

# 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 Print

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

	All Time					Current Period				
	Sales	Costs	Gross Profit	GP %	Hours	Sales	Costs	Gross Profit	GP %	Hours
Regular WO	484.64	157.58	327.06	67.49%	2.00	484.64	157.58	327.06	67.49%	2.00
Invoice Only	255.78	31.92	223.86	87.52%	0.00	255.78	31.92	223.86	87.52%	0.00
Quotes	4,400.00	2,459.98	1,940.02	44.09%	4.52	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	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	13,531.60	8,238.18	5,293.42	39.12%	14.90
<b>Totals</b>	<b>\$18,947.02</b>	<b>\$10,976.07</b>	<b>\$7,970.95</b>	<b>42.07%</b>	<b>23.17</b>	<b>\$18,947.02</b>	<b>\$10,976.07</b>	<b>\$7,970.95</b>	<b>42.07%</b>	<b>23.17</b>

	All Time	Hours	Current Period	Hours	Prior Period	Hours
<b>Regular Work Orders</b>						
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
<b>Gross Profit</b>	<b>327.06</b>	<b>67.49%</b>	<b>327.06</b>	<b>67.49%</b>	<b>0.00</b>	<b>0.00%</b>
<b>Invoice Only</b>						
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	
<b>Gross Profit</b>	<b>223.86</b>	<b>87.52%</b>	<b>223.86</b>	<b>87.52%</b>	<b>0.00</b>	<b>0.00%</b>
<b>Quotes</b>						
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
<b>Gross Profit</b>	<b>1,940.02</b>	<b>44.09%</b>	<b>1,940.02</b>	<b>44.09%</b>	<b>0.00</b>	<b>0.00%</b>

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.

Timeline: Last - 02/01/2023, On Record - 39  
 Work Orders: Open - 5, Completed - 3  
 Equipment: Total - 3  
 Agreements: Active - 1, Total - 6  
 Invoice: Invoiced - \$2,675.48, Balance - \$1,364.63  
 Quotes: Total - 0  
 Job: Total - 0, Open - 0

Hide Inactive: YES

By default, only active Agreements will be displayed.

Silver 1 - SA-258-04  
02/01/2023 - 01/31/2024

Inspection Schedule

Confirmation	Inspection Date	Problem code	WO #	Prob Code Time	Est. Time	Status	Schedule
	05/01/2023	Insp 1		01:45	0.00	Pending	Schedule
	10/02/2023	Insp 1		01:45	0.00	Pending	Schedule

Timeline: Last - 02/01/2023, On Record - 39  
 Work Orders: Open - 5, Completed - 3  
 Equipment: Total - 3  
 Agreements: Active - 1, Total - 6  
 Invoice: Invoiced - \$2,675.48, Balance - \$1,364.63  
 Quotes: Total - 0  
 Job: Total - 0, Open - 0

Hide Inactive: NO

Change Slider to view Inactive Agreements

Silver 1 - SA-258-04  
02/01/2023 - 01/31/2024

Inspection Schedule

Confirmation	Inspection Date	Problem code	WO #	Prob Code Time	Est. Time	Status	Schedule
	05/01/2023	Insp 1		01:45	0.00	Pending	Schedule
	10/02/2023	Insp 1		01:45	0.00	Pending	Schedule

Silver 1 - SA-258-03  
02/03/2022 - 01/31/2023

Gold 1 Annual - SA-282  
10/01/2019 - 09/30/2020

Silver 1 - SA-258-02  
02/01/2021 - 01/31/2022

Silver 1 - SA-258-01  
02/01/2020 - 01/31/2021

Silver 1 - SA-258  
02/01/2019 - 01/31/2020

# 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.

All Customers (1) Filters Applied: Rivers Clear All

QB Sync Print Export

All Customers Contract No Contract Show Customer Hierarchy Add Rivers

Name	Address	Phone	Mobile	Email	Join Date	Status	Create Work Order	Action
Rivers, Lisa	11851 Rosemount Dr Fort Myers Florida 33913	(239) 555-1455	(239) 707-0243		12/19/2022	Active	Work Order	View

15 Showing 1 - 1

View option from Customer Listing

View Customer Customer Center Edit

LR

Customer Type: Residential

Is a Sub Customer of: Search and select

Display Name: Rivers, Lisa

Tags: Card on File

Site Information Payment Settings Customer Portal

SITE ADDRESS

Address Line 1: 11851 Rosemount Dr

Address Line 2: Address Line 2

26°34'18.0"N 81°45'16.2"W

Customer Details

Rivers, Lisa

11851 Rosemount Dr, Fort Myers, Florida, 33913

(239) 555-1455 (239) 707-0243

Tags: Card on File

Additional Information History

Payment Status: Overdue \$8,236.50 Open \$8,236.50

Site Tags: Card on File

Agreement: SA-642 - Gold 1 Annual

Equipment

Timeline

06/14/2023: Nate Invoice E-6702 was changed from \$0.00 to \$170.40 for the Workorder WO-7687

06/12/2023: TMS Admin Equipment Id AC002 was changed to AC200

TMS Admin Equipment AC002 was created for the customer

TMS Admin Invoice E-6703 : \$0.00 was created for the Workorder WO-7688

TMS Admin Workorder WO-7688 was created

Attachments(1)

Nate added 'Picture of house' 04/28/2023 11:47 AM

## 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.

Jones, Arthur

- Pending
- Traveling
- Working
- Paused
- Completed
- Canceled
- Incomplete

Remove Alert  NO

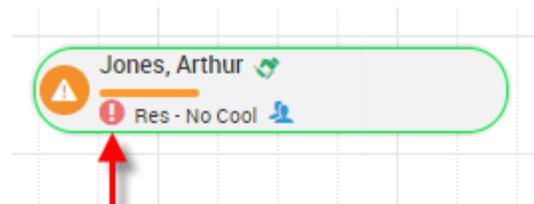
Reason for Incomplete

Need to order a motor

Save Status

Send Reminder

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

Choose Board All Service

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

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	<a href="#">View</a>
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	<a href="#">View</a>

15 Showing 1 - 2 of 2

Click the "View" link to view the alert

### Dispatch Board

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

8 AM 9 AM 10 AM 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

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

Jones, Arthur

Remove Alert  NO

Reason for Incomplete

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

Done

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	<a href="#">View</a>
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	<a href="#">View</a>

**Work Order Details**

**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

Assigned Technician: Jones, Arthur  
7500 TREELINE, Ft Myers, Florida, 33913  
(239) 515-3456

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

**Dispatch Board**

Day Shift Full Shift Toggle Today < Jun

Choose Board All Servi

Day Week 7 Day All WO

▼ Technicians

- D.J. Dennis J...
- JC James Cr...
- J Jared

Jones, Arthur ✓ Res - No Cool

Remove Alert  NO

Reason for Incomplete

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

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

Jones, Arthur ✓

Res - No Cool

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

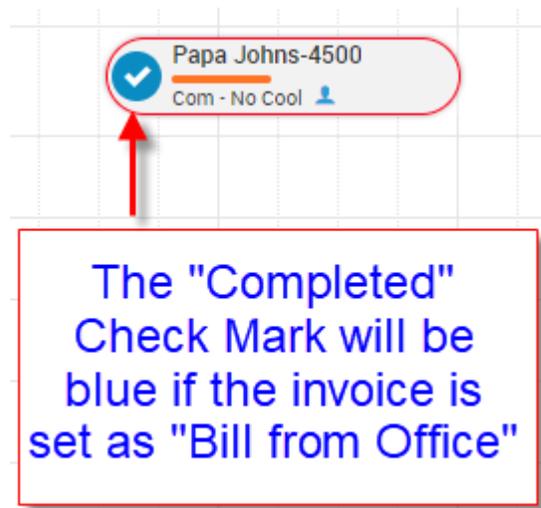
Jones, Arthur ✓

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.

End Date and Time will appear in Red if the End Date is different than the Start Date

Technician	Status	Start Date	Start Time	End Date	End Time	Class	Total	Overtime
James Cr...	Traveling	06/15/2023	03:21 PM	06/15/2023	03:39 PM	Commercial	0.30 hrs	NO
James Cr...	Working	06/15/2023	03:39 PM	06/16/2023	08:13 AM	Commercial	16.57 hrs	NO

## 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.

Change Status

Review Status

Needs Review

N/A - Not Applicable

Needs Review

Hold

Reviewed

None

Diagnostic Only

Wor

Mai

War

No S

Bill

Voic

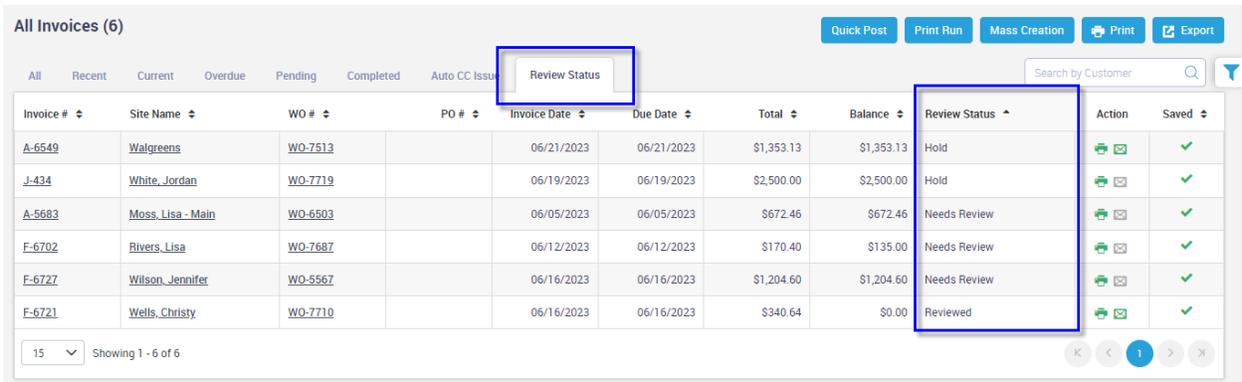
Enable Quick Post  NO Send Default Notifications  NO

Post to QBO & Close Post to QBO Save Status

New Review Status has been added to the Change Status screen. If status is 'Needs Review' or 'Hold', you will not be able to post the Invoice to Accounting

## Invoice Listing – A new “Review Status” tab has been added to the Invoice Listing

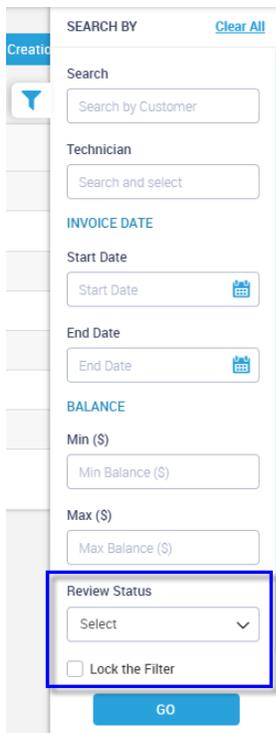
A new tab has been added to the Invoice Listing called “Review Status”. This tab will show any invoices in a “Completed” status that have a Review Status of ‘Needs Review’, ‘Hold’ or ‘Reviewed’. Once a ‘Reviewed’ invoice has been posted to Accounting, it will no longer be displayed in the list. NOTE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



Invoice #	Site Name	WO #	PO #	Invoice Date	Due Date	Total	Balance	Review Status	Action	Saved
A-6549	Walgreens	WO-7513		06/21/2023	06/21/2023	\$1,353.13	\$1,353.13	Hold		✓
J-434	White, Jordan	WO-7719		06/19/2023	06/19/2023	\$2,500.00	\$2,500.00	Hold		✓
A-5683	Moss, Lisa - Main	WO-6503		06/05/2023	06/05/2023	\$672.46	\$672.46	Needs Review		✓
F-6702	Rivers, Lisa	WO-7687		06/12/2023	06/12/2023	\$170.40	\$135.00	Needs Review		✓
F-6727	Wilson, Jennifer	WO-5567		06/16/2023	06/16/2023	\$1,204.60	\$1,204.60	Needs Review		✓
F-6721	Wells, Christy	WO-7710		06/16/2023	06/16/2023	\$340.64	\$0.00	Reviewed		✓

## 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.



SEARCH BY [Clear All](#)

Search

Search by Customer

Technician

Search and select

INVOICE DATE

Start Date

End Date

BALANCE

Min (\$)

Max (\$)

Review Status

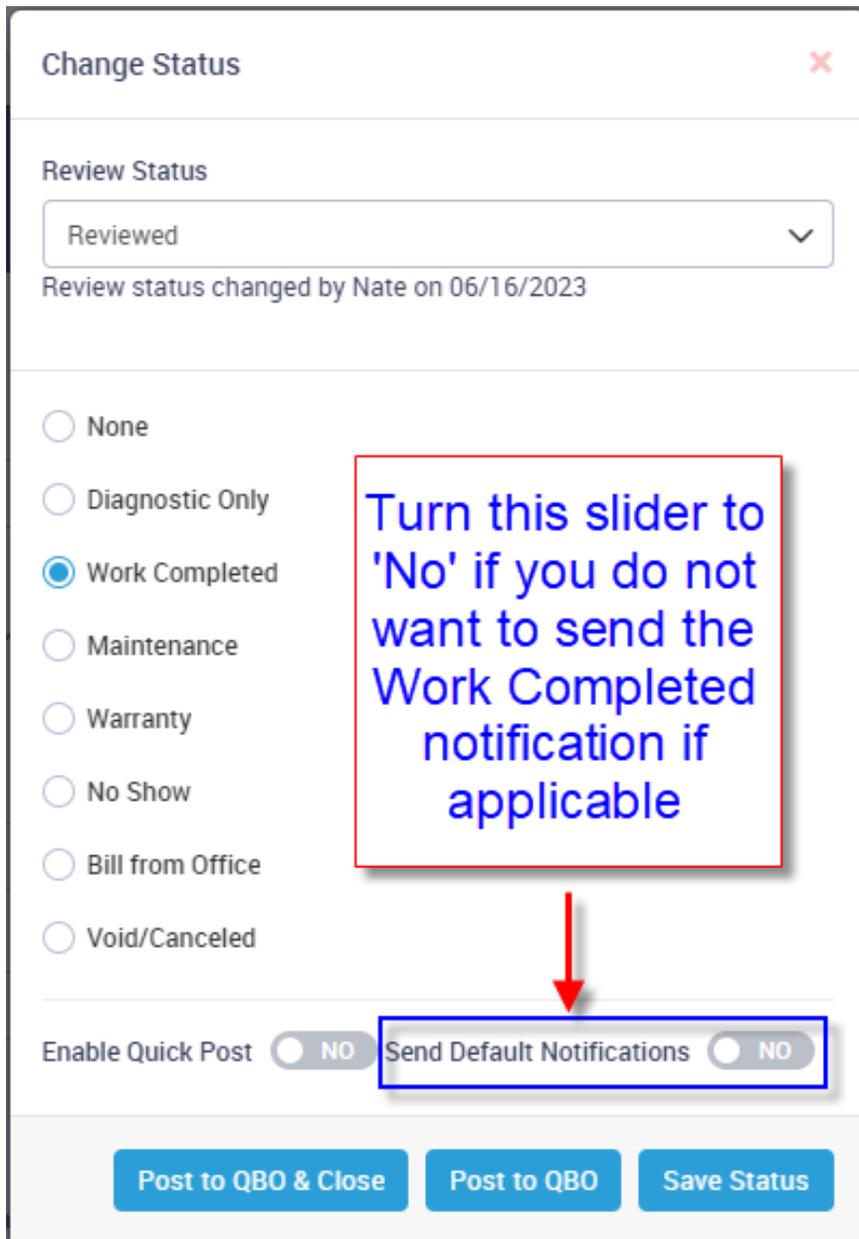
Select

Lock the Filter

GO

## 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.



The screenshot shows the 'Change Status' interface. At the top, there is a title bar with 'Change Status' and a close button. Below this is a 'Review Status' section with a dropdown menu currently set to 'Reviewed' and a confirmation message: 'Review status changed by Nate on 06/16/2023'. A list of radio button options follows: 'None', 'Diagnostic Only', 'Work Completed' (which is selected), 'Maintenance', 'Warranty', 'No Show', 'Bill from Office', and 'Void/Canceled'. At the bottom of the form, there are two toggle switches: 'Enable Quick Post' (set to 'NO') and 'Send Default Notifications' (set to 'NO'). A blue box with white text and a red border is overlaid on the 'Send Default Notifications' slider, containing the instruction: 'Turn this slider to 'No' if you do not want to send the Work Completed notification if applicable'. A red arrow points from this box down to the 'Send Default Notifications' slider. At the very bottom, there are three blue buttons: 'Post to QBO & Close', 'Post to QBO', and 'Save Status'.

## 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.

### Payment

Date  
06/19/2023

Payment Reference: 6455      Amount: 8589.28

Notes  
Check came from K & T Property Management

Cancel      Submit

Work Order Details

Timeline: Last - 06/19/2023, On Record - 12

Timesheet: Worked - 0.00, Traveling - 0.00

Invoice: Invoiced - \$8,589.28, Balance - \$0.00

Payments: Total - \$8589.28, Last Paid - 06/19/2023

Quote: Primary - Good, Amount - \$0.00

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

#### Payment (Invoice No - F-6691)

Paid/Last Paid: 06/19/2023      Total Invoice: \$8589.28      Amount Paid: \$8589.28      Remaining Balance: \$0.00

Type	Date	Reference	Notes	Card Brand	Amount	Action	Refunded
Check QB	06/19/2023	6455	Check came from K & T Property Management		\$8589.28		

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 attachment by clicking the paper clip icon.

The screenshot displays the ServiceFactor Purchase Order interface. At the top, there are tabs for "Purchase Order" and "Receiving Slip", along with "Email" and "Print" buttons. The main form contains various fields for PO details: Ordered By (William), Created On (06/06/2023), Last Date Changed (06/19/2023), Billed to Date (\$0.00), Purchase Order # (PO-1262), PO Date (06/06/2023), Expected Delivery Date (06/06/2023), Ship to (Don't Print), Status (Open), PO Type (Service), Location / Job / Work Order (WO-6503 / Moss, Lisa - Main), Phase / Change Order (Search and select), Work Order (Search and select), Preferred Vendor (Johnstone Supply), Email (wmosborn@me.com), Markup (Select), Class (Residential), and Notes. There are also radio buttons for "No Charge" and "Mark PO as Void" (both set to NO), and a "Use Cost from Item File for Markup?" option (set to NO). Below the form is a table with columns: Item, Description, Order Qty, Total Received, Distributed Quantity, Rate, Amount, Unit Sell, and Class. The table contains one row: PO Parts, OEM Control Board for [redacted], 1.00, 0.00, 0.00, 258.0000, \$258.0000, 0.00, Residential. A "Search and select" button is below the table, and the total amount is \$258.00. At the bottom, there is an "Attachments(1)" section with a text input field "Enter Description" and a paper clip icon. Below this is a list of attachments, including one titled "Nate added 'Picking Slip'" dated 06/19/2023 03:39 PM. At the very bottom are "Cancel", "Save", and "Save & Receive" buttons.

Item	Description	Order Qty	Total Received	Distributed Quantity	Rate	Amount	Unit Sell	Class
PO Parts	OEM Control Board for [redacted]	1.00	0.00	0.00	258.0000	\$258.0000	0.00	Residential

**Attachments(1)**

Enter Description

Nate added 'Picking Slip'  
06/19/2023 03:39 PM

Cancel Save Save & Receive

PO Attachments can be added/viewed at the bottom of the PO below the list of items being purchased.

## Purchase Orders – Search Field will now include the Vendor Name

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

Purchase Order (222)

Search field now searches by the Vendor Name column in addition to PO Number

Print Export

carrier

PO Number	Vendor	Location	PO Type	Expected Delivery Date	PO Date	Price	Billed To Date	Status
PO-1266	Carrier	WO-7713	Service	06/16/2023	06/16/2023	\$200.00	\$200.00	Complete
PO-1264	Carrier	Main	Inventory	06/14/2023	06/14/2023	\$71.75	\$0.00	Complete
PO-1263	Carrier	Main	Inventory	06/15/2023	06/14/2023	\$2,125.80	\$0.00	Complete
PO-1267	Carrier	WO-7628	Service	06/09/2023	06/09/2023	\$74.45	\$74.45	Complete

## 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.

SEARCH BY [Clear All](#)

Search

Search by PO

To Date

PO Type

PO DATE

Start Date

End Date

PO DELIVERY DATE

Start Date

End Date

PO Status

Vendor Invoice No

Lock the Filter

GO

# 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.

Purchase Order (12) Print Export

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PO Number	Vendor	Location	PO Type	Expected Delivery Date	Billed To Date	Billed To Date	Status
PO-1229	Trane	WO-7505	Service	05/03/2023	\$43.88	\$43.88	Complete
PO-1228	Trane	23-22	Project Management Job	05/05/2023	\$5,228.22	\$5,228.22	Complete
PO-1227	Johnstone Supply	WO-7496	Service	05/02/2023			Complete
PO-1226	Johnstone Supply	WO-7460	Service	05/02/2023			Open
PO-1225	Grainger	WO-7459	Service	05/02/2023			Open
PO-1224	Grainger	WO-7459	Service	05/02/2023			Open
PO-1223	Grainger	WO-7459	Service	05/02/2023	\$50.00	\$0.00	Complete
PO-1222	Johnstone Supply	WO-6476	Service	05/02/2023	\$17.00	\$17.00	Complete
PO-1221	Johnstone Supply	WO-6476	Service	05/02/2023	\$50.00	\$50.00	Complete
PO-1220	Johnstone Supply	WO-5569	Service	05/01/2023	\$0.00	\$0.00	Open

Click the Billed to Date value to view Invoices

Click on an Invoice Number to view the Vendor Bill

**Billed To Date Detail**

Invoice No	Invoice Date	Invoice Total
654	05/02/2023	\$2,500.00
689	06/19/2023	\$2,728.22

Vendor Bill - (Project Management Job PO #: PO-1228) Print Save

Receiving Slip Vendor Bill

PO Type Project Management Job	Location / Job / Work Order 23-22 / Office & Dock Plbg	Phase / Change Order Office & Doc	Vendor Trane
-----------------------------------	---	--------------------------------------	-----------------

Date Received 05/02/2023	Packing Slip # Packing Slip Number	Invoice Total 2728.22	Invoice # 689
Terms Net 30	Invoice Date 06/19/2023	Due Date 07/19/2023	

**Items**

Item	Description	Order Qty	Received	Total Received	Rate	Amount	Unit Sell	Class	Complete
PO Parts	RTU 25 ton	2.00	1.00	2.00	2500.0000	\$2,500.0000	0	Installation	<input checked="" type="checkbox"/>
Freight	Freight for both units	1.00	1.00	1.00	228.2200	\$228.2200	0	Installation	<input checked="" type="checkbox"/>

Total **\$2,728.22**

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

A new option has been added to Project Management 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.

**John Profit Job** Save  
Job #: 23-29

Form Type: Regular  
Invoice Date: 06/19/2023  
Period To: 06/19/2023  
Terms: Due on receipt

Bill To: Profit, John  
Sales Rep: Nate  
PO #: PO #  
Retainage %: 0.00

Bill To Address: 3031 Golfside Rd, Naples, 34110

Allow To Pay Bill Online: YES  
Bill Retainage: NO  
Apply Retainage to Def Class: NO  
Print Net this Invoice: YES

Source	Description	Total Value	% Complete	\$ Complete	\$ Retainage	\$ Net this Invoice	Taxable	Class
Phase	Deposit for Replacement of HVAC System	5000.00	100.00000	5000.00	0.00	0.00	NO	Installation
Phase	Remaining balance due upon completion	15512.00	80.00000	12409.60	0.00	3878.00	NO	Installation

Base Contract	Change Orders
Sell Price	\$20,512.00
Billed TD	\$13,531.60
Open (Diff)	\$6,980.40
% Billed	65.96%
Retainage	\$0.00

84.88 % Billed Complete (Including this invoice)	\$17,409.60
Less 0.00 % Retainage (This invoice)	\$0.00
Previously Invoiced	\$13,531.60
Subtotal	\$3,878.00
Tax	\$0.00
<b>Total due this invoice</b>	<b>\$3878.00</b>

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

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

**Invoice**  
Invoice Date: 06/19/2023  
Invoice No: J-432  
Due Date: 06/19/2023  
Sales Rep: Nate  
Job PO: 23-29  
Job No. 23-29  
G C Job No.

Bill To Address		Site Address	
John Profit 3031 Golfside Rd Naples, FL 34110		John Profit 3031 Golfside Rd Naples, FL 34110	

Description	Total Value	% Complete	\$ Complete	\$ Net this Invoice
Deposit for Replacement of HVAC System	5,000.00	100.00000	5,000.00	0.00
Remaining balance due upon completion	15,512.00	80.00000	12,409.60	3,878.00

Contract Amount	\$ 20,512.00
84.88 % Billed Complete (Including this invoice)	\$ 17,409.60
Previously Invoiced	\$ 13,531.60
Subtotal	\$ 3,878.00
Tax	\$ 0.00
<b>Total due this invoice</b>	<b>\$ 3,878.00</b>

LIMITED WARRANTY performed by the other warranties named company. All labor party makes no the above.

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 unnecessary questions about retainage from recipients of Job Invoices.



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

## Invoice

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

**Bill To Address**

**Jordan White**  
4562 Green Apple Dr  
Fort Myers, FL 33903

**Site Address**

**Jordan White**  
4562 Green Apple Dr  
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

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

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
<b>Total due this invoice</b>	<b>\$ 2,500.00</b>

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, expressed or implied, and the contractor is not authorized to make any warranties on behalf of the company.

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

Retainage column and totals will be displayed if invoice has retainage

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
<b>Total due this invoice</b>	<b>\$ 2,250.00</b>

## 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.

The screenshot shows the 'Edit Agreement - Hilton Garden Inn' interface. The form is divided into several sections: 'General', 'Billing Schedule', and 'Maintenance Schedule'. The 'General' section is active and contains the following fields and options:

- Agreement Number \***: SA-625
- Agreement Plan \***: Silver 1
- Active
- Items**: PMA Silver
- Problem Code \***: Insp 1
- Class**: Residential
- Reference Id**: Reference Id
- Tags**: (empty)
- Agreement Period**:
  - Recurring  Auto Renewal
  - Original Start Date \***: 11/07/2022
  - Contract Start Date \***: 11/07/2022
  - Expiration Date \***: 11/06/2023
- Renewal Price Type**:
  - Current Price  Contract Price
- Other Informations**:
  - Lead Source \***: Existing Customer
  - Customer PO #**: MA-22-6367
  - Clear PO# on Renewal
  - Taxable
- Tax Group \***: (empty)
- Change Bill To**: (empty)

A red box highlights the 'Clear PO# on Renewal' checkbox with the text: 'Place a check mark in this field if you want the PO# to be cleared upon S/A Renewal'. A red arrow points from this box to the checkbox. Another red arrow points from the 'Customer PO #' field to the 'Clear PO# on Renewal' checkbox.

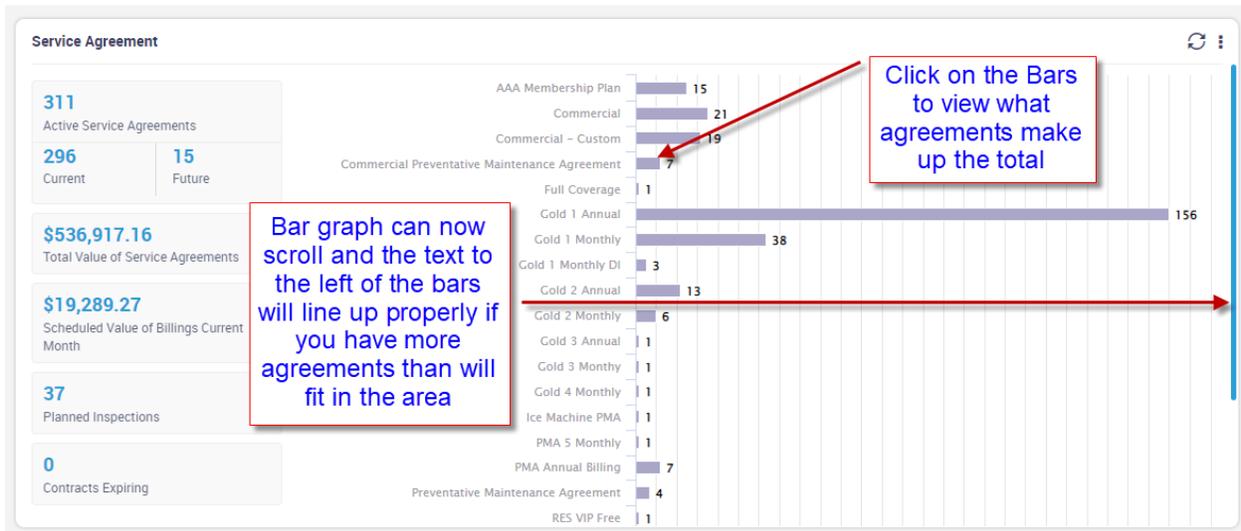
## Communication Template – The “Payment Link” insert code has been added to S/A Invoice and Office Invoice templates

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.

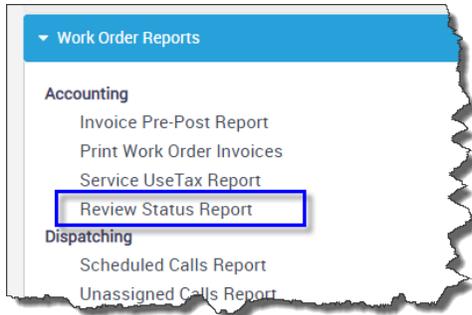


The screenshot shows a modal window titled 'Active Commercial Preventative Maintenance Agreement Agreements'. It contains a table with columns for Site Name, SA #, SA Type, Start Date, Expiration Date, Auto Renew, and Recurring. There are 'Print' and 'Export' buttons at the top right. Below the table, it shows 'Showing 1 - 7 of 7' and a pagination control with '1' selected. At the bottom, there is a 'Count:' field with the value '7'.

Site Name	SA #	SA Type	Start Date	Expiration Date	Auto Renew	Recurring
Adams, Melanie	<a href="#">SA-648</a>	CPMA	01/19/2023	01/18/2024	<input type="checkbox"/>	<input type="checkbox"/>
Adams, Melanie	<a href="#">SA-647</a>	CPMA	01/19/2023	01/18/2024	<input type="checkbox"/>	<input type="checkbox"/>
Custer Park Apts Bldg A	<a href="#">SA-609</a>	CPMA	08/18/2022	08/17/2023	<input type="checkbox"/>	<input type="checkbox"/>
Dean, Gary	<a href="#">SA-618</a>	CPMA	08/31/2022	08/30/2023	<input type="checkbox"/>	<input type="checkbox"/>
Harris Mechanical	<a href="#">SA-659</a>	CPMA	02/22/2023	02/21/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Harris Mechanical	<a href="#">SA-658</a>	CPMA	02/22/2023	02/21/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Power Sports	<a href="#">SA-680</a>	CPMA	05/19/2023	05/18/2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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.



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### Invoice Review Status Report

Invoice #	Invoice Date	Customer Name	Review Status	Resolution Status	Business Entity	Invoice Amt	Tax	Total
<a href="#">A-6549</a>	06/21/2023	Walgreens	Hold	Maintenance		1,250.00	103.13	1,353.13
<a href="#">A-5683</a>	06/05/2023	Moss, Lisa - Main	Needs Review	Maintenance		632.15	40.31	672.46
<a href="#">F-6721</a>	06/16/2023	Wells, Christy	Reviewed	Work Completed	Res HVAC Service	340.64	0.00	340.64
<a href="#">F-6702</a>	06/12/2023	Rivers, Lisa	Needs Review	Bill from Office	Res HVAC Service	160.00	10.40	170.40
<a href="#">F-6727</a>	06/16/2023	Wilson, Jennifer	Needs Review	Work Completed	Com Plumbing Service	1,178.76	25.84	1,204.60
<a href="#">J-434</a>	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.

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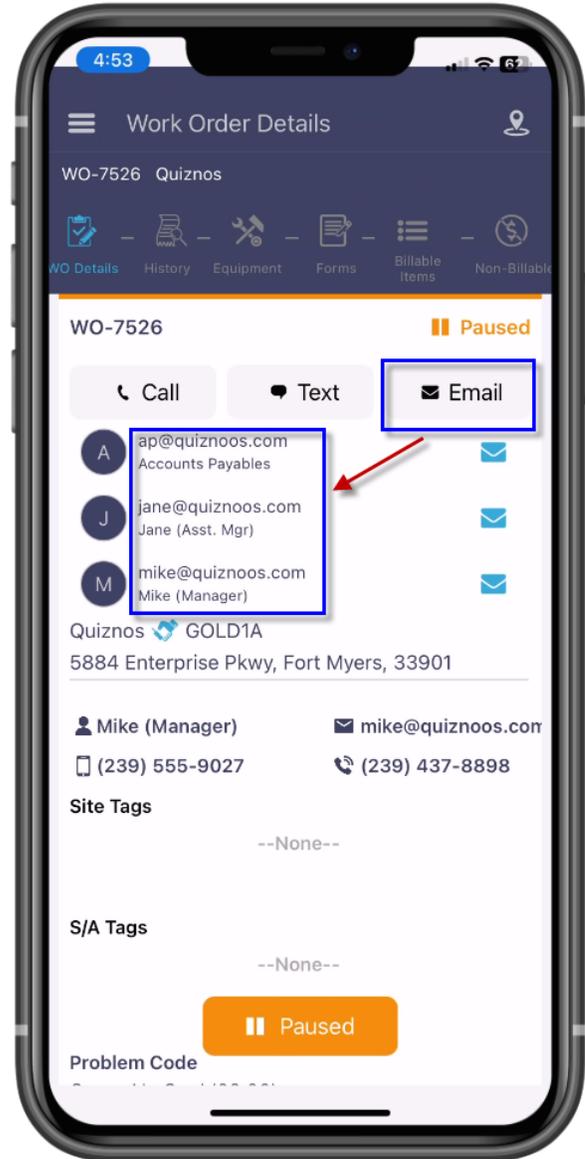
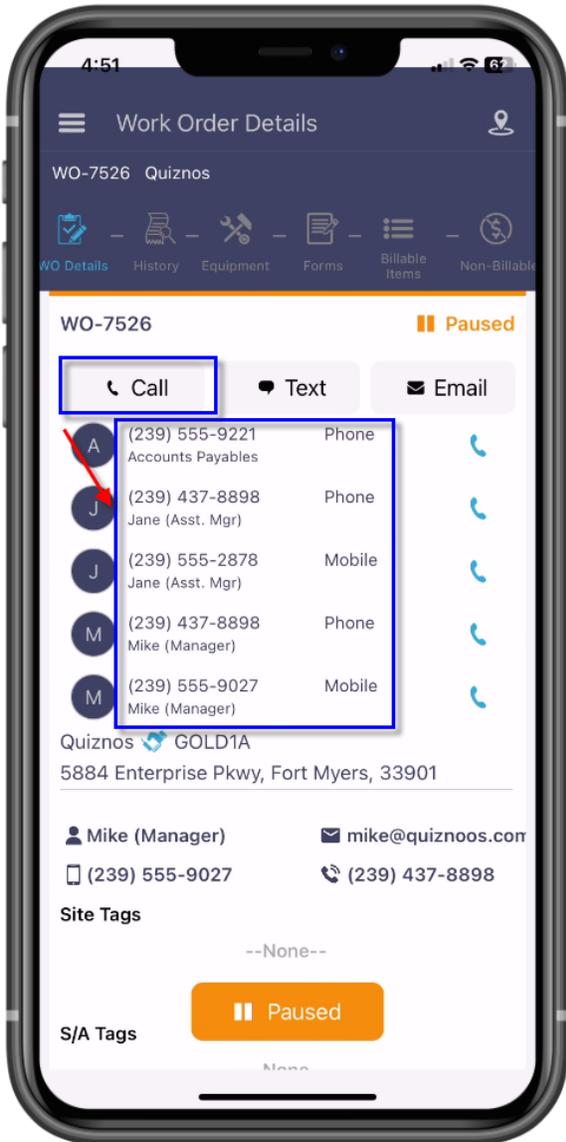
### COD Payment Report

**Drew**

Work Order #	Invoice #	Invoice Date	Invoice Amount	Cash	Check	Credit Card	Total Paid
WO-7676	<a href="#">F-6691</a>	06/07/2023	8,589.28	0.00	8,589.28	0.00	8,589.28
Site Address 119925 Atwater Dr Port Charlotte, Florida 33983			Bill To Name Wells, Christy				
	Payment Date	Payment Type	Reference #	Note	Cash	Check	Credit Card
	6/19/2023	Check QB	6455	Check came from K & T Property Management	0.00	8,589.28	0.00
				0.00	8,589.28	0.00	8,589.28

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

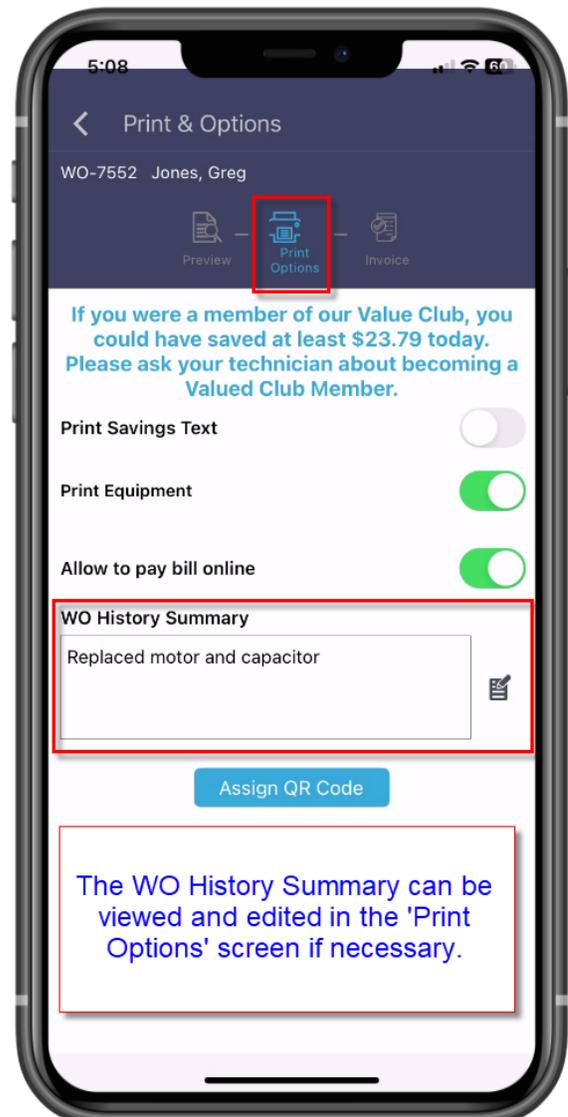
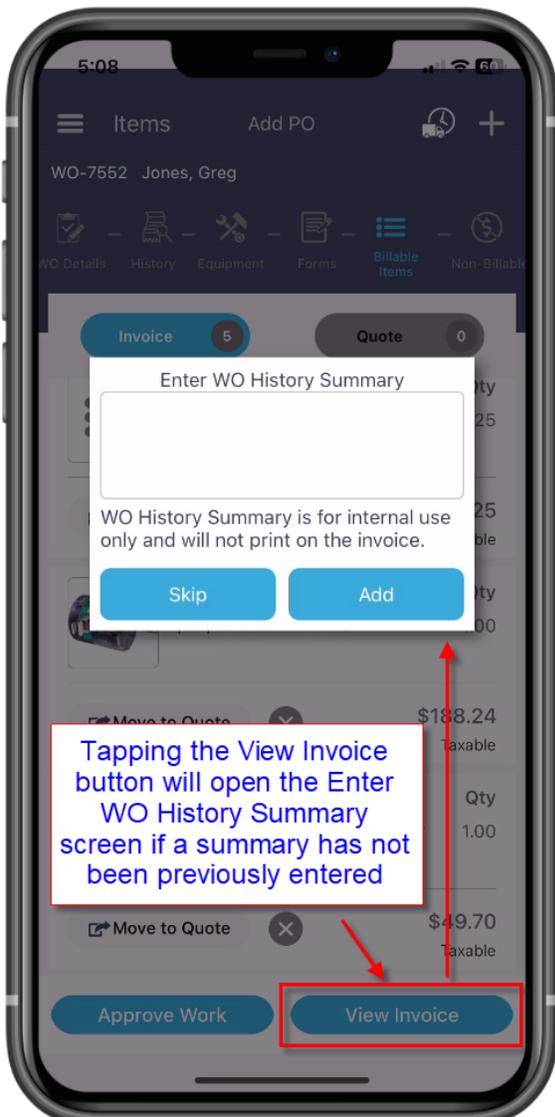
When you tap the 'Call', 'Text' or 'Email' buttons on the Work Order Details screen, the contact name associated with the phone numbers and email addresses will be displayed below the appropriate phone number, SMS (text) number or email address. This will make it easier to know what phone number to use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



## ServiceFactor Mobile – Work Order History Summary

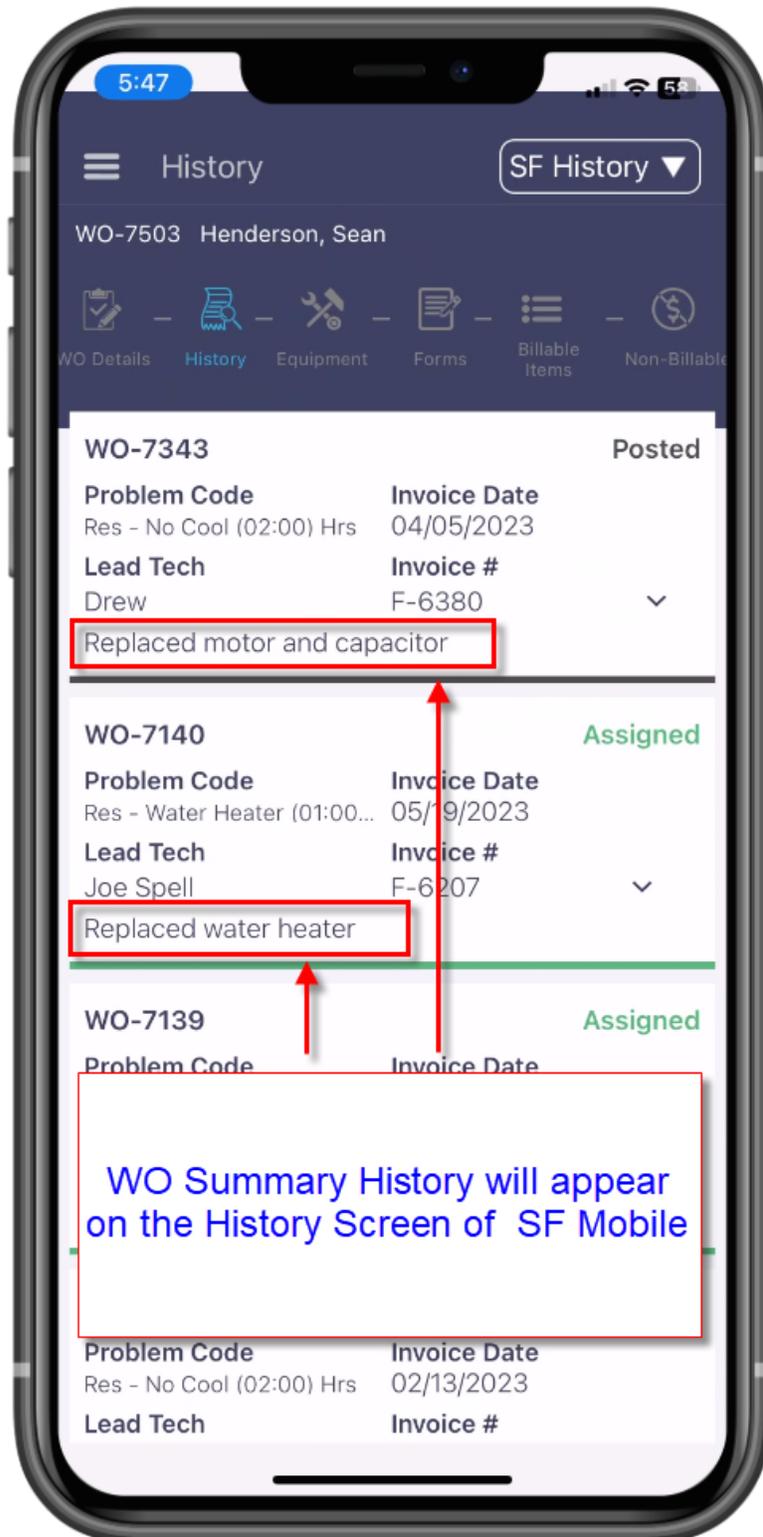
A new Work Order History Summary field has been added to SF Mobile that will allow the technician to enter a brief description of the work that was performed. The WO History Summary field will automatically popup when the technician is finished entering items on the Work Order and taps the “View Invoice” 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.



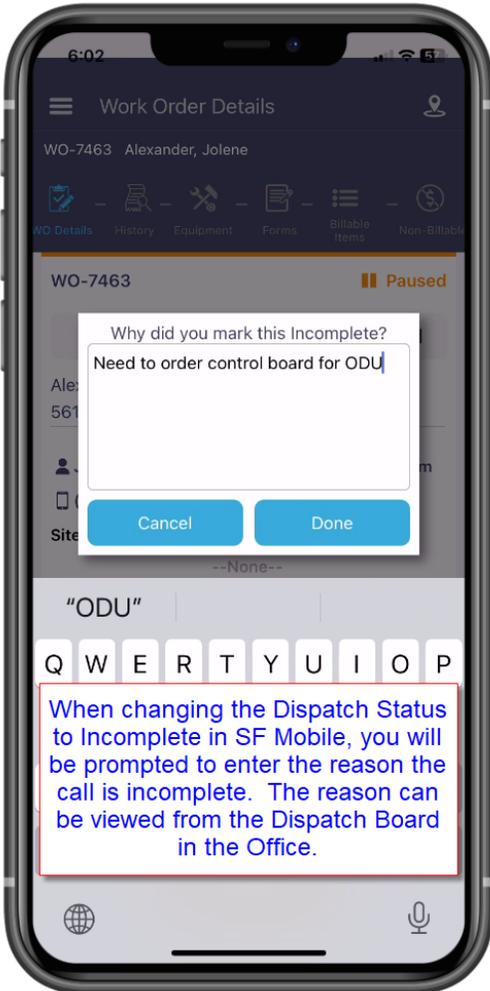
## SFServiceFactor Mobile – WO History Summary from prior Work Orders can be viewed in the History Screen

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.

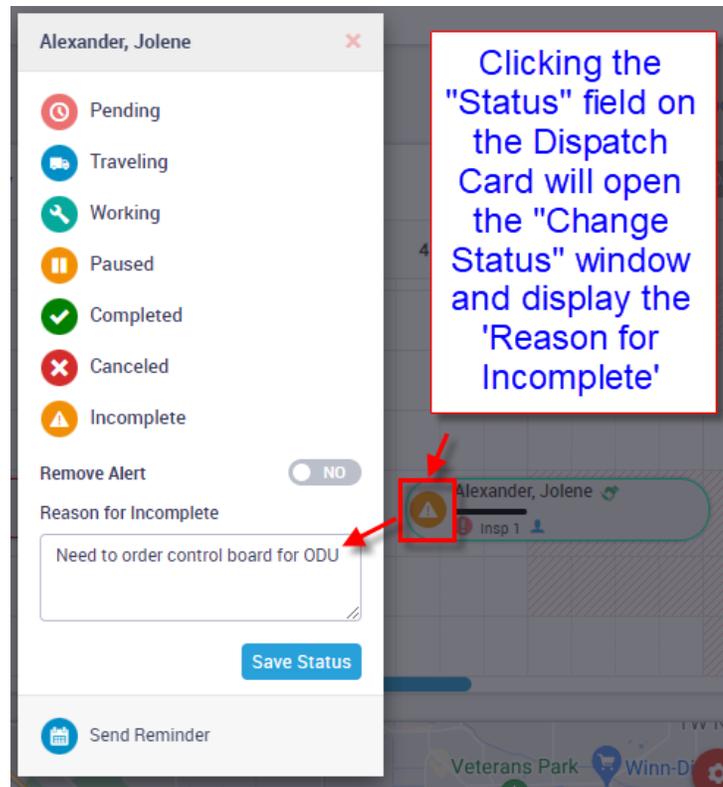


## ServiceFactor Mobile – You can now enter a reason that a call has been marked incomplete

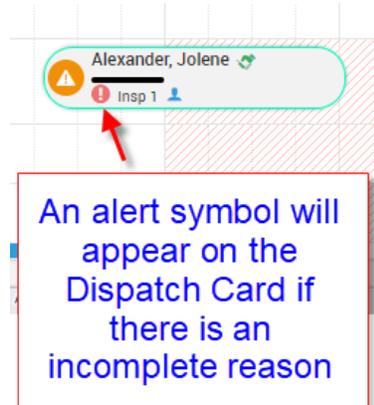
When you change the dispatch status to Incomplete in SF Mobile, you will be prompted to enter the reason that you marked the call Incomplete. This will enter an alert on the dispatch card and can be viewed in the office as to why the call was marked incomplete.



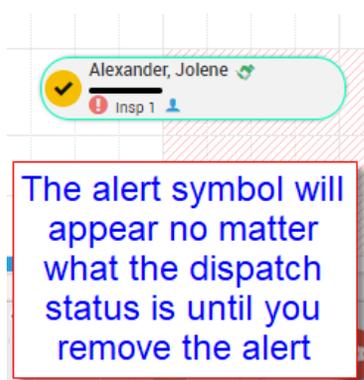
When changing the Dispatch Status to Incomplete in SF Mobile, you will be prompted to enter the reason the call is incomplete. The reason can be viewed from the Dispatch Board in the Office.



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