

Release Notes | June 17, 2022

Bug Fixes

- There was an issue with the Payroll Report where PTO hours would sometimes not be included in an employee's total pay. This has been resolved.
- There was an issue where some Tickets did not show the associated client name if the client has been synced with QuickBooks. This has been resolved.
- For some companies, Custom Packages could not be renewed if a previous round was removed from an invoice. This has been resolved.
- For some clients, Custom Package jobs could not be canceled. This has been resolved.
- There were some instances where the "\$" was not showing up on Form C Invoice Formats. This has been resolved.
- In some instances, the client address and billing notes would be deleted incorrectly following a QuickBooks Online sync. This has been resolved.
- In certain situations, changes made to Waiting List jobs would trigger Automation sequences using the "Visit Moved to Waiting List" trigger. This has been resolved.
- There was an issue with some Contract Invoices not generating on the specified Invoice date. This has been resolved.
- There was an issue if an updated Account was clicked twice when opting out of emails, the 'Do Not Market' flag was not set correctly. This has been resolved.
- There was an issue that was preventing the "Last Invoice Number Used" from being updated, causing future numbering to be incorrect. This has been resolved.
- There was an issue that was preventing the purchase order number from updating to the next number when adding new purchase orders. This has been resolved.

Speed Improvements

We have made numerous improvements to performance across multiple areas of the system, including more Dispatch Board data optimization, global search optimization, list optimization, customer search optimization, and more:

- We made a change to how customer lists are generated.
- We made some improvements to how the V2 Invoice list is generated.
- We reduced the date range for exporting the Dispatch Board to 3 months. This should help with speed and performance across Service Autopilot, not just within the Dispatch Board.

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- We also made the Dispatch Board, Dispatch Calendar, and Waiting List exports a background process. This means that once the export is done being generated, it will appear on your My Day Page for download. Doing this should help other processes in Service Autopilot run faster.
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General Improvements

- When using "Run on Date" triggers, you will now be required to add an additional condition to the Start Trigger. This was added to prevent accidental message spam.
- We have added a Validation to ensure that Sales Tax codes are included when importing Products, Services, and Accounts.