

Service Manager

SOFTWARE

This document contains summary information on new features, late-breaking product information, updates, and troubleshooting tips not covered in the Trimble® Service Manager documentation.

Introduction

These release notes describe the features and enhancements that are new in version 15.4.0.200 of Service Manager, for the following components only:

- Service Manager Desktop
- Service Manager Web Portal
- Service Manager Engineer

For further support information, go to <http://mep.trimble.co.uk/support>.

New features and changes

The improvements that have been made to the Service Manager software are summarised in the following table.

Upgrade procedure

Updates will be made available and automatically downloaded via Trimble LiveUpdate.

Version: 15.4.0
Date: 2017
Month: January

ENHANCEMENTS AND FEATURES	
Jira ID	Description
SERVMAN-994	The Web Portal version number is now displayed on the Admin page
SERVMAN-992	Costs added to a job through the desktop application may be allocated to a mobile visit where an engineer has forgotten to do so whilst on site
SERVMAN-958	The Job Type Description may now be selected as a column in the Planner Data Grid Screen
SERVMAN-785	The 'Smg Cat Ref' field against Equipment items has been relabeled to 'SFG20 Cat Ref'
SERVMAN-784	The Equipment details have now been extended within the tasks screen on Service Manager Engineer to include Model, Serial and Asset Numbers and SFG Cat Ref fields
SERVMAN-462	The notes column on the 'View Jobs' screen of the Customer Web Portal is now a fixed width to improve the user experience on lower resolution monitors
SERVMAN-318	Asset tag information is now shown (if defined) against equipment items in the 'View Job' screen of the Customer Portal
SERVMAN-315	Asset tag information is now shown (if defined) against equipment items in the 'View Job' screen of the Engineer Portal
SERVMAN-85	A new option has been added so that the user is prompted to send the job to the engineers mobile device when saving a visit (Shared Settings / Mobile Settings / Prompt to send unspent jobs)

BUG FIXES	
Jira ID	Description
SERVMAN-1094	Resolved an issue within Contract Renewals that misscheduled services if the start date of the contract is set to 01/01/2017
SERVMAN-1068	The site address in Costing is no longer removed if the Description field of a Contract within Service Manager is updated
SERVMAN-1067	The 'Contract KPI Breakdown Report' has been updated so that unwanted sites are not shown
SERVMAN-1059	The toolbar options on the 'Plan Site Visit' screen now display correctly
SERVMAN-1055	Validation added to the mileage field in Service Manager Engineer to prevent a Null Exception error
SERVMAN-1034	Dragging a visit on the planner to a new timeslot now updates the Visit Start Date Time
SERVMAN-1033	Resolved an issue where jobs could be sent to an engineer's device without a Contract or Site being assigned
SERVMAN-1013	Fixes an issue where incorrect Contracts were displayed on the Customer Web Portal
SERVMAN-1011	Improves the stability of web user creation for Contracts with a large number of Sites

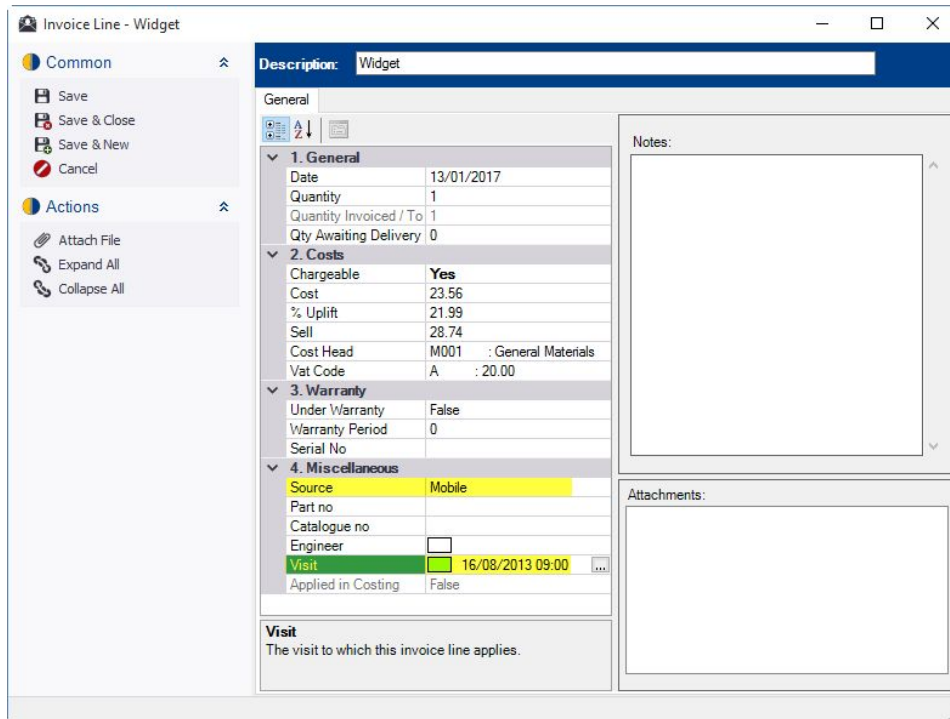
SERVMAN-1009	Additional fields have been added to the 'Print Physical Visits' report to allow Material costs from mobile and signature details to be added to the template
SERVMAN-1008	Using the 'Ctrl+F' function multiple times in the jobs screen no longer shows duplicate results
SERVMAN-1007	Resolves an issue that could prevent attachments on Jobs from being uploaded to the Customer Web Portal
SERVMAN-996	It is no longer possible to save the settings within the Service Manager Engineer app before it has finished a sync
SERVMAN-982	Milage is now shown in the Labour and Expense grid instead of the Materials grid of the Draft Sales Invoice created within Costing
SERVMAN-967	When transferring a cost line from one job to the other the change is now correctly reflected against the job in Costing
SERVMAN-959	Addresses an issue that could cause the Engineer app licences to be revoked
SERVMAN-957	Improves reliability of data synchronisations to the Engineer app
SERVMAN-951	Fixes an issue that could result in an error being displayed when transferring a Quote to a Job
SERVMAN-943	The 'Add Line Item' screen within Service Manager Engineer has been refactored to simplify its use
SERVMAN-905	A new system option has been added to disable the legacy mobile server options (Shared Settings / Mobile Settings / Use Amtech Mobile Server Settings)
SERVMAN-904	Resolves an issue that prevented Quotes from being opened if no labour cost line exists
SERVMAN-882	Launching Service Manager no longer marks a FastTest licence as being in use
SERVMAN-842	Jobs changed to a status that is marked as 'Is Mobile Job Complete? = True' in the desktop application are now removed from Engineers Mobile device
SERVMAN-740	Fixed an issue that prevented Pay Element descriptions from being displayed in the Engineer Timesheet routine
SERVMAN-738	Corrected a spelling mistake on the Web Portal Uninstall wizard "Equivalent"
SERVMAN-723	Rectified an issue that could result in a PPM Invoice being duplicated when edited in the 'PPM Invoice Generation' wizard
SERVMAN-401	Customers are no longer able to log a job through the Customer Web Portal to a site that is flagged as inactive
SERVMAN-241	The 'Invoice Live Source' for Mileage costs on a job that have been created from Service Manager Engineer is now shown as 'Mobile'
SERVMAN-240	The 'Invoice Live Source' for Labour costs on a job that have been created from Service Manager Engineer is now shown as 'Mobile'

New feature details

SERVMAN-992 – Allocate costs to a mobile visit

Additional material costs may be added through the desktop software to a specific site visit, these costs will then be included on the Visit Worksheet report for that visit.

When adding an item the source can be changed from 'Desktop' to 'Mobile' and then a specific Visit can be selected.





These details may also be updated on existing items in the costs grid.

Chargeable	Job Chargeable	C/H	Cat. No	P/N	Warranty Item	Invoiced	Invoice date	Qty Invoiced	InvoiceLine Source	Visit	Vat Code
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	M001	: General Mater...		<input type="checkbox"/>	<input type="checkbox"/>		1.00	Mobile	16/08/2013 09:00	A : 20...

New feature details

SERVMAN-784 – SM Engineer equipment details on a task

The Equipment details against Tasks on the Service Manager Engineer app have been extended to enable engineers to better identify an item.

NAME Refrigerated Gondola #1	ASSET NO AST001	 
MODEL ABC123	SERIAL NO 9527695335	
LOCATION Sales Area	HOURS 0.5	

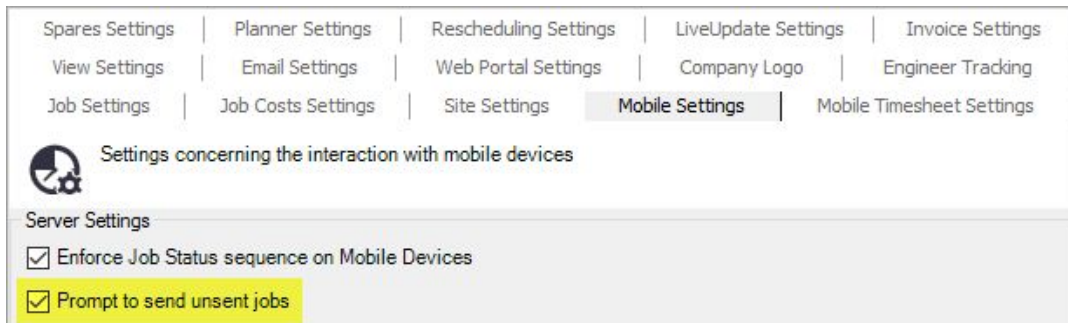
Clicking on to a Task will extend the detail further to show the 'Location Text' and 'SFG20' fields.

NAME Refrigerated Gondola #1	ASSET NO AST001	 
MODEL ABC123	SERIAL NO 9527695335	
LOCATION Sales Area	HOURS 0.5	
LOCATION TEXT End of Aisle #1		
SFG20 G21		

New feature details

SERVMAN-85 – Prompt to send jobs to mobile

A new setting has been introduced within the 'Shared Settings / Mobile Settings' tab which, when enabled, will prompt users to send a visit to the assigned engineers mobile device the visit is created and saved.



The prompt to send will display when creating a visit in the following circumstances:

1. Right click on planner and choose new job.
2. Select job or jobs in the grid below the planner, right click on the planner and choose plan selected job(s) - should prompt for each job being planned.
3. Drag and drop job or jobs from grid below the planner - should prompt for each job being planned.
4. Right click an existing job and choose Split Visit - job will be sent based on the new visit - no check is made on the existing visit to see if the job has been sent.
5. Create a visit for more than one engineer. A linked visit will be created across those engineers. Right click the visit for one engineer and choose unlink resource. A new visit will be created for that resource. No check is made on the existing visit to see if the job has been sent.

Legal notices

Trimble Navigation Limited
MEP Division
10368 Westmoor Drive
Westminster, Colorado 800021
USA
800-361-1249 (toll free in USA)
+1-937-245-5154 Phone
+1-937-233-9441 Fax
www.trimble.com

Copyright and trademarks

© 2016, Trimble Navigation Limited. All rights reserved.

Trimble, and the Globe & Triangle logo are trademarks of Trimble Navigation Limited, registered in the United States and in other countries.

Microsoft and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. All other trademarks are the property of their respective owners.

Release notice

This is the January 2017 release (Revision A) of the Release Notes. It applies to version 15.4.0 of the Service Manager software.