

New Features

- **Equipment Installations**

For users who sell and install equipment at customer sites we have now introduced a brand-new set of features to enable you carry these jobs out on the system easily.

Previous releases have contained standalone features that are part of this new area of the system. Some weeks ago, we introduced the concept of Equipment stock with a new List screen to show Equipment of status 'Stock' grouped by Make & Model. At the same time, we added a Store field to the Equipment screen (displayed when the item was flagged as a stock item). We also introduced much more user control over the Job form. Unused tabs can be hidden, and the tab order can be set by the user on a per job type or even per job basis. More recently we have enhanced the Make Model screen in Settings to have a Stock balances section, so users can see the quantity held of each Make & Model across their Stores. We have also added the ability to record multiple Supplier and purchasing information used in the creation of Purchase Orders as well as the option to enter minimum and maximum stock holding values for each store.

All these enhancements have made it easier for users to buy and monitor levels of their stock Equipment. This release contains the rest of the enhancements that make up this new Equipment Installation feature.

Equipment Stock Reordering

Stock reordering

Analyse stock history between and Equipment stock Parts stock

Reorder options
 Min Max Demand Forecast

And +

Item	Description	Type	Store	Reason	Supplier	UnitCost	Quantity	Value
1002	Alternator		Main	Demand	Material Supplier	£0.00	20	£0.00
[Make] [Model]	Equipment		Main	Demand	Material Supplier	£0.00	20	£0.00

Order value: £0.00

Discard Raise PO

The Stock reordering screen has been enhanced to include Equipment stock as well as Parts stock. There are toggle buttons on the right to control which records you want to include and the system will default appropriately depending which where you have accessed this screen from.

Users can choose the calculation method – restock to minimum or maximum, include demand and forecasting.

Results will appear in the list and show whether they are Parts or Equipment.

Price Lists

To help support the selling and installing of Equipment in ServiceSight we have added an Equipment tab to the existing Price List form.

Price list Standard

General | **Parts** | Materials | **Equipment** | Refrigerants | Customers

Default price calculation

Calculation type: Percentage:

Exceptions

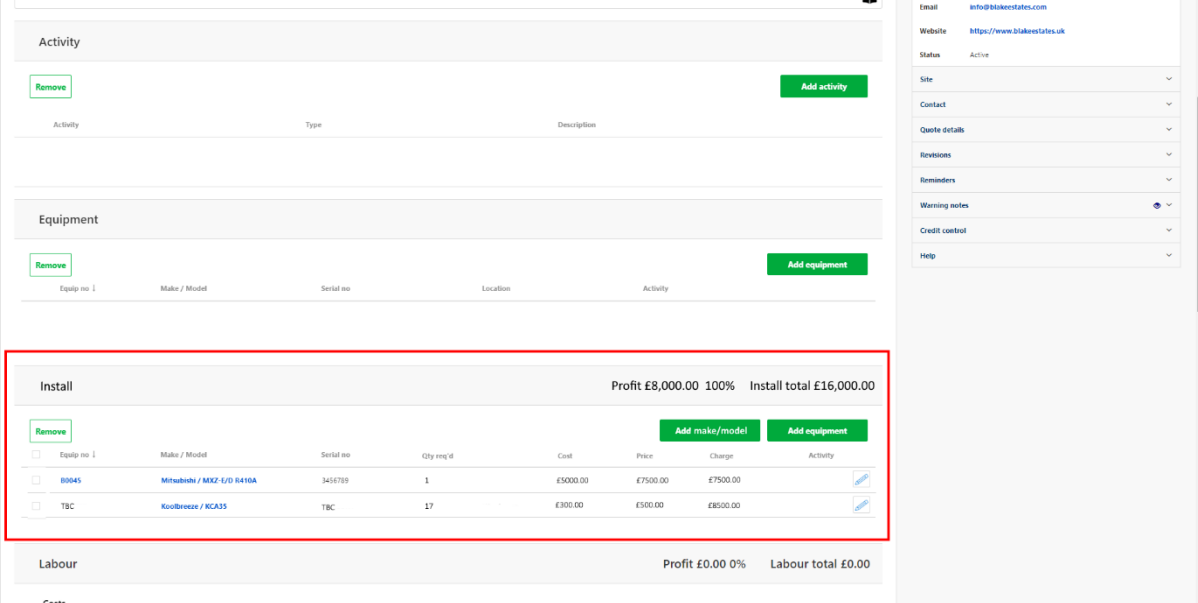
Remove Add make model

<input type="checkbox"/>	Make / Model ↑	Method	Percentage	
<input type="checkbox"/>	Caterpillar / C 7.1	Standard price less %	10.00%	
<input type="checkbox"/>	ADE / MOTOR - Newman C180N/DD84	Standard cost plus %	50.00%	
<input type="checkbox"/>	Atlas Copco / LR110794	Standard price less %	5.00%	

Here users can build price lists for different Customers based on selecting a pricing calculation for a Make & Model. A calculation type can be chosen for all equipment pricing –

standard price less a discount percentage or standard cost plus a percentage. Then any exceptions to that rule can be set up by selecting a Make & Model and assigning its own calculation type & percentage (see above screenshot). On the Customers tab this price list can be linked to the correct customer set, or this can be done via the Customer form itself.

Job Quotes



The screenshot shows the 'Job Quotes' interface. It features three main sections: 'Activity', 'Equipment', and 'Install'. The 'Install' section is highlighted with a red border. To the right of the main form is a sidebar with customer information and various dropdown menus.

Activity Section:

- Buttons: Remove, Add activity
- Table headers: Activity, Type, Description

Equipment Section:

- Buttons: Remove, Add equipment
- Table headers: Equip no, Make / Model, Serial no, Location, Activity

Install Section (highlighted):

- Summary: Profit £8,000.00 100% Install total £16,000.00
- Buttons: Remove, Add make/model, Add equipment
- Table:

Equip no	Make / Model	Serial no	Qty req'd	Cost	Price	Charge	Activity
<input type="checkbox"/> 81045	Mitsubishi / M10Z-1/D R410A	343179	1	£3000.00	£7500.00	£7500.00	
<input type="checkbox"/> TBC	Koolbreeze / KCA35	TBC	17	£300.00	£500.00	£8500.00	

Labour Section:

- Summary: Profit £0.00 0% Labour total £0.00
- Buttons: Remove, Add equipment
- Table headers: Equip no, Make / Model, Serial no, Qty req'd, Cost, Price, Charge, Activity

Costs Section:

- Buttons: Remove, Add equipment
- Table headers: Equip no, Make / Model, Serial no, Qty req'd, Cost, Price, Charge, Activity

Customer Information (Sidebar):

- Email: info@blakesstates.com
- Website: https://www.blakesstates.uk
- Status: Active
- Site: [dropdown]
- Contact: [dropdown]
- Quote details: [dropdown]
- Revisions: [dropdown]
- Reminders: [dropdown]
- Warning notes: [dropdown]
- Credit control: [dropdown]
- Help: [dropdown]


A new 'Install' section has been added to the Job Quote form. Here users can select either stock Equipment records to install, or if the stock is not yet available or assigned, Makes & Models and a quantity. Cost prices will be updated from the either the Equipment record or the Preferred Supplier Buying Price on the Make Model record. Selling prices will use the Price List for the quoted Customer if there is one, or the Selling Price on Make Model record if not. This new section is included in the quote totals & summary areas as normal and appears on the Quotation document when produced. The existing 'Equipment' section is still available on the Job Quote for listing customers equipment to be worked on. The system allows you to include both customer and stock equipment on the same Job if necessary.





Jobs

A new 'Install' tab is now available on the Job form where users can add stock Equipment or Make Model and quantity as required to show the items being installed on this job. Users can include both types of stock equipment on the same job, as can be seen in the screenshot below, and can even also include customers equipment to be worked on, on the existing 'Equipment' tab



Job 10117  

Waiting acceptance 

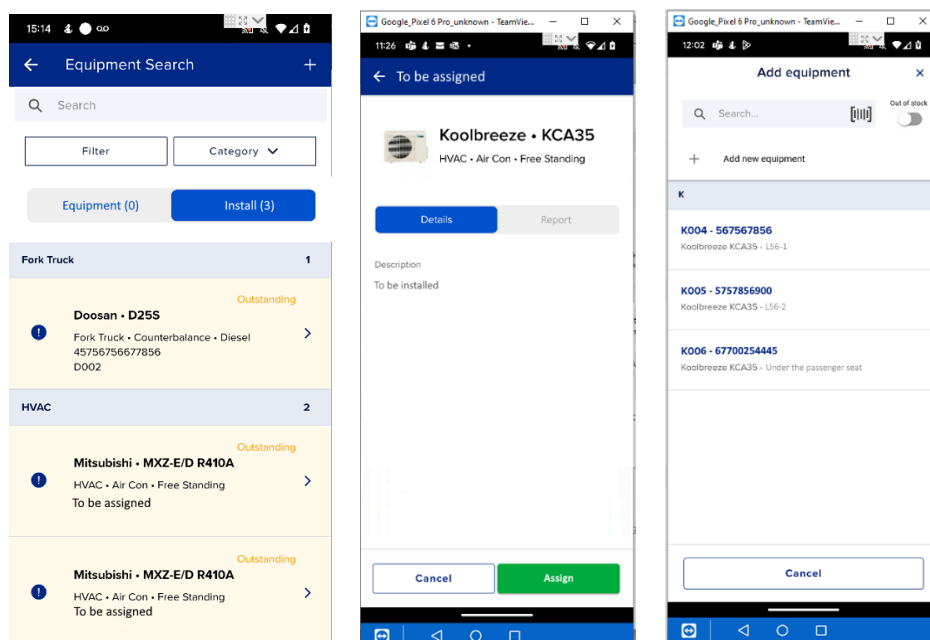
Details	Equipment	Install	Labour	Inspections	Activities	Parts	Materials	Refrigerant	Attributes	Invoicing	Files	Comments
<input type="button" value="Update status"/> <input type="button" value="Remove"/> <input type="button" value="Add to visit"/> <input type="button" value="Move to new job"/> <input type="button" value="Edit work required"/>		<input type="button" value="Add make/model"/> <input type="button" value="Add equipment"/>										
Equipmen...	Make & Model	Serial no	Qty	Added on mobile	Inspection	Further ...	Visit	Files	Cost	Price	Status	
<input type="checkbox"/>	TBC	Caterpillar / 3054C	TBC	1	No	No	1		£0.00	£0.00	Outstanding	
<input type="checkbox"/>	TBC	ADE / MOTOR - Hawk	TBC	2	No	No	1		£0.00	£0.00	Outstanding	
<input type="checkbox"/>	TBC	ADE / MOTOR - Mawc	TBC	5	No	No	1		£0.00	£0.00	Outstanding	
<input type="checkbox"/>	2313872	Make / Model		1	No	No	No		£0.00	£0.00	Outstanding	

To add records to the Install tab simply use either of the two buttons in the top right – ‘Add make/model’ or ‘Add equipment’ and choose from the lists that appear. When the items are added to the job users can enter a work description as normal. If you choose to add MakeModel records then the edit button will enable you to enter the correct quantity to be installed by the engineer.

Equipment to be installed can still be pre-assigned to a labour visit if desired, removed, moved to a new job, or have its work description edited, all as you would do for customers equipment currently.

Mobile App


As with Jobs in the Web App, Jobs in the Mobile App also now have an Install tab. It is only enabled if items have been added to the Install tab on the Job in the Web App and shows both stock equipment lines and the correct quantity of MakeModel lines.



Equipment stock items can be updated and 'Completed' in the same way as existing customers equipment. When installing MakeModel lines the engineer can go into the detail form as usual (see centre screenshot above). Instead of a 'Complete' button the engineer is prompted to use the 'Assign' button. This will open a list of stock equipment in the engineer's store that matches the MakeModel of the item to install. Once assigned the missing Equipment information is added automatically. Note that engineers can create new Equipment at this point if necessary.

This newly assigned Equipment can then be 'Completed' in the normal way once installed. This causes the system to remove a MakeModel line from the Job and add an Equipment line instead. Back in the Web App, the quantity of the MakeModel line is reduced and the actual Equipment item installed is added to the Install tab so that progress on large install jobs can be monitored easily. When the visit is completed on the mobile, the status of the Equipment record is also changed from 'Stock' to 'Sold'.

Both the Job Sheet & Job Invoice layouts have been updated to include installed equipment if any have been added to the job, otherwise this new section is hidden. If there is only installed equipment to show then the existing customer's equipment section is hidden instead.



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Job Site

2Sageworks

Job Sheet			Page
Job Number	10117	Reference	1 of 1
Logged	15/05/2023	Job Type	Call Out
Contact		Tel.	07541 339707

Equipment to Install

Make / Model	Qty	Visit	Status
Make / Model <i>Cat 1 / Standard / Standard</i>	1	-	Outstanding
Caterpillar / 3054C <i>Generator / Diesel / Standard</i>	1	1	Outstanding
ADE / MOTOR - Hawker Siddley CF200L <i>Motor / Standard / Standard</i>	2	1	Outstanding
ADE / MOTOR - Mawdsley <i>Motor / Standard / Standard</i>	5	1	Outstanding

Labour Visits

Visit	Engineer	Date	On	Off	Hours	Travel
1	Billy the Engineer	23/05/2023				00:00

Engineer Report

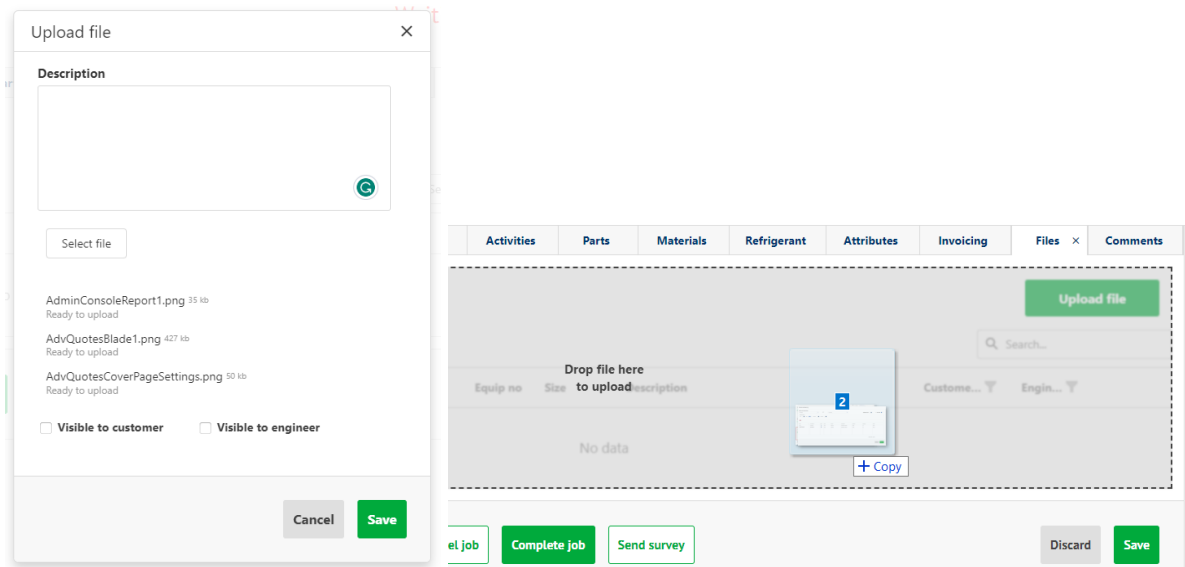
Materials

Parts needed for the repair

Additional expenses

- **Files Tab – Improvements including ‘Drag & Drop’**

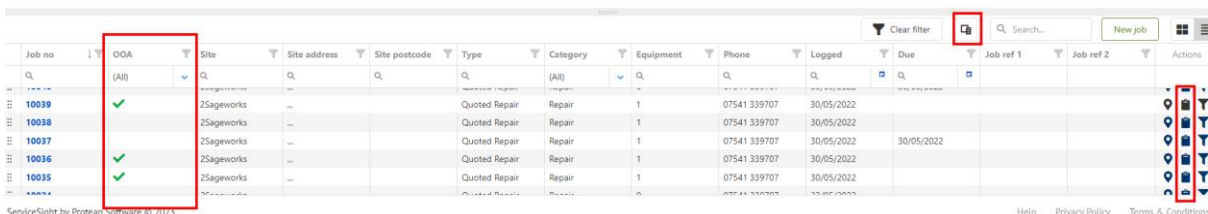
The Files tabs that appear throughout the system have been enhanced to allow for multiple file selection. This can be done by clicking the ‘Upload file’ button and then the ‘Select file’ button on the Upload form that appears, in the usual way. Now simply select the files you want to upload, and they are added to the form.



Alternatively, users can simply drag and drop files to upload into the Files tab. Again, multiple file selection is supported.

- **Planner – Support for Equipment Out of Action**

Users taking advantage of the recent addition of Equipment Conditions and the Out of Action features can now also access this information in the Planner.



An OOA column has been added to the column chooser in the list of jobs at the bottom of the Planner that will indicate if there are equipment on the jobs that are assigned a condition that has been flagged as ‘out of action’.

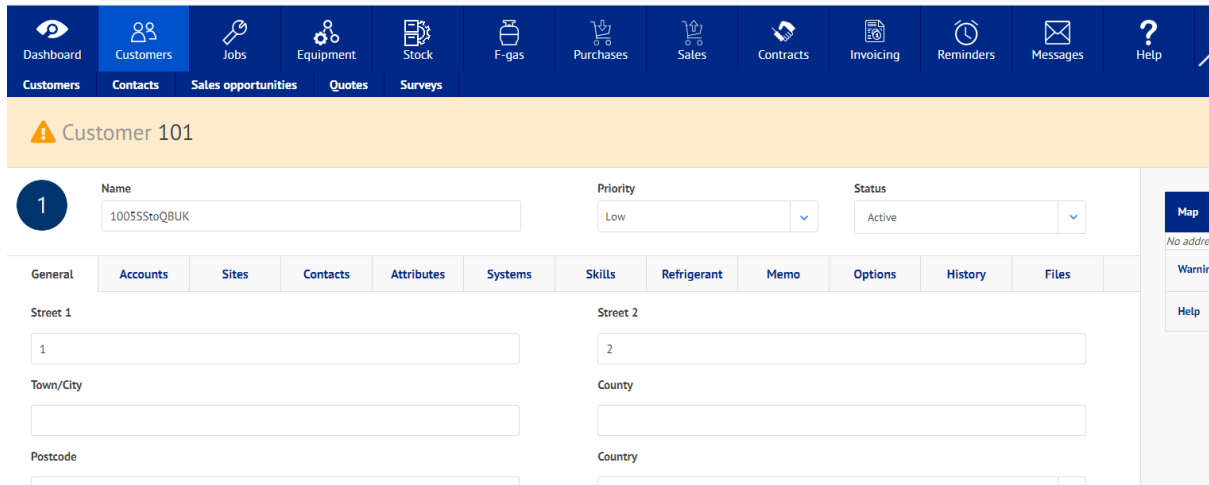
To see the details of which equipment has been flagged as out of action, or to view any equipment conditions users can click on the clipboard icon in the list to open the job details window.

Job 10082 2Sageworks ✕

Equipment no	Work required
1324	Will not work. Check if needs replacing
2317973	Making a funny noise
211424	A bit fell off yesterday

- **Customers – Improved On Stop Visibility**











To aid the visibility of customers that have been put on stop, several changes have been made on the customer form and the job, contract and sales order forms.



The screenshot shows the Service Sight interface 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 is a yellow banner with a warning icon and the text "Customer 101". The main form area shows a customer profile for "10055StoQBUK" with fields for Name, Priority (Low), and Status (Active). The form is divided into sections: General, Accounts, Sites, Contacts, Attributes, Systems, Skills, Refrigerant, Memo, Options, History, and Files. The General section includes fields for Street 1, Street 2, Town/City, Postcode, and Country.

If a customer is on stop then on the customer form a banner is shown at the top of the form with a yellow warning triangle.

When users create a new job (or contract or sales order) the customer drop-down list now highlights any customers on stop, or over their credit limit. In this way, users are aware before they even select the customer for a chargeable transaction. This new information is also available in the accordion so it can be checked at any point.

Details	Equipment	Labour	Inspections	Activities	Parts	Materials	Refrigerant	Attributes	Invoicing	Files	Comments	
Customer				+ New customer				Site				+ New site
Blake Estates				↓				Blake Estates				↓
	Katie Ltd		1130 Elliott Court,Herald Avenue,Coventry,CV5 6UB						Active			
	Blake Estates		1 Lyons Drive,Allesley,Coventry,West Midlands.						Active			
	TJ Jones Ltd		Unit 1,London Road,Coventry,West Midlands,CV3 4RP						On stop			
	SPS		Lynchgate House,Lynchgate Road,Coventry,West Midlands,CV4 7EH						Active			
	Fast Restore		1 Kenthurst Close,Eastern Green,Coventry,West Midlands,CV5 7EA						Active			
	The Maker Man		Cornwall House,Blythe Gate,Solihull,West Midlands,B90 8AF						On stop			
	A1 Ltd		1 Holbrook Lane,Holbrooks,Coventry,West Midlands,CV6 4BY						On stop			
	JDW Ltd		Gallagher Business Park,Gallagher House,Warwick,CV34 6AF						Active			
	DJ Johnson		Blythe Valley Park,Nelson House Central Boulevard,Solihull,West Midlands,B90 8BG						Active			
	The Exchange		2440 The Crescent,Birmingham Business Park,Birmingham,West Midlands,B37 7YE						Over credit limit			

- **Further Roll-Out of Comments Tabs**

The useful Comments tab functionality has now been added to the Equipment, Stock Part, Contract and Sales Opportunity forms. This allows users to leave user and timestamped notes against these important operational areas.

- **Layout Templates – Sales Order Acknowledgement Added**

The Sales Order Acknowledgement document has been added to the list of available layouts for customising in the Layout Designer in the Settings menu.

- **Sales Order – Ability to Invoice to Account Unrelated to Site**

Users can now take advantage of increased flexibility on the Sales Order form. Once a Site has been selected on a Sales Order users can now change the Customer account to one not linked to the Site account. A confirmation message is displayed to the user to proceed with the change.