

9.49 Release

20th January 2022

New Features

• Equipment Condition & 'Out of Action'

Users can now configure a range of conditions that can be applied to Equipment records to add information but also aid in the prioritising of work. In Settings / Equipment / Conditions you will find 3 pre-set conditions users can apply if desired – Good working order, Requires work, and Out of action. These conditions can be edited, and new conditions can be added easily.

Dashboard	8 Customers	/р Jobs	Q C Equipment	Stock	F-gas	ो है Purchases	ोू Sales	Contracts	Invoicing	(C) Reminders	Messages	? Help	~	💏 🌖 Notifications 🔣
System	and setti	ngs												
(1) Acco	ounting		~	Equip Maintain ye	ment con	dition	s for use in the C	Out of Action feature						New condition
C Gen	ieral		~											
E) Sto	ck		~	Q Sea	rch									
🔗 Equ	ipment		~	Name			Descri	ption		Colour	code		0	Out of action
	as		~	# Wonder	ful									
dol 🔄			~	E Good wo	orking order		Equipn	nent is in working or	der					
[√] Inst	pections		~	:: Requires	d		Equiph	ient requires some r	epairs to return to	WORK				
sen	vice contracts		~	: Out of a	ction		Equipm	nent is out of action	and cannot be use	id 📃				v
	4		~											

Users can assign a name, description, and colour to each condition. Additionally, conditions can be flagged as 'Out of action' to represent that this condition should indicate that the equipment is completely down, or is off-road, or is switched off and so on.

In Settings / General / Settings there are also two important options linked to conditions. 'Default equipment condition' is used to set the condition of newly created or imported equipment and 'Equipment condition after being returned to service' allows users to nominate which condition to set an item of Equipment back to once it has been worked on by the engineer on the mobile app (note that engineers can update the condition manually at any time). There is also a setting in Settings / Customer portal / Settings called 'Equipment condition to use as 'Out of action'' which is used when consumers request a job on the portal and want to flag any assigned equipment as out of action.

These conditions can be assigned to Equipment records on the Equipment form by selecting a new condition from the list at the top of the form. Note that all equipment records are set to 'Good working order' as part of this release. Changing the condition here will update the colour code appearing by the Equipment number.



Dashboard	<u>යි</u> Customers	Гр Jobs	Equipment	Stock	F-gas	Purchases	ोडी Sales	Contracts	Invoicing	Reminders	Messages	? Help	~	奇 Sotifications K ② Settings
Equipm	ient no	0987654	3											< >
Make			Model			Status			Condition			_		
VW			Golf			Stock		~	Quite bad			~ !*	nage	^
									Good worki	ng order			-	
General	Attribut	es Ser	vicing I	Refrigerant	Notes	History	File	5	Requires wo	rk			alt	North Color
Carial no.						Site			Out of actio	n	_			A AND
Seriar no						Kalina UKI	Dav2		Quite bad		_			
						Rainia OK	0412		wondenui		_	- 1		
Equipment o	ontact				+ New conta	t Location					+ New locati	on		
Select					~	Select							ST Carl	
Value														
£					1,000.00							c	ustomer	~
													ite	~

You can also add Condition to the Equipment List screen by selecting it on the Column Chooser. The list can be filtered and sorted by Condition if needed.

Dashboard	음 Customers	Jobs	Equipment	Stock	F-gas	े Purchases	设 Sales	Contracts	Invoicing	Reminders	Messages	? Help	~	÷	Settings	К
Equipm	ent list												[Upload -	New equipment	
Q Search											All active equipment	~ Sav	e Reset	Choose column	S Export data	•
Equipment no †	Condition		Make	Mod	el	Serial numbe	r	Logo Site		Category	Туре		Sub-ty	/pe	Status	
Q	٩		Q	٩		٩		٩		۹	٩		٩		Q	
09876543	Quite bad		vw	Golf				YOU Kalina	UK Dev2	Cat1	Stand	lard	Standa	rd Colu	ımn chooser	×
100	Out of actio	n	Ford	Kuga		98676465		YOU Kalina	UK Dev2	Cat1	Stand	lard	Standa	ard 🖌	Equipment no	
101	Good worki	ng order	Ford	Kuga				YOU Kalina	UK Dev2	Cat1	Stand	lard	Standa	ard 🗸	Condition	
102	Good worki	ng order	Ford	Kuga				YOU Kalina	UK Dev2	Cat1	Stand	iard	Standa	erd 🗸	Model	
103	Good worki	ng order	Ford	Kuga				Service	eSight	Cat1	Stand	lard	Standa	ard 🗸	Serial number Logo	
123123	Wonderful		Advance	4000				YOU Kalina	UK Dev2	Control Pane	el Addr	essable	Loops	~	Site	
1231232131	Good worki	ng order	Advance	4000				YOU Kalina	UK Dev2	Control Pane	el Addr	essable	Loops	× ×	Category Type	
								-								

On the Jobs List you can also add a new column, called 'OOA' (Out of action). This column displays a green checkmark if there are any items of Equipment on the job with a condition that has been flagged as OOA. Clicking the small arrow to open the list of Equipment on the Job will expose the individual Equipment conditions for ease of use, without having to go into the Job.

Dashboard	Customers ections PL	Jobs	Equipment	Stock	F-gas	ුවී Purchases	1)会 Sales	Contracts		Invoicing	Reminder	15	Messages	He	etp	^	<i>.</i> **	Settings
Jobs																		I	New job i
Q Search													All e	xcept cancelled	•	Save	Reset	Choose columns	Export data *
Job no 🗎	Туре	Site	Phone	Equi	pment	OOA		Engineer	Logged		Due	Status		Order status		Job ref 1		Job ref 2	Sales opportunity no
٩	٩	٩	٩	Q		(All)		۹	٩	۹	۹ ۵			(All)	~	٩		٩	Q
• 10131	Call Out	0109 UK FGAS		0				ADM	20/01/202	23	20/01/2023	On site							
• 10130	Service	ServiceSight		1					19/01/202	23	10/02/2023	Unallocated							
• 10129	Service	Kalina UK Dev2		1					19/01/202	23	10/02/2023	Unallocated							
10128	Major Service	Kalina UK Dev2		1					19/01/202	23	01/02/2023	Unallocated							
- 10127	Call Out	Kalina UK Dev2		4		×			18/01/202	23	18/01/2023	Unallocated							
Equipment no	1	Make	Model		Ser	ial no		Location			Work	description						Status	
123123		Advance	4000															Outstand	ing
100		Ford	Kuga		986	76465												Outstand	ing
10		Advance	4000															Outstand	ing
09876543		VW	Golf															Outstand	ling



In the Job itself, on the Equipment tab the condition is shown as a coloured bar – you can hover over with your mouse to see the text.

On the mobile app all of the job lists have been updated in the same way. If there are any items of Equipment on jobs with conditions flagged as OOA conditions then these will have a coloured bar to show this, like this:



Inside the job, on the Equipment list screen, all conditions are shown.

← Equipment Search		← D002
Q Search Filter Location V		Doosan • D25S Fork Truck • Counterbalance • Diesel 45756756677856
No Location	2	D002
Outslanding Doosan • D25S Pork Truck • Counterbalance • Diesel 45766758677866 D002 • Out of action	>	Details Report Description
Outstanding Ford Transit - FED Tail Lift - Column Lifts - Reer Frame 45y67456456 D455 - 20001 - Good	>	Condition Out of action
Warehouse 1	1	History >
Outstanding		CFTS
HVAC - Air Con - Free Standing 0979688774 A003 - Good	>	Year of manufacture
		Attachment LC (mm)
		Attachment SWL (kg)



The detail form displays a coloured bar at the top and the condition is also seen in the text fields below. Engineers can edit the Equipment record and update the condition as needed whilst on site. On completion, if the item of Equipment is set to an OOA condition the system will ask the engineer if it should set the condition back to an non-OOA condition (specified in settings – see above).

On the web portal consumers can both see the condition on Equipment and Job lists as well as edit the condition of their equipment on the Equipment Detail form, and as mentioned when adding equipment to requested jobs can flag the item as OOA.

	Equipment A002				
Dashboard	General Attributes Service Contract	Inspections F-gas			
Quotes	Details				
() labe	Make / Model	Serial number	Status	Condition	
100s	Mitsubishi MXZ-E/D R410A	8986833232	Customer's own	Good working order	Cancel Save
Inspections	Location			Good working order Requires work	
B Faultament	Site	Location	Contact	Slightly broken	
Cob Equipment	Blake Estates Liverpool -	Meeting Room	Bhupesh Mistry	Out of action	
F-gas log	Warranty				
	Expiry date				

• Xero Log In

As part of partner relationship with Xero we are pleased to now be able to offer our Xero users the ability to log into ServiceSight using their Xero credentials.

4		
	Service Sight	5
	Login	63
	Email kalina.lazarova@proteansoftware.co.uk	
	Password	1
	Login	C
N	Forgot Password Support	1
	keep Login with Xero	
	f y in D	5
	Version: 9.49.330.0 Build: 18/01/2023 07:29	



• Updated Servicing Tab

The Servicing tab, on Equipment, Sites and Service Groups has had a major overhaul to improve the user experience and make it easier to understand and interact with.

ast completed	service		Completed of	date		Next service d	lue		Due date		
Service			18/01/2023			Major Service			22/02/20	23	
09876543 VW	Golf service sched	ule									2023 4
January	February	March	April	May	June	July	August	September	October	November	December
18/01/2023	22/02/2023						22/08/2023				
onfigura Remove	tion Use defaults	Assign serv	vice group							A	ıdd job type
Configura Remove	tion Use defaults	Assign serv	vice group	val	Calculation	Next due	Last done	Price Inspe	ction	A Budget h	udd job type ours
Configura Remove	tion Use defaults Type Major Service	Assign serv	vice group Interv 6 Mor	val	Calculation From due date	Next due 22/02/2023	Last done	Price Inspe	ction	A Budget h O	udd job type ours
Configura Remove Ty	Use defaults Use defaults PPe Major Service	Assign serv	vice group Interv 6 Mor 1 Mor	val nth nth	Calculation From due date From due date	Next due 22/02/2023 17/02/2024	Last done 3 4 18/01/2023	Price Inspe	ction	A Budget h O O	udd job type ours
Configura Remove Ty	tion Use defaults rpe Major Service Service	Assign serv	vice group Interv 6 Mor 1 Mor	val nth nth	Calculation From due date From due date	Next due 22/02/202: 17/02/2024	Last done	Price Inspe	ction	Budget h O O	udd job type ours

The tab is now split into a Schedule section and a Configuration section. Changes in the Configuration section update into the Schedule which is designed to take your desired configuration and create a diary of planned service visits. Across the top of the Schedule section there are four fields to display the last service done and date, and the next service due and date, useful if you have a complex schedule set up.

Then we can see the visualiser a 12-month calendar with the planned visits indicated and colour-coded by job type from the configuration area. This calendar shows both planned visits and completed visits and users can click on the coloured sections to see links to jobs and actual completed dates and so on.

The dates in the Configuration section have now also been changed so that they update as jobs are done on the system so no matter where the user looks, they will see consistent and correct data allowing them to have complete confidence in the planned maintenance schedules they are using.

• Purchase Order – Cancel OS Button

Users now have the option of updating any partially received Purchase Orders, in situations where the remaining goods will not be arriving or are no longer needed, by using the 'Cancel OS' button. This button is only available Order that have been partially received and after user confirmation will zero the outstanding amount and update the status of the Order to 'Completed'.



Dashbo	oard	Customers	Job	s Equ	ipment Stoc	k F-gas	Purchases	Sales Cor	ntracts Invoici	ing Reminde	ers Messages H
Purchas	se orders	Goods rec	eived	Returns	Suppliers				,		
Pur	chase	order 57	7							Par	rtially received
Gen	eral	Parts		Equipment	Materials	Refrigeran	t Summary	Files	Comments		
R	emove pa	irts									Add parts
	Part num	ber Desc	iption		Store	Qty req'd	Unit cost	Total cost	Due date Re	eceived OS	Link type Link number
	47340	Filter			Main	6	£230.00	£1,380.00	20/01/2023 4	2	
		Total				6		£1,380.00	4	2	
New	/ reminder	New mes	sage		Cancel order	Cancel OS	View order Boo	k in	Сору о	order Dismi	iss Save

• Auto-Add Material Types

The ability to auto-add selected Material Types to Jobs automatically used to be available at Material Type level. Whilst this was useful it was not as flexible or as powerful as it could be so this feature has now been moved to the Job Type form.

On the new Material tab users can pick Material Types they want to add automatically to just Jobs of this type, add a Description to use as well as a default cost and charge value to be used when it is added to the Job. This allows much further flexibility and extends the current functionality.

Dashboard	<u>ය</u> ි Customers	Jobs	Ç Ç Equipment	Stock	F-gas	Purchases	ि Sales	Contracts	Invoicing	(C) Reminders	Messages	? Help	
System	and setti	ngs											
(6) Acc	counting		~	Job ty	pe Callout								
Ger	neral		~	General	Charges	Nominal accou	unts Inspec	tions Mat	erials				
-)) Sto	ck		~	Remove]						A	dd material type	
oo Equ	lipment		~		5								_
F-g	as		~		Material type		Description			Cost	Charge		
dol 🔁			^		Environmental d	sposal	Kemove haz	ardous waste mat	erials	£5.00	115.00		
Antipity tur	0.F												

As part of the release users current set ups will be mirrored onto the new functionality and will continue to operate as before.



• Mobile App – Setting Follow Up Visit Date

This new feature on the mobile app allows engineer to pick a date when flagging a Job as requiring a follow up visit.

This functionality is controlled by a setting in Settings / General / Settings called 'Engineer follow up date manual override'. This option is turned off for the release to maintain current processes.

K Back	Job 10008	~
C Labour	Add Labour	+
Report	Add report	+
Activities (0)	View	>
Equipment (1)	Add Equipment	+
Inspections (0)	Add inspections	+
Materials (0)	Add materials	+
Parts (1)	Add parts	+
Files (0)	Add files	+
Further work required?		
Create follow up visit?	(>
Date	То	day
	Off site	
	Reschedule	



• Sales Opportunity Link Improvements

Two improvements have been made to help enhance the way Sales Opportunities can be linked to Jobs, Sales Orders and so on. Firstly, the Sales Opportunity number has been added to the Jobs List column chooser, and secondly the list of Opportunities users can pick from when linking to another screen has been extended to show the Description field also.

oashboard	<u>8</u> Customers	Jobs	o O Equipment	Stock		ू Purchases	ेति Sales	Contracts	Invoicing	Reminders	Messages	? Help	
obs Insp	pections Plan	ner Recurr	ing Jobs										
Job 101	L825 📀									Waiting	acceptance		
Details	Equipment	Inspections	Labour	Activities	Parts	Materials	Refrigerant	Invoicing	Attribute	is Files	Comments		
Customer				•	New customer	Site					+ New site		Custom
Blake Estates	5				~	Blake Est	ates Liverpool -				~		Acc no.
Job type						Contact					+ New contact		Name
Callout					~	Dick Stra	wbridge				~		
Customisabl	le For Office Use					Customis	able For Office U	se					Address
Select					~								Phone
Date/time d	lue					Order no							Email
24/11/2022,	18:00				a								
						1021	Boiler Installatio	n	30/11/2022	Live Project			Website
Work requir	red					1018	New aircon syst	em for canteen	30/11/2022	Live Project			Status
Needs new o	control panel					1017	Supply & fit new	vequipment for a.	. 31/12/2022	Live Project			Site
						1016	Do some work	s and a still seal a	15/11/2022	indication of Pre	ferred Supplier		
					-	15	Minimal Passein	tion	23/06/2022	Quote Requested			Contact
					U	10	Even this bit mu	ch might help but.		Awaiting Order			Details
what3wo	rds					4	New Forktruck f	or Watehouse	27/03/2021	Demonstration			Credits r
					Ľ	Select					~		
													Equipme
													Reminde

• Customers – W3W Available on Creation

The W3W address field has been added to the New Customer form allowing users to look up and allocate the W3W address whilst creating the customer record, instead of having to add it later.

Customer nam	ė		Account number								
Add custome	er's full name		62								
General	Contact										
Street 1				Street 2							
Town/City				County							
Postcode				Country							
				United Kingdom	~						
/// what3wor	ds										
			ß								



• Jobs – W3W Auto-Updating

If users update the W3W address on a Site record the system will now check if that Site is assigned on any open jobs. If so a message is displayed giving the user the option of also updating those open jobs with the new W3W address.

• Job Groups

Users can now create Job Groups and apply them to Job Types to aid with reporting and searching. In Settings / Job / Job groups users can maintain a list:

P Dashboar	89 U Customers) Jobs	C C Equipment	Stock	F-gas	ि Purchases) Sales	Contracts	Invoicing	Reminders	Messages	? Hetp	~	🗯 🥝 Notifications 🛞		
Syste	m and set	tings														
۲	Accounting		~	Job gr Create you	oups r own names to	o group job types t	together for ea	sier reporting						New job group		
B	General Stock		~	Q. Sea	rch											
de la	Equipment		~	Name 1			Description Group for	all types of install w	ork including new	builds						
ð	F-gas Job		~	Responsive			Callouts, small repairs & domage jobs									
Activity	types			Warranty	minations		All types o	aintenance f warranty work								
Planne	board er skills															
Engine	ar types															
Attribu	105															
Job gro	ups															
Job typ	cost rates															

Then on the Job Type screen these can be applied allowing Job Types to be grouped together.

A new Job Group option has been added to the Column Chooser on the Jobs List and to the Column Chooser on the Plannerboard allowing users to sort and filter by the new Job Group.

Dashbo	oard	යිදු Custome		<i>J</i> obs	e Equipment	E Stor	k F-gas	ျပ္ Purchases)皇 Sales	Contract		Invoicing		(C) Reminders	Mess	✓ ages	? Help	~	<i>f</i>	🕖 Notifi	cations 🧃 95
Jobs	Inspi	ections	Planner	Recurri	ng Jobs																	
Plan	nner b	oard						Sele	ct engin	eers							÷	🤨 Refresh 🕞	Save layout	🗙 Togg	le fullscreen	∷ #
1	<	5 Decembe	r 2022	> •	how working hours	only					^							Day We	ek Work Week	2 Week	2 Work We	ek Month
				8 AM	9 AM		10 AM	11 AM		12 PM	11	РМ		2 PM		3 PM		4 PM	5 PM	6 PN		7 PM
-	Alex Alto	'n	0																			
	Edina De	breczeni	0																			
8	Gill Brow	'n	0																			
à	James De	onald	•																			
	Josh Eva	15	•																			
	Neil Pool	e	•																			
-																		~		Co	lumn Choos	er 💙
1.1			5 14-		ette antida est	-	The sector day 1			Colores					1		1	T Clear filter	Carlos Carlos	rch	Category	
0	o no	+ 1	Q		Q.	-	a a a a a a a a a a a a a a a a a a a	C C	-	Category		Q	2		Q	a	Q			- 1	Group	
. 101	1832		Riaka Estat	es Liverno	1 Cotton House	ин	13.979	Minor Senice		Service		01246			02/12/2022		02/01	/2023			Cquipment	
101	1816		Blake Estat	es Liverpo	1 Cotton House	H bit	L3 9TP	Callout		Callout		01246	654654		16/11/2022		16/11	/2022			Phone	
							0.0.000			A										~	Logged	



• Sales Order List Updated

The list screen for Sales Orders has been updated in line with other lists such as Jobs and Equipment to now offer a Column Chooser, exporting options and advanced filtering and sorting options.

• Despatch Note List Updated

The list screen for Sales Orders has been updated in line with other lists such as Jobs and Equipment to now offer a Column Chooser, exporting options and advanced filtering and sorting options.

• Planner – Auto-Save Current View

Users have the option of saving a preferred view on the plannerboard but sometimes users will find themselves working in a different view, or a different date for a period of time. If a user wants to view a job they are planning, on returning to the planner the default view is restored which can be very frustrating. Now, if a user navigates away by viewing a job, for example, the system will remember where they were working so on clicking the back button on the browser will be taken back to exactly where they need to be. Note that if a user navigates away by selecting a new option on the main menu, then the position will not be saved but revert to the usual default view.

• Equipment – Extended Number Field

s contracts involcing reminders messages netp
Condition
Files

To accommodate large Equipment numbers the field has been extended on the form.

• Settings – Updated Description for Header & Footer

The setting descriptions for Invoice Header & Footer Image and Report Header & Footer Image has been updated with new suggested dimensions for the images to use on those documents - "We recommend an image size of 737 x 126 pixels."



• Help – Further Walk-Throughs Added

Additional walk-throughs have been added to the 'i' buttons in the following areas – Public Holidays; General Settings; User References; Plannerboard Customisation; Reasons Not Done; Job Titles and Reminder Types.

Public holidays Create a list of holiday dates for your	local region that displays in your engineer planner board		New public holiday	i
Q search		Click here to add Public holidays These dates will be shown in the planner as holidays to aid clarify when atteration labe		
Date ↓	Description	© Hide these tips		