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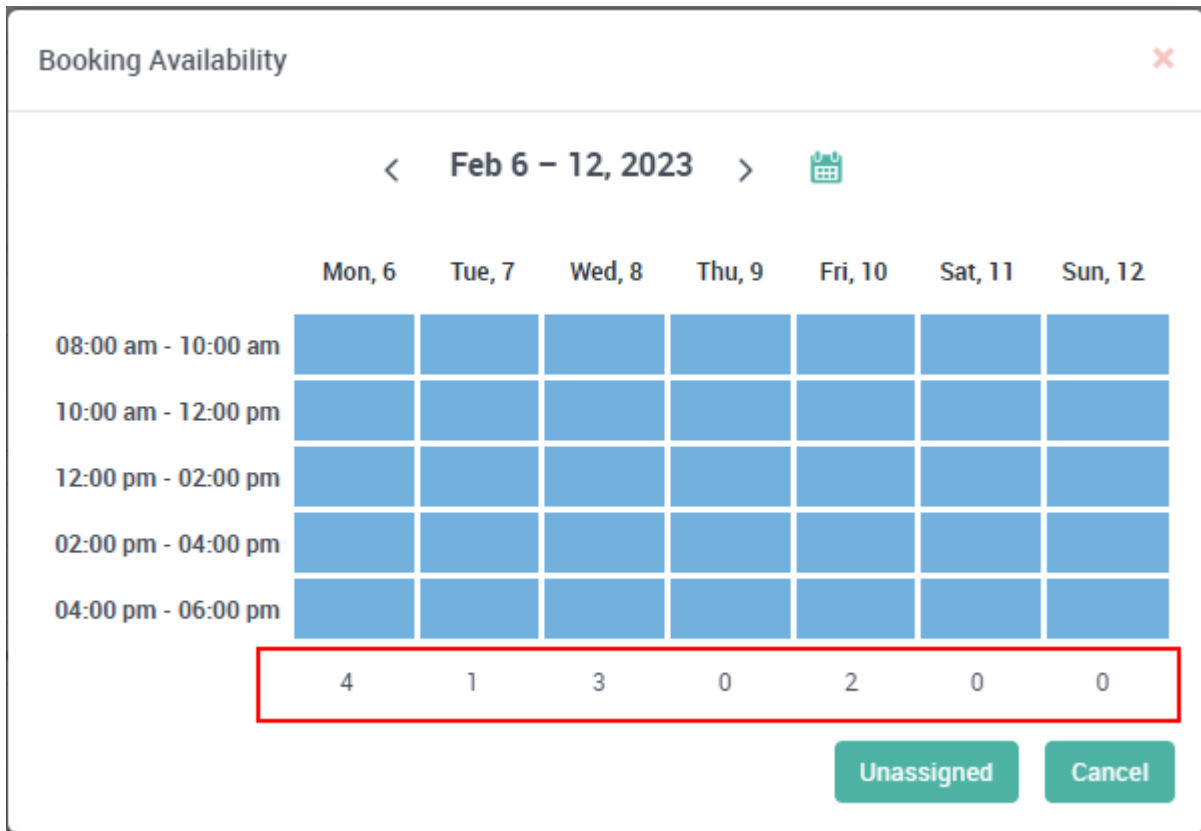
When adding a Work Order for a customer that has a Service Agreement, you now have the option to not associate the call with their Service Agreement

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.

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.

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.

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 grouoped with the other sliders and is located just above the "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.

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.

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.

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.
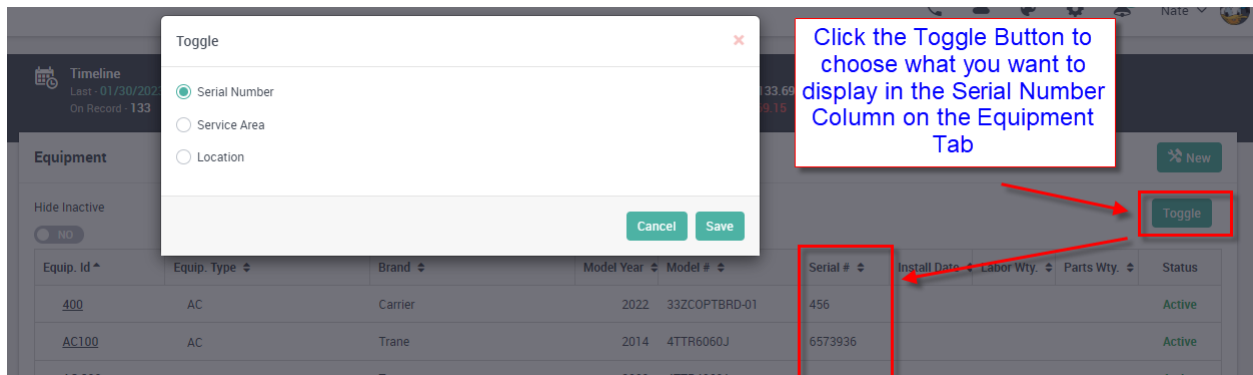
Invoice Screen – Option to "Post and Close" or "Post" and stay in the Invoice

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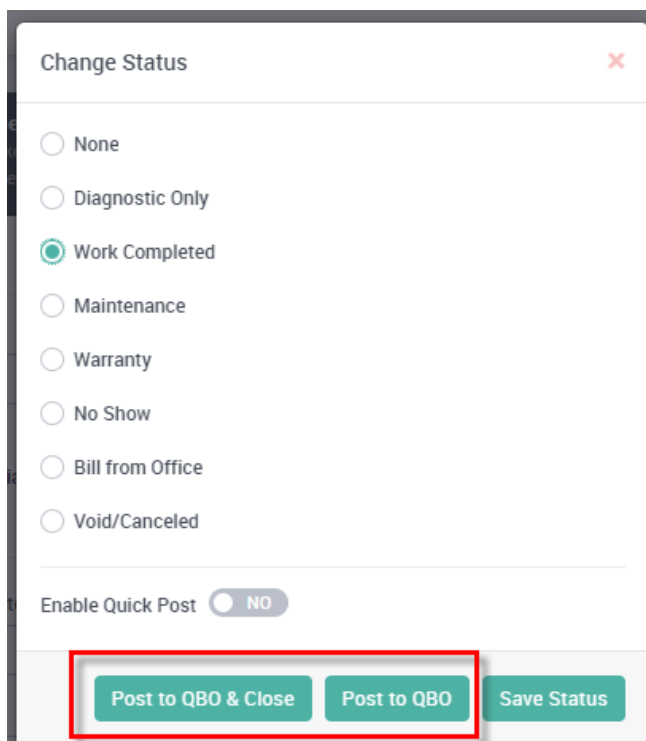
Service Agreements - Missed Inspection Tab now allows you to sort by the Notes column

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.

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 Screeen) of the Service Agreement.

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.

Project Management – Defalt 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.

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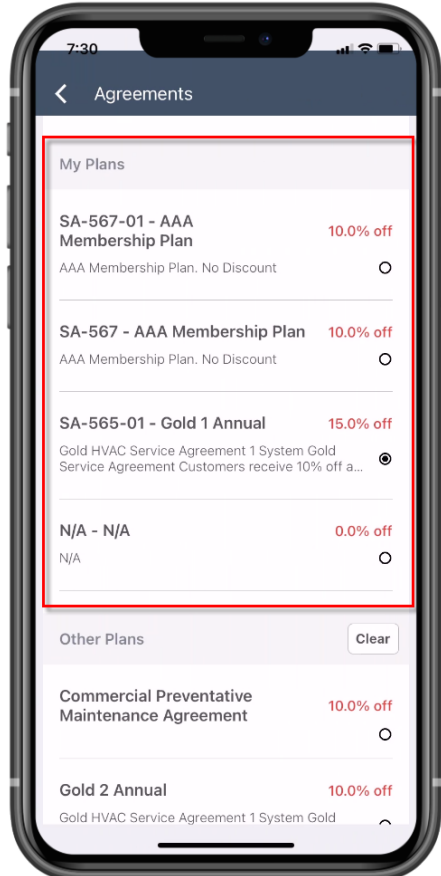
ServiceFactor Mobile – You now have the option to NOT associate a Work Order with a Service Agreement if applicable

If yo 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 exmple, 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.
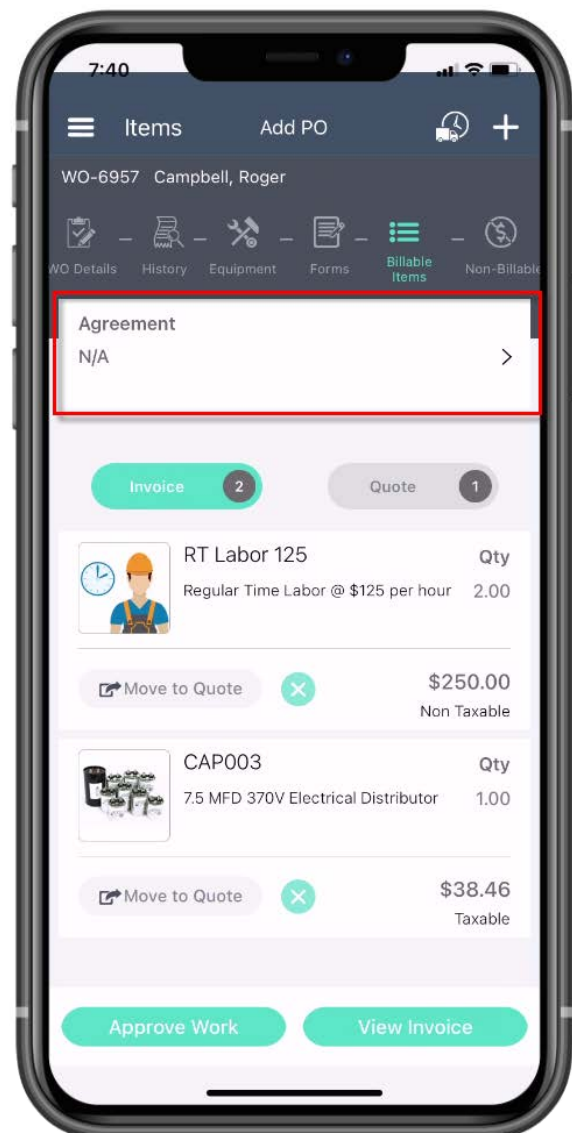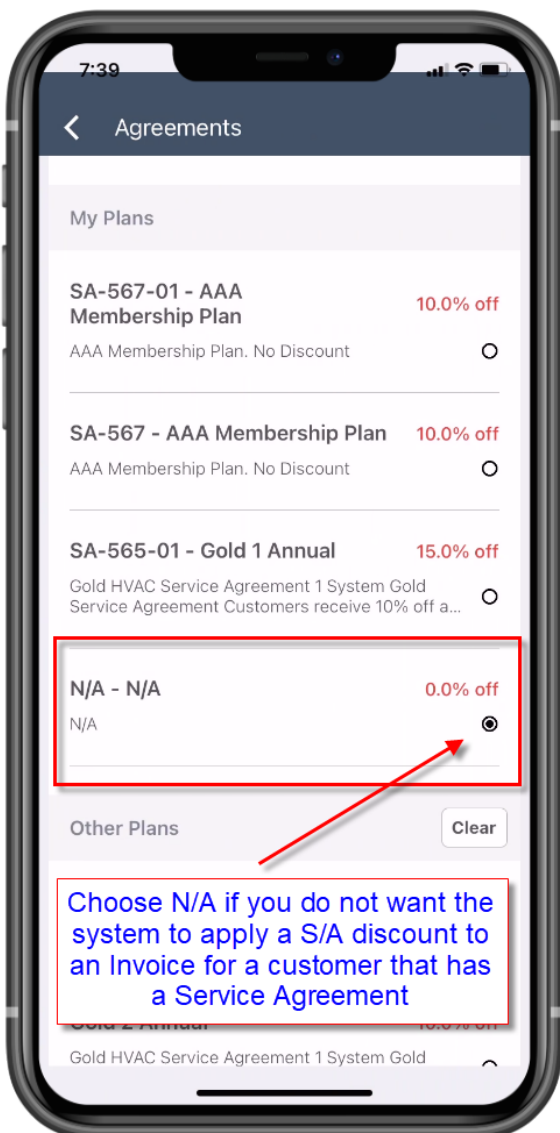
Reports – New "Invoices Requiring Re-Posting" Report has been added

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.

Invoice #	Customer Name	Invoice Date	Last Post Date	Invoice Status	Resolution Status	Invoice Amount	Tax	Total
F-5658	McNeal, Michelle	09/15/2022	09/15/2022	Pending	None	324.50	0.00	324.50
F-5834	Burke, Joseph	12/09/2022	12/09/2022	Pending	None	937.38	0.00	937.38
F-5852	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.

Reports – You can now print an "Acknowledgement" form from the system

A new "Acknowledgment" form has been added to the "Print" option form 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 3rd 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.