WE ARE PLEASED TO ANNOUNCE THE RELEASE OF INVOICE TEMPLATES, OPPORTUNITY ASSESSMENT TOOL, LIVEMOBILE ENHANCEMENTS AND MUCH MORE

This Release includes a new custom Invoice editor, enhancements to the LiveMobile interface, an optional Opportunity Assessment tool and several smaller projects including:

- Variable Mileage Reimbursement Rates
- Additional “Publish To” options for Knowledgebase Articles
- Contract Status Condition for Service Desk Workflow Rules
- Purchase and Sales Order enhancements
- and much more...

THIS RELEASE IS TARGETED FOR LIMITED RELEASE SEPTEMBER 17TH, WHERE WE GATHER AND RESPOND TO CUSTOMER FEEDBACK. WE ARE THEN SCHEDULED FOR RELEASE TO AMERICA EAST OCTOBER 8TH, AND GENERAL RELEASE OCTOBER 22ND. PLEASE NOTE THAT THERE WILL BE A PARTIAL-OUTAGE DURING THIS RELEASE WHERE THE FOLLOWING PAGES IN AUTOTASK WILL BE UNAVAILABLE WHILE WE UPDATE:

- ITEMS TO INVOICE
- INVOICE HISTORY
- EXPORT HISTORY
- EXPORT WIZARD
- INVOICE NOW (FROM TICKET DETAILS)
- INVOICE CONFIGURATIONS
There will be several New Feature Webinars available from the Autotask Academy Calendar. To sign up for a session, please click here.

**INVOICE TEMPLATES**

**Invoice Configurations** have been replaced by **Invoice Templates**. These allow you to customize what information will be included and how it will appear on the invoices you send to your customers. **YOUR EXISTING INVOICE CONFIGURATIONS HAVE BEEN CONVERTED INTO INVOICE TEMPLATES.** From there, they can be edited, copied and adjusted to suit your business needs.

Invoice Templates can be accessed through **Contracts > Invoices > Templates** or via **Admin > Contracts and Billing > Invoices > Templates**. There will be 3 system templates that cannot be edited or deleted. Any template can be copied or made the default. When copying or creating a new template, a **Properties** page will display allowing you to set various preferences:

The Invoice Template will have an active, real-time preview of what the invoice will look like and allows you to navigate to the editor pages for each section. You can also generate a PDF version of your invoice. There are 5 sections of an Invoice Template that will each have a WYSIWYG HTML editor in addition to a customizable invoice body:
- **Header** – repeats on top of every page
- **Top of Invoice** – appears once at the top of the first invoice page
- **Invoice Body** – main body of invoice that includes list of billing items
- **Bottom of Invoice** – appears once at the bottom of the last invoice page
- **Footer** – repeats on the bottom of every page
- **Appendix** – appears at the end of invoice. Does *not* contain header or footer.

Each WISYWG editor is equipped with a [Variable](#) list pop-up that contains your billing and company-related information that can be inserted into your invoices. This variable list will also include user-defined fields that can contain additional tax details or identifiers that weren’t previously available on invoices. Note that the ability to insert database variables is now located in the top toolbar of the HTML editor, not to the right of the editor view (like in notification templates).
## BOTTOM OF INVOICE

This section displays once at the bottom of the invoice (think of it as your “totals” section) and contains additional configuration options for notes and tax details. You can also specify the text for Pre-paid (Block, Retainer, Per-Ticket) Contract Balances. These items are Variables that can be inserted into your templates.

### INVOICE BODY

In the Invoice Body, you can determine which columns are displayed and in which order as well as the labels of the columns themselves. **Role, Work Type** and **Hourly Billing Rate** are new column options.
You can customize the **Description** column for each Autotask billing item type and specify the order in which the item types will appear on the invoice. Each Description item will include its own HTML editor with access to the **Variable** list so that you can tailor each one to your liking (for example, you may want to include the Start/End Time of a time entry within each Labor Description).

The **Labor** description includes additional options:

- Display labor associated with Recurring Service or Fixed Price Contracts
- Specify unit of measure for the Rate/Cost column
- Choose the display text for Recurring Service, Fixed Price, Per-Ticket, Block Hour, Retainer and Non-billable labor
Recurring Services/Bundles description also includes additional options to allow you to:

- Itemize Recurring Service Contract Services/Bundles
- Display $0.00 Recurring Services/Bundles

Grouping, Sorting and Itemizing options have also been expanded. The new options added are summarized in the table below:

<table>
<thead>
<tr>
<th>GROUP BY</th>
<th>SORT BY</th>
<th>ITEMIZE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor by Contract</td>
<td>Date, then Item Type, then Item</td>
<td>Do not itemize</td>
</tr>
<tr>
<td>Labor by Project &amp; Phase</td>
<td></td>
<td>Itemize within each group</td>
</tr>
<tr>
<td>Labor by Resource</td>
<td></td>
<td>Itemize at end of invoice</td>
</tr>
</tbody>
</table>

**ADDITIONAL INVOICE FIELDS**

In Admin > Contracts and Billing > Invoices > Additional Invoice Fields, you can configure new fields that will have a corresponding variable in the Invoice Template Editor. Think of these fields as Invoice User Defined Fields, where you may want to capture supplementary information or references. For example, you may want to create a label that references the Invoice as an invoice itself or a credit note. You can configure a default value that can be overridden when processing a Batch or using the Invoice Wizard. The text you enter here will
replace wherever you the corresponding Additional Invoice Field variable was within your template:

**OTHER AREAS OF IMPACT**

The **Invoice Preview** and **Invoice History** pages have been updated to include options for generating your invoices as PDFs.
In Admin > CRM > Countries, you can assign a default Invoice Template for accounts within those areas (this will only apply when a new account is created in that country). These can be
overridden at the individual account level. This provides time savings during the configuration process and ensures consistency in your business process.

Finally, the Invoice Template has been added as a field on the Account and Contact Importer. This will allow you to bulk-assign or update the templates associated to the account.

CUSTOM INVOICES...IF YOU HAVE ONE, READ THIS

If you commissioned a custom invoice configuration that cannot be recreated with the new invoice template editor, Autotask will convert your Invoice Configuration to an Invoice Template and it will continue to be available for use. ADDITIONAL DETAILS CAN BE FOUND IN A COMMUNICATION FROM CLIENT SERVICES.

OPPORTUNITY ASSESSMENT

The Advanced Opportunity Assessment tool allows you to introduce a structured sales approach to your company by providing Assessment and Sales Process tabs to your opportunities. This enables you to keep sales reps following a consistent process as well as provide management with a detailed view of sales cycle status. Depending on your Autotask
package/contract, you may be subject to an additional fee. For complete information, please contact your Autotask account manager or Autotask directly via the contact us screen.

The Assessment Tab lists your company’s custom, pre-configured group of questions of which the answers drive the matrix seen above. These can be configured in Admin > CRM > Opportunities > Assessment Questions. Within each question, you can define:

- **Maximum Score** – number that reflects the relative importance
- **Assessment Impact** – when Technical, Relationship, both or none (see below for explanation)
- **Response Options** – provides drop-down list of answers for your questions
Following your company’s Sales Process and answering the Assessment Questions will provide instant visual feedback about the status of the opportunity (see red area above). The assessment questions evaluate two dimensions of progress: your relationship with the customer, including access to decision makers and influencers and your rapport with them, and the technical fit of your solution. As questions get answered, an overall assessment score is plotted.

Your company’s Sales Process can be defined in Admin > CRM > Opportunities > Sales Process. The Sales Process is divided into Phases and Steps, where each Step is worth a percentage of that Phase. Each Phase can be associated to an Opportunity Stage that, when marked “complete” will advance your opportunity. Within a Step, you can associate an existing Knowledgebase Article that your resources can reference during the Sales Process of the Opportunity.
CONTRACT RENEWAL

The **Renew Contract Wizard** is a new right-click option from existing Recurring Service Contracts. This performs similarly to the Copy Contract Wizard with the exception of automatically transferring all **Configuration Item** associations to the new contract on that contract’s start date. You services/bundles counts will also be preserved and the old contract will be inactivated. On the Renewal Contract Summary page, there will be a link to the previous contract as well as a date and resource stamp of when the contract was renewed.

This new capability will greatly reduce the effort to renew your important recurring revenue contracts, while preserving the reporting relationships necessary for ongoing service intelligence.
This release includes some updates to the LiveMobile UI, as well as improvements to performance of the application.

This release introduces a simplified Home page in addition to easier to read/view pages. From the Home screen, a new Ticket Search enables you to perform a partial word search on Ticket Title, Number, and Description.
To perform quick and easy functions, Autotask has added a long press (press and hold for 1-2 seconds) to any screen that shows a grid/list of data. This will allow you to easily access everyday tasks like ‘edit,’ ‘complete’ or in the some cases, adding new entities, thus reducing clicks and improving productivity.

**ADDITIONAL USABILITY ENHANCEMENTS**

**VARIABLE MILEAGE REMBURSEMENT RATE**

Autotask has added a new Expense Type of Mileage. This moves the mileage rate from Admin > Workflow Policies to Admin > Site Setup > Billing Codes > Expense Categories. This enables a user to create multiple rates for mileage reimbursement (for example, a different rate given to cars versus motorcycles). Each can then have its own Tax Category as well as General Ledger Code.

**ADDITIONAL ‘PUBLISH TO’ OPTIONS FOR KNOWLEDGEBASE ARTICLES**

Two new ‘Publish To’ options have been added to Knowledgebase Articles: Internal Users & Named Key Account Icon and Internal Users and Named Territory. Each provides the ability to publish an article to more than one account based on the set of unique characteristics.

**CONTRACT STATUS CONDITION FOR SERVICE DESK WORKFLOW RULES**

Two new Conditions have been added to the Service Desk Workflow Rule engine: Contract (with ‘Changed’ as an operator) and Is Contract Expired or Future. The purpose of these options is to enable a way to alert resources if the wrong contract is applied to a ticket or one that is expired or isn’t active yet. (i.e. A resource chooses a contract whose end date is before
today’s. This will help ensure the proper rates get applied and customers are billed appropriately.

**SPECIFY NOTIFICATION DEFAULTS FOR TICKETS**

A new **Edit Default Settings** option has been added to New/Edit Ticket, New/Edit Time Entry and Forward/Modify Ticket. This allows a user to control the default settings for who is notified and which notification template is used for each of the separate ticket items. Therefore, you can have different defaults for each of the locations above:

![Default Notification Settings - New Ticket](image)

Note that these settings apply as the default on the notification user interface within the ticket or edit screen itself, and do not impact workflow rules.

**CHANGES TO MY TIME SUMMARY AND NEW TIME OFF REQUEST SCREENS**

A few modifications have been made to the **My Time Summary** and **New Time Off Request** screens to make the information more digestible and easier to access. Your Current Time has been relabeled as **Available Balance** with links for each time bucket that displays the transactions made throughout the year. **Planned** hours have been added to the Available Balance. Planned represents the amount of time entered directly on the timesheet (approval was not required) plus the amount of time that has been approved. (but not past time). Similar changes have been added to the New Time Off Request screen.

**ADD MANUFACTURER PRODUCT NUMBER TO QUOTES**
The Manufacturer Product Number has been added to the Search By options on the Product Selector page as well as the Product Search screen. A corresponding column is now available in the Product Selector grid’s column chooser.

NEW OPTIONS FOR PURCHASE ORDERS AND SALES ORDERS

Autotask has added the ability to cancel or edit a Purchase Order after it has already been submitted or partially received. Users are now also able to add an additional item (of any type) to an existing Sales Order.

ABILITY TO EMAIL PURCHASE ORDERS

A new Email tab will allow you to configure a notification option with a predefined template (added to Admin > Notifications Templates > Inventory). This will deliver the Purchase Order to the selected recipients in PDF format. In addition, A new Print option has been added to the View Purchase Order page.

Both of these options have also been added as a right-click from the Purchase Order Search screen. The following optional columns have also been added to the Purchase Order grid’s column chooser:

- Submitted By
- Canceled By
- Emailed By
- Emailed Date

API

The following changes/additions have been made to WebServices API:

NEW ENTITIES

- InvoiceTemplate
- AdditionalInvoiceFieldValue
- PaymentTerms
- ContractTicketPurchase

FIELDS ADDED TO EXISTING ENTITIES

INVOICE
- InvoiceEditorTemplateID

**ADDITIONALINVOICEFIELDVALUE**

- InvoiceBatchID
- FieldName
- FieldValue

**PAYMENTTERMS**

- ID
- Name
- Description
- PaymentDueInDays
- Active

**QUOTEITEM**

- TaxCategoryID – now accept the value passed in. If no value is provided then ProductID, CostID, and ExpenseID will pull the value from the associated AllocationCode.

**ALLOCATIONCODE**

- Product allocation codes (type 7) have been moved to type 4. Queries on type 7 allocation codes will be re-directed to type 4. Existing integrations can continue to use type 7 codes, now mapped to type 4.

**TICKET**

- ProblemTicketID
- TicketType

**PRODUCT**

- Changes to Product allocation code (type 7)