



Smart Service

10.93 Release Notes

Enhancements

1. Smart Routes: New Route Optimization and Mapping Add-On. With Smart Routes, Smart Service users can create an optimized route with the click of a button. It's our replacement for the MapPoint integration. Smart Routes is an optional add-on to Smart Service. Contact us for pricing and setup information. (Enhancement #3603)
2. Better File Naming for iFleet Documents. Previously, documents completed in iFleet were saved with file names that used a numeric identifier. Now, documents are saved with file names following the following naming convention for easier identification: [Customer Name] – [Document Template Name] – [Date]. (Enhancement #3849)
3. Easier Access to iFleet Documents. Smart Service now stores the document name for all documents completed in iFleet and displays the document name when the user selects *Documents* from the dropdown selection in the *History/Docs* tab under any Customer or Location window. Smart Service also opens the images folder for a selected job when the user clicks the *Open Images Folder* button. (Enhancement #3977)
4. Scheduler Setup: Added Service Address 4. Allows the selection of Service Address 4 when setting the Schedule Fields under the *Scheduler* tab in setup. (Enhancement #2019)
5. Locations Report: Last Service Date. The last service date now displays on the Locations Report. (Enhancement #3919)
6. Include item description for equipment. Previously, when a user added equipment to a job and then selected an item associated with that equipment, Smart Service would show only the equipment description and not the associated item description. Now, Smart Service will display the item description for the selected item followed by the equipment description. (Enhancement #3745)
7. iFleet Option to Hide Billing Address. Smart Service now has an option in Smart Service setup to hide the customer's billing address in iFleet. (Enhancement #3936)
8. New Employee Privilege Settings. Smart Service now has two additional employee privilege settings—*Disable Access to Contacts* and *Disable Access to Reporting*—that will disable access to those areas from the Home window.

Resolved Issues

1. Resolved an issue of automatically selecting customer and location notes fields when the notes tab was opened, which could cause a user to inadvertently overwrite existing notes. (Issue #3562)

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2. Resolved an issue in Service Agreements where clicking on sales rep would cause the job items list to open. (Issue #3609)
3. Resolved issue that would intermittently prevent Quick Books Online users from updating customer lists. (Issue #3825)
4. Convert prospect's additional contacts when prospect is converted to a customer. (Issue #2166)
5. Resolved user permissions issue with completing jobs in Mobile Workforce. (Issue #3170)
6. Resolved an issue causing an ODBC error when deleting locations in the inventory module. (Issue #2066)
7. Resolved a user permission issue when posting timesheets in the *Manually post timesheets* window. (Issue #3704)
8. Resolved an issue preventing correct color coding in Scheduling for job categories that contain a single quote character in the category's name. (Issue #3518)
9. Resolved an issue that could create an incomplete invoice in QuickBooks® when Smart Service encounters an error when a user is posting a job. (Issue #3887)
10. Resolved an issue that prevented the user from correcting job time entries that span over two days when posting jobs with the option to *Send job times to QuickBooks® time sheet*. (Issue #3935)
11. Fixed tab order in the additional contacts section in the Customer window. (Issue #3946)
12. Removed deleted and inactive employees from the *Send To* list in text messages window. (Issue #3929)
13. Added additional validation rules for email field in the Customer window. (Issue #3937)
14. Resolved an issue that caused an error when a user clicked the *Get Estimates* button in the Job Items tab of a Job window and an estimate had a blank estimate number. (Issue #3871)
15. Resolved an issue that would create a blank correspondence record when the user created a phone call or reminder from the right-click menu on the Scheduling window and closed the window without clicking the *Save* or *Cancel* buttons. (Issue #3890)
16. Resolved an issue that would cause the item list to open on the Job Items tab when opening another window and then clicking back to the original Job window. (Issue #3894)
17. Resolved an issue that would cause the '*Sign In with Intuit* button to continue with QuickBooks Online login' to not appear in Smart Service. (Issue #3364)
18. Resolved an issue that would cause an error when posting a job containing job notes in excess of 4,000 characters. (Issue #3889)
19. Resolved an issue wherein tax codes were not getting sent to iFleet devices. (Issue #4003)