

SF Release Notes: October 17, 2022

Invoices – Create PO from Invoice

A new feature has been added to the Invoice Screen that will allow you to create a PO from the list of items on the invoice. When you use this feature, the quantity that you enter to create the PO will be reduced from the original line on the invoice and added to a new line from the PO with the same sell price. This feature will be beneficial when items get added to an invoice from a Quote and you want to purchase some of the items on a PO.

NOTE – Only inventory and non-inventory items will be available to be added to the PO from this new feature.

The screenshot displays the SF Invoice screen with a dark navigation bar at the top. The bar contains several menu items: Timeline (Last: 10/17/2022, On Record: 3), Timesheet (Worked: 0.00, Traveling: 0.00), Invoice (Invoiced: \$7,890.91, Balance: \$7,890.91), Payments (Total: \$0.00, Last Paid: None), Quote (Primary: Good, Amount: \$0.00), and Purchase Order (Amount: \$0.00, BTS: \$0.00). Below the navigation bar, the main content area is titled 'Invoice' and includes buttons for Email, Print, and Save. The 'Bill To' section shows 'Amore, Mary' and a 'Profitability Details' button. The 'Bill To Address' is '3408 Custer Rd, Plano, Texas, 75023'. The 'Terms' are 'Due on receipt', 'Invoice Date' is '10/17/2022', and 'Due Date' is '10/17/2022'. The 'Invoice #' is 'F-5679', 'Customer PO #' is empty, 'Sales Rep' is empty, 'Markup' is 'Standard - 110', and 'Class' is empty. The 'Business Entity' is 'Search and select', 'Use Tax' is 'NO', 'Call Back' is 'NO', 'Original Work Order' is 'Search and select', 'Print Savings' is 'NO', 'Print Equipment' is 'YES', and 'Hide Prices' is 'NO'. The 'Invoice Items' section is highlighted in green and contains a table with one item. A red box highlights the 'Create PO From Invoice' button in the top right corner of the items table, with a red arrow pointing to it from a text box that says 'New Create PO From Invoice field has been added to the Invoice screen above the items'.

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
	4TTR6024J	The XR16 home air conditioning system has a SEER rating of up to 17.00,	1.00	2446.20	2446.20	NO		Installation	YES

Create PO From Invoice

Work Order: WO-6495

Select Vendor → Vendor: Johnstone Supply

Move All Selected >>

Selected	Item	Description	Location Qty	PO Qty	PO Cost
<input checked="" type="checkbox"/>	4TTR6024J	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.	0	1.00	1359.00
<input checked="" type="checkbox"/>	TEM8A0B24	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.	0	1.00	795.00
<input checked="" type="checkbox"/>	Lineset3878	50 Feet of 3/8" LL x 7/8" SL x 3/8" Insulated Line Set	0	2.00	225.00
<input type="checkbox"/>	10YRPLWAR	10 Year Parts & Labor Warranty	1.00	0	700.00

Select which items you want to add to the Purchase Order, adjust the quantity and cost (if applicable) and click the Create PO button.

Cancel Create PO

Invoice

Email Print Save

Item	Description	Qty	Unit Price	Total Price	Options	Status
Main	PAD110045 Installation of 36" x 48" 3" Ultralite Condensing Unit Pad	1.00	409.96	409.96	Installation	YES
	10YRPLWAR 10 Year Parts & Labor Warranty	1.00	1400.00	1400.00	Installation	YES
	RT Labor 125 Regular Time Labor @ \$125 per hour	8.00	121.25	970.00	Installation	YES
PO-1063	4TTR6024J The XR16 home air conditioning system has a SEER rating of up to 17.00, making it an excellent choic...	1.00	2446.20	2446.20		YES
PO-1063	TEM8A0B24 The M Series Communicating air handlers combine affordability and flexibility to work with the compl...	1.00	1629.75	1629.75		YES
PO-1063	Lineset3878 50 Feet of 3/8" LL x 7/8" SL x 3/8" Insulated Line Set	2.00	517.50	1035.00		YES

Items from the PO will be adjusted on the Invoice and will now reflect that they are coming from the PO that was created

Quote invoices will verify that the sell price matches the price quoted and warn you if it doesn't

If you adjust the sell price of an invoice that was created from a Quote, the system will now display a notice at the top of the screen indicating that invoice subtotal does not match the quote.

The screenshot shows the 'Invoice' screen with a dark header bar containing navigation icons and data for Timeline, Timesheet, Invoice, Payments, Quote, and Purchase Order. The Invoice section shows 'Invoiced: \$7,918.25' and 'Balance: \$7,918.25'. A red box highlights a warning message: 'Invoice Subtotal does not match quote!'. Below the warning are fields for Bill To (Amore, Mary), Bill To Address (3408 Custer Rd, Plano, Texas, 75023), Terms (Due on receipt), Invoice Date (10/17/2022), and Due Date (10/17/2022). There are also fields for Invoice # (F-5679), Customer PO #, Sales Rep, Markup (Standard - 110), and Class. A table of Invoice Items is visible at the bottom.

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
Main	PAD110045	Installation of 36" x 48" 3" Ultralite Condensing Unit	1.00	409.96	409.96			Installation	YES

Quotes – List Cost and Actual Cost fields have been added to the Quote Screen

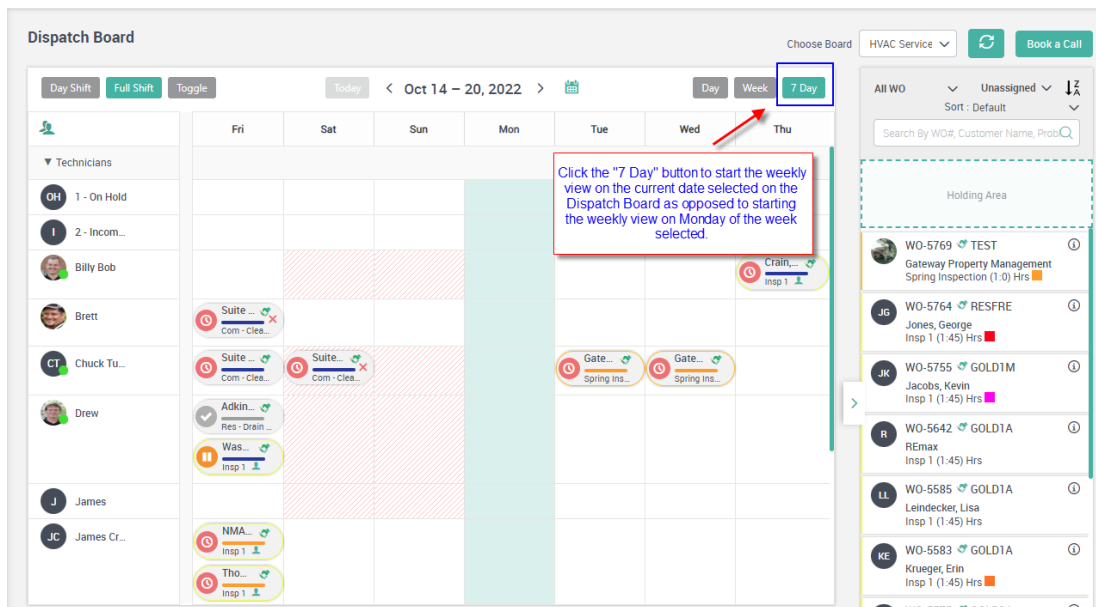
The List Cost and Actual Cost fields have been added to the Quote Screen. Prior to this release, the costs were stored behind the scenes based on the cost assigned to the item. With this release, you can now edit the costs associated with the items if applicable. NOTE – Non Inventory items will only allow you to adjust the “List Cost”, which will be used as the actual cost. Inventory items will allow you to adjust both the “List Cost” and “Actual Cost”. Reminder – List cost is used to calculate the Sell Price based on your markup table.

The screenshot shows the 'Quote' screen with a 'Pending' status. A red box highlights a message: 'List Cost and Actual Cost fields have been added to the'. Below this is a table of Quote Items with new columns for 'List Cost' and 'Actual Cost'.

Item	Description	Qty	List Cost	Actual Cost	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
MOT005	3/4 hp 1075 RPM Cond Mtr	1.00	141.75	126.14	277.13	277.13	YES			YES

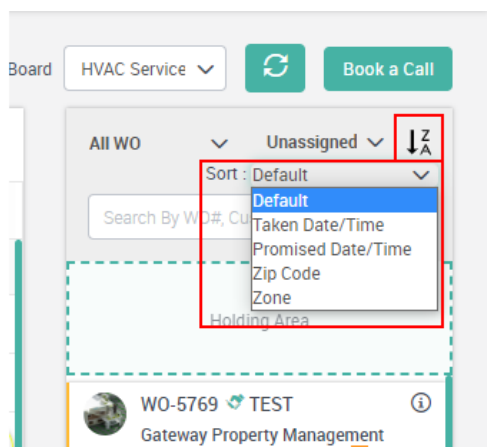
Dispatch Board – New “7 Day” view has been added

A “7 Day” weekly view has been added to the dispatch board. This option is similar to the “Week” view, but it will start the weekly view on the current day selected, as opposed to starting on Monday. This will make it very easy to move scheduled calls from one week to another. For example, if you are unable to get to all of your calls at the end of the week, you can click the “7 Day” button and drag the calls from the current week to the following week to reschedule them. Another example would be if you come in on Monday Morning and look at the prior week and notice that there are scheduled calls that you did not get to, you can change the date on the Dispatch Board to a date in the prior week and drag the calls to the current week.



Dispatch Board – Ability to Sort the Unassigned Column

A new option has been added to the Unassigned Column on the Dispatch board that will allow you to sort the unassigned calls by “Taken Date and Time”, “Promised Date and Time”, “Zip Code” or “Zone”. You can also choose if you want to sort the column from “lowest to highest”, or “highest to lowest” (or “A – Z” or “Z – A”, depending on the Sort option selected).



Dispatch Board – Ability to sort the Bottom Grid

Sort options have been added to each column of the bottom grid on the Dispatch Board. Simply click the header in the column for which you want to sort the grid. NOTE – Clicking the first time will sort from “Lowest to Highest”. Clicking a second time will sort from “Highest to Lowest”.

The screenshot shows the Dispatch Board interface. At the top, there's a user profile for 'Drew' and a search bar. Below that, there are tabs for 'All Work Orders', 'Assigned', 'Unassigned', 'Completed', 'Posted', and 'Canceled'. A search bar is also present with the text 'Search By WO#, Customer ...'. The main table has the following columns: WO #, Technician, Customer Name, Promised Appointment, Created Date, Task and Duration, and Scheduled Date. The table contains several rows of work order data. To the right, there's a sidebar showing details for a specific work order, including the technician's name and the task duration.

WO #	Technician	Customer Name	Promised Appointment	Created Date	Task and Duration	Scheduled Date
WO-6495	Nate	Amore, Mary	10/17/2022 10:00 AM - 12:00 PM	10/17/2022 06:22 AM	Res - Replacement (06:00) Hrs	10/17/2022
WO-6483	Brett	Trompo Taqueria Plano	10/12/2022 09:00 AM - 11:00 AM	10/05/2022 02:47 PM	Insp 1 (01:45) Hrs	10/12/2022
WO-6482	Robert McDonalds	Bass, Denise	-	10/04/2022 10:23 AM	Res - Clean & Check (01:30) Hrs	10/07/2022
WO-6482	Drew	Bass, Denise	-	10/04/2022 10:23	Res - Clean & Check	10/04/2022

Dispatch Board – Now distinguishes between a work order that has a “Dispatch Status” of completed but the “Invoice Status” is not Completed

A new Yellow Check Mark indicator has been added to the Work Order card on the dispatch board that shows that the “Dispatch Status” is completed, but the “Invoice Status” is not completed. This will allow the office to quickly see which Calls with a Dispatch Status of “Completed” still need to have their “Invoice Status” changed from “Assigned” to “Completed”. If the Check Mark indicator is Green”, it indicates that the Dispatch Status and Invoice Status are both “Completed” and the invoice should be ready to Post to Accounting. NOTE – Once the invoice has been posted to accounting, the color of the check mark changes to grey.

The screenshot shows a calendar view of the Dispatch Board for October 10, 2022, Monday. The calendar has columns for 9 AM, 10 AM, 11 AM, and 12 PM. There are three work order cards visible: 'Baskin Robins' with a green check mark, 'Strong, Roger 1234' with a yellow check mark, and 'Campbell, Roger' with a grey check mark. Callouts explain the meaning of each check mark color: a green check mark indicates both Dispatch and Invoice status are completed; a yellow check mark indicates Dispatch status is completed but Invoice status is not; and a grey check mark indicates the invoice has been posted to accounting.

Dispatch Board – Timeline Entry has been enhanced

The Timeline Entry created from re-assigning the call from a technician will now show you the details of the re-assignment and allow you to drill into the Dispatch Board to the scheduled date. For example, if you move the call from one time to another, the timeline will show you from whom and what time the call was originally assigned and to whom and the new time that the call has been scheduled. Some typical timeline entries will look as follows:

Work order WO-1234 was re-assigned from Brett 10/14/2022 to James [10/17/2022 09:00 AM](#)

Work order WO-1234 was copied to Brett [10/14/2022 08:00 AM](#)

Work order WO-1234 was assigned to Mike [10/14/2022 08:00 AM](#)

Work order WO-1234 was re-assigned from Joe 10/13/2022 02:00 PM to Unassigned

Clicking on the hyperlink will take you to the Dispatch Board on the displayed date.

The screenshot displays a software interface with a dark navigation bar at the top containing icons and labels for 'Timeline', 'Timesheet', 'Invoice', 'Payments', 'Quote', and 'Purchase Order'. Below the navigation bar, there is a section for the year '2022' with a dropdown arrow, an 'Add Note' button, and a 'Keyword Search' input field. The main content area features a vertical timeline with entries for the dates 10/17/2022, 10/14/2022, and 10/15/2022. Each entry includes a technician's profile picture and name, followed by a description of the work order action and a timestamped hyperlink. For example, on 10/17/2022 at 07:55 AM, Nate re-assigned work order WO-5714 from Brett to James, with a link to '10/17/2022 09:00 AM'. On 10/14/2022 at 12:08 PM, William copied work order WO-5714 to Chuck Tuttle and assigned it to Chuck Tuttle, with links to '10/15/2022 08:00 AM' and '10/14/2022 12:15 PM'. To the right of the timeline is an 'Attachments(0)' section with an input field for 'Enter Description' and a 'No records found.' message.

Dispatch Board Settings – “Work Order” type has been added to the Dispatch Board Settings file

You can now define what Work Order type you want to be displayed by default in the Un-assigned column based on the Dispatch Board selected. For example, you might define a “Project Management” Dispatch Board, which displays just your Job Cost technicians. When you choose that Dispatch Board from the Drop Down at the top of the Dispatch Board, you might want the Un-assigned column to display only Project Management work orders, instead of “All” work orders. By assigning the Work Order type in the Dispatch Board file in Settings, you can control this.

Project Management – Change Orders – an option has been added allowing you to not create a work order for change orders

A new toggle has been added to change orders that will allow you to have a change order without having to create a Work Order. Many times when working on a Project Management job, change orders will come up that get completed on the fly, and do not get entered until after the fact. Or the Change Order might be created to reflect a price adjustment that doesn't require a technician to be dispatched or items to be added to accomplish the Change Orders. In situations such as these, you can elect to not create a Work Order for the Change Order.

The screenshot displays the 'New 5 Ton System' job details in a software interface. At the top, there are navigation tabs for Timeline, Job Info, Phases, Billing, Work Orders, and Purchase Order. The main content area shows the job details for 'New 5 Ton System' (Job #: 22-23). A 'Change Order' button is highlighted with a red box. Below this, there are several input fields and a 'Create Work Order' toggle, which is also highlighted with a red box and set to 'NO'. The toggle is located next to the 'Create Work Order' label. Other fields include Status (Pending), Markup (Standard - 110), Class (Installation), Problem Code (JC - Change Order), Business Entity (Installation), Estimated Start Date (10/17/2022), Estimated End Date (10/18/2022), Grouping (Search and select), Approval Date (10/17/2022), Change Order # (2), Item (Change Order), Description (Install ODU at back of house instead of the side of house), and Sell Price (450.00). There is also a 'Use Tax' checkbox and a 'Tax' checkbox at the bottom.

Project Management – Job Info Screen – You can now change the “Class” on the Job after it has been accepted

If you forget to add a class to a Job, or you want to change the class after the job has been accepted, you can now change the class in the Job Info screen. This will use the new class for any new Change Orders added to the job.

NOTE – If you have a “Class” assigned to the Problem Code selected when creating the Work Order, the system will use the Class assigned to the Problem Code. If you want the system to use the Class assigned to the Job, be sure to select a Problem Code that does not have a “Class” assigned to it.

Items – A new “Last Used” field has been added to all item types

A new field has been added to the “Item” file that shows the date that an item was last used in the system, whether it is on a quote, an invoice or a job. This field can be used to help determine if you need to retire a specific item due to not being used in a while.

NOTE – Since this is a new field, it will be blank until the next time you use the item on a record.

Items – Inventory Items – “Last Inventory PO #” and “Last Received Date” fields have been added to Inventory Items.

2 new fields have been added to the Inventory Item file that track the last inventory purchase order number on which the item was purchased and the date the item was last received into inventory.

NOTE – Since these are new fields, they will be blank until you issue a new Inventory PO and/or receive the item.

View Item - Inventory Edit

Item Information

Type: Inventory


Item Name/Number: MOT0025

Category: Inventory.01 HVAC:Motors:Condenser Mot...

Manufacturer's Part Number: 1368704473284

Last Used Date: 10/17/2022

Allow Price Edit on Mobile

 .jpg, .jpeg, .bmp, .png only, max 2MB

ACTIVE

Inventory informations

14 LOCATIONS | 10.00 QTY AVAILABLE | MANAGE INVENTORY

Asset Account: Inventory Asset | Total Quantity: 10.00

Purchasing informations

Cost: 86.6250 | Cogs Account: Cost of Goods Sold | Preferred Vendor: Johnstone Supply

Cost Type: Material | Weighted Average Cost: 82.0000 | Last Cost: 82.0000


Price Type: Fixed Markup

Mark up: Special - 120


Last Inventory PO #: PO-1066 | Last Received Date: 10/17/2022

Purchase Information: U.S. Motors 3323

Upgraded Items(1)

 MOT005

Recommended Items(1)

 CAP005

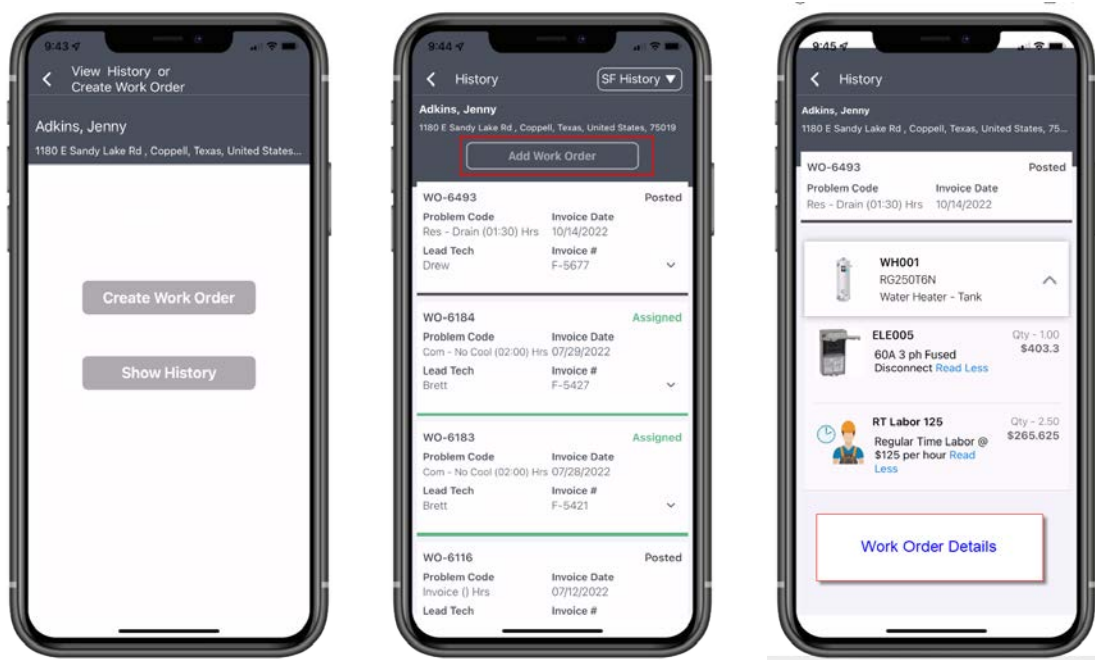
Popup Announcements – A “Remind me Later” and “Mark as Read” option has been incorporated into the Announcements

The popup announcements now have a “Remind me Later” option that will “Snooze” the announcement so that you can read it later. If you choose this option, the announcement will “snooze” for 5 minutes and then re-appear the next time you click on a menu option. Once you have read the announcement, you can click the “Mark as Read” option so that it will not appear again in the future. This feature will be helpful if you are in the middle of something and do not have time to read the announcement when it appears.



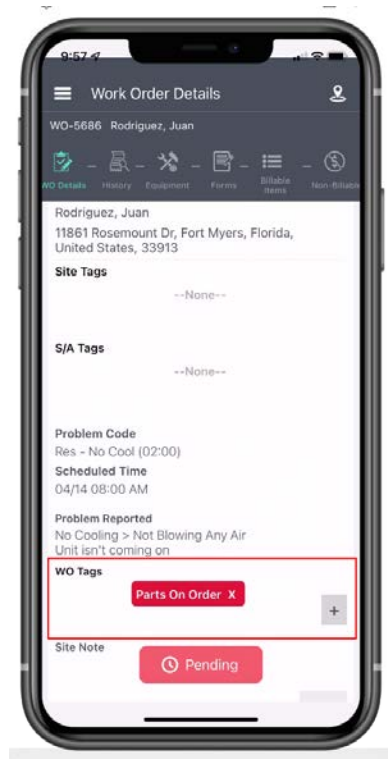
ServiceFactor Mobile – You can now view Customer History without having to add a Work Order

Technicians with Full user permissions can now view customer history without having to add a Work Order. The “Create Work Order” menu option has been changed to “View History or Create Work Order”. When the tech chooses this option, they can search for the customer and will have the option to Create Work Order or Show History. If they elect to Show History, the customer’s history will be displayed. After viewing the history, the tech can choose to create a Work Order if needed.



ServiceFactor Mobile – Techs can now Add or Delete Work Order Tags

Technicians can now add or delete work order tags directly from SF Mobile. This gives the technician more control of tags and will enable them to add important tags or delete existing tags once the tag has been addressed. For example, they might add a tag of “Parts on Order” to the work order. Once the parts have arrived, the office might change the tag to “Parts Received”. When the tech goes back to the call, s/he can delete the tag so that it will no longer show up as “Parts Received” when reports are ran or filters are enacted for that tag in the future.



ServiceFactor Mobile – System can optionally automatically clock technician out at 11:59 PM if the tech forgets to clock out

You now have the option to have the system automatically clock a technician out at 11:59 PM if the technician forgets to clock themselves out at the end of the day. This will make it easy for the payroll clerk to see when a tech has forgotten to clock out on a particular day and can contact the technician to correct the time. NOTE – If a technician is in a Traveling or Working status at 11:59 PM, the system will not clock them out. This feature needs to be activated in the Employee file in the Mobile Accessibility section for each technician whom you want the system to “Clock Out Automatically”.

