



## Major Feature Update for Smart Service and iFleet

In Version 108 for Smart Service and iFleet, we have added the ability to add customers, locations, and jobs from the field using the iFleet application. This new functionality required changes to Smart Service, iFleet, as well as the intermediary iFleet NT Service, which allows the two programs to communicate. This means that when you are updating to version 108, it is important to update each workstation and each iFleet device.

*The first portion of these Release Notes can be found on the iFleet Release Notes as well, to increase awareness of the new functionality. Program specific enhancement and resolved issues follows the major feature change section.*

### Smart Service Application Changes

#### *Changes to Employee Permissions*

In the Smart Service application, users are able to assign individual iFleet users or all iFleet users the permission to use this feature by editing the user in Smart Service Settings > Employees, under the “iFleet Permissions” section of each profile; simply check the box next to “Customers, Locations, and Jobs”. When the iFleet user has this option activated, upon their next sync in iFleet, they will be presented with a “+ New Job” option in the iFleet Menu.

#### *Interaction with the Default Auto-Naming Functionality*

When the iFleet user attempts to add a new job from iFleet, it will use the Default Setting for Auto-Naming, which removes the option for the iFleet user to name the job manually.

- If your setting is set to “Customer Name – Date”, it will use the current date in the name.
- If your setting is set to “Customer Name – Job Number”, “Job Number – Customer name”, or “Job Number”, iFleet will use the “Next Number” found in Auto-Naming.
- If you would like to be able to manually name job records, you can remove the selection from the dropdown by backspacing, leaving the field blank. This will present the iFleet user with a “Job Name” field to fill out. *If you choose this option, it is important to note that you will be required to come up with a name for each job as you create them from the office when prompted during office job creation, as well.*

#### *New Option in Office: Review & Post Section*

To support the functionality in iFleet, we have added a new option to the Office area of Smart Service under Review & Post, “Jobs to be added to QuickBooks”. In this section, the office will be able to review and approve entries from the field. This means that the creation of records from iFleet does not immediately impact your QuickBooks, allowing time to assess the information that was gathered for accuracy and assist with avoiding duplication of records.

Along with the basic filters that are found in other sections of Smart Service, users will be able to re-parent records that belong under different customers or customer: locations, open each record to verify accuracy, and finally add the job record to QuickBooks, allowing you to invoice.

This process will also allow the user add the new customers or customer: location records to QuickBooks as well.



## *At the Customer, Location, or Job Record*

In the Customer, Location, and Job record at the office for records added from iFleet, the Smart Service user will be able to adjust the “Customer/Location/Job Name” field until the record has been added to QuickBooks. At the point of adding to QuickBooks, the field will switch to a locked field, as is standard with this field.

Smart Service users will also have the ability to send the record to QuickBooks via the “Add Customer/Location/Job to QuickBooks” found at the bottom of the record.

*It is important to note that these functionalities are only available prior to adding to QuickBooks.*

## **iFleet Application Changes**

### *New Option in iFleet Menu*

Once the iFleet user has the proper permissions, they will be presented with the option, “New Job”.

### *How to Add New Records and Utilize Them*

Upon selecting “New Job”, the customer list available in Smart Service will be visible, including location records. The iFleet user can search using the search bar at the top, which is highly recommended to avoid duplication.

If the customer or customer: location does not exist in the list, they will be able to create use the “New Customer” button to add them to the list.

To add a job, the iFleet user will simply tap the “+” button next to the customer or location in the list to begin the process. In the new job, the iFleet user will enter basic details such as, Job Type, the date the job will happen, the start and end time, taxability, billing and service addresses, and contact information.

Once the job is submitted by the iFleet user, it will be processed by the intermediary iFleet NT Service, which will be returned to the device upon the user using the “Sync” button.



## Major Enhancements

1. Added Smart Service level functionality for iFleet Job Creation. (Issue #7768)

## Minor Enhancements

1. You can now add job exceptions as a displayable field within the Smart Service Scheduler. (Issue #4405)
2. Added the ability for alerts to go to iFleet jobs. (Issue #7668)
3. Added iFleet notes field in “Prospect Job” and “Customer Job” records; these notes are private. (Issue #7676)
4. Added ability to review Routzy queue errors from Smart Service. (Issue #7730)
5. Added ability to do percentage based surcharges in Smart Service. This enhancement only affects QuickBooks Online Users. (Issue #7795)

## Resolved Issues

1. Resolved an issue where previewing an estimate would show the last estimate viewed instead of the current one. (Issue #7617)
2. Resolved an issue in which an iFleet technician does not end travel time (Arrive at Job status) before starting the job (Job Begin), it would not update the color on the Smart Service scheduler appropriately. (Issue #7641)