What's New in MobileTech in MobileTech 2023 (9.5)
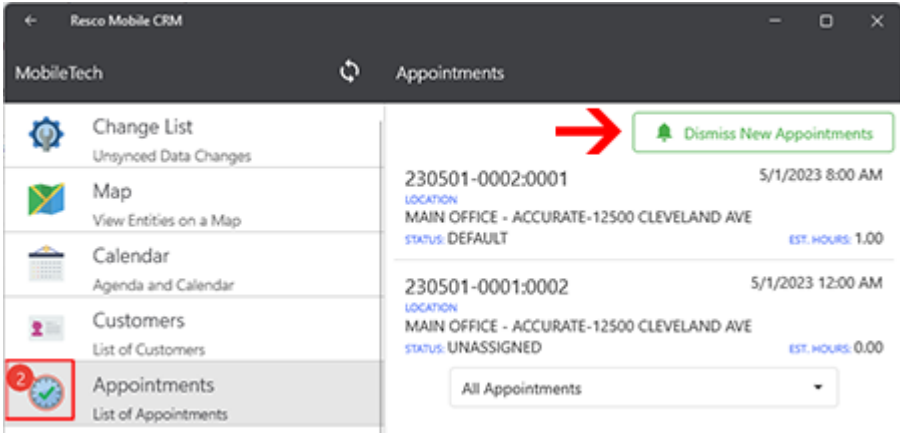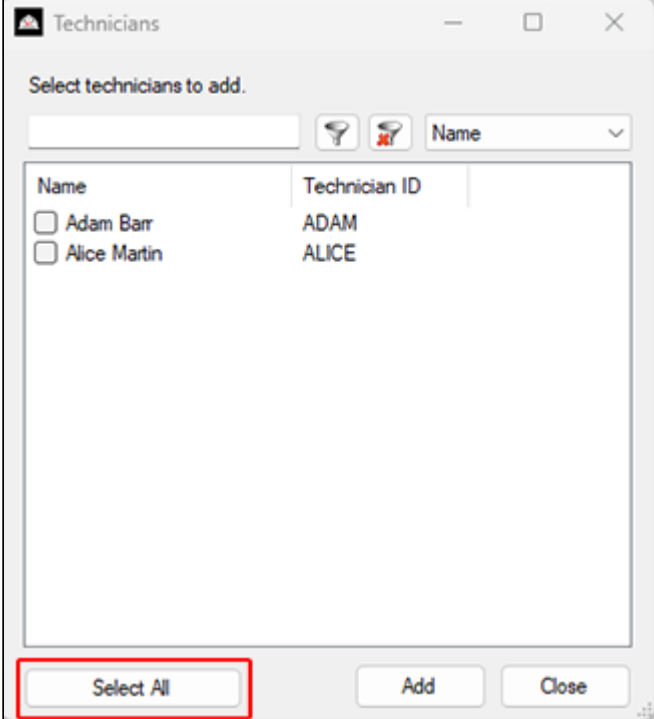
Release Version: 2023 (9.5)
Release Date: September 2023
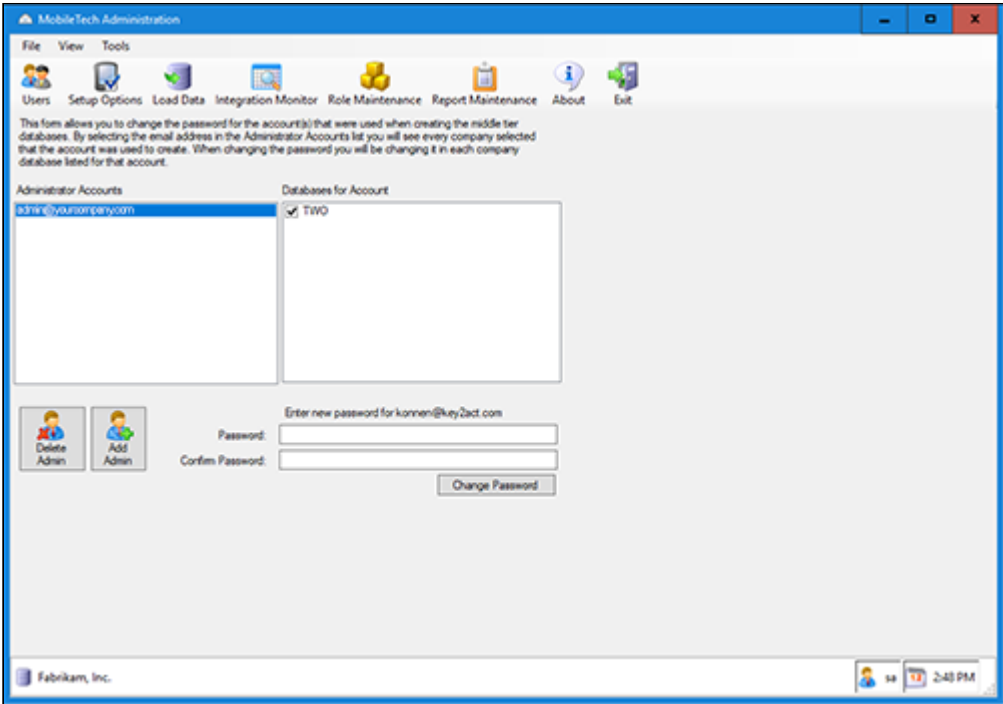
General

Case #	New Feature
MT-603	**The Appointment icon from the home navigation now displays a notification number that indicates the count of new appointments after syncing the device.** The notifications remain until the technician selects Dismiss New Appointments located at the top of the Appointments List (by selecting Appointments from the home navigation or from the Service Call form > Appointments tab) or if they sync the device again. If the technician dismisses the notifications of the new appointments from the Service Call form, only the notifications for the new appointments related to the service call are dismissed.

Case #	New Feature
MT-642	**When adding technicians to Role Maintenance, you can now click a Select/Unselect All button to mark/ unmark the checkboxes to the left of the displayed technicians.** The Deselect All is displayed once you have technicians selected. See User Role Maintenance[1].
MT-652	**We have added the ability to map unbilled transactions to the Microsoft Dynamics GP General Ledger account number.** When the technician adds an unbilled transaction, the GL account is added to the transaction. See Map Unbilled Activities to General Ledger Accounts[2].

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1 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620295/User+Role+Maintenance
2 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6626921/Map+Unbilled+Activities+to+General+Ledger+Accounts

Case #	New Feature
MT-703	**For job and service appointments, when the appointment description exceeds 50 characters, an appointment note is created.** The note can be marked as Is Internal so that the note does not appear on any customer reports. The note subject is titled Description. The appointment note can be viewed in Signature as an attached note.

The fields shown in the Appointment Details:

In the Appointment List:

In the MobileTech Appointment Note:

Case #	New Feature
MT-706	**You can now enter items to invoice through SOP on a job appointment in MobileTech.** We've added a new Use SOP for Inventory in MobileTech option in the Job Cost Setup Options window that needs to be

Case #	New Feature
	enabled. See <u>Choosing Job Cost Setup Options</u>[3]. The inventory items are processed in the Mobile Inventory Inquiry window. See <u>Process Inventory and Non-Inventory Item Transactions</u>[4].
MT-752	**The Change an Administrator Password option available from the Tools menu has been renamed to Manage Resco Administrator Account.** In addition to being able to update an admin's password, an administrator can now add an administrator account, add/remove access to one or more databases, and/or delete an administrator account. See <u>Manage Resco Administrator Account</u>[5]. ⚠ This option is available only for users who belong to the SysAdmin role in SQL Server. These users can be Windows or SQL users. You can change the password for only one MobileTech administrator at a time.

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3 https://wennsoft.atlassian.net/wiki/spaces/1806b08/pages/8161161/Choosing+Job+Cost+Setup+Options
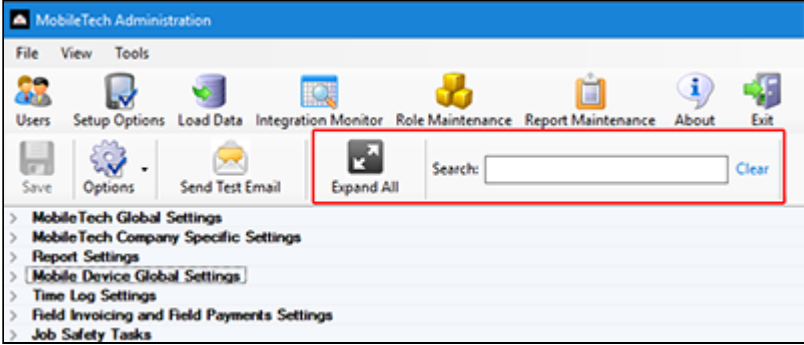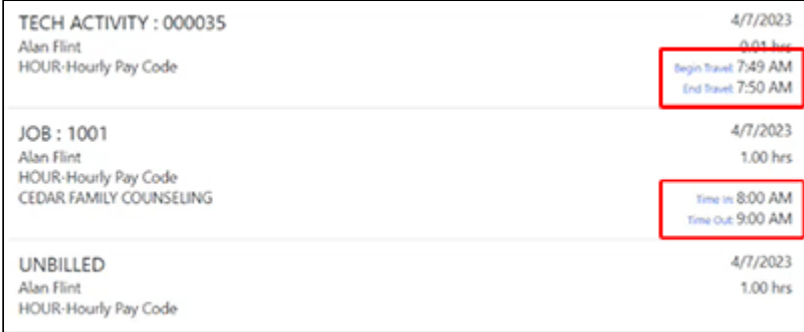4 https://wennsoft.atlassian.net/wiki/spaces/1806b08/pages/8160765/Process+Inventory+and+Non-Inventory+Item+Transactions
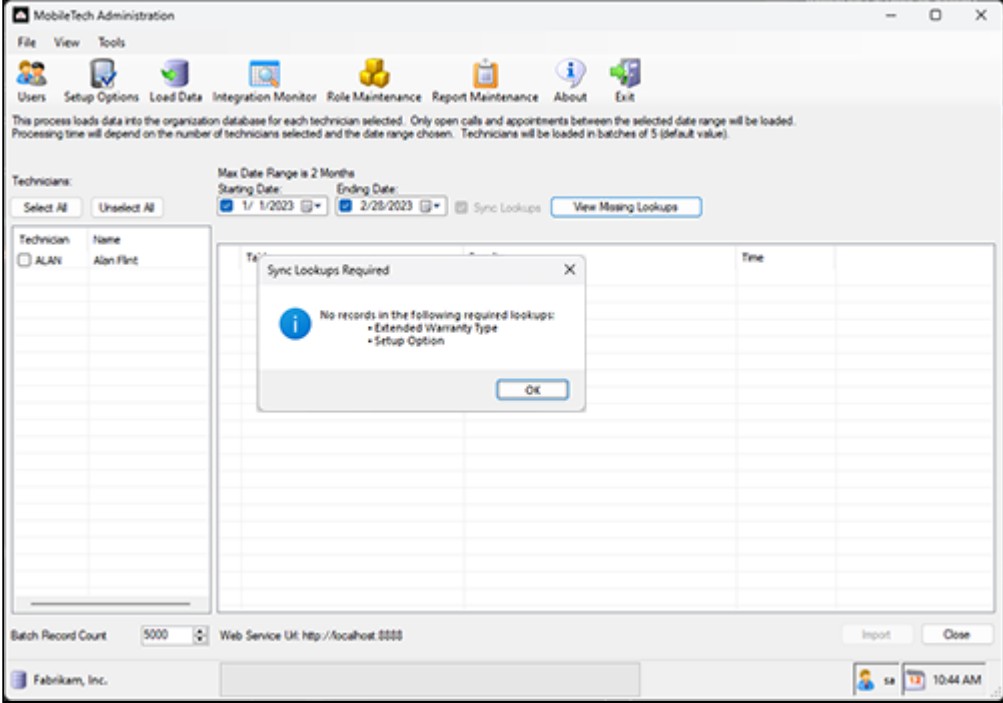5 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620376/Manage+Resco+Administrator+Account

Case #	New Feature
MT-765	**Separate time entries are now created if a user times in/out and the resulting values overlap midnight of the default week-ending day.** Midnight is determined by the technician's device. The first entry is for the time up to midnight (12:00 am) and the second entry is post-midnight (12:00). For example, the week-ending day is set to Friday. If a technician times into an appointment at 10:00 pm on Friday and times out at 2:00 am on Saturday, two entries are created. The first time entry is for the previous time period (10:00 pm to 12:00 am) and the second time entry is for the current time period (12:00 am to 2:00 am). The default week-ending day is determined by the existing Default Week-Ending Day that is set up in TimeTrack. See Choosing Setup Options[6] in the TimeTrack documentation.
MT-767	**If you have any customers who do not allow the use of XOi onsite, you can now disable XOi Deep Linking for the specific customer(s).** Go to MobileTech Admin > Setup Options > Options > Customer Setup. Mark the checkbox in the Disable XOi Deep Linking column.

MT-768	**We've updated the MobileTech Cleanup job to include service appointment and job appointment steps with the following criteria.**
	
	• Service Appointments:
	 An integration record is created to delete the appointment.
	    • With a Task_Date 14 days before or after the current date.
	    • With a Task_Date within 14 days of the current date but have a status that is REASSIGN or COMPLETE.
	• Job Appointments:
	    • With a Start Date 14 days before or after the current date.
	
	 ⚠ If you currently have a Cleanup Job set up, you will need to recreate the job to add the new Service Appointment and Job Appointment steps. For more information, see Create a Cleanup Job for the Middle-tier Database[7].

MT-772	**Field invoicing is now disabled when the Invoice_Type equals 1 (Fixed) or 3 (NTE) for the service call that originated from a quote in Service Management.** The Reports tab is hidden and the Location Contacts are not displayed when completing the service appointment. With this new functionality, we have also added "invoicetype" to the servicecall entity for MobileTech.
MT-773	**MobileTech's new call creation process has been transitioned to now use wsiSMSServiceCall.** (MobileTech had been using SMS_Create_Service_Call.) The transition was made to align the MobileTech process with the same process that we use with Schedule.

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6 https://wennsoft.atlassian.net/wiki/spaces/1806b08/pages/8161305/Choosing+Setup+Options
7 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620236/Create+a+Cleanup+Job+for+the+Middle-tier+Database

Case #	New Feature
MT-778	**You can set up MobileTech to automatically include the technician name (request the report) in the subject line and attachment filename.** Add {0} to the Employee Time Sheet to add the technician's name as specified in the systemuser table. See Optional: Adding Information to Email Subject Lines and Attachment Names[8].
MT-786	**For reporting and/or filtering purposes, we've added Division to the middle-tier servicecall entity.** This field is read-only and is not exposed on any of the MobileTech forms.
MT-787, MT-791, MT-800	**In the MobileTech Admin Setup Options window, you can now:** • **Search for a specific setup option name.** The search is case-insensitive. Use the Clear button to remove the text from the Search field. • **Collapse All/Expand All of the sections to quickly navigate to the specific section.** The default view is with all sections expanded.
MT-788	**On the Time Entry list, we now display the Time-In/Time-Out or Begin Travel/End Travel times.**

Case #	New Feature
MT-802	**We've updated the Load Data window so that if any of the required lookup tables are missing lookups after the load data process, the Sync Lookups checkbox remains marked and disabled and the View Missing Lookups button is displayed.** Select the View Missing Lookups button to display a popup window that lists the required lookups that do not have any records in their table. The required tables include callresolution, appointmentstatus, calltype, costcode, equipmenttype, extendedwarrantytype, manufacturer, paycode, problemtype, taskstatus, unitofmeasure, setupoption. See Load Data[9] for more information.

> ⚠ If your company does not use the displayed required lookup(s), like the Extended Warranty Type, you do not have to do anything. This does not indicate that you have missing or bad data.

MT-801	**You can now choose to display the Task Materials AND Replacement Parts tabs on the Appointment Completion form for service appointments.** Prior to the MobileTech 9.5 release, users could only enable one of these options. For more information about each option see Task Settings[10] for the task materials setting and Equipment Settings[11] for the replacement parts setting.

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9 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620293/Load+Data
10 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620255/Task+Settings
11 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620253/Equipment+Settings
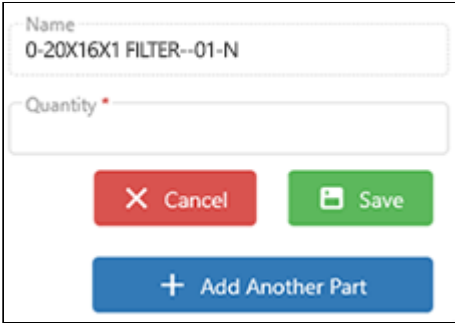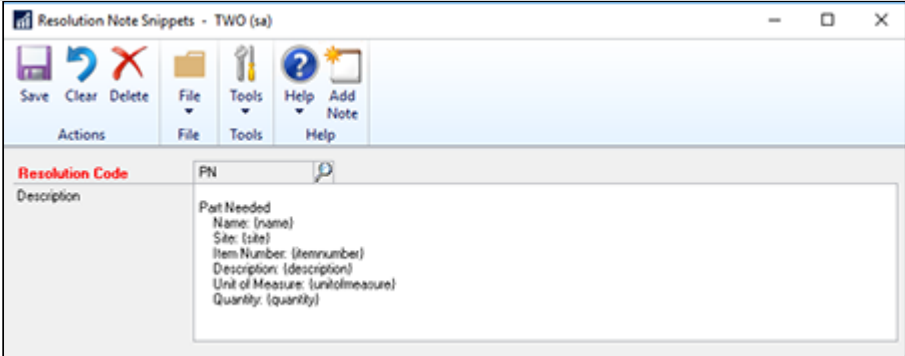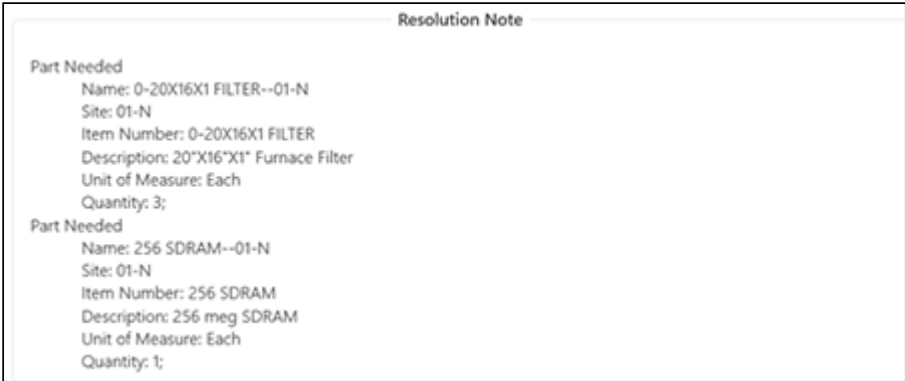
Case #	New Feature
MT-806	**When a technician only has one site assigned in Service Management, that site will now default on the PO Line when creating a non-inventory purchase order.** If the technician has more than one site assigned: • The technician will need to select the site. • If the technician is assigned to the default site set up in Purchase Order settings, that site will default to the PO Line. See Purchase Order Settings[12] for more information about designating a default site.
MT-808	**In the Report Email Options window, the Call Type drop-down list has been removed for the Job Appointment Summary** because call types are not available for job appointments.
MT-809	**The laborexpense.userdefine1 mapping has been changed to map to WS10702.User_Define_1.** Previously it was mapped to US10702.LOCNCODE.

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[12] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620257/Purchase+Order+Settings

Case #	New Feature
MT-870	**You can now create a specific "parts needed" resolution note snippet in Signature that when selected in MobileTech, the Site Inventory list opens.** Technicians can select the part and quantity needed. The resolution note snippet includes additional information related to the selected part. See <u>Setting Up Information in Microsoft Dynamics GP</u>[13] for information on setting up the resolution note snippet and see <u>Enter an Appointment Resolution</u>[14].

In Signature, create the resolution note snippet with a resolution code of **PN**. Then add the curly bracket information in the description text box along with any other labels that you want to display.
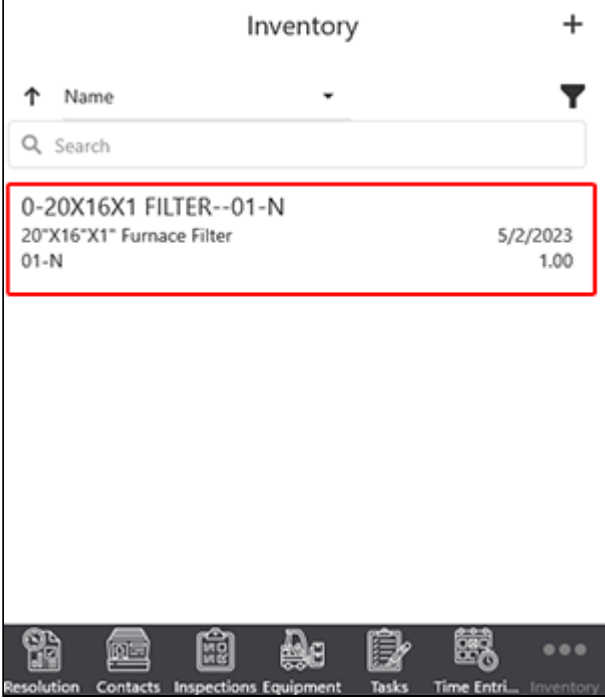
One example:

Part Needed
 Name: {name}
 Site: {site}
 Item Number: {itemnumber}
 Description: {description}
 Unit of Measure: {unitofmeasure}
 Quantity: {quantity}

Another example might be to have everything on one line without descriptions:

{name} - {site}: {item number} - {description}, Quantity: {quantity}

> ⚠ • The curly brackets and information within the brackets have to be exactly as written.
> • The resolution code also must be PN.
> • You can enter any descriptive text and the information does not have to be specifically written on separate lines.
> • The Quantity line is optional. If you want the Quantity field to display in the pop-up form, add the Quantity line.

Screenshot of the pop-up form after the technician has selected the item from the Site Inventory List:

Screenshot of the Resolution Note Snippets window in Signature:

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13 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620366/Setting+Up+Information+in+Microsoft+Dynamics+GP
14 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620483/Enter+an+Appointment+Resolution
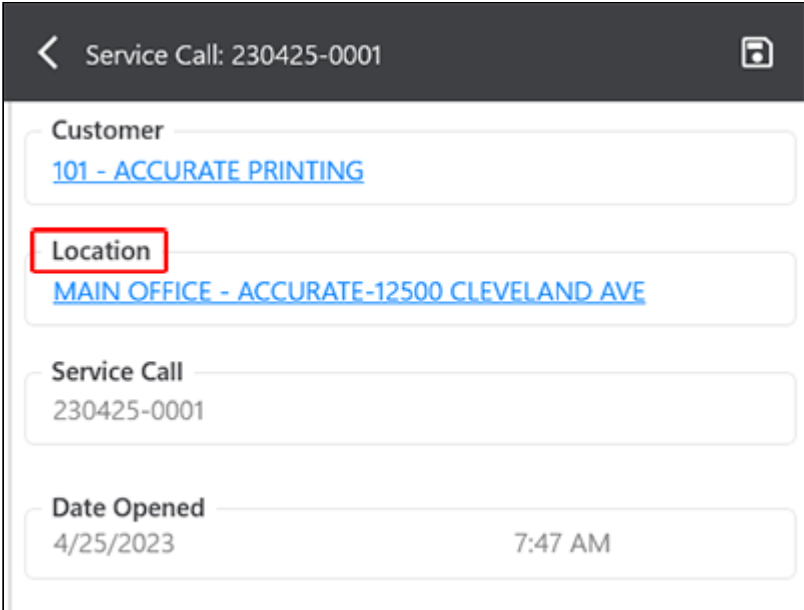
Case #	New Feature
Screenshot of what the note looks like on the Appointment form in the Resolution Note section with 2 different parts needed:

Case #	New Feature
MT-873	**Inventory applied to a service call from the back office is now visible from the Inventory tab on the Appointment Completion form.** Technicians cannot edit or delete these inventory items. These inventory items can be added in Service Management from an inventory adjustment or from an SOP transaction. See Enter an Inventory Transaction Before Completing an Appointment[15]. ⚠ Only Invoice (SOPTYPE 3) inventory will be visible to the technicians. Return SOP (SOPTYPE 4) will not be visible to technicians.

15 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620467/Enter+an+Inventory+Transaction+Before+Completing+an+Appointment

Case #	New Feature
MT-887	**Field labels have been updated to display above the field instead of to the left of the field.** Service Call: 230425-0001 Customer 101 - ACCURATE PRINTING Location MAIN OFFICE - ACCURATE-12500 CLEVELAND AVE Service Call 230425-0001 Date Opened 4/25/2023 7:47 AM
MT-901	**We've added a read-only Salesperson field to the MobileTech Service Call sync payload.** This field is populated from the SV00300 table. There are no UI or Plugin changes at this time, however, you are able to add the salesperson information as needed to reports, etc.

Case #	New Feature

MT-1077	**We have improved security by updating the sysadmin requirements:**
	
	• A user with the sysadmin server role (does not need to be 'sa' user) is needed to perform the initial installation or upgrade. See Install MobileTech Server[16] and/or Upgrade MobileTech Server[17].
	
	⚠ The sysadmin user is needed in the MobileTech Installer, and in MobileTech Admin (only for first login to create/update all db and objects).
	
	• When entering Quadra parameters, the sysadmin user role is needed to apply MobileTech permissions on the entered QuadraDbName. See Quadra Integration[18].
	
	We've also changed what users can access in the MobileTech Admin > Tools menu. See Access by User Role/Type[19].
	
	• A user with the **sysadmin server role**, can do the following tasks:
	  • Create MobileTech Objects
	  • Update Middle Tier Database
	  • Create Middle Tier Database Clean Up Job
	  • Load Data
	  • Refresh Lookups
	  • Manage Resco Administrator Accounts
	  • Update Password Policy
	  • Launch Resco Cloud Dashboard
	  • Install Resco MobileCRM Client
	• A '**mobiletech**' user can do the following tasks:
	  • Update Middle Tier Database
	  • Load Data
	  • Refresh Lookups
	  • Manage Resco Administrator Accounts
	  • Update Password Policy
	  • Launch Resco Cloud Dashboard
	  • Install Resco MobileCRM Client

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[16] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620212/Install+MobileTech+Server
[17] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620214/Upgrade+MobileTech+Server
[18] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620137/Quadra+Integration
[19] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6625460
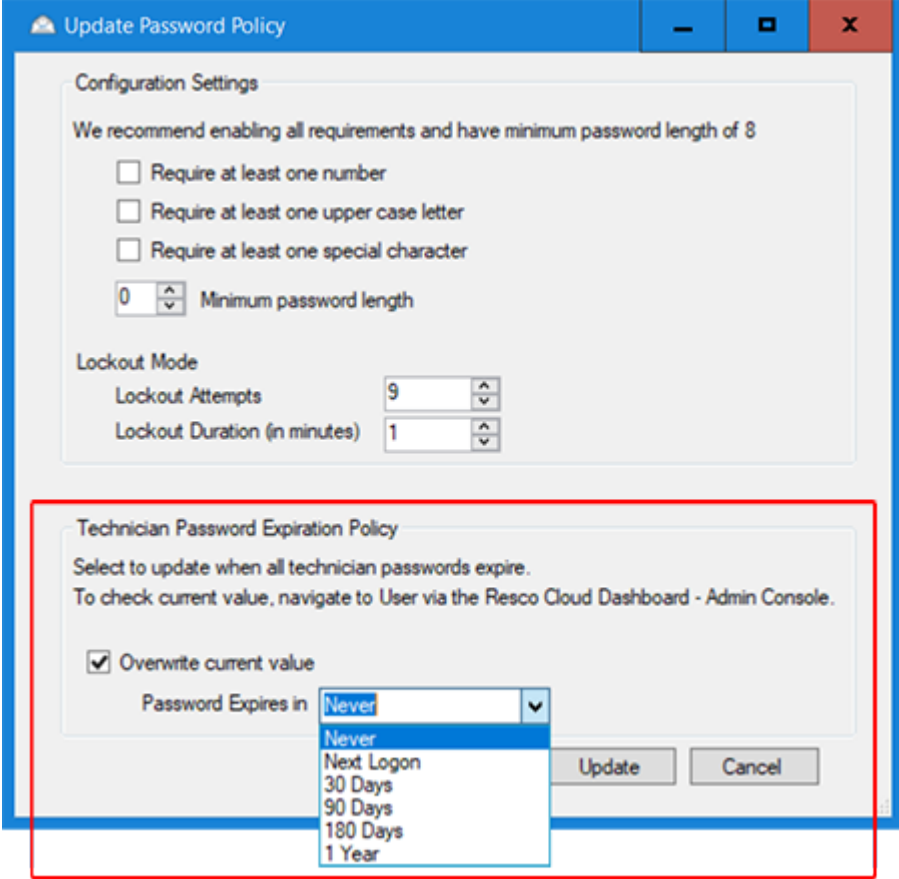
Case #	New Feature
MT-1078	**MobileTech now displays Australian telephone numbers without the United States formatting.** This is determined by the mobile device's localization. Australian phone numbers will now display without any formatting. For example, 12345678901234. If the telephone number is 14 characters long and the extension is 0000, these four characters will be removed. (For example, 12345678900000 will display as 1234567890.) The following areas display the updated telephone number format: • Additional Work Form • Location Contact Form • Location Contact List ⚠ If you would prefer the Australian-specific XX XXXX XXXX ext: XXXX (example: 12 3456 7890 ext:1234) formatting for these forms, contact your WennSoft Customer Support Representative.

Case #	New Feature
MT-1108, MT-1112	**We've updated the Password Policy window to help clarify the Technician Password Expiration Policy section.** Set up when you'd like all technician passwords to expire, which would require each technician to set up a new password that conforms to your password complexity. To check the current value, navigate to User via the Resco Cloud Dashboard Admin Console. See Set Technician Passwords with Admin Console (optional) for more information. Additionally, the default value for the **Password Expires** field is now set to *Never*. (Previously this value defaulted to *Next Logon*.) See Setup Password Complexity and Lockout Policy[20].

20 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620228/Setup+Password+Complexity+and+Lockout+Policy

New MobileTech Admin Setup Options

	Description
MT-700	**A CreateNewCallForBillOnlyLocations setup option has been added to the Service Call Settings section in MobileTech Admin Setup Options.** This is a new setup option that, when set to **True**, allows technicians to create new service calls for locations marked as Bill Only in Service Management. Additionally, the bill only customer locations have an indicator displayed next to the location name. The default value is **False**, which means the Bill Only locations do not appear in the lookups in MobileTech and technicians are not able to create new service calls for Bill Only locations. We have also added a new "isbillonly" field to the location table. See Service Call Settings[21]. With this option set to True, the indicator is displayed next to the location name.
MT-757	**The SetAppointmentDetailsOnNewCall has been moved to the Service Call Settings section.** Previously this was a line that needed to be added to SQL. The SetAppointmentDetailsOnNew Call option determines if technicians can add appointment information on a new call. The default value is **True**. If you do not want to display the Appointment Details to display on the New Call form, you can update this setting to False. See Service Call Settings[22].

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[21] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6625776/Service+Call+Settings
[22] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6625776/Service+Call+Settings

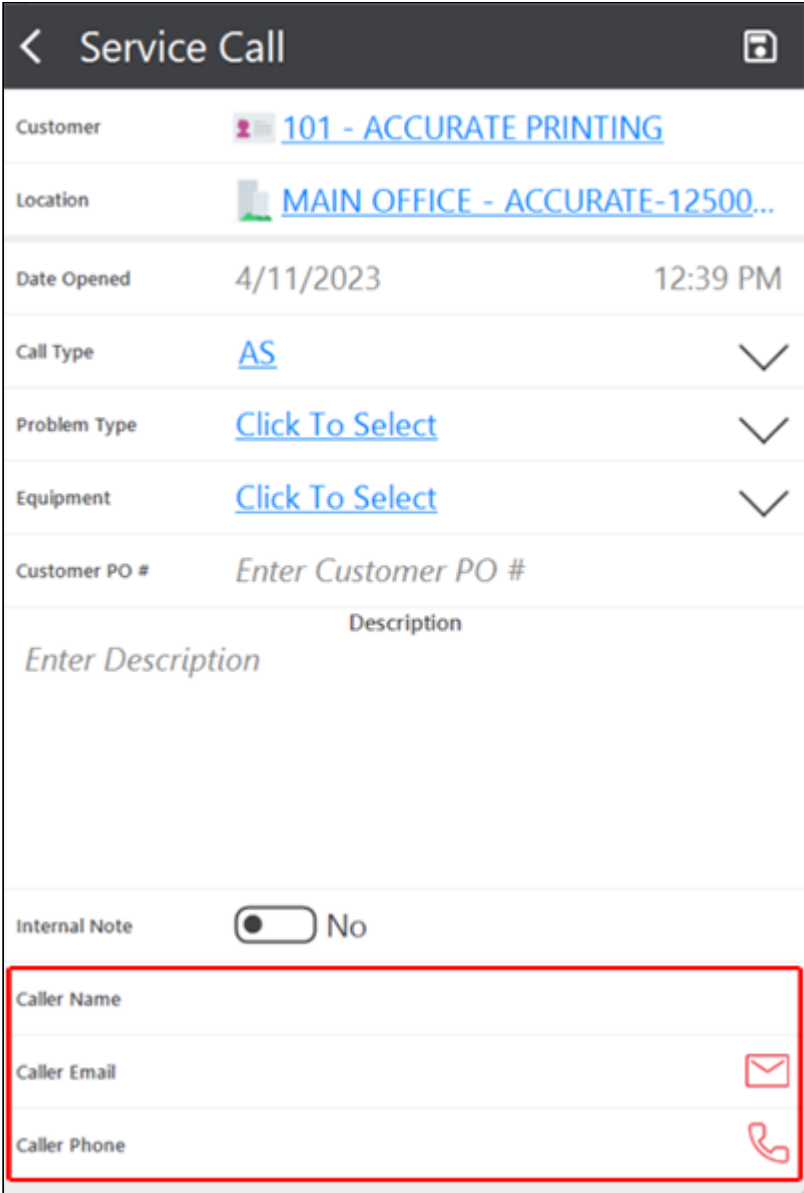|	Description
MT-764	**A new Auto Open Form Settings section has been added to MobileTech Admin Setup Options.** Previously this was manually updated in Offline HTML. When enabled for any of the lists mentioned below, when a technician selects a list tab, if the list has no items, the form to create that item displays automatically. The form auto-open happens the first time you navigate to the corresponding tab within the same instance of the Appointment Completion form. The functionality has been added to the following lists. By default, this has been enabled for the Inventory, Purchase Order Detail, and Time Entry (from the Appointment Completion form) lists. See Auto Open Form Settings[23] for more information. • Additional Work • Attachment • Change Order • Change Order Detail • Meter Reading • Note • Refrigerant
MT-764	**The UseSyncMaintenance has been moved to the Mobile Device Global Settings section in MobileTech Admin Setup Options.** The setup had previously been manually set up in Offline HTML. For more information, see UseSyncMaintenance[24]. The UseSyncMaintenance option is used to help prevent issues with users having multiple devices by displaying a sync prompt automatically on the device if the user hasn't synchronized their device after the SyncInterval value (hours). You can also set the CheckInterval (minutes) that determines how often MobileTech checks to see if the SyncInterval has been reached. Once the technician syncs the device, the Sync Interval resets. If the technician selects Cancel on a sync reminder prompt, this is logged in the JSBridge file on the device. The log file includes the date and time that Cancel was selected. The log file can be sent and you will be able to see if the technician was not syncing when they were prompted.
MT-764	**The AllowDeleteTimeIn has been moved to the Time Log Settings section in MobileTech Admin Setup Options.** This setup option previously need to be disabled/enabled in Offline HTML. The AllowDeleteTimeIn option determines if technicians are able to delete a time-in for a job/service appointment and technician activities. The default value is **True**. Select **False** if you do not want your technicians to be able to delete a time-in from their mobile device. See Time Log Settings[25].

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[23] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620139/Auto+Open+Form+Settings
[24] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620245/Mobile+Device+Global+Settings#MobileDeviceGlobalSettings-syncprompt
[25] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620247/Time+Log+Settings

	Description
MT-764	**The UsePOEventBasedSync has been moved to the Purchase Order Settings section in MobileTech Admin Setup Options.** Previously this needed to be manually enabled in Offline HTML. The UsePOEventBasedSync option determines if event-based syncing is used to sync to the host after a purchase order line is created. The default value is **False**. If set to **True**, this option also requires that UseEventBasedSync is set to True. See Purchase Order Settings[26].
MT-764	**The UseTimeLogBackgroundSync has been moved to the Time Log Settings section in MobileTech Admin Setup Options.** Previously this needed to be manually disabled in Offline HTML. The UseTimeLogBackground Sync option determines if the technician's coordinates are automatically uploaded to the audit_timelog table with a background sync to the middle-tier anytime they time in, time out, or delete a time-in. The default value is **True** . Select **False** if you do want the coordinates automatically uploaded to the audit_timelog table. This option is disabled if UseTimeLog is set to False.

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[26] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620257/Purchase+Order+Settings

	Description
MT-769	**A SetCallerDetailsOnNewCall setup option has been added to the Service Call Settings section in MobileTech Admin Setup Options.** The new SetCallerDetailsOnNewCall setup option determines if the caller detail fields are enabled on the New Call form. The caller detail fields include Caller Name, Caller Email, and Caller Phone. The default value is **False**. Select **True** to enable these fields. See Service Call Settings[27].

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27 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6625776/Service+Call+Settings

	Description
MT-770	**A RoundInitialTimeInOut setup option has been moved to the Time Log Settings section in MobileTech Admin Setup Options.** Previously this was manually set up in Offline HTML. The RoundIntialTimeInOut setting determines if rounding is applied to the *initial* Time In and Out values instead of using actual time. The default value is **False**, which indicates that the actual time is used when the MobileTech user initially times. When set to **True**, the initial values are rounded based on the *TimeLogRoundingInterval* setting. See <u>Time Log Settings</u>[28]. > ⚠ **IMPORTANT** > If you previously had set up Offline HTML to display the rounding, you will need to set this up in MobileTech Setup Options. You won't have to update this again for any other upgrades as this will be saved as a setup option.
MT-771	**The Quadra Integration setup has been moved to MobileTech Admin in MobileTech Admin Setup Options.** Previously this had been a multi-step manual setup. The MobileTech/Quadra integration allows field technicians to generate Quadra recommendations directly from the MobileTech appointment completion process. Technicians can then view that recommendation from within ERTH's Quadra mobile application and turn that into field quotes and future service call work in Signature/MobileTech. See <u>Quadra Integration</u>[29]. Once you **save** the Setup Options window after setting up the integration, the following Quadra Objects are created: • View: FTQuadraRecommendationTemplateLookup • Trigger: QuadraRecommendationTemplateTrigger • Stored Procedure: WSMobileLoadQuadraRecommendationTemplate > ⚠ **IMPORTANT** > If you previously had Quadra installed, you will need to add the Quadra database name in the Quadra Integration section of the Setup Options window so that the view and triggers are created.

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[28] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620247/Time+Log+Settings
[29] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620137/Quadra+Integration

	Description
MT-775	**An AllPreviousWeekEntries setup option has been added to the Mobile Device Global Settings section in MobileTech Admin Setup Options.** This new option provides the ability to limit technicians to entering time for the current week only. The default value is **True**. See <u>Mobile Device Global Settings</u>[30] for more information. **True**: Technicians are able to create and edit time entries for the previous week. **False**: Technicians can only enter time entries for the current week. ⚠ If you are using Manager Approval for time sheets and the manager rejects an entry from the previous week, the MobileTech user will not be able to update the entry.
MT-781	**A LogError setup option has been added to the MobileTech Global Settings section in MobileTech Admin Setup Options.** This new option determines if MobileTech errors are emailed to the AdminEmailAddress as well as saved in the Event Log. The default value is set to **Event Log and Email Admin**, errors are saved to the event log and emailed to the AdminEmailAddress. If set to **Event Log Only**, the errors are saved only to the Event Log and no emails are sent. See <u>MobileTech Global Settings</u>[31].
MT-835	**A ShowRelatedAppointmentsOnCompletion setup option has been added to the Service Call Settings section in MobileTech Admin Setup Options.** This new option allows technicians to view related appointments for the service call or job, regardless of the assigned technician from the Appointment Completion form. Technicians can also access related appointments from the Appointment form on the Related tab. The default value is **True**. See <u>Service Call Settings</u>[32] and <u>View Related Appointments</u>[33]. **True**: The Related Appointments button is displayed on the Completion form. **False**: Technicians do not see the Related Appointments button on the Completion form.

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[30] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620245/Mobile+Device+Global+Settings
[31] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620240/MobileTech+Global+Settings
[32] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6625776/Service+Call+Settings
[33] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6625725/View+Related+Appointments

	Description
MT-875	**An IncludeAllCallNotesWithHistory setup option has been added to the MobileTech Company-Specific Settings section in MobileTech Admin Setup Options.** This new option provides the ability to include all service call notes when historical records are requested. The default value is **False**. See MobileTech Company-Specific Settings[34].

A new Other Notes section has been added to the History form The notes are separated by [DATE1 TIME1 - MDFUSRID - Note_Service_Index]. The notes display on the History tab in the Other Notes section. The notes are pulled from the SV000805 table. The Other Notes section displays up to 100,000 characters. If the combined notes in the Other Notes section are longer than the allowed 100,000 character length, the displayed notes are appended with "..." to indicate to the user that the message is too long to display.

MT-858	**An AllowCreateSublocations setup option has been added to Equipment Settings in MobileTech Admin Setup Options.** This new option determines if a technician can create sublocations from their device. The default value is **False**. Set to True to allow technicians the ability to create unique (for the location) sublocations for equipment. With this set to True, technicians can also edit the description and barcode (if

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34 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620242/MobileTech+Company-Specific+Settings

	Description
	enabled) for an existing sublocation. See Equipment Settings[35] and Create or Change an Equipment Record[36] for additional information. The AllowCreateSublocations option is enabled if Use Validation for Sublocations is marked in Service Management Service Options. (Microsoft Dynamics GP > Tools > Setup > Service Management > Module Setup > Setup Options).
MT-895	A **RequireLaborForTechnicianActivities** setup option has been added to Labor Settings in MobileTech Admin Setup Options. This new option provides the ability to require a labor transaction to be entered before technician activities can be completed. The default value is **True**. When set to False, the technician can complete the technician activity without having to enter a labor transaction. See Labor Settings[37].
MT-1042	An **AllowRescheduleAppointments** setup option has been added to Service Call Settings in MobileTech Admin Setup Options. This new option determines if technicians can change the start date and time of service call appointments and technician activities. The default value is **True**. See Service Call Settings[38]. ⚠️ • This setting does not apply to creating new service appointments or technician activities. • This setting also does not apply job appointments. The job appointment start date and time cannot be changed.
MT-1106	Two new setup options for auto-populating the call type and/or problem type when creating a new service call have been added to Service Call Settings in MobileTech Admin Setup Options. See Service Call Settings[39]. • **DefaultCallType**: Determines the default call type for new service calls. The default value is <none>. Select the default call type from the drop-down list of available call types. The only call type not included is MCC. • **DefaultProblemType**: Determines the default problem type for new service calls. The default value is <none>. Select the default problem type from the drop-down list of all problem types.

Resco Inspections

Case #	Description
MT-649	We've added a warning icon to indicate when an Inspection Report is required. This displays when the Inspection validation is set to REQUIRED. This icon displays on the following lookup views and applies to

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35 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620253/Equipment+Settings
36 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620519/Create+or+Change+an+Equipment+Record
37 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620261/Labor+Settings
38 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6625776/Service+Call+Settings
39 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6625776/Service+Call+Settings

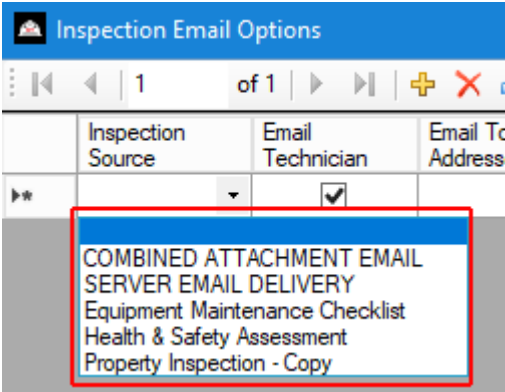| Case #	Description
	Service Call, Job, and Equipment required inspections. See Inspection Validation During Appointment Validation Check (optional)[40] for information on setting up the validation levels for inspections. • Associated Inspections • Answered Inspections • Completed • Email Reports • In progress or completed • In progress

MT-668	Additional new features from **Resco's Winter 2022 Release**:
	
	• Report Designer user interface improvements:
	  • Design grids more conveniently
	  • Understand properties better
	• Inspections
	  • Map questions to fields
	  • Buttons can create instances of repeatable groups
	  • Omit unanswered questions from reports
	
	For information including a YouTube demonstration from Resco, please go to https://docs.resco.net/wiki/Releases/Winter_2022#Report_Designer_user_interface_improvements.

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[40] https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620158

Case #	Description

MT-670	Additional new features from **Resco's Spring 2023 Release**:
	
	• Questionnaires
	    • Data mapping in bulk
	    • Multiple images limit
	    • Multiple images display
	• Reports
	    • Image size
	    • Easy access to variables
	    • Report preview
	    • More control over page size
	    • Clone style
	• Woodford/platform
	    • Nicer app UI
	    • Form designer UI overhaul
	    • Calendar: week selector
	    • Form localization improvements
	    • Design Size button removed from view editor
	    • Sync download performance tips
	    • Rich text tab and process flow tab technology change
	    • Windows 8.1 app support change
	
	For information including a YouTube demonstration from Resco, please go to https://docs.resco.net/wiki/Releases/Spring_2023.

Case #	Description

MT-678, MT-803, MT-810	**New Inspection Report Setup Options**
	
	We've added new setup options for the Inspection Report to the Report Settings section in MobileTech Admin. See Report Settings[41].
	
	• **InspectionReportEmailMode: Determines how inspection reports are automatically sent.**
	
	⚠ Emails are sent only if Inspection Email Options for the given inspection template and SMTP settings are set up in Inspection Email Options. Technicians will only receive the reports if the Email Technician checkbox is marked in Inspection Email Options for the given inspection template. See Set Up Email Options for an Inspection Report (optional)[42] .
	
	    • Do not send inspection report emails: The inspection report is not automatically sent. The technician can still manually send the report from the device. This is the default value.
	    • Send when inspection report is first created: Sends the inspection report when the technician syncs after creating the report.
	    • Selected or entered by technician: Sends the inspection report(s) related to an appointment when the appointment is completed to the designated recipients in Inspection Email Options. The technician can also select one or more Contact email addresses to send the inspection report(s). The technician can also enter new contacts and customers' email addresses.
	• **ReportEmailAttachmentMode: Determines if multiple attachments are included in one email upon appointment completion.** This option is enabled if InspectionReportEmailMode is set to "Selected or entered by Technician".
	    • Send individual emails per report attachment: Attaches only one inspection report per email when the appointment is completed. If multiple inspection reports exist for the appointment, an email is sent for each inspection report. This is the default value.
	    • Combine inspection attachments to one email: Attaches all inspection reports related to the appointment when the appointment is completed.
	    • Combine all report attachments into one email: Attaches all inspection reports and the call, appointment, and/or job appointment summary reports related to the appointment when the appointment is completed. This option does not include field invoices. Field invoices will be sent as a separate attachment.
	
	⚠ To be able to attach the inspection and summary reports to one email, both *ReportEmailMode* and *InspectionReportEmailMode* need to be set to "Selected or entered by Technician."

MT-776	We've added wild card character functionality to appointment and inspection linking in Offline HTML if you (optionally) limit to a specific value such as a service call type or equipment type. This would provide you with the ability to group similar entities. The wild card character's default value is %, however, you can edit this by updating the wildCardChar variable value found in utility\questionnaire\link-appointment.js. This

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41 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620131/Report+Settings
42 https://docs.key2act.io/pages/viewpage.action?pageId=149520569

Case #	Description
	wild card character can be used on any field for the service call, job, or equipment. See Inspection Validation During Appointment Validation Check (optional)[43].

> ⚠ The wild card character can only be added to the beginning or end of the entity's field value, For example, %AMP SERVICE or AMPSERVICE%. Not allowed would be AMP%SERVICE.

An example of how this might be used so that anything equipment type that ends with AMP SERVICE or anything that has ROOF TOP UNIT with text before and/or after in the name:

```
equipment: {
    WARNING: [],
    REQUIRED: [],
    equipmenttypeid_name: [
        {
            value: "%AMP SERVICE",
            inspections: { REQUIRED: ["General Amp Service Inspection"] }
        },
        {
            value: "%ROOF TOP UNIT%",
            inspections: {
                REQUIRED: ["General Inspection"],
                WARNING: ["General Inspection for Roof Top Units"]
            }
        }
    ]
}
```

Case #	Description
MT-807	When setting up Inspection Email Options, you will now find that the Inspection Source drop-down list is sorted alphabetically for the templates that you've added in Resco Cloud. Note that the COMBINED ATTACHMENT EMAIL and SERVER EMAIL DELIVERY options remain pinned to the top of the list. You can also type the first few letters of the template name to navigate to that section of the list as well as auto-fill the Inspection Source field. For more information about the Inspection Email Options, see Set Up Email Options for an Inspection Report (optional)[44].

43 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620158
44 https://wennsoft.atlassian.net/wiki/spaces/MT95/pages/6620337