

New Features

- **Mobile – Updated Equipment List on Jobs**

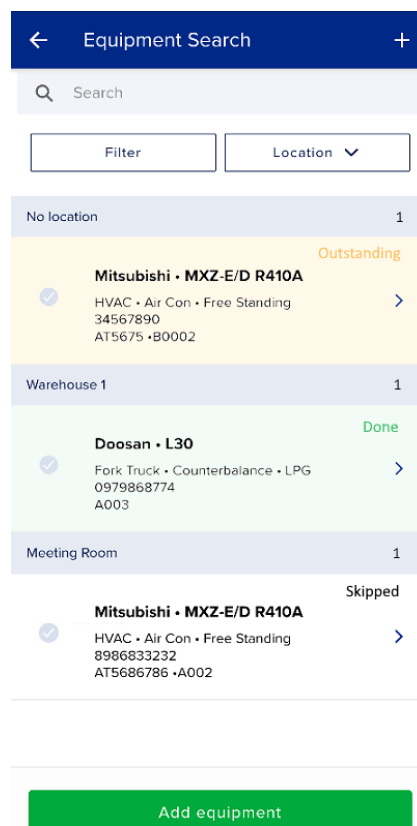
Several updates and improvements have been made to the Equipment List in Jobs to improve the user journey and make it easier to use particularly when users have lots of equipment records on the same job.

Firstly, the system now remembers the last filters used on the list and applies them as defaults the next time the list is opened. So if you always want to include completed equipment, for example, go to the list, turn on the complete filter and see them appear. Next time you come into the list the complete filter will be applied for you automatically.

Secondly, the group headers (which could be location, category or system now show a count of the number of items of equipment in that section.


Thirdly, the job equipment status is shown on each line, that is either Outstanding, Done or Skipped. The records are colour-coded to aid identification with Outstanding being yellow, Done green and Skipped white.

Fourthly, within each section the list is sorted on these statuses, so Outstanding items first, then Done ones, then Skipped ones.



- **Quotations – Job Work Required Added to Layout**

The text entered in the ‘Work description’ of a Job Quote now appears on the Quote layout when printed or emailed.



Customer	Site	Job Quotation		
Blake Estates 1 Lyons Drive Allesley Coventry West Midlands CV5 9PP	Blake Estates Liverpool - 1 Cotton House Old Hall Street Liverpool L3 9TP	Quote No	1096/1	
		Quote Date	21/02/2022	
		Page	1 of 1	
		Account No	1	

Summary

Summary Text Here

Work required

Carry out repairs to the outside lights behind the canteen
Replace bulbs & check fuses
Test

Labour	Unit	Qty	Charge
Labour in hours	£38.00	1	£38.00
Flat charge			£38.00
Total Labour:			£76.00
<u>TOTAL QUOTATION VALUE:</u>			<u>£76.00</u>

Terms

Terms Here

- **Stock – Stock List Updates**

The Stock List screen has been updated to receive the latest list specification including the ability to choose your own columns (including Bin locations) and output the list as an Excel spreadsheet or CSV file.

- **Jobs – Deletion Confirmation Messages**

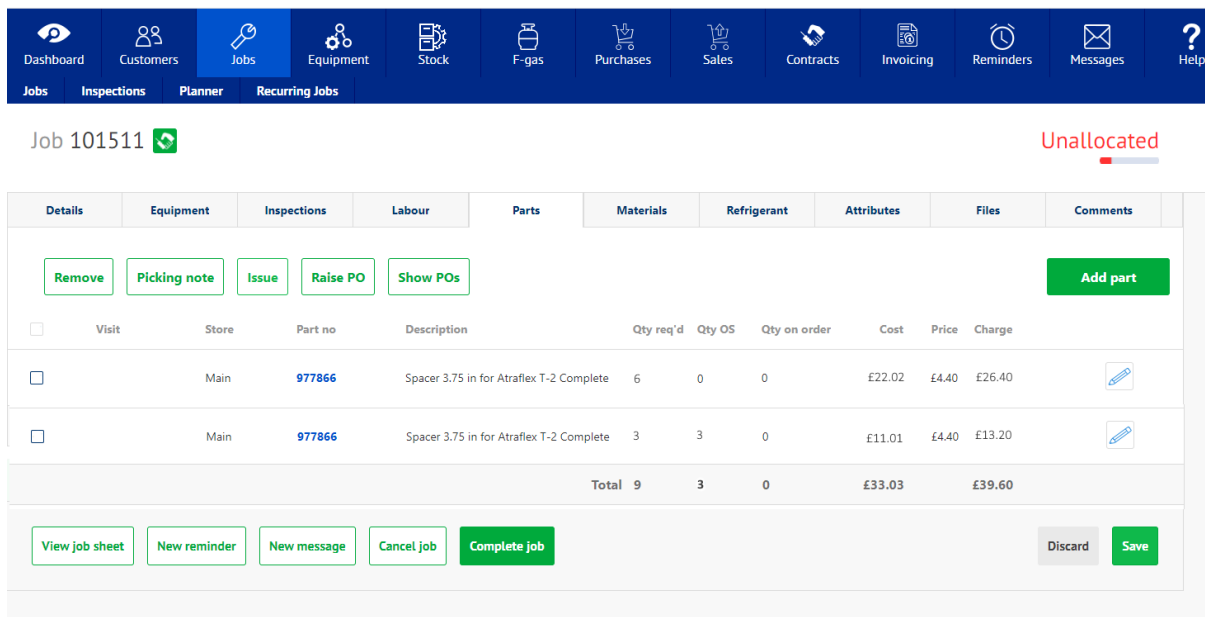
When users attempt to delete anything from a job – inspections, visits, parts, materials, refrigerants, files, attributes or equipment – they will now receive a confirmation message asking them to repeat the delete command which gives users another opportunity to back out and return to the job without deleting the selected items in case it has been done by accident.


- **Jobs – Auto Split Parts Lines Where Full Quantity Cannot be Issued**

The issuing parts logic has been updated on jobs so that if not all of a demand on a job can be met by current availability the user can now go ahead and issue what is available. The system automatically adds a new part line to the job to show the outstanding amount and updates the quantities on the original line to reflect the issue that has happened.

Then the user can simply raise a PO from the job for the outstanding part lines, if desired.

Multiple lines do not appear on the job sheet or invoice. These will show consolidated part movements as currently.



Job 101511  Unallocated

Details	Equipment	Inspections	Labour	Parts	Materials	Refrigerant	Attributes	Files	Comments	
<div style="display: flex; justify-content: space-between; align-items: center;"> <div> Remove Picking note Issue Raise PO Show POs </div> <div style="float: right;">Add part</div> </div>										
<input type="checkbox"/>	Visit	Store	Part no	Description	Qty req'd	Qty OS	Qty on order	Cost	Price	Charge
<input type="checkbox"/>		Main	977866	Spacer 3.75 in for Atraflex T-2 Complete	6	0	0	£22.02	£4.40	£26.40
<input type="checkbox"/>		Main	977866	Spacer 3.75 in for Atraflex T-2 Complete	3	3	0	£11.01	£4.40	£13.20
Total					9	3	0	£33.03	£39.60	
<div style="display: flex; justify-content: space-between; align-items: center;"> <div> View job sheet New reminder New message Cancel job Complete job </div> <div style="float: right;"> Discard Save </div> </div>										