



Prevent Jobs from Going to QuickBooks

An option has been added to Settings>Defaults that will prevent job records from being created in QuickBooks. This change is database wide and exceptions cannot be made for a single job record created from the point of activation. The full scope of this change will be broken down in the following sections as this option is both valuable and potentially hazardous.

This setting is a great option for those looking to save space in QuickBooks Pro or Premier or those looking to prevent some clutter in the QuickBooks customer list. This option should be discussed with your accounting team as it will disable certain functions in Smart Service and likely prevent your business from job costing accurately in QuickBooks.

When this setting is enabled, your Smart Service 'Location' records will still be sent to QuickBooks as job records and will continue to behave as normal.

UI and Functionality Changes

Before activating this setting, you will be advised to change your invoicing style if it is set to either "Immediate invoicing for job" or "batch invoicing for job". These options will be removed from the list once the setting is enabled.

With this option enabled, QuickBooks specific functions such as the 'QB Reports' button, 'Customer Balance' (only on the job level) button, 'Get Estimates' button, and the 'Purchase Order' button will also be disabled as these features require the record to exist in QuickBooks.

For customers using the inventory module, enabling this feature will also prevent these job records from showing up when creating or receiving purchase orders.

Lastly, job record names can be edited from Smart Service without a change being made in QuickBooks. Customer and Location records will continue to have name changes made in QuickBooks and 'Sync Names' clicked to update changes to their names.

Invoicing and Payment Changes

Once this setting is enabled, invoices and payments will be linked to the parent record as instructed by your invoice style than the job record in QuickBooks.

Timesheet Changes

The 'Post Timesheets' screen and functionality will be preserved when jobs are prevented from being sent to QuickBooks, however times posted to the employee timesheet will be tied to the Customer/Location parent record rather than the job level.



Other Enhancements

1. Added the ability to calculate employee times into HH:MM format in the reporting section for timesheet reports. (Enhancement #5221)
2. Created an option to duplicate timestamps in the post timesheets screen. This option can be accessed by opening a timestamp record via the edit button. (Enhancement#8056)
3. Created an option to receive a purchase order without creating a bill in QuickBooks Desktop. (Enhancement #8068)
4. Added the column customization feature to the Locations/Jobs tab. (Enhancement #5411)
5. Created additional options for the default job duration in settings. (Enhancement #5337)
6. Added an option for emailing work orders from the office for the user to choose whether they want to email to the customer or to the employee. This option requires the employee to have an email address on file and for Outlook to be integrated with Smart Service. (Enhancement #7959)
7. Combined the 'email from' fields for email job reminders for convenience. (Enhancement #7960)
8. Added merge fields for text messaging shortcuts. These can be added by right clicking when designing your text message shortcuts in settings. (Enhancement #8009)

Resolved Issues

1. Resolved an issue where two stops could not be at the same location in Smart Routes. (Issue #6366)
2. Fixed an issue where the "Last Month" date filter in post work orders would not display the selected date range correctly. (Issue #7010)
3. Resolved an issue where the scheduler's scroll bar wouldn't properly display for the department and asset views. (Issue #7628)
4. Fixed an "Invalid use of Null" error when saving a PO for QBO Canadian users. (Issue #7844)
5. Corrected an issue where options added for UDF drop downs could not be deleted. (Issue #7847)
6. Resolved an issue where QBO combined tax rates produced the incorrect tax amount. (Issue #7861)
7. Fixed an issue where users received a macro error when sending the calendar to Outlook. (Issue #7919)
8. Corrected an issue for US QBO users where 'Get Lists' would not pull all taxes. (Issue #7964)
9. Resolved an issue resulting in a (91) error when sending a text message from a customer record. (Issue #7965)
10. Corrected an issue when filtering marketing campaign data resulting in a syntax error. (Issue #7991)
11. Enabled the 'Customer Type' field for all new QBO databases. US "Plus" and "Advanced" QBO subscriptions will continue to sync this field with QBO. (Issue #8002)
12. Fixed an issue where maximizing the waiting list would cause a 2455 error. (Issue #8055)
13. Resolved an issue where Location UDF's would produce an error if drop downs were disabled. (Issue #8059)
14. Corrected an issue causing an enlarged version of the arrows in MWF to be displayed. (Issue #8108)