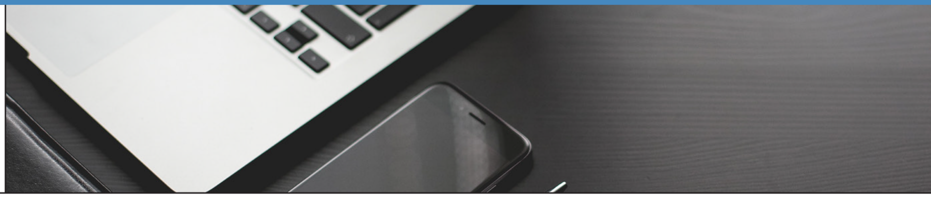


What's New in Signature 2024

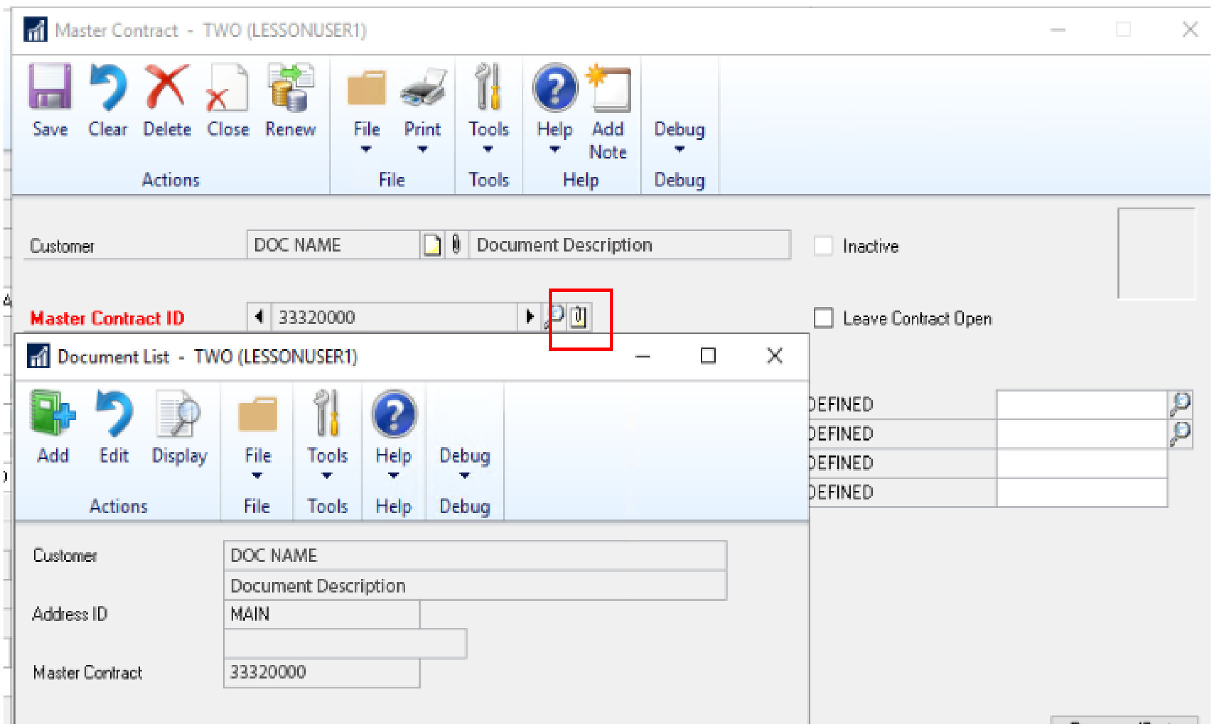
Release Version: 2024 (18.7.9g923)
Release Date: November 2024

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.
SMS-2354	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)[1]. • 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.
SMS-2376	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
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[2]. Contact WennSoft Sales for pricing information. For information about Azure Cloud storage, see Introduction to Azure Storage[3].

1 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/553648147/Designating+the+Default+Document+Storage+Location+Optional
2 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/510132229/Setting+Up+Azure+Cloud+Storage
3 https://learn.microsoft.com/en-us/azure/storage/common/storage-introduction

Case #	Description
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[4].
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.** 

4 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

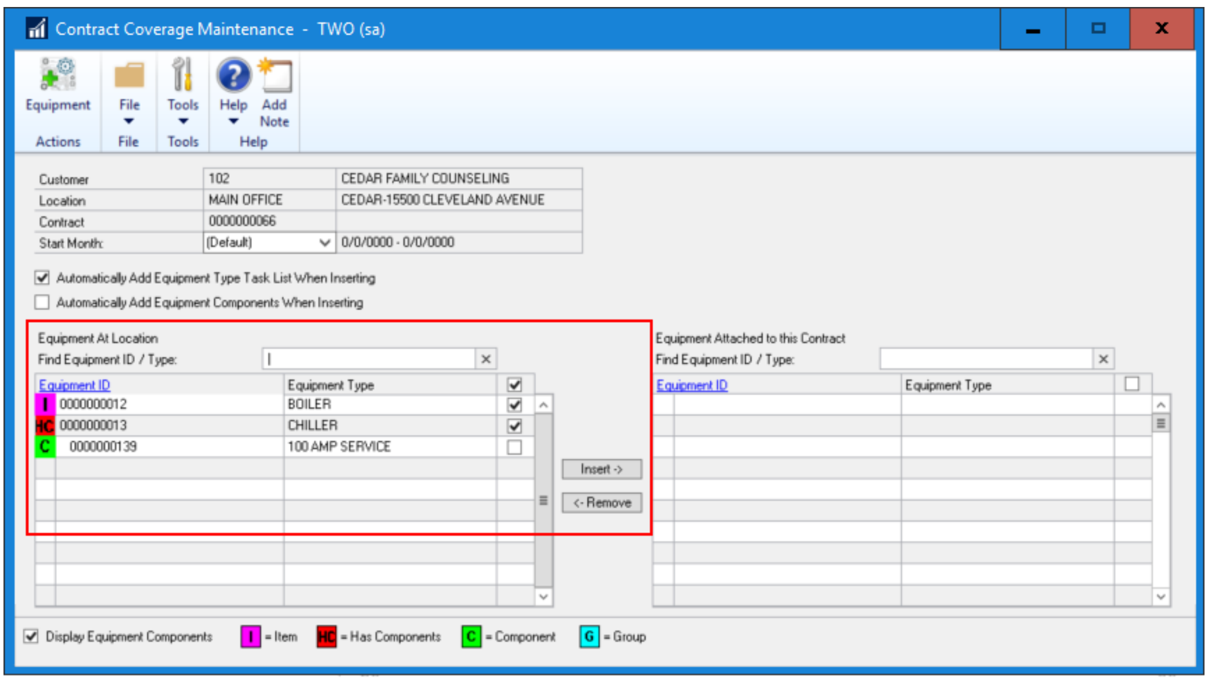
Page: 1
User ID: sa

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

Case #	Description
SMS-2444, SMS-2624	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[5]. **Click here to view screenshot.** 
SMS-2454	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.

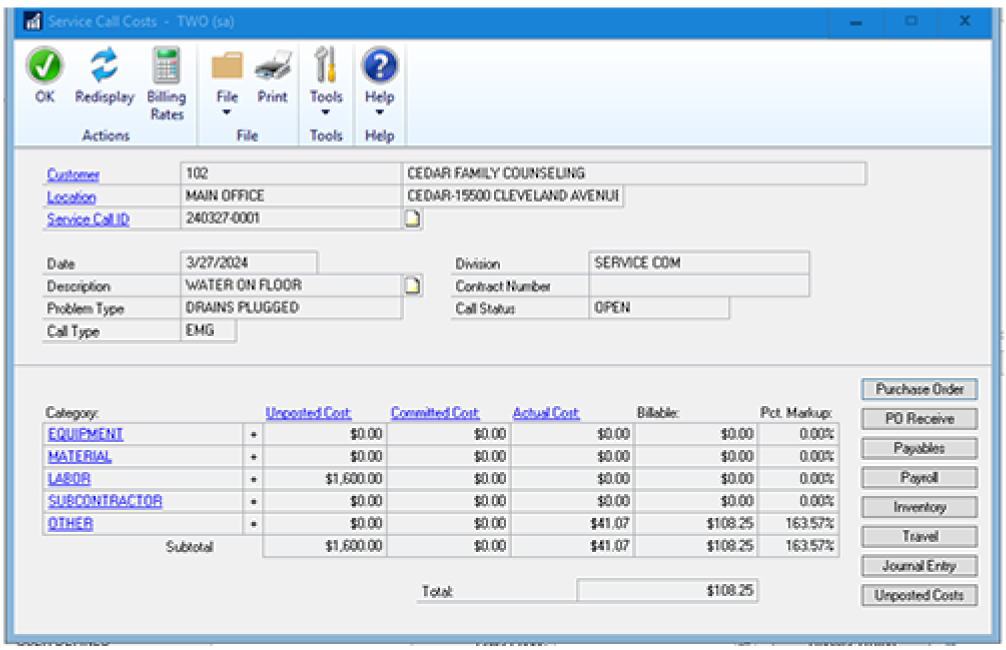
5 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104829861/Using+the+Contract+Coverage+Window

<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 Using the Service Call Costs Window[6].

Access the Service Call Costs window from the:

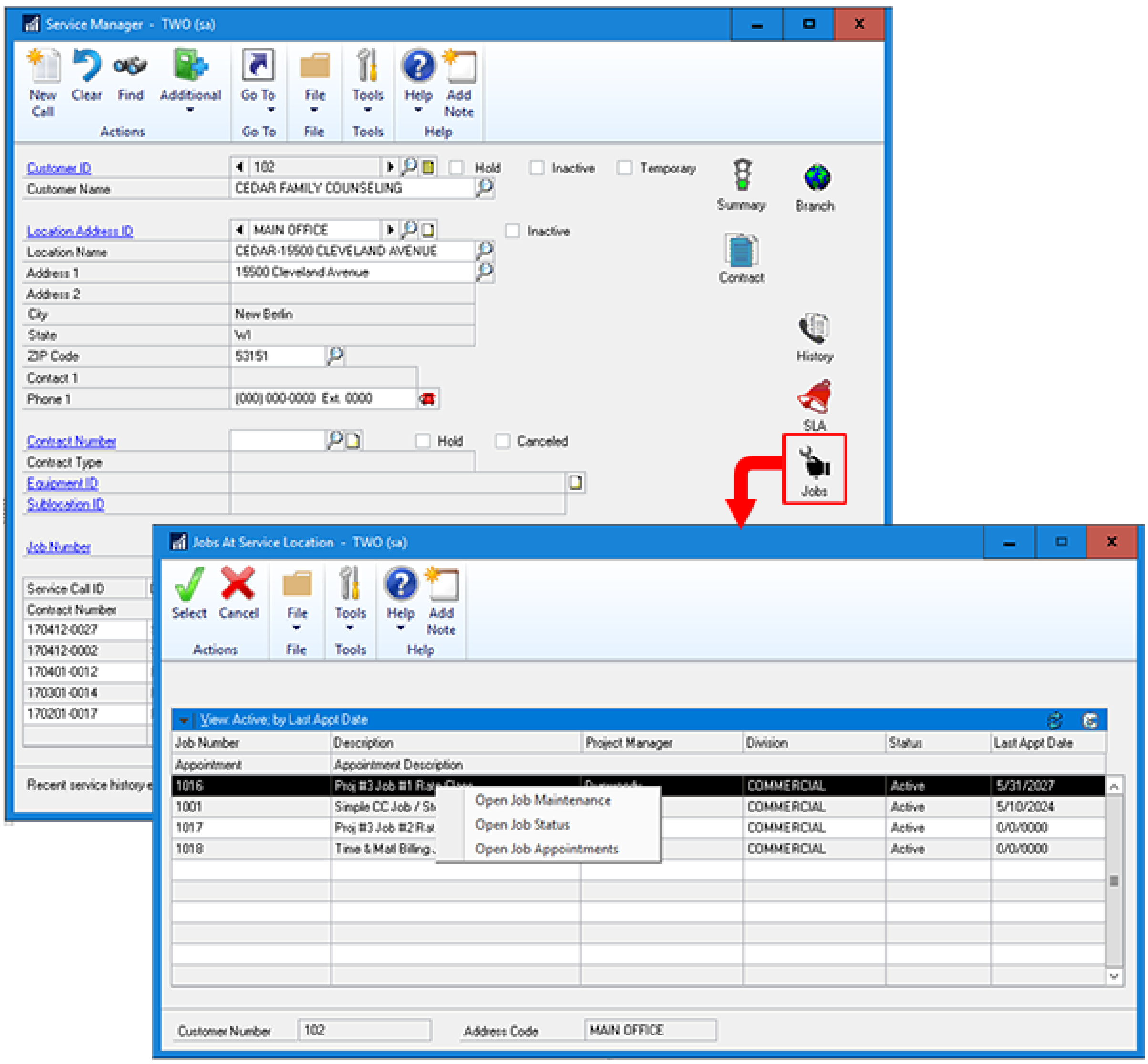
Service Call window: Select the Call Costs button in the ribbon.
Service Manager window:

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>

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

Case #	Description
SMS-2553	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[7]. **Click here to view screenshot.** 

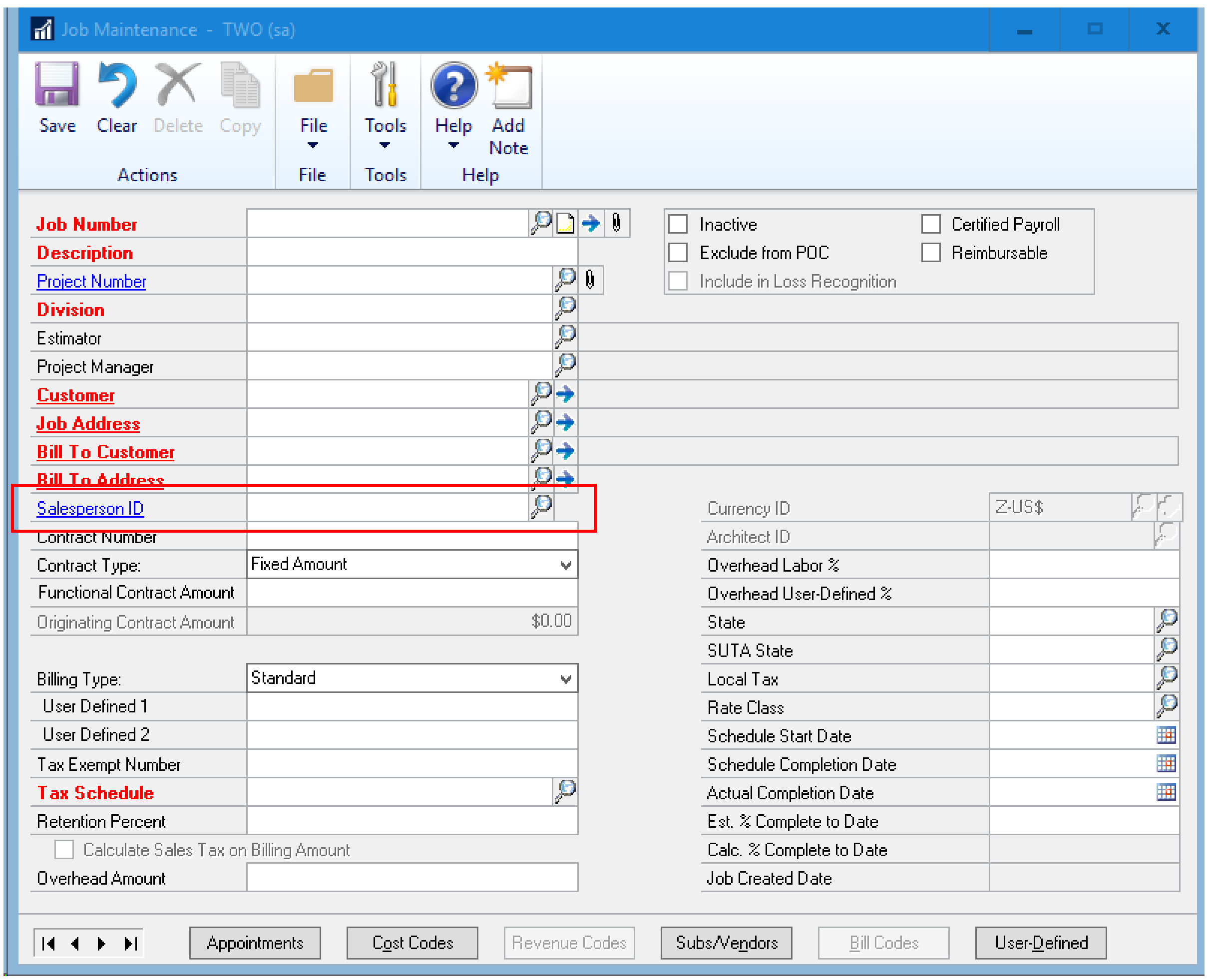
7 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/248774660/Viewing+Jobs+Associated+With+the+Service+Location

Case #	Description

SMS-2619	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[8] and Set up Security and Grant User Access[9].
	
	• **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.

8 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104826918/Choosing+Service+Options
9 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[10].
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.

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

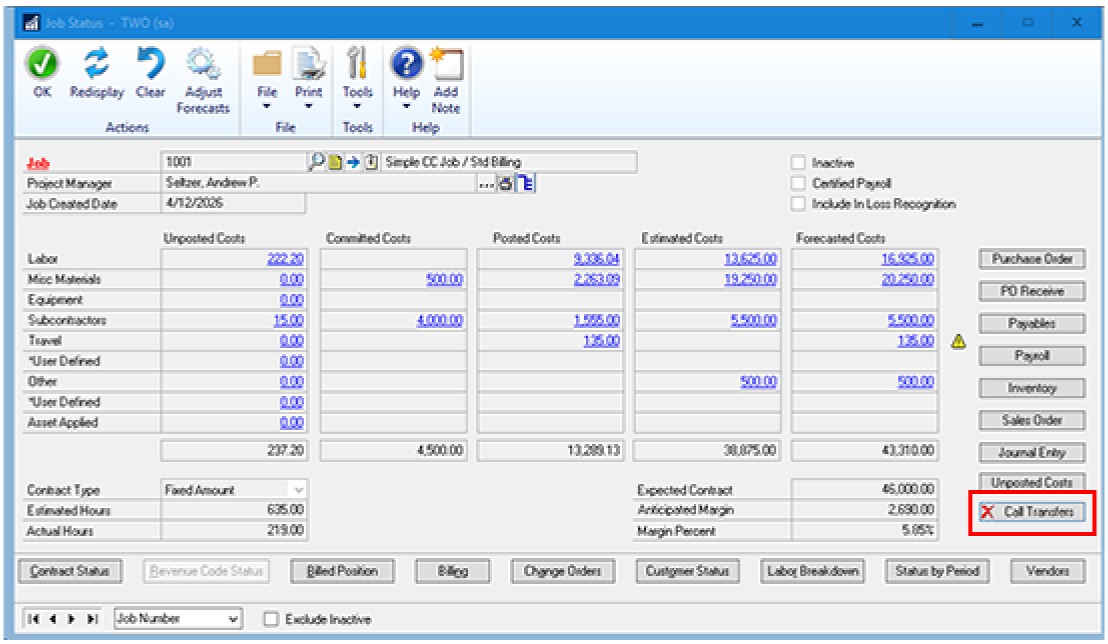
<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>JC-576</td><td>

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.

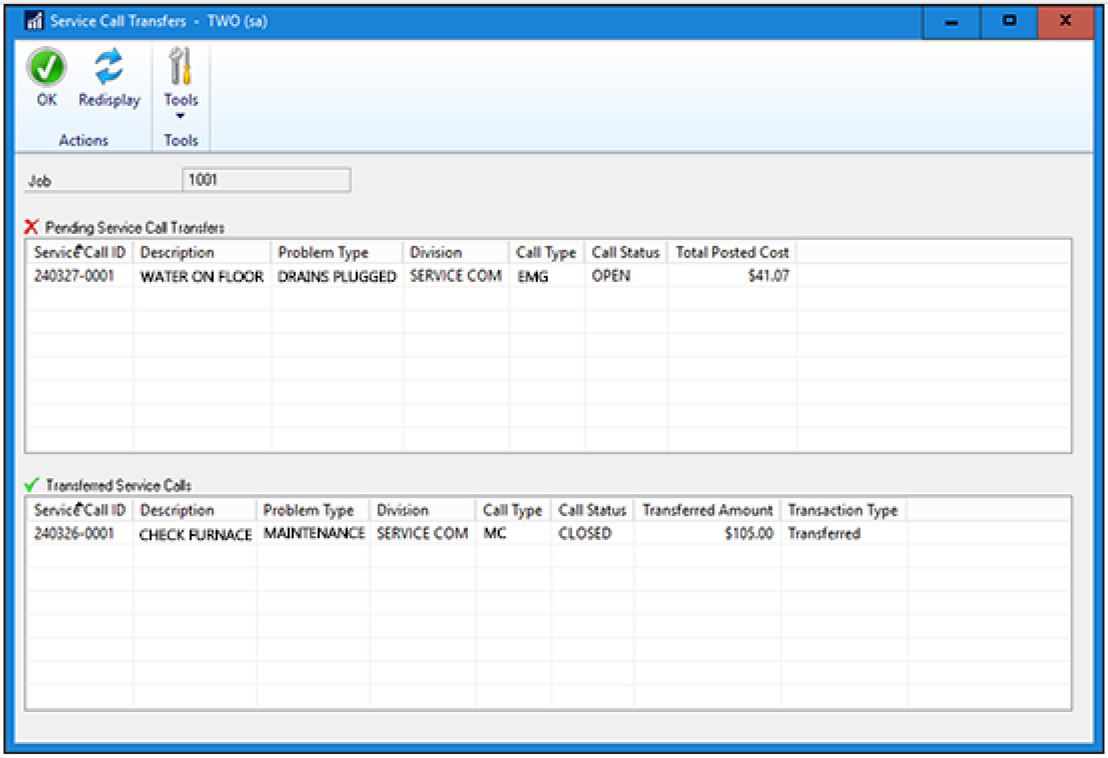
For more information, see Viewing Service Call Transfers[11].

Click here to view screenshot.

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

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

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td></td><td>



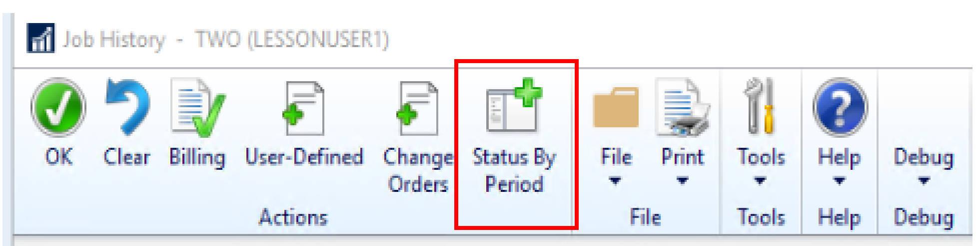
Note

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.

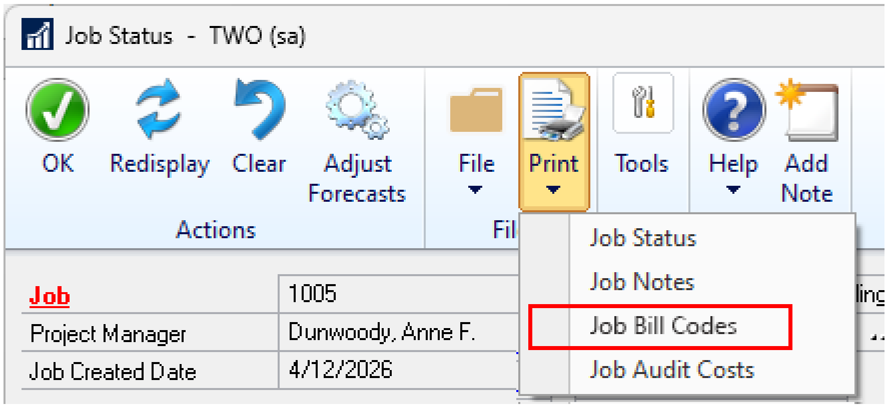
</td></tr>
<tr><td>JC-598</td><td>

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.



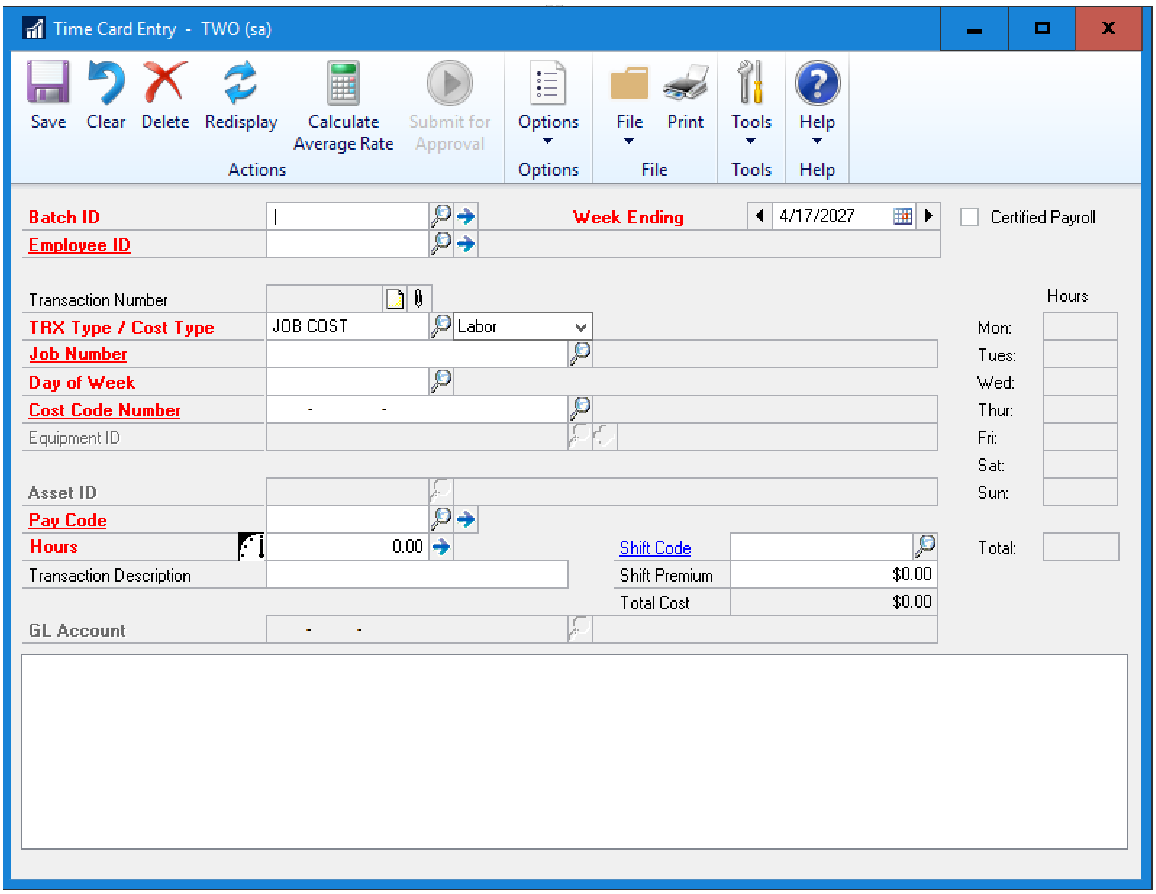
</td></tr>
</table>

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[12]. **Click here to view screenshot.** 

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

TimeTrack

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>TT-252</td><td>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.

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