Service Email Addresses

A "Service Email" field has been added to all customer, location, and job records. This field should be used to store the email address preferred by the customer for their work order and other service-related documents and notifications. The existing email field will be utilized for billing related inquiries only. This service email address field does not transfer to QuickBooks. Upon updating to version 111, the primary email for a given customer will be copied to this new field. (Enhancement #4959)

Create Statements

Customers who have QuickBooks Desktop now have the ability to send a statement to customers via the new "Statements" option in the office screen. This new option will only be accessible by those with the new "Allow Statements" permission on their user profile. A new email template for statements has also been added to settings. (Enhancement #7658)

Other Enhancements

1. Smart Routes now supports the ability to have an employee start at one location for the route and end that same route at another location. This can be enabled from their employee profile. (Enhancement #8265)
2. Added a field for latitude/longitude for use with Smart Routes as the start/end point of the route. (Enhancement #8501)
3. Enabled the audit log for equipment fields. (Enhancement #3914)
4. Job User-Defined Fields (JUDF's) that are required will now be displayed as yellow to match other required fields. (Enhancement #4257)
5. Added an option to choose whether or not jobs attached to a service agreement are set to pending upon service agreement expiration. (Issue #8430)
6. Added User-Defined Field type "URL". (Enhancement #8503)
7. Modified job instructions can now be resent to Google Calendar. (Enhancement #8457)

Resolved Issues

1. Added additional information to prompt when receiving "QuickBooks is not running" prompt upon login. (Issue #8539)
2. Resolved an issue with the formatting of company phone number and fax number in settings. (Issue #6623)
3. Corrected an issue where Smart Service invoice numbers weren't being used for service agreement invoices sent to QuickBooks. (Issue #7997)
4. Fixed terminology on 'add prospect location' popup. (Issue #8215)
5. Added column customizer to the 'Locations/Jobs' tab when for customers who do not use locations. (Issue #8216)
6. Resolved an issue where jobs on the waiting list that were switched to locations would not automatically be removed from the waiting list. (Issue #8218)
7. Enabled 'Update Balances' for jobs that are inactive in QuickBooks. (Issue #8266)
8. Fixed an issue where the copy data tool would display estimates as jobs instead. (Issue #8346)
9. Resolved an issue where the 'Send Invoice' option would not appear when the user has chosen not to send job records to QuickBooks. (Issue #8417)

10. Corrected an issue where 'Send Invoice' was appearing on jobs set to batch. (Issue #8419)
11. Resolved an issue where checkbox options (such as call aheads) would not be sized properly when added to the 'locations/jobs' screen. (Issue #8423)
12. Fixed an issue where adding a last name to a customer with no first, last, or contact name would produce an 'Invalid Use of Null' error. (Issue #8440)
13. Corrected an issue for users of QuickBooks Advanced Inventory where 'Unspecified Site' could go into a negative quantity for items. (Issue #8452)
14. Resolved an issue where items with an apostrophe in the name would cause an error in the item search menu. (Issue #8471)
15. Fixed an issue where lengthy login ID's (50+ characters) would cause their name on the schedule to display as blank instead. (Issue #8040)
16. Corrected an issue resulting in an error when opening the scheduling want while the scheduler is already open. (Issue #8484)
17. Resolved an issue where credit cards with an expiration date beyond 2030 could not be processed. (Issue #8487)
18. Corrected an issue where open reports in QuickBooks would prevent Smart Service from generating a history record when posting an invoice. (Issue #8488)
19. Fixed an issue where the "show balances" option was causing an error when trying to send the customer a copy of their estimate. (Issue #8489)
20. Resolved an issue resulting in error when receiving a PO through the Smart Service inventory module. (Issue #8499)
21. Corrected an issue where hitting 'Tab' on a keyboard would cycle through the equipment fields in a different order than what's displayed in the program. (Issue #8505)
22. Fixed an issue where using the 'Custom Range' filter option in 'Post Work Orders' would present an error upon posting. (Issue #6388)
23. Resolved an issue where posting an invoice with the 'post times to timesheet' option was enabled would cause an error if the user does not have time tracking permissions in QuickBooks. (Issue #6446)
24. Corrected an issue where invoices posted from the service agreement module would not select the appropriate payment terms. (Issue #7904)
25. Fixed an issue where bills sent to QuickBooks Online would not link to purchase orders properly. (Issue #8120)
26. Resolved an issue where purchase orders for Canadian QuickBooks Desktop would not apply taxes correctly. (Issue #8354)