



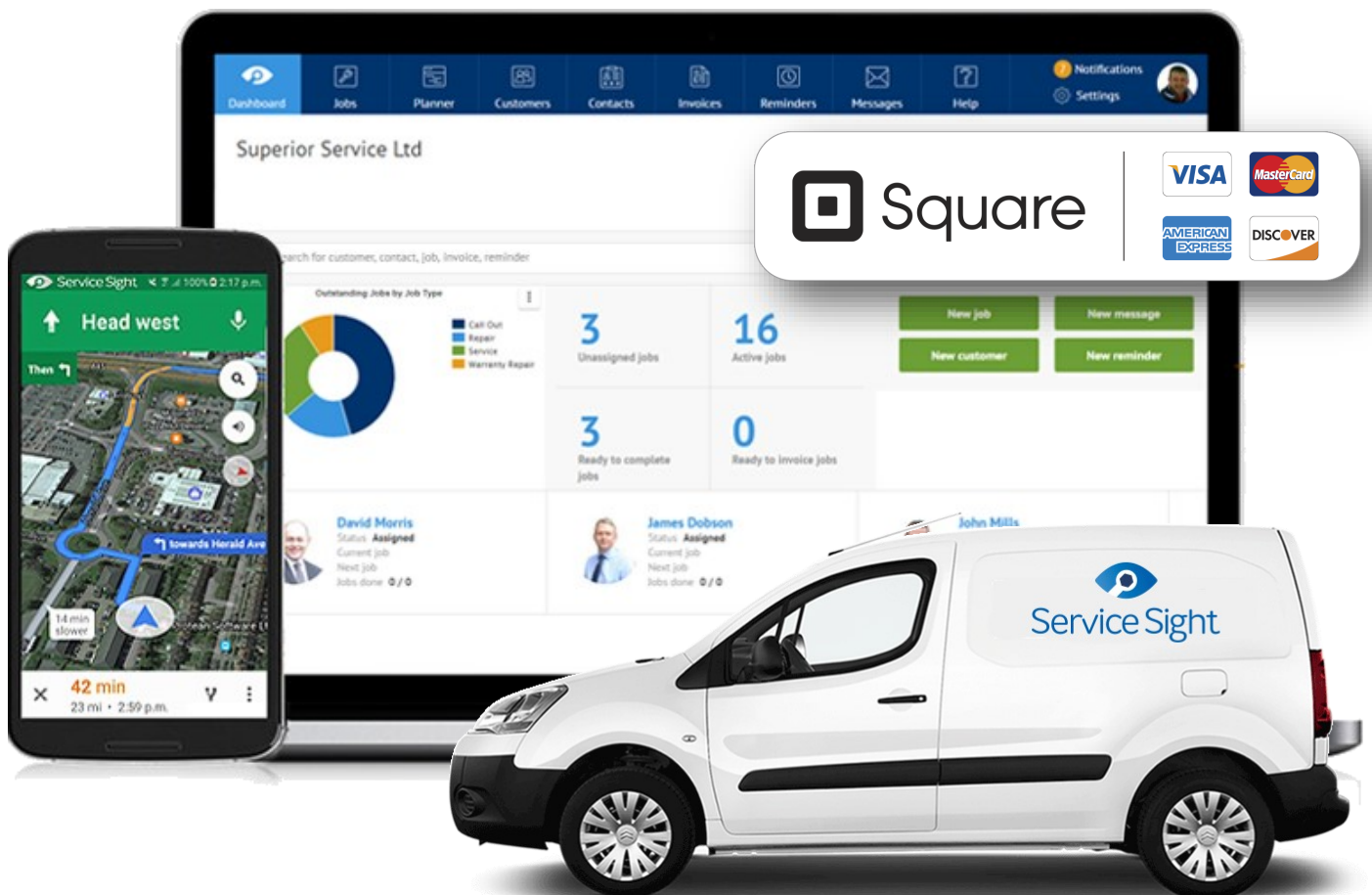
# Service Sight

## Release Notes

8.2

### ServiceSight Field Service Management System - v8.2

February 24th, 2019



#### Notice

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# OVERVIEW

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## 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](http://www.support.servicesight.com)) and from the ServiceSight website ([www.servicesight.com](http://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 £8.99 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 & an 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 - SELECTED WEB BUG FIXES

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### 1.01 5888      Once job is created, customer/site can be changed to an non-active one

Validation already existed to prevent this on job creation but now this loophole has been closed and users are prevented from changing the Customer or Site to any status other than 'Active'.

### 1.02 6176      Labour Rate Overtime Bands allow gaps & overlaps

This functionality had been missed in the initial release but has now been implemented as part of 8.2. When creating overtime bands overlaps & gaps are no longer allowed.

### 1.03 6786      Notifications snooze reminder 'drop down' disappears

When users clicked on the snooze drop-down to select a period the drop-down disappeared. This has now been resolved.

### 1.04 6972      Inaccurate pin position on map at various zoom levels

Unless the user was fully zoomed in the pin position on the maps was not accurate and would move as the user zoomed in. This has now been rectified.

### 1.05 7782      System changes units value in New Visit entry

For non-UK customers charge units were rounded up incorrectly when entering labour charge lines. This has now been resolved.

### 1.06 8833      Can't create company with a 'dot' in name

Previously users trying to create new ServiceSight companies that featured a dot (.) e.g. Ex-UK.com hit an error. This has now been resolved.

### 1.07 9257      Reminder Due is not updated when the Start Date is changed

If a user changed an existing reminders due date & time the notification time was not amended meaning it would not pop up as expected. This has now been resolved and the notification date & time is updated in line with the due date & time.

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## SECTION 1 - SELECTED WEB BUG FIXES

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### 1.08 9450 Job Visit could not be completed

If an engineer was assign to a job and then the job was completed on the web an error was thrown—arithmetic overflow. This has now been resolved.

### 1.09 9777 Non Admin user, with all permissions not able to save Labour Rates

A user, with full permission (but not the admin user) was unable to save changes to additions to Labour Rates. This has now been resolved.

### 1.10 10061 Rounding Error on Flat Charge

When some values were entered into the Flat Charge box on the Job the system rounded them unnecessarily e.g. If £547.17 was entered then the system would round it down to £547.16. This has now been resolved.

### 1.11 10247 Can't create new Job direct from Customer record

Previously users got a message that the Customer needs to be active to create a job—even if the customer was set to active already. This has now been resolved.

### 1.12 11386 Dashboard - Unable to save layout changes

There was an issue with saving user changes to the dashboard layout. This has been resolved.

### 1.13 12428 Planner Map does not show the correct time for an activity that spans midnight.

This was related to the new time zone work. If an activity was created that ran from 00:00 to 23:59 this displayed perfectly on the Planner Board but the Map would show 1:00 to 23:59 instead. This has now been resolved.

### 1.14 12442 Planner Map - Map for US company is focused on UK

Initially the map in ServiceSight focused on the centre of the UK but now if the Depot address has been populated this location is used instead. NB if the Depot is blank or the address cannot be resolved the map now centres on Chicago for US companied.

### 1.15 12490 VAT Codes tax rates cannot be edited

Users were not able to edit the tax rate against the pre-existing VAT codes that come preloaded with the system. This has now been resolved.

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## SECTION 2 - SELECTED ANDROID BUG FIXES

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### 2.01 7075      Notifications icons don't match branding

The notification icons that appeared on the mobile device when new jobs or messages were delivered, for example, were still using the Protean styling rather than ServiceSight's new look. This has been resolved now and the notification icons reflect the new look & feel of Service Sight.

### 2.02 7155      Date format in History page is different

Everywhere else in the mobile app the date format is Day Month Year (Mon March 19, 2018) but in the History section the date displayed as Day, Date Month Year (Wednesday, 28 Mar 2018). This has now been brought into line with the rest of the system.

### 2.03 9511      User not informed when UI credentials incorrect

If the user entered incorrect log in details in the mobile app a generic 'an error has occurred' message would be displayed, rather than one that explains what the problem is. This has been resolved.

### 2.0410494      Account is not locked after five attempts of entering an invalid password

It was possible to keep entering incorrect user credentials without the account being locked thus allowing the possibility of a brute force attack. This has now been resolved and after 5 tries the user account will be locked.

### 2.05 12997      Phrasebook items not showing under correct type

Phrasebook items were appearing on the mobile app under a type that was not the one it was defined for. This has now been resolved.

### 2.06 13089      Add compression to all images

It was observed that if multiple photos were added to a job it slowed down the job sync significantly. ServiceSight now compresses all images attached to the app so that the sync runs smoothly.

### 2.07 13680      When a sync is already running, trying to sync again crashes the app

Initially, running a second sync whilst one was already running caused the app to crash. This has now been resolved.

# SECTION 3 - WEB ENHANCEMENTS

## 3.1 Automatic Provisioning

Rather than requests for new free trials being handled manually by the Sales Desk, including creating a licence key, provisioning a new database and sending information to the prospect, this is now all handled automatically.

**NB** This has required a change to how ServiceSight is licenced—see section 4.4 for further details on how these changes will impact ServiceSight going forward.

The existing free trial request form on the ServiceSight website will now be replaced with a new control that will handle all of the work involved in provisioning a new user automatically.

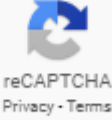
**Service Sight**

Company name  
N H P Services Ltd

Country  
UK

Your name  
Neil Plumbley

Email \* we will send an activation email to this address  
neil.plumbley@proteansoftware.co.uk

I'm not a robot   
reCAPTCHA  
Privacy - Terms

By continuing you are agreeing to our [License Agreement](#)

**Get started**

Already have an account? [login](#)

A prospect is required to enter a company name (a check is made that the company does not already exist in the ServiceSight user tables and a message is displayed to inform the user if this is the case.

Country should also be selected from a list of UK, Ireland & United States. This is important as the database created will be different based on the Country selected:

UK	UK English language, Sterling as default currency & UK Tax Rates
Ireland	English Language, Euro as default Currency & UK/Irish Tax Rates
US	US English language, US Dollars as default currency & US Sales Tax System

Then the prospect should enter their name & email Address. Note that this is the email address that will be used to send the activation email to. The format is checked on entry to make sure it is a valid email address.

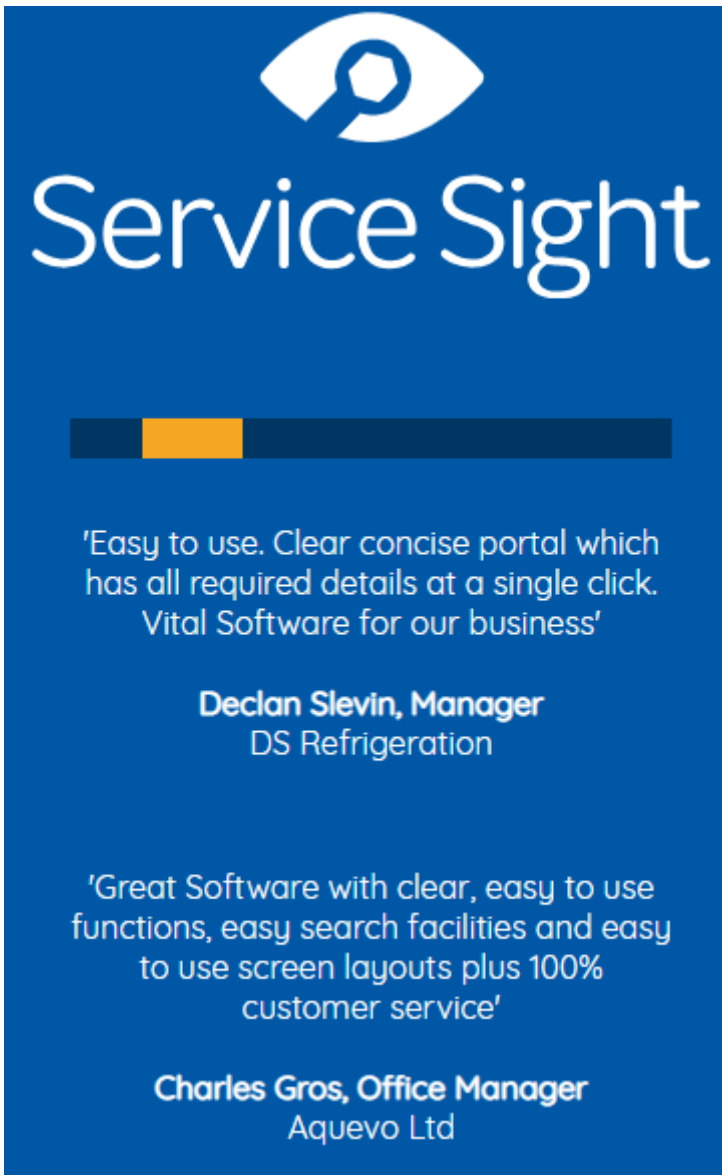
Prospects must then tick the box to prove they are a Human and then click the 'Get started' button to start the provisioning process.

Note that users can also view the licence agreement they are entering into by clicking 'Get started' if needed and also login to an existing account if they realise they have already got a company provisioned.



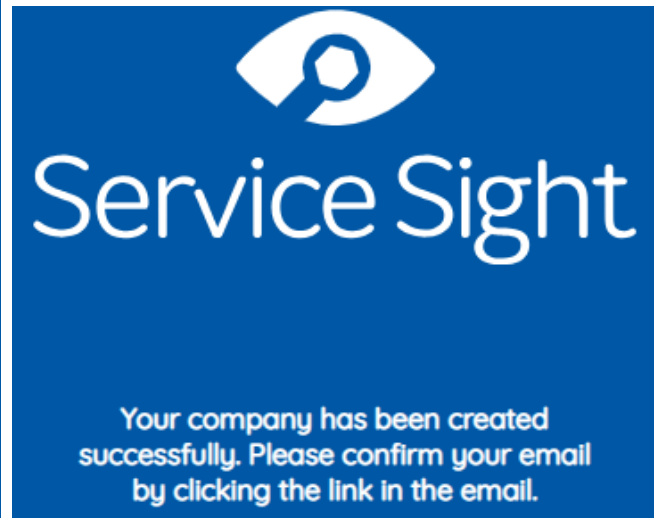
# SECTION 3 - WEB ENHANCEMENTS

## 3.1 Automatic Provisioning (cont)



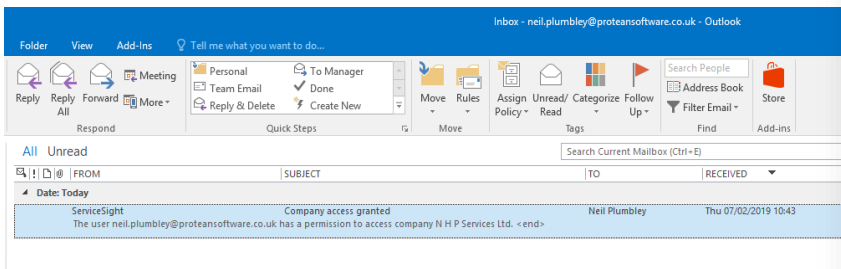
When the prospect clicks 'Get started' they are presented with a progress meter and some existing customer quotes.

The whole process takes a few seconds and then they are presented with a final screen:



Within a few seconds of receiving this successful completion message an email will arrive in the users inbox (see screenshot below).

Note that there is also a failure message if ServiceSight has encountered a problem during the provisioning process.



Select company		
Company	Status	Action
Mechanical Services	Active	<a href="#">Go to company</a>
Blank Company	Active	<a href="#">Go to company</a>
KFC Service Co	Active	<a href="#">Go to company</a>
N H P Services Ltd	Active	<a href="#">Go to company</a>
Superior Service Ltd	Active	<a href="#">Go to company</a>

In this case, because that email address already had companies linked to it, the new company was just added to the list. If it was an unused email address then the email would have been the normal welcome email that new users receive.

Note that as email is also sent to the Sales Desk to let them know a new free trial has started so they can contact them.

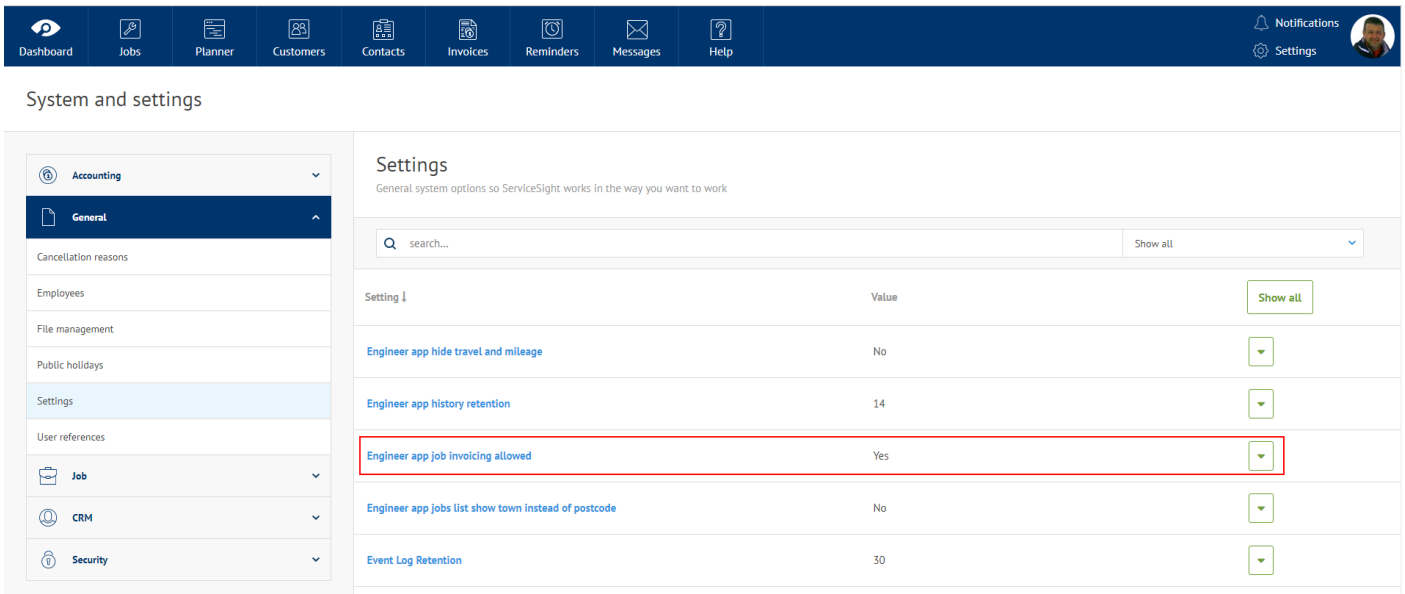
# SECTION 3 - WEB ENHANCEMENTS

## 3.2 Allowing Engineers to Raise Invoices on the Mobile App (Web)

ServiceSight enables you to allow your engineers to raise invoices via the mobile app. You also have the ability for those engineers to also collect payment by cash or credit card via the app if required. ServiceSight allows you to separate the two functions so that you can allow them to raise invoices in the field without collecting payment if you prefer.

You can configure these options in the web app.

1. Go to Settings using the option on the menu bar.
2. Then select 'General' from the menu on the left.
3. Choose 'Settings' & find the setting 'Engineering App Job Invoicing Allowed'.



The screenshot shows the ServiceSight web application interface. At the top, there is a navigation bar with icons for Dashboard, Jobs, Planner, Customers, Contacts, Invoices, Reminders, Messages, and Help. On the right side of the navigation bar, there are icons for Notifications and Settings, along with a user profile picture. Below the navigation bar, the page title is 'System and settings'. On the left side, there is a sidebar menu with categories: Accounting, General, Cancellation reasons, Employees, File management, Public holidays, Settings, User references, Job, CRM, and Security. The 'Settings' category is selected, and the 'Settings' page is displayed. The page title is 'Settings' with the subtitle 'General system options so ServiceSight works in the way you want to work'. There is a search bar and a 'Show all' dropdown. A table lists various settings with columns for 'Setting', 'Value', and a dropdown menu. The 'Engineering app job invoicing allowed' setting is highlighted with a red box, and its dropdown menu is open, showing 'Yes' selected. Other settings include 'Engineer app hide travel and mileage' (No), 'Engineer app history retention' (14), 'Engineer app jobs list show town instead of postcode' (No), and 'Event Log Retention' (30).

Setting ↓	Value	
Engineer app hide travel and mileage	No	▼
Engineer app history retention	14	▼
Engineer app job invoicing allowed	Yes	▼
Engineer app jobs list show town instead of postcode	No	▼
Event Log Retention	30	▼

4. Select 'Yes' & Save your changes.
5. The option has now been enabled. NB You will need to carry out a full sync on the mobile app to pick up this change.

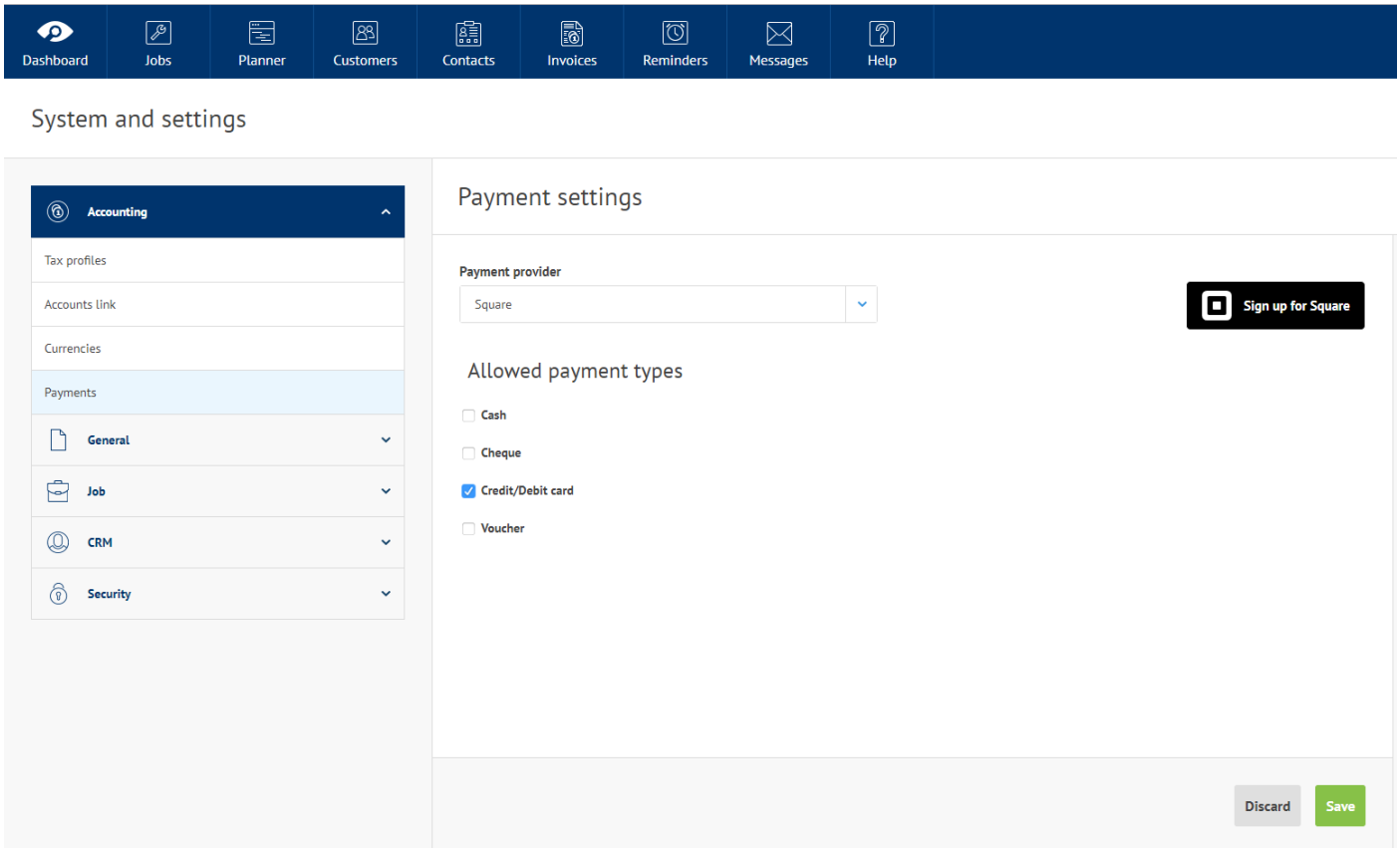
# SECTION 3 - WEB ENHANCEMENTS

## 3.3 Allowing Engineers to take Credit Card Payments (Web)

ServiceSight enables you to allow your engineers to collect payment from customers via the Square payment service. To use this feature you must also allow your engineers to raise invoices via the mobile app (see 3.2 above) and be enrolled with Square ([https://squareup.com/signup/gb?lang\\_code=en-GB](https://squareup.com/signup/gb?lang_code=en-GB)) and have the Square mobile app installed on the engineers' mobile devices.

You can configure these options in the web app. To enable payment collection:

1. Go to Settings using the option on the menu bar.
2. Then select 'Accounting' from the menu on the left.
3. Choose 'Payments'.
4. Select the payment provider. This will be 'Square'.
5. Select which payment types you wish to enable for the engineers. You must choose at least one. Save your changes.



NB You will notice that there is a link to the Square sign-up page available if you do not already have a Square account.

When you save your changes the system automatically enables the 'Collect payment' flag on every Customer record. If you do not want to collect payments from certain customers then you can disable this flag on the relevant Customer record screen (see screenshot below).

# SECTION 3 - WEB ENHANCEMENTS

## 3.3 Allowing Engineers to take Credit Card Payments (Web) (Cont.)

Dashboard Jobs Planner Customers Contacts Invoices Reminders Messages Help

Customer ABC001

**ABC** Name: ABC Machine Tools Ltd Status: Active

General Accounts Sites Contacts Memo Logo History

**Invoicing**

Tax code: Standard Currency: Pound sterling

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

Invoice email address: chris.morgan@abc.co.uk

Vat reg no.: 12345678

Collect payment

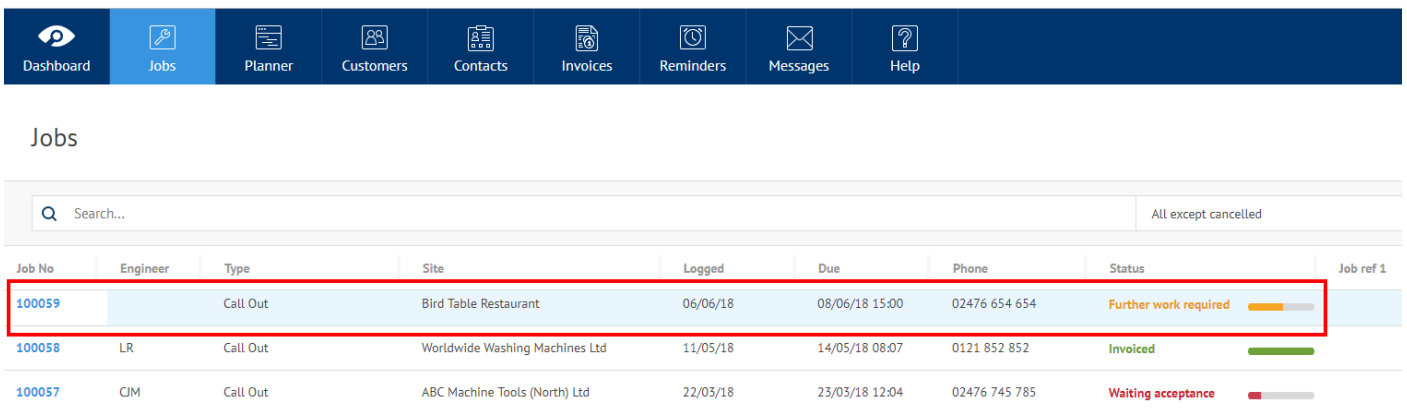
# SECTION 3 - WEB ENHANCEMENTS

## 3.4 Job Process Improvements

Following feedback from customers & focus groups we wanted to make the process of recognising & dealing with further work found by engineers on site as easy as possible. Previously, users would see jobs coming back in with a status of Further Work Required without knowing what that meant or what to do about it and the actual text entered by the engineer on site was hidden away inside the labour visit with no indication of how to get to it.

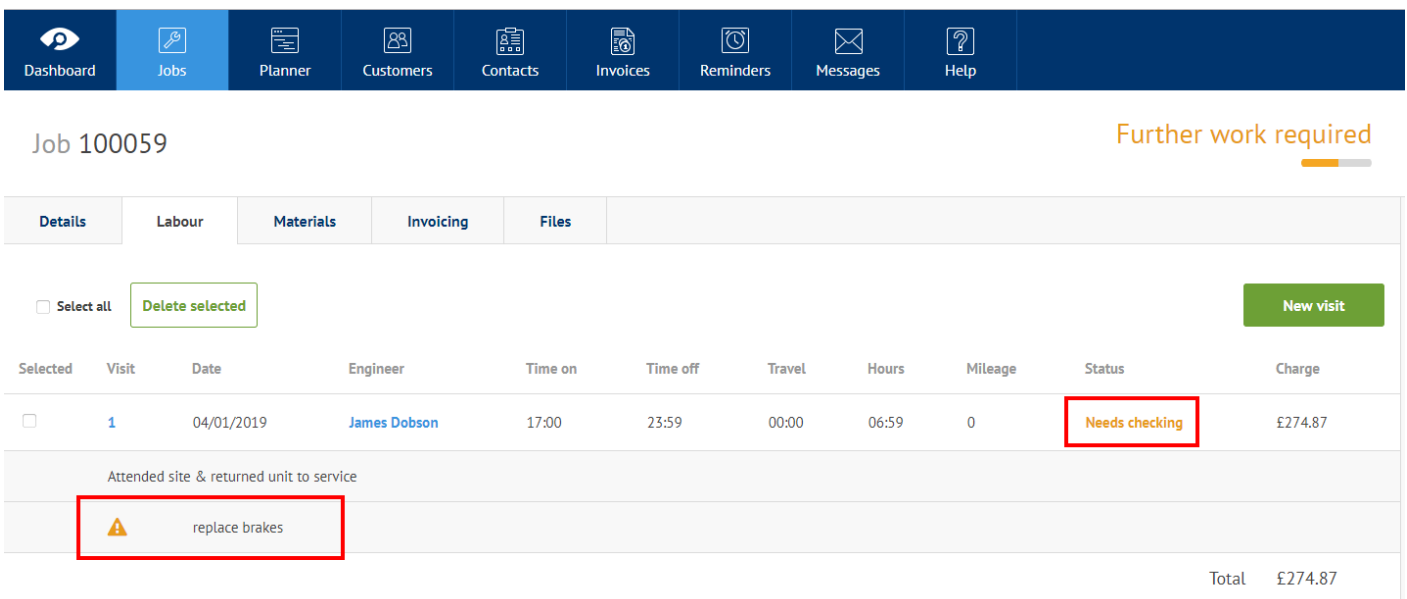
### 3.4.1 New Further Work Required Process

1. Complete the job on the mobile app as normal, populating the Further Work Required section of the Job completion screen with the work required & any materials needed. On sign off the job is refreshed back to the web app and the job status is updated to 'Further work required'.



Job No	Engineer	Type	Site	Logged	Due	Phone	Status	Job ref 1
100059		Call Out	Bird Table Restaurant	06/06/18	08/06/18 15:00	02476 654 654	Further work required	
100058	LR	Call Out	Worldwide Washing Machines Ltd	11/05/18	14/05/18 08:07	0121 852 852	Invoiced	
100057	CJM	Call Out	ABC Machine Tools (North) Ltd	22/05/18	23/05/18 12:04	02476 745 785	Waiting acceptance	

H2. For any job with a status of 'Further work required' when you click on it, to open it, the job immediately opens the labour summary tab so users can see the further work that has been identified.



Details	Labour	Materials	Invoicing	Files							
<input type="checkbox"/> Select all <span>Delete selected</span> <span>New visit</span>											
Selected	Visit	Date	Engineer	Time on	Time off	Travel	Hours	Mileage	Status	Charge	
<input type="checkbox"/>	1	04/01/2019	James Dobson	17:00	23:59	00:00	06:59	0	Needs checking	£274.87	
Attended site & returned unit to service											
<span>replace brakes</span>											
										Total	£274.87

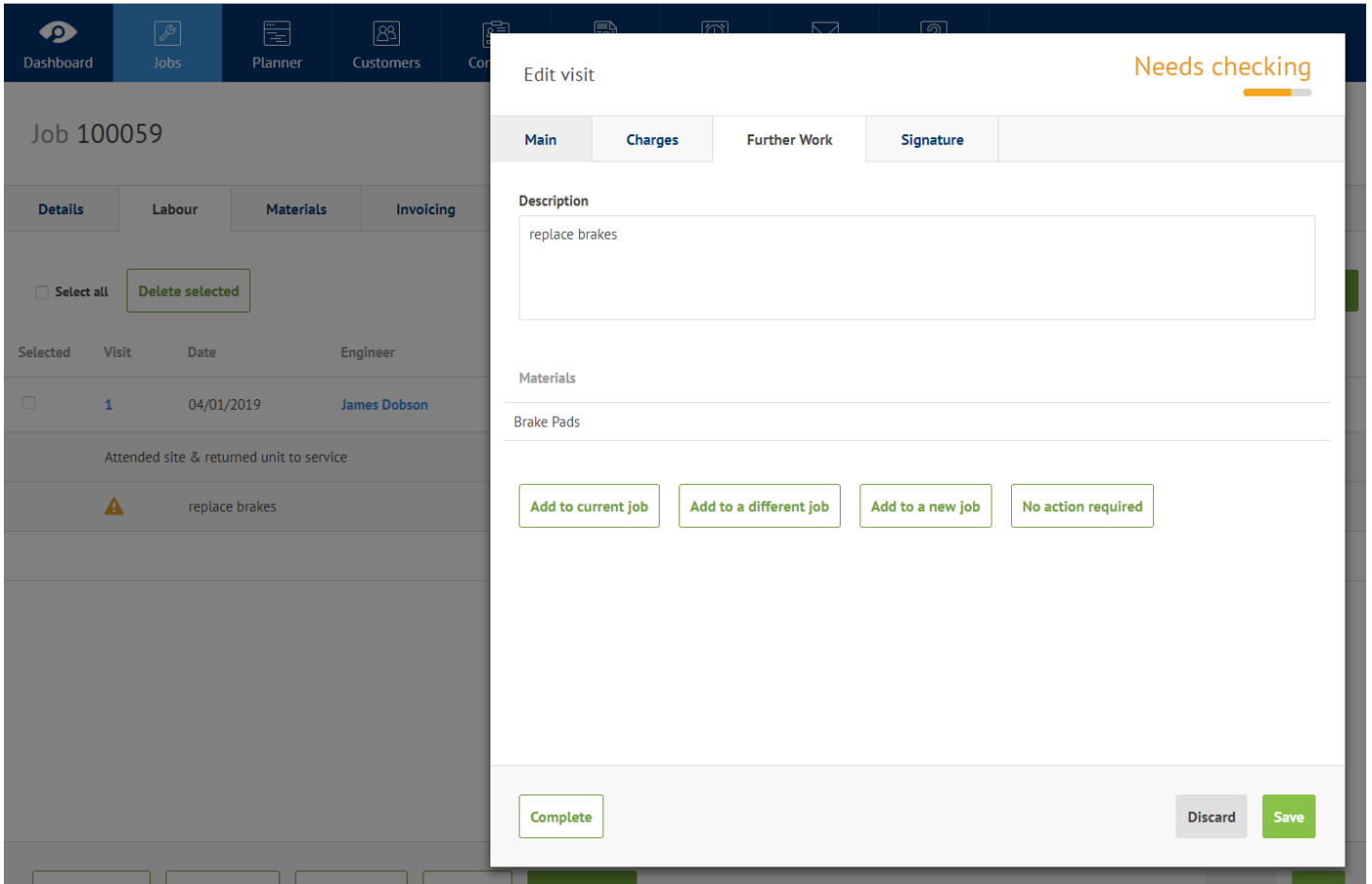
Here we can see that status of the labour visit is 'Needs checking', highlighting the fact that there is something that needs to be done before this visit can be fully completed and the further work description is shown under the visit report with a yellow

# SECTION 3 - WEB ENHANCEMENTS

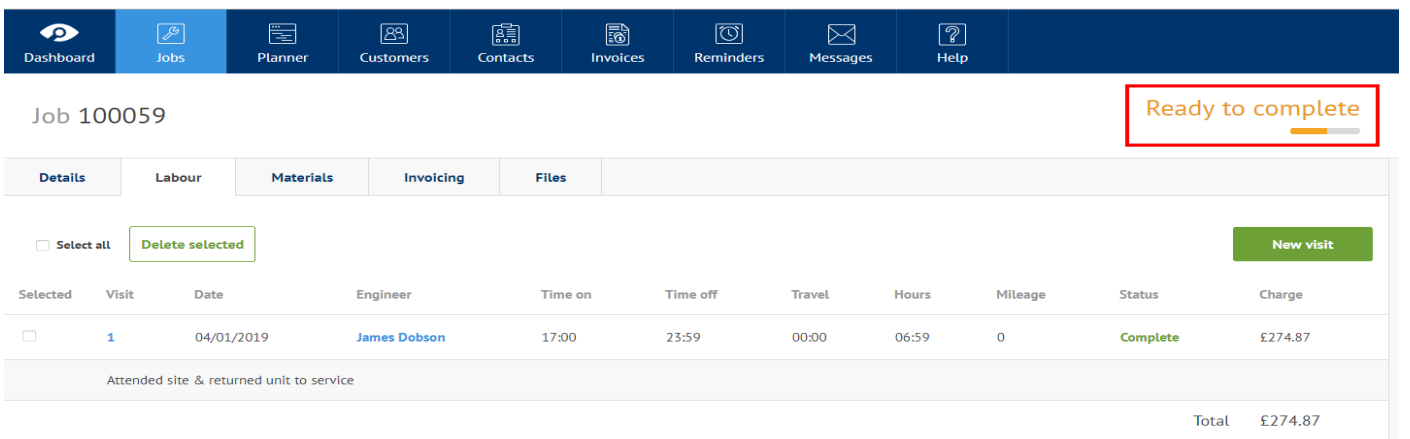
## 3.4.1 New Further Work Required Process (cont)

warning triangle next to it.

3. The user should then click on the visit number to open the visit and see the further work details and determine what action should be taken.



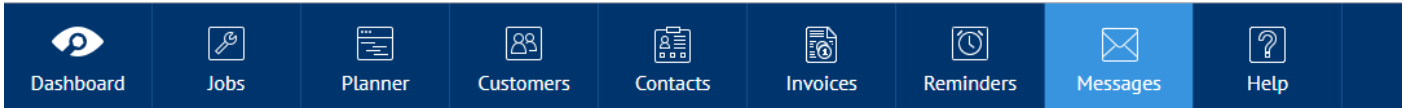
4. In the visit the user can check the details & materials and decide how to proceed by choosing one of the options below - add to current job; add to different job; add to new job or no action required. Once a decision has been made the visit will close automatically and the visit & job statuses are updated. The job will now have a status of 'Ready to complete'.




# SECTION 3 - WEB ENHANCEMENTS

## 3.4.1 New Further Work Required Process (cont)


**NB** Users will also receive an automatic message, with a notification, when jobs returning from the mobile app are not ready for completion for various reasons. This message let's the job controller know that the job needs to be looked at and contains a link to the job. This is used to avoid Further Work jobs being missed in the office.




### Message James Dobson cannot complete the visit on Job 100059




James Dobson  
15/02/2019 14:57  
James Dobson cannot complete the visit o...



15/02/2019 14:57 

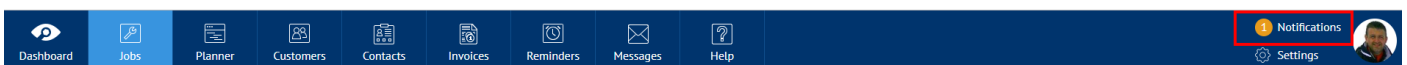
You will need to check the job to see what has caused this problem

 [Job 100059](#)

## 3.4.2 Job Completion & Invoicing Improvements

ServiceSight 8.2 sets out to improve the usability of the system and the feedback given to users as events occur around the system. Previously some Job statuses did not give good feedback to the user or guide them into what to do next. Jobs would come back from the engineer's mobile devices but office users would not realise what they needed to do to complete & invoice them. On 8.2 the system is much more proactive.

1. When a job is completed on the mobile app, in this case Job 100050, if there are no problems with the visit and there is no further work identified the job status updates to 'Ready to Complete' to indicate to the user that they can now go ahead and complete this job.
2. As well as this, an automatic message is created, with a notification, to let the job controller know that the job has been done and can now be completed.




Jobs New job

Search... All except cancelled Search Save Reset


Job No	Engineer	Type	Site	Logged	Due	Phone	Status	Job ref 1	Job ref 2
100050		Warranty Repair	Alpha-Omega Trading	02/05/18		0121 654 654	Ready to complete		
100049	JE	Repair	Whites Wines	13/03/18		0121 753 753	Invoiced		




### Message James Dobson has completed work at Alpha-Omega Trading




James Dobson  
15/02/2019 15:34  
James Dobson has completed work at Alpha...



15/02/2019 15:34 

James Dobson has completed some work on job 100050 at Alpha-Omega Trading on 15/02/2019 15:33:30. Click on the link to view the job.

 [Job 100050](#)

# SECTION 3 - WEB ENHANCEMENTS

## 3.4.2 Job Completion & Invoicing Improvements (cont.)

3. When the user completes the job the job status updates to 'Ready to invoice', again to make it clear to the user what the next step is.

The screenshot displays a software interface for job management. At the top, a dark blue navigation bar contains icons and labels for Dashboard, Jobs, Planner, Customers, Contacts, Invoices, Reminders, Messages, and Help. Below this, the main content area shows 'Job 100050' with a 'Ready to invoice' status indicator in a red-bordered box. A horizontal menu below the job title includes 'Details', 'Labour', 'Materials', 'Invoicing', and 'Files'. The 'Invoicing' section is active, showing a 'Charges' table with columns for Flat rate, Labour charge, Material charge, and Total. The table contains the following data:

Flat rate	Labour charge	Material charge	Total
£ 100.00	£ 29.17	£ 0.00	£ 129.17

Below the charges table, there are two panels. The left panel, 'Formatting options', includes checkboxes for 'Show invoice header detail', 'Show visit summary', 'Show visit reports', 'Show combined labour rates', 'Summarise', and 'Combine travel'. The right panel, 'Invoice header detail', contains a large empty text box and an 'Order No' field with the value '2212333'. At the bottom, the 'Invoice options' section features two buttons: 'Preview invoice' and 'Invoice job'.



# SECTION 3 - WEB ENHANCEMENTS

## 3.5 General Improvements

### 3.5.1 Job Types 'Creates Invoice' Flag

To aid clarity the invoice options associated with a Job type e.g. 'Creates invoice'; 'Show invoice header detail' and so on have now been moved from the 'Nominal accounts' tab to the 'General' tab, on the front of the Job Type.

### Job type Call Out

- General
- Charges**
- Nominal accounts

**Name**  
Call Out

**Category**  
Call Out

**Description**  
Breakdown

**Invoice settings**

Creates invoices

**Invoice options**

Show invoice header detail

Show visit summary

Show visit reports

Show combined labour rates

Delete Discard Save

### 3.5.2 VAT Number Validation

To facilitate the recording of VAT registration numbers for user's customers from outside the UK, all of the validation has been removed from this field on the Accounts tab of the Customer record. The system will now accept any combination of letters, numbers & special characters in this field.

For example, in Ireland VAT numbers consist of 8 or 9 characters with the last (or last two being letters) whilst in France they are 11 characters with the first, second or third character being a letter.

## SECTION 3 - WEB ENHANCEMENTS

### 3.5 General Improvements (cont)

#### 3.5.3 Engineer Carousel Improvement

A small improvement has been made to the Engineer carousel on the Dashboard to aid user understanding & experience.

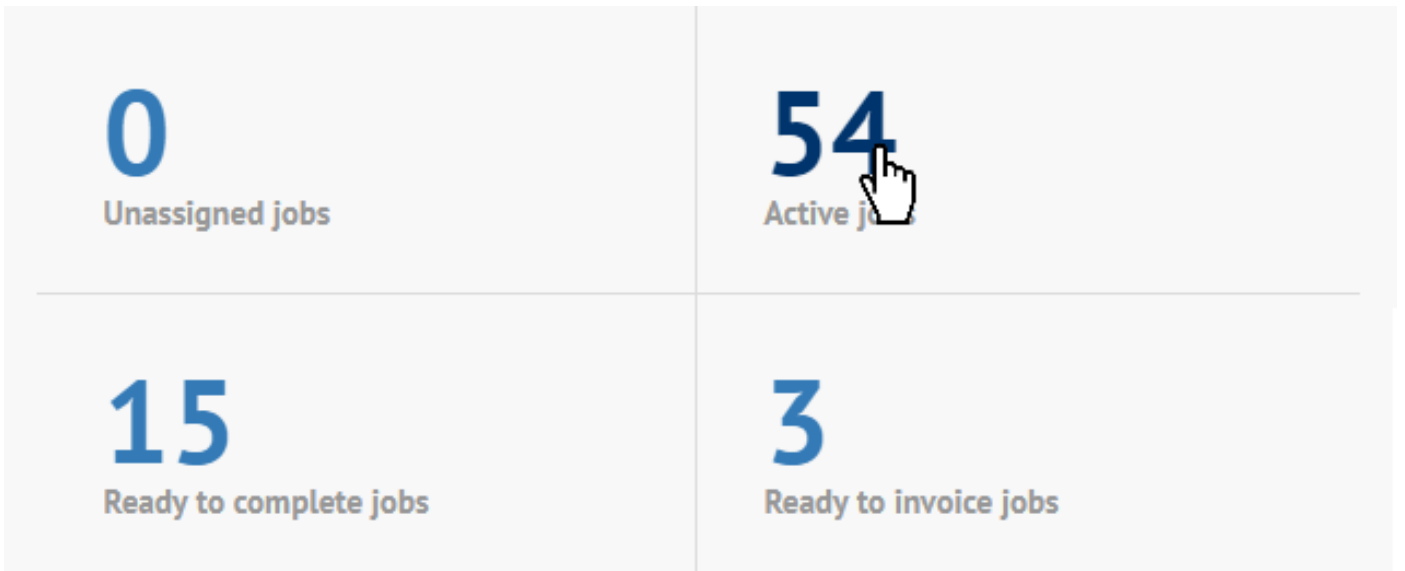
The items that are links ie the Engineer name & the Site names of the current and last jobs are now formatted like other links in ServiceSight and change colour when the mouse passes over them and the mouse pointer changes to a hand to indicate that they are links.



#### 3.5.4 OS Job Widget Improvement

A small improvement has been made to the OS Job widget on the Dashboard to aid user understanding & experience.

The four values - unassigned, active, ready to complete & ready to invoice jobs - that are links are now formatted to change colour when the mouse passes over them and the mouse pointer changes to a hand to indicate that they are links and can be interacted with.

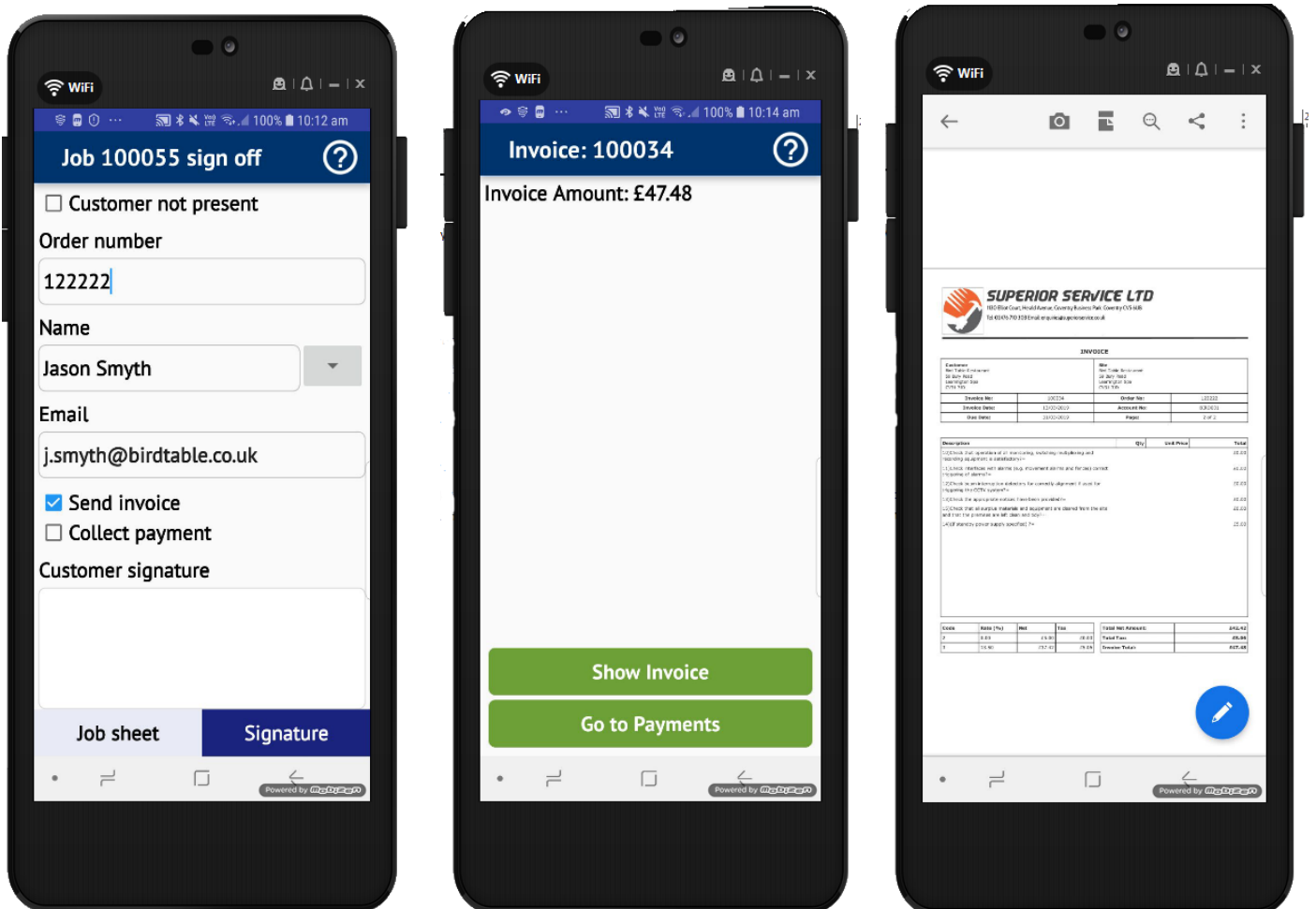


# SECTION 4 - MOBILE APP ENHANCEMENTS

## 4.1 Invoicing on the Mobile App

To enable this feature which allows your engineers to raise job invoices directly on the mobile app you first need to turn it on in the web app - see Section 3.2 above

1. When the job is complete, go to 'Sign Off' as normal.
2. The job sheet appears for checking.
3. Click onto the 'Signature' tab and enter an Order No if required & choose the 'Customer Name'.
4. The 'Email Address' field will auto-populate if a Contact with an Email Address has been selected. If not, one can be manually entered. This is important as a copy of the Invoice will be sent to this email address.
5. The 'Invoice' check box should be ticked automatically but can be turned on & off here also. You will also notice a 'Collect Payment' flag (see below for details).
6. Collect the Customer Signature & Engineer Signature as normal & tap the 'Complete' button.
7. The job is completed in the web app & the invoice raised. These details are then passed back to the mobile app. The engineer will be shown the Invoice No & the Total Invoice Value. Users also have the opportunity to display the invoice on screen and/or 'Go to Payments' (if this option has been enabled).

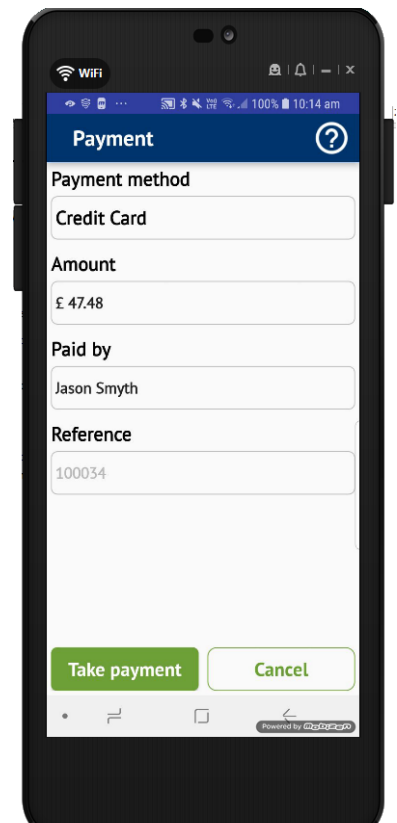
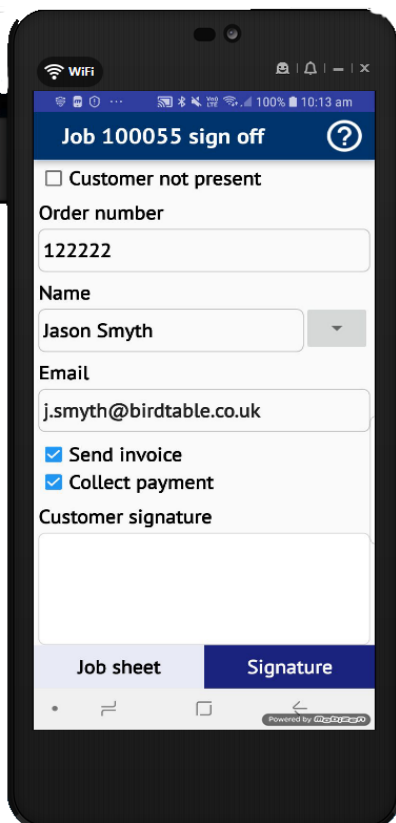


# SECTION 4 - MOBILE APP ENHANCEMENTS

## 4.2 Collecting Payments on the Mobile App

To enable this feature which allows your engineers to collect payments directly on the mobile app you first need to turn it on in the web app & allow your engineers to raise invoices - see Section 3.2 & 3.3 above. You will also need to have a Square account & the Square App installed on the Engineers' mobile devices

1. When the job is complete, go to 'Sign Off' as normal.
2. The job sheet appears for checking.
3. Click onto the 'Signature' tab and enter an Order No if required & choose the 'Customer Name'.
4. The 'Email Address' field will auto-populate if a Contact with an Email Address has been selected. If not, one can be manually entered. This is important as a copy of the Invoice will be sent to this email address.
5. The 'Invoice' check box should be ticked automatically but can be turned on & off here also. You will also notice a 'Collect Payment' flag (see below for details).
6. Collect the Customer Signature & Engineer Signature as normal & tap the 'Complete' button.
7. The job is completed in the web app & the invoice raised. These details are then passed back to the mobile app. The engineer will be shown the Invoice No & the Total Invoice Value. Users also have the opportunity to display the invoice on screen and/or 'Go to Payments'
8. Select 'Go to payments'
9. Choose your payment method. The 'Amount' & 'Paid By' fields are auto-populated.
10. Select 'Take Payment'.
11. The Square App opens automatically where the payment is processed. Receipts can be sent via email or text.





# Service Sight

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