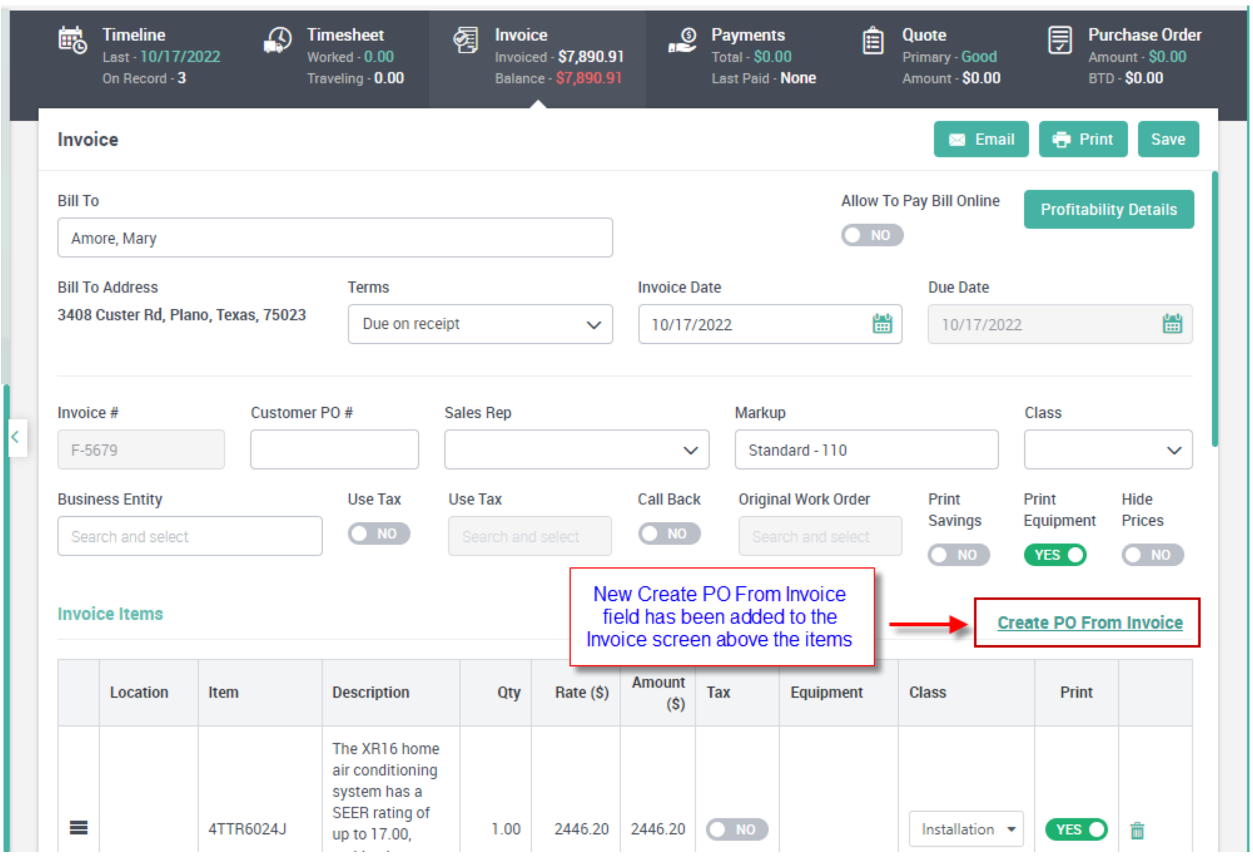
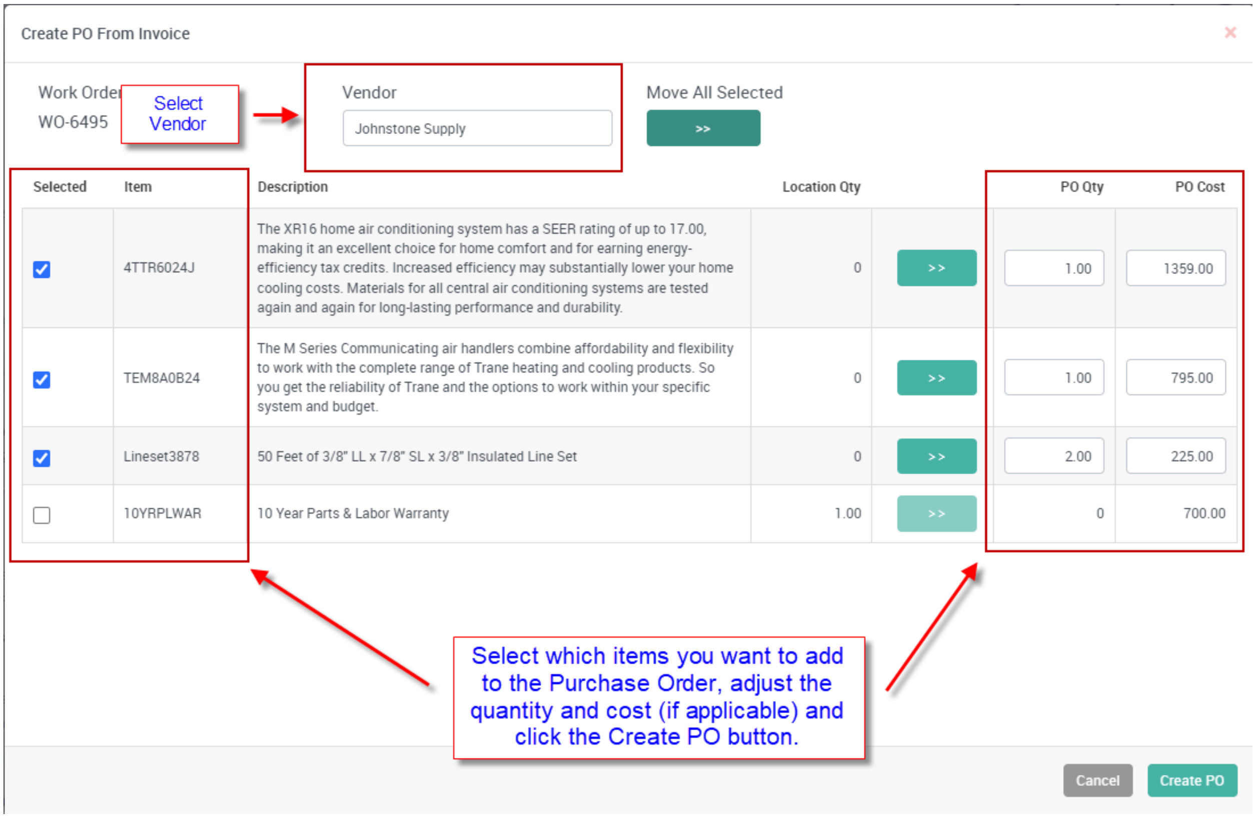
SF Release Notes: October 17, 2022

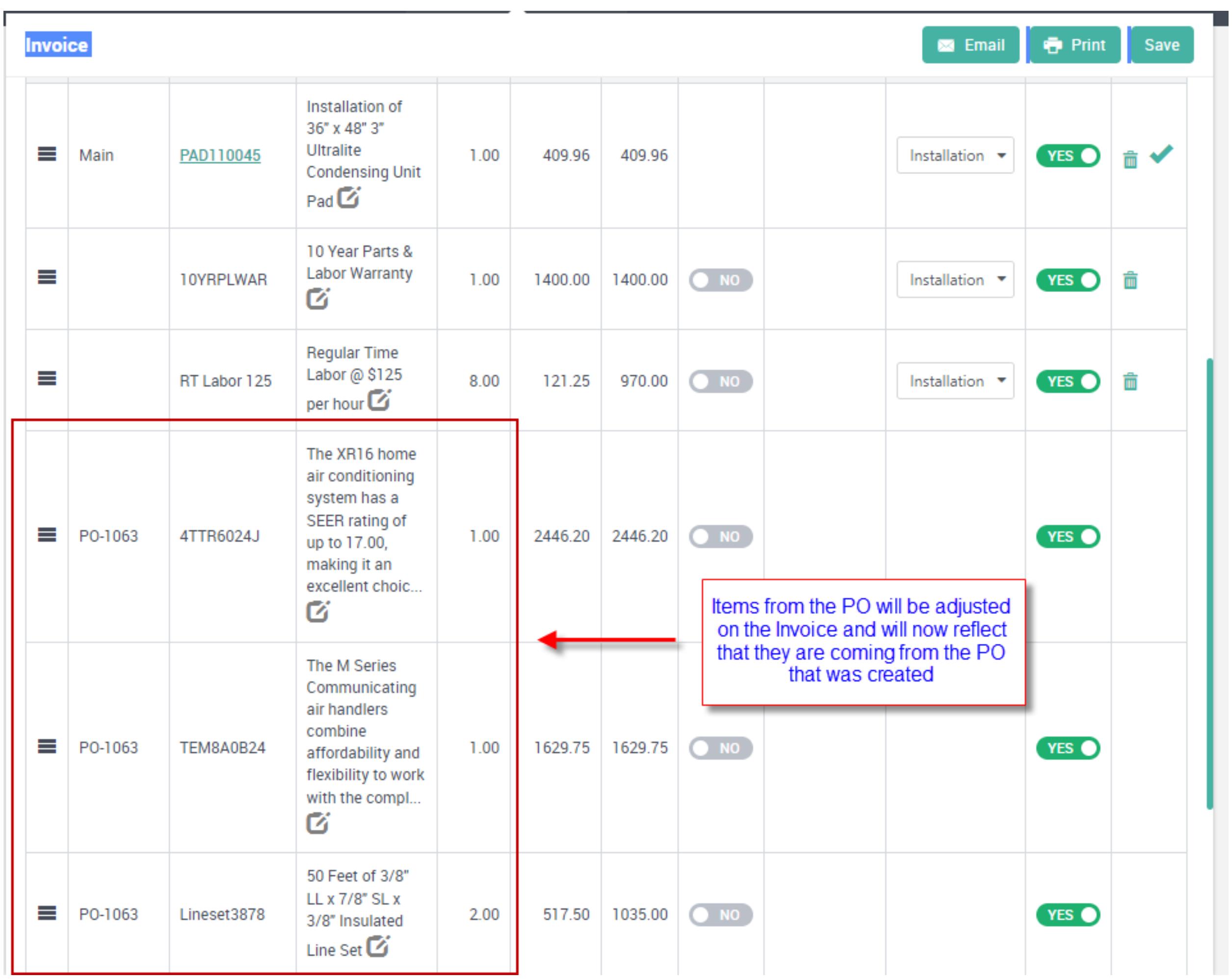
Invoices – Create PO from Invoice

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.

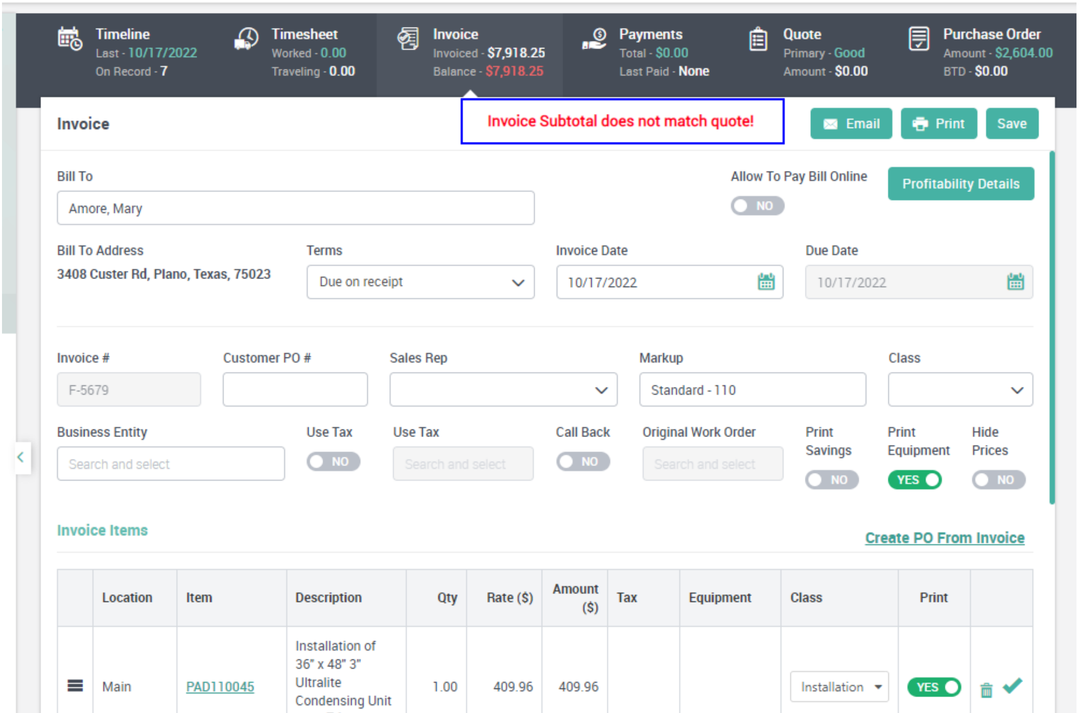



Create PO From Invoice
Work Order
WO-6495
Select Vendor
Vendor
Johnstone Supply
Move All Selected
>>
Selected
Item
Description
Location Qty
PO Qty
PO Cost
4TTR6024J
The XR16 home air conditioning system has a SEER rating of up to 17.00, making it an excellent choice for home comfort and for earning energy-efficiency 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
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
Lineset3878
50 Feet of 3/8" LL x 7/8" SL x 3/8" Insulated Line Set
0
2.00
225.00
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
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
NO
Installation
YES
RT Labor 125
Regular Time Labor @ $125 per hour
8.00
121.25
970.00
NO
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
NO
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
NO
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
NO
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

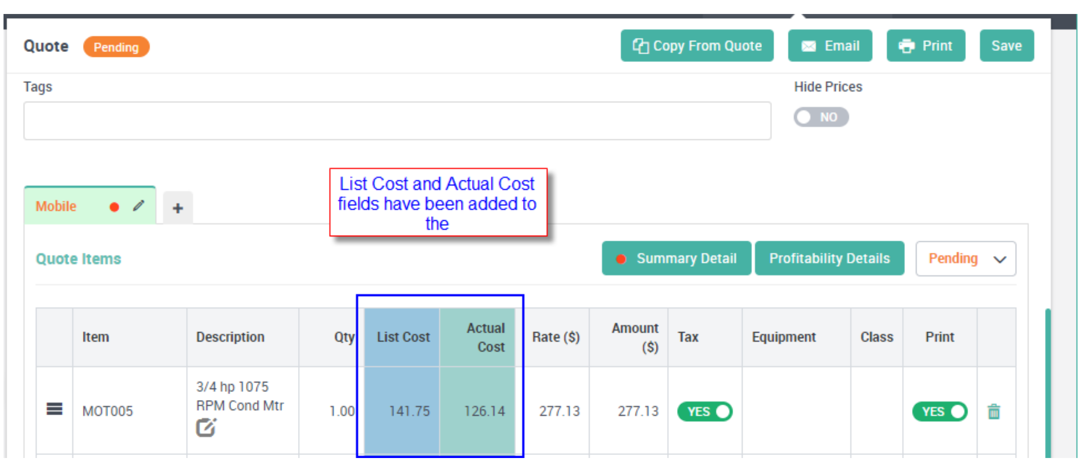
Quote invoices will verify that the sell price matches the price quoted and warn you if it doesn’t

If you ajdust 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.



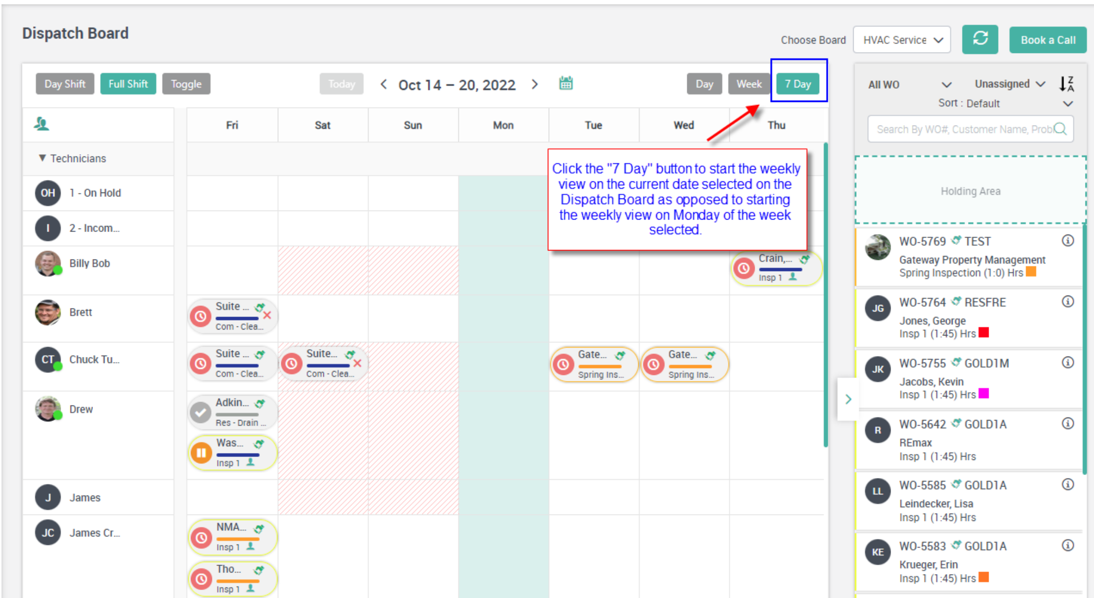
Quotes – List Cost and Actual Cost fields have been added to the Quote Screen

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.



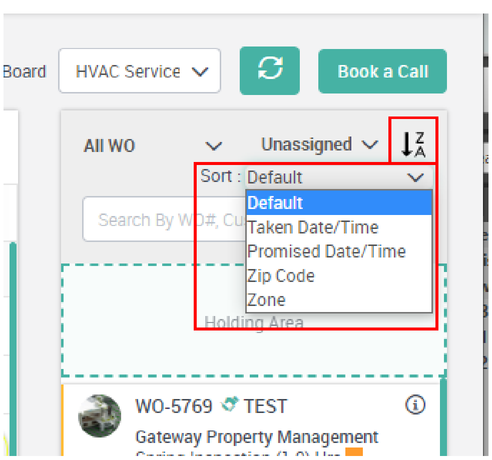
Dispatch Board – New “7 Day” view has been added

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.



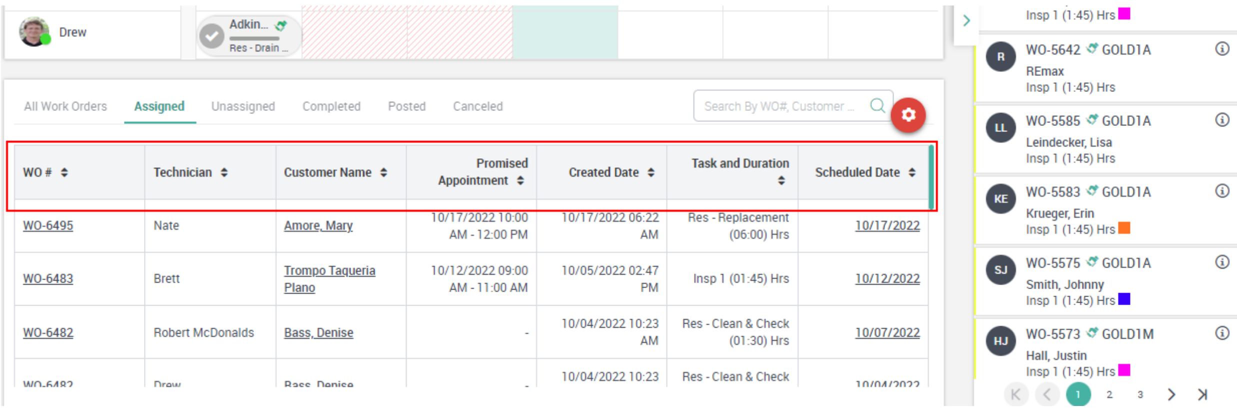
Dispatch Board – Ability to Sort the Unassigned Column

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).



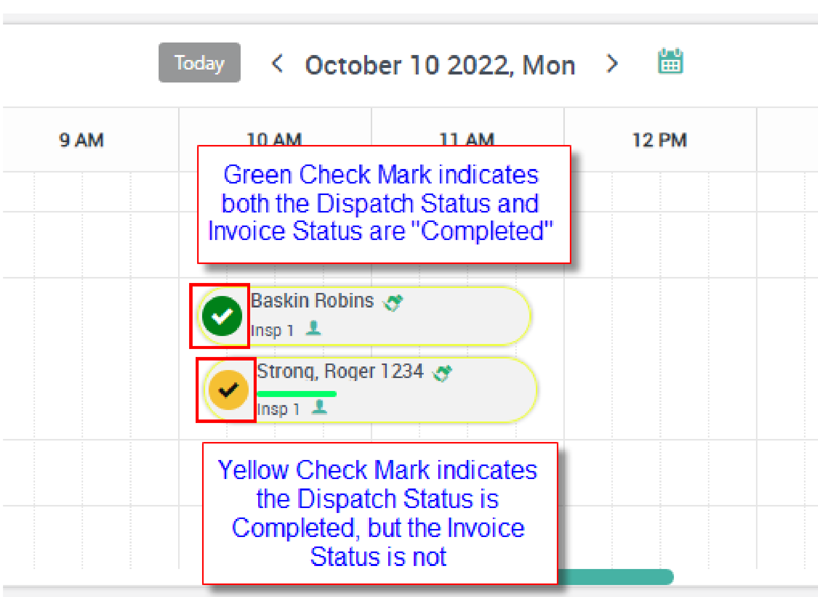
Dispatch Board – Ability to sort the Bottom Grid

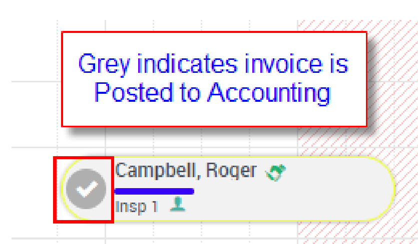
Sort options have been added to each column of the bottom grid on the Dispatch Board. Simply click the header in the column for which you want to sort the grid. NOTE – Clicking the first time will sort from “Lowest to Highest”. Clicking a second time will sort from “Highest to Lowest”.



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.



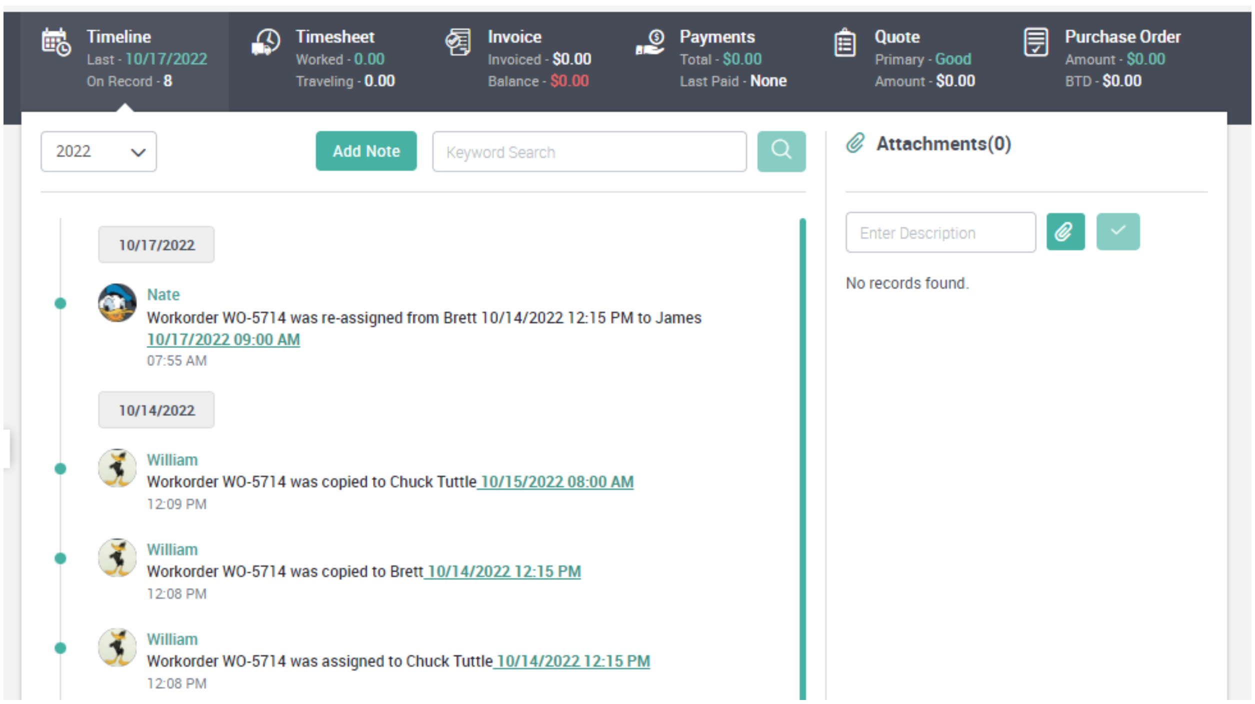


Dispatch Board – Timeline Entry has been enhanced

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.

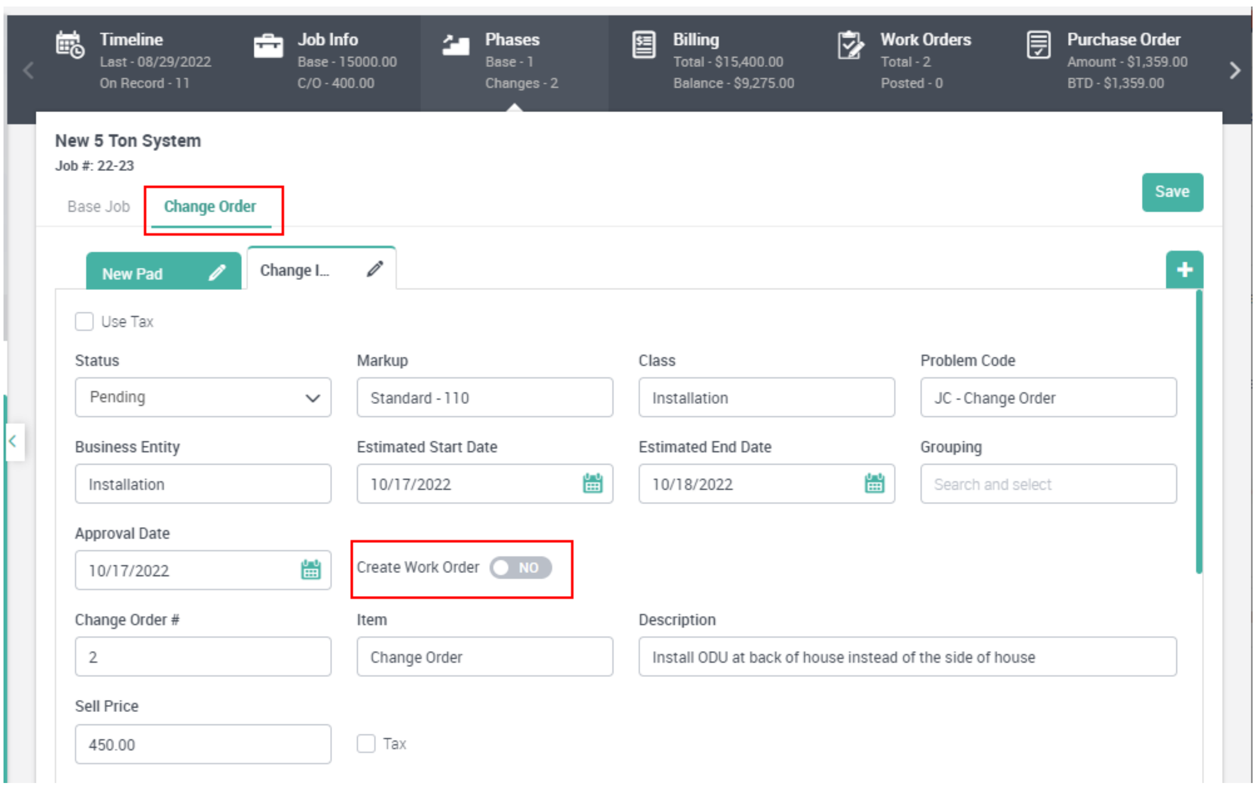


Dispatch Board Settings – "Work Order" type has been added to the Dispatch Board Settings file

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.



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

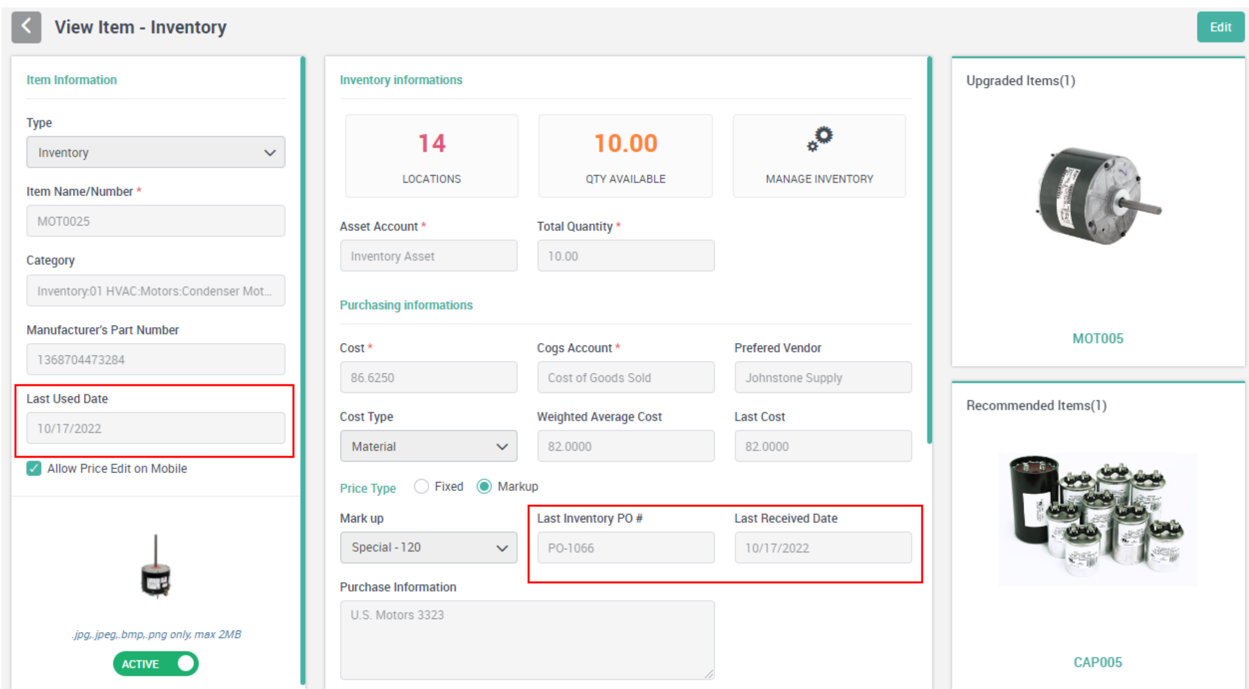
A new field has been added to the “Item” file that shows the date that an item was last used in the system, whether it is on a quote, an invoice or a job. This field can be used to help determine if you need to retire a specific item due to not being used in a while.

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.

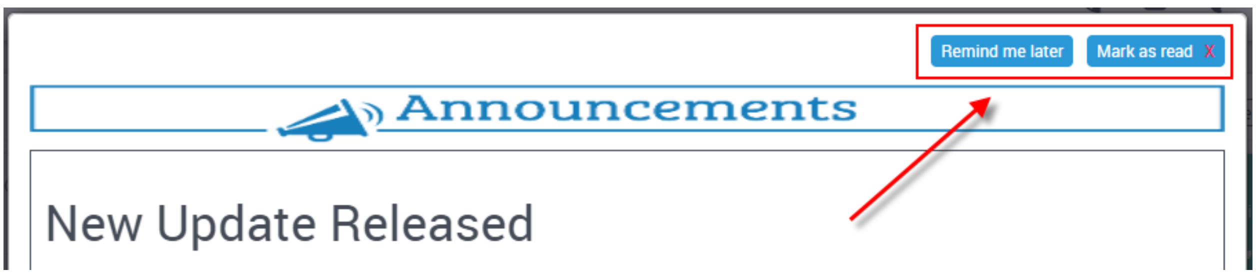
2 new fields have been added to the Inventory Item file that track the last inventory purchase order number on which the item was purchased and the date the item was last received into inventory.

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



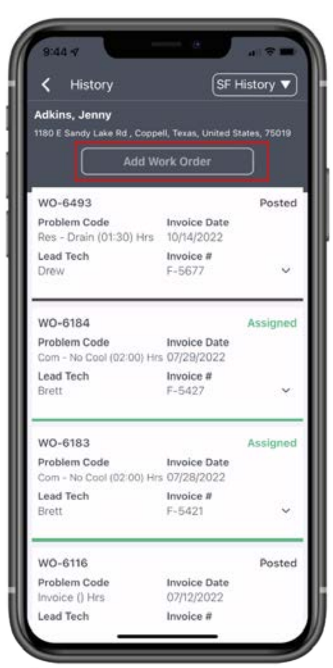
Popup Announcements – A "Remind me Later" and "Marke as Read" option has been incorporated into the Announcements

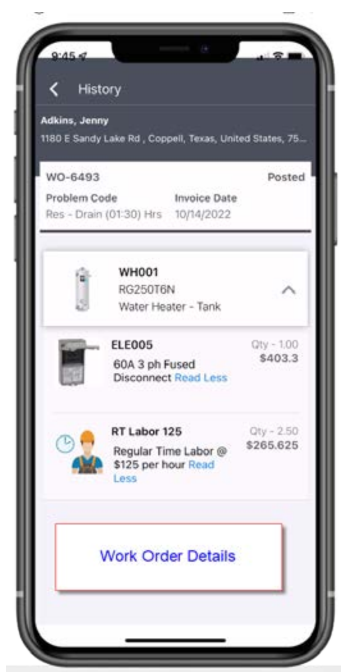
The popup announcements now have a "Remind me Later" option that will "Snooze" the announcement so that you can read it later. If you choose this option, the announcement will "snooze" for 5 minutes and then re-appear the next time you click on a menu option. Once you have read the announcement, you 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

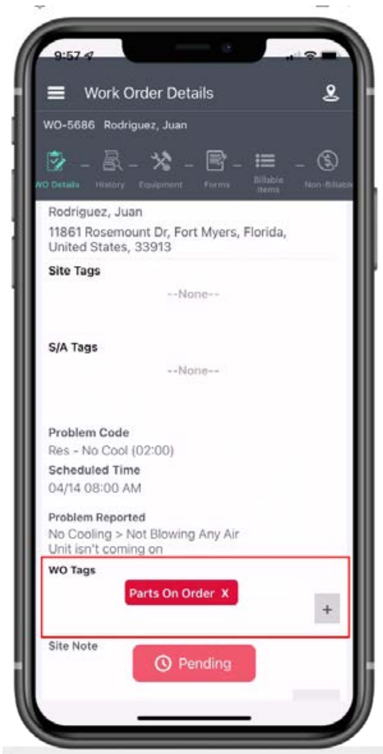
Technicians with Full user permissions can now view customer history without having to add a Work Order. The "Create Work Order" menu option has been changed to "View History or Create Work Order". When the tech chooses this option, they can search for the customer and will have the option to Create 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".