SF Release Notes: July 04, 2023

Profitability Screen has been added to the Customer File

A Profitability Screen has been added to the Customer File that will show you the Sales, Costs and Gross Profits for all posted invoices associated with a customer. The screen will give you the overall profitability for each type of work that you do which includes Regular Work Orders (typically associated with service calls), Invoice Only Invoices (such as over the counter sales), Quotes, Service Agreements and Project Management Jobs and will also break down each type of work by the material and labor sales, discounts given, and material and labor costs. For regular work orders, it will even break out your costs for Call Backs and Warranty. The profitability will even show you the total number of hours associated with each type of work. The profitability will be shown for the current period, prior period and all time. By default the current period will be the current year and the prior period will be last year, but you can change the period dates customize the timeframe for your needs. The profitability for a customer can also be printed, which will give you all of the information in a printed format.

	Timeline Last - 06/15/2023 On Record - 27		Work Orders Open - 0 Completed - 4		Equipment Total - 0 --		Agreements Active - 1 Total - 1		Invoice Invoiced - $18,956.60 Balance - $18,956.60		Quotes Total - 2 --		Job Total - 1 Open - 1		Profit

Customer Profitability

Current Period 01/01/2023 to 12/31/2023   **Prior Period** 01/01/2022 to 12/31/2022

Note - The Profit Screen only includes posted work orders and invoices

All Time

	Sales	Costs	Gross Profit	GP %	Hours
Regular WO	484.64	157.58	327.06	67.49%	2.00
Invoice Only	255.78	31.92	223.86	87.52%	0.00
Quotes	4,400.00	2,459.98	1,940.02	44.09%	4.52
Srv Agrmts	275.00	88.41	186.59	67.85%	1.75
Project Mgt	13,531.60	8,238.18	5,293.42	39.12%	14.90
Totals	**$18,947.02**	**$10,976.07**	**$7,970.95**	**42.07%**	**23.17**

Current Period

	Sales	Costs	Gross Profit	GP %	Hours
Regular WO	484.64	157.58	327.06	67.49%	2.00
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Regular Work Orders	All Time		Hours	Current Period		Hours	Prior Period		Hours
Regular WO Material Sale	237.94			237.94			0.00		
Regular WO Labor Sale	250.00			250.00			0.00		
Discount	3.30			3.30			0.00		
Regular WO Material Cost	59.58			59.58			0.00		
Regular WO Labor Cost	98.00		2.00	98.00		2.00	0.00		0.00
Regular WO Call Back Mat Cost	0.00			0.00			0.00		
Regular WO Call Back Labor Cost	0.00		0.00	0.00		0.00	0.00		0.00
Regular WO War Mat Cost	0.00			0.00			0.00		
Regular WO War Labor Cost	0.00		0.00	0.00		0.00	0.00		0.00
Gross Profit	327.06	67.49%	2.00	327.06	67.49%	2.00	0.00	0.00%	0.00

Invoice Only									
Invoice Only Material Sale	221.64			221.64			0.00		
Invoice Only Labor Sale	31.25			31.25			0.00		
Discount	2.89			2.89			0.00		
Invoice Only Material Cost	31.92			31.92			0.00		
Gross Profit	223.86	87.52%		223.86	87.52%		0.00	0.00%	

Quotes									
Quote Material Sale	4,029.30			4,029.30			0.00		
Quote Labor Sale	500.00			500.00			0.00		
Discount	129.30			129.30			0.00		
Quote Material Cost	2,238.50			2,238.50			0.00		
Quote Labor Cost	221.48		4.52	221.48		4.52	0.00		0.00
Gross Profit	1,940.02	44.09%	4.52	1,940.02	44.09%	4.52	0.00	0.00%	0.00

Service Agreements								
Service Agreement Material Sale	18.47			18.47			0.00	
Service Agreement Labor Sale	275.00			275.00			0.00	
Discount	18.47			18.47			0.00	
S/A Material Cost	2.66			2.66			0.00	
S/A Labor Cost	85.75		1.75	85.75		1.75	0.00	0.00
Gross Profit	186.59	67.85%	1.75	186.59	67.85%	1.75	0.00	0.00%	0.00

Project Management								
Project Management Sale	13,531.60			13,531.60			0.00	
PM Material Cost	7,612.38			7,612.38			0.00	
PM Labor Cost	625.80		14.90	625.80		14.90	0.00	0.00
Gross Profit	5,293.42	39.12%	14.90	5,293.42	39.12%	14.90	0.00	0.00%	0.00

Totals								
Total Sales	18,947.02			18,947.02			0.00	
Total Costs	10,976.07			10,976.07			0.00	
Gross Profit	7,970.95	42.07%	23.17	7,970.95	42.07%	23.17	0.00	0.00%	0.00

Customer File – Inactive Service Agreements will be hidden by default

When you view the Service Agreement Tab in the Customer File, expired agreements will be hidden by default, but can be viewed again by changing the Hide Inactive slider.

Customer File – Hyperlink to the Customer Detail Center has been added to the View Customer Screen

When you use the "View" option from the Customer Listing, you now have the option to drill directly into the Customer Center without having to exit back to the Customer List.

View option from Customer Listing

Click the Customer Center Hyperlink from View Customer Screen

Dispatch Board – When changing Dispatch Status to Incomplete, you can record a reason the dispatch is incomplete

When you change the Dispatch Status to Incomplete on the Dispatch Board, you will now be prompted with a reason that the call is incomplete. If you enter a reason, there will be an "Alert" symbol on the Dispatch Card showing you there is an Incomplete Alert associated with the Dispatch Status. Clicking on the Dispatch Status again will display the "Incomplete Reason".

In addition to the Alert showing on the Dispatch Card, there is also a new Tab for Alerts in the bottom section of the dispatch board when the Work Order Search is open that will list all of the records with an active alert. Once the Incomplete Alert has been acknowledged and/or addressed, the Alert can be removed so that it no longer shows in the list or on the Dispatch Card.

When you choose the Incomplete Status, You can enter a reason for Incomplete
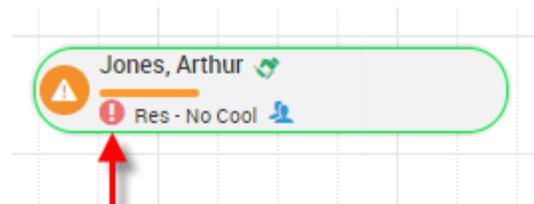
The Alert Symbol indicates that there is an Active Incomplete alert for the dispatch

Dispatch Board

| Day Shift | Full Shift | Toggle | | Today | < June 16 2023, Fri > | 📅 | | Day | Week | 7 Day |

Choose Board   All Service

All WO

| | 8 AM | 9 AM | 10 AM | 11 AM | 12 PM | 1 PM | 2 PM |

▼ Technicians

- DJ Dennis J...
- JC James Cr...
- J   Jared
- JS Joe Sleek
- Nate

Henderson, Bill
Insp 1

Jones, Arthur
Res - No Cool

Alert tab has been added to WO Assignment Listing at bottom of Dispatch Board

All Work Orders   Assigned   Unassigned   Completed   Posted   Canceled   **Alert**

Search By WO#, Customer ...   🔍   ⚙

WO # ⇕	Technician ⇕	Customer Name ⇕	Promised Appointment ⇕	Created Date ⇕	Task and Duration ⇕	Scheduled Date ⇕	Alert
WO-7625	Robert McDonalds	Machine Company	-	06/01/2023 12:03 AM	Insp 1 (01:30) Hrs	06/13/2023	👁 View
WO-6997	Nate	Jones, Arthur	02/14/2023 12:00 PM - 02:00 PM	02/14/2023 12:47 PM	Res - No Cool (02:00) Hrs	06/16/2023	👁 View

| 15 ▾ | Showing 1 - 2 of 2

Click the "View" link to view the alert

⟨⟨ ⟨ 1 ⟩ ⟩⟩

Sidebar right:
- CD WO- Cart Insp
- S   WO- Suit Com
- KG WO- Kelly Com
- CR WO- Con Insp
- AB WO- ABC Com
- W   WO- Wal Com
- RJ WO- Rog Insp

Dispatch Board

📞 ☁ 🎨

| Day Shift | Full Shift | Toggle | | Today | < Jun... | | Day | Week | 7 Day |

Choose Board   All Service

All WO

| | 8 AM | 9 AM | 10 AM | | | 1 PM | 2 PM |

▼ Technicians

- DJ Dennis J...
- JC James Cr...
- J   Jared
- JS Joe Sleek
- Nate

Jones, Arthur ✕

Remove Alert   🔘 NO

Reason for Incomplete

Need to order a motor
6/16/23 Mike ordered Motor on
PO# 1234

Done

Additional Notes and details can be added to the Reason Incomplete while viewing it.

Henderson, Bill
Insp 1

Jones, Arthur
Res - No Cool

All Work Orders   Assigned   Unassigned   Completed   Posted   Canceled   Alert

Search By WO#, Customer ...   🔍   ⚙

WO # ⇕	Technician ⇕	Customer Name ⇕	Promised Appointment ⇕	Created Date ⇕	Task and Duration ⇕	Scheduled Date ⇕	Alert
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WO-6997	Nate	Jones, Arthur	02/14/2023 12:00 PM - 02:00 PM	02/14/2023 12:47 PM	Res - No Cool (02:00) Hrs	06/16/2023	👁 View

Sidebar right:
- CD WO-770 Carter, D Insp 1 (
- S   WO-769 Suite 10 Com - Cl
- KG WO-769 Kelly Gre Com - Cl
- CR WO-762 Conana Insp 1 (
- AB WO-758 ABC Bui Com - Cl
- W   WO-751 Walgree Com - Cl
- RJ WO-751 Rogers,

Work Order Details

AJ

Jones, Arthur
7500 TREELINE, Ft Myers, Florida, 33913
📞 (239) 515-3456

Initial Incomplete reason as well as any additonal incomplete notes will be automatically added to the Work Order Timeline

Assigned Technician   History

Timeline
Last - 06/16/2023
On Record - 19

Timesheet
Worked - 1.66
Traveling - 0.18

Invoice
Invoiced - $76.25
Balance - $76.25

Payments
Total - $0.00
Last Paid - None

Quote
Primary - Good
Amount - $0.00

2023   Add Note   Keyword Search

06/16/2023

Nate
Reason for incomplete was updated: "Need to order a motor 6/16/23 Mike ordered Motor on PO# 1234"
12:50 PM

Nate
Workorder WO-6997 status was changed to Incomplete with reason: Need to order a motor
10:28 AM

Nate
Workorder WO-6997 status was changed to Working
10:28 AM

Dispatch Board

Jones, Arthur   ✕

Remove Alert   NO

Reason for Incomplete

Need to order a motor
6/16/23 Mike ordered Motor on PO# 1234

Day Shift   Full Shift   Toggle   Today   ‹ Jun

9 AM   10 AM   11 A   2 PM   3 PM

▼ Technicians

DJ   Dennis J...

JC   James Cr...

J   Jared

Jones, Arthur
Res - No Cool

Click the Dispatch Status to view the Alert from the Dispatch Board

Set the Slider to "Yes" to remove the Alert Symbol from the record

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Jones, Arthur
Res - No Cool

Alert Symbol is displayed when the Slider is set to "No"

Jones, Arthur
Res - No Cool

Alert Symbol no longer appears when you Remove the Alert

Dispatch Board – If the invoice is status is set to "Bill from Office", the completed check mark will be blue

If you have an invoice that is set to "Bill from Office", the check mark indicating that the Dispatch Status is completed will now be blue. This will allow you to quickly identify any Work Orders that need to have the invoice completed and sent from the office.
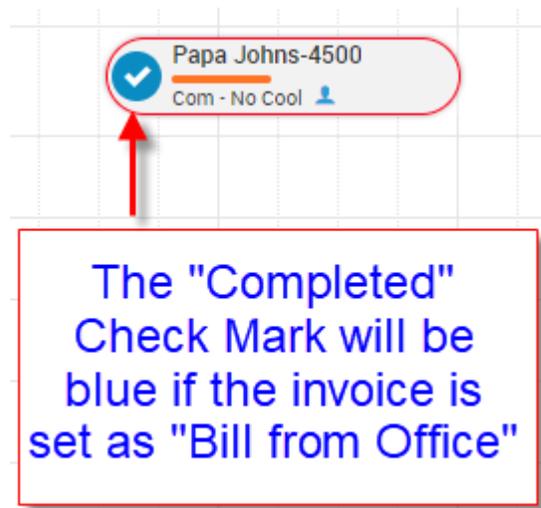
Work Order – The End Date and Time will appear in red if the End Date is different than the Start Date

If the End Date is different than the Start Date in the Timesheet tab, the date and time will appear in Red to bring attention that the dates are different. This can happen if a technician forgets to change their status to "Completed" when they finished working on a call the prior day and dispatch themselves to a new call the next day. In that case, the system will automatically enter the current date and time as their end date and time on their prior call.

Invoice – Review Status feature has been added to the Change Status Screen

A new feature has been added to the Change Status screen that will allow you to mark an invoice as needing to be reviewed before it can be posted to Accounting. This will allow someone in the office to complete the invoice and get it ready to be posted, but not allow it to be posted until the invoice has been reviewed and released. The Review statuses are as follows:

- **N/A** – Not Applicable – This will be the default status on all invoices and indicates that it does not need to be reviewed prior to Posting to Accounting.
- **Needs Review** – This status indicates that the invoice needs to be reviewed and will not allow it to be posted to accounting when it is in this status.
- **Hold** – This indicates that the invoice has been put on "Hold" and will not allow it to be posted to accounting when it is in this status. If this status is selected, you will have the option to enter the reason it is on hold, which will write the reason to the Timeline.
- **Reviewed** – This status indicates that the invoice has been reviewed and can be posted to accounting as long as all other posting requirements have been met.

Invoice Listing – A new "Review Status" tab has been added to the Invoice Listing

A new tab has been added to the Invoice Listing called "Review Status". This tab will show any invoices in a "Completed" status that have a Review Status of 'Needs Review', 'Hold' or 'Reviewed'. Once a 'Reviewed' invoice has been posted to Accounting, it will no longer be displayed in the list. NOTE – You can use the Advanced Filters to filter by a specific Review Status.

Invoice Listing – The "Review Status" has been added to the Advanced Filter

The "Review Status" has been added to the Invoice Advanced Filter. This will allow you to filter the invoices by a specific review status. If you select the "Lock Filter" option, the filter will stay active when leaving and returning to the Invoice Listing.
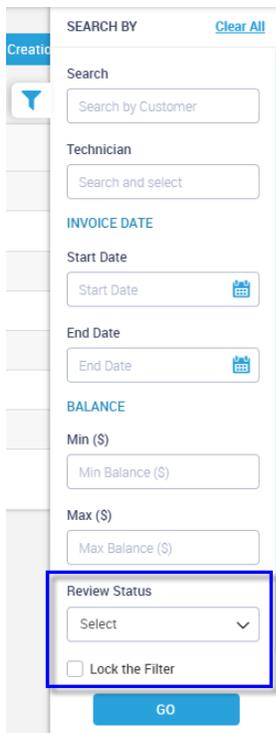
Invoice – Ability to Not Send "Work Completed" notification when changing Invoice Status from the office

A new slider has been added to the Change status screen that will allow you to NOT send the "Work Completed" notification if you so desire. At the bottom of the Change Status screen is a slider called "Send Default Notifications". If you set it to "No", the Work Completed notification will not be sent. **NOTE** – The "Work Completed" notification can be found in the Communication Templates.

Payments – Note field has been added to Payments

When adding a Payment to an invoice, a new Notes Field has been added so that you can record information about the payment. For example, if you receive a check with a different name than the vendor, or if the invoice was paid from a credit company, etc., you can record notes about it for future reference. The notes will appear in the Payment screen associated with the particular payment.

Note will appear in the Payment Record on the Payments Screen

Purchase Orders – Ability to add attachments has been added

The ability to add attachments to a Purchase Orders has been added to ServiceFactor. The PO Attachments will be located at the bottom of the item listing on the PO.

To add an attachment, enter a description and choose the attachement by clicking the paper clip icon.

Purchase Orders – Search Field will now include the Vendor Name

In addtion to the Purchase Order Number column, the PO Search field will also search the Vendor Name column.

Purchase Orders – Advanced Filters have been added

Advanced Filters have been added to the Purchase Orders that will allow you to filter by PO Type, PO Dates, PO Delivery Dates, PO Status and Vendor Invoice Number. It will also allow you to "Lock the Filter" so that the selection set will not be reset when leaving and re-entering the PO Menu Option.

Purchase Orders – Clicking the Billed to Date amount will list the Invoices Associated with the PO and allow you to view the Vendor Bill

You can now click on the Billed to Date value and view any invoices associated with the Purchase Order. If you click on an Invoice Number, you can view the Vendor Bill.

Project Management – New column has been added to the Job Invoice for the current billing amount

A new option has been added to Project Mangement Invoices (Job Invoices) that will allow you to display the break down of the current value due for each schedule of value. Prior to this release, the schedule of value would show the total amount being billed for each line item and the invoice total at the bottom would display the amount due for the current invoice. Now you can show the "$ Net this Invoice" on each line item.

Set the "Print Net this Invoice" slider to "YES" in order to display the "$ Net this Invoice" on each line item of the Invoice

The "$ Complete Column" shows the total value of work completed

The "$ Net this Invoice" column shows the amount of total completed being billed on this invoice

Project Mangement – Retainage Text and Column will be suppressed on Printed/Emailed Job Invoices if Retainage is not being withheld on the job

If you print or email a Project Management Job Invoice, the Retainage column and Retainage line in the totals section will be suppressed if Retainage has not been withheld on the job. This should eliminate unneccesry questions about retainage from recipients of Job Invoices.

Invoice

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

Invoice Date:	06/19/2023
Invoice No:	J-434
Due Date:	06/19/2023
Sales Rep:	Dennis Jordan
Job PO:	
Job No.	23-19
G C Job No.	

Bill To Address	Site Address
Jordan White	Jordan White
4562 Green Apple Dr	4562 Green Apple Dr
Fort Myers, FL 33903	Fort Myers, FL 33903

Description	Total Value	% Complete	$ Complete
Deposit upfront	5,000.00	50.00000	2,500.00
Remaining Total Contract	6,432.91	0.00000	0.00

Contract Amount	$ 11,432.91
21.87 % Billed Complete (Including this invoice)	$ 2,500.00
Previously Invoiced	$ 0.00
Subtotal	$ 2,500.00
Tax	$ 0.00
Total due this invoice	**$ 2,500.00**

This invoice has no Retainage, therefore it does not reference retainage

LIMITED WARRANTY: All materials, parts, and equipment are warranted by the manufacturers' or suppliers' written warranty only. All labor performed by the above-named company is warranted for 30 days or as otherwise indicated in writing. The above-named company makes no other warranties, express or implied, and ... are not authorized ...

Description	Total Value	% Complete	$ Complete	$ Retainage
Deposit upfront	5,000.00	50.00000	2,500.00	250.00
Remaining Total Contract	6,432.91	0.00000	0.00	0.00

Contract Amount	$ 11,432.91
21.87 % Billed Complete (Including this invoice)	$ 2,500.00
Less 10.00 % Retainage (This invoice)	$ < 250.00 >
Previously Invoiced	$ 0.00
Subtotal	$ 2,250.00
Tax	$ 0.00
Total due this invoice	**$ 2,250.00**

Reetainage column and totals will be displayed if invoice has retainage

Service Agreements – Ability to clear the original PO Number on a Renewed Service Agreement

A new check box has been added to the Service Agreement screen that will allow the system to clear the Purchase Order Number upon renewal. Prior to this release, the system would maintain the same PO # upon renewal. This will give you the option to re-use the same PO# or clear it upon renewal.

Communication Template – The "Payment Link" insert code has been added to S/A Invoice and Offie Invoice templates

The "Payment Link" insert code has been added to both the Service Agreement Invoice and Office Invoice Templates. The "Payment Link" will still automatically print (if applicable) at the bottom of the S/A Invoice and Office Invoices, but this will allow you to add the link anywhere you want in the Email Template. For example, If you have a lot of text in your S/A Invoice and Office Invoice Templates, some customers may not scroll to the bottom of the Email to see that there is a link to click on. By adding the Payment Link insert code at or near the top of the invoice, it should increase the online payment usage, cutting down on phone calls and improving collection times.

Dashboard – Graph in the Service Agreement section can now scroll

The Graph in the Service Agreement section will now scroll if you have more Service Agreements than will fit in the designated space. Prior to this all of the lines would be displayed, but the text to the left of the bar graph would not line up properly if you have many agreements.

Helpful Tip – You can click on any of the bars to see the details of which service agreements make up the totals.

Reports – Review Status Report

A new "Review Status Report" has been added to the Work Order Reports under the Accounting heading. The Review Status Report produces a list of any invoices that are in a "Completed" status and will list the "Review Status" of the particular invoice. Review statuses are assigned in the Change Status option in the Invoice Screen. By default, all Invoices will have a status of 'N/A - Not Applicable', but can be changed to 'Needs Review', 'Hold', or 'Reviewed'. Only invoices in a 'N/A - Not Applicable' or 'Reviewed' status can be posted to Accounting. If an invoice is in an 'Assigned' or 'Posted' status, it will not appear on this report.
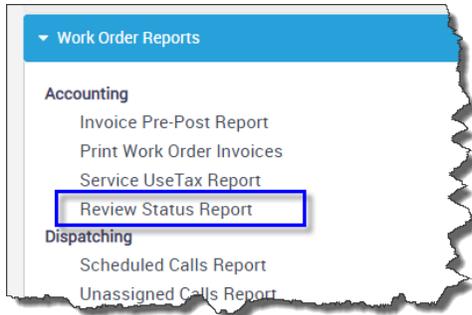
Invoice #	Invoice Date	Customer Name	Review Status	Resolution Status	Business Entity	Invoice Amt	Tax	Total
A-6549	06/21/2023	Walgreens	Hold	Maintenance		1,250.00	103.13	1,353.13
A-5683	06/05/2023	Moss, Lisa - Main	Needs Review	Maintenance		632.15	40.31	672.46
F-6721	06/16/2023	Wells, Christy	Reviewed	Work Completed	Res HVAC Service	340.64	0.00	340.64
F-6702	06/12/2023	Rivers, Lisa	Needs Review	Bill from Office	Res HVAC Service	160.00	10.40	170.40
F-6727	06/16/2023	Wilson, Jennifer	Needs Review	Work Completed	Com Plumbing Service	1,178.76	25.84	1,204.60
J-434	06/19/2023	White, Jordan	Hold	Work Completed		2,500.00	0.00	2,500.00
		Count: 6				6,061.55	179.68	6,241.23

Reports – Payment Note field has been added to the COD Payment report

The new 'Notes' field has been added to the COD Payment Report if you choos to show the payment detail.

ServiceFactor Mobile – The contact name will now be displayed with the phone numbers and email addresses

When you tap the 'Call', 'Text' or 'Email' buttons on the Work Order Details screen, the contact name associated with the phone numbers and email addresses will be displayed below the appropriate phone number, SMS (text) number or email address. This will make it easier to know what phone number to use or email address to use when there are more than one.
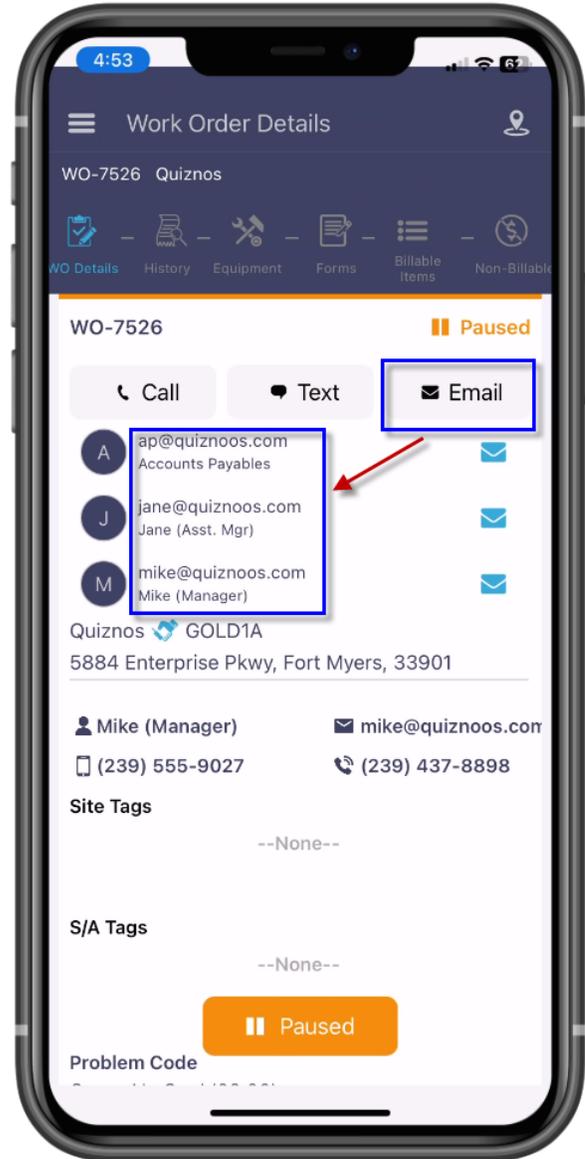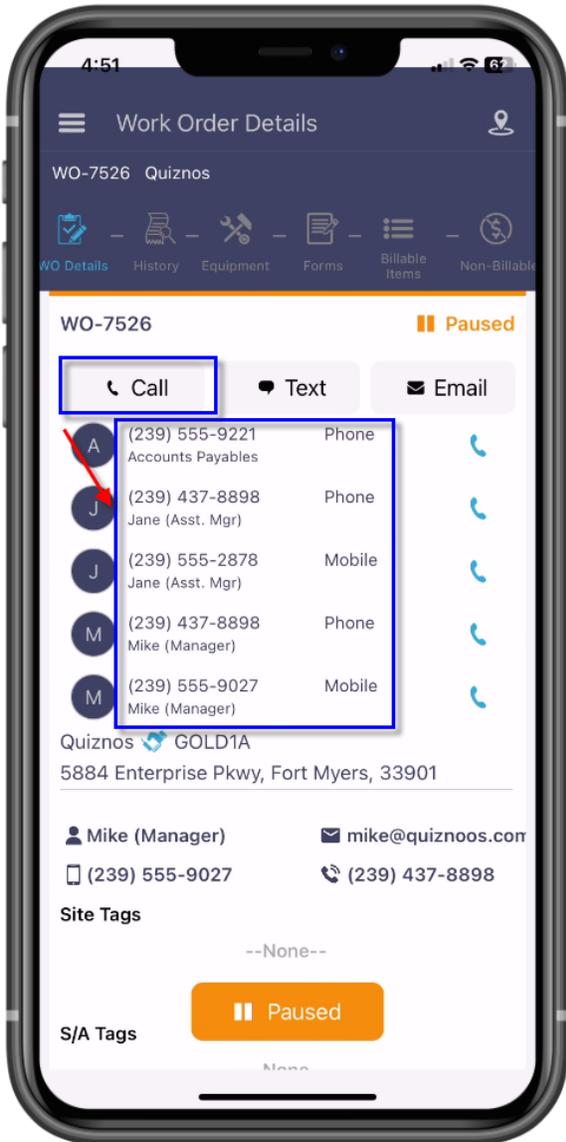
ServiceFactor Mobile – Work Order History Summary

A new Work Order History Summary field has been added to SF Mobile that will allow the technician to enter a brief description of the work that was performed. The WO History Summary field will automatically popup when the technician is finished entering items on the Work Order and taps the "View Invoice" button. The WO History Summary is for internal use only and will not appear on the invoice. If the technician wants to edit the WO History Summary after they have entered it, they can do so from the "Print Options" screen. The WO History Summary will appear in the History Screens in both the Office version and Mobile version of ServiceFactor.

NOTE – If you do not want the WO History Summary Screen to automatically appear when tapping the View Invoice button, you can disable the feature per employee in the Employee File.
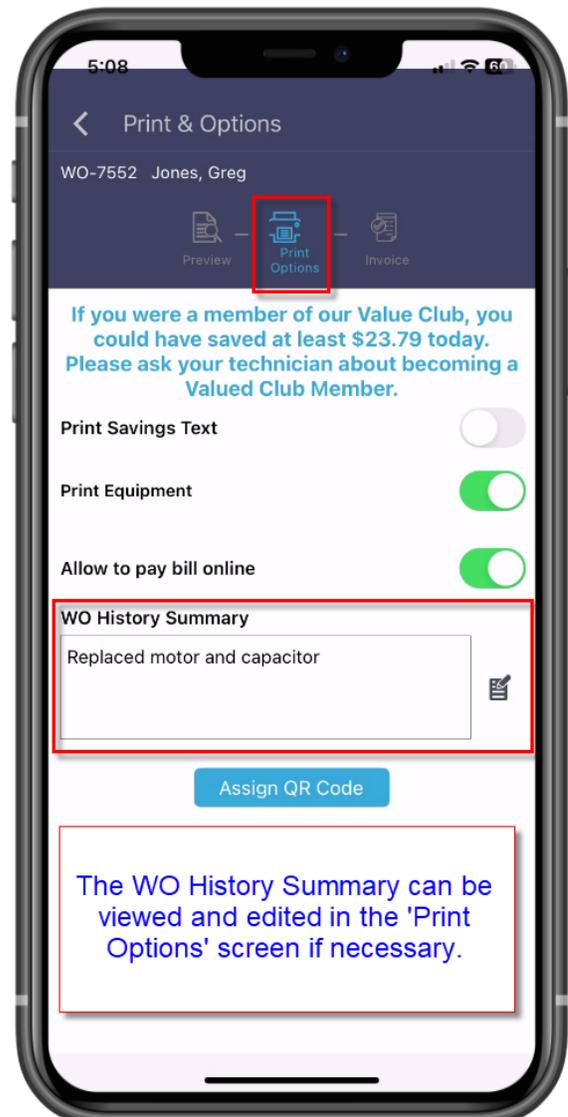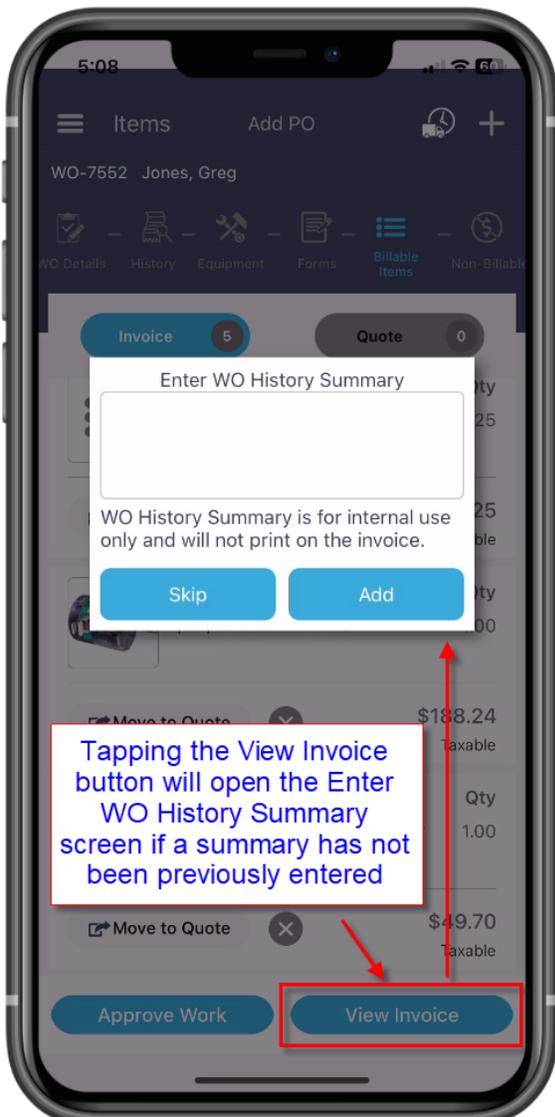
SFServiceFactor Mobile – WO History Summary from prior Work Orders can be viewed in the History Screen

The WO History Summary will appear on SF Mobile History screen. The description will appear without having to expand the history to view the summary.
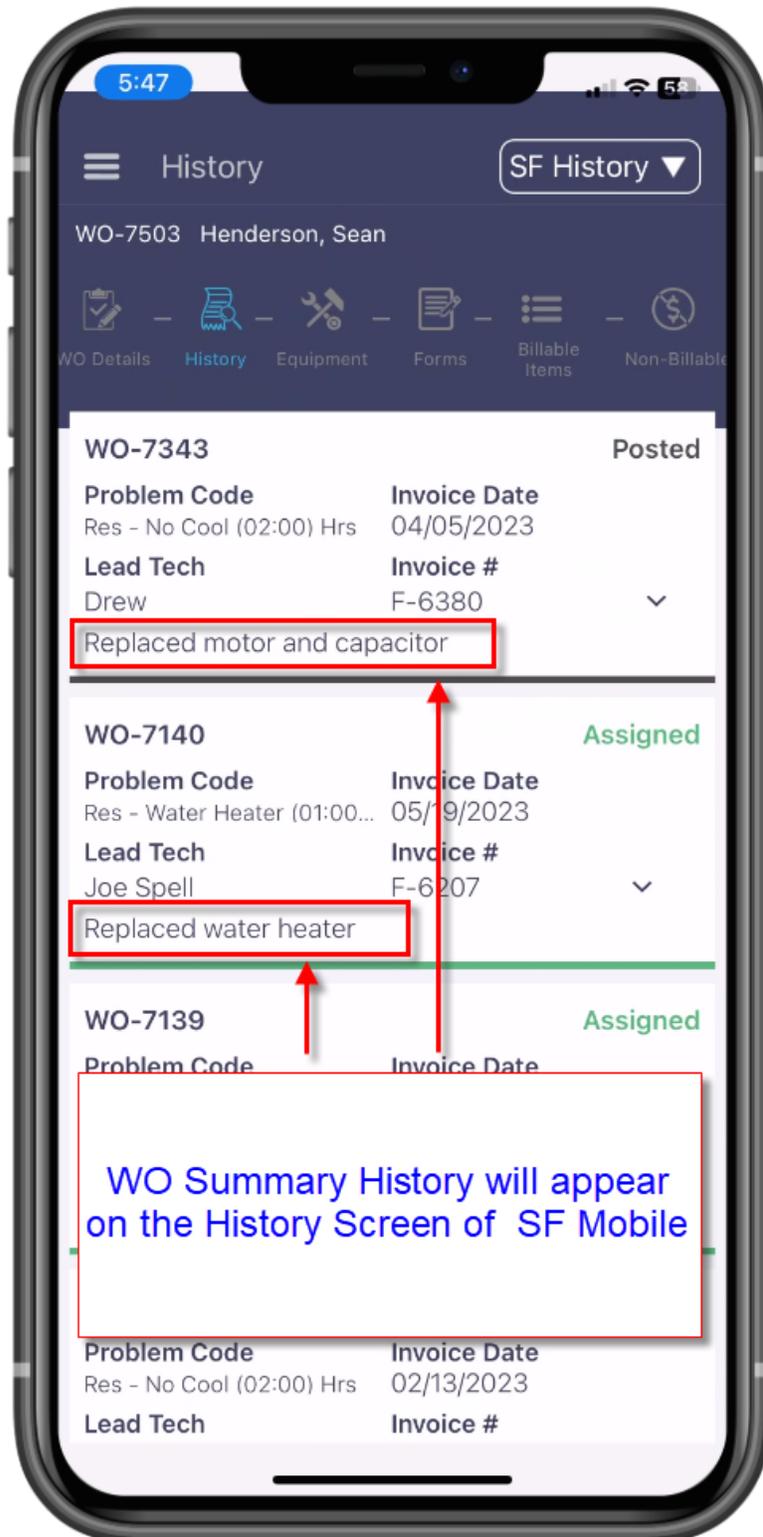
ServiceFactor Mobile – You can now enter a reason that a call has been marked incomplete

When you change the dispatch status to Incomplete in SF Mobile, you will be prompted to enter the reason that you marked the call Incomplete. This will enter an alert on the dispatch card and can be viewed in the office as to why the call was marked incomplete.
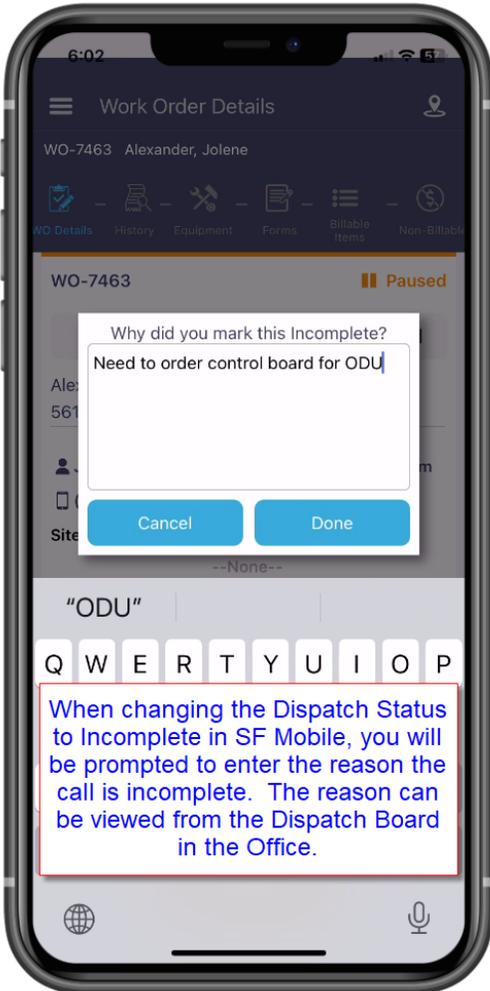
When changing the Dispatch Status to Incomplete in SF Mobile, you will be prompted to enter the reason the call is incomplete. The reason can be viewed from the Dispatch Board in the Office.
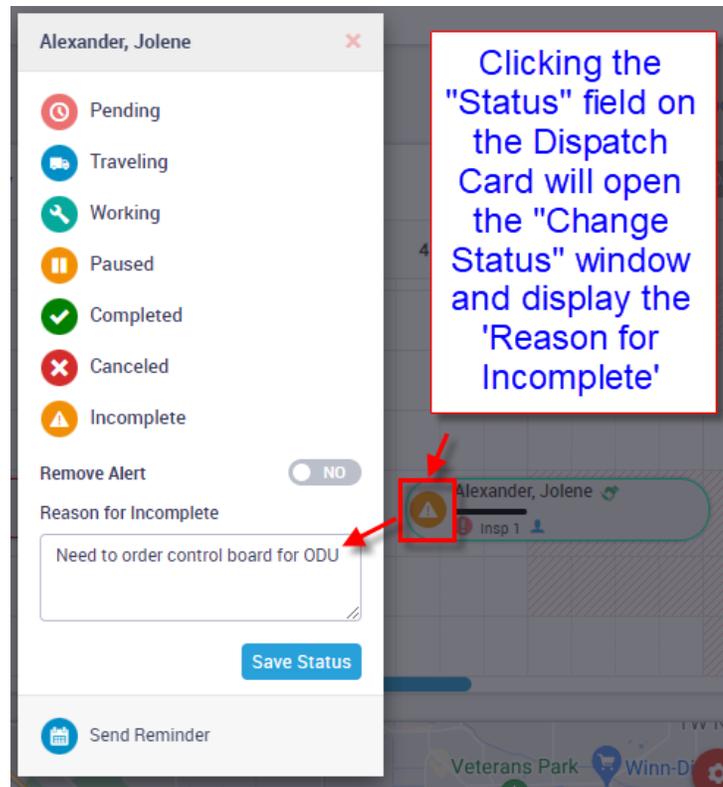
Clicking the "Status" field on the Dispatch Card will open the "Change Status" window and display the 'Reason for Incomplete'
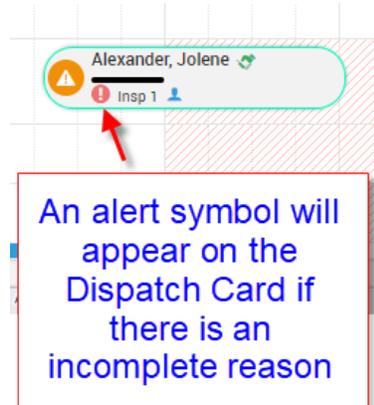
An alert symbol will appear on the Dispatch Card if there is an incomplete reason
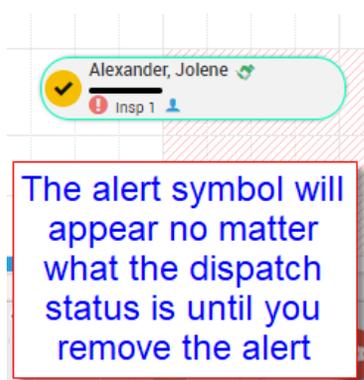
The alert symbol will appear no matter what the dispatch status is until you remove the alert