ODT Service 365

Release Notes V8.0.0.0

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What's New

- **Added fields for Serial No., Model No., and Manufacturer Code to Quotes and Tickets**
- **Added a Customer PO field to Quotes and Tickets.**
- **Added a Salesperson Code field to Quotes and Tickets**
  Salesperson can default from the selected customer and will be transferred from Quotes to Tickets. Dimensions will also be automatically updated when a Salesperson Code is selected.
- **Added Service Cues to Customer Sales History**
- **Added the ability to view Checklists from a complete Service Ticket.**
- **Added an archive for completed Service Quotes and Planned Maintenance Quotes.**
  Service Quotes and Planned Maintenance Quotes that have been converted into tickets will be added to the archive.
- **Modifications to Service Checklists. A new page has been created for Standard Service Checklists.**
  Checklists are now created using the Standard Service Checklists page. When assigning checklists to a service template, you will now select a Checklist Code from the Standard Checklists.
- **Service Tickets can now check for open Purchase Orders.**
  An option has been added to Service Management Setup to restrict closing tickets if there is an open PO linked to that ticket.

Issues Resolved

- **Changing the Customer Card name does not update the customer name on the Service Unit Card**
  Code has been modified so that the Service Unit card will update correctly when the Customer Card name is changed.
- **Issue when linking a purchase order for non inventory items to a Service Ticket job task.**
  Issue has been resolved and no longer occurs.

Known Issues

- **Selecting the Toggle Inactive option from the Service History List causes a Permission Error.**
  Current workaround is to use the Toggle Inactive option from the Service History Card instead of the list.

UPCOMING Releases – Planned Modifications and New Features