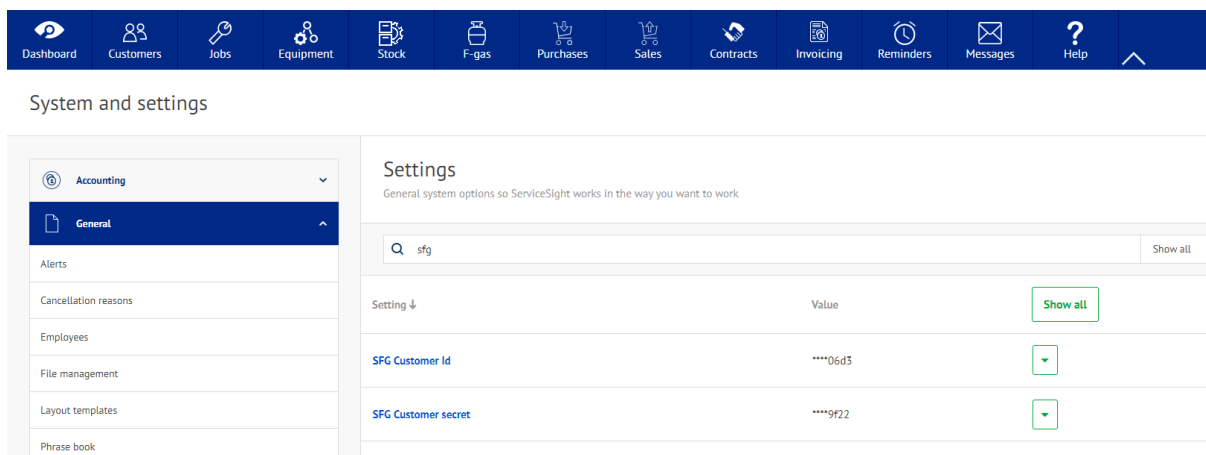


### New Features

- **SFG20 Integration**

Users of SFG20 can now experience a seamless integration with ServiceSight. Simply record your SFG Customer ID and 'secret' code in Settings and you are ready to go.



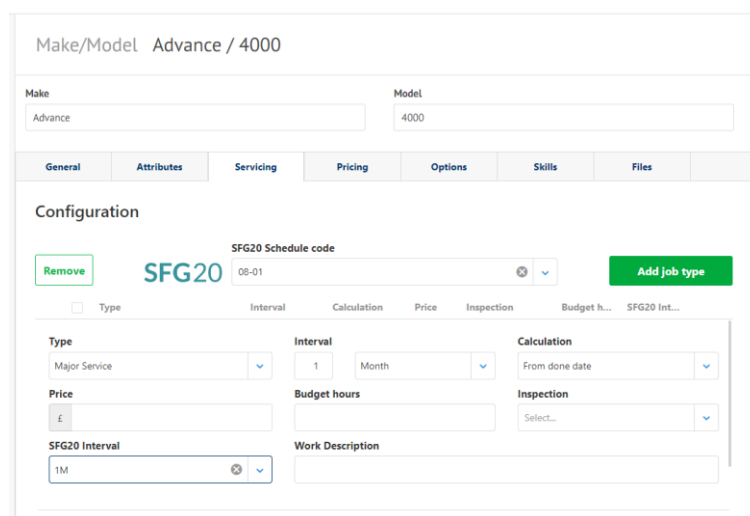
The screenshot shows the ServiceSight dashboard with a navigation bar at the top containing icons for Dashboard, Customers, Jobs, Equipment, Stock, F-gas, Purchases, Sales, Contracts, Invoicing, Reminders, Messages, and Help. Below the navigation bar, the 'System and settings' section is visible. On the left, a sidebar menu shows 'Accounting' and 'General' (selected). The main content area is titled 'Settings' and contains a search bar with 'sfg' entered. Below the search bar is a table of settings:

Setting ↓	Value	
SFG Customer Id	****06d5	▼
SFG Customer secret	****9f22	▼

A 'Show all' button is located to the right of the search bar.

ServiceSight can now access all of the schedules and task lists available via your SFG subscription. You can now link these schedules up to Makes & Models, Equipment & Service Groups.

On the Servicing tab a new field is now displayed called 'SFG20 Schedule code'. This is a drop-down list containing all of your available SFG20 schedules to select from for this type of equipment. Once selected an interval can be chosen against each job type in the service schedule. This provides a link between your own servicing plans and SFG20 so that ServiceSight can present the right schedule to the engineer on them mobile app.



The screenshot shows the configuration page for a specific equipment model, 'Advance / 4000'. The page has tabs for 'General', 'Attributes', 'Servicing', 'Pricing', 'Options', 'Skills', and 'Files'. The 'Servicing' tab is selected. Under the 'Configuration' section, there is a field for 'SFG20 Schedule code' with a value of '08-01' and a green 'Add job type' button. Below this, there is a table with columns for 'Type', 'Interval', 'Calculation', 'Price', 'Inspection', and 'Budget h...'. The 'Type' column has a dropdown menu with 'Major Service' selected. The 'Interval' column has a dropdown menu with '1' and 'Month' selected. The 'Calculation' column has a dropdown menu with 'From done date' selected. The 'Price' column has a text input field with '£' as a prefix. The 'Inspection' column has a dropdown menu with 'Select...' selected. The 'SFG20 Interval' field has a value of '1M' and a dropdown menu. The 'Work Description' field is empty.

A similar process can also be carried out at Equipment level, if there are exceptions to your MakeModel set up and at Service Group level if dealing with large amounts of Equipment.

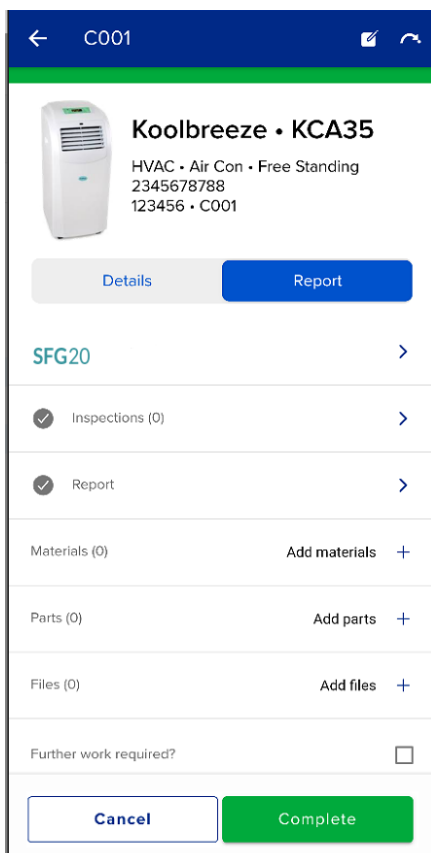
When jobs are raised (either via Recurring Jobs or manually) the SFG20 information will appear automatically for each item of Equipment added. Even if you have not set up the schedules you can still apply an SFG schedule to equipment lines on the job on the Job Equipment tab manually.

Job 10196


Allocated

Details	Equipment ×	Labour	Inspections	Activities	Parts	Materials	Refrigerant	Attributes	Invoicing	Files	Comments	
<input type="button" value="Update status"/> <input type="button" value="Remove"/> <input type="button" value="Add to visit"/> <input type="button" value="Move to new job"/> <input type="button" value="Edit work required"/> <input type="button" value="Choose columns"/> <input type="button" value="Add equipment"/>												
<input type="checkbox"/>	Equipmen... ↓	Make & Mo...	Serial no	Inspection	Further ...	Visit	Files	Price	SFG20 Code	SFG20 Interval	Status	
<input type="checkbox"/>	Temp2	Ford / Kuga		No	No	No		£0.00	02-01	6M	Outstanding	
<input type="checkbox"/>	Temp1	Advance / 4010 cvv		No	No	No		£0.00			Outstanding	

On the mobile app an SFG section has been added to the Equipment detail form allowing the engineer to access the schedule information and tasks. These are pre-filtered to show the correct schedule and interval as specified in ServiceSight. Engineers can also view all of the tasks for an applied schedule if necessary.



← C001

 **Koolbreeze • KCA35**  
 HVAC • Air Con • Free Standing  
 2345678788  
 123456 • C001

Details Report

SFG20 >

✓ Inspections (0) >

✓ Report >

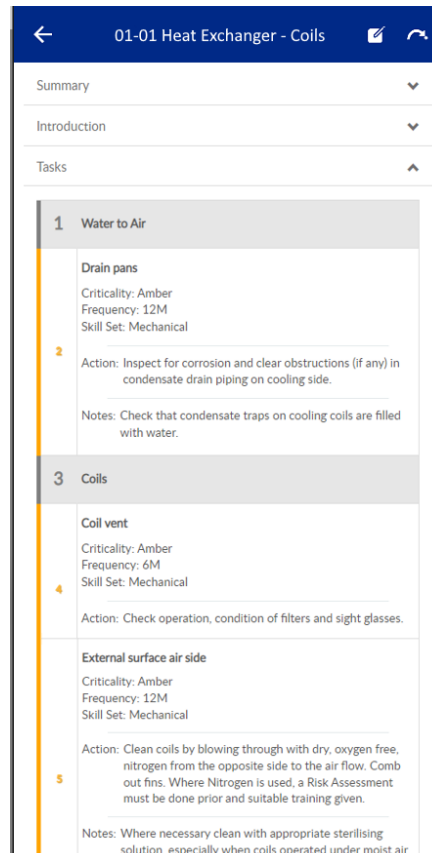
Materials (0) Add materials +

Parts (0) Add parts +

Files (0) Add files +

Further work required?

Cancel Complete



← 01-01 Heat Exchanger - Coils

Summary

Introduction

Tasks

1 Water to Air

Drain pans  
 Criticality: Amber  
 Frequency: 12M  
 Skill Set: Mechanical

2 Action: Inspect for corrosion and clear obstructions (if any) in condensate drain piping on cooling side.  
 Notes: Check that condensate traps on cooling coils are filled with water.

3 Coils

Coil vent  
 Criticality: Amber  
 Frequency: 6M  
 Skill Set: Mechanical

4 Action: Check operation, condition of filters and sight glasses.

External surface air side  
 Criticality: Amber  
 Frequency: 12M  
 Skill Set: Mechanical

5 Action: Clean coils by blowing through with dry, oxygen free, nitrogen from the opposite side to the air flow. Comb out fins. Where Nitrogen is used, a Risk Assessment must be done prior and suitable training given.  
 Notes: Where necessary clean with appropriate sterilising solution, especially when coils operated under moist air

The SFG20 integration is live via APIs so if SFG update a schedule due to legislation changes or any other reason then your ServiceSight will now about it immediately and use the latest versions without any updates or intervention being required.

- **Make Model – In Stock & Supplier Prices Sections Added**

Pro users can now take advantage of increased functionality around holding and managing equipment stock as part of the upcoming Equipment Installation module. On the Make Model screen an 'In stock' section has been added to the General tab to show various balances of this Make Model across different stores.

**In stock** – Count of Equipment of this Make Model with a status of 'Stock'

**Allocated** – Amount of this Make Model allocated on Despatch Notes or Install Jobs







**Available** – = 'In stock' – 'Allocated'

**On PO** – Quantity of this Make Model on open Purchase Orders

**Valuation** – Total of Equipment Value fields on Equipment of this Make Model with a status of 'Stock'

Users can also use the edit button to enter a Min & Max level for each store. For example, in Main Store you might decide that you will always want at least 2 in stock but no more than 10. These values are used in the Equipment Stock Reordering feature coming soon.

If current stock holding transgresses either the Min or Max level then the line appears in red (see screenshot below).

In stock									
Store	Type	In stock	Allocated	Available	On PO	Valuation	Min	Max	
Main		6	0	6	0	£1,310.00	2	10	
<b>B56 ATU</b>		<b>2</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>£1,045.00</b>	<b>3</b>	<b>5</b>	
ABC Stock		1	0	1	0	£0.00	1	1	
<b>Totals</b>		<b>9</b>	<b>0</b>	<b>9</b>	<b>0</b>	<b>£2,355.00</b>			

On the 'Pricing' tab users can now take advantage of being able to specify multiple suppliers for Equipment rather than just one as before. Click 'Add supplier' and select the Supplier you want to add. Then populate the Supplier Part No, RRP, Buying Price. Lead Time and Minimum Order Quantity. You can nominate one Supplier as 'preferred' that is then used as the default Supplier for this Make Model.

Make/Model Advance / 4000

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**Make**

**Model**

---

General
Attributes
Servicing
Pricing
Options
Skills
Files

---

**Sales**

**Recommended retail price (RRP)**

**Selling price**

**Product tax code**

---

**Purchase**

[Remove](#)
[Add supplier](#)

<input type="checkbox"/>	Name	Pre... ↓	Supplier...	RRP	Buying ...	Lead time	Min ord...	On hold	
<input type="checkbox"/>	13	<input checked="" type="checkbox"/>	13123	£495.00	£1,000.00	21 days	1	<input type="checkbox"/>	<a href="#">✎</a>
<input type="checkbox"/>	ABC Ltd	<input type="checkbox"/>	4564564	£500.00	£750.00	7 days	1	<input type="checkbox"/>	<a href="#">✎</a>

[Delete](#)
[Discard](#)
[Save](#)