

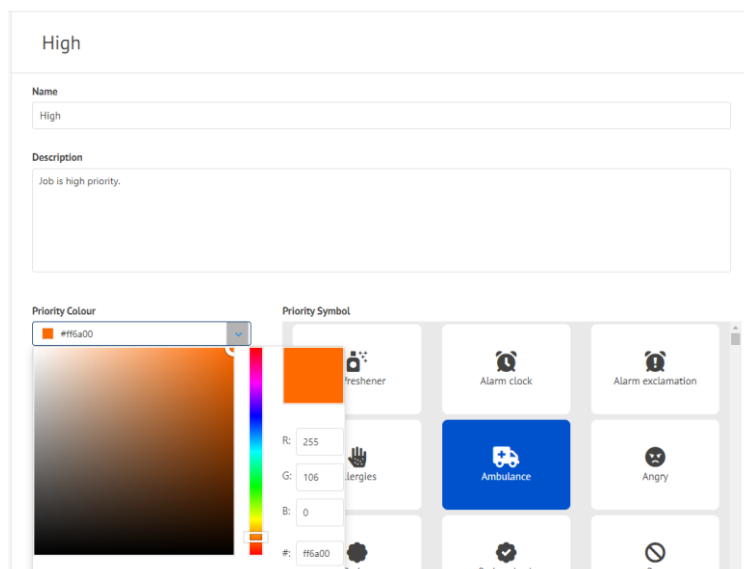
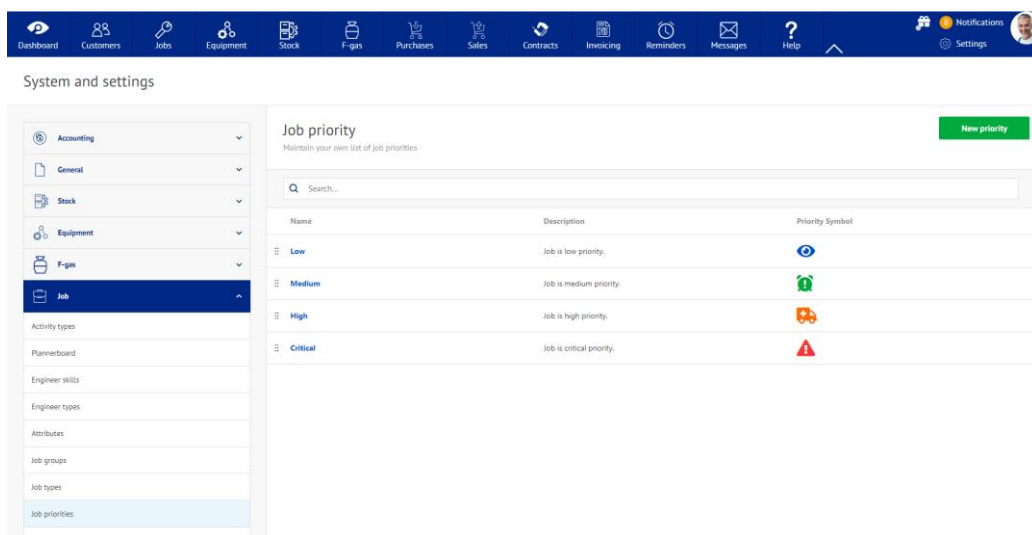
New Features

- **Job Priority**

Users can now set up bespoke priority levels in the system, apply them to customers, to act as defaults and jobs. Priorities can be escalated or edited as needed on a job. The priority appear in the jobs list and in the planner

Setting Up

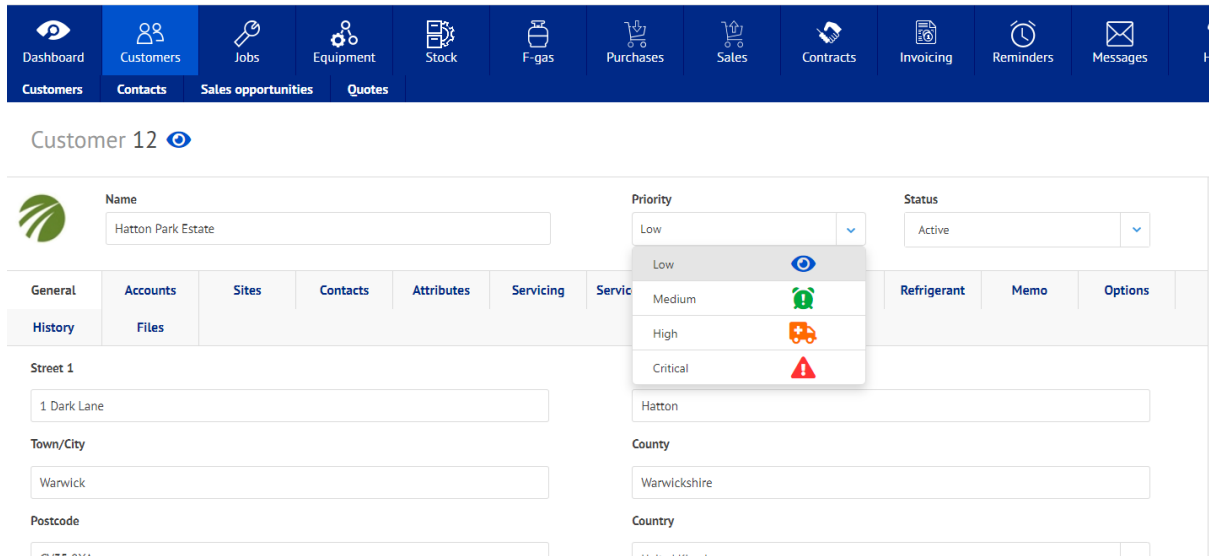
In Settings/Job/Job Priorities on the menu users can edit or add to the default list of job priorities – low, medium, high or critical. Users can edit the name, description, colour, icon (with hundreds to choose from) & order of any of the priorities, or add their own into the list. You can have as many priorities as you like.



When you have the priorities, you need you can assign them to customers & sites, to act as defaults when creating jobs for these customers.

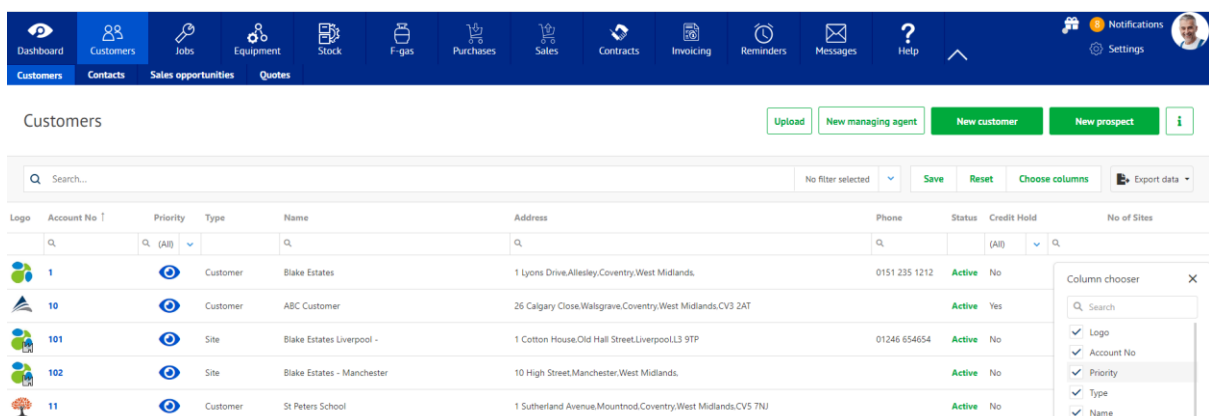
Customer & Customer List

A new field has been added to the Customer form called 'Priority'.



The screenshot shows the 'Customer 12' form. The 'Priority' dropdown menu is open, showing options: Low (with an eye icon), Medium (with a green exclamation mark icon), High (with a red truck icon), and Critical (with a red warning triangle icon). The form fields include Name (Hatton Park Estate), Status (Active), and various tabs like General, Accounts, Sites, etc.

Simply use the drop-down list to choose the default job priority for this customer or site. The icon appears next to the Customer account number for reference purposes. You can also add this icon to the Customer List if you wish. Go to the Customer List and use the 'Column chooser' button to select 'Priority'. You can then drag it into your desired position and use the 'Save' button to persist the addition.

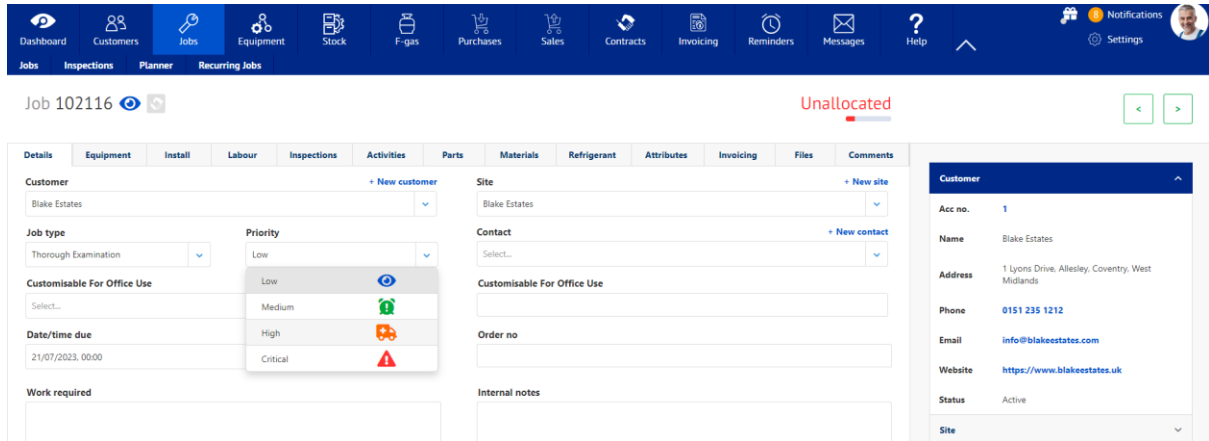


The screenshot shows the 'Customers' list with a table of customer records. A 'Column chooser' dialog is open on the right, showing a list of columns to be displayed in the table. The 'Priority' column is checked.


Logo	Account No	Priority	Type	Name	Address	Phone	Status	Credit Hold	No of Sites
	1		Customer	Blake Estates	1 Lyons Drive,Allesley,Coventry,West Midlands.	0151 235 1212	Active	No	
	10		Customer	ABC Customer	26 Calgavy Close,Walsgrave,Coventry,West Midlands,CV3 2AT		Active	Yes	
	101		Site	Blake Estates Liverpool -	1 Cotton House,Old Hall Street,Liverpool,L3 9TP	01246 654654	Active	No	
	102		Site	Blake Estates - Manchester	10 High Street,Manchester,West Midlands.		Active	No	
	11		Customer	St Peters School	1 Sutherland Avenue,Mountnood,Coventry,West Midlands,CV5 7NJ		Active	No	

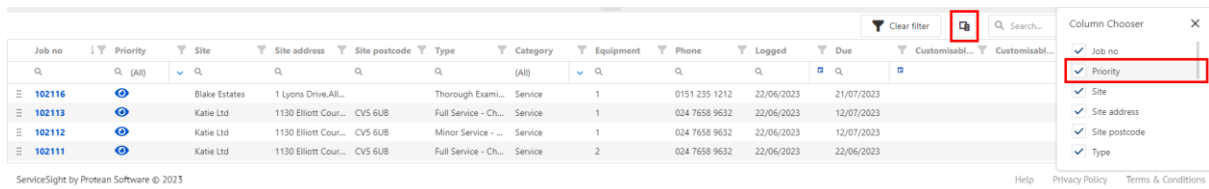
Jobs & Job List

The job form also has a 'Priority' field. The job priority will default from the Customer/Site selected but users can change the priority on a job as needed. As with Customers, the icon is displayed by the job number for clarity. You can also add this icon to the Jobs List if you wish. Go to the Jobs List and use the 'Column chooser' button to select 'Priority'. You can then drag it into your desired position and use the 'Save' button to persist the addition.



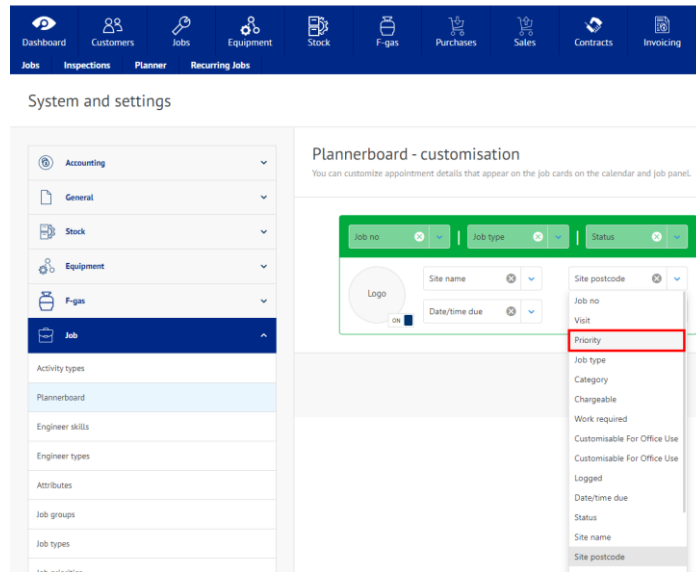
Planner

Obviously the most useful place to see job priority is on the planner when allocating work out to engineers. You can add the priority icon column to the list of jobs by using the  button open the column chooser and selecting 'Priority'. Drag it into position and use the 'Save layout' button to persist your changes. You can now sort and filter by priority.



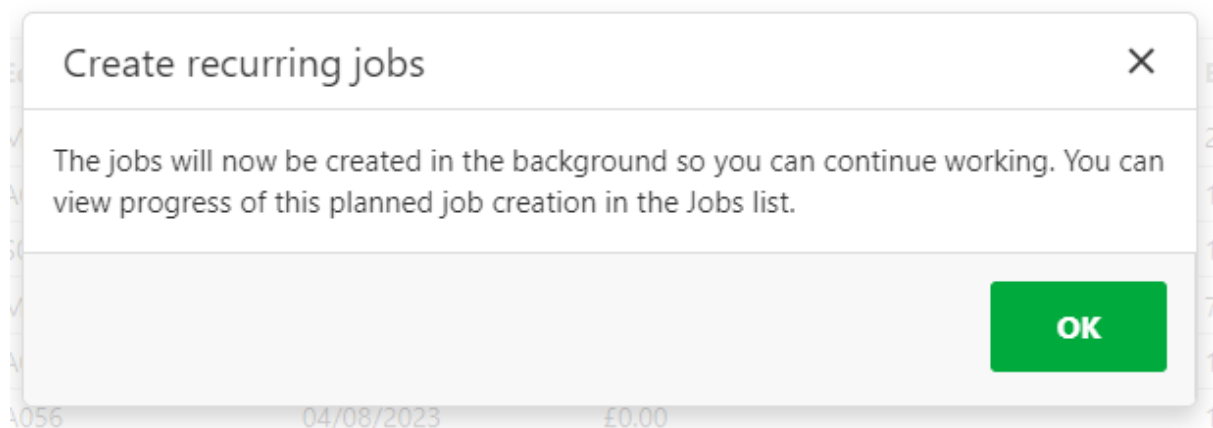
Job no	Priority	Site	Site address	Site postcode	Type	Category	Equipment	Phone	Logged	Due
102116	👁️	Blake Estates	1 Lyons Drive, All...		Thorough Exam...	Service	1	0151 235 1212	22/06/2023	21/07/2023
102113	👁️	Katie Ltd	1130 Elliott Cour...	CV5 6UB	Full Service - Ch...	Service	1	024 7658 9632	22/06/2023	12/07/2023
102112	👁️	Katie Ltd	1130 Elliott Cour...	CV5 6UB	Minor Service - ...	Service	1	024 7658 9632	22/06/2023	12/07/2023
102111	👁️	Katie Ltd	1130 Elliott Cour...	CV5 6UB	Full Service - Ch...	Service	2	024 7658 9632	22/06/2023	22/06/2023

You can also add the priority to the job cards themselves in the calendar. Go to Settings/Job/Plannerboard. You will see a representation of the job card. You can select 'Priority' from any of the drop-down lists to choose where on the card you which to display this information.



- **Recurring Jobs – Improved User Experience**

To improve the user experience when running recurring jobs through the user-interface, the system, when a run is committed, will now inform you that you can carry on working while this runs in the background or you can monitor progress on a new screen, which opens automatically for you. This screen will show you the progress of the run and will actually show the jobs appearing as they are created.



Jobs 7/17 Running

New job

Job no	Priority	Job group	Type	Site	Phone	Eq...	ODA	Engineer	Logged	Due	Status	Order status	Total charge	Customisable For ...	Customisable For
102133	🔍	Service	Full Service	Cannon Hill Ltd	024 7685 2741	0			22/06/2023	17/08/2023	Entry		£0.00		
102132	🔍	Service	Full Service ...	Katie Ltd	024 7658 9632	5			22/06/2023	16/08/2023	Entry		£5.00		
102129	🔍	Service	Minor Service	SPS		1			22/06/2023	10/08/2023	Entry		£30.00		
102128	🔍	Service	LOLER	SPS		2		NP	22/06/2023	09/08/2023	Waiting acceptance		£243.00		
102127	🔍	Service	Minor Service	Coventry Garage		1		NP	22/06/2023	07/08/2023	Waiting acceptance		£43.00		
102125	🔍	Service	Minor Service	Blake Estates	0151 235 1212	1			22/06/2023	04/08/2023	Entry		£5.00		
102124	🔍	Service	Full Service	Hatton Park Estate		1			22/06/2023	04/08/2023	Entry		£5.00		

The list refreshes automatically every 5 seconds to show the latest position. When the run is finished the list status will be updated so that users know the routine has finished successfully

Jobs 17/17 Finished

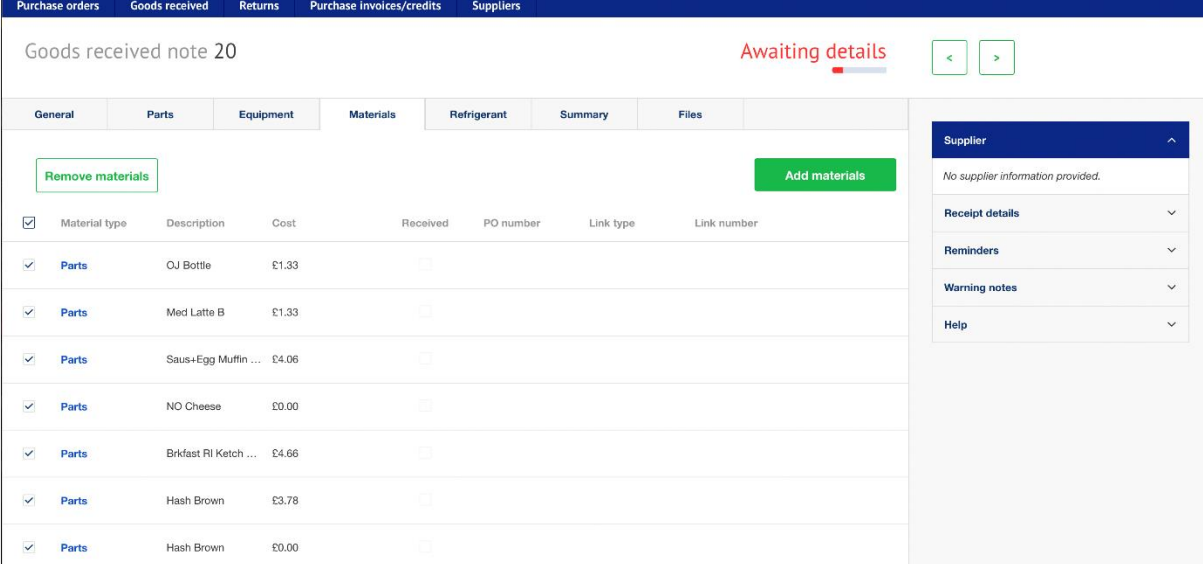
New job

- **Engineer Expenses**

An exciting new development now allows engineers on the mobile app to take photos of any receipts from purchases they have made while working – whether it be car parking, meals, hotels and any other expense. These photos can be taken within jobs to allow the items to be costed and charged to a specific job or from the main menu when not related to a particular job. That's it, the engineer takes a photo, and the system will do the rest!



In the office system a GRN is created and the data that is read off the receipt photos is applied. Sometimes a Supplier match cannot be determined and so this will be blank on the GRN for the users in the office to supply – a copy of the photo is attached to the GRN automatically for reference. All the lines that could be read will be populated as Material lines on the GRN and if possible linked to the Job in question.



The screenshot displays the 'Goods received note 20' interface. At the top, there are navigation tabs: 'Purchase orders', 'Goods received', 'Returns', 'Purchase invoices/credits', and 'Suppliers'. The main header shows 'Goods received note 20' and 'Awaiting details' with navigation arrows. Below the header is a tabbed interface with 'Materials' selected. A table lists material lines with columns for 'Material type', 'Description', 'Cost', 'Received', 'PO number', 'Link type', and 'Link number'. A 'Remove materials' button is on the left and an 'Add materials' button is on the right. A sidebar on the right contains a 'Supplier' dropdown menu with options: 'No supplier information provided.', 'Receipt details', 'Reminders', 'Warning notes', and 'Help'.

Material type	Description	Cost	Received	PO number	Link type	Link number
Parts	OJ Bottle	£1.33	<input type="checkbox"/>			
Parts	Med Latte B	£1.33	<input type="checkbox"/>			
Parts	Saus+Egg Muffin ...	£4.06	<input type="checkbox"/>			
Parts	NO Cheese	£0.00	<input type="checkbox"/>			
Parts	Brkfast RI Ketchch ...	£4.66	<input type="checkbox"/>			
Parts	Hash Brown	£3.78	<input type="checkbox"/>			
Parts	Hash Brown	£0.00	<input type="checkbox"/>			

Users can tidy & edit the lines as needed, and link the Material lines on the GRN to specific Material lines on the job if desired. These GRNs can then be matched to Supplier invoices, credit card statements and so on to provide a proper paper trail – without the paper.

The system that 'reads' the receipts uses machine learning to improve its abilities and so will get better at understanding your common types of receipt. We can enforce or speed up its learning if users wish to supply receipts for us to use.

The option to add expenses will be rolled out to the mobile app over the next few days, you'll see it on the main menu and on the Job Report menu beneath 'Files'.