



## 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:

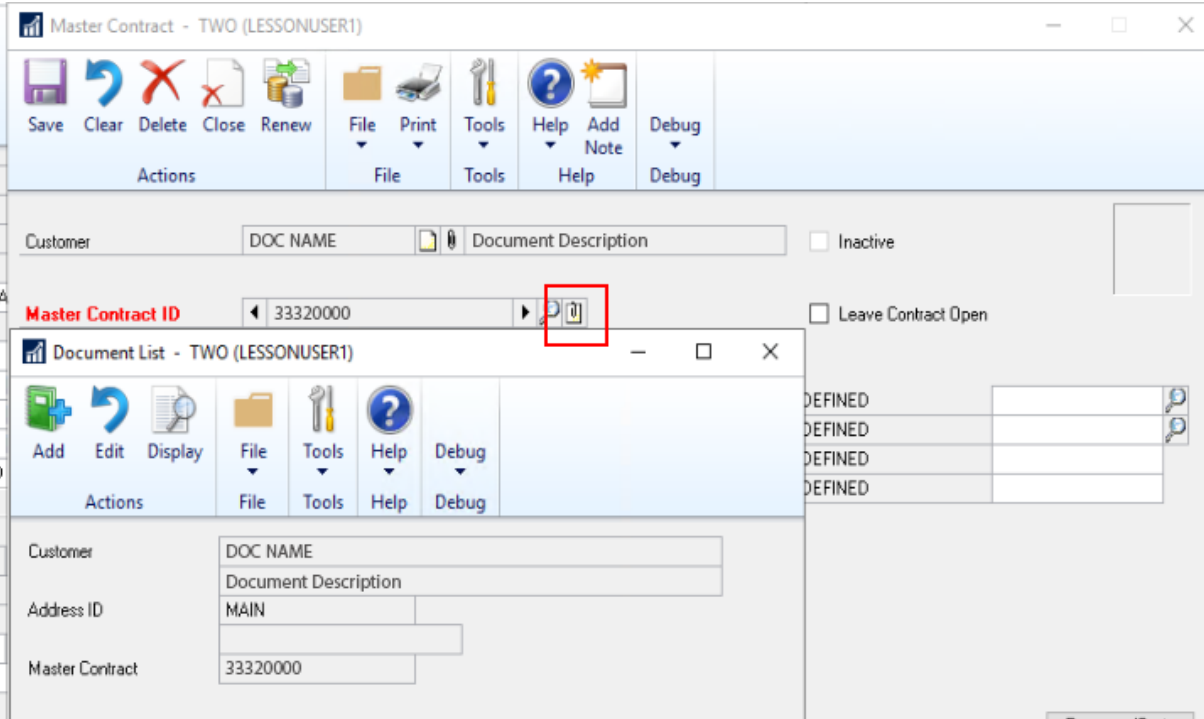
### Service Management

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	<p>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 &gt; Module Setup &gt; Document Storage Setup) and Job Cost settings (Job Cost &gt; Job Cost Settings &gt; Document Storage Setup). See <a href="#">Designating the Default Document Storage Location (Optional)</a><sup>1</sup>.</p> <ul style="list-style-type: none"><li>• 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.</li><li>• When the default option is set to Cloud Storage, the storage location cannot be changed in the Document Maintenance window.</li></ul>
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	<p>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 <a href="#">Setting Up Azure Cloud Storage</a><sup>2</sup>.</p> <p>Contact WennSoft Sales for pricing information. For information about Azure Cloud storage, see <a href="#">Introduction to Azure Storage</a><sup>3</sup>.</p>

<sup>1</sup> <https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/553648147/Designating+the+Default+Document+Storage+Location+Optional>

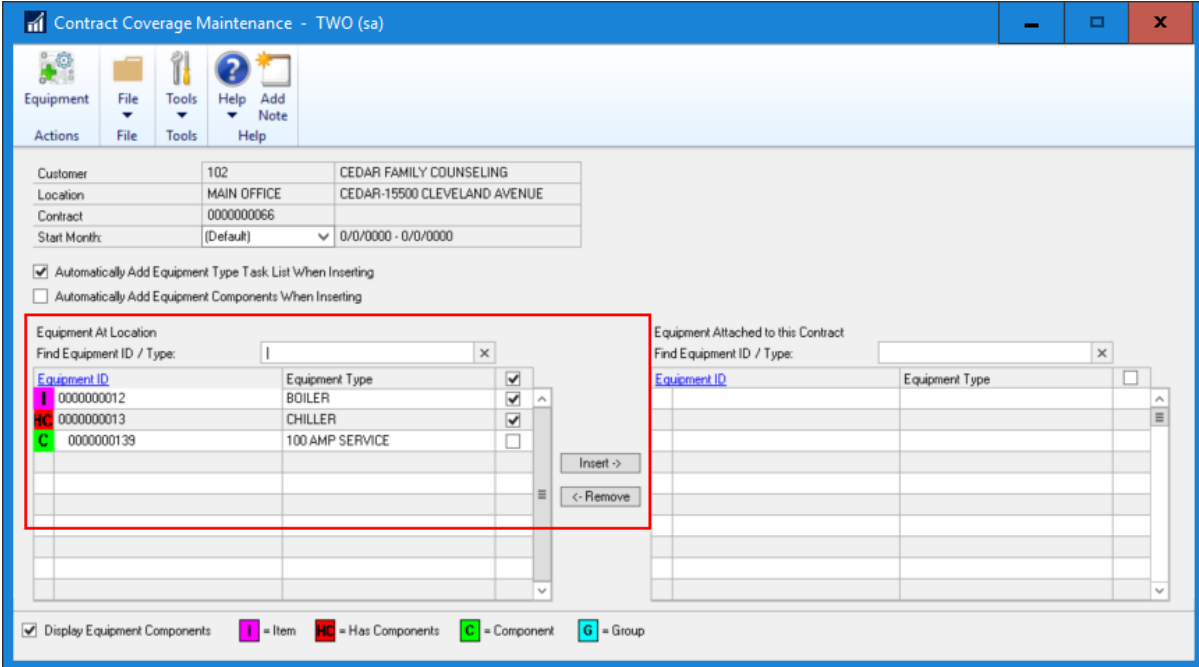
<sup>2</sup> <https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/510132229/Setting+Up+Azure+Cloud+Storage>

<sup>3</sup> <https://learn.microsoft.com/en-us/azure/storage/common/storage-introduction>

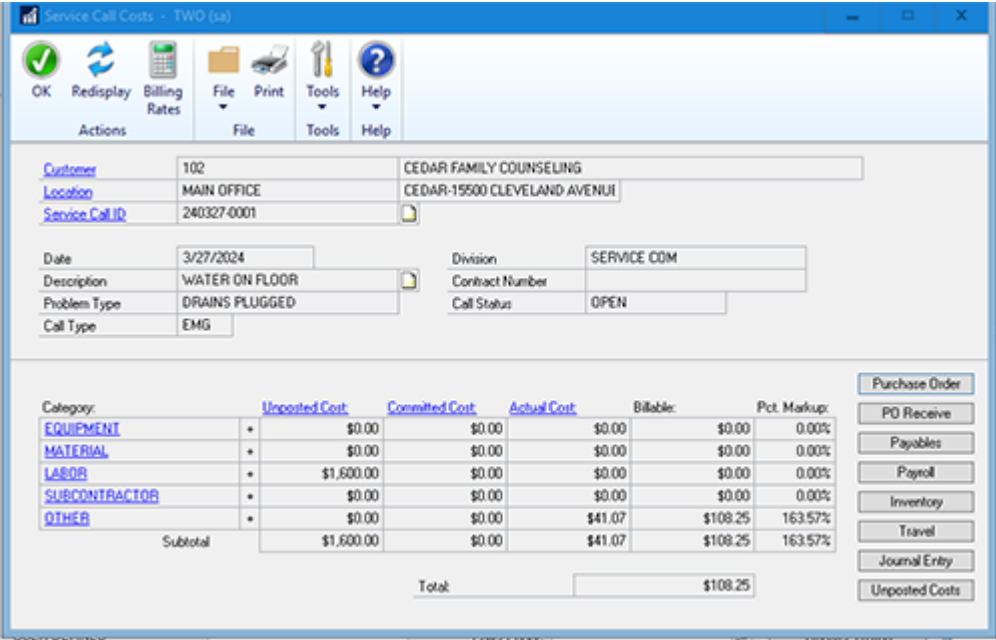
Case #	Description
SMS-2415	<p>Users can no longer void a PM transaction associated with a closed service call because this can cause the WIP to be off balance. A message now displays when the user attempts to void the transaction: "This transaction cannot be voided. (For example: On closed service calls, on service calls with saved invoices, the jobs are closed, and/or invoiced on Cost Plus jobs." See <a href="#">Entering Payables Transactions in Service Management</a><sup>4</sup>.</p>
SMS-2427	<p>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.</p> <p><b>Click here to view screenshot.</b></p>  <p>The screenshot shows two overlapping windows. The top window is titled 'Master Contract - TWO (LESSONUSER1)'. It has a ribbon with 'Actions', 'File', 'Tools', 'Help', and 'Debug' tabs. The 'Actions' tab includes icons for Save, Clear, Delete, Close, Renew, File, Print, Tools, Help, Add Note, and Debug. The 'File' tab includes File and Print. The 'Tools' tab includes Tools. The 'Help' tab includes Help. The 'Debug' tab includes Debug. Below the ribbon, there are fields for Customer, DOC NAME, and Document Description. A checkbox for 'Inactive' is present. The 'Master Contract ID' field contains '33320000' and has a paperclip icon to its right, which is highlighted with a red box. Below this is a checkbox for 'Leave Contract Open'. The bottom window is titled 'Document List - TWO (LESSONUSER1)'. It has a ribbon with 'Actions', 'File', 'Tools', 'Help', and 'Debug' tabs. The 'Actions' tab includes icons for Add, Edit, Display, File, Tools, Help, and Debug. The 'File' tab includes File. The 'Tools' tab includes Tools. The 'Help' tab includes Help. The 'Debug' tab includes Debug. Below the ribbon, there are fields for Customer, DOC NAME, Document Description, Address ID (with value 'MAIN'), and Master Contract (with value '33320000').</p>

<sup>4</sup> <https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104830996/Entering+Payables+Transactions+in+Service+Management>

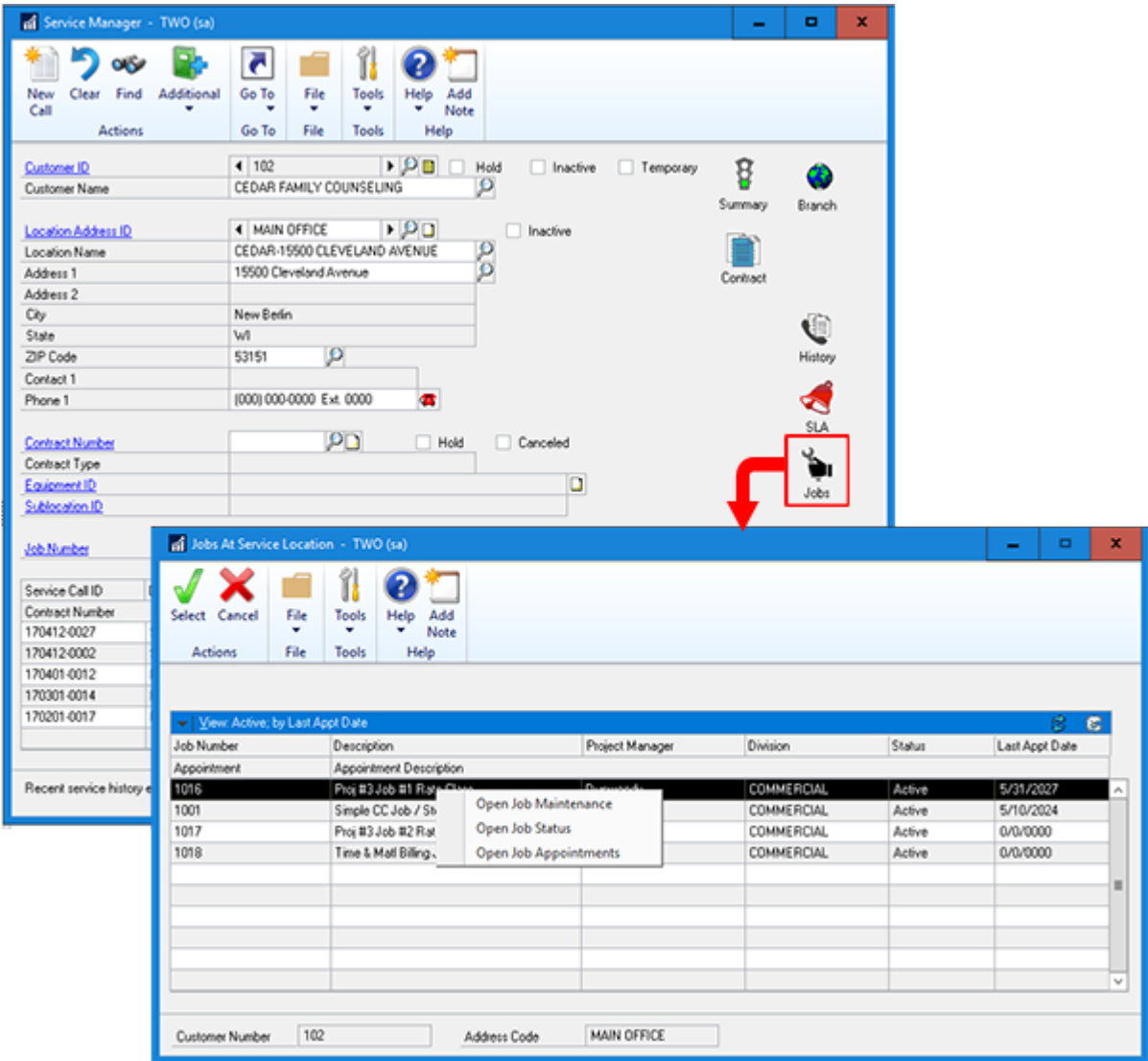
Case #	Description
SMS-2440	<p>We've updated the Maintenance Contract Service Call report to be more space-efficient. The report now displays and prints in landscape mode.</p> <p><b>Click here to view screenshot.</b></p> <pre> System:      2/5/2024  4:27:29 PM User Date:  2/5/2024  Page:      1 User 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                     </pre>

Case #	Description
<p>SMS-2444, SMS-2624</p>	<p>The Contract Coverage Maintenance window has been updated with the following:</p> <ul style="list-style-type: none"> <li>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.</li> <li>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.</li> <li>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.</li> </ul> <p>The Contract Coverage Maintenance window is accessed by going to Contract Maintenance &gt; Coverage &gt; Equipment. See <a href="#">Using the Contract Coverage Window</a><sup>5</sup>.</p> <p><b>Click here to view screenshot.</b></p>  <p>The screenshot shows the 'Contract Coverage Maintenance - TWO (sa)' window. It features a menu bar with 'Equipment', 'File', 'Tools', 'Help', and 'Add Note'. Below the menu is a header section with fields for Customer (102, CEDAR FAMILY COUNSELING), Location (MAIN OFFICE, CEDAR-15500 CLEVELAND AVENUE), Contract (000000066), and Start Month (0/0/0000 - 0/0/0000). There are two checkboxes: 'Automatically Add Equipment Type Task List When Inserting' (checked) and 'Automatically Add Equipment Components When Inserting' (unchecked). The main area contains two tables: 'Equipment At Location' and 'Equipment Attached to this Contract'. The 'Equipment At Location' table has columns for 'Equipment ID', 'Equipment Type', and a checkbox. It lists three items: '000000012 BOILER' (checked), '000000013 CHILLER' (checked), and '000000139 100 AMP SERVICE' (unchecked). A red box highlights the search field and the first three rows of this table. The 'Equipment Attached to this Contract' table is currently empty. At the bottom, there is a legend for 'Display Equipment Components' with color-coded icons: Item (I), Has Components (HC), Component (C), and Group (G).</p>
<p>SMS-2454</p>	<p>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.</p>

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

Case #	Description
SMS-2497	<p>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 <a href="#">Using the Service Call Costs Window</a><sup>6</sup>.</p> <p>Access the Service Call Costs window from the:</p> <ul style="list-style-type: none"> <li>• <b>Service Call window:</b> Select the <i>Call Costs</i> button in the ribbon.</li> <li>• <b>Service Manager window:</b> <ul style="list-style-type: none"> <li>• Select the customer and location. Right-click on a service call in the scrolling window and select <i>View Service Call Costs</i>.</li> <li>• Select the customer and location. Select the <i>History</i> icon. In the Service Call Lookup by Customer window, right-click on a service call in the scrolling window, and select <i>View Service Call Costs</i>.</li> </ul> </li> </ul> <p><b>Click here to view screenshot.</b></p> 

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

Case #	Description																														
SMS-2553	<p>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 <a href="https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/248774660/Viewing+Jobs+Associated+With+the+Service+Location">Viewing Jobs Associated With the Service Location</a><sup>7</sup>.</p> <p><b>Click here to view screenshot.</b></p>  <p>The screenshot displays two overlapping windows from the Signature software. The top window, titled 'Service Manager - TWO (sa)', shows a form for customer and location information. The customer ID is 102, and the location is 'MAIN OFFICE' at 'CEDAR-15500 CLEVELAND AVENUE'. A red arrow points to a 'Jobs' icon in the right-hand sidebar of this window. The bottom window, titled 'Jobs At Service Location - TWO (sa)', shows a table of jobs. A context menu is open over the first row of the table, offering options like 'Open Job Maintenance', 'Open Job Status', and 'Open Job Appointments'.</p> <table border="1" data-bbox="454 1060 1485 1619"> <thead> <tr> <th>Job Number</th> <th>Description</th> <th>Project Manager</th> <th>Division</th> <th>Status</th> <th>Last Appt Date</th> </tr> </thead> <tbody> <tr> <td>1016</td> <td>Proj #3 Job #1 Flat...</td> <td></td> <td>COMMERCIAL</td> <td>Active</td> <td>5/31/2027</td> </tr> <tr> <td>1001</td> <td>Simple CC Job / St...</td> <td></td> <td>COMMERCIAL</td> <td>Active</td> <td>5/10/2024</td> </tr> <tr> <td>1017</td> <td>Proj #3 Job #2 Flat...</td> <td></td> <td>COMMERCIAL</td> <td>Active</td> <td>0/0/0000</td> </tr> <tr> <td>1018</td> <td>Time &amp; Matl Billing...</td> <td></td> <td>COMMERCIAL</td> <td>Active</td> <td>0/0/0000</td> </tr> </tbody> </table>	Job Number	Description	Project Manager	Division	Status	Last Appt Date	1016	Proj #3 Job #1 Flat...		COMMERCIAL	Active	5/31/2027	1001	Simple CC Job / St...		COMMERCIAL	Active	5/10/2024	1017	Proj #3 Job #2 Flat...		COMMERCIAL	Active	0/0/0000	1018	Time & Matl Billing...		COMMERCIAL	Active	0/0/0000
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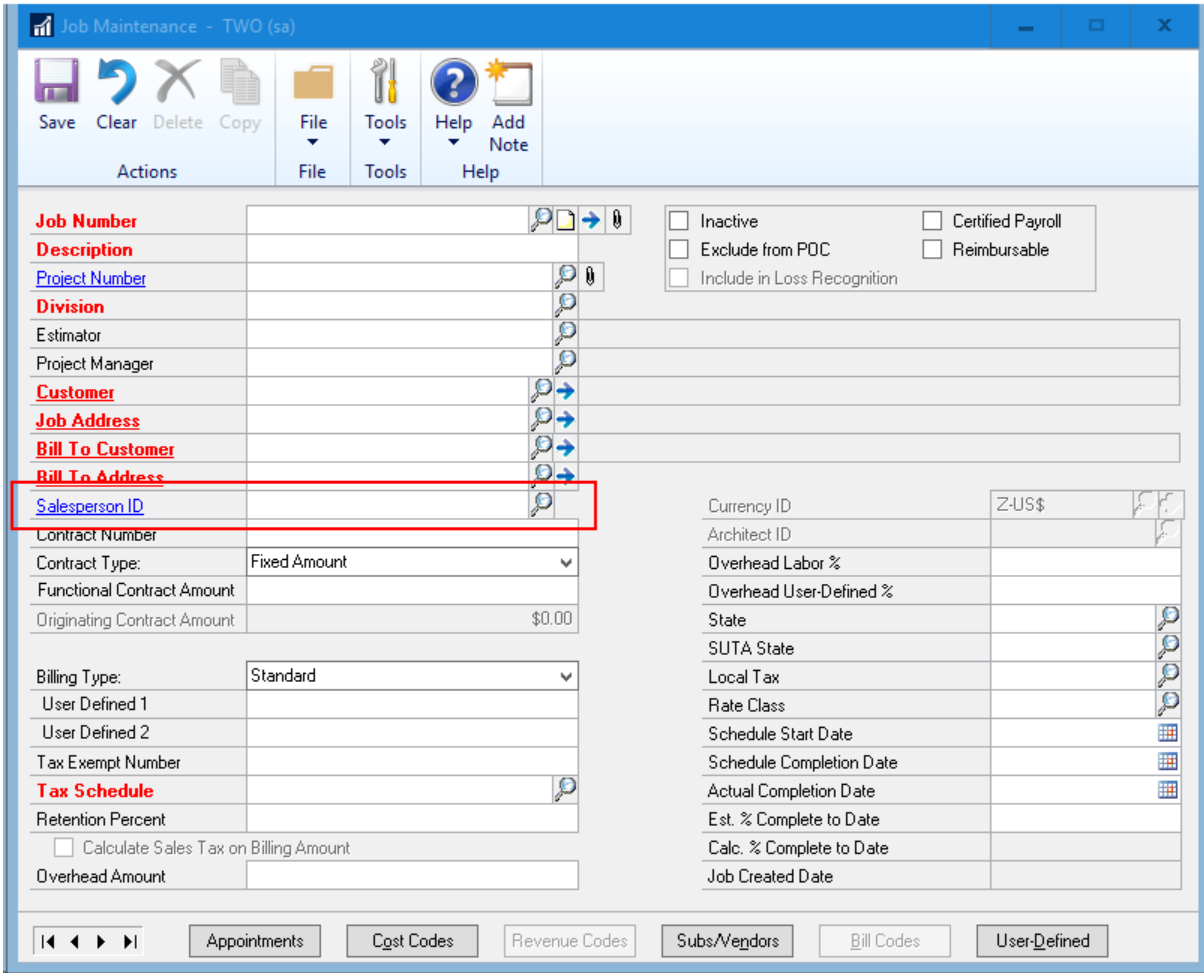
<sup>7</sup> <https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/248774660/Viewing+Jobs+Associated+With+the+Service+Location>

Case #	Description
SMS-2619	<p>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 <b>Authorize specific users to add new calls for customers on hold</b> 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 <a href="#">Choosing Service Options</a><sup>8</sup> and <a href="#">Set up Security and Grant User Access</a><sup>9</sup>.</p> <ul style="list-style-type: none"> <li>• <b>New Setup Option:</b> A new <b>Authorize specific users to add new calls for customers on hold</b> 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.</li> <li>• <b>New Security Task ID:</b> 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 &gt; Tools &gt; Setup &gt; System &gt; Security Roles).</li> <li>• <b>Messages:</b> 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. <ul style="list-style-type: none"> <li>• Users without the security task ID will receive a message they do not have the necessary security privileges to create a new call.</li> <li>• 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.</li> </ul> </li> </ul>

<sup>8</sup> <https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104826918/Choosing+Service+Options>

<sup>9</sup> <https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104825122/Set+up+Security+and+Grant+User+Access>

# Job Cost

Case #	Description
JC-559	<p>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.</p> <p>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.)</p> <div style="border: 1px solid yellow; padding: 5px; margin: 10px 0;"> <p> This field does not look at the Service Call Percentage Applied to Gross Profit field in the Service Management alternate Salesperson Maintenance window.</p> </div> <p><b>Click here to view screenshot.</b></p>  <p>The screenshot shows the 'Job Maintenance - TWO (sa)' window. The 'Salesperson ID' field is highlighted with a red box. The window includes a menu bar with 'Save', 'Clear', 'Delete', 'Copy', 'File', 'Tools', 'Help', and 'Add Note'. The main area contains various fields for job details, including 'Job Number', 'Description', 'Project Number', 'Division', 'Estimator', 'Project Manager', 'Customer', 'Job Address', 'Bill To Customer', 'Bill To Address', 'Salesperson ID', 'Contract Number', 'Contract Type', 'Functional Contract Amount', 'Originating Contract Amount', 'Billing Type', 'User Defined 1', 'User Defined 2', 'Tax Exempt Number', 'Tax Schedule', 'Retention Percent', 'Overhead Amount', 'Currency ID', 'Architect ID', 'Overhead Labor %', 'Overhead User-Defined %', 'State', 'SUTA State', 'Local Tax', 'Rate Class', 'Schedule Start Date', 'Schedule Completion Date', 'Actual Completion Date', 'Est. % Complete to Date', 'Calc. % Complete to Date', and 'Job Created Date'. At the bottom, there are buttons for 'Appointments', 'Cgst Codes', 'Revenue Codes', 'Subs/Vendors', 'Bill Codes', and 'User-Defined'.</p>



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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 <a href="#">Entering Payables Transactions in Job Cost</a> <sup>10</sup> .
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.

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

Case #	Description
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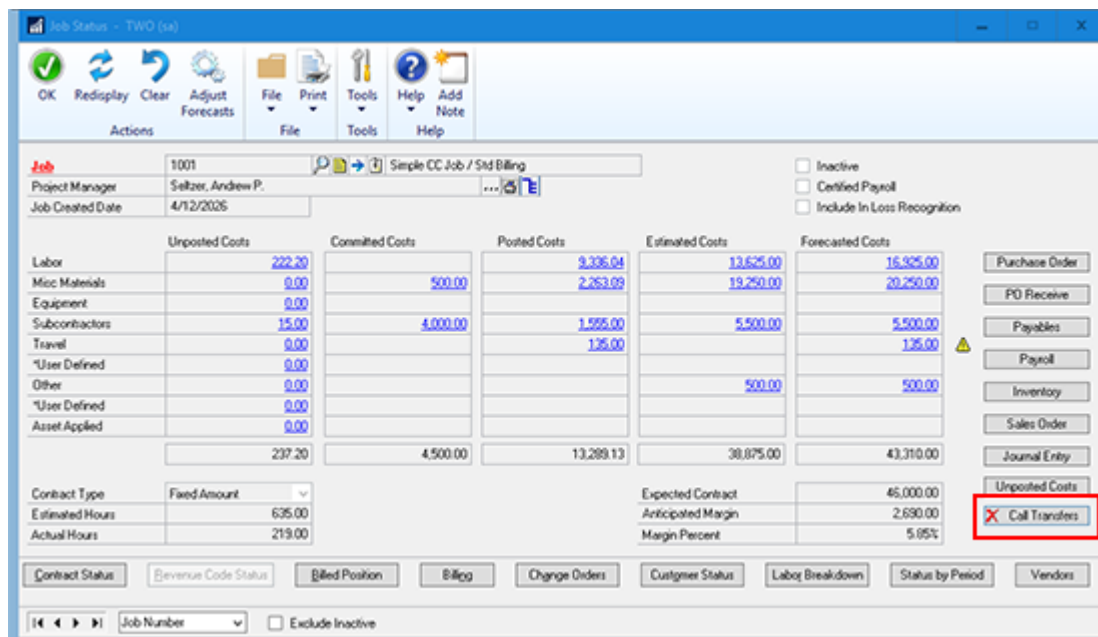
JC-576

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:

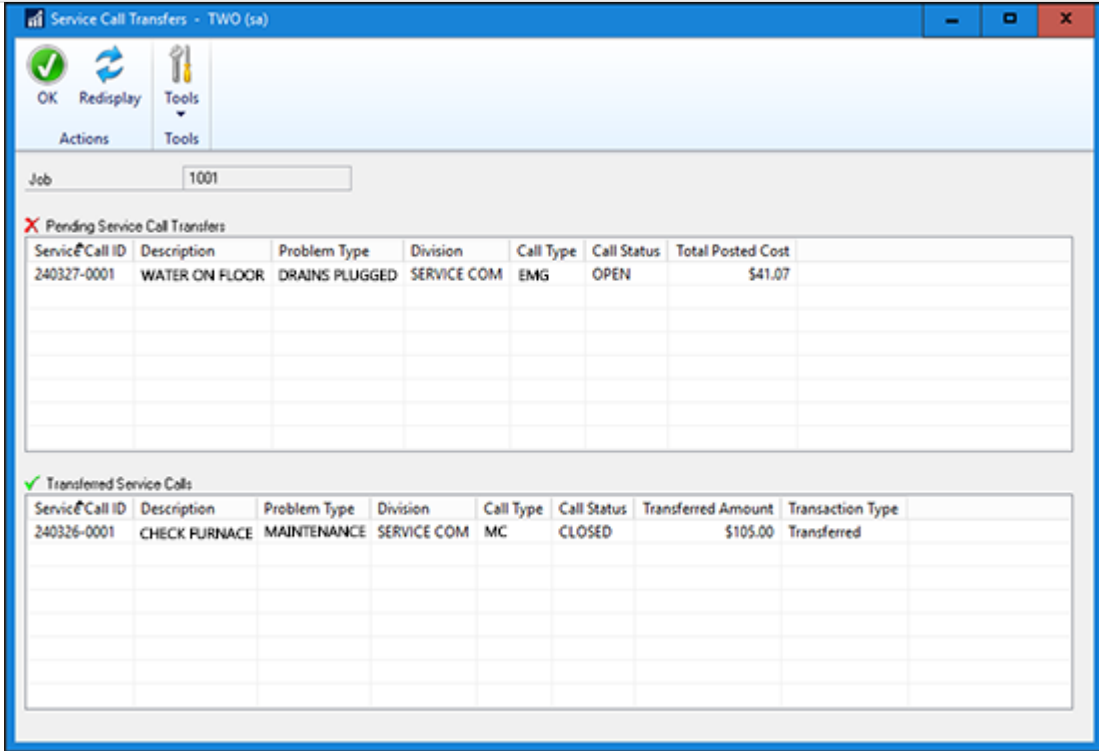
- In the Pending Service Call Transfers section, you can view the service call, call status, unposted costs, and initiate the transfer.
- In the Transferred Service Calls section, you can view the service call and invoice inquiry windows.

For more information, see [Viewing Service Call Transfers](#)<sup>11</sup>.

**Click here to view screenshot.**

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

**Case #**      **Description**

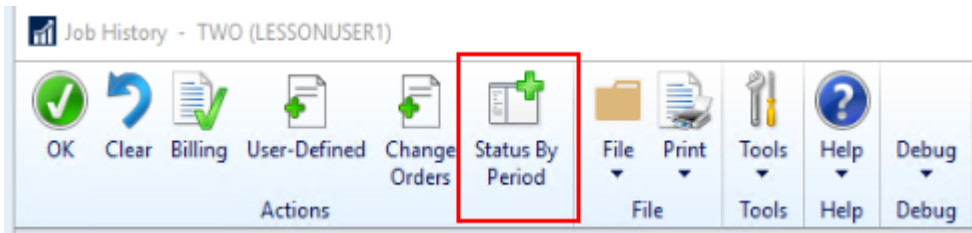


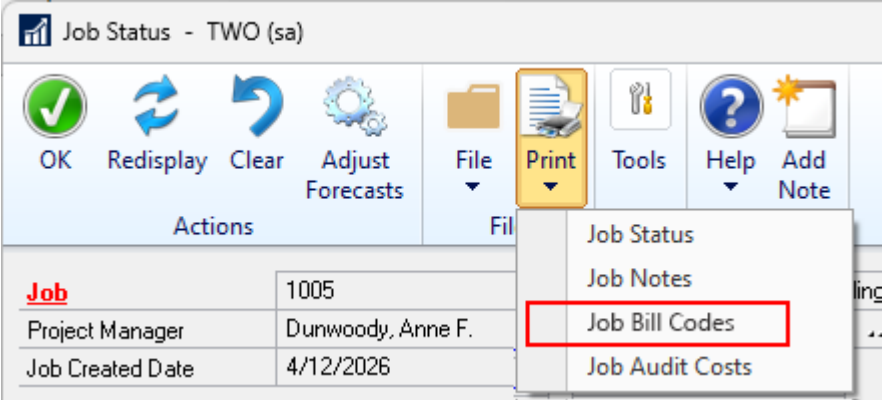
**Note**

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.

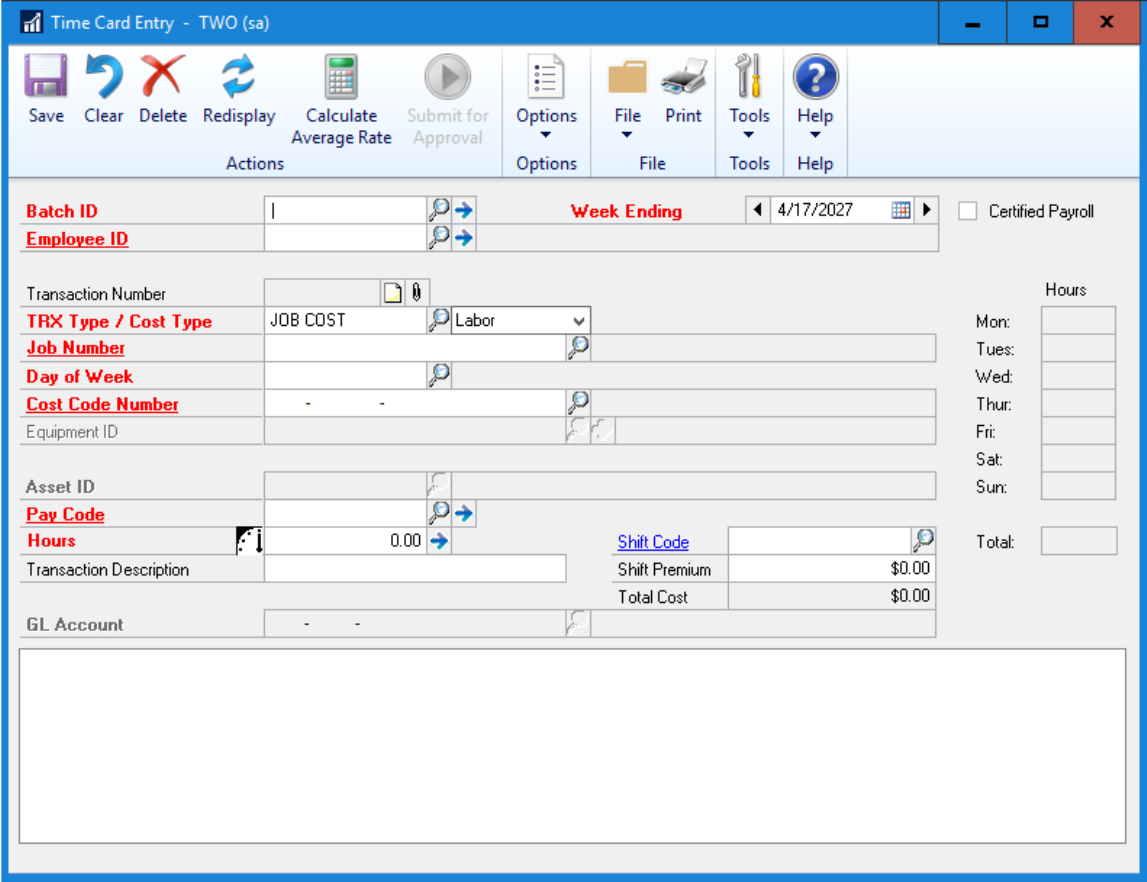
**Click here to view screenshot.**



Case #	Description						
JC-599	<p>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 <a href="#">Viewing Job Status Information</a><sup>12</sup>.</p> <p><b>Click here to view screenshot.</b></p>  <p>The screenshot shows a software window titled "Job Status - TWO (sa)". It features a toolbar with buttons for "OK", "Redisplay", "Clear", "Adjust Forecasts", "File", "Print", "Tools", "Help", and "Add Note". Below the toolbar is a table with the following data:</p> <table border="1" data-bbox="300 682 803 825"> <tr> <td><b>Job</b></td> <td>1005</td> </tr> <tr> <td>Project Manager</td> <td>Dunwoody, Anne F.</td> </tr> <tr> <td>Job Created Date</td> <td>4/12/2026</td> </tr> </table> <p>The "Print" button is open, showing a dropdown menu with the following options: "Job Status", "Job Notes", "Job Bill Codes" (highlighted with a red box), and "Job Audit Costs".</p>	<b>Job</b>	1005	Project Manager	Dunwoody, Anne F.	Job Created Date	4/12/2026
<b>Job</b>	1005						
Project Manager	Dunwoody, Anne F.						
Job Created Date	4/12/2026						

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

# TimeTrack

Case #	Description
TT-252	<p>The TimeTrack Time Card Entry window has been updated to add zoom capabilities to the following fields:</p> <ul style="list-style-type: none"> <li>• Employee ID</li> <li>• Job Number</li> <li>• Cost Code Number</li> <li>• Pay Code</li> <li>• Shift Code</li> </ul> <p><b>Click here to view screenshot.</b></p>  <p>The screenshot shows the 'Time Card Entry - TWO (sa)' application window. It features a toolbar with icons for Save, Clear, Delete, Redisplay, Calculate Average Rate, Submit for Approval, Options, File, Print, Tools, and Help. Below the toolbar, there are several input fields: Batch ID, Employee ID, Week Ending (4/17/2027), Certified Payroll checkbox, Transaction Number, TRX Type / Cost Type (JOB COST), Labor dropdown, Job Number, Day of Week, Cost Code Number, Equipment ID, Asset ID, Pay Code, Hours (0.00), Shift Code, Transaction Description, Shift Premium (\$0.00), Total Cost (\$0.00), and GL Account. On the right side, there is a section for 'Hours' with input boxes for Mon, Tues, Wed, Thur, Fri, Sat, Sun, and a Total field.</p>