




## What's New in Schedule 2022 (5.0)

**Release Version:** 5.0.24

**Release Date:** November 2022






Case #	Description
SCHED-1225	<p>When creating a service call with a call type of MC (maintenance contract), a message now displays when the equipment selected is not covered by a contract. The message "Equipment ID &lt;ID&gt; is not covered by Contract &lt;Contract Number&gt;." has an OK and Cancel button. Selecting OK leaves the selection of the current field (equipment ID or contract number). Selecting Cancel returns the user to the Service Call window with the current field cleared (Equipment ID, Contract, or Call Type).</p> <p>The message displays in the following scenarios:</p> <ul style="list-style-type: none"><li>• The call type is MC, the contract is selected and then the equipment is selected.</li><li>• The call type is MC, equipment is selected and then the contract is selected.</li><li>• The contract and equipment are selected and then the call type is changed to MC.</li></ul>
SCHED-1299	<p>Users can now add, edit, and/or remove field purchase orders in Schedule. A purchase order that is entered in MobileTech or Schedule must be reviewed, committed, and processed in Service Management and Microsoft Dynamics GP Purchasing before costs that are associated with the purchase order can be processed in the system. See <a href="#">Working with Purchase Orders</a><sup>12</sup>.</p> <div><p> To allow users in MobileTech or Schedule to quickly work and provide information to customers in the field, purchase orders for service invoices and field invoices do not include taxes unless the invoices have been received in the Purchasing module of Microsoft Dynamics GP.</p></div> <p>We've added new Role Permissions for purchase orders so that you can limit your Schedule users to view, edit, and/or delete. (Administration &gt; User Roles) See <a href="#">Working with Roles</a><sup>34</sup>.</p>

<sup>1</sup> <https://docs.key2act.io/display/SCHED50/Working+with+Purchase+Orders>

<sup>2</sup> <https://docs.key2act.io/display/SCHED50/Working+with+Purchase+Orders>

<sup>3</sup> <https://docs.key2act.io/display/SCHED50/Working+with+Roles>

<sup>4</sup> <https://docs.key2act.io/display/SCHED50/Working+with+Roles>

Case #	Description
SCHED-1275, SCHED-1450, SCHED-1451, SCHED-1458, SCHED-1521	<p>Users can now add and edit equipment and component equipment from the Customer Hub. You can access the new Equipment tab by selecting the customer's service location. Right-click anywhere within the Equipment tab to access the Add Equipment, Edit Equipment, Add Note, View Note, Add Attachment, and/or View Attachment options from the context menu. See <a href="#">Working with Equipment</a><sup>56</sup>.</p> <p>On the Equipment tab, you can view the following columns.</p> <ul style="list-style-type: none"> <li>• Notes - Displays  if the note is empty or  if a note is attached.</li> <li>• Attachments - Displays  if no attachment exists or  if a file is attached.</li> <li>• Equipment ID</li> <li>• Description</li> <li>• Component</li> <li>• Master Equipment ID</li> <li>• Component Quantity</li> <li>• Contract</li> <li>• Equipment Type</li> <li>• Manufacturer</li> <li>• Model Number</li> <li>• Serial Number</li> <li>• Barcode</li> <li>• Installed By</li> <li>• Installed Date</li> <li>• Warranty Exp Date</li> <li>• Ext Warranty Expiration Date</li> <li>• Building ID</li> <li>• Building Room</li> <li>• Suspended MCC</li> <li>• Inactive/Retired</li> <li>• User_Defined_1a</li> </ul> <div style="border: 1px solid yellow; padding: 10px; margin-top: 10px;"> <p> If you do not want your users to be able to view the Equipment tab in the Customer Hub and/or edit (and create) equipment records, you can edit the Equipment role permissions. The View and Edit checkboxes default as marked. See <a href="#">Working with Roles</a><sup>78</sup>.</p> </div>

<sup>5</sup> <https://docs.key2act.io/display/SCHED50/Working+with+Equipment>

<sup>6</sup> <https://docs.key2act.io/display/SCHED50/Working+with+Equipment>

<sup>7</sup> <https://docs.key2act.io/display/SCHED50/Working+with+Roles>

<sup>8</sup> <https://docs.key2act.io/display/SCHED50/Working+with+Roles>