



Enhancements

1. Sorting the Locations/Jobs tab. The Location/Jobs tab can now be viewed in a “flat” view that allows sorting of most displayed fields. (Enhancement #6051)
2. Sorting, filtering, and customizing the history/documents tab. The history/documents tab now allows sorting, filtering, and customizable columns per user. (Enhancement #6057)
3. New defaults for the “Post Work Orders” screen. Smart Service now allows companies to set defaults for the “Post Work Orders” screen, including date filters and QuickBooks options, in Setup. Users can also filter the “Post Work Orders” screen by job exception and have an option to select/unselect all records in one click for posting. (Enhancement #6103)
4. Updating recurring jobs with Smart Routes. Smart Routes users can now update recurring jobs for optimized routes, allowing users to change the scheduled time of not only the job being optimized but also all future occurrences of the job. (Enhancement #6073)
5. Asset Category View of Scheduler. Users are now able to view the scheduler by asset category, allowing all assets of the same type to be viewed at one time. (Enhancement #6065)
6. Added verification for iFleet service on startup. Smart Service will now automatically check the status of the iFleet service when starting Smart Service, or opening the “Mobile” screen. (Enhancement #6023)
7. Hide cost in iFleet. Added an option to hide costs of items in iFleet, separating it from price, quantity, and purchase order options. (Enhancement #5975)
8. Filtering contact search via job status. Added the ability to filter the contact search screen by job status, if the column has been added through column customization. (Enhancement #5973)
9. Added customer PO field. Added a new field for customer PO numbers. The field will be searchable and reportable through Smart Service, and will display on the customer copy of an estimate, or work order. (Enhancement #5893)
10. Improved the speed of opening a preview of standard work orders. (Enhancement #5886)
11. Posting negative quantities to update inventory counts in QuickBooks. Added the ability to post negative quantities on inventory items to QuickBooks for the purpose of receiving returned or unused inventory. (Enhancement #5688)
12. Added new searchable field for “Converted”. Added an available “Converted” column to searches for Prospects, Prospect Locations, and Prospect Jobs from the Contacts/Search screen. (Enhancement #5597)
13. Batch screen UI update. Updated the view of the “Batch Invoices” screen to show clear rows for each customer invoice. (Enhancement #4709)
14. Inactivate customer equipment. Equipment records can now be inactivated inside of the customer records. The equipment tab can now be filtered to include inactive equipment. Inactive equipment records will no longer be sent to iFleet. (Enhancement #3006)

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Resolved Issues

1. Smart Service will now truncate long strings when running “get customers”. QBO (Issue #5971)
2. Resolved issue for all “unhandled error” prompts. (Issue #6140)
3. Service items will now post to QuickBooks timesheets for estimate time entries. (Issue #6122)
4. History records will correctly show the assigned employee in the “Additional Info” tab. (Issue #6060)
5. Price breaks will no longer be available on location records if disabled in the “Setup” tab of Smart Service. (Issue #6052)
6. History reports will properly show the price level field. (Issue #6046)
7. Correspondence records will no longer allow a user to change the “Type” once the record has been saved/closed. (Issue #6040)
8. “Time By” reports will properly generate the time details when running them under a customer, or job record. (Issue #6038)
9. The smart pane will now properly display last service information from the scheduler. (Issue #6024)
10. Viewing time details will now show correctly on Hi-Res monitors in Smart Service. (Issue #6015)
11. Smart Routes will save previously selected options when switching to a new tab. (Issue #6014)
12. Job with an “Ends After” date will properly deactivate once the last date of the job is posted. (Issue #5995)
13. The time picker will properly adjust the date when using the “Now” button for date/time. (Issue #5992)
14. Emails and text messages sent through Outlook will properly create a correspondence record in the customer/job. (Issue #5982)
15. Vendors and sales reps will now appear in Smart Service as their full name, and abbreviation. (Issue #5961)
16. The Mobile Workforce tab will now save your position on the screen after a refresh. (Issue #5947)
17. The daily summary bar will calculate correctly for jobs with multiple blocks of time. (Issue # 5945)
18. Smart Service will now use the “Scheduled Date” if selected during batch invoicing. (Issue #5935)
19. Internal PO numbers will now longer be visible on the standard estimate form. (Issue #5931)
20. The “Post Work Orders” screen will now save previously selected setting if additional prompts are encountered. (Issue #5929)
21. History records with no job items will now show a job amount of \$0.00. (Issue #5928)
22. Smart Service will apply the proper format to report fields when selecting a time/date for timesheet reports. (Issue #5922)

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23. Smart Service will now allow Vendors with special characters to be selected on PO's. (Issue #5855)
24. Service agreement options will properly reflect the setup of Smart Service, and will be hidden if disabled. (Issue #5776)
25. Resolved an issue with the "Copy Data" utility. All Prospect/Prospect Locations/Prospect Jobs will now be available for the record update. (Issue #5772)
26. Smart Service will properly remove a "Sales Rep" from customer/job records, and will no longer reapply based on defaults. (Issue #5765)
27. Resolved an issue causing multiple time entries to appear as separate jobs when viewing "Jobs on Device" in the Mobile Workforce. (Issue #5746)
28. Added verification that all dates on a job are that the start time is earlier than the end time, and there are no times spanning midnight. (Issue #5737)
29. The summary sheet will now order all jobs based of scheduled dates/times if a custom order has not been selected. (Issue #5710)
30. History records will now allow the ability to use the mouse scroll wheel. (Issue #5675)
31. Added new database defaults when installing Smart Service for the first time. (Issue #5564)
32. The "Copy Data" utility will now properly update salutations to all record types. (Issue #5660)
33. Smart Routes will now route jobs to their current scheduled date unless otherwise specified. (Issue #5357)
34. The "Batch Invoices" screen will now save all previously selected settings, and posted invoices will reflect the options selected in the batch screen. (Issue #2130)
35. Service agreement notes now support the ability to line break. (Issue #5974)
36. Improved the speed of updating the "Job type/Description" field on a job. (Issue #5752)