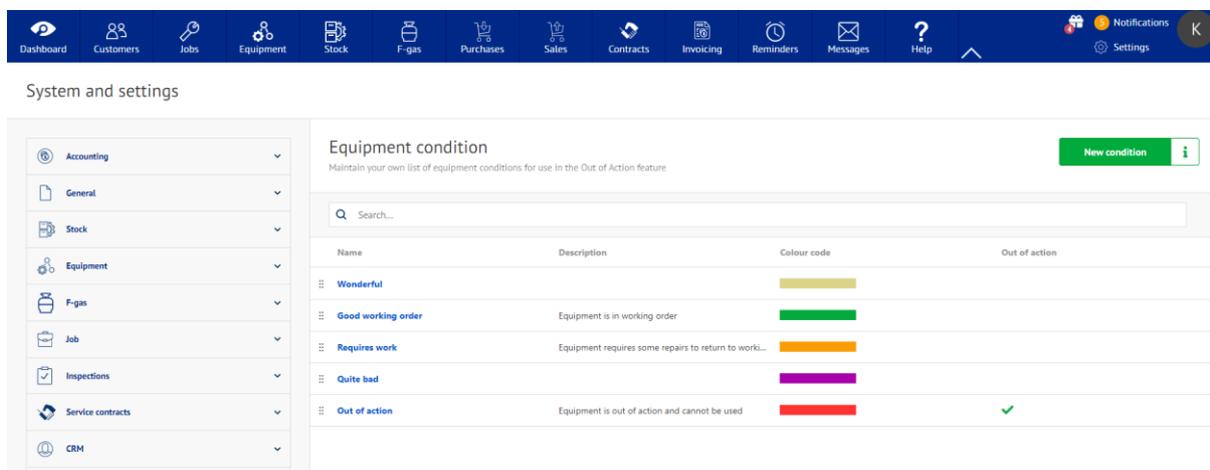


## New Features

- **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.



System and settings

Equipment condition

Maintain your own list of equipment conditions for use in the Out of Action feature

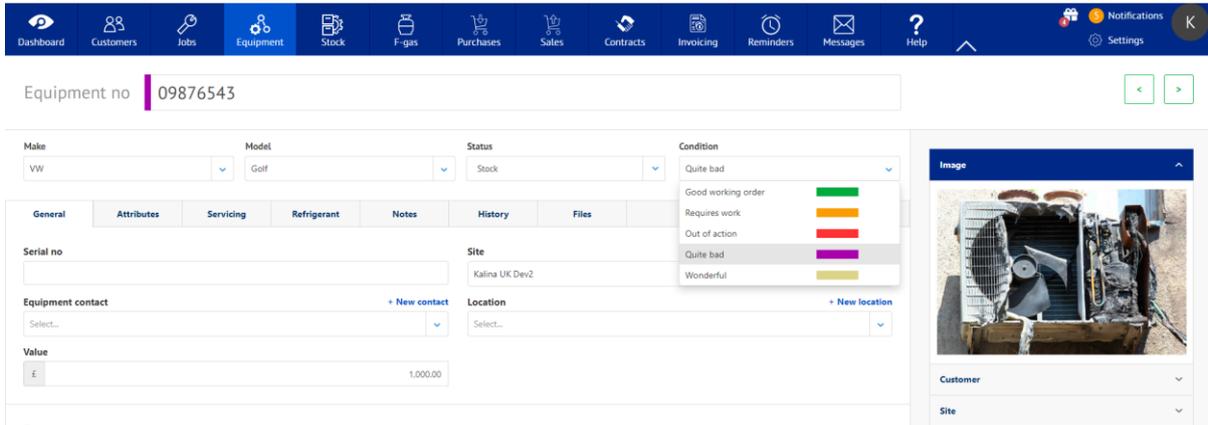
Search...

Name	Description	Colour code	Out of action
Wonderful			
Good working order	Equipment is in working order		
Requires work	Equipment requires some repairs to return to work...		
Quite bad			
Out of action	Equipment is out of action and cannot be used		✓

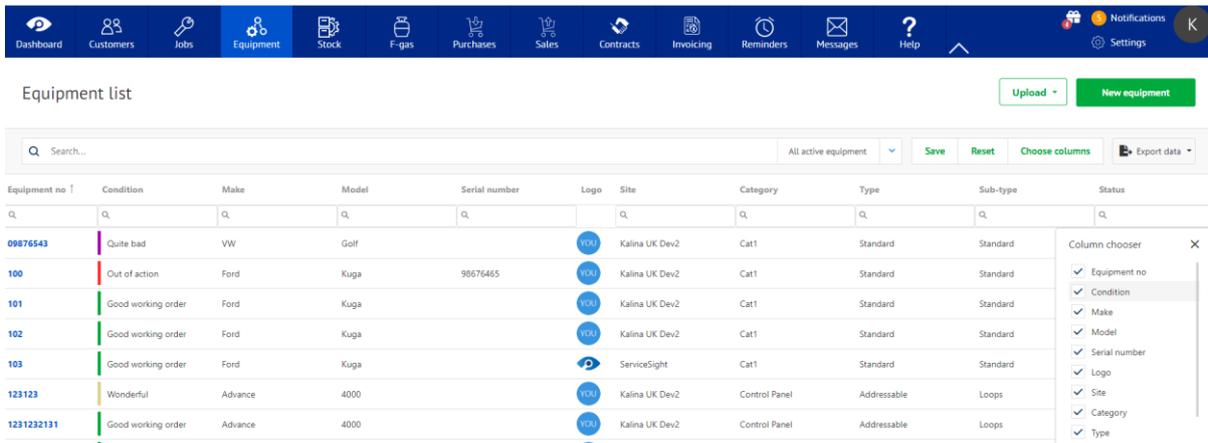
Users can assign a name, description, and colour to each condition. Additionally, conditions can be flagged as ‘Out of action’ to represent that this condition should indicate that the equipment is completely down, or is off-road, or is switched off and so on.

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.

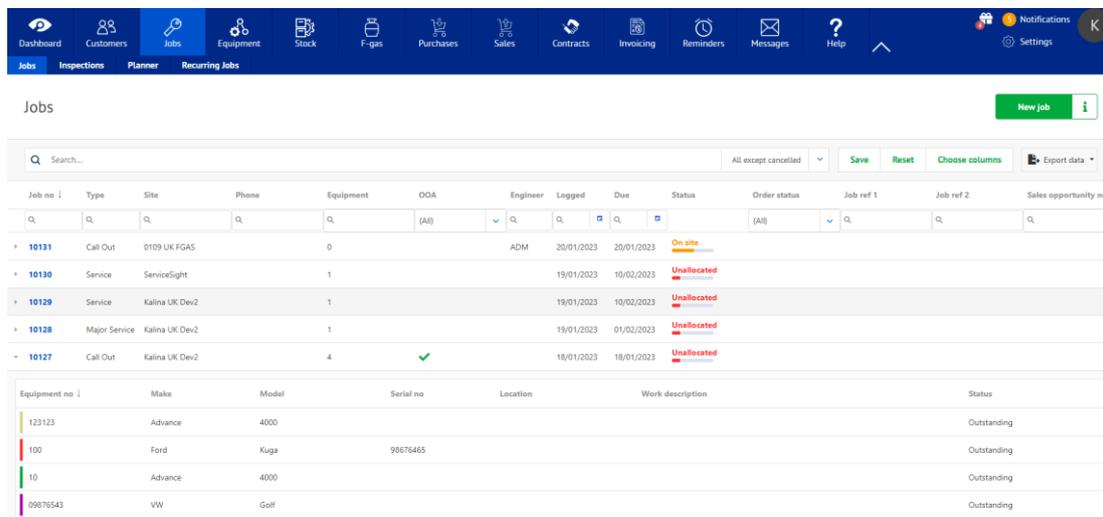


You can also add Condition to the Equipment List screen by selecting it on the Column Chooser. The list can be filtered and sorted by Condition if needed.



Equipment no	Condition	Make	Model	Serial number	Logo	Site	Category	Type	Sub-type	Status
09876543	Quite bad	VW	Golf			Kalina UK Dev2	Cat1	Standard	Standard	
100	Out of action	Ford	Kuga	98676465		Kalina UK Dev2	Cat1	Standard	Standard	
101	Good working order	Ford	Kuga			Kalina UK Dev2	Cat1	Standard	Standard	
102	Good working order	Ford	Kuga			Kalina UK Dev2	Cat1	Standard	Standard	
103	Good working order	Ford	Kuga			ServiceSight	Cat1	Standard	Standard	
123123	Wonderful	Advance	4000			Kalina UK Dev2	Control Panel	Addressable	Loops	
1231232131	Good working order	Advance	4000			Kalina UK Dev2	Control Panel	Addressable	Loops	

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.



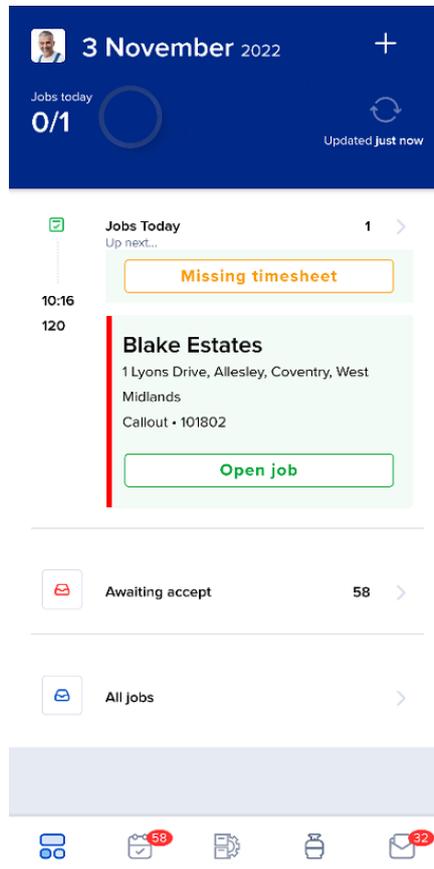
Job no	Type	Site	Phone	Equipment	OOA	Engineer	Logged	Due	Status	Order status	Job ref 1	Job ref 2	Sales opportunity no
10131	Call Out	0109 UK FGAS		0		ADM	20/01/2023	20/01/2023	On site				
10130	Service	ServiceSight		1			19/01/2023	10/02/2023	Unallocated				
10129	Service	Kalina UK Dev2		1			19/01/2023	10/02/2023	Unallocated				
10128	Major Service	Kalina UK Dev2		1			19/01/2023	01/02/2023	Unallocated				
10127	Call Out	Kalina UK Dev2		4	<input checked="" type="checkbox"/>		18/01/2023	18/01/2023	Unallocated				

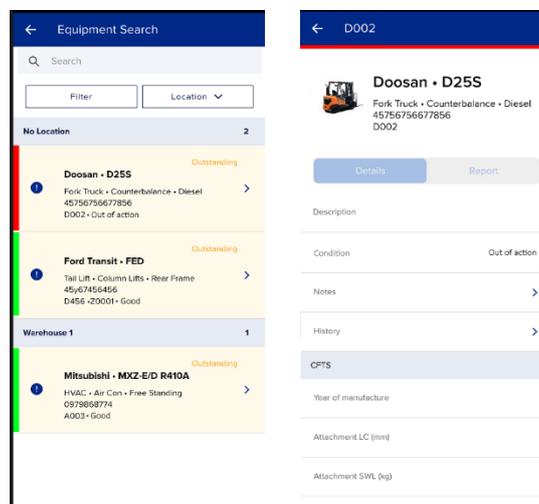
Equipment no	Make	Model	Serial no	Location	Work description	Status
123123	Advance	4000				Outstanding
100	Ford	Kuga	98676465			Outstanding
10	Advance	4000				Outstanding
09876543	VW	Golf				Outstanding

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:

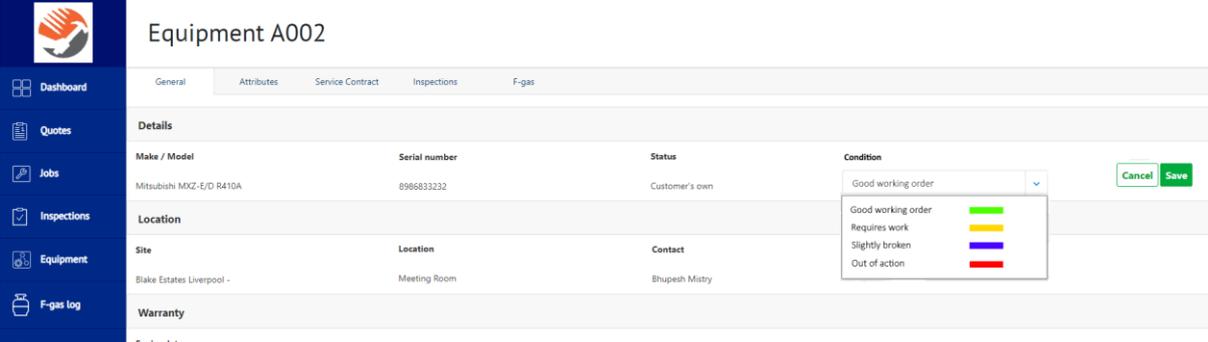


Inside the job, on the Equipment list screen, all conditions are shown.



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 a 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**

General | Attributes | Service Contract | Inspections | F-gas

**Details**

Make / Model	Serial number	Status	Condition
Mitsubishi MXZ-E/D R410A	898683232	Customer's own	Good working order

**Location**

Site	Location	Contact
Blake Estates Liverpool -	Meeting Room	Bhupesh Mistry

**Warranty**

Expiry date

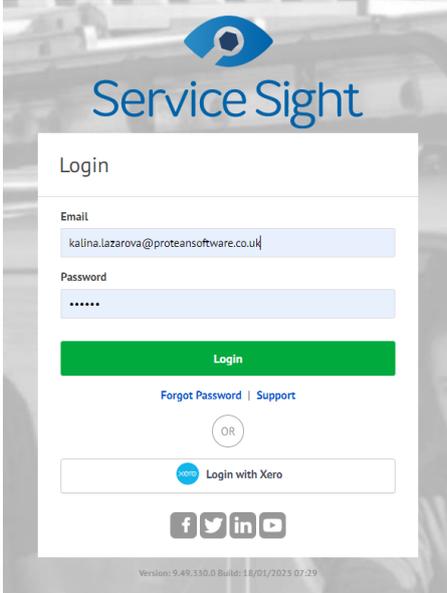
Condition dropdown options:

- Good working order (Green)
- Requires work (Yellow)
- Slightly broken (Purple)
- Out of action (Red)

Buttons: Cancel, Save

- **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.



**Service Sight**

Login

Email  
kalina.lazarova@proteansoftware.co.uk

Password  
\*\*\*\*\*

Login

[Forgot Password](#) | [Support](#)

OR

 Login with Xero

Version: 9.49.330.0 Build: 16/01/2023 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.

### Schedule

**Last completed service**

**Completed date**

**Next service due**

**Due date**

09876543 VW Golf service schedule 2023 < >

January	February	March	April	May	June	July	August	September	October	November	December
18/01/2023	22/02/2023						22/08/2023				

### Configuration

Remove
Use defaults
Assign service group

Add job type

<input type="checkbox"/>	Type	Interval	Calculation	Next due	Last done	Price	Inspection	Budget hours	
<input checked="" type="checkbox"/>	Major Service	6 Month	From due date	22/02/2023				0	
<input type="checkbox"/>	Service	1 Month	From due date	17/02/2024	18/01/2023			0	

New job
New reminder
New message
Copy equipment

Delete
Discard
Save

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'.

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

Purchase orders Goods received Returns Suppliers

Purchase order 57 Partially received

General Parts Equipment Materials Refrigerant Summary Files Comments

Remove parts Add parts

<input type="checkbox"/>	Part number	Description	Store	Qty req'd	Unit cost	Total cost	Due date	Received	OS	Link type	Link number
<input type="checkbox"/>	47340	Filter	Main	6	£230.00	£1,380.00	20/01/2023	4	2		
Total				6		£1,380.00		4	2		

New reminder New message Cancel order Cancel OS View order Book in Copy order Dismiss 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 Customers Jobs Equipment Stock F-gas Purchases Sales Contracts Invoicing Reminders Messages Help

System and settings

Accounting General Stock Equipment F-gas Job

Job type Callout

General Charges Nominal accounts Inspections Materials

Remove Add material type

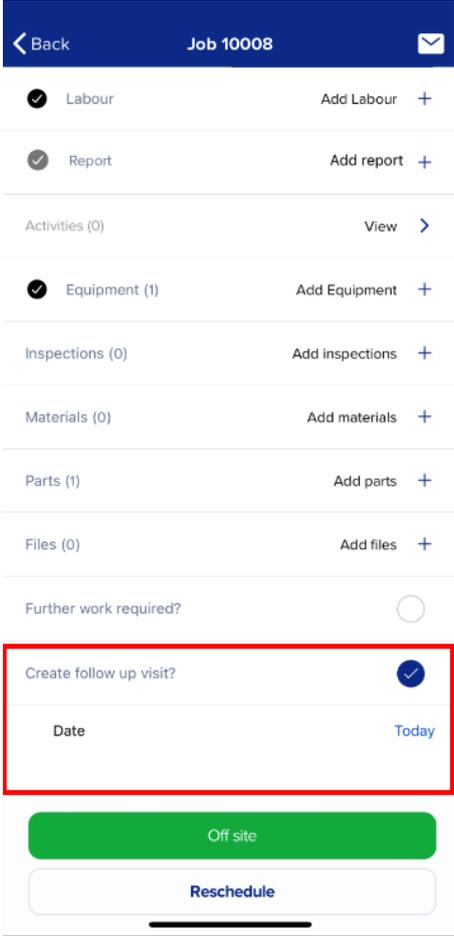
<input type="checkbox"/>	Material type	Description	Cost	Charge
<input type="checkbox"/>	Environmental disposal	Remove hazardous waste materials	£5.00	£15.00

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.



Back Job 10008

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?

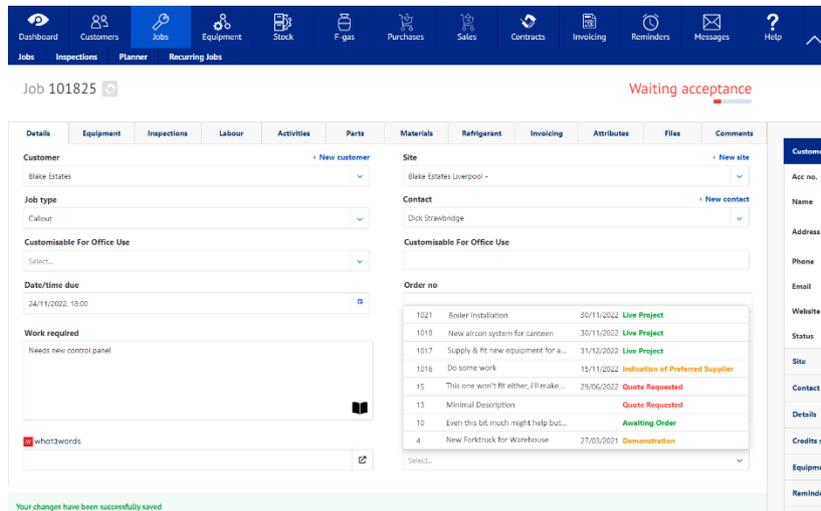
Date Today

Off site

Reschedule

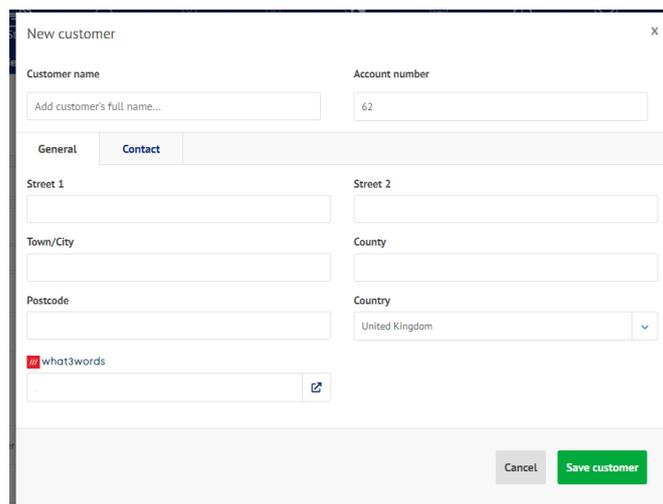
- **Sales Opportunity Link Improvements**

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.



- **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.

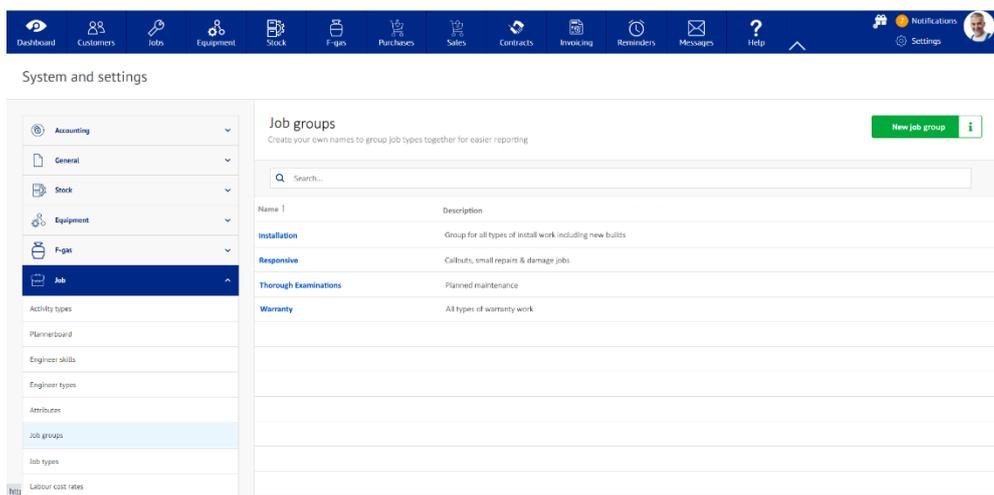


- **Jobs – W3W Auto-Updating**

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.

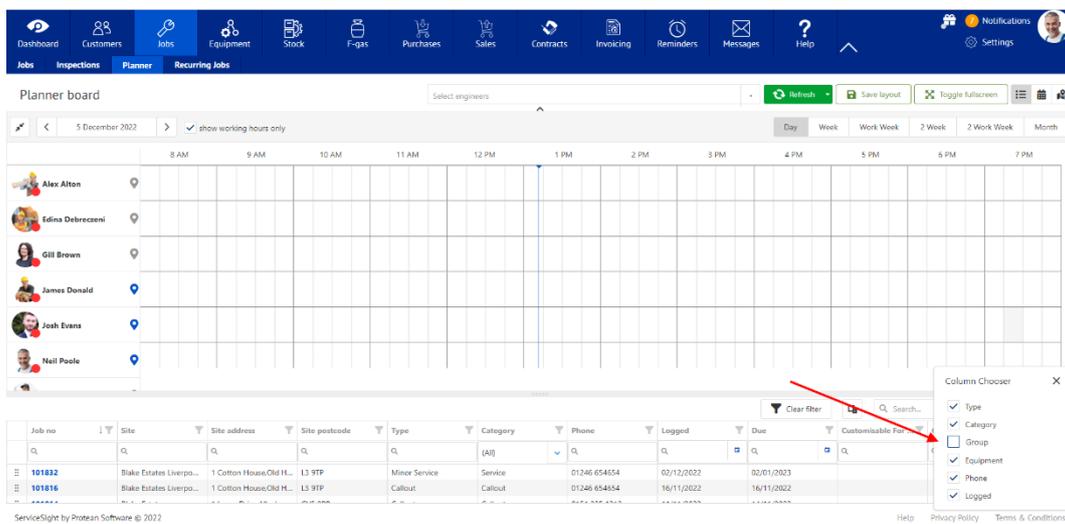
- **Job Groups**

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:



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.



- **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**

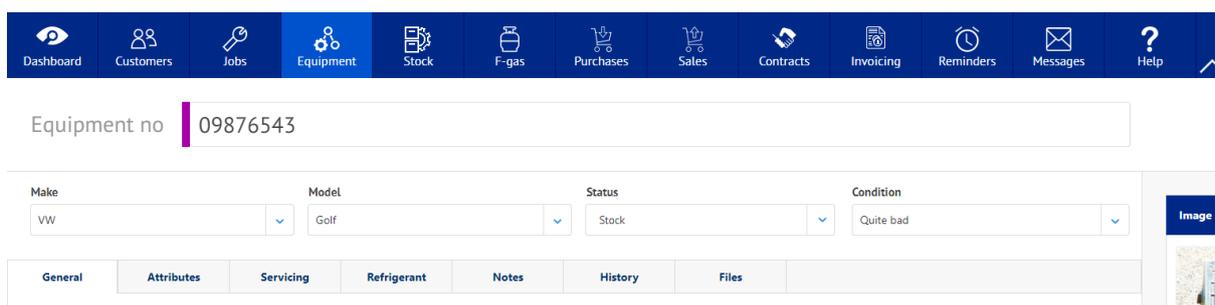
The list screen for Sales Orders has been updated in line with other lists such as Jobs and Equipment to now offer a Column Chooser, exporting options and advanced filtering and sorting options.

- **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**

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.

