SF Release Notes: June 20, 2022
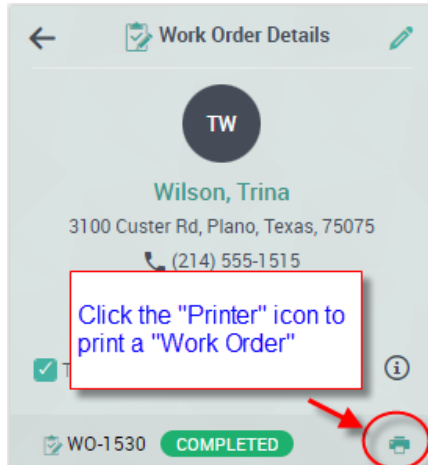
Service Agreement Billing and Maintenance Timetables have been enhanced.

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.

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.

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.

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.

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.

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.

Invoice

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

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	Site Address
Stauble Dave 5852 Inverness Circle, Fort Myers, FL 33903	**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 20	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

	Sub Total	$465.97
As a Value Club Member, you saved $73.40 today. Thank you for being a Value Club Member.	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.

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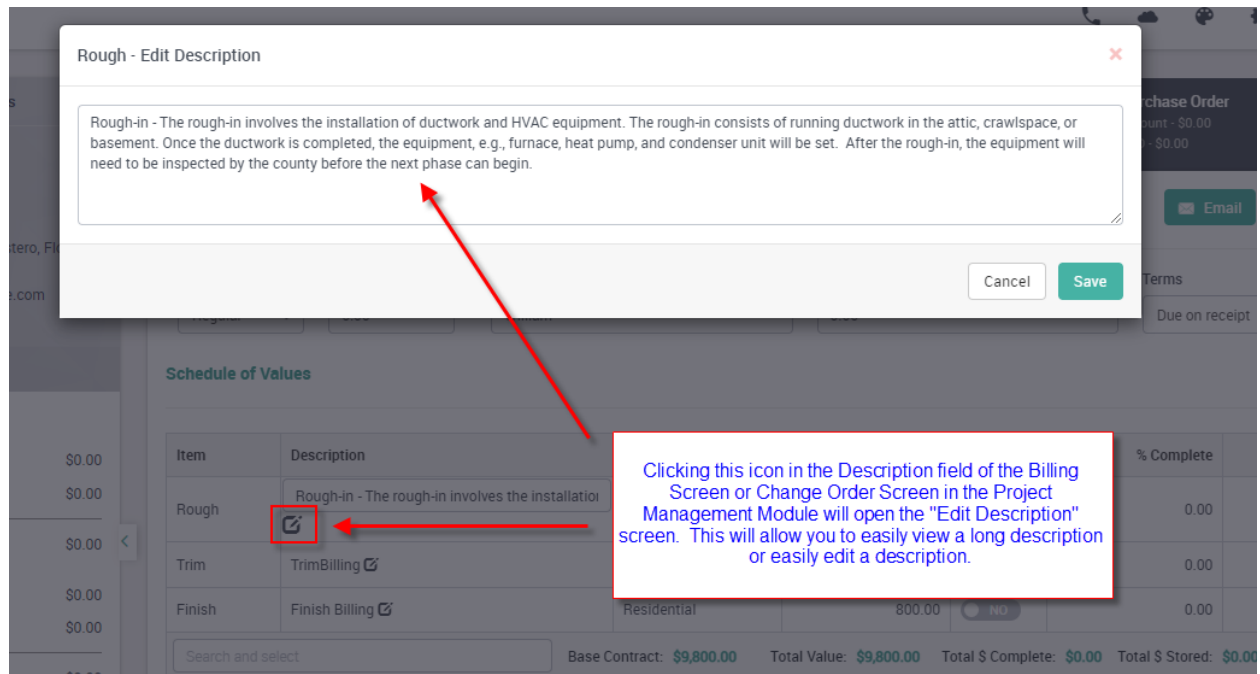
Communication Template – A Communication Template has been added for emailing Project Management (Job) Invoices

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.

Basic Details

Template
| Job Invoice ▾ |

Exclude Customer Type
| |

No of days before the reminder should be sent
| |

No of days after the reminder should be sent
| |

☐ Only allow manual sending

Send At (Approximate)
| 16:00 🕐 |

Email SMS Phone

This template is used to specify the default text that gets used when sending a job invoice to the customer from the office.

✅ Active

Reply to Address
| nate@teamservice.com |

BCC
| nate@teamservice.com |

Subject *
| Project Management Invoice |

Email Body

| ✂ ⎘ 📋 📋 📋 | ↶ ↷ | ✓ABC▾ | 🔗 🔗 ⚑ | 🖼 ⊞ ≡ Ω | ⛶ | 🔲 Source |
| B I S Iₓ | ≔ ⋮≡ | ⇤ ⇥ | ❞ | Styles ▾ | Normal ▾ | ? |

Dear [_customer_firstname_],

Thank you for allowing AA Service Company to work on your project located at [_workorder_address_single_line_]. Attached, please find invoice [_invoice_number_] for the current job draw. If you provided a Purchase Order number for this job, the PO Number is: [_job_po_number_].

Insert Codes
Use the following codes to customize your communication

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

Email   ✕

To *
| john@email.com ✖   ↻ |

CC
| |

Subject *
| Project Management Invoice |

Email Body

| ✂ ⎘ 📋 📋 📋 | ↶ ↷ | ✓ABC▾ | 🔗 🔗 | ⊞ |
| B I U S Iₓ | ≔ ⋮≡ | ⇥ ⇤ | ❞ | 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

Communication Template - A Communication Template has been added for emailing Maintenance Invoices from ServiceFactor Mobile

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.

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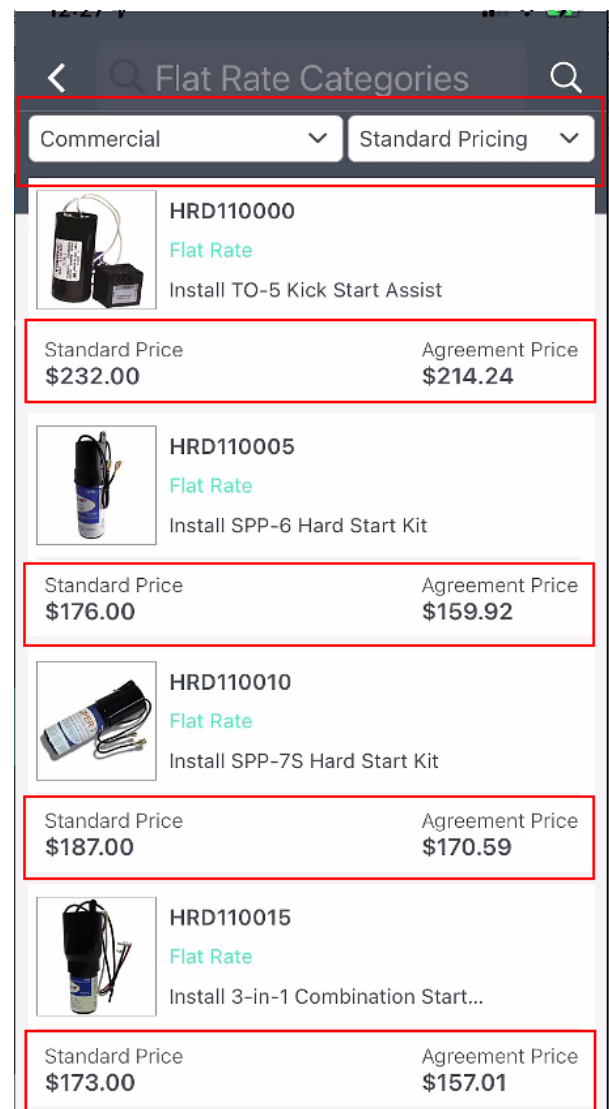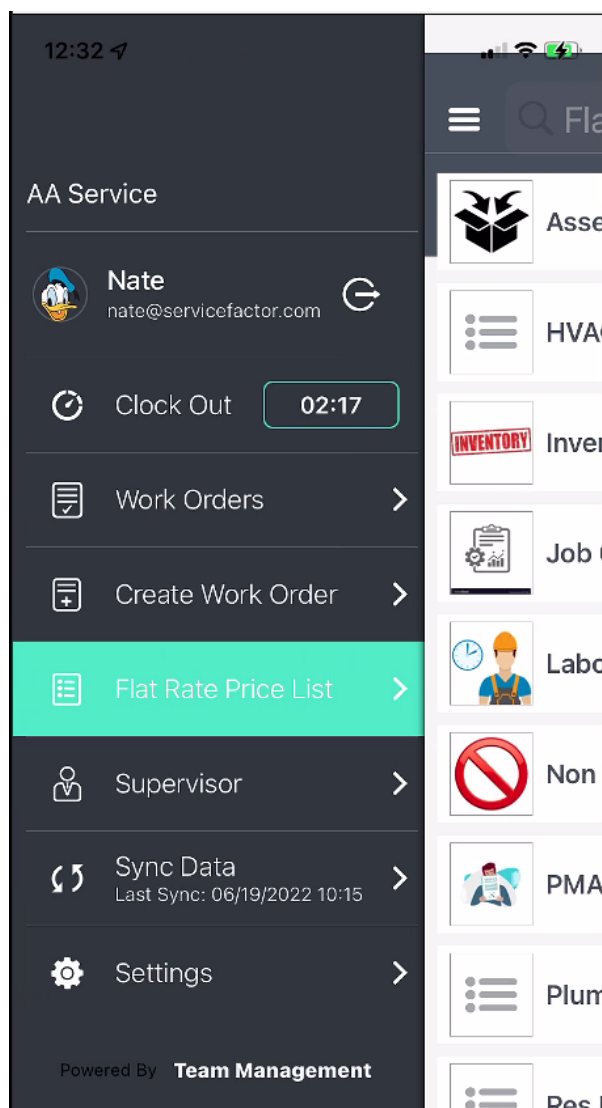
SF Mobile – You now have an option to turn off the Internet Speed Limit Settings

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.
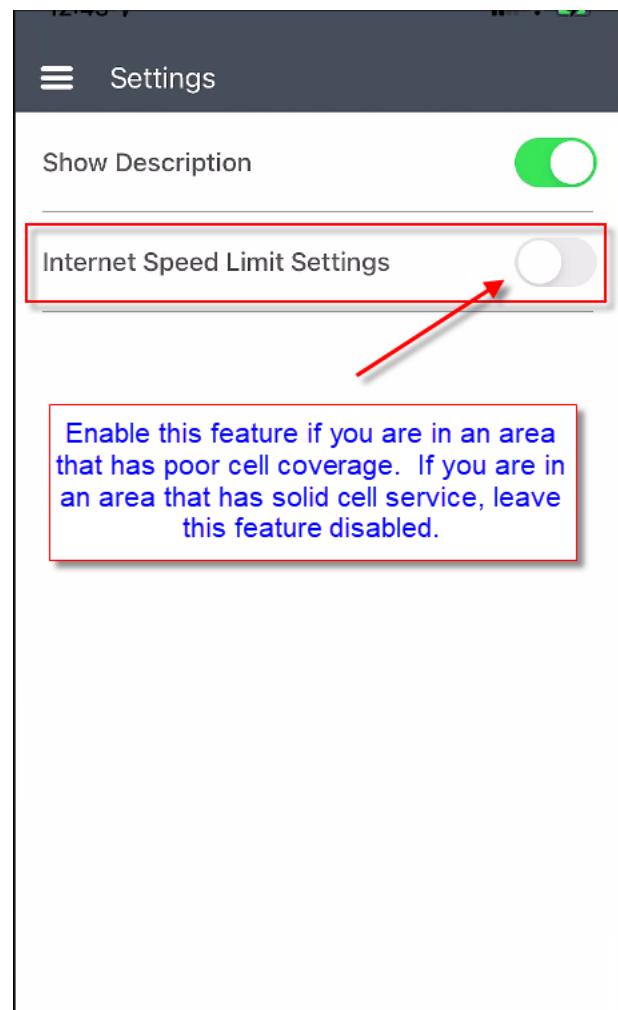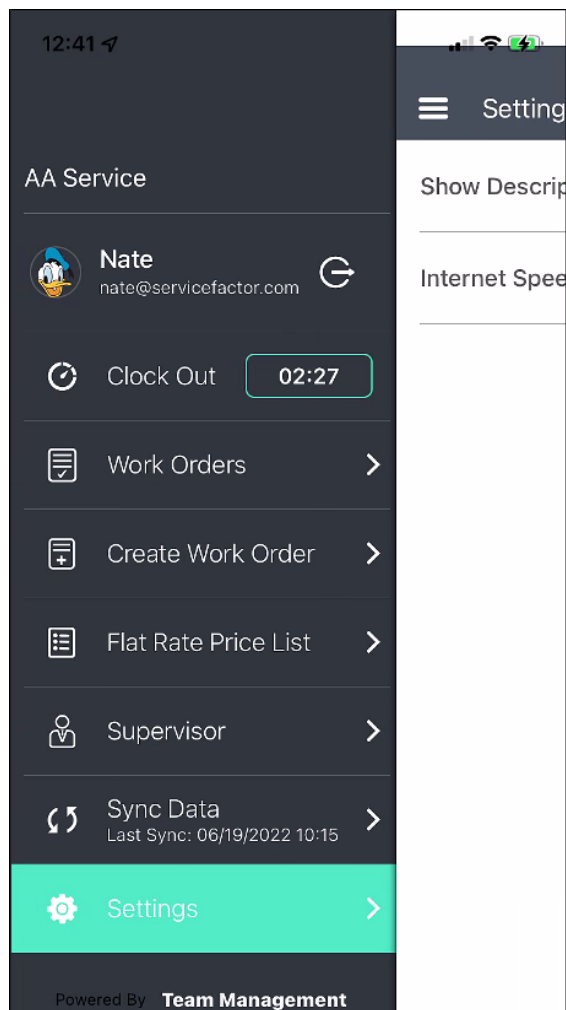
Reports – A "Work Order Call Back Report" has been added

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.

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	WO-814	Clooney, George	Brett	01/12/2020	0.00	306.68	0.00	2,609.05	-2,317.70	-795.50%		
CB	WO-5703	Clooney, George		04/14/2022	12.99	0.00	0.00	0.00	12.99	100.00%	WO-814	☐
					12.99	306.68	0.00	2,609.05	-2,304.71	-757.28%		
Orig	WO-4012	O'Rourke, Lisa	Drew	06/14/2021	252.50	168.00	2.38	0.00	418.12	99.43%		
CB	WO-5677	O'Rourke, Lisa		04/13/2022	150.00	0.00	0.00	0.00	150.00	100.00%	WO-4012	☐
					402.50	168.00	2.38	0.00	568.12	99.58%		
Orig	WO-4249	Smith, Randy	Drew	11/23/2021	131.25	231.32	0.68	34.16	327.73	90.39%		
CB	WO-5614	Smith, Randy	Billy Bob	04/04/2022	0.00	36.00	1.76	18.58	15.66	43.50%	WO-4249	☐
					131.25	267.32	2.44	52.74	343.39	86.16%		
Orig	WO-5123	Jones, Riley	Brett		0.00	0.00	0.00	80.00	-80.00	0.00%		
CB	WO-5124	Jones, Riley	Chuck Tuttle	01/05/2022	302.00	214.00	47.95	0.00	468.05	90.71%	WO-5123	☐
					302.00	214.00	47.95	80.00	388.05	75.20%		
Orig	WO-5522	Johnson, Issac	Nate	03/24/2022	0.00	5.40	0.60	3.55	1.25	23.15%		
CB	WO-5523	Johnson, Issac	Nate	03/24/2022	0.00	113.23	2.10	48.59	62.54	55.23%	WO-5522	☑
					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%		

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.

Site Name	Site Address	Customer Zone	Recovery Email	Unique Code	Login	PW Assigned
Bass, Denise	404 Greenfield Lane Murphy, TX 75094	Plano	wmosborn@me.com	1007	bassdenise	☑
Bee, Billy	4539 Pinehurst Greens Court Estero, FL 33928	Estero	wmosborn@me.com	1009	billybee	☑
Burke, Mary	2100 Custer Rd Plano, TX 78023	Central Plano	wmosborn@me.com	1004	maryburke	☑
Clooney, George	18127 Red Rose Lane Roscoe, IL 60169	NCT	william@servicefactor.com		georgeclooney	☑
Doe, Jane	123 A Avenue San Antonio, TX 78247	Converse	test@mail.com		nolan	☑
Duck, Donald	3400 Custer Rd Plano, TX 75023	Central Plano	nmtuttle@earthlink.net	1002	donaldduck	☑
Hendricks, Chris	8063 Pegasus Avenue Unit 2 Highstown, NJ 08520		mtuttle924@hotmail.com	1005	chrishendricks	☐
Jones, George	4516 Green Tree Houston, TX 77070		wmosborn@me.com	1008	jonesgeorge	☑
Jones, Jeff	3514 5th St SW Lehigh Acres, FL 33976	Plano	william@servicefactor.com		jeffjones	☑

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.

1181	1182	1183	1184
1185	1186	1187	1188
1189	1190	1191	1192
1193	1194	1195	1196