

RELEASE NOTES

Field Service
ManagementES

powered by **corrigo**

Summer 2010

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Release Notes

Intuit Field Service Management

Summer 2010

Highlights

This is a minor release with most changes occurring behind the scenes, so there is very little end user impact.

There were however a few changes made to improve user experience for a few usage scenarios.

- In the QuickBooks Integration Client
 - The ability to put the name of the primary tech on the QuickBooks invoice no longer depends on the TimeCard module
 - For customers who do not want to post invoices directly, there is a new setting that can make all new invoices coming into QuickBooks “Pending” so that they do not post to the general ledger
 - On Mobile, there is an optional update available that is primarily of interest to users in companies that are also members of the Work Order Network powered by Corrigo.
 - On the desktop there are a couple of minor changes driven by customer requests.
-

QuickBooks Integration Client

Primary Tech to Rep in QuickBooks

In the past the Time Card module was required in order to see the primary tech name in the rep field in QuickBooks. This requirement has been relaxed. No additional configuration is required.

Create invoices as pending

In cases where customers make changes to invoices in QuickBooks after they are imported from Service Management, it may be helpful to have the invoice come in as “pending” so that it does not post to the GL until it has been reviewed and explicitly changed to Final.

To set this up go to the integration settings from within QuickBooks and choose the Advanced tab on invoices. Then check Create Invoices as Pending

Please fill invoice synchronization settings

Invoices

Basic **Advanced**

Most users don't need to configure this. You need to configure the following fields only if you had been creating invoices using WorkTrack without QuickBooks Integration for a while. In that scenario you will have some generic labor, parts and miscellaneous categories in WorkTrack which you need to map to QuickBooks Other Charge items.

Pick an existing QuickBooks Other Charge item or create a new one for the following WorkTrack generic items by clicking on the '+' icon below.

Generic labor item

Generic parts item

Generic miscellaneous item

Choose a numbering scheme for invoices exported to QuickBooks:

Use WorkTrack Invoice Numbering

Use QuickBooks Invoice Numbering

Note: Use this scheme if you also use QuickBooks to create invoices. This will pick the last invoice number in QuickBooks and increment it for the invoice imported from WorkTrack.

Create invoices as Pending

< Back Next > Cancel

Figure 1. Sync Settings

Customer: Job
Luigi's Italian Restaurant

Class

Template: Intuit Product Invoice

Date: 07/28/2010 Invoice #: wo-0610

Ship To: Ship To 1
1301 Palmetto Ave
Pacifica, CA 94044
US

Bill To:
1301 Palmetto Ave
Pacifica, CA 94044
US

P.O. Number Terms Rep Ship Via F.O.B.

Quantity	Item Code	Description	Price Each	Amount	Tax
	3SBE-A1187	15 Replace Belt; V (FHP), With Motor Replacement	67.38	67.38	Tax
	3SBE-A1186	15 Replace BELT; V (FHP), Larger than 48"	64.13	64.13	Tax

Customer Message

Tax: CA Tax (8.25%) 10.85

Total: 142.36

Payments Applied: 0.00
Balance Due: 142.36

Customer Tax Code: Tax

Memo

Learn about our online invoicing solution.

Save & Close Save & New Clear

Figure 2. Non-Posting Invoice

Desktop

Improve Text on Integration Settings Page

To assist users when deploying the system with QuickBooks integration or installing new machines, the test on the Integration Settings page has been changed. The intent of this change is to make clear to the end user that they can make a selection of their choice for the authentication code.

QuickBooks Integration Settings

Do you want to integrate with QuickBooks? Yes Edit

Integration Client Authentication Code: ***** Edit

Company Name: v610 qa live

You must download and install our client in order to integrate with QuickBooks.

Install Corrigo QuickBooks Integration Client

Recommended Best Practice Workflow for Invoices:
Not Prepared -> Prepared -> Approved -> Exported
Note: Invoices will get to Exported state automatically when export happens.

Choose an authentication code you can remember and enter it here. You will also have to enter this in the QuickBooks integration client in order to run the Sync.

Figure 3. Text Change on Integration Settings

Service Agreement: Extend Start Date to Two Years

For customers who sell extended warranties and a few other cases, it is necessary to set the start date for the first visit of a service agreement more than one year in the future. The max future date for the first visit is now two years in the future.

Add Site Address to Waiting on Acceptance Alert

For Service Management customers who are also receiving work over the Work Order Network the waiting on acceptance alert has been enhance to include the site address for the work. This will enable users who are not mobile to better assess whether they wish to accept new request over the network based on the address where the work is requested.

Invoice List View Work Order Status Filter

To make it easier for office staff to price up invoices, the both the Not Prepared and Prepared invoice lists now have a work order status filter. This will enable billers to find and price the work orders that are completed without being distracted by those that are still pending.



Figure 4. Invoice List WO Status Filter

Invoice Edit Pages Support for Negative Quantity

For customers who take returns or use ad-hoc discounts through negative quantities as an operation practice, the application now supports negative values in the quantity field for Parts, Miscellaneous and Price List items but not for Labor.

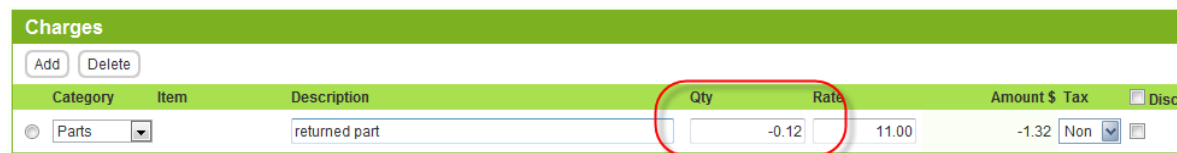


Figure 5. Negative Quantity on Invoice

New Print Template for Invoices

For customers who would like to use invoices as estimates, there is a new print template in the system that shows the invoice status in the title bar. This enables user to create a custom invoice status called estimate and use the invoice print as an estimate for their customers.

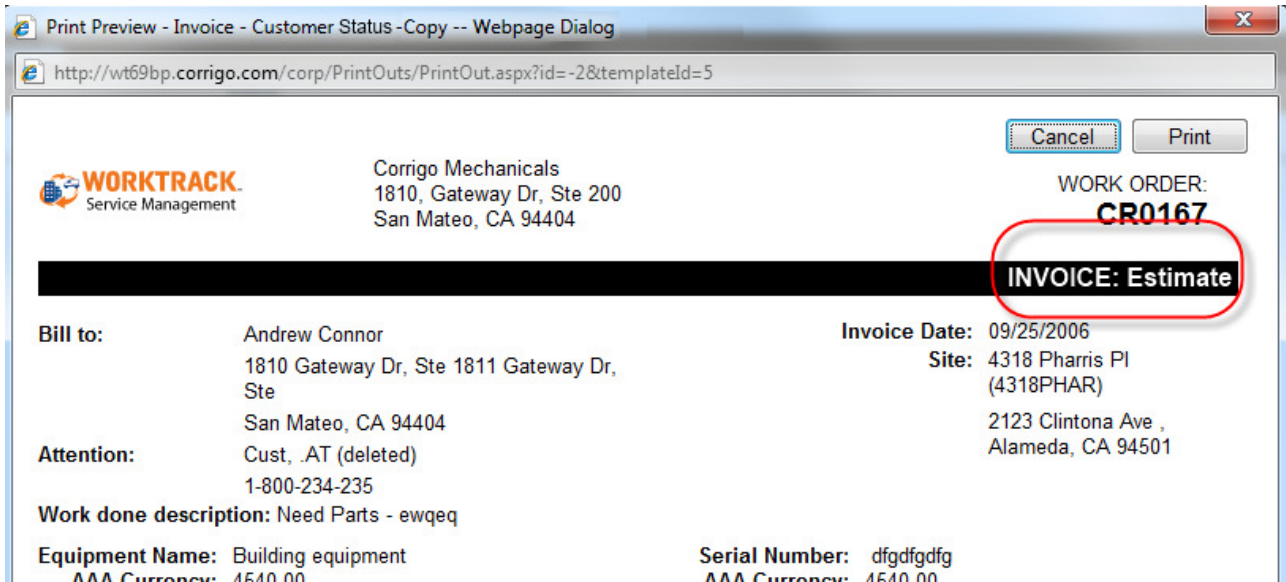


Figure 6. Print Template with Status

? Questions:

Call support at 800-517-2871 or by email at 800-517-2871

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