Invoice Management Screen

We've added a new screen to the Office section Smart Service to view and manage Invoices posted from Smart Service. From this screen, you can filter to view open, overdue, or paid invoices, and filter by date or by days past due. You can open the record for each invoice, see the invoice information and open balance, and print or email selected invoices. To access the Manage Invoices screen, a user needs to have permission to post work orders.

With the addition of this screen, we've reorganized the Office section of Smart Service to improve organization. Some options have been moved or regrouped, but all existing options will still be present. We've also made some improvements to how payments are sent to QuickBooks, so payments will now be applied to the invoice they're connected to whenever possible. (Enhancement #9678 & 9690)

Other Enhancements

1. Manufacturer's Part Number and Preferred Vendor will now show up in Smart Service if they are filled out in QuickBooks. (Enhancement #1131, 9746 & 9747)
2. Added an option to display History records on the schedule based on scheduled time instead of timestamps. (Enhancement # 7653)
3. Added an option to reparent jobs when "Do not add jobs to QuickBooks" is enabled. (Enhancement #9056)
4. The End Time dropdown will now hide times that are before the Start Time. (Enhancement #9656)
5. Added a report field for Schedule Additional Employees reports which lists whether an employee is listed as an additional employee. (Enhancement #9659)
6. Added an option to create a saved payment method without immediately processing a payment. (Enhancement #9677)
7. Added a link to the Customer Portal under the Help menu for users with Settings access. (Enhancement #9695)
8. The Credit Limit field now displays two decimal points instead of four when used in a Mail Merge. (Enhancement #9729)

Resolved Issues

1. Fixed an issue where the Copy Data option was not available for a customer or prospect with no active subrecords. (Issue #9369)
2. Resolved an issue that occurred with Equipment Groups containing the # symbol. (Issue #9416)
3. Corrected an issue where dropdown entries would not be removed when the records they were used on were deleted. (Issue #9486)
4. Corrected a related issue where Service Agreement dropdown entries would not be removed when the customer connected to the Service Agreement was deleted. (Issue #9605)
5. Fixed an issue that would occur when using the "drop-down" format option was used on a Serviced Equipment User Defined Field. (Issue #9645)
6. Corrected an issue where Service Email was not an available option for Mail Merges. (Issue #9661)
7. Resolved an issue with the Lookup tool where unchecking the "Customer" checkbox would result in no results coming up, regardless of record type. (Issue #9684)
8. Fixed an issue that caused a potential queue error for certain inputs related to parent records. (Issue #9700)

9. Resolved an issue with not being able to search by Internal PO number if the field input was longer than 25 characters. (Issue #9703)
10. Corrected an issue with duplicate records appearing in the automated billing management screen. (Issue #9711)
11. Resolved an issue with Smart Routes failing to route certain addresses when using a 9-digit zip code. (Issue #9712)
12. Resolved an issue with refreshing the Automated Billing Management screen. (Issue # 9738)
13. Corrected an issue where clicking Preview on a batch invoice would not pull up the invoice preview if the custom Work Order option is enabled. (Issue #9745)
14. Fixed an issue that would sometimes cause an error message when adding an item to a Service Agreement. (Issue #9781)
15. Fixed an issue with Service Agreements that would cause an error if the Billing Frequency is set before an item is added. (Issue #9783)