

SF Release Notes: September 14, 2023

Dispatch Board – Weekly Schedule - Dropping a call from the Unassigned column on the Weekly Scheduled will now use the default “Company Start Time” for the scheduled time

If you are on the Weekly View or 7-Day View of the Dispatch Board and you drag and drop a call from the unassigned column, the system will now default the Scheduled Time to the default company “Start Time” from the Master Settings. For example, if your default company start time is 7:30 AM, the system will use that as the default scheduled time when dropping the call on a future date in the Weekly or 7-Day Schedule. Prior to this release, the system would default the scheduled time to the current time that the call was moved from the Unassigned column to the weekly schedule. **NOTE** – Click the “Start Time” to change the Scheduled Start time.

NOTE – If you move a call from the Unassigned Column to the current date on the Weekly or 7-Day schedule board, the system will use the next closest quarter hour for the scheduled time if it is after the default Company Start Time. For example, if it is 3:23 PM and you move a call from the Unassigned Column to the current date, the system will use “3:30 PM” as the “Start Time” (Scheduled Time). Again, clicking on the “Start Time” field will allow you to change the scheduled start time.

Assignments Details

Technician	Date
Allen Johnson	09-14-2023
Problem Code & Duration	
Insp 1 (1.45) Hrs	
Start Time	
08:00 AM	

Cancel Assign

When moving a call from the Unassigned Column to a future date in the Weekly or 7-Day schedule, the system will now use the default company Start Time as the "Scheduled" start time. You can click on the "Start Time" to edit if you want to change the scheduled time.

Dispatch Board – Weekly Schedule – When moving a call from one date to another on the Weekly or 7-Day Schedule, you will now be prompted with the time you want to schedule the call for the new date.

If you are on the Weekly or 7-Day Schedule and you move a scheduled call from one date to another, the system will now default the Scheduled Time on the new date to the default company “Start Time” from the Master Settings. Prior to this release, the system would use the scheduled time from the prior day for the scheduled time for the new day. This will make it easier to find the calls that you rescheduled on the daily dispatch board since they will all start at the beginning of the day. **NOTE** – You can click on the “Start Time” field to change the scheduled start time when rescheduling the call in the Weekly or 7-Day schedule.

NOTE – If you want the system to use the prior scheduled time instead of the “Company Start Time” when moving a call to a different date on the Weekly or 7-Day schedule, click the “Toggle Button” at the top of the Dispatch Board and turn the “Edit Time on Re-Assign (week view)” slider to “No”. This will cause the system to work as it did prior to the update. If you change the Slider in the Toggle popup, it will remain with that setting until you log out of SF or until you manually change it back.

When re-assigning a call from one date to another on the Weekly or 7-Day schedule, the system will now use the Default Company Start Time for the new Scheduled Time. Clicking on the "Start Time" field will allow you to edit the "Scheduled Time" of the call.

Click the "Start Time" field to edit the scheduled time

YES

Lead Source – You can now assign a default Lead Source to a Customer Type

One of the powerful features of ServiceFactor is the ability to track where your work is coming from via a Lead Source. Whenever you add a new Work Order, Job, Quote or Service Agreement the system prompts you for a Lead Type in order to track the lead source from where the revenue was generated. If you do not want to manually fill in a Lead Source for specific customer types, such as “Commercial” customers, you can assign a Lead Source to the Customer Type and each time you create a Work Order, Quote, Job or Service Agreement for a customer assigned the particular customer type, the system will automatically fill in the Lead Source that has been assigned to the Customer Type. **NOTE** – If your company is tracking the lead sources from where your revenue is generated, it is not recommended that you use this feature.

Edit Customer Type

Customer Type *
Commercial

Markup
Commercial

Labor Rate Type
Commercial

Bill From Office
Active

Lead Source
Commercial

Save

If you do not want to track "Lead Sources" for a particular Customer Type, you can assign a default Lead Source to the customer type and the system will automatically populate that Lead Source when

Inactive Customers will now show up in RED in the Customer List

If you inactivate a customer, they will be listed in red in the Customer list. This will make it obvious that the Customer is inactive. **NOTE** – The system has always shown the “Status” in the listing, but it was easy to overlook the status if you were not specifically looking for it.

All Customers (12) Filters Applied: ja Clear All

QB Sync Print Export

Show Customer Hierarchy Add ja

Name	Address	Phone	Mobile	Email	Join Date	Status	Create Work Order	Action
Jackson_Dave	1780 Winkler Ave Fort Myers Florida 33901		(239) 585-4455	ted@teamservice.com	04/06/2023	Active	Work Order	View
Walden Property Management	784 Walden Rd Montgomery Texas 77356	(111) 111-1111		jamie@mail.com	02/17/2022	Inactive	Work Order	View
Alexander_Janet	4512 Grove Ln Beaufort South Carolina	(111) 111-1111			01/17/2022	Active	Work Order	View
Doe_Jane					01/03/2022	Active	Work Order	View
Bryan_Jason					12/23/2021	Active	Work Order	View
Smith_Janet	78244		(210) 444-2222	stan@equityhomewarr.com	12/06/2021	Active	Work Order	View

Inactive Customers will be displayed in red text in the Customer Listing, making their Inactive Status more noticeable.

Purchase Orders – You now have the ability to re-arrange the order of items on a Purchase Order

The ability to re-arrange the items on a Purchase Order has been added. This works similar to the way that re-arranging items on an Invoice or Quote works. Simply grab the “hamburger” icon to the left of the line you want to move and drag and drop it in the spot you would like it to appear on the Purchase Order.

NOTE – Moving the order of the items on a Service PO will not change the order of the items written to the Invoice. If you want to change the order of the items on the Invoice, you will need to re-arrange the items on the Invoice itself.

Purchase Order - PO-1296

Purchase Order Receiving Slip

Email Print

Ordered By: Nate Created On: 09/12/2023 Last Date Changed: 09/12/2023 Billed to Date: \$0.00

Purchase Order #: PO-1296 PO Date: 09/12/2023 Expected Delivery Date: 09/12/2023 Ship to: Don't Print Status: Open

PO Type: Service Location / Job / Work Order: WO-8136 / Papa Johns-4500 Phase / Change Order: Search and select Work Order: Search and select

Preferred Vendor: Johnstone Supply Email: wmosborn@me.com Markup: Commercial Class: Commercial

Notes: No Charge Mark PO as Void

Move the line you want for re-arrange by dragging and dropping the "hamburger" icon in the order you want the item to appear.

Item	Description	Order Qty	Total Received	Distributed Quantity	Rate	Amount	Unit Sell	Class	
MOT002	1/4 hp 1075 RPM	1.00	0.00	0.00	50.0000	\$50.0000	112.50	Commercial	
Weight Cost	Shipping	1.00	0.00	0.00	24.5500	\$24.5500	67.51	Commercial	
BLT007	Motor Adjustment Kit	1.00	0.00	0.00	10.5800	\$10.5800	31.74	Commercial	
CAP003	7.5 Mfd 370V	1.00	0.00	0.00	9.0000	\$9.0000	31.50	Commercial	

Search and select Total \$94.13

Communication Template – A new Communication Template has been added that will send out a reminder that a Service Agreement is going to be renewed in the near future

A new “Agreement Advance Auto-renewal Reminder” template has been added to the Communication Templates. This template is designed to send an advanced notice to your customer’s letting them know that their service agreement is going to be automatically renewed in the near future. This should eliminate the surprise when they get billed or their credit card gets charged if you are using the Auto Credit Card billing feature. This template will only be sent to customers that you have marked to receive the advanced reminder on the Service Agreement General screen. A good example of when this feature would be used is if you are doing Auto Credit Card billing annually for a service agreement renewal, as opposed to monthly.

Edit Agreement - Jenkins, Richard [Cancel] [Save]

Jenkins, Richard
5814 Pinehurst Greens Ct, Estero, Florida, 33913
nmtuttle@gmail.com

General | Billing Schedule | Maintenance Schedule

Agreement Number * SA-396-02 | Agreement Plan * Gold 1 Annual

Items PMA 1 Annual | Problem Code * Insp 1

Reference Id | Tags

Agreement Period
 Recurring Auto Renewal **Renewal Reminder**

Original Start Date * 09/14/2020 | Contract Start Date * 09/14/2022 | Expiration Date * 09/13/2023

Renewal Price Type
 Current Price Contract Price

Place a check mark in the "Renewal Reminder" field if you want the system to send an advanced notice that the service agreement is going to be automatically renewed in the near future.

The communication Template associated with this field is called "Agreement Advanced Autorenewal Reminder"

Company - Communication Templates [Save]

Basic Details

Template Agreement Advance Autorenewal Reminder | Exclude Customer Type

No of days before the reminder should be sent 15 | No of days after the reminder should be sent

Only allow manual sending | Send At (Approximate) 09:00

Email | SMS | Phone

This template is used to specify the message that will be sent to a customer when the system will renew their service agreement on a nearby date.

Active

Reply to Address sales@servicefactor.com | BCC nate@teamservice.com

Subject * Service Agreement with AA Service Company will automatically renew soon.

Email Body

Insert Codes
Use the following codes to customize your communication
Customer Displayname Customer Firstname Customer Lastname

Use the "Agreement Advance Autorenewal Reminder" Template to send a reminder to customers that their agreement is going to be renewed in the near future.

Invoices – When you print an invoice or quote, it will now save the PDF with the invoice or quote number in the name, as opposed to the date

When you print an invoice, the system automatically saves it to your “Downloads” folder as a PDF file. Prior to this update, the system would save the PDF with a name such as “Print_Invoice_09-13-2023.pdf”, “Print_Invoice_09-13-2023 (1).pdf”, “Print_Invoice_09-13-2023 (2).pdf”, etc. If you wanted to move invoices from the downloads folder to somewhere else, it would be difficult to know which invoice you wanted to move without opening the file(s) if you printed multiple invoices for the day. Now when you print invoices from SF, the PDF will be saved with the invoice number in the description, such as “Print_Invoice_F-7116.pdf”, “Print_Invoice_A-6487.pdf”, “Print_AIA_Invoice_J-1432.pdf”, “Print_JobInvoice_J-451.pdf”, etc.

The screenshot shows a file explorer window with columns for Name, Date modified, Type, and Size. It is divided into three sections: Today (6), Last month (7), and Earlier this year (53). In the 'Today' section, files are named with invoice numbers (e.g., Print_Invoice_F-7116.pdf). A red box highlights these files, and a callout box explains: "The printed invoice and quote PDFs are now saved with the Invoice or Quote Number as part of the name". In the 'Earlier this year' section, files are named with dates (e.g., Print_AIA_Invoice_06-22-2023 (1).pdf). A red box highlights these files, and a callout box explains: "Prior to this release, the invoice and quote PDFs were saved with the date they were printed in the name".

Service Agreements – Copying an inspection from one month to additional months has been enhanced

When you use the “Copy” feature to copy inspection information from one month to another, the copy screen has been enhanced to show you what month you are copying from and to which months you want to copy to. This should help eliminate confusion.

The screenshot shows a dialog box titled "Copy Selected Inspection Details to Additional Inspections". It has a close button (X) in the top right corner. The dialog is divided into two sections: "Selected Inspection" and "Target Inspection(s)". Under "Selected Inspection", there is a checked checkbox for "07/01/2023 - Insp 2". Under "Target Inspection(s)", there are two checked checkboxes: "10/01/2023 - Insp 2" and "05/01/2024 - Insp 2". At the bottom right, there are "Save" and "Cancel" buttons. A callout box points to the checkboxes and says: "Copy inspection screen is now more intuitive".

Invoice Listing – “N/A – Not Applicable” Review Status has been added to the Advanced Filter

The “Review Status” option “N/A – Not Applicable” has been added to the Advanced Filter option. If you are using the Review Status feature, you can go into the Advanced Filter and filter by the “N/A” option so that once you have reviewed the invoices and changed the Review Status to “Reviewed”, they will no longer appear in the list. This will eliminate the possibility of going back into invoices that you have already reviewed because they are still showing up on the list.

Invoice Listing – An option to “Exclude Quick Post Invoices” has been added to the Advanced Filter

If you are using the Quick Post feature, you can go into the Advanced Filter and filter out any invoices that have been marked for “Quick Post”, but have not yet been posted to Accounting. This will eliminate the possibility of going back into invoices that you have already reviewed because they are still showing up on the list.

NOTE – when setting the filters mentioned above while verifying invoices, it is recommended that you place a check mark in the “Lock Filter” so that when you go back into the Invoice Listing, the filter you set remains.

The screenshot shows the 'All Invoices (1440)' interface. The 'Completed' filter is selected in the top navigation bar. The 'Review Status' dropdown is set to 'N/A'. The 'Exclude Quick Post Invoices' checkbox is checked. The 'Lock Filter' checkbox is also checked. A 'GO' button is visible at the bottom right of the filter panel.

Invoice #	Site Name	WO #	PO #	Invoice Date	Due Date	Total	Balance	Technician
F-7125	Crain, Hannah	WO-3038	0	09/12/2023	09/12/2023	\$272.00	\$272.00	Billy Bob
A-2521	Campo, Kristen	WO-2929		09/12/2023	09/12/2023	\$159.00	\$159.00	Billy Bob
F-6582	Green, Jennifer	WO-7559		09/12/2023	09/12/2023	\$159.00	\$0.00	Billy Bob
F-1018	Alco, Jonathan	WO-1168		01/15/2020	01/15/2020	\$0.00	\$0.00	
F-7122	Wells, Christy	WO-8145		09/12/2023	09/12/2023	\$830.90	-\$0.01	Brett
A-6486	William Osborn	WO-7448		09/12/2023	09/12/2023	\$20.64	\$0.00	Brett
J-452	KNA	WO-8139		09/12/2023	09/12/2023	\$5,000.00	\$5,000.00	
A-7107	McDonald's #14777	WO-812		09/08/2023	09/08/2023	\$0.00	\$0.00	Drew
A-7110	Wasik, Matt	WO-813		09/08/2023	09/08/2023	\$0.00	\$0.00	Drew
A-7060	McDonalds #6887	WO-807		09/08/2023	09/08/2023	\$0.00	\$0.00	Drew
A-6966	Taco Bell #6231	WO-797		09/08/2023	09/08/2023	\$0.00	\$0.00	Drew
A-7108	Adkins, Jenny	WO-812		09/08/2023	09/08/2023	\$0.00	\$0.00	Drew
F-7101	Tinsley, Nicole	WO-812		09/08/2023	09/08/2023	\$0.00	\$0.00	Brett
A-7104	Moss, Mike	WO-812		09/08/2023	09/08/2023	\$0.00	\$0.00	Brett
F-7099	Jones, Riley	WO-811		09/08/2023	09/08/2023	\$0.00	\$0.00	Brett

Annotations:

- Completed Filter:** A red box highlights the 'Completed' filter in the top navigation bar.
- Review Status:** A red box highlights the 'Review Status' dropdown menu, which is set to 'N/A'. A red arrow points from the text box to this dropdown.
- Exclude Quick Post Invoices:** A red box highlights the 'Exclude Quick Post Invoices' checkbox, which is checked. A red arrow points from the text box to this checkbox.
- Lock Filter:** A red box highlights the 'Lock Filter' checkbox, which is checked. A red arrow points from the text box to this checkbox.
- GO Button:** A red box highlights the 'GO' button at the bottom right of the filter panel. A red arrow points from the text box to this button.

Text Boxes:

- Top Box:** "If using the 'Review Status' feature when invoicing 'Completed' invoices, choose the option 'N/A' in the 'Review Status' drop down in the Advanced Filter to only display invoices needing to be processed." (Red border)
- Middle Box:** "If you are marking 'completed' invoices to be Quick Posted after reviewing them, place a check mark in the 'Exclude Quick Post Invoices' check box so that they will no longer be displayed after marking them for Quick Post, but prior to actually posting them." (Blue border)
- Bottom Box:** "Be sure to take advantage of the 'Lock Filter' feature" (Blue border)

Reports – A new Customer Contact List Report has been added

A new report has been added to the system that will allow you to search for any contacts in the system, whether it be a Primary Contact or a Secondary Contact, by a Phone or Mobile Number, Contact Name or Email Address. This will make it easy to find any records with a specific contact if the contact information changes. For example, if you have a contact associated with many sites and the contact leaves, you can use this report to find all customers with that contact and drill into each record from the report and make the proper changes.

Customer Contact List Report

Wednesday, September 13, 2023

Customer Name	Contact Name	Phone	Mobile	Email
Bess, Dennis	William Fav Child	(817) 881-3949	(214) 557-8477	william@servicefactor.com
Cleoney, George			(121) 324-3256	william@servicefactor.com
Conanan, Ray	Ray	(214) 555-1414	(832) 859-5382	william@servicefactor.com
Conanan, Ray	Ray			william@servicefactor.com
Corp. Office	Berry			william@servicefactor.com
Gateway Property Management	William Renter			william@servicefactor.com
Jones, George	George	(111) 111-1111	(210) 445-5944	william@servicefactor.com
Lalimer	George - Maintenance			william@servicefactor.com
Mitchell, Julie	Julie		(239) 707-0243	william@servicefactor.com
Ransom, Cindy	William			william@servicefactor.com
Rodriguez, Juan	Nate	(239) 437-8898		william@servicefactor.com
TMS	William	(239) 437-8898	(817) 881-3949	william@servicefactor.com
Trompo Taqueria Plano	Amy		(817) 881-3949	william@servicefactor.com
Walgreens	Sue Manager	(214) 555-7478	(817) 881-3949	william@servicefactor.com
XYZ Company	William			william@servicefactor.com

FILTER BY [Clear All](#)

Customer Name:

Contact Name:

Phone/Mobile:

Email:

ADDITIONAL SELECTIONS

Sort By:

SubTotal By:

Go

Reports – Estimated Inspection Time has been added to the Scheduled Calls Report and Unassigned Calls Report

The Estimated Inspection Time has been added to the Scheduled Calls Report and Unassigned Calls Report, which will allow you to review how much overall estimated inspection time will be needed for Inspection Work Orders. The Estimated Inspection time comes from the Maintenance Schedule screen of the Service Agreement.

Scheduled Calls Report

Wednesday, September 13, 2023

WO #	Taken Date	Status	Phone	Tech	Sched Date	Sched Time	Est Time	Est Insp Time
WO-7951	8/2/2023	Posted		Chuck Tuttle	8/2/2023	9:29 AM - 11:14 AM	01:45	02:00
Adkins, Jenny			1180 E Sandy Lake Rd, Coppell, TX, 75019					
WO-7917	8/1/2023	Assigned	(817) 881-3949	Chuck Tuttle	8/2/2023	11:36 AM - 1:21 PM	01:45	02:15
Kelly, Bryan			5554-3 Malt Drive, Fort Myers, FL, 33907					
Sub Total Count:	2						03:30	04:15
Total Count:	2						03:30	04:15

Estimated Inspection Time column has been added to Scheduled and Unassigned Calls Reports

FILTER BY [Clear All](#)

SCHEDULED DATES [clear](#)

From * To *

PROMISED DATES [clear](#)

From To

SF Mobile – Lead Source will be automatically filled in when adding a Work Order if it has been assigned to the Customer Type

If you have assigned a Lead Type to a Customer Type (as mentioned earlier), the lead type will be automatically populated when adding a Work Order for the specific customer type in ServiceFactor Mobile.