

# Release Notes

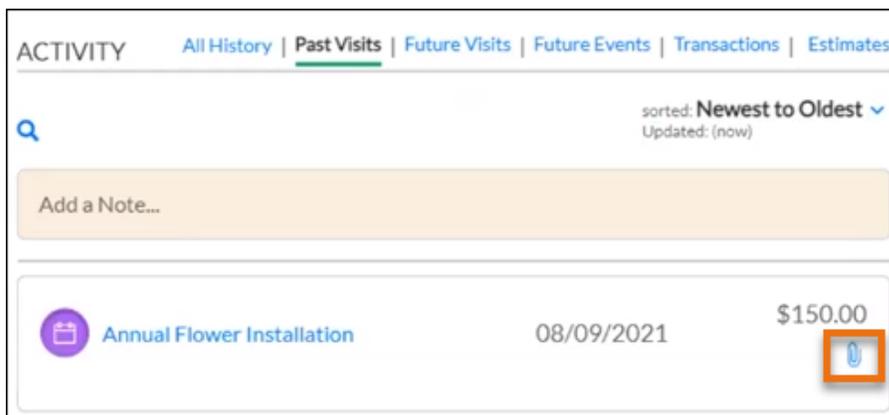
August 20, 2021

The theme of this release is *Make Life Easier*. We continue to improve, clarify, and polish different areas around SA based on your feedback. This release includes enhancements to the **Accounts** screen and **Activity Stream**, new previews on some **Review** screens, and many improvements to the **Client Portal** and **Client Portal app** (because we want your clients' lives to be easier too).

## Enhancements

### Account Activity Stream

- On the V2 and V3 **Account Activity Stream**, the **Past Visits** tab now indicates if there are **attachments** from the visit.



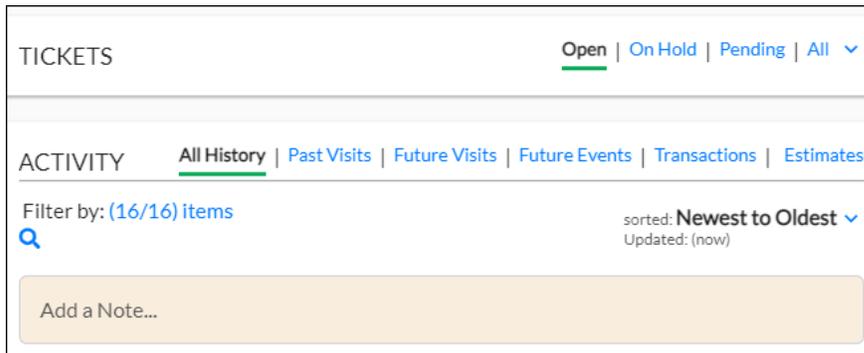
Click the paperclip icon, and the **Visit Review** screen displays notes and attachments on the right.

**Note:** Attachments added from the V3 desktop do not currently appear as described. We're working on that!

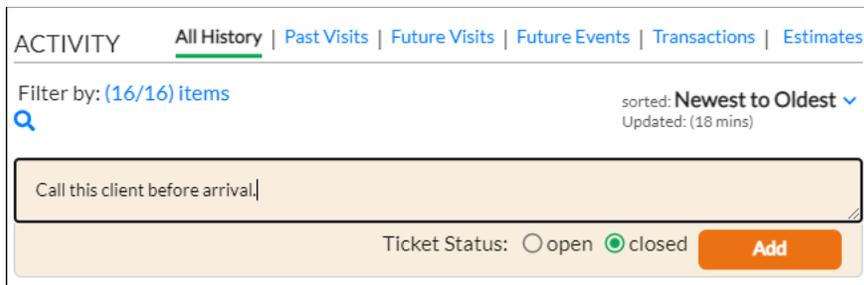
## Enhancements (Continued)

### Account Activity Stream

- At the top of the V2 and V3 **Activity Stream**, a new **Add a Note...** field lets you quickly create a **general note**.



- Enter your text into the **Add a Note...** field.

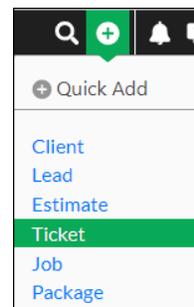


- The **Ticket Status** defaults to **closed**. Click the **open** radio button to change the status if needed.
- Click **Add**. This creates a new Ticket containing your note.

### Calendar Events

- You now can **Quick Add a Calendar Event** in V2.
  - Click the **Quick Add** icon  and select **Ticket** from the dropdown list.
  - On the **Add Ticket** overlay, click the **Event** radio button and fill in the fields.

This function was implemented in the July release for V3.

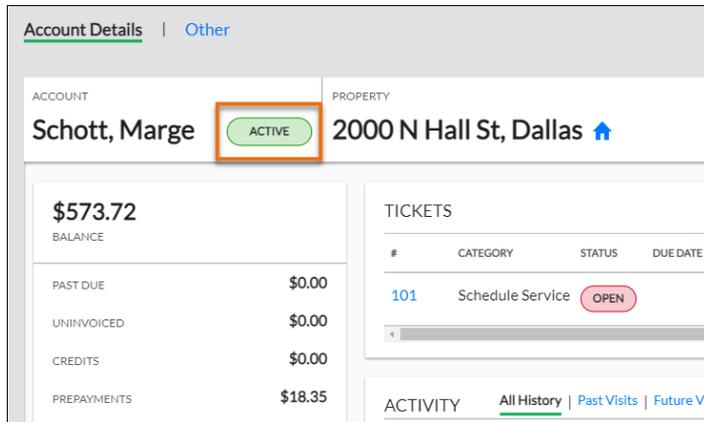


## Enhancements (Continued)

### Account Review Screen

We made various improvements to help you use the **Account Review** screen:

- The **Account Status** appears in the header of the **Account Details** screen.

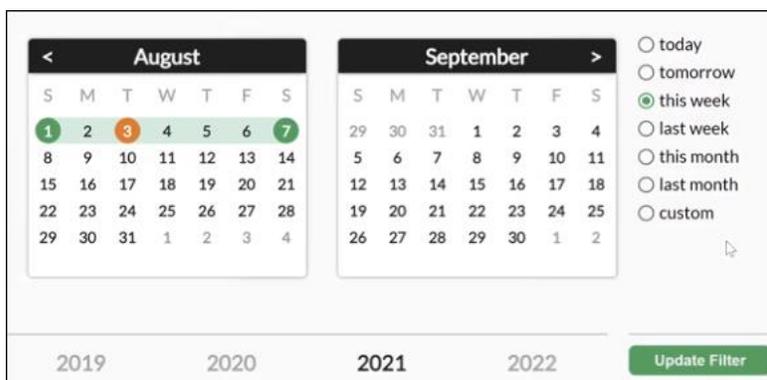


For former clients, the **Cancel Reason** appears below the Account Status.

- The **Account Balance** appears below the client name. This card also displays other amounts including **Past Due**, **Uninvoiced**, **Credits**, and **Prepayments**.
- The **Account Overview** card now displays the **Account Source**, such as Door Hanger, Google Ad, etc.

### Date Range Filter

- We updated the **Date Range filter on all screens** to allow for **Floating Date** options such as **today**, **this week**, etc. When you save one of these filters, it will remain selected when you open that screen again.



**Example:** Say you select and save the filter called **“this week”** during the week of August 1st. When you open that screen the following week, the filter will bring up data for the week of August 8th.

## Enhancements (Continued)

### Email Integration

- For Tickets created with Email Integration, the **Tickets List** now indicates when SA has **no Account or Vendor associated with an email address**. The “ACCOUNT/VENDOR NAME” column will say “No Linked Account” in this case.

You can click the Ticket to open it, then select an account from the **Account / Vendor** dropdown list. This ensures that any replies to the Ticket will be sent to the correct email address.

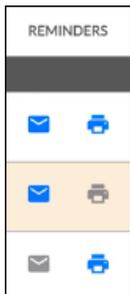
### Invoices

- In the **Invoices List**, we added a column that indicates **invoices flagged for review**. You can click to flag or unflag any invoice in the list.

All flagged invoice rows are also tinted to make them more noticeable, even if the flag column is hidden.

113 Invoices		SELECT A RECORD AND TAKE ACTION	
<input type="checkbox"/>		INVOICE #	STATUS
<b>TOTALS</b>			
<input type="checkbox"/>		711	PAST DUE
<input type="checkbox"/>		697	PAST DUE

- In the **Invoices List**, we added a “REMINDERS” column with **Email and Print icons**.



- Click the **Email** or **Print** icon to see its dialog screen.
- From there, you can quickly send the invoice. The icon then turns gray.
- Click any icon to toggle it on or off.

- In the V3 **Accounts List**, we added two filters, which are the same as in the V2 **Clients List**:  
**Estimate - Package**  
**Estimate - Service**

## Enhancements (Continued)

### Job Wizard

- To save you a step when you're creating a Package on the Job Wizard, the **Auto Renew** option is now **selected by default**.

The screenshot shows a job configuration screen for 'Round 3: Deer Spray' with dates '7/1/2021 - 12/31/2021'. The status is 'SCHEDULED' and there is an 'Exclude' button. Below this, the 'Auto-Renew Setting' dropdown menu is highlighted with an orange box and is set to 'Auto Renew'. At the bottom, there is a question 'Do you want to assign this job now?' with 'Yes' and 'No' buttons.

You can select another option from the **Auto-Renew Setting** dropdown list if needed.

- You now can add **service-specific job notes** while scheduling a job with the Job Wizard.

1. On the service line, click the note icon. 

The screenshot shows a table with columns: LINE ITEM, BUDGETED, QUANTITY, RATE, and AMOUNT. The first row is 'Aeration' with a budget of 0.25 Hours, a quantity of 1, a rate of 80.00, and an amount of 80.00. A note icon (a document with a plus sign) is highlighted with an orange box in the rightmost column. Below the table, there is a question 'Is this job a work order?' with 'Yes' and 'No' buttons.

2. A dialog opens where you can type the note.

3. Click **Add note** to add additional notes.

The screenshot shows a dialog box titled 'Aeration' with a close button (X) in the top right. It contains a text input field with a cursor, an 'Add note' link, and 'Update' and 'Cancel' buttons at the bottom.

### Leads

- On the **V2 Leads List**, the filter **Registered for Client Portal** is now available.

## Enhancements (Continued)

### Tickets

- Back by popular demand, the **Quick links for Past Due and Open Tickets** assigned to the user appear on the **My Day** page. This lets you view Tickets assigned to the current user based on their due dates.

**My Day**

My Calendar

You do not have any calendar items for today.

**My Tickets** Due Today Due This Week Past Due Open All Tickets

#190 Billing2 - Allen, Greg Due: Today

Due Today Example

**Scheduled:** 08/09/2021 @ 04:17 PM - 08/10/2021 @ 07:00 PM

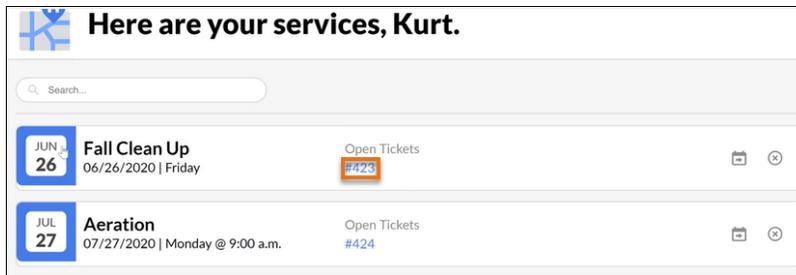
**Comment:** Test Due today

- We improved the process of **opening and closing the Tickets card**:
  - If there are no open Tickets for an account, the card defaults to closed.
  - If there are open Tickets for an account, the card defaults to open.
  - If a Ticket is closed and you select a tab, the card opens without further clicks.
- The **Tickets Activity Stream** now shows **previews of Notes, Calls, Emails, and Calendar Events**.

## Client Portal Enhancements

We improved the experience for your clients when they submit Ticket requests on visits:

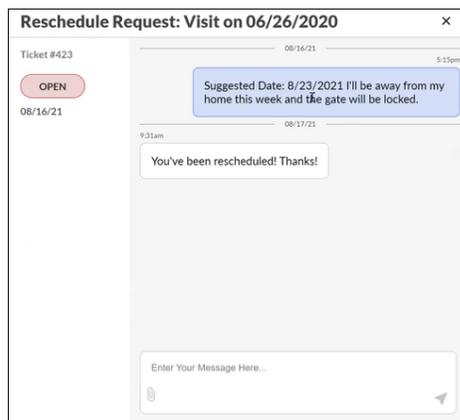
- **The Ticket number** for the visit appears on the Client Portal **Services** screen.
- Clients click the **Ticket number** to see their current correspondence.



- Clients click the **calendar icon** to request a change.



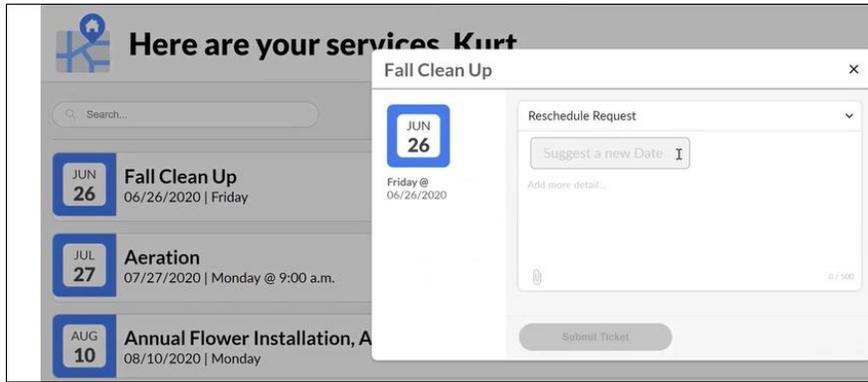
- The **Reschedule Request** overlay displays the **visit date and time** on the left. This gives the client some context about the visit for which they're submitting a request.



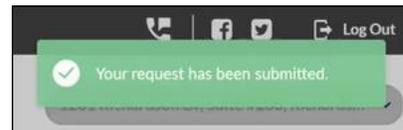
- **Tooltips** explain the client's options (such as "Reschedule Visit").

## Client Portal Enhancements (Continued)

- Clients can optionally add a **suggested date** when requesting to reschedule a visit.



- Clients get a **confirmation message** when their request is submitted successfully.



- Members see the **suggested date** at the beginning of the email about the reschedule request.
- Members can see the **related visit** on the **Ticket Review** screen for easy response.

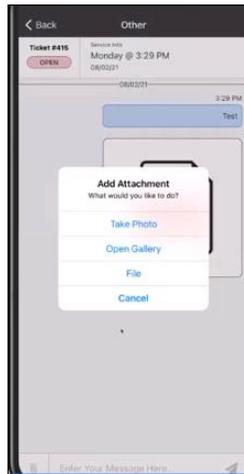
CATEGORY	TICKET #	DUE DATE
Reschedule Request	425	
<p><b>Kolbye, Kurt</b> </p> <p>1201 Richardson Dr, Richardson, TX 75080</p> <p>ASSIGNED  Joe Morgan</p> <p>STATUS <b>OPEN</b></p>		
<p>ACTIVITY <span>All   Emails   Notes   Calls   Events</span></p> <p>Search... </p> <p>Updated: (&lt; min) sorted: Newest to Oldest</p>		<p>RELATED ITEMS</p> <p>ESTIMATES (none)</p> <p>JOBS (none)</p> <p>TICKETS (none)</p> <p>VISITS <b>Fall Clean Up: 06/26/2020</b></p>
<p> Reschedule Request: Visit on 06/26/20... 08/17/2021 @ 10:10 am</p> <p>From: kurt.kolbye@serviceautopilot.com Processing   08/17/2021 @ 10:10 am</p> <p>Suggested Date: 8/27/2021 Test reschedule, I won't be at the home... <a href="#">see more</a></p>		<p>CONTACT INFO</p>

## Client Portal App Enhancements

- We added a **link code for automatic registration** with the Client Portal app on Android devices. This link is already available for iOS devices.
- The **Home Page on the Client Portal app** now shows **your company phone number**. Clients can tap the button to call you.
- On the **Tickets** screen, we adjusted the **date format**. For example, instead of "7/1/21," it now shows "07/01/21."
- Clients now have the option to **add attachments to Tickets**.

Supported formats:

**bmp doc**  
**docx gif**  
**jpg jpeg**  
**png ppt**  
**pptx svg**  
**xls xlsx**



- When clients use "**Forgot Password**" in the Client Portal app, they'll now be able to answer the same question multiple times until they get the right answer. Because everyone deserves a second chance.
- For iOS devices, we fixed an issue with the **pull-to-refresh function** on **Tickets** screens.
- For clients using the **Client Portal app to register for the Client Portal**, we made a slight update to the opt-in check boxes:
  - If the client left **Send Marketing Materials** checked during registration, it would double-opt them in, allowing improved communications.
  - If they unchecked it, this previously would affect your company's ability to send some notifications such as automated scheduling or invoicing. We've changed this option to no longer affect marketing email or text communications.

## Updates to Correct System Issues

### Client Portal

- We fixed an issue with **Guest Checkout** that allowed some clients to make payments for **more than the maximum payment** specified in **Settings**.

### Email Integration

We fixed a few issues with **adding emails to Tickets**.

- Previously, Tickets were not being created from emails sent as “Reply All.” This now works as expected.
- **Replies from iPhones were displaying the letter “y”** incorrectly in SA. Don’t ask Y; it works now.
- The **V2 Email Preview was cut off at the top** when opened from the **V2 Activity Stream**. Emails now display correctly.

### Mobile

- **Mobile attachments were not displaying** in SA if they were uploaded from a Calendar Event. This has been fixed.

### Route Sheets

- We fixed an issue in which **Route Sheets with payment coupons** weren't displaying discounts that were added to the job.

### Quick Add

- On the **Quick Add Event** screen, the **Assignment field was being skipped** when tabbing through the fields. This has been fixed.

### Sales Campaigns

- Some users had trouble viewing and printing their **Sales Campaign PDFs**. This now works as expected.

### Two Way Texting

- We fixed an issue with incoming **Text Messages not appearing in Message Center**.