Service Sight

Release Notes 8.3

ServiceSight Field Service Management System - v8.3

June 14th, 2019

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 £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 v9 Pie, 2018). 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 - WEB BUG FIXES

1.01 12696 It is possible to run synchronisation if synchronisation is already in progress

A ‘Sync status’ setting has been added to avoid multiple users running the accounts sync at the same time.

1.02 15070 'Sync Status' setting description is not properly formatted

This should have been a hidden setting and this has been rectified in 8.3

1.03 15376 Update country alias table

To enable the system to validate countries more easily further variations of United States of America have been added to the countries table including USA & U.S.A

1.04 15377 Xero - Customer import (US customers)

Initially there was an issue with importing US customers from Xero UK. This has now been resolved.

1.05 15451 Multi SQL server support

Resolved

1.06 15729 Spinner is not properly displayed

Previously the spinner was displaying in the same line as the text of the message. This has now been resolved.

1.07 15896 Sites duplications - for newly created customer

When adding a new site to a customer record it was possible for a user to double-click the Save button and create duplicate site records. This has now been resolved.

1.08 16147 Setting 'Invoice number' - wrong message (if invoice number is not valid)

If a users entered an inappropriate value (e.g. 100a011) in the setting for the next Invoice number the message shown was misleading ‘invoice number cannot be less than 1’. This has now been resolved.

1.09 16231 Customer Import - ContactEmail and Email is not valid (empty string)

Previously you could not import a customer record if the email was blank. This has been resolved.

SECTION 1 - WEB BUG FIXES

1.10 17933 Unexpected error on 'Save and recalculate' of a visit.

Errors were generated intermittently when recalculating labour charges on visits for non-mobile engineers. This has now been resolved.

1.11 18237 Planner board - UI title displaying incorrectly

The list of Job Categories was appearing in the wrong place on the planer map, often appearing over the top of the field label. This has now been resolved.

1.12 18238 Buttons are disabled if validation fails

When adding new customers the ‘Discard’ & ‘Save’ buttons were being disabled if the validation failed on the account code. This has now been resolved.

1.13 18350 Xero sync fails if xero customer has no invoice due date set

If a customer on Xero UK had no value for ‘invoice due date’ then it would not be imported into ServiceSight but throw an error instead. This has now been resolved.

SECTION 2 - ANDROID BUG FIXES

2.01 13357 Date & time - Activities and jobs on job list are not properly sorted

Previously, the activates & jobs on the job list were not properly sorted. This has now been resolved.

2.02 13304 Opening datetime picker crashes app

When accessing the date-time picker when completing a job on the mobile app, the app would crash. This has now been resolved.

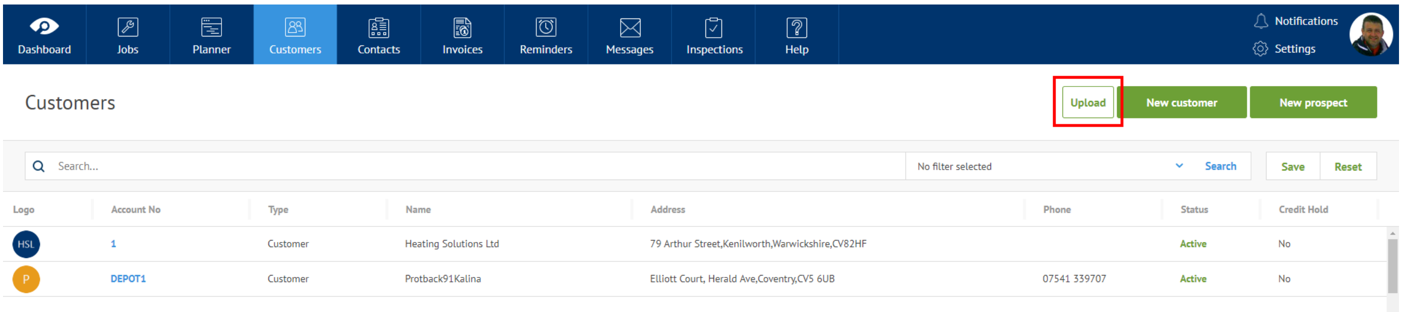
SECTION 3 - WEB ENHANCEMENTS

3.1 Customer Upload

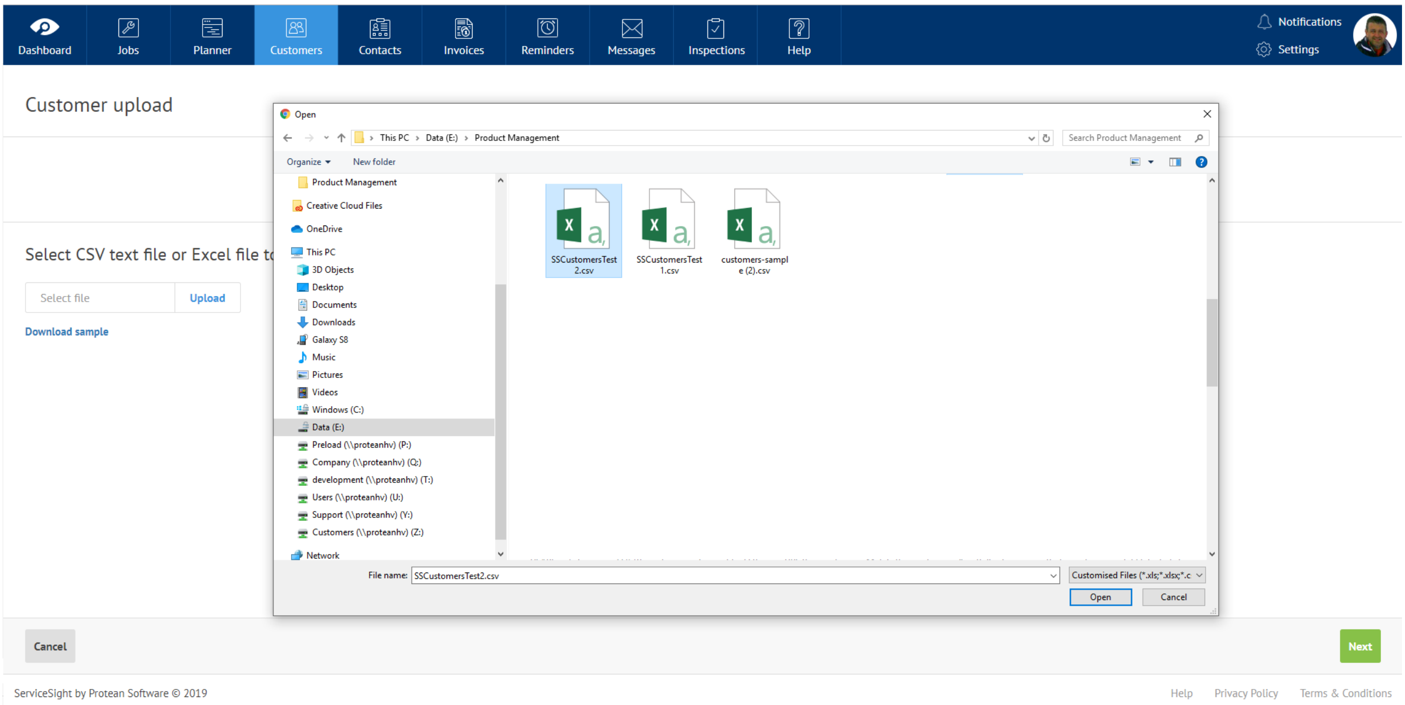
To help non-accounts users get their customers into ServiceSight quickly & efficiently we have added a Customer upload feature. This allows users to import customer records from CSV files or Excel spreadsheets. These can be files created by hand or output from other systems, such as Sage 50c. The Customer upload also updates existing customers (matching on account code) as well as adding new ones.

3.1.1 Selecting the file

To access the upload feature simply click the ‘Customers’ icon on the menu bar. The list of Customers opens. The Upload button is in the top right next to the ‘New customer’ & ‘New prospect’ buttons.



Clicking the ‘Upload’ button opens the first stage of the upload process - selecting the file to upload. Users can choose an existing CSV (comma separated) or Excel spreadsheet by clicking ‘Select file’. A browse window opens for the user to select the file.



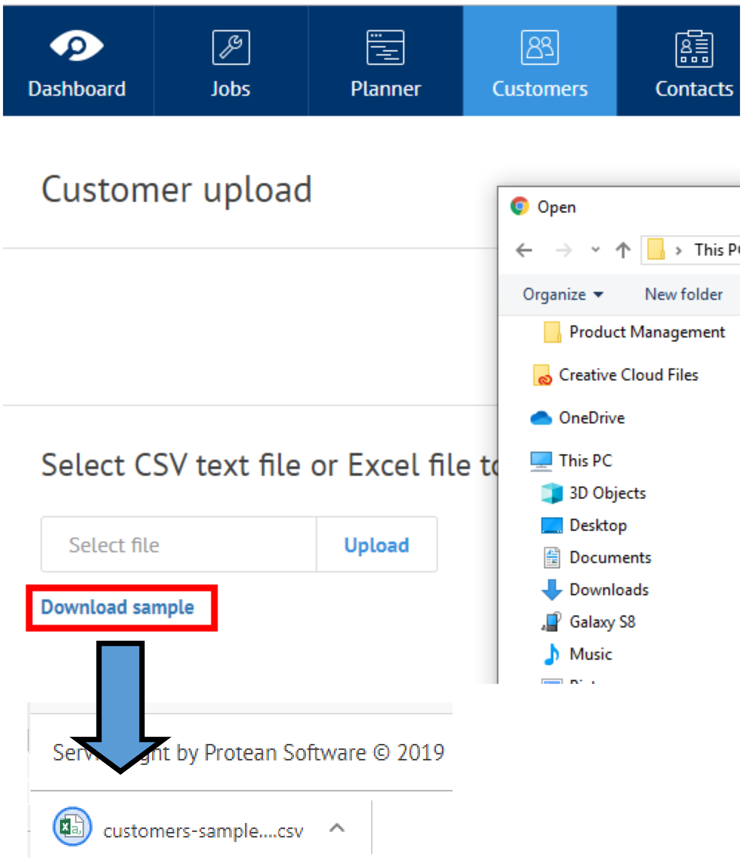
When the user selects the file the system will check to see if it is a recognised format ie ServiceSight, Sage 50 or Quickbooks. In these cases the user is informed and the field mapping stage is completed automatically although the user can still manually amend these mappings if needed.

SECTION 3 - WEB ENHANCEMENTS

3.1 Customer Upload (cont)

3.1.2 Downloading a Sample File

If users do not have a file containing their customer records they can download a pre-made file to populate by using the ‘Download sample’ link on this screen. This will add a CSV file to the users usual download folder that can be opened in Excel.



Once it has been filled in it can then be uploaded. The Customer upload will recognise that the file has been provided by ServiceSight and map the fields automatically for the user.

The available fields are:

Account Code	Fax
Company Name	Email
Address 1	Website
Address 2	Prospect (Y/N)
Town/City	Contact First Name
County	Contact Last Name
Post Code	Contact Mobile No
Country	Contact Phone Ext
Phone	Contact Email

3.1.3 Field Mapping

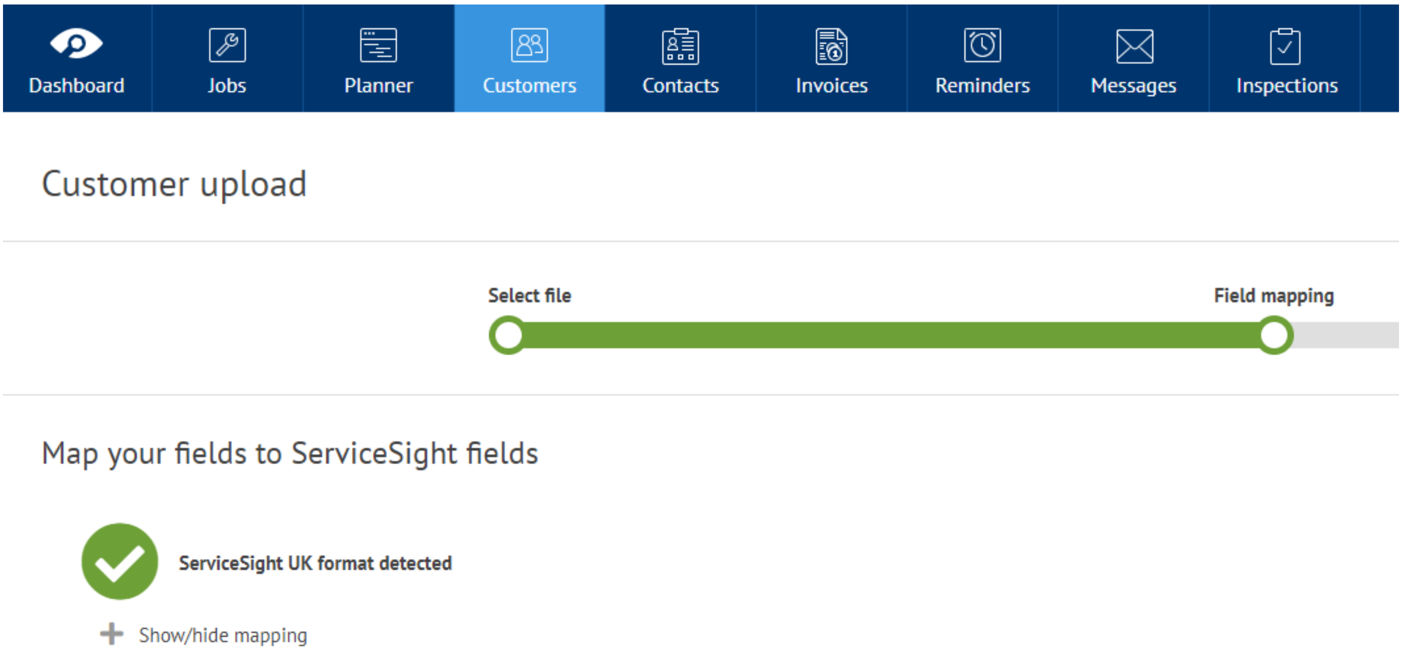
Clicking the ‘Next’ button allows the system to check the fields in the file and check to see if it is a known format ie Service-Sight, Sage 50 or Quickbooks. In these cases the user is informed and the mapping completed automatically. (see screenshot below). An option is still shown to open the field mapping area.

If the file is not recognise, say in the case of user-created spreadsheet, the system will attempt to map the fields from the file to ServiceSight where possible to assist the user. The user should check and complete this stage before proceeding.

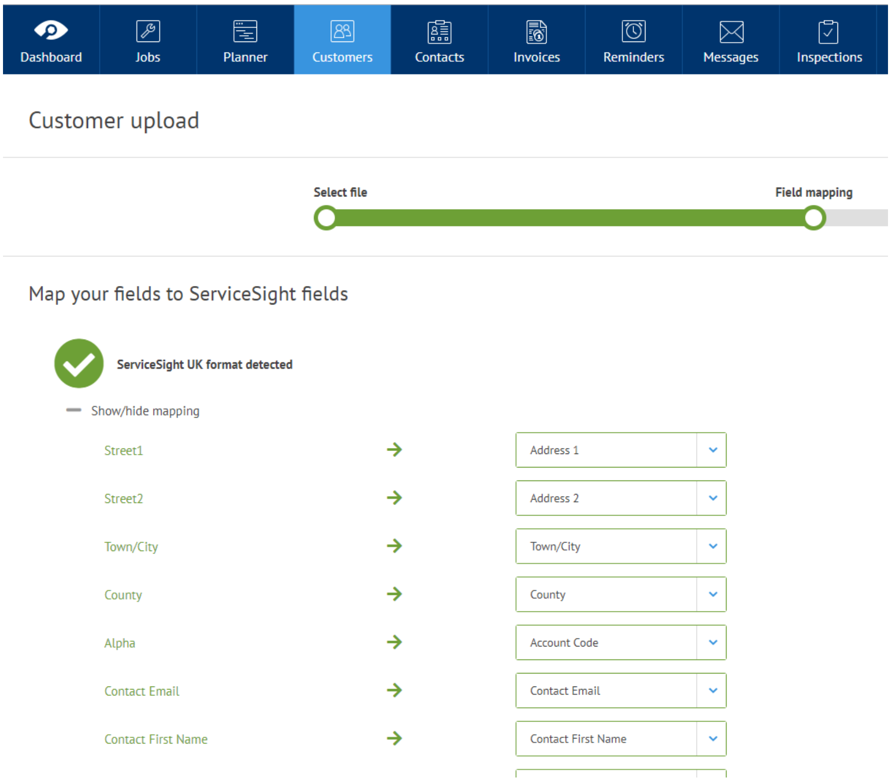
SECTION 3 - WEB ENHANCEMENTS

3.1 Customer Upload (cont)

3.1.3 Field Mapping (cont)



Here we can see that the system has recognised the format as its own downloaded template. If the mapping is opened, or the system cannot detect a known format, the following is shown:



SECTION 3 - WEB ENHANCEMENTS

3.1 Customer Upload (cont)

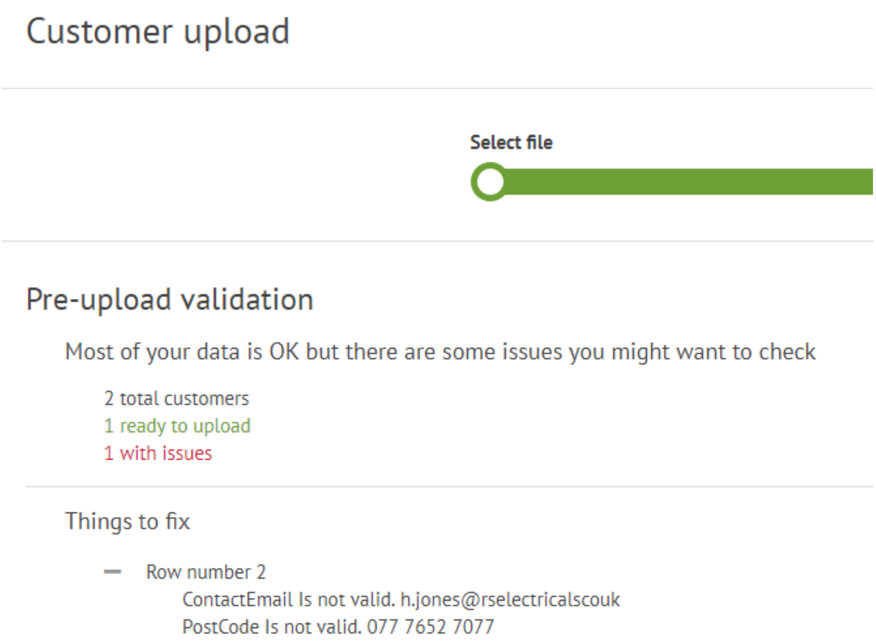
3.1.3 Field Mapping (cont)

The field names from the file uploaded are displayed on the left & the ServiceSight field names are available in drop-down lists so they can be selected as needed against the file field names. Even if the file type is not recognised the system will still attempt to match up as many fields as possible to minimise intervention by the users.

Once the fields have been mapped, click the ‘Next’ button.

3.1.4 Validation

The system will now take the file & the mappings and validate the data provided before uploading it into ServiceSight. A report is presented to the user to inform them how many records can be read, how many are valid and how many are invalid. For any that are deemed invalid the system will provide detail on how this can be resolved. Note that the user can still go ahead and upload the verified records without fixing the data with problems. Only the validated data will be uploaded.

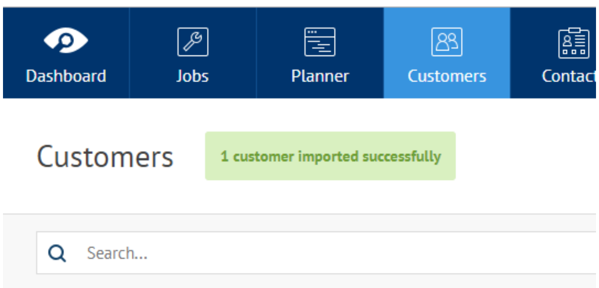


The screenshot shows an upload where one record has issues. The system reports that 1 record has issues (in red) and then below what the details of the issues are - in this case that the contact email address format is invalid and that someone has put a phone number in the post code field.

As mentioned the user could click the green upload button and only the good record would be uploaded, or the user can fix the data and try the validation again.

3.1.5 Upload

On clicking ‘upload’ the validated customer records are added (or updated) into the database. On completion the user is taken to the Customer list screen. A green message is displayed at the top of the list to let the customer know how many records were added.



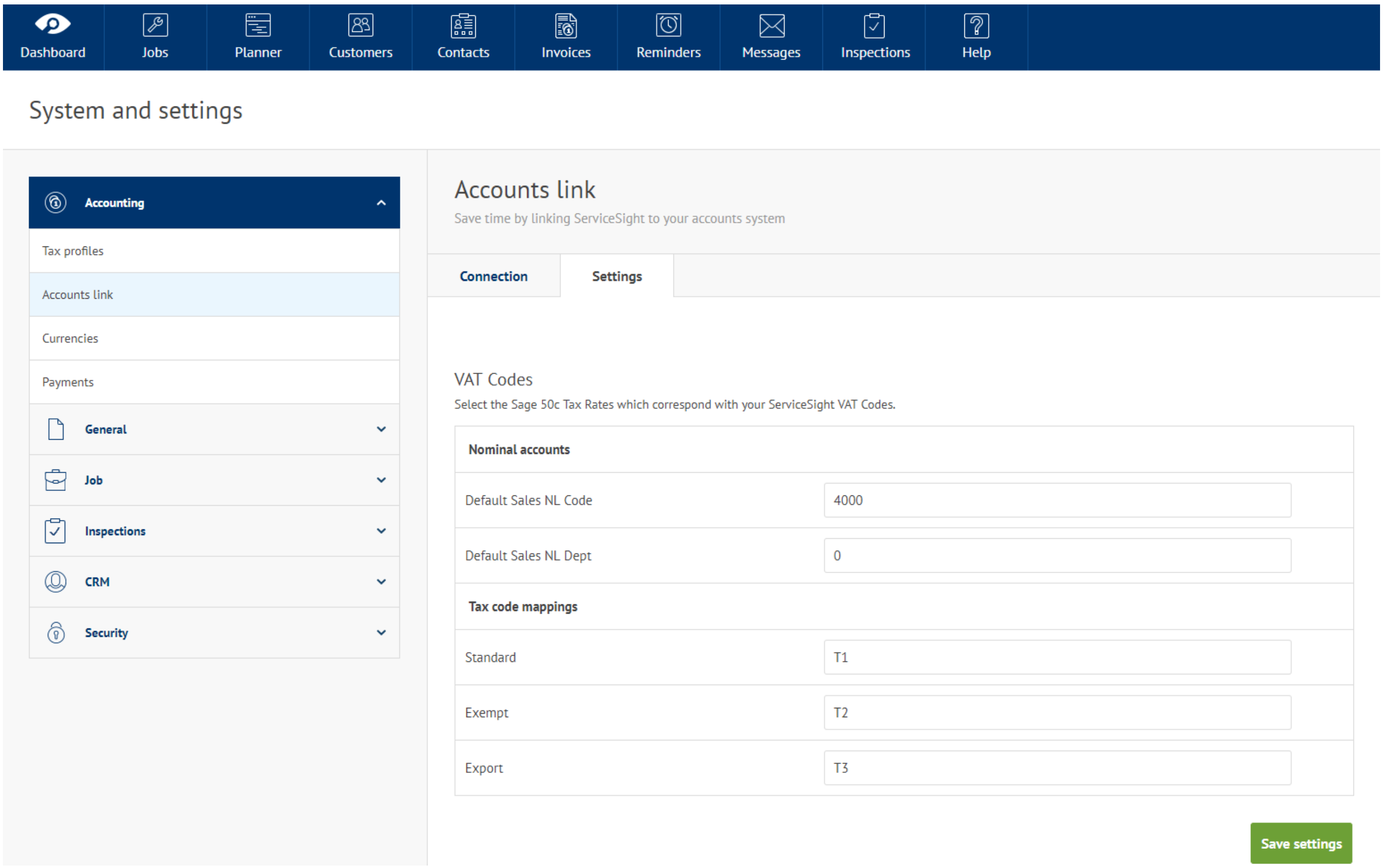
SECTION 3 - WEB ENHANCEMENTS

3.2 Sage 50 Invoice Export

ServiceSight now includes the ability to output Sales Invoices in Sage 50 file formats. Users can select a range of invoices to output, by Invoice No or date, and then a CSV file is generated and downloaded. Users can then import this file into Sage 50 as Audit Trail transactions to get the sales invoices onto the relevant customer accounts.

3.2.1 Setting Up the Accounts Link to Sage 50

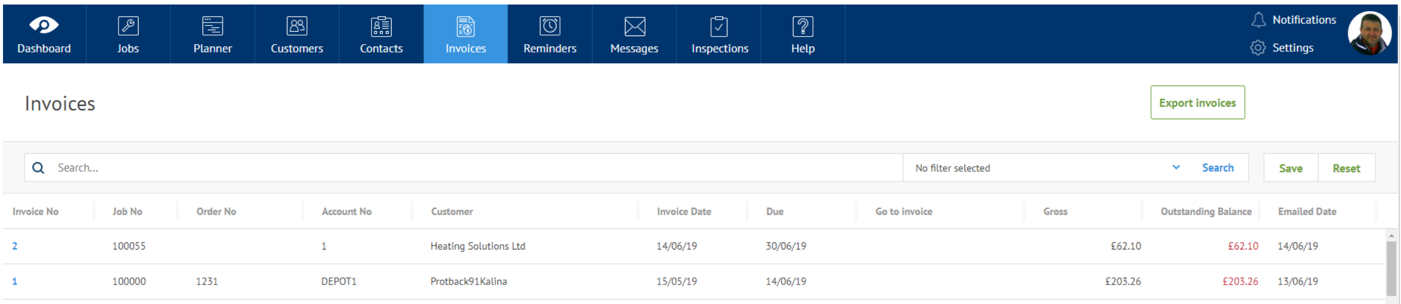
1. To enable the invoice export for Sage 50 go to Settings / Accounting / Accounts Link on the menu.
2. In the UK & Ireland you have the choice of linking to Xero or Sage 50. Click on the Sage 50 icon.
3. Click the green 'Link to Sage 50c' button.
4. A success message is displayed and a new tab called 'Settings' appears. Go to this tab.
5. Here users need to select the default sales nominal code & dept to use for ServiceSight invoices. For example 4000 & 0.
6. Users also need to enter the Sage Tax Codes against the ServiceSight tax codes. For example 'Standard' in ServiceSight might be 'T1' in Sage.
7. Note that each of these settings defaults to a value - 4000, 9999, T1, T2 & T3 and can then be changed by users if not correct.
8. If you have changed anything click the green 'Save settings' button to save your changes.
9. You are now ready to output Sales Invoices to Sage.



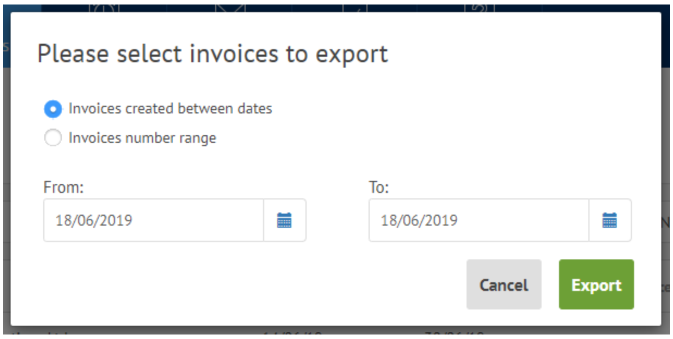
3.2 Sage 50 Invoice Export (cont)

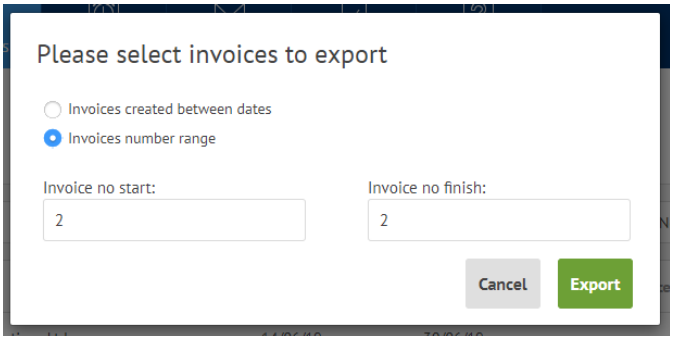
3.2.2 Exporting Sales Invoices from ServiceSight

To select invoices to export to Sage simply go to the Invoice icon on the menu bar to open the invoice list. On the right users can see the ‘Export invoices’ button.

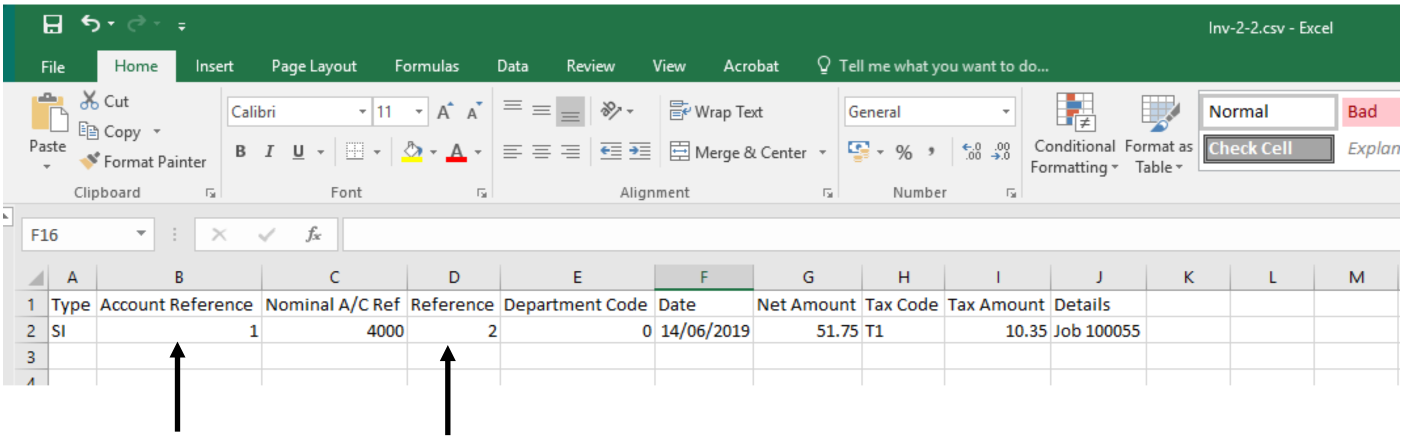


A small form appears to allow users to choose to select invoices by choosing a date range or an invoice number range.





After choosing the selection method users can enter the range parameters. Once entered click the green ‘Export’ button. The file is then generated and downloaded to the users normal download folder. The file name is made up of its contents ie it reflects the range of invoices inside it.



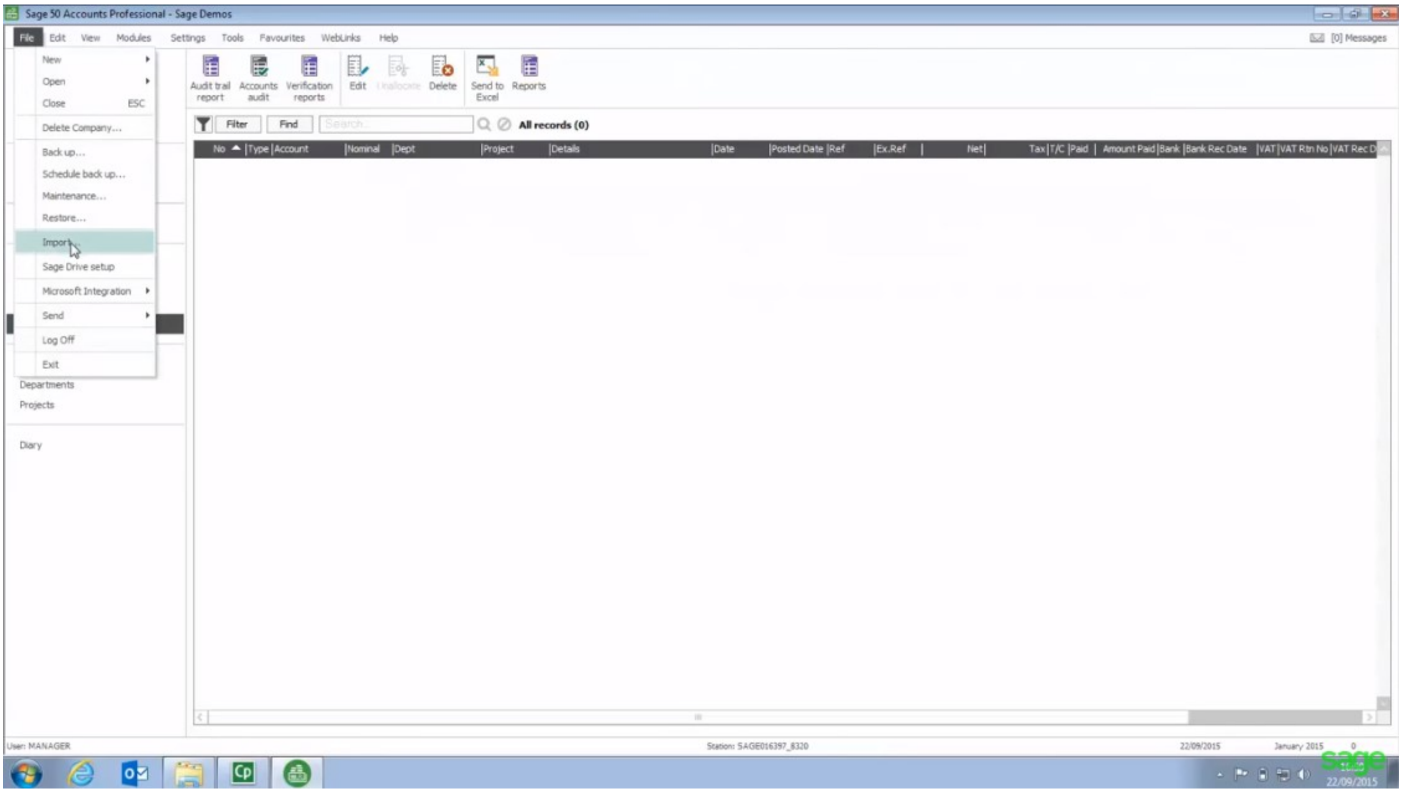
Customer Account Number   Invoice Number

With the file exported you are now ready to import it into Sage 50c

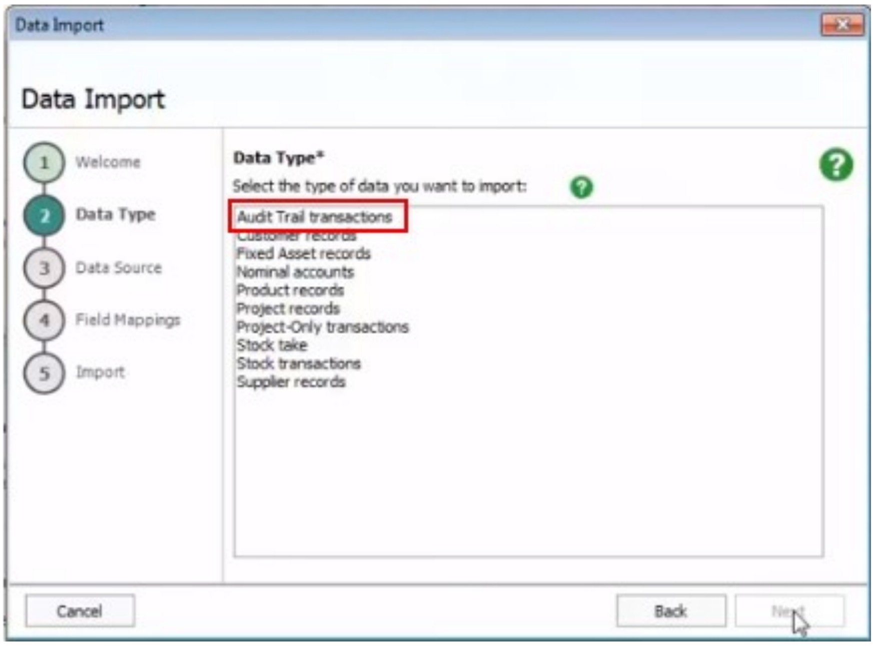
3.2 Sage 50 Invoice Export (cont)

3.2.3 Importing Sales Invoices into Sage 50

1. In Sage go to 'File' on the menu bar and then click 'Import'



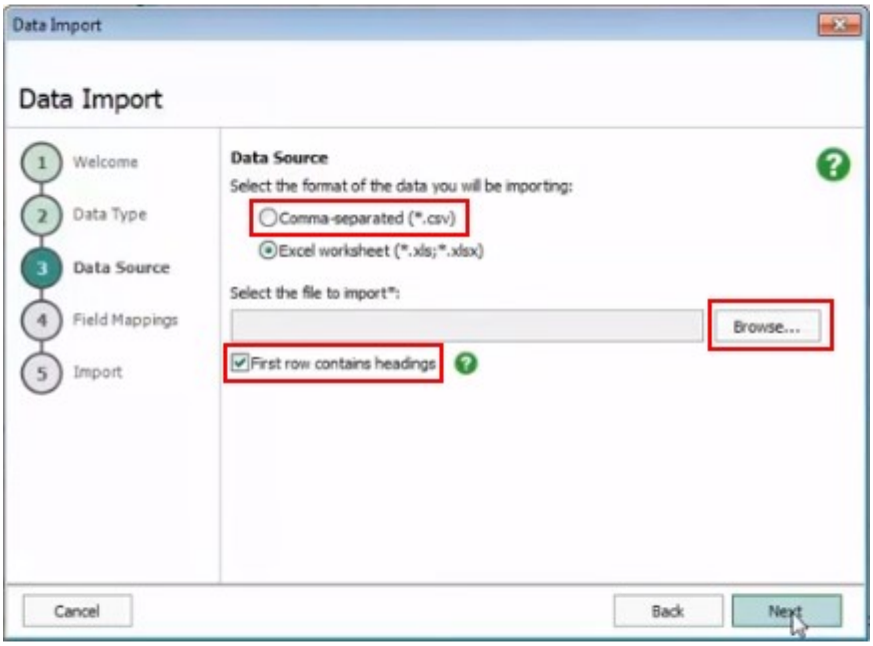
2. If required, click 'Backup' to back up your data and then click 'Next'
3. In the Data type window select 'Audit Trail Transactions' and choose 'Next'



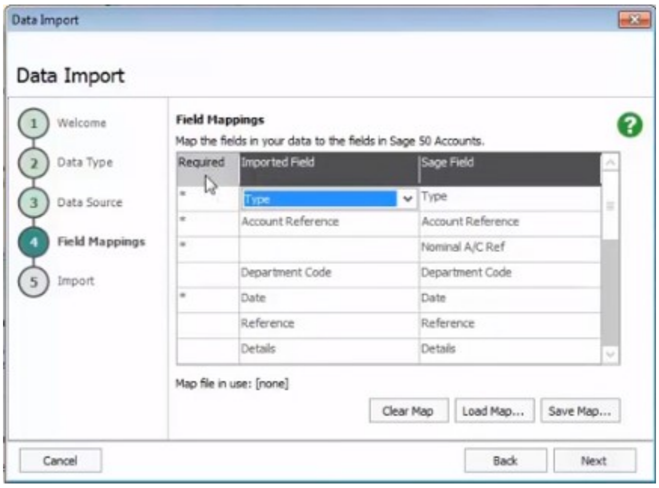
3.2 Sage 50 Invoice Export (cont)

3.2.3 Importing Sales Invoices into Sage 50

4. In the Data source window select 'CSV'



5. Make sure the 'First row contains headings' check box is selected
6. Click 'Browse' and locate the invoice file output by ServiceSight & then click 'Open'
7. Click 'Next' and complete the Imported Field column as required. This should map automatically but if not the Service-Sight field names are the same as the field names in Sage to make mapping easier.

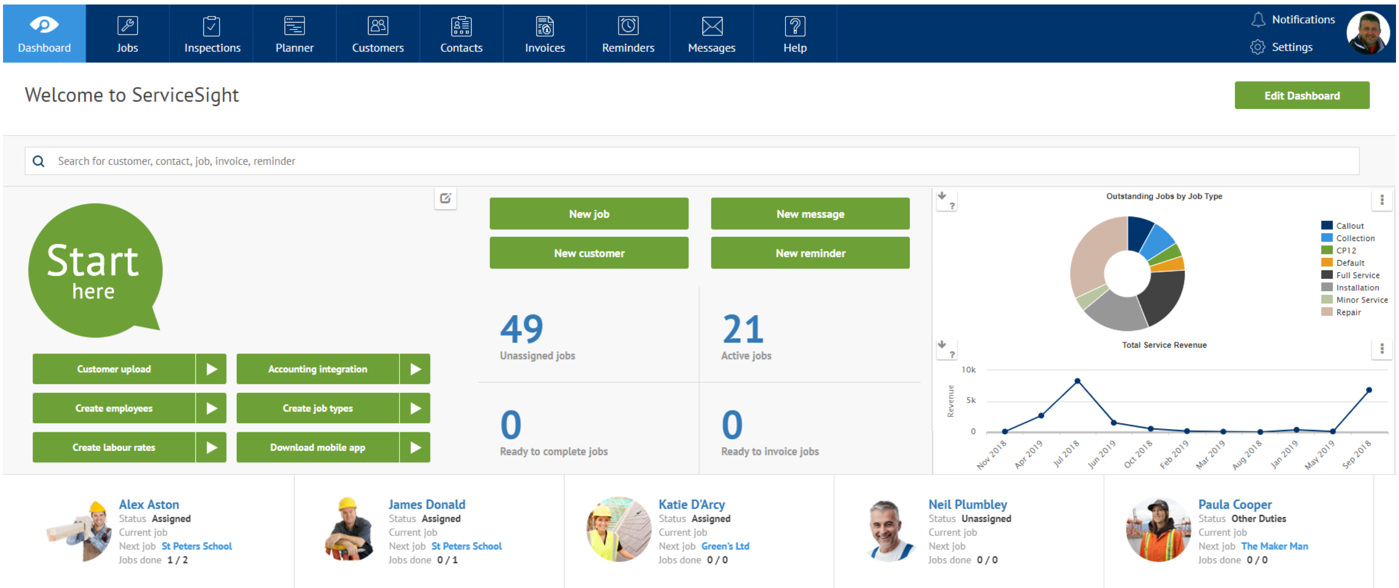


8. Click 'Next' then 'Import'
9. If the import is successful a list of transactions imported appears. Click 'Close'

SECTION 3 - WEB ENHANCEMENTS

3.3 ‘Welcome’ Widget

To make the initial set up of ServiceSight easier, especially for first-time users, we have added a ‘Welcome’ widget to the dash-board by default. Note that the widget can be removed at any time by editing the dashboard.

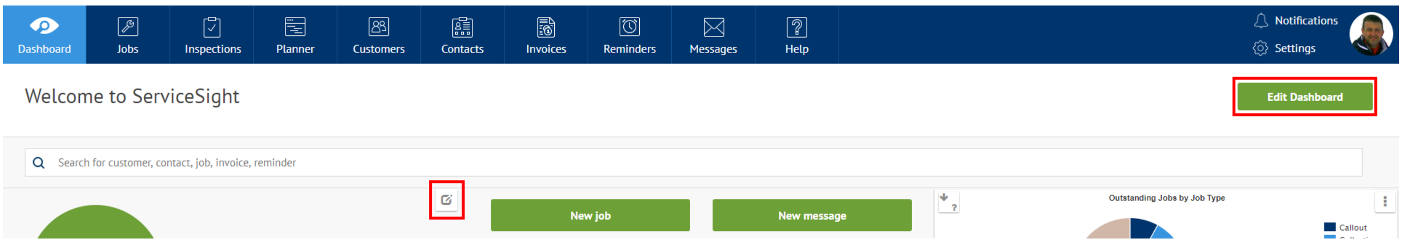


The widget contains links to the main areas of the system that need setting up prior to first use:

Customer upload (if not linked to accounts system)	Opens the Upload feature ready for you to select the file
Accounting integration	Open the Settings / Accounting / Accounts Link page
Create employees	Opens Settings / General / Employees
Create job types	Opens Settings / Jobs / Job Types
Create labour rates	Opens Settings / Jobs / Labour Rates
Download mobile app	Opens Google Playstore on ServiceSight app page

Next to each link button is a ‘play’ button that opens the support site on an appropriate video or help article to explain the set up required. For example, if the button is clicked alongside ‘Create employee’ the ‘Adding Employees’ video.

To remove the widget users can either click the small edit icon in the top right-hand corner, which opens the dashboard edit mode or use the ‘Edit dashboard’ button in the top right of the screen.



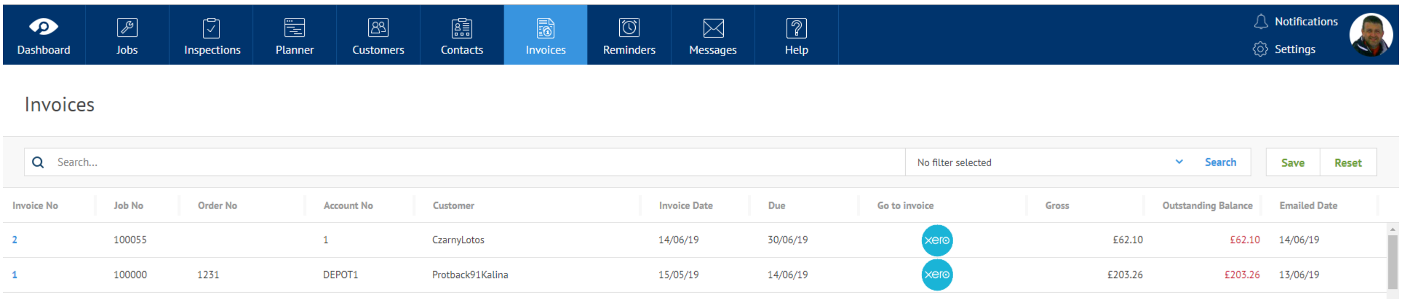
SECTION 3 - WEB ENHANCEMENTS

3.4 Xero Invoice Look Up

To expand integration between ServiceSight and Xero and improve user experience we have added the functionality to enable users to look up an invoice in Xero directly from ServiceSight and vice versa.

3.4.1 Looking up the invoice in Xero from ServiceSight

Go to the Invoice list in ServiceSight. Any invoice that has been synched with Xero will have a small Xero logo in the 'Go to invoice' column (see screenshot above). Clicking the logo will automatically open the user's Xero company and display the appropriate invoice.



3.4.2 Looking up the invoice in ServiceSight from Xero

Go to the invoice in Xero. If the invoice has come from ServiceSight there will be a 'Go to ServiceSight' button at the top of the invoice near the invoice status. Clicking here will open ServiceSight & display the appropriate invoice from where users can link off to look at the details of the job in question as well as other useful information.