



## Label / Terminology Changes

After some discussion about the verbiage used in certain areas of Smart Service, we have replaced ineffective/confusing labels with more accurate descriptions of the features they represent. None of the features have been modified, only the labels! You can see a full list of these label changes below. (Enhancement #8672)

### **“Do Not Post” Changed to “Do Not Invoice”**

The “Do Not Post” feature, which prevents Smart Service from creating an invoice in QuickBooks, has been changed to “Do Not Invoice” in Post Work Orders and in Defaults. (Enhancement #8674)

### **“Comments” Sections for Work Orders and Estimates Renamed to “Terms & Conditions”**

The sections previously labeled “Comments for top/bottom/left/right section of work order/estimate” have been changed to “Terms & Conditions” to more accurately represent what should be entered in these sections. These terms and conditions will continue to be displayed on your estimates/work orders. (Enhancement #8675 & 8677)

### **“Contacts Search” Changed to “Search”**

The “Contacts Search” section, where you search for customers, has been changed to “Search” which will be consistent on both the label for the tab and on the tab itself. (Enhancement #8678)

### **“Scheduling” Changed to “Scheduler”**

The main calendar of Smart Service has been renamed as the “Scheduler” to avoid confusion with the “Scheduling” tab available on job records. (Enhancement #8679)

### **Work Order Options in Settings**

Corrected an inconsistency where the options for paper work orders were sometimes singular and sometimes plural. (Enhancement #8680)

### **Report Types vs. Report Categories**

Replaced the report “Categories” label in the reporting screen with “Type” to match the option for report type when building reports. (Enhancement #8694)

### **“Realtime Location-Based Services” Changed to “Location-Based Services”**

This change was made in Mobile Workforce to more accurately represent the breadcrumb tracking feature available with iFleet. (Enhancement #8254)



## “Enable Job Notes to be Edited” Changed to “Overwrite office Notes” in iFleet Settings

We changed the wording of this setting to more accurately represent what this option allows. If checked, your iFleet users can modify/delete the job instructions entered by your office users. (Enhancement #8728)

## Changes for Overnight Work

As on version 113, timestamps (with the exception of additional times) will be able to span midnight. When a timestamp spanning midnight is detected by Smart Service, the timestamp will be split automatically. For example, a timestamp from 11:00 PM on March 3<sup>rd</sup> to 1:00 AM on March 4<sup>th</sup> will be split into two timestamps, a March 3<sup>rd</sup> from 11:00 PM to 11:59 PM and another timestamp on March 4<sup>th</sup> from 12:00 AM to 1:00 AM. (Enhancement #8498)

## Other Enhancements

1. Added a warning prompt for QuickBooks Pro and Premier users when QuickBooks is approaching the names list limit. (Issue #8807)
2. The “Correspondence” tab on jobs now contains a copy of the signed work order and forms from iFleet. (Enhancement #8432)
3. The copy data utility can now transfer information from customer to prospect and vice-versa. (Enhancement #8555)
4. The “Sync Names” function now asks if inactive records should be checked, or only active records. (Enhancement #8825)
5. The “Company Name” field has been added to the column option in Search. (Enhancement #6391)
6. Changes made to the waiting list (sorting, filtering, and column widths) are now preserved for the user once adjusted. (Enhancement #7491)
7. The Serviced Equipment tab can be searched by serial number and also now displays the serial number for equipment records. (Enhancement #7707 & #8833)
8. The “Completed Date” field can now be populated onto custom CST’s for Smart Service. (Enhancement #8141)
9. Service agreement invoices sent to QuickBooks Online can now use the Smart Service generated invoice number format if that option is selected in settings. (Enhancement #8560)
10. A new field, “QuickBooks Transaction Created” has been added to history reports. This field will track whether or not an invoice was made in QuickBooks when the job was posted in Smart Service/ (Enhancement #8655)
11. Modified “Sales Tax Code” and “Purchase Tax Code” in settings for Canadian users. Both fields will have the same tax code list available and should apply when creating a new customer. (Enhancement #8661)
12. Added a time picker for jobs in the scheduling tab. This time picker can also pick from times outside of the scheduler times chosen in settings. (Enhancement #8806)
13. Marking an equipment record as serviced will now update the last/next service date on that equipment record. (Enhancement #8848)
14. Customers using the “Do Not Send Jobs to QuickBooks” setting can now void and refund payments in Smart Service. (Enhancement #8852)
15. A confirmation prompt has been added when voiding payments. (Enhancement #8873)



16. The “Email” button when previewing statements will now contain the payment URL when emailing the statement to the customer. (Enhancement #8913)
17. A “Select All” and “Clear All” button has been added to the statements screen, allowing users to choose to select or deselect all customers/jobs when making statements. (Enhancement #8931)
18. Sending the invoice from a history record will now check for any unposted payments. (Enhancement #8937)
19. Added a notification to alert the user when there are insufficient funds to send a text message from Smart Service. (Enhancement #8940)
20. Smart Service and iFleet will now show both the job total and the customer total on work orders/invoices when “Include Customer Total” is checked. (Enhancement #8668)

## Resolved Issues

1. Resolved an issue where coordinates used in Smart Routes, which were located on a different continent than the starting address, or were otherwise impossible to route to, weren't being displayed as an issue. (Issue #6523)
2. Corrected an issue where opening a purchase order with a subtotal item would result in an error message. (Issue #7267)
3. Fixed an issue where history records would not be shown on history reports if the job had been deleted from Smart Service. (Issue #7614)
4. When entering longitude/latitude in Smart Service, the system will prompt the user to correct the longitude if the coordinate supplied is greater than zero. (Issue #7825)
5. Resolved an issue where the “Get Lists” prompt upon startup would not close when the “Get Lists” was completed. (Issue #7836)
6. Corrected an issue where an additional employee on a job was generating a duplicate invoice to be sent to the customer when using the “Send Invoice” option in Smart Service. (Issue #8431)
7. Fixed an issue where emails sent using Outlook would have their formatting stripped. (Issue #8436)
8. Resolved an issue where viewing a payment receipt in Smart Service would cause an “Invalid Procedure Call or Argument” error. (Issue #8665)
9. Correct an issue where sales receipts could not be imported when running a history import from QuickBooks. (Issue #8726)
10. Fixed an issue where deleting an inventory location in the inventory module would result in error. (Issue #8732)
11. Resolved an issue where checking “Post All” in Post Work Orders would cause the “Custom” date filter to function incorrectly. (Issue #8746)
12. Fixed an issue where inactivating a customer which had jobs that were active when deleted would prompt the user when inactivating the customer. (Issue #8752)
13. Corrected an issue where the “Go to Record” button on reminders and phone calls would produce an error. (Issue #8761)
14. Removed an additional space in the job name when using the default naming convention. (Issue #8763)
15. Created a prompt to alert the user after the 15 minutes if the backup function has timed out in SQL. (Issue #8773)
16. Resolved an issue where trying to create a customer would open a prospect record instead. (Issue #8789)
17. Fixed an issue where inactivating a customer in Smart Service would not inactivate that customer in QuickBooks Online. (Issue #8790)



18. Corrected an issue where entering latitude and longitude would result in a program crash randomly. (Issue #8809)
19. Fixed an issue where the prompt that appears when inactivating a record would not disappear once the record was successfully inactivated. (Issue #8827)
20. Resolved an issue where the “Message All” button in text message job reminders would not trigger the reminders to be sent. (Issue #8858)
21. Fixed an issue where payments on recurring jobs were being created for future recurrences of the job. (Issue #8863)
22. Corrected some inconsistencies with permissions where having “Customers & Locations” set to “Read Only” would allow the user to edit some fields. (Issue #8868)
23. Resolved an issue where recurring payments were being posted without being processed. (Issue #8870)
24. Fixed an issue where having the invoice date defaulted to “Custom” would hide the date picker when opening ‘Post Work Orders’. (Issue #8871)
25. Corrected an issue where the ‘Add Time Charges’ function would not record the last time charge as an item when selected. (Issue #8872)
26. Resolved an issue where ACH payments did not include the customer’s name and billing address if stored as a saved payment method. (Issue #8881)
27. Fixed an issue where notes added to service agreements were appearing on the customer-facing service agreement statement. (Issue #8885)
28. Corrected an issue where the customer’s billing address was not being suggested as the credit card’s billing address. (Issue #8893)
29. Resolved an issue where creating statements “per job” would create multiple, duplicate “Pay Now” buttons. (Issue #8930)
30. Fixed an issue where filtering job types with an apostrophe in Post Work Orders would result in an error. (Issue #8959)
31. Corrected an issue where “add asset” would not work if one of the assets was missing a QuickBooks item. (Issue #8976)