



Smart Service

# 10.94 Release Notes

## Enhancements

1. Re-design of Purchase Orders in Smart Service / New Cost Fields on Job Items. We've redesigned how purchase orders are handled in Smart Service. Now, Smart Service will display purchase orders and billable items when the job items tab is opened, making it apparent when an open purchase order is pending or a billable item has been received. Smart Service provides shortcuts to make it easier to create purchase orders from job items, receive purchase orders and add billable items to the job—all syncing with QuickBooks® Desktop and QuickBooks® Online. In addition, Smart Service now includes editable cost fields on each of the line items for customers that want to edit item costs on the fly. (Enhancement #4140 and #4204)
2. Mass update customer and job information. Smart Service now has the ability to mass update records using the “Copy Data” function. Choosing this option on a customer record allows you to mass update information (such as a phone number) on either specific records or all locations and jobs for that customer. (Enhancement #4201)
3. Job Exceptions field added. Smart Service now includes the ability to add customized "Job Exceptions" to flag jobs from iFleet that require further office action before completion. The Job Exception is displayed in the Enter Work Orders screen and on the job user fields tab. (Enhancement #4218)
4. Smart Routes Enhancements. Smart Routes now provides an interactive map with enhanced directions, a map preview in Advanced Routing, and the ability to re-order, add, and delete stops. (Enhancement #4073)
5. Use existing reports as templates. To the right of the Report's name in the report customization icon, is an option for saving a second copy of your existing report. This is useful for creating a secondary copy of a favorite report for further alteration. (Enhancement #499)
6. Customized terminology for prospect management. The term “prospect” has been replaced with terms chosen by you. You may specify which term is used via the “Estimate” tab in Smart Service Setup. (Enhancement #4111)
7. Customizing Contacts Search Screen. Now you can customize which columns appear and the order of the columns in contacts search. Smart Service will save your last view allowing you to personalize your contact screen. (Enhancement #4130)
8. Smart Pane displays recurring job information. When a job is a recurring job, the Smart Pane now displays information about the previous visit including the date of the prior job, the employee performing it, and the start and end times. (Enhancement #4113)
9. Reporting fields for equipment quantity and rate. Reporting fields have been added for equipment quantity and rate to help track customer owned equipment. (Enhancement #1667)

10. Address information sent to Google Calendar now omits customer name as part of the address when linked to Google Maps. This is meant to relieve the user from removing the name before mapping the address. (Enhancement #3409)
11. Added mail merge functionality for customers with custom service agreements. You may switch between a custom service agreement and a mail merge using the service agreement section of Smart Service setup. (Enhancement #3995)
12. A confirmation prompt is now displayed when attempting to resend a job to an iFleet device. This is to warn the user that resending the job in questions will overwrite any changes the iFleet user has input on their device. (Enhancement #4108)
13. Inactive employees are hidden by default. When opening the employee section of Smart Service, inactive employees are no longer displayed by default. Inactive employees can be toggled on and off by checking the "Show Inactive" box. (Enhancement #4112)
14. Phone calls to Google Calendar. When sending a scheduled phone call to Google Calendar, the phone number on file for the customer will be sent to the calendar. (Enhancement #4132)

## Resolved Issues

1. Resolved an error in the display of the scheduler when the smart pane is opened on high resolution monitors. (Issue #4098)
2. Resolved an issue where estimates would not print in order based on scheduled time from Office Tab. (Issue #4127)
3. Resolved an issue with "View Completed Jobs Only" when using "Post All" feature in Enter Completed Work Orders. (Issue #4143)