Desktop Notifications for Phone Calls and Reminders

By enabling the new permission on employee profiles, office employees can now receive a desktop notification outside of Smart Service when the user has an upcoming phone call or reminder correspondence assigned to them. Smart Service will check for these notifications every 5 minutes and alert the user when the correspondence is upcoming. The notification is clickable and will take the user to the correspondence record for that phone call or reminder. (Enhancement #7763)

Employee Filter for "My Reminders" Screen

The "My Reminders" screen now includes filters to filter the screen by employee. This is to assist with finding reminders assigned to other users, particularly iFleet users since reminders are now sent to iFleet. We've also added a permission. (Enhancement #7763)

Update Pricing Per Job

The "update prices" button in the job items tab now checks your current item list prices in QuickBooks and sets the line item pricing on the job items added to the job to match the QuickBooks default price for that item. (Enhancement #9036)

Other Enhancements

1. Added functionality to use "Bundle" items from QuickBooks Online. (Enhancement #8942)
2. Added an option to disable the on-hand quantity display for job items from QuickBooks inventory sites under defaults in settings. (Enhancement #8941)
3. Added additional filters for audit log reports. (Enhancement #8966)
4. Added "Completed Date – Item Description" as an option for batch invoice item descriptions. (Enhancement #8988)
5. Added a permission to user profiles to hide or display phone calls and reminders assigned to the user in iFleet. (Enhancement #9027)
6. Added the ability to run "Get Balances" for active jobs only. (Issue #9057)
7. Added an "Assigned To" filter in the "My Reminders" screen. (Enhancement #9064)
8. Added the checklist feature to serviced equipment notes. (Enhancement #9070)
9. Revised the terminology on the warning label when attempting to access "Search" without the proper permission. (Enhancement #9072)
10. Modified the "Message All" button for text job reminders so that companies who prefer to manually dispatch text messages can do so without using the auto-send features. (Enhancement #9083)
11. Users can now drag and drop attachments into correspondence records. (Enhancement #9085)
12. Changed the wording on the "convert to prospect" button in the estimate center. (Enhancement #9087)

Resolved Issues

1. Resolved an issue where inactive employees would show up on the Google Calendar authorization list. (Issue #7827)
2. Fixed an issue where users could not scroll through notes using the scroll wheel on a mouse when looking through job instructions. (Issue #8810)
3. Corrected an issue where jobs created in Smart Service were set to bill to the customer record rather than the job's parent record in QuickBooks Online. (Issue #8933)
4. Resolved an issue where on-hand quantity records would be deleted when transferring inventory through the inventory module. (Issue #8936)
5. Fixed an issue where the QuickBooks Desktop reports button was showing up for QuickBooks online databases. (Issue #8977)
6. Corrected an issue where employees could not be inactivated while also listed in additional dates on inactive job records. (Issue #8990)
7. Resolved an issue where price breaks containing an apostrophe in the name could not be imported via the lookup tool. (Issue #8997)
8. Fixed an issue where the list limit check for QuickBooks Pro and Premier users would check individual list limits instead of the total names list limit. (Issue #9021)
9. Corrected an issue where the subtotal on purchase orders would calculate incorrectly. (Issue #9026)
10. Optimized the purchase order save process. (Issue #9031)
11. Resolved an issue where "other charge" type items in group items would have their quantity automatically set to 1 when imported into Smart Service. (Issue #9051)
12. Corrected an issue where converted prospect jobs were not being marked as "Awarded" for their job status upon conversion. (Issue #9061)
13. Adjusted the time validation on correspondences to include a 15 minute buffer from the scheduled start time of a correspondence record. (Issue #9067)