Equipment Overhaul

Added multiple enhancements for the creation, organization, and usage of equipment records for the office and field, these items include the following features for this enhancement:

UDF Formatting

The ability to format user definable fields (UDF's) has been added in the settings screen. This option will allow you to format UDF's to force users to enter items into the fields in the correct format. UDF's can be formatted for text values, drop-downs, dates, and dollar amounts. (Enhancement #7391)

Types & Groups

Users can add "Types" on equipment records if their company services different kinds of equipment. The ability to group equipment has also been added. We recommend watching our video at www.smartservice.com/updates for examples and more information on using this feature. (Enhancement #7236)

Sorting & Grouping Functionality

New options to manage equipment have been added to Smart Service and iFleet. These features can be accessed via iFleet to allow users to sort by "Name", "Group", "Type", and "Model" while grouping options have been added for "Type", "Group", and "Model". (Enhancement #7236)

Asset Revision

Assets have also been updated to include better tracking and management of your company's property. The asset features have migrated to the "Maintenance" section of the office screen and include the following updates as part of enhancement #7244:

- Under the new Asset Management section you can create/modify assets, enter usage details like hours and miles when needed, and see assets that have been flagged as needing maintenance from the field.

- The "Limit asset to one job" default option now removes the asset from the job it has been used on, leaving asset usage details in the "History Asset Usage" report type.

- For current details on what assets are in use on jobs, users can create an "Asset Usage" report in the reporting section.

- iFleet users have the ability to log hours for assets and flag assets for maintenance from iFleet. When an asset is marked for maintenance, a number will appear on the "Asset Management" option in the office screen.

Rounding for Billable Items

An option has been added to automatically apply a minimum charge for the "Add Time Charges" feature, as well as the ability to round to the nearest hour, half hour, or quarter hour. This option can be configured in the settings window under the "Company" tab using the "Set up Rounding for Billable Items button. These options will affect all time charges added for any employee. (Enhancement #7260)

Other Enhancements

1. Created email templates for sending work orders and estimates via email to the customer. These templates can be customized in the iFleet tab of settings and will be used by all devices. (Enhancement #2648)
2. Added the ability to report on job exceptions from job reports. (Enhancement #6519)
3. Certified addresses will carry certification mark when converting to a prospect record. (Enhancement #7137)
4. Added the ability to select a date range of history records for batch posting. (Enhancement #7381)
5. Added integration for "Customer Type" with QuickBooks Online. (Enhancement #6944)
6. Added the ability to send estimates to QuickBooks Online when converting an estimate to a work order in Smart Service. (Enhancement #7035)
7. Added option for setting up rounding for billable time charge items in Settings > Company. (Issue #7260)

Resolved Issues

1. Resolved an issue where sales tax groups were rounding improperly resulting in totals being off by $.01. (Issue #6852)
2. Improved handling of Automated Sales Tax for QuickBooks Online users. (Issue #6958)
3. Resolved an issue with saving purchase orders resulting in "(91) Object variable or with block variable not set error". (Issue #6960)
4. Resolved an issue with daily recurring jobs set to long spanning recurrence patterns inactivating prematurely. (Issue #7050)
5. Resolved an issue with tax calculation and payment line items in Smart Service for Canadian QuickBooks Desktop that resulted in a 3180 QuickBooks error during posting and tax calculations being off by $.01. (Issue #7161)
6. Resolved an issue with Google Calendar Integration and the "Start/End Time" field from QuickBooks when Customer:Jobs that were created in QuickBooks are pulled into Smart Service and scheduled. (Issue #7230)
7. Improved handling of 4K monitor resolutions when using Smart Routes which resulted in "(6) Overflow Error". (Issue #7257)
8. Resolved an issue with payment details being modified after a failed transaction and the modified payment record not being referenced upon posting. (Issue #7383)