9.50 Release   **10ᵗʰ February 2023**
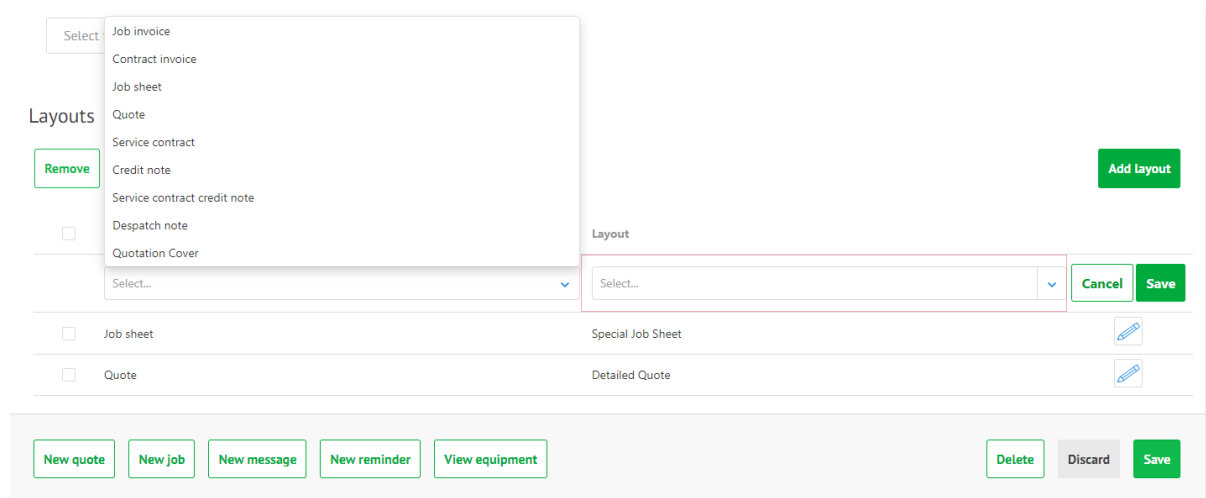

New Features

- **Customer Level Layout Selection**

Currently users can select a custom layout to use for any type of document in *Settings / General / Settings*. This new feature allows users to make this selection on a per Customer basis.
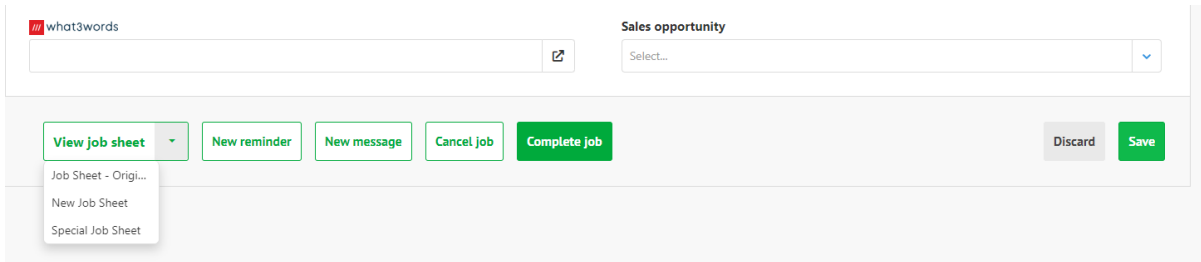

On the Customer 'Options' tab a new section has been added called 'Layouts'. If users which for a document sent to this Customer to be different from the one selected in Settings (see above) then it can be added here as an override. Choose from the list the document you wish to override e.g. Invoice, Quote, Contract and so on, then pick the custom layout you want to use for this Customer. Custom layouts can be created in Setting / General / Layout templates.

When users generate a document the system will check to see if the customer has an override and if so the new layout will be used instead of the one selected in Settings.
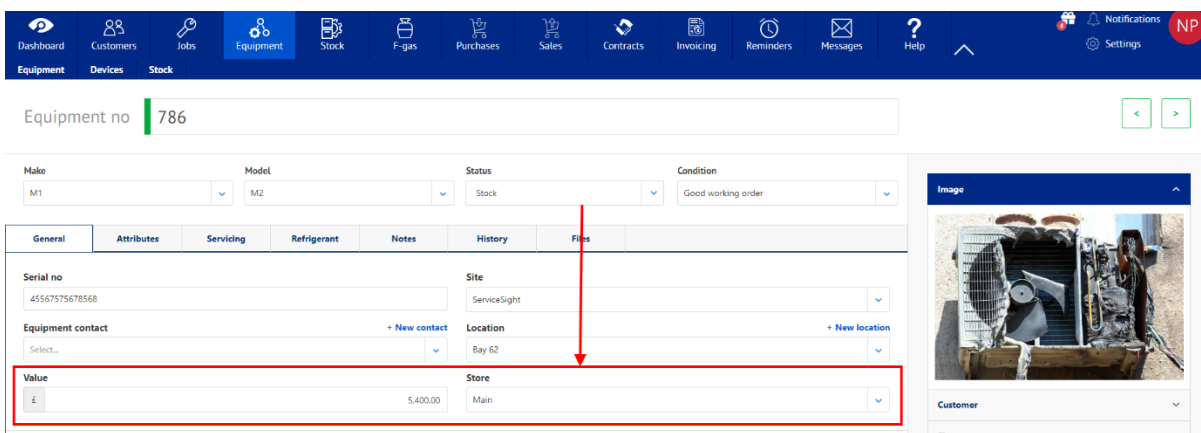

- **Document Level Layout Selection**

To extend the new flexibility with overriding layouts at Customer level, users can now also make a further selection at the point of generation for Quotes, Job Sheets and Job Invoices (incl Preview).

The 'View job sheet' button (and 'View quote', 'Preview invoice' and 'Invoice') has been split. Clicking the main button will generate the relevant document using the layout specified on the Customer record, or in the absence of any override, the one specified in Settings. If the user wants to choose a different layout, clicking the arrow on the right of the button will open a list of all of the custom layouts available for the document type, allowing users to choose a third option for printing and emailing.
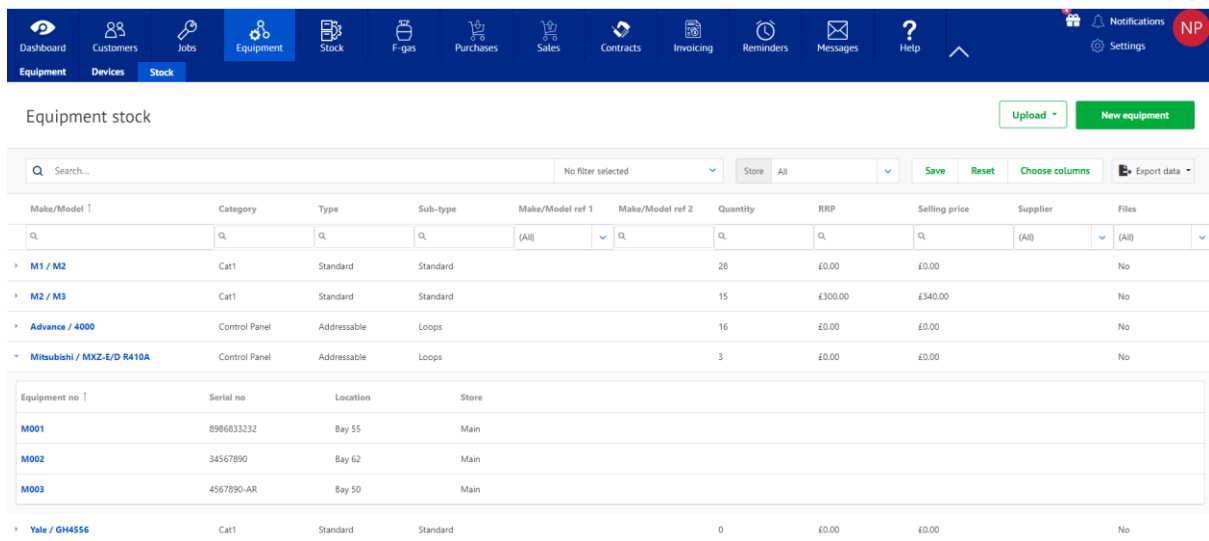
- **Equipment – Store Assignment**

Users can now assign their stock equipment into Stores as they can with parts. If an item of equipment is of a status of 'Stock' then a new field is available called 'Store' (see screenshot below). This new field contains a list of all the Stores, including engineer's vans. By default any existing Stock equipment is assigned into Main Store but this can be changed here simply by selecting another Store and saving the record. Note that in a stock scenario the Location field on the Equipment record can be used to store the Bin or Warehouse location.

- **Equipment – Equipment Stock List**

A new list screen has also been added to make visibility of stock equipment much easier. Equipment now has a second-level navigation to accommodate this. Choose 'Stock' here to see the new list. The list contains all equipment records summarised by Make & Model showing a count quantity. The list can be filtered by Store and Equipment Category. There is also a search bar and the usual column level filtering and sorting. To see the list of

equipment that makes up the count simply click the small arrow alongside the Make Model name. Users can click here to access the specific equipment records if needed.
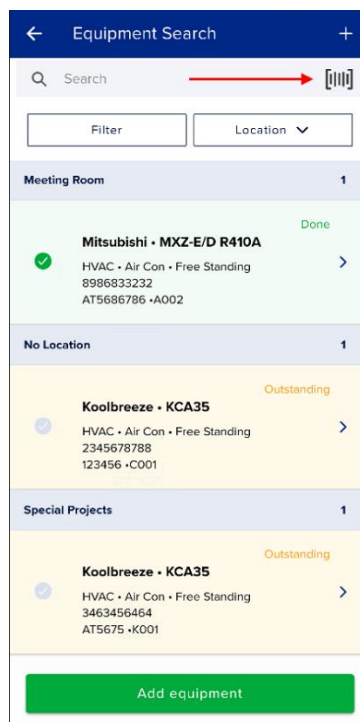

- **Mobile App – Bar Code Searching**

Previously engineers had the ability to search for Parts and Cylinders (if using the F-Gas module) using bar code scanning on the mobile app. This option has now been rolled out to every search screen in the app including:
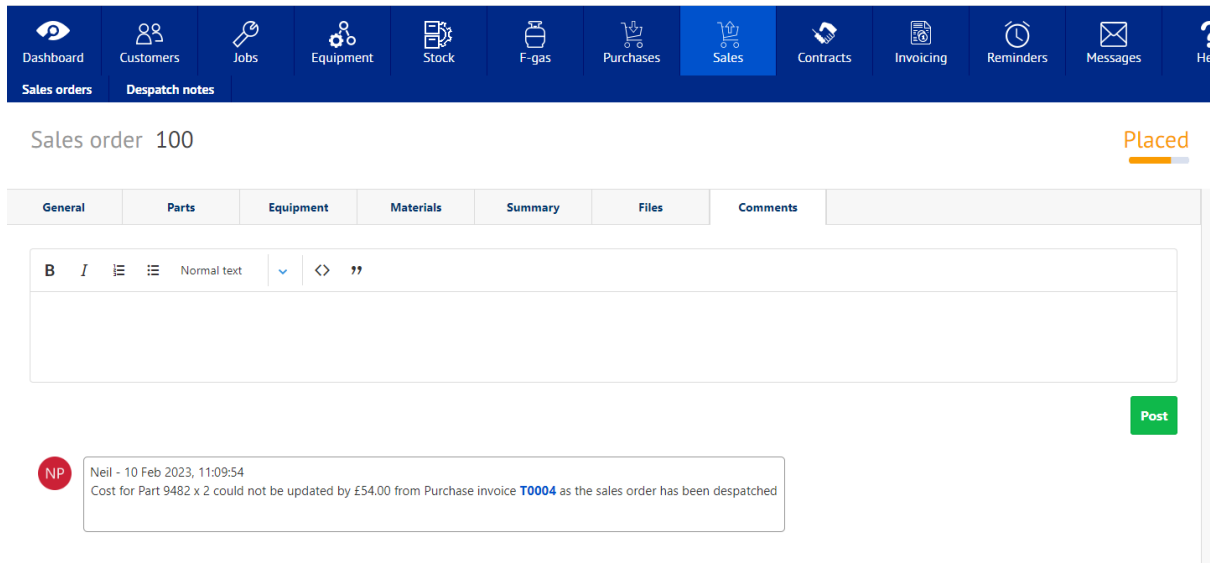
- Equipment List, Add & Create
- Customer List, Quotes & Contacts
- Contact List, Sign Off & Inspection

- **Sales Order – New Comments Tab**

The 'Comments' tab has been rolled out to Sales Orders in this release allowing users to view and record user and time-stamped conversations about a Sales Order. Simply type in your message or note and hit 'Post'.

The system may also post messages here if a user has matched a purchase invoice against a receipt for items sold on this Sales Order and so the cost could not be updated.

- **Files Tab – Manual Editing**

Users can now return to the 'Upload file' form from the 'Files' tab on any screen to edit the description of the file and change the visibility parameters. Use the pencil icon button on the end of each files line to open it for editing.