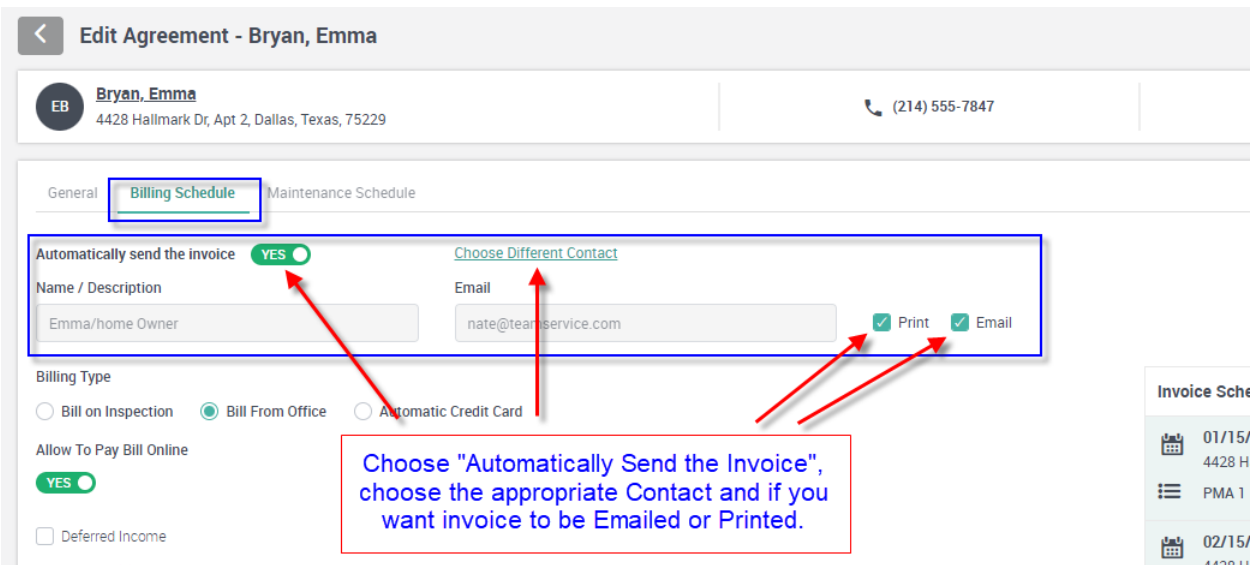


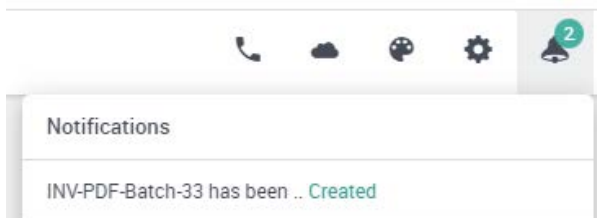
SF Release Notes: April 5, 2022

The Ability to Automatically E-Mail or Print Service Agreement Invoices That Have Been Automatically Created has Been Added to the System

You can now define if you want the system to automatically E-Mail or Print Service Agreement Invoices when they are created by the system. A new “Automatically Send the Invoice” slider has been added to the “Billing Schedule” screen of the Service Agreement. If you turn the slider on, you will be prompted as to whether you want to Email and/or Print the invoice. If you choose to email the invoice, you will be prompted as to which customer contact you want the email sent. If you elect to Print the invoice, it will be added to a batch along with all the other invoices that are generated and send an alert via the “Bell” icon at the top of the screen. You can then print the batch and “Snail Mail” the invoices to the customers. **NOTE** – Clicking on the Bell Icon will display any Print Batches that have not yet been printed. Once they have been printed, the alert will be removed. **NOTE 2** – Only “Bill from Office” and “Automatic Credit Card” billing types are eligible to be automatically Printed or Emailed. “Bill on Inspection” invoices will be printed or emailed upon completion.



If you have defined your invoices to be “Automatically Sent” and selected the “Print” option, one PDF will be created that includes all of the invoices so defined. You can print the PDF, which will print each Invoice on its own page. You can find the PDF by clicking on the Bell Icon when it alerts you that a PDF Batch has been created. To print the PDF, go to the “Invoices” menu option and click the “Print Run” button.



All Invoices (5216)

Print Run Mass Creation Print Export

All Recent Current Overdue Pending Completed Auto CC Issue Search by Customer

Invoice #	Site Name	WO #	PO #	Invoice Date	Due Date	Total	Balance	Technician	Action	Saved
A-4953	Bryan, Emma	WO-5628		04/05/2022	04/05/2022	\$25.00	\$25.00			
A-4938	Cambell, Roger	WO-5611		04/04/2022	04/04/2022	\$416.58	\$416.58			
A-4924	Cambell, Roger	WO-5612		04/04/2022	04/04/2022	\$416.58	\$416.58			
F-4940	Smith, Randy	WO-5614		04/04/2022	04/04/2022	\$38.16	\$38.16	Robby		

Print Run

Active History

Print Run # Type Description Created At Created By

INV-PDF-Batch-33	SA Invoice	Mass creation of invoices	04/05/2022 11:17 AM	Nate	Active	Details	Download
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15 Showing 1 - 1 of 1

Click the Details Button to see what Invoices are Included in the Batch, or to Reprint the Invoices in the PDF

Click the Download Button to download the PDF for Printing

Print Run Detail

PrintRun#: INV-PDF-Batch-33 Description: Mass creation of invoices Included In Print Run

Type: SA Invoice Status: Downloaded

Created At: 04/05/2022 11:17 AM

Created By: Nate

Deleted At: File will automatically be deleted 30 days after creation.

Download

Download History

User	Date/Time
Nate	04/05/2022 11:55 AM

The ability to Manually Mass Renew Service Agreements Has Been Added

You now have the ability to manually renew a group of Service Agreements in bulk, as opposed to renewing them individually, or waiting for the system to renew them automatically upon expiration. This feature also allows you to export the list of Service Agreements that are ready for renewal, which can be used to create a “Word Merge” if you want to send renewal letters to your customers in advance. The export will include the current contract sales price as well as the new contract amount with and without sales tax. The Mass Renewal Feature can be accessed from the “Agreements” Menu Option and will allow you to filter the agreements by the Expiration Month/Year, Agreement Type and Renewal option. You also have the option to send or not send the Renewal Communication. **NOTE** – If you have a lot of Service Agreements, the system may take several minutes to complete the Renewal Process. If you click the Renewal Status button from the Mass Renewal Screen, you will be able to see the progress and whether it is still processing or if it has completed processing.

Agreements (711)

Mass Renewal Print Export

Number	Reference Id	Customer Name	Info	Plan	Start Date	Expiry Date	Renewal Date	Status	Actions
SA-524		Dave Stable		Gold 1 Annual	01/26/2022	01/25/2023		Active	View
SA-156		Roberts, Scott		Gold 1 Monthly	10/15/2018	10/14/2019		Inactive	View
SA-542		Starbucks #145		Commercial - Custom	02/01/2022	01/31/2023		Active	View
SA-535		Smith, Janet		Silver 1	01/26/2022	01/25/2023		Active	View

Mass Renew Service Agreements

1. Select your Filters

Renewal Status Print Export Renew

Expiration Month: April | Expiration Year: 2022 | Agreement Type: All | Renewal Option: Set to auto renew | Send Renewal Communication: YES

Number	Customer Name	Address	Plan	Expiry Date	Current Amt	New Ar	3. Click the Renew Button
<input checked="" type="checkbox"/> SA-457	Anderson, Bruce	5854 Inverness Circle Fort Myers 33903	Gold 2 Annual	04/30/2022	\$432.26	\$432.26	✓
<input checked="" type="checkbox"/> SA-124-02		5450 Inverness Circle Suite Myers 33903	Gold 1 Annual	04/30/2022	\$300.00	\$350.00	✓
<input type="checkbox"/> SA-116-02		4 Enterprise Pkwy Fort rs 33901	Gold 1 Annual	04/27/2022	\$300.00	\$350.00	✓
<input checked="" type="checkbox"/> SA-113-02	Strong, Roger 1234	4520 Pinehurst Greens Ct Estero 33928	Gold 1 Annual	04/24/2022			✓
<input type="checkbox"/> SA-112-02	Hennessey, Erin	11451 Persimmon Ct Forty Myers 33913	Gold 1 Annual	04/24/2022			✓

2. Select the Agreements you want to Renew

4. Click the Renewal Status to see the progress of renewal, or which agreements got renewed

Renewal Status

Message	Created By	Created Date	Status
SA mass renewal: SA-565, SA-562, SA-563	Nate	03/24/2022 07:26 PM	Completed
SA mass renewal: SA-110-03, SA-128-02, SA-115-02	Nate	03/22/2022 05:30 PM	Completed
SA mass renewal: SA-461	William	03/22/2022 10:00 AM	Completed

The Ability to Manually Mass Create Service Agreement Invoices has been Added

The ability to manually mass create Service Agreement Invoices has been added to the system. The system was initially designed to automatically create Service Agreement Invoices on a pre-defined schedule, eliminating the need for manual intervention. However, some customers prefer to manually create their Service Agreement invoices prior to the scheduled creation date and send them out all at once. As a result, we added a new button to the Invoices Menu for Mass Creation. This will allow you to pick a starting and ending date, an agreement type and billing type and manually create the Service Agreement invoices selected in bulk. This feature is a nice complement to the ability to Mass Renew service agreements. If you Mass Renew your Service Agreements in advance, you may want to also send the invoices in advance, which this feature will allow you to do.

All Invoices (5215)

Mass Creation Print Export

Search by Customer

Invoice #	Site Name	WO #	PD #	Invoice Date	Due Date	Total	Balance	Technician	Action	Saved
A-4938	Cambell, Roger	WO-5611		04/04/2022	04/04/2022	\$416.58	\$416.58			✓
A-4939	Cambell, Roger	WO-5612		04/04/2022	04/04/2022	\$416.58	\$416.58			✓
F-4940	Smith, Randy	WO-5614		04/04/2022	04/04/2022	\$38.16	\$38.16	Bobby		✓
A-4952	Gateway Property Management	WO-5627		04/05/2022	04/20/2022	\$108.63	\$0.00			✓

Mass Create Service Agreement Invoices

1. Select your Filters

Creation Status Create

Start Date: 04/05/2022 End Date: 04/30/2022 Agreement Type: All Billing Type: Bill from Office

Number	Customer Name	Plan	Billing Date	Bill Amount	Billing Type
SA-451	O'Rourke, Lisa	Gold 1 Annual	04/13/2022	\$150.00	Bill from office
SA-559		Test Plan	04/15/2022	\$0.00	Bill from office
SA-524		Gold 1 Monthly		\$25.00	Bill from office
SA-163-02	Stamkos, Steven	Gold 1 Annual		\$150.00	Bill from office

2. Select the Agreement Invoices you want to Create

3. Click the Create Button

4. Click the Creation Status to see the Creation progress. The status will show "Completed" once all invoices have been processed.

NOTE – After the invoices have been processed, the system will show a number next to the “Bell Icon” at the top of the screen. Clicking on the Icon will show you any notifications having to do with the processing of Invoices. Clicking on one of the notifications will remove it from the Alert.

Notifications

INV-PDF-Batch-33 has been .. Created

SA invoice mass creation : Batch-04-05-2022-to-04-30-2022-jxE8g.. Completed

“Call Back” Tracking has been added to the System

A new “Call Back” slider has been added to the Invoice Screen. If you enable the slider, you will be prompted for the Original Work Order Number. Once you select the Original Work Order Number, the screen will display the original Lead Technician. **NOTE** – A Call Back Report will be added to the system in the near future

The “Easy Edit/View” Popup has been added to the Description field in the Quotes Module

The “Edit/View” feature that was added to the Invoice screen in the last update has been added to the Quotes Module. You will notice a new icon in the Description field on Quotes. Clicking this icon will open an “Edit Description” box that displays the description of the field selected and allows you to edit the data. This will make it faster and easier to view or edit long descriptions on the Quote in ServiceFactor. If you only want to view the data, use the “Cancel” button at the bottom of the screen or click the “X” at the top of the popup to close the screen. If you made an edit and want to save it, use the Save button to save any changes

A Markup Calculator Has Been Added to the Quotes Screen

A Markup Calculator has been added to the Quotes Screen that will calculate the Sell Price based on the Markup Table selected for the Quote and the cost of an Item. Simply click the “Calculator” icon next to the “Search and Select” field and enter the Cost of an Item. The calculator will automatically calculate the Sell Price based on the Markup Table listed. This is useful if you do not have your costs defined properly for an item that you are using on a Quote. For example you might have a generic item that you use for ordering items that you don’t typically sell. **NOTE** – You will need to manually enter the Sell Price in the “Rate” field for the particular item.

The screenshot displays the 'Quote' screen with a 'Markup Calculator' modal open. The modal is titled 'Markup Calculator' and contains a dropdown for 'Markup' set to 'Standard - 110'. Below this is a text input field labeled 'Enter Cost' with the value '83.00'. Underneath, it shows 'Calculated Sell Price (Rate)' as '\$219.95'. A red box highlights the 'Enter Cost' field and the calculated price. A red callout box with an arrow pointing to the calculator icon in the 'Search and select' field contains the text: 'Click the Calculator Icon to open the Markup Calculator and enter the Cost of the item. The system will automatically calculate the sell price based on the Markup Table listed.'

Quote

633 Res HVAC Service William Existing Customer

PO # Class Markup Problem Code

Residential Standard - 110 Res - No Cool

Tags

Good +

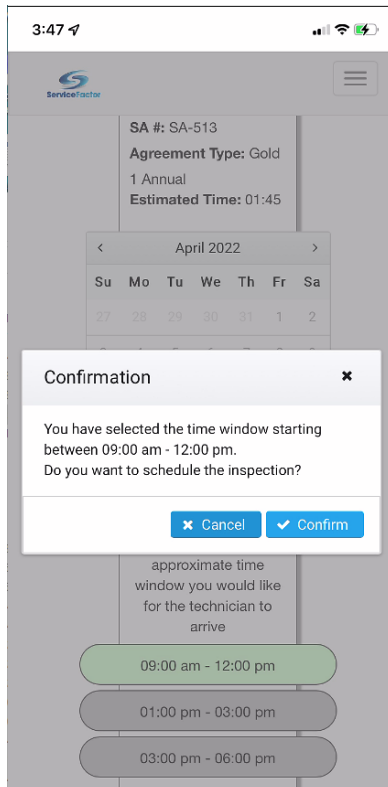
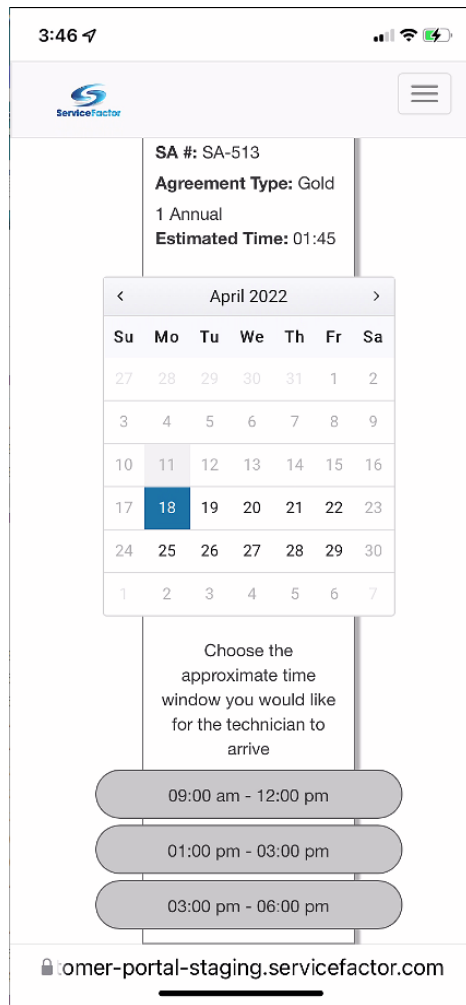
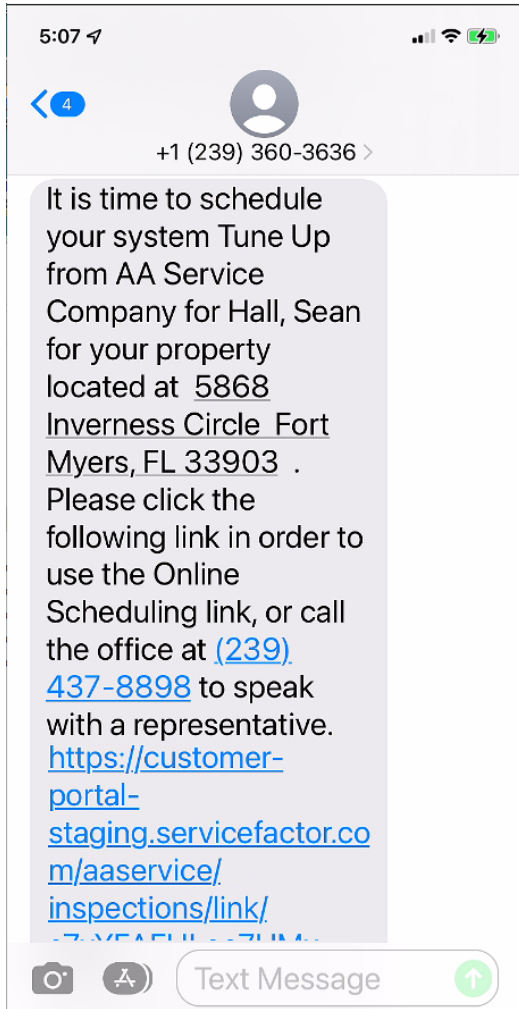
Quote Items

Item	Description
MOT002	1/4 hp 1075 RPM 230V Condensor Motor

Search and select

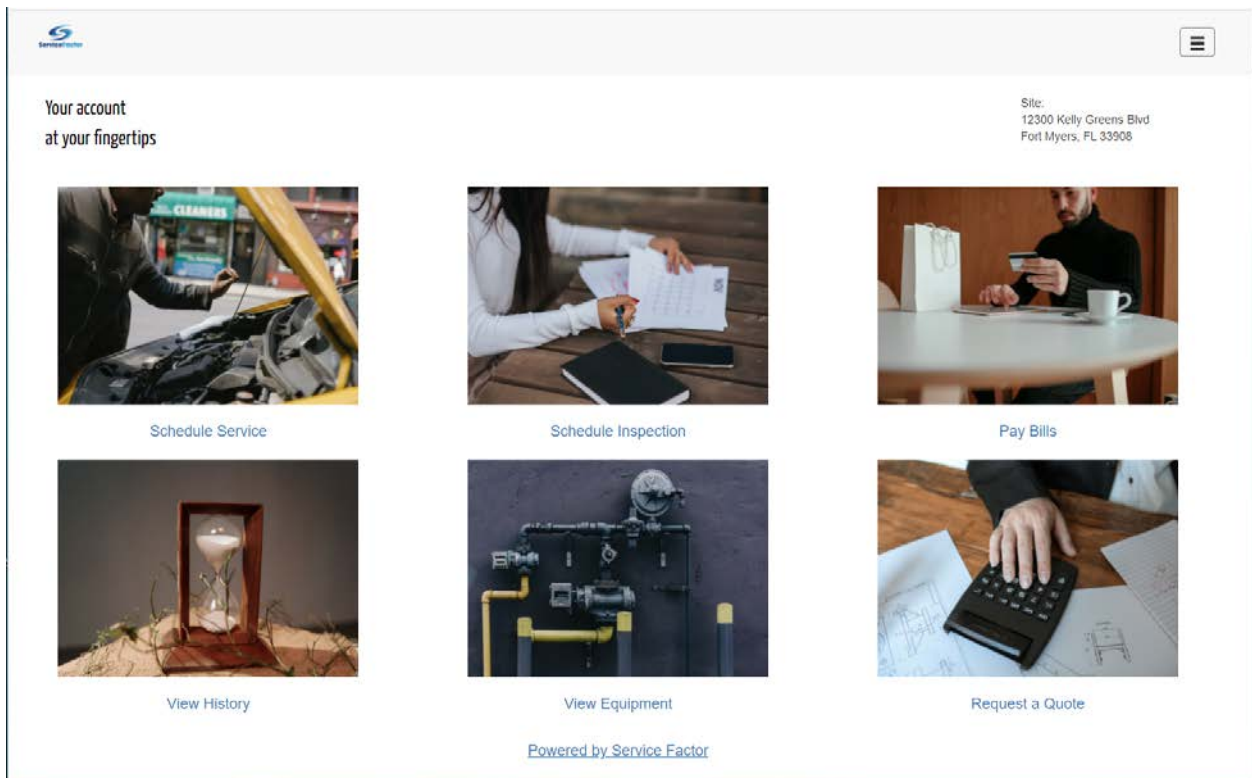
Customers Can Now Schedule Their Inspections Online (Beta)

A new feature has been added to the Service Agreements that will allow your customers to schedule their inspections online. If you set up a Service Agreement to allow online scheduling, an email and/or text message will be sent to the customer indicating that it is time for them to schedule their inspection along with a link for online scheduling. When the customer clicks the link, it will take them to a calendar showing available dates. When they choose a date, it will show them available appointment time windows from which they can choose. Once they choose a time window and confirm, the system will automatically add the call to the schedule for the appropriate date and time based on what technician has the appropriate skill level and has been assigned to the customer’s zone. Imagine the time and money you will save by having the customer schedule their inspections without ever having to speak to someone at the office. Online scheduling is quick, easy and convenient and allows the customer to schedule their inspections when it is convenient for them to schedule it, as opposed to being interrupted by a phone call from your office during the day.



Customer Portal has Been Introduced (Beta)

A new Customer Portal feature has been added to the system that will allow your customer to access their account and perform various functions, such as viewing their history, viewing their equipment, pay their bills online, schedule a service call, view their inspection schedule and schedule an upcoming inspection and request a quote. This feature gives you the option to include or exclude any of the features from the Customer Portal. Imagine how convenient it will be for your customers to schedule a service call online at any hour of the day, pay their bills online, view their history, schedule their inspection, etc. without ever having to pick up the phone. The Customer Portal can be accessed from a regular computer or from a Smart Device such as an Apple or Android phone.



The screenshot displays the Service Factor Customer Portal interface. At the top left is the Service Factor logo. On the right, there is a menu icon and account information: "Site: 12300 Kelly Greens Blvd Fort Myers, FL 33908". Below this, the text "Your account at your fingertips" is displayed. The main content area features six service options, each with a representative image and a caption: "Schedule Service" (mechanic at car), "Schedule Inspection" (person with documents), "Pay Bills" (person with card), "View History" (hourglass), "View Equipment" (gas meter), and "Request a Quote" (hand with calculator). At the bottom center, it says "Powered by Service Factor".

Service Factor

Your account at your fingertips

Site:
12300 Kelly Greens Blvd
Fort Myers, FL 33908

Schedule Service

Schedule Inspection

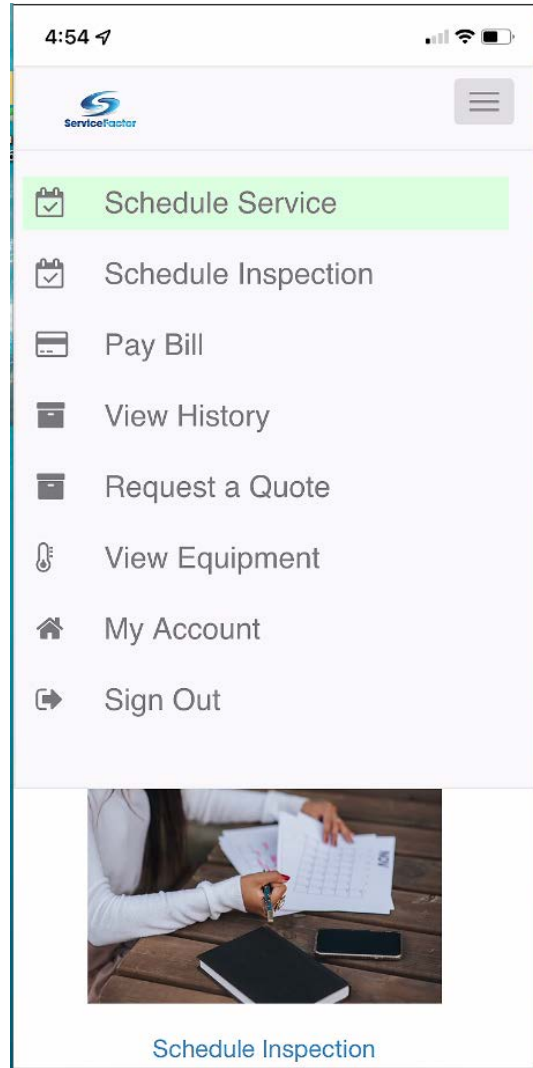
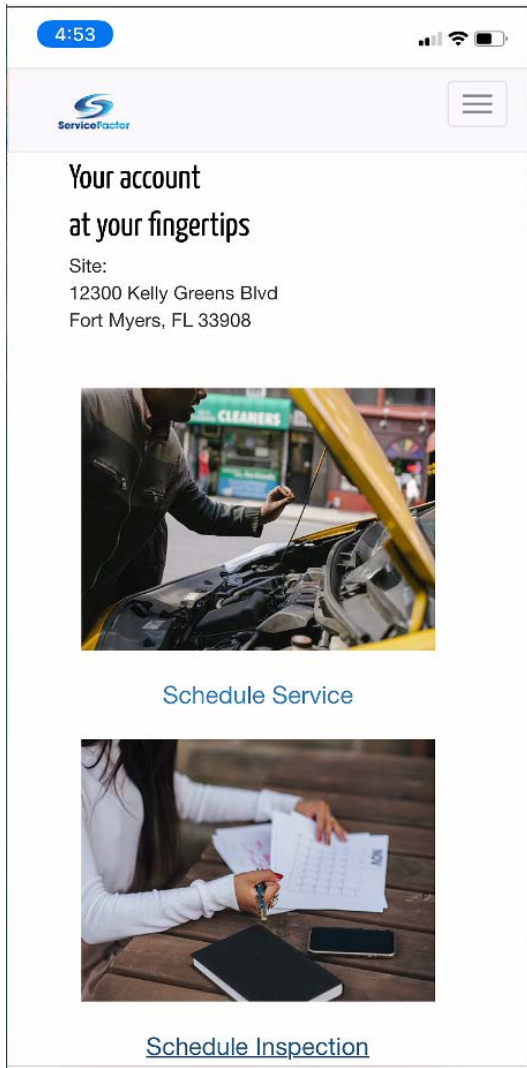
Pay Bills

View History

View Equipment

Request a Quote

Powered by Service Factor



Schedule Service

Select Problem

Reset

If leak is major, turn off the water to the faucet which is typically under the sink or may be in a central control panel if you have a Pex type system.

Describe the issue you are experiencing

Faucet has a steady drip that just started in the past couple of days.

Select Date/Time

April 2022						
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Choose the approximate time window you would like for the technician to arrive

09:00 am - 11:00 am

01:00 pm - 04:00 pm

Schedule Service

Select Problem

Reset

If leak is major, turn off the water to the faucet which is typically under the sink or may be in a central control panel if you have a Pex type system.

Describe the issue you are experiencing

Faucet has a steady drip that just started in the past couple of days.

Confirmation ✕

You have selected the time window starting between 09:00 am - 11:00 am. Do you want to schedule the call?

✕ Cancel
✓ Confirm

Select Date/Time

April 2022						
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Choose the approximate time window you would like for the technician to arrive

09:00 am - 11:00 am

01:00 pm - 04:00 pm

Dispatch Board

Choose Board

Day Shift Full Shift Toggle Today < April 13 2022, Wed > Day Week

8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM
<div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> OH 1 - On Hold </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> I 2 - Incom... </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> Bobby </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> Brett </div> <div style="border: 1px solid gray; padding: 5px;"> CT Chuck Tu... </div>							
<div style="border: 1px solid gray; padding: 5px; display: inline-block; margin-bottom: 10px;"> 🛑 Kelly Greens 🟢 Res - Plbg Service </div>							

Call Scheduled via the Customer Portal is automatically assigned to an appropriate technician with the proper skill level that is assigned to the customer's zone for the time frame requested.