

# SF Release Notes: June 20, 2022

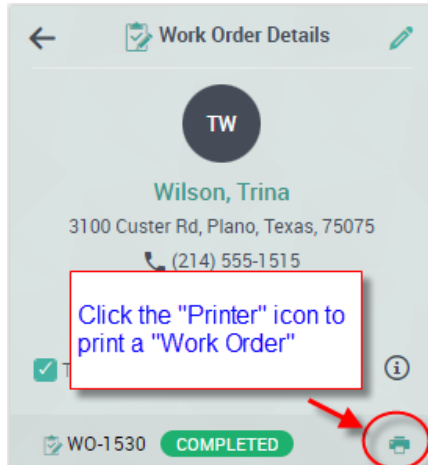
## Service Agreement Billing and Maintenance Timetables have been enhanced.

The Timetables for setting up the Billing Schedule and Maintenance Inspection schedule have been enhanced to display all 12 months of a service agreement on one screen. Prior to this release, if you had a service agreement that started in the middle of the year, the timetable only showed the months for the current year and you had to click a drop down for the remaining months in the following year. In addition to being able to see all 12 months of the service agreement, timetables now also include the ability to “Select All” or “Clear All” months with the simple click of a button. This will make it easier for setting up agreements that span 2 calendar years and selecting months for agreements that will be billed monthly or have inspections performed monthly.

The screenshot displays the 'Set Timetable' interface. At the top, there's a title bar with a close button (X). Below the title, there are two input fields: 'Choose Day' with a value of '1' and 'Choose Year' with a dropdown menu showing '2022 - 2023'. To the right of these fields, a blue callout box contains the text: 'Use these buttons to select or clear all months of the Service Agreement'. An arrow points from this box to a green-bordered box containing two buttons: 'Select All' and 'Clear All'. Below these fields, the timeline is displayed for two years. The year 2022 is shown with months JAN, FEB, MAR, APR, MAY, JUN (highlighted with a green border), JUL, AUG, SEP, OCT, NOV, DEC. The year 2023 is shown with months JAN (highlighted with a green border), FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, DEC. At the bottom right, there is a green 'Save' button. A blue callout box at the bottom center contains the text: 'Timeline screen now displays 2 calendar years at a time.'


## Printing a Work Order will now include the “Message to be displayed” field from the Invoice Screen

If you print the Work Order format of the Invoice, it will now include the “Message to be displayed” text from the Invoice Screen on the printed Work Order.



### Message to be displayed

Please note the office will be closed on Thanksgiving and the day after Thanksgiving this year, but we will still be running service calls if you need service.

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

**Workorder**  
Date 06/17/2022  
Work Order No. **WO-1530**

Bill To Address	Site Address
<b>Trina Wilson</b> 3100 Custer Rd, Plano, TX 75075	<b>Trina Wilson</b> 3100 Custer Rd, Plano, TX 75075

Item	Description
BRK003	2 P 50A Plug-in Breaker
MOT003	1/3 hp 1075 RPM 230V Cond Mtr
CAP005	12.5 Mfd Capacitor
MOT005	3/4 hp 1075 RPM Cond Mtr
FLX004	8" R6 Flex Duct per ft
PO - Part	OEM Control Board
FLT2020	20 X 20 X 1 Disposable Filter
CAP002	5 MFD Capacitor
MOT004	Condenser Motor - 1 Year Parts & Labor Warranty

**Message**  
Please note the office will be closed on Thanksgiving and the day after Thanksgiving this year, but we will still be running service calls if you need service.

LIMITED WARRANTY: All materials, parts, and equipment are warranted by the manufacturers' or suppliers' written warranty only. All labor

## Invoices – A new “Hide Prices” Option has been added to the Invoice Screen.

A new slider has been added to the Invoice screen that will allow you to hide the sell prices of each individual line item on the invoice. If you enable this slider, the invoice will print the description and quantity of each item, but the prices will not be listed. The only price will be total sell price at the bottom of the invoice.

The screenshot shows the ServiceFactor mobile app interface. On the left is a sidebar with user information for Trina Wilson and a list of work orders. The main area displays the 'Invoice' screen. At the top, there's a navigation bar with icons for Timeline, Timesheet, Invoice, Payments, Quote, and Purchase Order. Below this, the 'Invoice' section contains various fields: Bill To (Wilson, Trina), Bill To Address (3100 Custer Rd, Plano, Texas, 75075), Terms (Due on receipt), Invoice Date (03/29/2022), Due Date (03/29/2022), Invoice # (F-1411), Customer PO #, Sales Rep, Markup (Standard), Business Entity (Res HVAC Service), Use Tax (NO), Call Back (NO), Original Work Order, Print Savings (NO), Print Equipment (YES), and a new 'Hide Prices' slider set to YES. A red circle highlights the 'Hide Prices' slider, and a red arrow points to it with the text 'New "Hide Prices" Slider'.

The screenshot shows a printed invoice from ServiceFactor. The header includes the company logo and contact information for AA Service. The invoice details are as follows:

Invoice	
Invoice Date:	03/29/2022
Invoice No:	F-1411
Due Date:	03/29/2022
Sales Rep:	
Customer PO:	
Work Order No.	WO-1530

Bill To Address	Site Address
<b>Trina Wilson</b> 3100 Custer Rd, Plano, TX 75075	<b>Trina Wilson</b> 3100 Custer Rd, Plano, TX 75075

Description	Qty
2 P 50A Plug-in Breaker	1.00
1/3 hp 1075 RPM 230V Cond Mtr	1.00
12.5 Mfd Capacitor	1.00
3/4 hp 1075 RPM Cond Mtr	2.00
8" R6 Flex Duct per ft	25.00
OEM Control Board	1.00
20 X 20 X 1 Disposable Filter	2.00
5 MFD Capacitor	1.00
Condenser Motor - 1 Year Parts & Labor Warranty	1.00

Sub Total	\$1,702.01
Tax ( 8.2500 % )	\$139.43
Total	\$1,841.44

Individual prices are not listed, but the Invoice Total is listed at the bottom of the invoice.

## Quotes - A new “Hide Prices” Option has been added to the Quotes Screen.

A new slider has been added to the Quotes Screen that will allow you to hide the sell prices of each individual line item on the Quote. If you enable this slider, the Quote will print the description and quantity of each item, but the prices will not be listed. The only price will be the total sell price at the bottom of the Quote. This makes it easier to present the customer with an “As Agreed” price.

Quote Only

MA

Lawhons

9941 Bayshore Rd, Nort Fort Myers, Florida, 33917

(239) 555-9823 (239) 707-0243

nmtuttle@earthlink.net

COMPLETED

Problem code

Quote

Lead Source

Existing Customer

Service Agreement

SA-592

Timeline

Last: 06/16/2022

On Record - 3

Quote

Primary - Better

Amount - \$8,029.47

Quote Pending

Email Print Save

Bill To

Lawhons

Bill To Address

9941 Bayshore Rd, Nort Fort Myers, Florida, 33917

(239) 707-0243

Quote Date

06/16/2022

Expiration Date

07/16/2022

Follow-up Date

06/16/2022

Quote #

648

Business Entity

Installation

Sales Rep

Nate

Lead Source

Existing Customer

PO #

Class

Installation

Markup

Commercial

Problem Code

Search and Select

Tags

Hide Prices

YES

Good Better Best +

ServiceFactor

AA Service

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

Quotation

Date: 06/16/2022

Quote No: 648

Exp Date: 07/16/2022

Sales Rep: Nate

Bill To Address

Lawhons

9941 Bayshore Rd,  
Nort Fort Myers, FL 33917

Site Address

Lawhons

9941 Bayshore Rd,  
Nort Fort Myers, FL 33917

GOOD (Pending)

Description	Qty
Regular Time Labor	8.00
4TTR6024J - Trane XR-16 24000 BTUH Central A/C - The XR16 home air conditioning system has a SEER rating of up to 17.00, making it an excellent choice for home comfort and for earning energy-efficiency tax credits.	1.00
Increased efficiency may substantially lower your home cooling costs. Materials for all central air conditioning systems are tested again and again for long-lasting performance and durability.	1.00
TEM8A0B24 - M Series Communicating Air Handler - The M Series Communicating air handlers combine affordability and flexibility to work with the complete range of Trane heating and cooling products. So you get the reliability of Trane and the options to work within your specific system and budget.	1.00
50 Feet of 3/8" LL x 7/8" SL x 3/8" Insulated Line Set	2.00
Installation of 36" x 48" 3" Ultralite Condensing Unit Pad	1.00

Individual prices are not listed, but the Quote Total is listed at the bottom of the Quote.

Sub Total \$7,879.96

Tax ( 6.5000 % ) \$0.00

Total \$7,879.96

## Quotes – A Profitability Details Button has been added to the Quotes

A Profitability Details Button has been added to the quotes, which will allow you to see the overall estimated profitability of the quote, as well as the estimated costs and sell prices of each item on the quote and the subtotal of Material/Other Items and Labor Items. This is similar to the Profitability Details option in the Invoice Screen.

Good Better Best +

Each quote tab has its own profitability details

Quote Items

Profitability Details Pending

Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
	Regular Time Labor							

Profitability Details

Invoice Amount	Material Cost	Labor Cost	=	Estimated Profit	Estimated Gross Margin
\$7,879.96	\$2,611.50	\$180.00		\$5,088.46	64.57%

Material Costs/Other Costs

Item	Description	Qty	Cost(\$)	Extended Cost(\$)	Rate(\$)	Amount(\$)
Lineset3878	50 Feet of 3/8" LL x 7/8" SL x 3/8" Insulated Line Set	2.00	228.75	457.50	450.0000	900.0000
4TTR6024J	4TTR6024J - Trane XR-16 24000 BTUH Central A/C - The XR16 home air conditioning system has a SEER rating of up to 17.00, making it an excellent choice for home comfort and for earning energy-efficiency tax credits. Increased efficiency may substantially lower your home cooling costs. Materials for all central air conditioning systems are tested again and again for long-lasting performance and durability.	1.00	1359.00	1359.00	3200.0000	3200.0000
TEM8A0B24	TEM8A0B24 - M Series Communicating Air Handler - The M Series Communicating air handlers combine affordability and flexibility to work with the complete range of Trane heating and cooling products. So you get the reliability of Trane and the options to work within your specific system and budget.	1.00	795.00	795.00	2400.0000	2400.0000
PAD110045	Installation of 36" x 48" 3" Ultralite Condensing Unit Pad	1.00	0.00	0.00	259.96	259.96
Sub Total(\$)				2,611.50		6,759.96

Labor Costs

Item	Description	Labor Type	Qty	Cost(\$)	Extended Cost(\$)	Rate(\$)	Amount(\$)
RT Labor 125	Regular Time Labor		8.00	22.50	180.00	121.2500	970.0000
PAD110045	Installation of 36" x 48" 3" Ultralite Condensing Unit Pad		1.00	0.00	0.00	150.00	150.00
Sub Total(\$)					180.00		1,120.00

## Subtotal Items – Subtotal Item Types now have an option to “Hide Prices Above Subtotal”

A new “Hide Prices Above Subtotal” slider has been added to “Subtotal” item types. If you enable this slider for a Subtotal item, any items above the Subtotal line will not print the price on the invoice or quote and only the Subtotal price will print. This will allow you to list several items and only display the subtotal price as opposed to each line items price along with the Subtotal.

**NOTE** – Each Subtotal Item is independent of other Subtotal Items. For example, if you enter a Subtotal item on an Invoice or Quote that does not have the “Hide Prices Above Subtotal” slider enabled, the items above that Subtotal will print the sell prices. If you add more items below the previous Subtotal and enter another Subtotal that has the “Hide Prices Above Subtotal” slider enabled, the items above the new Subtotal, but after the previous Subtotal Item will NOT print the prices for each item.

<

View Item - subtotal

Item Information

Type

Subtotal

Item Name/Number \*

Material Subtotal

Sales informations

Description

Material Subtotal

Hide Prices Above Subtotal? ☒

If you enable this option, the items above the Subtotal Item on an invoice or quote will not print the individual items sell price and will only print the Subtotal price. NOTE - If you have multiple subtotals on an invoice, the item will hide the prices above the current subtotal, but after the previous subtotal. Each subtotal item will be independant of the other subtotal items.

Invoice

Email Print Save

	Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print	
≡		TT Labor	Travel Time Labor	0.50	100.00	50.00	<input type="checkbox"/> NO		Residential:Maintenance	<input checked="" type="checkbox"/> YES	🗑
≡		RT Labor 125	Regular Time Labor @ \$125 per hour	1.75	106.25	185.94	<input type="checkbox"/> NO		Residential:Maintenance	<input checked="" type="checkbox"/> YES	🗑
≡		Labor Subtotal	Labor Subtotal	1.00	0.00	235.94					
≡	Truck 102	MOT0025	Condenser Motor - 1/3 to 1/6 HP 208-230/1/60 (1075 rpm/1 speed)	1.00	185.83	185.83	<input type="checkbox"/> NO		Residential:Maintenance	<input checked="" type="checkbox"/> YES	🗑
≡	Truck 102	CAP005	12.5 Mfd Capacitor	1.00	34.00	34.00	<input checked="" type="checkbox"/> YES		Residential:Maintenance	<input checked="" type="checkbox"/> YES	🗑
≡	Truck 102	FLT2020	20 X 20 X 1 Disposable Filter	2.00	5.10	10.20	<input type="checkbox"/> NO		Residential:Maintenance	<input checked="" type="checkbox"/> YES	🗑
≡		Material Subtotal	Material Subtotal	1.00	0.00	230.03					

This subtotal item does NOT have the "Hide Prices Above Subtotal" slider enabled, therefore the prices for items above this subtotal will be displayed on the printed Invoice or Quote.

This subtotal item DOES have the "Hide Prices Above Subtotal" slider enabled, therefore the prices for items above this subtotal (but after the prior subtotal) will NOT be displayed on the printed Invoice or Quote.

**AA Service**

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

**Invoice**

Invoice Date: **06/17/2022**  
Invoice No: **A-5274**  
Due Date: **06/17/2022**  
Sales Rep:  
Customer PO:  
Work Order No. **WO-5996**

**Bill To Address**

**Stauble Dave**  
5852 Inverness Circle,  
Fort Myers, FL 33903

**Site Address**

**Stauble Dave**  
5852 Inverness Circle,  
Fort Myers, FL 33903

Description	Qty	Price (\$)	Amount (\$)
Regular Time Labor @ \$125 per hour	1.75	106.25	185.94
Travel Time Labor	0.50	100.00	50.00
Labor Subtotal			235.94
20 X 20 X 1 Disposable Filter	2.00		
12.5 Mfd Capacitor	1.00		
Condenser Motor - 1/3 to 1/6 HP 208-230/1/60 (1075 rpm/1 speed)	1.00		
Material Subtotal			230.03

This Subtotal does NOT have the "Hide Prices Above Subtotal" enabled

This Subtotal DOES have the "Hide Prices Above Subtotal" enabled

As a Value Club Member, you saved \$73.40 today. Thank you for being a Value Club Member.

Sub Total **\$465.97**  
Tax ( 6.0000 % ) **\$2.04**  
Total **\$468.01**

**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.

## Subtotal Items – Subtotal Items will no longer print a Quantity on the Invoice

When printing a Subtotal on an Invoice or Quote, the “Qty” and “Price” fields will now be blank on the Subtotal Line. Prior to this release it would print a 1 in the Qty field and the Subtotal amount in the Price field. Now it just prints the Subtotal in the “Amount” field making it easier to read.

Description	Qty	Price (\$)	Amount (\$)
Regular Time Labor @ \$125 per hour	1.75	106.25	185.94
Travel Time Labor	0.50	100.00	50.00
Labor Subtotal			235.94
20 X 20 X 1 Disposable Filter	2.00		
12.5 Mfd Capacitor	1.00		
Condenser Motor - 1/3 to 1/6 HP 208-230/1/60 (1075 rpm/1 speed)	1.00		
Material Subtotal			230.03

## Purchase Orders – You can now edit the “Notes” field when a Purchase Order is in a “Completed” status

The ability to edit the Notes field on a completed Purchase Order has been added. Many times there may be an issue with the items ordered, or information that needs to be noted after the items were received, but before the invoice is received, or an issue with the Vendor Invoice where you are going to receive a credit, or the customer needs to return an item, or an item was damaged, etc. By allowing the ability to edit the Notes Field after the PO has been completed, you can track information about the Purchase Order or invoice that comes in after you have received all of the items on the Purchase Order.

The screenshot shows the 'Purchase Order - PO-947' form. The 'Status' dropdown is set to 'Complete'. The 'Notes' field contains the text 'Waiting for a credit on the invoice.' A red box highlights the 'Notes' field and the 'Save Notes' button. A red arrow points from the 'Status' dropdown to the 'Notes' field. A red box with text points to the 'Notes' field: 'Enter any notes associated with the Purchase Order and click the "Save Notes" button after a PO is in a "Complete" Status.'

**Purchase Order - PO-947**

**Purchase Order** | Receiving Slip

Email | Print

Ordered By: Nate | Created On: 06/16/2022 | Last Date Changed: 06/16/2022 | Billed to Date: \$19.25

Purchase Order #: PO-947 | PO Date: 06/16/2022 | Expected Delivery Date: 06/16/2022 | Ship to: Don't Print | Status: Complete

PO Type: Service | Location / Job / Work Order: WO-6013 / Lawhons | Phase / Change Order: Search and select | Work Order: Search and select

Preferred Vendor: Johnstone Supply | Email: wmosborn@me.com | Markup: Commercial | Class: Commercial

Notes: Waiting for a credit on the invoice. | Save Notes

No Charge: NO | Mark PO as Void: NO | Use Cost from Item File for Markup?: NO

Item	Description	Order Qty	Total Received	Distributed Quantity	Rate	Amount	Unit Sell	Class
CAP005	12.5 Mfd Capacitor	1.00	1.00	0.00	19.2500	\$19.2500	40.00	Commercial

Total: \$19.25

Cancel | Save | Save & Receive

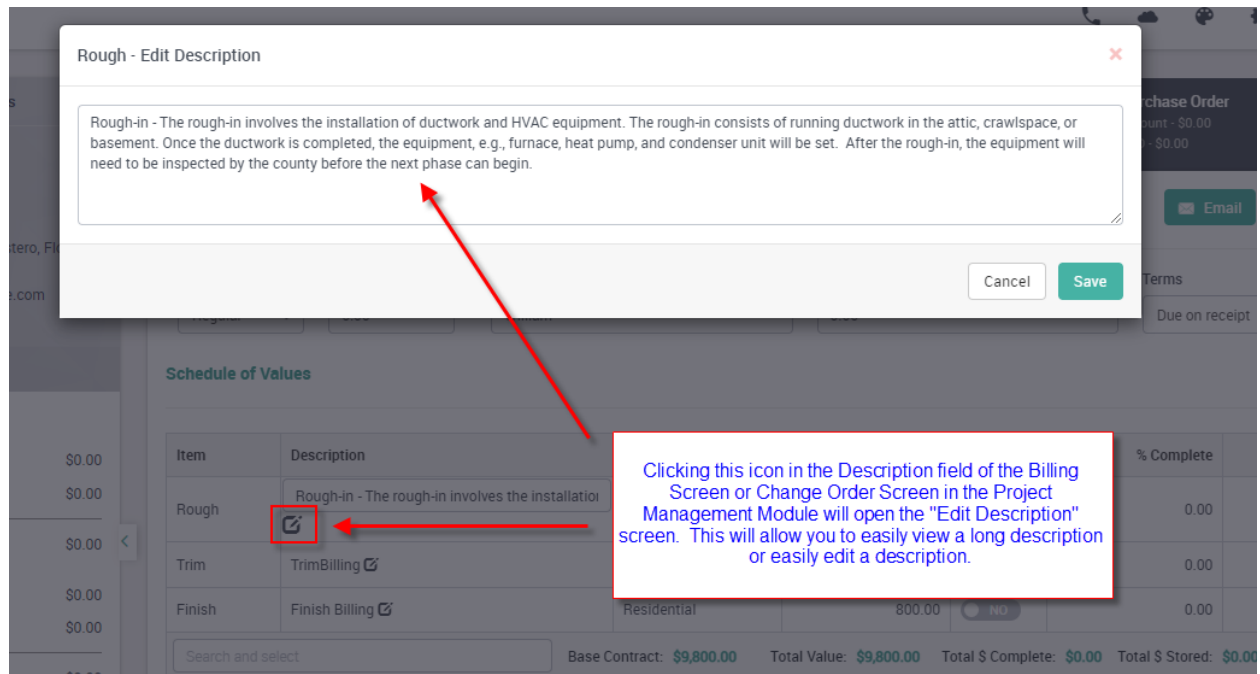
## Purchase Orders – When adding a Purchase Order against a Work Order generated from a Quote, the “No Charge” slider will now be defaulted to Yes.

The “No Charge” slider will automatically be set to “Yes” when adding a Purchase Order to a Work Order that was generated from a Quote. This should minimize the chance of changing the originally quoted price of the job by adding additional items to the job that may not have been on the quote. If you want to charge for the item being purchased, which ultimately will change the originally accepted price, be sure to change the “No Charge” slider on the Purchase Order to “No”.



## Project Management - The “Easy Edit/View” Popup has been added to the Description field in the Billing Screen

The “Edit/View” feature that was added to the Invoice and Quote screens in prior updates has been added to the Job Cost Billing Screen and Change Order screen. You will notice a new icon in the Description field on the Billing Screen and the Change Order screen. Clicking this icon will open an “Edit Description” box that displays the description of the field selected and allows you to edit the data. This will make it faster and easier to view or edit long descriptions in the Billing and Change Order screens. If you only want to view the data, use the “Cancel” button at the bottom of the screen or click the “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.



## Communication Template – A Communication Template has been added for emailing Project Management (Job) Invoices

A new Communication template has been added for Job Invoices. This will allow you to pre-define email body text along with “Insert Codes” that will automatically populate the Email Body when emailing an invoice.

Insert Codes

Use the following codes to customize your communication

<u>Customer Displayname</u>	<u>Customer Firstname</u>	<u>Customer Lastname</u>
<u>Customer Companyname</u>	<u>Customer Since</u>	<u>Workorder Address</u>
<u>Workorder Address Single Line</u>	<u>Billing Address</u>	<u>Customer Phone</u>
<u>Customer Email</u>	<u>Invoice Number</u>	<u>Job Number</u>
<u>Job PO Number</u>		<u>Job Name</u>

Email

To \*

john@email.com ✕

CC

Subject \*

Project Management Invoice

Email Body

✂️ 📄 🗑️ 📅 📎 ↩️ ➡️ ABC ✓ 🔒 🔗 📱

B I U S T<sub>x</sub> ¶ ☰ ⌵ ⌶ ” Styles Normal

Dear Bonnie,

Thank you for allowing AA Service Company to work on your project located at 432 Grenier Dr North Fort Myers, FL 33903 . Attached, please find invoice J-368 for the current job draw. If you provided a Purchase Order number for this job, the PO Number is: 5678.

body p

Attachment

+ Choose Add

Cancel Submit

A new Maintenance Invoice Communication Template has been added for emailing invoices with a status of “Maintenance” from ServiceFactor Mobile. This will allow you to use different text for Maintenance Invoices than regular Invoices.

AA Service Company - Maintenance Invoice ⌵ Inbox x

AA Service  
to nmtuttle ▾

Dear Randy,

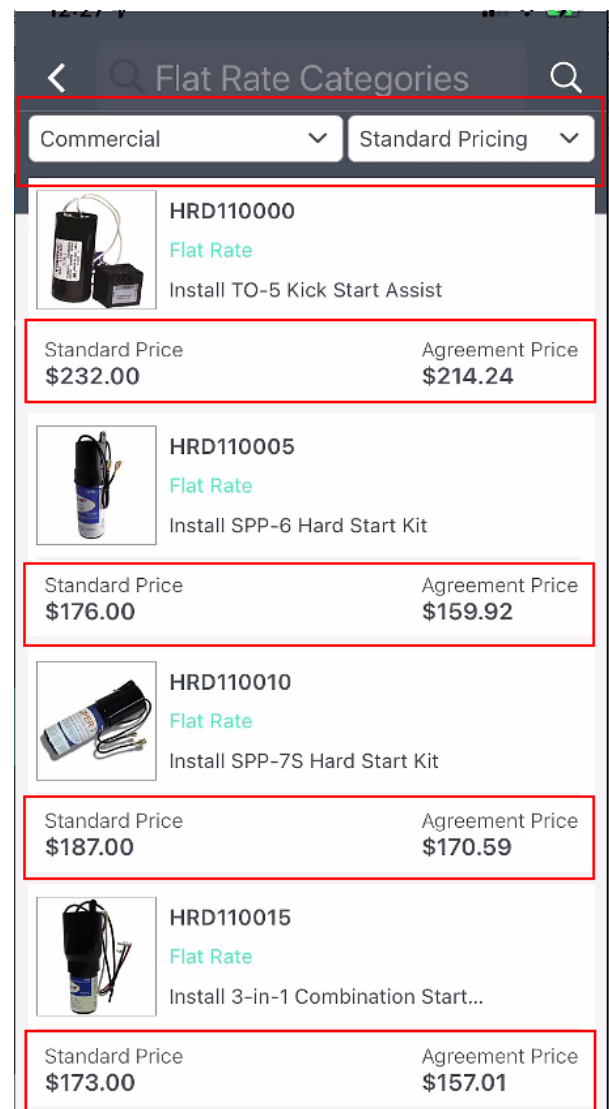
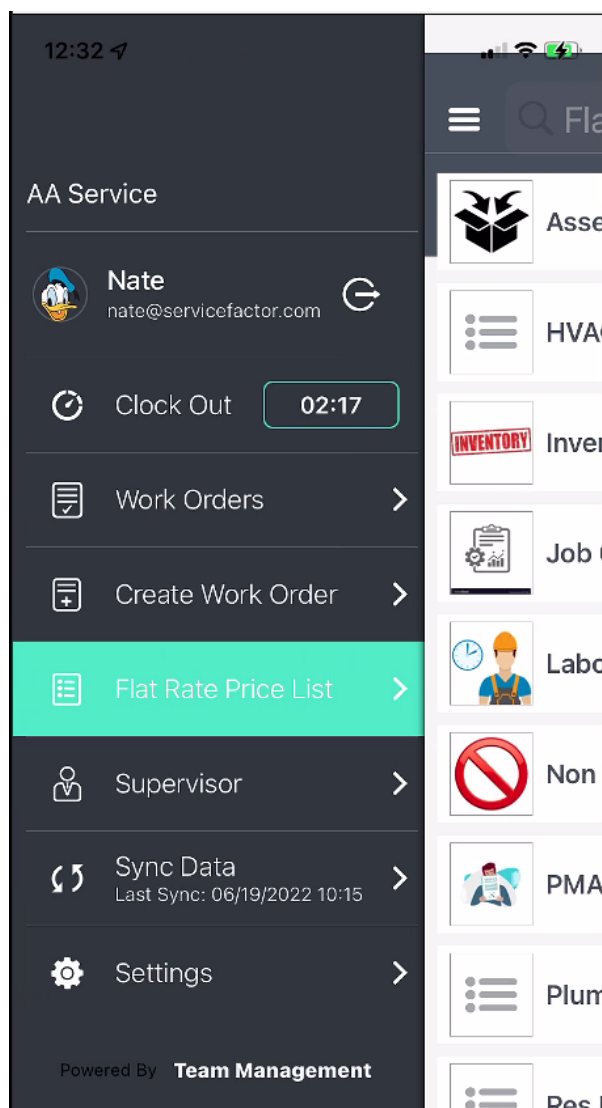
Thank you for allowing AA Service Company to perform your system maintenance. Attached, please find invoice F-5291 for work performed on Work Order WO-4895. We look forward to servicing your equipment during your next planned inspection.

AA Service Company



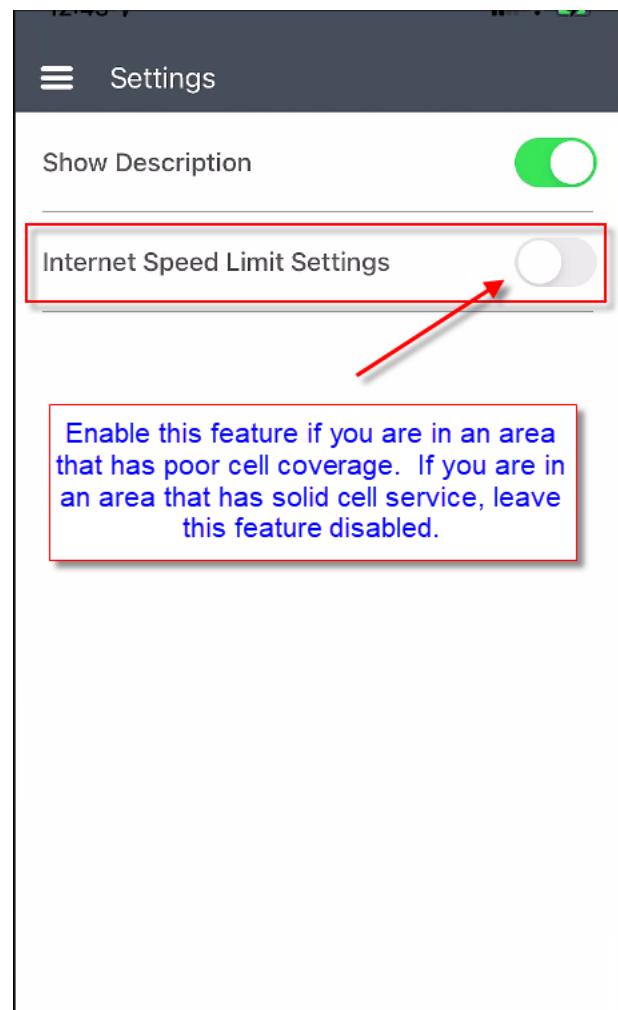
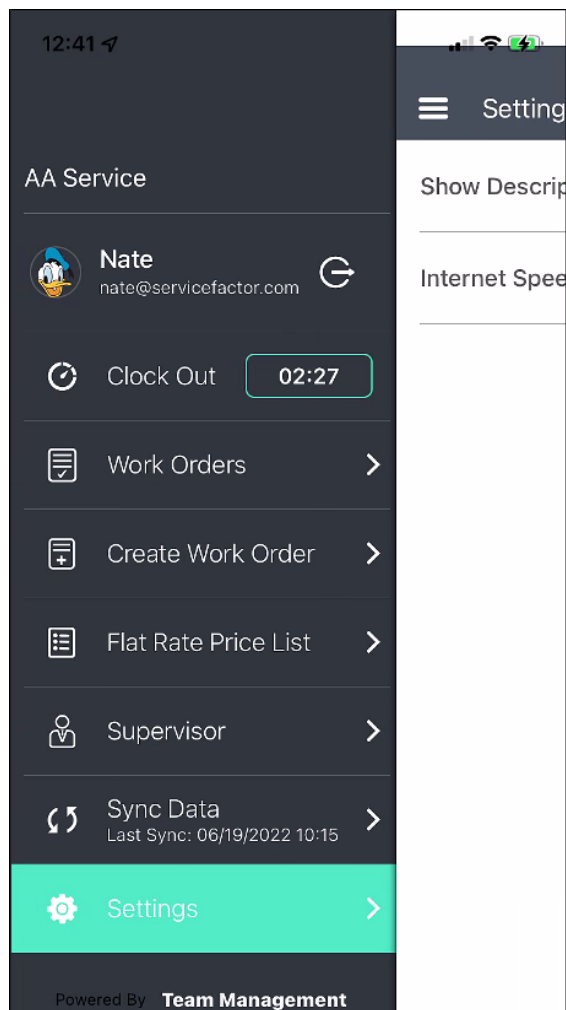
## ServiceFactor Mobile – Flat Rate Price Book can now be viewed from the Menu

A new option has been added to ServiceFactor Mobile that will allow you to look up Flat Rate prices without having to open a Work Order. The prices will displayed will default to standard pricing along with your default service agreement discount, but you can use drop down fields to change the prices displayed to be based on Premium Pricing (after hours pricing) as well as based on a particular Service Agreement. For example, if you offer a 10% discount for your standard service agreements and a 15% for a premium service agreement, you can choose the particular service agreement type from the drop down and the correct prices will be displayed. This feature minimize the need for a printed price book.



## SF Mobile – You now have an option to turn off the Internet Speed Limit Settings

You now have the option to turn off the Internet Speed Limit settings if you are in an area that has a consistent and strong cell connection. In a previous release, a feature was added that would check the internet speed and if it fell below a specific threshold, the call would not be synced back to the office. This feature in some instances would cause the system to not sync the calls back to the office, even though you had adequate connection speed. With this release, we allow you to turn off the speed checking, which will eliminate the issue. **NOTE** – If you are in an area of the country that has poor connectivity, such as a mountainous area, we recommend that you enable the setting and choose the lowest speed. If you are in an area that does not have poor connectivity, we recommend you disable the speed setting.



## Reports – A “Work Order Call Back Report” has been added

A new Call Back report has been added to the system under the “Work Order” reports. If you mark an Invoice as a Call Back in the Invoice Screen, this report will display the sell price, costs and gross profit of the original invoice as well as the call back invoice and give you net totals for both invoices. It will also show you the primary tech for both invoices and indicate if the same tech was used for the call back as the original call.

<

Call Back Report

Print

Export

Sunday, June 19, 2022												
Call Back Report												
1/1												
Type	WO #	Site Name	Primary Tech	Invoice Date	Labor Sell	Mat/Sub/ Other Sale	Labor Cost	Mat/Sub/ Other Cost	Gross Profit \$	Gross Profit %	Original WO #	Same Tech
Orig	<a href="#">WO-814</a>	Clooney, George	Brett	01/12/2020	0.00	306.68	0.00	2,609.05	-2,317.70	-795.50%		
CB	<a href="#">WO-5703</a>	Clooney, George		04/14/2022	12.99	0.00	0.00	0.00	12.99	100.00%	WO-814	<input type="checkbox"/>
					12.99	306.68	0.00	2,609.05	-2,304.71	-757.28%		
Orig	<a href="#">WO-4012</a>	O'Rourke, Lisa	Drew	06/14/2021	252.50	168.00	2.38	0.00	418.12	99.43%		
CB	<a href="#">WO-5677</a>	O'Rourke, Lisa		04/13/2022	150.00	0.00	0.00	0.00	150.00	100.00%	WO-4012	<input type="checkbox"/>
					402.50	168.00	2.38	0.00	568.12	99.58%		
Orig	<a href="#">WO-4249</a>	Smith, Randy	Drew	11/23/2021	131.25	231.32	0.68	34.16	327.73	90.39%		
CB	<a href="#">WO-5614</a>	Smith, Randy	Billy Bob	04/04/2022	0.00	36.00	1.76	18.58	15.66	43.50%	WO-4249	<input type="checkbox"/>
					131.25	267.32	2.44	52.74	343.39	86.16%		
Orig	<a href="#">WO-5123</a>	Jones, Riley	Brett		0.00	0.00	0.00	80.00	-80.00	0.00%		
CB	<a href="#">WO-5124</a>	Jones, Riley	Chuck Tuttle	01/05/2022	302.00	214.00	47.95	0.00	468.05	90.71%	WO-5123	<input type="checkbox"/>
					302.00	214.00	47.95	80.00	388.05	75.20%		
Orig	<a href="#">WO-5522</a>	Johnson, Issac	Nate	03/24/2022	0.00	5.40	0.60	3.55	1.25	23.15%		
CB	<a href="#">WO-5523</a>	Johnson, Issac	Nate	03/24/2022	0.00	113.23	2.10	48.59	62.54	55.23%	WO-5522	<input checked="" type="checkbox"/>
					0.00	118.63	2.70	52.14	63.79	53.77%		
Report Totals:					848.74	1,074.63	55.47	2,793.93	-941.36	-49.34%		

FILTER BY

Clear All

INVOICE DATES

clear

This Year-to Date

From \* To \*

01/01/2022 06/19/2022

Original Tech

Search and select

Call Back Tech

Search and select

ADDITIONAL SELECTIONS

SubTotal by

none

Go

## Reports - A Customer Portal Report has been added

A new Customer Portal Report has been added to the system under the Customer Reports option. This report will give you a list of all of your customers that have been set up to use the Customer Portal that was released in the last update, along with their login ID and if a password has been assigned. This is a great report to use for figuring out which customers have been set up to use the Customer Portal.

Customer Portal Report

Print

Export

Sunday, June 19, 2022						
Customer Portal Report						
1/1						
Site Name	Site Address	Customer Zone	Recovery Email	Unique Code	Login	PW Assigned
<a href="#">Bass, Denise</a>	404 Greenfield Lane Murphy, TX 75094	Plano	wmosborn@me.com	1007	bassdenise	<input checked="" type="checkbox"/>
<a href="#">Bee, Billy</a>	4539 Pinchurst Greens Court Estero, FL 33928	Estero	wmosborn@me.com	1009	billybee	<input checked="" type="checkbox"/>
<a href="#">Burke, Mary</a>	2100 Custer Rd Plano, TX 78023	Central Plano	wmosborn@me.com	1004	maryburke	<input checked="" type="checkbox"/>
<a href="#">Clooney, George</a>	18127 Red Rose Lane Roscoe, IL 60169	NCT	william@servicefactor.com		georgeclooney	<input checked="" type="checkbox"/>
<a href="#">Doc, Jane</a>	123 A Avenue San Antonio, TX 78247	Converse	test@gmail.com		nolan	<input checked="" type="checkbox"/>
<a href="#">Duck, Donald</a>	3400 Custer Rd Plano, TX 75023	Central Plano	mtuttle@earthlink.net	1002	donaldduck	<input checked="" type="checkbox"/>
<a href="#">Hendricks, Chris</a>	8063 Pegasus Avenue Unit 2 Highstown, NJ 08520		mtuttle924@hotmail.com	1005	chrishendricks	<input type="checkbox"/>
<a href="#">Jones, George</a>	4516 Green Tree Houston, TX 77070		wmosborn@me.com	1008	jonesgeorge	<input checked="" type="checkbox"/>
<a href="#">Jones, Jeff</a>	3514 5th St SW Lehigh Acres, FL 33076	Plano	william@servicefactor.com		jeffjones	<input checked="" type="checkbox"/>

FILTER BY

Clear All

Site Name

Search and select

Zone

Search and select

UNIQUE ID

From To

Sort By

Site Name

## Reports – A Customer Portal Label Report has been added

This report is designed to be used in conjunction with the "Customer Portal" module and is for printing QR Codes on pre-printed business card stock or on 1.5"X1.5" labels that can be affixed to preprinted forms, such as refrigerator magnets. Each QR Code printed will have a unique number embedded in the URL that can be assigned to a customer and when scanned via a mobile device, will allow the customer to access their customer portal where they can perform various functions, such as entering a service call online, schedule their inspections, pay their invoices, view their history, view their equipment, etc.

