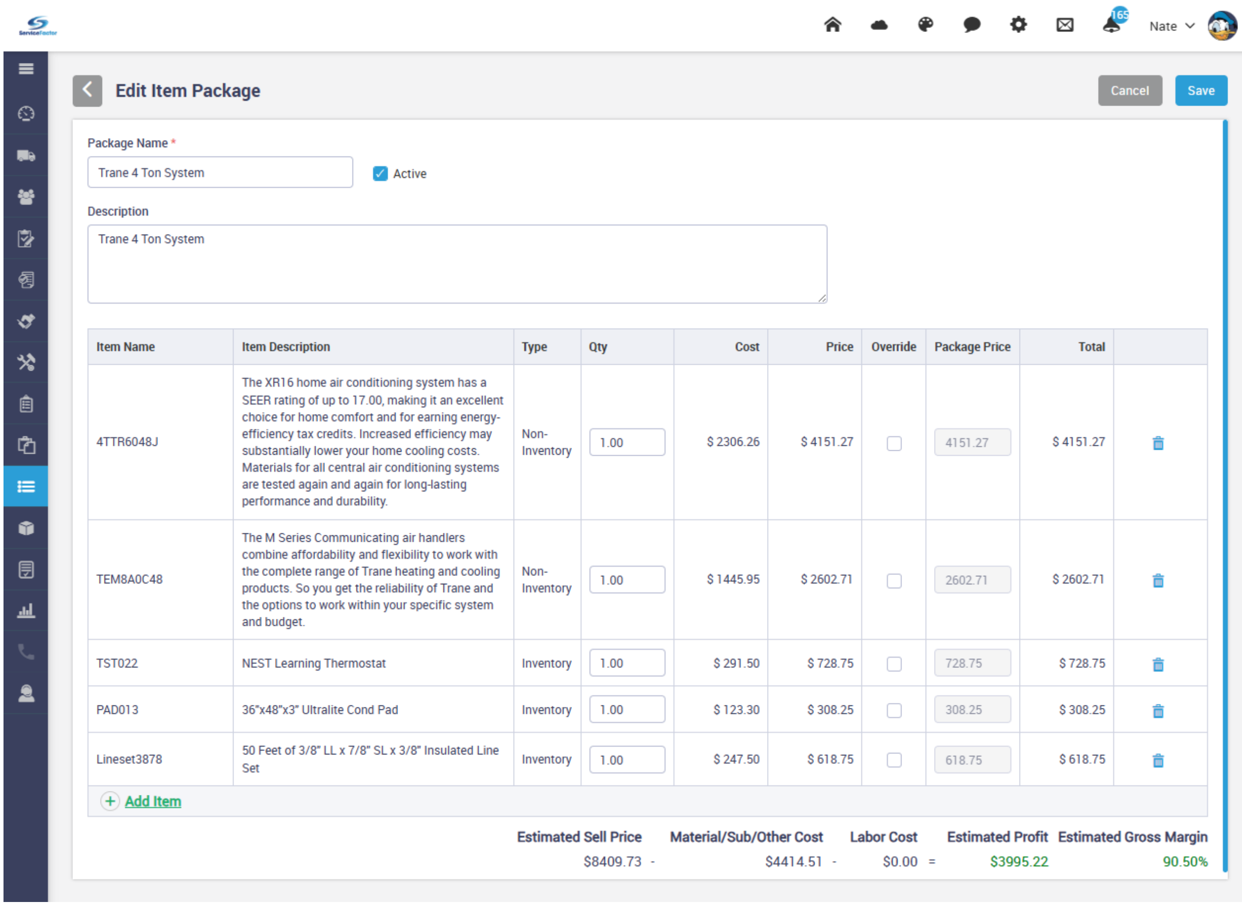
SF Release Notes: March 19, 2025

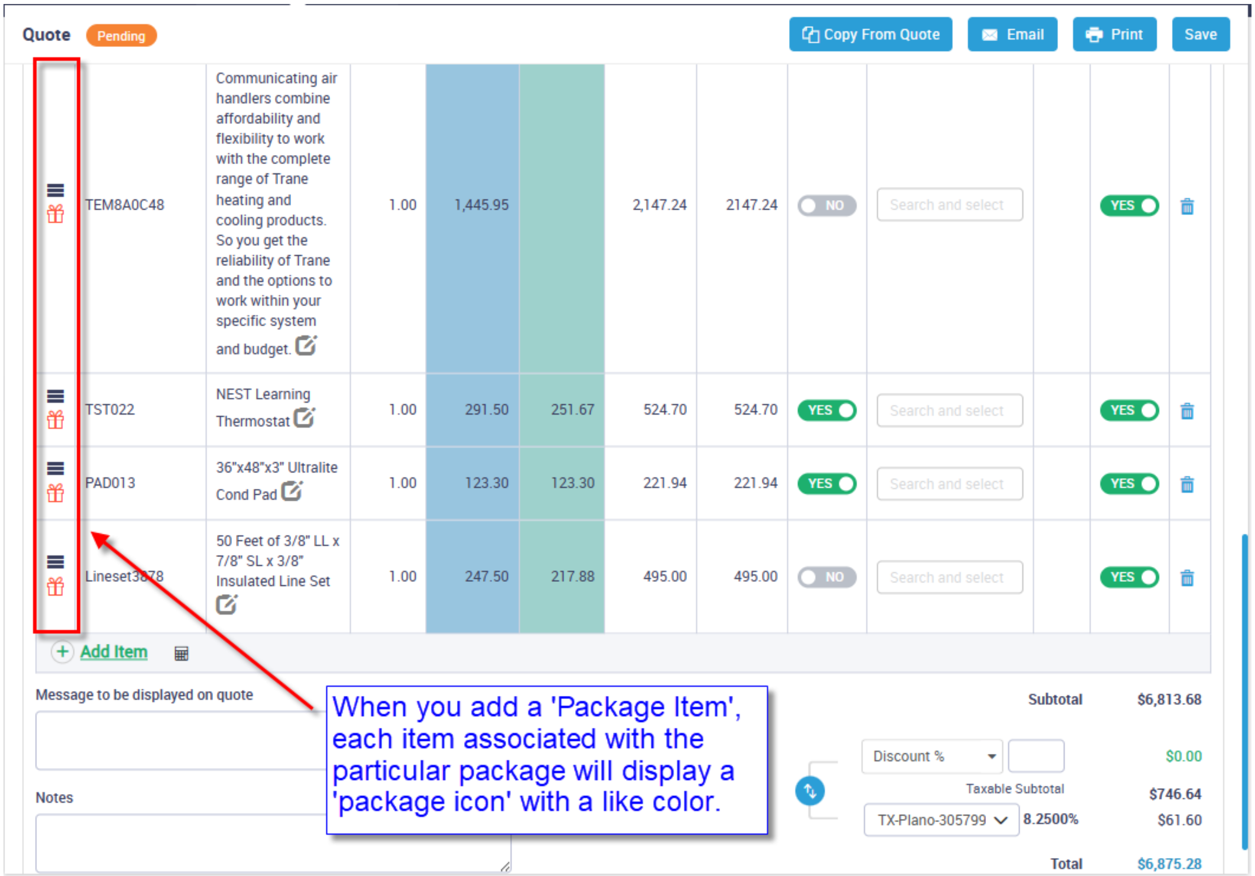
Package Items have been added to the system

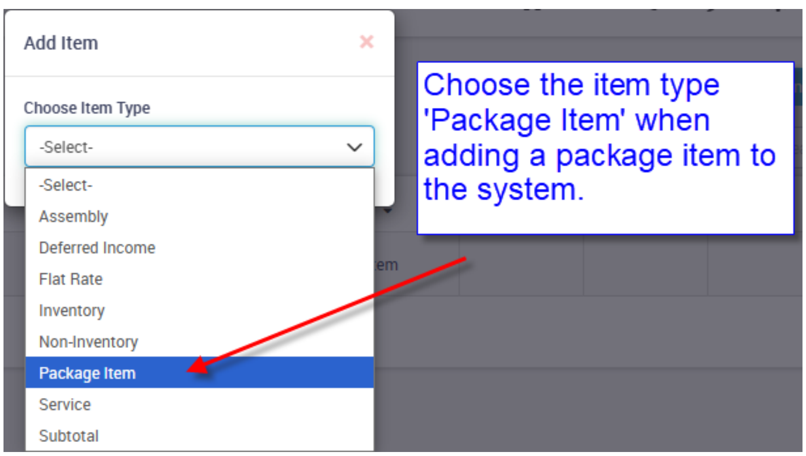
ServiceFactor now has a new item type called 'Package Item' that will allow you to group multiple items under one specific item name. When you choose a Package Item on a quote, invoice, job phase or purchase order, the system will automatically add all items associated with the Package Item to the appropriate 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.

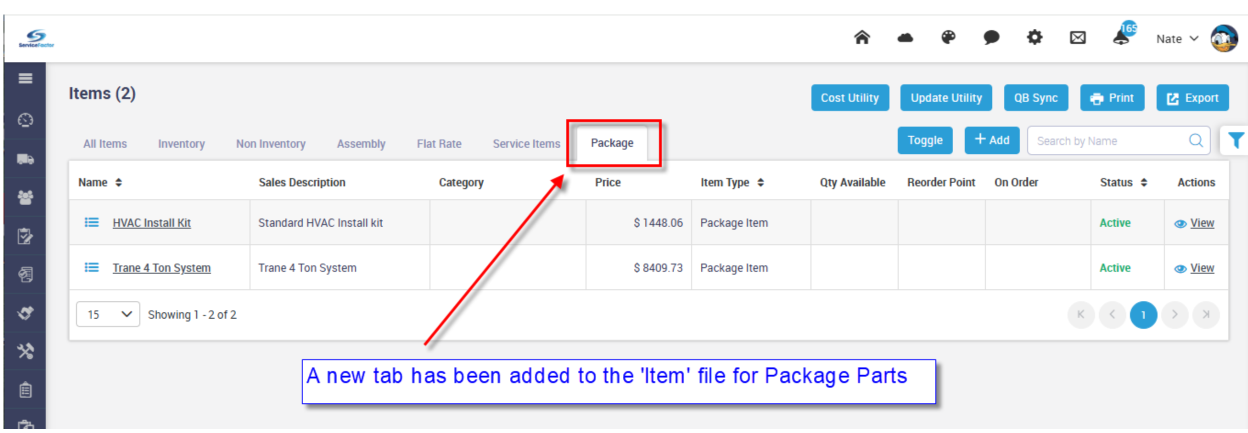
When a package item is selected, you will see a 'package icon' on each line for which an item was added from the package. All items from a particular package will have the same color icon. If you add multiple package items, each item from the various packages will have their own unique color. For example, 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.




Quote
Pending
Copy From Quote
Email
Print
Save
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
2147.24
NO
Search and select
YES
TST022
NEST Learning Thermostat
1.00
291.50
251.67
524.70
524.70
YES
Search and select
YES
PAD013
36"x48"x3" Ultralite Cond Pad
1.00
123.30
123.30
221.94
221.94
YES
Search and select
YES
Lineset3878
50 Feet of 3/8" LL x 7/8" SL x 3/8" Insulated Line Set
1.00
247.50
217.88
495.00
495.00
NO
Search and select
YES
Add Item
Message to be displayed on quote
Notes
When you add a 'Package Item', each item associated with the particular package will display a 'package icon' with a like color.
Subtotal
$6,813.68
Discount %
$0.00
Taxable Subtotal
$746.64
TX-Plano-305799
8.2500%
$61.60
Total
$6,875.28


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.

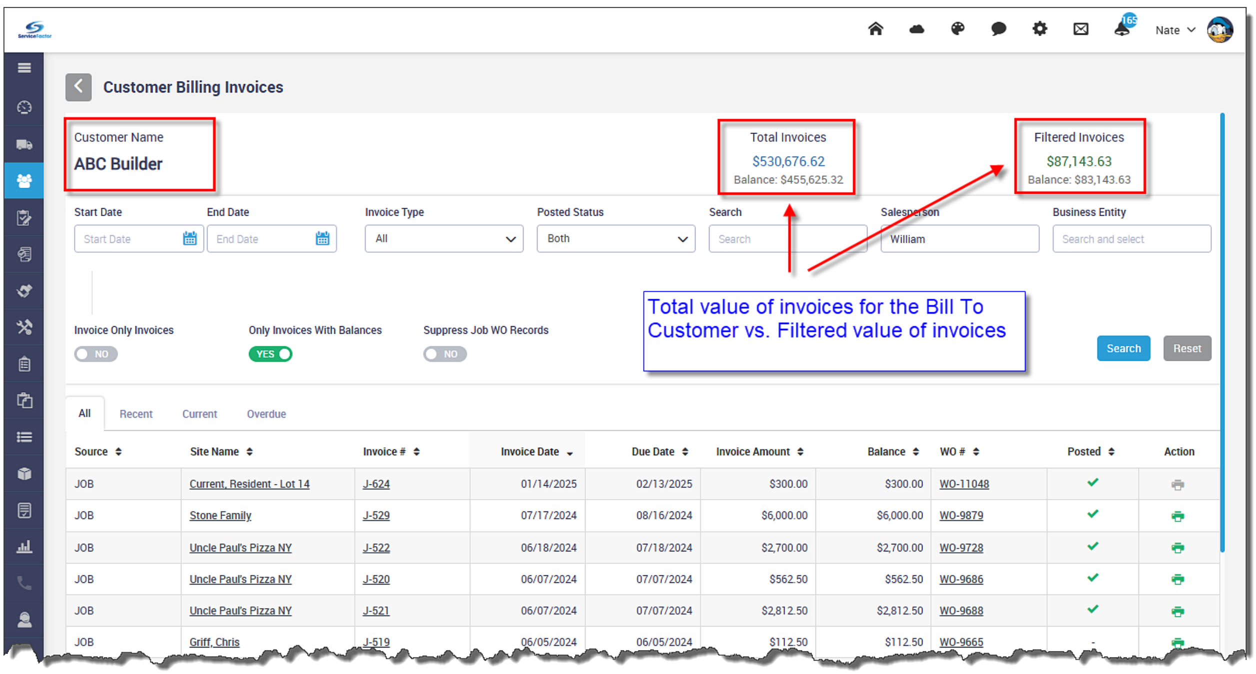

Nate
Items (2)
Cost Utility
Update Utility
QB Sync
Print
Export
All Items
Inventory
Non Inventory
Assembly
Flat Rate
Service Items
Package
Toggle
+ Add
Search by Name
Name
Sales Description
Category
Price
Item Type
Qty Available
Reorder Point
On Order
Status
Actions
HVAC Install Kit
Standard HVAC Install kit
$ 1448.06
Package Item
Active
View
Trane 4 Ton System
Trane 4 Ton System
$ 8409.73
Package Item
Active
View
15
Showing 1 - 2 of 2
A new tab has been added to the 'Item' file for Package Parts

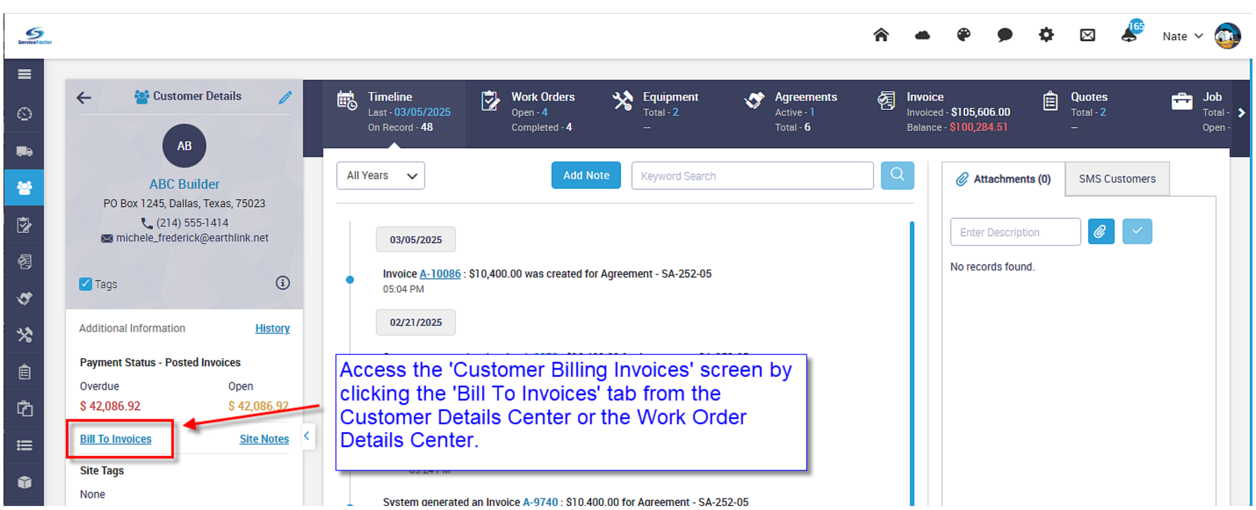
A new Customer Billing Invoices feature has been added

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.

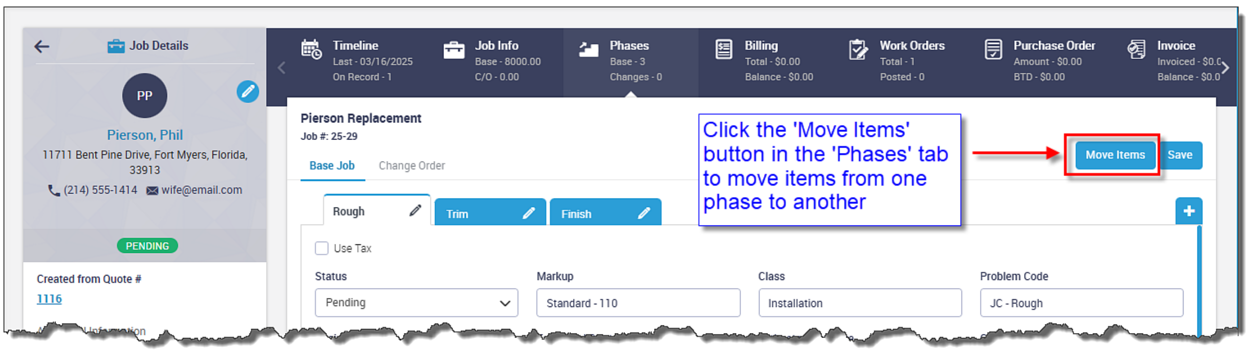


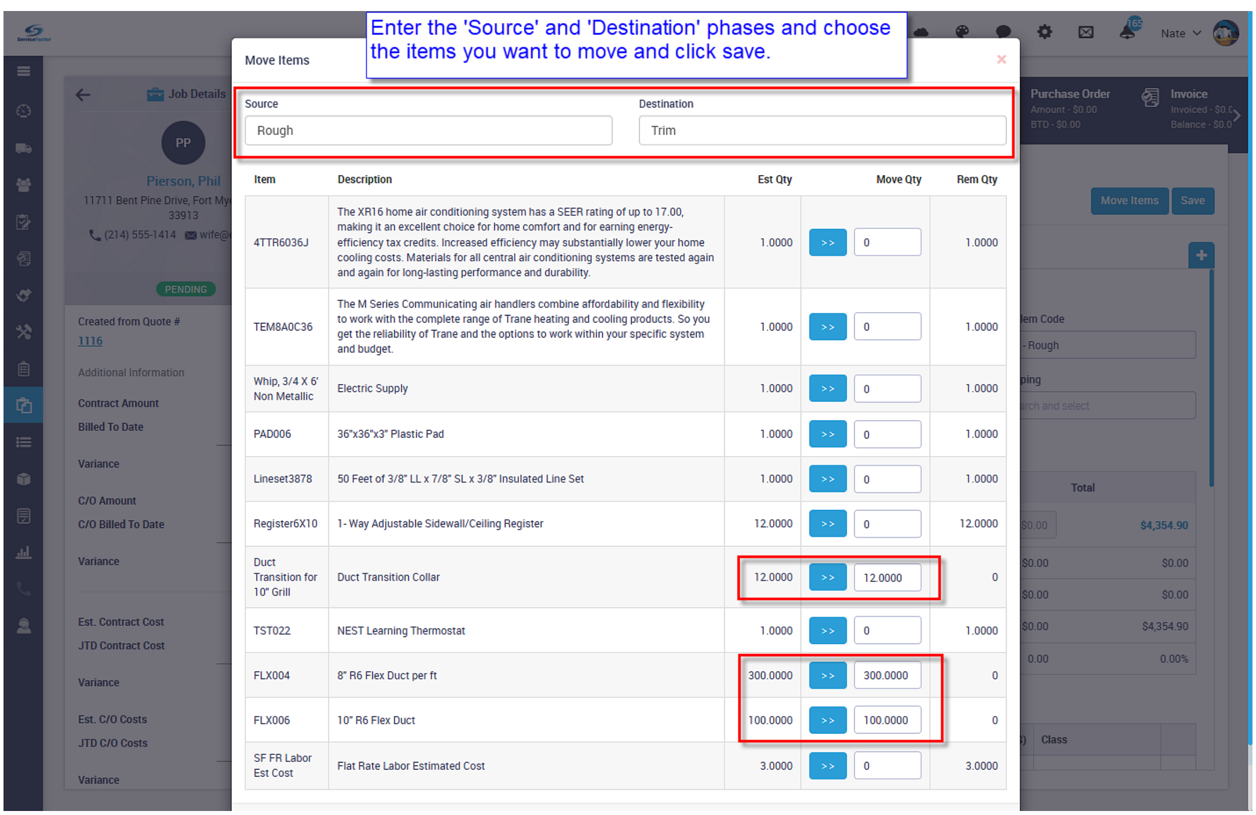


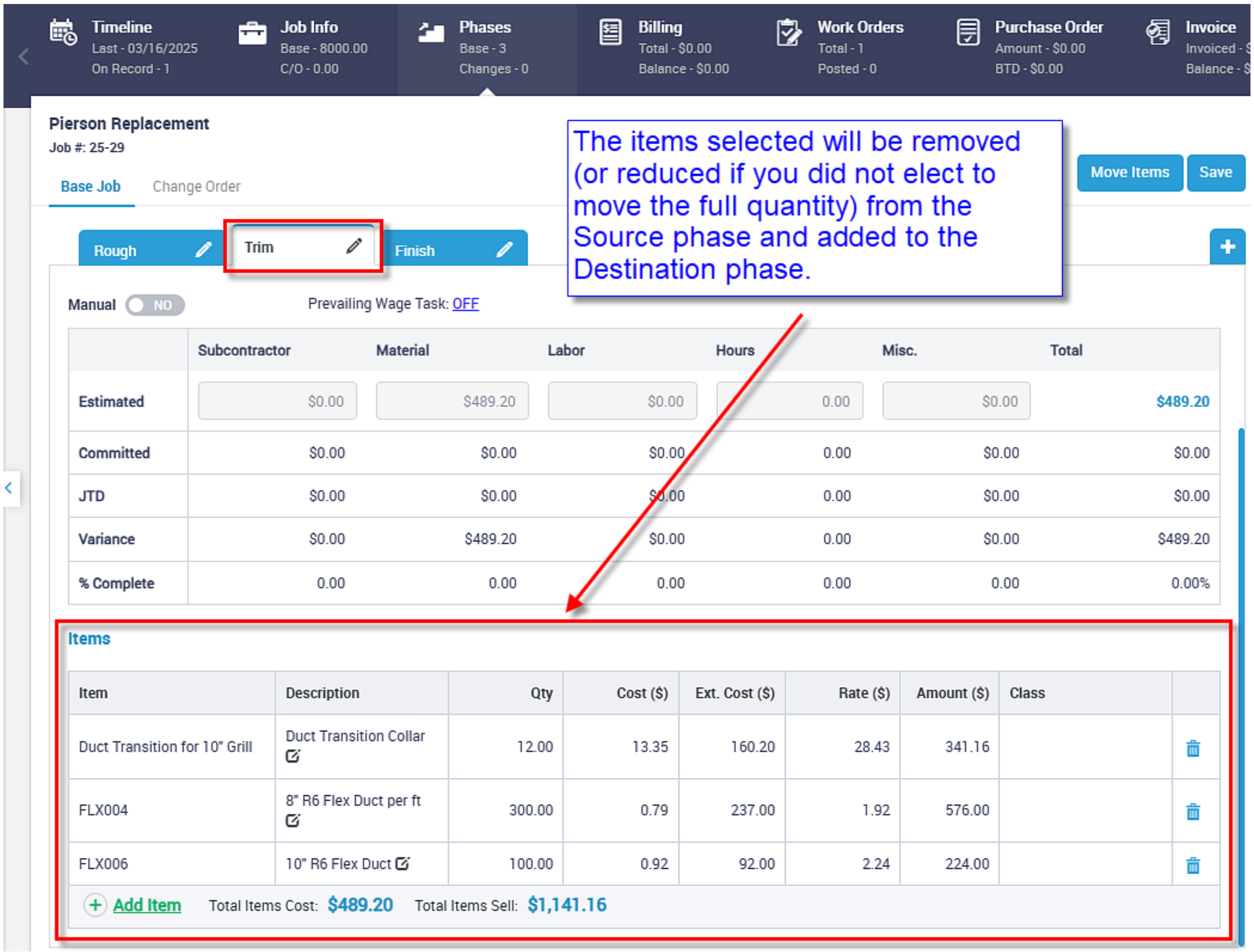
Project Management – Ability to move items from one phase to another has been implemented

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.

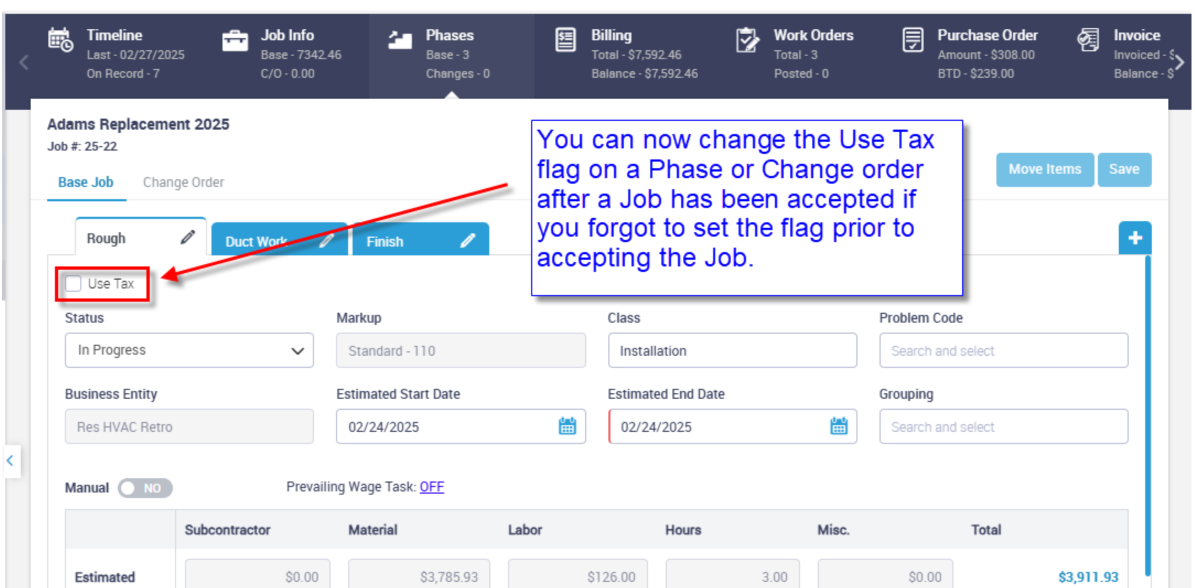






Project Management – Ability to set a Phase as ‘Use Tax’ after job has been accepted has been implemented.

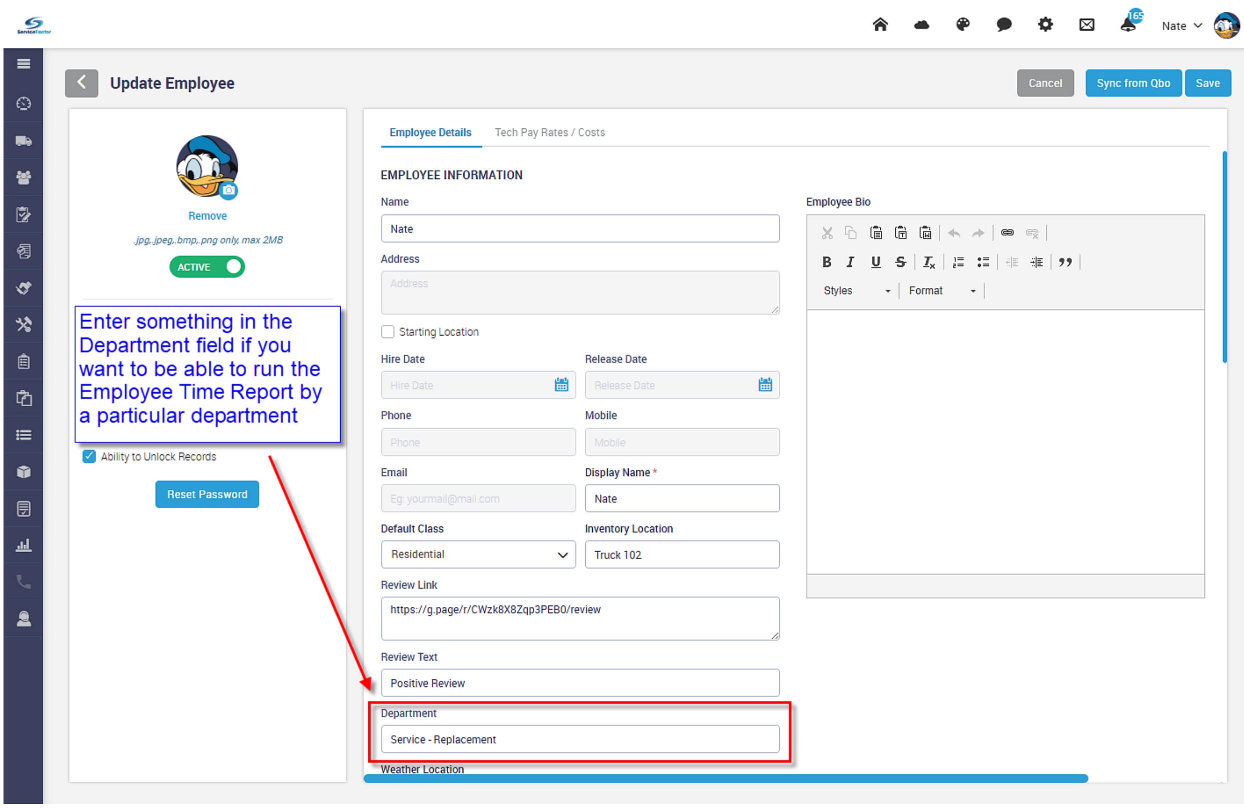
We have added the ability to change a Job Phase to Use Taxable after the Job has been accepted, in case you forgot to do it prior to accepting the Job. This will affect any unposted work orders when you post them.

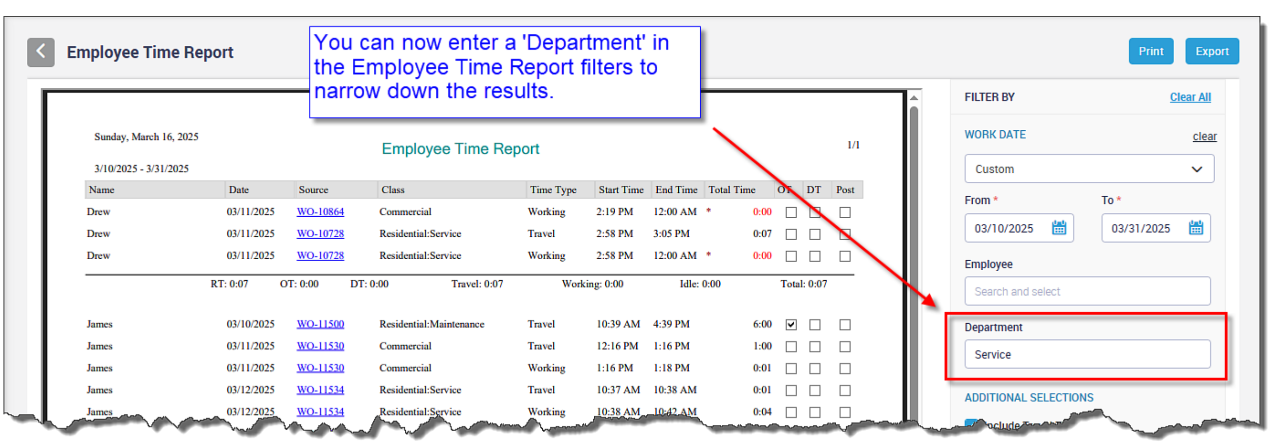


Employee File – Department Field has been added

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’, ‘Jenifer – Replacement’, ‘Jennifer – Agreements’, etc.





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

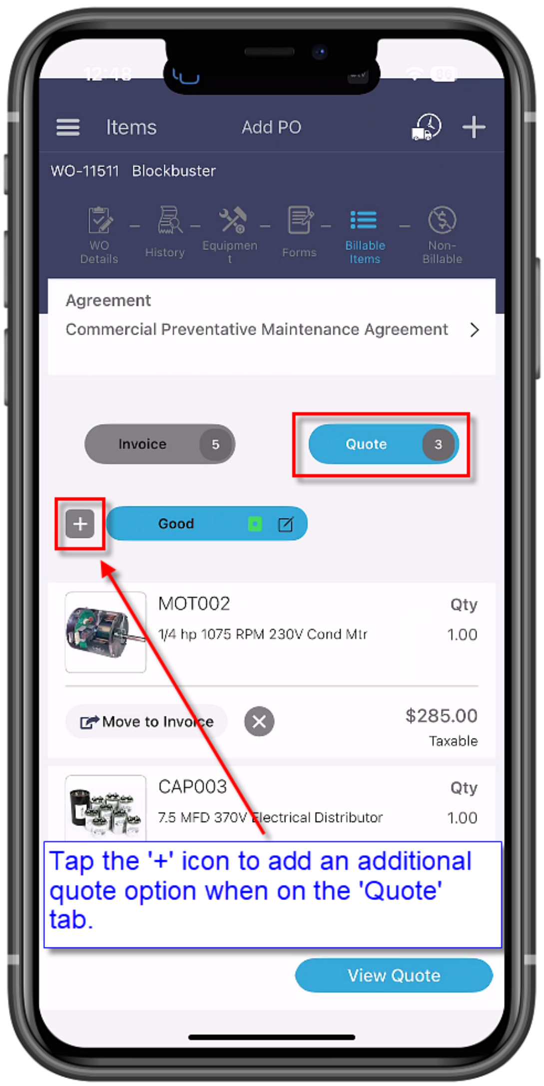
The Estimated Subcontractor, Estimated Material, Estimated Labor, Estimated Hours and Estimated Other Cost fields and JTD Subcontractor, JTD Material, JTD Labor, JTD Hours and JTD Other Cost fields have been added to the Project Management Profitability Export report.

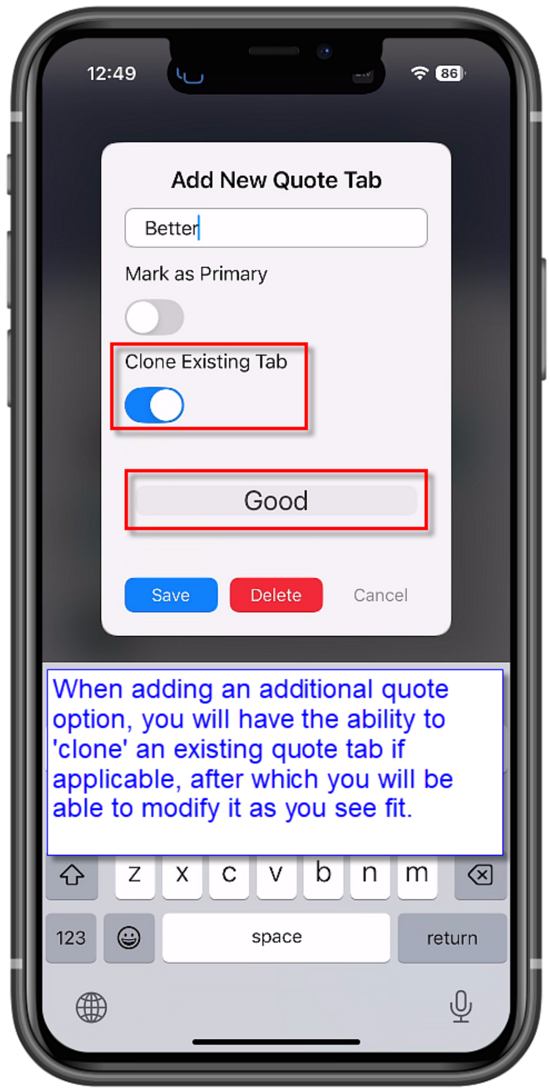
Reports – Employee Time Report – New field added to the filter and to the export

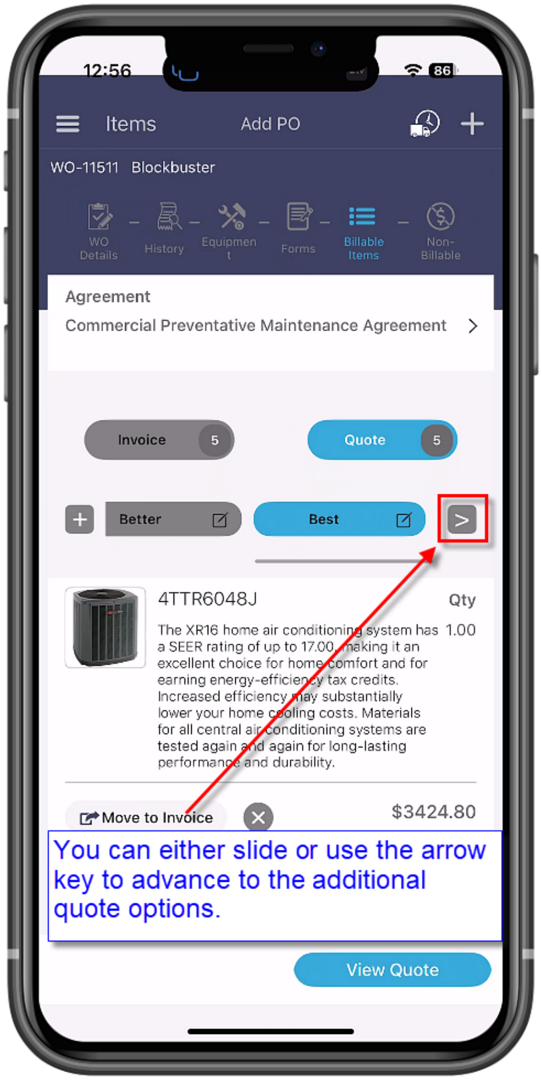
The ‘department’ field from the Employee File has been added as a filter to the Employee Time Report. The department will also be included in the Employee Time Report export.

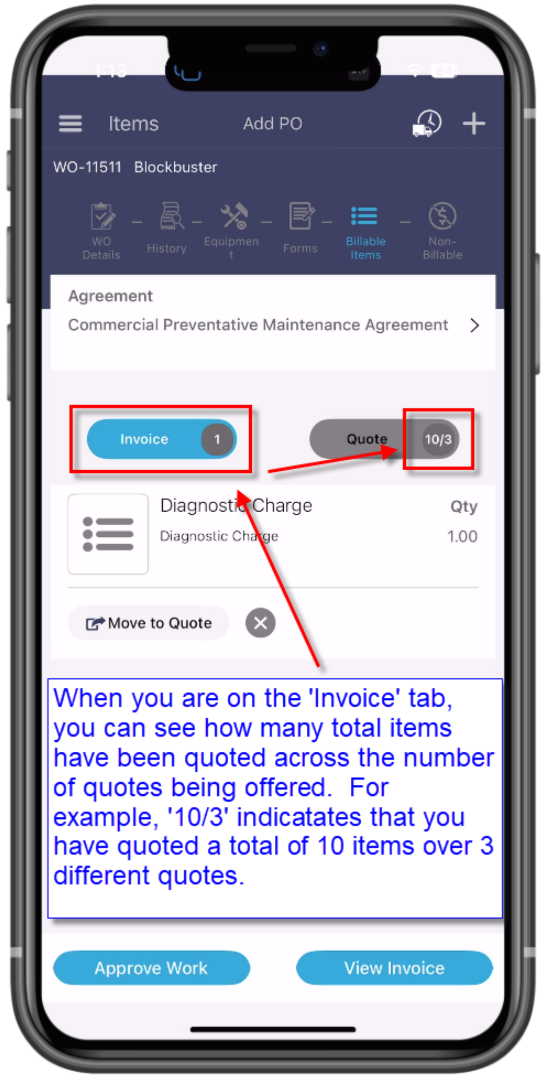
SF Mobile – Multi Quote option has been added

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.






12:56
Items
Add PO
WO-11511 Blockbuster
WO Details
History
Equipment
Forms
Billable Items
Non-Billable
Agreement
Commercial Preventative Maintenance Agreement
Invoice 5
Quote 5
Better
Best
>
4TTR6048J
Qty
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.
1.00
Move to Invoice
$3424.80
You can either slide or use the arrow key to advance to the additional quote options.
View Quote


Items
Add PO
WO-11511 Blockbuster
WO Details
History
Equipment
Forms
Billable Items
Non-Billable
Agreement
Commercial Preventative Maintenance Agreement
Invoice 1
Quote 10/3
Diagnostic Charge
Qty
Diagnostic Charge
1.00
Move to Quote
When you are on the 'Invoice' tab, you can see how many total items have been quoted across the number of quotes being offered. For example, '10/3' indicatates that you have quoted a total of 10 items over 3 different quotes.
Approve Work
View Invoice

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.