



Enhancements

1. Excluded dates for recurrence patterns on jobs. Recurrence patterns can now be set to end on a given date or exclude date ranges. This feature will allow users to define a recurrence pattern, but automatically omit for excluded date ranges—a great feature for customers with seasonal recurring jobs. The new “Ends After” field is also available as a reporting field. (4998)
2. Customer email as a required field for Smart Service Users. For companies who wish to always have their customer’s email address on file, Smart Service now has the ability to require this information on all records. To enable this option, click the required fields tab in Smart Service Setup. (Enhancement #4993)
3. Customized categories for custom colors on jobs. Custom colors for jobs can now be associated with category labels. The categories serve as your company’s labels for custom colors—essentially a key that anyone can understand at a glance. And, because custom colors can be assigned to a category, Smart Service now includes the ability to report on these custom color categories. The customization options can be found in the scheduling tab of Smart Service Setup via the “Setup Scheduler Color” button. (Enhancement #4999)
4. Equipment model and serial numbers as required fields for iFleet users. Smart Service now has the ability to require model and/or serial numbers in iFleet. As with required fields in Smart Service, the iFleet user will be prompted to enter the required fields and will prevent the user from leaving the equipment record until the required fields are populated. This option can be enabled within Smart Service Setup under the iFleet tab. (Enhancement #5006)
5. Create and schedule estimates directly on the calendar. The ability to “Add Estimate” has been included on the Scheduling Board. To use this feature, right click anywhere on the scheduling board and select the prospect you wish to create an estimate for. (Enhancement #4991)
6. Certified addresses include a visual indicator once certified. The address certification checkmark will change color to green once the address in question has been certified. This will let the next user know that the address has already been confirmed via USPS. Addresses that cannot be certified will remain blue checkmarks, and upon transferring a certified address from billing to service and vice-versa, the checkmark for the transferred address will also become green. (Enhancement #4992)
7. Expanded view of job item descriptions in history records. For longer job item descriptions, the user can click on the newly added magnifying glass icon to view the full item description without having to retrieve and open up the inactive job. (Enhancement #4900)

Resolved Issues

1. Fixed an issue where the “add equipment” feature would overwrite the line item’s default pricing using the equipment rate, even when the equipment rate is 0. (Issue 5001)
2. Corrected a label typo in Smart Service Setup. (Issue #4846)
3. Resolved an issue where non-recurring jobs would not inactivate upon posting regardless of setting (Issue #4958)
4. Outdated options cleaned out from Smart Service interface. (Issue #4913)
5. Resized Smart Service Dashboard reports to accommodate longer field values. (Issue #4915)

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