

SF Release Notes: August 24, 2022

Invoices – Quick Post Feature has been added to ServiceFactor

A new “Quick Post” feature has been added to the system that will allow you to post a batch of invoices, as opposed to having to manually post each invoice individually. Quick Post is an optional feature that can be used for batch posting Service Agreement Invoices that are set up as “Bill from Office”, as well as the ability to allow individual service technicians to send back invoices from ServiceFactor Mobile set to be Quick Posted. You will need to give permission to each technician that you want to have the ability to mark their invoices to Quick Post. For example, if you have technicians that always properly fill out their invoices in the field, you can elect to give them permission for their invoices to be added to the Quick Post list. If you have technicians that are still training, or that do not always fill out the invoice the way you want, you can restrict permission for those technicians, so that you can review their invoices in more detail prior to posting.

When an invoice has been marked for Quick Post, it will appear in the “Quick Post” screen. The invoices listed can be filtered by Invoice Dates, Technician, Sales Rep, Invoice Type, Resolution Status, Business Entity or Class, allowing you flexibility in which invoices you batch post. When you process the list of invoices, the system will attempt to post all of the invoices listed and give you a status report indicating if the invoices posted, or if there was an issue that needs to be addressed.

NOTE – In addition to the system automatically marking invoices that match the appropriate criteria, you can also manually mark invoices for Quick Post after reviewing them if you want to post them as a batch instead of one at a time. The Quick Post slider is located in the Change Status function on the Invoice Screen.

The screenshot displays two parts of the ServiceFactor interface. The top part shows the 'All Invoices (1430)' screen with a table of invoices. A red box highlights the 'Quick Post' button in the top right corner, with a red arrow pointing to it from a text box that says 'Click the Quick Post button in the Invoices Menu option to access the Quick Post screen'. The bottom part shows the 'Quick Post Invoices' screen, which has a filter section and a table of invoices ready for posting.

All Invoices (1430)

Click the Quick Post button in the Invoices Menu option to access the Quick Post screen

Quick Post Print Run Mass Creation Print Export

Invoice #	Site Name	WO #	PO #	Invoice Date	Due Date	Total	Balance	Technician	Action	Saved
F-5509	Green, Jennifer	WO-6269	0	08/15/2022	08/15/2022	\$398.33	\$398.33	Nate		✓
A-5503	Costello, Mr. & Mrs. Dennis	WO-6280		08/13/2022	08/13/2022	\$186.38	\$186.38			✓
A-5507	Smith, Janet	WO-6284		08/15/2022	08/15/2022	\$220.00	\$220.00			✓

Quick Post Invoices Process

Invoice Start Date: Start Date Invoice End Date: End Date Technician: All Sales Rep: All Invoice Type: All Resolution Status: All

Business Entity: All Class: All Search Text: Search Invoice Only Invoices: NO

WO #	Site Name	Site Address	Invoice #	Invoice Date	Total	Balance	GP%	Technician	Business Entity	Action	Quick Post
	Smith, Janet	2244 Lancaster Ave	A-5507	08/15/2022	\$220.00	\$220.00	100.00%		Res Plumbing Service		Remove
	Costello, Mr. & Mrs. Dennis	4527 Pinehurst Greens Ct	A-5503	08/13/2022	\$186.38	\$186.38	100.00%				Remove
WO-6269	Green, Jennifer	11241 Pond Cypress St	F-5509	08/15/2022	\$398.33	\$398.33	64.42%	Nate	Res HVAC Service		Remove

The ability to print a “Call Slip” has been added to the system

A “Call Slip” is a printed work ticket that can be used by employees that do not use ServiceFactor Mobile. The printed Call Slip includes billing information, work site information, a description of the trouble reported by the customer, a place to enter service performed and a space to record labor and items used. Its layout resembles a pre-printed work ticket and has a place for the customer to authorize work and accept the work performed by signatures. When you print a Call Slip, you will have an option to include Site Notes, history and/or the equipment located at the site. If you elect to print the history and/or the equipment list, it will be printed on additional pages.

NOTE – You can print an individual Call Slip from the Work Order file or print a group of Call Slips from the Work Order Reports menu.

Print ✕

Work Order

(Similar to an invoice, but does not include prices)

Call Slip

(Printed Work Ticket)

☐ Include History

☐ Limit History to the Last 5 Calls

☐ Include Site Notes

☐ Include Equipment

WO #

WO-6286

AA Service

11528 Fairway Lakes Drive

Fort Myers, FL 33013

Phone: (817) 881-3949

NEED TO GET LIC #

Source: Existing Customer

Taken By: Nate

Date: 08/15/2022

Time: 3:26:07 PM

Promised:

Scheduled: 08/15/2022 04:45 PM - 06:15 PM

Tech: Brett

Zone:

Terms: Due on receipt

Work to be performed at:

Anderson Jr, Steve

1515 Town East

Mesquite, TX 75150

Contact: Jr

Phone: (817) 555-4847 Mobile: (214) 555-1414

S/A TYPE:

Billing Account:

Anderson Jr, Steve

1515 Town East

Mesquite, TX 75150

Contact: Steve

Phone: (817) 555-4847 Mobile: (214) 555-1414

P.O Number:

Site Notes

Do not let the dog out of the gate. He is friendly, but will run if he gets the chance.

Gate code to get into community is *1234

Trouble Reported

System is blowing cool air and the furnace is making a strange noise.

Service Performed

Quantity	Repair/Part Number	Description	Unit Price	Total Price

Tech: _____ Date Serviced: _____ Job Complete: ☐ Yes ☐ No TOTAL: _____

1. Time In: _____ Time Out: _____ Total Hours: _____ TAX: _____

2. Time In: _____ Time Out: _____ Total Hours: _____ TOTAL DUE: _____

I have the authority to order the above work and do so order as outlined above. It is agreed that the seller will retain title to any equipment or material furnished until final & complete payment is made. And if a settlement is not made as agreed, the seller shall have the right to remove the same and the seller will be held harmless for any damages resulting from the removal thereof.

Signature: _____ Date: _____

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.

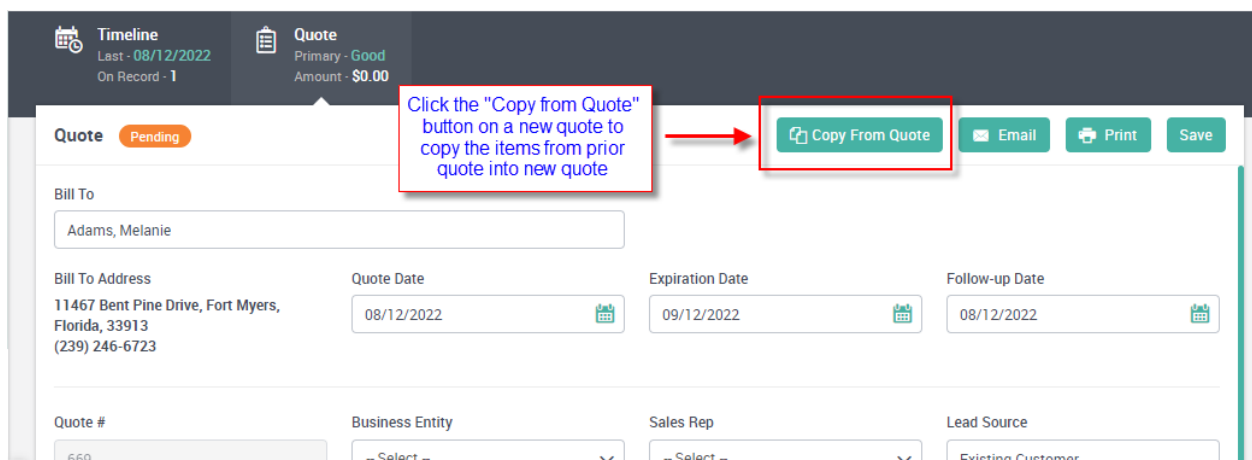
Signature: _____ Date: _____

Quotes – You can now copy an existing quote into a new quote

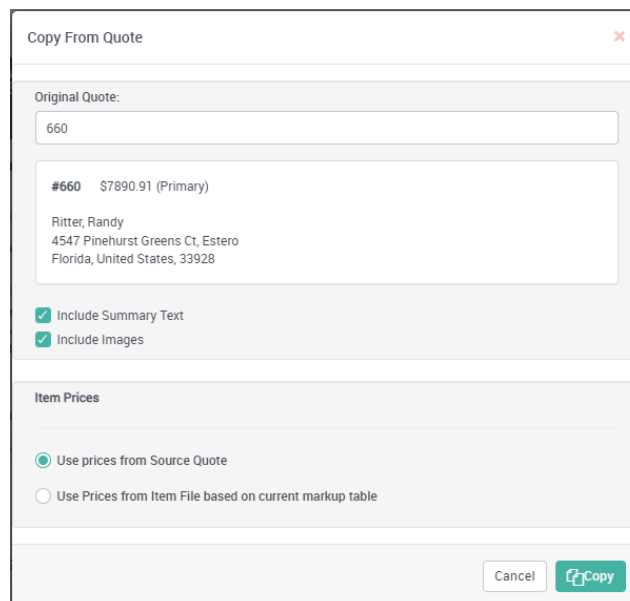
You can now copy an existing quote into a new quote. If you have multiple tabs associated with the quote, each of the tabs will also be copied into the new quote. Many times you do the same quote, or a very similar quote over and over. With the new Copy Quote feature, you can copy the details of a prior quote into your new quote, eliminating the need to add all of the items again, which is a huge time saver. When you copy a prior quote, you have the option to use the prices from the original quote, or use the prices from the Item File based on the current markup table, if the items are not defined with a set sell price. This will allow you to use existing quotes, but be assured that the pricing is up to date based on the current cost and markups.

When you search for the quote from which you want to copy, the original quote number, customer name, address and primary sell price will be displayed to make sure you are selecting the correct quote. After selecting the quote from which you want to copy, you will choose what pricing to use for the new quote. Once you click the copy button, all of the items and tabs from the prior quote will be added to your new quote.

NOTE – You can copy multiple quotes into a new quote, which will add new tabs to the quote based on the tabs from the prior quotes.



The screenshot shows a 'Quote' form with a 'Pending' status. A red box highlights the 'Copy From Quote' button in the top right corner, with a red arrow pointing to it. A text box next to the button says: 'Click the "Copy from Quote" button on a new quote to copy the items from prior quote into new quote'. The form includes fields for 'Bill To' (Adams, Melanie), 'Bill To Address' (11467 Bent Pine Drive, Fort Myers, Florida, 33913), 'Quote Date' (08/12/2022), 'Expiration Date' (09/12/2022), 'Follow-up Date' (08/12/2022), 'Quote #' (669), 'Business Entity' (Select), 'Sales Rep' (Select), and 'Lead Source' (Existing Customer).






The 'Copy From Quote' dialog box shows the 'Original Quote' as 660. It displays the quote details: #660, \$7890.91 (Primary), Ritter, Randy, 4547 Pinehurst Greens Ct, Estero, Florida, United States, 33928. There are two checked options: 'Include Summary Text' and 'Include Images'. Under 'Item Prices', there are two radio buttons: 'Use prices from Source Quote' (selected) and 'Use Prices from Item File based on current markup table'. At the bottom, there are 'Cancel' and 'Copy' buttons.

A Summary Detail and Image option has been added to Quotes

A new option has been added to each tab of the Quotes that allow you to enter a summary description and image for each tab of the quote. When you email the quote, there will be an option to view the quote. The image and summary text will be included when viewing the quote, giving the customer details as to what each quote option includes (Good, Better, Best options for example).

The screenshot shows the 'Quote Items' tab in a software interface. At the top, there are three tabs: 'Good', 'Better' (selected), and 'Best'. Below the tabs is a table with columns: Item, Description, Qty, Rate (\$), Amount (\$), Tax, Equipment, Class, Print, and an empty column. The first row of the table has the description 'The XR16 home air conditioning'. To the right of the table, there are three buttons: 'Summary Detail', 'Profitability Details', and 'Pending' with a dropdown arrow. A red box highlights the 'Summary Detail' button with the text 'Click the Summary Detail Button to include Summary Text and an Image to the corresponding tab'. A red arrow points from the 'Summary Detail' button to the 'Summary Detail' tab.

The screenshot shows the 'Summary Detail' dialog box. It has a 'Text Codes' dropdown menu. Below it is a 'Summary Text' field with a rich text editor toolbar. The text in the field is: 'Replace existing HVAC system with a new high efficiency system. Replacement includes removing existing compressor and air handler and replacing with new equipment. This quote includes replacing the existing lineset with a new properly sized lineset per manufacturer's recommendation for maximum efficiency. This quote includes a 10 year parts and labor warranty.' There is a 'body p' label at the bottom left of the text area. A 'Save' button is at the bottom right.

Quote Option			
	Good Replace existing HVAC system with new high efficiency system. Replacement includes removing existing compressor and air handler and replacing with new equipment.	Sub Total Tax (6.50 %) Total	\$6,490.91 \$0.00 \$6,490.91
	Accept View Details <small>By clicking 'approve', you agree to our terms of service</small>	Total	\$6,490.91
	Better Replace existing HVAC system with new high efficiency system. Replacement includes removing existing compressor and air handler and replacing with new equipment. This quote includes replacing the existing lineset with a new properly sized lineset per manufacturer's recommendation for maximum efficiency. This quote includes a 10 year parts and labor warranty.	Sub Total Tax (6.50 %) Total	\$7,890.91 \$0.00 \$7,890.91
	Accept View Details <small>By clicking 'approve', you agree to our terms of service</small>	Total	\$7,890.91
	Best Replace existing HVAC system with new high efficiency system. Replacement includes removing existing compressor and air handler and replacing with new equipment. This quote includes replacing the existing lineset with a new properly sized lineset per manufacturer's recommendation for maximum efficiency. Replace existing ductwork with new properly sized and designed ductwork to offer maximum efficiency. The ducts will be balanced in order to maintain consistent temperatures in each room. This quote includes a 10 year parts and labor warranty.	Sub Total Tax (6.50 %) Total	\$11,432.91 \$208.00 \$11,640.91
	Accept View Details <small>By clicking 'approve', you agree to our terms of service</small>	Total	\$11,640.91

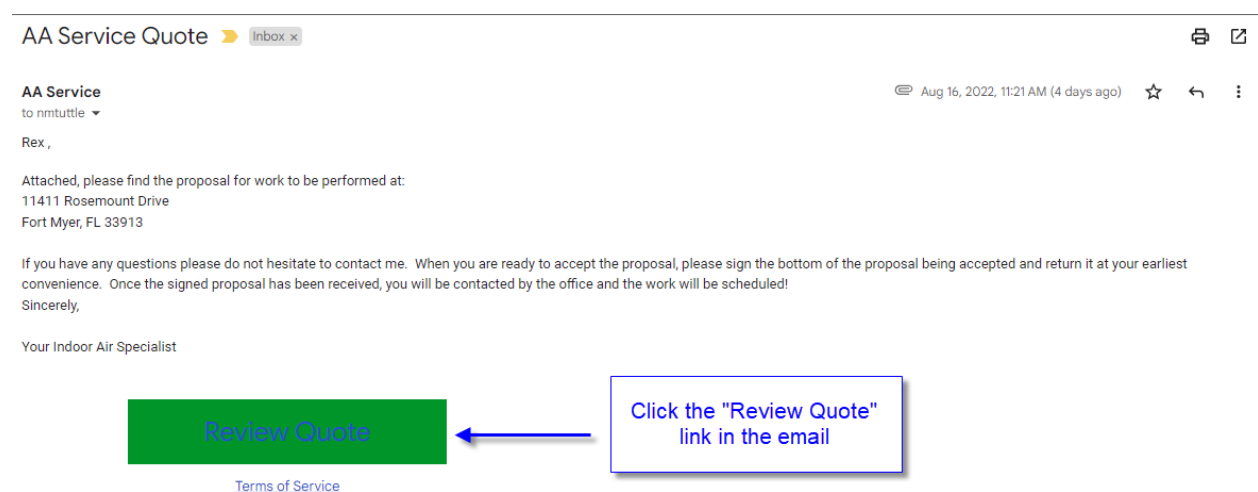
Emailed Quotes have been revamped and will now allow the customer to view the details of the quote and ultimately accept or reject the quote online.

When you email a quote to the customer, they will have the option to view the details of the quote online, as opposed to only being able to view a PDF. When you click the Review Quote button in the email, a link will open that shows the different quote options, (Good, Better, Best for example) with an image and a summary of each option. If you drill down into a particular option, the details of the option will be displayed along the ability to accept the particular option. If an option is accepted, the customer will have a place to enter their name and any notes that they would like to convey. The status of the quote will be changed to accepted in ServiceFactor and an email will be sent to a pre-defined email address letting the office know that the quote has been accepted. Quotes that are accepted online, vs. someone in the office changing the status to accepted, will display the status in blue as opposed to green in the Accepted Tab.

If the quote is declined, the customer will be required to enter their name as well as an option to enter any additional notes if they would like. This will send an email back to the office letting the office know that the quote was declined, change the status of the quote to “Declined” and display the quote in a new Declined tab in the Quotes menu. Once you have followed up on the declined quote, you can change the status to Lost to remove it from the Declined tab. If the customer attempts to review a declined quote, they will be alerted that the quote was previously declined and will be prompted to request a new quote. This will send an email to the office alerting them that the customer has requested a new quote. At this point, you can change the status of the declined quote back to pending and resend it, or generate a new quote for the customer.

If the quote expires and the customer tries to review it, they will be alerted that the quote has expired and given an option to request a new quote. When they request a new quote, an email will be sent to the office alerting them that the customer has requested an update to the expired quote. If the quote is still valid, you can change the expiration date and resend the quote, or you can generate a new quote if anything has changed since it expired, such as the sell price or additional features, etc.

NOTE – In addition to the new quote details that are included in the email, the system will also include a PDF copy of the quote when it gets emailed.





AA Service

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

Bill To Address	Site Address	Quotation
Jett, Rex 11411 Rosemount Drive Fort Myer, FL 33913	Jett, Rex 11411 Rosemount Drive Fort Myer, FL 33913	Date: 08/09/2022 Quote No: 668 Exp Date: 09/09/2022 Sales Rep:

Quote Option



Good

Replace existing HVAC system with new high efficiency system.
Replacement includes removing existing compressor and air handler
and replacing with new equipment.

Sub Total	\$6,490.91
Tax (6.50 %)	\$0.00
Total	\$6,490.91

Accept

View Details

Click the View Details button on any of the options to view the details and accept the particular option.

By clicking 'approve', you agree to our [terms of service](#)

Total \$6,490.91



Better

Replace existing HVAC system with new high efficiency system.
Replacement includes removing existing compressor and air handler
and replacing with new equipment.

This quote includes replacing the existing lineset with a new properly
sized lineset per manufacturer's recommendation for maximum
efficiency.

This quote includes a 10 year parts and labor warranty.

Sub Total	\$7,890.91
Tax (6.50 %)	\$0.00
Total	\$7,890.91

Accept

View Details

By clicking 'approve', you agree to our [terms of service](#)

Total \$7,890.91



Best

Replace existing **HVAC system** with new high efficiency system.
Replacement includes removing existing compressor and air handler
and replacing with new equipment.

This quote includes replacing the existing lineset with a new properly
sized lineset per manufacturer's recommendation for maximum
efficiency.

Replace existing ductwork with new properly sized and designed
ductwork to offer maximum efficiency. The ducts will be balanced in
order to maintain consistent temperatures in each room.

This quote includes a 10 year parts and labor warranty.

Click the Decline Button at the bottom of the screen to decline all quote options

Sub Total	\$11,432.91
Tax (6.50 %)	\$208.00
Total	\$11,640.91

Accept


View Details

By clicking 'approve', you agree to our [terms of service](#)

Total \$11,640.91

DECLINE





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

Bill To Address	Site Address	Quotation
Jett, Rex 11411 Rosemount Drive Fort Myer, FL 33913	Jett, Rex 11411 Rosemount Drive Fort Myer, FL 33913	Date: 08/09/2022 Quote No: 668 Exp Date: 09/09/2022 Sales Rep:

Quote

Quote Total \$7,890.91

Accept Quote

By clicking 'approve', you agree to our [terms of service](#)

Customer can accept the selected option within the Details of the quote, or from the summary page.

Better



Replace existing HVAC system with new high efficiency system. Replacement includes removing existing compressor and air handler and replacing with new equipment.

This quote includes replacing the existing lineset with a new properly sized lineset per manufacturer's recommendation for maximum efficiency.

This quote includes a 10 year parts and labor warranty.

Description	Quantity	Unit price	Amount
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	2446.20	2446.20
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	1629.75	1629.75
50 Feet of 3/8" LL x 7/8" SL x 3/8" Insulated Line Set	2.00	517.50	1035.00
Installation of 36" x 48" 3" Ultralite Condensing Unit Pad	1.00	409.96	409.96
10 Year Parts & Labor Warranty	1.00	1400.00	1400.00
Regular Time Labor @ \$125 per hour	8.00	121.25	970.00
Sub Total			\$7,890.91
Tax (6.50 %)			\$0.00
Total			\$7,890.91

Details of the Quote are shown on the Left Hand Side. NOTE - You can hide the individual prices, or Hide individual prices between subtotals, based on your settings. This will allow you to show the details of the Quote, but just show a Total Sell price at the bottom, or Subtotal of specific items in the quote body itself.

AA Service - Customer accepted quote (668)

AA Service <environ.servicefactor@gmail.com>

Sent: Sat 8/20/2022 1:28 PM

To: nate@teamservice.com

AA Service

This email was sent in response to a customer accepting a quote

Below is the information related to the quote:

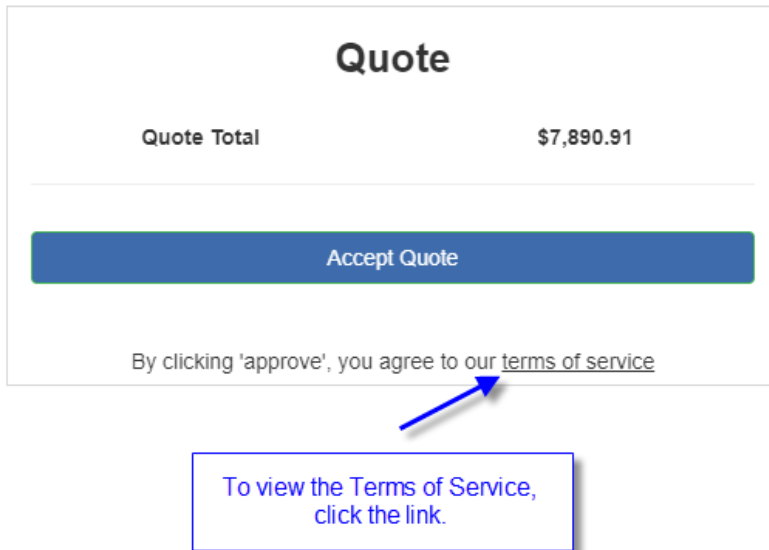
Quote Number: 668
Customer Name: Jett, Rex

Accepted Notes:

Please contact me at your earliest convenience so that we can schedule a date and time for the installation

Quotes – A Terms of Service page has been added to E-Mailed Quotes

You can now define a Terms of Service for quotes that will be viewable from emailed quotes. The Terms of Service will be a clickable link located in the initial email, in the Quote Summary page, as well as the Quote Detail. Clicking the link will display the Terms of Service associated with the Quote. The Terms of Service for the quote will need to be added in the Settings.



See below for the Terms & Conditions for new installation.

- 1. Scope of Terms and Conditions.** The Terms and Conditions of product sales and service projects are limited to those contained herein. Any additional or different terms or conditions in any form delivered by you ("Customer") are hereby deemed to be material alterations and notice of objection to them and rejection of them is hereby given. By accepting delivery of the products or by engaging AA Service Company ("Seller") to provide product(s) or perform or produce any services, Customer agrees to be bound by and accepts these Terms and Conditions unless Customer and Seller have signed a separate agreement, in which case the separate agreement will govern. These Terms and Conditions constitute a binding contract between Customer and Seller and are referred to herein as either "Terms and Conditions" or this "Agreement." Customer accepts these Terms and Conditions by making a purchase from or placing an order with Seller or engaging Seller to perform or procure any services. These Terms and Conditions are subject to change without prior notice, except that the Terms and Conditions posted on Seller's Site at the time Customer signs the Installation Proposal will govern, unless otherwise agreed in writing by Seller and Customer.
- 2. Payment Terms.** Customer shall pay Seller according to the terms contained in the Installation Proposal. Final payment shall be due after the work described in the Installation Proposal is substantially completed.
- 3. Zoning and Permits.** Customer agrees to timely furnish all information necessary to secure plans and permits for the work called for under this Agreement, and Customer warrants the work contracted for to be in compliance with applicable zoning, classification and building codes. Any costs for work not in the Estimate but required by lawful authorities to bring the work into compliance with applicable code shall be the responsibility of the Customer. Seller assumes no responsibility for violation of zoning rules laws.
- 4. Change Orders.** During the progress of the work under this Agreement, if Customer should order extra work not specified in the Agreement, Seller may require such extra work to be considered an agreement separate and aside from this Agreement and may require payment for said extra work in advance.
- 5. Work Schedule.** Work shall be completed within a reasonable time. Performance of this Agreement is subject to labor strikes, fires, acts of war or terrorism, acts of God, adverse weather conditions not reasonably anticipated, unusual delays in transportation, Seller's ability to obtain materials, and/or any cause beyond Seller's control.
- 6. Substitutions.** Should Seller be unable to obtain any material(s) specified in the Agreement or any Change Order, Seller shall have the right at its sole discretion to substitute comparable materials and such substitution shall not affect the Contract Price.
- 7. Supervision Responsibility.** Seller shall supervise and direct the work at Customer's Property, using reasonable skill and attention. Seller shall be solely responsible for the construction means, methods, technique, sequences, and procedures for all work performed at Customer's Property pursuant to this Agreement. Customer shall not interfere with Seller's work forces or Seller's subcontractors.
- 8. Limited Warranty.** Seller shall provide Customer with a limited warranty on service and labor for the duration set forth in the Installation Agreement, beginning on the date of completion of services against defects in the quality of workmanship and/or materials ("Warranty Period"). Seller shall not be liable during or following the Warranty Period for any: (a) damage due to ordinary wear and tear or abusive use; (b) damage due to use of the equipment beyond the design temperatures; (c) defects that are the result of characteristics common to the materials used; (d) loss, injury or damages caused in any way by the weather elements; (e) conditions resulting from condensation on, or expansion or contraction of, any materials; (f) any water leak, blockage, freezing, or other malfunction of condensate or drain lines; and/or (g) air leaks arising from structural deficiencies within existing supply/return ducts or transitions. If Customer opts for a Warranty Period exceeding two (2) years, Customer agrees to maintain yearly service agreements with Seller for the entire duration of the Warranty Period. Seller shall not be liable for warranty repairs during the Warranty Period in the absence of such yearly service agreement(s). If the Customer sells the home then the equipment will default to base warranty of 5 years parts and 5 years labor (assuming maintenance agreement is kept current). If applicable, Customer is responsible for paying equipment manufacturer for any transfer of equipment warranty. Seller is not responsible for any warranties provided by the manufacturer. Seller makes no warranty to Buyer regarding materials and/or equipment installed (other than a warranty of title), and Seller authorizes no third person or party to assume any warranty obligation or liability on Seller's behalf. The only warranties applicable to the materials and/or equipment installed are those, if any, extended by the respective manufacturer that shall furnish to Buyer any and all applicable warranty documents. Seller hereby assigns to Buyer, without recourse, any applicable warranties extended to Seller. Such assignment shall constitute Seller's sole obligation and Buyer's sole exclusive remedy from Seller with regard to defective materials and/or equipment installed. **This limited warranty is in lieu of all other warranties, statutory or otherwise, express or implied, all representations made by Seller, and all other obligations or liabilities respective of the Services provided at the Property. Seller disclaims all other warranties, express or implied, including without limitation any implied warranty of workmanlike construction, implied warranty of habitability, implied warranty of fitness for a particular purpose or use, and/or implied warranty of merchantability. Under no circumstances shall Seller be liable to Customer for loss of time, loss of use, inconvenience, or any other incidental or consequential damages that may arise from this Agreement. Unauthorized repairs or attempted repairs shall void this warranty entirely.**
- 9. Performance or Condition of Existing Equipment.** Seller is not responsible for the performance, functionality, or compatibility of existing equipment, ductwork, duct board, controls, or other equipment materials that is not replaced during a job installation and that Customer agrees to keep in place. In the event that the system fails to operate properly, the Warranty service will only cover the newly installed equipment, controls, or materials, as well as our workmanship. In the event that an existing piece of equipment prevents the proper start up or operation of the new equipment or system, Customer assumes all responsibility for any additional service charges that may be incurred.
- 10. Existing Line Set.** Seller is not responsible for any problems with heating or cooling due to the existing line set, which may require repair and replacement for an additional cost to the Customer in the event Seller is unable to pull a 500 micron vacuum on an existing line set. Should Customer reject Seller's recommendation to replace an existing line set, Seller's limited warranty is voided.
- 11. Paint, Patchwork, and Repairs.** Seller is not responsible for any painting, patchwork, or repair work that may be required following modification installation work.
- 12. Personal Property.** Seller is not responsible for damage to Customer's personal property left in or near the project area.
- 13. Existing Attic Access Stairs.** In the event Customer's existing stairs cannot be safely utilized for the removal and installation of equipment, an alternate method or access may be required. Seller is not responsible for (a) the replacement or repair of attic steps or stairs that must be removed to complete removal or installation work; and/or (b) any property damage resulting from the removal of the attic steps or stairs.
- 14. Mold.** Seller shall not be responsible for any claims, damages, actions, costs, or other liabilities, whether direct or indirect, that may be caused by, resulting from, or relating to, mold. The discovery and/or removal of any mold or any hazardous materials is excluded from the scope of Seller's work, and Seller reserves the right to stop work until such mold or hazardous materials are removed.
- 15. Insurance and Waiver of Subrogation.** Customer shall maintain property insurance upon the entire structure including all work to be performed pursuant to this Agreement to the full insurable value thereof. This insurance shall insure against the perils of fire, theft, extended coverage, vandalism, and malicious mischief. Customer and Seller waive all rights against each other for damages caused by insured perils whether or not such damage is caused by the fault or negligence of any party hereto.
- 16. Indemnification.** Customer shall indemnify, defend, and hold harmless Seller and its respective directors, officers, employees, agents, sureties, subcontractors, and suppliers from and against any and all losses, costs, expenses, damages, injuries, claims, demands, obligations, liabilities, judgments, fines, penalties, interest and causes of action, including without limitation administrative and legal costs and reasonable attorney's fees, involving the following: (a) injury or death to any person, or damage to or destruction of any property (including loss of use thereof), except to the extent caused by the sole negligence or intentional misconduct of Seller; and (b) any failure of the Customer to comply with the requirements of the Agreement.
- 17. Risk of Loss.** Risk of loss shall pass to the Customer upon delivery of materials and equipment to Customer's Property. Seller shall not be responsible for any loss due to fire, theft, vandalism, and/or malicious mischief once delivered to Customer's Property. Customer shall assume all responsibility for any such loss and Customer shall maintain insurance coverage to protect against such loss.
- 18. Severability.** Should any part of this Agreement be adjudged to be void, unenforceable, or contrary to public policy, only such void or unenforceable portion shall be stricken and eliminated hereof while the other portions remain valid and enforceable.
- 19. Performance.** If Customer fails to perform any of Customer's obligations herein or if Seller, in good faith, believes that the prospect of payment or performance to be impaired, Seller may upon seven (7) days written notice to Customer terminate this Agreement while retaining all mechanic's lien rights as well as right to payment for the full amount of work performed plus reasonable overhead and profit, interest, attorney's fees, and other charges due and unpaid.
- 20. Collections.** If amounts owing under this Agreement are not paid within thirty (30) days, Customer agrees to pay a late charge on any outstanding balance at one point 5 percent (1.5%) per month or eighteen per cent (18%) per annum on the unpaid amount calculated from the date payment was due. Customer will be deemed to have accepted Seller's performance as complete under this Agreement unless Customer notified Seller in writing otherwise within thirty (30) days of substantial completion. Should Seller retain the assistance of a third party, including without limitation an attorney, to assist with collection of unpaid amounts due and owing, Customer agrees to pay Seller's costs associated therewith including without limitation reasonable attorneys' fees, court costs, and interest at the maximum legal rate.
- 21. Entire Agreement.** This Agreement constitutes the entire agreement between Customer and Seller. No agreements, representations, or warranties other than those specifically set forth herein shall be binding on any of the parties unless set forth in writing and signed by both parties.

Job Cost – The “General Contractor Job Number” has been added to the Job Cost Invoice

The “GC Job Number” field has been added to the Regular Job Cost Invoice if applicable. Prior to this release, only the in-house Job Number appeared on the Regular Job Invoice. **NOTE** – The GC Job Number has always printed on the AIA Formatted invoice.

Job Details

Wilson, Jennifer
6382 Cocos Dr, Fort Myers, Florida, 33908
(239) 707-0243
nate@teamservice.com

ACCEPTED

Additional Information

Contract Amount \$9,500.00
Billed To Date \$2,375.00
Variance \$7,125.00

Wilson Replacement
Job #: 22-19

Status: Accepted Job Name: Wilson Replacement Approval Date: 07/08/2022 Sales Rep: Nate

Bill To: Wilson, Jennifer General Contractor Job #: 432231 Business Entity: Installation Lead Source: Existing Customer

Bill To: 6382 Cocos Dr, Fort Myers, Florida, 33908 (239) 707-0243 Note: Replace existing system

Markup: Standard 110 Class: Installation Tax: Florida 6.5% Use Tax: Check and adjust

ServiceFactor

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

Invoice

Invoice Date: 07/29/2022
Invoice No: J-383
Due Date: 07/29/2022
Sales Rep: Nate
Job PO:
Job No: 22-19
G C Job No: 432231

Bill To Address

Jennifer Wilson
6382 Cocos Dr,
Fort Myers, FL 33908

Site Address

Jennifer Wilson
6382 Cocos Dr,
Fort Myers, FL 33908

Description	Total Value	% Complete	\$ Complete	\$ Retainage
Installation of replacement HVAC System	9,500.00	25.00000	2,375.00	0.00

Contract Amount \$ 9,500.00
Total Change Orders \$ 0.00
25.00 % Billed Complete (Including this invoice) \$ 2,375.00
Less 0.00 % Retainage (This invoice) \$ < 0.00 >
Previously Invoiced \$ 0.00
Subtotal \$ 2,375.00
Tax \$ 0.00
Total due this invoice \$ 2,375.00

Job Cost – Job Timeline Screen will now display the Job Number

The Job Number has been added to the Job Cost Timeline screen. Prior to this release, the Job Number was on all the Job Screens except the Timeline Screen.

The screenshot shows the Job Cost Timeline screen for Job # 22-19. The job details on the left include the name Wilson, Jennifer, contact information, and financial data: Contract Amount \$9,500.00, Billed To Date \$2,375.00, Variance \$7,125.00, and C/O Amount \$0.00. The timeline on the right shows three entries: 07/29/2022 (TMS Admin: Job Invoice J-383 created for job 22-19), 07/12/2022 (Nate: Change order 1 selling price changed from \$0.00 to 0.00), and 07/08/2022 (Nate). The job number 'Job # 22-19' is highlighted in a blue box in the timeline header.

Job Cost – You will no longer be able to add a Purchase Order against a Posted Work Order

The system will now block you from being able to add PO against a posted Work Order. If you need to add a new PO to a Phase with a Posted Work Order, you can choose an unposted Work Order for the phase, or add a new Work Order. This will eliminate Job Work Orders from becoming unposted via adding a new Purchase Order.

The screenshot shows the 'Purchase Order - Create' screen. Fields include Ordered By (Nate), Created On, Last Date Changed, Billed to Date (\$0.00), Purchase Order #, PO Date (08/20/2022), Expected Delivery Date (08/20/2022), Ship to (Don't Print), Status (Open), PO Type (Project Management Job), Location / Job / Work Order (22-21 / Install 4Ton Complete), Phase / Change Order (Install), Work Order (WO-6150), Preferred Vendor (Grainger), Email (grainger@mail.com), Markup (Select), and Class (Installation). There are also checkboxes for 'No Charge' (YES) and 'Mark PO as Void' (NO), and a checkbox for 'Use Cost from Item File for Markup' (NO). A table at the bottom shows 'No records found' with columns for Item, Total Received, Distributed Quantity, Rate, Amount, Unit Sell, and Class. A red error message at the bottom states: 'This WO #WO-6150 is already posted to accounting. Create or Choose a different Work Order number for this task to proceed'. A blue box highlights this message, and a blue arrow points from a text box above it: 'The system will no longer allow you to add a PO against a Posted Job Cost Work Order'.

Purchase Orders – Ability to Re-Post the Work Order invoice to Accounting has been added to the Purchase Order and Vendor Bill

If you add an item to a Purchase Order whose associated Work Order Invoice has already been posted to Accounting, the PO will now prompt if you want to Re-Post the Work Order Invoice from the PO or Vendor Bill. This prompt will be triggered if you add a new Purchase Order to an already posted WO Invoice, or if you add an item to the posted WO Invoice via the Vendor Bill. This should eliminate forgetting to re-post invoices that become unposted via the Purchase Order and will save several steps. **NOTE** - If you try to add a new PO to a Posted Invoice, you will receive a prompt indicating that the invoice is already posted and adding a PO will unpost it. You will need to confirm if you want to continue with adding a new PO.

The screenshot displays the 'Vendor Bill - (Service PO #: PO-1000)' screen. A 'Confirmation' dialog box is overlaid in the center, asking: 'Warning - WO has been posted. Items will be added to the WO with \$0.00 sell price and the Work order invoice will need to be re-posted due to changes. Would you like to re-post the invoice now?'. The dialog has 'No' and 'Yes' buttons. The background interface includes fields for 'PO Type' (Service), 'Location / Job / Work Order' (WD-62747 Minuta, Jose), 'Vendor' (Johnstone Supply), 'Date Received' (06/20/2022), 'Packing Slip #' (Packing Slip Number), 'Invoice Total' (15.05), 'Invoice #' (233990), 'Terms' (Net 30), 'Invoice Date' (08/20/2022), and 'Due Date'. Below these is an 'Items' table with columns: Item, Description, Order Qty, Received, Amount, Unit Sell, Class, and Complete. The table contains two rows: 'CAP023' (7.5MM 370V Premium Capacitor) with an amount of \$9.9001, and 'Freight' with an amount of \$0.0000. A 'Total' of \$15.05 is shown at the bottom right.

Items – A Utility has been added to easily update the Item Cost and/or Sell Prices for Inventory and Non Inventory Items

An Update Utility has been added that will allow you to easily update the item Cost or Sell Price of inventory or non-inventory items based on the category of the item, the item type and even for a specific vendor. The costs or prices can be increased or decreased based on an overall percentage or a specific dollar amount. You can choose to affect the cost or price of all items of a particular item type (Labor, Material, Other or Subs), or narrow it down based on a specific category, such as just Motors for example. If the cost is adjusted, the system will automatically recalculate the sell prices for any items that have their sell price based on a Markup Price Type.

NOTE – If you are linked to QuickBooks, each item that is updated via the utility will need to be synced to QuickBooks. This syncing process will be done automatically behind the scenes and after the changes have finished syncing to QuickBooks, you will receive a notification in the “Bell Icon” at the top of your screen indicating that the process is complete and if any of the items failed

to update. Only after you have received the notification will all the items in QuickBooks be updated.

NOTE – The behind the scenes syncing is scheduled to automatically process every hour, so depending on when you run the utility, it could take up to an hour before the syncing process starts. Please be patient and watch for the notification to know when the syncing has completed.

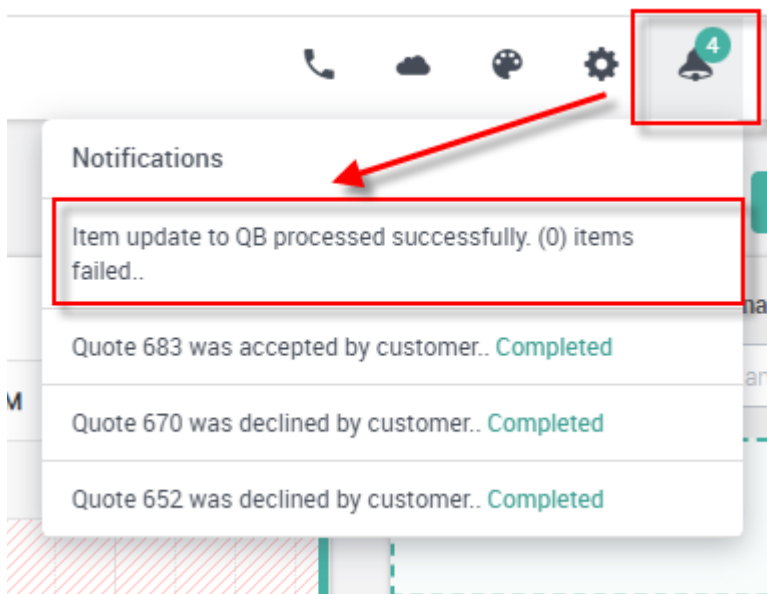
Update Item Costs or Sell Prices Process

☒ Inventory items ☒ Increase ☒ Cost ☒ Percent % ☒ All Vendors Item type ^{*} Material

☐ Non inventory items ☐ Decrease ☐ Sell price ☐ Dollar Amount \$

Warning - This utility will change cost of the items for categories selected or Sell price of items with a fixed sell price for the categories selected and cannot be undone. Proceed with caution!

<input type="checkbox"/> Category	Percent Adjustment	Dollar Amount Adjustment
<input type="checkbox"/> Inventory	<input type="text" value="5"/>	<input type="text" value=""/>
<input type="checkbox"/> Inventory -> 02 Plumbing - Fittings & Nipples	<input type="text" value="5"/>	<input type="text" value=""/>
<input type="checkbox"/> Inventory -> Blank	<input type="text" value="5"/>	<input type="text" value=""/>
<input checked="" type="checkbox"/> Inventory -> 01 HVAC -> Chemicals & Cleaning	<input type="text" value="5"/>	<input type="text" value=""/>
<input type="checkbox"/> Inventory -> 01 HVAC -> IAQ	<input type="text" value="5"/>	<input type="text" value=""/>
<input type="checkbox"/> Inventory -> 01 HVAC -> Thermostats	<input type="text" value="5"/>	<input type="text" value=""/>



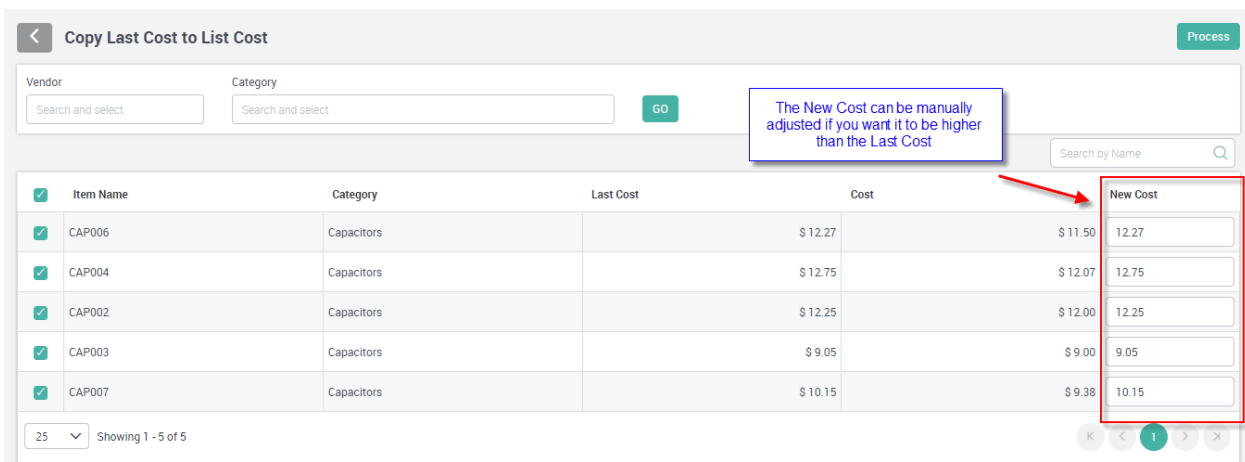
Items – A Utility has been added to copy the Last Cost to the List Cost (Cost) for Inventory Items

A new utility will allow you to copy the Last Cost of an Inventory Item to the List Cost field of the item, if the Last Cost is greater than the List Cost. The List Cost field is used for marking up items and is typically equal to, or higher than the actual cost being paid for an item. This keeps the sell price of an item consistent when actual costs vary. This utility will display all items where the Last Cost is greater than the List Cost and allow you to select which items for which you would like to update the List Cost. You can choose a specific vendor and/or category of an item and manually adjust the New Cost if you want it to be more than the Last Cost. Once you update the Cost, the

system will automatically recalculate the Sell price for any item that is using a Markup and will automatically update QuickBooks with the changes if applicable.

NOTE – If you are linked to QuickBooks, each item that is updated via the utility will need to be synced to QuickBooks. This syncing process will be done automatically behind the scenes and after the changes have finished syncing to QuickBooks, you will receive a notification in the “Bell Icon” at the top of your screen indicating that the process is complete and if any of the items failed to update. Only after you have received the notification will all the items in QuickBooks be updated.

NOTE – The behind the scenes syncing is scheduled to automatically process every hour, so depending on when you run the utility, it could take up to an hour before the syncing process starts. Please be patient and watch for the notification to know when the syncing has completed.



Item Name	Category	Last Cost	Cost	New Cost
CAP006	Capacitors	\$ 12.27	\$ 11.50	12.27
CAP004	Capacitors	\$ 12.75	\$ 12.07	12.75
CAP002	Capacitors	\$ 12.25	\$ 12.00	12.25
CAP003	Capacitors	\$ 9.05	\$ 9.00	9.05
CAP007	Capacitors	\$ 10.15	\$ 9.38	10.15

Payroll (via SF Mobile) – An “Idle Time” buffer has been added to the system

An Idle Time buffer has been added to the system that will allow you to define a fixed amount of time for which you want the system to not consider Idle Time for technicians completing one call and dispatching them to another. For example, if you set your Idle Time buffer to 10 minutes and a technician completes a call at 9:48 AM and does not change their status to Traveling or Working on their next call until 9:53 AM, the system will start their time on the new call at 9:48 AM, eliminating any Idle time between calls. If the tech were to start their Travel or Working time on their next call later than 10 minutes from their prior call, such as 10:03 AM, the system would start the time at 10:03 AM and the technician would have 15 minutes of Idle time on their time card. This will eliminate multiple lines of Idle Time on the time card that are less than the amount of time you have defined. If you do not want the system to eliminate Idle Time, then set the Idle Time Buffer field to 0 (zero), and it will not adjust the Travel or Working start times.

NOTE – The Idle Time Buffer is setup in the Master Settings Screen.

Company - Master Settings

Cancel Save

Basic Information

Name: AA Service Time Zone: (GMT-05:00) Eastern Time (US & Canada)

Contact Details

Address Line 1: 11928 Fairway Lakes Drive Address Line 2: Address Line 2

City: Fort Myers State Code: FL Zip: 33013 Country: United States

Email: sales@teamservice.com Web: Phone: (817) 881-3949 Fax: Phone

Working Hours

Start Time: 08:00 AM End Time: 07:00 PM Idle Buffer Time (Minutes): 10

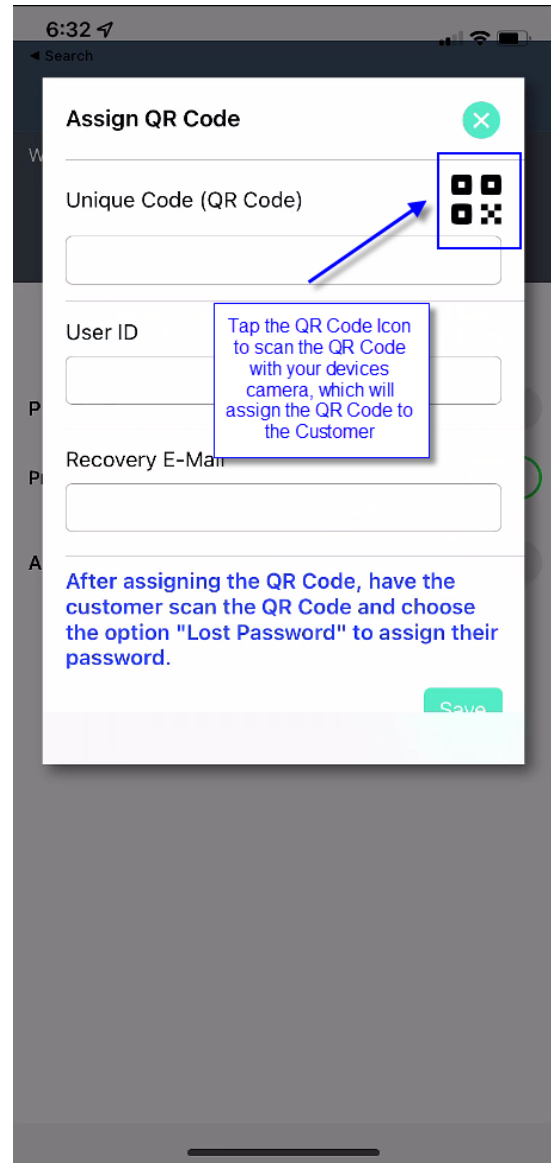
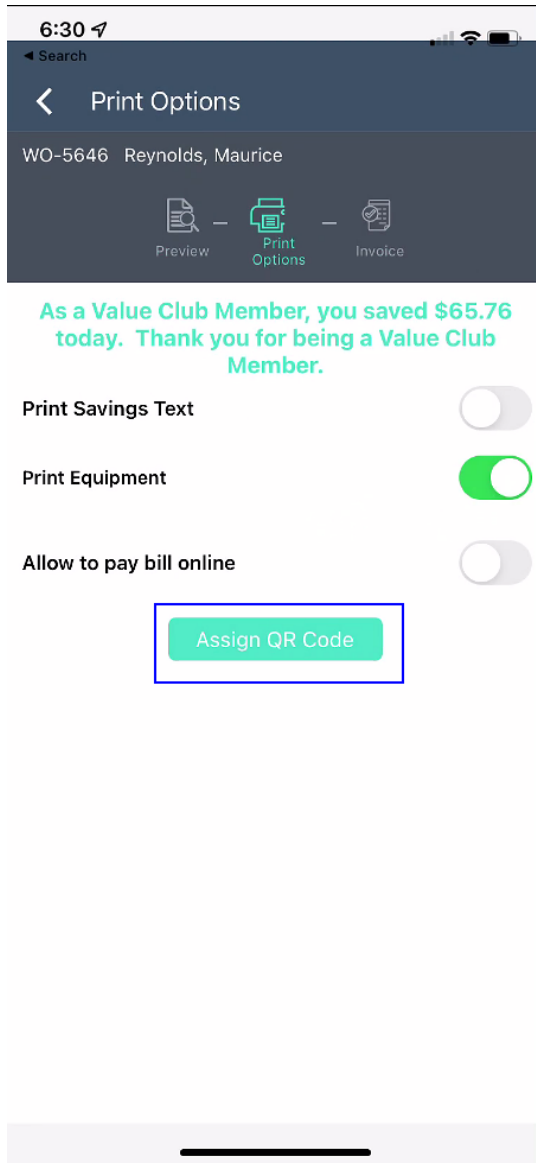
Mobile Settings

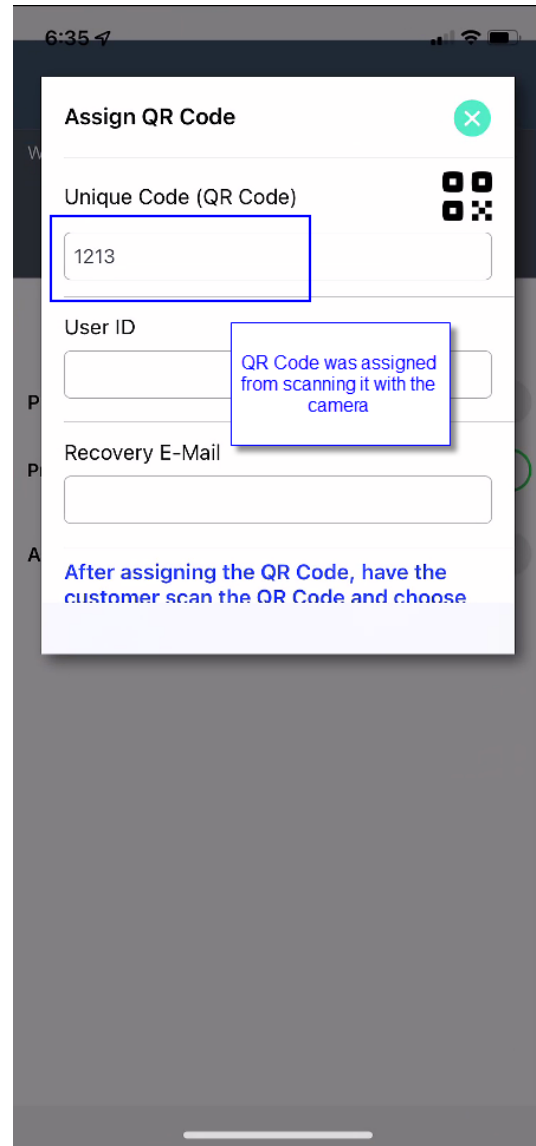
Authorization Text: I have the authority to order the above work and do so order as outlined above It is agreed Acceptance Text: I LIMIT MY WARRANTY. All materials, parts, and equipment are warranted by the

Set the Idle Time Buffer Minutes in the Master Settings. If you want to Disable the Idle Time Buffer, enter 0 (Zero) in the field.

SF Mobile – The Ability to Assign a QR Code from SF Mobile has been added

If you have pre-printed QR Codes for the customer to access the Customer Portal, you can assign the QR code to the customer from the Print Options screen of the Invoice section of the Work Order. The Customer Portal allows the customer to enter a new work order, schedule an inspection, view their history, view their equipment you have recorded on site, pay their bills and request a quote online. When the customer scans the QR Code, a link will be sent to their mobile number or email address that will allow them to automatically login to their Customer Portal. Imagine the customer getting home from work at the end of a long day and realizing that their system is not working and your company has already closed for the evening. By scanning the QR Code, the customer will be able to enter a new Service Call and schedule it at their convenience without ever having to contact you. **NOTE** - To assign the QR Code, you must have the Customer Portal feature enabled on your system. If you do not have the feature enabled, contact ServiceFactor Support and they can enable it for you.



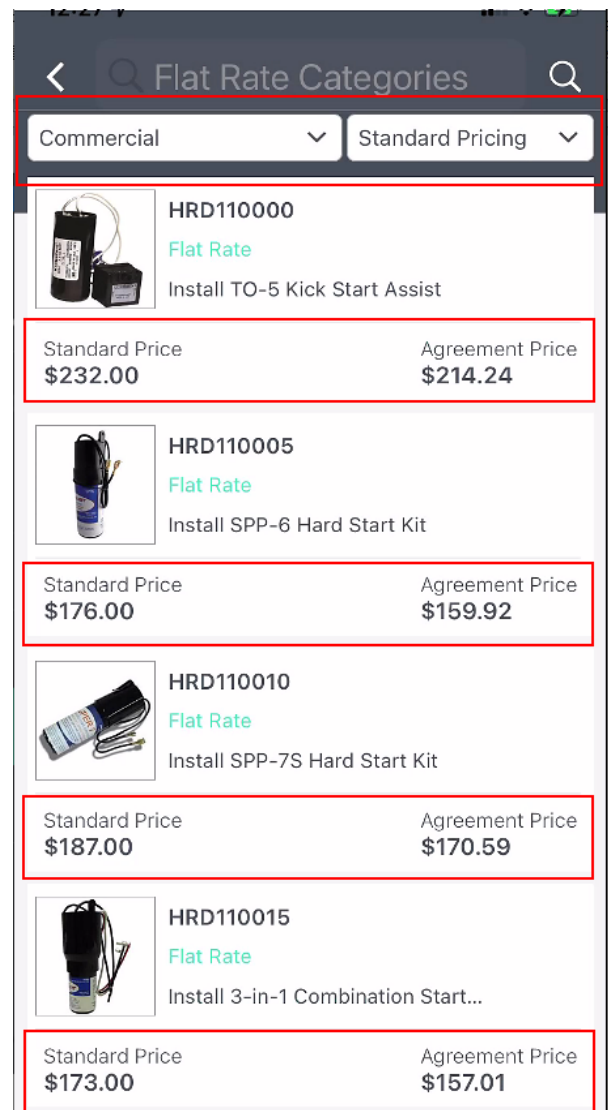
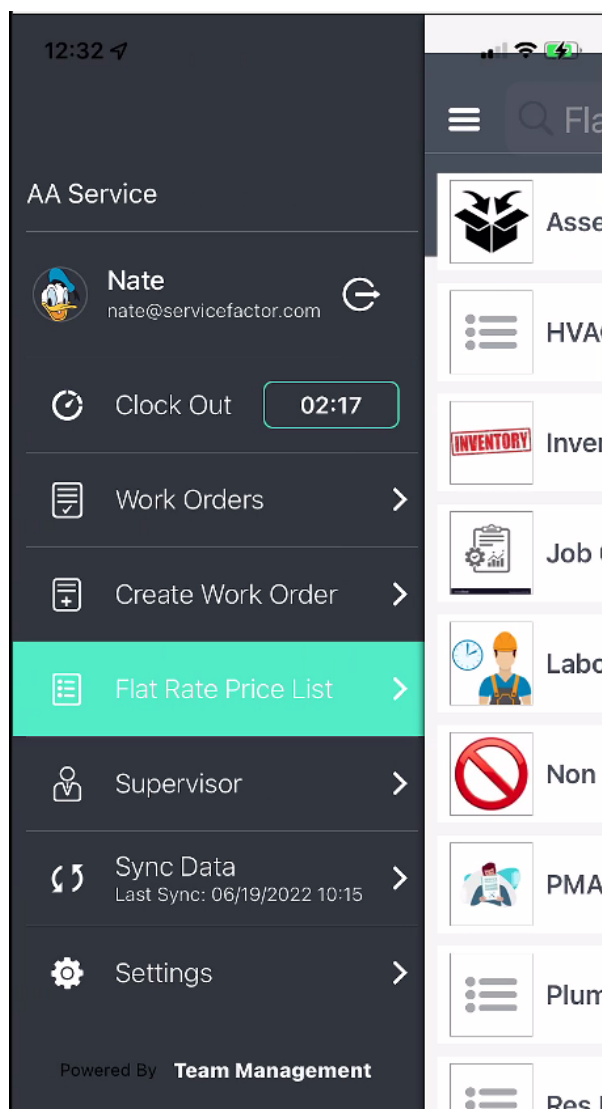


After you have scanned the QR Code, it will appear in the “Unique Code (QR Code)” field. Enter a User ID and a Recovery E-Mail address, and when you save the QR Code to the customer’s record, they can scan the QR Code and receive a text or email taking them to the Customer Portal Login screen. The first time they access the Customer Portal, they will need to use the “Forgot Password” function to assign themselves a password, which will then allow them to login to the Customer Portal. Once they have logged in for the first time on a device, each time they scan the QR Code from the same device, they will be automatically logged in.

For more information about the Customer Portal feature, please contact ServiceFactor Support and they can assist you.

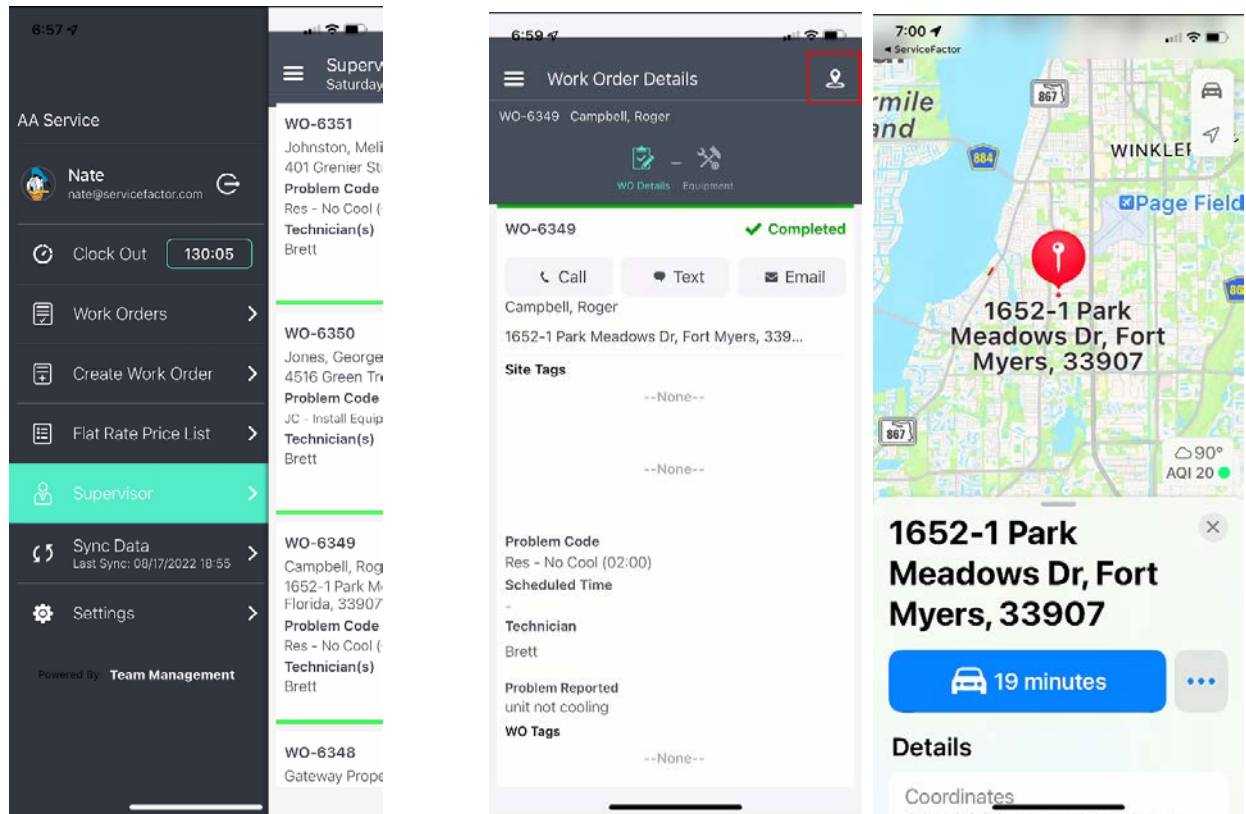
ServiceFactor Mobile – Flat Rate Price Book can now be viewed from the Menu without having to have Mobile Manager Permission

The last update included a new option that allows you to look up Flat Rate prices without having to open a Work Order if the tech was set up as a Mobile Manager. This update has removed the Mobile Manager permission as being a pre-requisite to view the Flat Rate Price Book from SF Mobile. The prices 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 minimizes the need for a printed price book.



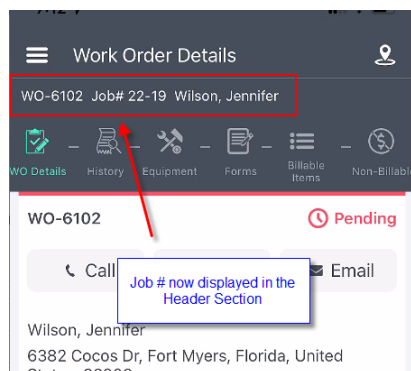
SF Mobile – The WO Details Screen in the Supervisor Section can now access the Map

The Map feature has been added to the WO Details screen in the Supervisor Section of SF Mobile. Prior to this release the Map Feature was only available in the standard Work Order. This will make it easier for Supervisors that visit Work Sites throughout the day to easily bring up turn by turn directions to a particular work order's location.



SF Mobile – The Job Number will now be displayed in the Header for Work Orders associated with a Project Management Job

If a Work Order is associated with a Project Management Job, the Job Number will be displayed in the header next to the WO Number and prior to the Customer's Name on all of the screens in SF Mobile.



SF Mobile – Technicians will be prompted to clock out after their default daily end time

If a technician changes their dispatch status to anything other than Traveling or Working after their normal daily end time, the system will automatically prompt them if they want to Clock Out. This should help to eliminate technicians from forgetting to clock out at the end of the day, or at least serve as a reminder that they need to clock out if they are not quite ready to clock out when prompted.

NOTE – Technician's scheduled work hours are defined in the Employee file

