Automated Email and Text Reminders

New options to automate sending email and text job reminders to your customers has been added. A guide to using these features can be found here on our Knowledge Base. By checking the "Auto Send" checkbox and specifying the number of days before the service the reminder should be sent, Smart Service will use your SMTP information to automatically dispatch reminders to your customers for jobs with a matching job type.

If successfully sent to the customer, Smart Service will check the appropriate checkbox for the job reminder screen when sent. You can see the date and time the reminder will be sent for the customer in the job reminder screens as well.

Consideration has been given to the mass sending of text messages to avoid being marked as spam. Text reminders will be sent sequentially to avoid rejection by the cellular carriers. (Enhancement #8639, 8637, and 8701)

Estimates Center

The office screen now includes a new "Estimates Center" option where you can manage and convert prospects, prospect locations, and prospect jobs. From here, you can view all estimates and filter by status, creation date, scheduled date, sales rep, and more.

This screen was added to assist with the management and follow-up of estimates created by the office or in the field, allowing you easier access without the need to create a report. (Enhancement #8716)

Other Enhancements

1. Added permissions to allow iFleet users to add prospects, prospect locations, and prospect jobs from iFleet. (Enhancement #8625)
2. Added "Conversion Date/Time" field for prospect reporting. (Enhancement #8696)
3. Added the "Unit Cost" and "Total Cost" fields to prospect job reports. (Enhancement #8497)
4. Added "Private Notes" to the scheduler field options and Smart Pane. (Enhancement #8151)
5. Added "Private Notes" to history records. (Enhancement #7922)
6. Added a "Date Range" filter to the reminders section of the office screen. (Enhancement #7159)
7. Removed the 98 stop limit for Smart Routes. (Enhancement #8759)

Resolved Issues

1. Resolved an issue where "Display Invoice in QuickBooks upon Posting as Complete" was setting focus on QuickBooks and thus preventing Smart Service from opening. (Issue #8751)
2. Corrected an issue where the 'Scheduled Date' field on timesheet report was incorrectly populated with the completed date. (Issue #8740)
3. Fixed an issue where carriage returns copied to the clipboard could be entered into the contacts search screen. (Issue #8733)
4. Resolved an issue where a "Write Conflict" was created when saving a "To-Do". (Issue #8710)
5. Added additional verbiage to the "QuickBooks is not running" message to indicate the error number and error received from the QuickBooks SDK log. (Issue #8687)
6. Corrected "Check" to "E-Check" in the payments screen. (Issue #8614)
7. Fixed an "Invalid Use of Null" error when posting payments to the customer level. (Issue #8587)

8. Resolved an issue where the "Job Total" field would display $0.00 if no tax item was specified. This has been fixed on multiple report types. (Issue #8246)
9. Corrected an issue where converting a prospect job to a work order would close the scheduler. (Issue #7720)
10. Fixed an issue where skipping a job resulted in the job record having a "Skipped" status instead of a "Completed" status. The history record will continue to display as "Skipped". (Issue #5317)