



Enhancements

1. View estimates shortcut added to customer records. All customer records that have an associated prospect now have a button in the Locations/Jobs tab to open the Locations/Estimates of that prospect. (Enhancement #5304)
2. Email address in contact search. The Contact Search screen now searches by the customer's email address. (Enhancement #5283)
3. Map view of a technician's schedule. Users can view a map and directions for a technician's route for the day by clicking the user's summary bar and then clicking the "Mapping" button on the Smart Pane. (Enhancement #5282)
4. Add a Custom Work Order to iFleet Devices. Smart Service has the capacity to not only disable the Standard Work Order form included with iFleet, but replace it with one or more of your choosing. This option can be enabled within the setup tab and the custom work order preferences can be set on the device itself. (Enhancement #5313)
5. Address certification indicator reflects on sub records. If you have certified a customer or location's address, the certification indicator will be transferred to any job created from that customer or location. (Enhancement #5115)
6. History record includes the user that posted the job. History records, and history reports, include a new "Posted By" field, which will display the date and user responsible for posting the job to QuickBooks. (Enhancement 5334)
7. Edit the email address in iFleet. A new permission has been added to allow iFleet users to edit the email address assigned to the job. This change will be transferred back to Smart Service and update the job accordingly. This permission is set per user. (Enhancement #5273)
8. Add to customer notes from iFleet. If given the appropriate permission in Smart Service, iFleet users will have the ability to add to the customer notes field from iFleet devices. This permission is set per user. (Enhancement #5276)
9. Smart Service News Page. Smart Service news will now launch upon startup to bring you Smart Service announcements and articles relevant to your business. (Enhancement #5303)
10. Enhance Service Agreement Mail Merge. The mail merge now includes the customer's email, service and billing addresses, and equipment information as available merge fields. (Issue #5249)
11. Confirmation on delete. A confirmation is now required to delete correspondence and equipment records. (Enhancement #5211)
12. Copy Data. The Copy Data utility now includes the "Map Code" field. (Enhancement #5305)

Resolved Issues

1. Resolved an issue where contacts search would not display customers in alphabetical order. (Issue #5353)
2. Resolved an issue causing additional load times when previewing a work order. (Issue #5330)

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3. Corrected an issue where adding scheduling information to an inactive job would not properly activate the job. (Issue #5216)
4. Fixed an issue where customer names exceeding 41 characters would crash a Custom Word Order. (Issue #5201)
5. Updated the naming convention for prospect jobs on the home screen. (Issue #5122)
6. Resolved an issue where the “email work order / estimate” option would not populate with the customer’s address. (Issue #5094)
7. Corrected an issue where deleting a job from Smart Service would also remove the history record from the calendar. (Issue #5093)
8. The “What’s New” page has been redirected to the Smart Service website. (Issue #5086)
9. Added zoom feature to all user defined fields. (Issue #5073)
10. Added a confirmation prompt when removing jobs from the waiting list. (Issue #5035)
11. Fixed an issue where opening the purchase order window would close Enter Completed Work Orders. (Issue #4980)
12. Resolved an issue where the Smart Pane would not display history jobs properly, if the job had several line items. (Issue #4424)
13. Resolved an issue where emailing a job reminder for the active scheduled date would show as “emailed” for recurring dates. (Issue #3713)
14. Corrected an issue where group items would not properly calculate tax when quantities are changed within the group. (Issue #5224)
15. Fixed an issue where the user could delete the profile they were currently logged in as. (Issue #5204)
16. Resolved an issue where clicking Smart Find without Smart Routes or MapPoint would cause an app crash. (Issue #5217)
17. Resolved an issue where a user with insufficient permissions in QuickBooks could clear out list data inadvertently in Smart Service. (Issue #2735)
18. Corrected an issue that allowed a user to save a job without having set the tax rate for line items in Canadian QuickBooks Online. (Issue #5048)
19. Fixed an issue where tax rates would not carry over to the job from PO’s in Canadian QuickBooks Online. (Issue #5055 & 51815)

20. Corrected an issue that prevented some users from not being able to update their Smart Service Password or create a new login ID. (Issue #5369)
21. Corrected an issue where removing a price level from a Service Agreement would cause an error prompt. (Issue #5397)

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22. Fixed an issue where taxes would not be calculated properly on purchase orders for QuickBooks Online Canada. (Issue #5055)