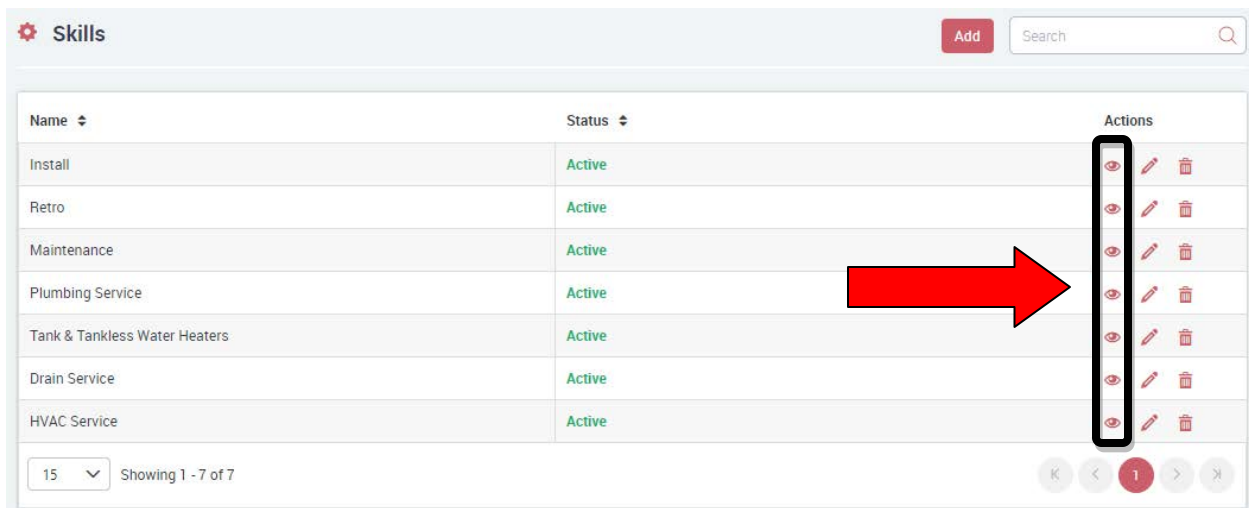























# SF Release Notes: May 27, 2020

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

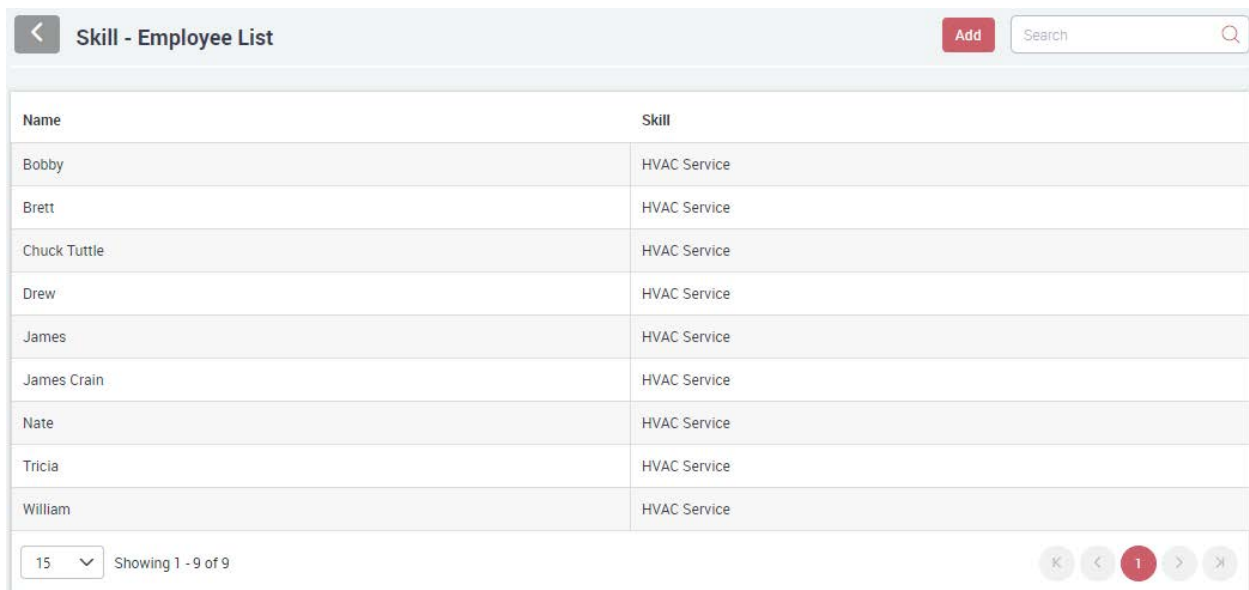
A new view option has been added to the Employee Skills listing that will allow you to view all employees assigned to a particular skill. In the list of Skills there is now a view icon, which looks like an eyeball. Clicking the eyeball icon will list all employees that have been assigned the particular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



**Skills** Add Search

Name	Status	Actions
Install	Active	  
Retro	Active	  
Maintenance	Active	  
Plumbing Service	Active	  
Tank & Tankless Water Heaters	Active	  
Drain Service	Active	  
HVAC Service	Active	  

15 Showing 1 - 7 of 7



**Skill - Employee List** Add Search

Name	Skill
Bobby	HVAC Service
Brett	HVAC Service
Chuck Tuttle	HVAC Service
Drew	HVAC Service
James	HVAC Service
James Crain	HVAC Service
Nate	HVAC Service
Tricia	HVAC Service
William	HVAC Service

15 Showing 1 - 9 of 9

## 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.

Customer Zone - Edit Customer Zone

Zone Name\*  
Denton

Choose Color  
Green

Active  Associate with Zip Code(s)

Zip Code	From Postal Plus	To Postal Plus
75898	0001	9999
75888	0001	9999
75788	0001	9999

Add

Dispatch Board

Today < June 03 2020, Wed >

8 AM 9 AM 10 AM 11 AM 12 PM 1 PM 2 PM 3 PM

Technicians: Bobby, Chuck Tu..., Drew, James Cr..., Nate, Tricia, William, Brett

Work Orders: Climate Systems, McDonald's #14777, Gateway Property..., Jacobs, Kevin, Jones, Kathy, Rogers Market, Whitman, Donna, XYZ Company, Saucy Meatball

Unassigned Work Orders: WO-2156, WO-2139, WO-2134

Red arrows point to the 'Esterio' tooltip for Rogers Market and the 'Esterio' tooltip for WO-2134.

## 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.

The screenshot shows the 'Edit Customer' interface. At the top, there is a navigation bar with a back arrow, the title 'Edit Customer', and 'Cancel' and 'Save' buttons. Below this is a customer profile card for 'Chris Hendricks'. The profile card includes a profile picture with initials 'CH', a status indicator 'ACTIVE', and a checkbox for 'Do not record calls'. The profile card also displays fields for 'First Name' (Chris), 'Last Name' (Hendricks), 'Company Name' (Company Name), 'Customer Type' (Residential), 'Is a Sub Customer of' (Search and select), and 'Display Name' (Hendricks, Chris). Below the profile card, there are two tabs: 'Site Information' and 'Payment Settings'. The 'Payment Settings' tab is active and shows a credit card for 'CHRIS HENDRIX' with a card number 'XXXX XXXX XXXX 9130', expiration date '12 / 22', and type 'MASTERCARD'. To the right of the credit card is a red circle with a plus sign, and a red arrow points to this icon.

The confirmation dialog box has a title 'Confirmation' and a close button (X). The text inside reads: 'Adding a new CC will replace your existing CC details. Do you wish to proceed?'. At the bottom, there are two buttons: 'No' and 'Yes'.

## 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.

← Edit Agreement - Mitchell, Julie Cancel Save

**Mitchell, Julie**  
JM 5834 Inverness Circle, Fort Myers, Florida, 33903 📞 ✉ nate@teamservice.com

General Billing Schedule **Maintenance Schedule**

Set Inspection schedule  
[Select/View Timetable](#)

Inspection schedule ✔ Deferred

Confirmation	WO #	Problem Code	Equipment	Schedule date	Next Date	Non Billable		
<input checked="" type="checkbox"/>	<a href="#">WO-796</a>	Insp 1	Search and select	11/01/2019	12/01/2019	Search and select	0.00	<a href="#">Skip</a>
<input type="checkbox"/>	<a href="#">WO-797</a>	Insp 1	Search and select	12/01/2019	08/01/2020	Search and select	0.00	<a href="#">Skip</a>
<input checked="" type="checkbox"/>	<a href="#">WO-1164</a>	Insp 1	Search and select	08/01/2020	10/01/2020	Search and select	0.00	<a href="#">Skip</a>
<input checked="" type="checkbox"/>		Insp 1	AH-001 ✖ AH002 ✖	10/01/2020		FLT2020 ✖ FLT2020 ✖ Search and select	0.00	<a href="#">Skip</a> 🗑

Customize Item ✖

Item Name \*

Quantity \*

Equipment

Save

