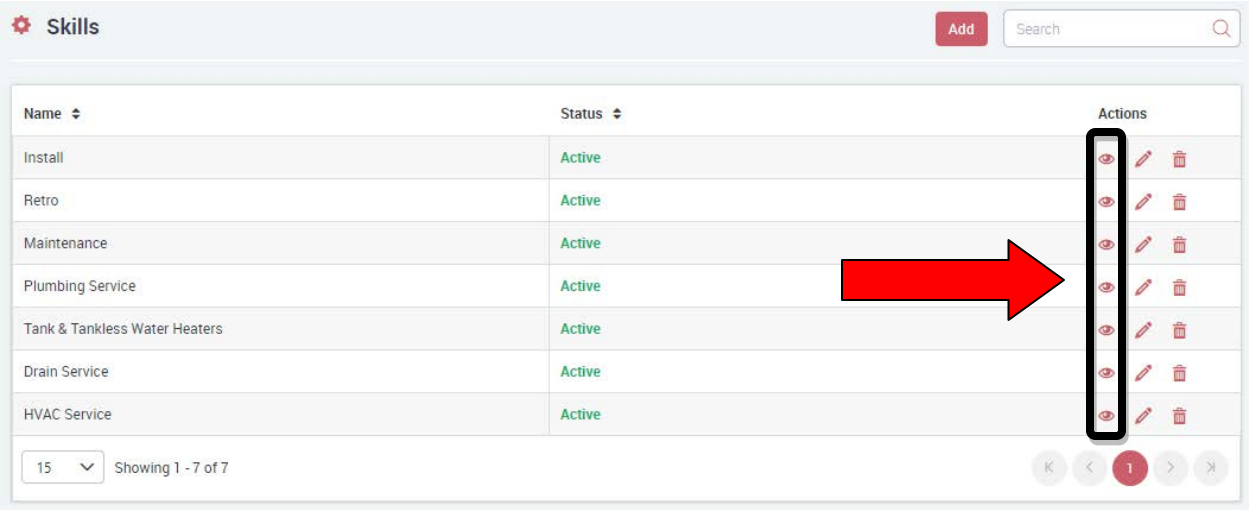
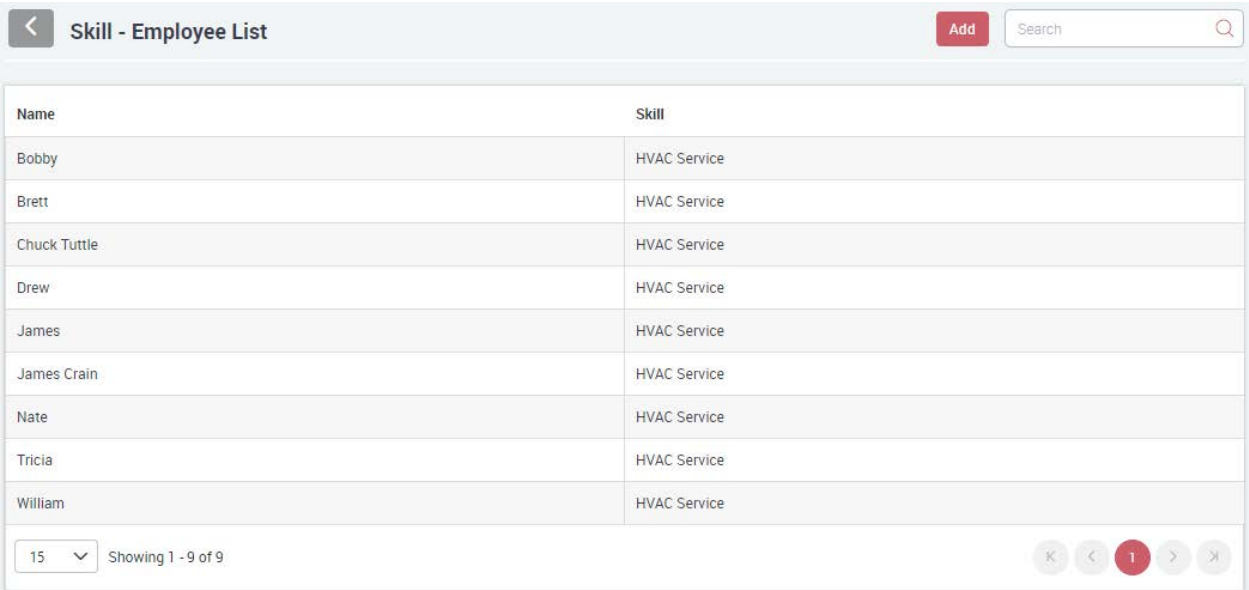
SF Release Notes: May 27, 2020

Employee Skills – New view option allows you to see what techs are assigned to a particular skill

A new view option has been added to the Employee Skills listing that will allow you to view all employees assigned to a particular skill. In the list of Skills there is now a view icon, which looks like an eyeball. Clicking the eyeball icon will list all employees that have been assigned the particular skill.

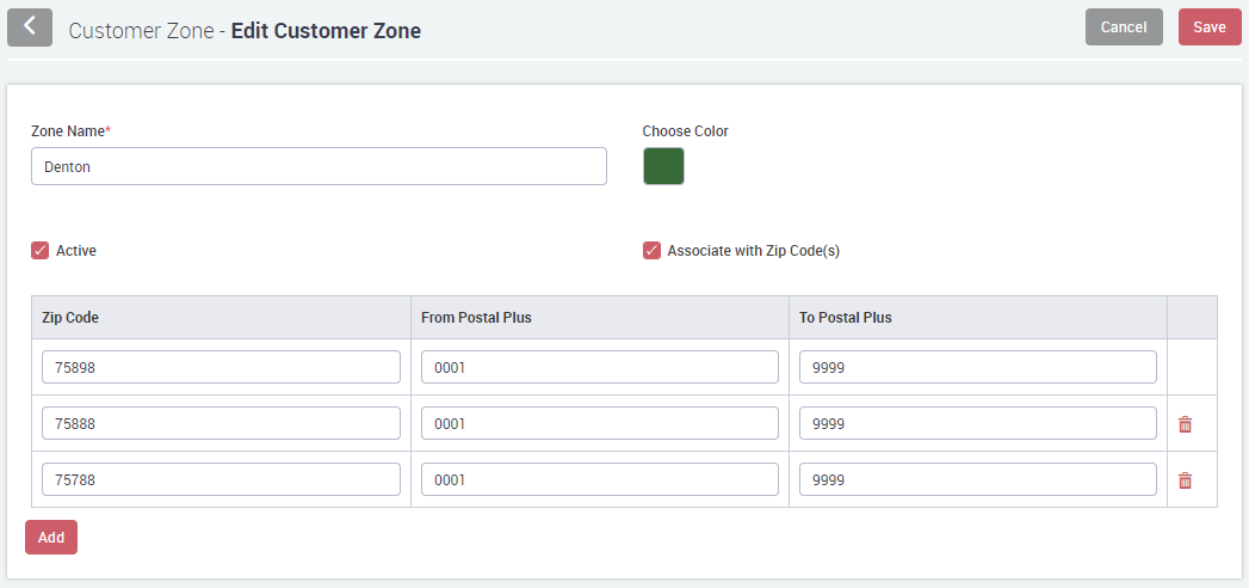


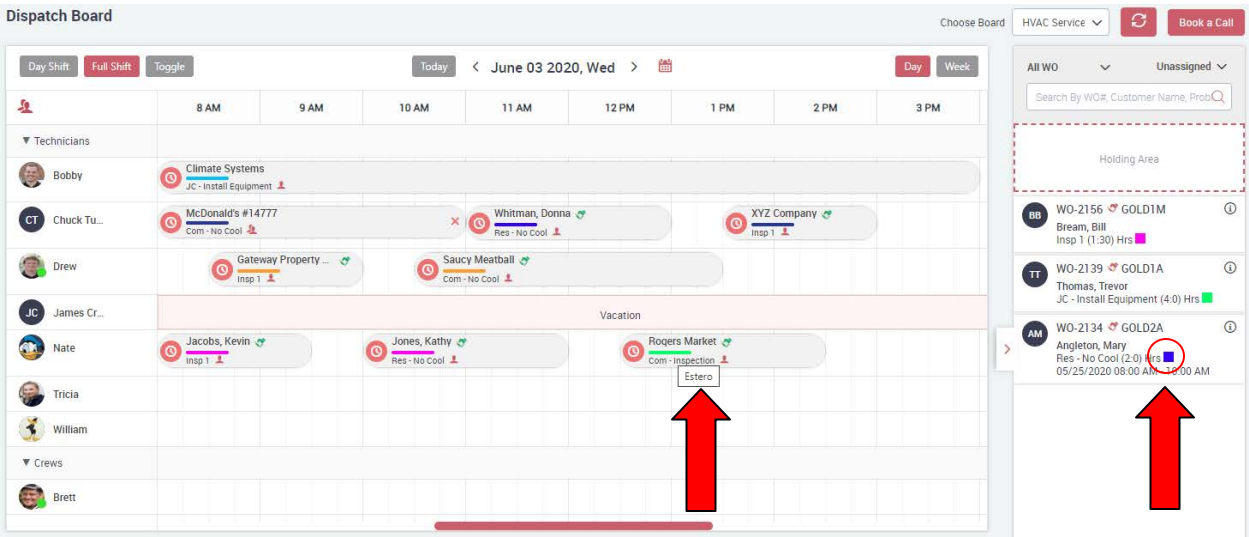


Zones – A new utility is available for updating customer records with a zone based on their Zip Code

A new utility is available that will fill in the Zone field of the customer file based on the Zip Code of the customer. Once you have added zones to the Zone file and associated them with a Zip Code, a ServiceFactor Support Tech can run the utility that will update the customer file with the appropriate Zone. The zones will appear in the Work Order file and on the Dispatch Board allowing the Dispatcher to optimize a technician's schedule. The zone color will appear on the Dispatch Board cards below the Customer's Name and next to the Problem Code in the Unassigned Column.

Helpful Tip – You can hover your mouse over the Zone Color on the Dispatch Board and the Zone Name will appear as a tool tip, or you can opt to temporarily display the Zone Name on the Dispatch Card as opposed to the Problem Code if you desire.

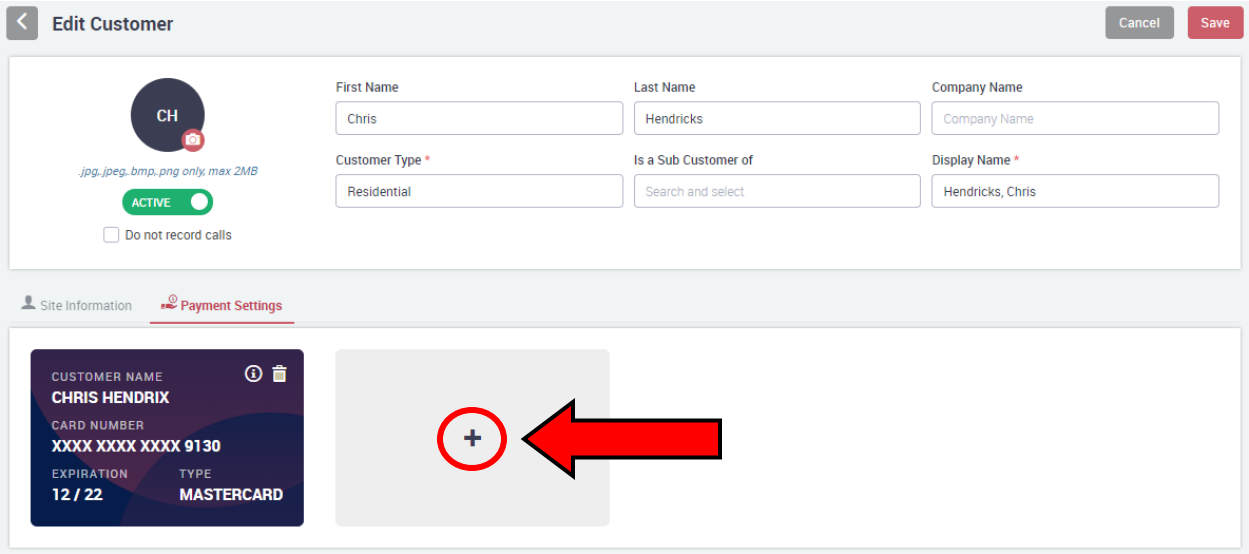


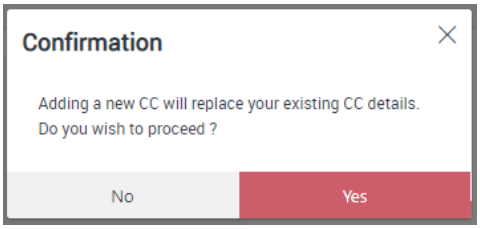


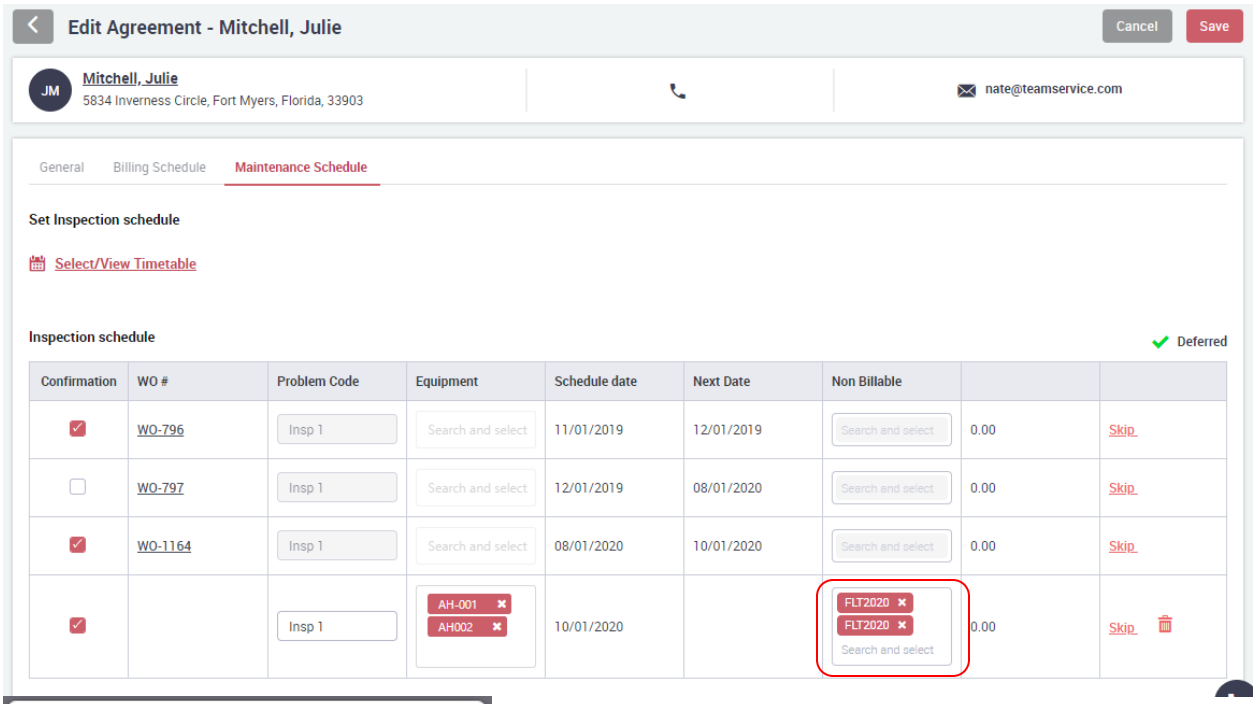
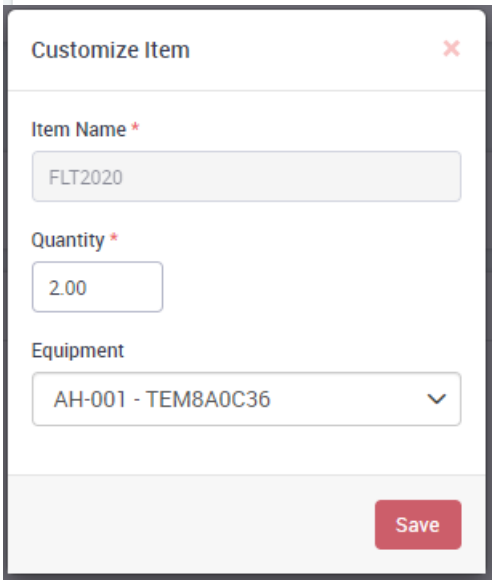
Replacing Stored Credit Card – Now easier and does not require disassociating card from Service Agreement prior to replacing the existing card on file

You can now replace an existing stored credit card in the system without having to disassociate the credit card number from any existing Service Agreements. To replace an existing card on file, find the customer and go to the Payment Settings screen. Click the "+" icon next to the existing credit card, acknowledge that you understand adding a new Credit Card will replace the existing card on file, and proceed to fill out the information. This will replace the existing Credit Card, save the new Credit Card to the customer file and use the new Credit Card for any automatic credit card transactions or card on file transactions.

NOTE – The system does not store the actual Credit Card number, it stores the Credit Card information as an alias that is PCI Compliant. The last 4 digits of the Credit Card number are also stored for identification purposes.





Service Agreements – You can now add non-billable items multiple times per inspection schedule

You can now add non-billable items multiple times per inspection. Prior to this release, you were limited to only being able the item one time. Now you can add the item multiple times, whether it be for no equipment, one piece of equipment or multiple pieces of equipment. Once you select an item, you will have the choice to choose which piece of equipment you want to associate it with, if applicable, as well as enter the quantity of the item needed.