

SF Release Notes: July 17, 2025

Work Order Invoice – Location Quantity is now being displayed in the Item Lookup Screen

When adding an inventory item in the Work Order Invoice Screen, you can now see the quantity available in the selected location. If you click on the Quantity Available, you can see the quantity available in all inventory locations.

Item Search

Item Location: Main

Search All Items: mot00

Items	Location Quantity	Recommended Items
MOT002 1/4 hp 1075 RPM 230V Cond Mtr	4.00	0 1 0
MOT0025 Condenser Motor - 1/3 to 1/6 HP 208-230/1/60 (1075 rpm/1 speed)	3.00	2 1 2
MOT003 1/3 hp 1075 RPM 230V Cond Mtr	4.00	0 1 0
MOT004 Condenser Motor - 1 Year Parts & Labor Warranty	5.00	0 1 0
MOT005 Generic Fancy ODU Cond Mtr	1.00	0 1 0
MOT006	12.00	0 1 0

When searching for an inventory item in the Work Order Invoice Screen, you can now see the quantity available in the selected location. Click on the Quantity to view the quantity available at all locations to which the item has been assigned

Item Distribution: MOT006

Location	Bin Location	Qty Available	On Order
Main		12.00	0
Truck 101		2.00	0
Truck 102		1.00	0
Truck 103		1.00	0
Truck 100		2.00	0
Truck 105		2.00	1
Truck 106		2.00	0
Truck 107		0.00	0

Clicking on the Quantity Field in the Item Search Screen will display the quantity and the quantity on order for

Purchase Orders – Ability to Suppress Pricing when printing / emailing a PO

A new slider has been added to the Purchase Order file that will allow you to suppress the pricing when printing or emailing a Purchase Order.

Purchase Order - PO-1661

Purchase Order | Receiving Slip

Email | Print

Ordered By: Sharon | Created On: 02/20/2025 | Last Date Changed: 03/11/2025 | Billed to Date: \$0.00

Purchase Order #: PO-1661 | PO Date: 02/20/2025 | Expected Delivery Date: 02/20/2025 | Ship to: Don't Print | Status: Partial Received

PO Type: Inventory | Location / Job / Work Order: Truck 104 | Phase / Change Order: Search and select | Work Order:

Preferred Vendor: Johnstone Supply | Email: wmosborn@me.com | Markup: Select | Class:

Notes:

Print Manufacturer's Part #: YES | No Charge: NO | Mark PO as Void: NO | Use Cost from Item File for Markup?: NO | **Suppress Pricing on Print: YES**

Item	Description	Order Qty	Total Received	Rate	Amount	Unit Sell
BLT001	3L Type 36" Length	3.00	1.00	5.9900	\$17.9700	0

Cancel | Save | Save & Receive

ServiceFactor

AA Service
11928 Fairway Lakes Drive
Fort Myers, FL 33913
(817) 881-3949
sales@teamservice.com

Purchase Order

Purchase Order Date: 02/20/2025
Purchase Order Number: PO-1661
Expected Delivery Date: 02/20/2025

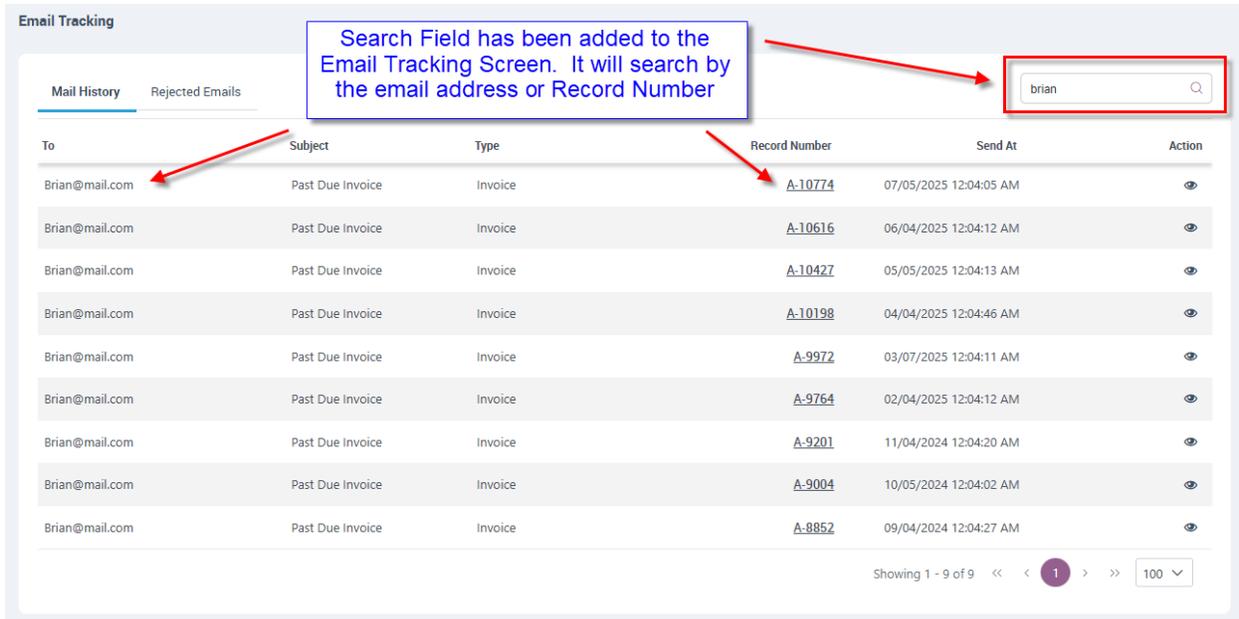
Vendor		Information	
Johnstone Supply 1307 N Watters Rd Allen, TX 75013 (214) 555-4747 wmosborn@me.com		Inventory Location	Truck 104

Item	Description	Qty		
BLT001	3L Type 36" Length	3.00		
CAP006	15 Mfd 370V Premium Capacitor	3.00		
FLT2020	20 X 20 X 1 Disposable Filter Mfg Part #: APRL2020	3.00		
TST022	NEST Learning Thermostat Mfg Part #: 123475	3.00		

Pricing has been suppressed on this Purchase Order

Email Tracking – A Search field has been added

A Search field has been added to the Email Tracking screen, allowing the ability to search by the email address or Record Number (WO Number, Invoice Number, Quote Number, Job Number, etc.). This will allow you to quickly search for a specific email.



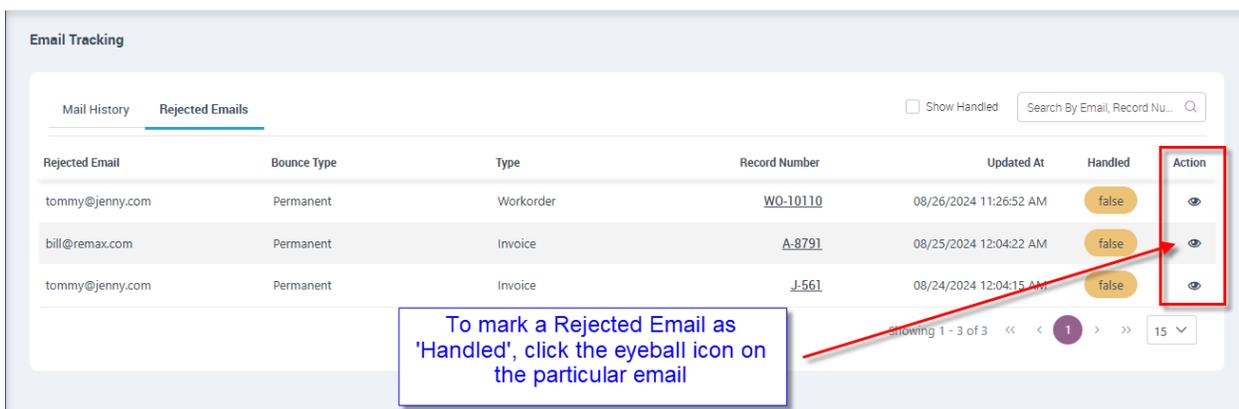
The screenshot shows the 'Email Tracking' interface with the 'Rejected Emails' tab selected. A search field at the top right contains the text 'brian'. A blue callout box points to the search field with the text: 'Search Field has been added to the Email Tracking Screen. It will search by the email address or Record Number'. Red arrows also point from the callout box to the 'To' and 'Record Number' columns of the table below.

To	Subject	Type	Record Number	Send At	Action
Brian@mail.com	Past Due Invoice	Invoice	A-10774	07/05/2025 12:04:05 AM	👁
Brian@mail.com	Past Due Invoice	Invoice	A-10616	06/04/2025 12:04:12 AM	👁
Brian@mail.com	Past Due Invoice	Invoice	A-10427	05/05/2025 12:04:13 AM	👁
Brian@mail.com	Past Due Invoice	Invoice	A-10198	04/04/2025 12:04:46 AM	👁
Brian@mail.com	Past Due Invoice	Invoice	A-9972	03/07/2025 12:04:11 AM	👁
Brian@mail.com	Past Due Invoice	Invoice	A-9764	02/04/2025 12:04:12 AM	👁
Brian@mail.com	Past Due Invoice	Invoice	A-9201	11/04/2024 12:04:20 AM	👁
Brian@mail.com	Past Due Invoice	Invoice	A-9004	10/05/2024 12:04:02 AM	👁
Brian@mail.com	Past Due Invoice	Invoice	A-8852	09/04/2024 12:04:27 AM	👁

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Email Tracking – Rejected Emails can be marked as “Handled”, which will suppress them from the Rejected Emails list.

You now have the option to mark a Rejected Email as ‘Handled’ and enter a note as to how the rejected email was handled. ‘Handled’ emails will be suppressed from appearing in the Rejected Emails list by default, but can be displayed by placing a check mark in the ‘Show Handled’ check box. To enter a note and mark the email as ‘Handled’, click the “eyeball” icon in the Rejected Email List. NOTE – To view notes on ‘Handled’ emails, click the eyeball icon again in the ‘Action’ column.



The screenshot shows the 'Email Tracking' interface with the 'Rejected Emails' tab selected. A 'Show Handled' checkbox is visible at the top right. A search field contains the text 'Search By Email, Record Nu...'. A blue callout box points to the 'Action' column of the table below with the text: 'To mark a Rejected Email as 'Handled', click the eyeball icon on the particular email'. Red arrows also point from the callout box to the 'Handled' and 'Action' columns of the table.

Rejected Email	Bounce Type	Type	Record Number	Updated At	Handled	Action
tommy@jenny.com	Permanent	Workorder	WO-10110	08/26/2024 11:26:52 AM	false	👁
bill@remax.com	Permanent	Invoice	A-8791	08/25/2024 12:04:22 AM	false	👁
tommy@jenny.com	Permanent	Invoice	J-561	08/24/2024 12:04:15 AM	false	👁

Showing 1 - 3 of 3 << < 1 > >> 15 ▾

Rejected Email ×

To: bill@remax.com
Email Body
 Dear Jill,

This is a friendly reminder that your invoice A-8791 is approaching its due date. If you have any questions, please do not hesitate to contact the office, otherwise prompt payment is appreciated. For your convenience, we take all Major Credit Cards

Proceed to Payment

Sincerely,

Your AA Service Team!

Note

Had the wrong email address. Corrected the email address in the customer file and resent the message.

Handled
 YES

Last Updated: 08/25/2024 12:04:22 AM
Changed By:

Enter a note if applicable and then turn the 'Handled' slider to 'Yes' and then click Save

Email Tracking

Mail History Rejected Emails Show Handled Search By Email, Record Nu... Q

Rejected Email	Bounce Type	Type	Record Number	Updated At	Handled	Action
tommy@jenny.com	Permanent	Workorder	<u>WO-10110</u>	08/26/2024 11:26:52 AM	false	👁
bill@remax.com	Permanent	Invoice	<u>A-8791</u>	08/25/2024 12:04:22 AM	true	👁
tommy@jenny.com	Permanent	Invoice	<u>J-561</u>	08/24/2024 12:04:15 AM	false	👁

Showing 1 - 3 of 3 << < 1 > >> 15 ▾

After setting a Rejected Email to Handled, it will show 'Yes' under the 'Handled' column until you exit out.

Email Tracking

Place a 'check mark' in the 'Show Handled' check box to display any 'Rejected Emails' that have been marked as 'Handled'

Mail History Rejected Emails Show Handled Search By Email, Record Nu... Q

Rejected Email	Bounce Type	Type	Record Number	Updated At	Handled	Action
tommy@jenny.com	Permanent	Invoice	<u>J-561</u>	07/15/2025 03:47:10 PM	false	👁
bill@remax.com	Permanent	Invoice	<u>A-8791</u>	07/15/2025 03:46:54 PM	true	👁
tommy@jenny.com	Permanent	Workorder	<u>WO-10093</u>	07/08/2025 11:03:24 AM	true	👁
billy@me.com	Transient	Workorder	<u>WO-10112</u>	07/08/2025 10:57:51 AM	true	👁
billy@me.com	Transient	Workorder	<u>WO-10112</u>	05/28/2025 11:34:16 AM	true	👁
jenny@mail.com	Permanent	Agreement	<u>SA-597-02</u>	05/28/2025 11:32:59 AM	true	👁
tommy@jenny.com	Permanent	Workorder	<u>WO-10110</u>	08/26/2024 11:26:52 AM	false	👁

Showing 1 - 7 of 7 << < 1 > >> 15 ▾

Invoice Listing – The ability to search by ‘Bill To’ Name has been added to the Advanced Filters

A new Advanced Filter has been added to search by the Bill To customer. The search field is looking for a ‘Partial Match’ as opposed to an exact match. For example, if you type ‘Smith’ in the field, the system will display any Bill To customer with the name Smith. However, if you type ‘Smith, Mike’, it will only return the specific customer. This makes it very flexible, but may display more records than you want if you have a broad search.

The screenshot shows the 'All Invoices (273)' page. A search filter 'smith' is applied. A table lists invoices with columns for Invoice #, Site Name, WO #, PO #, Invoice Date, Due Date, Total, Balance, and Technician. A blue callout box points to the 'Bill To' field in the right-hand filter panel, which contains the text 'smith'.

Invoice #	Site Name	WO #	PO #	Invoice Date	Due Date	Total	Balance	Technician
F-10767	Smith, Jason	WO-12262		06/23/2025	06/23/2025	\$372.00	\$372.00	Billy Bob
A-10896	Smith, Mike 11721	WO-12396		07/11/2025	07/11/2025	\$13.86	\$13.86	
A-10764	Smith, Randy	WO-12259		06/21/2025	06/21/2025	\$26.56	\$26.56	
A-10835	Smith, Sara	WO-12335		07/01/2025	07/01/2025	\$25.00	\$25.00	
A-10676	Smith, Sara	WO-12167		06/01/2025	06/01/2025	\$25.00	\$25.00	
A-10507	Smith, Sara	WO-11969		05/01/2025	05/01/2025	\$25.00	\$25.00	
A-10312	Smith, Sara	WO-11735		04/01/2025	04/01/2025	\$25.00	\$25.00	
A-10295	Smith, Jennifer	WO-11718				\$85.00		
A-10063	Smith, Sara	WO-11462				\$25.00		
A-10432	Smith, Mike	WO-11890				\$292.88		
A-10316	Smith, Joe	WO-11739				\$249.99		
F-10625	Smith, Jennifer	WO-12117				\$11,640.91		Nate
A-10723	Smith, Mike 11721	WO-12217				\$13.86		
A-10597	Smith, Randy	WO-12078		05/21/2025	05/21/2025	\$26.56	\$26.56	
F-10601	Smith, Sally	WO-12083		05/21/2025	05/21/2025	\$556.48	\$20.82	Allen Johnson

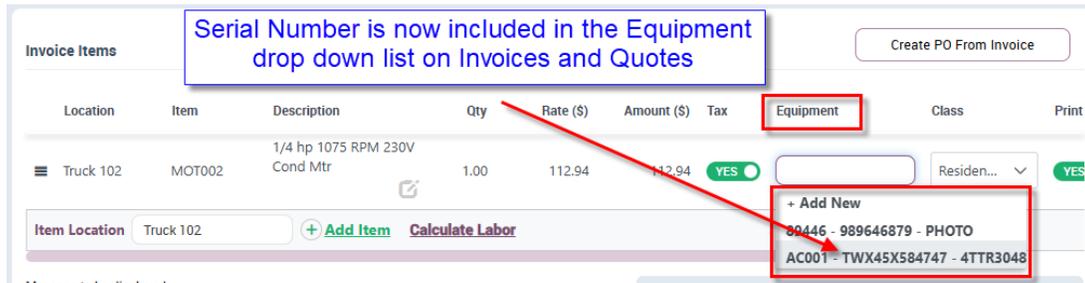
Customer File – Bill To Invoices balance has been added to the Additional Information Section

In the last release, we added a new ‘Bill To Invoices’ link that allows you to view all the invoices for a particular Bill To customer. This release we have added the Bill To open balance to the Additional Information section, allowing you to quickly see if the Bill To customer has an open balance. The value under the ‘Invoice’ Tab is for the selected site, NOT the Bill To balance. Prior to this release, you would have to click on the ‘Bill to Invoices’ link to see if there was a balance.

The screenshot shows the 'Customer Details' page for 'ABC Builder'. The 'Additional Information' section is expanded to show 'Bill To Invoices' with a balance of \$648,682.91. The 'Invoice' tab at the top right shows an 'Invoice Invoiced' of \$105,606.00 and a 'Balance' of \$180,284.51. A blue callout box explains that the 'Bill To Invoices' balance is the outstanding amount for all invoices billed to the customer, while the 'Invoice' tab shows the balance for the selected site.

Invoice / Quotes – The Serial Number has been added to the Equipment Dropdown List

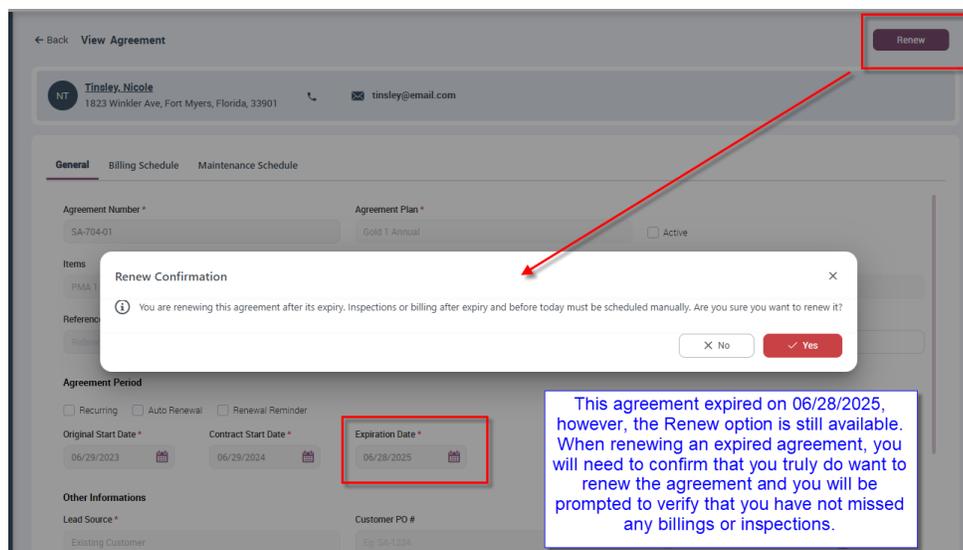
The Serial Number has been added to the Equipment Drop Down list when adding an item to an Invoice or Quote. Prior to this release, the dropdown showed the Equipment ID and the Model Number. Now the dropdown will show the Equipment ID, Model Number and Serial Number. This will make it easier to select the proper piece of equipment if the customer has several of the same equipment model on their site.



Service Agreements – Ability to Renew a Service Agreement after it has expired

We have added the ability to renew a Service Agreement after it has expired as long as it falls within 30 days of the expiration date. Prior to this release, the renewal option only worked if the agreement was still active. When the agreement renews, it will renew based on the same dates as the prior year, but with the current year's date. For example, if you had an agreement that was active from July 08, 2024 to July 07, 2025 and it expires, you can renew it up until August 6, 2025. When it is renewed, it will use the dates of July 08, 2025 – July 07, 2026.

If you renew an agreement after it has expired, you will receive a confirmation that states 'You are renewing this agreement after its expiry. Inspections or billing after expiry and before today must be scheduled manually. Are you sure you want to renew it? Y/N? Be sure that you check the Billing and Inspections dates so that you do not miss a billing or inspection that should have happened prior to the date the agreement was renewed.'



Project Management – You can now mark a Phase or Change Order as Use Taxable after the Job or Change Order has been accepted

You now have the option to add a Use Tax region after a Job has been accepted if you forgot when setting up the Job. If you have any phases that you forgot to mark as Use Tax, you can now mark them as Use Tax after the job has been accepted and even after a Work Order has been created. However, if you have previously posted a Job Work Order prior to marking the phase to which it is associated as Use Taxable, that particular work order will not be included on the Project Management Use Tax Report. If you change the Use Tax after a Job has been accepted, the system will create a timeline entry letting you know who and when the phase's use tax flag was activated.

NOTE – If you forgot to enter a Use Tax region (on the Job Info Screen) prior to accepting the Job, you will be able to enter a Use Tax region as long as the Use Tax field is blank on an accepted job. Once a use tax region is selected and a job has been accepted, you will not be able to change the Use Tax region.

The screenshot shows the 'New Install' job screen for Job #: 25-55. The top navigation bar includes sections for Timeline, Job Info, Phases, Billing, Work Orders, Purchase Order, and Invoice. The 'Phases' section is highlighted, showing 'Base - 2' and 'Changes - 0'. Below the navigation bar, the 'Installation' phase is selected. A red box highlights the 'Use Tax' checkbox, which is currently unchecked. A red arrow points from a text box to this checkbox. The text box contains the text: 'You now have the ability to activate use tax for a phase after the job has been accepted.' Below the checkbox, there are fields for Status (In Progress), Markup, Class, Problem Code, Business Entity, Estimated Start Date (06/12/2025), Estimated End Date (06/20/2025), and Grouping. At the bottom, there is a table with columns for Subcontractor, Material, Labor, Hours, Misc., and Total.

The screenshot shows the timeline for Job #: 25-55. The top navigation bar includes sections for Timeline, Job Info, Phases, Billing, and Work Orders. The 'Timeline' section is highlighted, showing 'Last - 07/15/2025' and 'On Record - 7'. Below the navigation bar, there is a search bar and an 'Add Note' button. The timeline shows a note on 07/15/2025 at 01:56 PM, stating: 'Use tax was activated for Phase: Equipment'. A red arrow points from a text box to this note. The text box contains the text: 'If you change a phase or change order to Use Taxable after the job or Change Order has been accepted, a Timeline entry will be created.' Below the note, there is another date entry for 07/02/2025.

Project Management – You can now add a Direct Charge for Labor costs and NOT have it affect the JTD Hours

You can now add a Direct Charge for Labor Costs and opt to NOT add a quantity to the JTD Hours. When adding a Direct Charge for any Labor items, you will be able to set the “Add Qty to JTD Hours” slider to ‘NO’, which will set the Quantity to ‘0’, but will still add the cost to the JTD Labor Costs on the Phase or Change Order breakdown.

← Back Direct Charges - Richards Replacement (Job #: 25-50) Print Save

Charge # Date Phase / Change Order*

Items

Item	Description	Quantity	Cost (\$)	Use Tax Amount (\$)	Total Cost (\$)	Use Tax	Add Qty to JTD Hours
Commission		0	\$50.00	\$0.00	\$50.00	NO	<input type="checkbox"/> NO
Search and select		Total: \$50.00					

Set the 'Add Qty to JTD Hours' field to 'No' if you do not want the quantity added to the JTD Hours field on the Phase or Change Order. When you set the Slider to 'No', it will change the Quantity to '0', but keep the cost entered.

Timeline Last - 05/22/2025 On Record - 3 | Job Info Base - 11560.92 C/O - 0.00 | Phases Base - 1 Changes - 0 | Billing Total - \$11,560.92 Balance - \$0.00 | Work Orders Total - 1 Posted - 0 | Purchase Order Amount - \$0.00 LTD - \$0.00 | Invc Invoic Bala

Richards Replacement Job #: 25-50

Base Job Change Order

Phase_25-50

Use Tax

Status: In Progress | Markup: Standard - 110 | Class: Installation | Problem Code: Search and select

Business Entity: Installation | Estimated Start Date: 05/21/2025 | Estimated End Date: 06/30/2025 | Grouping: Search and select

Manual NO | Prevailing Wage Task: OFF

	Subcontractor	Material	Labor	Hours	Misc.	Total
Estimated	\$0.00	\$3,971.01	\$188.00	8.00	\$0.00	\$4,159.01
Committed	\$0.00	\$3,952.82	\$50.00	0.00	\$600.00	\$4,602.82
JTD	\$0.00	\$0.00	\$50.00	0.00	\$600.00	\$650.00
Variance	\$0.00	\$3,971.01	\$138.00	8.00	-\$600.00	\$3,509.01
% Complete	0.00	0.00	26.60	0.00	0.00	15.63%

Notice the \$50.00 Labor cost was added to the JTD Labor, but the JTD Hours is still 0.00.

Reports – Project Management Use Tax Report now has an option to show Purchase Order costs without having to close out the Work Order

New options have been added to the Project Management Use Tax Report on how you want to report Purchase Order Costs. Prior to this release, the report would only include Purchase Order costs after the Work Order to which it was associated with was posted to Accounting. You now have the option to continue reporting PO costs via the Work Order Closing Date, or with the new options by the Receiving Slip Date or the Vendor Bill Date.

If you choose either Receiving Slip or Vendor Bill Date, the report will include items from any closed work orders for the selected month, but will only show items NOT from a PO. Any items Received or Vendor Bills received during the selected month will also show up on the Report, depending on the option selected. This will allow for you to account for PO costs from Purchase Orders that may have been partially received or partially billed during the selected month. **NOTE –** You should stay consistent as to which option you pick each month you run the Project Management Use Tax Report to ensure that you are reporting all appropriate costs. The option ‘WO Closing (default)’ is the option to choose if you want to continue reporting the way it use to be.

← Back Project Management Use Tax Report Print Export

Tuesday, July 15, 2025 1/1

For Month/Year: Jul 2025 Project Management Use Tax Report
PO Costs Based on the Receiving Slip Date

Job #	Customer Name	Job Name	Type	Source	Date	Taxable	Tax Amount	Total
Materials								
25-55	Steal, Sheila	New Install	DC	DC-1067	7/15/2025	500.00	31.25	531.25
Totals for Tax Region FL-Lee						500.00	31.25	531.25
Materials								
25-43	Gateway Property Management	GW Replacement	DC	DC-1062	7/7/2025	100.00	4.00	104.00
MOT002						52.00	2.08	54.08
25-43	Gateway Property Management	GW Replacement	RS	RS-1455	7/7/2025	52.00	2.08	54.08
TEM8A0C36						1,203.95	48.16	1,252.11
25-43	Gateway Property Management	GW Replacement	WO	WO-12406	7/15/2025	1,203.95	48.16	1,252.11
Totals for Tax Region AL-Jefferson-Birmingham-DM						1,355.95	54.24	1,410.19
Grand Totals						1,855.95	85.49	1,941.44

Filter Sidebar:

FILTER BY Clear All

Date Selection: This Month

Month/Year: July 2025

ADDITIONAL OPTIONS

PO Cost Option: Receiving Slip

Select Option: WO Closing (default), Receiving Slip, Vendor Bill

Pick the PO Cost option from the drop down list. Choose the option 'WO Closing (default)' to run the report as you always have. The option you choose will be displayed under the title.

← Back Project Management Use Tax Report Print Export

Tuesday, July 15, 2025 1/1

For Month/Year: Jul 2025 Project Management Use Tax Report
PO Costs Based on the Receiving Slip Date

Tax Region	Taxable	Tax Amount	Total
Totals for Tax Region FL-Lee	500.00	31.25	531.25
Totals for Tax Region AL-Jefferson-Birmingham-D073	1,355.95	54.24	1,410.19
Grand Totals	1,855.95	85.49	1,941.44

Filter Sidebar:

FILTER BY Clear All

Date Selection: This Month

Month/Year: July 2025

ADDITIONAL OPTIONS

PO Cost Option: Receiving Slip

Show Detail

Go

Do not enter a check mark in the 'Show Detail' check box in order to print a summary based on the Use Tax Region

Reports – Project Management Reports – Option to report PO Costs based on Vendor Bill Date has been added to several reports

An option to report PO Costs based on Vendor Bill Date as opposed to Receiving Slip Date has been added to the following reports:

- Project Management Over/Under Bonding Report
- Job Estimate vs Actual Report
- Project Management History Report
- Project Management Profitability Report

NOTE – The Vendor Bill Date option should only be used if you are entering all of your Vendor Bills in ServiceFactor. If you are not entering Vendor Bills in ServiceFactor, then you should not choose the ‘Use Vendor Bill Date as Opposed to Received Date’ filter.

← Back Project Management Over/Under Bonding Report Print Export

Tuesday, July 15, 2025 1/2

Project Management Over/Under Bonding Report

PO Costs based on Vendor Bill Date

Job #	Job Name	Sell Price	Estimated Cost	Estimated Profit %	JTD Cost	Percent Complete	Amount Earned	JTD Billed	Over/Under Billed	Percent Billed
25-1	Berk HVAC Install	10,750.00	4,767.69	55.65%	0.72	4.02%	1.62	5,375.00	(5,373.38)	50.00%
25-2	New Location	22,851.00	14,409.45	36.94%	330.28	2.29%	523.77	9,000.00	(8,476.23)	39.39%
25-3	John Deere	27,733.00	27,733.00	0.00%	8,708.89	31.40%	8,708.89	27,733.00	(19,024.11)	100.00%
25-4	New Home	10,000.00	10,000.00	0.00%	0.00	0.00%	0.00	0.00	0.00	0.00%
25-5	Love Install	4,150.00	0.00	100.00%	0.00	0.00%	0.00	0.00	0.00	0.00%
25-6	New Home	10,950.00	7,415.00	32.28%	298.37	4.02%	440.61	8,055.00	(8,184.39)	78.77%
25-7	Another New Home	8,123.27	3,644.21	55.14%	730.39	20.04%	1,628.10	0.00	1,628.10	0.00%
25-8	new home	20,123.00	4,325.00	78.51%	2,497.29	57.74%	11,619.18	0.00	11,619.18	0.00%
25-9	New Home	7,606.82	4,093.39	46.19%	0.00	0.00%	0.00	0.00	0.00	0.00%
25-10	Pool House 10	10,000.00	0.00	100.00%	202.42	0.00%	0.00	10,000.00	(10,000.00)	100.00%
25-11	Kellys	52,220.00	0.00	100.00%	0.00	0.00%	0.00	52,220.00	(52,220.00)	100.00%
25-12	Pool House 16	9,324.00	5,210.00	44.12%	0.00	0.00%	0.00	6,500.00	(6,500.00)	69.71%
25-13	Pool House 15	10,000.00	0.00	100.00%	26.13	0.00%	0.00	10,000.00	(10,000.00)	100.00%
25-14	Tuttle Replacement	0.00	0.00	0.00%	0.00	0.00%	0.00	96.17	96.17	0.00%
25-15	Randy Smith Job	3,000.00	0.00	100.00%	0.00	0.00%	0.00	3,000.00	(3,000.00)	25.00%
25-16	Amy Johns Job	0.00	0.00	0.00%	0.00	0.00%	0.00	0.00	0.00	100.00%
25-17	Pool House 20	1,000.00	0.00	100.00%	0.00	0.00%	0.00	1,000.00	(1,000.00)	100.00%
25-18	Pool House 25	0.00	0.00	0.00%	0.00	0.00%	0.00	0.00	0.00	0.00%
25-19	Duct Work	0.00	0.00	0.00%	0.00	0.00%	0.00	0.00	0.00	0.00%
25-20	Hendricks 2 1/2 Trane	18,500.00	8,947.80	51.63%	36.00	0.40%	74.43	0.00	74.43	0.00%
25-21	2 ton Trane	12,200.45	6,258.28	48.70%	0.00	0.00%	0.00	0.00	0.00	0.00%
25-22	Adams Replacement 2025	7,592.46	4,354.90	42.64%	199.50	4.58%	347.81	0.00	347.81	0.00%

Place a check mark in the 'Use Vendor Bill Date as opposed to Received Date' check box if you want the JTD Cost value based on the Vendor Bill instead of the Receiving Slip date. The option you choose will be printed below the Report Title

Use Vendor Bill Date as opposed to Received Date

SubTotal By: None

Go

Filter by: Clear All

Ending Date: Ending Date

ADDITIONAL OPTIONS

Include Open Jobs

Include Completed Jobs

Include Completed Jobs that match the Approval Date range

Include Retainage Withheld in BTD

Exclude Jobs that are BTD 100% with no Unbilled Retainage

Include Use Tax in Estimated Cost

Use Vendor Bill Date as opposed to Received Date

← Back Project Management Estimate Vs Actual Report Print Export

Wednesday, July 16, 2025 1/1

Job Estimate vs Actual

PO Costs based on Vendor Bill Date

Job # [25-42](#) Gateway Property Management Bill To: ABC Builder Class:
 G. C. Job # 848454 11928 Fairway Lakes Dr PO Box 1245 Business Entity:
 Approved: 4/30/2025 Ft Myers, FL 33913 Dallas, TX 75023 Lead Source: Angies List
 Completed Salesperson:
 Job Name: Test PO #: Status: Accepted Project Manager

	Sell	Tax	Total	Cost	GP \$	GP %	Collected
Estimated:	45,000.00	0.00	45,000.00	35,700.00	9,300.00	20.67%	0.00
JTD:	30,000.00	0.00	30,000.00	25,800.64	4,199.36	14.00%	Remaining
Variance:	15,000.00	0.00	15,000.00	9,899.36	5,100.64		30,000.00

Use Vendor Bill Date as opposed to Received Date

Filter by: Clear All

Include Open Jobs

Include Completed Jobs

Include Completed Jobs that match the Approval Date range

Include Retainage Withheld in BTD

Exclude Jobs that are BTD 100% with no Unbilled Retainage

Include Use Tax in Estimated Cost

Use Vendor Bill Date as opposed to Received Date

Wednesday, July 16, 2025 1/2

Project Management History Report

As Of 6/30/2025 PO Costs based on Vendor Bill Date

Job #	Job Name / Address	Bill to Name	Business Entity	Salesperson
25-42	Test 11928 Fairway Lakes Dr, Ft Myers 33913	ABC Builder		
Contract Amount: 45,000.00		Customer PO #:	Date Approved: 04/30/2025	
Change Orders: 0.00		G. C. Job #: 848454	Date Closed:	
Revised Contract Amt: 45,000.00				

Phase or CO	Name % Complete	Subs	Estimated		Job to Date		Variance		% Complete
			Amount	Hours	Amount	Hours	Amount	Hours	
Phase	Phase_25-42		4,500.00		0.00		4,500.00		0.00%
* Use Taxable	72.27%	Material:	30,000.00		25,800.00		4,200.00		86.00%
		Labor:	1,200.00	40.00	0.64	0.03	1,199.36	39.97	0.05%
		Other:	0.00		0.00		0.00		0.00%
Total:			35,700.00	40.00	25,800.64	0.03	9,899.36	39.97	72.27%
Totals			Subs: 4,500.00		0.00		4,500.00		0.00%
	72.27%	Material:	30,000.00		25,800.00		4,200.00		86.00%
		Labor:	1,200.00	40.00	0.64	0.03	1,199.36	39.97	0.05%
		Other:	0.00		0.00		0.00		0.00%
Total:			35,700.00	40.00	25,800.64	0.03	9,899.36	39.97	72.27%

FILTER BY Clear All

Salesperson

Project Manager

Ending Date

ADDITIONAL OPTIONS

- Include Open Jobs
- Include Completed Jobs
- Include Completed Jobs that match the Approval Date range
- Include Retainage Withheld in LTD
- Include Use Tax in Estimated Cost
- Include Unposted Work Orders
- Use Vendor Bill Date as opposed to Received Date

Wednesday, July 16, 2025 1/3

Project Management Profitability Summary Report

As Of 6/30/2025 PO Costs based on Vendor Bill Date

Job #	Job Name	Estimate				Job To Date					
		Sell Price	Cost	Profit	GPM %	Amt Billed	Cost	Profit	GPM %	GPS/Hr	GPS/Day
25-1	Berk HVAC Install	10,750.00	4,767.69	5,982.31	55.65%	5,375.00	0.72	5,374.28	99.99%	268,714.00	2,149,712.00
25-2	New Location	22,851.00	14,409.45	8,441.55	36.94%	9,000.00	330.28	8,669.72	96.33%	1,017.57	8,140.58
25-3	John Deere	27,733.00	27,733.00	0.00	0.00%	27,733.00	8,708.89	19,024.11	68.60%	679.43	5,435.46
25-4	New Home	10,000.00	10,000.00	0.00	0.00%	0.00	0.00	0.00	0.00%	0.00	0.00
25-5	Love Install	4,150.00	0.00	4,150.00	100.00%	0.00	0.00	0.00	0.00%	0.00	0.00
25-6	New Home	10,950.00	7,415.00	3,535.00	32.28%	8,625.00	298.37	8,326.63	96.54%	951.61	7,612.92
25-7	Another New Home	8,123.27	3,644.21	4,479.06	55.14%	0.00	730.39	-730.39	0.00%	-35.20	-281.60
25-8	new home	20,123.00	4,325.00	15,798.00	78.51%	0.00	2,497.29	-2,497.29	0.00%	-36.76	-294.10
25-9	New Home	7,606.82	4,093.39	3,513.44	46.19%	0.00	0.00	0.00	0.00%	0.00	0.00
25-10	Pool House 10	10,000.00	0.00	10,000.00	100.00%	10,000.00	202.42	9,797.58	97.98%	2,449.39	19,595.16
25-11	Kellys	52,220.00	0.00	52,220.00	100.00%	52,220.00	0.00	52,220.00	100.00%	0.00	0.00
25-12	Pool House 16	9,324.00	5,210.00	4,114.00	44.12%	6,500.00	0.00	6,500.00	100.00%	0.00	0.00
25-13	Pool House 15	10,000.00	0.00	10,000.00	100.00%	10,000.00	26.17	9,973.83	99.74%	71,241.63	569,933.01
25-14	Tuttle Replacement	7,342.46	4,260.40	3,082.06	41.98%	0.00	55.80	-55.80	0.00%	-36.00	-288.00
25-15	Randy Smith Job	12,000.00	7,574.29	4,425.71	36.88%	3,000.00	0.00	3,000.00	100.00%	0.00	0.00
25-16	Amy Johns Job	1,000.00	84.00	916.00	91.60%	1,000.00	5,250.00	-4,250.00	-425.00%	0.00	0.00
25-17	Pool House 20	10,000.00	0.00	10,000.00	100.00%	10,000.00	104.72	9,895.28	98.95%	197,905.60	1,583,244.80

FILTER BY Clear All

Ending Date

ADDITIONAL OPTIONS

- Include Open Jobs
- Include Completed Jobs
- Include Completed Jobs that match the Approval Date range
- Include Retainage Withheld in LTD
- Exclude Jobs that are LTD 100% with no Unbilled Retainage
- Include Use Tax in Estimated Cost
- Use Vendor Bill Date as opposed to Received Date
- Show Cost Breakdown

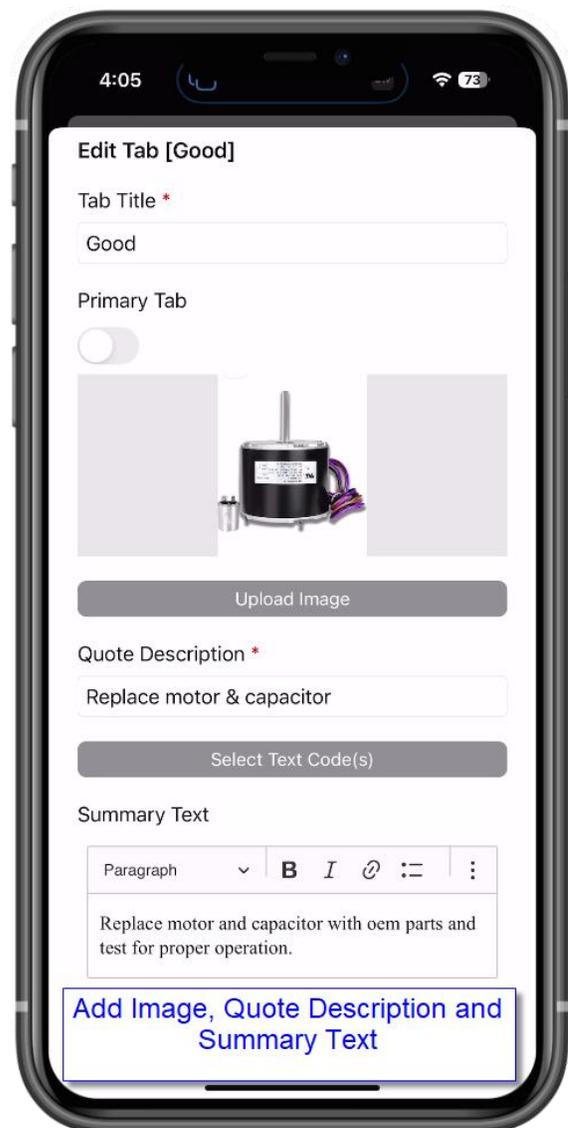
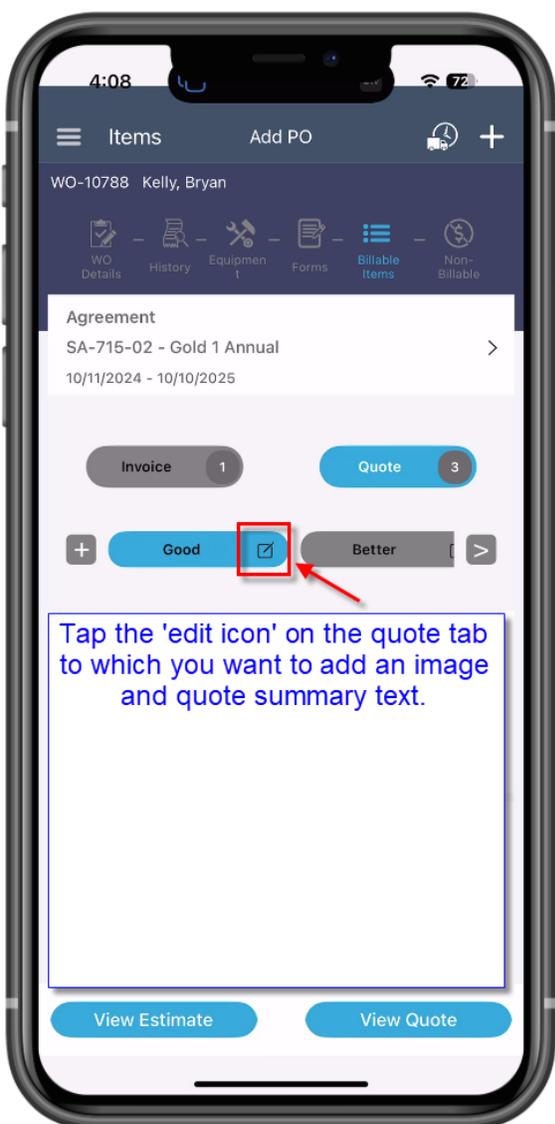
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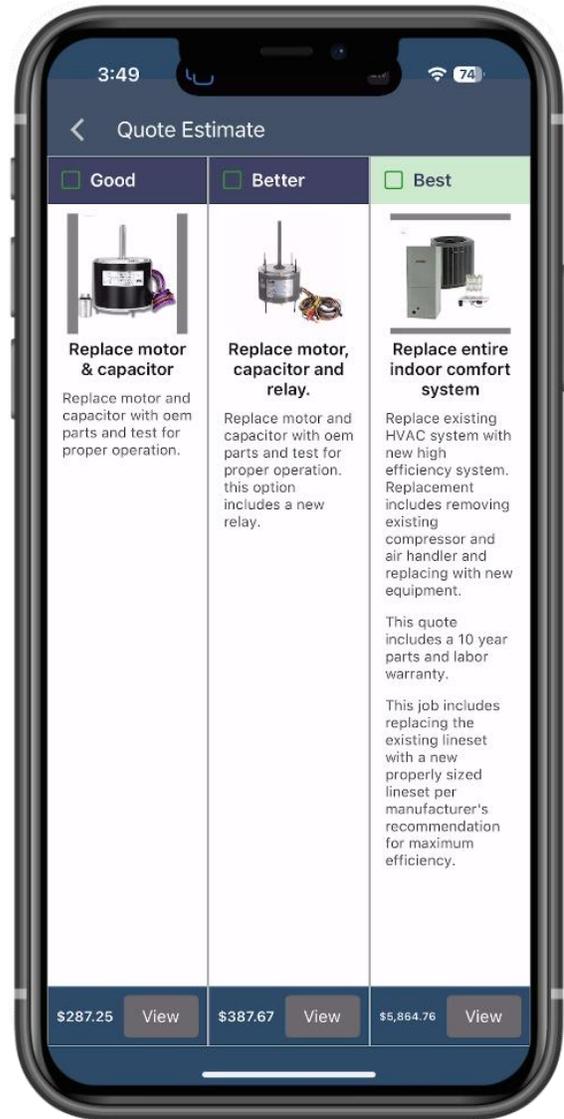
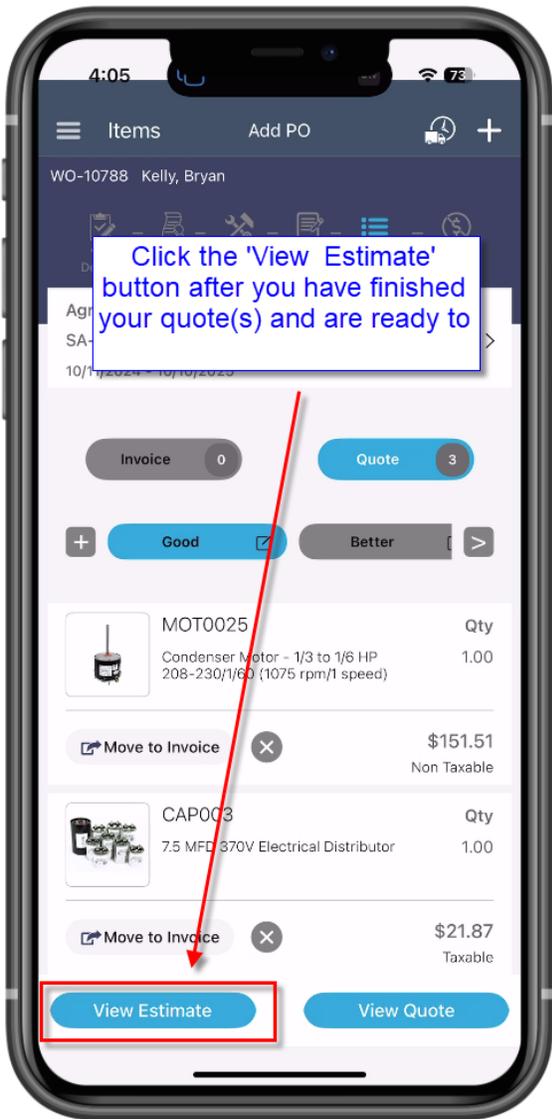
Go

SF Mobile – Quotes have a new ‘View Estimate’ option in SF Mobile

The quotes have been enhanced in SF Mobile, providing a better quote presentation experience. There is now an option to ‘View Estimate’ at the bottom of the Quote screen, which will open a new “Quote Estimate” screen that will display the different quote options along with the image and quote summary information. If you have more than 3 estimates on the quote, you can scroll the screen to view the additional options. The bottom of each section will display the sell price and the ability to view the details of a particular estimate.

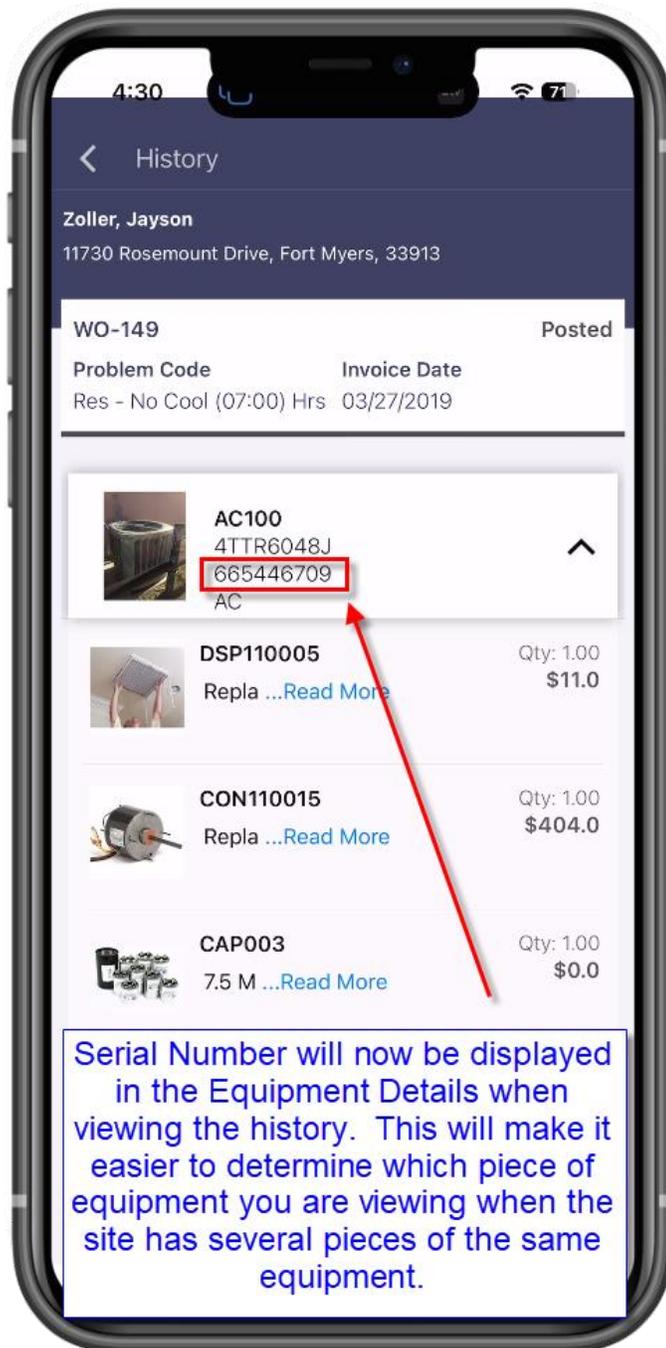
To add an image and Quote Summary text to a quote, tap the ‘Edit’ icon in the Quote Name. This will allow you to edit the Quote Name, add an image, enter a Quote Description and enter Text Code(s) or manually enter text that will appear on the quote and the Quote Estimate screen.





SF Mobile – History Screen will now show the Serial Number associated with the Equipment

When drilling into a work order to view the history in SF Mobile, it will now show the Serial Number associated with the piece of equipment for which the history is being displayed. Prior to this release, only the Equipment ID, Model Number and Equipment were displayed. This made it difficult to know which piece of equipment you were looking at if you have more than one of the same model number located at the site.



SF Mobile – New warning popup if you try to leave a form without first saving it

If you are filling out a Form and try to leave the form without saving it, the system will now give you an alert that you have unsaved changes and verify that you want to leave.

