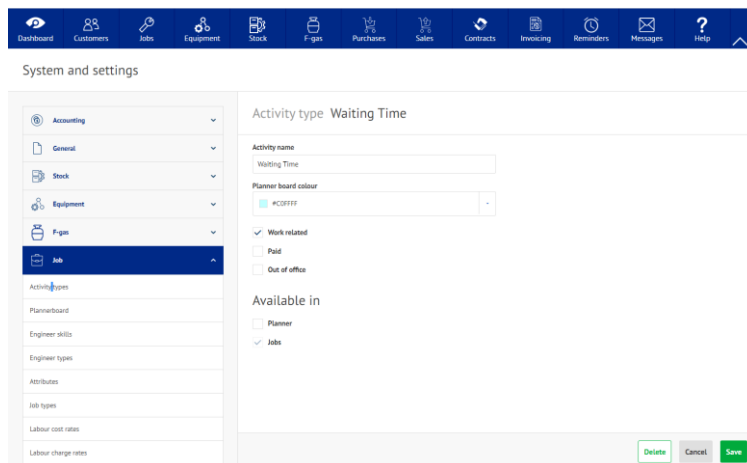


New Features

- **Job Activities**

Pro users can now access a powerful new feature that brings engineer activities within a job. Previously Activities were used solely for planning & recording time engineers spent outside of jobs such as holidays, lunch breaks, medical appointments, waiting for parts and so on. Now users can create specific activity types and add them to jobs, and even assign them to specific visits if required. Engineers can also add and update job activities on the mobile app to provide detail information about tasks they are performing. Whether its recording waiting time once on site, or allowing analysis of every minute of labour recorded, job activities can help.

To create a new activity type or flag an existing one to be available inside a job go to Settings / Job / Activity types



The screenshot shows the 'System and settings' page. On the left is a sidebar menu with categories: Accounting, General, Stock, Equipment, Pages, and Job. The 'Job' category is expanded, showing sub-items: Activity types, Plannerboard, Engineer skills, Engineer types, Attributes, Job types, Labour cost rates, and Labour charge rates. The 'Activity types' item is selected. The main content area is titled 'Activity type Waiting Time'. It contains a form with the following fields: 'Activity name' (with 'Waiting Time' entered), 'Planner board colour' (with a color picker set to #C0C0FF), 'Work related' (checked), 'Paid' (unchecked), and 'Out of office' (unchecked). Below these is the 'Available in' section with two checkboxes: 'Planner' (unchecked) and 'Jobs' (checked). At the bottom right are three buttons: 'Delete', 'Cancel', and 'Save'.


Either add a new type or open an existing one. A new section is displayed called 'Available in' with two options – 'Planner' and 'Jobs'. By default all Activity Types are set to 'Planner' only. Tick the 'Job' box to use this Type inside jobs. An Activity Type can be used both on Planner & Jobs if desired.

Job controllers can add activities to jobs via the new Activities tab on the job screen to set up lists of tasks to be carried out on site. These can either be assigned to particular engineers or left unallocated for the engineer(s) to pick up on the mobile app.

Dashboard Customers **Jobs** Equipment Stock F-gas Purchases Sales Contracts Invoicing Reminders Messages

Jobs Inspections Planner

Job 10042 Awaiting details

Details	Equipment	Inspections	Labour	Activities	Parts	Materials	Refrigerant	Invoicing	Attributes	Files	Comments	
Delete selected		Add to visit										Add activity
<input type="checkbox"/>	Activity	Type	Visit	Start	End	Hours						
<input type="checkbox"/>	4	Survey	1	14:12	15:12	01:00						
<input type="checkbox"/>	5	Waiting Time	1	12:13	12:31	00:18						
						01:18						
<p>Labour analysis</p>  <p>■ On-site labour: 68% - 2h 42m ■ Survey: 25% - 1h ■ Waiting Time: 8% - 18m</p>												
View job sheet		New reminder		New message		Cancel job		Complete job		Discard Save		

On the mobile app engineers can complete assigned activities, select, and complete unassigned activities and log new ones. Activity data is synced back in real-time, and a breakdown of labour is displayed in a chart in the web app, for the whole job on the Activities tab or on the Labour Visit screen to see them broken down by Engineer.

4:06 100%

← Activities


Waiting Time 09:30
Any Notes/Description Here... 10:15

Waiting Time
Any Notes/Description Here...

Waiting Time 09:30
Any Notes/Description Here...

Add activity

Edit visit Complete

Main	Activities	Charges	Signature		
Activity	Type	Start	End	Hours	
4	Survey	14:12	15:12	01:00	
5	Waiting Time	12:13	12:31	00:18	
<p>Labour analysis</p>  <p>■ On-site labour: 57% - 1h 42m ■ Survey: 33% - 1h ■ Waiting Time: 10% - 18m</p>					
Uncomplete		Discard		Save	

- Alerts – Jobs Approaching Due Date**

A new standard alert has been added to those available in Settings / General / Alerts called 'Jobs approaching due date' and is designed to communicate with customers to remind them they are due a visit.

Users can specify how far into the future emails are to be sent, with the default being 1 day. When the due date of job matches the parameter then an email is sent to the specified address reminding the customer of the date and work to be carried out.

Accounting

General

Alerts

Cancellation reasons

Employees

File management

Layout templates

Phrase book

Public holidays

Settings

User references

Stock

Equipment

F-gas

Job

Inspections

Alert Jobs approaching due date

Description

Alert to notify your customers when outstanding jobs are approaching their assigned due date. You can set how long in advance you wish to notify customers using the 'Number of days' value below. Default value is 1 ie Emails are sent 24 hours before the job is due.

Start Date / Time

Repeats Every

Include

Re Notify

Number Of Days

13/04/2022. 14:26

1 Day

Saturday
Sunday

Select...

1

Email Recipients

Message Recipients

Reminders

Reminder Type

Select...

Select...

Custom Email

Header

Upcoming Job on [DUE DATE]

Details

We just wanted to let you know that we have a job scheduled for you on [DUE DATE] to carry out the following.

[WORK DESCRIPTION]

- Mobile - Controlling Visibility of Uploaded Files**

Users can now opt to not allow engineers using the mobile app to see files uploaded to Jobs and Equipment. When uploading files, a new option has been added called 'Visible to engineer'.

If this box is not checked, then the file being uploaded will not be synced to the mobile app for viewing.

Dashboard

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Jobs

Equipment

Stock

F-gas

Purchases

Sales

Contracts

Invoicing

Reminders

Messages

Help

Notifications

Settings

Jobs

Inspections

Planner

Job 10042

Awaiting details

Details

Equipment

Inspections

Labour

Activities

Parts

Materials

Refrigerant

Invoicing

Attributes

Files

Comments

Delete selected

Upload file

Date	Filename	Equip no	Size	Description	Costs	Engine
13/04/2022	bird1.jpg	53 KB	Site Photo			
13/04/2022	BigV.jpg	19 KB	Purchase Order Doc			

View job sheet

New reminder

New message

Cancel job

Complete job

Discard

Customer

Acc no. DEPOT1

Name Kalina UK Dev2

Upload file

Description

Purchase Order Doc

Select file

Visible to customer

Visible to engineer

Cancel

Save

- **Jobs – Auto-Calculated Materials Selling Prices**

When materials are added to a job in the web app the selling price is calculated automatically, where possible, based on the cost and the price list set up against the customer. Materials added on the mobile app, with a cost, also now exhibit this behaviour.

- **Jobs – Add Inspections When Change Job Type**

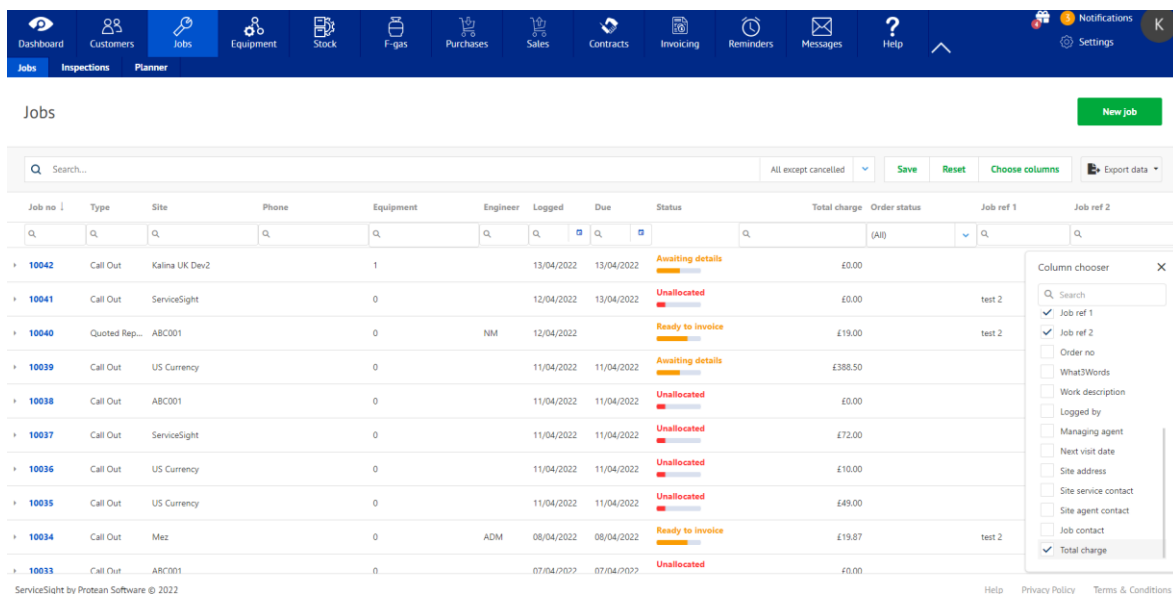
If the Job Type is changed on an existing job the system will now check and add any inspections linked to the new job type onto the job automatically. Checks are made to prevent duplications.

- **Jobs – Job Sheet Changes**

The equipment on a job now appears on the Job Sheet document in Equipment number order, rather than in the order they were added to the job.

- **Jobs – Addition of Total Charge to Jobs List Column Chooser**

The total price of the job is now available as a column to add to the Jobs List screen.



The screenshot shows the Service Sight web application interface. At the top is a navigation bar with icons for Dashboard, Customers, Jobs (active), Equipment, Stock, F-gas, Purchases, Sales, Contracts, Invoicing, Reminders, Messages, Help, and a user profile icon. Below the navigation bar is a 'Jobs' section with a 'New job' button. A search bar and filters are present above the table. The table lists jobs with columns for Job no, Type, Site, Phone, Equipment, Engineer, Logged, Due, Status, Total charge, Order status, Job ref 1, and Job ref 2. A 'Column chooser' dropdown is open, showing a list of columns that can be added to the table, including 'Total charge' which is checked.

Job no	Type	Site	Phone	Equipment	Engineer	Logged	Due	Status	Total charge	Order status	Job ref 1	Job ref 2
10042	Call Out	Kalina UK Dev2		1		13/04/2022	13/04/2022	Awaiting details	£0.00			
10041	Call Out	ServiceSight		0		12/04/2022	13/04/2022	Unallocated	£0.00		test 2	
10040	Quoted Rep...	ABC001		0	NM	12/04/2022		Ready to invoice	£19.00		test 2	
10039	Call Out	US Currency		0		11/04/2022	11/04/2022	Awaiting details	£388.50			
10038	Call Out	ABC001		0		11/04/2022	11/04/2022	Unallocated	£0.00			
10037	Call Out	ServiceSight		0		11/04/2022	11/04/2022	Unallocated	£72.00			
10036	Call Out	US Currency		0		11/04/2022	11/04/2022	Unallocated	£10.00			
10035	Call Out	US Currency		0		11/04/2022	11/04/2022	Unallocated	£49.00			
10034	Call Out	Mez		0	ADM	08/04/2022	08/04/2022	Ready to invoice	£19.87		test 2	
10033	Call Out	ARC001		0		07/04/2022	07/04/2022	Unallocated	£0.00			

Column chooser options:

- ☐ Job ref 1
- ☒ Job ref 2
- ☐ Order no
- ☐ What3Words
- ☐ Work description
- ☐ Logged by
- ☐ Managing agent
- ☐ Next visit date
- ☐ Site address
- ☐ Site service contact
- ☐ Site agent contact
- ☐ Job contact
- ☒ Total charge

- **Customer & Contact Uploads – Additional Fields Added**

The following new fields have been added to the Customer Import Schema:

Invoice Email Address

Payment Terms

Invoice Date

End of Month

Payment Term Days

Tax Code

Order No Required

User Ref 1

User Ref 2

Warning Notes

The following new field has been added to the Contact Import Schema:

Contact Type

Accounts

Service

- **Stock Parts Uploads – Additional Fields Added**

The following new fields have been added to the Stock Parts Import Schema:

Min

Max

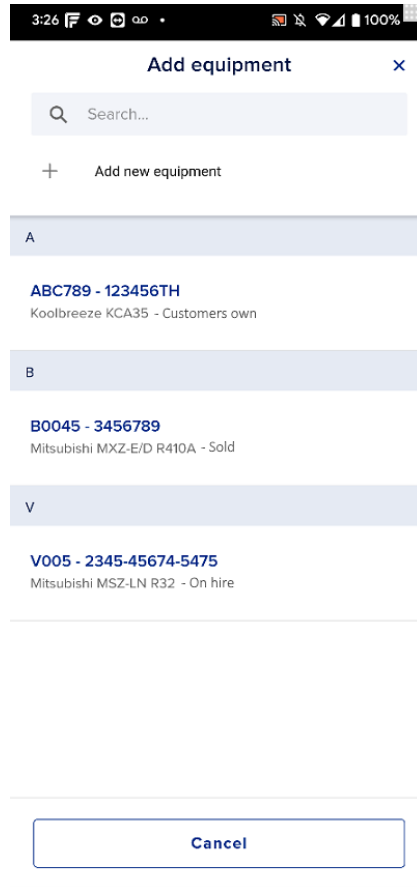
- **Mobile – Unassigned Inspections**

Previously, if inspections were added to a job and not pre-assigned to a particular visit they were auto assigned to visit 1. This behaviour has now been changed so that unassigned inspections remain unassigned and visible to all engineers on a job.

Engineers can then select inspections that they are carrying out which will automatically assign them to their visit.

- **Mobile - Equipment Status Added to List Fields**

To aid clarity the equipment status has been added to the list of equipment on site when adding equipment to a job on the mobile app.



3:26 [status bar icons] 100%

Add equipment x

Search...

+ Add new equipment

A

ABC789 - 123456TH
Koolbreeze KCA35 - Customers own

B

B0045 - 3456789
Mitsubishi MXZ-E/D R410A - Sold

V

V005 - 2345-45674-5475
Mitsubishi MSZ-LN R32 - On hire

Cancel

- **Mapping of Imported Customers**

When users upload customer records from Excel into ServiceSight the system will now perform the same What3Words and Google Mapping look ups as when customers are added manually.

- **Warning & Site Notes Extended**

Following user feedback, the length of the Warning & Site Note fields on the Customer & Site records has been increased and is now unlimited.

To support this change the Warning Notes section on the Accordion has been updated also.

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F-gas

Purchases

Sales

Contracts

Invoicing

Reminders

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Sales opportunities

Quotes

Notifications

Settings

K

Customer DEPOT1

YOU

Name

Kalina UK Dev2

Status

Active

General

Accounts

Sites

Contacts

Attributes

Systems

Skills

Refrigerant

Memo

Options

History

Files

Warning notes

What is Lorem Ipsum?

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Engineer site notes

General notes

Your changes have been successfully saved

Map

Warning notes

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Help

- **Blocking Deletion of Inspection Layouts in Use**

If an inspection template uses a bespoke layout the system will now check if a user attempts to delete the bespoke layout and deny this action.