

SF Release Notes: December 7, 2023

Purchase Order Receiving Slip – Items that have been received in full will be highlighted in blue.

If you partially receive a Purchase Order and add an additional Receiving Slip, any lines that have been received in full will be highlighted in blue and lines that still need to be received will be white. This will make it easier to quickly see which lines still need to be received.

The screenshot shows the 'Receiving Slip - (Inventory PO #: PO-1311)' interface. It includes fields for PO Type (Inventory), Location / Job / Work Order (Truck 102), and Vendor (Johnstone Supply). There are also fields for Date Received (12/06/2023), Packing Slip #, Invoice Total, Invoice #, Terms, Invoice Date, and Due Date. A 'Receive All' button is present. Below these fields is an 'Items' table with columns: Item, Description, Order Qty, Received, Total Received, Rate, Amount, Unit Sell, and Complete. The table contains 8 rows of items. The first, third, fourth, and eighth rows are highlighted in blue, indicating they have been received in full. The second, fifth, sixth, and seventh rows are white, indicating they still need to be received. A callout box points to the blue rows with the text 'Blue lines indicate that the item has been received in full.' Another callout box points to the white rows with the text 'White lines indicates that items still need to be received.'

Item	Description	Order Qty	Received	Total Received	Rate	Amount	Unit Sell	Complete
BLT003	4A Type 36" V-Belt	1.00	0	1.00	\$7.4300	\$0.0000	0.00	<input checked="" type="checkbox"/>
CAP003	7.5 Mfd 370V Premium Capacitor	13.00	0	10.00	\$9.0000	\$0.0000	0.00	<input type="checkbox"/>
CAP005	12.5 Mfd 370V Premium Capacitor	5.00	0	5.00	\$18.0000	\$0.0000	0.00	<input checked="" type="checkbox"/>
FLT113	Air Bear 20 x 20 x 5 Replacement Filter	3.00	0	3.00	\$26.3600	\$0.0000	0.00	<input checked="" type="checkbox"/>
FLT2020	20 X 20 X 1 Disposable Filter	96.00	0	50.00	\$5.5000	\$0.0000	0.00	<input type="checkbox"/>
MOT0025	U.S. Motors 3323	2.00	0	0.00	\$82.0000	\$0.0000	0.00	<input type="checkbox"/>
MOT004	1/2 hp 1075 RPM 230V Cond Mtr	1.00	0	1.00	\$105.1400	\$0.0000	0.00	<input checked="" type="checkbox"/>

Total \$0.00

Purchase Order Receiving Slip – When you click in the “Receive Field” the value will automatically be highlighted

Clicking in the Received Field will automatically highlight the value. Prior to this release, you would have to double click the value to highlight it.

This is a close-up of the 'Items' table from the previous screenshot. The 'Received' field for the second row (CAP003) is highlighted in blue. A callout box points to this field with the text 'Clicking the Received Field will automatically highlight the value'.

Item	Description	Order Qty	Received	Total Received	Rate	Amount	Unit Sell	Complete
BLT003	4A Type 36" V-Belt	1.00	0	1.00	\$7.4300	\$0.0000	0.00	<input checked="" type="checkbox"/>
CAP003	7.5 Mfd 370V Premium Capacitor	13.00	0	10.00	\$9.0000	\$0.0000	0.00	<input type="checkbox"/>
CAP005	12.5 Mfd 370V Premium Capacitor	5.00	0	5.00	\$18.0000	\$0.0000	0.00	<input checked="" type="checkbox"/>

Purchase Orders Receiving Slip – Option has been added to automatically fill in the remaining quantity

A new option has been added to automatically fill in the remaining quantity in the Received field. If you ordered a quantity of 10 and have not yet received any, clicking the Auto Fill icon will enter 10 into the Received field. If you ordered a quantity of 10 and you previously received 6, clicking the Auto Fill icon will enter 4 in the Received field.

➤ The Auto Fill icon is the double arrow icon that appears to the left of the Received field.

Receiving Slip - (Inventory PO #: PO-1311) Print Save

Receiving Slip Vendor Bill

PO Type: Inventory Location / Job / Work Order: Truck 102 Vendor: Johnstone Supply

Date Received: 12/06/2023 Packing Slip #: Packing Slip Number Invoice Total: Invoice Total Invoice #: Invoice Number

Terms: Terms Invoice Date: Invoice Date Due Date: Due Date

Receive All

Item	Description	Order Qty	Received	Total Received	Rate	Amount	Unit Sell	Complete
BLT003	4A Type 36" V-Belt	1.00	0	1.00	\$7.4300	\$0.0000	0.00	<input checked="" type="checkbox"/>
CAP003	7.5 Mfd 370V Premium Capacitor	13.00	3	10.00	\$9.0000	\$0.0000	0.00	<input checked="" type="checkbox"/>
CAP005	12.5 Mfd 370V Premium Capacitor	5.00	0	5.00	\$18.0000	\$0.0000	0.00	<input checked="" type="checkbox"/>
FLT113	Air Bear 20 x 20 x 5 Replacement Filter	3.00	0	3.00	\$26.3600	\$0.0000	0.00	<input checked="" type="checkbox"/>
FLT2020	20 X 20 X 1 Disposable Filter	96.00	0	50.00	\$5.5000	\$0.0000	0.00	<input type="checkbox"/>
MOT0025	U.S. Motors 3323	2.00	0	0.00	\$82.0000	\$0.0000	0.00	<input type="checkbox"/>
MOT004	1/2 hp 1075 RPM 230V Cond Mtr	1.00	0	1.00	\$105.1400	\$0.0000	0.00	<input checked="" type="checkbox"/>

Total \$0.00

Work Orders Payment Tab – The card on file will display the Card type and last 4 digits of the credit card in the drop down

If you have a card on file, the payment type listing will show the card type and last 4 digits of the Card on File in the drop down.

The screenshot shows the 'Payment (Invoice No - A-2499)' section. At the top, there are summary cards for 'Paid/Last Paid', 'Total Invoice (\$426.00)', 'Amount Paid (\$0.00)', and 'Remaining Balance (\$426.00)'. Below these is a table with columns: Type, Date, Reference, Notes, Card Brand, Amount, Action, and Refunded. The table currently shows 'No records found'. A dropdown menu is open for 'Type', listing options: '--Select Payment Type--', 'Card On File - Visa XX-1119', 'Cash', 'Check', 'Credit Card', 'Deposit', and 'Wells Fargo'. A blue box with text points to the 'Card On File' option.

Payment (Invoice No - A-2499)

Paid/Last Paid: -

Total Invoice: \$426.00

Amount Paid: \$0.00

Remaining Balance: \$426.00

Type	Date	Reference	Notes	Card Brand	Amount	Action	Refunded
No records found							

--Select Payment Type--

- Select Payment Type--
- Card On File - Visa XX-1119
- Cash
- Check
- Credit Card
- Deposit
- Wells Fargo

If you have a Card on File, the Card Type and last 4 digits of the CC # will now be displayed in the Payment Type Drop Down

Timeline – Timelines will now have an option for All Years

All Timelines will now have an “All Years” option, which will be the default selection. Prior to this release, the timeline would default to the current year. In the example below, the timeline shows the entries from 2020. Prior to this release, the timeline would have been defaulted to the current year (2023) and would not show any entries unless you change the drop down to 2020.

The screenshot shows the 'Timeline' section for 'Invoice A-2499'. At the top, there are summary cards for 'Timeline', 'Timesheet', 'Invoice', 'Payments', 'Quote', and 'Purchase Order'. Below these is a dropdown menu for 'All Years' (selected), an 'Add Note' button, and a 'Keyword Search' field. The timeline shows three entries from 2020. A blue box with text points to the 'All Years' dropdown.

Timeline Last - 10/29/2020 On Record - 7

Timesheet Worked - 2.00 Traveling - 0.00

Invoice Invoiced - \$426.00 Balance - \$426.00

Payments Total - \$0.00 Last Paid - None

Quote Primary - Good Amount - \$0.00

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

All Years

Add Note

Keyword Search

Attachments(0)

Enter Description

No records found.

10/29/2020

- William Invoice A-2499 was posted with amount \$426.00 for the Workorder WO-2905 04:16 PM
- William Invoice A-2499 was changed from \$0.00 to \$426.00 for the Workorder WO-2905 04:16 PM

10/26/2020

- William Workorder WO-2905 status was changed to Completed for Tricia 10:41 AM

The timeline now has an option for All Years, which will now be the default

Customer File – You can now put a customer on Credit Hold

A new Credit Hold slider has been added to the Customer File. If you put a Customer on Credit Hold, each time you add a Work Order, Quote, Job, Service Agreement or Invoice Only Invoice, you will be prompted that they are on credit hold and verify that you wish to continue. The Customer Timeline will track the Date, Time and User that adjusted the Credit Hold slider.

The screenshot shows the 'Edit Customer' form with the following fields:

- First Name: Bryan
- Last Name: Kelly
- Company Name: Company Name
- Customer Type: Residential
- Is a Sub Customer of: Search and select
- Display Name: Kelly, Bryan
- Tags: (empty)
- Credit Hold: YES (indicated by a red box and an arrow)

Below the form, there are tabs for 'Site Information', 'Payment Settings', and 'Customer Portal'. The 'SITE ADDRESS' section includes fields for Address Line 1 (5554-3 Malt Drive), Address Line 2, City, State Code, Zip, Zone, Color, and Country. A map is also visible.

Credit Hold slider has been added to the Customer File

Confirmation dialog box with the text: "Customer is on Credit Hold. Do you wish to continue?" and two buttons: "No" and "Yes".

The screenshot shows the Customer Timeline with the following records:

- 12/06/2023: Nate - Credit hold status for the customer has been activated. 11:23 AM (highlighted with a red box)
- 11/14/2023: Nate - Invoice F-7134 was changed from \$5,458.85 to \$5,288.45 for the Workorder WO-8156. 04:27 PM
- 11/08/2023: Nate - SMS Flag was enabled. 11:31 AM

Navigation and summary information at the top includes: Timeline (Last - 12/06/2023, On Record - 38), Work Orders (Open - 4, Completed - 4), Equipment (Total - 1), Agreements (Active - 1, Total - 2), Invoice (Invoiced - \$17,092.50, Balance - \$10,000.00), and Quotes (Total - 2).

System will automatically record the Date, Time and who activated or deactivated the Credit Hold slider in the Timeline

Service Agreements – ‘Terms’ have been added to the Service Agreement

A separate ‘Terms’ field has been added to the Service Agreement file. Prior to this release, the Service Agreements would use the Terms from the Customer File. This will allow you to have different Terms for Service Agreement Invoices than Regular Invoices in ServiceFactor.

NOTE – The system will automatically pull the terms over from the Customer File to the Service Agreement, but can be overridden if Applicable.

Edit Agreement - Kelly, Bryan Cancel Save

Kelly, Bryan
5554-3 Malt Drive, Fort Myers, Florida, 33907
(817) 881-3949
william@teamservice.com

General Billing Schedule Maintenance Schedule

Agreement Number * SA-715-01 Agreement Plan * Gold 1 Annual Active

Items PMA 1 Annual Problem Code * Insp 1 Class Residential

Reference Id Terms Tags

Agreement Period
 Recurring Auto Renewal Renewal Reminder

Original Start Date * 07/01/2023 Contract Start Date * 10/11/2023 Expiration Date * 10/10/2024

Renewal Price Type
 Current Price Contract Price

A Terms field has been added to the Service Agreement that will allow you to have different payment terms for the Service Agreement than Regular Invoices

Service Agreements – A new ‘Inspection Notes’ field has been added to the Inspection Schedule

An Inspection Notes field has been added to the inspection schedule so that you can record additional information about the particular inspection. The notes will be added to the Problem Reported field when the Inspection Work Order is created, and will be seen by technician’s in ServiceFactor Mobile. **NOTE** - If you use the Copy Inspection feature, the notes will be copied to the additional inspections, along with the other Inspection Information.

Notes ✕

Notes

Perform 12 Point Tune Up. Be sure to clean drain lines, as they have had issues with clogs between inspections. They also have supplies in each bedroom that take a 12X12 filter, do not forget to change them.

Okay

View Agreement - Kelly, Bryan Renew Edit

BK Kelly, Bryan
5554-3 Malt Drive, Fort Myers, Florida, 33907

(817) 881-3949

william@teamservice.com

General **Billing Schedule** Maintenance Schedule

Allow to Schedule Online NO

Name / Description: Bryan
 Mobile: (239) 707-0243
 Phone: (817) 881-3949
 Email: william@teamservice.com

Inspection schedule

Confirmation	WO #	Problem Code	Est. Time	Equipment	Schedule date	Next Date	Non Billable	Billable	Amount(\$)	
<input checked="" type="checkbox"/>		Insp 1 Tags Insp_Notes*	2.25	89446			FLT12X12	PMA Gold	275.00	Skip
<input checked="" type="checkbox"/>		Insp 1 Tags Insp_Notes*	2.25	89446			FLT12X12	PMA Gold	275.00	Skip

Click the "Insp Notes" link to open the Inspection Notes. The red dot next to the link indicate that there are Inspection Notes.

Update Workorder - WO-8603 Save

BK Kelly, Bryan
5554-3 Malt Drive, Fort Myers, Florida, 33907
(817) 881-3949 (239) 707-0243
william@teamservice.com

Work Order Invoice

Additional Information Tags History

Payment Status
Overdue: Open
\$ 10,000.00 \$ 10,275.00

Site Tags
None

Agreement
SA-715-01 - Gold 1 Annual
Oct 2023 Oct 2024

Equipment
89446 - PHOTO - Photoelectric Smoke

Name / Description: Bryan
 Mobile: (239) 707-0243
 Phone: (817) 881-3949
 Email: william@teamservice.com

Problem Code *: Insp 1
 Class: Residential:Maintenance
 Estimated Time: 01:45
 Priority:

Lead Source *: Existing Customer
 Service Agreement*: SA-715-01 - GOLD1A
 Business Ent:

Zone: South FM
 Color: ■
 Tags:

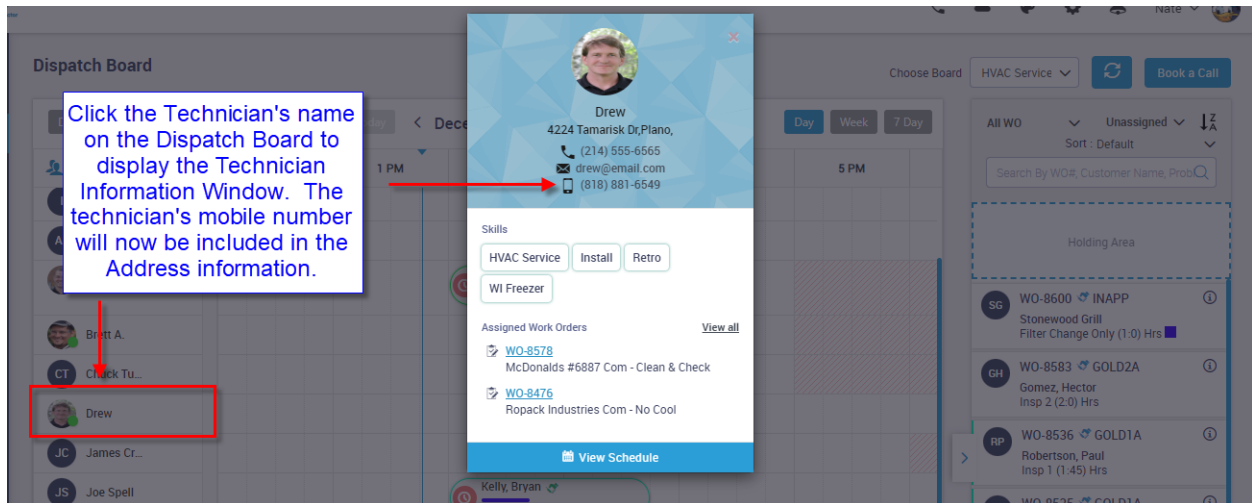
Problem Reported
 Seasonal Inspection on 1 System
 -Inspection Notes-
 Perform 12 Point Tune Up. Be sure to clean drain lines, as they have had issues with clogs between inspections. They also have supplies in each bedroom that take a 12X12 filter, do not forget to change them.
 PMA Gold QTY 1.00
 FLT12X12 QTY 1.00 ID : 89446 - PHOTO

Site Notes
 Gate code #2321

Inspection Notes will appear in the Problem Reported section of the Inspection Work Order. The technician's will be able to see the notes in ServiceFactor Mobile

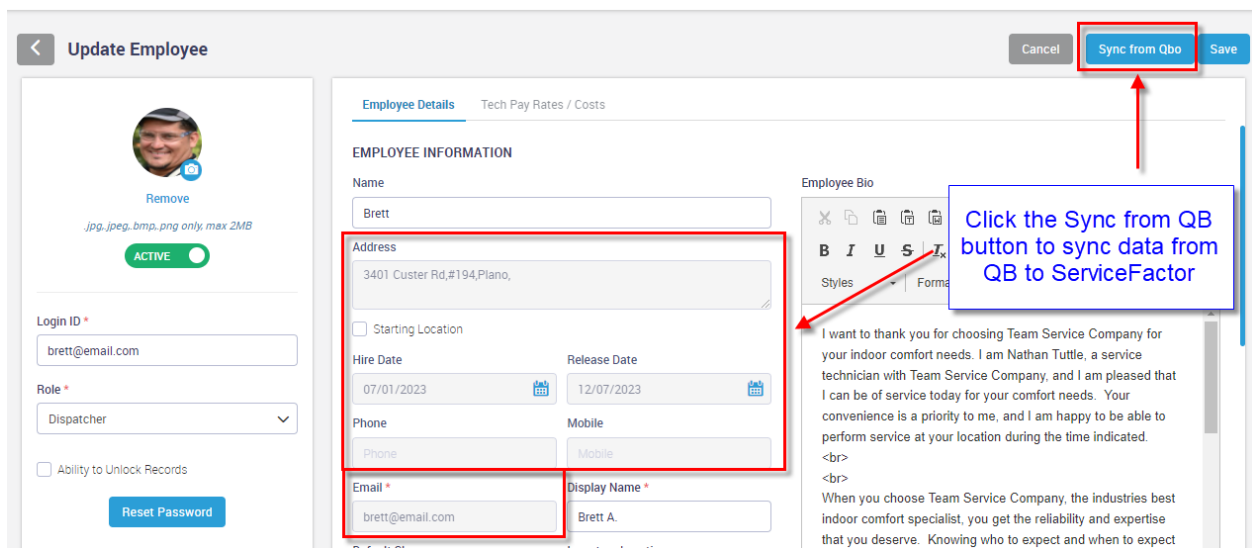
Dispatch Board – The Technician’s mobile number will now be displayed in the Technician Information Screen

If you click on the Technician’s name on the Dispatch Board, their mobile number will now be displayed in the Address information section.



Employee File – Sync from QB Button has been added to individual employees


A Sync from QB button has been added to the Employee Information screen that will allow you to sync the data from QB into ServiceFactor for an individual employee. The information that will be synced from QB is the Address, Hire Date, Release Date, Phone Number, Mobile Number and Email Address. This will allow you to sync an individual employee’s information as opposed to all employees.



Project Management – You can now create a Quote from a Change Order

You now have the ability to create a Quote from a Change Order. The quote feature will allow you to create a quote and if emailed to the customer, it can be accepted online, which will automatically change the Change Order status to Accepted and send an email back indicating that a Change Order Quote has been accepted.

Change Order Quote



[Remove](#)
.jpg, .jpeg, .bmp, .png only, max 2MB

Text Codes
-- Select --

Summary Text*

B I U S | *I*_x | u | **Bulleted List** | **Numbered List** | **Link** | **Unlink** | **Quote** | **Styles** | **Format**

Attention: Mike

Re: Cutting through wall and rerouting ductwork

After reviewing the new plans from the architect that include a new wall, we are pleased to offer you the following proposal:

- Cut through wall and frame it out to accommodate the exposed duct work
- Provide ductwork that is acceptable to be exposed
- All labor will be done based on prevailing wages

Total cost for this portion of work will be **2,900.00**

All quotes are good for a period of 30 days. If the change order is not accepted by this time, we

Quote Date
11/30/2023

Expiration Date
12/30/2023

Follow Up Date
12/07/2023

Total: \$2,900.00

[Print](#) [Email](#) [Save](#) [Save and Close](#)

Change Order Quote you requested from AA Service Company

AA Service
to me

Dear Quiznos,

Thank you for allowing AA Service Company to quote you for the change order requested for our in house job number 22-14, and General Contractor Job Number VM2387443. This quote is for change order number 2, also known as change order name of Cut through wall for work being performed at 5884 Enterprise Pkwy Fort Myers, FL 33901 .

Once you have had a chance to look over the quote, please either accept it or contact us with any specific questions you may have.

Sincerely,
AA Service Company

[Review Quote](#)

[Terms of Service](#)



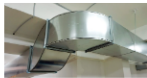
AA Service

11928 Fairway Lakes Drive
Fort Myers FL 33013
(817) 881-3949
sales@teamservice.com

Bill To Address	Site Address	Quotation
Quiznos PO Box 1234 Dallas, TX 75246	Quiznos 5884 Enterprise Pkwy Fort Myers, FL 33901	Date: 11/30/2023 Quote No: CO-3 Exp Date: 12/30/2023 Sales Rep: Billy Bob Job Name: Quiznos Install

Change Order Quote

Cut through wall



Attention: Mike

Re: Cutting through wall and rerouting ductwork

After reviewing the new plans from the architect that include a new wall, we are pleased to offer you the following proposal:

- Cut through wall and frame it out to accommodate the exposed duct work
- Provide ductwork that is acceptable to be exposed
- All labor will be done based on prevailing wages

Total cost for this portion of work will be **2,900.00**

All quotes are good for a period of 30 days. If the change order is not accepted by this time, we reserve the right to revisit the bid for adjustments in pricing if needed.

Exclusions:

- Painting - you will be responsible for painting wall and trim
- Any electrical work that may be needed

Thank you for the opportunity to quote. In the event you have any questions, please do not hesitate to let me know. We look forward to working with you.

Sincerely,

Nate Tuttle

Customer can choose to Accept or Decline the quote online.

ACCEPT DECLINE

Sub Total	\$2,900.00
Tax (6.50 %)	\$0.00
Total	\$2,900.00



AA Service

11928 Fairway Lakes Drive
Fort Myers FL 33013
(817) 881-3949
sales@teamservice.com

If customer accepts (or declines) the quote, they will receive a message acknowledging the acceptance (or decline) of the Quote

Thank you for your trust and confidence in AA Service Company to accommodate your change order needs and for accepting quote number 3. You will be contacted shortly to discuss the next steps and to schedule your job. If you have any questions in the mean time, please do not hesitate to contact the office at (239) 437-8898 or via email at sales@teamservice.com.

Project Management – A new Change Order Listing screen has been added to the Project Management Module

A new Change Order Listing screen has been added to the Project Management module. This screen will allow you to view the status of each change order and will have tabs for “All, Pending, Accepted, In Progress, Completed, Declined and Voided” change orders. The listing will show the Status of each change order, making it quick and easy to know the where you stand on each change order. If a change order was accepted online, the “Accepted” status will be blue type. If the change order was accepted in the office, the status will be in green type.

NOTE – When you click on the Project Management menu, a sub menu will appear to choose if you want to access the Job List or the Change Order List.



A screenshot of the 'Change Order List (108)' screen. At the top, there are tabs for 'All', 'Pending', 'Accepted', 'In Progress', 'Completed', 'Declined', and 'Void'. A red box highlights these tabs, and a text box points to them with the text: 'There is a separate tab for each Change Order Status'. Below the tabs is a search bar with the text 'Search Job #, Job Name, Site'. To the right of the search bar are 'Print' and 'Export' buttons. The main area is a table with the following columns: Job #, Job Name, Site Name, CO Name, C/O Approval Date, Total C/O Amount, Quote Date, Expiration Date, Follow Up Date, Sales Person, and Status. The table contains several rows of data. A red box highlights the 'Accepted' status in the 'Status' column for two rows, and a text box points to them with the text: 'The status of Change Order Quotes accepted online will have blue text'. The 'Accepted' status is shown in blue text for online acceptance and green text for office acceptance.

Job #	Job Name	Site Name	CO Name	C/O Approval Date	Total C/O Amount	Quote Date	Expiration Date	Follow Up Date	Sales Person	Status
23-49	Wilson replacement System	Wilson, Jeff	Condensate Pump		695.00	12/05/2023	01/04/2024	12/12/2023	William	Declined
22-14	Quiznos Install	Quiznos	c2						Billy Bob	Pending
22-14	Quiznos Install	Quiznos	Cut through wall	12/06/2023	2,900.00				Billy Bob	Accepted
22-17	Moss New System	Moss, Lisa - Main	Relocate unit	12/05/2023	1,400.00				William	Accepted
23-48	DOT Lee County HVAC & Pibg	Lee County DOT	Cut through wall	10/01/2023	2,500.00				William	In Progress
23-47	Kelly Retrofit	Kelly, Bryan	New Line Set		500.00	12/05/2023	01/04/2024	12/12/2023		Declined
23-47	Kelly Retrofit	Kelly, Bryan	Move Equipment	11/15/2023	2,400.00	11/15/2023	12/15/2023	11/22/2023		Pending

Project Management – Prevailing Wage tracking has been added

The ability to track Prevailing Wage Hours in Project Management Jobs has been added to the system. You can now define a Job as Prevailing Wage and assign the appropriate Work Classification to each Phase and Change Order of the Job. Every time labor is added to a Phase or Change Order that is set as Prevailing Wage, the proper labor costs will be applied to the job and the Prevailing Wage hours will be recorded. This will allow you to run a Prevailing Wage Hours Report that will report all the Prevailing Wage hours applied to the Job during the Pay Period.

If you have any phases or change orders that do not qualify for Prevailing Wage, you can define them to not track prevailing wage and the hours will not appear on the Prevailing Wage Hours Report and the techs regular costs will be applied to the Job.

When setting up a Job for Prevailing Wage, you assign a Prevailing Wage Code to the Job and then assign the Prevailing Wage work classification from the Wage Code to each phase or change order.

NOTE – Please contact ServiceFactor Support to turn on the Prevailing Wage feature if applicable for your company.

Edit Prevailing Wage Code

Name *
Lee County 2023 Active

Set up Prevailing Wage Codes in the Settings and add the different Work Classifications and Rates for each type of work that will be performed

Task Name	RT Pay Rate	RT Fringe	OT Pay Rate	OT Fringe	Action
Plumbing	40.000	11.500	60.000	11.500	
HVAC	43.000	12.250	64.500	12.250	
Carpentry	40.000	13.800	60.000	13.800	

Add Task

Save

Job Details

Lee County DOT
5650 Enterprise Pkwy, Fort Myers, Florida, 33905
(239) 555-2122 mikeb@mail.com

ACCEPTED

Additional Information

Contract Amount	\$460,850.00
Billed To Date	\$0.00
Variance	\$460,850.00

Timeline
Last - 11/29/2023
On Record - 5

Job Info
Base - \$460,850.00
C/O - \$2,500.00

Phases
Base - 3
Changes - 1

Billing
Total - \$463,350.00
Balance - \$463,350.00

Work Orders
Total - 5
Posted - 0

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

DOT Lee County HVAC & Plbg
Prevailing Wage: Lee County 2023
Job #: 23-48

Assign a Prevailing Wage Code the Job.

Status: Accepted
Job Name: DOT Lee County HVAC & Plbg
Approval Date: 10/01/2023
Approver: William

Bill To: Lee County DOT
General Contractor Job #: LCG202310432
Business Entity: Installation
Lead Source: Commercial

Bill To: 1845 Metro Pkwy, Fort Myers, Florida, 33902 (239) 878-4412
Note: Install HVAC and Plumbing per drawings.

Print Save

Job Details | Timeline | Job Info | Phases | Billing | Work Orders | Purchase Order

Lee County DOT
5650 Enterprise Pkwy, Fort Myers, Florida, 33905
(239) 555-2122 | mikeb@mail.com

ACCEPTED

Additional Information

Contract Amount: \$460,850.00
Billed To Date: \$0.00
Variance: \$460,850.00
C/O Amount: \$2,500.00
C/O Billed To Date: \$0.00
Variance: \$2,500.00

DOT Lee County HVAC & Plbg
Job #: 23-48

Base Job | Change Order

HVAC | Shop Fab... | Plumbing

Use Tax

Status: In Progress | Markup: Commercial | Class: Installation | Problem Code: JC - HVAC

Business Entity: Installation | Estimated Start Date: 10/01/2023 | Estimated End Date: 03/31/2024 | Grouping:

Manual: YES

Prevailing Wage Task: HVAC

	Subcontractor	Material	Labor	Hours	Misc.	Total
Estimated	4500.00	50250.00	27625.00	500.00	0.00	\$82,375.00
Committed	\$650.00	\$0.00	\$6,310.00	07.01	\$0.00	\$6,960.00

Assign the proper Work Classification to each Phase or Change Order

Job Details | Timeline | Job Info | Phases | Billing | Work Orders | Purchase Order

Lee County DOT
5650 Enterprise Pkwy, Fort Myers, Florida, 33905
(239) 555-2122 | mikeb@mail.com

ACCEPTED

Additional Information

Contract Amount: \$460,850.00
Billed To Date: \$0.00
Variance: \$460,850.00
C/O Amount: \$2,500.00
C/O Billed To Date: \$0.00
Variance: \$2,500.00

DOT Lee County HVAC & Plbg
Job #: 23-48

Base Job | Change Order

HVAC | Shop Fab... | Plumbing

Use Tax

Status: In Progress | Markup: Commercial | Class: Installation | Problem Code:

Business Entity: Installation | Estimated Start Date: 11/29/2023 | Estimated End Date: 11/29/2023 | Grouping:

Manual: YES

Prevailing Wage Task: OFF

	Subcontractor	Material	Labor	Hours	Misc.	Total
Estimated	0.00	12000.00	3230.00	85.00	0.00	\$15,230.00
Committed	\$0.00	\$0.00	\$1,675.00	4.50	\$0.00	\$1,675.00

If a Phase or Change Order doesn't qualify for Prevailing Wage, you can turn it Off for the appropriate Phases or Change Orders

Wednesday, December 6, 2022 Prevailing Wage Hours Report 1/1

Job Number: 23-48 | Job Name: DOT Lee County HVAC & Plbg
Billing: Lee County DOT | Site: Lee County DOT
1845 Metro Pkwy | 5650 Enterprise Pkwy
Fort Myers, FL 33902 | Fort Myers, FL 33905

Payroll #: 3 | For week ending: 10/29/2023 | GC Job #: LOG202310432

Employee Name	No of Withholding Exemptions	Work Classification	OT or ST	Day and Date							Total Hours	Rate of Pay		Prevailing Gross Amount Earned
				Mon 23	Tue 24	Wed 25	Thu 26	Fri 27	Sat 28	Sun 29				
				Hours Worked Each Day										
Chuck Tuttle - 4434	4	HVAC	o		1.37					1.37	\$76.75		\$1586.95	
			s	4.00	8.00	7.50	7.32			26.82	\$43.00	\$12.25		
Dennis Jordan - 8925	2	HVAC	o			1.37				1.37	\$76.75		\$933.90	
			s		7.00	8.00				15.00	\$43.00	\$12.25		
Totals			o	0.00	0.00	1.37	1.37	0.00	0.00	2.74			\$2520.85	
			s	0.00	4.00	15.00	8.00	7.32	0.00	41.82				

Payroll - Time Entry Screen will alert you if time exceeds one day

If you have labor time that has an end date that is different than the start date, the hours and date fields will have red text in the Time Entry screen. This should alert you that there could be an issue with the particular time so that you can correct it if applicable.

Time Entries - Brett A. RT Hrs:- 30.32 OT Hrs:- 0.00 Total Hrs:- 30.32 Print Export

From 12/05/2023 To 12/05/2023 Go Adjust to Overtime QB Sync Add

Date	Description	Start Time	End Time	Duration (Hrs)	Duration (Hrs:Mins)	Accumulated RT (Hrs:Mins)	Accumulated OT (Hrs:Mins)	Overtime	Class	Actions
12/05/2023	Working at WO-8590	09:10 AM	09:13 AM	0.05	00:03	00:03	00:00	NO	Residential	
12/05/2023	Traveling at WO-8499	12:43 PM	12:58 PM	0.25	00:15	00:18	00:00	NO	Installation	
12/05/2023	Working at WO-8499	12:58 PM	07:59 AM	19.02	19:01	19:19	00:00	NO	Installation	
12/05/2023	Idle	12:59 PM	11:59 PM	11	11:00	30:19	00:00	NO	Residential	

15 Showing 1 Labor records with an End Date that is different than the Start Dates will appear in Red

Reports – Technician Time Report will alert you if time exceeds one day.

If you have a labor time that has an End Date that is different than the Start Date, the hours and date columns will have Red Text. This should quickly alert you to records that may have an issue.

Wednesday, December 6, 2023 Tech Time Report 1/1

Site Name	Work Order #	Date	Class	Travel RT	Travel OT	Working RT	Working OT	Posted
Tech: Brett A.								
Frederick, Michele	WO-8499	12/05/2023	Installation	0:15	0:00	0:00	0:00	
Frederick, Michele	WO-8499	12/05/2023	Installation	0:00	0:00	19:01	0:00	
Morsert, Ryan	WO-8590	12/05/2023	Residential	0:00	0:00	0:03	0:00	
Subtotal for Tech: Brett A.				Total Time: 19:19	0:15	0:00	19:04	0:00
Tech: Joe Spell								
Wilson, Jeff	WO-8597	12/05/2023	Installation				0:00	✓
Subtotal for Tech: Joe Spell				Total Time: 7:40			0:00	
Tech: Shea Allan								
Wilson, Jeff	WO-8597	12/05/2023	Installation				0:00	✓
Subtotal for Tech: Shea Allan				Total Time: 7:40			0:00	

Labor records with an End Date that is different than the Start Dates will appear in Red

Reports – Sales Tax and Use Tax Reports now have a Summary Feature

The Sales Tax and Use Tax Reports will now print a summary of each tax region by default, as opposed to printing the details. If you want to print the Details, you can place a check mark in the ‘Show Detail’ check box in the report filters.

Wednesday, December 6, 202 Sales Tax Report 1/1

10/2023

Tax Region	Tax Percent	Count	Non Taxable	Taxable	Tax Amount	Invoice Total
AL 4%	4.000%	1	100.00	0.00	0.00	100.00
Dallas	0.000%	4	212.50	540.92	0.00	753.42
Due on Receipt	0.000%	1	0.00	25.00	0.00	25.00
Exempt	0.000%	8	-1,475.00	272.50	0.00	-1,202.50
FL-Lee	6.250%	21	11,442.04	1,288.09	80.51	12,810.63
Florida 6.5	6.500%	23	453.20	3,001.72	195.16	3,650.08
Nassau	8.625%	5	6,794.00	300.00	25.88	7,119.88
Non Taxable	0.000%	4	5,564.00	50.00	0.00	5,614.00
NY-Monroe	8.000%	1	0.00	18.54	1.48	20.02
Out of scope	0.000%	2	3,373.72	190.00	0.00	3,563.72
Tax Exempt	0.000%	2	25.00	175.00	0.00	200.00
Texas Non Taxable	0.000%	1	150.00	0.00	0.00	150.00
TX-Dallas-3057994	0.000%	2	0.00	100.00	0.00	100.00
TX-Plano-3057994	8.250%	4	8,989.33	282.00	23.27	9,294.60
Report Totals		Count: 79	35,628.79	6,243.77	326.30	42,198.85

FILTER BY [Clear All](#)

Date Selection
Custom

Month/Year
October 2023

ADDITIONAL OPTIONS
 Show Detail

Subtotal by
Tax Group

Go

Place a Check Mark in the ‘Show Detail’ check box if you would like to print the details that make up each summary total.

Reports – Project Management Labor Variance Report

The Project Management Labor Variance Report displays the Estimated Hours vs the JTD Hours along with the variance. If the job has exceeded the estimated hours, the variance will show in red. The default report will combine all hours for all phases and change orders for each job into one number, giving you a summary of the labor status on the job. If you choose to show the detail, each job will show the breakdown for each phase and change order associated with the job. There is also an option to only show jobs that have exceeded estimated hours.

Wednesday, December 6, 202 1/1

Project Management Labor Variance Report

Job #	Job Name	Job Address	Approval Date	Status	Est Hours	JTD Hours	Variance
23-38	Gateway PM Job	3334 Kelley Road	08/17/2023	Accepted	0.00	31.78	-31.78
23-39	job 123	11928 Fairway Lakes Dr	08/17/2023	Accepted	0.00	24.00	-24.00
23-40	GPM Job	11928 Fairway Lakes Dr	08/17/2023	Accepted	4.00	87.57	-83.57
23-41	@0 RTU Contorlis including pump set	4500 Custer Rd #33	08/16/2023	Accepted	221.00	2.00	219.00
23-42	Change RTU	3441 Colonial Blvd	08/18/2023	Accepted	50.00	10.00	40.00
23-43	Papa Johns Job	3400 Custer Rd #200	08/30/2023	Pending	43.00	0.00	43.00
23-44	KNA 3 ton	459 Watertown St	09/11/2023	Accepted	60.00	4.15	55.85
23-45	Replacement Tinsley	1823 Winkler Ave	09/28/2023	Accepted	4.00	5.72	-1.72
23-47	Kelly Retrofit	5554-3 Malt Drive	10/12/2023	Accepted	24.00	3.00	21.00
23-48	DOT Lee County HVAC & Plbg	5650 Enterprise Pkwy	10/01/2023	Accepted	1,121.00	160.10	960.90
23-49	Wilson replacement System	1898 Winkler Ave	12/04/2023	Accepted	16.00	15.34	0.66
Report Totals Count: 11					1,543.00	343.66	1,199.34

* - Includes Direct Charge Labor

Wednesday, December 6, 202 1/1

Project Management Labor Variance Report

Job #	Job Name	Job Address	Approval Date	Status	Est Hours	JTD Hours	Variance
		Phase / Change Order Description	Phase or C/O	Phase C/O Status			
23-48	DOT Lee County HVAC & Plbg	5650 Enterprise Pkwy	10/01/2023	Accepted			
		HVAC	Base	InProgress	500.00	138.47	361.53
		Plumbing	Base	Pending	520.00	0.00	520.00
		Shop Fabrication	Base	InProgress	85.00	4.50	80.50
		Cut through wall	Change Order	InProgress	16.00	17.13	-1.13
Subtotal					1,121.00	160.10	960.90
Report Totals Count: 1					1,121.00	160.10	960.90

* - Includes Direct Charge Labor

Wednesday, December 6, 202 1/1

Project Management Labor Variance Report

Job #	Job Name	Job Address	Approval Date	Status	Est Hours	JTD Hours	Variance
23-1	Job Test	11928 Fairway Lakes Dr	01/31/2023	Accepted	2.00	27.00	-25.00
23-14	Wilson Job	512 Oak Rd	03/30/2023	Accepted	8.00	416.20	-408.20
23-2	Test	11928 Fairway Lakes Dr	02/01/2023	Accepted	2.00	303.00	-301.00
23-36	Gym Job	3400 Custer Rd Unit 2323	07/03/2023	Accepted	0.00	83.60	-83.60
23-38	Gateway PM Job	3334 Kelley Road	08/17/2023	Accepted	0.00	31.78	-31.78
23-39	job 123	11928 Fairway Lakes Dr	08/17/2023	Accepted	0.00	24.00	-24.00
23-40	GPM Job	11928 Fairway Lakes Dr	08/17/2023	Accepted	4.00	87.57	-83.57
23-45	Replacement Tinsley	1823 Winkler Ave	09/28/2023	Accepted	4.00	5.72	-1.72
Report Totals Count: 8					20.00	978.87	-958.87

Reports – Project Management Prevailing Wage Hours Report

The Prevailing Wage Hours Report will list all Prevailing Wage hours worked on Project Management Jobs for the week based on the payroll ending date selected. The report will be broken out by each qualifying job and will include the employee name, number of withholding exemptions, work classification, type of pay (Standard or Overtime), the number of prevailing wage standard and overtime hours worked each day, the total standard and overtime hours worked, the rate of pay and the prevailing wage gross amount earned. The system will automatically generate the payroll number based on how many prior pay periods have prevailing wage for the job, but there is an option to not print the week number if applicable.

Wednesday, December 6, 202		Prevailing Wage Hours Report							1/1					
Job Number: 23-48			Job Name: DOT Lee County HVAC & Plbg											
Billing: Lee County DOT			Site: Lee County DOT											
1845 Metro Pkwy			5650 Enterprise Pkwy											
Fort Myers, FL 33902			Fort Myers, FL 33905											
Payroll #: 1		For week ending: 10/08/2023		GC Job #: LCG202310432										
Employee Name	No of Withholding Exemptions	Work Classification	OT or ST	Day and Date							Total Hours	Rate of Pay		Prevailing Gross Amount Earned
				Mon 02	Tue 03	Wed 04	Thu 05	Fri 06	Sat 07	Sun 08		Hours Worked Each Day		
Joe S Patterson - 8771	0	HVAC	o									\$105.00		\$280.00
			s	4.00							4.00	\$70.00	\$0.00	
Joe S Patterson - 8771	0	Carpentry	o									\$105.00		\$93.10
			s		1.33						1.33	\$70.00	\$0.00	
Jared - 5571	2	Carpentry	o									\$76.50		\$276.42
			s	5.42							5.42	\$51.00	\$0.00	
Chuck Tuttle - 4434	4	HVAC	o	0.32		1.25			6.58		8.15	\$76.75		\$2534.40
			s	8.00	2.55	8.00	8.00	8.00			34.55	\$43.00	\$12.25	
Dennis Jordan - 8925	2	HVAC	o									\$76.75		\$442.00
			s		8.00						8.00	\$43.00	\$12.25	
Shea Allan - 8005	2	HVAC	o									\$63.85		\$699.75
			s	8.00	7.00						15.00	\$34.40	\$12.25	
Matt W -	0	HVAC	o									\$76.75		\$110.50
			s	2.00							2.00	\$43.00	\$12.25	
Totals			o	0.32	0.00	1.25	0.00	0.00	6.58	0.00	8.15	\$4436.17		
			s	27.42	18.88	8.00	0.00	8.00	0.00	0.00	70.30			

ServiceFactor Mobile – Each Work Approval will now be Saved as a separate PDF

Each time a new Work Approval is signed and saved, the system will create a PDF of the Approval and upload the PDF to the Work Order. This will allow you to have records of each approval as opposed to just having a final approval signature. For example, if you are performing a diagnostic and you need to replace a part in order to continue the diagnostic, you can have the customer sign the approval for the first part. If you after replacing the part, you need to install an additional part, you can capture a second signature approving both parts. You can continue this for as many approvals as necessary. When the invoice is generated, it will list all of the items along with the approval signature as it always has.

The Proposed Work Approval PDF has been redesigned so that it is an actual Proposed Work Approval as opposed to being an Invoice.

The screenshot displays the ServiceFactor Mobile interface. At the top, there are navigation tabs for Timeline, Timesheet, Invoice, Payments, Quote, and Purchase Order. The Timeline tab is active, showing a list of events for 12/06/2023. A callout box with a blue border and text states: "Each approval will be automatically attached to the Work Order Timeline and a timeline entry will be created for each approval". A red arrow points from this callout to a timeline entry: "Approval signed for A-7555" at 09:28 AM, which is highlighted with a red box. Another red arrow points from the callout to the Attachments(3) section on the right, which is also highlighted with a red box. The Attachments section shows three items: "Invoice_A-7555_22939_Invoice_print", "Approval_A-7555_22939_Approval_print", and "Approval_A-7555_22939_Approval_print".

Event	Time
Approval signed for A-7555	09:28 AM
Workorder WO-8601 status was changed to Completed	09:29 AM
Invoice A-7555	09:29 AM
Invoice was sent	09:29 AM

Attachment	Time
Approval_A-7555_22939_Approval_print	12/06/2023 09:28 AM
Approval_A-7555_22939_Approval_print	12/06/2023 09:27 AM
Invoice_A-7555_22939_Invoice_print	12/06/2023 09:29 AM



AA Service

11928 Fairway Lakes Drive
Fort Myers, FL 33013
(817) 881-3949
sales@teamservice.com
FL12345

Proposed Work Approval

Date: **12/06/2023**
Work Order No. **WO-8601**

Bill To Address
Bill Henderson 11810 Rosemount Dr Fort Myers, FL 33913

Site Address
Bill Henderson 11810 Rosemount Dr Fort Myers, FL 33913

Description	Qty	Price (\$)	Amount (\$)	Approved
Equipment ID: AC001 - Trane - M/N: 4TTR6036J - S/N: XV338346343 - Side of house				
Generic Capacitor	1.00	55.27	55.27	<input checked="" type="checkbox"/>
Condenser Motor - 1/3 to 1/6 HP 208-230/1/60 (1075 rpm/1 speed)	1.00	214.63	214.63	<input checked="" type="checkbox"/>

	Sub Total	\$269.90
As a Value Club Member, you saved \$47.63 today. Thank you for being a Value Club Member.	Tax (6.5000 %)	\$3.59
	Total	\$273.49

Message

Authorization

I have the authority to order the above work and do so order as outlined above. It is agreed that the seller will retain title to any equipment or material furnished until final & complete payment is made. And if a settlement is not made as agreed, the seller shall have the right to remove the same and the seller will be held harmless for any damages resulting from the removal thereof.

Signature

Thank You For Your Business!

ServiceFactor Mobile – You can now drop a ‘Pin’ at an equipment location

You can now drop a ‘Location Pin’ on a piece of equipment. You can then click on the Pin at a later time to open the map and get directions to the piece of equipment. This feature is good for commercial accounts and plants that might have dozens of pieces of equipment spread throughout the property. To ‘pin’ a piece of equipment, tap the location pin while in the Edit Mode of the equipment. To find the location, tap the location pin while viewing the piece of equipment.

NOTE – This feature will require you to allow ServiceFactor to use your location while using the App. Be sure to let your technician’s know that they will need to accept the option “Allow while Using App”

