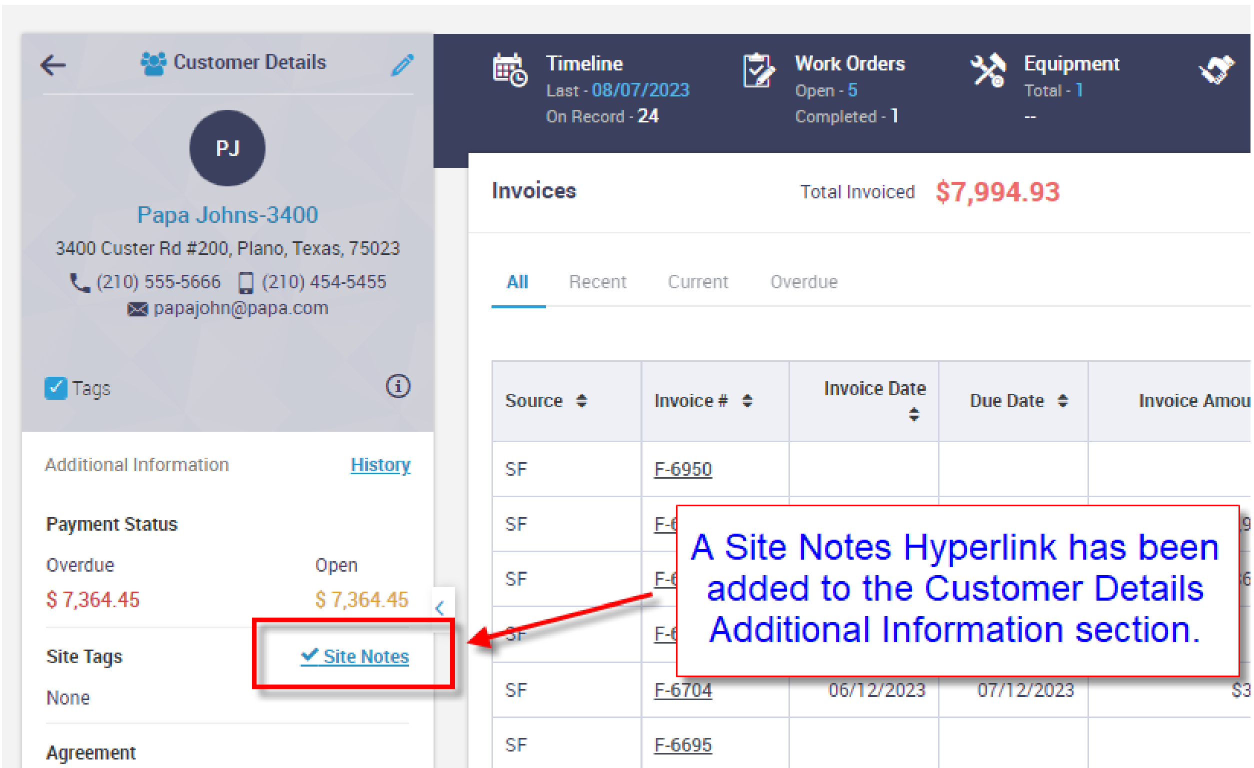
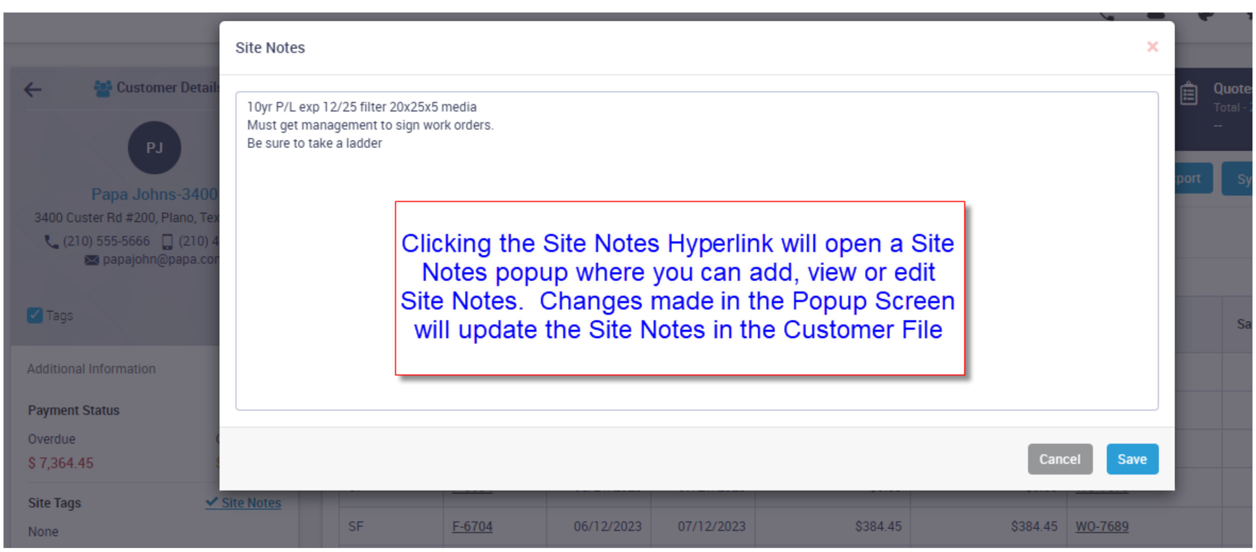
SF Release Notes: August 09, 2023

Site Notes Hyperlink added to the Customer Details Center

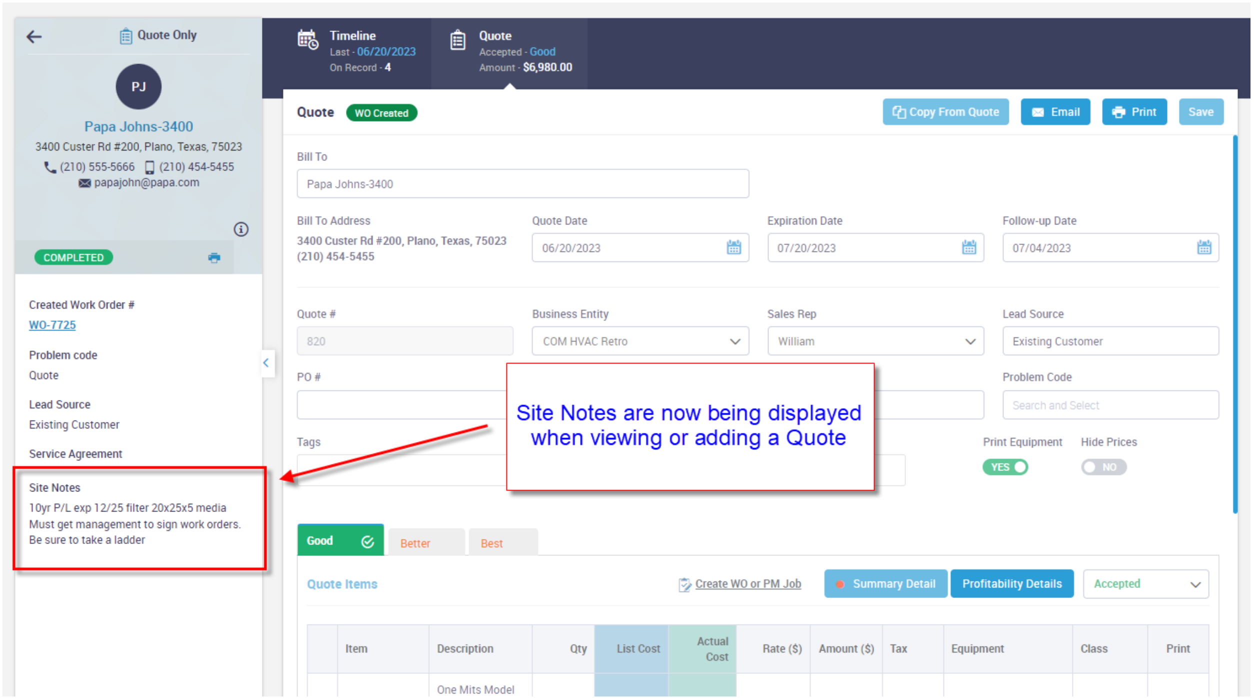
You can now access the Site Notes from the Customer Detail Center without having to drill into the Customer Record to view them. A hyperlink has been added to the “Site Tags” section that will allow you to view, edit or add site notes directly from the Popup. If there are any site notes associated with the customer, there will be a check mark next to the hyperlink.





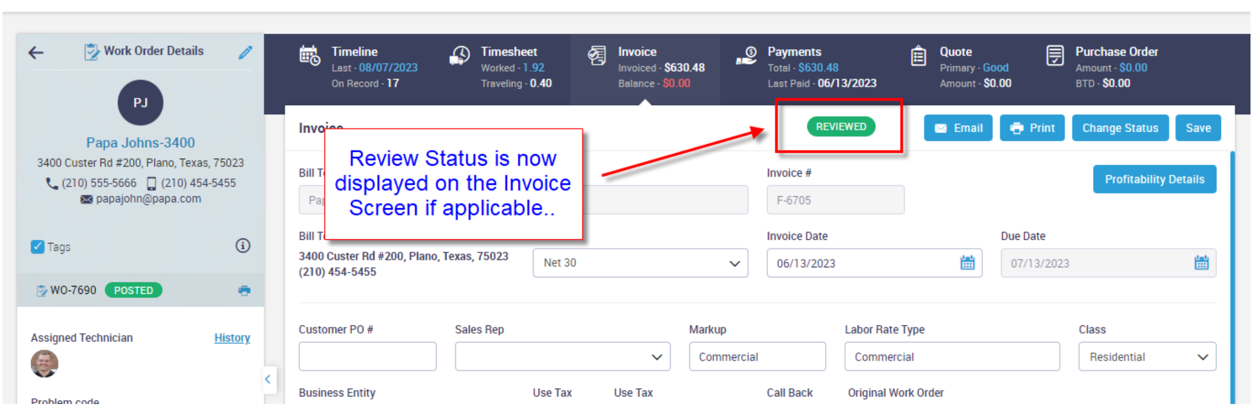
Site Notes will now be displayed in the Quotes Module

The Site Notes associated with a customer will now be displayed on the left hand side of the Quotes Screen.



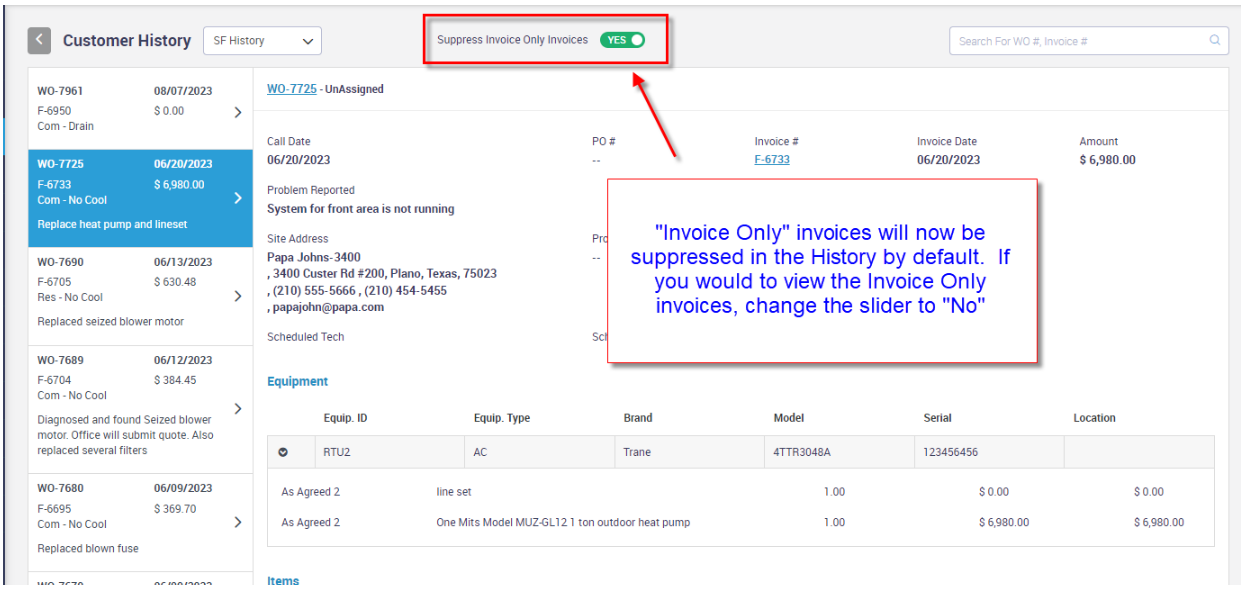
Review Status has been added to the Invoice Screen

You can now view the "Review Status" on the Invoice Screen. Prior to this release you had to drill into the Change Status option to view the Review Status. **NOTE –** If the status is "N/A – Not Applicable", it will not be displayed on the screen. The Review Status was introduced in the last update and is typically used by commercial companies that require management to review invoices prior to being sent. The different status options are "Needs Review", "Hold" and "Reviewed".



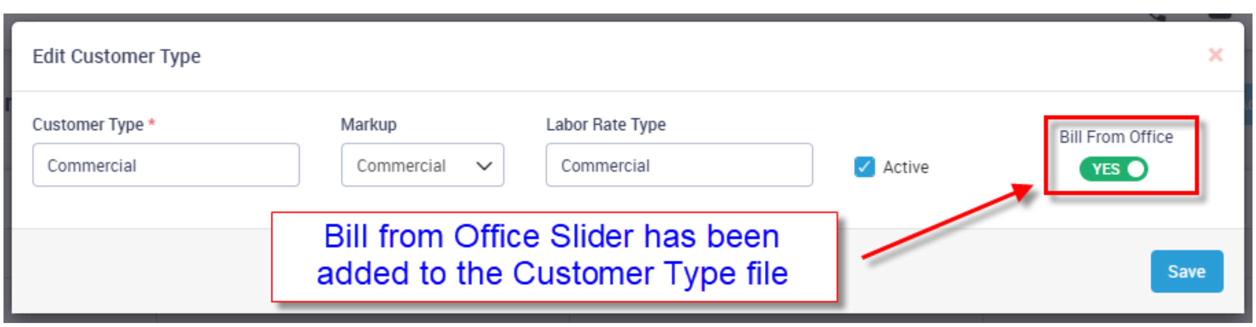
A Slider has been added to the History Screen that will Suppress “Invoice Only” Invoices by default

A new slider has been added to the history screen that will suppress the Invoice Only invoices. This will make it quick and easy to see history where actual work was done as opposed to also having to view billing invoices, such as service agreement billings, project management billings, over the counter sales, etc. If you want to view all history, simply change the slider at the top of the invoice screen to “No”.



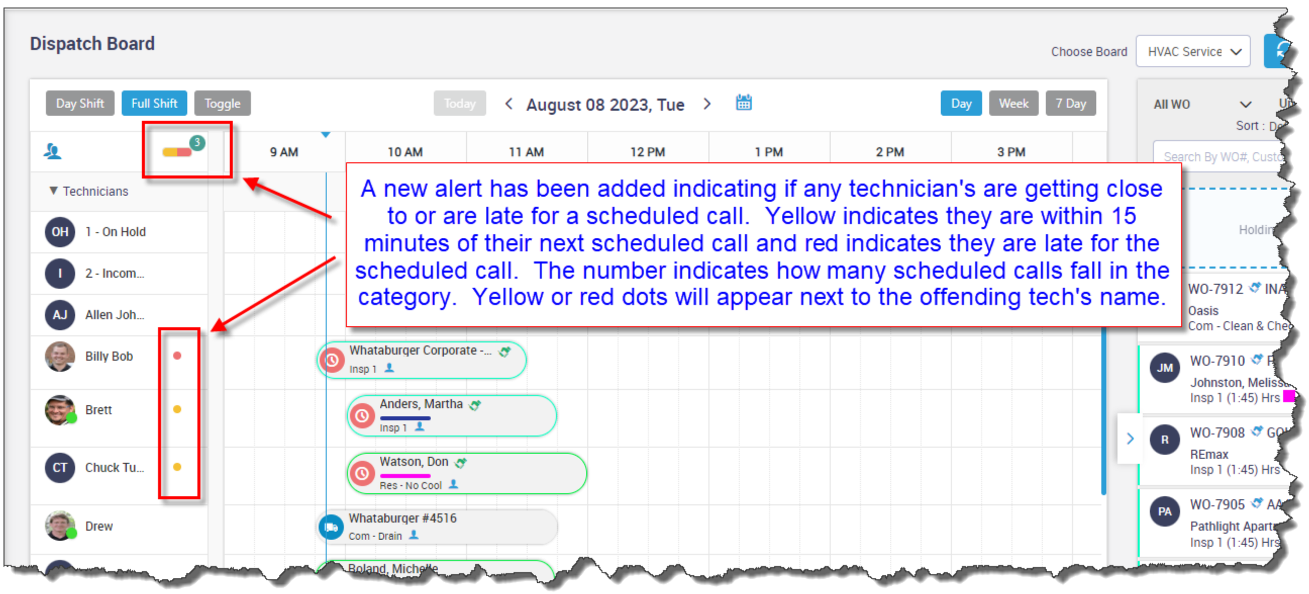
Bill from Office slider has been added to the Customer Type file

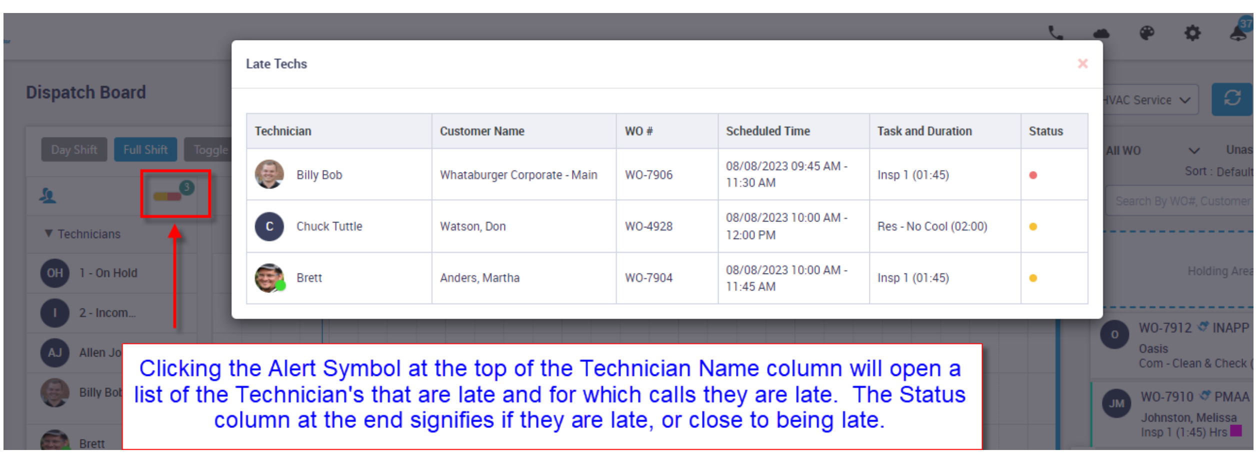
The “Bill from Office” slider has been added to the Customer Type file that will automatically set the flag when adding new customers. For example, you might want all Commercial Customers to be billed from the office, but collect COD from Residential Customers. In this case, you can set the Bill from Office slider to Yes in the Customer Type file for ‘Commercial’ Customers and any time a new ‘Commercial’ Customer is added, the flag will automatically be set to ‘Yes’. **NOTE –** you can override the default setting on any customer at any time. You access the Customer Type file from the Settings Menu.



An Alert has been added to the Dispatch Board indicating if you have any technicians late or getting close to being late for a call

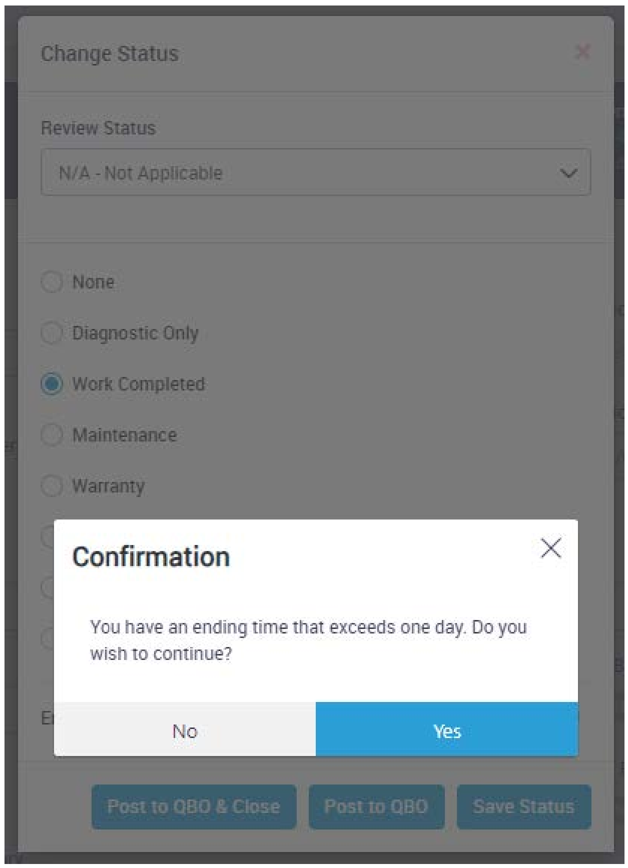
A new alert has been added to the top of the technician's column on the Dispatch Board that will alert you if a technician is within 15 minutes of a scheduled call, or has surpassed the scheduled time for a call without being dispatched. If the technician is within 15 minutes of a scheduled call, the indicator will be yellow and if the technician is late for a scheduled call, the indicator will be red. If you have a technician that is within 15 minutes of a scheduled call and another technician that is late for a scheduled call, the indicator will be yellow and red. The system will also display a yellow or Red dot next to the offending technician's name. A number will be displayed Next to the indicator at the top of the technician's column letting you know how many calls fall into the close to being late and late status. Clicking on the colored indicator will list which technicians are late and the work orders for which they are late.

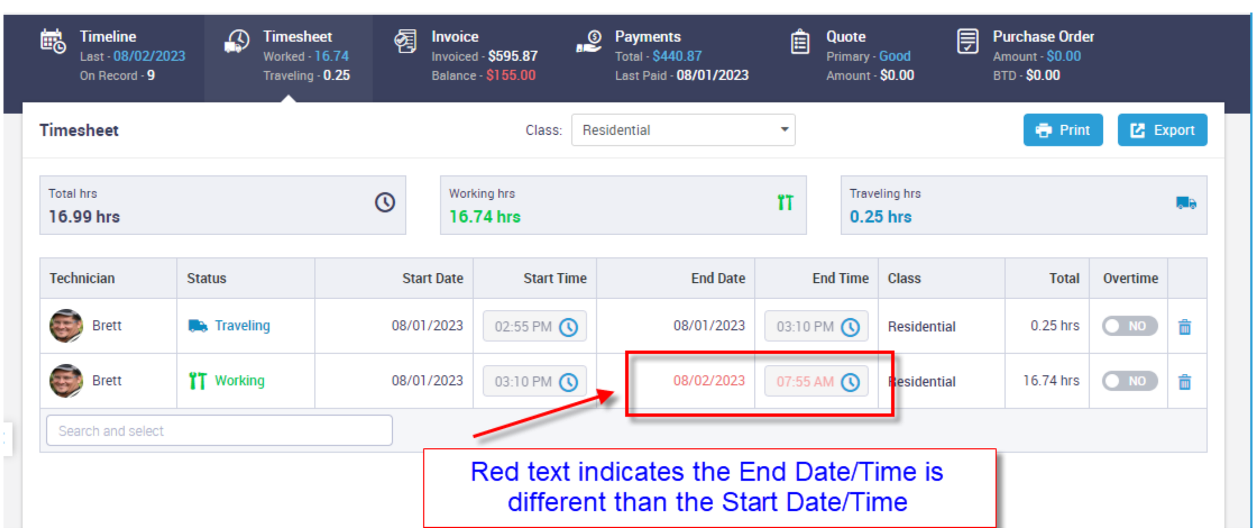




You will now be prompted if you try to post an Invoice that has a Travel or Working time where the Start Date and End Date are not the same

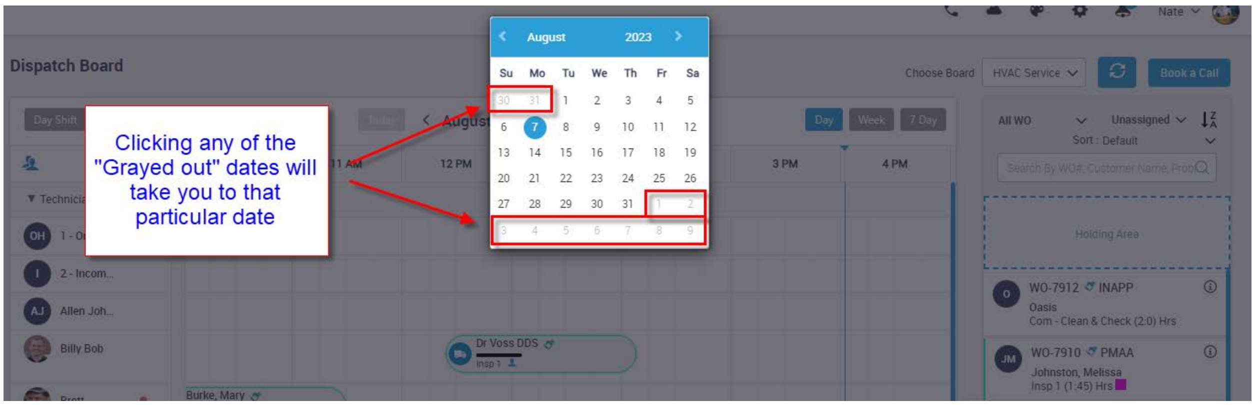
If you try to post an invoice that has a Travel or Working time with an End Date that is different than the Start Date, you will be warned that the end time exceeds one day and will be prompted if you wish to continue posting. This should help catch if a technician didn't change the status of their last call of the prior day before dispatching themselves to the new day, and allow you to correct it prior to posting the invoice. **NOTE –** If you go to the "Timesheet" tab, you will notice that the item that exceeds a day will display the End Date and End Time in red, making it quick to determine which record may need to be corrected.

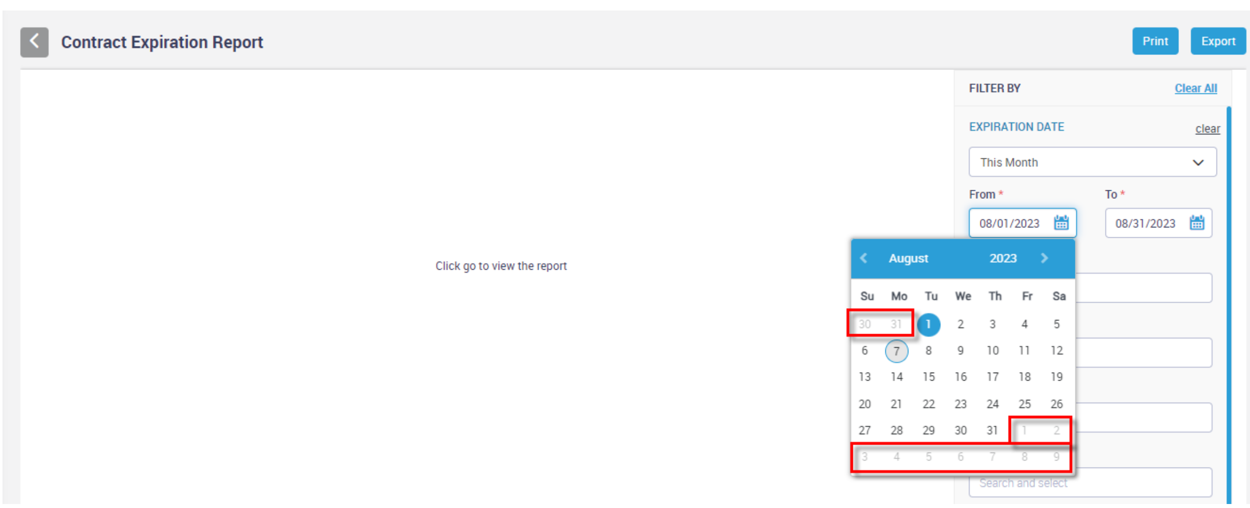


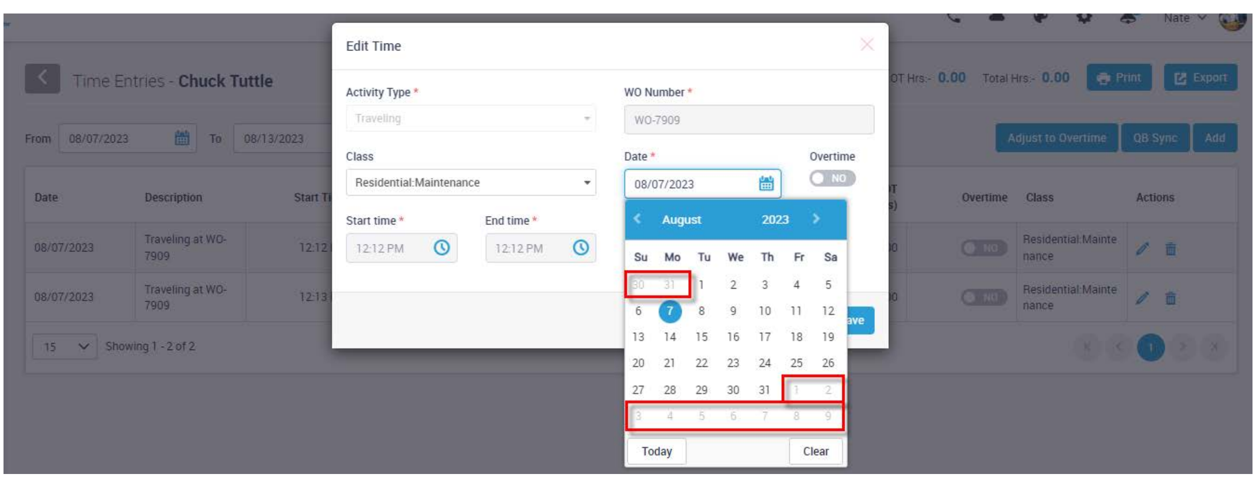


Popup Calendars will now allow you to click on a date in the prior or future month

When the system opens a calendar, it will show you the last few dates of the prior month and the first few dates of the next month on the first and last lines respectively. You can now click on one of the dates in the prior or future month and the record will change to that particular date. This is universal throughout the program, whether on the dispatch board, reports, date fields, etc. Prior to this change, you would have had to click the left or right arrow and change the month in order to click on one of the dates.

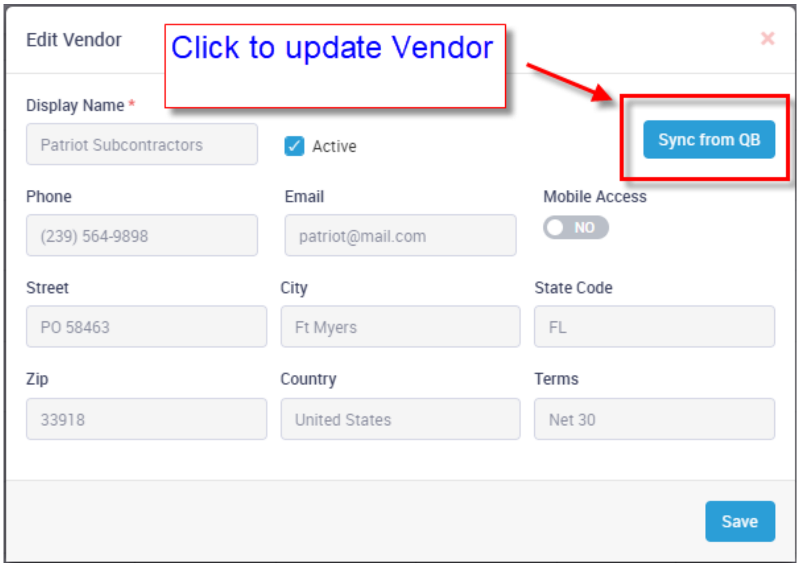






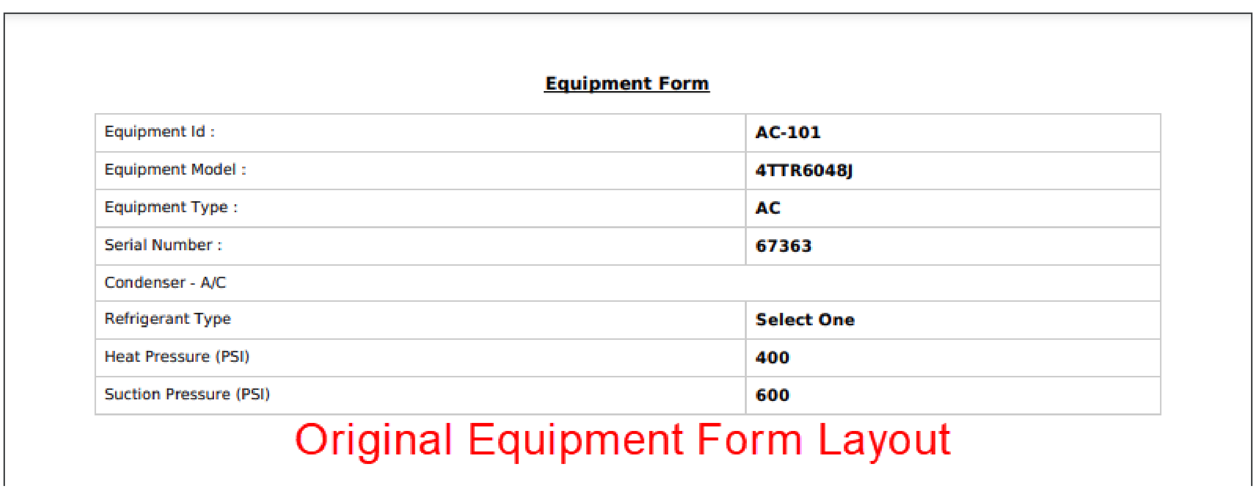
Sync from QB Button added to the Vendor Record in ServiceFactor

A new Sync from QB Button has been added to the Vendor record that will automatically update the vendor record in ServiceFactor with any changes made to the Vendor Record in QuickBooks. This will allow you to sync the data yourself if it changes in QuickBooks without having to get assistance from Support.



Forms have been revamped for a more professional look

The forms have been revamped from their original look to a more professional look. The Equipment Form now includes your company name and logo, the Work Site Name and Address, Date and Work Order Number and a better layout. The headings of different sections on the forms are now Bold and the options are standard print. The Work Order Form layout also includes your company name and logo, the Work Site Name and Address, Date and Work Order Number and a better layout. The original problem reported is at the top of the answers in bold and the different section headings are in Bold.



Equipment Form

Equipment Id :	**AC-101**
Equipment Model :	**4TTR6048J**
Equipment Type :	**AC**
Serial Number :	**67363**
Condenser - A/C	
Refrigerant Type	**Select One**
Heat Pressure (PSI)	**400**
Suction Pressure (PSI)	**600**

Original Equipment Form Layout

Equipment Form

New Equipment Form Layout

AA Service

Work Site

Robert Reed
6360 Cocos Drive,
Fort Myers, Florida, FL 33908

Date	**08/07/2023**
Work Order Number	**WO-7962**
Equipment Id	**AC-101**
Equipment Model	**4TTR6048J**
Equipment Type	**AC**
Serial Number	**67363**

Condenser - A/C	
Refrigerant Type	**R410a**
Head Pressure (PSI)	**400**
Suction Pressure (PSI)	**71**
Volts(Amps)	**240/30**
Electrical Connections	**Good**
Fan and Motor	
Volts	**208**
Amps	**20**
Electrical Connections	**Good**

Customer

Customer Signature

Tech

Technician Signature

Work Order Form

New Work Order Form Layout

AA Service

Work Site

Robert Reed
6360 Cocos Drive,
Fort Myers, Florida, FL 33908

Date	**08/07/2023**
Work Order Number	**WO-7962**
Problem Code	**Insp 1**

Seasonal Inspection on 1 System Perform 15 point precision tune up. 1. Flush Drain Line 2. Tighten and Safety Test all wiring connections 3. Inspect start and run capacitors

Technician Name	**Nate**
Date	**08/07/2023**
Equipment Location	**1st Floor**
Heat or Cool Mode	**Cool**
AIR HANDLER CHECKLIST	
Wiped down exterior cabinet with rag?	**Yes**
Delta T	**23**

Reports – A new Inventory PO Items to Be Billed Report has been added

A new report has been added that will list Inventory items that have been received on a PO, but have not yet had a Vendor Bill entered for the items in ServiceFactor. The report will show the quantity ordered, quantity received and the quantity that has been billed. Once the items have been fully billed, they will no longer appear on the report. The report can be filtered by a Vendor or a particular Inventory Item and can be sorted by the Item Name/Number, Vendor or PO Number.

Monday, August 7, 2023 — Inventory PO Items to be Billed — 1/19

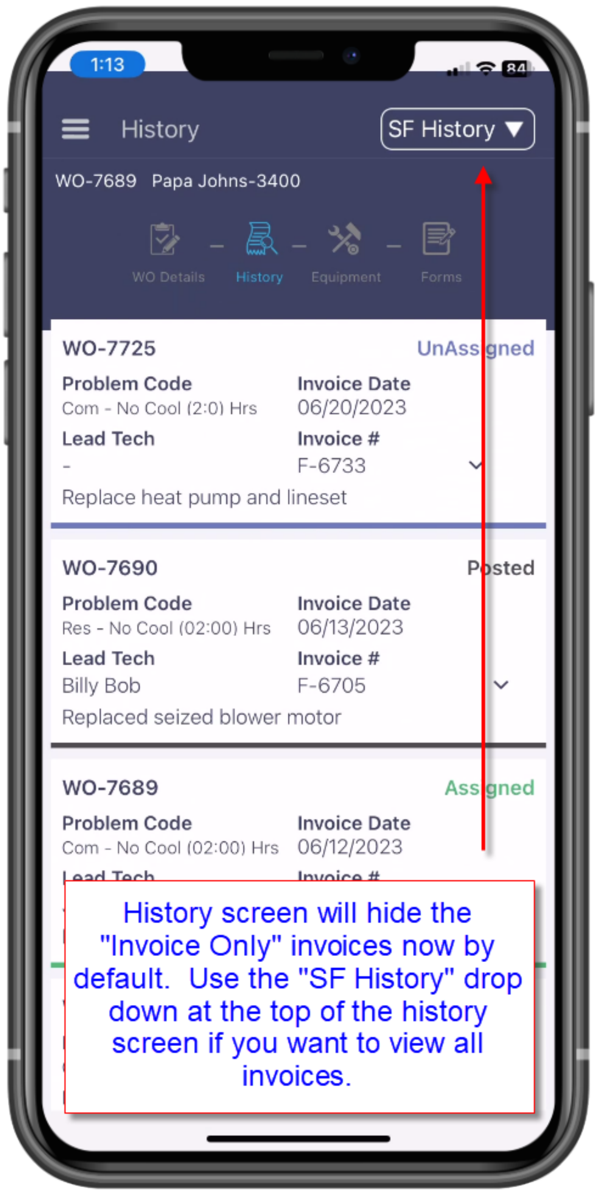
Item Name/Number	Item Description	PO Number	Vendor	Ordered	Received	Billed Qty
20x20x1 Pleated Filter	20X20 Pleated Filter	PO-1001	Grainger	2.0000	2.00	0
ACC005	Schrader Valve Core	PO-1006	Carrier	1.0000	1.00	0
24V Relay	X34-34-24VR	PO-1011	Davis Crane	1.0000	1.00	0
ACC005	Schrader Valve Core	PO-1013	Carrier	1.0000	1.00	0
ACC003	3/8" Saddle Valve	PO-1014	Davis Crane	1.0000	1.00	0
CAP004	10 Mfd 370V Premium Capacitor	PO-1020	Patriot Subcontractors	1.0000	1.00	0
MOT005	3/4 hp 1075 RPM Cond Mtr	PO-1021	Grainger	1.0000	1.00	0
24V Relay	X34-34-24VR	PO-1024	Carrier	1.0000	1.00	0
75V Transformer		PO-1025	Carrier	1.0000	1.00	0
24V Relay	X34-34-24VR	PO-1030	Carrier	1.0000	1.00	0
75V Transformer		PO-1031	Davis Crane	2.0000	2.00	0
ZON001	Honeywell TZ-4 Zone Control	PO-1035	Standard Supply	1.0000	1.00	0
CAP004	10 Mfd 370V Premium Capacitor	PO-1036	Johnstone Supply	1.0000	1.00	0

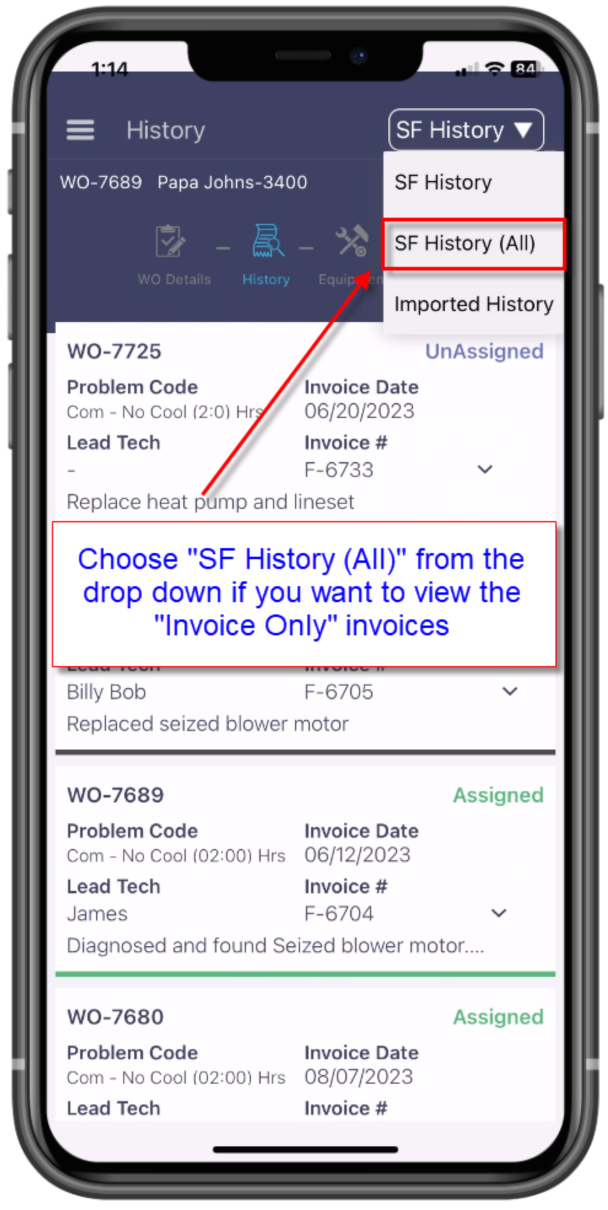
Reports – Print Work Order Invoice Report now has the option to select an Invoice Date Range

You can now choose a Date Range when running the "Print Work Order Invoice" report. Prior to this release, the options were to filter by Work Order #, Invoice Number or Print an Invoice # Range. With the new option, you can print all the invoices for a selected date range based on the Invoice Status.

SF Mobile – "Invoice Only" Invoices will now be suppressed by default in the History Screen

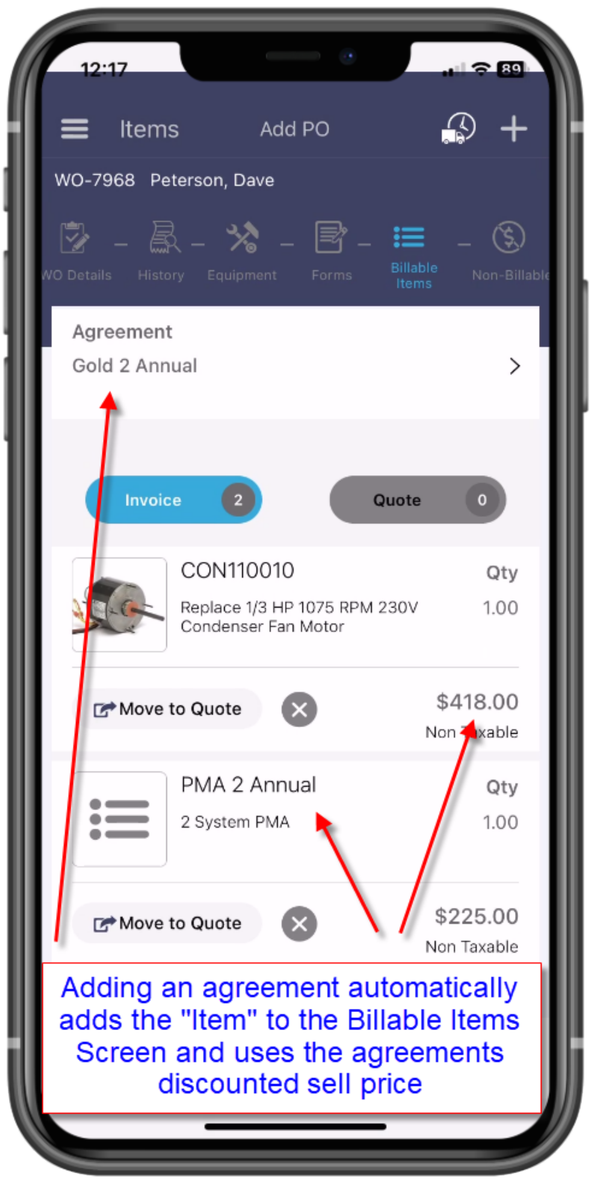
The "Invoice Only" invoices are now suppressed by default in the SF Mobile History Screen. This will make it quick and easy to see history where actual work was done as opposed to also having to view billing invoices, such as service agreement billings, project management billings, over the counter sales, etc. This will be especially helpful if you do monthly billilngs for for Service Agreements via the Auto Credit Card feature. If you want to view all history, simply tap the "SF History" drop down and change the option to "SF History (All)".

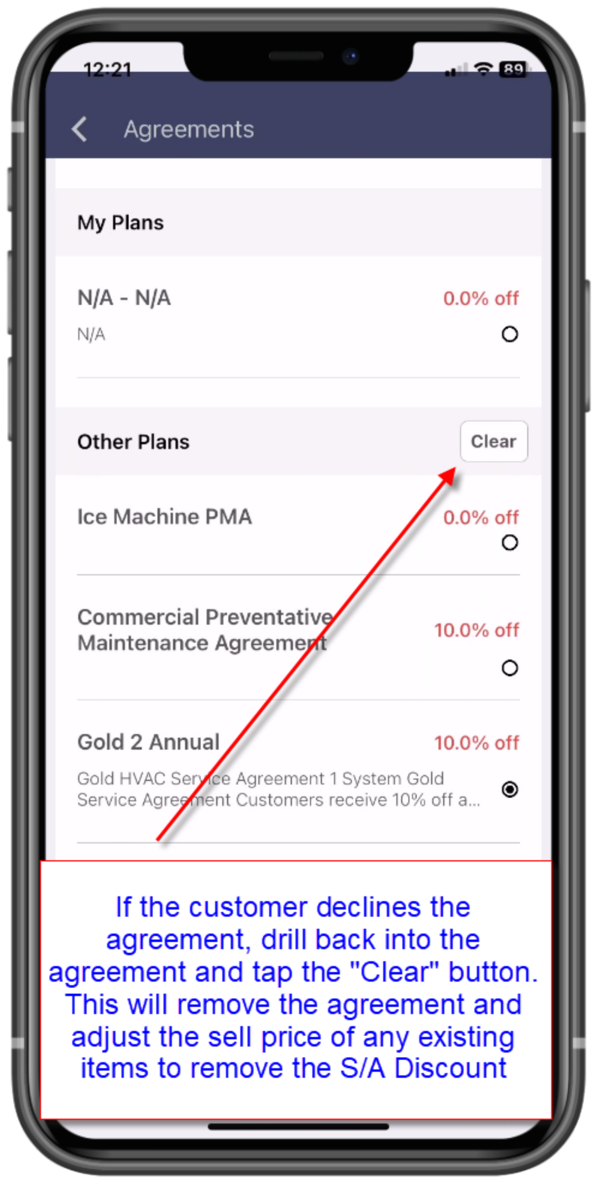


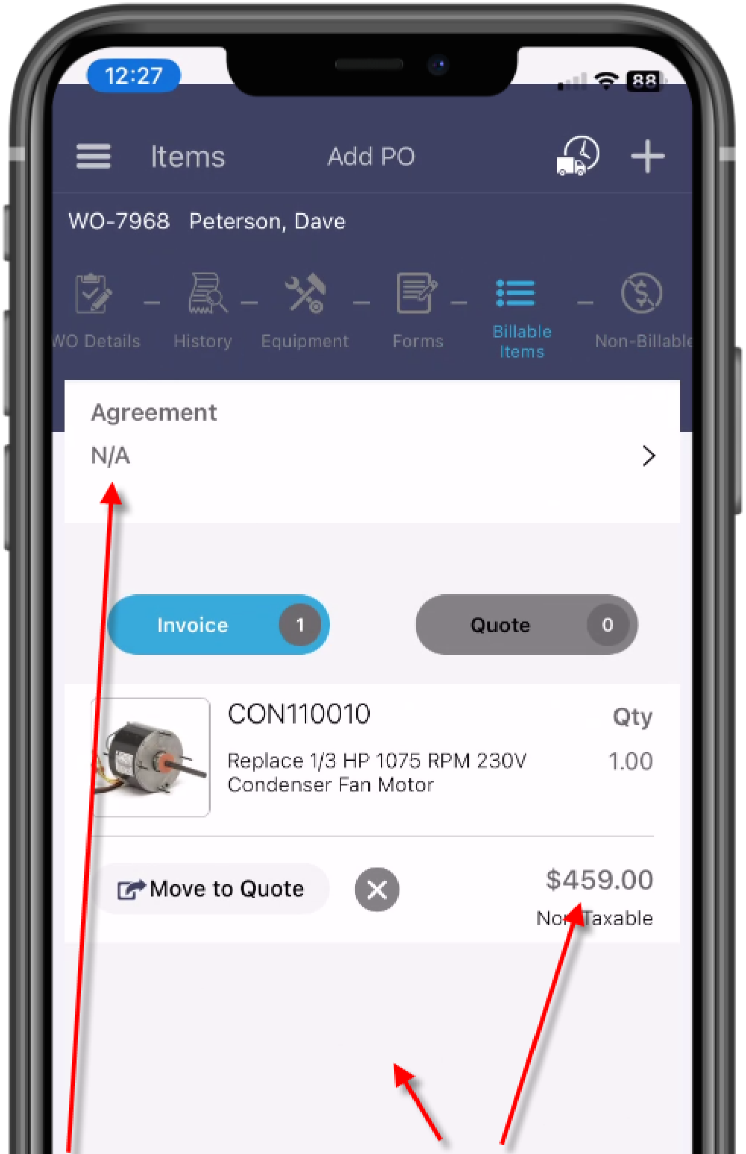


ServiceFactor Mobile – Offering a Service Agreement in the field has been enhanced

If you try to sell the customer a service agreement in the field and they decline it, the system will now automatically delete the Service Agreement item from the Billable Items screen if you "Remove" the agreement. If you change the agreement you are offering from one type to another, the item will not be removed, but can be manually deleted. Also, the agreement being offered will not be automatically added in the office until the dispatch status is changed from Working to a different status. This will make it easier to offer the customer a Service Agreement when finishing out the invoice, and if they decline, not have to delete the Agreement in the office. Removing the proposed agreement in SF Mobile will automatically adjust the sell prices to remove any discounts given if they were to purchase the agreement.



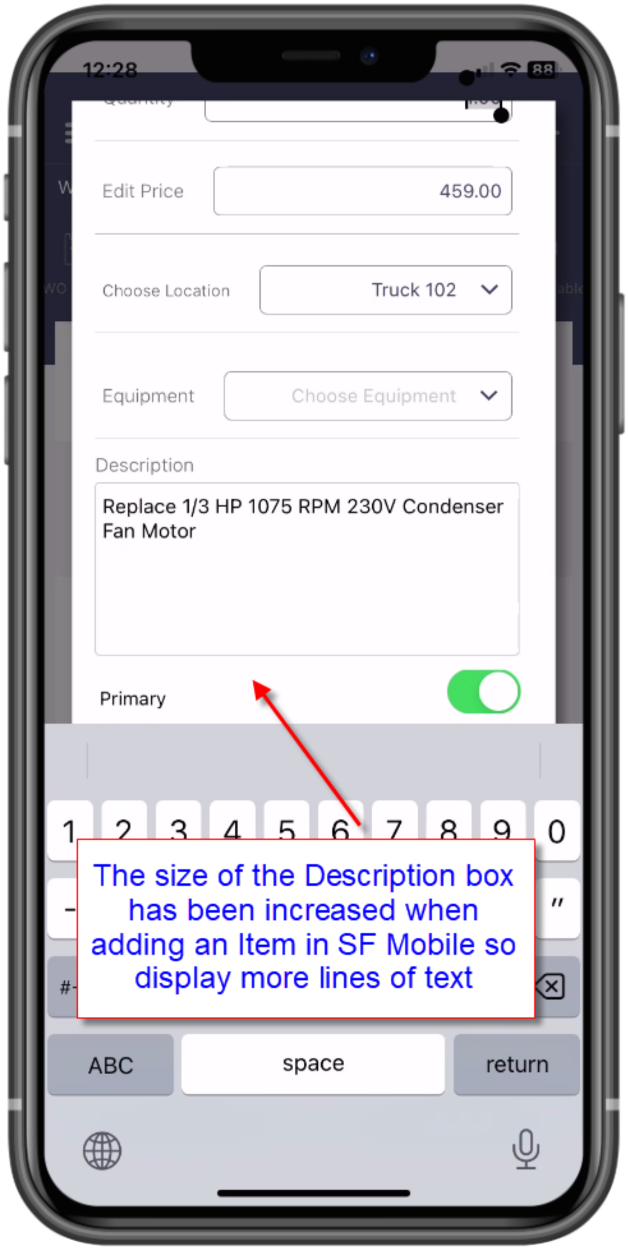




Clearing the agreement will adjust the sell price to remove the S/A discount and delete the S/A Item from the Billable Items Screen.

SF Mobile – The Item Description text box size has been increased

The size of the description box when adding items has been increased making it easier to enter additional notes and details about the item.



SF Mobile – The Sync Data Menu Option now does a full system sync

The "Sync Data" menu option will now do a full system sync, as opposed to just a partial sync. Prior to this release, the system would only do a partial sync when you tapped the Sync Data button, and would require you to log out and back into SF Mobile in order to do a full sync. A full sync includes static files, such as the item list. Now if the office changes the sell price of items, or adds new items, you can simply use the Sync Data button to download the changes and new items as opposed to having to log out and log back in.

NOTE – Pulling down on the Work Order Listing screen will still do a partial sync and download any new work orders or remove any work orders that meet the requirements to remove them from the device.