



Modern Invoicing Template for CardPointe Users

We've expanded our current invoicing functionality for the office and field with dedicated settings for businesses wishing to invoice and collect payment from their customers. Once the desired settings have been chosen inside of the Invoices tab in Settings, clicking on the "invoice" button for any job will display the new template, as will sending an invoice to a customer from Smart Service or iFleet.

The new invoice template has options to include customized colors, your job instructions, and your company logo to allow more personalization of the documents you send to your customers. The ability to calculate and display a due date based of the job's terms has also been added. Remember, we can implement a custom invoice template for Smart Service and iFleet at your request! (Enhancement #9224)

Other Enhancements

1. Added the parent record of a given job or estimate as an option for the waiting list columns. The name will be clickable and will open the parent record. (Enhancement #8333)
2. Saved payments will now be available on any record within a particular customer whereas previously your saved payments could not be used outside of the job's immediate parent record, such as a location. (Enhancements #8972 & #9238)
3. Added the option to assign a class per employee for lunches, breaks, and unaccounted time being sent over to the QuickBooks timesheet. (Enhancement #9180)
4. Job exceptions have been added to the column customization tool for Search. (Enhancement #9187)
5. Added the option to limit the resending of text and email reminders to customers if the scheduled date was not changed. (Enhancement #9239)
6. Updated the "Print Work Orders" screen in the office to include date pickers instead of a dropdown menu of dates. (Enhancement #9252)
7. Added the ability to double-click on an audit log entry and see the full value for that entry. (Enhancement #9256)
8. Added a warning when your text message balance is nearly depleted. (Enhancement #9259)
9. Added an option to list your company's address as the "Ship From" address for QuickBooks Online users. You can have this option enabled by reaching out to the support team. (Enhancement #7879)
10. Added the option to bill the parent record for jobs under locations for QuickBooks Online users. (Enhancement #9045)
11. Added the ability to read payment term details from QuickBooks so the due date on the invoice template and in history records can be calculated. (Enhancement #9247)

Resolved Issues

1. Resolved an issue where jobs that have been rescheduled on the scheduler would not update the Smart Service generated invoice number to match the new scheduled date. (Issue #7837)
2. Corrected an issue where a plus symbol would cause email addresses to be reported as invalid. (Issue #8407)
3. Fixed an issue where users attempting to create a new sales rep via Smart Service would receive an 'Enter Parameter Value' error. (Issue #8796)
4. Resolved an issue where the user would be presented with an error when using the 31-day view on the scheduler. (Issue #9079)



5. Corrected an issue where a user without a reminder scheduled could not use the “My Reminders” section to check on reminders for other users. (Issue #9144)
6. Fixed an issue where private notes on jobs were not logged by the audit feature. (Issue #9146)
7. Resolved an issue where a user could create a blank password for an employee profile. (Issue #9155)
8. Resolved an issue where jobs with additional dates outside of your scheduler’s time frame would produce a blank record. (Issue #9151)
9. Corrected an issue where private notes on estimates would not convert to the work order. (Issue #9204)
10. Fixed an issue where call results would default to a 15 minute interval when scheduling a follow up date for the call. (Issue #9219)
11. Adjusted the read/write location for the Smart Service Xml. (Issue #9223)
12. Resolved an issue where Smart Service was checking for inventory site counts when that setting was not enabled. (Issue #9230)
13. Optimized the duplicates check when adding or updating a customer’s SMS number on file. (Issue #9240)
14. Corrected an issue where the ability to switch a job to a location was present when the ability to create locations was disabled in Settings. (issue #9257)
15. Fixed an issue where the recurrence pattern “Daily every ___ day(s) without additional dates” would not properly clear the completed date field upon posting. (Issue #9266)
16. Resolved an issue when posting credit memos to QuickBooks Online. (Issue #9288)
17. Corrected an issue where routes covering more than one day in Smart Routes would not properly calculate travel times for subsequent days. (Issue #8952)
18. Optimized the NT Service’s ability to store and unzip handset activity when the NT Service’s server is experiencing memory errors. (Issue #9264)