

SF Release Notes: January 31, 2024

Invoice Screen – Location Field added to the Item Search

A new “Location” field has been added to the Item Search on the Invoice Screen. This will allow you to add items to an invoice from a different location without automatically adding the item to the Lead Technician’s inventory list.

IMPORTANT NOTE – By default, the Location will be the Default Technician’s inventory location. When searching for inventory items, if the inventory item is not part of the technician’s inventory, it will not be listed if the Location is set to the technician’s truck. You will need to change the location to “Main” in order to search for all items. Any item types other than Inventory (Non Inventory, Service, Sub Totals, Flat Rate, etc.) will still be displayed in the search listing, even if the technician’s warehouse is selected.

The screenshot displays the 'Invoice' screen in the SF software. The top navigation bar includes 'Work Order Details', 'Timeline', 'Timesheet', 'Invoice', 'Payments', 'Quote', and 'Purchase Order'. The 'Invoice' section shows a 'REVIEWED' status and various options like 'Email', 'Print', 'Change Status', and 'Save'. Below this, there are several toggle switches for 'Allow To Pay Bill Online', 'Hide from Customer Portal', 'Print Equipment', 'Hide Prices', and 'Print Savings'. A 'Work Order History Summary' section is also visible. The main area is the 'Invoice Items' table, which has columns for Location, Item, Description, Qty, Rate (\$), Amount (\$), Tax, Equipment, Class, and Print. Two items are listed: 'MOT002' (1/4 hp 1075 RPM 230V Cond Mtr) and 'PVC001' (1/2" Schd 40 PVC Pipe). The 'Item Location' field for the second item is highlighted with a red box and labeled 'Truck 100'. A blue callout box with an arrow points to this field, containing the text: 'Inventory Location has been added to the Item Search on the Invoice'. At the bottom right, there are fields for 'Discount %' (0.00) and 'Taxable Subtotal' (\$161.14).

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
Truck 100	MOT002	1/4 hp 1075 RPM 230V Cond Mtr	1.00	160.00	160.00	YES	Search and select	Residential:Service	YES
Truck 100	PVC001	1/2" Schd 40 PVC Pipe	.00	1.14	1.14	YES	Search and select	Residential:Maintenance	YES

Item Location: Truck 100

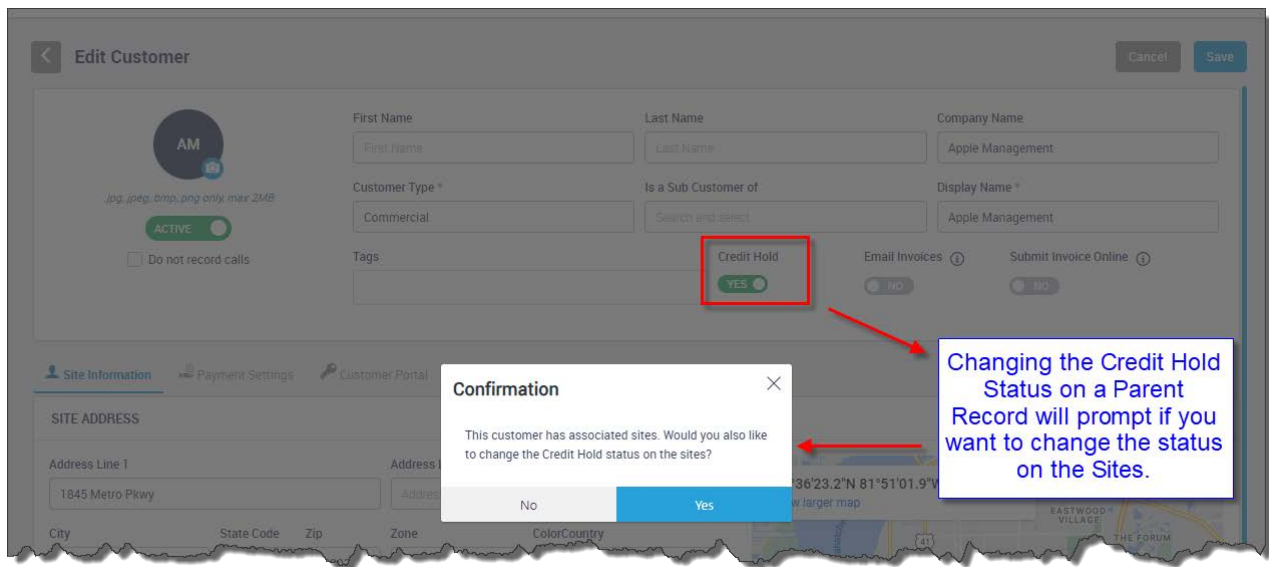
Subtotal: \$161.14

Discount %: 0.00

Taxable Subtotal: \$161.14

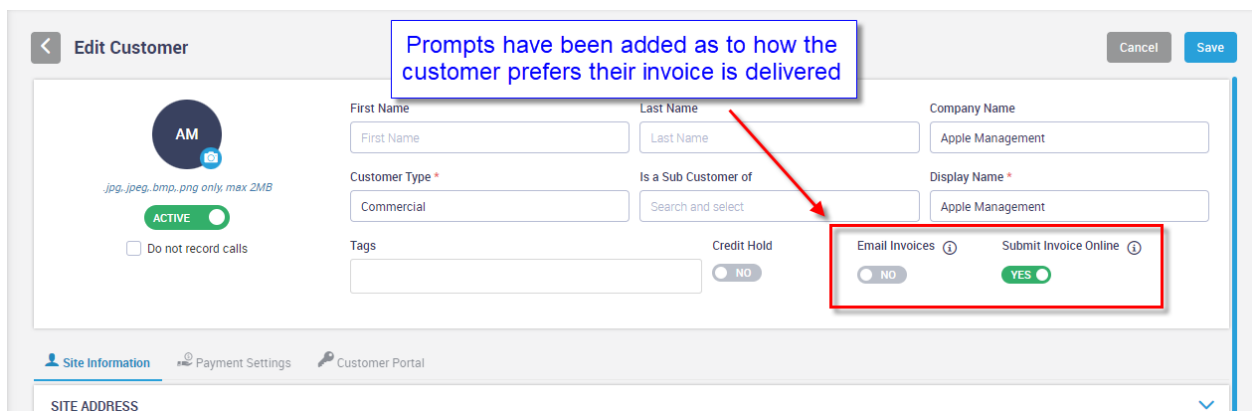
Customer File – Credit Hold has been enhanced

The last update introduced a new Credit Hold flag to the Customer File. This update has enhanced the Credit Hold option to ask if you want to change the Credit Hold status for any associated sites. For example, if you change the Credit Hold status for a customer with Sub Customers, you will be prompted that the customer has associated sites and ask if you would like to change the Credit Hold status on the Sites. Any sites affected will have a timeline entry created indicating the Date, Time and the User that changed the Credit Hold status.



Customer File – New prompts have been added indicating if Invoices should be emailed or submitted online

New prompts have been added to the Customer File to indicate if invoices should be emailed or submitted online. If the prompts are set to 'Yes', a reminder will be displayed on the Invoice Screen indicating the preferred method of invoice delivery.



The screenshot shows the 'Invoice' screen with various fields and buttons. A red box highlights the 'Bill online' button. A blue callout box contains the text: "Invoice screen will show if the prompt has been set to Bill online, or email invoice".

Service Agreements – Ability to include the ‘Agreement Note’ on the Inspection Slip has been added

The option to include the Agreement Note from the first screen of the Service Agreement has been added. In order to print the Agreement Note, you will need to set the “Include SA note on insp WO?” flag to Yes. The Agreement Note will be included in the “Problem Reported” section of the Inspection Work Order.

The screenshot shows the 'Edit Agreement - Shuck, Gerry' screen. The 'Include SA note on insp WO?' flag is set to 'YES' and is highlighted with a red box. A blue callout box contains the text: "Set the 'Include SA note on insp WO' flag to 'Yes' if you want the Agreement Note to be included on the Inspection Work Order".

Service Agreements – Inspection Note Codes have been added to the Settings

The last update introduced the ability to add 'Inspection Notes' to individual inspections that will print on the Inspection Work Order when generated. This update we have enhanced the Inspection Notes by adding the ability to set up Inspection Note Codes in the settings, allowing you to select pre-defined notes, as opposed to having to manually type each note.

The screenshot shows a form titled "Edit Inspection Note Code" with a close button (X) in the top right corner. It contains the following fields:

- Inspection Note Code***: A text input field containing "Humidifier".
- Active**: A checked checkbox.
- Description**: A text area containing "Humidifier Inspection and changing the pad is included".
- Save**: A blue button at the bottom right.

This screenshot shows the "View Agreement" page for "Shuck, Gerry" with a "Notes" modal window open. The modal has a dropdown menu for "Inspection Note Codes" with options: "-- Select --", "-- Select --", "Fall", and "Humidifier" (highlighted). Below the dropdown is a text area for notes. In the background, a table of inspection records is visible. Two "Insp Notes" labels in the table are highlighted with red boxes, and red arrows point from a text box to them.

Adding Inspection Notes will now allow you to select pre-defined inspection notes, as well as manually enter inspection notes

This screenshot shows the "Notes" modal with the "Inspection Note Codes" dropdown menu set to "Humidifier". The text area below contains the note: "Humidifier Inspection and changing the pad is included". An "Okay" button is located at the bottom right.

Service Agreements – A Terms field has been added to the Agreement Type file

A new payment terms field has been added to the Agreement Type file. If you enter a Term in the field, it will override the customer's default terms when adding a new service agreement. This feature is designed for companies that have a different term for their agreement invoices than the customer's default term. NOTE – The terms can always be overridden on the Service Agreement if necessary.

Update Agreement Type [Cancel] [Save]

General

Agreement Type Name * Code* Active

Problem Code* Items * Price(\$)

Class Renewal Commission (\$) Sales Commission (\$)

Terms Renewal Commission (%) Sales Commission (%)

Agreement Description

After Hours Schedule

Start Time End Time

Pricing Section

Use Default Pricing Rule

Discount(%)

Callout Box: A Terms field has been added to that Service Agreement Type file. The Terms in the Agreement Type will override the Customer's default terms when adding a new Service Agreement, but can be overridden if necessary.

Add New Agreement - Laura, Mendez [Cancel] [Save]

Laura Mendez
408 Windhaven Tr, Mchenry, Illinois, 600505924
(239) 555-5677

General | Billing Schedule | Maintenance Schedule

Agreement Plan * Active

Items Problem Code * Class

Reference Id **Terms** Tags

Agreement Period

Recurring Auto Renewal Renewal Reminder

Original Start Date * Contract Start Date * Expiration Date *

Callout Box: Terms will be filled in based on the Terms assigned to the Agreement Type if applicable. Leave the Terms Field Blank if you want it to default to the Customer's Terms.

Inventory – Updating Inventory Counts can be done from the Item Listing Screen

A new feature has been added to the Inventory Listing screen that will allow you to quickly update the Inventory Counts without having to drill down into the actual item. To access the Inventory Count screen, simply click on the Qty field. If you need to adjust the counts, click the ‘Edit Quantity’ button and make your adjustments. NOTE – Editing the quantity will create an entry to your Inventory Shrinkage account in QuickBooks. This feature can be used for reconciling inventory counts.

Items (694)

Cost Utility Update Utility QB Sync Print Export

All Items **Inventory** Non Inventory Assembly Flat Rate Service Items

Toggle + Add Search by Name

Name	Sales Description	Category	Price	Item Type	Qty Available	Reorder Point	On Order	Status	Actions
TSTAT010	7 Day programmable Honeywell Thermostat		\$ 325.00	Inventory	0.00		6.00	Active	View
PVC001	1/2" Schd 40 PVC Pipe			Inventory	6.00		0.00	Active	View
NCT017	4TWR4030 2.5TXR14			Inventory	-2.00		0.00	Active	View
FLT111	20" X 25" Filter Media		\$ 127.38	Inventory	3.00		11.00	Active	View

Click the 'Qty Available' link in the Item Listing screen to open the adjustment screen

Inventory Distribution - TSTAT010

Location	Qty Available	Qty Committed	Reorder Point	Optimal Quantity	Bin Location	On Order	PO Committed	Receiving Committed
Main	5.00	1.00	0.00	0.00		1.00	0.00	0.00
Truck 104	-3.00	2.00	0.00	0.00		0.00	0.00	0.00
Truck 100	-2.00	1.00	0.00	0.00		5.00	0.00	0.00

Total Quantity: 0.00

Click the Edit Quantity to make adjustments

Edit Quantity Done

Inventory Distribution - TSTAT010

Location	Qty Available	Qty Committed	Reorder Point	Optimal Quantity	Bin Location	On Order	PO Committed	Receiving Committed
Main	2	1.00	0.00	0.00		1.00	0.00	0.00
Truck 104	0	2.00	0.00	0.00		0.00	0.00	0.00
Truck 100	-2.00	1.00	0.00	0.00		5.00	0.00	0.00

Total Quantity: 0.00

Make appropriate adjustments and click Save

Save

Project Management – Project Manager field added to the Job Info screen

A new 'Project Manager' field has been added to the Job Info screen. This will allow you to record who the Project Manager is for the Job and can be used as a filter when running reports. The Project Manager has also been added to the Advanced Filters in the Job Listing.

NOTE – You define who qualifies as a Project Manager in the Employee file.

The screenshot shows the 'Update Employee' form. On the left, there is a profile section for 'drew@email.com' with a role of 'Tech'. The main form area is titled 'Employee Details' and includes fields for 'Default Class' (Residential-Service), 'Inventory Location' (Truck 100), 'Review Link', 'Review Text' (Google Reviews), and 'Weather Location' (Fort myers). At the bottom of the form, there are several toggle switches: 'Sales Person' (YES), 'Project Manager' (YES), 'View Profitability' (YES), and 'LeaderBoard' (YES). A red box highlights the 'Project Manager' toggle, and a red arrow points to it from a blue callout box that says 'Define Project Managers in the Employee File'. There is also a 'Reset Password' button at the bottom left.

The screenshot shows the 'Job Info' screen for a job titled 'Replace RTU's'. The job is 'Accepted' and has a 'Job Name' of 'Replace RTU's'. The 'Sales Rep' is 'Drew'. The 'Project Manager' field is highlighted with a red box and labeled 'Drew'. A blue callout box says 'Select the Project Manager on the Job Info Screen' with a red arrow pointing to the 'Project Manager' field. The screen also displays various financial details, including 'Contract Amount' (\$25,000.00), 'Billed To Date' (\$6,500.00), and 'Variance' (\$18,500.00). The 'Estimate' table shows 'Subs' with an 'Estimated Cost' of \$4,500.00, 'Markup(%)' of 0.00, and 'Markup(\$)' of \$0.00. The 'Contract' table shows 'Base Contract' of \$25,000.00 and 'Change Orders' of \$0.00.

Project Management – You can now adjust the Estimated Costs after the Job has been accepted

The ability to adjust the Estimated Costs on a Job after it has been created is now available based on permissions. Permission to change the cost is given in the Employee file and any changes will be recorded to the Timeline and a note will appear at the top of the Job Info screen indicating that the costs have been changed after the job was accepted. The ability to change the costs should only be given to Admins.

The screenshot is divided into three main sections illustrating the process:

- Update Employee:** Shows the 'Employee Details' tab with various permissions. A callout box points to the 'Allow Est. Cost Adjustment after Job Accepted' checkbox, which is checked. Other permissions like 'Project Manager', 'View Profitability', and 'LeaderBoard' are also checked.
- Replace RTU's:** Shows the 'Base Job' tab for Job #: 24-4. A callout box points to the 'Estimated' row in the cost table, which is highlighted with a red box. The table shows estimated costs for Subcontractor, Material, Labor, Hours, Misc., and Total.
- Job Info:** Shows the 'Job Info' tab with a callout box pointing to a yellow notification box that says 'Costs changed after job accepted'.

	Subcontractor	Material	Labor	Hours	Misc.	Total
Estimated	4500.00	12900.00	4500.00	120.00	500.00	\$22,400.00
Committed	\$0.00	\$10,000.00	\$0.00	0.00	\$0.00	\$10,000.00
JTD	\$0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00
Variance	\$4,500.00	\$12,900.00	\$4,500.00	120.00	\$500.00	\$22,400.00

Purchase Orders – Ability to Search by Customer Name has been added

The PO Listing screen will now display the Customer Name if applicable and the ability to search for Purchase Orders by a customer name has been added to the Advanced Filters. NOTE – The regular search will not search by Customer Name. If you want to search by the Customer Name, use the Advanced Filter option to enter a customer name and click the Go button.

NOTE – The filters applied to the Purchase Order listing will now be displayed at the top of the listing.

Purchase Order (1297)

Purchase Order listing will now display the Customer Name if applicable

PO Number	Vendor	Customer Name	Location	PO Type	Expected Delivery Date	PO Date	Price	Billed To Date	Status
PO-1395	Johnstone Supply		Main	Inventory	01/29/2024	01/29/2024	\$750.00	\$0.00	Open
PO-1394	Trane	Burke, Janet	WO-8902	Service	01/26/2024	01/26/2024	\$5,961.95	\$0.00	Open
PO-1393	Trane	Burke, Janet	WO-8899	Service	01/25/2024	01/25/2024	\$300.00	\$300.00	Complete
PO-1392	Johnstone Supply	Jacobs, Kevin	WO-8876	Service	01/24/2024	01/24/2024	\$26.35	\$0.00	Open
PO-1391	Carrier	Burke, Janet	WO-8882	Service	01/23/2024	01/23/2024	\$0.00	\$0.00	Open
PO-1390	Johnstone Supply	Papa Johns-3400	WO-7679	Service	01/23/2024	01/23/2024	\$0.00	\$0.00	Open
PO-1389	Johnstone Supply	Papa Johns-3400	WO-7679	Service	01/23/2024	01/23/2024	\$0.00	\$0.00	Open

Purchase Order (13) Filters Applied: Customer Name: jacobs Clear All

Use the Advanced Filter to search for all Purchase Orders for a specific Customer

PO Number	Vendor	Customer Name	Location	PO Type	Expected Delivery Date	PO Date	Price	Billed To D
PO-1392	Johnstone Supply	Jacobs, Kevin	WO-8876	Service	01/24/2024	01/24/2024	\$26.35	
PO-1330	Trane	Jacobs, Kevin	WO-4934	Service	12/15/2023	12/12/2023	\$1,250.00	
PO-1172	Johnstone Supply	Jacobs, Kevin	WO-7179	Service	03/21/2023	03/21/2023	\$290.00	
PO-945	Davis Crane	Jacobs, Kevin	WO-5925	Service	05/26/2022	05/26/2022	\$5,000.00	
PO-796	Grainger	Jacobs, Kevin	WO-4934	Service	11/25/2021	11/25/2021	\$0.00	
PO-794	Carrier	Jacobs, Kevin	WO-4780	Service	11/17/2021	11/17/2021	\$50.00	
PO-651	Johnstone Supply	Jacobs, Kevin	WO-3056	Service	11/28/2020	11/28/2020	\$19.60	
PO-550	Grainger	Jacobs, Kevin	WO-2131	Service	06/02/2020	06/02/2020	\$63.00	
PO-415	Johnstone Supply	Jacobs, Kevin	WO-1210	Service	01/21/2020	01/21/2020	\$105.4	
PO-367	Johnstone Supply	Jacobs, Kevin	WO-1016	Service	12/27/2019	12/27/2019	\$19.75	
PO-363	AC Moore Supply	Jacobs, Kevin	WO-1016	Service	12/27/2019	12/27/2019	\$10.58	
PO-290	Carrier	Jacobs, Kevin	WO-815	Service	11/25/2019	11/25/2019	\$75.00	
PO-222	Carrier	Jacobs, Kevin	WO-656	Service	10/16/2019	10/16/2019	\$50.00	

SEARCH BY: Clear All

Customer Name: jacobs

GO

Purchase Order (5) Filters Applied: Johnstone Customer Name: jacobs Clear All

Filters applied will now be listed at the top of the PO Listing Screen

PO Number	Vendor	Customer Name	Location	PO Type	Expected Delivery Date	PO Date	Price	Billed To Date	Status
PO-1392	Johnstone Supply	Jacobs, Kevin	WO-8876	Service	01/24/2024	01/24/2024	\$26.35	\$0.00	Open
PO-1172	Johnstone Supply	Jacobs, Kevin	WO-7179	Service	03/21/2023	03/21/2023	\$290.00	\$290.00	Complete
PO-651	Johnstone Supply	Jacobs, Kevin	WO-3056	Service	11/28/2020	11/28/2020	\$19.60	\$0.00	Complete

Purchase Orders – Blank descriptions will now be overridden when saving a PO an additional time

If you leave the Item Description blank when you initially create a Service or Job Purchase Order and fill it in at a later time, the new description will now be updated to the invoice if the description was blank on the invoice. By design, the system automatically carries the description from the PO to the item description on the customer invoice the first time you save the PO. Any subsequent saving of the PO does not override the description, as the description on the invoice can be modified to include additional details of the item, such as history. However, if a PO is created with a blank description, which will be updated at a later time, and the description is still blank on the Invoice when the description is updated on the PO, the description will carry over to the Invoice.

Purchase Order - PO-1396

[Purchase Order](#) [Receiving Slip](#)

[Email](#) [Print](#)

Ordered By: Nate
Created On: 01/30/2024
Last Date Changed: 01/30/2024
Billed to Date: \$0.00

Purchase Order #: PO-1396
PO Date: 01/30/2024
Expected Delivery Date: 01/30/2024
Ship to: Don't Print
Status: Open

PO Type: Service
Location / Job / Work Order: WO-8801 / Smith, David
Phase / Change Order: Search and select
Work Order: Search and select

Preferred Vendor: Johnstone Supply
Email: wmosborn@me.com
Markup: Standard - 110
Class: Residential

Notes: PO Item Description is blank

No Charge: NO
Mark PO as Void: NO
Use Cost from Item File for Markup?: NO

Item	Description	Order Qty	Total Received	Distributed Quantity	Rate	Amount	Unit Sell	Class
PO Material		1.00	0.00	0.00	0.0000	\$0.0000	0.00	Residential

Search and select

Attachments(0)

Invoice Items [Create PO From Invoice](#)

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
PO-1396	PO Material		1.00	0.00	0.00	YES	Search and select	Residential	YES

Item Location: Truck 104
Search and select

Message to be displayed

Subtotal: \$0
Discount %: 0.00
Taxable Subtotal: \$0.00
FL-Lee: 6.2500% 0.00

Description on Invoice is blank, due to PO description being blank

Purchase Order - PO-1396

Purchase Order Receiving Slip

Email Print

Ordered By: Nate
Created On: 01/30/2024
Last Date Changed: 01/30/2024
Billed to Date: \$0.00

Purchase Order #: PO-1396
PO Date: 01/30/2024
Expected Delivery Date: 01/30/2024
Ship to: Don't Print
Status: Open

PO Type: Service
Location / Job / Work Order: WO-8801 / Smtih, David
Phase / Change Order: Search and select
Work Order: Search and select

Preferred Vendor: Johnstone S...
Email:
Markup: Standard - 110
Class: Residential

Notes: **Enter the Description and save the PO**

No Charge: NO
Mark PO as Void: NO
Use Cost from Item File for Markup?: NO

Item	Description	Order Qty	Total Received	Distributed Quantity	Rate	Amount	Unit Sell	Class
PO Material	1/4 HP OEM Motor	1.00	0.00	0.00	58.25	\$58.2500	154.36	Residential
								Total \$58.25

Attachments(0)

Invoice Items Create PO From Invoice

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
PO-1396	PO Material	1/4 HP OEM Motor	1.00	154.36	154.36	YES	Search and select	Residential	YES

Item Location: Truck 104
Calculate Labor

Message to be displayed: **Because the Description was previously blank, the description on the Invoice has been updated from the previously saved PO**

Subtotal	\$154.36
Discount %	0.00
Taxable Subtotal	\$154.36
FL-Lee	6.2500%
Total	\$164.01
Received	\$0.00

Vendor Credit – You can now tie a Vendor Credit back to a Purchase Order

When entering a Vendor Credit, you now have the option to reference the original Purchase Order on which the item(s) were purchased. This will display a message at the top of the PO indicating the reference number, the date and the amount of the credit. In addition to the original PO Number, you can also enter a Credit Note in order to record the reason for the credit.

Update Vendor Credit - Trane Save

Reference # Date Credit Total **Purchase Order #**

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Class
	PO Parts	Core Charge Credit	1.0000	15.0000	15.0000	Residential:Service
						Total \$15.00

Credit Notes

You can now reference the original PO # on Vendor Credits if applicable

Vendor Credit List - Trane Search

Credit listing will now display the PO #

Reference #	Date	Credit Total	Purchase Order #	Credit Notes	Action
CM4938	01/19/2024	145.00	PO-1371		
235532	01/19/2024	15.00	PO-1383	Core Charge	
647733	01/19/2024	5.25	PO-1382	Credit for the shipping	
32112	01/19/2024	15.00	PO-1382	This was for a core rebate	

Showing 1 - 4 of 4

Purchase Order - PO-1383 X

Credit will be noted on the PO

Purchase Order Receiving Slip

Credit Issued - Ref# 235532 01/19/2024 \$15.00

Email Print

Ordered By **TMS Admin** Created On **01/18/2024** Last Date Changed **01/19/2024** Billed to Date **\$0.00**

Purchase Order # PO Date Expected Delivery Date Ship to Status

PO Type Location / Job / Work Order Phase / Change Order Work Order

Preferred Vendor Email Markup Class

Notes

No Charge Mark PO as Void

Quotes – The “Allow to pay bill online” flag has been added to the Create Work Order screen

If you are set up for online bill pay, the ‘Allow to pay bill online’ slider will now be included in the Create Work Order screen from the Quote. Prior to this release, you would have to go to the Invoice Screen and set the slider. NOTE – If you want to always allow the ability to pay quote invoices online, you can default the slider to ‘Yes’ in the Master Settings.

Default the 'Allow to Pay Invoices Online' flag to Yes?

YES

- Work Order Invoices
- Project Management Invoices
- Quote Invoices

You can define the Default Setting in the Master Settings screen

Create Work Order for Quote 893

Problem Code *
Replace Compressor

Priority
Search and Select

Lead Source *
Existing Customer

Allow To Pay Bill Online
 YES

Notes

Allow to pay Bill Online flag has been added to the Create Work Order screen

Unassigned Schedule

Online Bill Pay – The background color of the credit card data entry fields are now white, making it more intuitive that you can enter data

The background color of the CC #, Expiration Date and CVV Code are now white, as opposed to being the same color as the rest of the background. This should help eliminate confusion as to whether you can enter data in the fields.

Burke, Janet
PO Box 1245

Invoice List

Invoice #	Invoice Amt	Due Amount	Payment Amount
<input type="checkbox"/> F-7650	\$530.00	\$530.00	0.00
<input type="checkbox"/> F-7652	\$392.00	\$392.00	0.00
<input type="checkbox"/> F-7657	\$552.00	\$552.00	0.00
<input type="checkbox"/> F-7768	\$335.00	\$335.00	0.00

Invoice Totals: \$1,809.00
Total Due: \$1,809.00
Payment Total: 0.00

Secure Payments Form

Card Info

Card number
.....

Date (MM/YYYY)
MM / YYYY

CVV # (Security Code)

Submit

VISA MASTERCARD AMERICAN EXPRESS

Card Info fields now have a white background, making it more intuitive that you can enter data