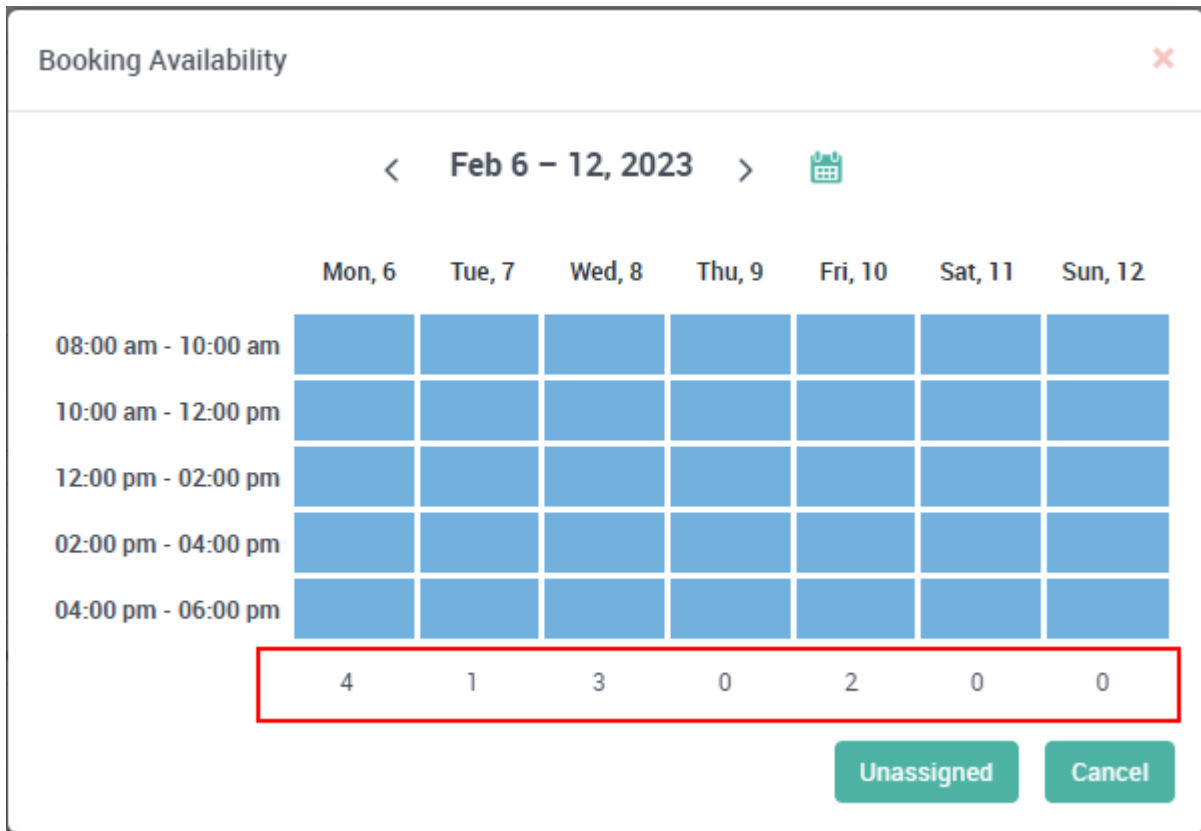


# SF Release Notes: February 7, 2023

## Number of Calls in Zone will be displayed on the Scheduling Screen

When scheduling a Work Order, the number of calls you have in the same zone as the call you are scheduling will be displayed at the bottom of each day's scheduling blocks. This will allow you to quickly see what dates you have calls in the same zone to better maximize efficiency.

In the image below, you will notice you have 4 calls booked in the zone on Monday, 1 on Tuesday, 3 on Wednesday, 0 on Thursday and 2 on Friday.



## When adding a Work Order for a customer that has a Service Agreement, you now have the option to not associate the call with their Service Agreement

In some cases, you may not want to extend a service agreement discount to certain types of calls. For example, you might work in multiple trades, such as HVAC and Plumbing, but the customer only has an HVAC service agreement. If the customer places a Plumbing call, you might not want them to receive a Service Agreement discount since they do not have a Plumbing agreement. You now have the option to choose "N/A" for the Service Agreement. If you choose N/A, the system will not give a discount for work performed. NOTE – if the customer only has 1 Service Agreement, the system will automatically populate the Service Agreement field with their Service

Agreement, but you can manually change it to N/A. If the customer has multiple Service Agreements, you will be required to select the appropriate Service Agreement, or N/A.

The screenshot shows the 'Create Workorder' interface. On the left, there's a profile card for 'Moss, Mike' with contact information and a 'Work Order' button. The main form includes fields for Name/Description, Mobile, Phone, Email, Problem Code, Class, Estimated Time, Priority, Lead Source, Existing Customer, Service Agreement (highlighted with a red box and arrow), Business Entity, Quote Number, Zone, Color, Problem Reported, Site Notes, Sales Person, Change Bill To, PO Number, and Markup.

## You now have the option to “Skip” an Invoice when using the Quick Post feature

If you are using the Quick Post feature and you want to skip a particular invoice from being included in the Quick Post, but you do not want to “Remove” it from the list, you can enter a check mark in the “Skip” check box. This will post all the other invoices in the list, but not the ones marked to Skip. When you go back into the Quick Post list, the invoices you skipped will still be there, but will no longer be checked.

The screenshot shows the 'Quick Post Invoices' interface. It includes filter fields for Invoice Start Date, Invoice End Date, Technician, Sales Rep, Invoice Type, Resolution Status, Business Entity, Class, Search Text, and Invoice Only Invoices. Below is a table with columns: WO #, Site Name, Site Address, Invoice #, Invoice Date, Total, Balance, GP%, Technician, Business Entity, Skip, Action, and Quick Post. A red box highlights the 'Skip' checkbox for the first invoice, which is checked. A callout box says 'Use the "Skip" option to temporarily skip an invoice from posting'.

WO #	Site Name	Site Address	Invoice #	Invoice Date	Total	Balance	GP%	Technician	Business Entity	Skip	Action	Quick Post
	Anderson, John	7401 Alma Dr	A-6054	02/03/2023	\$95.00	\$95.00	100.00%		Res Maintenance	<input checked="" type="checkbox"/>		Remove
	Thomas, Jeff	45136 Green Tree	A-6055	02/03/2023	\$190.00	\$190.00	100.00%			<input type="checkbox"/>		Remove

## Invoice Screen – Sliders have been moved so that they are grouped together on a single line

The “Allow to Pay Bill Online”, “Print Equipment” and “Hide Prices” sliders have been moved to just above the list of Invoice Items.

The screenshot shows the Invoice Screen interface. At the top, there are four summary cards: Timeline (Last: 02/03/2023, On Record: 1), Invoice (Invoiced: \$95.00, Balance: \$95.00), Payments (Total: \$0.00, Last Paid: None), and Purchase Order (Amount: \$0.00, LTD: \$0.00). Below these are buttons for Email, Print, Change Status, and Save. The main form contains fields for Bill To (Anderson, John), Bill To Address (7401 Alma Dr, Plano, Texas, 75025), Terms (Due on receipt), Invoice Date (02/03/2023), and Due Date (02/03/2023). There are also dropdowns for Invoice # (A-6054), Customer PO #, Sales Rep (Nate), Markup (Standard - 110), and Class (Residential). Below these are sections for Business Entity (Res Maintenance), Use Tax (NO), Call Back (NO), and Original Work Order. A red box highlights four sliders: Allow To Pay Bill Online (NO), Hide from Customer Portal (NO), Print Equipment (YES), and Hide Prices (NO). Below the sliders is the Invoice Items table.

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
	PMA 5 Monthly	PMA 5 Systems Monthly Billing	1.00	90.00	90.00	NO		Residential	YES

## Invoice Screen – You can now hide an invoice from appearing in the “Customer Portal”

A new “Hide from Customer Portal” slider has been added to the Invoice Screen that will hide the invoice from being displayed in the Customer Portal. This will allow you to not display certain invoices to a customer, such as if you made a mistake on an invoice, voided an invoice, or if you just don’t want the customer to see a particular invoice in their Customer Portal.

The “Hide from Customer Portal” slider is grouped with the other sliders and is located just above the “Invoice Items”.

This close-up shows the four sliders mentioned in the text. The sliders are: Allow To Pay Bill Online (NO), Hide from Customer Portal (YES), Print Equipment (YES), and Hide Prices (NO). The Hide from Customer Portal slider is highlighted with a red box.

Invoice Items

# Inventory – A “Bin Location” field has been added to the “Manage Inventory” screen.

The Bin Location will allow you to track where the part is located in your various locations. You can view the location from the actual inventory item screen itself, or by clicking the “Qty” link in the Item Listing screen. There also an option to print the Bin Location on the Physical Stock Report.

Inventory Distribution - CAP064

Location	Qty Available	Qty Committed	Reorder Point	Optimal Quantity	Bin Location	On Order	PO Committed	Receiving Committed
Main	2.00	2	0	0	Aisle 3, Shelf 2, Bin 4	11	0	3
Truck 104	3	0	0	4	Bin 12	0	0	0
Truck 100	2	0	0	4	Bin 12	0	0	0

Search and select

Done

Items (2793)

Click the Quantity to view the Bin Location

Name	Sales Description	Category	Price	Item Type	Qty Available	Reorder Point	On Order	Status	Actions
CAP064	50+5 Mfd 440V Dual Capacitor	Inventory	\$ 150.00	Inventory	7.00	●	11.00	Active	View
FIL124	20x25x1 Electrostatic Filter		\$ 131.88	Inventory	3.00	●	10.00	Active	View

Items (2793)

Inventory Distribution - CAP064

Location	Bin Location	Qty Available	Qty Committed	Reorder Point	Optimal Quantity	On Order	PO Committed	Receiving Committed
Main	Aisle 3, Shelf 2, Bin 4	2.00	2.00	0.00	0.00	11.00	0.00	3.00
Truck 104	Bin 12	3.00	0.00	0.00	4.00	0.00	0.00	0.00
Truck 100	Bin 12	2.00	0.00	0.00	4.00	0.00	0.00	0.00

Close

Sunday, February 5, 2023

Physical Stock Report

Location = All Locations

Item Name/Number	Description	Preferred Vendor	Location	Physical Count
CAP064	50+5 Mfd 440V Dual Capacitor		Truck 104	_____
CAP064	50+5 Mfd 440V Dual Capacitor		Bin 12	_____
CAP064	50+5 Mfd 440V Dual Capacitor		Truck 100	_____
CAP064	50+5 Mfd 440V Dual Capacitor		Bin 12	_____
CAP064	50+5 Mfd 440V Dual Capacitor		Main	_____
CAP064	50+5 Mfd 440V Dual Capacitor		Aisle 3, Shelf 2, Bin 4	_____

## Items Screen – A “Print” slider has been added to the Items

A new “Print” slider has been added to the Items screen that will allow you to define if you want the Item to print or not on the invoice. The item will appear on the invoice screen, but the “Print” slider will be set based on how you have set the slider in the Item screen. The slider can be overridden on the Invoice screen. For example, if you are using deferred income, you might want to set the slider for printing the Income and Liability items to “No” so that the positive and negative values do not print on the Inspection Work Order Invoice.

Item Information

Type: Service

Item Name/Number: Deferred Income - Liability

Category: Search and select

Last Used Date

Print on Invoice/Quote?  YES  NO

Allow Price Edit on Mobile

Service Charge: 0.00

Income Account: PrePaid Maintenance

Cost Type: Material

Discards:  Apply S/A Discount  Do Not Apply S/A Discount

Sales Information: Deferred Income - Liability

URL: Description: Add

## Equipment Tab in Customer Center now has the ability to Sort by the various columns

Sort options have been added to the Equipment List in the Equipment Tab of the Customer Center that will allow you to sort the various columns. To sort by a specific column, click the column header.

Timeline: Last - 01/30/2023, On Record - 133

Work Orders: Open - 11, Completed - 17

Equipment: Total - 6

Agreements: Active - 1, Total - 3

Invoice: Invoiced - \$31,133.69, Balance - \$6,669.15

Quotes: Total - 5

Job: Total - 2, Open - 2

Equipment

Hide Inactive:  NO

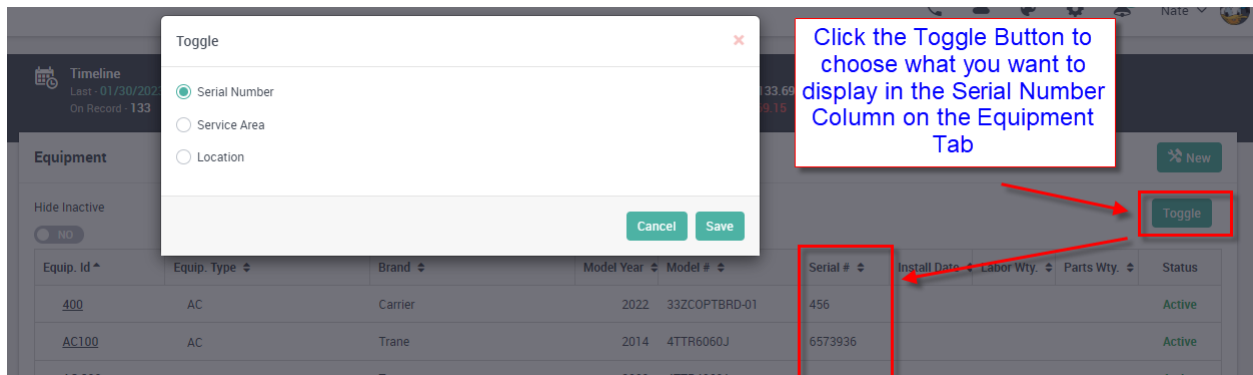
Equip. Id ↑, Equip. Type ↓, Brand ↓, Model Year ↓, Model # ↓, Serial # ↓, Install Date ↓, Labor Wty. ↓, Parts Wty. ↓, Status

400	AC	Carrier	2022	33ZCOPTBRD-01	456				Active
AC100	AC	Trane	2014	4TTR6060J	6573936				Active
AC_200	AC	Trane	2009	4TTR4060A					Active
DIS	Disposers	InSinkErator	2018	BADGER 5	75256				Inactive
GD_100	Disposers	InSinkErator	2019	BADGER 5	68749887				Active
WH001	Water Heater - Tank	Bradford White	2015	RG250T6N	594930459	03/01/2020	03/01/2020		Active

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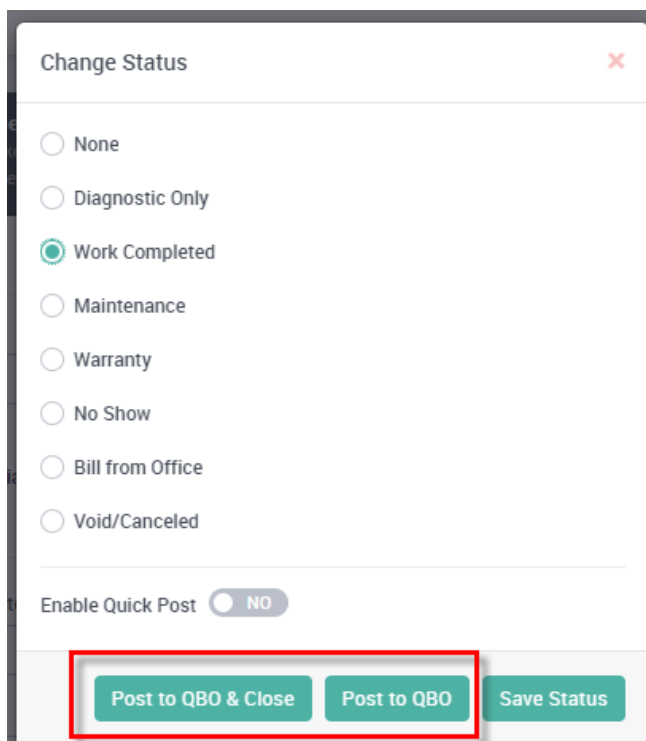
## Equipment Tab in Customer Center now allows you to Toggle the “Serial Number” column

A new “Toggle” button has been added to the Equipment Tab in the Customer Center that will allow you to toggle the Serial Number column to show either Serial Number (default), Service Area, or Location. Depending on the option you pick, the Serial Number column will change to display the option picked.



## Invoice Screen – Option to “Post and Close” or “Post” and stay in the Invoice

When you Post an invoice from the Invoice screen, you now have an option to post and close the invoice screen, which will take you back to the Invoice Listing screen, or post and stay in the Invoice Screen. The “Post and Close” option is how the original posting option worked. The “Post” option will keep you in the Invoice Screen after the invoice is posted.



## Service Agreements - Missed Inspection Tab now allows you to sort by the Notes column

You can now sort the Missed Inspections tab by the Notes Column, which will make it easier to find what missed inspection records you have or have not added notes. Clicking the Notes header will sort by all the records that have a Note added. Clicking the header a second time will reverse sort by all the records that do not have a Note added.

The screenshot shows a table titled 'Agreements (800)' with the 'Missed Inspections' tab selected. The table has columns for Number, Reference Id, Customer Name, Info, Plan, Problem Code, Est. Time, Maintenance Date, Notes, and Actions. The 'Notes' column header is highlighted with a red box. The table contains several rows of data, including SA-464, SA-508, SA-519, SA-423-01, and SA-530-01.

Number	Reference Id	Customer Name	Info	Plan	Problem Code	Est. Time	Maintenance Date	Notes	Actions
SA-464		Whataburger #2314	ⓘ	Commercial	Com - Clean & Check	0.00	02/01/2022	Notes ✓	Schedule
SA-508		Hugh, David 2613	ⓘ	Gold 1 Annual	Insp 1	0.00	05/05/2022	Notes ✓	Schedule
SA-519		McDonald's #14777	ⓘ	Gold 1 Annual	Insp 1	20.00	01/01/2023	Notes ✓	Schedule
SA-423-01		Blue Water	ⓘ	Gold 1 Annual	Insp 1	0.00	02/01/2022	Notes ✓	Schedule
SA-530-01		Alexander, Janet	ⓘ	Gold 1 Annual	Insp 1	0.00	08/02/2022	Notes ✓	Schedule

## Service Agreements - Missed Inspection Tab has a new filter that will allow you to search by Tags

You can now filter the Missed Inspections tab by the tag that has been assigned to the first screen (the General Screen) of the Service Agreement.

The screenshot shows the 'View Agreement - McDonald's #14777' form. The 'General' tab is selected. The form contains fields for Agreement Number, Agreement Plan, Items, Problem Code, Class, Reference Id, and Agreement Period. The 'Tags' field is highlighted with a red box and contains the tag 'Full Coverage'.

McDonald's #14777  
4005 W Parker Road, Plano, Texas, 75093  
(214) 555-7874

General | Billing Schedule | Maintenance Schedule

Agreement Number \* SA-519 Agreement Plan \* Gold 1 Annual  Active

Items PMA 1 Annual Problem Code \* Insp 1 Class Residential

Reference Id ⓘ Reference Id Tags Full Coverage

Agreement Period  Recurring  Auto Renewal

Original Start Date \* 12/16/2021 Contract Start Date \* 12/16/2022 Renewal Date \* 12/15/2023

Agreements (6) Filters Applied: Full Coverage Clear All

Mass Renewal Print Export

All Agreements Active Recently Expired Expired Needs Attention Missed Inspections Search by Name

Number	Reference Id	Customer Name	Info	Plan	Problem Code	Est. Time	Maintenance Date	Notes	Actions
SA-519		McDonald's #14777	ⓘ	Gold 1 Annual	Insp 1	20.00	01/01/2023	Notes ✓	Schedule
SA-551	Deferred income - stage	Gateway Property Management	ⓘ	Test Plan	Spring Inspection	0.00	07/22/2022	Notes	Schedule
SA-503-02		Thomas Trevor	ⓘ	Gold 1 Annual	Insp 1	0.00	10/01/2022	Notes	Schedule
SA-550	Deferred Income - Current price	Gateway Property Management	ⓘ	Test Plan	Spring Inspection	0.00	02/22/2022	Notes	Schedule
SA-586	6546644	Gateway Property Management	ⓘ	Commercial - Custom	Insp 1	0.00	05/02/2022	Notes	Schedule
SA-495-01		Adams, Bruce	ⓘ	Gold 1 Annual	Insp 1	0.00	12/01/2022	Notes	Schedule

15 Showing 1 - 6 of 6

## Master Settings – A default flag for “Allow to Pay Bill Online” has been added to the settings

You can now set a flag that will automatically set all Work Order Invoices and/or Project Management Invoices to be set to “Allow to Pay Bill Online” by default. When you set the Slider to “Yes”, you can select the type of Invoice that you want to set the flag to Yes. For example, you might want to have all new Work Order Invoices set to allow online bill pay, but not Project Management Invoices. NOTE – Only newly created invoices will be set to “Yes”, it will not backfill prior invoices.

Invoice / Quote Settings

Default the 'Allow to Pay Invoices Online' flag to Yes?

YES

Work Order Invoices

Project Management Invoices

Problem Reported Item (Invoice) Tech Time Detail Item (Invoice)

SF Prob Reported SF Tech Time

Default Invoice Footer

LIMITED WARRANTY: All materials, parts, and equipment are warranted by the

## Project Management – Default Business Entity can be changed after the Job has been accepted

You can now change the default Business Entity assigned to the job after it has been accepted. Changing the Business Entity will affect the selection and filters for various Project Management Reports.



The screenshot shows the 'Job Details' screen for a job titled 'New 5 Ton System' (Job #: 22-23). The top navigation bar includes tabs for Time, Job Info, Phases, Billing, Work Orders, and Purchase Order. The main form contains the following fields:

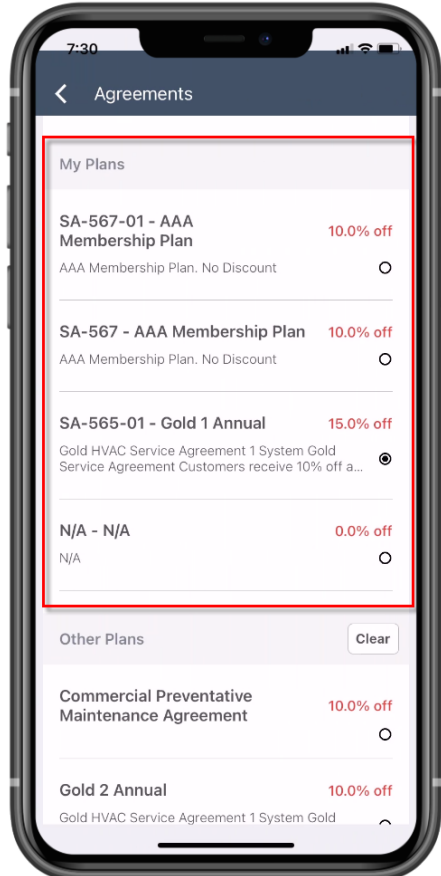
- Status:** Accepted
- Job Name:** New 5 Ton System
- Approval Date:** 08/17/2022
- Sales Rep:** William
- Bill To:** Pathlight Apartments
- General Contractor Job #:** (empty)
- Business Entity:** Installation (highlighted with a red box)
- Lead Source:** Existing Customer
- Note:** Apply Ret'g to Def Class
- Markup:** Standard - 110
- Class:** Installation
- Tax:** Exempt
- Use Tax:** TX-Plano-3057994
- PO #:** PO No.
- Selling Price:** 15000.00
- Closed Date:** Closed Date

On the left side, there is a summary section for 'ACCEPTED' with the following data:

Contract Amount	\$15,000.00
Billed To Date	\$9,000.00
Variance	\$6,000.00
C/O Amount	\$400.00
C/O Billed To Date	\$0.00
Variance	\$400.00

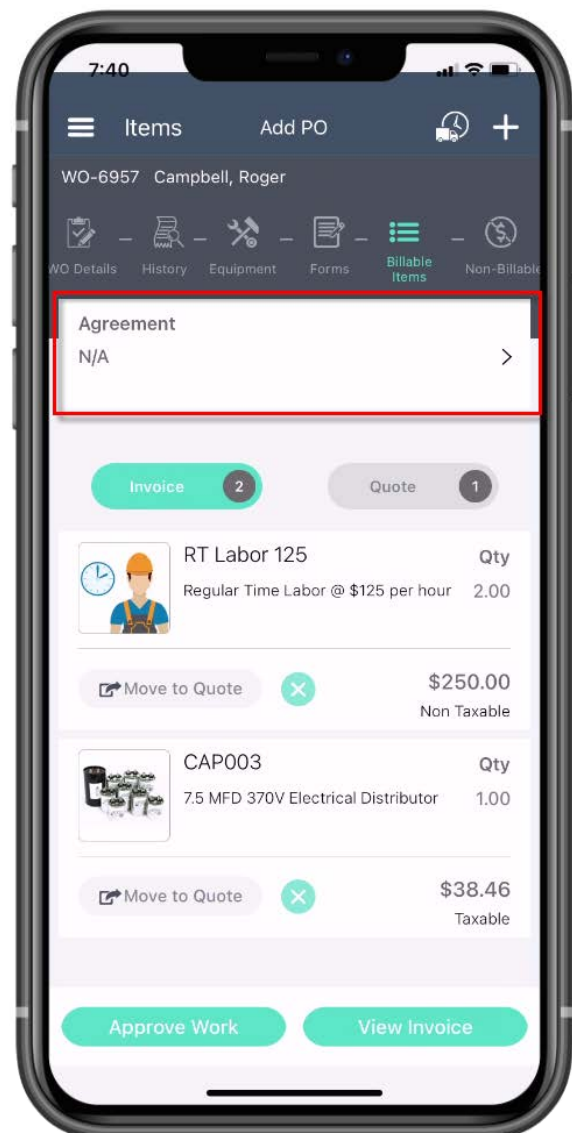
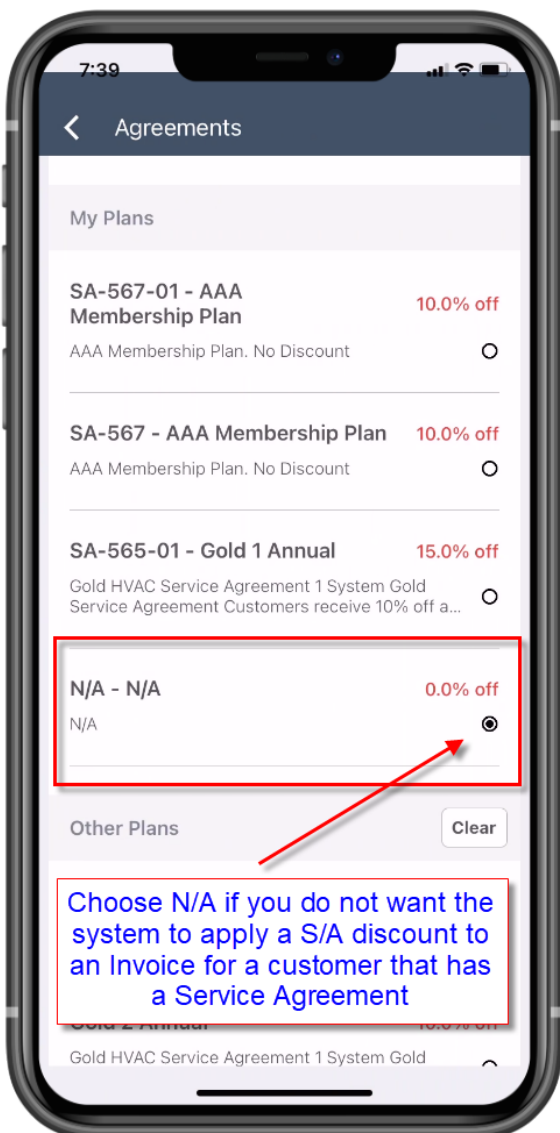
## ServiceFactor Mobile – When changing form one agreement to another, the item will no longer be added to the Items Screen

If you have a customer that has multiple service agreements and you change the agreement from one to another, the system will no longer add the Item associated with the Agreement to the Billable Items screen. If you add a new service agreement (you sold the customer a new agreement), the item will be added to the Billable Items screen.



## ServiceFactor Mobile – You now have the option to NOT associate a Work Order with a Service Agreement if applicable

If you do not want a particular work order associated with a Service Agreement, you can now change the Agreement Selected to “N/A”, which will use regular pricing for the agreement and not include any S/A Discounts. For example, if your company offers both HVAC and Plumbing agreements, but does not give a S/A discount if the customer has work done in a trade for which they do not have a Service Agreement. In this case if the customer doesn't qualify for a Service Agreement discount, you can change the agreement associated with the call to N/A and the system will no longer give a S/A discount and the call will not be associated with their Service Agreement. NOTE – If you change the Agreement Type after you have added items to the Billable Items screen, the prices will be recalculated based on the new Agreement Type you selected, or the N/A Option.



## Reports – New “Invoices Requiring Re-Posting” Report has been added

A new “Invoices Requiring Re-Posting” Report has been added to the Work Order Reports under the “Misc Reports” section. This report will list all invoices that were previously posted, but are no longer in a Posted Status. For example, if you posted an invoice and then added an item to it, changed the cost, etc. and the Invoice became unposted, it will show up in this report. This report will make it easy to determine what invoices need to be re-posted.

▼ Work Order Reports

**Accounting**

- Invoice Pre-Post Report
- Print Work Order Invoices
- Service UseTax Report

**Dispatching**

- Scheduled Calls Report
- Unassigned Calls Report
- Dispatch Status Report

**Profitability**

- Work Order Profitability Report
- Work Order Gross Profit per Man Day Report
- Work Order Call Back Report

**Misc Reports**

- Problem Code Usage Report
- Item Usage Report
- Work Order Printout Report
- Invoices Requiring Re-Posting Report**

< Invoices Requiring Re-Posting

Monday, February 6, 2023 1/1

Invoice #	Customer Name	Invoice Date	Last Post Date	Invoice Status	Resolution Status	Invoice Amount	Tax	Total
<a href="#">E-5658</a>	McNeal, Michelle	09/15/2022	09/15/2022	Pending	None	324.50	0.00	324.50
<a href="#">E-5834</a>	Burke, Joseph	12/09/2022	12/09/2022	Pending	None	937.38	0.00	937.38
<a href="#">E-5852</a>	Conanan, Matt	12/16/2022	12/16/2022	Pending	Work Completed	331.91	0.00	331.91
Count: 3						1,593.79	0.00	1,593.79

## Reports – You can now print a Packing Slip from the system

A new Packing Slip report has been added to the “Print” option from the Work Order file. The Packing Slip by default will print all “Material” item types included on the Invoice and have an option to print “Other” item types. The Packing Slip will take into account the “Print” sliders on the Invoice. If the item is set to NOT print, then it will not be included on the Packing Slip.

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


Packing Slip

(Prints a Packing Slip for Material and/or Other item types)

Material Items  
 Other Items

**NOTE - This will take into account the "Print" sliders on the invoice screen**

Acknowledgement



### Packing Slip

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

Work Order #	<b>WO-6944</b>
Customer PO:	
Invoice Date:	<b>02/02/2023</b>
Invoice No:	<b>F-6036</b>
Sales Rep:	

**Bill To Address**

**Miller, Jeff**  
 4508 Pinehurst Greens Ct  
 Estero, FL 33928

**Site Address**

**Miller, Jeff**  
 4508 Pinehurst Greens Ct  
 Estero, FL 33928

Qty Received	Qty Shipped	Item Name/Number	Desc	Part Number
	4.00	REF006	R410a	
	1.00	BLT001	3L Type 36" Length	

# Reports – You can now print an “Acknowledgement” form from the system

A new “Acknowledgment” form has been added to the “Print” option from the Work Order file. The Acknowledgment will print all items on the invoice along with the pricing, but will have a title of “ACKNOWLEDGMENT – DO NOT PAY” at the top. An “Acknowledgment” is typically used when parts are given to a 3<sup>rd</sup> party, but payment is not yet due and an invoice will be sent at a later date. NOTE – The Acknowledgment will print all items on the invoice, no matter what the cost type (Material, Labor, Subcontractor or Other) and does not take into account the “Print” sliders.

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

---

Packing Slip

(Prints a Packing Slip for Material and/or Other item types)

Material Items  
 Other Items

NOTE - This will take into account the "Print" sliders on the invoice screen

Acknowledgement

## ACKNOWLEDGMENT - DO NOT PAY

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

Invoice Date: **02/02/2023**  
 Invoice No: **F-6036**  
 Sales Rep:  
 Customer PO:  
 Work Order No. **WO-6944**

**Bill To Address**

**Jeff Miller**  
 4508 Pinehurst Greens Ct,  
 Estero, FL 33928

**Site Address**

**Jeff Miller**  
 4508 Pinehurst Greens Ct,  
 Estero, FL 33928

Description	Qty	Price (\$)	Amount (\$)
<b>Equipment ID: 100 - Trane - M/N: 4TTR6048J - S/N: 5636754</b>			
3L Type 36" Length	1.00	35.03	35.03
R410a	4.00	38.25	153.00
Sub Total			<b>\$188.03</b>
Tax ( 0.0000 % )			\$0.00
Total			<b>\$188.03</b>