



Enhancements

1. Create estimates from iFleet. iFleet users can now create estimates for their assigned customer from the field. This requires the iFleet user to have “add / edit” or “allow all” permissions granted to their Smart Service employee profile. Estimates can be marked as awarded by iFleet to be approved and converted into jobs by the office, or left for the office to schedule a follow-up. (Enhancement #4450)
2. Re-designed correspondence forms. All of the correspondence forms have been re-designed to provide a single screen view of correspondence, with the addition of critical contact information for phone calls. (Enhancement #4813)
3. Option to reset line-item quantities to zero for recurring jobs. An option has been added to Smart Service setup to have job item quantities reset to zero after posting the previous date. The option helps prevent overlooking entering changing quantities for each recurrence. (Enhancement #4583)
4. Hide / display “unit cost” and “total cost” fields. We’ve added an option to Setup which allows you to hide or display these fields. This is a global setting which will affect all users. (Enhancement #4371)
5. Longitude & latitude reporting fields. New fields for longitude and latitude have been added to reporting. These fields are available in customer, location, job, prospect, prospect location, and prospect job reports.(Enhancement #4582)
6. Hover mouse over summary bar to see the assigned user. The scheduler’s summary bars now display the assigned user’s name when the mouse is hovering over the summary bar. This is especially useful for customers who prefer a monthly calendar view. (Enhancement #4270)
7. Reporting for alerts. New fields for alerts have been added to customer, location, and job report types. (Enhancement #846)
8. Recurrence patterns are now set according to first scheduled date. All recurrence patterns will now be determined from the original scheduled date instead of the beginning of the year. When you add a recurrence pattern, the additional dates generated will be set according to month and day specified by that original date. (Enhancement #4699)
9. Disable service addresses from being added to the QuickBooks customer’s “Ship To” address list. An administrative option to disable the service address from being added to the customer’s list of service addresses has been added to the software. Please contact the help desk if you are interested in learning more about this option. (Enhancement #4817)

Resolved Issues

1. Resolved an issue where inactivated price levels would still affect customers in Smart Service (Issue #4793)
2. Corrected an issue where Sagekey would not place the correct target path for the Smart Service desktop shortcut. (Issue #4791)
3. Updated dialogue boxes for GPS tracking in Mobile Workforce and set display to open in the default system browser. (Issue #4742)
4. Fixed an issue where “Send Calendar to Outlook” would produce message 2950. (Issue #4820)
5. Resolved an issue where “Get” functions were not syncing with QuickBooks® Desktop. (Issue #4806)

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6. Fixed an issue where maximizing the job items tab produced message 2100 on higher resolution monitors. (Issue #4805)
 7. Corrected an issue where grouping or sorting by zip code on reports would not change the report. (Issue #4790)
 8. Extended width of “unit cost” and “total cost” columns for job items to prevent values from producing #### when those values exceed 6 significant figures. (Issue #4773)
 9. Added the domain “@community.church” to the list of approved domain names for email address validation. (Issue #4762)
 10. Corrected an issue where Smart Routes would not let you remove the assigned user. (Issue #4754)
 11. Optimized Contact Search to open with the cursor in the “Search For” box by default. (Issue #4745)
 12. Resolved an issue where employees with active jobs assigned to them could not be deleted. (Issue #4744)
 13. Expanded capacity of the “additional time payroll item field” in manually post timesheets. (Issue #4698)
 14. Email addresses added in Smart Service will now transfer to the job level in QuickBooks Online for customers who would like to email invoices. (Issue #4671)
 15. Fixed an issue where “import estimates” would not function for QuickBooks Online users. (Issue #4664)
 16. Corrected an issue where the “summary bars” on the scheduler would not calculate totals correctly for jobs with a recurrence pattern. (Issue #4626)
 17. Resolved an issue where certain report filters would produce an ODBC error when added. (Issue #4616)
 18. Updated “advanced routing” to display the correct map when jobs assigned to one employee are routed to another. (Issue #4601)
 19. Added compatibility for low resolution monitors when observing the Service Agreement Module screen. (Issue #4581)
 20. Resolved an issue where billable items added to the job from a purchase order would use unit cost / total cost for the amount being charged to the customer instead of the sales price set in QuickBooks®. (Issue #4544)
 21. Added functionality for converting estimates in Mobile Workforce instead of posting to QuickBooks®. (Issue #4366)
 22. Expanded length of additional date fields to prevent ### from being displayed instead of the chosen date. (Issue #4734)
 23. Corrected an issue where documents deleted from the “SSX Images” repository would still be displayed in History / Documents. (Issue #4692)
 24. Added an option in “Setup” to toggle prospect and job user defined fields on estimates. (Issue #4662)
 25. Fixed an issue where job exceptions were able to be selected on customers and locations. (Issue #4662)
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