

# SF Release Notes: September 25, 2025

**Work Order Invoice – A new popup will appear if you change the Bill To on a Work Order if the Bill To customer has a different Labor or Material Markup Rate allowing you to pick which rate to choose**

Changing the Bill To on a Work Order or an Invoice will now prompt you if the Bill To Labor or Material Markup Rate is different than the site. This will allow you to choose the proper Labor Rate or Material Markup Rate depending on the situation.

**Confirm Changes**

Field	Current	New	Accept
Markup	Standard - 110	90 Hr Commerical	<input checked="" type="checkbox"/>
Rate Type	Residential	Base100	<input checked="" type="checkbox"/>

Buttons: Cancel, Continue

Background: Change Bill To \*  
ABC PROPERTY MANAGEMENT

If you change the Bill To on a Work Order (or Invoice), if the Material Markup or Labor Rate is different, you will be prompted as to which Rates you want to use. By default, the system will prompt you to use the Bill To Rates, but you can remove the check mark if you do not want to accept the new rates.

**Confirm Changes**

Field	Current	New	Accept
Markup	Standard - 110	90 Hr Commerical	<input checked="" type="checkbox"/>
Rate Type	Residential	Base100	<input checked="" type="checkbox"/>

Buttons: Cancel, Continue

Background: Invoice tab, WO-12833, Adams, Melanie, 11467 Bent Pine Drive, Fort Myers, Florida, 33913

## Work Orders – You can now update the ‘Work Order History Summary’ field on a posted Project Management Work Order

You can now add notes to the Work Order History Summary field on a Posted Project Management (Job Cost) work order. To edit, simply click the Work Order History Summary hyperlink and it will open a popup where you can add the summary.

NOTE – The Work Order History Summary shows up in the History Screen and is used as a brief summary of what work was performed on a Work Order.

ServiceFactor

← Back Work Order Details - WO-11784 Posted

**Timeline** Last: 04/08/2025 On Record: 10

**Timesheet** Worked: 0.10 Traveling: 0.02

**Invoice** Invoiced: \$0.00 Balance: \$0.00

Email Invoices Bill online Email Print Invoice Change Status Save

This Project Management work order has already been posted. Editing is not allowed.

Bill To: Tutone, Tommy Invoice #: F-10353 Profitability Details

Bill To Address: 3401 Custer Rd #5588, Plano, Texas, 75023 (210) 445-5944 Terms: Due on receipt Invoice Date: 04/08/2025 Due Date: 04/08/2025

Customer PO #: Sales Rep: William Markup: Standard - 110 Class: Installation

Business Entity: Installation Call Back: NO Original Work Order: Search and select

Allow To Pay Bill Online: NO Hide from Customer Portal: NO Print Equipment: YES Hide Prices: NO

**Work Order History Summary**

Click the "Work Order History Summary" hyperlink on a posted Project Management Work Order to add or exit the Work Order History Summary

Invoice Items Picking Slip Create PO From Invoice

Modify Workorder History Summary

Work Order # WO-11784

Work Order History Summary

Installed new system and replaced all existing duct work.

57 of 125 characters used

Cancel Save

### Work Order History Summary

Installed new system and replaced all existing duct work.

## Work Order Listing – Status colors have been updated so that each status displays a different color

The Work Order status column has been updated with different colors based on the Status. This will make it easier to quickly determine the status of a Work Order.



























The status colors are as follow:

Unassigned – Pink

Assigned – Green

Completed – Black

Posted – Gray

Status ↑↓	↑↓	Action
Unassigned		 
Posted	✓	 
Posted	✓	 
Posted	✓	 
Posted	✓	 
Posted	✓	 
Unassigned		 
Assigned	✓	 
Completed	✓	 
Assigned	🛑	 
Unassigned		 
Unassigned		 
Unassigned		 

## Employee Time Entry Screen – Added the site name associated with the Work Order to the screen and the Work Order Drop Down list

In the Employee Time Entry Screen, the site name associated with the Work Order was added to the screen as well as to the Drop Down if you are searching for a specific work order number. This will help you verify that you have selected the proper work order without having to look up the information in a different screen.

← Back Time Entries - Chuck Tuttle

RT Hrs:- 2.25 OT Hrs:- 0.00 DT Hrs:- 0.00 Total Hrs:- 2.25

From 09/01/2025 To 09/28/2025 Go

Adjust to Overtime QB Sync Add

Date	Description	Start Time	End Time	Duration (Hrs)	Duration (Hrs:Mins)	Accumulated RT (Hrs:Mins)	Accumulated OT (Hrs:Mins)	Accumulated DT (Hrs:Mins)	Overtime	Double Time	Class	Actions
09/18/2025											Residential:Maintenance	
09/18/2025											Residential:Maintenance	
09/18/2025											Residential:Maintenance	

Activity Type \*

Traveling

Class

Residential:Maintenance

Start time \*

12:03 PM

End time \*

12:03 PM

☐ Overtime ☐ Double Time

Cancel Save

WO Number \*

WO-12667

Conanan, Ray

Date \*

09/18/2025

Site Name associated with the Work Order will now be displayed under the WO Number field

Add Time

Activity Type \*

Working

Class

Select

Start time \*

End time \*

WO Number \*

126

WO-1262 - Alexander, Alan

WO-12625 - Black, Micah

WO-1266 - Bass, Denise

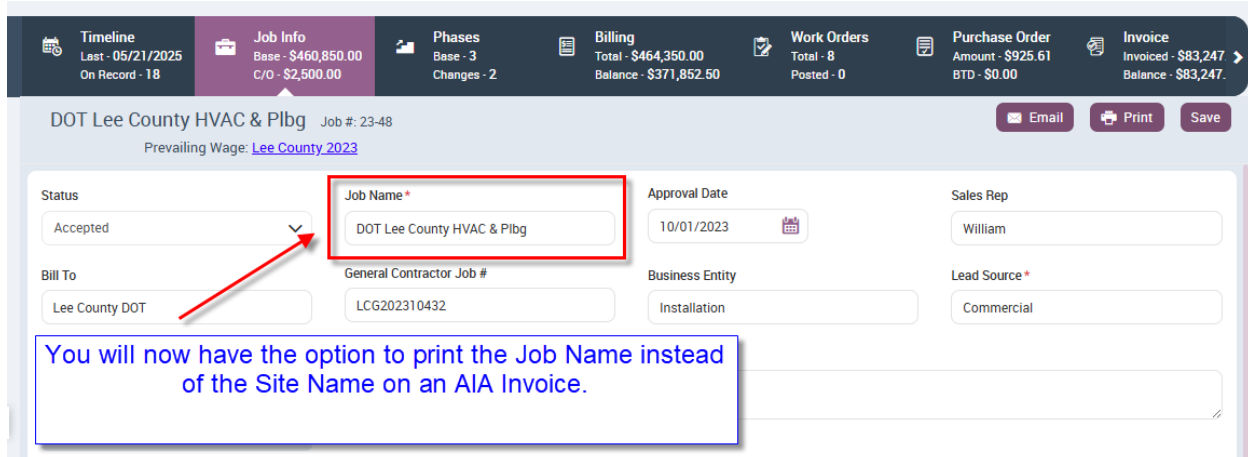
WO-12667 - Conanan, Ray

Cancel Save

Site name will display in the Drop Down while searching for WO #

## Project Management (Job Cost) – Printing an AIA Invoice will now give you the option to print the Job Name instead of the Site Name if necessary

When printing an AIA Invoice, you now have the option to substitute the Job Name instead of the Site Name on the printed and/or emailed Invoice. Simply place a check mark in the



DOT Lee County HVAC & Plbg Job #: 23-48  
Prevailing Wage: [Lee County 2023](#)

Status: Accepted ✓

Job Name \*: DOT Lee County HVAC & Plbg

Approval Date: 10/01/2023

Sales Rep: William

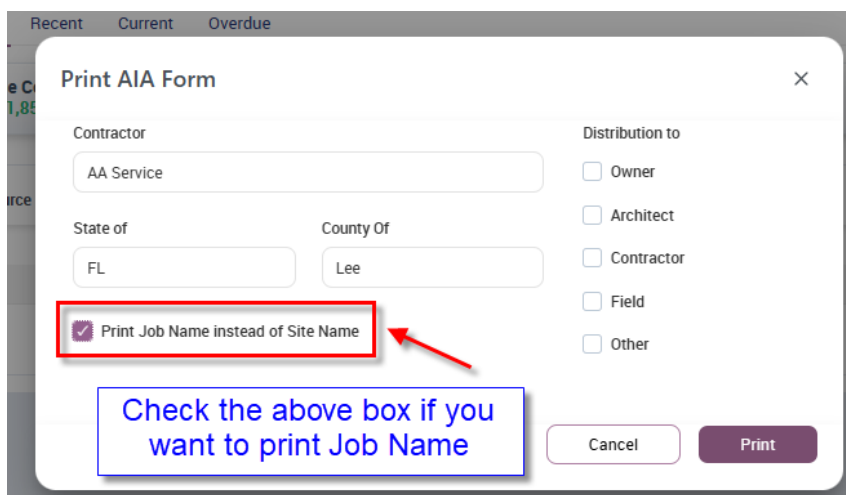
Bill To: Lee County DOT

General Contractor Job #: LCG202310432

Business Entity: Installation

Lead Source \*: Commercial

You will now have the option to print the Job Name instead of the Site Name on an AIA Invoice.



Recent Current Overdue

Print AIA Form

Contractor: AA Service

State of: FL County Of: Lee

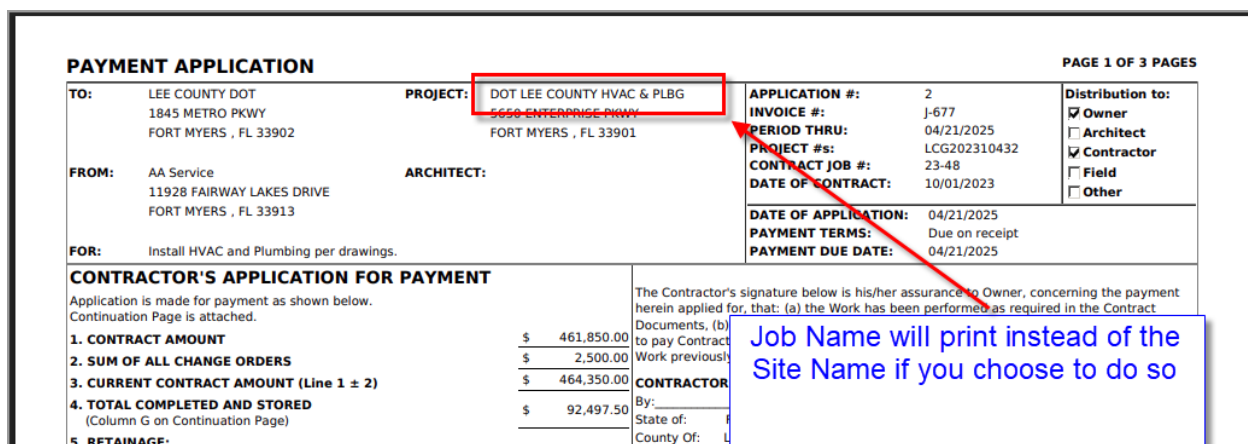
☒ Print Job Name instead of Site Name

Distribution to:

- ☐ Owner
- ☐ Architect
- ☐ Contractor
- ☐ Field
- ☐ Other

Cancel Print

Check the above box if you want to print Job Name



PAYMENT APPLICATION

TO: LEE COUNTY DOT  
1845 METRO PKWY  
FORT MYERS, FL 33902

FROM: AA Service  
11928 FAIRWAY LAKES DRIVE  
FORT MYERS, FL 33913

FOR: Install HVAC and Plumbing per drawings.

PROJECT: DOT LEE COUNTY HVAC & PLBG  
5656 ENTERPRISE PKWY  
FORT MYERS, FL 33901

ARCHITECT:

APPLICATION #: 2  
INVOICE #: J-677  
PERIOD THRU: 04/21/2025  
PROJECT #s: LCG202310432  
CONTRACT JOB #: 23-48  
DATE OF CONTRACT: 10/01/2023

DATE OF APPLICATION: 04/21/2025  
PAYMENT TERMS: Due on receipt  
PAYMENT DUE DATE: 04/21/2025

Distribution to:

- ☒ Owner
- ☐ Architect
- ☒ Contractor
- ☐ Field
- ☐ Other

CONTRACTOR'S APPLICATION FOR PAYMENT

Application is made for payment as shown below. Continuation Page is attached.

1. CONTRACT AMOUNT	\$ 461,850.00
2. SUM OF ALL CHANGE ORDERS	\$ 2,500.00
3. CURRENT CONTRACT AMOUNT (Line 1 ± 2)	\$ 464,350.00
4. TOTAL COMPLETED AND STORED (Column G on Continuation Page)	\$ 92,497.50
5. RETAINAGE:	

The Contractor's signature below is his/her assurance to Owner, concerning the payment herein applied for, that: (a) the Work has been performed as required in the Contract

CONTRACTOR By: \_\_\_\_\_ State of: \_\_\_\_\_ County Of: \_\_\_\_\_

Job Name will print instead of the Site Name if you choose to do so

## Project Management (Job Cost) – You can now change the price of a Change Order after you have started billing it

You now have the ability to change the Sell Price of a Change Order after you have already started billing for it. This will allow you to perform ‘Time and Material’ Change Orders. NOTE – You will need to calculate the amount you want to charge for each invoice. In order to change the sell price of a change order after it has been previously billed, you will need to post all Job Invoices associated with the particular job, at which time, the system will allow you to change the sell price of the Change Order in the Change Order screen.

ServiceMaster  
← Back BEST BUY 10033 Job #: 22-12

Form Type: Regular Invoice #: J-723 Invoice Date: 01/31/2025 Period To: 01/31/2025 Terms: Due on receipt

Bill To: Best Buy Sales Rep: Bobby PO #: 8675309 Retainage %: 0.00

Bill To Address: 10033 Gulf Center Dr, Fort Myers, 33913

Allow To Pay Bill Online: NO Bill Retainage: NO Apply Retainage to Def Class: NO Print Net this Invoice: YES Print \$ Received: NO

		Base Contract	Change Orders
Sell Price	\$78,883.00	\$4,150.00	
Billed TD	\$19,720.75	\$0.00	
Open (Diff)	\$59,162.25	\$4,150.00	
% Billed	25.00%	0%	
Retainage	\$0.00	\$0.00	

Source	Description	Total Value	% Complete	\$ Complete	\$ Retainage	\$ Net this Invoice	Taxable	Class
Phase	As Agreed per contract	78883.00	25.00000	19720.75	0.00	0.00	NO	Installation
Change	Cut through wall	650.00	100.00000	650.00	0.00	650.00	NO	Search and select
Change	Change location of unit	1000.00	0.00000	0.00	0.00	0.00	YES	Installation
Change	Install Hepa Filtration System	2500.00	0.00000	0.00	0.00	0.00	NO	Commercial IAQ

24.53% Billed Complete (Including this invoice) \$20,370.75

Less 0.00 % Retainage (This invoice) \$0.00

Previously Invoiced \$19,720.75

Subtotal \$650.00

Tax \$0.00

Total due this invoice \$650.00

This change order started out being \$650.00 and you will notice that it has been billed 100%.

All of the change orders add up to \$4,150.00

ServiceMaster  
← Back BEST BUY 10033 Job #: 22-12

Form Type: Regular Invoice Date: 09/24/2025 Period To: 09/24/2025 Terms: Due on receipt

Bill To: Best Buy Sales Rep: Bobby PO #: 8675309 Retainage %: 0.00

Bill To Address: 10033 Gulf Center Dr, Fort Myers, 33913

Allow To Pay Bill Online: NO Bill Retainage: NO Apply Retainage to Def Class: NO Print Net this Invoice: YES Print \$ Received: NO

		Base Contract	Change Orders
Sell Price	\$78,883.00	\$4,600.00	
Billed TD	\$19,720.75	\$650.00	
Open (Diff)	\$59,162.25	\$3,950.00	
% Billed	25.00%	14.13%	
Retainage	\$0.00	\$0.00	

Source	Description	Total Value	% Complete	\$ Complete	\$ Retainage	\$ Net this Invoice	Taxable	Class
Phase	As Agreed per contract	78883.00	25.00000	19720.75	0.00	0.00	NO	Installation
Change	Cut through wall	1100.00	59.09091	650.00	0.00	0.00	NO	Search and select
Change	Change location of unit	1000.00	0.00000	0.00	0.00	0.00	YES	Installation
Change	Install Hepa Filtration System	2500.00	0.00000	0.00	0.00	0.00	NO	Commercial IAQ

24.40% Billed Complete (Without this invoice) \$20,370.75

Less 0.00 % Retainage (This invoice) \$0.00

Previously Invoiced \$20,370.75

Subtotal \$0.00

Tax \$0.00

Total due this invoice \$0.00

After changing the Sell Price on the Change Order, you will notice the new price of the Change Order and the new % Complete amount when adding a new Invoice.

The overall sell price of the Change Orders also changed on the new invoice, reflected the new total.

## Project Management (Job Cost) – Tags have been added to the Job

You can now add Tags to a Job. The tags will be located on the Job Info screen, but will also be displayed at the bottom of the Additional Information section.

NOTE – You will need to go to the Tags file in Settings and select which tags should be available for Job Cost.

**ServiceFactor**

← Back Job Details **ACCEPTED**

**BB Best Buy**  
10033 Gulf Center Dr, Fort Myers, Florida, 33913  
(239) 433-5112  
nmtuttie@earthlink.net

Contract Amount \$78,883.00  
Billed To Date \$19,720.75  
Variance \$59,162.25  
C/O Amount \$4,600.00  
C/O Billed To Date \$650.00  
Variance \$3,950.00  
Est. Contract Cost \$279.88  
JTD Contract Cost \$116,323.99  
Variance -\$116,044.11  
Est. C/O Costs \$1,395.00  
JTD C/O Costs \$374.03  
Variance \$1,020.97

Job Tags  
Needs Warranty Setup  
Permit Required

**BEST BUY 10033** Job #: 22-12 Prevailing Wage: **OFF**

Status: Accepted Job Name: BEST BUY 10033 Approval Date: 04/07/2022 Sales Rep: Bobby

Bill To: Best Buy General Contractor Job #: General Contractor Job # Business Entity: Search and select Lead Source: Existing Customer

Bill To: 10033 Gulf Center Dr, Fort Myers, Florida, 33913 Note: New Unit

Markup: Commercial Class: Commercial/IAQ

PO #: 8675309 Selling Price: 78883.00 Closed Date: Search and select

**Tags**  
Needs Warranty Setup Permit Required

Estimate

	Estimated Cost	Markup(%)	Markup(\$)
Subs	\$0.00	3.00	\$0.00

Contract

	Base Contract	Change Orders
Sell	\$78883.00	\$4,600.00
Adjustment	\$0.00	\$0.00

Tags can now be added to Jobs.  
Tags will appear on the left hand side in the Additional Information section so that they can be viewed from any screen in Project Management

**Edit Tag**

Tags Name \*  
Needs Warranty Setup  
25 characters max

Choose Color \*  
Orange

Active ☒

**Module**

- ☐ Customer
- ☐ Equipment
- ☐ Service Agreement
- ☐ Work Order
- ☐ Quotes
- ☒ **Jobs**

Place a check mark in the Jobs check box for any tags you want available in Job Cost

Save

# Reports – PO Type has been added to several reports and PO Types have been added to the Filters for several reports

The PO Type and PO Type filters have been added to the Following Reports:

## Inventory and Item Reports Section

Purchase Order Quantity Report  
Purchase Order Balance Report  
Inventory Items to be Billed Report

## Accounting Reports Section

Vendor Bill Report

Wednesday, September 24, 2025

### Vendor Bill Report

Invoice #	Invoice Date	PO #	PO Date	PO Total	Invoice Total	Vendor Name
1212	03/27/2025	SPO-1714	03/25/2025	104.62	104.62	Johnstone Supply
1215449	03/12/2025	SPO-1696	03/12/2025	208.0		
121554	04/09/2025	SPO-1727	04/09/2025	895.0		
12156	04/24/2025	SPO-1734	04/24/2025	255.0		
121563	03/31/2025	SPO-1722	03/31/2025	1.6		
123445566	03/27/2025	SPO-1719	03/27/2025	325.0		
123456	01/29/2025	SPO-1638	01/29/2025	55.3		
123456	09/05/2025	JPO-1832	09/05/2025	1,500.0		
123456	03/14/2025	JPO-1685	03/05/2025	250.0		
123456	02/07/2025	JPO-1647	02/07/2025	1.7		
1234566	02/10/2025	SPO-1646	02/05/2025	4.5		
123456758	03/27/2025	SPO-1718	03/27/2025	0.0		
1234567864	07/25/2025	IPO-1815	07/25/2025	264.3		
12345678900	02/10/2025	SPO-1651	02/10/2025	256.2		
123456abc	03/18/2025	SPO-1704	03/18/2025	168.0		
1253	06/25/2025	SPO-1790	06/25/2025	50.00	50.00	Carrier
125684612	04/10/2025	JPO-1720	03/27/2025	1,874.29	1,874.29	Trane
1321354	07/24/2025	SPO-1813	07/24/2025	27.87	27.87	Carrier
1354368	04/30/2025	IPO-1742	04/30/2025	15,973.50		
212156	04/24/2025	SPO-1732	04/24/2025	37.08		
21212154	03/26/2025	SPO-1716	03/26/2025	20.92		
21255	04/24/2025	SPO-1733	04/24/2025	125.00		
215665464	03/12/2025	SPO-1695	03/12/2025	315.00	315.00	Trane
222255889969	01/07/2025	JPO-1616	01/07/2025	7,700.00	3,400.00	Johnstone Supply
22255252525	08/12/2025	SPO-1820	08/12/2025	225.00	225.00	Trane
232321544546878	02/27/2025	SPO-1675	02/27/2025	223.00	223.00	Trane
2						
236516512	03/10/2025	SPO-1686	03/05/2025	0.00	0.00	Johnstone Supply

The PO # column will now display a letter in front of the PO Number indicating the type of PO.  
I = Inventory PO  
J = Job Cost (Project Mgt PO)  
S = Service PO (Work Order PO)  
For example, SPO-1714 indicates that it is a Service PO

Filters have been added in order select a specific PO Type

ADDITIONAL OPTIONS

- ☒ Include Inventory PO
- ☒ Include Work Order PO
- ☒ Include Job PO

Go

## Reports – Work Order Profitability Report – Added the ability to choose invoices without an Invoice Date

A new filter has been added to the Work Order Profitability Report that will allow you to choose invoices that do not have an invoice date. This will allow you to display work orders that have labor times, but have not yet had an invoice date assigned. This will allow you to get a better idea of costs on invoices that have not yet been completed or posted.

**NOTE** – When choosing the option “Include Work Orders without Invoice Dates”, you will also need to choose the “Un-Posted Work Orders” check box in order to get all records.

Wednesday, September 24, 2025

### Work Order Profitability Report

1/26

WO #	Site Name	Lead Tech	Total Cost	Total Sale	Profit Dollars	Profit %	Total Hours	Avg Revenue per Hour
WO-10113	McDonald's #14777	Chuck Tuttle	0.00	0.00	0.00	0.00%	0.00	0.00
F-8861	Com HVAC Service	Commercial			None		Central Plano	
WO-10372	William Osborn	Bobby	0.00	0.00	0.00	0.00%	0.00	0.00
F-9106	Com HVAC Service	Existing Customer			None		Central Plano	
WO-10930	McDonalds #694	3-Rachael Riggs	0.00	0.00	0.00	0.00%	0.04	0.00
A-9598		Existing Customer			Maintenance		Plano North	
WO-10941	Perry Enterprise	Brett A.	68.15	0.00	-68.15	0.00%	1.88	0.00
A-9609		Commercial			Maintenance			
WO-11160	Maverick, Joe	Brett A.	0.00	0.00	0.00	0.00%	0.00	0.00
A-9785		Existing Customer			Maintenance		North FM	
WO-11161	Maverick, Joe	Brett A.	0.00	0.00	0.00	0.00%	0.00	0.00
A-9786		Existing Customer			Maintenance		North FM	
WO-11378	Blockbuster	James Crain	0.00	0.00	0.00	0.00%	0.00	0.00
F-9986	Com Plumbing Service	Commercial			None		Plano	
WO-11506	Frost, Jane	Matt W	0.00	0.00	0.00	0.00%	0.00	0.00
F-10102	Res HVAC Service	Customer Referral			None		Plano	
WO-11834	Jones, Jane	3-Rachael Riggs	0.00	0.00	0.00	0.00%	0.18	0.00
F-10394	Res HVAC Service	Google			None		Plano	

**FILTER BY** [Clear All](#)

Work Order Number From:

Work Order Number To:

INVOICE DATES [clear](#)

This Month

From: 09/01/2025 To: 09/30/2025

☒ Include Work Orders without Invoice Dates ⓘ

Business Entity:

Work Order Lead Source:

Work Order Lead Tech:

Customer Type:

Problem Code:

[Go](#)

**ADDITIONAL SELECTIONS**

Tags:

☒ Un-Posted Work Orders

☒ Completed Work Orders

☒ Posted Work Orders

☐ Show Breakdown

SubTotal by:

Work Order Type:

Sort By:

Order By:

[Go](#)

## Reports - Work Order Reports –Item Usage Report – Subtotal by Lead Tech filter has been added

A filter to Subtotal by the Lead Tech has been added to the Item Usage Report under the Work Order Reports section. This will allow you to search for specific Items and subtotal by each technician to see how much of an item that the tech has used. This can be useful if you are paying Piece Rate, Spiffs, Commissions, etc. if you add it as an item to the Invoice.

The screenshot displays the ServiceFactor Item Usage Report interface. The main table lists item usage data with columns: Item Name, Work Order #, Invoice Date, Site Name, Location, Qty, Unit Cost, Total Cost, Primary Tech, and Sell Price. The table is filtered by 'Subtotal' and 'Lead Tech'. A blue callout box highlights the 'Subtotal by' filter in the sidebar, which is set to 'Lead Tech'. A red arrow points from the callout box to the 'Subtotal by' dropdown menu in the sidebar.

Wednesday, September 24, 2025

Item Usage Report 1/3

Item Name	Work Order #	Invoice Date	Site Name	Location	Qty	Unit Cost	Total Cost	Primary Tech	Sell Price
Description									
FLT2020	WO-11006	01/07/25	Richardson, Danny	Main	1.00	5.50	5.50		6.00
20 X 20 X 1 Disposable Filter									
FLT2020	WO-11024	01/07/25	Thompson, Joe	Main	12.00	5.50	66.00		48.00
20 X 20 X 1 Disposable Filter									
FLT2020	WO-12372	07/07/25	Richardson, Danny	Main	1.00	5.50	5.50		6.00
20 X 20 X 1 Disposable Filter									
SubTotal					14.00		77.00		60.00
20 X 20 X 1 Disposable Filter									
FLT2020	WO-10730	02/19/25	Mitchell, Julie	Truck 102	3.00	5.50	16.50 1 - On Hold		44.10
20 X 20 X 1 Disposable Filter									
SubTotal	1 - On Hold				3.00		16.50		44.10
20 X 20 X 1 Disposable Filter									
FLT2020	WO-11776	07/11/25	Weige, Eric	Main					0.00
20 X 20 X 1 Disposable Filter									
FLT2020	WO-12370	07/07/25	Lawhons	PO					102.50
20 X 20 X 1 Disposable Filter									
FLT2020	WO-12015	05/15/25	Henderson, Bill	Main					0.00
20 X 20 X 1 Disposable Filter									
SubTotal	Allen Johnson				12.00		71.00		192.50
20 X 20 X 1 Disposable Filter									
FLT2020	WO-6121	05/30/25	Jones, Arthur	PO-961	6.00	3.55	21.30 Bobby		36.00
20 X 20 X 1 Disposable Filter									
FLT2020	WO-6121	05/30/25	Jones, Arthur	PO-964	2.00	3.55	7.11 Bobby		26.26
20 X 20 X 1 Disposable Filter									
FLT2020	WO-12305	07/14/25	Discount Tires	Main	4.00	5.50	22.00 Bobby		0.00

Filter By: [Clear All](#)

- ☒ Inventory Items
- ☒ Non Inventory Items
- ☒ Assembly Items
- ☒ Flat Rate Items
- ☒ Service Items
- ☒ Discount Items
- ☒ Deferred Items

COST TYPES

- ☒ Material
- ☒ Labor
- ☒ Subcontractor
- ☒ Other

Subtotal By: Lead Tech

Sort By: Item Name/Number

Order By: Ascending

[Go](#)