RELEASE NOTES

Field Service Management ES

powered by corrigo

Summer 2010

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Release Notes

Intuit Field Service Management

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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" to 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

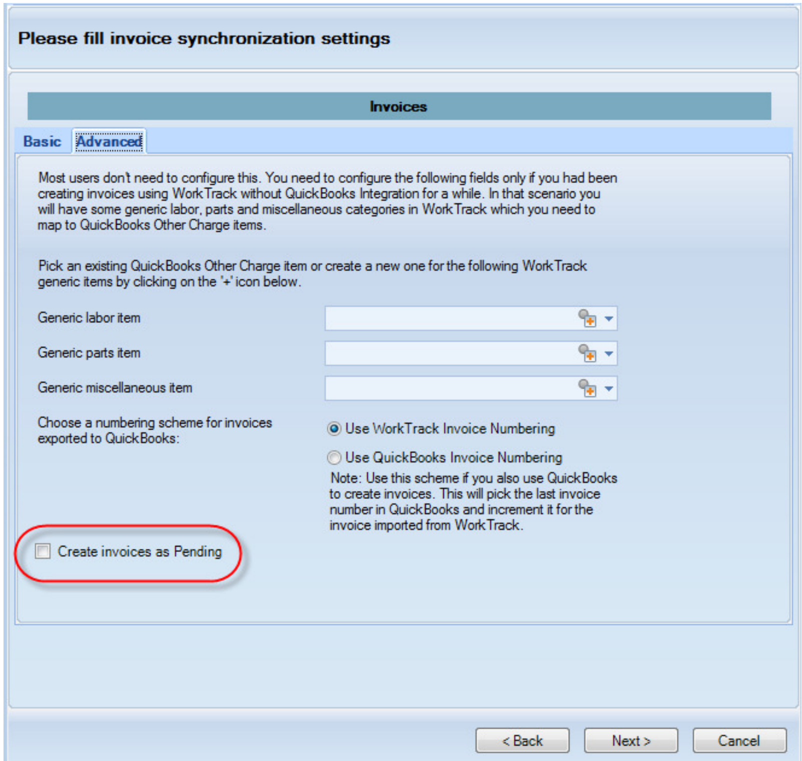

Figure 1. Sync Settings

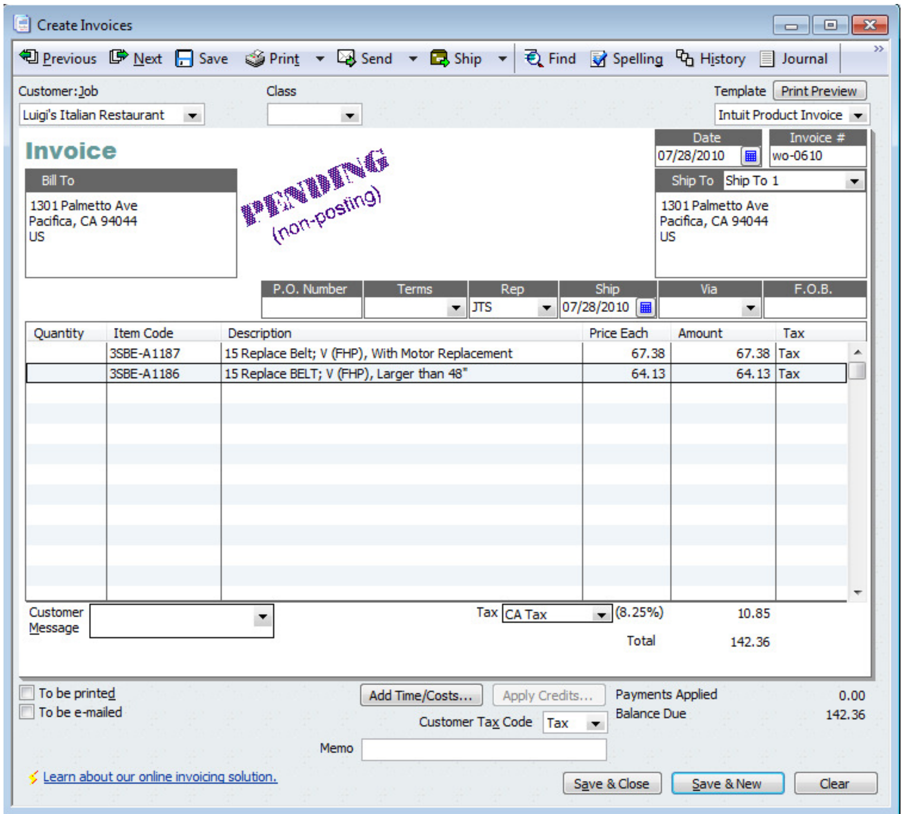

Figure 2. Non-Posting Invoice

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 it to make clear to the end user that they can make a selection of their choice for the authentication code.

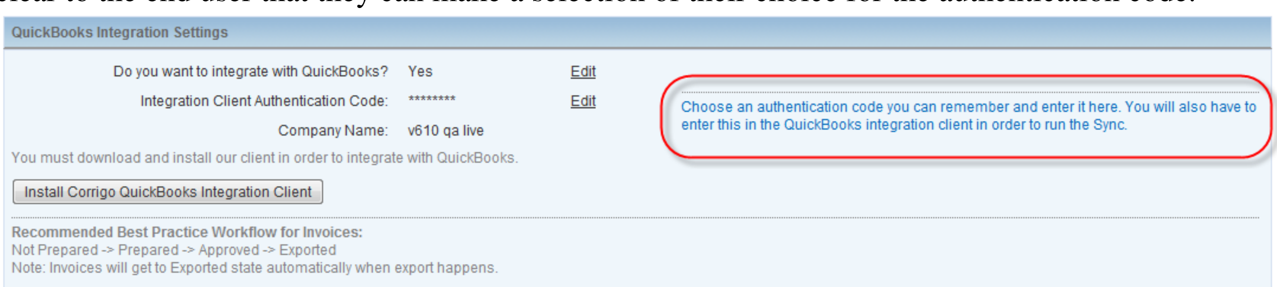

Figure 3. Text Change on Integration Settings

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.

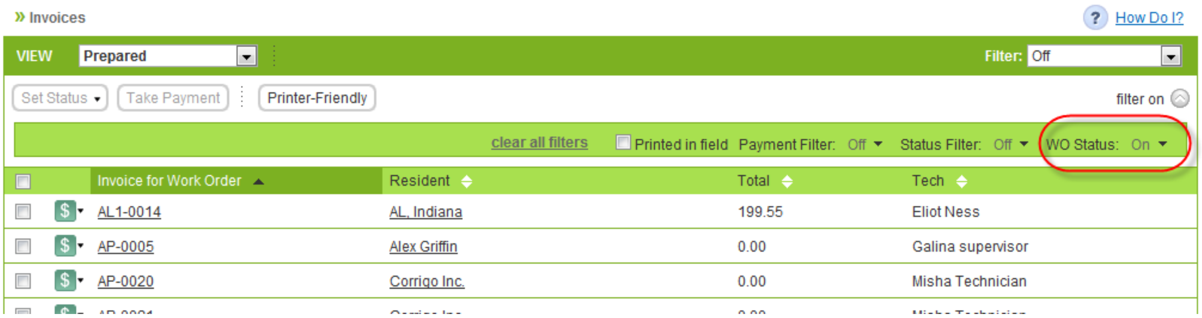

Figure 4. Invoice List WO Status Filter

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.

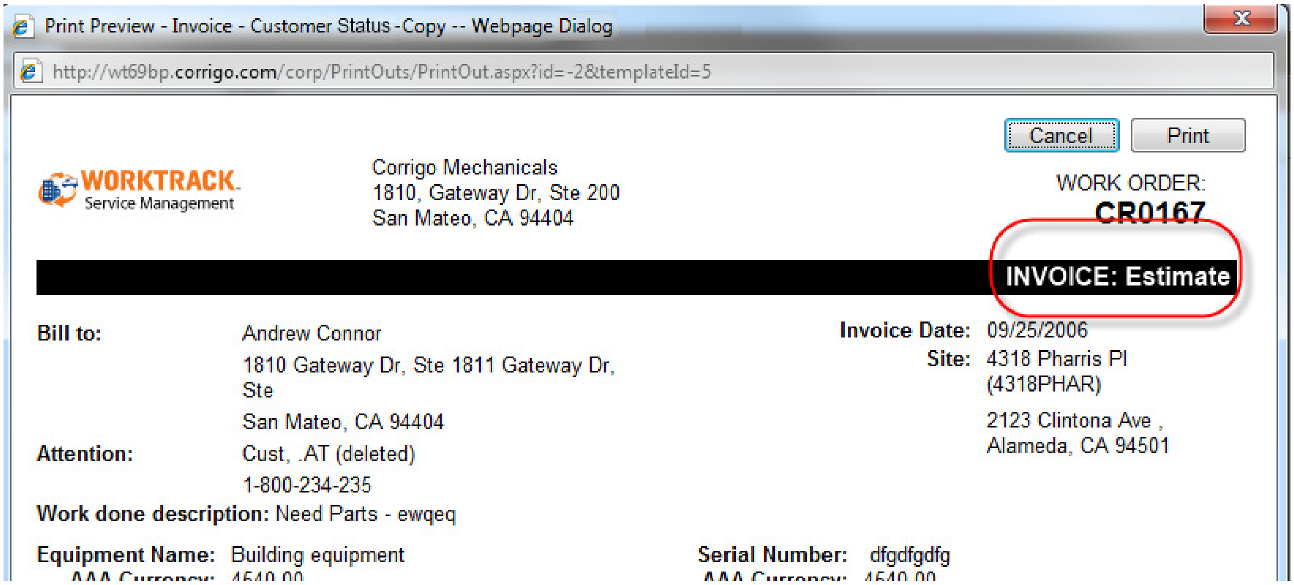

Figure 6. Print Template with Status

? Questions:

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