



Waiting List Customization

With the release of Smart Service version 105, the waiting list has received some major updates and convenient features. Once you've updated to this version, you will have a colored bar at the bottom of the screen labeled "View Waiting List". Our new features include:

1. Separate tabs for work orders vs. estimates.
2. Ability to customize columns via the column customizer on the right.*
3. A new "Added to Waiting List" field, which displays the date this items was added to the waiting list.

*The column customization is a user specific feature, which includes the standard fields and job user-definable fields added to your Smart Service database. (Enhancement #154)

Send Estimates to QuickBooks

Smart Service has received the capability to create an estimate in QuickBooks, which mirrors your Smart Service estimate. This process takes place when converting an estimate to a job in Smart Service, and your preferences for this feature can be set in Smart Service's settings under the "Estimates" tab.

This is a fantastic feature for those who desire the ability to perform estimate from the field, but also require job costing or progress invoicing in QuickBooks. (Enhancement #4956)

Online Payment Portal (CardConnect Users)

CardPointe users have the ability to collect payments using an HPP (hosted payment page). Users requesting this feature can sign up for this fantastic new option by calling or emailing our support team. Hosted payment by CardPointe from CardConnect allows your customers to make electronic payments online directly from the invoice you send with Smart Service. In short, users will be able to use the following features:

1. Payments page is customizable
2. Customers can pay from the convenience of their home or workplace
3. Payments made come directly to Smart Service for processing

This feature requires CardPointe Integration, if you would like more information about CardPointe, please visit us at [this website](#) or send us and email at merchantinfo@myservicedepot.com with your contact information to get started today! (Enhancement #6919)

Post Payments Screen

A new "Post Payments" screen has been added to the Office to provide users with a convenient way to take advantage of their CardPointe Merchant Service. Other payments can also be processed through this window. (Enhancement #6985)

1. Payments not yet posted to QuickBooks will be displayed in the screen, regardless of whether or not the invoice has been sent to QuickBooks yet.
2. Users will also have the ability to accept payments for batch invoice jobs.



Other Enhancements

1. Added a “Batch Invoicing for Customer” option, which will place the QuickBooks invoice under the customer, regardless of whether or not a location exists between the job and customer record. This will combine other “Batch to Customer” jobs into one invoice if more than one “Batch to Customer” jobs exist for a given customer. (Enhancement #5887)
2. Post Work Orders now has an option to select / deselect all options in the list. (Enhancement #6541)
3. Users have the ability to filter by “Job Type” in Post Work Orders. (Enhancement #6622)
4. QuickBooks Online users have the ability to use item bundles in Smart Service. (Enhancement #6108)
5. Added a “Creation Date” field in contacts search. (Enhancement #5014)
6. History records for QuickBooks Online customers will now display a subtotal. (Enhancement #6955)
7. Added the ability to filter out jobs missing emails in ‘Email Job Reminders’. (Enhancement #7041)
8. Created an option to select/deselect *all* one-time or active boxes for line items at once. (Enhancement #7055)
9. Added new options for batch invoice items descriptions. (Enhancement #7187 & 7189)

Resolved Issues

1. Customer’s preferred “Send Method” now syncs to QuickBooks. (Issue #6086)
2. Resolved an issue where item descriptions customized in Smart Service would revert to the default description upon posting. (Issue #6561)
3. Fixed an issue where inactive items would cause Work Orders to be blank in Smart Service. (Issue #6618)
4. Resolved an issue where creating new customers from Contact Search via the ribbon would result in a (424) error. (Issue #6790)
5. Corrected an issue where customers would receive an ODBC error when creating new Service Agreements in Smart Service’s Service Agreement Module. (Issue #6813)
6. Converted audit reporting fields to date/time format for easier use. (Issue #6833)
7. Made “Method” a required field when processing payments. (Issue #6844)
8. Resolved an issue where audit log reports could not filter to one specific date at a time. (Issue #6878)
9. Corrected an issue where QuickBooks Online customers would see address lines doubled on invoices. (Issue #6346)
10. Added reporting fields for QuickBooks Desktop Inventory bins and sites. (Issue #6959)
11. Fixed an issue where job exceptions with apostrophes could not be saved. (Issue #7006)
12. Added a feature to prompt users when selected payment amount does not match the job’s total. (Issue #7013)
13. Corrected a misspelling on the scheduler. (Issue #6964)
14. Fixed cycle order when tabbing through ‘Send Email’ function. (Issue #7022)
15. Corrected an issue causing a timeout when running a get customers. (Issue #7199)