

SF Release Notes: August 28, 2024

New Change Ownership Procedure

You now have the ability to easily Change the Ownership of a customer in ServiceFactor. Changing ownership will create a new customer record, move the equipment from the original customer to the new customer, add the history from the original customer to the “Imported History” tab of the new customer and will inactivate the original customer in ServiceFactor. This feature will allow you to maintain the history with the original customer and if the original customer still owes you money, it will maintain the open invoices with the original customer in both ServiceFactor and QuickBooks. Any equipment from the original customer will now be associated with the new customer.

NOTE – In order to change ownership, all work orders, invoices, quotes and jobs will need to be completed and/or posted or voided. In addition, any active service agreements for the original customer will need to be inactivated.

NOTE 2 – The Change Ownership feature is typically used when a location is sold to a new owner. Some examples would be if a homeowner sells their house and you are now going to do work for the new home owner, or a restaurant is sold to a completely new owner, for whom you will now do work, etc. Change Ownership is different than making a customer a “Sub Customer of” another customer. A “Sub Customer of” is typically used when one customer owns multiple sites, such as rentals, multiple franchise locations, etc.

NOTE 3 – Once the Change Ownership process has been completed, you will no longer be able to add work orders, quotes, service agreements, jobs, equipment or invoices to the original owner. However, you will be able view history, view past jobs, view prior quotes, view prior work orders and apply payments to any open invoices for the original owner.

Edit Customer [Cancel] [Save]

Customer Profile:
Profile picture: RR
Status: ACTIVE
Do not record calls:
Change Owner (highlighted with a red box and arrow)

Form Fields:
First Name: Robert
Last Name: Reed
Company Name: Company Name
Customer Type: Residential
Is a Sub Customer of: Search and select
Display Name: Reed, Robert
Tags:
Credit Hold: NO
Email Invoices: NO
Submit Invoice Online: NO

Navigation: Site Information | Payment Settings | Customer Portal

SITE ADDRESS:
Address Line 1: 6360 Coccos Drive
Address Line 2:
Coordinates: 26°28'45.0"N 81°51'35.7"W

Callout Box: Use the Change Owner button in the customer file to change the ownership from the original customer to a new customer

Change Owner ✕

This will create a new customer record with the address from the original customer, move the equipment from the original customer to the new customer, copy the history from the original customer to the "Imported History" of the new customer and inactivate the original customer. Once this process has been completed, you will no longer be able to use the original customer.

**6360 Cocos Drive
Fort Myers, FL 33908**

First Name	Last Name	Company Name	Display Name *
<input type="text" value="Richard"/>	<input type="text" value="Beck"/>	<input type="text" value="Company Name"/>	<input type="text" value="Beck, Richard"/>


Primary Contact:

Name	Mobile	Phone	Email
<input type="text" value="Richard"/>	<input type="text" value="Mobile"/>	<input type="text" value="(239) 437-8898"/>	<input type="text" value="Richard@richard.com"/>

Customer Type *	Terms *	Lead Source	
<input type="text" value="Residential"/>	<input type="text" value="Due on receipt"/>	<input type="text" value="Angies List"/>	
Tax Group *	Markup	Labor Rate Type	Sales Rep
<input type="text" value="Florida 6.5"/>	<input type="text" value="Standard - 110"/>	<input type="text" value="Residential"/>	<input type="text" value="Search and select"/>
Bill From Office	Purchase Order Required		
<input type="radio" value="NO"/>	<input type="radio" value="NO"/>		

Enter the new Owners' information and save the record to complete the change ownership procedure

View Customer Customer Center Edit



.jpg, .jpeg, .bmp, .png only; max 2MB

ACTIVE

Do not record calls

First Name	Last Name	Company Name
<input type="text" value="Richard"/>	<input type="text" value="Beck"/>	<input type="text" value="Company Name"/>

Customer Type * Is a Sub Customer of Display Name *

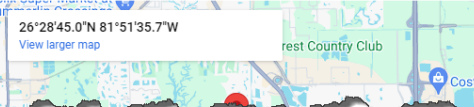
Tags Credit Hold Email Invoices Submit Invoice Online

After completing the 'Change Ownership', a new customer record will be created from the original customer's address

SITE ADDRESS

Address Line 1 *	Address Line 2
<input type="text" value="6360 Cocos Drive"/>	<input type="text" value="Address Line 2"/>

City State Code Zip Zone Color Country



View larger map

Customer Details
 RB
 Beck, Richard
 6360 Cocos Drive, Fort Myers, Florida, 33908
 (239) 437-8898
 Richard@richard.com

Timeline
 Last - 08/27/2024
 On Record - 1

Work Orders
 Open - 0
 Completed - 0

Equipment
 Total - 2

Agreements
 Active - 0
 Total - 0

Invoice
 Invoiced - \$0.00
 Balance - \$0.00

Quotes
 Total - 0

Job
 Total - 0
 Open - 0

All Years Keyword Search

08/27/2024
 TMS Admin
 Created through Change Ownership from customer Reed, Robert.
 11:30 AM

Attachments(0)
 Enter Description
 No records found.

Additional Information [History](#)

Payment Status - Posted Invoices
 Overdue Open
 \$ 0.00 \$ 0.00

Credit hold NO [Site Notes](#)

Site Tags
 None

Agreement
 None

Equipment
 AC-101 - AC
 AH001 - Air Handler

The timeline will show that the new customer was created via Change Ownership from the original customer

The Equipment was also moved from the original customer to the new customer

Customer History

WO-9843	07/11/2024	WO-9843
A-8645	\$ 190.00	
WO-7962	08/07/2023	Call Date
A-6951	\$ 0.00	A-8645
WO-7849	07/13/2023	Invoice #
A-6840	\$ 175.00	08/27/2024
WO-7167	03/17/2023	Invoice Date
F-6232	\$ 100.00	08/27/2024
WO-6125	07/14/2022	Dispatch Date
A-5375	\$ 150.00	Amount
WO-5160	01/13/2022	
A-4545	\$ 0.00	
WO-4203	07/08/2021	
A-3680	\$ 150.00	

Lead Technician
James

Hours
2.02

Site Address
Beck, Richard
, 6360 Cocos Drive, Fort Myers, Florida, 33908
, (239) 437-8898 , Richard@richard.com

Resolution
 Insp 1
 PMA 1 Annual QTY 1.00 ID : AC-101 - 4TTR6048J FLT2020 QTY 1.00 ID : AC-101 - 4TTR6048J

Invoice Text
 FLT202020 X 20 X 1 Disposable Filter
 PMA 1 AnnualAnnual Service Agreement 1 System - Please refer back to your approved agreement

History from original customer will be added as "Imported History" to the new customer

All Customers (1) Filters Applied : reed [Clear All](#)

Show Customer Hierarchy

Name	Address	Phone	Mobile	Email	Join Date	Status	Create Work Order	Action
Reed, Robert-OC	6360 Cocos Drive Fort Myers Florida 33908	(239) 555-6556		nmtuttle@earthlink.net	03/04/2019	Inactive		View

15 Showing 1 - 1

Original customer has been inactivated

Customer Details: Reed, Robert-OC
6360 Cocos Drive, Fort Myers, Florida, 33908
(239) 555-6556
nmtuttle@earthlink.net

Timeline: Last - 08/27/2024, On Record - 66

Equipment: Total - 0

Agreements: Active - 0, Total - 5

Invoice: Invoiced - \$4,938.42, Balance - \$1,282.63

Timeline entry: 08/27/2024, TMS Admin, Ownership changed to customer Beck, Richard. 11:30 AM

Attachments(0)

Timeline for original customer indicates that the ownership was changed to the new owner and you can see that the equipment has been moved.

Customer Details: Reed, Robert-OC
6360 Cocos Drive, Fort Myers, Florida, 33908
(239) 555-6556
nmtuttle@earthlink.net

Timeline: Last - 08/27/2024, On Record - 66

Work Orders: Open - 0, Completed - 15

Equipment: Total - 0

Agreements: Active - 0, Total - 5

Invoice: Invoiced - \$4,938.42, Balance - \$1,282.63

Quotes: Total - 3

Invoices: Total Invoiced \$4,938.42

Source	Invoice #	Invoice Date	Due Date	Invoice Amount	Balance Amount	WO #	Posted	Action
SF	A-394	08/29/2019	08/29/2019	\$0.00	\$0.00	WO-439	✓	
SF	F-215	05/14/2019	05/14/2019	\$823.00	\$171.00	WO-227	✓	
SF	F-6232	03/17/2023	03/17/2023	\$106.50	\$106.50	WO-7167	✓	

Online Bill Pay will now give instructions to place a check mark next to each invoice you would like to pay

Users will now be prompted to place a check mark next to the Invoices they would like to pay when using the online bill pay feature. This should help eliminate confusion that some users experienced.



AA Service
11928 Fairway Lakes Drive
Fort Myers, FL 33913
(817) 881-3949

Anderson, Steve
18995 LBJ

Invoice List

Invoice #	Invoice Amt	Due Amount	Payment Amount
<input type="checkbox"/> A-7011	\$190.00	\$190.00	0.00
<input type="checkbox"/> F-8803	\$212.97	\$212.97	0.00

Invoice Totals: \$402.97
Total Due: \$402.97
Payment Total: 0.00

Please place a check mark next to each invoice you would like to pay.

Secure Payments Form

Card Info

Card number: [Redacted]
Date (MM/YYYY): MM / YYYY
CVV # (Security Code): [Redacted]

Submit

VISA, MasterCard, AMERICAN EXPRESS

An instructional note has been added to online bill pay instructing user to place a check mark next to each invoice they would like to pay. This should help eliminate any confusion.

Thank you for your prompt payment!

Enhanced Email Tracking

A new feature has been added that will allow you to view emails sent from ServiceFactor in an overview screen. In addition to the history of when and to whom emails were sent, rejected emails will be listed in a separate tab, so that they can be addressed. The email history and rejected emails will be displayed in the overview screen for 30 days.

Click the 'Mail' icon to view the Mail History. There are 2 tabs available, one for Mail History and the other that will list Rejected Emails

To	Subject	Type	Record Number	Send At	E-Mail Body
nmtuttle@mail.com	Invoice from AA Service Company	Invoice	F-8803	08/27/2024 12:39:18 PM	View
nmtuttle@link.net	AA Service Company Service Agreement Invoice	Workorder	WO-9822	08/27/2024 11:22:50 AM	View
nmtuttle@mail.com	Tech On the Way	Workorder	WO-9822	08/27/2024 11:12:43 AM	View
billy@me.com	Tech On the Way	Workorder	WO-10112	08/27/2024 08:51:13 AM	View
billy@me.com	Booking confirmation from AA Service	Workorder	WO-10112	08/27/2024 08:49:31 AM	View
tommy@jenny.com	SF Service Reminder	Workorder	WO-10093	08/26/2024 03:04:06 PM	View
tommy@jenny.com	Booking confirmation from AA Service	Workorder	WO-10110	08/26/2024 11:26:51 AM	View

Click the 'Rejected Emails' tab to view any rejected emails.

Rejected Email	Bounce Type	Type	Record Number	Updated At	E-Mail Body
billy@me.com	Transient	Workorder	WO-10112	08/27/2024 12:39:18 PM	View
billy@me.com	Transient	Workorder	WO-10112	08/27/2024 08:51:13 AM	View
tommy@jenny.com	Permanent	Workorder	WO-10093	08/26/2024 11:26:51 AM	View
tommy@jenny.com	Permanent	Workorder	WO-10110	08/26/2024 03:04:06 PM	View
bill@remax.com	Permanent	Invoice	A-8791	08/26/2024 11:26:51 AM	View
tommy@jenny.com	Permanent	Invoice	J-561	08/26/2024 03:04:06 PM	View

Showing 1 - 6 of 6

Click the 'View' hyperlink to view the Email Text

Email Body

Dear Billy Newton,

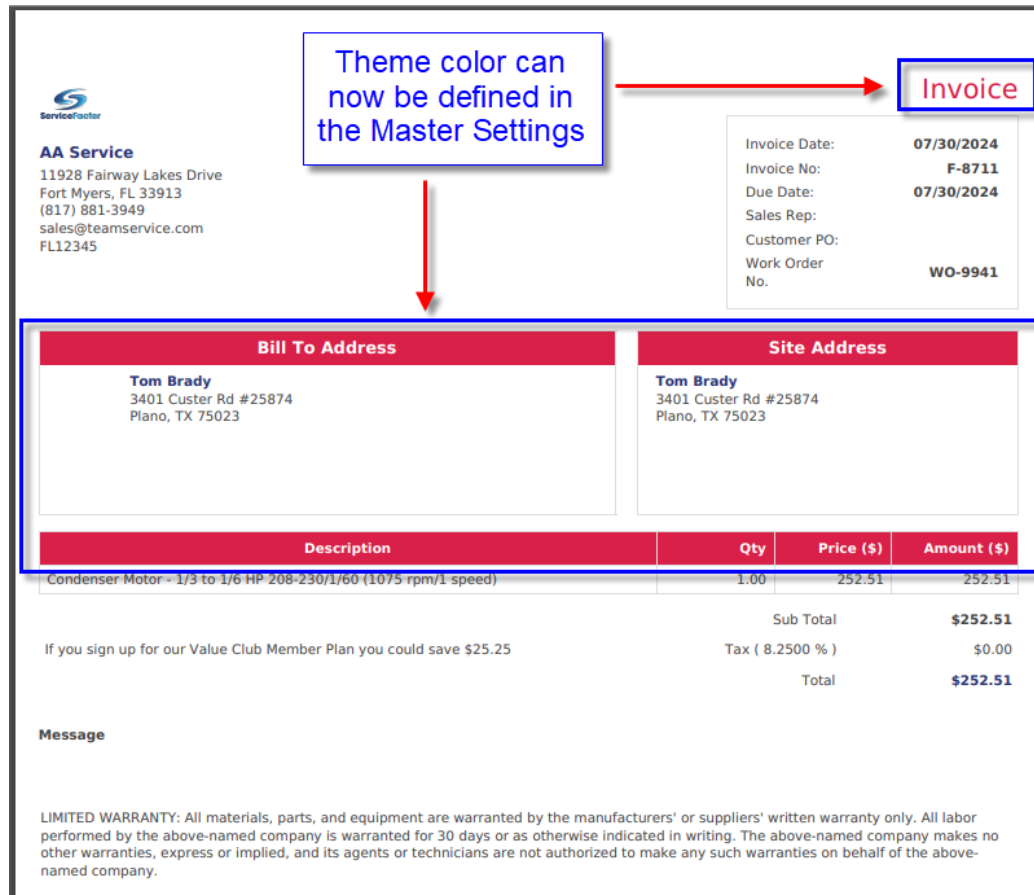
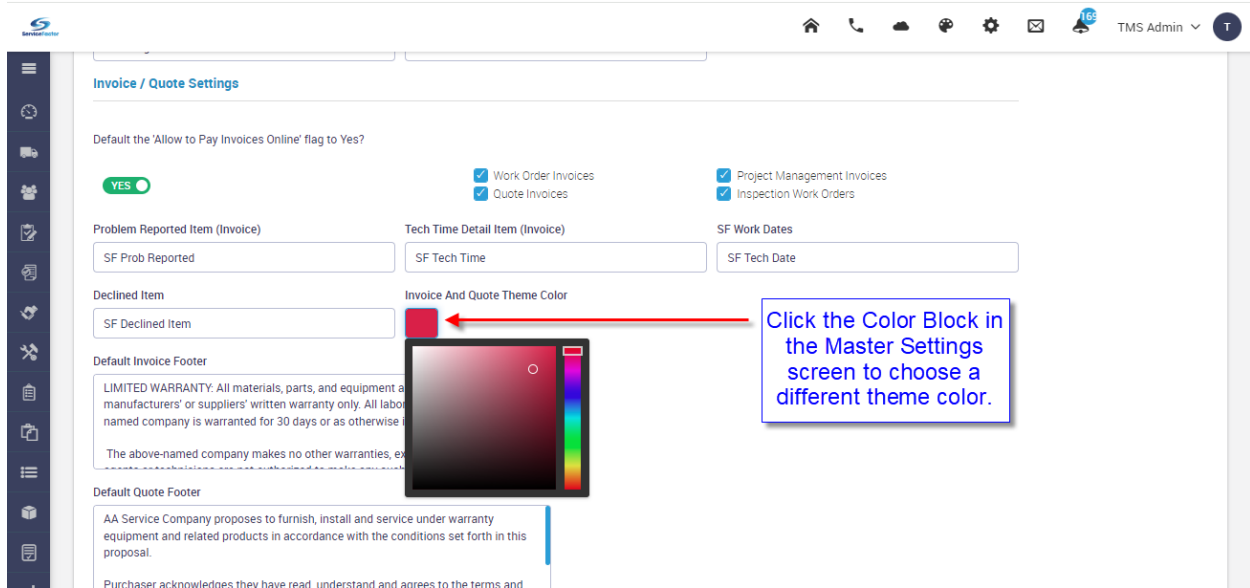
This email confirms that your work order number WO-10112 has been booked for 3401 Custer Rd #3333 Plano, TX 75023 . If you have any questions regarding your upcoming service, please do not hesitate to contact AA Service at (239) 437-8898.

AA Service Company
(239) 437-8898

Rejected Email	Bounce Type	Type	Record Number	Updated At	E-Mail Body
billy@me.com	Transient	Workorder	WO-10112		View
billy@me.com	Transient	Workorder	WO-10112		View


Invoices, Quotes, Purchase Orders, etc. – Ability to change the ‘Theme Color’ has been implemented

You now have the ability to change the “Theme Color” of Invoices, Quotes, Purchase Orders, etc. from the original blue default to a different color. This will be beneficial if your company logo colors clash with the blue default. To change the default color, click the “Invoice and Quote Theme Color” block in the Master Settings and choose a color.

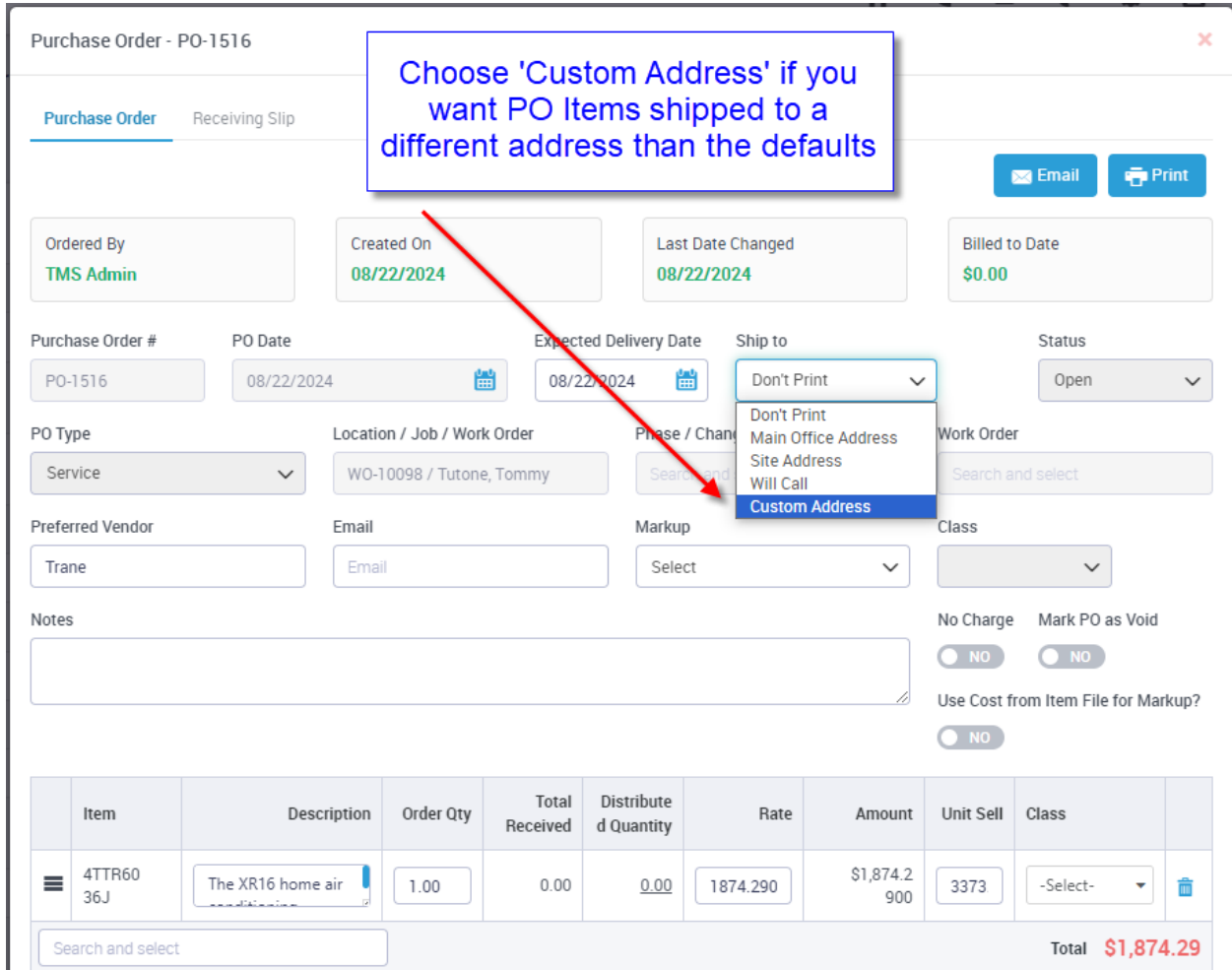


Purchase Orders – You can now enter a “Custom Ship To” address on Purchase Orders

A new ‘Custom Address’ option has been added to the ‘Ship to’ dropdown on Purchase Orders. If

you choose the ‘Custom Address’ option, you can click the  address icon to enter a custom address. This will use the Custom Address you enter on the printed or emailed Purchase Order.

NOTE – The custom address can be up to 4 lines and will print in the ‘Ship To’ section of the purchase order.



The screenshot shows a web interface for a Purchase Order (PO-1516). A callout box with a blue border and text says: "Choose 'Custom Address' if you want PO Items shipped to a different address than the defaults". A red arrow points from this box to the "Ship to" dropdown menu, which is open and shows the following options: "Don't Print", "Main Office Address", "Site Address", "Will Call", and "Custom Address". The "Custom Address" option is highlighted in blue. The form includes fields for "Ordered By" (TMS Admin), "Created On" (08/22/2024), "Last Date Changed" (08/22/2024), "Billed to Date" (\$0.00), "Purchase Order #", "PO Date", "Expected Delivery Date", "Status", "PO Type", "Location / Job / Work Order", "Phase / Change", "Preferred Vendor", "Email", "Markup", "Class", "Notes", and a table of items. The table has columns for Item, Description, Order Qty, Total Received, Distributed Quantity, Rate, Amount, Unit Sell, and Class. The total amount is \$1,874.29.

Purchase Order - PO-1516

Purchase Order Receiving Slip

Ordered By: TMS Admin

Created On: 08/22/2024

Last Date Changed: 08/22/2024

Billed to Date: \$0.00

Purchase Order #: PO-1516

PO Date: 08/22/2024

Expected Delivery Date: 08/22/2024

Ship to: Don't Print

Status: Open

PO Type: Service

Location / Job / Work Order: WO-10098 / Tutone, Tommy

Phase / Change: Search and select

Preferred Vendor: Trane

Email: Email

Markup: Select

Class: Search and select

Notes:

No Charge: NO

Mark PO as Void: NO

Use Cost from Item File for Markup?: NO

Item	Description	Order Qty	Total Received	Distributed Quantity	Rate	Amount	Unit Sell	Class
4TTR60 36J	The XR16 home air	1.00	0.00	0.00	1874.290	\$1,874.290	3373	-Select-

Total \$1,874.29

PO Date: 08/22/2024 | Expected Delivery Date: 08/22/2024 | Ship to: Custom Address | Status: Open

Location / J: WO-10098 | Email: Email

Custom Address

AA Service Off Site Warehouse
 1234 First Street
 Unit 175A
 Anytown, FL 12345

The address cannot exceed 4 lines

Cancel OK

Click the 'Custom Address' icon to enter the Address to which you want the PO Items Shipped

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

Custom ship to address will print on the PO

Purchase Order

Purchase Order Date: 08/22/2024
 Purchase Order Number: PO-1516
 Expected Delivery Date: 08/22/2024

Ship To : AA Service Off Site Warehouse
 1234 First Street
 Unit 175A
 Anytown, FL 12345

Vendor

Trane
 1541 Stonewall
 Lewisville, TX 750564809
 9725123234
 wmosborn@me.com

Information

Site Name: Tutone, Tommy
 Work Order #: WO-10098

Item	Description	Qty	Price (\$)	Amount (\$)
4TTR6036j	The XR16 home air conditioning system has a SEER rating of up to 17.00, making it an excellent choice for home comfort and for earning energy-efficiency tax credits. Increased efficiency may substantially lower your home cooling costs. Materials for all central air conditioning systems are tested again and again for long-lasting performance and durability.	1.00	1874.2900	1874.2900
Total				\$1874.29

Service Agreements – New filters added to the Service Agreement Listing screen

The 'Zip Code' was added to the default Service Agreement listing search box and the 'Zone' was added to the Advanced Filters. This will be beneficial when trying to review and schedule Missed Inspections.

Agreements (7) Filters Applied: 33901 Clear All

Mass Renewal Print Export

Search field can now search by Zip Code

33901

Number	Reference Id	Customer Name	Info	Plan	Problem Code	Est. Time	Maintenance Date	Notes	Actions
SA-710-01		Jackson, Dave		Gold 1 Monthly	Insp 1	0.00	08/01/2024	Notes	Schedule
SA-704		Tinsley, Nicole		Gold 1 Annual	Insp 1	0.00	03/01/2024	Notes ✓	Schedule
SA-686		Wilson, Jeff		Gold 1 Annual	Insp 1	0.00	08/01/2023	Notes	Schedule
SA-679		Smith, Dave		Gold 2 Monthly	Insp 2	0.00	10/01/2023	Notes	Schedule
SA-679		Smith, Dave		Gold 2 Monthly	Insp 2	0.00	05/01/2024	Notes	Schedule
SA-618		Dean, Gary		Commercial Preventative Maintenance Agreement	Com - Inspection	20.00	09/01/2022	Notes	Schedule
SA-116-03		Quiznos		Gold 1 Annual	Insp 1	0.00	09/29/2022	Notes	Schedule

15 Showing 1 - 7 of 7

Agreements (104) Filters Applied: North FM Clear All

Mass Renewal

Zone has been added to the Advanced Filters

SEARCH BY Clear All

Search

PLAN All

STATUS All

Zone North FM

TAGS

Show Expired Contracts that Renewed

Show Suppressed Contracts

Lock the Filter

GO

Number	Reference Id	Customer Name	Info	Plan	Problem Code	Est. Time	Maintenance Date	Notes
SA-397		Hall, Justin		Gold 1 Monthly	Insp 1	1.00	10/01/2022	Notes
SA-710-01		Jackson, Dave		Gold 1 Monthly	Insp 1	0.00	08/01/2024	Notes
SA-704		Tinsley, Nicole		Gold 1 Annual	Insp 1	0.00	03/01/2024	Notes
SA-686		Wilson, Jeff		Gold 1 Annual	Insp 1	0.00	08/01/2023	Notes
SA-680-01		Power Sports		Commercial Preventative Maintenance Agreement	Com - Clean & Check	0.00	06/01/2024	Notes
SA-124-04		Scott, Mike		Gold 1 Annual	Insp 1	0.00	05/12/2023	Notes
SA-124-05		Scott, Mike		Gold 1 Annual	Insp 1	0.00	05/12/2024	Notes
SA-124-04		Scott, Mike		Gold 1 Annual	Insp 1	0.00	10/12/2023	Notes
SA-457-02		Anderson, Bruce		Gold 2 Annual	Insp 2	0.00	11/01/2023	Notes
SA-457-02		Anderson, Bruce		Gold 2 Annual	Insp 2	0.00	06/01/2023	Notes
SA-457-03		Anderson, Bruce		Gold 2 Annual	Insp 2	0.00	06/01/2024	Notes
SA-781		Power Sports		Commercial Preventative Maintenance Agreement	Com - Inspection	0.00	07/30/2024	Notes
SA-115-04		Norberg, Chad		Gold 1 Annual	Insp 1	0.00	09/29/2023	Notes

SF Mobile – You can now select additional forms on a Work Order

In SF Mobile, you can now select additional Forms that might be pertinent to a Work Order, as opposed to only being able to use the default work order and/or equipment form. Prior to this release, you could only have one 'Work Order' form (the default form associated with the Problem Code) and one 'Equipment Form' (the default form associated with an Equipment Type). By default, the work order will only list forms associated with the Problem Code or the Equipment selected, but you can add additional forms to be filled out if applicable. This will be helpful when working for a particular customer that might have several specific forms that they need completed.

NOTE – Additional Work Orders will appear in the Attachments section of the Work Order timeline screen.

