



Service Sight

Release Notes

8.1

ServiceSight Field Service Management System - v8.1

June 8th, 2018



Notice

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OVERVIEW

Document Purpose

This document provides the bug fix & new feature information for this release of ServiceSight by Protean Software Ltd

Background

The ServiceSight system allows micro businesses to gain the benefits of using a modern, easy-to-use, field service management system to control mobile engineers, provide 360 degree visibility of their Jobs, hold a detailed database of Customers & Contacts as well as providing email Invoicing, Task & Prospect Management & interfacing with cloud-based accounting solutions.

Documentation

Further product documentation is available within the help system for ServiceSight (www.support.servicesight.com) and from the ServiceSight website (www.servicesight.com)

Licensing

ServiceSight is available via subscription licensing from Protean Software Ltd. Office users & mobile field engineers all require a licence to operate the software. Office users can use the software via a web browser on any device. Engineers using the mobile app will require an Android 5.0 device (or above), a mobile data connection & plan.

All licences are £25 per user per month. ServiceSight operates on a minimum term 12 month contract.

Supported Operating Systems & Platforms

ServiceSight (Office):

ServiceSight will run under the following web browsers on any device:

Google Chrome v32 or above

Firefox v20 or above

MS Edge

MS Internet Explorer 11

Safari v8 or above

ServiceSight (Mobile App):

ServiceSight Mobile will work on any device running the Android operating system, v5.0 (Lollipop, 2014) and above (currently latest version is v8 Oreo, 2017). The device will also need a SIM card to support mobile internet & a appropriate data plan. Consideration should also be given to a rear-facing camera if engineers might be required to capture photographs on site.

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SECTION 1 - BUG FIXES

1.01 4601 Another user has changed the data message

The message that appears to inform the user that they need to refresh their screen includes multiple square brackets [] by mistake. Message appears as [[[Data you are editing has been changed by another user. Please refresh your screen.]]]

This has now been resolved and square brackets removed.

1.02 4619 Footer Ts &Cs does not link to correct page

Users clicking on the link to the terms & conditions from the footer were taken to an incorrect web page.

This has now been resolved and the following URL is now used: <https://www.servicesight.com/wp-content/uploads/2017/06/Software-Subscription-Agreement-Online-Version-15.06.17-final-2.pdf>

1.03 4673 Resetting Password

When resetting your ServiceSight password, if the user enters the same password again the message that appears has square brackets [] around it e.g. [[[Cannot reuse old password]]]

This has been resolved and now the square brackets have been removed.

1.04 4683 Admin user can login on Android app if licence expired

If the licence count has been exceeded the admin user can still log in to the Android app.

Users now get 'licence exceeded' message instead.

1.05 4689 Job Sheet PDF cannot be opened

When emailing a job sheet the PDF will not open and causes an error message to display: "There's a problem with the file format"

This has been resolved and PDFs no longer cause the error message.

1.06 4712 Description box doesn't fit on File Upload screen

When uploading a file the 'Description' field does not fit into the confines of the upload screen.

The description box has been resized to fit the screen.

1.07 4715 Space between 'Cancellation Reasons' on job screen missing

If user cancels a job but no cancel reasons have been created then message appears: 'cancelationreason required' with no space between cancelation & reason.

This has now been resolved.

SECTION 1 - BUG FIXES

1.08 4737 Messages show as 'unread' even after reading

Even after reading an internal message the notification still showed and clicking on it revealed that the status was still 'unread'.

This has now been resolved.

1.09 4738 When moving job on planner to new engineer status not changed

When re-allocating a currently allocated job on the planner by dragging it to a new engineer the status stayed as 'allocated' until the planner is refreshed, when the correct status is displayed.

The status of the visit now shows as 'Notification Sent' as soon as the job has been moved

1.10 4785 User cannot log in—invalid default company ID in local storage

Sometimes an invalid default company ID was held in local storage in the browser and prevented users from logging in.

This has been resolved.

1.11 5035 Cannot view activities in month view on planner board

When activities are added to the planner on the day view they appear correctly. If you switch to a month view the activities disappear.

Activities now display on each view correctly.

1.12 5328 If supplied default company ID is incorrect login fails without error

It was possible to login to different single company users on the same browser.

This has been resolved.

1.13 5365 Can still edit certain fields on completed jobs

It was possible for a user to go to a completed job, go to the edit visit screen and use the arrows to amend the labour rate & overtime multiplier values. On clicking 'Save' an error was thrown: bclsJobSessionCharge.IBusinessObject_FieldValueLet - cannot change field value due to locking level: Multiplier.

The arrows have now been disabled on completed jobs.

1.14 5650 First image added to job doesn't show until second image added

Sometimes when adding images to the job on the mobile app the first image thumbnail does not appear until a second image has been added.

This has now been resolved.

SECTION 1 - BUG FIXES

1.15 5756 Error messages from JobAdd crash application

Sometimes clicking create from the new job dialog caused a crash. This was due to the dialog not being from appcompat so it causes an error when assigning a v7.alertdialog to alertdialog.

This has now been resolved.

1.16 5803 Copy permission button does not work

In Settings/Security Roles the copy button does not work correctly.

Now dialog is loaded so user can select role to copy correctly.

1.17 5859 Cannot populate 'Due Date' on Customer Record

On the customer screen the user was unable to add a value in the Due Date field or use the arrow buttons to select a value. If you saved the record first then you could add a 'Due Date' successfully.

This has been resolved.

1.18 5982 'Select Company' screen does not appear after login for multi-company

When the admin user of one company creates another company as an admin with the same email address the second company cannot be accessed.

The company choice screen now displays correctly.

1.19 6174 'Initial Rate' label on Labour Rates is confusing

On the Labour Rate screen the label 'initial rate' could be confusing to a new user as you can't tell if it means £40 for 30 mins or £40 per hour for 30 mins.

The label has now been changed to 'Initial Hourly Rate' to avoid confusion.

1.20 6178 Upgrading Template Database

When upgrading a database in the admin console the back up failed as it cannot overwrite the template that already exists.

The template back up file is upgraded when databases are upgraded.

1.21 6179 Default email address not populating on job sheets & invoices

Even if default Contacts have been populated the email address was not appearing automatically when emailing job sheets & invoices from ServiceSight. The problem was caused by tblCustomer.JobSheetContact being defaulted to 1 by the database. Needed to be 4. Also need to create db script to update field for existing customers.

This has now been resolved.

SECTION 1 - BUG FIXES

1.22 6181 Validation error on new visit dialog

When using the engineer drop down list on the new visit dialog screen would get validation error

This has now been resolved.

1.23 6182 AM/PM appearing on Job Visit screen inappropriately

In Jobs/Labour/Visit under the Charges Tab AM & PM were displaying against the unit fields.

These fields are now time pickers.

1.24 6183 'Uncomplete' job visit takes user out of edit visit screen

When you uncomplete a job visit the visit screen closed instead of enabling the screen to be edited.

The visit screen now stays open and is available for editing.

1.25 6185 Concurrency error while updating exchange rate

When updating a currency exchange rate, on saving an error was thrown saying the data has been amended by another user.

This has now been resolved.

1.26 6242 'Save & Recalculate' button not appearing every time visit gets edited

On the Job Visit screen, if the visit is edited sometimes the record is saved without giving the user the option to recalculate the charges on the visit.

This has now been resolved.

1.27 6246 Filters not working on Customer List screen

On the customer list screen the selected filter was not applied.

This has now been resolved.

1.28 6256 Adding charge on new material item

When adding new material items to a job, on the charge field the user can enter text & special characters, rather than just numerical values.

The charge field now only accepts numeric characters.

SECTION 1 - BUG FIXES

1.29 6292 Set customer.imported property on Xero export

The customer property 'imported' should be set to true on both import & export to an external accounting system. Currently this is only done for imports.

This property is now set when a customer is imported or exported.

1.30 6293 Not able to change engineer once charges are against visit

The system prevented a save if a user tried to change the engineer on a visit that had already got charges against it. Error is thrown and user cannot save changes.

User can now change engineer in this situation if needed. Charge recalculations are carried out automatically in this scenario.

1.31 6342 Google Map integration (Android)

The integration with Google Maps was broken so addresses were not appearing & map returned 'no route found'.

Google Maps integration has been reinstated.

1.32 6345 'Null' displayed on Job screen (Android)

In the jobs list a 'null' would be displayed if there were address lines missing (instead of just being blank)

This has now been resolved.

1.33 6444 Invoice status in Invoice Preview

The 'Invoice Status' section in the accordion should not appear for a preview invoice as it is not relevant.

This section no longer appears for an invoice preview.

1.34 6445 Edit jobs even when completed

The user is able to amend the charges for the job, in disabled mode, even when the job is completed but when clicked on 'save' throws an unexpected error and do not allow to save.

This has now been resolved.

1.35 6555 New security role permission not working

New security role permissions not taking effect.

This has now been resolved.

SECTION 1 - BUG FIXES

1.36 6605 Three dots appearing after am/pm (Android)

Three dots are appearing on the jobs list on the mobile app after AM or PM appears.

These have now been removed.

1.37 6618 Can't view attachments in ServiceSight

Attachments uploaded from mobile app were OK on server side but get corrupted once it reaches the UI.

Images can now be downloaded successfully.

1.38 6624 Plannerboard Not Working

Main planner board functionality was broken in 8.2

Plannerboard now working correctly

1.39 6646 User can't log in (Android)

Certain sync scenarios caused the user to not be able to log in to the mobile app.

This has now been resolved.

1.40 6758 Reminder dates & follow ups don't work outside GMT

Creating new reminders with a date outside of the timezone of the browser caused the date not to be saved properly and show a different date when viewed afterwards

This has now been resolved.

1.41 6846 Cannot create new Employees

An unexpected error was thrown when a user saved a new employee record & the authentication email was not sent to the new user.

This has now been resolved.

1.42 6850 Not displaying 'Pound Sterling' currency

When new company is created from the admin console, select 'pound sterling' from currency drop down. It does not display the currency 'Pound Sterling' in Settings/Accounting as a base currency

The user can create a company, select 'Pound Sterling' and it will be displayed in the list of created currencies.

SECTION 1 - BUG FIXES

1.43 6903 Email not found on database during sending a password recovery request

E-mail is not found on database during sending a password recovery request. On mail delivered to email there is no link to password recovery. Get message: 'Your email was not found. Please contact the system administrator.' message is displayed.

User can now recover forgotten password.

1.44 6964 Cannot send and receive videos (Android)

Syncing videos back from the mobile was causing an error message: Problem with security authentication, Server was contacted but access refused, HTTP request failed, HTTP status 500. Also problems the other way with downloading to the mobile causing a silent 500 SSL error.

The video attachment option on the Android app has been hidden. It is planned to be reinstated in a later version supporting mp4 file formats.

1.45 6971 Date & Time Due can be edited after job completion

On a completed job users can still amend the Due Date & Time.

These fields have now been locked down.

1.46 6987 Update error handling & UI message in relation to Google storage

1. When the user sends a message with attachments and tries to attach file type which is not supported he does not get a message that the attachment failed, the message is sent but the attachment link does not work
2. When the user tries to send a message with attachments and the time on his machine is in the future. The attachment fails because google storage does not allow you to upload with future date but the message is send, user is not notified that there is a problem but the attachment could not be viewed because it has not been uploaded.

Resolution:

1. When user attaches an invalid file type to message and tries to send it, he should see a message "Unsupported file type" and the message should not be sent;
2. When user attaches a file to message which fails for other reason for example with a date in the future the user should see the generic error message and and the message should not be sent;
3. When user attaches a file to a job and the file type is invalid, he should see a message "Unsupported file type" and the file should not be attached;
4. When user attaches a file to job and it fails for other reason for example with a date in the future the user should see the generic error message and file should not be attached;

SECTION 1 - BUG FIXES

1.47 7003 'Lorem Ipsum' still displayed in accordion on 'Change Password' screen

Help panel for 'Change Password' in 'My Settings' still displays Lorem Ipsum text.

This now links to <https://support.servicesight.com/knowledge-base/changepassword/> as per other help panels in system

1.48 7021 Change copyright date in footer

The copyright notice in the system footer was out of date.

This has been changed to say: ServiceSight by Protean Software © 2018 now.

1.49 7628 Default map location on Planner Map

When opening the planner module the map window defaults to the middle of the South Atlantic Ocean rather than your location or the UK as a whole.

In the absence of Depot 1 address data that can be resolved the map now opens centred on Coventry in the UK.

1.50 7788 Security Roles not listed in alphabetical order

Security roles are not sorted in alphabetical order in 'Role Performed' drop-down list.

This has now been resolved.

1.51 8123 Job Sync error when attachments included

User cannot synchronize completed jobs which contain attachments. Error: 'An error occurred on the Server. Please inform your System Administrator'.

This has now been resolved. Job should be synchronized and attachments should be visible on ServiceSight.

1.52 8380 Google Maps integration requires key

From June 11th 2018 Google are changing the way systems can interface with Google Maps. From that date all API requests require a key.

This has been implemented in v8.1 so all requests to maps and location API appear in the Google API console.

SECTION 2 - ENHANCEMENTS

2.1 Multi-Currency Support

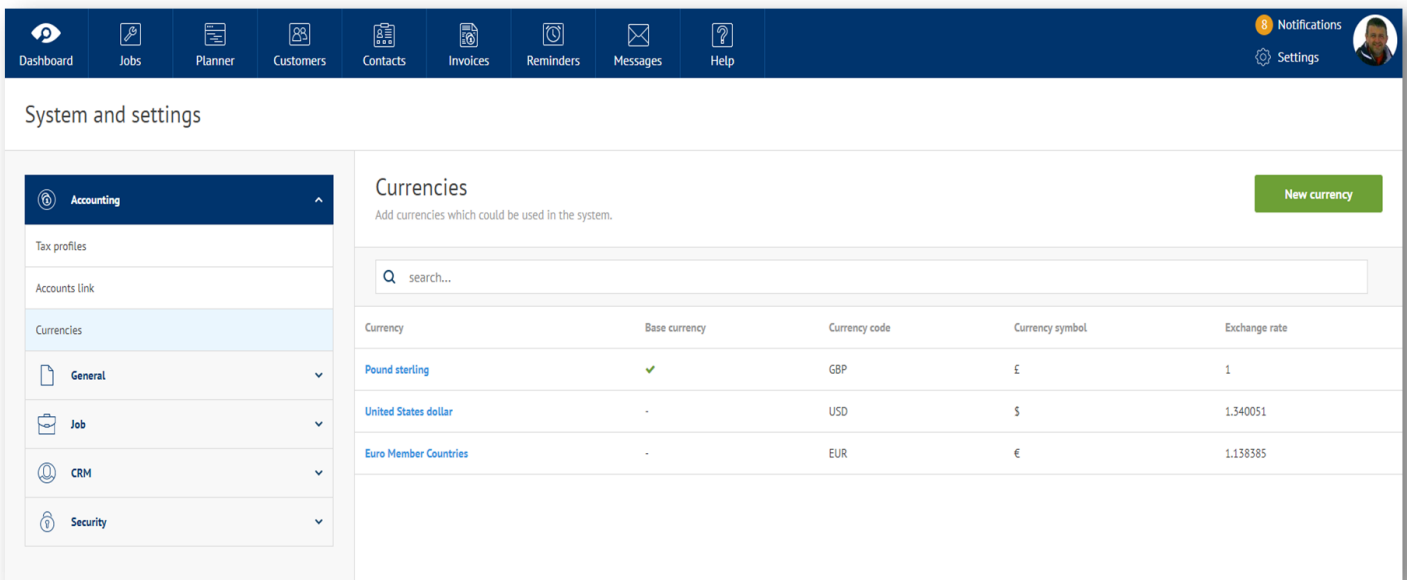
ServiceSight now supports foreign currency sales transactions for Customers. This includes:

- Ability to specify a default home or base currency
- Ability to create new currencies with symbol, name, description & exchange rate fields
- Ability to update the exchange rate with the click of a button
- Assigning currency to Customers
- Viewing sales values on Jobs in both base & customer currency
- Producing Sales Invoices in customer currency
- Multi-Currency Support & the Xero Accounts Link

2.2.1 Base Currency

Each ServiceSight company has a base or home currency selected at point of creation. The base currency is the currency of the country in which the company resides. Note that this is set in the admin console and cannot be changed by users via the UI.

You can view the base currency for a company by going to Settings / Accounting / Currencies. A list of created currencies appears and the base currency will be visually flagged (see screenshot). If the base currency is incorrect for any reason the user must contact support.



If customers have issues with the base currency as supplied on creation of their company then they should contact their account manager or the support desk.

SECTION 2 - ENHANCEMENTS

2.1 Multi-Currency Support (cont)

2.2.2 Adding New Currencies

Currency Euro Member Countries

Currency name: Euro Member Countries

Currency code: EUR

Currency symbol: €

Exchange rate: 1.138385

Update

New currencies can be added within a new menu option Settings / Accounting / Currencies. Selecting 'New currency' will open the main currency screen. Users can then select a currency from the pre-populated list of currencies in the 'Currency name' field. This list contains all the currencies currently in existence.

Once selected the code, symbol & exchange rate are populated automatically. The exchange rate is requested live via the taxjar web service.

Added currencies are then available to apply to Customers as needed.

2.2.3 Updating existing Currencies

Users can edit and update previously created currencies as needed. To update the exchange rate, for example, users can go to Settings / Accounting / Currencies and click on the currency in the list that they wish to update. Next to the exchange rate field is an update button that will request a live exchange rate from taxjar and display the new value.

2.2.4 Assigning Currency to a Customer

To assign a created currency to a Customer the user must navigate to the Customer record in question. On the Accounts Tab they simply select the appropriate currency from the drop-down list of currencies available (see screenshot below).

Customer BIED001

Name: Biedronka

Status: Active

General Accounts Sites Contacts Memo Logo History

Invoicing

Tax code: Standard Rate

Due date: Invoice date plus 0 day(s) / End of month plus 0 day(s)

Vat reg no.

Currency: Polish zloty

Euro Member Countries

Polish zloty

Pound sterling

United States dollar

SECTION 2 - ENHANCEMENTS

2.1 Multi-Currency Support (cont)

2.2.5 Viewing Job revenues in Customer currency

When carrying out jobs for customers for which a foreign currency has been selected you can view the sales prices on the job in both the currency of the customer and the base or home currency. On the Invoicing Tab the values will initially be defaulted to base currency. In the top right hand corner of the tab there is a currency toggle button. The left side will display the currency symbol of the customer and the right side will display the currency symbol of the user company. Clicking the appropriate symbol will display the sales values in that currency.

Job 100062 Awaiting Complete

Details | Labour | Materials | Invoicing | Files

Charges

Flat rate	Labour charge	Material charge	Total	Exchange rate
£ 0.00	£ 161.16	£ 75.00	£ 236.17	4.855444

Formatting options: Show invoice header detail, Show visit summary

Invoice header detail

Job 100062 Awaiting Complete

Details | Labour | Materials | Invoicing | Files

Charges

Flat rate	Labour charge	Material charge	Total	Exchange rate
zł 0.00	zł 782.55	zł 364.16	zł 1146.71	4.855444

Formatting options: Show invoice header detail, Show visit summary

Invoice header detail

Above we can see the job sales values in both Sterling (home currency) and Zloty (customer currency).

SECTION 2 - ENHANCEMENTS

2.1 Multi-Currency Support (cont)

2.2.6 Invoicing in Customer currency

Invoicing a job in the customer currency is very easy. Simply follow the normal procedure to generate a preview or actual Invoice and the invoice will be produced in the correct currency for the customer.

SUPERIOR SERVICE LTD
1130 Elliot Court, Herald Avenue, Coventry Business Park, Coventry CV5 6UB
Tel: 02476 710 303 Email: enquiries@superiorservice.co.uk

INVOICE

Customer Biedronka Wrzesinska 5 Kostrzyn	Site Biedronka Wrzesinska 5 Kostrzyn
Invoice No: 0	Order No:
Invoice Date: 18/06/2018	Account No: BIED001
Due Date: 30/06/2018	Page: 1 of 1

Description	Qty	Unit Price	Total
Your Ref: Our Ref: Job 100062			
Labour (In Hours)	4.83	zł160.23	zł774.44
Labour Initial (In Hours)	0.17	zł48.65	zł8.11
New PCB			zł364.16

Invoices will also appear in the Invoice List screen in the correct currency of the Customer to make enquiries & reporting easier.

Invoice No	Job No	Account No	Customer	Invoice Date	Due	Gross
100028	100062	BIED001	Biedronka	18/06/2018	30/06/2018	zł1,376.03

2.2.7 Multi-Currency Support & the Xero Accounts Link

The interface with Xero has been updated to support multi-currency transactions.

- Any Customers with non-base currencies in Xero will be imported into ServiceSight in the correct currency. Both Xero & ServiceSight use the ISO 4217 currency codes so they will always match up without user intervention.
- Similarly, exporting Customers to Xero should also be straight-forward and the currency will be set correctly in the accounts system.
- Sales Invoices also export to Xero in currency correctly, with the currency values displaying in Xero and nominal ledger postings remaining in base currency.

SECTION 2 - ENHANCEMENTS

2.2 Multi-Lingual Support

ServiceSight now has the ability to display all labels, fields & messages in different languages. This feature has been prepared initially for the addition of a US English translation but can be utilised for other languages in the future as translations are prepared & the market conditions dictate.

ServiceSight 8.1 does not contain any translation files and so users will not (and should not) see any difference to the UI in this version. In future languages will be able to be selected in the Admin Console at point of company creation (as per the currency and tax system). This is a massive feature in terms of the work involved but at present there are no UI changes of features to be aware of.

2.3 Internationalisation

True internationalisation (hereafter referred to as i18n) is part of 8.2—the next version of ServiceSight. However there are several elements that have gone into 8.1 to prepare the way for future releases. These items, as with multi-currency & multi-lingual functionality, are designed to allow ServiceSight to be used in other countries, time zones & markets.

The following features have been added to 8.1

- Ability to select a 'Country' on the Customer record (choice was previously limited to UK only)
- Customer 'Country' defaults from the country of the user company (Depot1)
- Validation on Post Code & Telephone Number fields (based on Customer country selected) - tested for UK, US & Ireland

2.3.1 Ability to select a 'Country' on the Customer Record

The screenshot displays the 'Customer 1' record for 'Eire Engineers Ltd'. The interface includes a navigation bar with icons for Dashboard, Jobs, Planner, Customers, Contacts, Invoices, Reminders, Messages, and Help. The main content area shows the customer's details, including Name, Status, and various address fields. The 'Country' field is highlighted with a red border, indicating the new feature.

General	Accounts	Sites	Contacts	Memo	Logo	History
Name Eire Engineers Ltd		Status Active				
Street 1 Unit 6		Street 2 Whitestown Business Park				
Town/City Dublin		County				
Postcode D24 DA24		Country Ireland				

On the Customer Creation Wizard & the main Customer record screen users can now select the Country of the Customer from a drop-down list.

SECTION 2 - ENHANCEMENTS

2.3.1 Ability to select a 'Country' on the Customer Record (cont)

Users can either scroll the list up and down - the countries appear in alphabetical order - or insert the cursor in the Country field and start typing to automatically reduce the list of choices to match the user entry.

2.3.2 Customer 'Country' defaults from the country of the user company

The home country of the user is set on company creation in the Admin Console. This data is used to create the Depot1 record. Similarly the Country on Depot1 is used as a default when adding new Customers to the database. For example if the company being created is in Ireland then this would be selected in the Admin Console. Depot1 would be created as their business address including the country of Ireland. When users create new Customers in the database the 'Country' field will default to Ireland. Users can then manually update this if needed to any other country.

2.3.3 New Validation on Post Code & Telephone Number fields

As part of the i18n feature set, ServiceSight now includes up to date validation for phone numbers & post codes for the selected customer country. Please note this has only been tested on UK, Ireland & USA but should work for any country. This means that once the country is selected on a customer (or defaulted) the system monitors the data being entered in the Phone Number & Post Code fields to ensure it is in the correct format for that selected country.

The screenshot shows the 'Customer 1' record for 'Eire Engineers Ltd'. The 'Postcode' field contains 'D24 DA24' and the 'Phone' field contains '(01) 2223 33'. Both fields are highlighted with a red border. The 'Country' field is set to 'Ireland'. A warning message 'Phone is not a valid number' is displayed at the bottom of the page.

When users enter this data the field and its contents displays as red until the correct format has been achieved. If a user tries to save a record before the post code or phone number has been entered correctly a warning message will be displayed

Phone is not a valid number

SECTION 3 - MOBILE APP ENHANCEMENTS

3.1 Android Minimum Version Updated

To enable us to take advantage of enhanced Android OS features & remain compliant with Google Play Store's requirements we have carried out the following changes to the minimum Android specification:

- Changed minimum sdk to 21
- Changed target sdk to 10
- Updated dependency versions

Please note - as a consequence of this, ServiceSight Mobile will now only work on any device running the Android operating system **v5.0 (Lollipop, 2014) and above** (currently latest version is v8 Oreo, 2017).

3.2 Multi-Lingual Support

As with the main system the ServiceSight mobile app now has the ability to display all labels, fields & messages in different languages. This feature has been prepared initially for the addition of a US English translation but can be utilised for other languages in the future as translations are prepared & the market conditions dictate.

ServiceSight 8.1 does not contain any translation files and so users will not (and should not) see any difference to the UI in this version. In future languages will be able to be selected in the Admin Console at point of company creation (as per the currency and tax system). This is a massive feature in terms of the work involved but at present there are no UI changes of features to be aware of.

3.3 Local Date/Time Support

The mobile app now picks up the date & time format settings from the device settings rather than being fixed by the app. This means that users in other countries can see the dates & times displayed in formats that make sense to them without having to set anything up in the system.



Service Sight

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