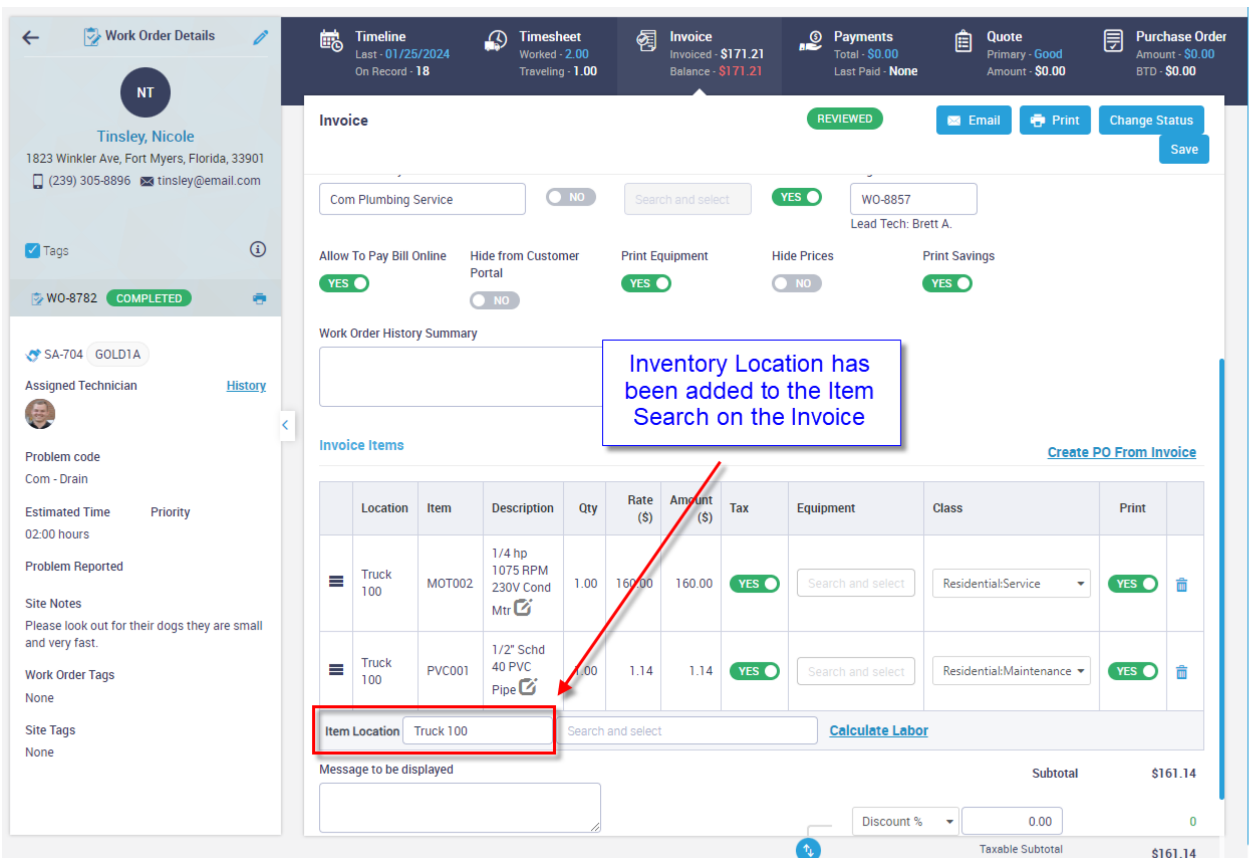
SF Release Notes: January 31, 2024

Invoice Screen – Location Field added to the Item Search

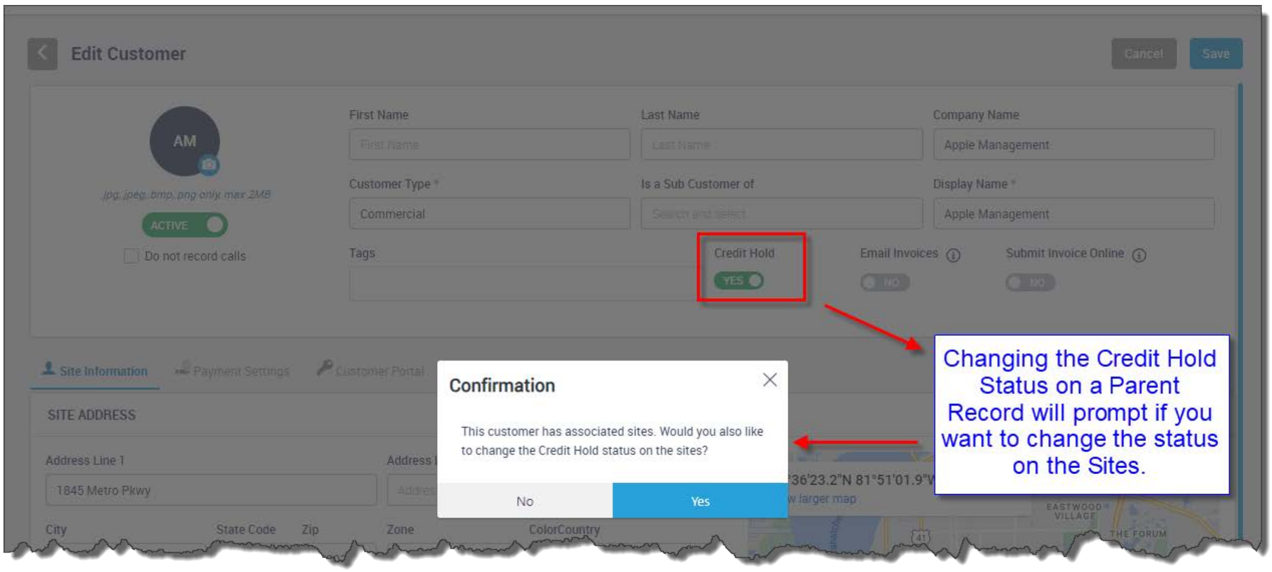
A new “Location” field has been added to the Item Search on the Invoice Screen. This will allow you to add items to an invoice from a different location without automatically adding the item to the Lead Technician’s inventory list.

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.



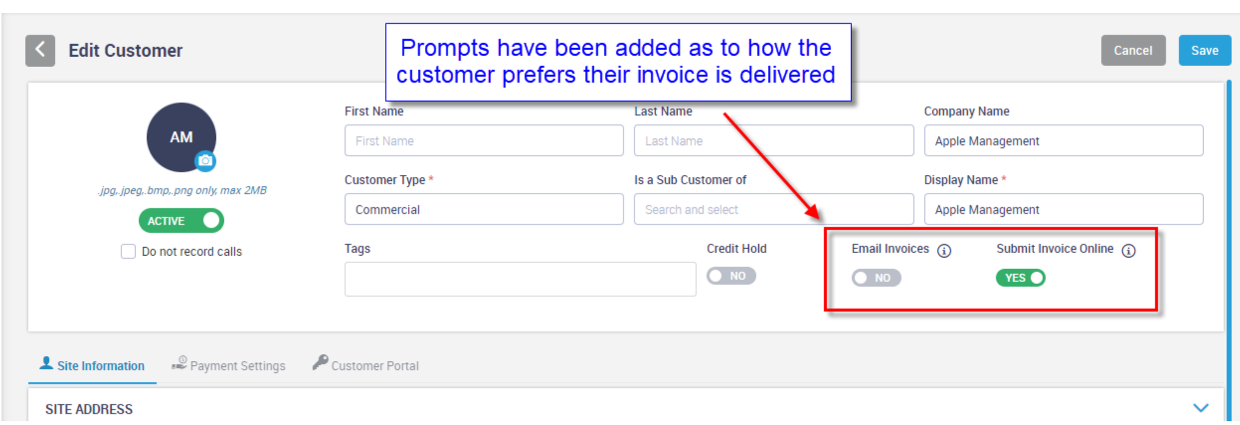
Customer File – Credit Hold has been enhanced

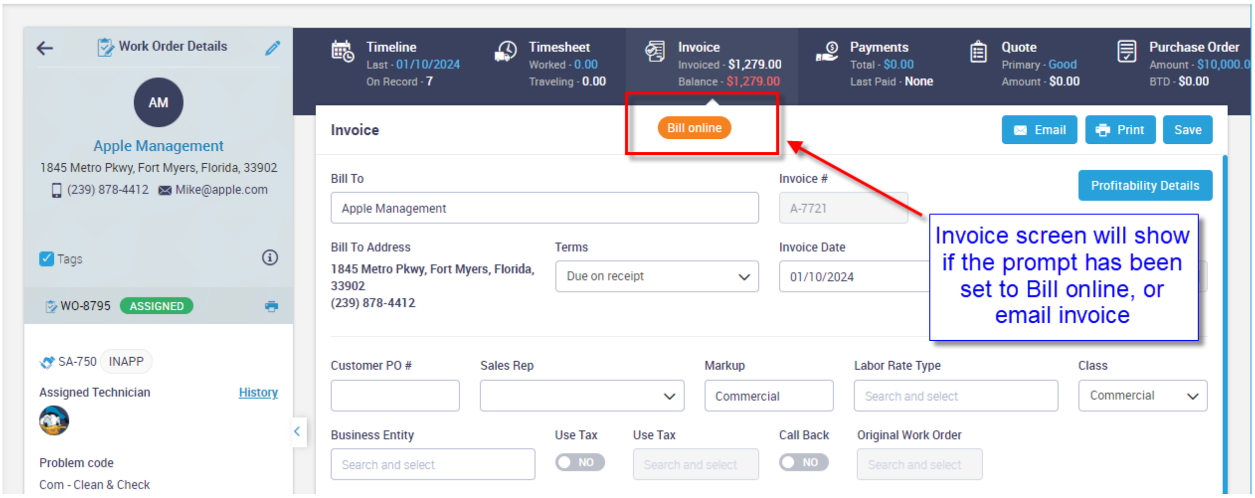
The last update introduced a new Credit Hold flag to the Customer File. This update has enhanced the Credit Hold option to ask if you want to change the Credit Hold status for any associated sites. For example, if you change the Credit Hold status for a customer with Sub Customers, you will be prompted 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

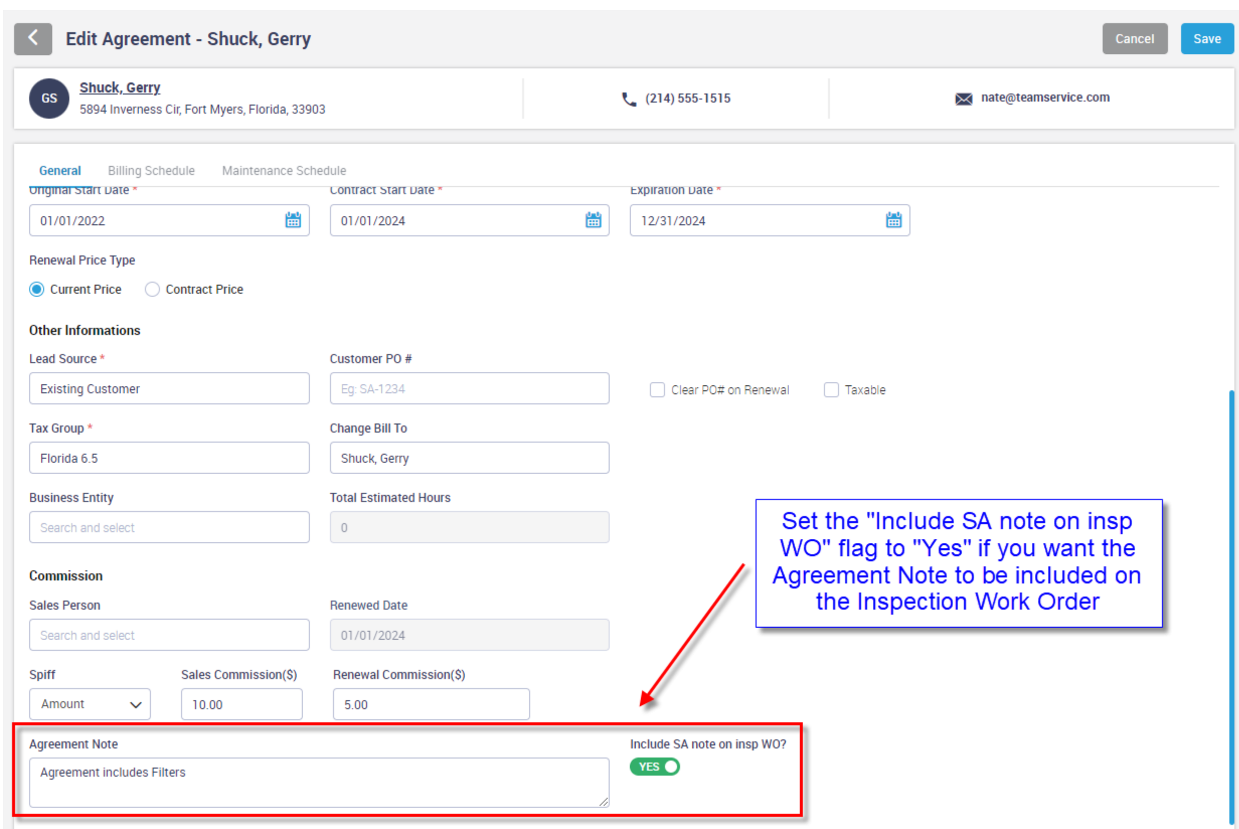
New prompts have been added to the Customer File to indicate if invoices should be emailed or submitted online. If the prompts are set to ‘Yes’, a reminder will be displayed on the Invoice Screen indicating the preferred method of invoice delivery.





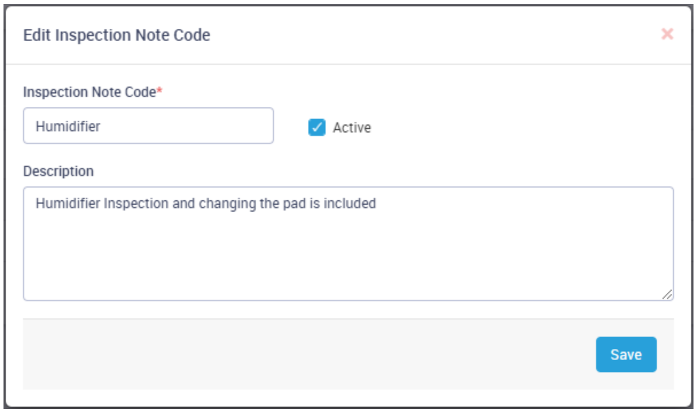
Service Agreements – Ability to include the 'Agreement Note' on the Inspection Slip has been added

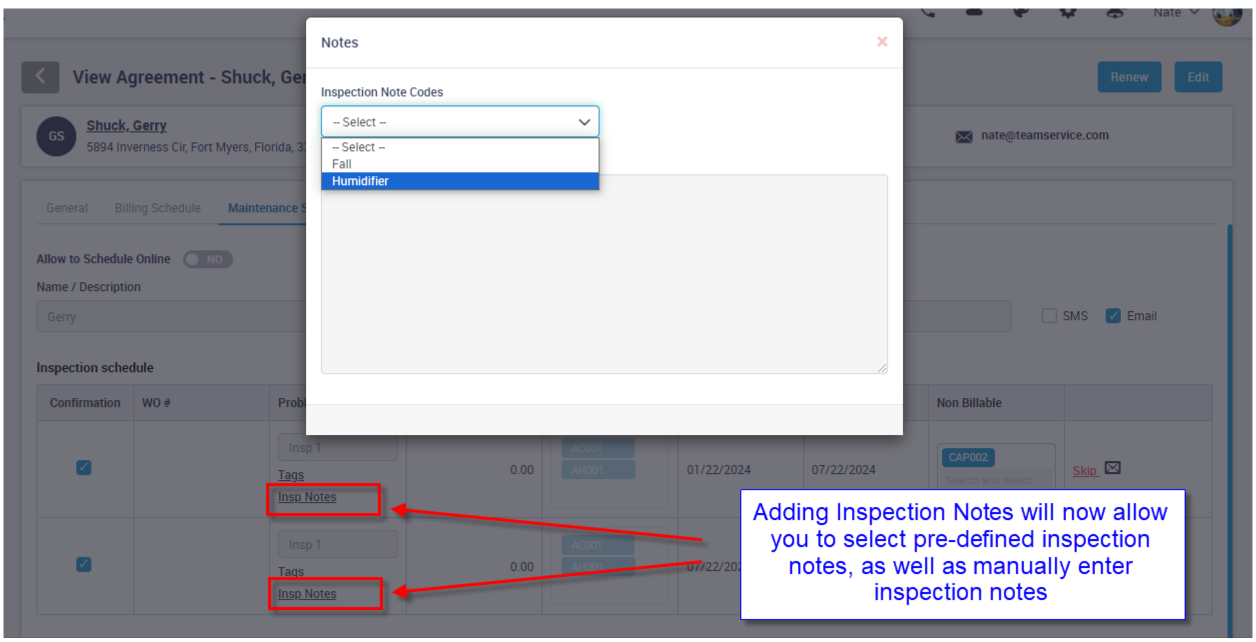
The option to include the Agreement Note from the first screen of the Service Agreement has been added. In order to print the Agreement Note, you will need to set the "Include SA note on insp WO?" flag to Yes. The Agreement Note will be included in the "Problem Reported" section of the Inspection Work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

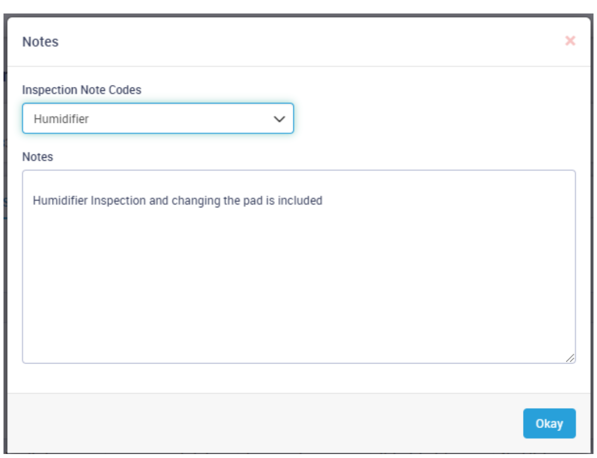


Service Agreements – Inspection Note Codes have been added to the Settings

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.

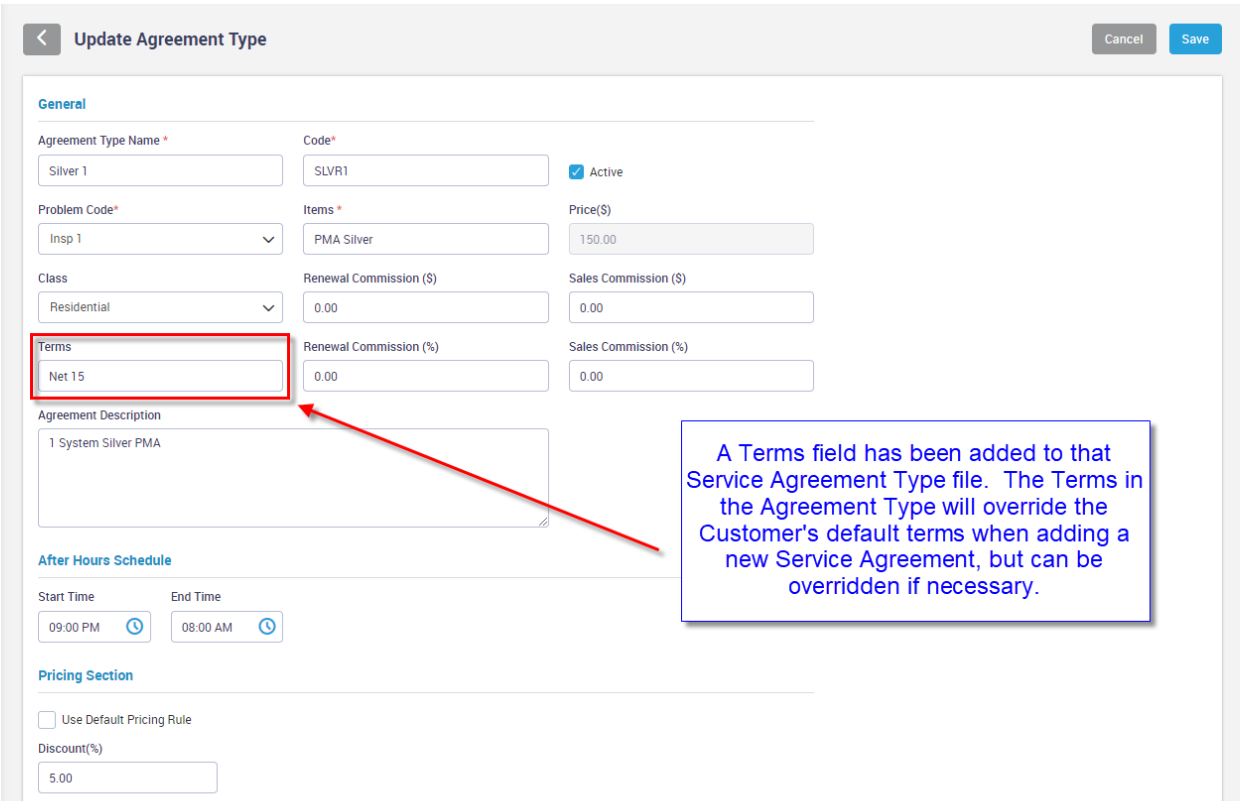


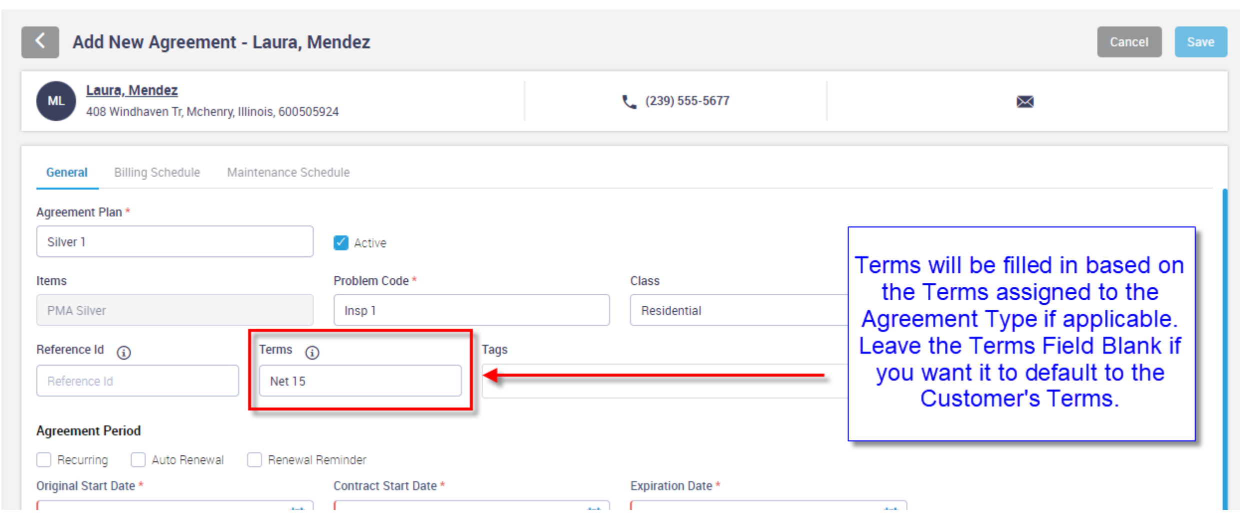




Service Agreements – A Terms field has been added to the Agreement Type file

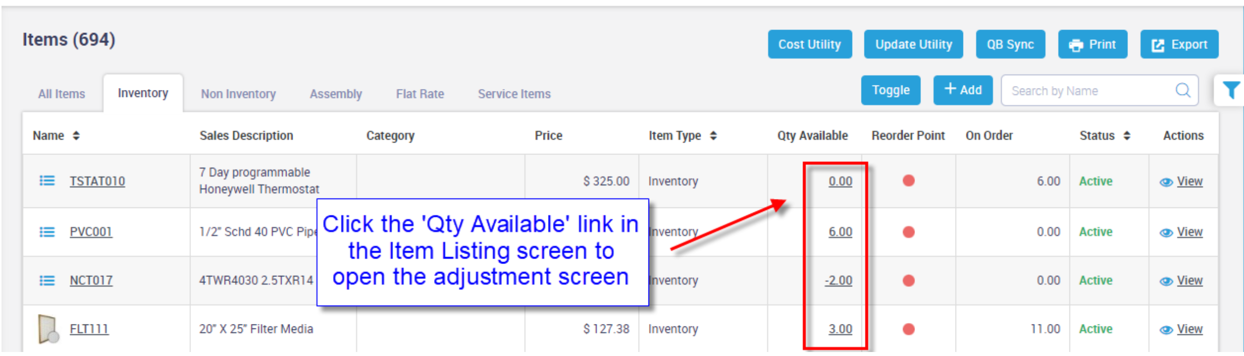
A new payment terms field has been added to the Agreement Type file. If you enter a Term in the field, it will override the customer's default terms when adding a new service agreement. This feature is designed for companies that have a different term for their agreement invoices than the customer's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

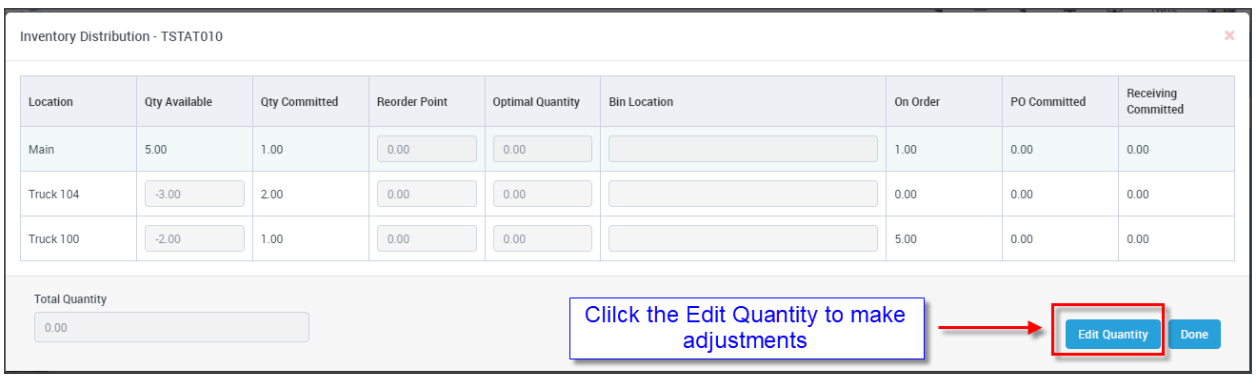


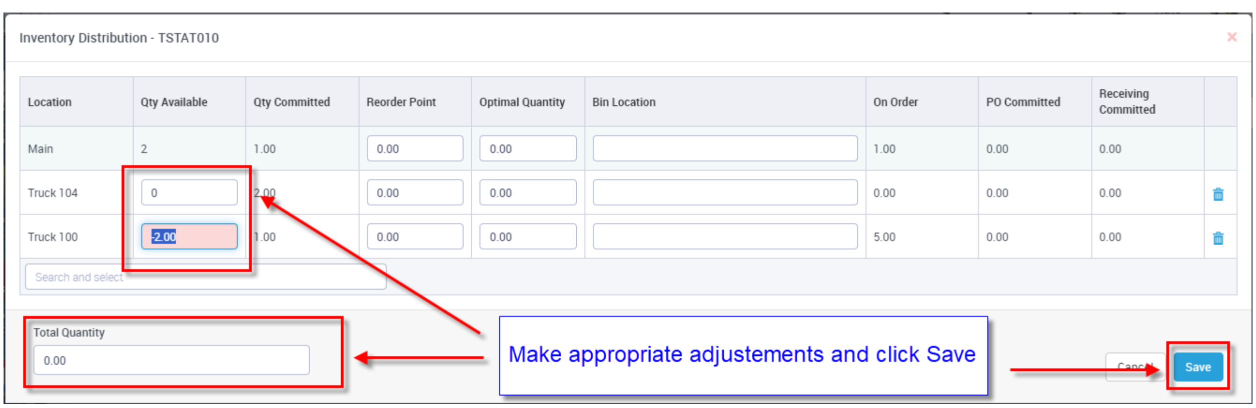


Inventory – Updating Inventory Counts can be done from the Item Listing Screen

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.



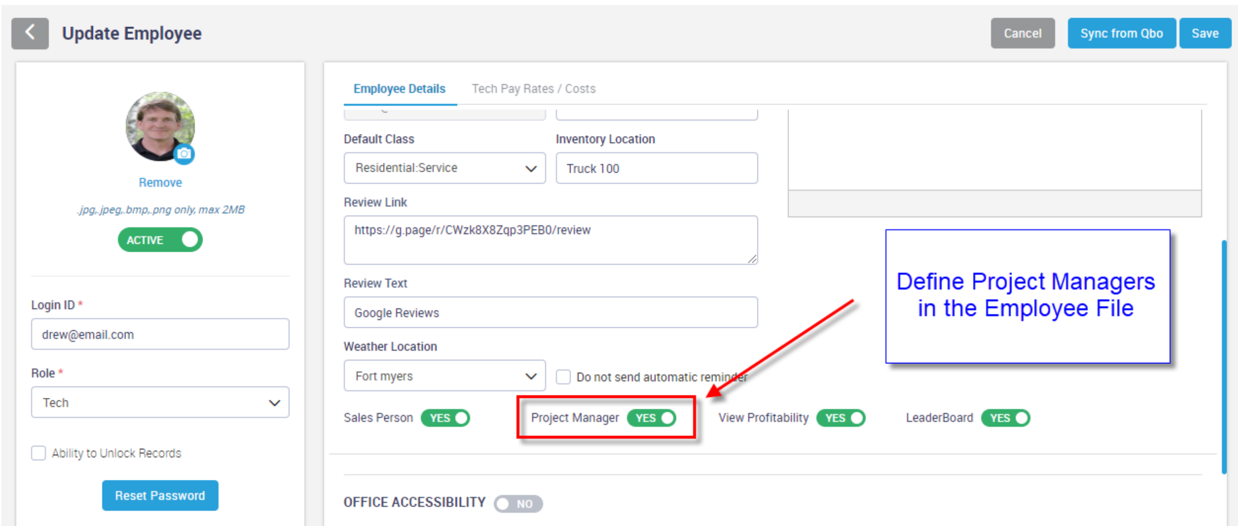


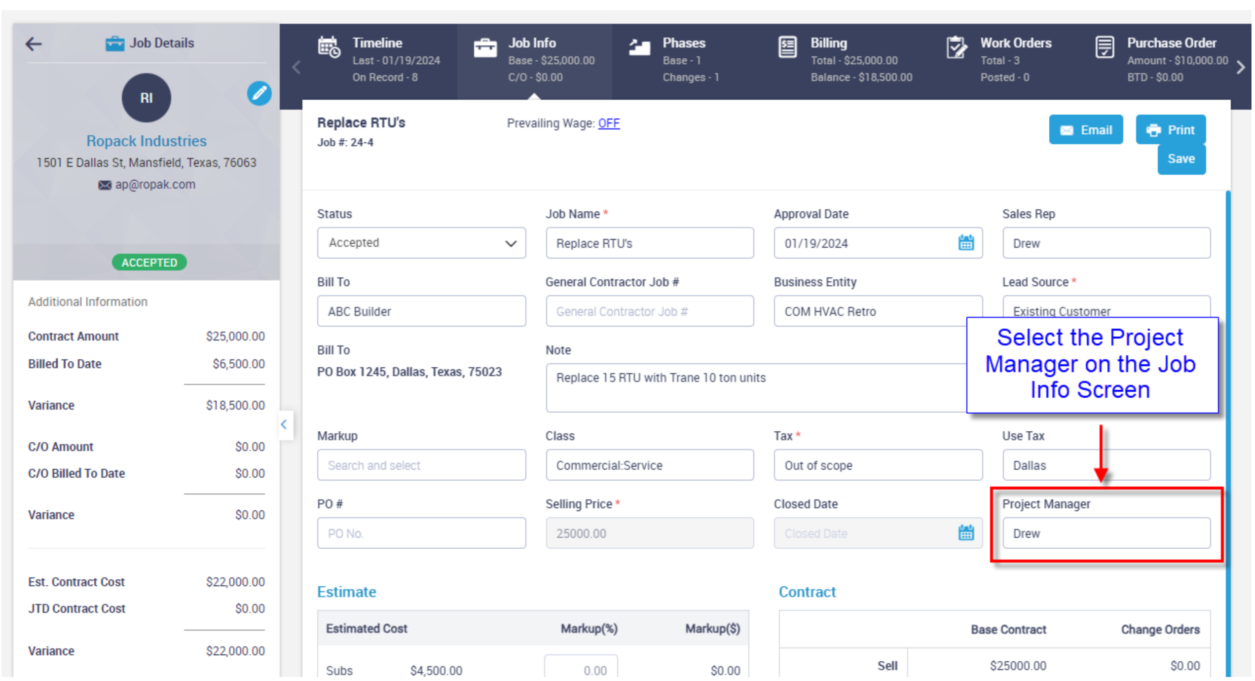


Project Management – Project Manager field added to the Job Info screen

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.

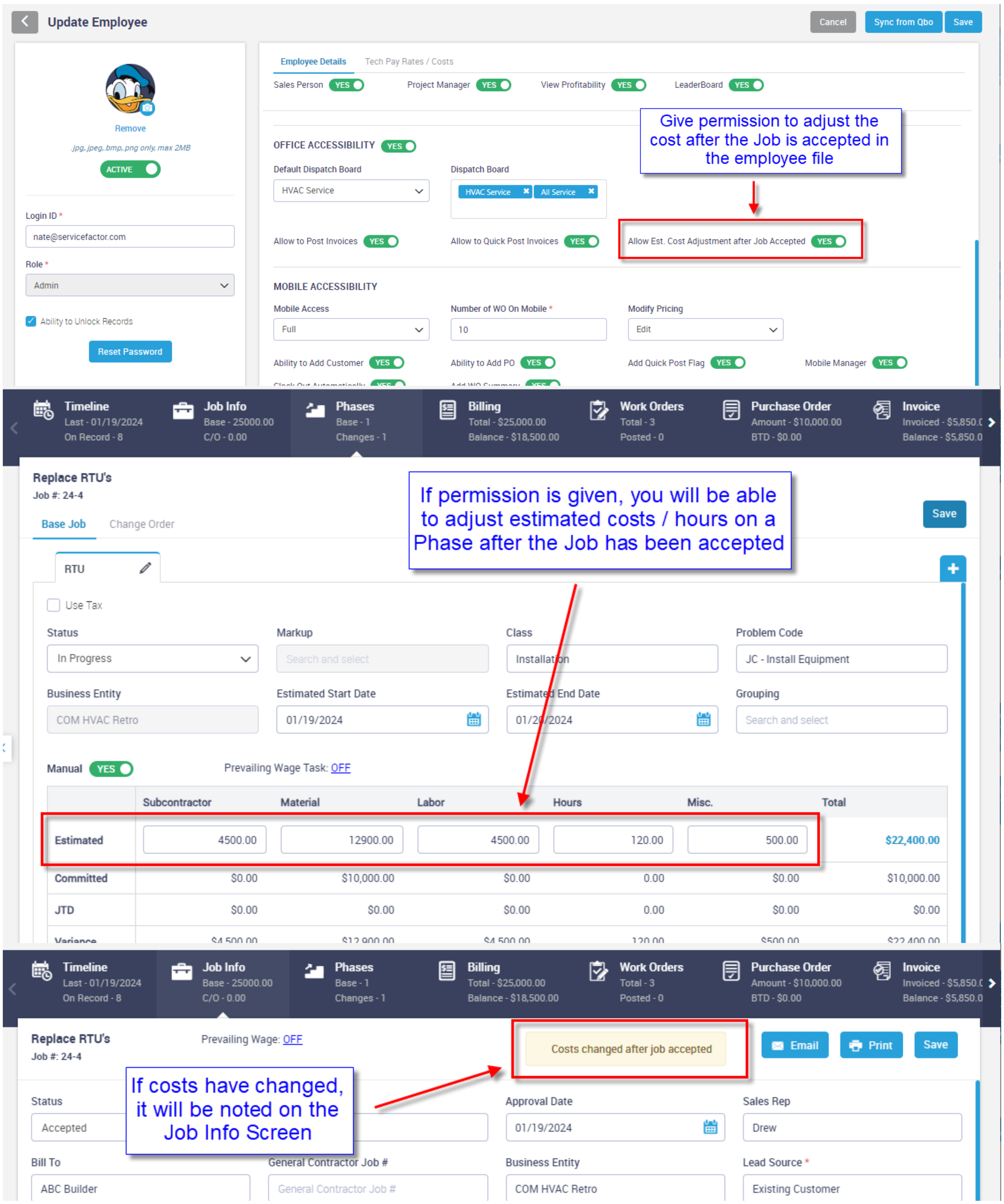
NOTE – You define who qualifies as a Project Manager in the Employee file.





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

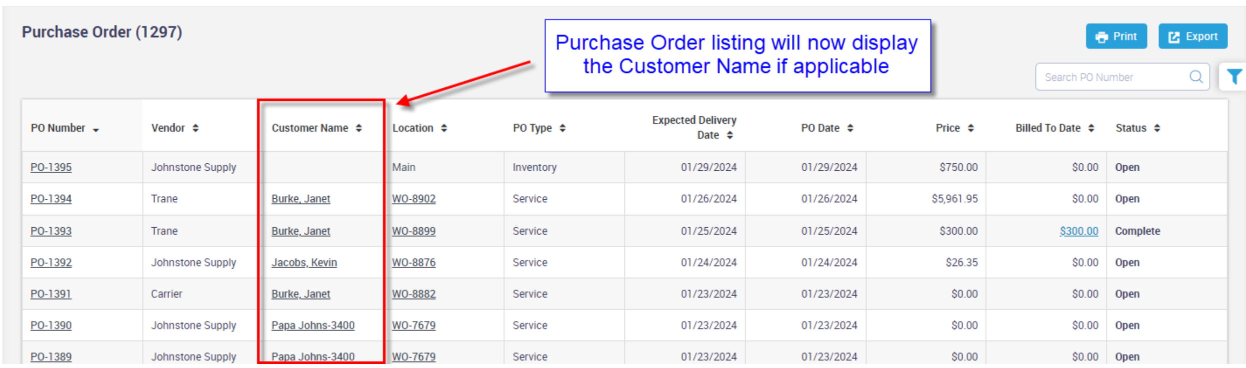
The ability to adjust the Estimated Costs on a Job after it has been created is now available based on permissions. Permission to change the cost is given in the Employee file and any changes will be recorded to the Timeline and a note will appear at the top of the Job Info screen indicating that the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



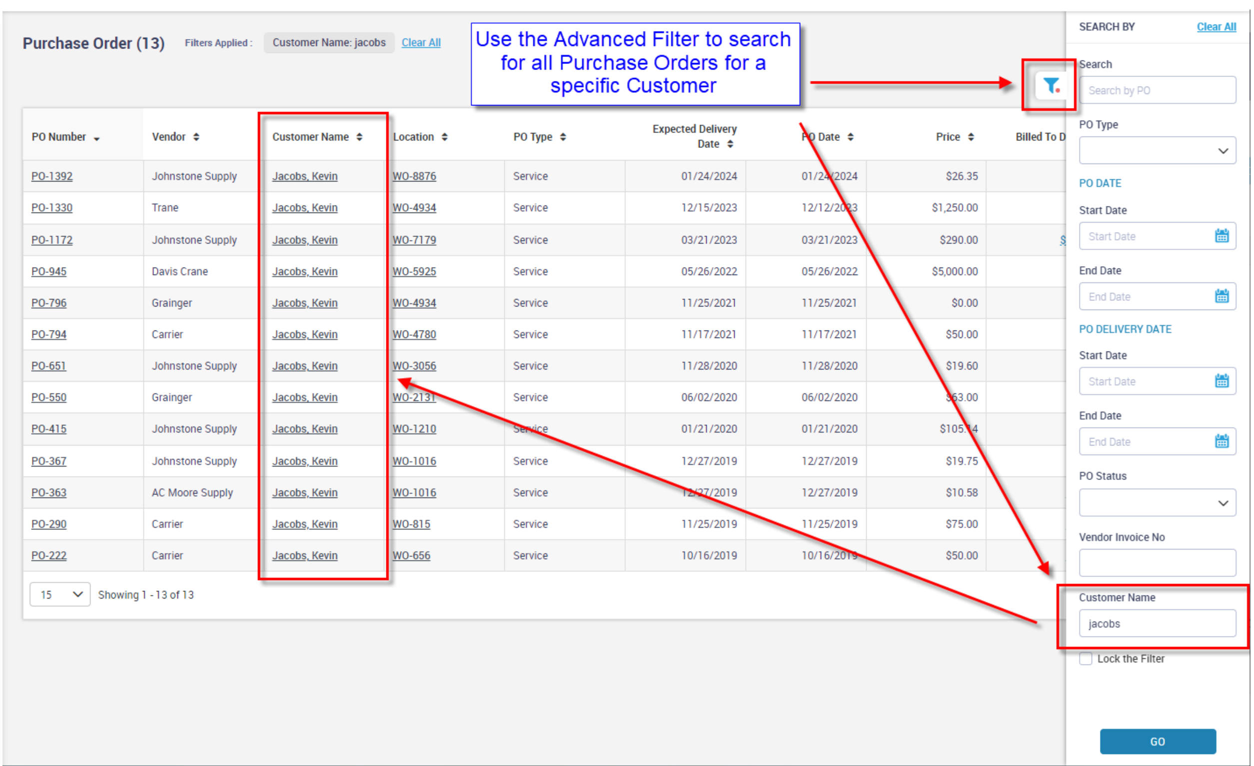
Purchase Orders – Ability to Search by Customer Name has been added

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.

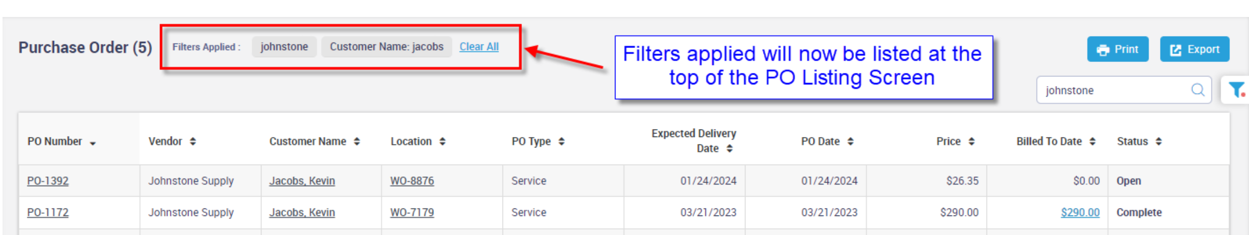
NOTE – The filters applied to the Purchase Order listing will now be displayed at the top of the listing.



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



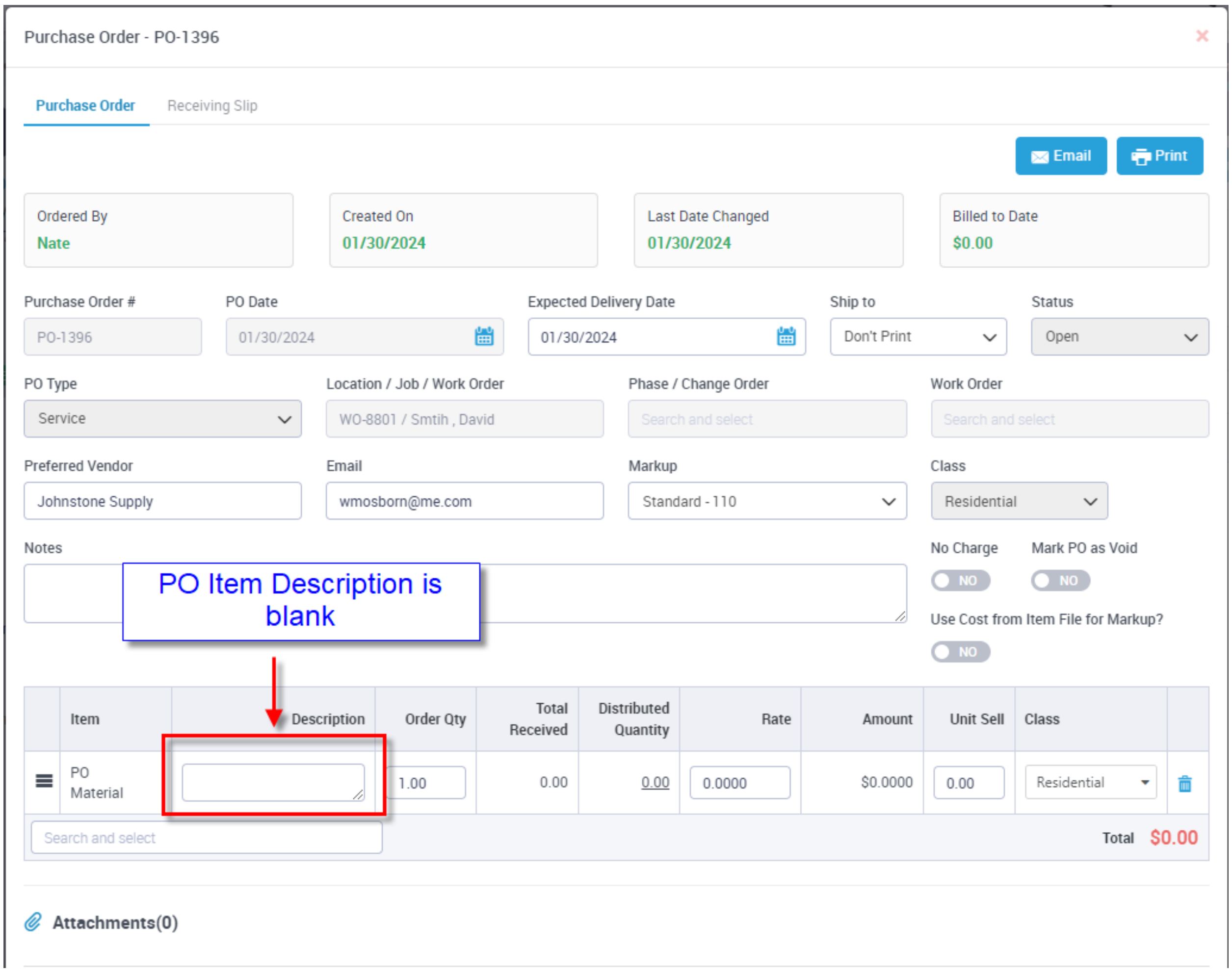
PO Number	Vendor	Customer Name	Location	PO Type	Expected Delivery Date	PO Date	Price
PO-1392	Johnstone Supply	Jacobs, Kevin	WO-8876	Service	01/24/2024	01/24/2024	$26.35
PO-1330	Trane	Jacobs, Kevin	WO-4934	Service	12/15/2023	12/12/2023	$1,250.00
PO-1172	Johnstone Supply	Jacobs, Kevin	WO-7179	Service	03/21/2023	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	$105.14
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

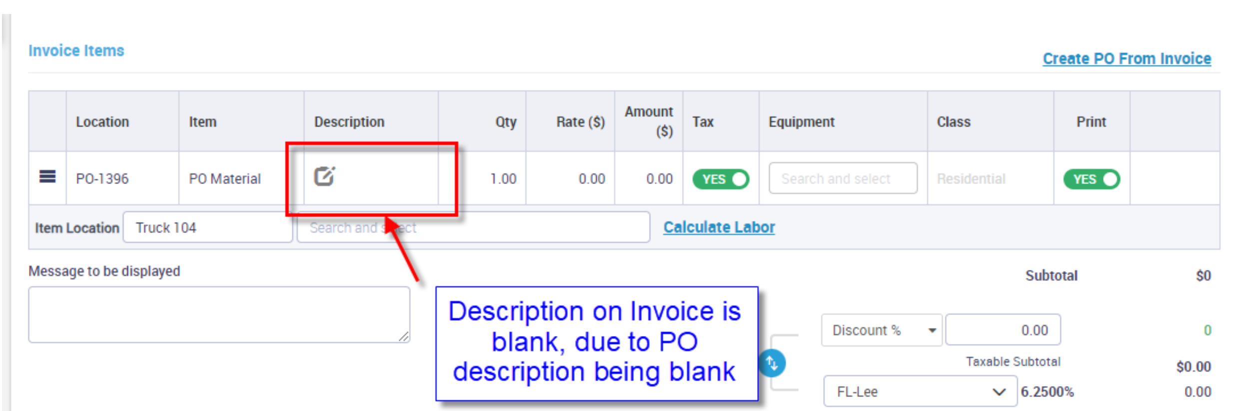


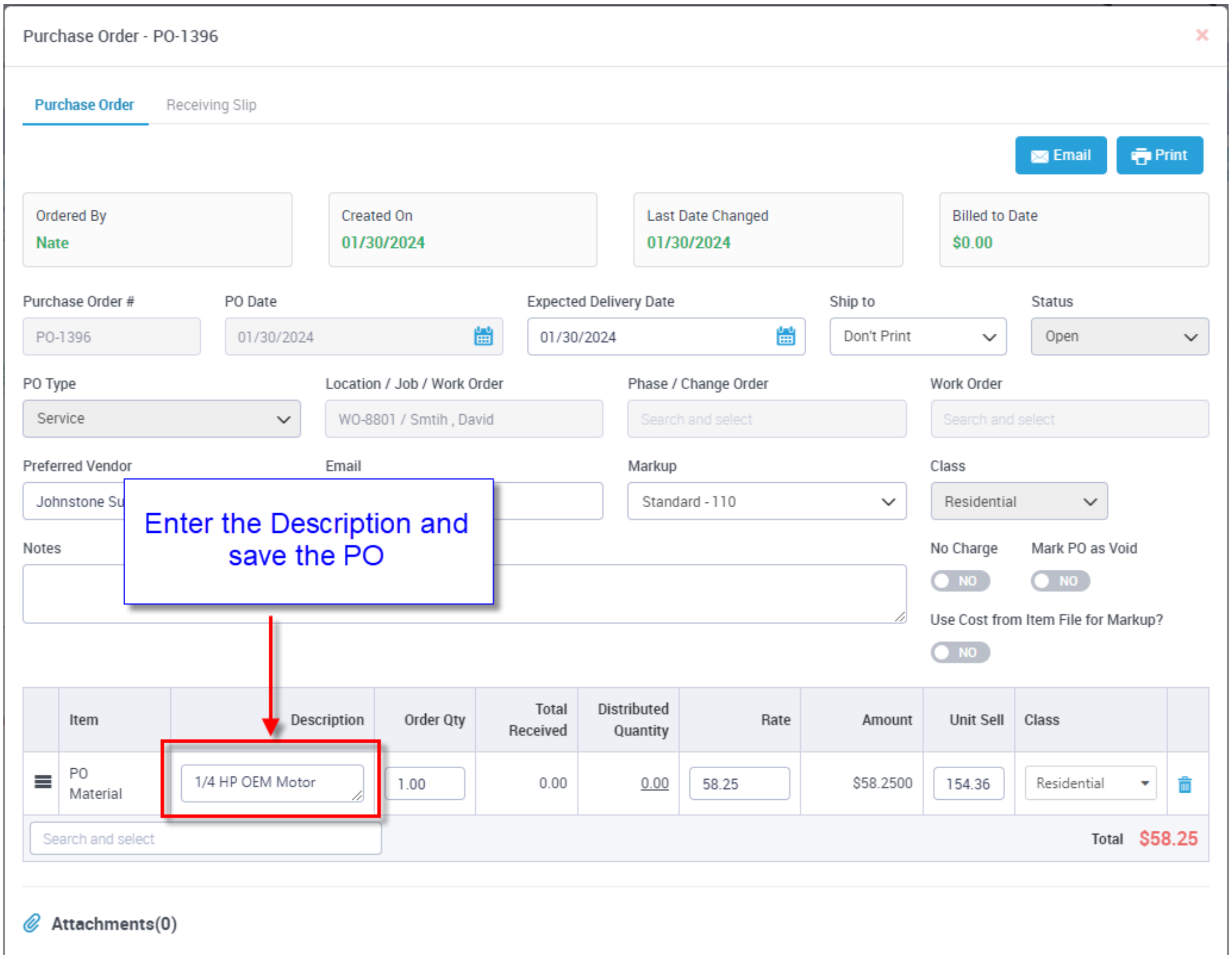
PO Number	Vendor	Customer Name	Location	PO Type	Expected Delivery Date	PO Date	Price	Billed To Date	Status
PO-1392	Johnstone Supply	Jacobs, Kevin	WO-8876	Service	01/24/2024	01/24/2024	$26.35	$0.00	Open
PO-1172	Johnstone Supply	Jacobs, Kevin	WO-7179	Service	03/21/2023	03/21/2023	$290.00	$290.00	Complete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

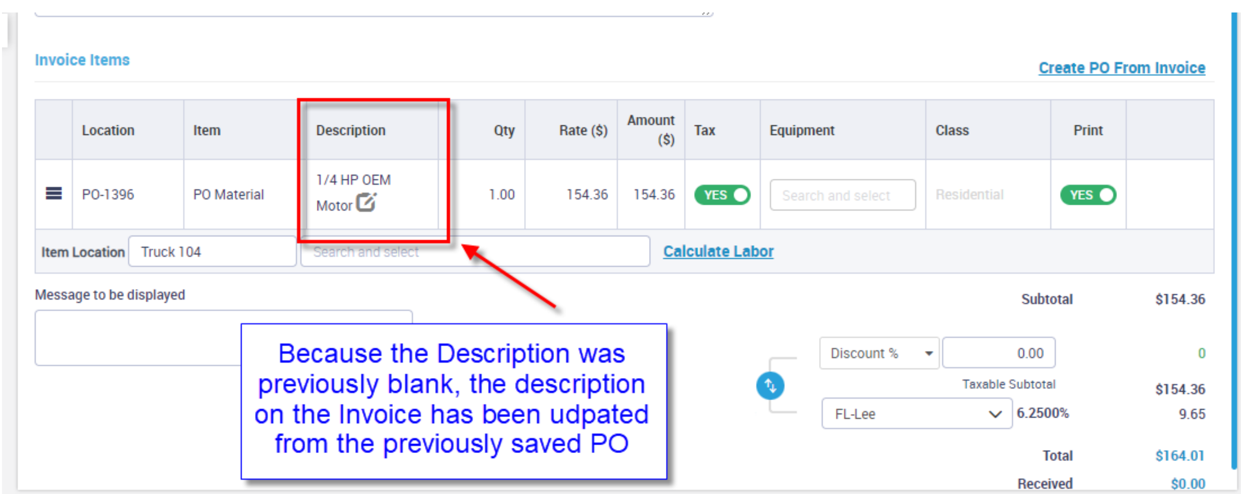
Purchase Orders – Blank descriptions will now be overridden when saving a PO an additional time

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.



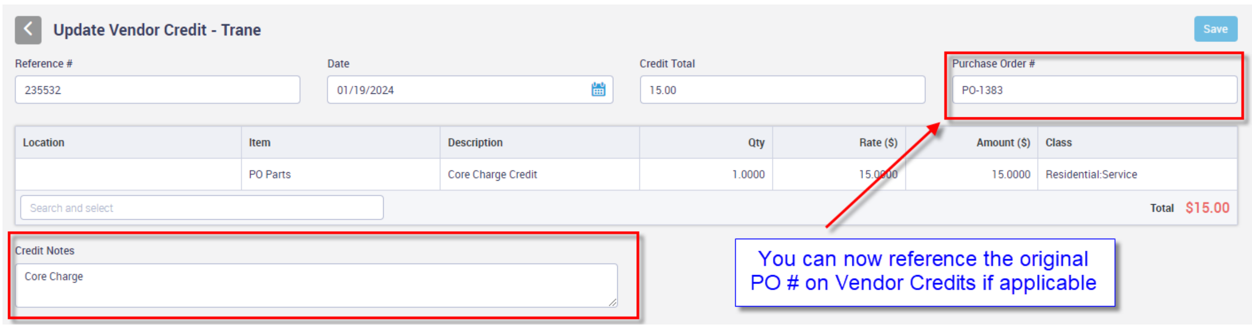


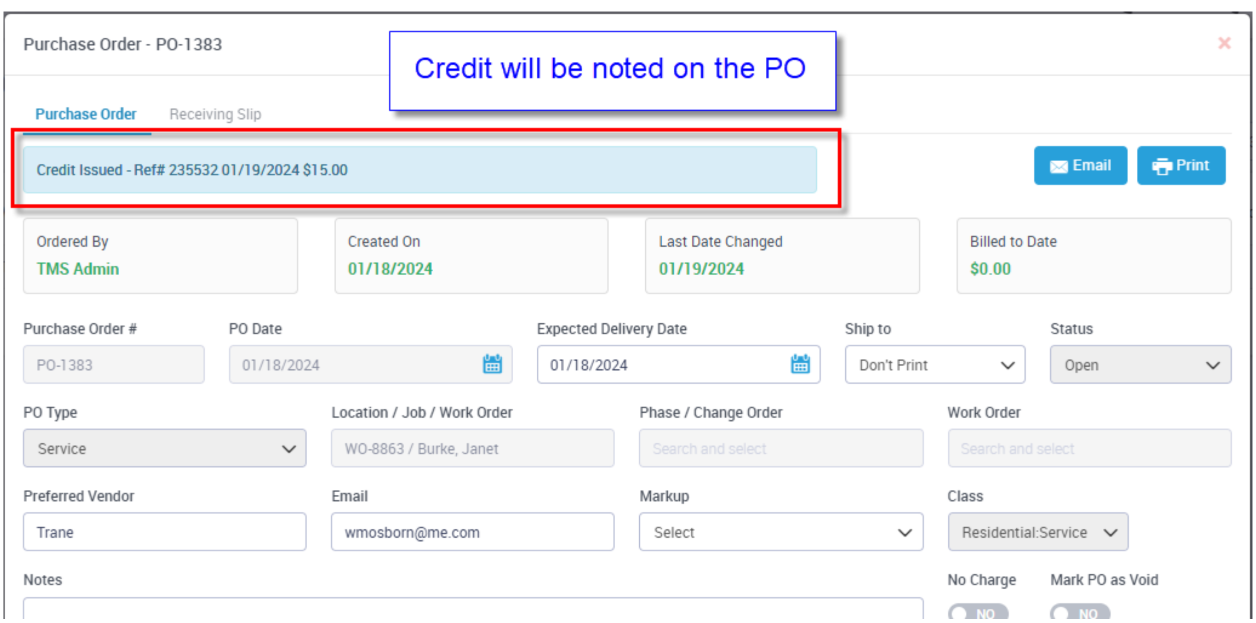

Purchase Order - PO-1396
Purchase Order
Receiving Slip
Email
Print
Ordered By
Nate
Created On
01/30/2024
Last Date Changed
01/30/2024
Billed to Date
$0.00
Purchase Order #
PO-1396
PO Date
01/30/2024
Expected Delivery Date
01/30/2024
Ship to
Don't Print
Status
Open
PO Type
Service
Location / Job / Work Order
WO-8801 / Smtih , David
Phase / Change Order
Search and select
Work Order
Search and select
Preferred Vendor
Johnstone Su
Email
Markup
Standard - 110
Class
Residential
Notes
No Charge
NO
Mark PO as Void
NO
Use Cost from Item File for Markup?
NO
Enter the Description and save the PO
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
Search and select
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
Search and select
Calculate Labor
Message to be displayed
Subtotal
$154.36
Discount %
0.00
0
Taxable Subtotal
$154.36
FL-Lee
6.2500%
9.65
Total
$164.01
Received
$0.00
Because the Description was previously blank, the description on the Invoice has been udpated from the previously saved PO

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

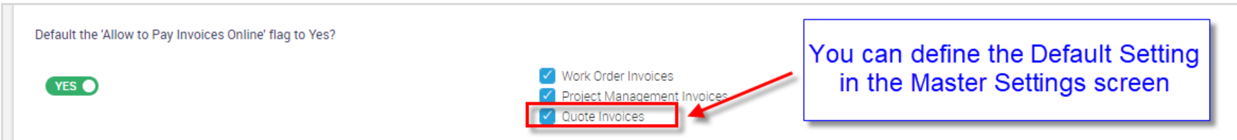
When entering a Vendor Credit, you now have the option to reference the original Purchase Order on which the item(s) were purchased. This will display a message at the top of the PO indicating the reference number, the date and the amount of the credit. In addition to the original PO Number, you can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

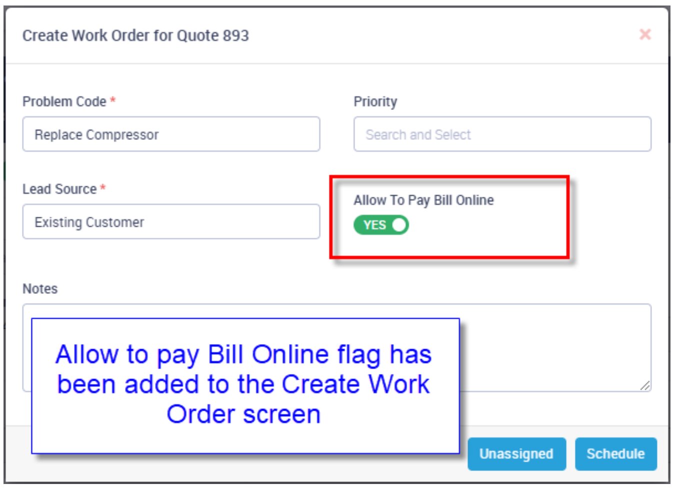




Quotes – The “Allow to pay bill online” flag has been added to the Create Work Order screen

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.





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.