

# SF Release Notes: October 3, 2024

## Improved Item Search in Invoices, Quotes and Project Management

We have improved the Item Search on Invoices, Quotes and Project Management. The new search displays more details about the item, as well as the ability to easily add any “Recommended Items” associated with the originally searched item, or the ability to choose an Alternate Item that has been associated with the originally searched item. This feature will allow you to associate recommended items to a specific item, allowing you to add multiple items to an invoice or quote quickly and easily.

You can also drill down into a category to view only the items associated with the selected category. This will make it easier to find a specific item if you do not know the item name, but know which category with which it is associated.

**NOTE** – You assign ‘Recommended’ and ‘Alternative’ (upgraded) items to an item in the Items file.

The screenshot displays the Salesforce interface for a Quote. The top navigation bar includes 'Quote Only', 'Timeline' (Last - 10/01/2024, On Record - 1), and 'Quote' (Primary - Good, Amount - \$0.00). The main form area is titled 'Quote Pending' and contains various input fields for item details, including PO #, Class, Markup, and Problem Code. A table titled 'Quote Items' is shown with columns for Item, Description, Qty, List Cost, Actual Cost, Rate (\$), Amount (\$), Tax, Equipment, Class, and Print. The table currently displays 'No records found'. A red box highlights the '+ Add Item' button in the table header. A callout box with a blue border and arrow points to this button, containing the text: 'Click the new "Add Item" link on Quotes, Invoices, etc.'. The bottom right of the form shows a summary table with Subtotal (\$0.00), Taxable Subtotal (\$0.00), and Total (\$0.00).

Item	Description	Qty	List Cost	Actual Cost	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
No records found										

Subtotal	\$0.00	
Discount %	\$0.00	
Taxable Subtotal	\$0.00	
Florida 6.5	6.5000%	\$0.00
<b>Total</b>	<b>\$0.00</b>	

**Item Search**

Item Categories

- Assembly
- Custer Park Apartments
- HVAC Flat Rate
- Inventory
- Job Cost
- Labor
- Non Inventory
- Plumbing
- Plumbing Flat Rate
- PMA
- Res Notes
- TNER-HVAC
- Universal testing

Search All Items

4trr

Items	Recommended Items
<p><b>4TTR6024J</b></p> <p>Trane XR-16 24000 BTUH Central A/C - The XR16 home air conditioning system has a SEER rating of up to 17.00, making it an excellent choice for home comfort and for earning energy-efficiency tax credits. Increased efficiency may substantially lower your home cooling costs. Materials for all central air conditioning systems are tested again and again for long-lasting performance and durability.</p>	<p>👍 0 👎 0 👁 View</p>
<p><b>4TTR6036J</b></p> <p>The XR16 home air conditioning system has a SEER rating of up to 17.00, making it an excellent choice for home comfort and for earning energy-efficiency tax credits. Increased efficiency may substantially lower your home cooling costs. Materials for all central air conditioning systems are tested again and again for long-lasting performance and durability.</p>	<p>👍 0 👎 0 👁 View</p>
<p><b>4TTR6048J</b></p> <p>The XR16 home air conditioning system has a SEER rating of up to 17.00, making it an excellent choice for home comfort and for earning energy-efficiency tax credits. Increased efficiency may substantially lower your home cooling costs. Materials for all central air conditioning systems are tested again</p>	<p>👍 5 👎 1 👁 View</p>

Search now shows more details about the items

You can now see if there are any Recommended or Alternative Items. Click the "View" link to view the Recommended or Alternate items.

**Recommended And Upgraded Items**

**4TTR6048J**

The XR16 home air conditioning system has a SEER rating of up to 17.00, making it an excellent choice for home comfort and for earning energy-efficiency tax credits. Increased efficiency may substantially lower your home cooling costs. Materials for all central air conditioning systems are tested again and again for long-lasting performance and durability.

	Recommended Items		Upgraded Items
<input checked="" type="checkbox"/>	<p><b>TEM8A0C48</b></p> <p>The M Series Communicating air handlers combine affordability and flexibility to work with the complete range of Trane heating and cooling products. So you get the reliability of Trane and the options to work within your specific system and budget.</p>	<input type="checkbox"/>	<p><b>4TWV8X48A1000A</b></p> <p>4TWV8X48A1000A - Trane XV-18 48000 BTUH Central A/C</p>
<input checked="" type="checkbox"/>	<p><b>Register6X10</b></p> <p>1- Way Adjustable Sidewall/Ceiling Register</p>	<input type="checkbox"/>	
<input type="checkbox"/>	<p><b>PAN001</b></p> <p>27" x 48" Plastic Condensate Drain Pan</p>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<p><b>PAN002</b></p> <p>30" x 60" Plastic Condensate Drain Pan</p>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<p><b>PVC201</b></p> <p>EZ-Trap with float switch</p>	<input type="checkbox"/>	

Clicking the 'View' link displays recommended items on the left, and upgraded or alternative items on the right. Place a check mark next to the recommended items you would like to include on the Quote or Invoice and they will automatically be added to the Quote or Invoice for you.

If you place a check mark in an 'Upgraded' item, it will replace the originally selected item and display any recommended items for that item

[Back](#) [Save](#)

Quote Only

Timeline Last - 10/01/2024 On Record - 1

Quote Primary - Good Amount - \$6,354.62

Quote Pending

Copy From Quote Email Print Save

again and again for long-lasting performance and durability.

TEM8A0C48 The M Series Communicating air handlers combine affordability and flexibility to work with the complete range of Trane heating and cooling products. So you get the reliability of Trane and the options to work within your specific system and budget.

Register6X10 1-Way Adjustable Sidewall/Ceiling Register

PAN002 30" x 60" Plastic Condensate Drain Pan

PVC201 EZ-Trap with float switch

1.00 1,445.95 2,342.44 2342.44 NO Search and select YES

1.00 7.43 6.75 27.06 27.06 NO Search and select YES

1.00 63.68 63.68 151.88 151.88 YES Search and select YES

1.00 32.50 32.50 81.90 81.90 YES Search and select YES

Add Item

Messana to be cleaned on next

All of the 'Recommended' items selected will be added to the invoice. The only thing left to do is adjust the Quantity of each item if necessary.

In the image below, items were searched by drilling into specific categories, as opposed to using the "Search" field. This will display all items under the selected category. Clicking on the actual item in the list will automatically add that item to the Invoice.

Item Search

Item Categories

- Assembly
- Custer Park Apartments
- HVAC Flat Rate
- Inventory
- 01 HVAC
- Batteries
- Belts
- Black Pipe
- Breakers
- Capacitors
- Chemicals & Cleaning
- Compressors
- Contactors

Search All Items (Under : Capacitors) x

Search Items.

Items	Recommended Items
CAP002 Generic Capacitor	👍 👎 👁 View
CAP003 7.5 MFD 370V Electrical Distributor	👍 👎 👁 View
CAP004 10 Mfd 370V Premium Capacitor	👍 👎 👁 View
CAP005 12.5 Mfd Capacitor	👍 👎 👁 View
CAP006 15 Mfd 370V Premium Capacitor	👍 👎 👁 View
CAP007 20 Mfd 370V Premium Capacitor	👍 👎 👁 View
CAP008 25 Mfd 370V Premium Capacitor	👍 👎 👁 View
CAP009 30 Mfd 370V Premium Capacitor	👍 👎 👁 View

Subtotal \$0.00

6.5000%

Total \$0.00

In this image, the Inventory Category was selected, then the '01 HVAC' sub category was selected and finally the 'Capacitors' sub category was selected. All items associated with the sub category of "Capacitors" are displayed on the right hand side.

# Reports – Project Management – New Job Estimate vs. Actual Report

A new Job Estimate vs. Actual Report has been added. This report is similar to the ‘Quote Estimate vs. Actual’ Report, but for Project Management jobs.

The Job Estimate vs Actual Report provides a comparison between the Estimated Costs on a Job vs. the Actual JTD Costs of the job. This report will also compare the Estimated Sell Price vs. the JTD Billed and reflect the estimated vs JTD gross margin as well as the variance. NOTE - The Collected and Remaining Amount will be based on the JTD Billed. The variance between Estimated Sell and JTD Sell will reflect the remaining amount that needs to be billed. The JTD billed will not reflect the retainage withheld by default, as technically, retainage has not yet been billed. However, there is an option to include the ‘Retainage’ withheld in the Billed to Date value if you desire.

If you select more than one Job on the report, the Grand Totals of all jobs selected will be printed at the bottom of the report

Tuesday, October 1, 2024		Job Estimate vs Actual				1/1	
Job #	<a href="#">24-21</a>	Stillwater, Johnny	Bill To:	ABC Builder	Class: Installation		
G. C. Job #	45a4863	4562 Apple Tree		PO Box 1245	Business Entity: Installation		
Approved:	5/2/2024	Montgomery, Texas 77356		Dallas, Texas 75023	Lead Source: Existing Customer		
Completed					Salesperson: Drew		
Job Name:	Stillwater Install	PO #:	Status:	Accepted	Project Manager Nate		
	<b>Sell</b>	<b>Tax</b>	<b>Total</b>	<b>Cost</b>	<b>GP \$</b>	<b>GP %</b>	<b>Collected</b>
<b>Estimated:</b>	13,309.56	0.00	13,309.56	8,921.50	4,388.06	32.97%	5,000.00
<b>JTD:</b>	7,492.87	0.00	7,492.87	1,001.76	6,491.11	86.63%	<b>Remaining</b>
<b>Variance:</b>	5,816.69	0.00	5,816.69	7,919.74	-2,103.05		2,492.87
<b>Grand Totals</b>							
	<b>Sell</b>	<b>Tax</b>	<b>Total</b>	<b>Cost</b>	<b>GP \$</b>	<b>GP %</b>	<b>Collected</b>
<b>Estimated:</b>	13,309.56	0.00	13,309.56	8,921.50	4,388.06	32.97%	5,000.00
<b>JTD:</b>	7,492.87	0.00	7,492.87	1,001.76	6,491.11	86.63%	<b>Remaining</b>
<b>Variance:</b>	5,816.69	0.00	5,816.69	7,919.74	-2,103.05		2,492.87

# Reports – Project Management – New Project Management Invoice Balance Report

A new Project Management Invoice Balance Report has been added. The Project Management Invoice Balance Report lists the total sell price of a job, the amount invoiced, the amount paid, the balance left to be paid based on what has been invoiced and the total percent billed. If you elect to show details, it will list each invoice, the invoice date, invoice amount, paid amount and balance left to be paid, in addition to the total amount invoiced overall on the Job.

The first image shows the overall summary for each job and the second image shows the breakdown, which lists each invoice for the jobs along with the balance of each invoice.

Tuesday, October 1, 2024 Job Invoice Balance Report 1/1

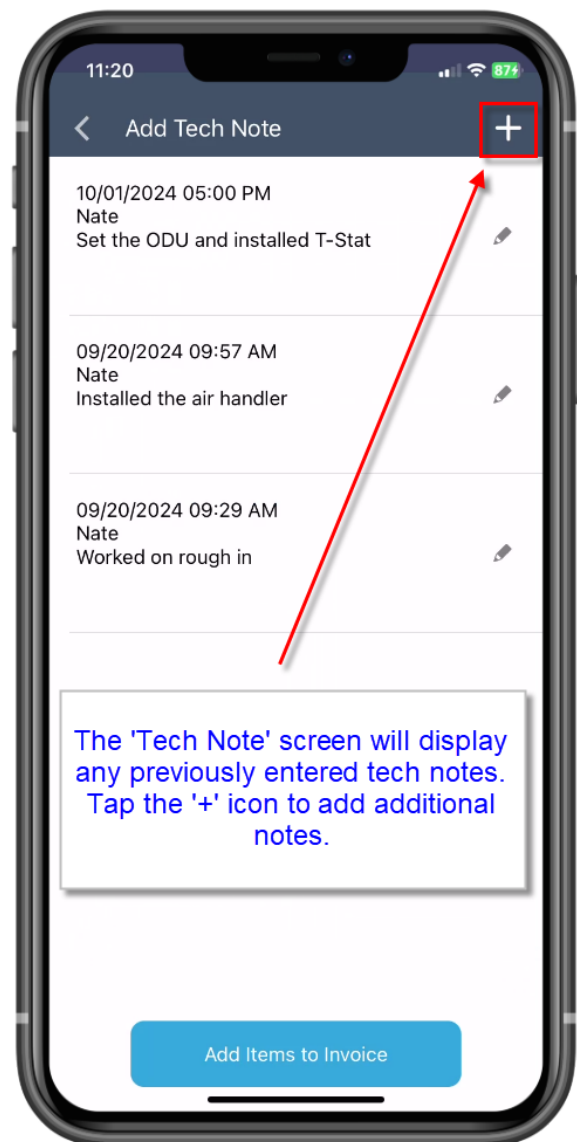
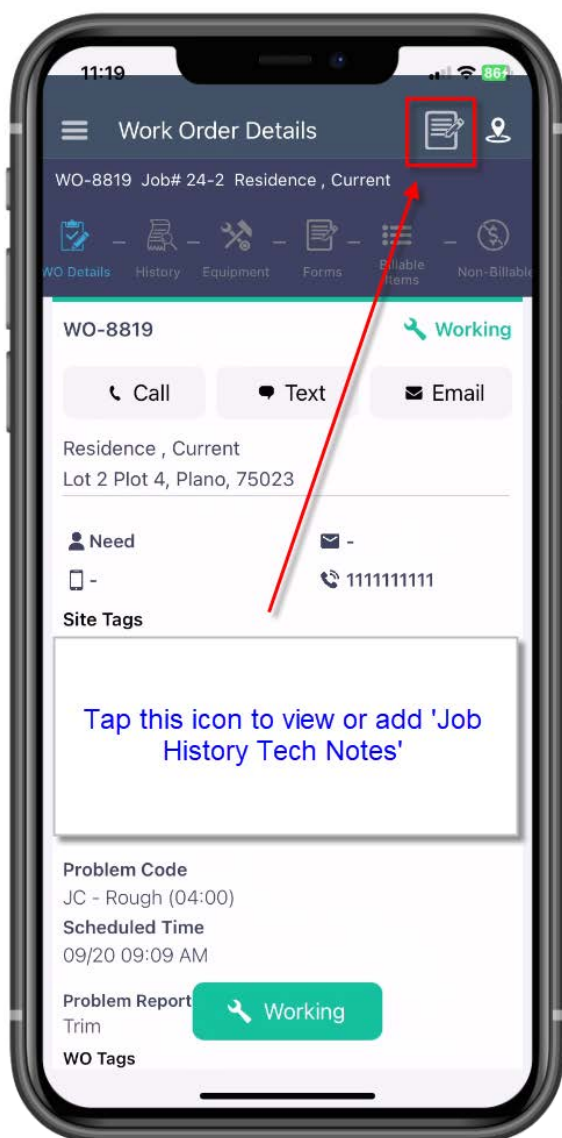
Job #	Job Name	Sell Price	Tax	Invoiced	Tax Invoiced	Paid	Balance	% Billed
<a href="#">24-10</a>	New Home	25,000.00	0.00	3,125.00	0.00	0.00	3,125.00	12.50%
<a href="#">24-11</a>	New Home	27,500.00	561.00	25,750.00	0.00	0.00	25,750.00	93.64%
<a href="#">24-12</a>	Dave Smith replacement	14,745.00	0.00	10,125.00	0.00	0.00	10,125.00	68.67%
<a href="#">24-15</a>	Remodel Wal Mart	25,000.00	0.00	5,178.18	0.00	0.00	5,178.18	20.71%
<a href="#">24-2</a>	New Peach Flr Plan	10,900.00	0.00	4,400.00	0.00	0.00	4,400.00	40.37%
<a href="#">24-21</a>	Stillwater Install	13,309.56	0.00	7,492.87	0.00	5,000.00	2,492.87	56.30%
<a href="#">24-28</a>	Replace RTU	10,000.00	0.00	4,500.00	0.00	0.00	4,500.00	45.00%
<a href="#">24-31</a>	Remodel	10,000.00	625.00	112.50	0.00	0.00	112.50	1.13%
<a href="#">24-32</a>	Remodel of kitchen	13,000.00	0.00	6,075.00	0.00	0.00	6,075.00	46.73%
<a href="#">24-35</a>	install	5,683.00	468.85	5,683.00	0.00	0.00	5,683.00	100.00%
<a href="#">24-36</a>	Stone Family Home	10,000.00	825.00	6,000.00	0.00	0.00	6,000.00	60.00%
<a href="#">24-5</a>	Replace 15 RTUs	15,000.00	0.00	15,000.00	0.00	1,125.00	13,875.00	100.00%
<a href="#">24-9</a>	Balance Health	16,590.00	1,368.68	9,193.95	586.39	5,000.00	4,780.34	55.42%
<b>Grand Totals:</b>		196,727.56	3,848.53	102,635.50	586.39	11,125.00	92,096.89	52.17%

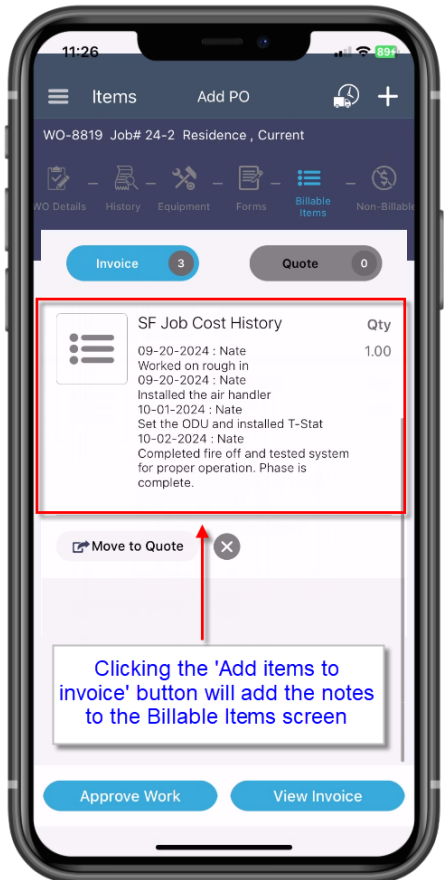
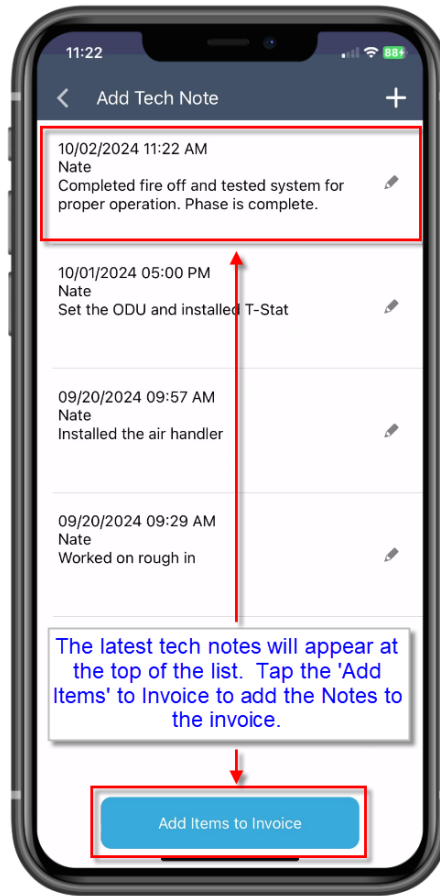
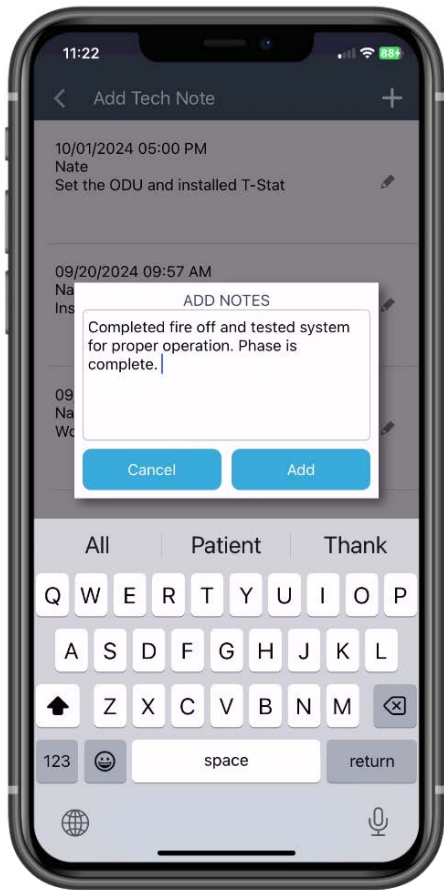
Tuesday, October 1, 2024 Job Invoice Balance Report 1/3

Job #	Job Name	Sell Price	Tax	Invoiced	Tax Invoiced	Paid	Balance	% Billed																									
<a href="#">24-10</a>	New Home	25,000.00	0.00	3,125.00	0.00	0.00	3,125.00	12.50%																									
		<table border="1"> <thead> <tr> <th>Invoice #</th> <th>Invoice Date</th> <th>Invoice Amt</th> <th>Paid</th> <th>Balance</th> </tr> </thead> <tbody> <tr> <td>J-511</td> <td>5/9/2024</td> <td>3,125.00</td> <td>0.00</td> <td>3,125.00</td> </tr> </tbody> </table>							Invoice #	Invoice Date	Invoice Amt	Paid	Balance	J-511	5/9/2024	3,125.00	0.00	3,125.00															
Invoice #	Invoice Date	Invoice Amt	Paid	Balance																													
J-511	5/9/2024	3,125.00	0.00	3,125.00																													
<a href="#">24-11</a>	New Home	27,500.00	561.00	25,750.00	0.00	0.00	25,750.00	93.64%																									
		<table border="1"> <thead> <tr> <th>Invoice #</th> <th>Invoice Date</th> <th>Invoice Amt</th> <th>Paid</th> <th>Balance</th> </tr> </thead> <tbody> <tr> <td>J-488</td> <td>2/21/2024</td> <td>9,000.00</td> <td>0.00</td> <td>9,000.00</td> </tr> <tr> <td>J-489</td> <td>2/21/2024</td> <td>11,250.00</td> <td>0.00</td> <td>11,250.00</td> </tr> <tr> <td>J-487</td> <td>2/21/2024</td> <td>4,500.00</td> <td>0.00</td> <td>4,500.00</td> </tr> <tr> <td>J-490</td> <td>2/21/2024</td> <td>1,000.00</td> <td>0.00</td> <td>1,000.00</td> </tr> </tbody> </table>							Invoice #	Invoice Date	Invoice Amt	Paid	Balance	J-488	2/21/2024	9,000.00	0.00	9,000.00	J-489	2/21/2024	11,250.00	0.00	11,250.00	J-487	2/21/2024	4,500.00	0.00	4,500.00	J-490	2/21/2024	1,000.00	0.00	1,000.00
Invoice #	Invoice Date	Invoice Amt	Paid	Balance																													
J-488	2/21/2024	9,000.00	0.00	9,000.00																													
J-489	2/21/2024	11,250.00	0.00	11,250.00																													
J-487	2/21/2024	4,500.00	0.00	4,500.00																													
J-490	2/21/2024	1,000.00	0.00	1,000.00																													
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Invoice #	Invoice Date	Invoice Amt	Paid	Balance																													
J-491	2/29/2024	1,800.00	0.00	1,800.00																													
J-492	2/29/2024	-1,800.00	0.00	-1,800.00																													
J-493	2/29/2024	2,025.00	0.00	2,025.00																													
J-494	3/6/2024	8,100.00	0.00	8,100.00																													
<a href="#">24-15</a>	Remodel Wal Mart	25,000.00	0.00	5,178.18	0.00	0.00	5,178.18	20.71%																									
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Invoice #	Invoice Date	Invoice Amt	Paid	Balance																													
J-497	4/3/2024	5,178.18	0.00	5,178.18																													
<a href="#">24-2</a>	New Peach Flr Plan	10,900.00	0.00	4,400.00	0.00	0.00	4,400.00	40.37%																									
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Invoice #	Invoice Date	Invoice Amt	Paid	Balance																													
J-475	1/12/2024	4,400.00	0.00	4,400.00																													

## ServiceFactor Mobile – Ability to add ‘Job History Tech Notes’ has been added for Project Management Work Orders

A new feature has been added to SF Mobile that will allow technicians to enter ‘Job History Tech Notes’ that will be displayed on a separate tab in the Work Order timeline back at the office. This feature can be used by both Full Mobile Licensed technicians as well as Basic Mobile Licensed technicians. Technicians will be able to view the ‘Job History Tech Notes’ from the field. The concept is so that techs can keep track of what has been done and by whom as the job progresses. The ‘Job History Tech Notes’ added can be viewed on the Timeline Screen of the appropriate work order associated with the job. Office personnel can also add notes to the Job History Tech Notes screen, but it is designed for techs to be able to enter their progress daily. When a note is added, the system will automatically record the user, date and time that the Note was added. The notes can be automatically added to the Invoice Screen so that they will be visible in the Work Order History.





Work Order Details

CR

Residence, Current  
Lot 2 Plot 4, Plano, Texas, 75023  
(111) 111-1111

Tags

WO-8819 ASSIGNED

From Project Management - No  
24-2

Assigned Technician  
History

Problem code  
JC - Rough

Estimated Time  
04:00 hours

Priority

Problem Reported  
Trim

Site Notes

Work Order Tags  
None

Site Tags  
None

Timeline

Timeline

Job History

Add Tech Note

Add To Invoice

Attachments(2)

Enter Description

Nate added 'Invoice\_F-7741\_23392\_WorkOrder\_print' 10/02/2024 11:30 AM

Nate added 'Invoice\_F-7741\_23392\_WorkOrder\_print' 09/20/2024 09:57 AM

10/02/2024 : Nate  
Completed fire off and tested system for proper operation. Phase is complete.

10/01/2024 : Nate  
Set the ODU and installed T-Stat

09/20/2024 : Nate  
Installed the air handler

09/20/2024 : Nate  
Worked on rough in

A new 'Job History' tab has been added to 'Project Management' Work Orders that will display the 'Job History Tech Notes' from SF Mobile

SF Job Cost History - Edit Description

09-20-2024 : Nate  
Worked on rough in

09-20-2024 : Nate  
Installed the air handler

10-01-2024 : Nate  
Set the ODU and installed T-Stat

10-02-2024 : Nate  
Completed fire off and tested system for proper operation. Phase is complete.

Job History Tech Notes will appear on the Work Order Invoice if you elect to add them to the Invoice, which will appear in the History

Cancel Save

Invoice Items

Location	Item	Description	Qty	Rate (\$)	Amount (\$)	Tax	Equipment	Class	Print
	SF Job Cost History	09-20-2024 : Nate Worked on rough in 09-20-2024 : Nate Installed the air handler 10-01-2024 : Nate S	1.00	0.00	0.00	NO	Search and select		YES

Item Location Truck 102 + Add Item

Message to be displayed

Subtotal \$0



## SF Mobile – Ability to hide the Customer Listing from SF Mobile users has been implemented

A new permission has been added to the Employee file that will allow you to prevent technicians from viewing the Customer File in SF Mobile. If you set the “Ability to Look Up Customers” slider to “No”, the employee will no longer be able to view the Customer List.

**NOTE** – If you disable this feature, the technician will no longer be able to View Customers, Add a new Work Order, View Equipment or View History if they have NOT downloaded a Work Order for the customer to their device.

**NOTE 2** - If you disable this feature, the technician will not be able to add a new work order, or look up customer information after hours from their device. They will be dependent on the office to add work orders after hours.

**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  
MITC Devices: Nates E285

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

Clock Out Automatically: YES  
Add WO Summary: YES  
Create WO: YES  
View History: YES

**Ability To Look Up Customers: YES**

**SKILLS**

Drain Service  HVAC Service  Install  Tank & Tankless Water Heaters  WI Freezer

**ONLINE SCHEDULE ZONES**

Central Plano  Converse  Coppell North  
 Houston  Naples  NCT  North FM  Out of State  Plano  Plano East  Plano North  
 Plano - West  S FM South  S FM West  South FM

**SCHEDULED INFORMATION**

DAY	START TIME	END TIME	OT START	OT END	DT START	DT END
-----	------------	----------	----------	--------	----------	--------

**Change the 'Ability to Look Up Customers' slider to 'No' if you do not want technicians to be able to add work orders, look up customers, view customer history, or view customer equipment if they do not have a Work Order for the customer downloaded to their device.**

