



Routzy for Smart Service

3.5 Release Notes

Enhancements

1. Estimates in Routzy now have the ability to have customers purchase services online. Using the new “Purchase Button Settings” option in the Routzy Settings Menu, a purchase portal can be set up and displayed on proposals. An option has also been added in the Send Proposal Options menu to display or hide the purchase button. (Enhancement #4237)
2. Notes added to a follow up activity will be displayed on the activity list for the prospect. (Enhancement #4227)
3. Contacts without a picture now display their initials next to their name inside of the contacts menu, instead of a blank silhouette. Once a contact picture has been added it will replace the initials. (Enhancement #4239)
4. Multi-Page Terms and Conditions. Routzy now supports multi-page terms and conditions on proposals. (Enhancement #4225)

Resolved Issues

1. In Smart Service mode, the proposal source field is respected on the proposal source summary analytics report. (Issue #4021)
2. In Smart Service mode, field widths correspond with Smart Service maximum field widths. (Issue #4043)
3. Resolved an issue where company address would not display on Proposal. (Issue #4044)
4. Resolved an issue that prevented the user from creating drawings in landscape orientation. (Issue #4045)
5. Corrected the display of company name and address in Standalone Mode. (Issue #4046)
6. Added compatibility with Bluetooth keyboards (Issue #4047)
7. Corrected verbiage for disabling service addresses on proposals. (Issue #4048)
8. Added fillable PDF form compatibility with Bluetooth keyboards. (Issue #4135)
9. Fixed an issue hindering certain job statuses from displaying in proposal summary report. Each job status is now assigned a color code to make the graph easier to read. (Issue #4224)
10. Resolved an issue with Forms inactivating incorrectly. (Issue #4232)The default email notification sent to customers when a tech is traveling to the job site has been corrected. (Issue #4292)
11. Corrected an issue with strict time stamping that caused the application to crash. (Issue #4293)
12. Work order price preferences correspond with Smart Service preferences chosen in the work order tab of setup. (Issue #4294)
13. Resolved an issue causing additional time stamps to crash the application. (Issue #4295)