Signature 2024 (18.7) Readme

Release Version: 2024 (18.7.9g923)
Release Date: November 2024

Signature Installation

IMPORTANT: You must be on the Microsoft Dynamics GP October 2024 (**18.07.1756**), November 2024 Year End (**18.07.1765**), Canadian Payroll Update (**18.07.1793**), or the January 2025 Payroll Tax Round 2 and Hotfix (**18.07.1801**) release, before installing Signature 2024. You can verify version information by checking the About Microsoft Dynamics GP window. If you are not on either version, do not install Signature.

You can upgrade to Signature 2024 from Signature 2018 R4 or higher. You can verify version information by checking the About Microsoft Dynamics GP window. If you are not on this version, do not install Signature.

> Registration keys need to be updated after upgrading to Signature 2024.

Signature is compatible with the new Microsoft Dynamics GP multi-tenant implementation feature and can be installed on any Microsoft Dynamics GP system database. However, the following Signature products cannot be installed on multiple system databases on the same server: Customer Portal, TimeTrack Excel Client, and MobileTech.

> The size of the SQL log file is no longer shrunk during the installation and upgrade processes. You must have enough available disk space to accommodate SQL log growth of more than at least three times the size of your company database.

> **IMPORTANT:** For data integrity, all service invoice batches need to be posted before upgrading.

SSRS reports are deployed to a new Signature folder location, such as Signature Service, Signature Job Cost, etc.

- **If you have any modified reports**, you may need to redo your changes if the core report has been updated with this release. By having both versions available, you will be able to compare your modified reports with the updated reports to determine if you need to modify the report(s) in the Signature location. You can manually remove the WennSoft folders when you are done.
- **If you have custom reports**, you will need to update the path location in the WSRepts table.

> **CAUTION:** Do not set up identical sequential NEXT Numbers for Inventory, Payables, and Payroll transactions in Microsoft Dynamics GP Setup. This will cause issues if you have transactions with the same document number on the same service call. In addition to deleting the specific transaction, the other transactions will also be deleted, causing Service to be out of balance. We recommend using a prefix for Next Numbers like IV000001. Using unique prefixes will prevent the identical Next Number issue.

New Signature users should refer to the *Signature* Installation and Upgrade[1] guide for installation instructions.

Compatibility

To find a complete list of system requirements across all the Signature modules, please refer to the Signature System Requirements document found on the Product Download page on Signature Resources at https://www.wennsoft.com/wsportal/product-downloads.

Signature 2024 is compatible with the following:

- Microsoft Dynamics GP October 2024 (**18.07.1756**), November 2024 Year End (**18.07.1765**), Canadian Payroll Update (**18.07.1793**), or the January 2025 Payroll Tax Round 2 and Hotfix (**18.07.1801**) release
- Dexterity 18.00.0028.000
- Alternate Window and Report Manager 2024
- eOne SmartConnect 21.1.0.1545
- eOne SmartList Builder 18.07.0062
- Signature Equipment Management 2024 (18.7.9g906)
- Signature Product Registration
- eTimeTrack Web Service 2018 R6 (18.04b06g626)
- Job Import 16.1.3
- Excel TimeTrack Client 16.0.1.8
- SmartConnect Integration Manager 2024

MobileTech

- For additional compatibility information, see the MobileTech 2024[2] readme documentation.

Schedule

- For additional compatibility information, see the Schedule 2024[3] readme documentation.

Signature Agent

- Signature Agent 2.5

Portals:

- Portal Web Service 16.0.01.05
- Portal Security 16.0.01.08
- Portal SMS Integration 18.2.1
- Customer Portal website application 16.0.1.01

Incompatibility

The following features in Microsoft Dynamics GP are not supported in Signature:

- RM Receivable Voiding process is not compatible with posted Signature invoices (created in Service Management, Job Cost, or Equipment Management).
- Scheduled Payments functionality in Receivables.
- Batch Service Invoicing does not support payment terms.
- Lockbox

1 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104824946/Installation+and+Upgrade
2 https://wennsoft.atlassian.net/wiki/spaces/MT2024/overview
3 https://wennsoft.atlassian.net/wiki/spaces/sched2024/overview

- When using the Payables Transaction Entry Distribution window, for Service Management or Job Cost transactions, you cannot use a Distribution Type of CASH, PAY, or UNIT.
- Multi-bin Inventory
- Customer Combiner and Modifier
- Vendor Combiner and Modifier
- Pay Code Start and End Dates
- The Professional Services Tools Library that is included with Microsoft Dynamics GP modifies or combines data within GP. The data is not changed within Signature. Using the Professional Services Tools Library, you could modify, change, or delete things that can never be fixed. There is no UNDO button.
- We do not test our Signature solutions for compatibility with Microsoft Dynamics GP Project, Field Service, or HR Payroll.
- Using Letter Writer Assistant to merge data from Microsoft Dynamics GP to Microsoft Word's Mail Merge
- Copying of purchase orders using Copy PO function
- Purchase order returns with serialized inventory items
- Date Effective Tax Rates
- Allowing summary-level tax edits
- Specifying tax details for automatic tax calculations in Company Setup is not supported.
- Calculating tax rebates
- Calculating taxes in General Ledger
- Merging trade discounts and markdown distributions in Sales
- Merging trade discounts and markdown distributions in Purchasing
- Calculating terms discount before taxes
- Promotional and free items
- Service transactions using accounts set
- Transaction batches with a frequency other than single-use
- Payables recurring batch / entering cash receipts assigned to a job in a recurring batch
- Pay Code Modifier
- Automatic Overtime payroll option
- PO Tolerance - shortages
- Intercompany fixed asset transfers
- Editing Payroll history records
- Purchase order receivings with shipments followed by invoice match when the tax is included with the item price.
- Microsoft added a cost warning in Microsoft Dynamics GP 2010 and 2013 for cost variances. If you invoice a single shipment using more than one invoice and the costs of those invoices differ, you will get a warning that your costs don't match. Posting updates the total quantity of the purchase receipt with this cost and your inventory and general ledger will not balance. You can proceed with the transaction, save it to a batch, or delete it. Only this warning is new, this is not a change to functionality. For more information about this warning, see the Dynamics GP Support and Services Blog.
- Assigning suggested sales item to an item
- Analyzing suggested sales items
- Using document attachments in Payables Management transactions such as payables invoice, payables finance charge, payables miscellaneous charge, and payables credit memo.
- Purchase requisitions
- Payroll Timecard workflow (introduced in Microsoft Dynamics GP 2013 R2)
- The Self-Service role, in the Select GP Home Page window off the Customize Home Page window, is not compatible with accessing TimeTrack's Time Card Entry window.
- Procurement and Time Management content areas in the Customize Home page window.
- Using the Report Assignments window to assign Signature SRS reports to print from specific transaction windows.
- When copying journal entries from Excel and pasting them into the General Ledger transaction entry window, the account entries, debits, and credits come through, but you will need to enter the Signature information manually.

- Workflow for SharePoint
- The *Warn if vendor has existing purchase order* option is not compatible with the Contract Agreement window in Job Cost.
- Project Level Invoicing does not support multi-currency or payment terms with discounts.

Additional Product Incompatibilities

In general, Signature products may not be compatible with Microsoft Dynamics GP's additional products. The following products do not support Signature transactions:

- Sales Order module - SOP returns from invoice documents in Service Advantage
- PO Generator

Installation Notes

- This product is installed using the Signature installation wizard. All users must log out of the system before you begin the installation. To open the installation wizard, download and launch the application file on the server. On the Select to Install or Upgrade window, select to upgrade Signature products. Run the Server and Client installation. Run the Client Only installation on all additional clients after upgrading the server. For complete installation instructions, refer to the *Signature Products Installation, Upgrade, and New Features* guide.
- DO NOT remove WennSoft from the **DYNAMICS.SET** file at any time during the installation.
- For a successful upgrade, do not attempt to process more than 10 company databases at the same time in Signature Utilities.
- SQL Reporting Services (SSRS) are 64-bit compatible.
- Signature SSRS reports do not support SharePoint Integrated – Report Server Mode.
- If your company will be using an SSL with HTTPS, you will need to install the latest Signature Registration app. This is compatible with TLS 1.2 Protocols. For more information, see Enable Signature Registration Keys[4] in the *Signature Installation and Upgrade Guide*.

IMPORTANT:

- **Disable any security software before installing Signature Registration.** Remember to re-enable this once the installation is complete.
- **Before upgrading Signature:**
  - **Refrigerant Tracking Leak Rate Analysis:**
    - Make note of the Refrigerant Tracking Leak Rate Analysis Method that you are using in the Signature Service Options Setup window. After upgrading, verify in this window that your setup option is still correct. The form procedure GetRefrigerantLeakRateMethod has been updated to reference Record 2 instead of Record 1. SMS-1366
    - Refrigerant Tracking leak rate calculation has been updated to use the refrigerant released value entered in the Accidentally Released field. Previously, the calculation used the Refrigerant Added value. See Refrigerant Tracking[5] and Choosing Service Options[6]. SMS-1971
- **After upgrading Signature:**
  - **MobileTech users:** You will need to upgrade to MobileTech 2024.
  - **Schedule users**: You will need to upgrade to Schedule 2024 for the newest features.
  - **MobileTech and Refrigerant Tracking users:** After upgrading, for the Refrigeration Equipment Type 6 to be available in MobileTech, you will need to refresh lookups in MobileTech Admin (MobileTech Admin > Tools > Refresh Lookups) and have technicians sync their devices.

4 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104825096/Enable+Signature+Registration+Keys
5 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104828087/Refrigerant+Tracking
6 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104826918/Choosing+Service+Options

  - **Service Quick Connect SmartList users:** After upgrading, you will need to delete and reimport the Service Quick Connect SmartList. We've updated the Quick Customer to use WSReserved_CB9 in the SV00100 table. SMS-1604
    During an upgrade:
    - If MobileTech is not present, all values from UDF3 will move to UDF9
    - If MobileTech is present and WsMobileTechOptions UseFieldInvoicing is False, all values from UDF3 will move to UDF9.
    - If MobileTech is not present and WSMobileTechOptions UseFieldInvoicing is True, no changes will be made.
- **TimeTrack users export data to a 3rd party payroll module:** We've updated the Exporting TimeTrack Data process so that the commit process is now run before exporting the file. Transactions that had errors and were not committed (and still in table WS10702) are removed from table WS50000. See Exporting TimeTrack Data to a Third-Party Payroll Module[7].
- **SmartConnect users:**
  - The Signature 2018 R5 release requires SmartConnect nodes to be re-installed, as parameter and node logic are often modified as part of a product update. If you have custom SmartConnect nodes created for you by WennSoft, you'll need to work with your Customer Success Manager to schedule an update of custom nodes, as part of your upgrade process.
  - To provide more precise descriptions for errors returned when using a SmartConnect node, you will need to set up Read Access to the SmartConnect database for the user that was set up to run the integrations. In SQL Server Management Studio, the user needs to be mapped to SmartConnect and to have at least the **db_datareader** Database Role Membership. SMS-477
- **Deprecation Note:**
  - A new Job Close window has been added with Signature 2018 R4. To this end, we will deprecate the original Job Close window. The Signature 1804b06 release was the final version for the legacy Job Close window.
  - Process Service Invoicing has been deprecated across two Signature releases: 2018 R3 and 2018 R4. We will make no changes to the base feature for this reason. Any critical defects identified in this feature will have to be handled as hotfixes, as needed. Our new Service Batch Invoicing process is replacing Process Service Invoicing. The Signature 1804b06 release was the final version for the Process Service Invoicing window.
- **Add-on-the-fly functionality has been conditionally removed from the Transfer to Job process.** Based on customer feedback, add-on-the-fly functionality in the Transfer to Job window is now disabled. While this feature is disabled, SMS users will no longer be able to add Jobs and/or Job Cost Codes via the Transfer to Jobs window. If you require this functionality, it can be re-enabled by adding the following line to the Dex.ini file found in the Data folder of your Microsoft Dynamics installation. *EnableTransferToJobCreateJob=TRUE*
- **After upgrading or installing, update the dex.ini to include REVALJEINDETAIL=TRUE** so that purchase price variance entries are created in detail. 23366
- **Beginning with Signature 2018,** the email paging function has changed to use WennSoft's communication platform.
- **If you are using Job Cost and will be switching to the Revenue Performance Obligations revenue method,** you can't create fixed change orders on cost plus jobs.
- **For SM document attachments to be written to a physical file location,** WRITE permission must be given to the folder(s) where the attachments will be copied to for all users, MobileTech and Service Management, who will be attaching files. In addition, the path to where the attachments are to be stored needs to end with a backslash. 21559, 21564, 22021
- **We strongly advise against the practice of saving invoices with committed costs to batches,** as this may result in posting issues. When an invoice with committed costs is saved in a batch, the invoice distributions are NOT recalculated when the purchase order costs are received.

7 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104832372/Exporting+TimeTrack+Data+to+a+Third-Party+Payroll+Module

- **Signature Portal users only** – If any modifications have been made to your portal websites, you must make a copy of your modifications BEFORE upgrading your Signature portal(s). Your modifications can be recreated after the upgrade is complete.
- **If you intend to use Job Appointments and you also use TimeZone views in Service Management, your users must use the Alternate Customer Maintenance window to set up GP Customers and Addresses/ Locations.** Failure to use the Alternate Customer Maintenance window will result in job appointments not being properly displayed in Schedule. JC-96
- **For users who post service invoices with committed costs before posting the receiving transactions batch.** When you are ready to post the purchase order batch, you will need to recalculate the transaction distributions to avoid any posting discrepancies. To recalculate the receivings transaction distributions:
    a. Go to *Transactions* > *Purchasing* > *Purchasing Batches*.
    b. Select the **Batch ID** and then select *Transactions*.
    c. In the Receivings Transaction Entry window, select **Receipt No**.
    d. Select *Distributions*.
    e. In the Purchasing Distributions Entry window, select *Default*.
    f. Select *Yes* to reset to clear the existing entries and restore the default distributions.
    g. Select *OK* and then select *Save*.

Sample Data

Sample data can be installed for Job Cost and Service Management as part of the Fabrikam lesson company. Sample data can only be installed on a new installation of Fabrikam. If you have an existing installation of TWO, Inc. and the Fabrikam lesson company with sample data, we recommend that you upgrade your existing data.

Miscellaneous

- Immediately after installing Signature, exit, and restart Signature Utilities before attempting to import any data.
- When installing or upgrading on Microsoft SQL Server, we recommend that you stop and restart the server when the installation or upgrade is complete.
- Extended pricing is not supported for expense and travel transaction types through time entry in TimeTrack, TimeTrack Excel Client, and MobileTech.

Bug Fixes

The following issues have been fixed:

Service Management

Case #	Description
SMS-2306	The Job Lookup form accessed from the Service Call window now filters as expected.
SMS-2376	The Item Stock Inquiry window now displays returns as expected.
SMS-2403	Users will no longer receive deadlock errors when creating MCC calls.
SMS-2410	When using the Move Service Call utility, the note attached to a quote is now moved as expected.

Case #	Description
SMS-2414	When importing a service call using Signature Utilities, the fields CREATDDT, CRUSRID, MODIFDT, MDFUSRID, and Modified_Time in SV30301 are now filled.
SMS-2445	Service call quotes on MC/MCC service calls are no longer deleted when editing the user-defined 3 or 4 fields on the service call and then saving.
SMS-2514	When zooming on the Job Number field on the Service Manager window for a closed call, the Job History window now opens. Previously, users received a message stating that the job doesn't exist.
SMS-2522	Under the Binary Stream Integration section of WSMobileProcessFieldPO, the Transaction_Type is now being set correctly. It was reported that it was always being set to SERVICE, even if Job POs are enabled in MobileTech.
SMS-2524, SMS-2750	When using the Auto Roll Calls forward and also having time zones enabled, calls are now rolled forward as expected.
SMS-2558	Receivables batches can no longer be deleted if there are any maintenance invoices in the batch. Individual maintenance invoices can no longer be deleted.
SMS-2562	Notes added to Added Cost entries are now visible in the Costs Inquiry window for a closed service call.
SMS-2576	When you close out of the Service Invoice window without saving the invoice, the service invoice in table SV00700 is now removed as expected.
SMS-2633	If a piece of equipment is linked to a contract, the equipment master record can not be deleted.
SMS-2777	We've updated the Service Call with Costs report (Reports>Service>Service>Service with Cost) to include unposted saved purchase orders.
SMS-2806	Mapping fields with Smart Connect for purchase orders is now updating the cost code description as expected.
SMS-2840	Users can now drill down to posted labor costs entered from a plus button entry on the Service Call Status window.
SMS-2884	When there is a general ledger transaction credit pending posting, the costs are now reflected correctly on the unposted column.
SMS-2937	The Service Maintenance Options Visit Wizard is now adding the location name as expected when creating service calls.

Case #	Description
SMS-2938	Committed Cost is now updated when a saved purchase order related to a service call has a shipment or shipment/invoice transaction for one line posted.
SMS-2974	A Technician Team can no longer be deleted if there is at least one technician assigned to the team. You will need to unassign the team from all technicians before the team can be deleted.

Job Cost

Case #	Description
JC-507	On the SSRS Job Committed Costs report, when lines are combined, the totals are now correct.
JC-570	The Unposted Column no longer includes unposted journal entries when using the WIP Reconcile tool.
JC-571	Transactions with $0 but have a profit amount based on units can now be billed.
JC-574	The WennSoft alternate Item Transaction Entry window now displays the fields as expected when the window is maximized.
JC-583	We've updated an error message that users receive if the invoice amount exceeds the expected contract amount. The original error message mentions a specific contract type when this applies to all contract types.
JC-592	Saved purchase orders now show as unposted costs in the Job Status window.
JC-609	In the Close Job window, you can now compare against the Actual Close Date as expected.
JC-654	When a purchase order on a job is printed, the cost automatically moves to Committed Cost. If the purchase order is updated, a new line, or change of line qty, the Committed Cost will be updated.
JC-676	Committed Cost is now updated when a saved purchase order related to a job has a shipment or shipment/invoice transaction for one line posted.
JC-724	We've fixed an issue with the Project Status window where a project with no active jobs assigned to it is showing unposted costs.
JC-733	We've fixed an issue where running the wsiJCChangeOrdersDetailMSTR procedure was causing the change order amount in JC01001 to increase.

Case #	Description
SIG-43	We've fixed an issue with POs on Job Appointments in MobileTech and Schedule were posting to the wrong account number.

TimeTrack

Case #	Description
TT-245	If the employee does not have a manager designated in the Registered Users window and Manager Approval is turned on in Setup Options, the Submit for Approval button is now disabled.
TT-257	When editing a payroll transaction entry against a job with a paycode without a pay rate to a paycode with a pay rate, the new pay rate is now updated in Job Cost. Note that this occurred with the options Display Pay Rate on Trx and Edit Financial Fields had to be turned off in Payroll Options.
TT-258	Only GP User IDs (users) assigned to the company can be selected in the TimeTrack Registered Users Setup window.
TT-259	We've updated the wsTT_Import_Validate_TimeTrack_Fields stored procedure to prevent a looping issue that was reported when changing union rates.
TT-261	The Time In/TimeOut feature in Time Card Entry is now correctly calculating the hours. It was reported that a time in of 7 am and a time out of 9 am was calculating to 1.99 instead of 2.
TT-264	We've updated the wsVerifyTTTrx SQL stored procedure's @EWS_Equipment_ID and @Equipment_ID variables to be 31 characters instead of 30 to eliminate errors if the equipment ID in the table is at 31 characters. It was reported that a user had a service call using equipment with an equipment_id with 31 characters. The character difference was preventing a TimeTrack transaction from posting.

New Features

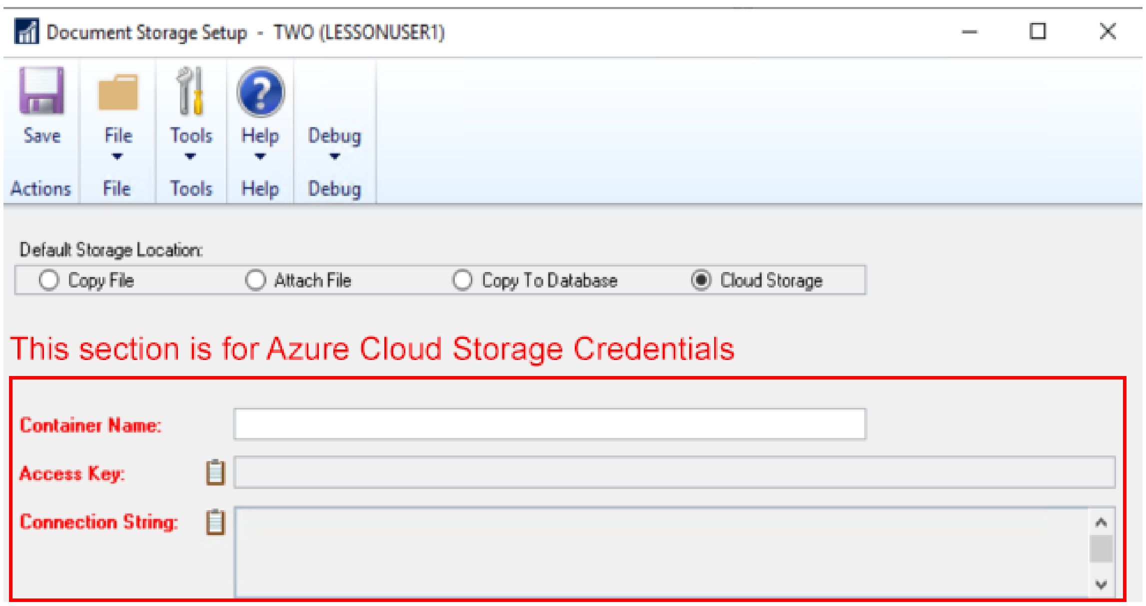
The following new features have been added to Signature:

Service Management

Case #	Description
SMS-2125	On the Contract Mass Renewal window, after entering the Contract Expiration Date Range, when you mark the Renew Contracts With Open Service Calls checkbox, the scrolling window will automatically refresh.

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SMS-2354</td><td>You can now set a default document storage location in the new Document Storage Setup window. This new window is found in Service Management settings (Service Management > Module Setup > Document Storage Setup) and Job Cost settings (Job Cost > Job Cost Settings > Document Storage Setup). See Designating the Default Document Storage Location (Optional)[8][9].

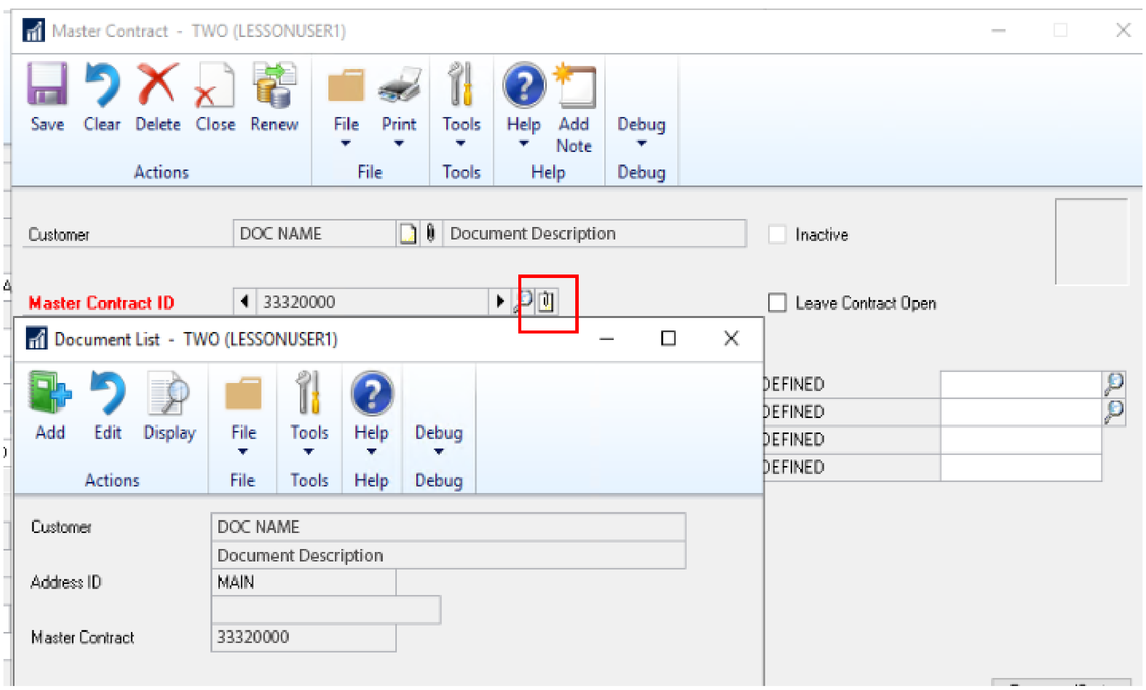
When Copy File, Attach File, or Copy To Database is set as the default storage location, this option is marked for your users in the Document Maintenance window when uploading an attachment, however, users can select a different option if needed. Previously, users would have to select the correct storage location with every uploaded attachment. users can change the storage location in Document Maintenance.
When the default option is set to Cloud Storage, the storage location cannot be changed in the Document Maintenance window.



</td></tr>
<tr><td>SMS-2376</td><td>If the default salesperson on the customer location has been marked inactive, when creating a new contract or service call, the Salesperson ID field will be blank. An inactive salesperson cannot be added to a new contract or service call. A salesperson is marked as inactive in the Salesperson Maintenance window. Cards > Sales > Salesperson</td></tr>
</table>

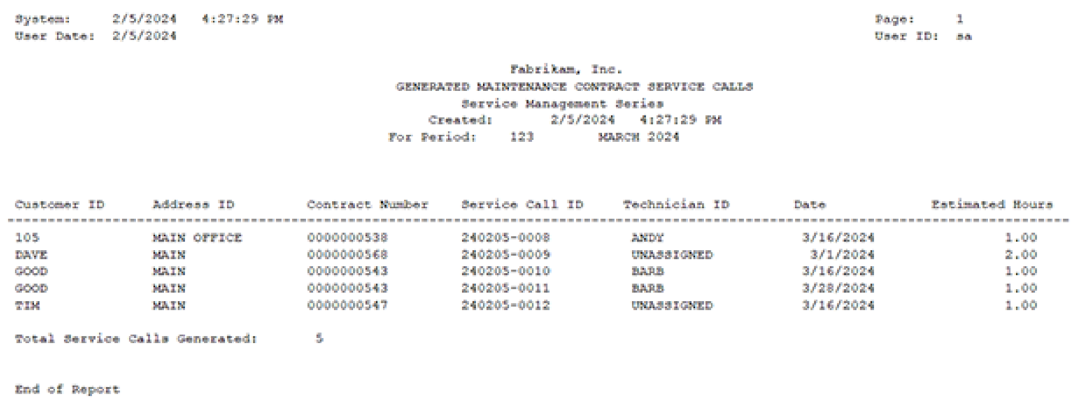
8 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/553648147/Designating+the+Default+Document+Storage+Location+Optional

9 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/553648147/Designating+the+Default+Document+Storage+Location+Optional

Case #	Description
SMS-2566, SMS-2801	We've added a Microsoft Azure Cloud Storage option (with your self-hosted storage) for attachments in Signature (including Schedule and MobileTech). Azure Cloud Storage provides secure storage for data in the cloud. Cloud storage requires an Advanced Document Management license. See Setting Up Azure Cloud Storage[10][11]. Contact WennSoft Sales for pricing information. For information about Azure Cloud storage, see Introduction to Azure Storage[12].
SMS-2415	Users can no longer void a PM transaction associated with a closed service call because this can cause the WIP to be off balance. A message now displays when the user attempts to void the transaction: "This transaction cannot be voided. (For example: On closed service calls, on service calls with saved invoices, the jobs are closed, and/or invoiced on Cost Plus jobs." See Entering Payables Transactions in Service Management[13][14].
SMS-2427	You can now add document attachments to the Master Contract window. The WSDOCS table has been updated to include a Master Contracts column and a folder has been added for master contracts. The paperclip icon displays to the right of the Master Contract lookup icon. **Click here to view screenshot.** 

10 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/510132229/Setting+Up+Azure+Cloud+Storage
11 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/510132229/Setting+Up+Azure+Cloud+Storage
12 https://learn.microsoft.com/en-us/azure/storage/common/storage-introduction
13 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104830996/Entering+Payables+Transactions+in+Service+Management
14 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104830996/Entering+Payables+Transactions+in+Service+Management

Case #	Description
SMS-2440	We've updated the Maintenance Contract Service Call report to be more space-efficient. The report now displays and prints in landscape mode. **Click here to view screenshot.**



System: 2/5/2024 4:27:29 PM
User Date: 2/5/2024

Page: 1
User ID: sa

Fabrikam, Inc.
GENERATED MAINTENANCE CONTRACT SERVICE CALLS
Service Management Series
Created: 2/5/2024 4:27:29 PM
For Period: 123 MARCH 2024

Customer ID	Address ID	Contract Number	Service Call ID	Technician ID	Date	Estimated Hours
105	MAIN OFFICE	0000000538	240205-0008	ANDY	3/16/2024	1.00
DAVE	MAIN	0000000568	240205-0009	UNASSIGNED	3/1/2024	2.00
GOOD	MAIN	0000000543	240205-0010	BARB	3/16/2024	1.00
GOOD	MAIN	0000000543	240205-0011	BARB	3/28/2024	1.00
TIM	MAIN	0000000547	240205-0012	UNASSIGNED	3/16/2024	1.00

Total Service Calls Generated: 5

End of Report

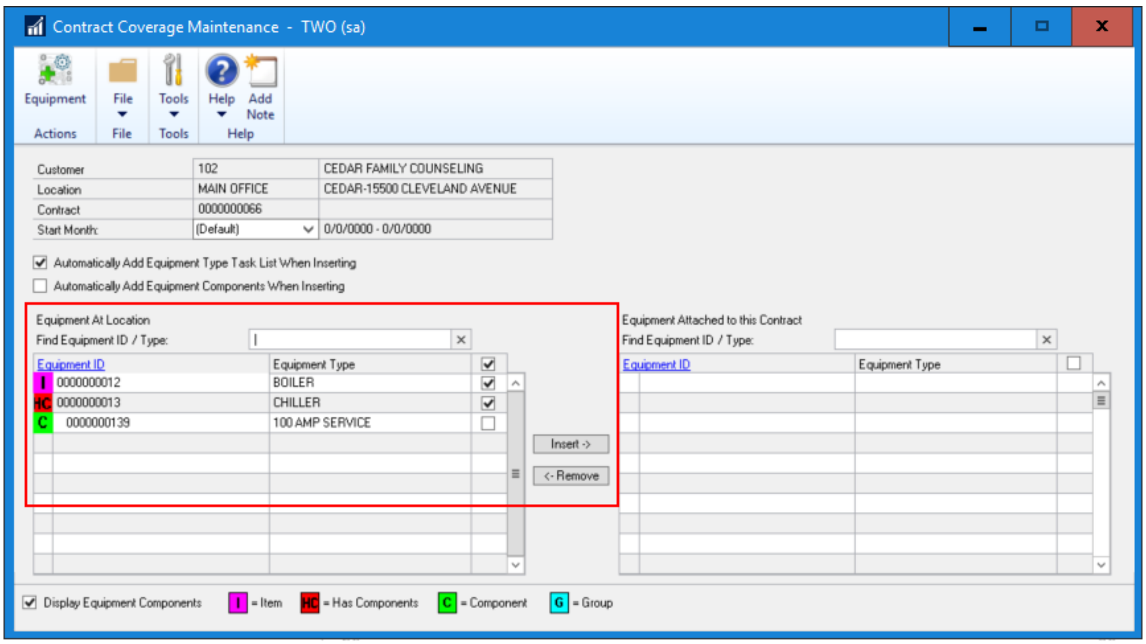
<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SMS-2444, SMS-2624</td><td>

The Contract Coverage Maintenance window has been updated with the following:

- We've added an Equipment ID/Type search field to the Contract Coverage Maintenance window for the Equipment at Location and Equipment Attached to the Contract sections. To clear either Search field, select the "x" to the right of the field to be cleared.
- We've replaced the Insert All and Remove All buttons with checkboxes in each scrolling window. You can mark all equipment by the checkbox to the right of the column titles. Then select Insert or Remove to remove the marked equipment.
- We've removed the pop-up messages. We felt these were redundant based on the selections that you've made for the checkboxes. For example, if you've marked to automatically add equipment components when inserting, the message stating that components were added no longer displays.

The Contract Coverage Maintenance window is accessed by going to Contract Maintenance > Coverage > Equipment. See Using the Contract Coverage Window[15][16].

Click here to view screenshot.



</td></tr>
<tr><td>SMS-2454</td><td>When a user opens the New Service Call window for a customer and the call is then deleted by closing the window without saving, the SV00340 table now updates the Deleted_User_ID, WS_Deleted_Date, and WS_Deleted_Time columns to show that the service call has been deleted. This lets the user audit any gaps in the service call number sequence.</td></tr>
</table>

15 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104829861/Using+the+Contract+Coverage+Window
16 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104829861/Using+the+Contract+Coverage+Window

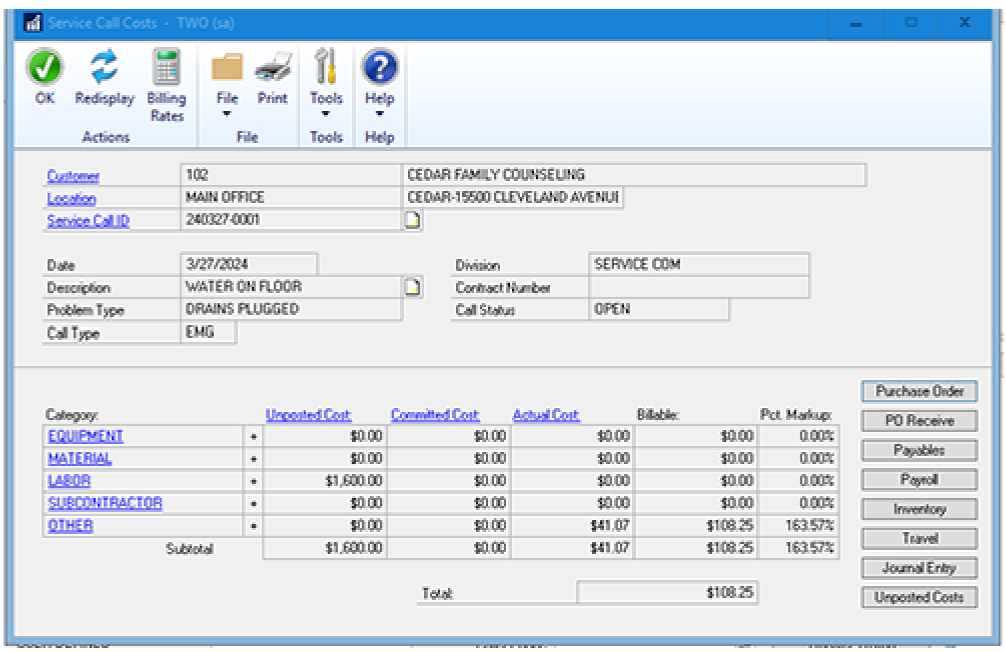
<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SMS-2497</td><td>

We've added a new Service Call Costs window to view current unposted, committed, and actual costs and anticipated billable information in the Service Call Costs window. Margin information is shown; however, tax information is not included. This window also provides zoom capability for each cost category and cost type. This window is similar to the Invoice window, without the creation of an invoice. This window is not available if you are using SOP Invoicing. See <u>Using the Service Call Costs Window</u>[17][18].

Access the Service Call Costs window from the:

- **Service Call window**: Select the *Call Costs* button in the ribbon.
- **Service Manager window**:
  - Select the customer and location. Right-click on a service call in the scrolling window and select *View Service Call Costs*.
  - Select the customer and location. Select the *History* icon. In the Service Call Lookup by Customer window, right-click on a service call in the scrolling window, and select *View Service Call Costs*.

Click here to view screenshot.



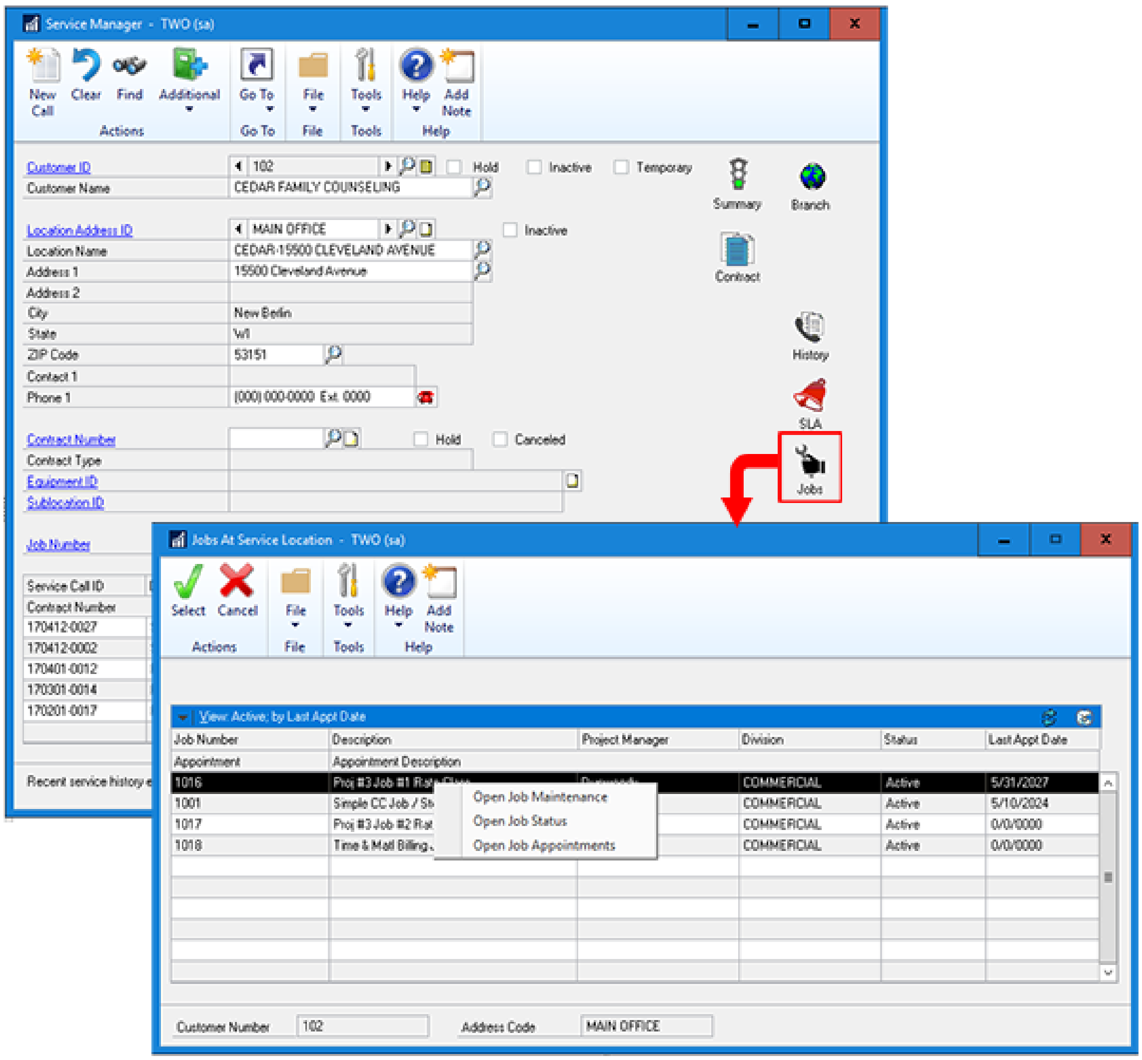
</td></tr>
</table>

17 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/228327445/Using+the+Service+Call+Costs+Window
18 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/228327445/Using+the+Service+Call+Costs+Window

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SMS-2553</td><td>

You can now view all jobs associated with the service location directly from the Service Manager window. We've added a new Jobs at Service Location window accessed by selecting the new Jobs icon displayed on the Service Manager window if the selected service location has at least one associated job. You can also access the Job Maintenance, Job Status, and Job Appointments windows from this new window. For more information, see Viewing Jobs Associated With the Service Location[19][20].

Click here to view screenshot.



</td></tr>
</table>

19 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/248774660/Viewing+Jobs+Associated+With+the+Service+Location
20 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/248774660/Viewing+Jobs+Associated+With+the+Service+Location

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SMS-2619</td><td>We've added the ability to prevent new service calls from being created for on hold customers in Signature and Schedule. You can designate certain users who can bypass this to create a service call if necessary. The new Authorize specific users to add new calls for customers on hold setup option works with the Stop-and-Go Lights setup option in the Service Options window and a new security task ID that must be assigned to the user role. See Choosing Service Options[21][22] and Set up Security and Grant User Access[23][24].

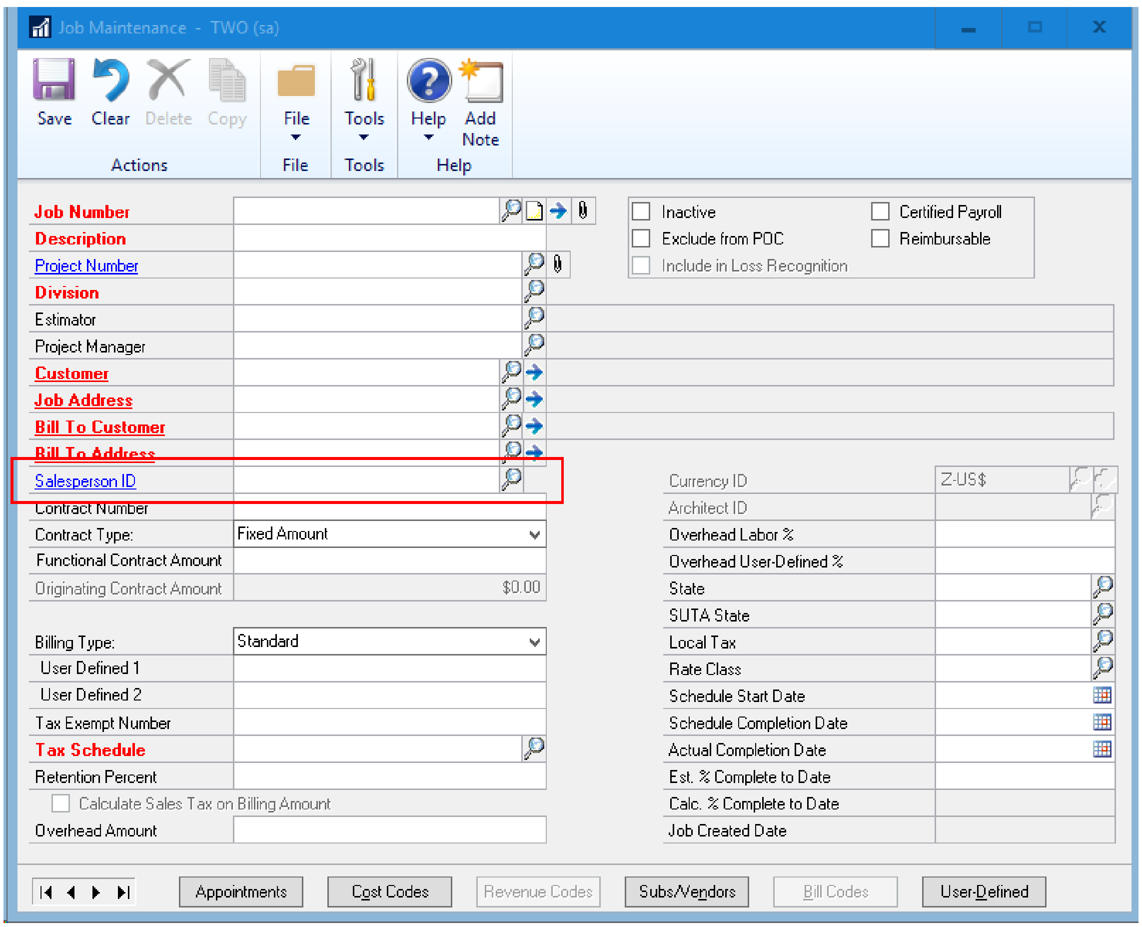
New Setup Option: A new Authorize specific users to add new calls for customers on hold setup option. This option is available when the Use Stop-and-Go Lights "If Red" options of No Warning or Display Warning are marked. If the Disable New Call Button option is marked for Use Stop-and-Go Lights, the new "Authorize" option is disabled and no user can create a service call for a customer who is on hold.
New Security Task ID: A new ADMIN_WSSMS_OVERRIDE_STOP security task ID has been created that allows users with this security task ID assigned to their user role to create a new service call for customers on hold. This security task ID has been added to the WENNSOFT SMS POWERUSER role and can be added to any other user role. Security tasks are assigned to security roles in the Security Roles Setup window. (Microsoft Dynamics GP > Tools > Setup > System > Security Roles).
Messages:
With the Authorize option marked, Display Warning is marked, and the customer is on hold, when a user selects the New Call button, one of the following messages is displayed.

Users without the security task ID will receive a message they do not have the necessary security privileges to create a new call.
Users with the security task ID will receive a warning message indicating the customer is on hold but asks if they still want to create a service call and displays Yes/No buttons.

</td></tr>
</table>

21 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104826918/Choosing+Service+Options
22 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104826918/Choosing+Service+Options
23 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104825122/Set+up+Security+and+Grant+User+Access
24 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104825122/Set+up+Security+and+Grant+User+Access

Job Cost

Case #	Description
JC-559	You can now add a salesperson at the job level. The Salesperson field has been added to the Job Maintenance window. When added at the job level, this overrides the salesperson added at the customer level. The Salesperson field has also been added to the Job History window. If the salesperson field is left blank at the job level in the Job Maintenance window, the salesperson for a new job invoice defaults to the one listed under the Bill To Customer. (This is current functionality.) This field does not look at the Service Call Percentage Applied to Gross Profit field in the Service Management alternate Salesperson Maintenance window. **Click here to view screenshot.** 

Case #	Description
JC-564	Users can no longer void a PM transaction associated with a closed job or a closed service call because this can cause the WIP to be off balance. A message now displays when the user attempts to void the transaction: "This transaction is associated with a closed job (or closed service call) and cannot be voided." See Entering Payables Transactions in Job Cost[25][26].
JC-565	Users can no longer void a PM transaction on a closed service call or job, a service call with saved invoices, and/or invoiced on Cost Plus jobs.

25 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104801531/Entering+Payables+Transactions+in+Job+Cost
26 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104801531/Entering+Payables+Transactions+in+Job+Cost

Case #	Description

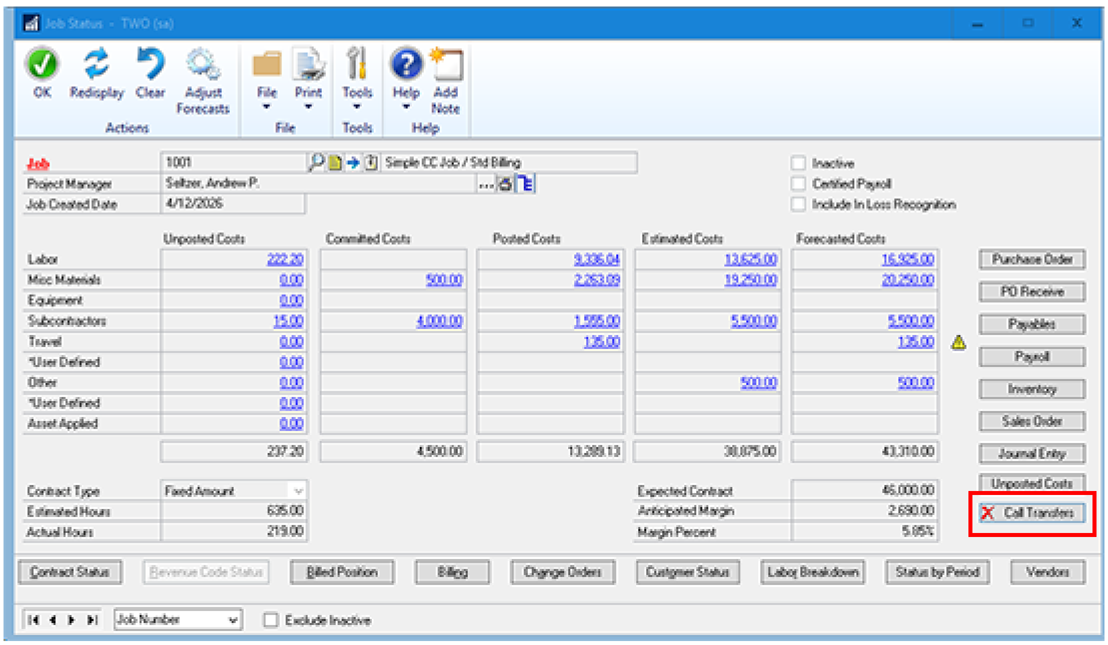
JC-576

A new Service Call Transfers window accessed from the Job Status window provides visibility to all service calls transferred or scheduled to be transferred. (Inquiry > Job Cost > Job Status)

From the Job Status window, you can quickly see if you have service call costs that have or have not been transferred depending on an icon displayed on the Call Transfer button. If no icon is displayed, the job number hasn't been entered on a service call on the Service Call window.

- A red X on the Transfer Call button indicates there is at least one service call associated with the job that has not been transferred.
- A green checkmark on the Transfer Call button indicates all service calls associated with the job have been transferred.

Click here to view screenshot.



Use the Service Call Transfers window to view the cost and billing transfers from service calls that are pending (not transferred) or have been transferred.

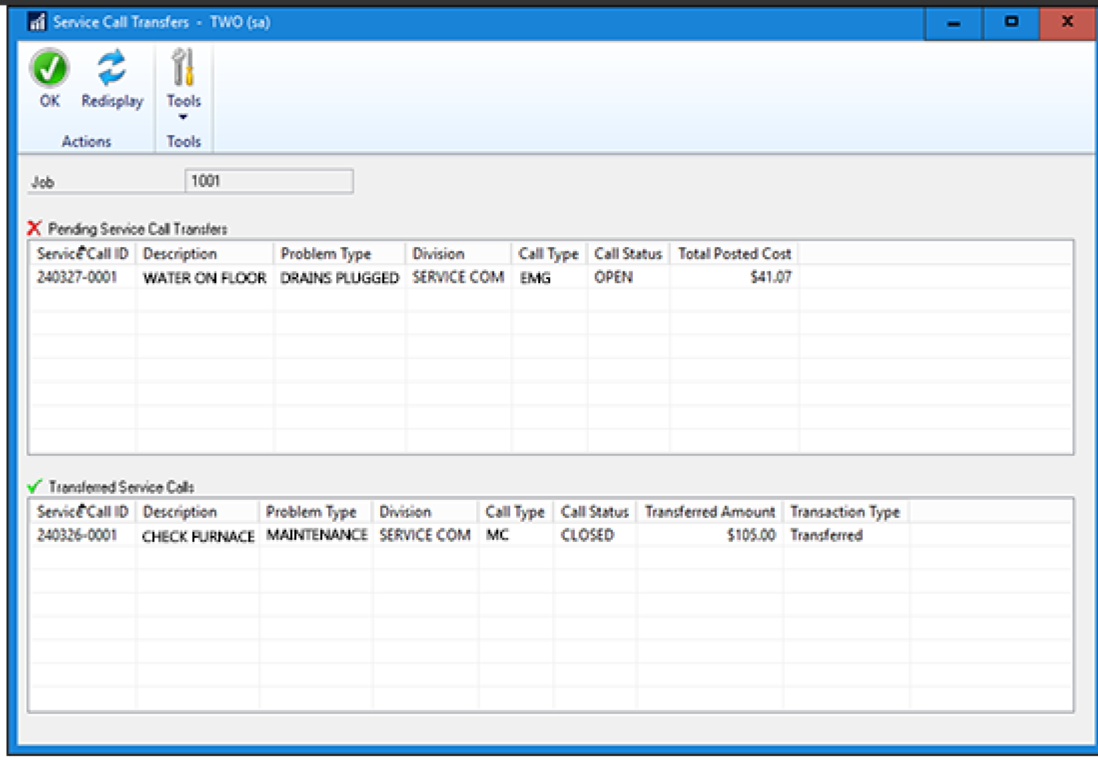
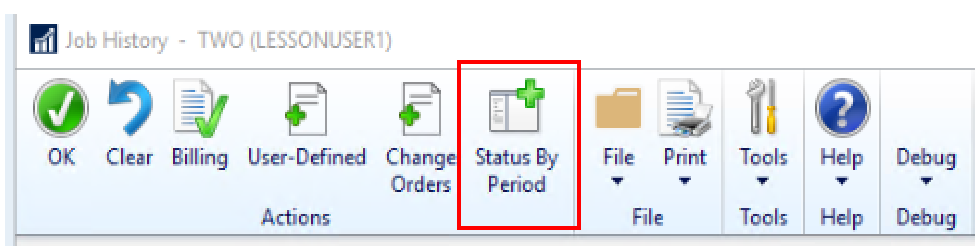
Using context menus accessed by right-clicking on a service call:

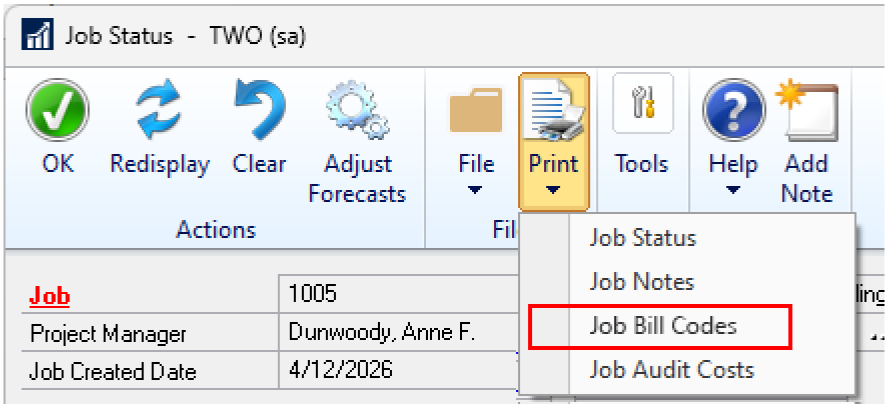
- In the Pending Service Call Transfers section, you can view the service call, call status, unposted costs, and initiate the transfer.
- In the Transferred Service Calls section, you can view the service call and invoice inquiry windows.

For more information, see Viewing Service Call Transfers[27][28].

Click here to view screenshot.

27 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/196378634/Viewing+Service+Call+Transfers
28 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/196378634/Viewing+Service+Call+Transfers

Case #	Description
	 **Note** We've removed the Transferred From Service Call icon that was to the right of the Job field that opened a similar window (Transferred From Service Calls) that only showed the transferred service calls.
JC-598	You can now view the Job History Status by Period view from the Job History window. We've added a Status By Period button that displays in the ribbon. In the Job History Status by Period window, you can view the status of a job by fiscal period for historical (closed) jobs. You can view job status for posted costs and forecasted costs. Open and closed periods are included. **Click here to view screenshot.** 

Case #	Description
JC-599	Users can now print the Job Bill Codes report from the Job Status window. The Job Bill Code report option is available if the job displayed in the window is a bill code type job. See Viewing Job Status Information[29][30]. **Click here to view screenshot.** 

29 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104802199/Viewing+Job+Status+Information
30 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104802199/Viewing+Job+Status+Information

TimeTrack

Case #	Description
TT-252	The TimeTrack Time Card Entry window has been updated to add zoom capabilities to the following fields: • Employee ID • Job Number • Cost Code Number • Pay Code • Shift Code **Click here to view screenshot.**