SF Release Notes: May 23, 2023

Automatic Labor Sell Price Calculation

A new feature has been added that will allow you to automatically calculate labor sell price based on dispatch times.   This new feature allows you to define labor rates for Travel Time, Regular Time, Overtime, and Other Time as well as a minimum charge for the first "X" amount of time, if applicable. Labor rates can be assigned to customers and when you get ready to do your billing, you can choose to have the system automatically calculate the Labor Sell Price based on the dispatch times. Labor will be calculated based on a pre-defined billing interval, for example, a 15 minute billing interval, and will take into consideration the dispatch times to determine how much time should be charged for Travel Time, Regular Time and/or Overtime based on your standard working hours setting. If you have different standard hours for different service agreement types, the system will even take that into consideration based on the customer's service agreement. You can set up as many different labor rates as necessary; making it easy to properly charge customers that may have negotiated special rates (think commercial customers). This is a great feature for customer's that charge Time and Material as opposed to Flat Rate. This feature can be used by office users or mobile users to properly calculate the sell price for work performed.

Calculate Labor

Labor Rate Type *

Commercial ⓘ

	Travel Hours:	0.62
	Working Hours:	2.62
	Total Hours:	3.24

Billing Type	Hours	Rate ($)	Total ($)	Apply SA Discount
Minimum Charge	0.50	127.50	127.50	✓
Travel Time	0.75	85.00	63.75	✓
Regular Time	2.25	106.25	239.06	✓
Over Time	0	159.38	0.00	✓
Other Time	0	212.50	0.00	✓
Total	3.50		430.31	

Note - Clicking Save will add the times above to the invoice. If the 'Hours' field is blank or 0.00, the item will not be added. The 'Apply S/A Discount' field determines if a Service Agreement Discount will be applied to the Labor Rate if applicable.

Save

Work Order History Summary

A new field has been added to the Invoice Screen for entering a brief summary of the work performed. The summary will be displayed when viewing the History screen, so that you can quickly see the gist of the resolution without having to drill down into the invoice.

NOTE – Currently the ability to add the summary is available in the office version of ServiceFactor. This feature will be added to ServiceFactor Mobile on the next release.
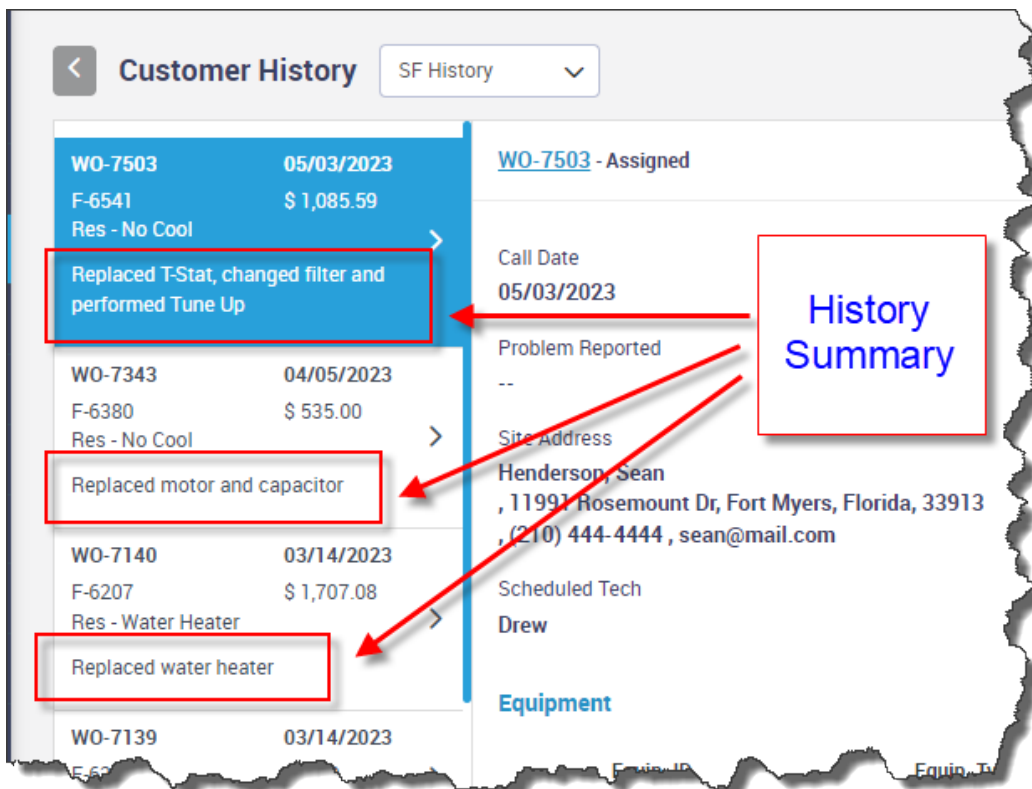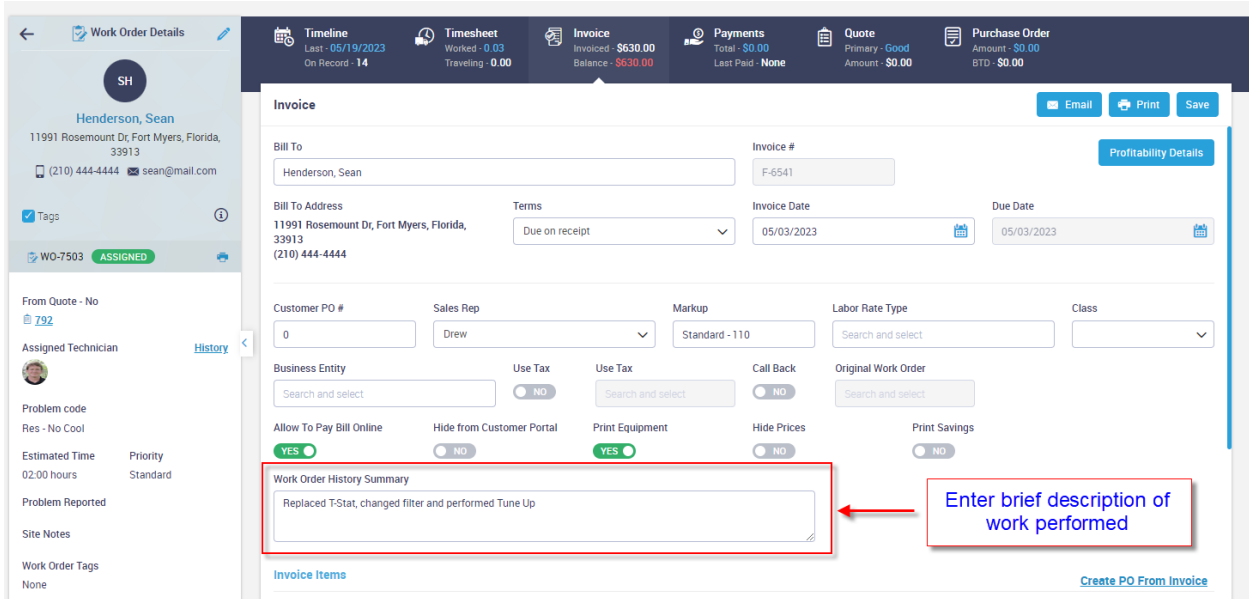
Work Order Listing can now be filtered by Dispatch Status Column

A new filter has been added to the Work Order listing that will allow you to filter by Dispatch Status.

NOTE - If you filter by the "Completed" status, you can find work orders that have a completed dispatch status, but the invoice is still open by clicking on the "Assigned" tab (this would be represented by a "Yellow" completed check mark on the dispatch board). If you want to see what invoices are in a completed status, but have not yet been posted to Accounting, click on the "Completed" tab (these would be the represented by a "green" completed check mark on the dispatch board).

Work Order Listing can now be sorted by the Dispatch Status Column

When viewing the Work Order listing screen, you now have the option to sort by the status column.

NOTE – If you are trying to find a specific dispatch status, use the new Dispatch Status filter in the advanced filters.

Ability to press the space bar in the CC field to display email addresses

If you press the space bar when you are in the CC field, a list of all email addresses assigned to the customer will be displayed.

NOTE – The ability to press the space bar has always been available in the "To" field.

Alternate Billed Invoices will list both the Site and Billing email addresses

If you have a customer that is a "sub customer of" another customer, or that you have alternate billed on the invoice screen, when you press the space bar in the 'To' or 'CC' field in the email screen. It will list email addresses for both the site and the parent customer.

Space Bar Reminder has been added to the Email screen

A reminder that you can press the space bar to view the email addresses has been added to the Email screen.

Project Management will include the 'Phase Name' in the description field when creating a Work Order

When you create a work order for a Project Management phase, the name of the phase / change order will be automatically added to the "Description" field of the work order. This will make it easier to identify the phase for which the work order was created if you use a generic problem code for Project Management work orders.

Tab name is "Install 16 Seer System"

When creating Work Order, the name of the Phase is automatically populated in the Notes field

If there are notes associated with the "Problem Code" selected, they will appear below the Phase Name
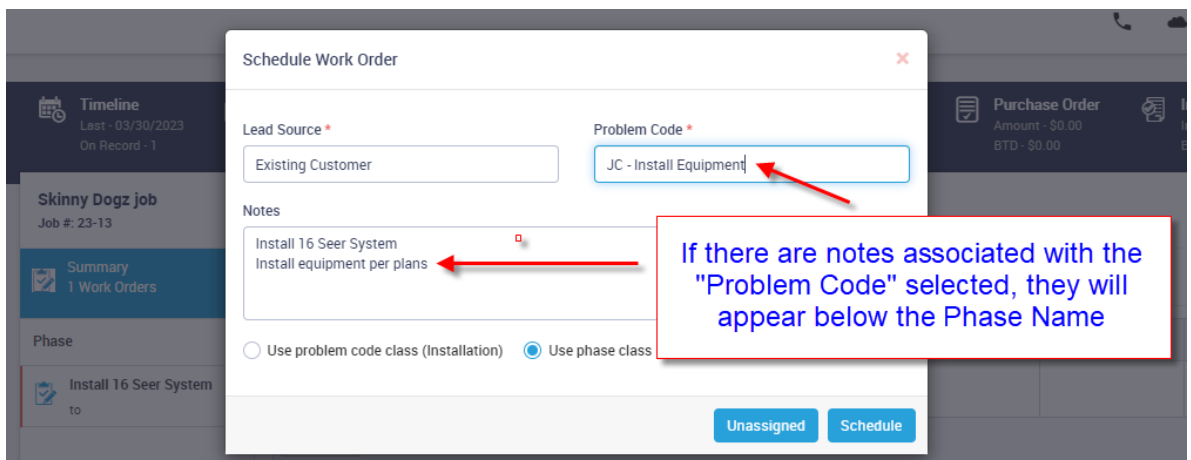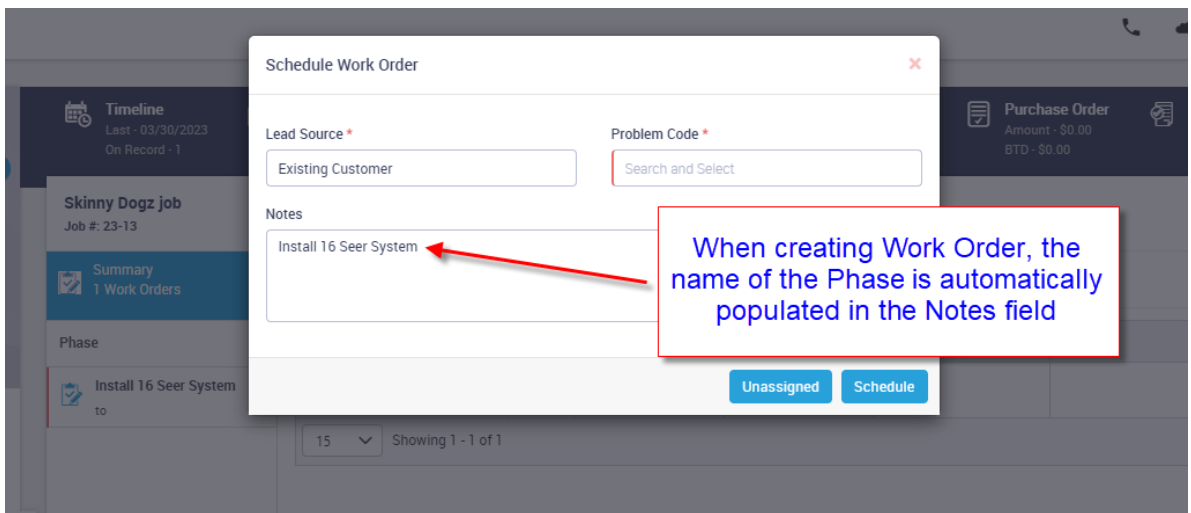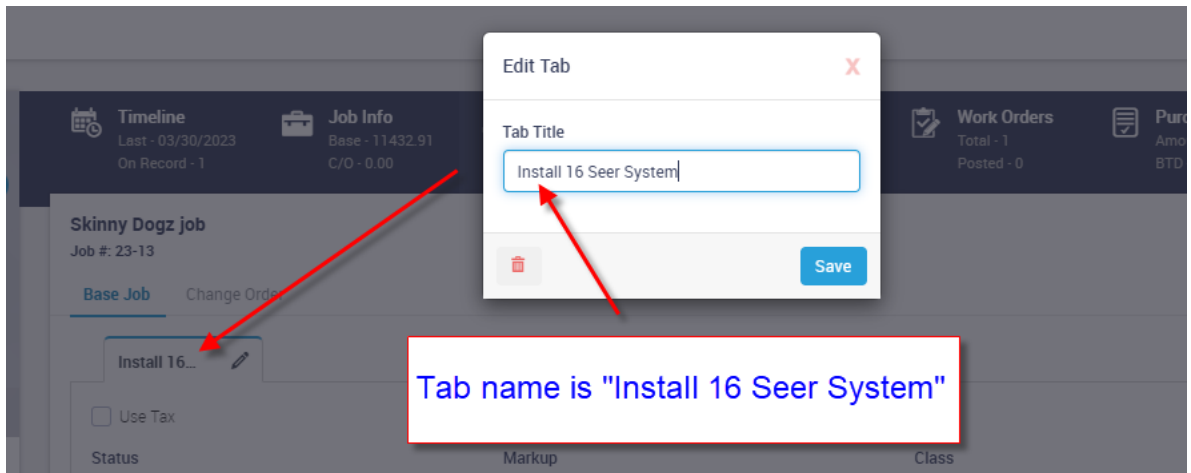
Service Agreements – Warning if trying to schedule an inspection too far in the future

If you try to create a Service Agreement Inspection that is more than 3 months out to be created, the system will give you a warning to verify that you really want to do this. This should help prevent creating the wrong inspection slip, or at least bring attention that you might have selected the wrong inspection to create. The system will allow you to continue and create the inspection if applicable.
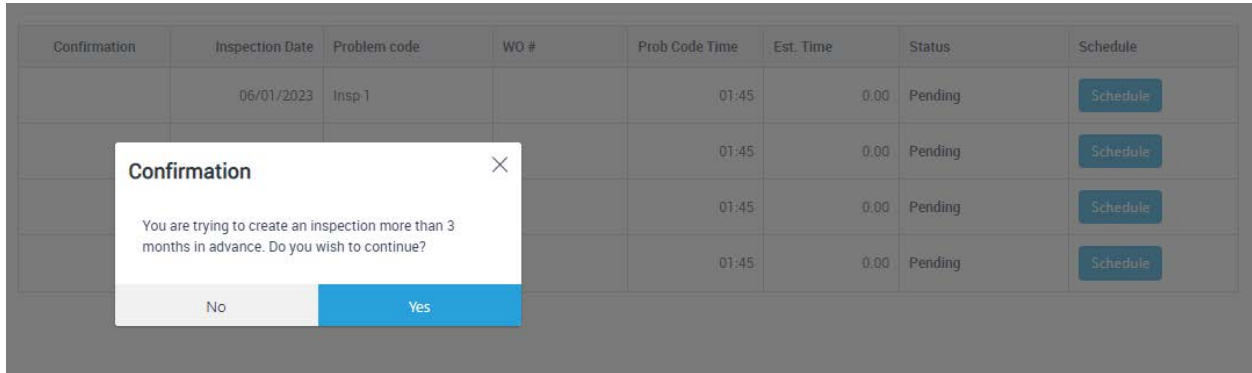
Invoices & Quotes – Dragging an item to a different line will now scroll up or down

When you want to change the order of an item on an Invoice or Quote, the system will now scroll up or down until you get to where you want to drop it. Prior to this release, you could only go as far as you could see on the screen and would have to drop the item, scroll the screen and then drag and drop again. This will make moving items a much better user experience.

Invoices – Now have the ability to print a 'Pre-Invoice'

You can now print a 'Pre-Invoice' from the Invoice 'Profitability' screen. A Pre-Invoice is a printed highly detailed report of the entire Work Order, which includes information from the Work Order, Timesheet Details, Invoice Details including the costs and sell prices of the items, the profitability and payment information if applicable.

Material Cost / Other Costs

Item	Description	Qty	Cost	Ext Cost	Rate	Amount
WIN020035	Install 50 Gallon Electric Water Heater	1.00	0.00	0.00	1,332.08	1,332.08
WTR050E	Rheem Professional Water Heater - Electric	1.00	895.00	895.00	0.00	0.00
				895.00		1,332.08

Labor Costs

Item	Description	OT	Qty	Cost	Ext Cost	Rate	Amount
WIN020035	Install 50 Gallon Electric Water Heater		1.00	0.00	0.00	375.00	375.00
	Joe Spell		0.25	43.50	10.87	0.00	0.00
	Joe Spell		2.77	43.50	120.49	0.00	0.00
					131.36		375.00

Invoice Summary

	Material	Labor	Total			
Sell	1,332.08	375.00	1,707.08	Subtotal		1,707.08
Cost	895.00	131.36	1,026.36	Discount		0.00
				Taxable Subtotal	0.00	
Profit	437.08	243.64	680.72	Tax		0.00
Profit %	32.81%	64.97%	39.88%	Total		1,707.08

Payments

Paid/Last Paid	Total Invoice	Amount Paid	Remaining Balance
05/19/2023	1,707.08	1,707.08	0.00

| Type	Date	Reference	Card Brand	Amount	Refunded
Cash NT	05/19/2023	Cash		500.00	0.00
Credit Card QB	05/19/2023	Visa 899753		1,207.08	0.00

Dashboard Top Cards – Quotes Section has been expanded to show Manually Handled values

The quotes section of the Top Cards has been expanded to show the quantity and value of quotes marked as 'Manually Handled'. NOTE - If a quote was marked as 'manually handled', the value and quantity will not be part of the 'Quotes Sold' values. Manually Handled indicates that the work was done on another medium, such as an existing work order or a project management job was manually created, etc. By showing the value of the Manually Handled quotes, you can get a total value of "quotes sold" for the particular month.

Dashboard Top Cards – Jobs Section has been expanded to show value of jobs approved for the month

The Project Management (Jobs Section) of the Top Cards has been expanded to show the quantity and value of Project Management jobs approved for the month, as well as the value that came from quotes. NOTE – The value of the Jobs Approved includes the value of jobs that were created from a Quote. The 'From Quote' value is informational only to give you an idea of the value of quotes that you turned into a Project Management job as opposed to creating a regular Work Order to do the work.
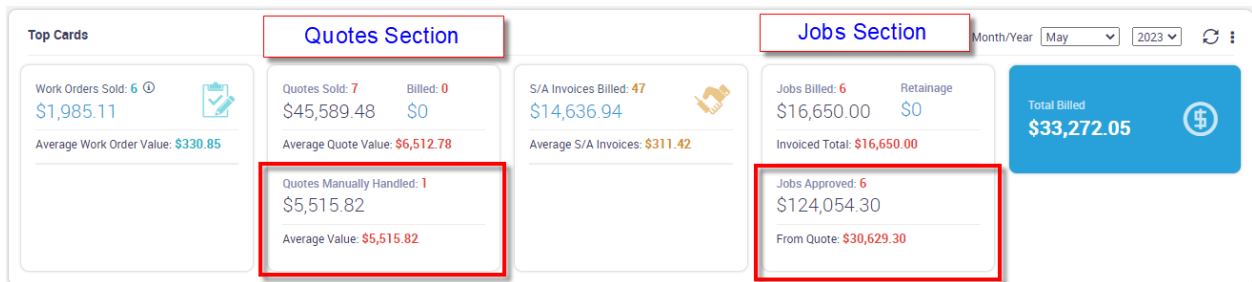
## Dashboard – Technician Score Card section is now sorted by highest to lowest sales

The Technician Score Card section is now sorted by the highest to lowest total sales, giving you a quick view of your top technician based on when the Dashboard was opened. The order of techs will constantly change based on performance.
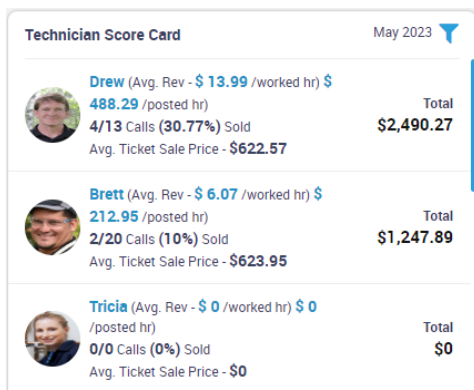
Dashboard – Revenue vs. Missed Revenue section – New speedometer graph has been added

A new speedometer has been added to the Revenue vs. Missed Revenue section that displays the Total Quoted value and the total Pending value for the time frame. The Total Quoted Value includes all quotes, whether they have been accepted or not (it does not include quotes that are in a 'Voided' status, but does include quotes in a 'Lost' Status). This will allow you to track the total value of quotes created for the time frame. The Pending value includes all quotes that are still in a Pending status, whether the quote is still active or has expired.

The 'Active Quoted' value has been modified to only show the value of quotes that have not expired for the time frame. NOTE – If a customer has 'Declined' a quote online and the expiration date has not been exceeded, the value will still be included in the 'Active Quoted', since you may still have an opportunity to save the sale. If you do not want declined quotes to be included in this value, change the status of the quote to "Lost".
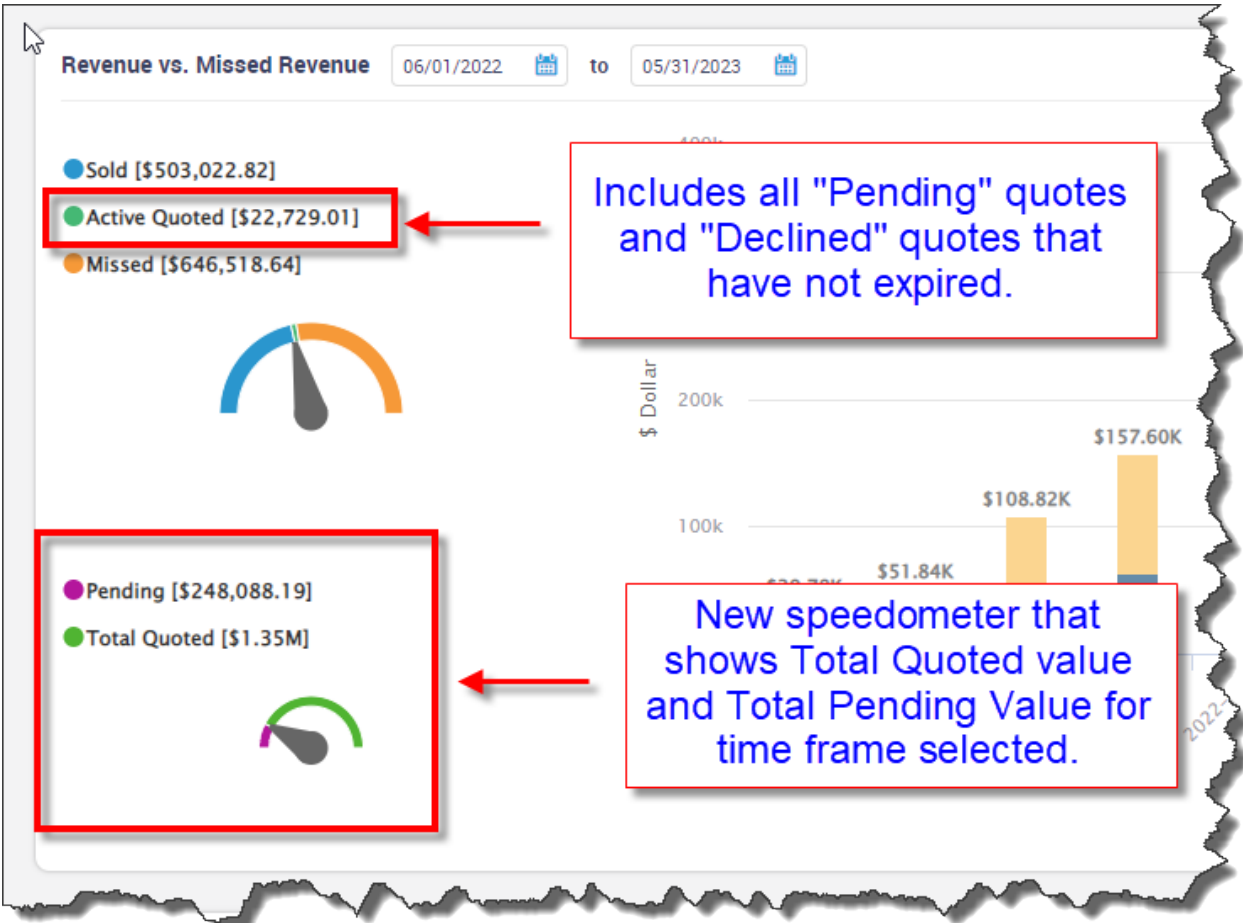
Dashboard – Service Agreement Section now shows the amount of Total Agreements, Current Agreements and Future Agreements

The Service Agreement section of the Dashboard will now show the number of Current and Future agreements in addition to the Total number of active agreements. A current agreement is an active agreement with a start date equal to or prior to today's date. A Future agreement is an agreement that has a start date after the current date. For example, if you manually renew a service agreement prior to its expiration date, a new agreement will be created and increase the number of Active Agreements, however, since the start date is in the future, it will not be included in the 'Current' count. Prior to this release, the Dashboard only showed the total number of active agreements, which did not break out current vs future agreements.

NOTE – The Active Agreement Section has 3 clickable sections. You can click on the Active Agreements section, the Current section and the Future section to display a list of the agreements that make up each section. The Scheduled Value of Service Agreements, Planned Inspections and Contract Expiring sections are also clickable and will list the agreements that make up each section.
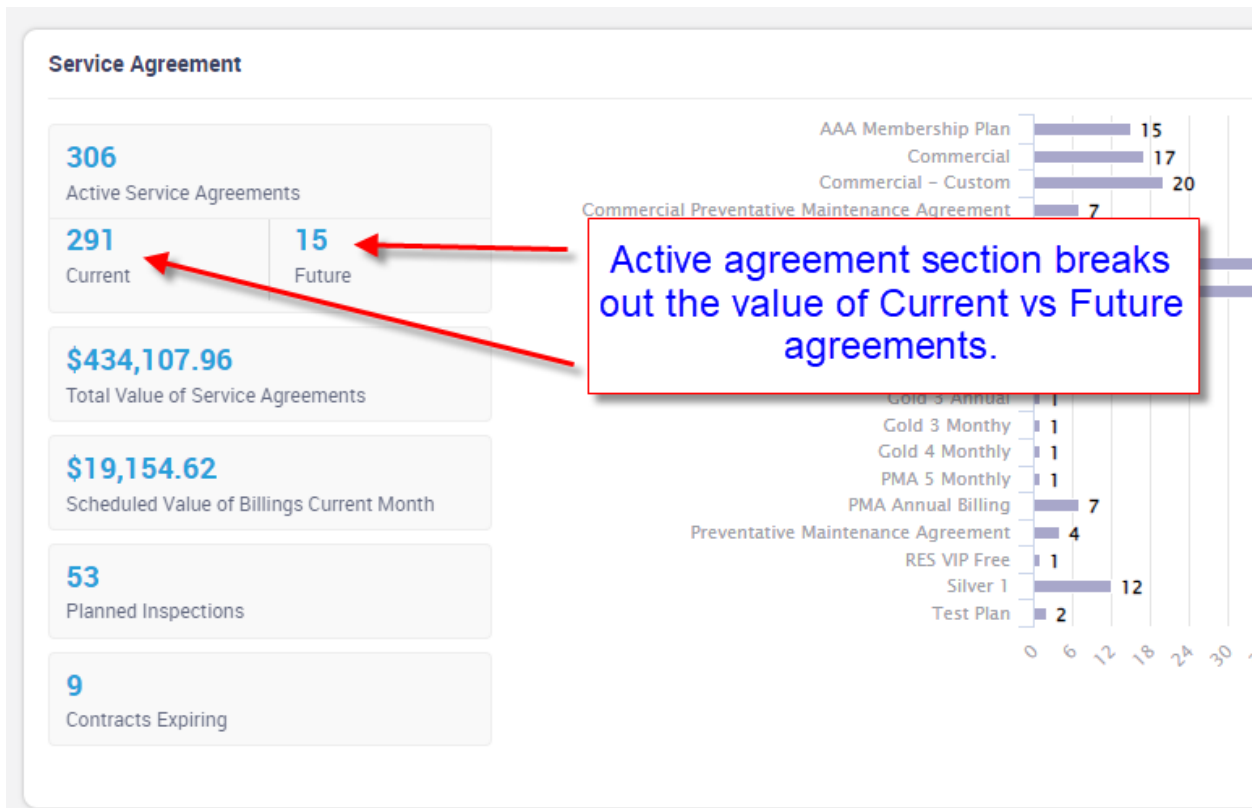
Reports – New Quick Post Batch Report has been added

A new Quick Post Batch Report has been added to the Accounting Reports menu. The Quick Post Batch Report will list invoices included in a Quick Post Batch along with their posted status.

Quick Post Batch Report

Invoice #	Invoice Date	Batch ID	Site Name	Subtotal	Tax	Total	Posted
A-6292	03/28/2023	107	Rawson, Cindy	1,200.00	87.00	1,287.00	TRUE
	Total Batch Count: 1			1,200.00	87.00	1,287.00	
A-6335	04/01/2023	108	Stonewood Grill	100.00	6.50	106.50	TRUE
A-6391	04/07/2023	108	Shuck, Gerry	175.00	11.38	186.38	TRUE
A-6404	04/11/2023	108	Anderson, Jerry	500.00	0.00	500.00	TRUE
F-2228	04/04/2023	108	Gomez, Hector	291.12	0.00	291.12	TRUE
F-6296	03/31/2023	108	Alan, Bill	416.33	14.75	431.08	TRUE
F-6299	03/31/2023	108	Alan, Bill	386.64	14.75	401.39	TRUE
	Total Batch Count: 6			1,869.09	47.38	1,916.47	
A-6412	04/12/2023	110	Duck, Daffy	275.00	0.00	275.00	TRUE
A-6413	04/12/2023	110	Gallup, Whitney	275.00	0.00	275.00	TRUE
	Total Batch Count: 2			550.00	0.00	550.00	
A-6330	04/04/2023	111	Richards, Sean	311.10	0.00	311.10	TRUE
	Total Batch Count: 1			311.10	0.00	311.10	
A-6388	04/07/2023	112	Best Buy	1,800.00	117.00	1,917.00	TRUE
A-6414	04/13/2023	112	O'Rourke, Lisa	175.00	15.09	190.09	FALSE
	Total Batch Count: 2			1,975.00	132.09	2,107.09	
F-6448	04/24/2023	116	Gateway Property Management	353.70	30.51	384.21	TRUE
	Total Batch Count: 1			353.70	30.51	384.21	
A-6449	04/	116	Gateway Property Management	3.00	33.90	47.90	TRUE

Reports – Work Order Profitability Report – 'Item Name' was added to the Filter

A new filter option has been added to the Work Order Profitability Report that will allow you to choose Work Orders that contain a particular 'Item". This will allow you to choose all work orders that contain a particular item to see if the work order was profitable. This is a good feature when you are selling a "loss leader" to determine if it is paying off in the long run.

Work Order Profitability Report

WO #	Site Name		Lead Tech		Total Cost	Total Sale	Profit Dollars	Profit %	Total Hours	Avg Revenue per Hour
	Invoice #	Business Entity		Lead Source	Sales Rep		Invoice Date	Invoice Resolution		
WO-6943	Pierson, Phil		Brett		97.53	1,277.00	1,179.47	92.36%	2.75	464.36
	F-6035			Existing Customer			02/15/2023	Work Completed		
WO-7046	White, Jordan		Brett		131.95	597.00	465.05	77.90%	2.00	298.50
	F-6125	Res HVAC Service		Existing Customer			02/27/2023	Work Completed		
WO-7432	McDonald's #14777		Drew		74.33	90.00	15.67	17.41%	2.18	41.28
	F-6468	Com HVAC Service		Existing Customer			05/16/2023	Diagnostic Only		
	Total Count: 3		Avg Invoice: 654.67		303.81	1,964.00	1,660.19	84.53%	6.93	283.41

FILTER BY   Clear All

Item Name/Number

Diagnostic 90

Zip Code

INVOICE STATUS

☑ None
☑ Diagnostic Only
☑ Work Completed
☑ Maintenance
☑ Warranty
☑ No Show
☑ Bill From Office
☑

Reports – Work Order Profitability Report export now includes the Site and Billing Name and Address

The Site Name and Address and Billing Name and Address have been added to the Work Order Profitability Report Export.

Reports – New filters have been added to the Contract Profitability Reports

The option to filter the Contract Profitability Reports (Detail Report and Summary Report) by Posted, Unposted and/or Completed Invoice statuses has been added. This will allow you to filter for only Posted Work Orders so that your profitability isn't skewed by an unposted billing work order that has not had any labor or material applied against it.

Project Management Reports – Report Total has been added to the Project Management Detail Labor Report

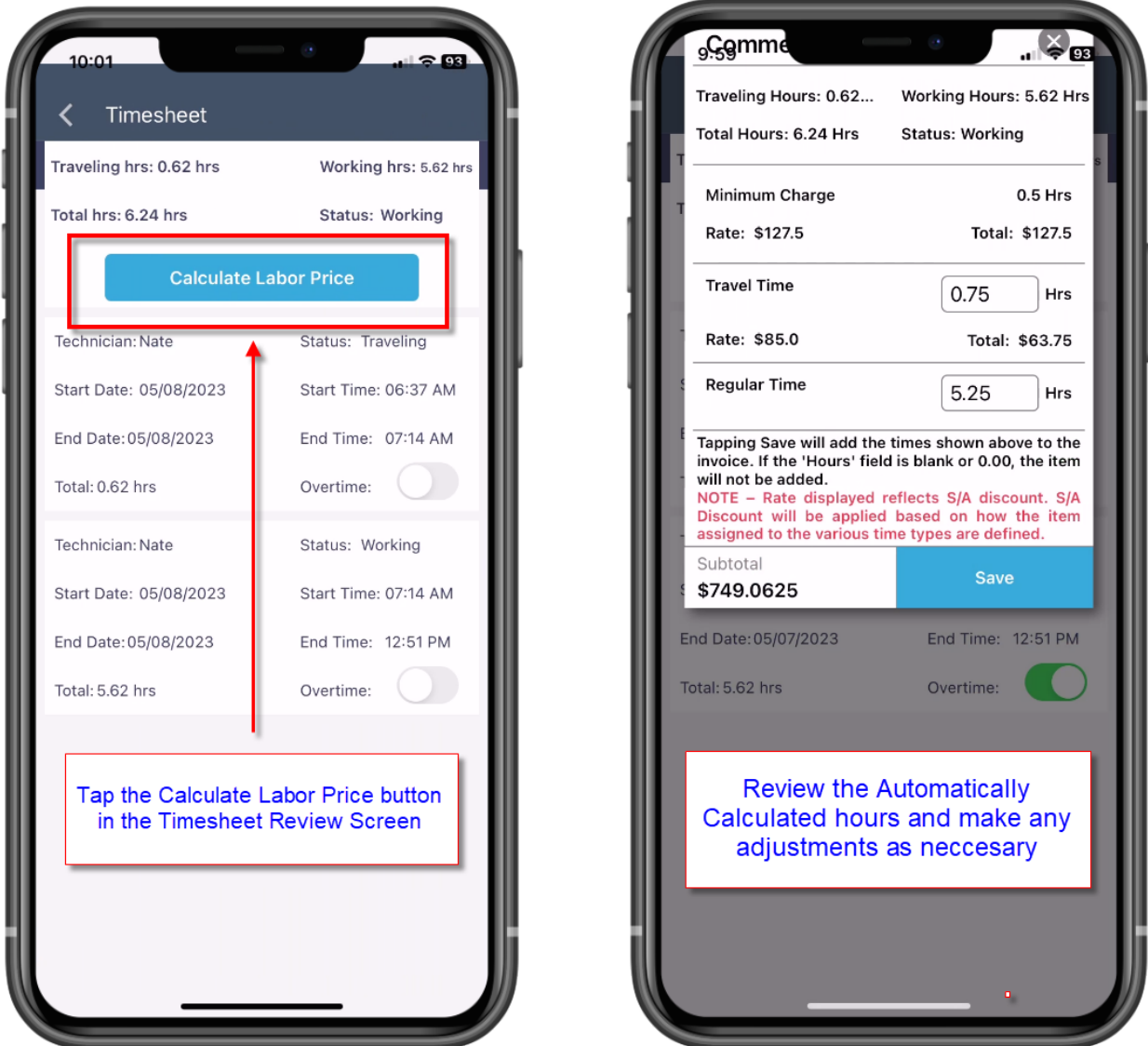## Reports – The Inventory Purchase Order Quantity Report now has the ability to Filter by a Category and subtotal by the item name

You can now filter by a category name and subtotal by the item name in the Inventor Purchase Order Quantity Report. This will allow you to easily see how often you have purchased items associated with a particular category and get a grand total of each item associated with the category that has been purchased.

Reports – The Item Usage Report now has the ability to Filter by a Category and subtotal by the item name

You can now filter by a category name and subtotal by the item name in the Item Usage Report. This will allow you to easily see how often you have sold items associated with a particular category and get a grand total of each item associated with the category that has been purchased. This will assist with determining what items you need to stock, or possibly retire.

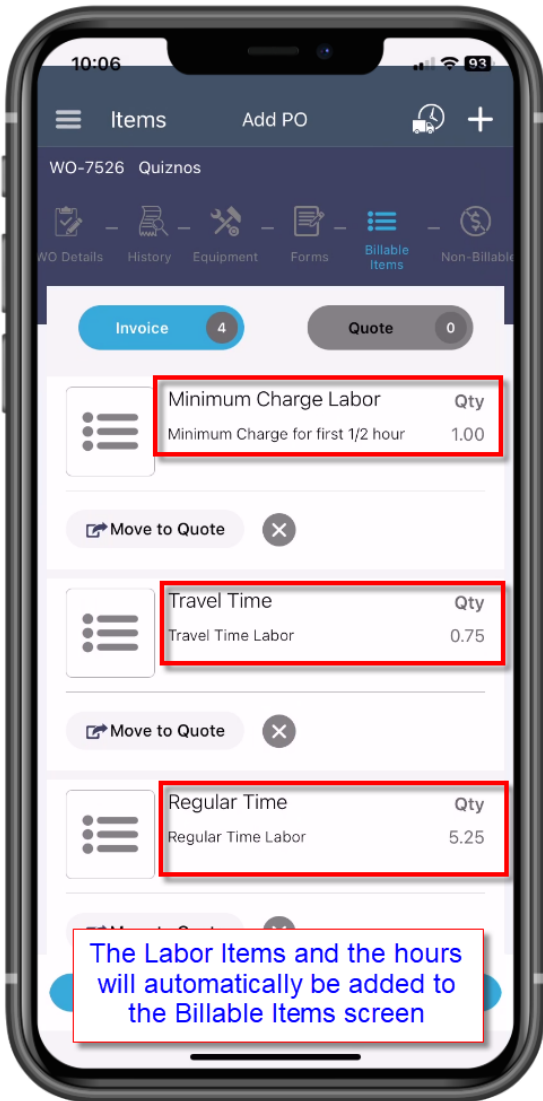# SF Mobile – Automatic Labor Sell Price Calculations

The Automatic Labor Sell Price Calculation feature has been added to ServiceFactor Mobile. This will allow the system to automatically calculate the labor sell price based on a Labor Rate assigned to the Customer or Work Order.

Tap the Calculate Labor Price button in the Timesheet Review Screen

Review the Automatically Calculated hours and make any adjustments as neccesary

When you save the calculation screen, the labor items associated with each time type will be automatically added to the Billable Items Screen.

NOTE – If the customer is set up as 'Bill from Office', only the Labor Items and the hours will appear on the Billable Items Screen. If the customer is not set up as 'Bill from Office', the labor sell prices will be displayed on the Billable Items Screen.

Example of Bill from Office
(Notice no Dollar Amounts)

Example of Regular Billing
(Notice the Dollar Amounts)

The Labor Items and the hours will automatically be added to the Billable Items screen
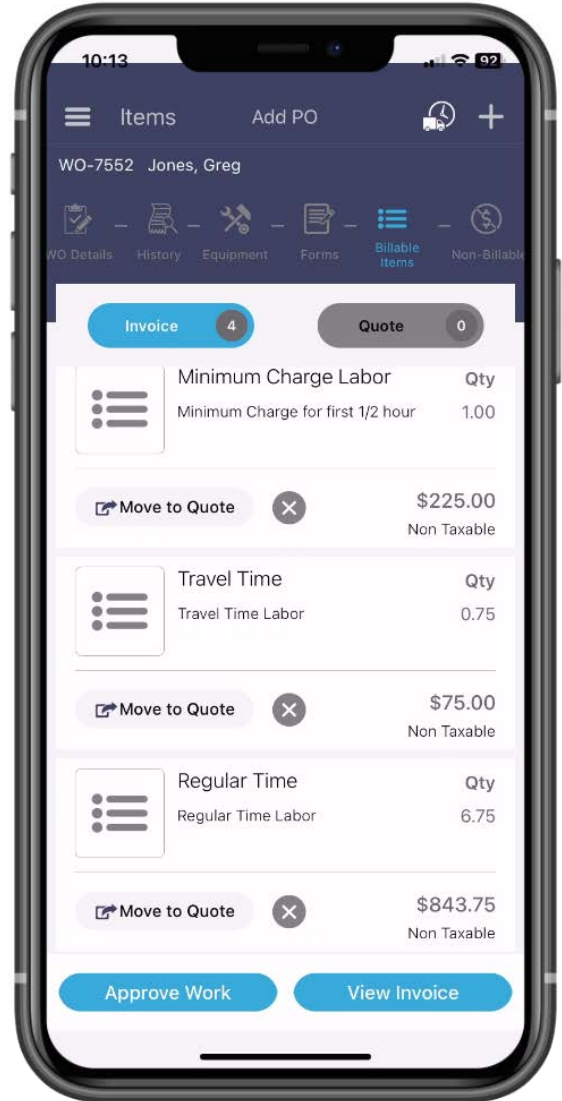
SF Mobile – Fixed an issue with emailing invoices on weekends

This release fixes an issue where under certain circumstances, technicians did not have the option to email invoices for work orders that were created via SF Mobile on weekends.