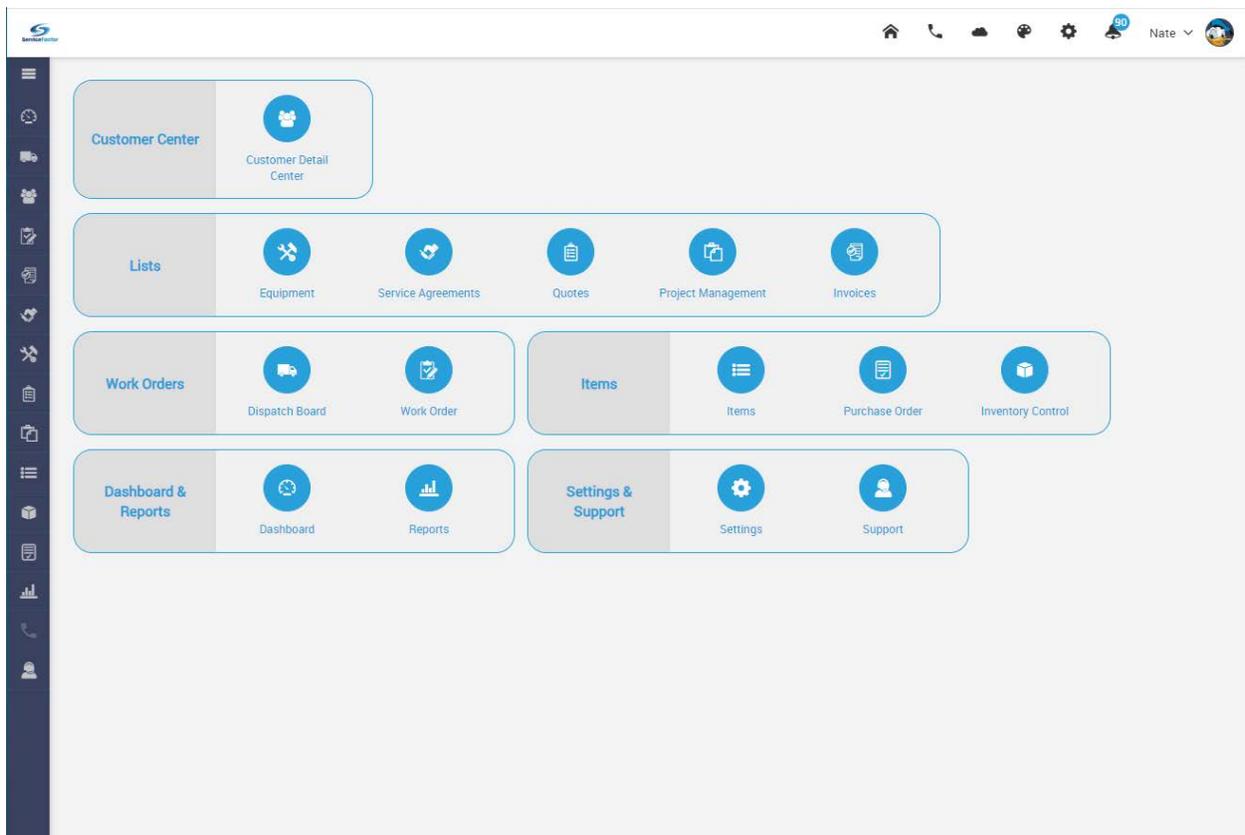


SF Release Notes: March 13, 2024

Login – A new “Main Menu” Screen

A new “Main Menu” screen has been added to the system and is now the default screen that is displayed when logging into ServiceFactor. The Main Menu has the same menu options as the menu on the left. If you want to return to the Main Menu screen, you can click the “Home” icon in the Top Menu selections.

NOTE – By landing on the Main Menu screen as opposed to the Dashboard, logging into the system will be faster and more efficient. If you want to view the Dashboard, simply click the Dashboard Menu option.



Click the “Home” icon to return to the Main Menu from anywhere within the ServiceFactor Program.



Invoice Screen – A new permission has been added to Un-Post an Invoice

A new permission has been added to the Employee file that will determine if users can Un-Post an invoice. If you do not have permission to Un-Post, you will not be able to make changes to the Invoice that would cause it to become un-posted. **NOTE** – By default, employees will NOT have permission to un-post invoices. After the update, you will need to give permission to any employee that you want to have the ability to un-post invoices.

The screenshot shows the 'Update Employee' interface. On the right side, under 'OFFICE ACCESSIBILITY', there is a section for 'Ability to Un-Post Invoices'. A red box highlights a toggle switch currently set to 'NO'. A blue callout box with an arrow points to this toggle, containing the text: 'Assign permission to Un-Post Invoices in the Employee File under the Office Accessibility Section'.

The screenshot shows an invoice screen with various fields. A blue callout box with a white background and a blue border is positioned over the 'Work Order History Summary' and 'Invoice Items' sections. The text inside the callout reads: 'Fields on the invoice will be "grayed out" if you do not have permission to Un-Post'. The invoice details include: Bill To: Conrady, Nick; Invoice #: F-2261; Invoice Date: 03/04/2024; Due Date: 03/04/2024; Invoice Amount: \$612.00; Balance: \$612.00.

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
	DMA 2	2 System PMA							

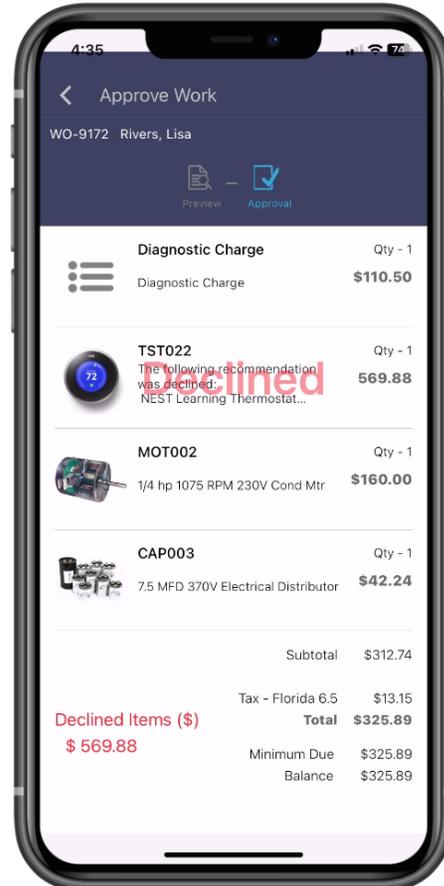
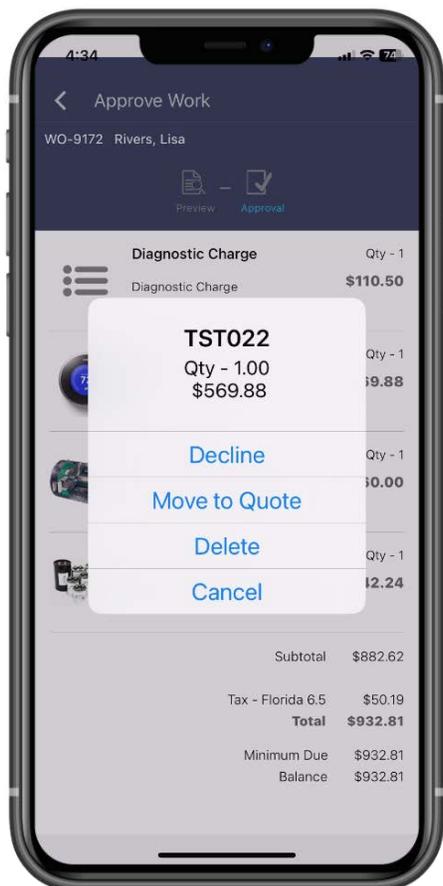
ServiceFactor Mobile – New “Decline” feature has been added to the Approval Screen

A new feature has been added to the Approval Screen that will allow you to Decline, Move to Quote or Delete feature has been added to the Approval Screen in ServiceFactor Mobile.

When viewing the Approval Screen, Simply tap on an Item if you want to Decline it, Move it to a Quote or Delete the item from the approval. If you decline the quote, the item will be displayed on the printed / Emailed Invoice, but will show that it has been declined. It will also show as Declined on the Billable Items Screen, Invoice Screen and in the History Screens. The decline option should be used when the customer is offered a repair and declines it. If they would like a separate quote for an item, you can use the Move to Quote option and if you want to delete an item completely, use the Delete option.

NOTE – If you have declined a repair and want to actually accept it, tap on the Declined item in the Approval Screen and choose “Approve” to accept the previously declined item. You will need to capture another signature if the repair was originally declined by the customer.

IMPORTANT – You will need to add a “Service Item” with the description you want to use for the “Declined” repairs, for example something like “The following recommendation was declined:”. You will need to enter that item in the “Declined Item” field in the “Master Settings” screen.



Invoice Items

[Create PO From Invoice](#)

	Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print	
		Diagnostic Charge	Diagnostic Charge	1.00	110.50	110.50	<input type="radio"/> NO	AC100	Residential	<input checked="" type="radio"/> YES	
	Truck 102	TST022	The following recommendation was declined: NEST Learning Thermostat Qty: 1 @ \$569.88 = \$569.88	0.00	0.00	0.00	<input checked="" type="radio"/> YES	AC100	Residential	<input checked="" type="radio"/> YES	
	Truck 102	MOT002	1/4 hp 1075 RPM 230V Cond Mtr	1.00	160.00	160.00	<input checked="" type="radio"/> YES	AC100	Residential	<input checked="" type="radio"/> YES	
	Truck 102	CAP003	7.5 MFD 370V Electrical Distributor	1.00	42.24	42.24	<input checked="" type="radio"/> YES	AC100	Residential	<input checked="" type="radio"/> YES	

Item Location [Calculate Labor](#)

Message to be displayed

Subtotal

\$312.74



AA Service

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

Proposed Work Approval

Date: **03/11/2024**
Work Order No. **WO-9172**

Bill To Address

Lisa Rivers
11851 Rosemount Dr
Fort Myers, FL 33913

Site Address

Lisa Rivers
11851 Rosemount Dr
Fort Myers, FL 33913

Description	Qty	Price (\$)	Amount (\$)	Approved
Equipment ID: AC100 - Ruud - M/N: RAWL-078CAZ - S/N: 987654654 - Side of house				
Diagnostic Charge	1.00	110.50	110.50	<input checked="" type="checkbox"/>
The following recommendation was declined: NEST Learning Thermostat Qty: 1 @ \$569.88 = \$569.88	-Declined Item-			
1/4 hp 1075 RPM 230V Cond Mtr	1.00	160.00	160.00	<input checked="" type="checkbox"/>
7.5 MFD 370V Electrical Distributor	1.00	42.24	42.24	<input checked="" type="checkbox"/>

Sub Total **\$312.74**

As a Value Club Member, you saved \$55.20 today. Thank you for being a Value Club Member.

Tax (6.5000 %) **\$13.15**

Total **\$325.89**

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.

Lisa Rivers

Signature

Lisa Rivers

The declined Item(s) along with the quantity and price will appear on both the Work Approval and the Invoice.



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

Invoice

Invoice Date: **03/11/2024**
 Invoice No: **F-8057**
 Due Date: **03/11/2024**
 Sales Rep:
 Customer PO:
 Work Order No. **WO-9172**

Bill To Address

Lisa Rivers
 11851 Rosemount Dr
 Fort Myers, FL 33913

Site Address

Lisa Rivers
 11851 Rosemount Dr
 Fort Myers, FL 33913

Description	Qty	Price (\$)	Amount (\$)
Equipment ID: AC100 - Ruud - M/N: RAWL-078CAZ - S/N: 987654654 - Side of house			
Diagnostic Charge	1.00	110.50	110.50
The following recommendation was declined: NEST Learning Thermostat Qty: 1 @ \$569.88 = \$569.88	-Declined Item-		
1/4 hp 1075 RPM 230V Cond Mtr	1.00	160.00	160.00
7.5 MFD 370V Electrical Distributor	1.00	42.24	42.24
Sub Total			\$312.74
Tax (6.5000 %)			\$13.15
Total			\$325.89

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Message

Authorization
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Lisa Rivers

Invoice / Quote Settings

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

YES

Work Order Invoices
 Project Management Invoices
 Quote Invoices

Problem Reported Item (Invoice): Tech Time Detail Item (Invoice): SF Work Dates:

Declined Item

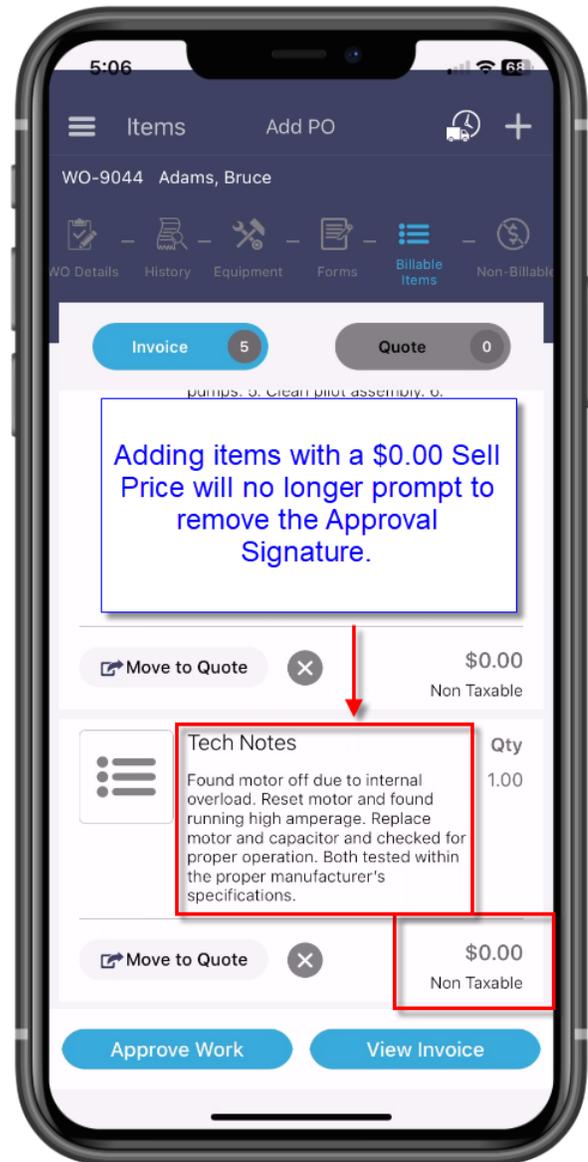
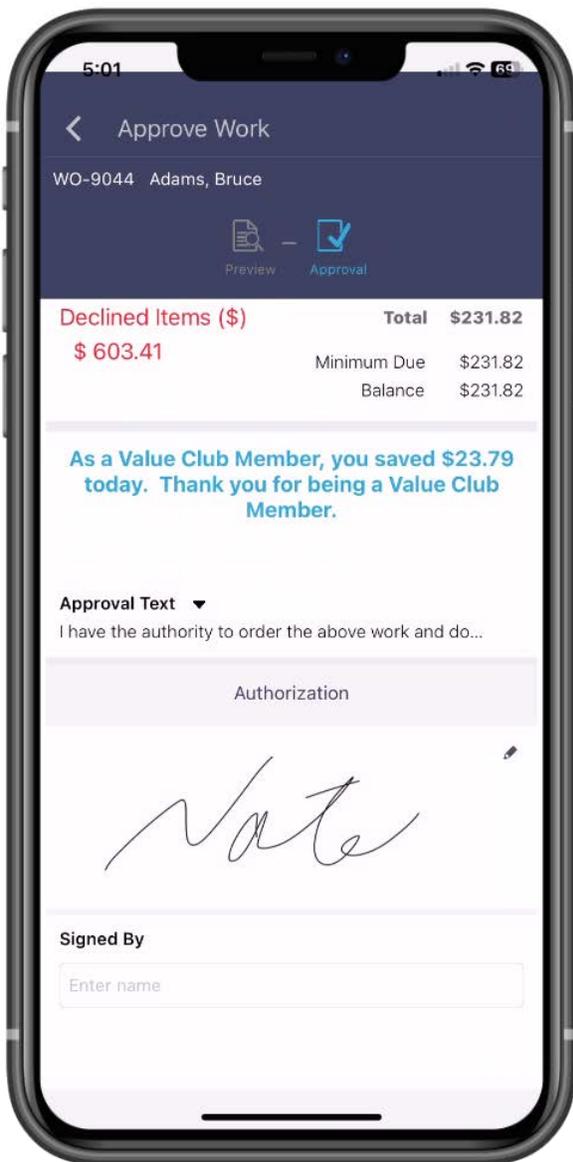
Default Invoice Footer
 LIMITED WARRANTY: All materials, parts, and equipment are warranted by the manufacturers' or suppliers' written warranty only. All labor performed by the above-

Add the "Declined Item" to the Master Settings screen to customize the "Declined" text on the Approval and Invoice

ServiceFactor Mobile – Ability to Add Notes without losing the Approval Signature

You can now add items with a \$0.00 Sell Price to the Work Order without losing the Approval Signature. For example, you might get an approval for recommended work, but need to add notes to the Work Order after you have completed the work. If you add a \$0.00 item, such as a “Tech Notes” item, you can modify the Description Text without clearing the Approval Signature.

NOTE – If you add any items with a Sell Price other than \$0.00, you will be prompted to verify that you want to remove the signature, as it always has.



ServiceFactor Mobile – You can now permission out the ability to Add a Work Order and/or View History.

With this release, you now have the option to limit technicians from Adding a Work Order or viewing History if there is not a Work Order already created. By default, the permissions will be set to “No”.

NOTE – You will need to grant permission to Create Work Orders and/or view History in the Employee File. This is very important if you have technicians that are “On Call” and you want them to create work orders through ServiceFactor Mobile.

Update Employee [Cancel] [Sync from Qbo] [Save]

Employee Details Tech Pay Rates / Costs

MOBILE ACCESSIBILITY

Mobile Access: Full | Number of WO On Mobile: 10 | Modify Pricing: Edit

Ability to Add Customer: YES | Ability to Add PO: YES | Add Quick Post Flag: YES | Mobile Manager: YES

Click Out Automatically: YES | Add WO Summary: YES | Create WO: NO | View History: YES

SKILLS: Drain Service, HVAC Service, Install, Maintenance, Plumbing Service, Pool Pumps, Retro

