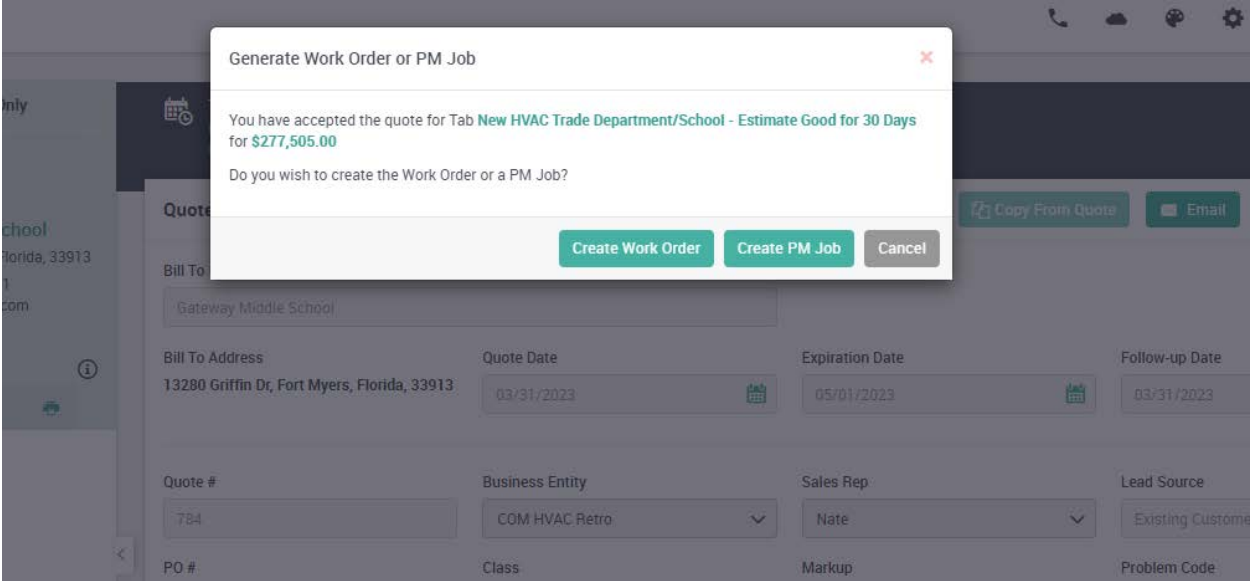


# SF Release Notes: April 4, 2023

## You can now create a Project Management Job from an accepted quote

A new feature has been added that will allow you to create a Project Management Job from an accepted quote. This will allow you to use the Quoting System to generate a professional looking quote for larger jobs via ServiceFactor. When you create a Job from the quote, you can choose to have the costs associated with the items go over to the default phase of the Job, or you can choose to have the individual items flow over to the Job, depending on how you want to track your costs.



Job Name \*  
Job Name

Approval Date  
03/30/2023

Sales Rep  
Nate

Bill To  
Gateway Middle School

General Contractor Job #  
General Contractor Job #

Business Entity  
COM HVAC Retro

Lead Source \*  
Existing Customer

Bill To  
13280 Griffin Dr, Fort Myers, Florida,  
33913  
(239) 555-1171

Note

Markup  
Commercial

Class  
Installation

Tax \*  
Florida 6.5

Use Tax  
Search and select

PO #  
56558

Selling Price \*  
277505.00

How do you want the item costs from the Quote reflected in the Job?

- Only Add the item Costs to the Default Phase
- Add the individual applicable items to the Default Phase

## Quotes – A new status has been added for “Manually Handled”

A new status has been added to Quotes called Manually Handled. This status should be used if you quoted a customer and they approved it, but you did the work on a different work order, or you created a Job for it, etc. Prior to this release, the only way to change the status of a quote from Accepted was to generate a Work Order from the Quote, which would automatically change the status and remove the quote from the “Accepted” tab. With this release, you can now either create a Work Order (typically used when it is a change out or retrofit, a repair, etc.), or create a Project Management Job (typically used for your larger jobs that you want to break down into phases, track change orders, produce multiple billings, etc.). Both of these statuses will remove the quote from the “Accepted” tab. If you do not want to generate a Work Order or a Project Management job for an accepted quote, you can use the status of “Manually Handled” to remove it from the “Accepted” status.

The screenshot displays a software interface for managing quotes. At the top, there are navigation tabs for Timeline, Timesheet, Invoice, Payments, Quote, and Purchase Order. The Quote tab is active, showing a quote with a status of "Accepted". The quote details include Bill To (REmax), Bill To Address (PO Box 123, San Antonio, Texas, 78233), Quote Date (10/20/2022), Expiration Date (11/20/2022), and Follow-up Date (10/20/2022). Other fields include Quote # (709), Business Entity (Res HVAC Service), Sales Rep (Drew), Lead Source (Existing Customer), PO #, Class (Residential-Service), Markup (Standard - 110), and Problem Code (Insp 1). There are also toggle switches for Print Equipment (YES) and Hide Prices (NO). A red box highlights the text: "New status of 'Manually Handled' has been added to Quotes". A red arrow points from this text to a dropdown menu in the Quote Items table, which shows the new status option "Manually Handled" selected.

Quote **Accepted** [Copy From Quote](#) [Email](#) [Print](#) [Save](#)

Bill To: REmax

Bill To Address: PO Box 123, San Antonio, Texas, 78233 (210) 444-4444

Quote Date: 10/20/2022 Expiration Date: 11/20/2022 Follow-up Date: 10/20/2022

Quote #: 709 Business Entity: Res HVAC Service Sales Rep: Drew Lead Source: Existing Customer

PO #: Class: Residential-Service Markup: Standard - 110 Problem Code: Insp 1

Tags: Print Equipment: YES Hide Prices: NO

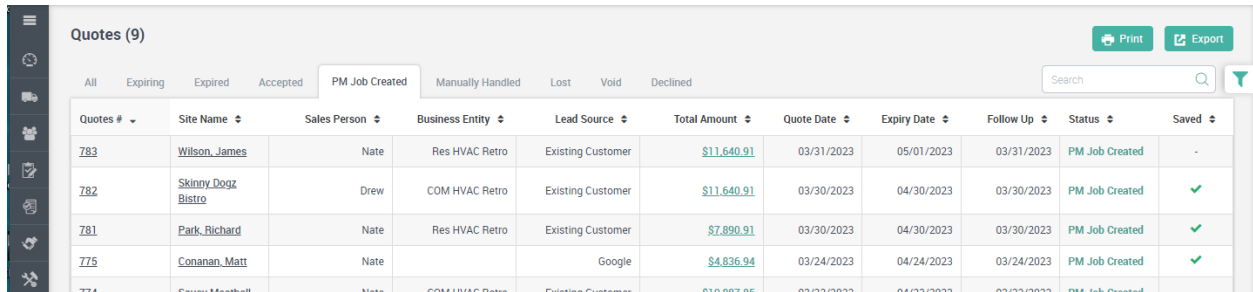
Mobile [Create WO or PM Job](#) [Summary Detail](#) [Profitability Details](#) Accepted

Item	Description	Qty	List Cost	Actual Cost	Rate (\$)	Amount (\$)	Tax	Equipment
MTS110010	Install Round Non-Programmable Digital Thermostat	1.00			316.00	316.00		<input type="text" value="Search and select"/> <input checked="" type="radio"/>

Accepted  
Pending  
Accepted  
Lost  
Void  
**Manually Handled**

## Quotes – New tabs have been added to the Quotes menu option

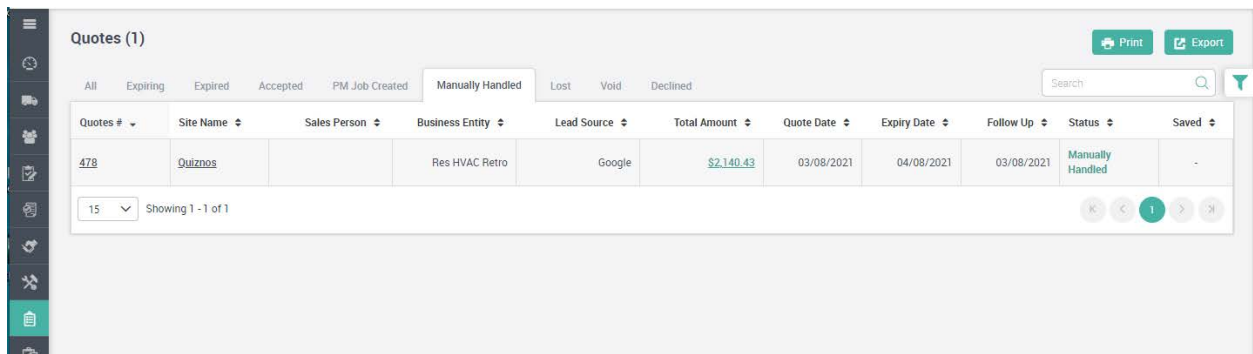
New tabs for “PM Job Created” and “Manually Handled” statuses have been added to the Quotes Menu.



Quotes (9)

All Expiring Expired Accepted **PM Job Created** Manually Handled Lost Void Declined

Quotes #	Site Name	Sales Person	Business Entity	Lead Source	Total Amount	Quote Date	Expiry Date	Follow Up	Status	Saved
783	Wilson, James	Nate	Res HVAC Retro	Existing Customer	\$11,640.91	03/31/2023	05/01/2023	03/31/2023	PM Job Created	-
782	Skinny Dogz Bistro	Drew	COM HVAC Retro	Existing Customer	\$11,640.91	03/30/2023	04/30/2023	03/30/2023	PM Job Created	✓
781	Parik, Richard	Nate	Res HVAC Retro	Existing Customer	\$7,890.91	03/30/2023	04/30/2023	03/30/2023	PM Job Created	✓
775	Conanano, Matt	Nate		Google	\$4,836.94	03/24/2023	04/24/2023	03/24/2023	PM Job Created	✓
774	Caruru Meathall	Nate	COM HVAC Retro	Existing Customer	\$10,887.85	03/23/2023	04/23/2023	03/23/2023	PM Job Created	-



Quotes (1)

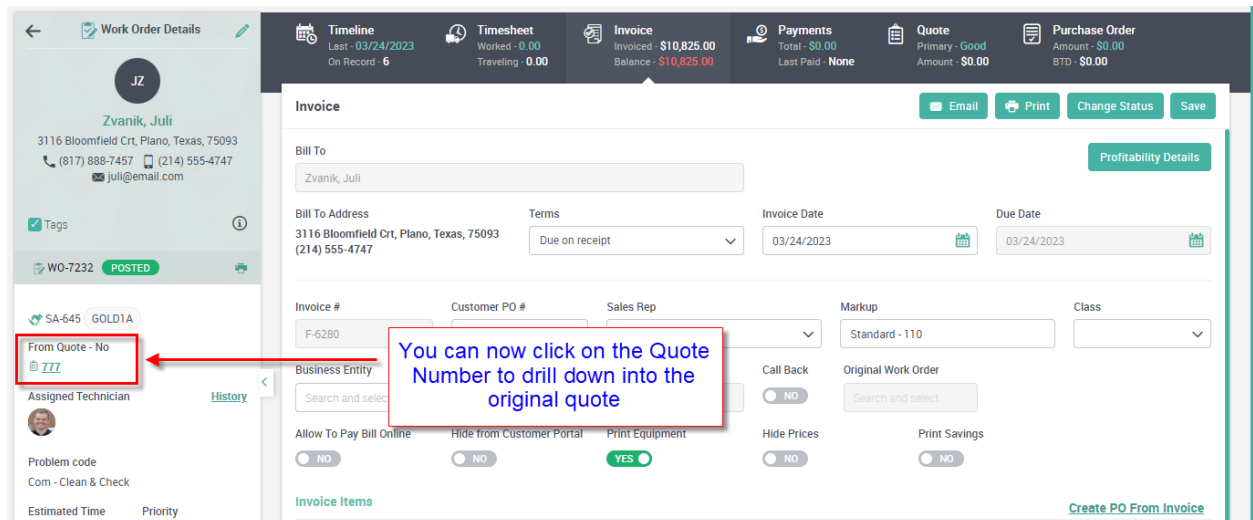
All Expiring Expired Accepted **PM Job Created** **Manually Handled** Lost Void Declined

Quotes #	Site Name	Sales Person	Business Entity	Lead Source	Total Amount	Quote Date	Expiry Date	Follow Up	Status	Saved
478	Quiznos		Res HVAC Retro	Google	\$2,140.43	03/08/2021	04/08/2021	03/08/2021	Manually Handled	-

Showing 1 - 1 of 1

## Work Orders created from a Quote will now have a hyperlink back to the Quote

The work orders that are created from a Quote will now have a hyperlink back to the quote. Prior to this release, the quote number was listed, but it was not a hyperlink. You can now click on the Quote Number and you will be taken to the original quote.



Work Order Details

Timeline Last - 03/24/2023 On Record - 6

Timesheet Worked - 0.00 Traveling - 0.00

Invoice Invoiced - \$10,825.00 Balance - \$10,825.00

Payments Total - \$0.00 Last Paid - None

Quote Primary - Good Amount - \$0.00

Purchase Order Amount - \$0.00 BTD - \$0.00

Invoice

Bill To: Zvanik, Juli

Bill To Address: 3116 Bloomfield Crt, Plano, Texas, 75093 (214) 555-4747

Terms: Due on receipt

Invoice Date: 03/24/2023

Due Date: 03/24/2023

Invoice #: F-6280

Customer PO #: SA-645

Sales Rep: GOLD1A

Markup: Standard - 110

Class:

Business Entity: Search and select

Call Back: NO

Original Work Order: Search and select

Allow To Pay Bill Online: NO

Hide from Customer Portal: NO

Print Equipment: YES

Hide Prices: NO

Print Savings: NO

Invoice Items

Create PO From Invoice

From Quote - No [ZZZ](#)

You can now click on the Quote Number to drill down into the original quote

## A new interface has been introduced for assigning “On Call” technicians

The On Call assignment has been revamped and will now allow you to quickly assign your On Call technicians for a week at a time as opposed to having to assign them one day at a time. Now when you bring up the new On Call screen, you can select the entire week at once and assign multiple techs at the same time. The On Call schedule will also show any days that the technician is not scheduled to work, but will still allow you to schedule them for On Call, if applicable.

On Call Schedule		Apr 3 - Apr 9, 2023						
Employees		Mon	Tue	Wed	Thur	Fri	Sat	Sun
1 - On Hold	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 - Incomplete	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allen Johnson	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billy Bob	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Brett	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chuck Tuttle	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Dennis Jordan	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Drew	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
James	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## The Equipment Field on the Invoice and Quote screens now show a field tip indicating that you can enter data in the field

You have always been able to assign which piece of equipment was worked on in the Invoice or a Quote, but it was not obvious that you could enter the equipment unless you knew you could click on the blank space. We have now added a field tip to make it more obvious.

Invoice Items [Create PO From Invoice](#)

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
Main	BLV	Replace 1/4 HP 1075 RPM 115V			6.00		100	Residential	YES <input checked="" type="checkbox"/>
Main	MO				0.00	YES <input checked="" type="checkbox"/>	Search and select	Residential	YES <input checked="" type="checkbox"/>
Main	CAP003	7.5 MFD 370V Electrical Distributor	1.00	0.00	0.00	YES <input checked="" type="checkbox"/>	Search and select	Residential	YES <input checked="" type="checkbox"/>

A field tip has been added to the Equipment Field making it obvious that you can associate an item to a piece of equipment

# History Screen – The Equipment worked on is now expanded by default

When viewing the history, any equipment that has been worked on will now be expanded by default. Prior to this release, you would have to manually expand the piece of equipment to view what items were associated with the equipment.

**Customer History** SF History

WO-7268 F-6310	03/31/2023 \$ 426.00	>	WO-7268 - Assigned					
WO-7267 F-6309	03/31/2023 \$ 0.00	>	Call Date	PO #	Invoice #	Invoice Date	Amount	
WO-6427 F-5628	09/08/2022 \$ 408.97	>	Problem Reported	Unit 401 is leaking water above tub				
WO-6423 F-5624	09/08/2022 \$ 100.00	>	Site Address	Promised Time	Sales Rep			
WO-6346 A-5561	08/19/2022 \$ 493.13	>	Custer Park Apts Bldg A , 3401 Custer Rd, Plano, Texas, 75023 , (214) 555-1414				--	--
WO-6345 A-5560	08/19/2022 \$ 703.44	>	Scheduled Tech	Scheduled Date				
WO-6344 A-5559	08/19/2022 \$ 250.00	>	Allen Johnson	03/31/2023- 05:00 PM to 07:00 PM				
WO-6333 A-5550	08/18/2022 \$ 368.13	>	<b>Equipment</b>					
WO-6332 A-5549	08/18/2022 \$ 493.13	>	Equip. ID	Equip. Type	Brand	Model	Serial	Location
			100	AC	Trane	4TTR3048A	HFSDH75425JG&C	Around the back
			<b>Items</b>					
			Item. Name	Quantity	Rate	Amount		

Prior to this release, you had to click the arrow to open the details of what items were assigned to the piece of equipment

**Customer History** SF History

WO-7268 F-6310	03/31/2023 \$ 426.00	>	WO-7268 - Assigned					
WO-7267 F-6309	03/31/2023 \$ 0.00	>	Call Date	PO #	Invoice #	Invoice Date	Amount	
WO-6427 F-5628	09/08/2022 \$ 408.97	>	Problem Reported	Unit 401 is leaking water above tub				
WO-6423 F-5624	09/08/2022 \$ 100.00	>	Site Address	Promised Time	Sales Rep			
WO-6346 A-5561	08/19/2022 \$ 493.13	>	Custer Park Apts Bldg A , 3401 Custer Rd, Plano, Texas, 75023 , (214) 555-1414				--	--
WO-6345 A-5560	08/19/2022 \$ 703.44	>	Scheduled Tech	Scheduled Date				
WO-6344 A-5559	08/19/2022 \$ 250.00	>	Allen Johnson	03/31/2023- 05:00 PM to 07:00 PM				
WO-6333 A-5550	08/18/2022 \$ 368.13	>	<b>Equipment</b>					
WO-6332 A-5549	08/18/2022 \$ 493.13	>	Equip. ID	Equip. Type	Brand	Model	Serial	Location
			100	AC	Trane	4TTR3048A	HFSDH75425JG&C	Around the back
			<b>Items</b>					
			Item. Name	Quantity	Rate	Amount		
			CAP003	7.5 MFD 370V Electrical Distributor	1.00	\$ 0.00	\$ 0.00	
			MOT002	1/4 hp 1075 RPM 230V Cond Mtr	1.00	\$ 0.00	\$ 0.00	
			BLW110000	Replace 1/4 HP 1075 RPM 115V 3 Speed Blower Motor	1.00	\$ 426.00	\$ 426.00	

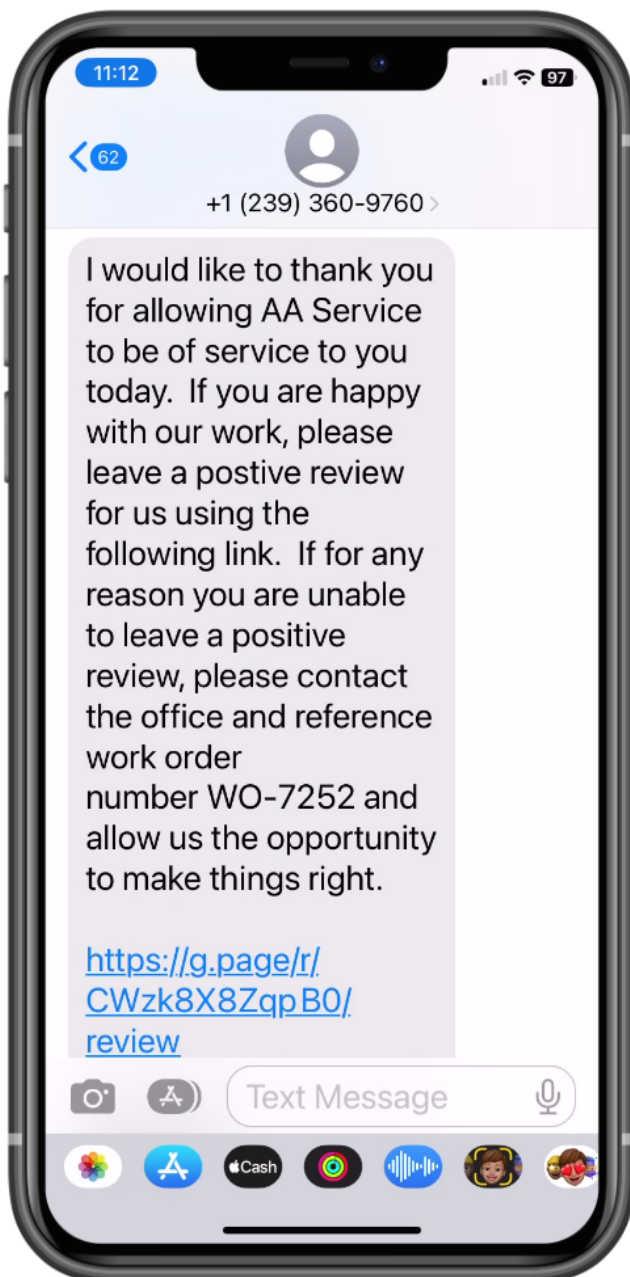
Now the equipment will automatically be expanded to show what items were used on the piece of equipment

## Communication Templates – A Work Completed Template has been added

A new template has been added that will send a message to the customer when an invoice has been completed via ServiceFactor Mobile. This will allow the system to send a message thanking the customer for allowing you to be of service to them and to ask them to leave a review, for example. A “Review Link” insert code is available that will send the review link associated with the Employee that completed the invoice. This will allow you to have different review links for each employee if you want, or you can use the same review link for all employees.

NOTE – You assign the Review Link in the Employee File.

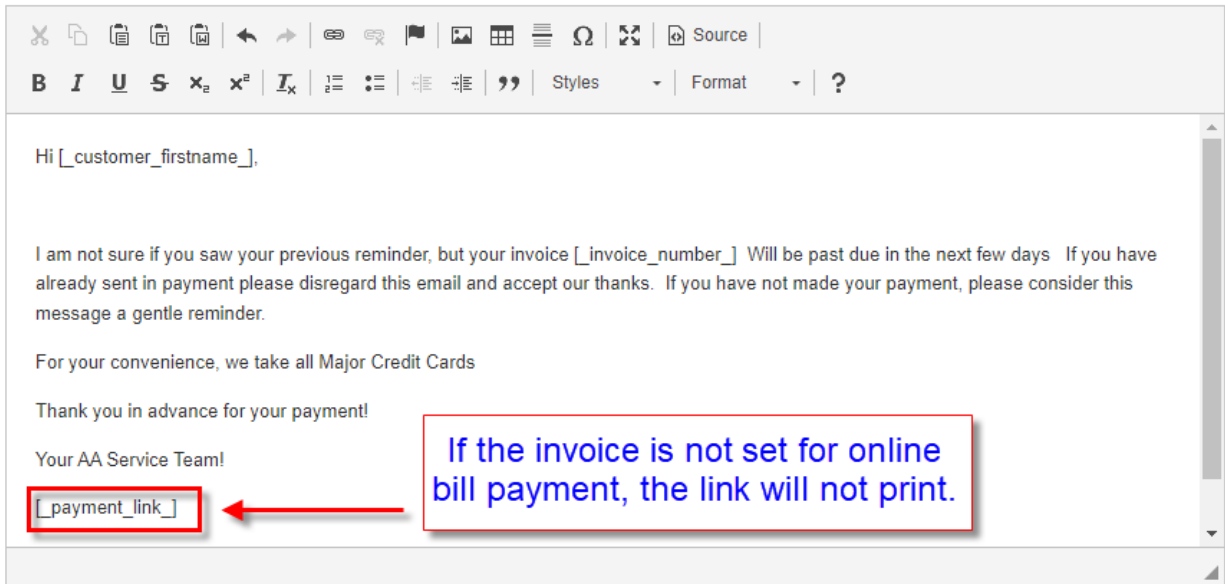
NOTE 2 – Work completed message can be sent via SMS and/or E-Mail



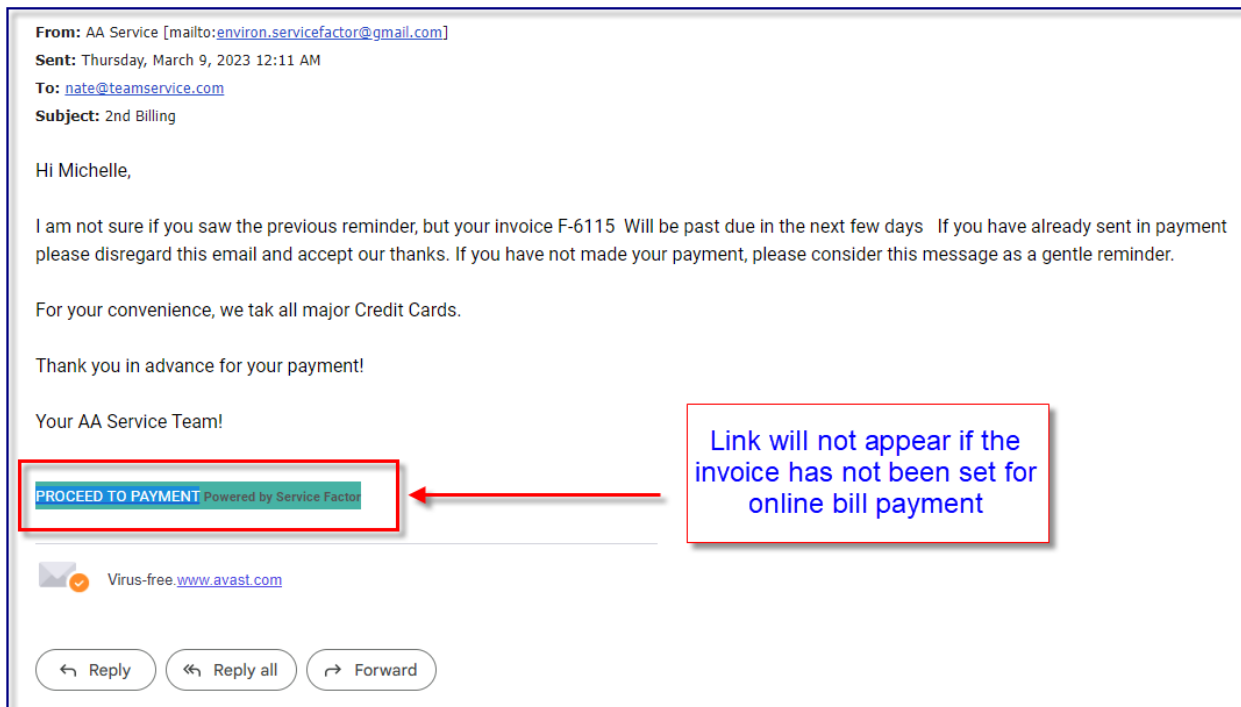
## Communication Template – 1<sup>st</sup> and 2<sup>nd</sup> bill reminders now have the ability to include the online bill payment link

If you are using the Online Payment feature, you can now include the online payment link in your 1<sup>st</sup> and 2<sup>nd</sup> bill reminders if applicable. Please note that you may have some invoices that you allow online payments and some that you don't, so you shouldn't mention the ability to pay online in your message. If the invoice does allow the ability to pay online, the "Proceed to Payment" link will appear on the invoice, as long as you have defined it in the setup.

Email Body



The screenshot shows an email editor interface. The email body contains the following text: "Hi [\_customer\_firstname\_],", "I am not sure if you saw your previous reminder, but your invoice [\_invoice\_number\_] Will be past due in the next few days. If you have already sent in payment please disregard this email and accept our thanks. If you have not made your payment, please consider this message a gentle reminder.", "For your convenience, we take all Major Credit Cards", "Thank you in advance for your payment!", "Your AA Service Team!", and a placeholder "[\_payment\_link\_]". A red box highlights the placeholder, and a red arrow points to it from a larger red box containing the text: "If the invoice is not set for online bill payment, the link will not print."




The screenshot shows an email client interface. The email header includes: "From: AA Service [mailto:environ.servicefactor@gmail.com]", "Sent: Thursday, March 9, 2023 12:11 AM", "To: nate@teamservice.com", and "Subject: 2nd Billing". The email body contains: "Hi Michelle,", "I am not sure if you saw the previous reminder, but your invoice F-6115 Will be past due in the next few days. If you have already sent in payment please disregard this email and accept our thanks. If you have not made your payment, please consider this message as a gentle reminder.", "For your convenience, we tak all major Credit Cards.", "Thank you in advance for your payment!", and "Your AA Service Team!". A red box highlights a button that says "PROCEED TO PAYMENT Powered by Service Factor". A red arrow points to this button from a larger red box containing the text: "Link will not appear if the invoice has not been set for online bill payment". At the bottom, there is a virus-free notification and buttons for "Reply", "Reply all", and "Forward".

## Communication Template – Late Bill Reminder has been added

A new communication template has been added for sending out a late bill reminder. The late bill reminder can be set up to send an email after an invoice is past due by “X” number of days.

NOTE – This template also includes the ability to enter the online payment link if the invoice is set up for online payment. If the invoice is not set up for online payment schedule, the link will not be included when the reminder is sent.

 Company - **Communication Templates**

---

### Basic Details

Template Late Bill Reminder	Exclude Customer Type
No of days before the reminder should be sent	No of days after the reminder should be sent 5
<input type="checkbox"/> Only allow manual sending	Send At (Approximate) 12:00

**Email**   SMS   Phone


This template is used to allow us to send out a reminder for past due invoices.

Active

Reply to Address payments@aaaservice.com	BCC payments@aaaservice.com
---	--------------------------------

Subject \*  
Past Due Invoice

Email Body



[\_customer\_displayname\_],

This a friendly reminder that your invoice #[\_invoice\_number\_] is past due. If you have recently made the payment, thank you. If you have not yet paid this invoice, please submit payment right away to avoid any future delay in service.

Sincerely,



# Project Management – Ability to apply Retainage to the default class has been added.

If your company tracks retainage on Project Management Jobs, you now have the ability to apply the retainage to the default class associated with the job. Prior to this release, the retainage would be applied to the parent G/L account and did not apply it to a class. If you want the Retainage applied to the default job class, you will need to set the ‘Apply Retainage to Default Job Class’ slider to yes in the Job Billing Tab.

NOTE – The flag can be changed when generating Job Invoices, but you can set the default setting in the Billing Screen of the Job.

**Musso Job**  
Job #: 23-16

Form Type: Regular | Retainage %: 10.00 | **Apply Retainage to Default Job Class: YES** | Sales Rep: William | Adjustment: 0.00 | Terms: Due on receipt

Item	Description	Class	Total Value	Taxable	% Complete	\$ Complete
Rough	Replace existing System	Installation	8232.91	NO	0.00	0.00
Rough	Replace existing system, taxable work	Installation	3200.00	YES	0.00	0.00

**Musso Job**  
Job #: 23-16

Form Type: Regular | Invoice Date: 04/03/2023 | Period To: 04/03/2023 | Terms: Due on receipt

Bill To: Musso, Andrew | Sales Rep: William | PO #: | Retainage %: 10.00

Allow To Pay Bill Online: YES | Bill Retainage: NO | **Apply Retainage to Def Class: YES**

	Base Contract	Change Orders
Sell Price	\$11,432.91	\$0.00
Billed TD	\$0.00	\$0.00
Open (Diff)	\$11,432.91	\$0.00
% Billed	0.00%	0%
Retainage	\$0.00	\$0.00

Source	Description	Total Value	% Complete	\$ Complete	\$ Retainage	Taxable	Class
Phase	Replace existing System	8232.91	40.00000	3293.16	329.31	NO	Installation
Phase	Replace existing system, taxable work	3200.00	25.00000	800.00	80.00	YES	Installation

35.80 % Billed Complete (including this invoice)	\$4,093.16
Less 10.00 % Retainage (This invoice)	\$409.31
Previously Invoiced	\$0.00
Subtotal	\$3,683.85
Tax	\$46.80
Total due this invoice	\$3730.65

## Reports – On Call Reports have been added

2 new On Call Reports have been added to the system – On Call Schedule Report and On Call Calendar Report. The first report will print the On Call details as line items and the second report will print a Calendar showing what Techs are On Call for the various dates.

### On Call Schedule Report

Date:	Weekday	Employee	Holiday
4/26/2023	Wednesday	Allen Johnson	
4/27/2023	Thursday	Allen Johnson	
4/28/2023	Friday	Allen Johnson	
4/29/2023	Saturday	Allen Johnson	
4/30/2023	Sunday	Allen Johnson	

### On Call Calendar Report

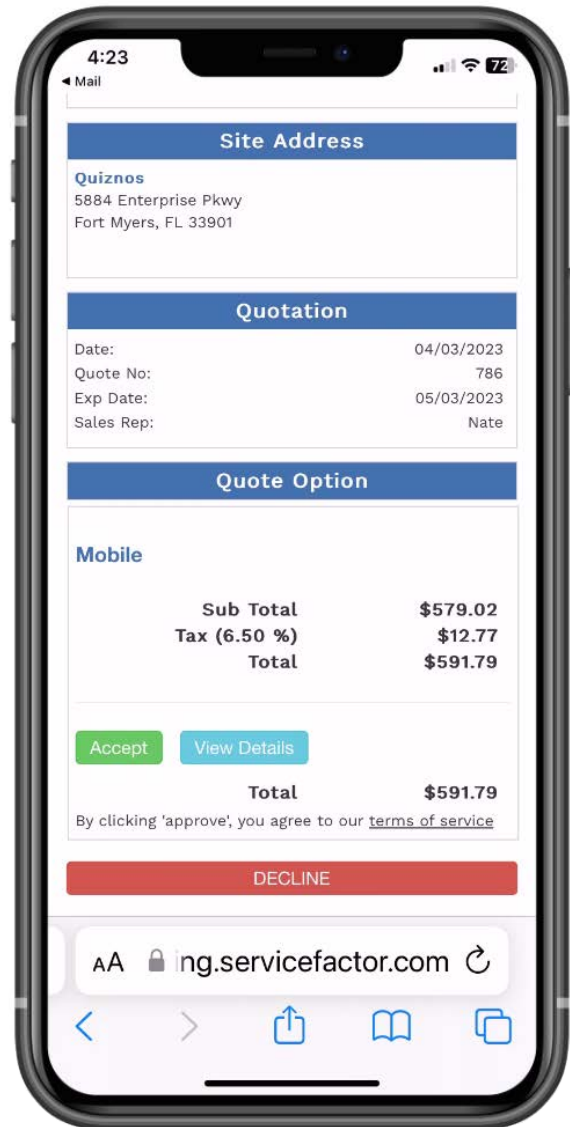
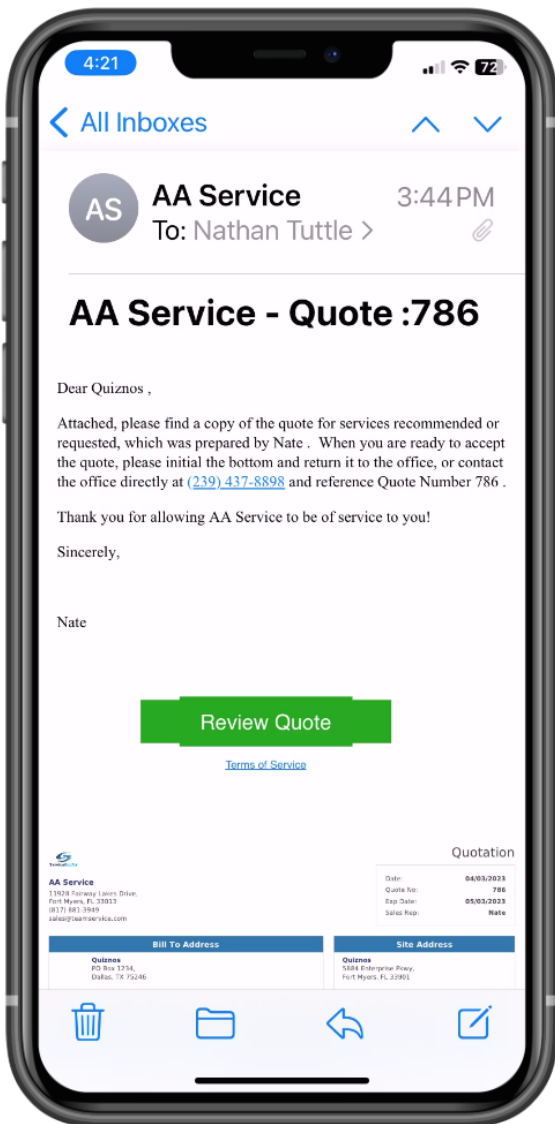
April 2023

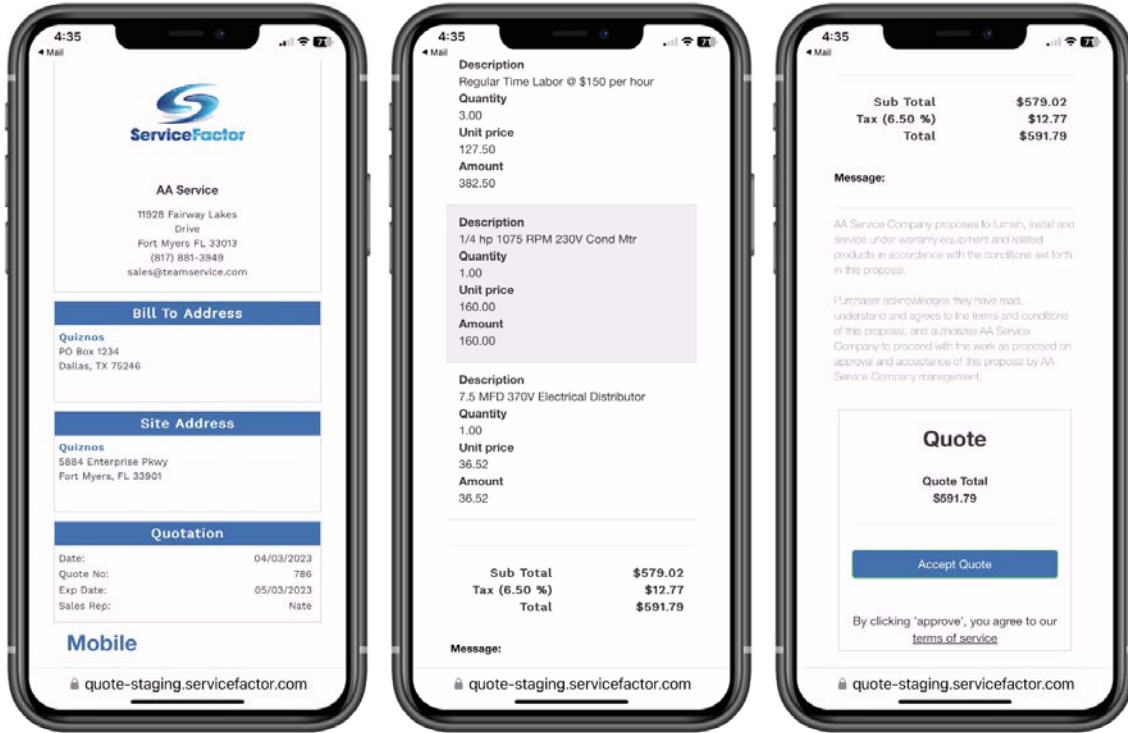
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26 Drew	27 James Drew	28 James Drew	29 James Drew	30 James Drew	31 James Drew	1 James Drew
2 James Drew	3 Dennis Jordan	4 Dennis Jordan	5 Dennis Jordan	6 Dennis Jordan Brett	7 Dennis Jordan Brett	8 Dennis Jordan
9 Dennis Jordan	10 Billy Bob	11 Billy Bob	12 Billy Bob	13 Billy Bob Chuck Tuttle	14 Billy Bob Chuck Tuttle	15 Billy Bob Chuck Tuttle
16 Billy Bob Chuck Tuttle	17 Drew James Jason Alexander Chuck Tuttle	18 Drew James Jason Alexander Chuck Tuttle	19 Drew James Jason Alexander Chuck Tuttle	20 Drew James Jason Alexander	21 Drew James Jason Alexander	22 Drew James Jason Alexander
23 Drew James Jason Alexander	24 Allen Johnson	25 Allen Johnson	26 Allen Johnson	27 Allen Johnson	28 Allen Johnson	29 Allen Johnson
30 Allen Johnson	1	2	3	4 Chuck Tuttle	5 Chuck Tuttle	6 Chuck Tuttle

# SF Mobile – Emailed quotes from SF Mobile can now be accepted online like quotes emailed from the office.

The same quote template has been applied to quotes emailed from SF Mobile that will allow the customer to accept or decline the quote online.

NOTE – It is important that you fill out your “Terms of Service” in your settings so that the customer will be able to view it from emailed quotes. The Terms of Service can be found in the Settings under the “Misc.” heading.





## SF Mobile – Fixed an issue with Android Version where in certain situations you couldn't edit the equipment after saving it.

In the Android Version, there were certain scenarios that would prevent the ability to edit a piece of equipment in SF Mobile after it was added. This has been fixed with this release.