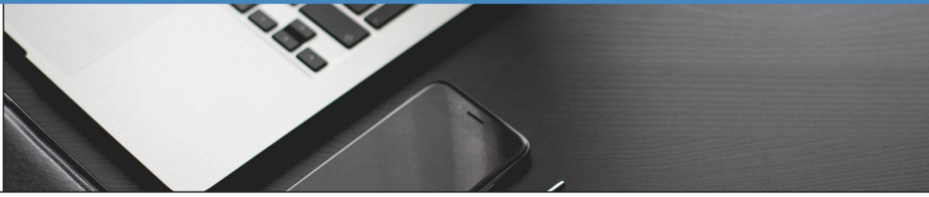


What's New in Schedule 2024 (7.0)

Release Version: 2024.78
Release Date: November 2024

View our recorded **What’s New in Schedule 2024**[1] presentation.

1 https://youtu.be/cGPE0Ki7uZg?si=ilubkVvXVO_5XlB-

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SCHED-544</td><td>
You can now view service level agreement (SLAs) alerts and related warning messages on the Schedule Board and the Unscheduled Appointments grid. For more information, see Setting Up Schedule Configuration[2].
We've added a section to the Schedule Configuration Settings window that lets you:

Designate one or more of the five SLA alert threshold levels to monitor.
Configure (in minutes) an automatic refresh interval for your SLA monitoring. When configured, this refresh interval will apply to both SLA info on the board and in a pop-up window that displays the count of each alert type.

The pop-up window is kept on the screen until you click the X to close the window.
Manually refresh the Schedule board to refresh SLA info. This works even if you don’t have an automatic refresh interval configured.

Customize the following options for the Caution, Warning, and Late alerts.

Minutes: The number of minutes before the SLA is displayed as an alert on the board. The Late alert does not have a Minutes option. Once the guaranteed time is not met, the appointment will be set to Late.
Color: The color associated with the SLA alert.

Schedule Board: The icons on the appointment bar and tooltip will display this color.
Unscheduled Appointments grid: The background color of the cell displays this color.

Icon: The icon name for the icon that displays for the alert. You can change the icon image by entering the icon name exactly as displayed on the Font Awesome website. Icon images and names can be found at https://fontawesome.com/v4/icons/.

Service levels are set up and assigned to a customer's location in Signature. SLAs automatically calculate response times for all five timestamps of a service call. When a service call is created, the response times are calculated. As the service call guaranteed time nears expiration, the user is visually alerted on the Schedule Board. Service level agreements are not used with MCC calls. For detailed information on setting up service levels, see Using Service Level Agreements (SLA)[3] in the Signature documentation.
If there is more than one appointment associated with the call, the first appointment to be changed to a linked status updates the Time Stamp window, except for the Complete status. If you link the Complete appointment status to a time stamp, the last appointment on the service call to be changed to Complete updates the time stamp.

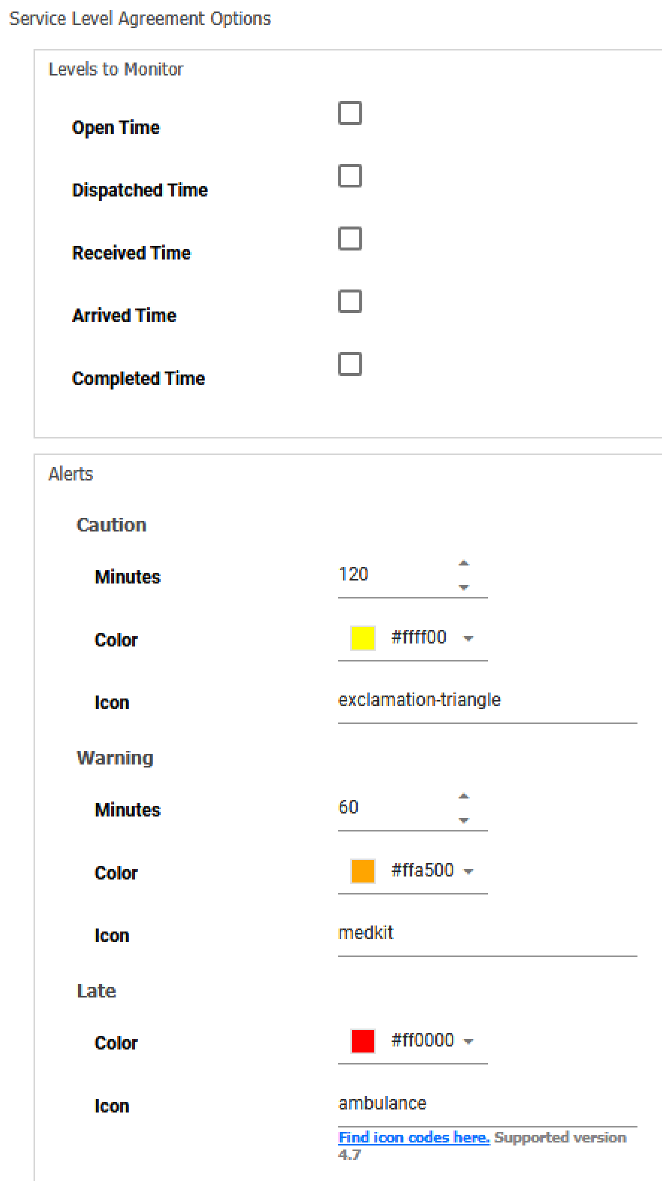
</td></tr>
</table>

2 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104841267/Setting+Up+Schedule+Configuration
3 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104830456/Using+Service+Level+Agreements+SLAs

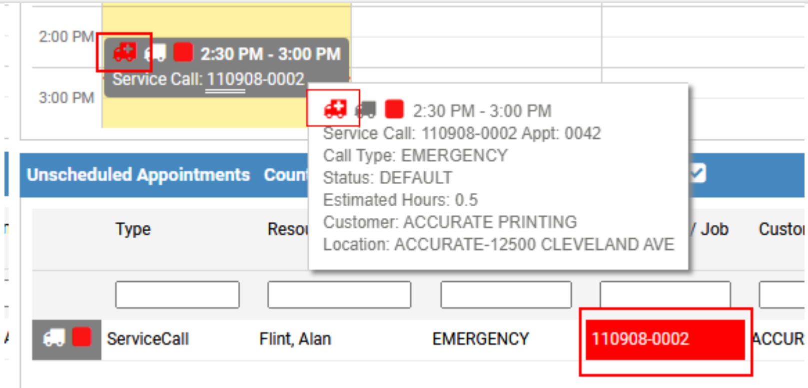
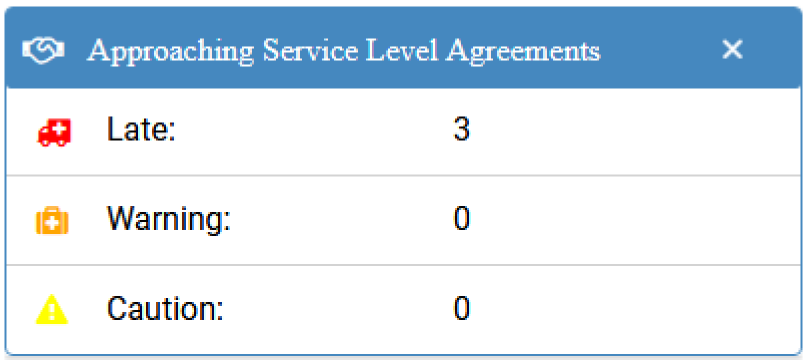
<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td></td><td>

Click here to view screenshots.

New Service Level Agreement Options in Schedule Settings:



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

Case #	Description
	 This is the pop-up message when the Auto Reload option is set up: 

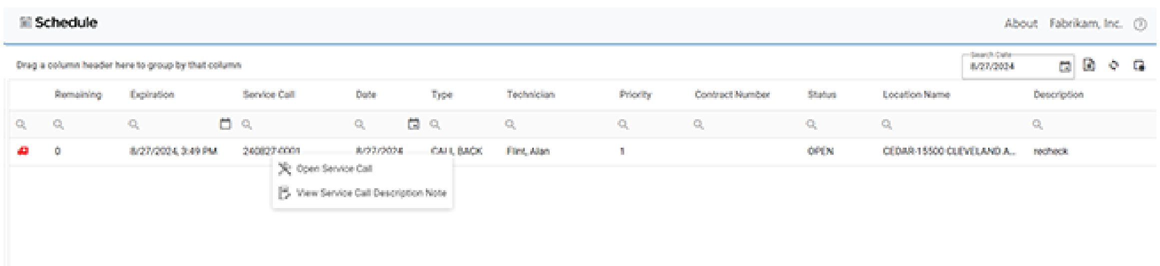
<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SCHED-1912</td><td>

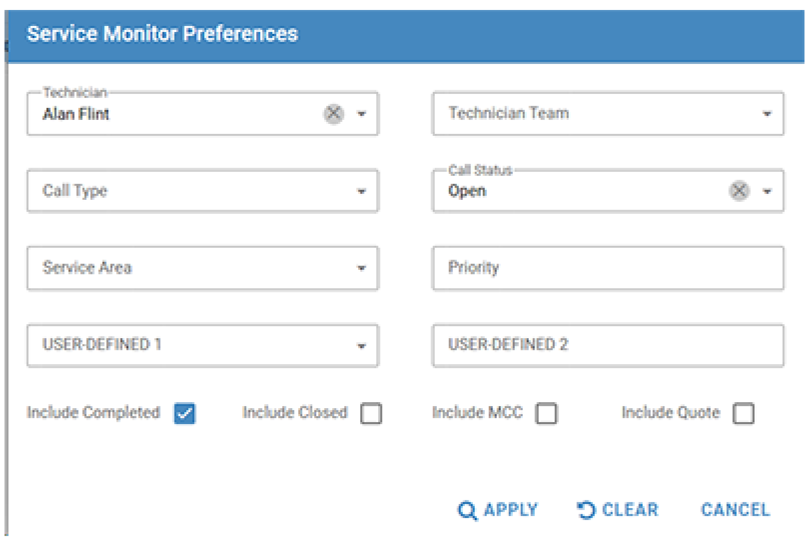
A Service Monitor window has been added that works with service level agreements (SLAs) and visually displays service call data by the icon for the call type. The associated service call can be accessed by right-clicking the appointment and selecting Open Service Call in the Service Monitor window.

Use the Service Monitor Preferences window to restrict the information displayed in the Service Monitor window. If you don't make any entries in the Preferences window, all service calls with appointments scheduled for the current day display. Your selections in the Filter Preferences window serve as defaults each time you open the window; only appointments that fall within those filters display.

See Using the Service Monitor[4].

Click to view screenshots.



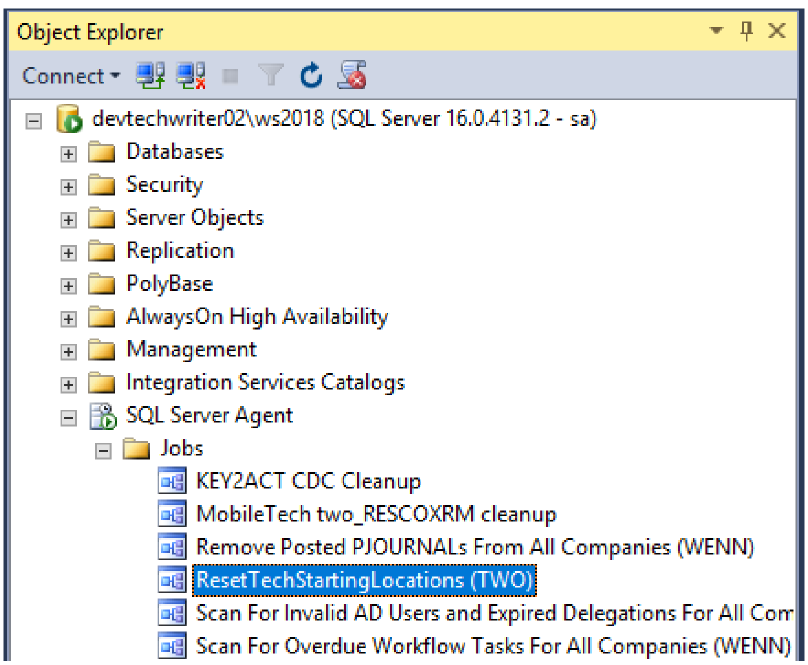


</td></tr>
</table>

4 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/471859201/Using+the+Service+Monitor

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SCHED-1267</td><td>
We've added a ResetTechStartingLocations (Company DB Name) SQL job to automatically reset technicians' starting locations. This SQL job is added for each company selected during your Schedule 2024 upgrade installation. The SQL job defaults to disabled and you will need to enable this in SQL Server Management Studio (SSMS).
The job is set up to run every 8 hours, beginning at midnight. The default run times are midnight, 8 AM, and 4 PM to accommodate three shifts with a two-hour grace period at the end of the shift. The ResetTechStartingLocations job's schedule can be edited. For more information, see <u>Automatically Reset Technician Starting Locations</u>[5].
The ResetTechStartingLocations job does not run during a technician's shift. For example, if a technician's shift is:

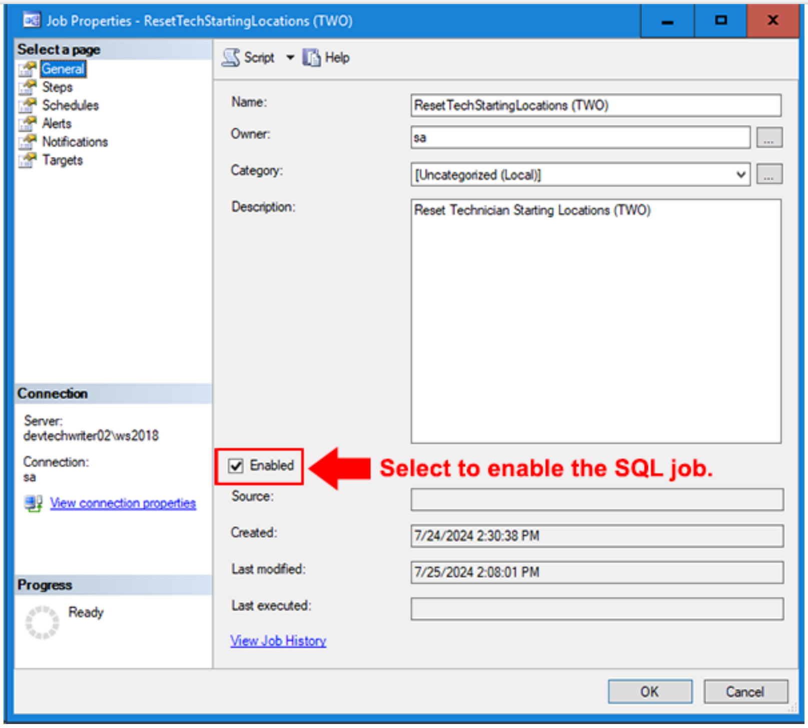
7 AM to 3 PM: It is assumed they are working from 7 AM to 5 PM, so the 8 AM and 4 PM running of the job would not reset their starting location but the midnight run would.
3 PM to 11 PM: It is assumed they are working from 3 PM to 1 AM so the 4 PM and midnight running of the job would not reset their starting location but the 8 AM run would.
11 PM to 7 AM: It is assumed they are working from 11 PM to 9 AM so the midnight and 8 AM running of the job would not reset their starting location but the 4 PM run would.

Click here to view screenshots.


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

[5] https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/414089255/Automatically+Reset+Technician+Starting+Locations

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

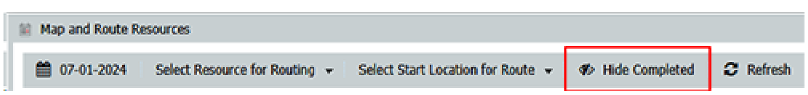


</td></tr>
<tr><td>SCHED-1284</td><td>

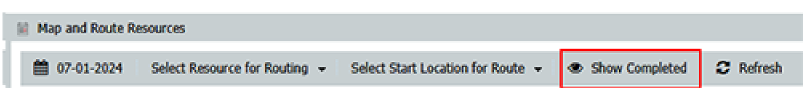
In the Map View, users can now choose to conceal completed appointments. By default, this feature is set to show completed appointments. To hide completed appointments, click *Hide Completed*. The button label changes to Show Completed when the completed appointments are hidden. You can add the completed appointments back by selecting *Show Completed*. See Viewing Appointments on the Map[6].

Click to view screenshot.

Completed appointments are currently displayed when the button label is Hide Completed.



Completed appointments are hidden when the button label is Show Completed.



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

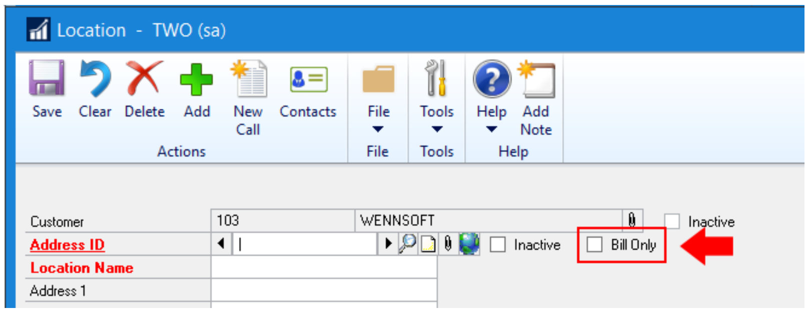
6 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104844154/Viewing+Appointments+on+the+Map

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SCHED-1387</td><td>

Bill Only Locations can now be excluded from the Customer Hub. We've added two options that you can use. Locations can be marked as Bill Only in the Signature Location window. (Microsoft Dynamics GP > Cards > Sales > Customers > Location)

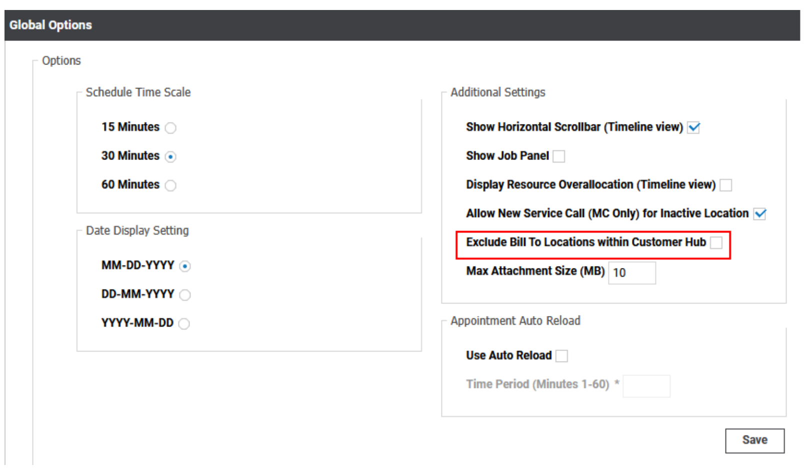
Click to view screenshot.

Mark the Bill Only checkbox on the Location window. (Microsoft Dynamics GP > Cards > Sales > Customers > Location)



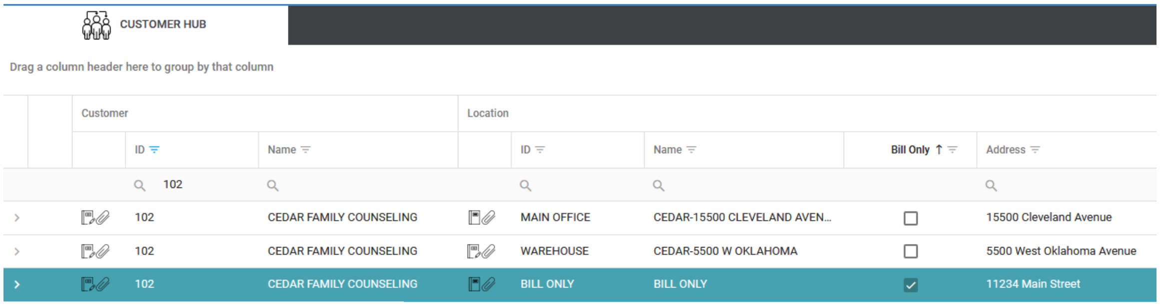
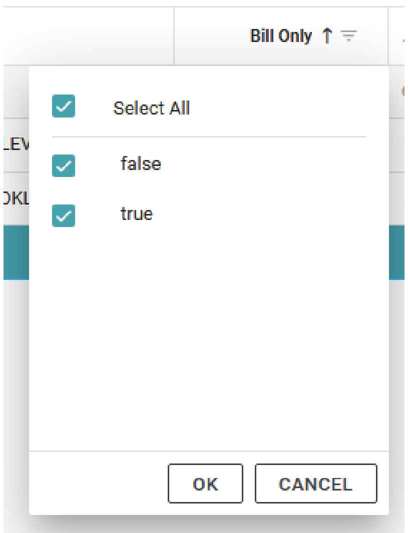
- **Globally**: We've added an **Exclude Bill To Locations within Customer Hub** global setting that when marked, excludes locations marked as Bill Only from the Customer Hub for all users of all companies.

Click to view screenshot.

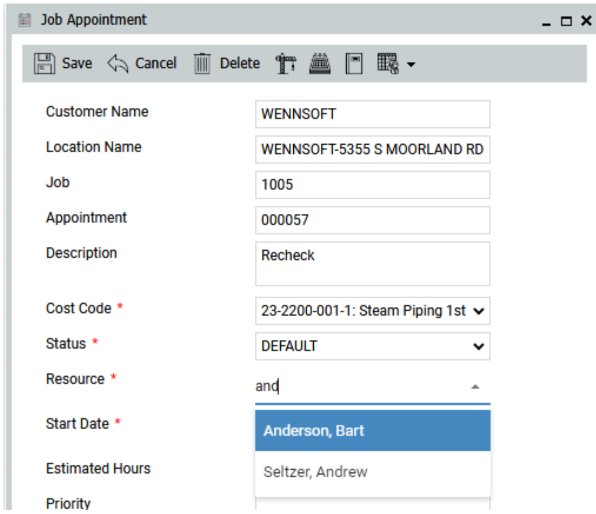


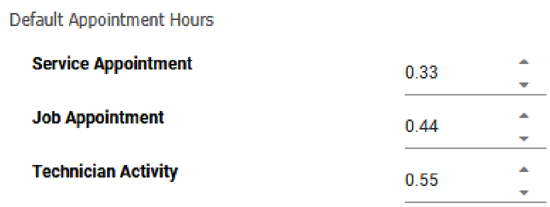
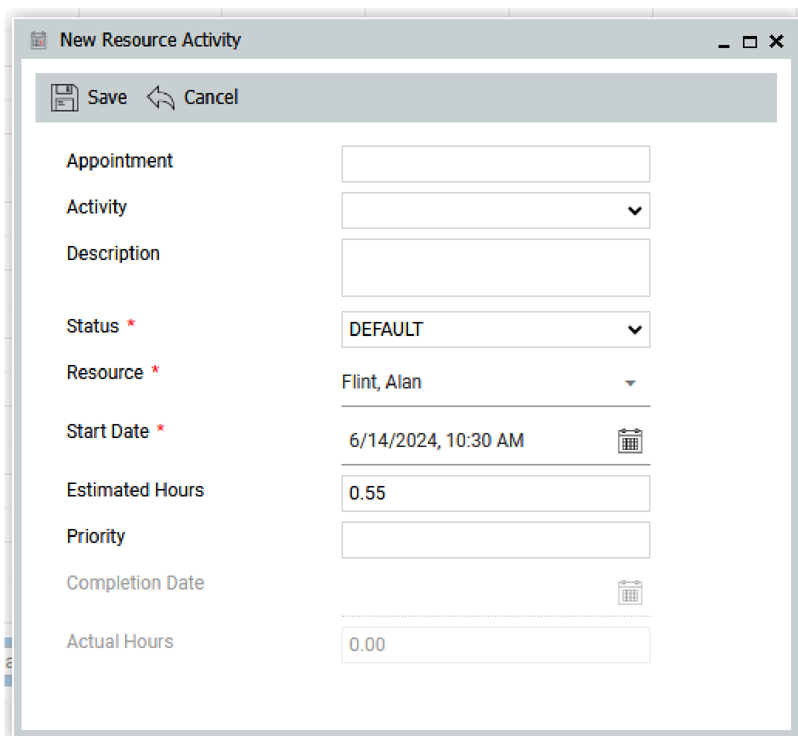
- **Per User**: We've added a new **Bill Only** column to the Customer Hub. Users can set the Bill Only filter to False to hide Bill Only Locations from their view. This option is available if the global setting is not used. The default setting for this column is to show all locations, both Bill Only and non-Bill Only. The new column starts on the far right in the Customer Hub and can be dragged to a different location. Each row shows a read-only marked checkbox if the location is a Bill Only location.
  - **Select All** (True and False): Displays all locations.
  - **True**: Displays only Bill Only addresses.

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

Case #	Description
	• **False**: Displays non-Bill Only addresses. Bill Only addresses are hidden. **Click to view screenshots.**  
SCHED-1388	When using the Find option from the Schedule Board, the Type now defaults to Service Call with the cursor focus in the Service Call ID field so that you can begin typing the service call ID when the Find window opens. See Locating a Record Using Find[7].

7 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104840912/Locating+a+Record+Using+Find

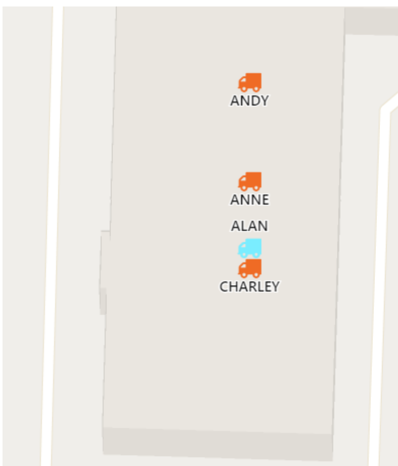
Case #	Description
SCHED-1391	For service appointments, job appointments, and service calls, the Resource field now allows you to filter and quickly locate the technician. As you type, the drop-down menu will display names that match the entered characters. **Click to view screenshot.** 

Case #	Description
SCHED-1392	You can now set a default value for estimated hours when creating a service appointment or service call, a job appointment, and a technician activity. The Default Appointment Hours option is set up in Schedule Settings. The value automatically populates when a zero-hour appointment is dragged to the schedule board and when using the Appointment Wizard after you select the appointment type. See Setting Up Schedule Configuration[8]. **Click to view screenshot.**  

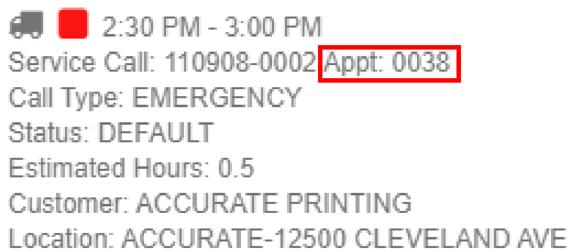
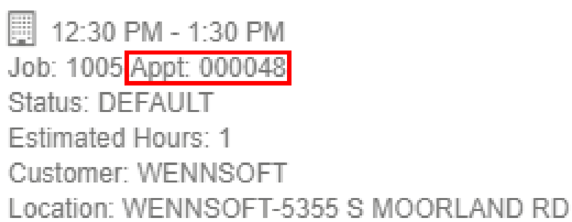
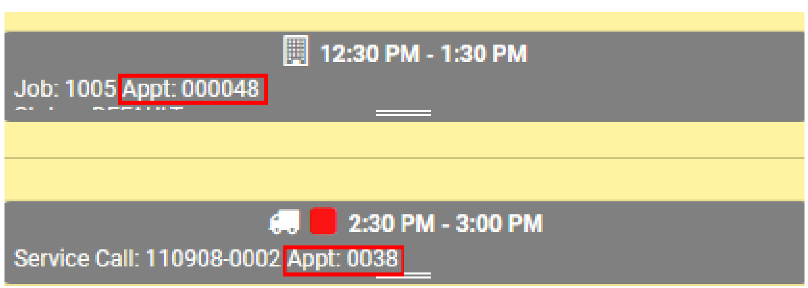
8 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104841267/Setting+Up+Schedule+Configuration

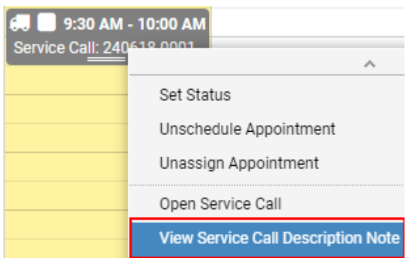
<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SCHED-1393</td><td>Icons can now be displayed for service call types on the Map View in the Configuration section in Schedule Settings. Icon images and names can be found at https://fontawesome.com/v4/icons/. Enter the name exactly as it is displayed. For example, for a handshake icon, enter handshake-o. The colors for each icon can be set up in the Service Call Icon Colors section. You will need to select Use Service Call Type.</td></tr>
<tr><td>SCHED-1394</td><td>Colors can now be assigned to each technician so that their icons display by color on the map. The colors are assigned in Schedule Settings in the Colors section.

In the example below, Alan Flint was assigned a different color. The default color for all employees is bright orange (#ef6b25). You can edit the color by selecting the color field and then enter the hex code, HSL (hue, saturation, and luminosity), or RBG (red, blue, green) values or you can select a color in the chart. See Setting Up Schedule Colors[9].

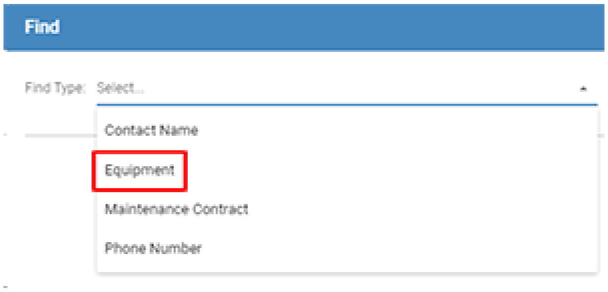
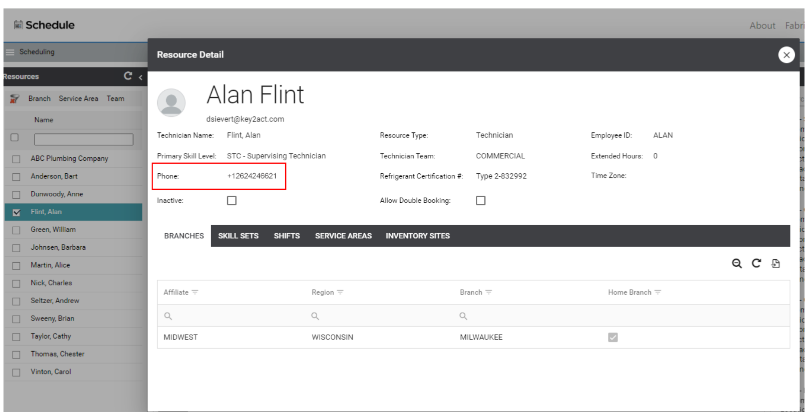
Click to view screenshot.

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

9 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104841293/Setting+Up+Schedule+Colors

Case #	Description
SCHED-1465	The service and job appointment IDs have been relocated to appear to the right of the job or service call ID in the tooltip for appointments on the schedule board. Appointment IDs are now visible on the service and job appointments displayed on the schedule board, as long as the column width is sufficient to show them on a single line. **Click to view screenshots.**   

<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SCHED-1516</td><td>The Service Call Description Note window is now accessible if a note has been added to the service call via the context menu. If a note does not exist, a message displays indicating that there isn't a note.
Right-click on the service appointment and select View Service Call Description Note.
Schedule Board
Unassigned/Unscheduled Grid
Customer Hub Open Appointments Grid
Right-click on the service call and select View Service Call Description Note.
Customer Hub Service Calls Grid
Click to view screenshot.

</td></tr>
<tr><td>SCHED-1571</td><td>Users can now view ALL cost codes for a job in the Job Details section of the Customer Hub. Previously only labor cost codes were displayed. See Viewing the Jobs Tab[10].</td></tr>
<tr><td>SCHED-1572</td><td>We've removed the unused time field from the Service Call Tasks window. Signature and MobileTech do not record the time.</td></tr>
<tr><td>SCHED-1583</td><td>The Service Area drop-downs in the Resources and Appointment Wizard windows now display the Service Area Description. Previously, the Resource drop-down displayed the Service Area ID and the Appointment Wizard drop-down displayed the Service Area Description.</td></tr>
</table>

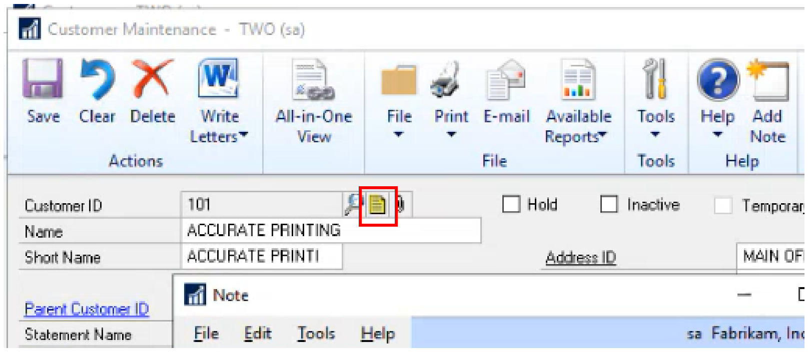
10 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104844090/Viewing+the+Jobs+Tab

Case #	Description
SCHED-1605	We've added an Equipment ID search type to the Find window on the Customer Hub when searching for a location contact. See Locating a Record Using Find[11]. **Click here to view screenshot.** 
SCHED-1680	The technician's telephone number has been added to their Resource Detail window accessed from the Resources list on the Schedule Board. See Viewing Resource Details[12]. **Click to view screenshot.** 

11 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104840912/Locating+a+Record+Using+Find
12 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104843347/Viewing+Resource+Details

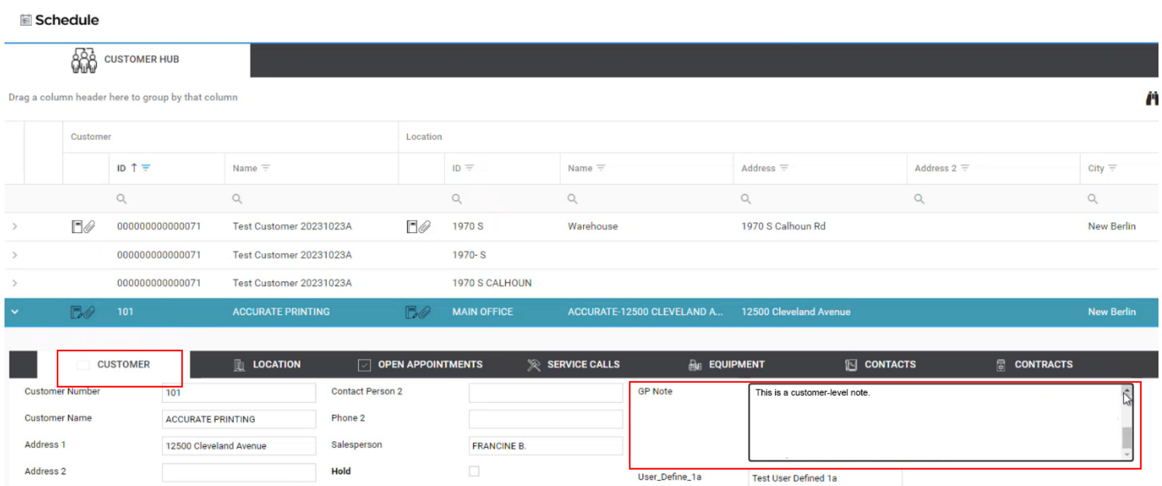
<table>
<tr><th>Case #</th><th>Description</th></tr>
<tr><td>SCHED-1704</td><td>
From the Customer Hub, users can now see notes added at the Customer level in Signature. The notes cannot be added or edited in Schedule. The examples below are for the customer level note.

Click to view screenshot.



In Schedule, the note displays on the Customer tab in the Customer Hub. This note is display-only.

Click to view screenshot.



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

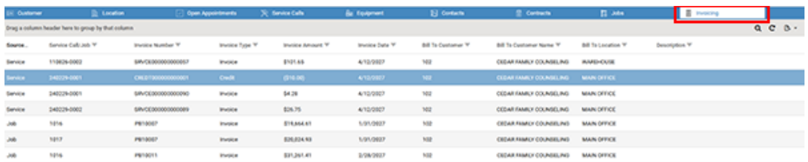
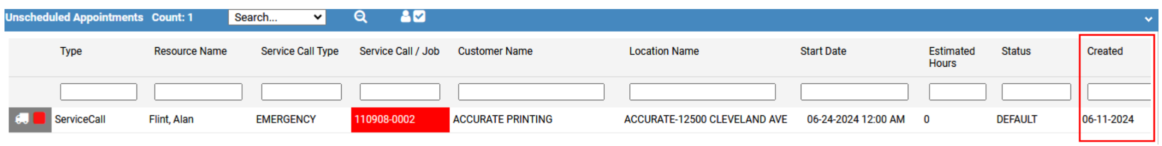
Case #	Description

SCHED-1715	ALL service appointments can no longer be deleted on a service call in Schedule. A service call must have at least one appointment, which is the same functionality in Signature.
	• In the Related Appointments window, if a user attempts to delete all appointments, a message displays that prevents the user from proceeding. The user is returned to the Related Appointments window where they can select one or more appointments and delete provided that at least one appointment remains.
	• On the Appointments window:
	    • If more than one appointment is assigned to a service call, the Delete button is visible and the appointment can be deleted.
	    • If viewing the only appointment for the service call, the Delete button is not visible.
	See Delete a Block of Appointments[13] and Viewing/Editing Service Appointment Details[14].

SCHED-1781, SCHED-1899	The global Show Job Panel setup option from the User Settings tab can now be overridden by a user in their User Profile. See Accessing Your Profile and User Settings[15].
	Examples of the user's ability to override:
	• The Job Panel is displayed in Schedule:
	    • If the global setting Show Job Panel is marked and the user does not change anything in their User Settings.
	    • If the global setting Show Job Panel is not marked and the user marks Show Job Panel in their User Settings.
	• The Job Panel is not displayed in Schedule if the global setting Show Job Panel is marked and the user unmarks Show Job Panel in their User Settings.
	Notes
	• The Use Job Panel option displays if Signature Job Cost is registered. (Global Settings and User Profile windows.)
	• For Use Job Panel option in the User Profile window, the user role must have access to job appointments. (Administration > User Roles)

SCHED-1865	When creating a service call, we are now checking the Service Location to verify the Purchase Order Required option is marked in Signature. If marked, the Customer PO field is required in the Service Call window for all call types except MC. This matches Signature's Service Management functionality.

13 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104843216/Delete+a+Block+of+Appointments
14 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104842463/Working+With+Service+Appointment+Details
15 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104840975/Accessing+Your+Profile+and+User+Settings

Case #	Description
SCHED-1885	Users can now view historical (posted) invoices and credit memos for a customer location. The service call or job associated with the invoice can be viewed from a context-sensitive menu. The Invoicing tab is available if the Schedule user role has the View option marked for Invoicing. The user will also need security access to the Invoice Inquiry window in Signature. For more information, see Viewing the Invoicing Tab[16]. **Click to view screenshot.** 
SCHED-1914	In the Unscheduled grid, users can now see the appointment's Created date. **Click here to view screenshot.** 
SCHED-1919	You can now use Azure Maps with Map View. To use Azure Maps, you must create an Azure Maps account. See Azure Maps Account | Access Subscription Key | Start Free (microsoft.com)[17]. For information about accessing your Azure Maps key, see Additional Installation Information[18] and for information about setting up Map View, see Setting Up Mapping Options[19]. With Microsoft's announcement that they will be deprecating Bing Maps, users can use either Azure Maps or Google Maps to continue using Map View in Schedule.
SCHED-1989	Starting with the Signature 2024 release, we've added the ability to prevent new service calls from being created for on hold customers in Signature and Schedule. The setup for this is done entirely in Signature. 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 customer hold setup** option works with the Stop-and-Go Lights setup option in the Service Options window and a new

16 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/424148996/Viewing+the+Invoicing+Tab
17 https://www.microsoft.com/en-us/maps/azure/get-started?msockid=15d20711541e6a84066e149b55606bcf
18 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104840448/Additional+Installation+Information
19 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104841412/Setting+Up+Mapping+Options

Case #	Description
	security task ID that must be assigned to the user role. In Signature documentation, see Choosing Service Options[20] and Set up Security and Grant User Access[21]. • **New Setup Option**: A new **Authorize specific users to add new calls for customer 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 this new feature, when a user selects New Service Call in Schedule for a customer on hold, one of the following messages is displayed. (For information on how a service call is created in Schedule, see Creating a Service Call[22].) ◦ Those who do not have the security task ID will receive a message they do not have the necessary security privileges to create a new call. ◦ Those 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.
SCHED-2208	Starting with the Signature 2024 release, you can store attachments to Azure Cloud Storage (either WennSoft-hosted or self-hosted). Once you've set up Azure Cloud Storage in Signature, your Schedule attachments will also use Azure Cloud storage. For more information, see the Signature 2024 What's New document.

20 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104826918/Choosing+Service+Options
21 https://wennsoft.atlassian.net/wiki/spaces/sms2024/pages/104825122/Set+up+Security+and+Grant+User+Access
22 https://wennsoft.atlassian.net/wiki/spaces/sched2024/pages/104842766/Creating+a+Service+Call