/2021 - 11/10/2023

Inspection Schedule

Confirmation

Inspection Date

Time

Status

Schedule

Renew

View Agreement

Select the Appropriate Agreement and click the View Agreement button to drill down into the agreement

View Agreement - Jones, Riley

Renew

Edit

General

Billing Schedule

Maintenance Schedule

Agreement Number *

SA-189

Agreement Plan *

Gold 1 Monthly

Active

Items

PMA 1 Monthly

Problem Code

Insp 1

Class

Residential

Reference Id

Reference Id

Tags

Agreement Period

Recurring

Auto Renewal

Original Start Date *

11/11/2019

Contract Start Date *

11/11/2021

Renewal Date *

11/10/2022

Renewal Price Type

Current Price

Contract Price

Other Informations

Lead Source *

Existing Customer

Customer PO #

Eg: SA-1234

Taxable

Tax Group *

Florida 6.5

Change Bill To

Jones, Riley

Click the Back Button to return to the Agreements Tab in the Customer Detail Center

Click the Edit Button if you want to Edit the Agreement. Otherwise click the various tabs in order to view the details of the Agreement

A Reference ID Field Has Been Added to the Agreement

A new Reference ID field has been added to the Agreement that will allow you to enter your own internal Service Agreement ID. If your company uses pre-numbered Service Agreement forms, you can use this field in order to track your internal agreement ID. The Reference ID has been added as a new column to the Agreements Listing screen, which will also be queried based on the Search Field.

NOTE – The Reference ID will NOT be carried over to “Renewed” Service Agreements. This field is used for companies that may be regulated by the State Insurance Commission and consider full service agreements as an “Insurance Policy”. In this situation, each renewed Service Agreement would require a new number.

Edit Agreement - Jones, Riley [Cancel] [Save]

Jones, Riley
11770 Rosemount Drive, Fort Myers, Florida, 33913
nmtuttle@earthlink.net

General | Billing Schedule | Maintenance Schedule

Agreement Number * SA-189 Agreement Plan * Gold 1 Monthly ☒ Active

Items PMA 1 Monthly Problem Code Insp 1 Class Residential

Reference Id ⓘ QZ-756332 Tags Use Reference ID field to enter your own Service Agreement Number

Agreement Period ☒ Recurring ☐ Auto Renewal

Original Start Date * Contract Start Date * Renewal Date *

Agreements (1) Filters Applied: qz [Clear All] [Print] [Export]

All Agreements | Active | Recently Expired | Expired | Needs Attention | Missed Inspections

Number	Reference Id	Customer Name	Info	Plan	Start Date	Expiry Date	Renewal Date	Status	Actions
SA-189	QZ-756332	Jones, Riley	ⓘ	Gold 1 Monthly	11/11/2021		11/10/2022	Active	View

15 Showing 1 of 1

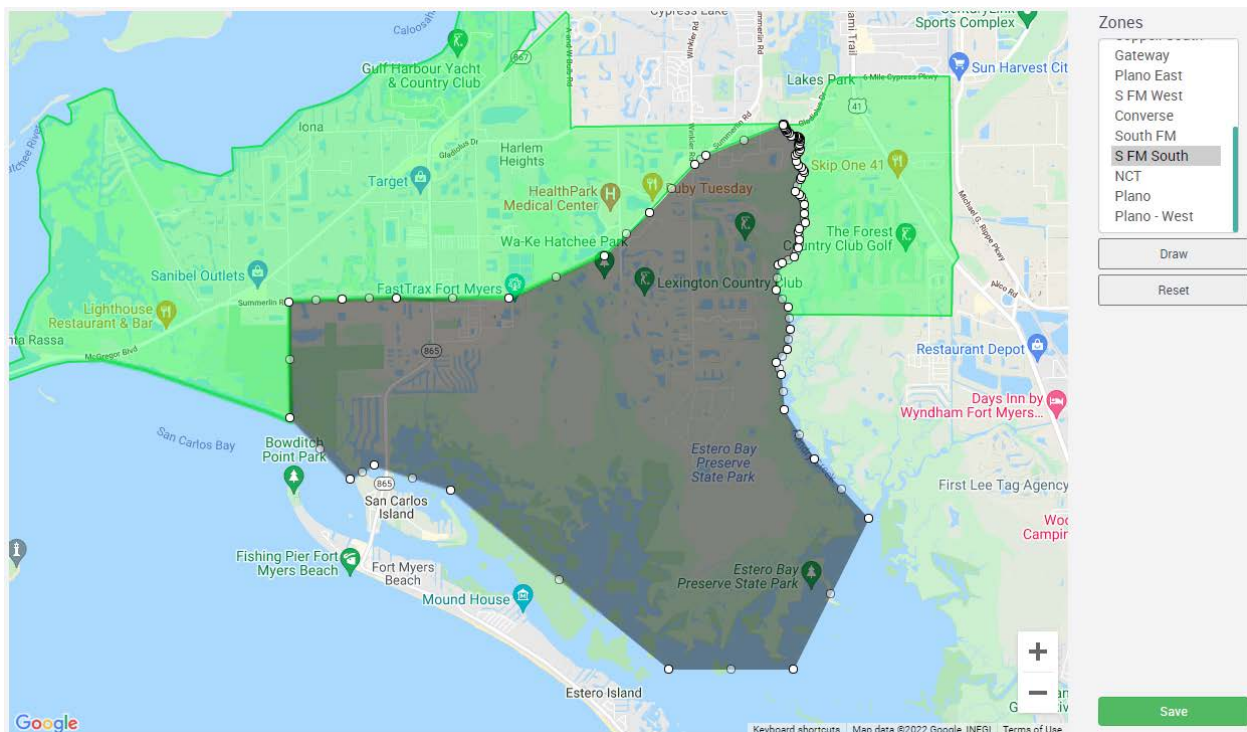
Reference ID Column has been added to the Agreements Listing Screen

Zones Can Now be Defined on a Map Which Will Update the Customers Zone Based on the Customer's Address

A new feature has been added that will allow you to define your Zones based on a map. Once you have created a zone, you can draw the area you want associated to that zone on a map. Anytime you access a customer that is located within the boundaries of the zone on the map, the system will automatically update their zone. This feature will allow you to better define your zones. Prior to this release, zones were defined by a zip code or manually selecting a zone. Often times, a zip code may cover a large area, or be on both sides of a river, etc. By defining the zone based on a map, you can better control your zones and better manage your schedule.

NOTE – With this update, customer's zones will automatically be updated based on the zone assigned in the map, or by the Zip Code assigned to the Zone any time you save the customer record or add a new work order in the system. If you are manually assigning zones, you need to make sure that you do not have any zones assigned to a map or a zip code. The zone will be assigned based on the Map first, and if the area is not defined, then it will be assigned based on the Zip Code. If you do not have the zip code assigned to a zone, you will be able to manually enter a zone. *Even if you manually change a zone on a customer record, the system will overwrite it based on the Map or Zip if defined.*

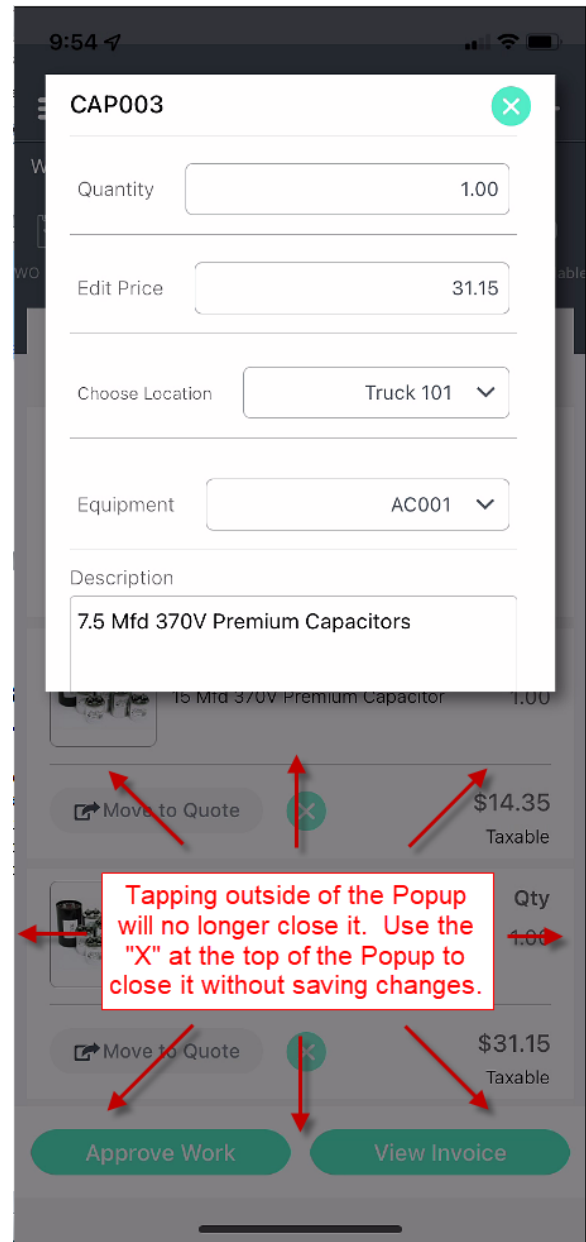
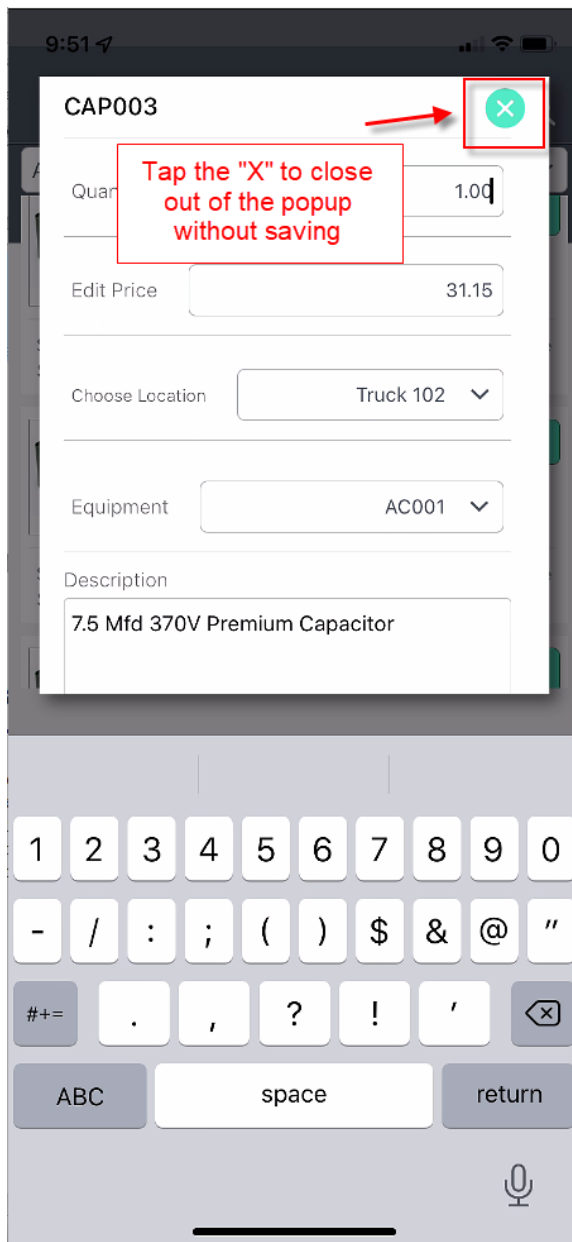
NOTE 2 – The zone upgrade is in preparation for an exciting new feature that is coming soon to ServiceFactor that will allow your customers to schedule service calls or inspections online. More details will be coming soon about this great new feature and time saver!



ServiceFactor Mobile – Tapping Outside of the Item Popup Will No Longer Close the Screen

ServiceFactor Mobile has been updated so that if you want to close out of the Items Popup, you need to use the “X” at the top of the screen as opposed to tapping outside of the popup. Some customers were having problems of accidentally tapping outside of the popup and closing the screen without saving the changes they made. This will eliminate the accidental closing of the screen.

NOTE – If using an iPad, this update will no longer clear the notes if you change the rotation of the device.



ServiceFactor Mobile - You Now Have the Ability to Display the “Problem Reported” in the Body of the Invoice

If the office has defined a “Problem Reported Item”, you can use that item to pull over the Problem Reported details that will display the person that reported the problem, the Problem Code and the Problem Reported text to the Description field on the invoice. The Qty Field, Price and Amount columns will be blank for the Problem Reported data.

ServiceFactor Mobile - You now have the Ability to Display the “Technician’s Dispatch Details” in the Body of the Invoice

If the office has defined a “Technician’s Dispatch Detail Item”, you can use that item to pull over the Dispatch Details that will display the Technician’s Time details from the Timesheet screen to the Description field on the Invoice. The information that will be displayed is the Work Date, Time Type, Start Time, End Time and Technician’s Name. The Qty Field, Price and Amount columns will be blank for the Technician Detail data.

NOTE – When viewing the Technician’s Time Detail on a small screen (iPhone or Android Phone), the time detail for a single time type (Traveling or Working) will be display on multiple lines, but will print on a single line on the printed or emailed invoice.

10:14

Items Add PO

WO-5239 Jones, Riley

WO Details History Equipment Forms Billable Items Non-Billable

Agreement
SA-189 - Gold 1 Monthly
11/11/2021

Invoice 5 Quote 0

SF Prob Reported Qty
Contact Name: Riley 1.00
Issue Reported: Res - No Cool
System is not blowing any air and is
making a strange noise from the ODU

Move to Quote \$0.00
Non Taxable

SF Tech Time Qty
Date Time Type Start Time 1.00
End Time Tech
01/28/2022 Traveling 03:05 PM
03:23 PM Drew
01/28/2022 Working 03:13 PM
05:00 PM Drew

**AA Service**

11928 Fairway Lakes Drive,
Fort Myers, FL 33013
(817) 881-3949
sales@teamservice.com

Invoice

Invoice Date: **01/28/2022**
Invoice No: **F-4613**
Due Date: **01/28/2022**
Sales Rep:
Customer PO:
Work Order No. **WO-5239**

Bill To Address

Riley Jones
11770 Rosemount Drive,
Fort Myers, FL 33913

Site Address

Riley Jones
11770 Rosemount Drive,
Fort Myers, FL 33913

Description					Qty	Price (\$)	Amount (\$)
Contact Name: Riley Issue Reported: Res - No Cool System is not blowing any air and is making a strange noise from the ODU							
Date	Time Type	Start Time	End Time	Tech			
01/28/2022	Traveling	03:05 PM	03:23 PM	Drew			
01/28/2022	Working	03:13 PM	05:00 PM	Drew			
Regular Time Labor @ \$150 per hour					2.10	135.00	283.50
1/3 hp 1075 RPM 230V Cond Mtr					1.00	188.42	188.42
5 MFD Capacitor					1.00	26.50	26.50

Problem Reported
Details

Technician Dispatch
Details

As a Value Club Member, you saved \$55.38 today. Thank you for being a Value Club Member.

Sub Total **\$498.42**
Tax (6.5000 %) **\$13.97**
Total **\$512.39**

Message

LIMITED WARRANTY: All materials, parts, and equipment are warranted by the manufacturers' or suppliers' written warranty only. All labor performed by the above-named company is warranted for 30 days or as otherwise indicated in writing. The above-named company makes no other warranties, express or implied, and its agents or technicians are not authorized to make any such warranties on behalf of the above-named company.

Description					Qty	Price (\$)	Amount (\$)
Contact Name: Riley Issue Reported: Res - No Cool System is not blowing any air and is making a strange noise from the ODU							
Date	Time Type	Start Time	End Time	Tech			
01/28/2022	Traveling	03:05 PM	03:23 PM	Drew			
01/28/2022	Working	03:13 PM	05:00 PM	Drew			
Regular Time Labor @ \$150 per hour					2.10	135.00	283.50
1/3 hp 1075 RPM 230V C					1.00	188.42	188.42
5 MFD Capacitor					1.00	26.50	26.50

Qty, Price and Amount fields
will be blank when printing the
Problem Reported and
Dispatch Details on an invoice

As a Value Club Member,
Member.

Sub Total **\$498.42**
Tax (6.5000 %) **\$13.97**
Total **\$512.39**

Message

ServiceFactor Mobile – Improvements Have Been Made for Poor Internet Connection

A new feature has been added to SF Mobile that will set a minimum internet speed limit. When SF Mobile initiates a sync back to the office, the current speed will be checked and if is equal to or higher than the speed limit defined, the system will proceed with the sync. If the speed is lower than the minimum speed limit, the sync will be canceled and the data will be saved in the “offline mode”. Once the speed has exceeded the limit, you will be able to sync the data. This change should eliminate the screen from just spinning until you get an acceptable signal.

NOTE – The system has been set by default to a speed that should be acceptable for syncing data, however you can adjust the speed on each device if you find that the minimum speed needs to be increased or decreased based your experience and location. If you are not in an area that has internet speed issues, you should not need to adjust this value. If you are in a mountainous or rural area, you may need to experiment with what speed works best for you. The adjustment can be found in the “Settings” Menu on each individual device.

