



ServiceWare Resources for iPhone

Release notes 8.4.0

Serviceware Resources for iPhone 8.4.0

Introduction

This document describes the changes for the Serviceware Resources for iPhone app, version 8.4.0.

This version introduces enhanced support for managing session appointments from a mobile device. It now includes almost all registration options familiar to users when handling appointments planned on one of the classic planning boards. Only label printing is not possible yet for session appointments.

Additionally, we provide functionalities for seamlessly replacing a widget order with the actual client order and easily adding a new appointment to the session agenda.

Also new this version is the option to activate a check that alerts users when scanning a particular barcode for the second time on the same day. And the possibility to make phone calls from within the app anonymously.

Finally, several minor improvements have been implemented, and a few bugs have been resolved. Please refer to Chapter 2 for a detailed overview.

This version also includes a large technical change in the underlying development framework. For technical notes please see chapter 3 for more information.

We hope you will enjoy using this new version of Serviceware Resources for iPhone and we would like to hear your feedback. You can send this by email (service@serviceware-benelux.com) or use our support phone number: 0031 (0)71-5680310.

Leiden, March 20th, 2024

Serviceware Benelux

Part of Serviceware SE

Table of contents

- 1 New functionality 4
 - 1.1 Advanced support of session appointments on mobile 4
 - 1.1.1 Recognize sessions better in the main agenda 4
 - 1.1.2 Start/Stop registration of the session itself from within the session page 4
 - 1.1.3 Advanced registration: barcodes, forms and attachments 5
 - 1.1.4 In-flow actions for session appointments 6
 - 1.1.5 Replace an appointment widget order with an actual order of the client 6
 - 1.1.6 Add a walk-in client to the current session using their actual order 7
 - 1.1.7 View details of the session and the (parent) location 8
 - 1.2 Check if scanned barcode is used already today in other appointments 9
 - 1.3 Make anonymous calls..... 10
- 2 Improvements & Bugfixes 11
 - 2.1 Order number shown in agenda when expanding the appointment 11
 - 2.2 Room indicator ‘K1’ removed at location appointments..... 11
 - 2.3 Show 'registered' clock in red when registration state is 'Failed' 11
 - 2.4 Client & order search improvements 12
 - 2.4.1 Search client: selecting a single found client automatically 12
 - 2.4.2 Search client: no ‘nearby clients’ when searching from within a session 12
 - 2.4.3 Search order: subject & external number shown when choosing an order 12
 - 2.5 Dynamic forms fixes..... 12
 - 2.5.1 The ‘Is of multiple birth’ property now also accessible in dynamic forms 12
- 3 Technical Changes 13
- 4 Installation requirements 14

ServiceWare Resources for iPhone 8.4.0

1 New functionality

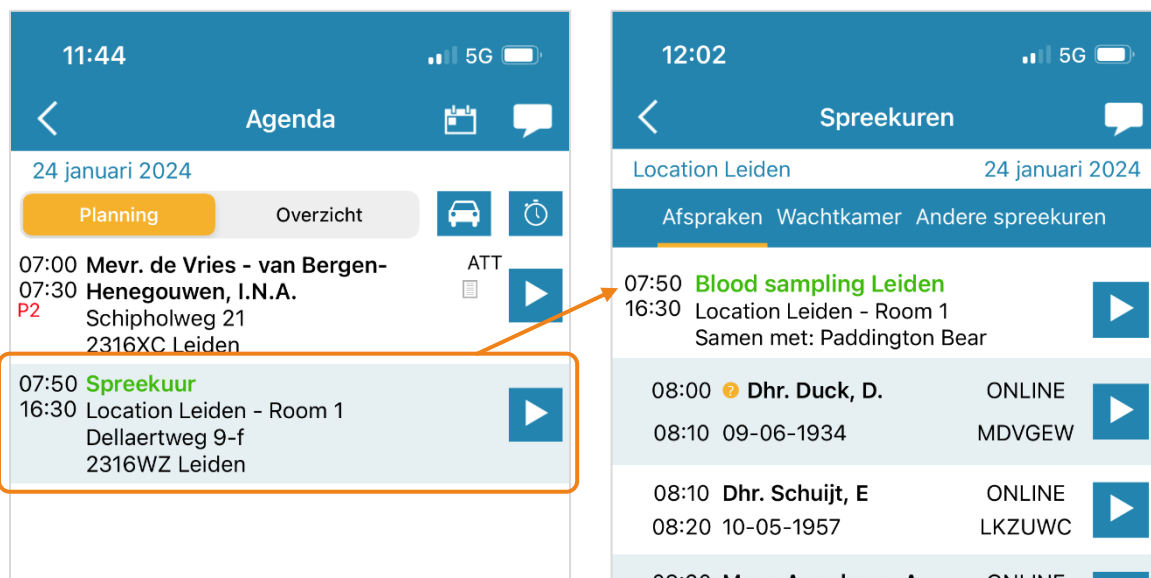
1.1 Advanced support of session appointments on mobile

Available with SW Resources 8.3 and up + Mobile Service 8.3.1 and up

In the previous iPhone version 8.3.0, we introduced the display of session appointments in the mobile app and added basic registration functionality for these appointments. In this version, we are excited to provide more advanced support for working with sessions.

1.1.1 Recognize sessions better in the main agenda

In the main agenda, session appointments are now more easily distinguishable from the home visit appointments that come from the classic planning boards.



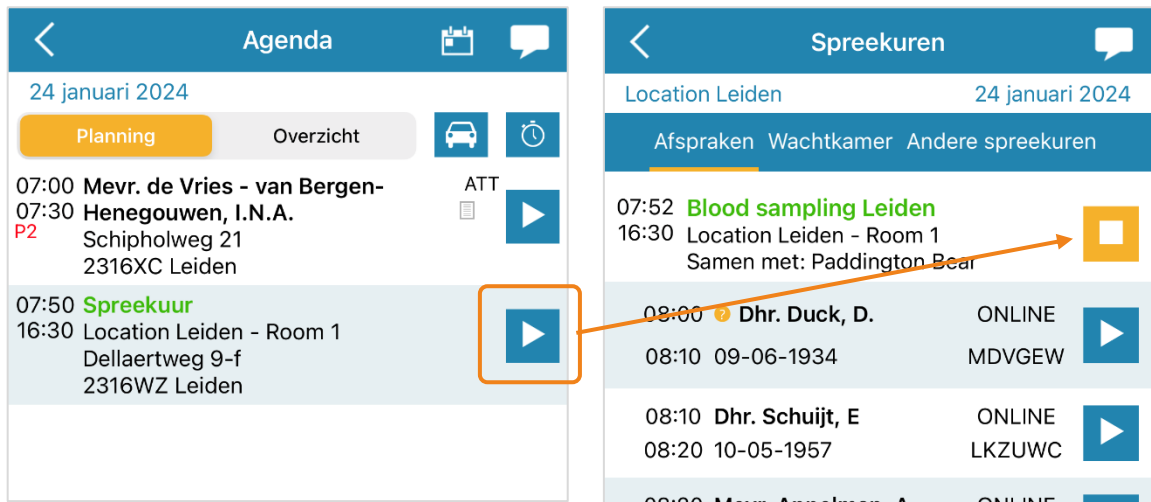
The word 'session' is shown in a green color, which corresponds to the session name that is shown at the top of the session page when you actually open the session. There it is shown in green as well.

When the session name is identical to the location name, we stick to showing the word 'Session' instead of the actual session name.

1.1.2 Start/Stop registration of the session itself from within the session page

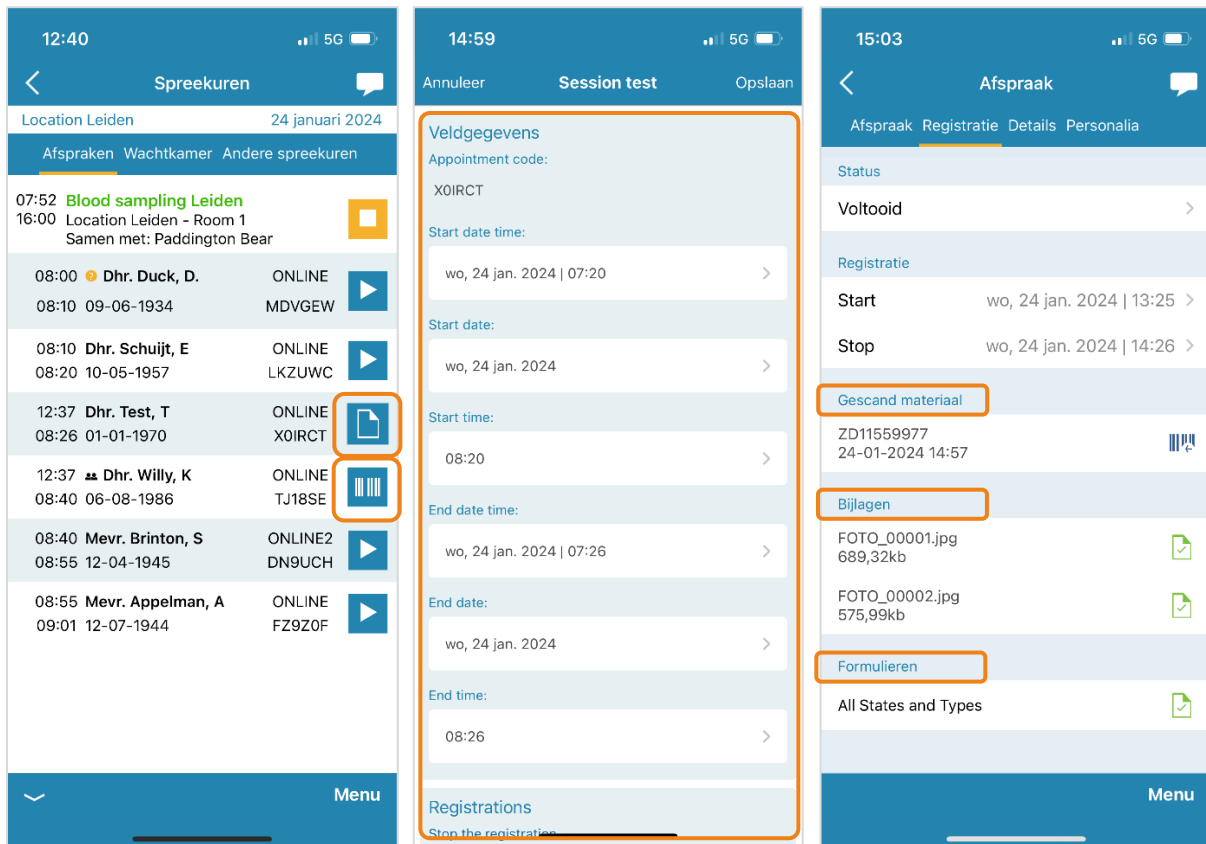
Until now, the start and stop buttons for session registration were only accessible from the main agenda. However, in this new version, we've enabled the ability to start and stop a session from the opened session page as well. This means you can initiate the session registration from the main agenda, and subsequently complete the registration from the session page, preferably after completing all client appointments (although this is not a requirement).

ServiceWare Resources for iPhone 8.4.0



1.1.3 Advanced registration: barcodes, forms and attachments

Now, for all session appointments, you have the option to attach files, complete dynamic forms, and include scanned barcodes – just as you would for appointments on the Classic planning boards, making the process consistent and familiar.



Note that registered session appointments are never included in the automatic kilometer calculation. The session itself is, but the individual client appointments that are handled during the session, are not.

Serviceware Resources for iPhone 8.4.0

1.1.4 In-flow actions for session appointments

Also available for session appointments, are the additional actions 'in the flow':



Open external application



Start scanning barcodes

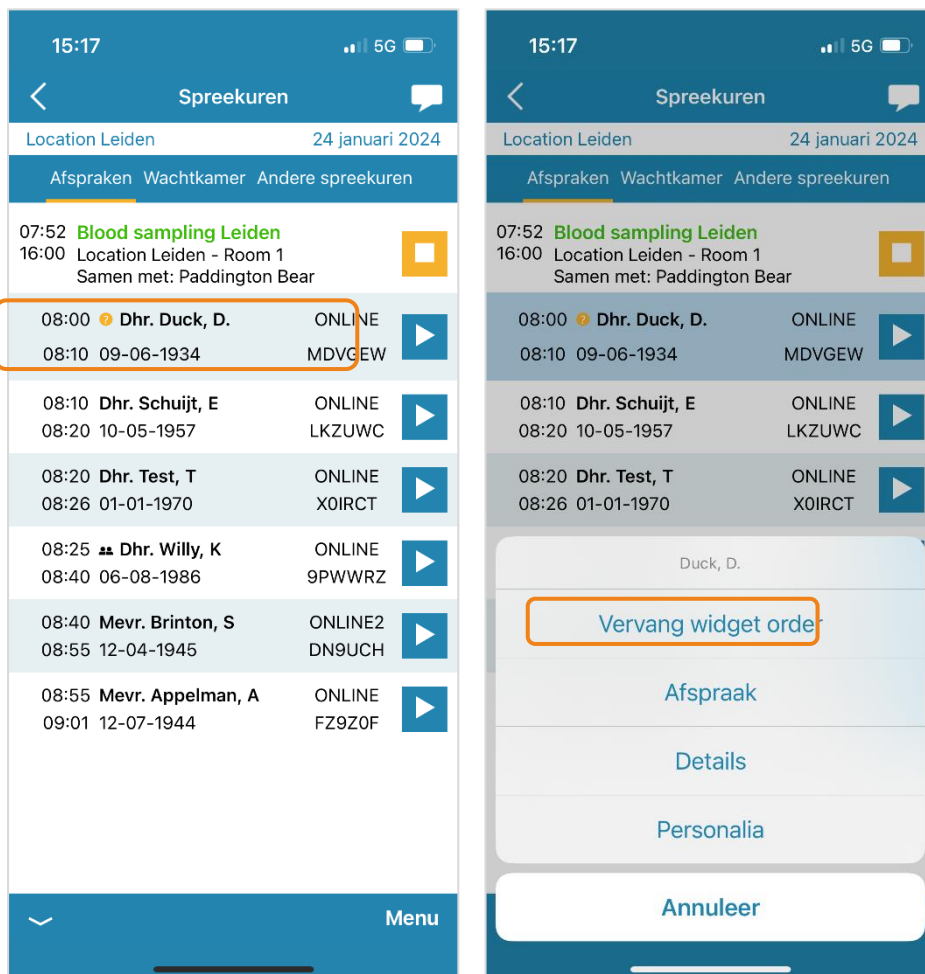


Open the form

1.1.5 Replace an appointment widget order with an actual order of the client

When appointments were initially planned on a session using the appointment widget, they were created for a "dummy" client and linked to a "fake" order with the number '1'. Creating registrations for such fake orders proved to be ineffective because the form entries and scanned barcodes would not be transmitted to any receiving system.

With our enhanced support for working with sessions, we now offer an option to substitute these placeholder appointments (marked with an orange ? icon) with genuine ones assigned to the actual client and the correct order. Upon selecting this option from the menu, you'll be directed to the client and order search wizard. Here, you can either scan the real order number or input information like the client's date of birth. Next, you'll need to choose the correct client if multiple clients match the criteria, and then select the correct order.



Serviceware Resources for iPhone 8.4.0

The new appointment will now be put into the session's agenda, preserving the original appointment's timing. The original appointment is then removed. Importantly, performing this replacement action will not trigger any notifications, ensuring that the client remains unaware of the change.

It's worth noting that the appointment code and status (e.g., 'Arrived') from the original appointment won't carry over to the new appointment. We anticipate on resolving this issue in the upcoming version.

Additionally, when replacing the initially planned order with the correct one, it's possible that the correct order might be associated with a different service than the one created via the widget. For a successful replacement, both services should be allowed on the session.

And even though it will result into a red colored appointment on the session planning board, it *is* allowed to do a replace when it creates an appointment for service X on times that fall outside any specific service times for service X, as long as service X is allowed *somewhere* on the session.

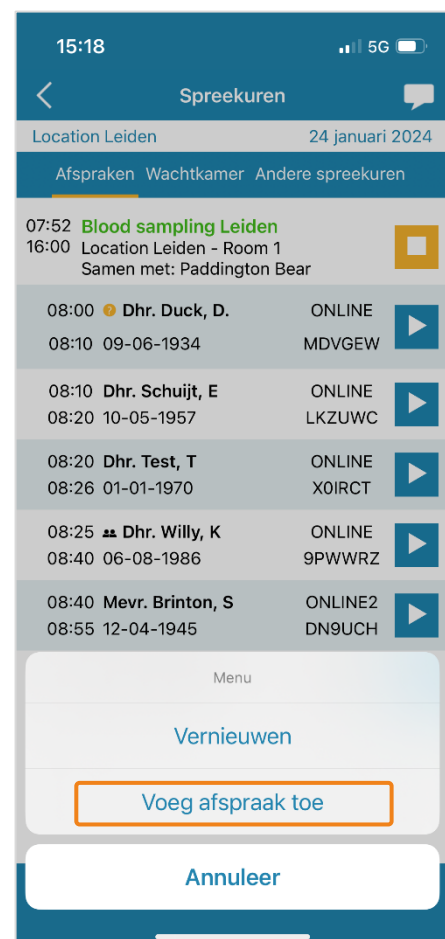
1.1.6 Add a walk-in client to the current session using their actual order

Walk-in scenarios, where a client visits the location without a prior appointment, can now be managed directly from within the session page. In the background, these appointments are now added to the session, placed at the current time, rather than being placed on a classic day planning board as in the past.

To add such an appointment to the session, you'll find the option "Add appointment" in the menu that is located at the lower right corner of the session page. Clicking this option initiates a process where the client needs to be identified (e.g. by scanning the order number) and the correct order must be selected. This process remains unchanged from previous versions.

We made sure that clients don't get any appointment confirmation notifications in such case.

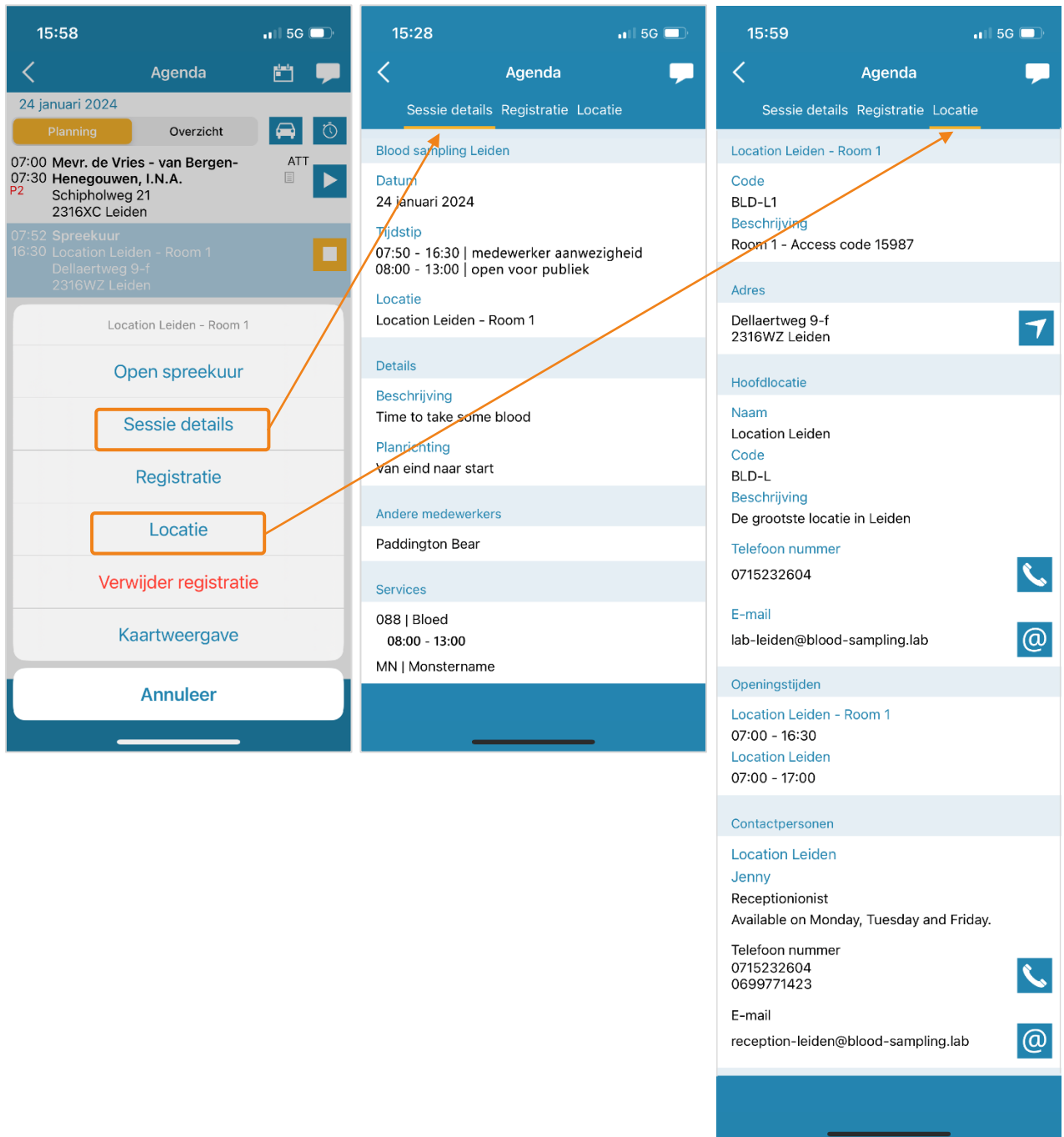
It's important to note that adding these appointments is only possible when the service associated with the order is permitted on the session. Additionally, any specific service times are disregarded to simplify the planning of these last-minute appointments.



ServiceWare Resources for iPhone 8.4.0

1.1.7 View details of the session and the (parent) location

From the session appointment, whether from the main agenda or from the session page, you can access additional information about the session. Additionally, the location tab has been expanded to display information about the parent location.



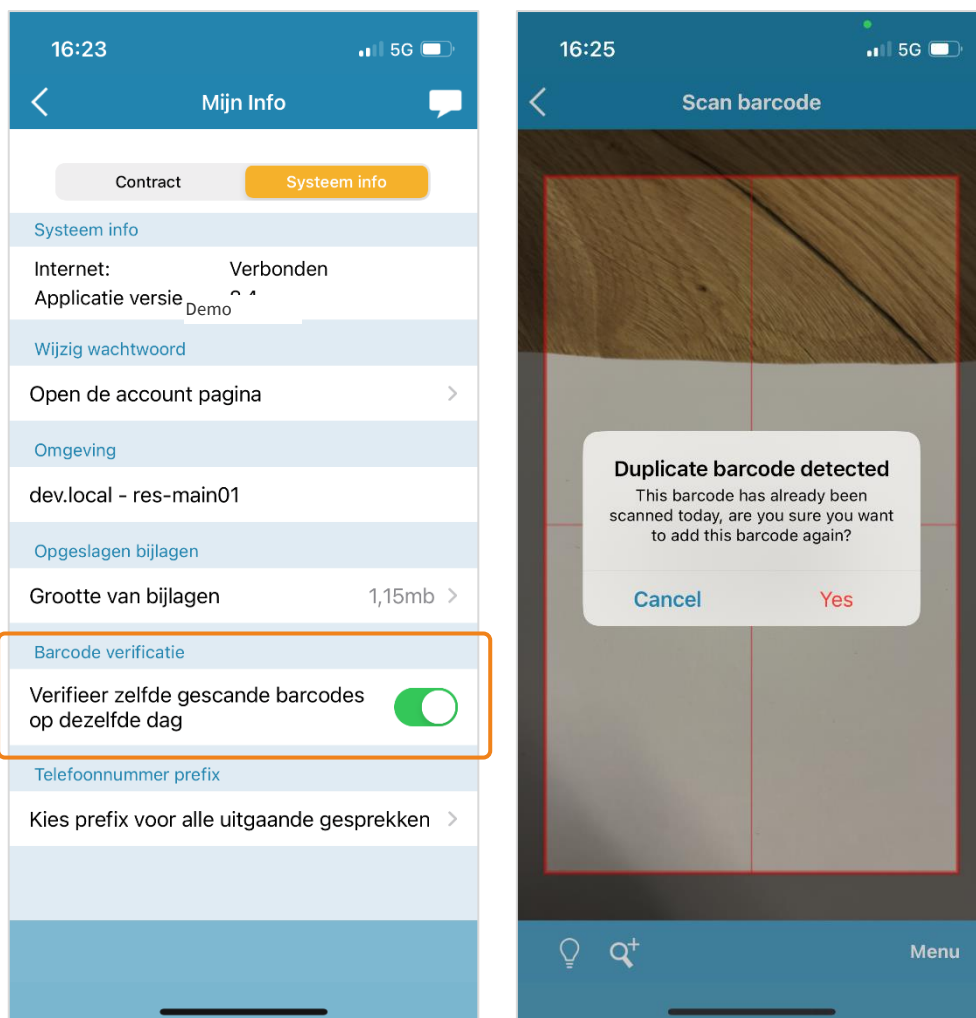
ServiceWare Resources for iPhone 8.4.0

1.2 Check if scanned barcode is used already today in other appointments

When scanning a barcode, up until now, the system would check if this barcode had already been scanned for the specific appointment in question. However, there were instances where users accidentally scanned a barcode that had already been used to register a different appointment earlier in the day.

To address this issue and enhance user awareness, we have implemented an extended check that examines all barcodes scanned on the same *day*. This check will notify the user when they attempt to scan a barcode for the second time today. However, it's important to note that this warning can still be overridden, allowing users to continue their work in case they unintentionally scanned a wrong barcode during a previous appointment earlier in the day.

Users have the option to activate this check in the 'System' tab within the 'My Info' section. In a future version, we are planning to introduce an organization-wide setting that will enforce this check for all users.



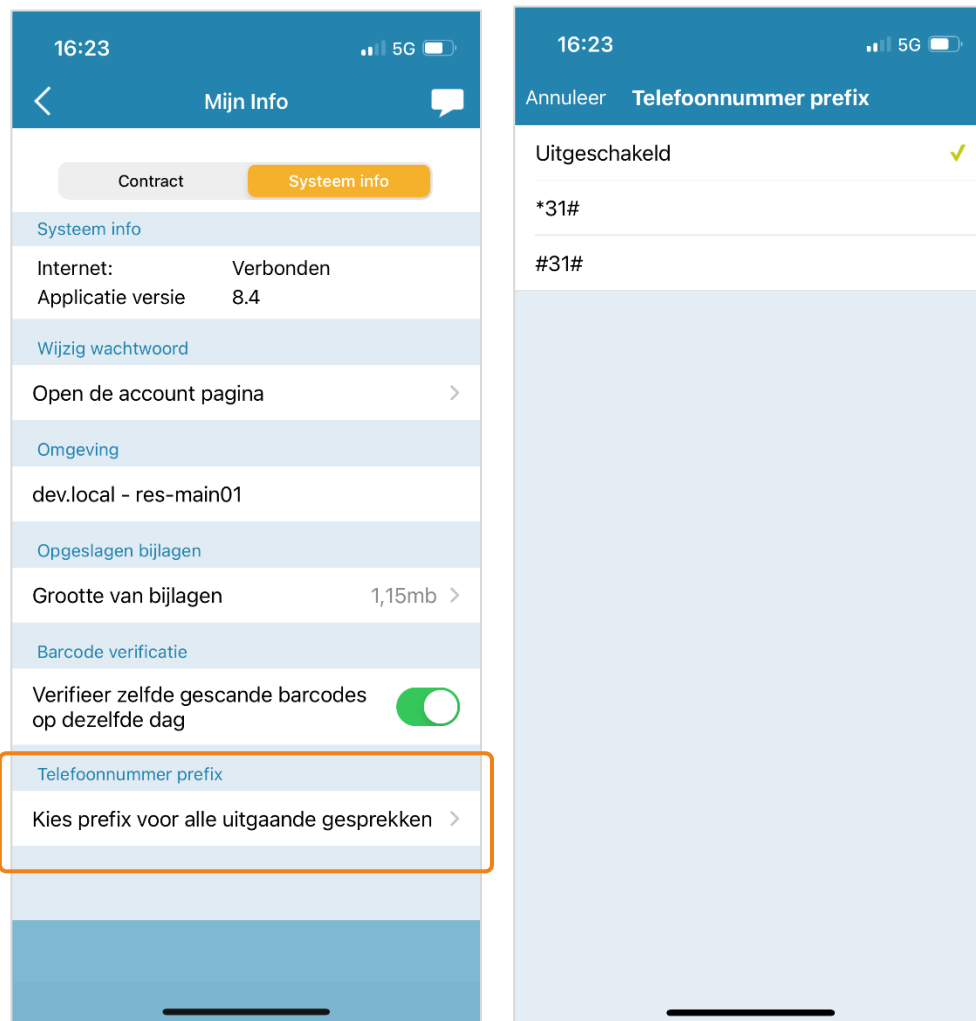
ServiceWare Resources for iPhone 8.4.0

1.3 Make anonymous calls

It is now possible to anonymize any outgoing calls that are made from within the SW Resources for iPhone app. Users have the option to enable this via the 'System' tab within the 'My Info' section.

It is important that the correct prefix is selected from the list. Which prefix will work is dependent per country and can also differ per provider:

- For the Netherlands, the #31# prefix is used by KPN, while other providers use *31*.
- In Germany, *31# is used.

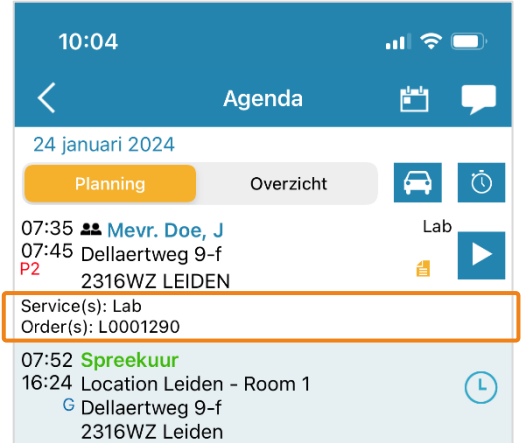


2 Improvements & Bugfixes

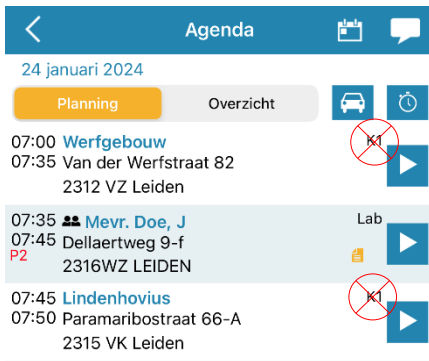
2.1 Order number shown in agenda when expanding the appointment

In both the main agenda and in the session agenda, we've added the order number to the information that is revealed when expanding the row.

For appointments from the Classic planning boards, we display only the external order number. However, for session appointments, we provide information for both the external order number and the internal order number used within Serviceware Resources.



2.2 Room indicator 'K1' removed at location appointments

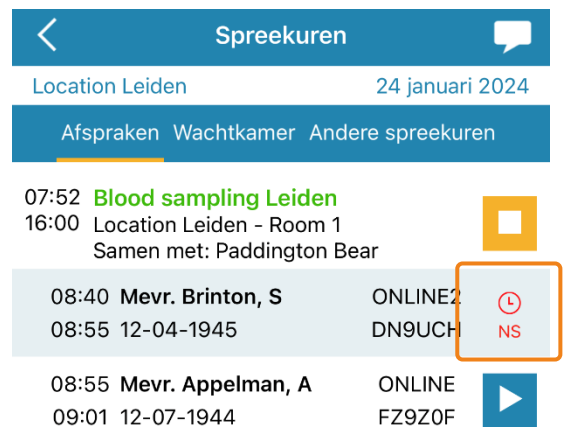


For appointments from the Classic planning boards, we have removed the 'K1' room indicator from the main agenda. The room is now integrated into the location itself and typically has a different name or number than 'K1.' Displaying the indicator was causing unnecessary confusion.

2.3 Show 'registered' clock in red when registration state is 'Failed'

For both the appointments from the Classic planning boards as the session appointments on the session page, we made an unsuccessful registration stand out more. The clock icon on the right will now be shown in a red color and accompanied by the 'failed reason'.

Note that for Classic appointments, these reasons are fixed (**NG** ('Niet gelukt', **TNG** ('Technisch niet gelukt'), **NT** ('Niet thuis')), while for session appointments these reasons can be defined per customer, by an administrator using the masterdata section in the Serviceware Resources web application.



ServiceWare Resources for iPhone 8.4.0

2.4 Client & order search improvements

When adding an appointment for a walk-in scenario, whether via the already existing way via the client module or via the session page (§1.1.6), and when replacing a session appointment (§1.1.5), it is necessary to select a client and choose the correct order. The following enhancements have been implemented on these client- and order search pages:

2.4.1 Search client: selecting a single found client automatically

When during the search client step only a single client is found, for example after scanning a barcode representing a unique order number, then this client is now automatically selected, saving the user an extra click.

2.4.2 Search client: no 'nearby clients' when searching from within a session

When coming from an opened session, then on the search client step, the 'nearby clients' category isn't shown as this made no sense when the employee and the client meet at a location and not at the client's home.

2.4.3 Search order: subject & external number shown when choosing an order

When choosing between multiple orders for the selected client, now also the *external order number* of the order is shown as well as the *subject*.

2.5 Dynamic forms fixes

2.5.1 The 'Is of multiple birth' property now also accessible in dynamic forms

Previously, the information indicating that someone was part of twins could not be utilized in our dynamic forms. This functionality has now been added.

ServiceWare Resources for iPhone 8.4.0

3 Technical Changes

The ServiceWare Resources App was built using the Xamarin Framework that was maintained by Microsoft. After many years Microsoft has decided to no longer support newer iOS SDK versions for Xamarin and were forcing companies to migrate to their newer MAUI Framework.

Because we need to support newer iOS SDK versions in order to comply with the Apple App Store requirements, we also had to migrate our codebase from Xamarin to MAUI.

This version of the ServiceWare Resources App is built with the following versions:

- Apple Xcode 15.2 with iOS SDK version 17.2
- Microsoft MAUI (net8-ios) version 8.0.2

The following parts had major changes that might impact the way the app works for your organization, please look at these parts carefully during testing:

- **Barcode Scanning:** The Resources app now uses the newer Apple built in AVCaptureSession to scan barcodes.
→ Please verify during testing if the barcodes that your organization uses still scan correctly.
- **Sqlite:** The database logic now uses the newer Microsoft.Data.Sqlite library to connect to the local database.
→ In case your organization is using a Mobile Device Management tool to distribute, protect or wrap the Resources app, verify that the new changes are compatible.
- **Label Printing:** Zebra has not yet released an official final version that is compatible with label printing, but has released a beta version that is compatible which we have included in this release for Classic appointments. For session appointments, label printing has not been included yet.
→ If your organization uses the label printing functionality, please verify that the labels for your organization are being printed as expected.

Serviceware Resources for iPhone 8.4.0

4 Installation requirements

The following items are required for the installation of Serviceware Resources for iPhone 8.4.0:

- › Serviceware Resources for iPhone 8.4.0 is compatible with all Serviceware Resources (web) version in the 7 and 8 series. However, to be able to use the new functionality for session appointments, [SWR 8.3.0](#) and [Mobile service 8.3.1](#) are required.
- › Windows Server 2008 SP2 or higher. In case of the server having Windows Server 2008 installed, it needs to have at least Service Pack 2 or higher. Windows Server 2008 SP1 is not supported because of an issue with Microsoft .Net.
- › The webserver needs to have Microsoft .Net 4.7 Full installed and patched at least up to version 4.7.1.
- › The webserver requires to have a valid SSL certificate installed
- › The download and update location must also have a valid SSL certificate installed
- › **The iOS devices require to have at least iOS version 12.0**, where 17.3 is recommended. iOS versions 6.0 till 11.1 are no longer supported. If devices are not updated to iOS 12.0 yet, we advise to update the device to the most recent supported version prior to updating the Serviceware Resources for iPhone app to version 8.4.
- › Total list of supported iOS versions
 - › 12.0 – 12.5.7
 - › 13.0 – 13.7
 - › 14.0 – 14.8.1
 - › 15.0 – 15.7.8
 - › 16.0 – 16.7.5
 - › 17.0 – 17.3

For a complete list of hardware and software requirements, see: “[Serviceware Resources - Hard- and Software specifications _EN_v80](#)”.