Batch Invoice Screen Redesign

Complete overhaul of the “Batch Invoices to QuickBooks” screen from the office tab. The new batch invoicing screen offers several features for organization of ongoing batch jobs and quicker access to completed services contained within the batch job. (Enhancements #2087, #5390, and #6059)

Improved Tracking and Management

Job type and recurrence pattern filters have been added to display specific types of services for review and posting. Users will also receive the option to search for the “Last Job Date”, which is the most recent service date completed for that batch service. A “Search For” textbox has also been added for those searching for a specific customer or job. All batch records are now displayed in alphabetical order by customer name.

History Record Details

Clicking the underline record name will display a dialogue detailing each service date contained within the batch, the total from that visit, and the items from that service date. Users can review the items contained within each visit by expanding the “+” button next to each service date.

Post Multiple Batch Jobs at Once

A new option to select a series of batch invoices to be posted at once has been added. This option allows the user to select and post multiple batch invoices to QuickBooks at once. Once the option is clicked, the user is directed to select which items to post using the checkboxes to the left of each item. Clicking “Post All” a second time will post all items to QuickBooks.

Text Messaging via Smart Service

This latest version of Smart Service offers a text messaging capability. Smart Service will purchase a phone number from your local area which integrated via Twilio with your Smart Service database. This provides the ability to send and receive text messages (SMS only) directly within Smart Service.

This new feature complies with the CAN-SPAM Act which requires Smart Service users to opt customers into the text messaging service. Once a customer has opted into receiving messages, the “Copy Data” tool can be used to add the customer’s SMS number to their existing services.

You can read a full list of the expected functionality by visiting our new text messaging page on the knowledgebase here.

Text Job Reminders

Once subscribed, Smart Service allows users to create template messages and send automated reminders to customers with upcoming services. This window will be made available under “Job Preparation” in the office section. Which operates similar to the “Email Job Reminders” screen.

Texting Customers

The text messaging feature within customer records for messaging employees has received a new option for texting the customer. Upon clicking this option, users will be asked if they would like to text an employee or a customer. Choosing the "Text Customer" option will take users to the text messaging center using the number specified for the customer.

Text Messaging Center

"My Messages" has been added to the office section which allows users send and receive messages, and to see unread text messages and those assigned to the user themselves. A full tutorial of these functions is available at the Knowledge Base.

Customer Notifications (iFleet Users)

The "Customer Notification" feature has moved from the iFleet application to a central location under the iFleet tab in Smart Service's settings window. This feature has been upgraded from email notifications to text notifications which is now controlled by the office users. Users can create a template notification that will be dispatched via text when the iFleet user adds the "Start Travel" timestamp. (Enhancement #6601)

Other Enhancements

1. Added compatibility with QuickBooks Desktop Advanced Inventory to accept Bins / Locations within sites. (Enhancement #6625, 6645, 66416419)
2. Ability to limit a Smart Service user to only their schedule on the calendar via a new permission on user profiles. (Enhancement #6661)
3. Added a "Signed By" field to the History/Docs tab. (Enhancement #6646)

Resolved Issues

1. Corrected an issue where customer records would not display an accurate job count when locations were involved. (Issue #6594)
2. Resolved an issue where the Add/Edit payment function would round off dollar amounts entered. (Issue #6597)
3. Fixed the order in which items are displayed in the "Copy Data" utility. (Issue #6419)
4. Corrected an issue where Canadian versions would not correctly calculate taxes. (Issue #6380)
5. Resolved an issue where users would not use the group item search feature. (Issue #6671)
6. Fixed an issue where item costs would display in the item dropdown when costs were disabled. (Issue #6662)