Release Date: 06/12/2017

Release Notes

Version 1.23.00

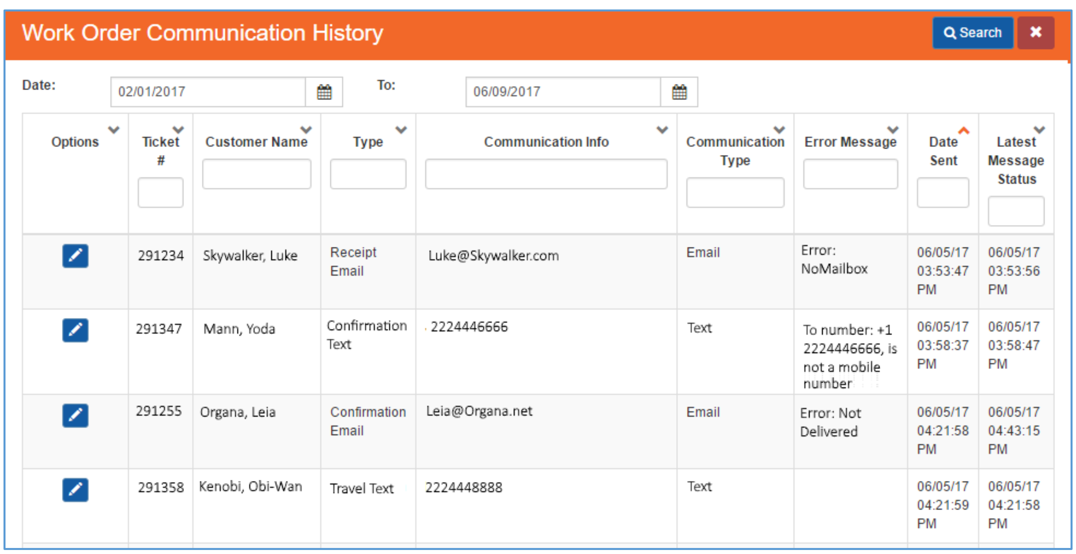
SmartWare

Accounting

- *QuickBooks Transfer:*
    - Resolved issue where QuickBooks Transfer was including unused parts amounts for a work order in the Sales 'Amount' column

Communication

- *Communication History:*
    - Added new 'Communication History' feature to SmartWare



Options	Ticket #	Customer Name	Type	Communication Info	Communication Type	Error Message	Date Sent	Latest Message Status
	291234	Skywalker, Luke	Receipt Email	Luke@Skywalker.com	Email	Error: NoMailbox	06/05/17 03:53:47 PM	06/05/17 03:53:56 PM
	291347	Mann, Yoda	Confirmation Text	2224446666	Text	To number: +1 2224446666, is not a mobile number	06/05/17 03:58:37 PM	06/05/17 03:58:47 PM
	291255	Organa, Leia	Confirmation Email	Leia@Organa.net	Email	Error: Not Delivered	06/05/17 04:21:58 PM	06/05/17 04:43:15 PM
	291358	Kenobi, Obi-Wan	Travel Text	2224448888	Text		06/05/17 04:21:59 PM	06/05/17 04:21:58 PM

Work Order Communication History

- The Communication History feature will allow you to view all work order communication history for a given time frame and any potential errors associated with the communication messages.
- The Communication History feature can be found by navigating to *Communication | Communication History* from the main menu
- The Work Order Communication History panel will load allowing you to view information about the communication records for a specific date range

- In the ***Date:*** field enter in a starting date you would like the search to begin on
- In the ***To:*** field enter in the ending date you would like to search through

- Next, click the Search (Search) button in the top right of the Work Order Communication History panel
- A list of results matching your date range will be returned
- Below is a list of each field available from the Communication History grid:

Column	Functionality
Options	Displays a list of work order options: • (edit WO): Will open the work order allowing you to view information about the work order and make changes if needed
Ticket #	Displays Ticket # from the work order that the communication message was for
Customer Name	Displays the Customer Name from the work order that the communication message was for
Type	Displays the type of message that communication was triggered by: • Confirmation Email • Confirmation Text • Receipt Email • Travel Text
Communication Info	Displays the Customer phone or email address used to send the communication message
Communication Type	Displays the communication type that was sent: • Email: Indicates that an email was sent to the customer for the selected Communication Info • Text: Indicates that a text message was sent to the customer for the selected Communication Info
Error Message	Indicates if there was an error received when trying to send the communication message to the customer. If no message appears then the communication record was successfully sent
Date Sent	Indicates the date and time SmartWare first attempted to send the communication message to the customer
Latest Message Status	Indicates the last date and time SmartWare received a status response for the communication message that was sent

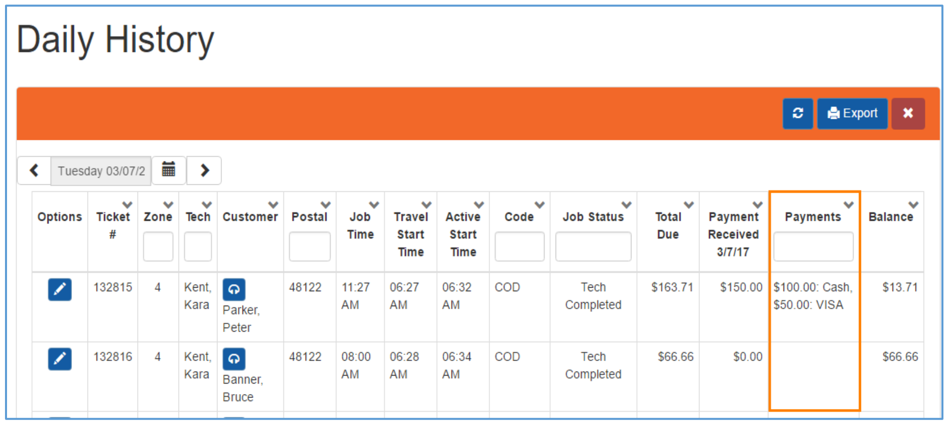
Customer

- ***Tabbing Sequence:***
  - Made the following change to the tabbing sequence when creating a new Customer Address:

- Changed tabbing sequence to jump from Address 1 to Postal Code. Previously tabbing was taking you from Address 1 to Address 2 then to Postal Code.

Dispatch

- ***Daily History:***
  - Added 'Payments' columns to the Daily History grid
    - **Payments (column):** Will display a list of payment types and payment amounts that were received for the work order during the selected date range



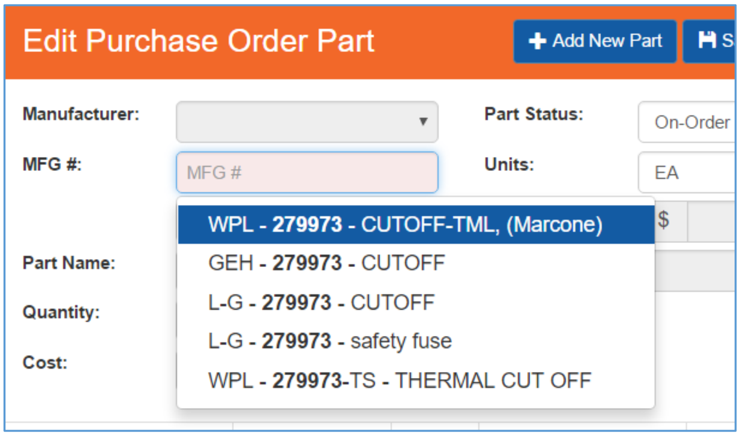
Daily History

  - Changed 'Payment Receive' column to only display a sum of payments that were received for the work order during the selected date range
  - Made following changes to Daily History Export:
    - Added 'Payments' column to export
    - Resolved issue where 'Total Due', 'Payment Received' and 'Balance' columns on the export were not displaying any values
- ***Dispatch:***
  - When navigating away from Dispatch panel and back, the Dispatch grid will now stay loaded to the same grid page you were viewing when you initially left Dispatch
- ***Routing Setup:***
  - Changed wording for 'Anytime Avail Hours' column label to 'Standard Avail Hours'

General

- ***General:***
  - Additional improvements and minor fixes implemented to help with performance

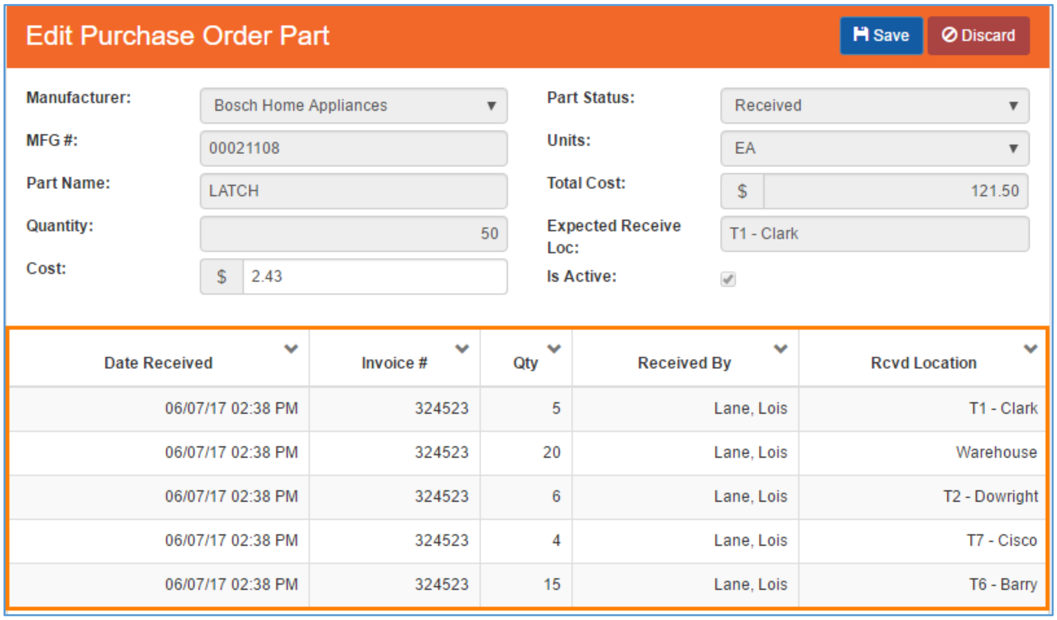
- *Parts:*
  - MFG # type ahead fields will now include the manufacturer code in the drop-down list return making it easier to identify parts with the same MFG # but from different manufactures



Edit Purchase Order Part

Material

- *Parts:*
  - Resolved issue where Parts panel was loading in a pending state preventing users from clicking the 'Add Part to Location' or 'edit' button under the Locations section
  - Resolved issue when creating a new part from either the iPad or SmartWare was not always properly setting the customer price
- *Physical Inventory Scan:*
  - Resolved issue when scanning a part that was previously marked inactive on a location was properly updating the location part quantity but was not marking the part as active on the location
- *Purchase Orders:*
  - Changed label for 'Receive Location' field to say 'Expected Receive Loc:'. This change was made on both the Part (edit) and Part (receive) panels for a purchase order.
  - Added grid on purchase orders to display part receiving information. Grid will display on both the Part (edit) and Part (receive) panels for a purchase order.



Edit Purchase Order Part

Reports

- ***Customer With Lead Sources:***
    - Changed report name from 'Customer With Lead Sources' to 'Customers'
- ***Customers:***
    - Added following columns to the Customer report:

Column	Functionality
Customer Type	Displays Customer Type associated with the Customer Name • **Residential**: Indicates that Type: Residential was selected from the Customer panel for the specific customer • **Commercial**: Indicates that Type: Commercial was selected from the Customer panel for the specific customer • **Contact**: Indicates that the customer name record is associated with a contact record for a customer
Address1	Displays Address 1 field information as it appears from the 'Customer Address' panel for the customer
Address2	Displays Address 2 field information as it appears from the 'Customer Address' panel for the customer
City	Displays City field as it appears from the 'Customer Address' panel for the customer
State/Province	Displays State/Prov field information from the

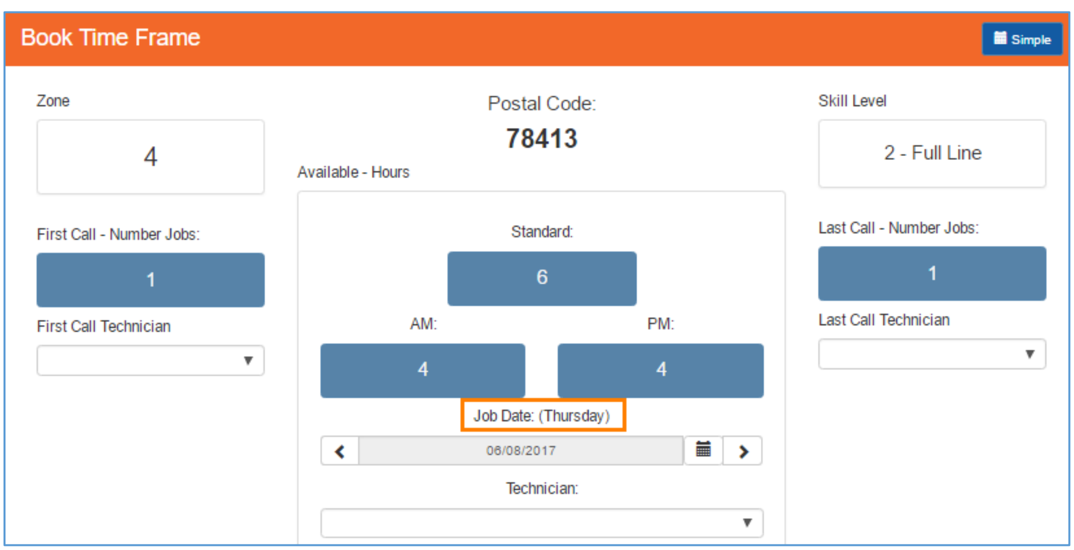
	'Customer Address' panel for the customer
Postal Code	Displays Postal Code field information from 'Customer Address' panel for the customer
Phone Number(s)	Displays primary phone numbers from the 'Customer Communication Info' panel for the specific customer
Email Address(es)	Displays all email addresses from the 'Customer Communication Info' panel for the specific customer

Work Order

- *Adjustments:*
  - Resolved issue where not selecting a task to associate a credit memo with was not appropriately dividing the credit memo amongst all task. This was resulting in a 'Bad Account Code' message when trying to transfer Adjustments to QuickBooks.
- *Bucket Scheduler:*
  - Made following changes to labels on the Bucket Scheduler:

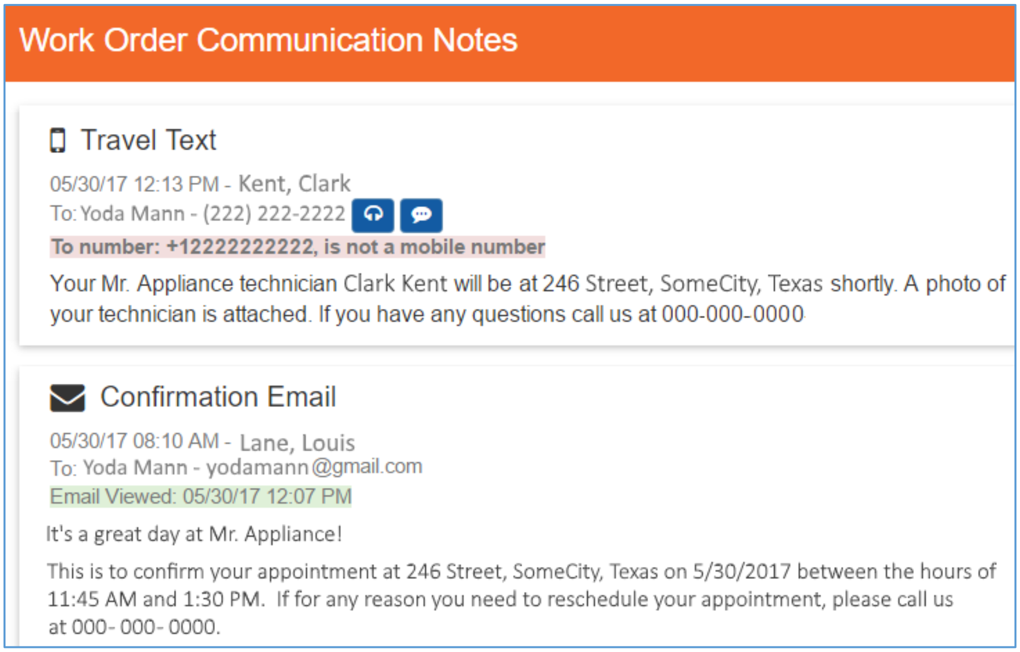
Original Label	New Label
Before-Noon:	AM:
Anytime:	Standard:
Afternoon:	PM:

  - Day of week selected will now display to the right of Job Date. Day of week is based off the date that is currently selected in the Job Date field.



Bucket Scheduler

- *Communication Notes:*
  - Improved work order communication notes to display sender name, date/time sent, recipient information, and communication status



Work Order Communication Notes

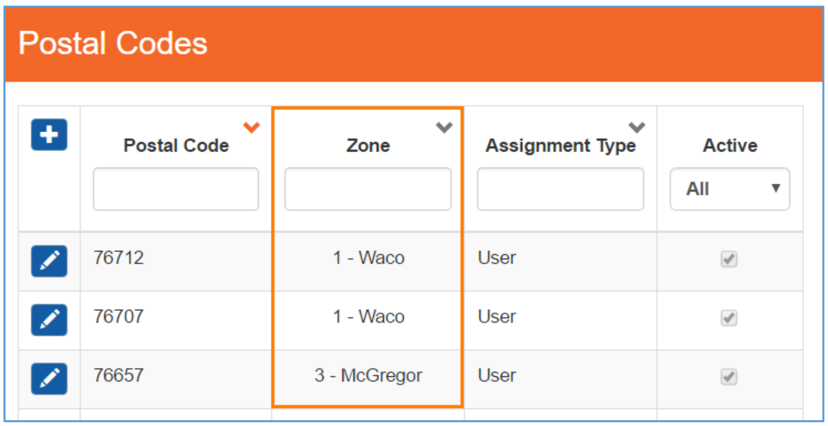
- *Notifications:*
  - Resolved issue where Notifications panel was sometimes failing to load properly and instead was loading with all notification options unchecked
- *Print:*
  - Selection of Print | Email Invoice from a work order will now generate better messages informing the user if there are issues that are preventing the emailing of the Invoice (i.e. Please save work order changes first)
- *Work Order - Search:*
  - Added 'Claim Info:' field as a search criteria to the work order search panel allowing users to search based on the claim information entered on a work order
  - Added 'Contact' field as a search criteria to the work order search panel allowing users to search based off customer contact names.
    - 'Contact' search field uses a typeahead method which will return a list of customers based off an exact match on last name to the information you typed in. Users will be required to select an exact match on contact name to search by
    - 'Contact' typeahead results will return a maximum of 20 results to select from
  - Changed label on 'Name' search field to 'Customer Name'.

- ‘Customer Name’ search field will return results based off partial matches allowing you to type a portion of a customer’s name and view all results that contain the content.

  - Work Order Search Export will now include a column to display the technician’s name
  - Added space to the search criteria label for ‘Ticket #’. Prior to change the label read ‘Ticket#’

Setup Franchise

- *Options – Postal Codes:*
  - Added ‘Zone’ column to the Postal Codes grid.



Setup Franchise: Postal Codes