

SF Release Notes: March 19, 2025

Package Items have been added to the system

ServiceFactor now has a new item type called ‘Package Item’ that will allow you to group multiple items under one specific item name. When you choose a Package Item on a quote, invoice, job phase or purchase order, the system will automatically add all items associated with the Package Item to the appropriate form. At that point you can edit the quantity, delete a particular item or make appropriate adjustments as necessary. This feature will make it quick and easy to add multiple items by selecting only one item.

When a package item is selected, you will see a ‘package icon’ on each line for which an item was added from the package. All items from a particular package will have the same color icon. If you add multiple package items, each item from the various packages will have their own unique color. For example, if you have 4 items in the first package, each item may display a red ‘package icon’. If you add another package item that contains 6 items, each of those items might display a green ‘package icon’, etc.

To set up a package item, simply choose an item type of ‘Package Item’ when adding a new item. This will allow you to enter a package name and description and allow you to add as many items to the package as you would like. By default, it will use the markup table or fixed price associated with each item, but if applicable, you can override the default pricing with a fixed price. If using the Markup method, the sell prices will be based on the particular customer’s markup table.

Edit Item Package [Cancel] [Save]

Package Name *
Trane 4 Ton System Active

Description
Trane 4 Ton System

Item Name	Item Description	Type	Qty	Cost	Price	Override	Package Price	Total	
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.	Non-Inventory	1.00	\$ 2306.26	\$ 4151.27	<input type="checkbox"/>	4151.27	\$ 4151.27	
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.	Non-Inventory	1.00	\$ 1445.95	\$ 2602.71	<input type="checkbox"/>	2602.71	\$ 2602.71	
TST022	NEST Learning Thermostat	Inventory	1.00	\$ 291.50	\$ 728.75	<input type="checkbox"/>	728.75	\$ 728.75	
PAD013	36"x48"x3" Ultralite Cond Pad	Inventory	1.00	\$ 123.30	\$ 308.25	<input type="checkbox"/>	308.25	\$ 308.25	
Lineset3878	50 Feet of 3/8" LL x 7/8" SL x 3/8" Insulated Line Set	Inventory	1.00	\$ 247.50	\$ 618.75	<input type="checkbox"/>	618.75	\$ 618.75	

[+ Add Item](#)

Estimated Sell Price Material/Sub/Other Cost Labor Cost Estimated Profit Estimated Gross Margin
 \$8409.73 - \$4414.51 - \$0.00 = \$3995.22 90.50%

Quote Pending

Copy From Quote | Email | Print | Save

Item ID	Description	Qty	Unit Price	Ext Price	Disc Price	Disc Ext	Options	Search	Status	Actions
TEM8A0C48	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.	1.00	1,445.95	2,147.24	2,147.24		NO	Search and select	YES	🗑️
TST022	NEST Learning Thermostat	1.00	291.50	524.70	524.70		YES	Search and select	YES	🗑️
PAD013	36"x48"x3" Ultralite Cond Pad	1.00	123.30	221.94	221.94		YES	Search and select	YES	🗑️
Lineset3678	50 Feet of 3/8" LL x 7/8" SL x 3/8" Insulated Line Set	1.00	247.50	495.00	495.00		NO	Search and select	YES	🗑️

+ Add Item

Message to be displayed on quote

Notes

Subtotal: \$6,813.68
 Discount %: \$0.00
 Taxable Subtotal: \$746.64
 TX-Plano-305799: 8.2500% \$61.60
Total: \$6,875.28

When you add a 'Package Item', each item associated with the particular package will display a 'package icon' with a like color.

Add Item

Choose Item Type

- Select-
- Select-
- Assembly
- Deferred Income
- Flat Rate
- Inventory
- Non-Inventory
- Package Item**
- Service
- Subtotal

Choose the item type 'Package Item' when adding a package item to the system.

Items (2)

Cost Utility | Update Utility | QB Sync | Print | Export

Toggle + Add Search by Name

Name	Sales Description	Category	Price	Item Type	Qty Available	Reorder Point	On Order	Status	Actions
HVAC Install Kit	Standard HVAC Install kit		\$ 1448.06	Package Item				Active	View
Trane 4 Ton System	Trane 4 Ton System		\$ 8409.73	Package Item				Active	View

Showing 1 - 2 of 2

A new tab has been added to the 'Item' file for Package Parts

A new Customer Billing Invoices feature has been added

A new feature has been added that will allow you to see all invoices associated with a particular 'Bill To' customer. This screen has multiple filters that will allow you to narrow down the invoices displayed by Starting and Ending invoice dates, invoice type, posted status, salesperson, business entity and invoice only invoices. You can also filter to show only invoices with balances and the ability to suppress Job WO invoices. In addition to listing the invoices, you will be able to see the Total value of invoices and the current balance for the Bill To customer, as well as the Filtered value of invoices and the current balance.

To access the new screen, simply click the 'Bill To Invoices' link from the Customer Detail Center or the Work Order Detail Center.

NOTE – The customer displayed will be whoever the Bill To is for the particular record. For example, if you are accessing it from the Work Order Details Center, the system will be directed to the Bill To customer of the Work Order, not necessarily the Site where the work is being done.

Customer Billing Invoices

Customer Name: **ABC Builder**

Total Invoices: \$530,676.62
Balance: \$455,625.32

Filtered Invoices: \$87,143.63
Balance: \$83,143.63

Start Date: [Start Date] End Date: [End Date] Invoice Type: [All] Posted Status: [Both] Search: [Search] Salesperson: [William] Business Entity: [Search and select]

Invoice Only Invoices: [NO] Only Invoices With Balances: [YES] Suppress Job WO Records: [NO]

Source	Site Name	Invoice #	Invoice Date	Due Date	Invoice Amount	Balance	WO #	Posted	Action
JOB	Current_Resident - Lot 14	J-624	01/14/2025	02/13/2025	\$300.00	\$300.00	WO-11048	✓	[Icon]
JOB	Stone Family	J-529	07/17/2024	08/16/2024	\$6,000.00	\$6,000.00	WO-9879	✓	[Icon]
JOB	Uncle Paul's Pizza NY	J-522	06/18/2024	07/18/2024	\$2,700.00	\$2,700.00	WO-9728	✓	[Icon]
JOB	Uncle Paul's Pizza NY	J-520	06/07/2024	07/07/2024	\$562.50	\$562.50	WO-9686	✓	[Icon]
JOB	Uncle Paul's Pizza NY	J-521	06/07/2024	07/07/2024	\$2,812.50	\$2,812.50	WO-9688	✓	[Icon]
JOB	Giff, Chris	J-519	06/05/2024	06/05/2024	\$112.50	\$112.50	WO-9665	-	[Icon]

Customer Details

ABC Builder
PO Box 1245, Dallas, Texas, 75023
(214) 555-1414
michele_frederick@earthlink.net

Payment Status - Posted Invoices
Overdue: \$42,086.92 Open: \$42,086.92

Bill To Invoices

Timeline: Last - 03/05/2025 On Record - 48

Work Orders: Open - 4 Completed - 4

Equipment: Total - 2

Agreements: Active - 1 Total - 6

Invoice: Invoiced - \$105,606.00 Balance - \$100,284.51

Quotes: Total - 2

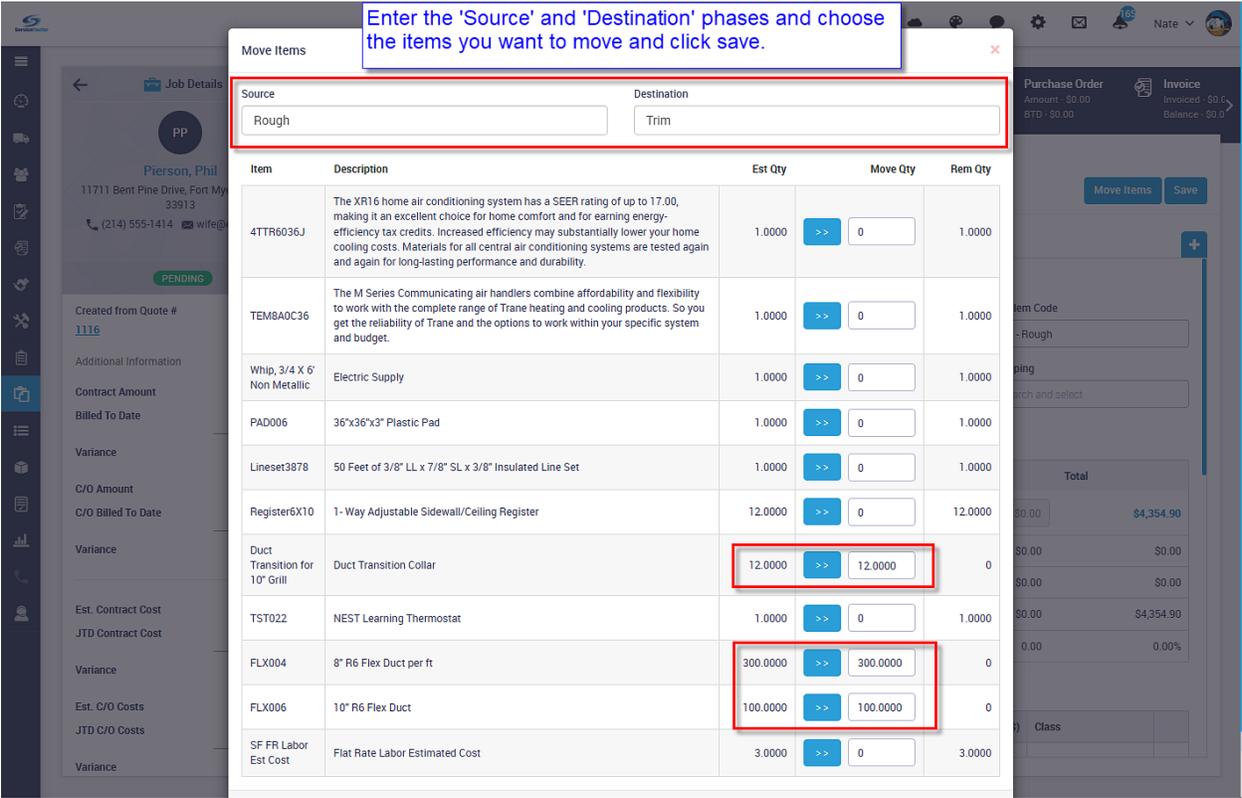
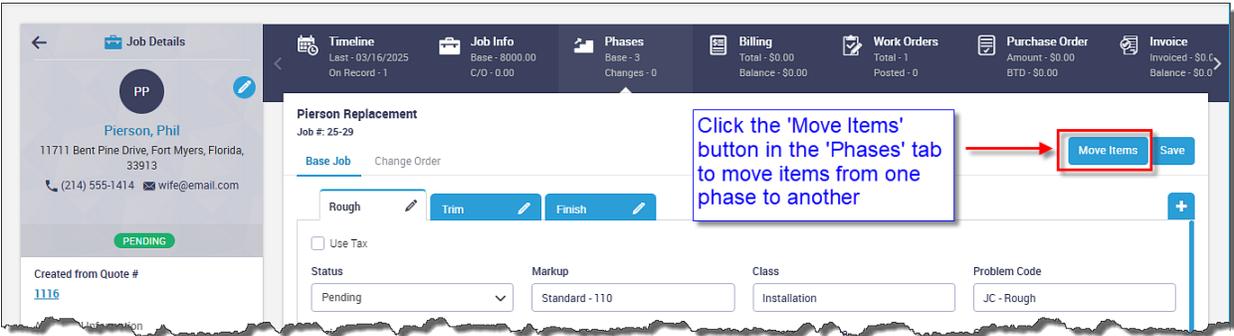
Job: Total - Open -

Access the 'Customer Billing Invoices' screen by clicking the 'Bill To Invoices' tab from the Customer Details Center or the Work Order Details Center.

Project Management – Ability to move items from one phase to another has been implemented

A new feature has been added to the Project Management Phase screen that will allow you to move items from one phase to another, prior to accepting the Job. In a prior release, we added the ability to create a Project Management Job from an accepted quote. If you elected to include the breakdown of items to be added to the job, as opposed to just the overall costs, all of the items were added to a single phase. This new feature will allow you to move the appropriate items from the initial phase to any additional phases you add to the Project. For example, you might have 50 items on a quote that turns into a Job, but you want 30 items to be in the initial phase, 15 items in a second phase and the remaining items in a 3rd phase. This new feature will allow you to quickly move the items from the initial phase to the newly added phases with the click of the mouse.

NOTE – If you elect to break down the items on a phase, they can be used on a Picking Slip to automatically be added to a cost Work Order or added to a Purchase Order via the Picking Slip option on the Work Order Invoice screen.



Timeline Last - 03/16/2025 On Record - 1

Job Info Base - 8000.00 C/O - 0.00

Phases Base - 3 Changes - 0

Billing Total - \$0.00 Balance - \$0.00

Work Orders Total - 1 Posted - 0

Purchase Order Amount - \$0.00 LTD - \$0.00

Invoice Invoiced - \$ Balance - \$

Pierson Replacement
Job #: 25-29

Base Job Change Order

Rough Trim Finish

Manual NO Prevailing Wage Task: OFF

	Subcontractor	Material	Labor	Hours	Misc.	Total
Estimated	\$0.00	\$489.20	\$0.00	0.00	\$0.00	\$489.20
Committed	\$0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00
JTD	\$0.00	\$0.00	\$0.00	0.00	\$0.00	\$0.00
Variance	\$0.00	\$489.20	\$0.00	0.00	\$0.00	\$489.20
% Complete	0.00	0.00	0.00	0.00	0.00	0.00%

The items selected will be removed (or reduced if you did not elect to move the full quantity) from the Source phase and added to the Destination phase.

Items

Item	Description	Qty	Cost (\$)	Ext. Cost (\$)	Rate (\$)	Amount (\$)	Class
Duct Transition for 10" Grill	Duct Transition Collar	12.00	13.35	160.20	28.43	341.16	
FLX004	8" R6 Flex Duct per ft	300.00	0.79	237.00	1.92	576.00	
FLX006	10" R6 Flex Duct	100.00	0.92	92.00	2.24	224.00	

+ Add Item Total Items Cost: \$489.20 Total Items Sell: \$1,141.16

Project Management – Ability to set a Phase as ‘Use Tax’ after job has been accepted has been implemented.

We have added the ability to change a Job Phase to Use Taxable after the Job has been accepted, in case you forgot to do it prior to accepting the Job. This will affect any unposted work orders when you post them.

Timeline Last - 02/27/2025 On Record - 7

Job Info Base - 7342.46 C/O - 0.00

Phases Base - 3 Changes - 0

Billing Total - \$7,592.46 Balance - \$7,592.46

Work Orders Total - 3 Posted - 0

Purchase Order Amount - \$308.00 LTD - \$239.00

Invoice Invoiced - \$ Balance - \$

Adams Replacement 2025
Job #: 25-22

Base Job Change Order

Rough Duct Work Finish

Use Tax

Status In Progress

Markup Standard - 110

Class Installation

Problem Code Search and select

Business Entity Res HVAC Retro

Estimated Start Date 02/24/2025

Estimated End Date 02/24/2025

Grouping Search and select

Manual NO Prevailing Wage Task: OFF

	Subcontractor	Material	Labor	Hours	Misc.	Total
Estimated	\$0.00	\$3,785.93	\$126.00	3.00	\$0.00	\$3,911.93

You can now change the Use Tax flag on a Phase or Change order after a Job has been accepted if you forgot to set the flag prior to accepting the Job.

Employee File – Department Field has been added

A new 'Department' field has been added to the Employee File. This will allow you to run the Employee Time Report for a specific department. This field is a free form field, meaning you can type anything in the field you want. For example, instead of just entering 'Service' for the department, you could enter something such as 'Service – Replacement', 'Service – Agreements', 'Service – HVAC', 'Service – Plumbing', etc. Then when you run the Employee Time Report, you can enter 'Service' for the Department and it will pick up all of the above. If you just want the 'Service – Replacement' department, you can type 'Service – Rep' and it will only pick up employee's assigned to 'Service – Replacement' department.

Another alternative would be entering a particular manager's name for the department. This would allow you to filter the Employee Time Report for the person responsible for reviewing their time. The same concept as above could be implemented, such as 'Jennifer – Service', 'Jennifer – Replacement', 'Jennifer – Agreements', etc.

The screenshot shows the 'Update Employee' form. A callout box with a blue border and white background contains the text: "Enter something in the Department field if you want to be able to run the Employee Time Report by a particular department". A red arrow points from this callout to the 'Department' field, which is highlighted with a red border and contains the text "Service - Replacement".

Update Employee

Employee Details Tech Pay Rates / Costs

EMPLOYEE INFORMATION

Name: Nate

Address: Address

Starting Location

Hire Date: Hire Date | Release Date: Release Date

Phone: Phone | Mobile: Mobile

Email: Eg. yourmail@mail.com | Display Name *: Nate

Default Class: Residential | Inventory Location: Truck 102

Review Link: <https://g.page/r/CWzk8X8Zqp3PEB0/review>

Review Text: Positive Review

Department: Service - Replacement

Weather Location

The screenshot shows the 'Employee Time Report' interface. A callout box with a blue border and white background contains the text: "You can now enter a 'Department' in the Employee Time Report filters to narrow down the results." A red arrow points from this callout to the 'Department' filter field in the sidebar, which is highlighted with a red border and contains the text "Service".

Employee Time Report

Sunday, March 16, 2025

3/10/2025 - 3/31/2025

Name	Date	Source	Class	Time Type	Start Time	End Time	Total Time	OT	DT	Post			
Drew	03/11/2025	WO-10864	Commercial	Working	2:19 PM	12:00 AM *	0:00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Drew	03/11/2025	WO-10728	Residential:Service	Travel	2:58 PM	3:05 PM	0:07	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Drew	03/11/2025	WO-10728	Residential:Service	Working	2:58 PM	12:00 AM *	0:00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
							RT: 0:07	OT: 0:00	DT: 0:00	Travel: 0:07	Working: 0:00	Idle: 0:00	Total: 0:07
James	03/10/2025	WO-11500	Residential:Maintenance	Travel	10:39 AM	4:39 PM	6:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
James	03/11/2025	WO-11530	Commercial	Travel	12:16 PM	1:16 PM	1:00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
James	03/11/2025	WO-11530	Commercial	Working	1:16 PM	1:18 PM	0:01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
James	03/12/2025	WO-11534	Residential:Service	Travel	10:37 AM	10:38 AM	0:01	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
James	03/12/2025	WO-11534	Residential:Service	Working	10:38 AM	10:42 AM	0:04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

FILTER BY Clear All

WORK DATE clear

Custom

From *: 03/10/2025 | To *: 03/31/2025

Employee: Search and select

Department: Service

ADDITIONAL SELECTIONS

Reports – Scheduled Calls Report - New field added to the Export

The salesperson has been added to the Scheduled Calls Report export.

Reports – Unassigned Calls Report – New field added to the Export

The salesperson has been added to the Unassigned Calls Report export.

Reports – Work Order Profitability Report – New fields added to the Export

The Phone number and the Mobile phone number associated with a Work Order have been added to the Work Order Profitability Export report.

Reports – COD Payment Report – New filter added and new field added to the export

A new 'Salesperson' filter has been added to the COD Payment Report and the salesperson has been added to the Export Report. The salesperson will be the salesperson assigned the invoice.

Reports – Project Management Profitability Report – New fields added to the export

The Estimated Subcontractor, Estimated Material, Estimated Labor, Estimated Hours and Estimated Other Cost fields and JTD Subcontractor, JTD Material, JTD Labor, JTD Hours and JTD Other Cost fields have been added to the Project Management Profitability Export report.

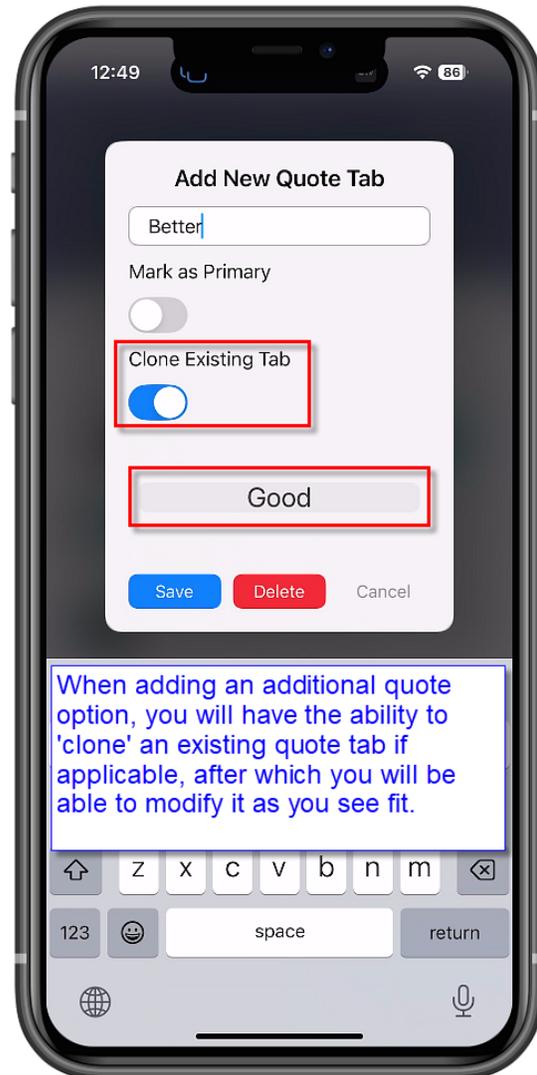
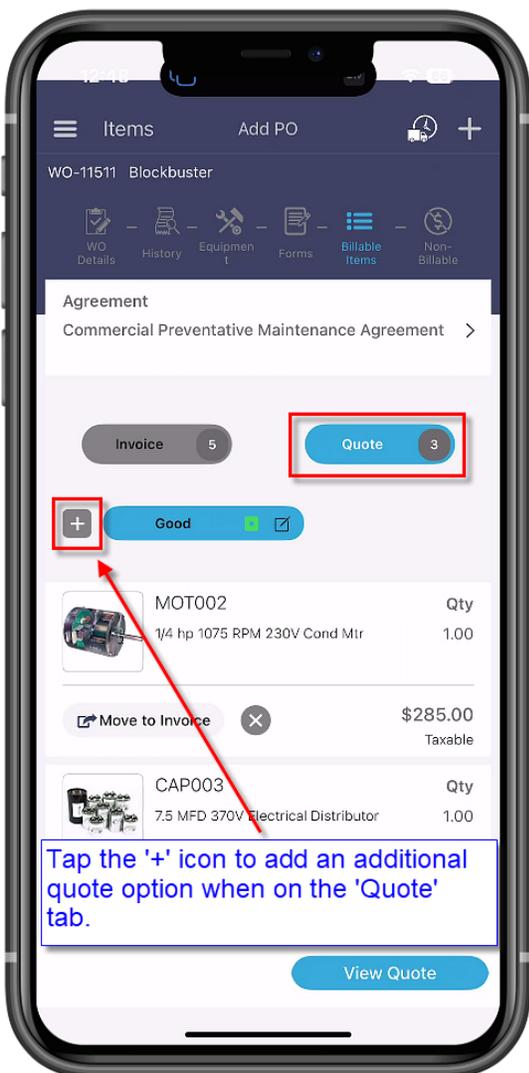
Reports – Employee Time Report – New field added to the filter and to the export

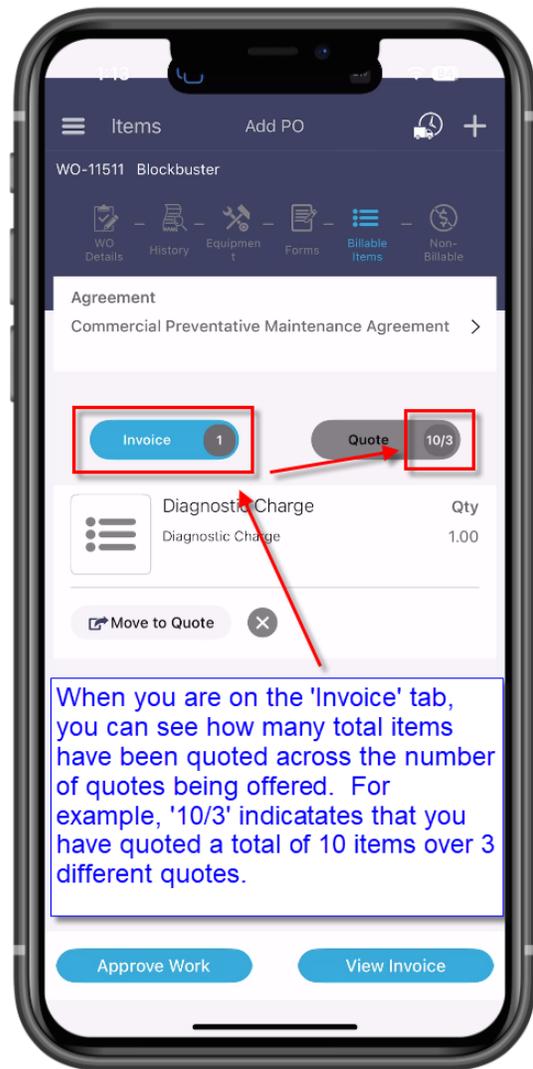
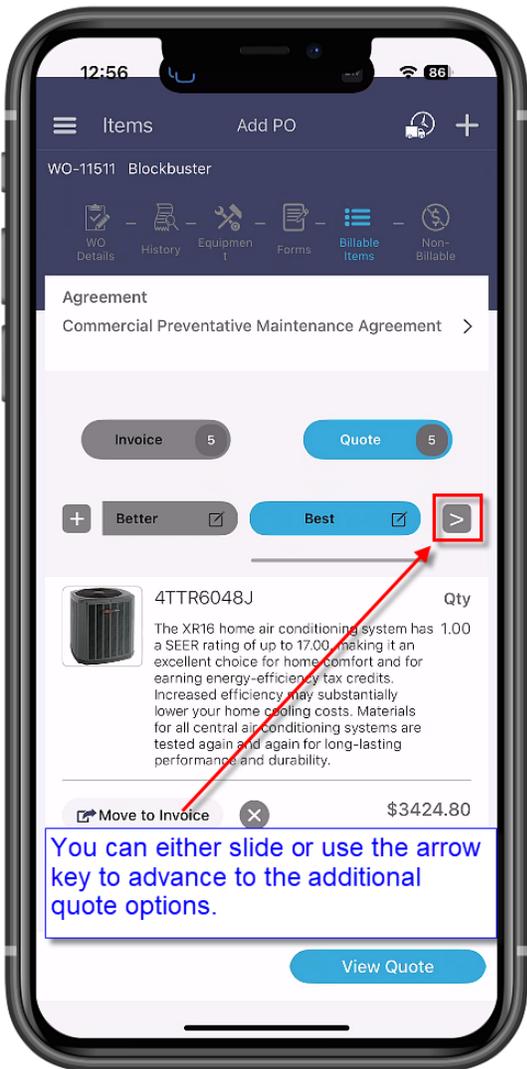
The 'department' field from the Employee File has been added as a filter to the Employee Time Report. The department will also be included in the Employee Time Report export.

SF Mobile – Multi Quote option has been added

The ability to offer multiple quotes has been added to SF Mobile. Prior to this release, you could add multiple quotes from the office, but in SF Mobile, it would only allow you to offer a single quote. You now have the ability to offer multiple quotes from SF Mobile.

When adding an additional quote, you will have the option to clone the prior quote tab. For example, if you are offering a 'Good, Better, Best' option, you can create the 'Good' quote and then clone it to the 'Better' tab and modify or add the additional items that make the quote 'better'. Then you can create the 'Best' tab and clone one of the prior tabs to the 'Best' tab and modify or add additional items to make it the 'Best' option. If the additional quote is going to be something completely different than the prior quotes, you can simply just add an additional tab and choose to NOT clone a prior tab.





SF Mobile – Ability to choose a ‘Package Item’

The new Package Item that was added to the system can be used in SF Mobile, either on the Invoice or on a Quote. Simply choose the Package Item and the system will automatically add all items associated with the package to the invoice. After the items have been added, you can edit the items as necessary.

