

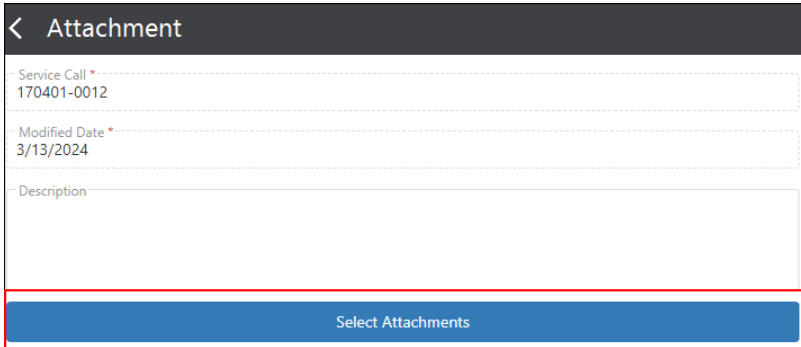


What's New in MobileTech 2024 (10.0)

Release Version: 2024 (10.0.63)

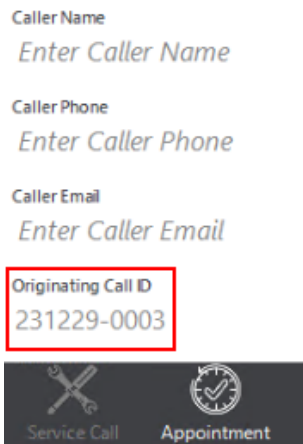
Release Date: November 2024

General


Case #	New Feature
MT-1159	We've added Department and Position to the Employee lookup when entering helper technician time entries. The lookup is searchable by name, department, and position. UseTechnicianHelper must be set to True in Mobile Device Global Settings ¹ for technicians to be able enter time entries for technician helpers.
MT-1171	<p>Technicians can now add multiple attachments at one time by selecting the new Select Attachments button on the Attachment form. If a description was entered before attaching the files, the description will apply to all the files. The description can be edited by selecting the specific file and then selecting More to enter a description for that attachment. As before, the type of file that can attached is dependent on the device hardware. Attachments can be added to service calls, appointments, equipment, locations, tasks, and time entries. See Working With Attachments².</p> <p>Click to view screenshot.</p> 
MT-1175	The Synced Devices Last Synchronized column in MobileTech Admin has been updated to sort by DateTime to provide a more accurate sorting. Previously this was sorting the date as a string.

¹ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104793197/Mobile+Device+Global+Settings>

² <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104797236/Working+With+Attachments>

Case #	New Feature
MT-1184	<p>We've added the Originating Service Call ID information to the MobileTech Service Call screen. This is a read-only field and the information originates from Signature.</p> <p>Click to view screenshot.</p> 
MT-1201	<p>Location attachments are now supported in MobileTech. Technicians can add, edit, or view attachments for service and job locations from the new Attachments tab from the Locations form. The attachments can be added from Signature or MobileTech. See Working With Attachments³.</p>

³ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104797236/Working+With+Attachments>

Case #	New Feature
MT-1203, MT-1255	<p>We've added a Jobs icon on the home screen that displays a list of jobs that can be selected to display more information or the technician can create a new job appointment for this job. Technicians can search and filter the list. The list can also be sorted by date or location. Technicians can display only the jobs on their device with DEVICE MODE or, by selecting SERVER MODE to search for a job in the Middle Tier or all active jobs in Signature depending on the setting for IncludeAllActiveJobs in Job Settings⁴. Searching using Server Mode requires an internet connection. See Jobs and Job Appointments⁵.</p> <p>Technicians can now:</p> <ul style="list-style-type: none"> • Create a new job appointment from the job list or the job appointment list. For information on how to create a new job appointment for a job, see Create a Job Appointment⁶. • Create a labor time entry associated with a job instead of with a job appointment. <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p> • Using SERVER MODE requires the UseServerMode option set to True in Mobile Device Global Settings in MobileTech Setup Options. See Mobile Device Global Settings⁷.</p> <p>• The default records fetched is 3, however, you can update this number using ServerJobCount in Job Settings⁸.</p> <p>• If you do not want your technicians to be able to create job appointments for the selected job, you can set AllowCreateJobAppointments to False in Job Settings⁹.</p> </div> <p>There is a new Job Settings¹⁰ section in MobileTech Setup Options:</p> <ul style="list-style-type: none"> • ShowJobList: Determines if the Job icon displays on the Home screen. Technicians can select this to view the list of jobs on their devices. The default value is True. See Create a Job Appointment¹¹. • IncludeAllActiveJobs: Determines if all active jobs from Signature display in the Job List. The default value is True. If False, only jobs with active appointments in MobileTech will display. • ServerJobCount: Determines the number of job records that are displayed when job data is requested from the server. The default value is 3. • AllowJobTimeEntries: Determines if technicians can create time entries for a job instead of the job appointment. The default value is True. See the description below for MT-1283. • AllowCreateJobAppointments: Determines if technicians can create job appointments in MobileTech. The default value is set to True.
MT-1241	<p>We've added a “+” button to the Tasks form to create a new piece of equipment. On the Tasks form, users can now access the Equipment form to create a new piece of equipment by selecting the + button to the right of the All Equipment dropdown. On the Equipment form, users can select the < button to return to the</p>

4 <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/173670410/Job+Settings>

5 <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/122126378/Jobs+and+Job+Appointments>

6 <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/122322945/Create+a+Job+Appointment>

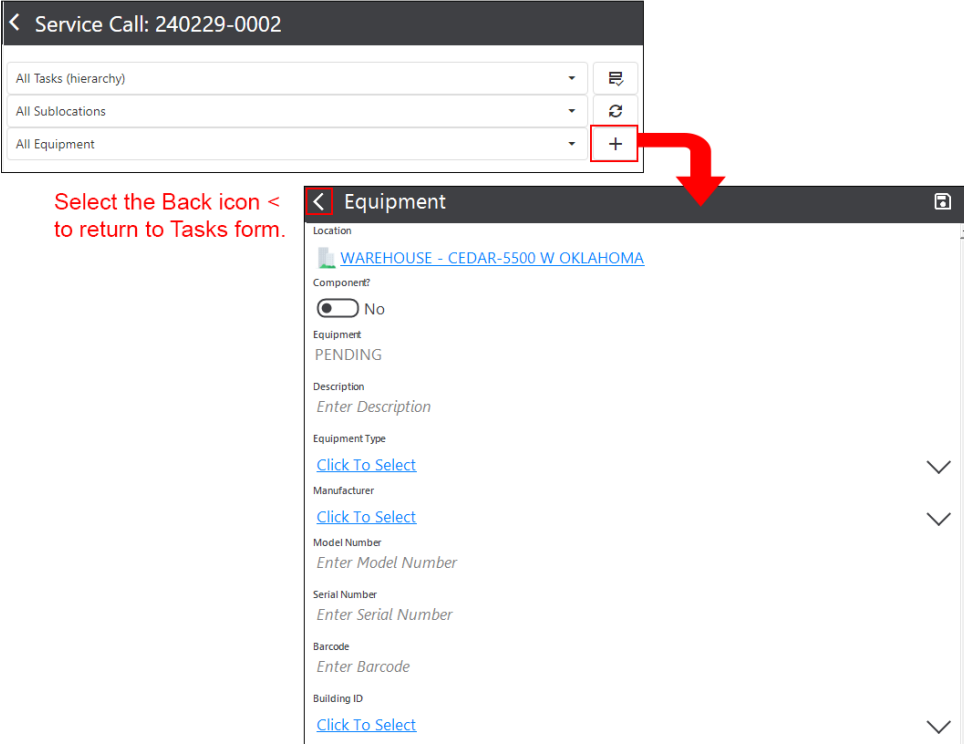
7 <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104793197/Mobile+Device+Global+Settings>

8 <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/173670410/Job+Settings>


9 <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/173670410/Job+Settings>

10 <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/173670410/Job+Settings>

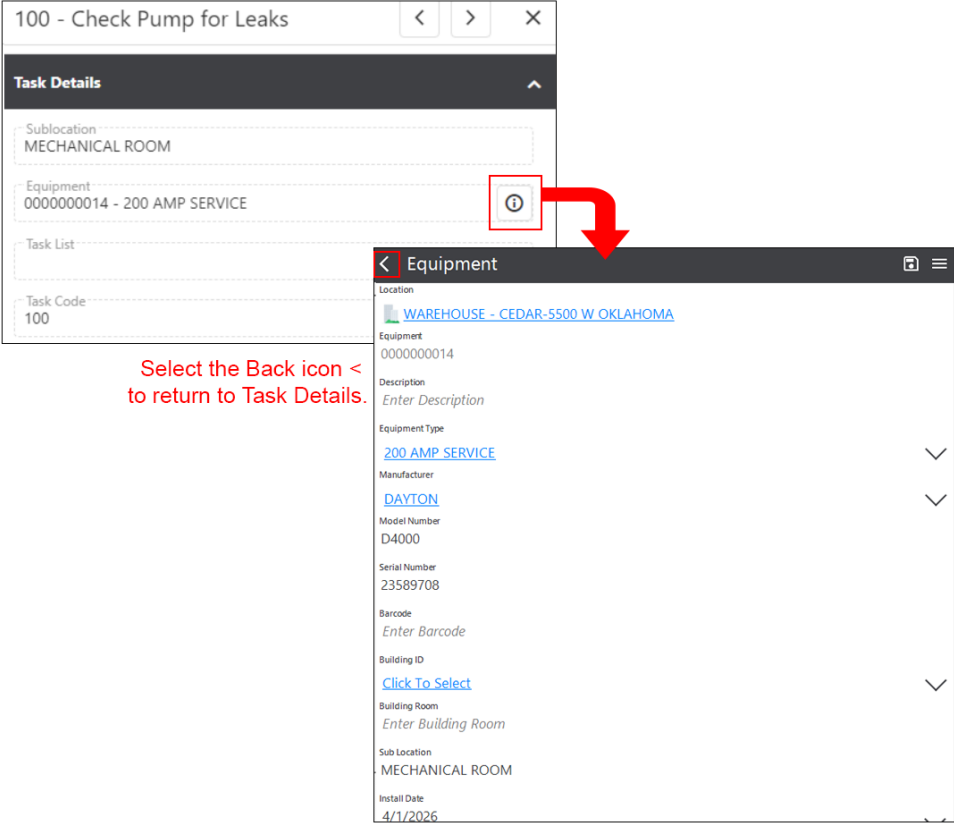
11 <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/122322945/Create+a+Job+Appointment>

Case #	New Feature
	<p>Tasks form. The equipment will be automatically assigned to the service call. See Complete Tasks for a Service Call¹².</p> <p>Click to view screenshot.</p>  <p>Select the Back icon < to return to Tasks form.</p>

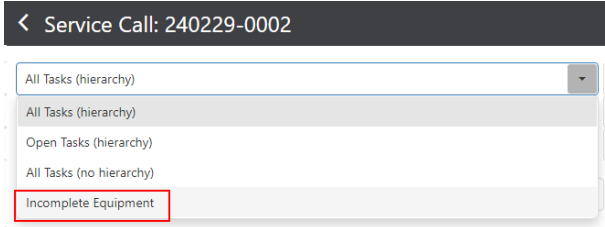
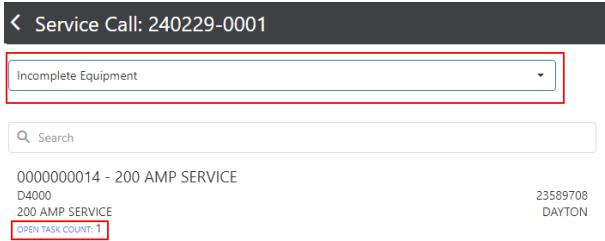
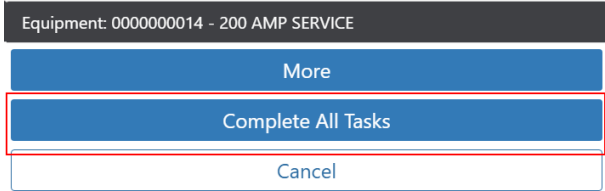
¹² <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104797109/Complete+Tasks+for+a+Service+Call>

Case #	New Feature
MT-1238, MT-1300, MT-1647	<p>When a technician assigns equipment to service calls, the associated equipment types' tasks can now be automatically assigned to the call instead of the DEFAULT task.</p> <p>Three new setup options were added to Task Settings¹³ in MobileTech Admin Setup Options. The default value is False for all three options. The value needs to be set to True to enable the feature.</p> <ul style="list-style-type: none"> • UseEquipmentAssignmentforMCC • UseEquipmentAssignmentforMC • UseEquipmentAssignmentforNonMC <p>To use the new functionality on the device, with the appropriate option(s) set to True and the call type selected matches the setting when assigning equipment to the call or creating new equipment:</p> <ul style="list-style-type: none"> • The DEFAULT task will be created if the equipment type is NOT populated. • If the equipment type is populated: <ul style="list-style-type: none"> • If the equipment type has a task list, and the task list has records in the master tables, the related tasks, subtasks, and responses will be created instead of the DEFAULT task. • If the equipment type does not have a task list, the DEFAULT task will be created. <div data-bbox="298 835 1490 1150" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> Notes:</p> <ul style="list-style-type: none"> • If the technician is creating a new piece of equipment and the setup option AllowModifyNewEquipmentID = False, the task list on the task, task response, and subtask are not updated from PENDING until the next sync. • If the user does not sync after assigning the equipment to the service call, the user can unassign the equipment, and all related tasks, task responses, and sub-tasks are deleted. • The default task status assigned to any created task will be from the setup option DefaultTaskStatus. </div>

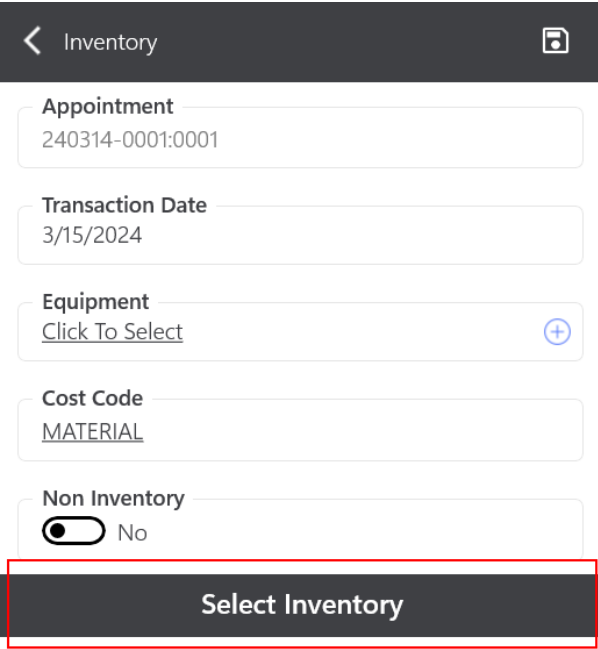
¹³ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104793363/Task+Settings>

Case #	New Feature
MT-1244	<p>We've added a hyperlink on the Equipment field on the Task Details page to navigate directly to the equipment form allowing the user to modify the equipment record. Users can click the < button to return to the Task Details page. See Entering Task Details on Complete Tasks for a Service Call¹⁴.</p> <p>IMPORTANT: If the Sublocation field is updated on the equipment form, only the equipment's sublocation is updated, the task sublocation is NOT updated for <i>existing</i> tasks (because this is a key segment). Any <i>future</i> created tasks will have the updated equipment sublocation.</p> <p>Click to view screenshot.</p>  <p>Select the Back icon < to return to Task Details.</p>

¹⁴ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104797109/Complete+Tasks+for+a+Service+Call>


Case #	New Feature
MT-1274	<p>We've added an "Incomplete Equipment" view to the task list drop-down. When selected, any equipment that have at least one open task is displayed. Users can select the equipment and select a new Complete Tasks action item to complete the open task(s). A confirmation pop-up displays to verify that the tasks should be completed. See Complete Tasks for a Service Call¹⁵.</p> <p>Click to view screenshots.</p>   

¹⁵ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104797109/Complete+Tasks+for+a+Service+Call>

Case #	New Feature
MT-1254	<p>When adding consumed inventory, technicians can now multi-select up to 5 site inventory items to add to the appointment. The quantities can be edited on the initial form and after the initial creation. See Enter an Inventory Transaction Before Completing an Appointment¹⁶.</p> <p>From the Inventory tab, technicians click the new Select Inventory button.</p> <p>Click to view screenshot.</p>  <p>The screenshot shows a mobile application interface for an 'Inventory' form. At the top, there is a dark header with a back arrow and the word 'Inventory', and a save icon. Below the header are several form fields: 'Appointment' with the value '240314-0001:0001', 'Transaction Date' with '3/15/2024', 'Equipment' with a 'Click To Select' link and a plus icon, 'Cost Code' with 'MATERIAL', and 'Non Inventory' with a toggle switch set to 'No'. At the bottom of the form, a dark button labeled 'Select Inventory' is highlighted with a red rectangular border.</p> <p>On the Site Inventory window, technicians can select up to 5 site inventory items. The selected items are highlighted in gray and displayed in the top preview section. To unselect an item, just click the item again. Select the Save icon to return to the Inventory form.</p> <p>Click to view screenshot.</p>

¹⁶ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104797905/Enter+an+Inventory+Transaction+Before+Completing+an+Appointment>

Case #	New Feature										
	<div data-bbox="300 285 1089 1003" style="border: 1px solid #ccc; padding: 10px;"> <div style="background-color: #333; color: white; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> < Site Inventory 📄 </div> <p style="font-size: 0.8em; margin-top: 5px;">Select up to 5 inventory items 1-A3261A, 1-A3483A, 128 SDRAM</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> ↑ Item Number ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> Q Search </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <tr style="background-color: #f2f2f2;"> <td style="padding: 5px;">1-A3261A Multi-Core Processor SITE: 01-N UNIT: Each</td> <td style="text-align: right; padding: 5px; font-size: 0.8em; color: #0070c0;">QTY AVAILABLE: -4.00</td> </tr> <tr style="background-color: #f2f2f2;"> <td style="padding: 5px;">1-A3483A SIMM EDO 72 SITE: 01-N UNIT: Each</td> <td style="text-align: right; padding: 5px; font-size: 0.8em; color: #0070c0;">QTY AVAILABLE: -3.00</td> </tr> <tr style="background-color: #f2f2f2;"> <td style="padding: 5px;">128 SDRAM 128 meg SDRAM SITE: 01-N UNIT: Each</td> <td style="text-align: right; padding: 5px; font-size: 0.8em; color: #0070c0;">QTY AVAILABLE: 0.00</td> </tr> <tr style="background-color: #f2f2f2;"> <td style="padding: 5px;">1GPROC 1 Ghz Processor SITE: 01-N UNIT: Each</td> <td style="text-align: right; padding: 5px; font-size: 0.8em; color: #0070c0;">QTY AVAILABLE: 0.00</td> </tr> <tr style="background-color: #f2f2f2;"> <td style="padding: 5px;">24X IDE 24x CD-ROM SITE: 01-N UNIT: Each</td> <td></td> </tr> </table> </div> <ul style="list-style-type: none"> <i>If only one inventory item is added</i>, the Quantity, List Price, Unit Cost, List Price, and Description are displayed and can be edited. The Price and Cost display is based on your company’s setup option for ShowInventoryCost and ShowInventoryPrice. <ul style="list-style-type: none"> Quantity: Enter the number of units. Unit Cost: Enter the cost per unit. This field might not be displayed, depending on the setup. List Price: Enter the list price per unit. This field might not be displayed, depending on the setup. You can't enter negative list prices for items that have an item type of Sales Inventory, Discontinued, or Kit. Description: If you select a site inventory number, information about the item is displayed. If the transaction is for a non-inventory item, you can enter a description of the inventory transaction. <i>If more than one inventory item is added</i>, only the Quantity can be edited for the Site Inventory items displayed in the grid below the Select Inventory button. The price, cost, and description are not displayed and this will be auto-populated from the site inventory item. <ul style="list-style-type: none"> If you need to change items, click the Select Inventory button again and you can make your changes. You can edit the inventory item by saving the form and then opening the Inventory tab again. Then select the inventory item and edit as needed and then save the edits. 	1-A3261A Multi-Core Processor SITE: 01-N UNIT: Each	QTY AVAILABLE: -4.00	1-A3483A SIMM EDO 72 SITE: 01-N UNIT: Each	QTY AVAILABLE: -3.00	128 SDRAM 128 meg SDRAM SITE: 01-N UNIT: Each	QTY AVAILABLE: 0.00	1GPROC 1 Ghz Processor SITE: 01-N UNIT: Each	QTY AVAILABLE: 0.00	24X IDE 24x CD-ROM SITE: 01-N UNIT: Each	
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24X IDE 24x CD-ROM SITE: 01-N UNIT: Each											

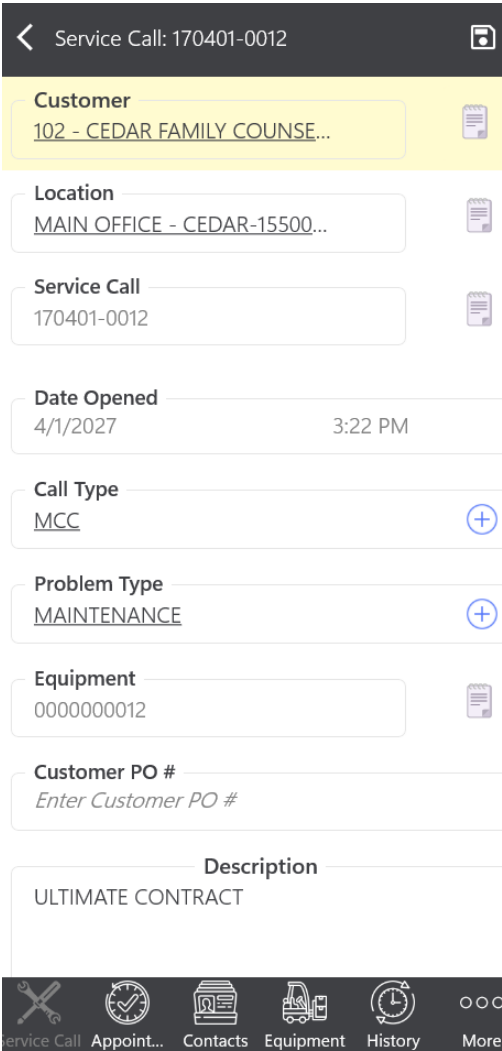
Case #	New Feature
MT-1257	<p>We've added validation to the Task form so that if a technician has made changes on the task form and then selects the X to close the window, they will now be prompted to Save and Close, Discard Changes, or Continue Editing. See Complete Tasks for a Service Call¹⁷.</p>
MT-1264	<p>We've updated the Conflict Resolution to Device Wins for appointments, service calls, tasks, subtasks, and task responses. With this update to Device Wins, only the fields changed on the client are uploaded. If the changes on the server affected different fields than on the app, both changes are preserved. If the same field is changed in both databases, server values are overwritten.</p> <p>Previously, we were using Device Wins (Full), where the whole client record, including unchanged field values, is sent to the server. Server changes are lost.</p> <p>For more information, see Conflict resolution - Resco's Wiki¹⁸ (external link).</p>
MT-1283	<p>Technicians can now create a time entry for job labor without requiring a job appointment.</p> <p>This time entry can be created by accessing Time Entries or the Job List. See Create Time Entry for Job Labor w/o Appointment¹⁹.</p> <p>If you do not want your technicians to be able to create a time entry for jobs without an appointment, you can turn this feature off by setting the AllowJobTimeEntries in Job Settings to False. This option defaults to True. See Job Settings²⁰.</p> <div data-bbox="297 999 1490 1077" style="border: 1px solid yellow; padding: 5px; margin-top: 10px;"> <p> Note: Manager Approval is not supported for this feature.</p> </div>

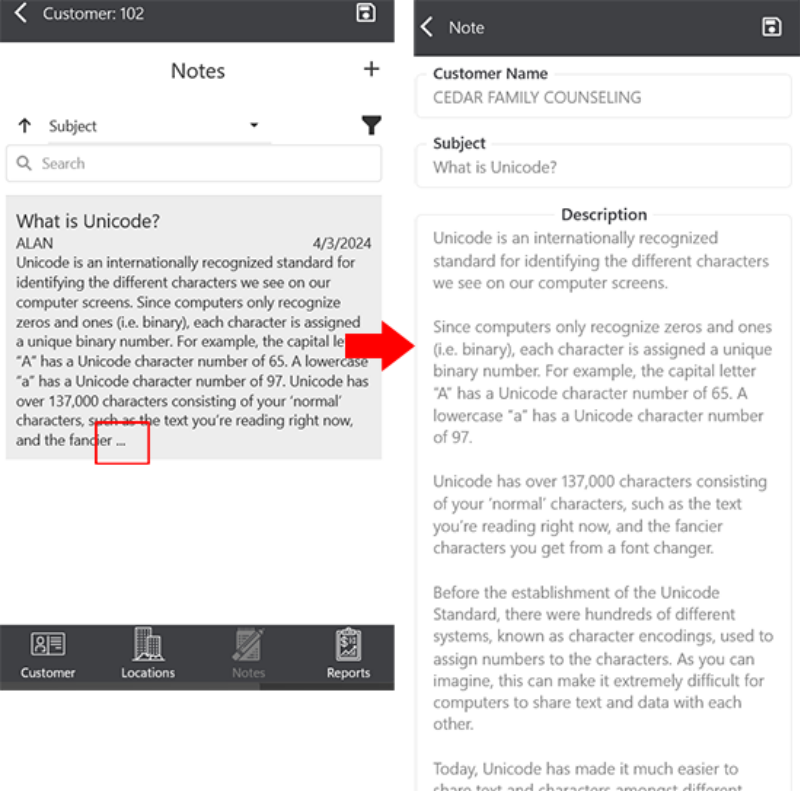
¹⁷ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104797109/Complete+Tasks+for+a+Service+Call>

¹⁸ https://docs.resco.net/wiki/Conflict_resolution

¹⁹ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/173244417/Create+Time+Entry+for+Job+Labor+w+o+Appointment>

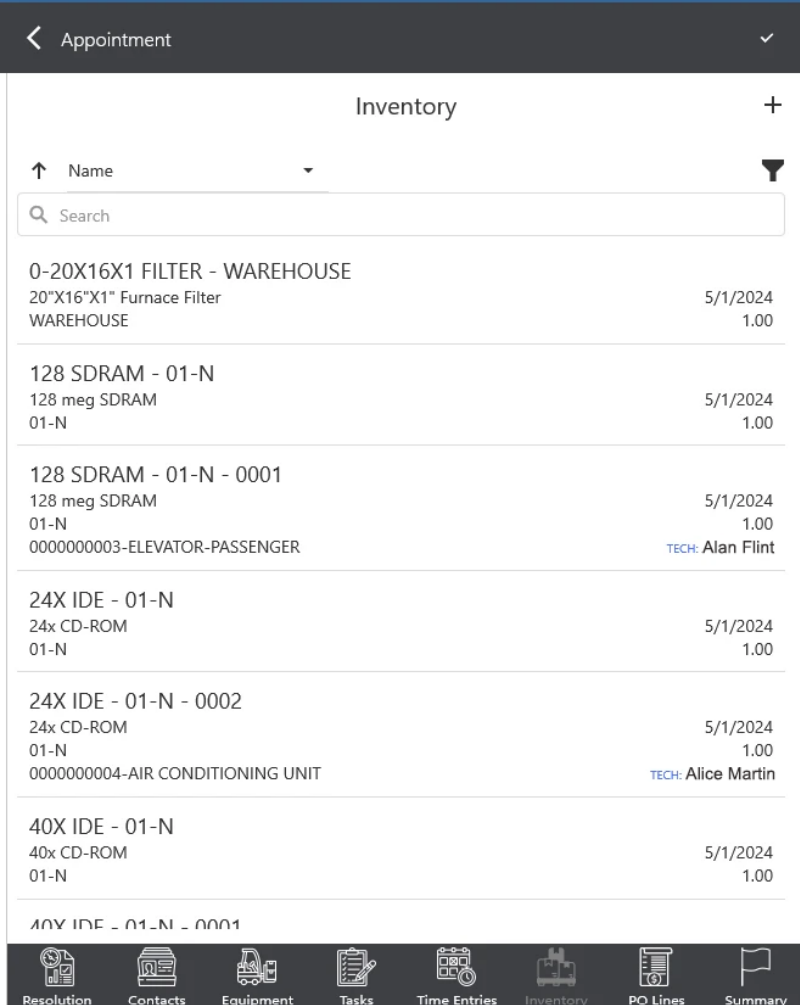
²⁰ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/173670410/Job+Settings>

Case #	New Feature
MT-1290	<p>We've made notes more visible in MobileTech.</p> <ul style="list-style-type: none"> • If an entity has a note attached, the background color is yellow. For example, if the customer has a note attached, the background color of the customer displayed on the service call form is yellow. • A note icon now displays to the right of any entity that supports notes (such as service appointments, locations, service calls, job change orders, equipment, and equipment contracts). This icon displays regardless of a note available. Users can select the note icon to open the notes form where a note can be added or the list of notes is displayed. <p>Click to view screenshot.</p>  <p>The screenshot shows a mobile application interface for a service call. At the top, there is a dark header with a back arrow, the text 'Service Call: 170401-0012', and a save icon. Below the header, several form fields are visible: 'Customer' (102 - CEDAR FAMILY COUNSE...), 'Location' (MAIN OFFICE - CEDAR-15500...), 'Service Call' (170401-0012), 'Date Opened' (4/1/2027 3:22 PM), 'Call Type' (MCC), 'Problem Type' (MAINTENANCE), 'Equipment' (0000000012), and 'Customer PO #' (Enter Customer PO #). A 'Description' field contains the text 'ULTIMATE CONTRACT'. At the bottom, there is a navigation bar with icons for 'Service Call', 'Appoint...', 'Contacts', 'Equipment', 'History', and 'More'.</p>

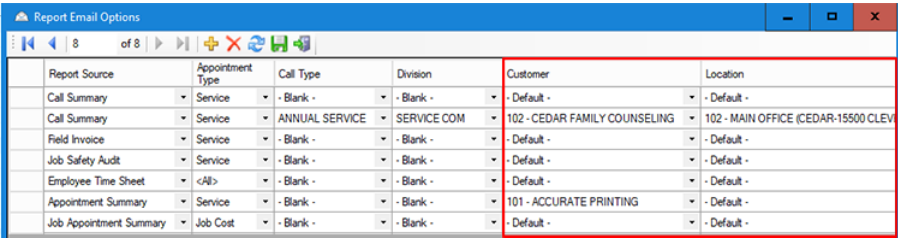
Case #	New Feature
	<ul style="list-style-type: none"> The maximum number of characters displayed for each note in the list is 500 characters. If you would prefer to have more characters displayed, the maxDisplayLength value in the Resco Offline HTML file found at entity\notes\note-list.html can be edited. <p>If the note length exceeds the maxDisplayLength, "..." is added to the display to indicate more text is available for the note.</p> <p>Click to view screenshot.</p>  <p>The screenshot shows two parts of the application. On the left, a 'Notes' screen for 'Customer: 102' displays a list of notes. The first note is 'What is Unicode?' with a date of 4/3/2024. The description is truncated with 'and the fancier ...'. A red arrow points to this truncated text. On the right, a 'Note' screen shows the full details of the 'What is Unicode?' note, including the customer name 'CEDAR FAMILY COUNSELING' and the full description of Unicode.</p>
MT-1324	<p>We've added validation when creating maintenance contract (MC) service calls to align with the validation required in Signature. When a technician creates a new MC service call, they must add a piece of equipment covered by a maintenance contract.</p> <p>If the technician creates a new MC service call and clicks Save, the call will not be created if:</p> <ul style="list-style-type: none"> No equipment is selected. The message "Equipment is required for Call Type MC" is displayed. Equipment is added to the MC service call but isn't assigned to a contract. The message "Equipment must be covered by a contract for Call Type MC" is displayed.

Case #	New Feature
MT-1341	<p>You can now enable a background sync when an appointment status is changed. When the status of an appointment is changed on the device, whether manually or automatically, a background sync is performed to push the data into Signature to get closer to real-time appointment status in the back office. You also have the option to send latitude and longitude values, if available, when the background sync is performed.</p> <p>Changes are not pushed if:</p> <ul style="list-style-type: none"> • Appointment only exists in MobileTech (new appointment not synced yet) • Appointment in Signature already has status “RE-ASSIGN” or “COMPLETE” • Appointment in Signature has been assigned to another tech • MobileTech Appointment Status is “DEFAULT” or “COMPLETE” <p>We've added two setup options to Mobile Device Global Settings²¹:</p> <ul style="list-style-type: none"> • UseAppointmentStatusBackgroundSync: Determines if a background sync is performed when the appointment status is changed manually or automatically on the device. This option requires an internet connection and applies to all appointment types. The default value is False. When this option is set to True, only the appointment status is pushed during the background sync. • IncludeLocationWithAppointmentStatusSync Determines if latitude and longitude are included in the automatic background sync. This option applies to job and service appointments. The default value is False. This option is enabled when UseAppointmentStatusBackgroundSync is set to True. When both options are set to True, only the appointment status and GPS information is pushed during the background sync.

²¹ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104793197/Mobile+Device+Global+Settings>


Case #	New Feature
MT-1386	<p>Technicians can now view inventory added to a service call by other technicians and from the Signature back office from the Appointment Completion form for service appointments when they select the Inventory tab. The inventory items are read-only. The technician's name is displayed on the list view and the Summary tab. (If the employee name isn't available the GP Technician ID displays.) This is only for service appointments. Job appointments will only show inventory added to that job appointment by the current technician and from the Signature back office.</p> <p>Click to view screenshots.</p>  <p>The screenshot displays a mobile application interface for viewing inventory. At the top, there is a dark header with a back arrow and the text 'Appointment'. Below this is a section titled 'Inventory' with a plus sign icon. A search bar with a magnifying glass icon and the text 'Search' is present. The inventory list contains several items, each with a description, a date, and a quantity. The items are: <ul style="list-style-type: none"> 0-20X16X1 FILTER - WAREHOUSE: 20"X16"X1" Furnace Filter, 5/1/2024, 1.00 128 SDRAM - 01-N: 128 meg SDRAM, 5/1/2024, 1.00 128 SDRAM - 01-N - 0001: 128 meg SDRAM, 5/1/2024, 1.00, TECH: Alan Flint 24X IDE - 01-N: 24x CD-ROM, 5/1/2024, 1.00 24X IDE - 01-N - 0002: 24x CD-ROM, 5/1/2024, 1.00, TECH: Alice Martin 40X IDE - 01-N: 40x CD-ROM, 5/1/2024, 1.00 40X IDE - 01-N - 0001 At the bottom, there is a navigation bar with icons for Resolution, Contacts, Equipment, Tasks, Time Entries, Inventory, PO Lines, and Summary. </p>

Case #	New Feature
	<div data-bbox="298 285 1091 495"><p>← Appointment ✓</p></div> <hr/> <div data-bbox="315 520 565 554"><h3>Consumed Inventory</h3></div> <div data-bbox="331 583 750 611"><p>Item: 0-10W35 ENGINE OIL - 10W35 Engine Oil, Qty: 1</p></div> <hr/> <div data-bbox="331 632 630 659"><p>Item: 1GPROC - 1 Ghz Processor, Qty: 2</p></div> <hr/> <div data-bbox="331 680 763 707"><p>Item: 1GPROC - 1 Ghz Processor, Qty: 2 [TECH: Alan Flint]</p></div> <hr/> <div data-bbox="331 728 630 756"><p>Item: 1GPROC - 1 Ghz Processor, Qty: 2</p></div> <hr/> <div data-bbox="331 777 763 804"><p>Item: 1GPROC - 1 Ghz Processor, Qty: 2 [TECH: Alan Flint]</p></div> <hr/> <div data-bbox="331 825 630 852"><p>Item: 2GPROC - 2 Ghz Processor, Qty: 1</p></div> <hr/> <div data-bbox="331 873 779 900"><p>Item: 2GPROC - 2 Ghz Processor, Qty: 1 [TECH: Alice Martin]</p></div> <hr/> <div data-bbox="331 921 610 949"><p>Item: ALAN, Qty: 1 [TECH: Alan Flint]</p></div> <hr/> <div data-bbox="331 970 626 997"><p>Item: ALICE, Qty: 5 [TECH: Alice Martin]</p></div> <hr/> <div data-bbox="586 1073 810 1115"><p>✍ Customer Signature</p></div> <div data-bbox="586 1161 810 1203"><p>✍ Technician Signature</p></div> <div data-bbox="305 1213 1091 1283"><p>Resolution Contacts Equipment Tasks Time Entries Inventory PO Lines Summary</p></div>

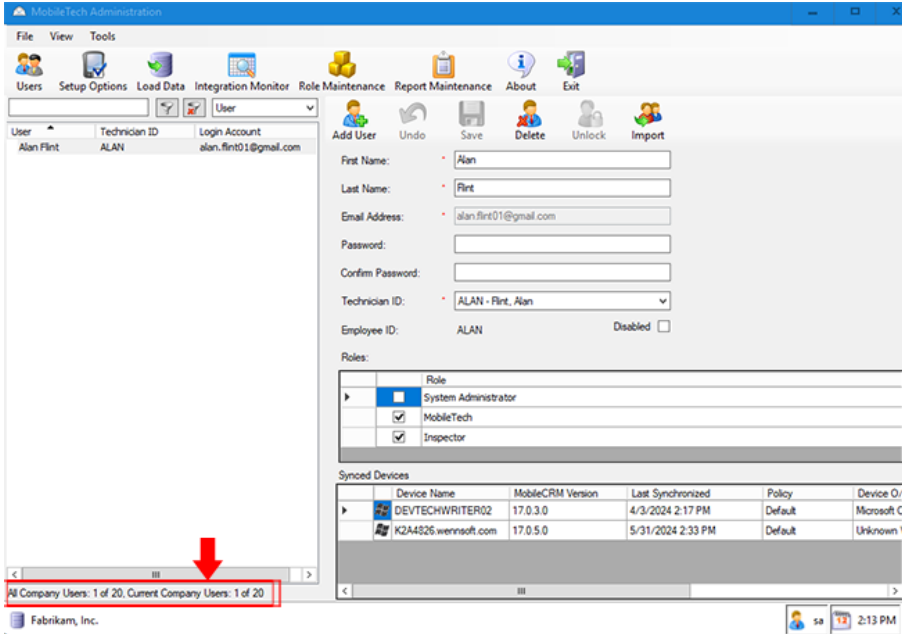
Case #	New Feature																																																
MT-1411	<p>The legacy job safety audit (JSA) report request has been added to the existing UsedEventBasedSync setup option in Mobile Device Global Settings²².</p> <p>For the JSA Report:</p> <ul style="list-style-type: none"> • True: If UseEventBasedSync is set to True, when a technician requests the JSA report, the Sync window opens. If there are pending changes to the Appointment form, the technician is prompted to save or discard the appointment changes before the sync window opens. • False: If this option is set to False, technicians will see the following message "Job Safety Report will be available upon next Sync." <p>When set to True, this setup option prompts technicians to sync their device after a:</p> <ul style="list-style-type: none"> • A service call is created. • An appointment is created or completed. • A timesheet report is requested. • A legacy job safety audit (JSA) report is requested. • A piece of equipment is created. • A payment has been applied to a field invoice. • A purchase order is created. 																																																
MT-1415, MT-1727	<p>You can now define any Summary report (Call Summary, Appointment, or Job Appointment) for a specific customer and/or a customer location. You can also filter to a specific Call Type and/or Division for the Summary report the customer receives. This lets you customize the Summary report for your customer's needs. For example, the type of report they receive, the subject line, and the body of the email. See Set Up Report Email Options²³.</p> <p>Note: You can define a summary report for one or more customers and/or a customer location (each a separate report line) and have a <Default> summary report line for all other customers to receive. For example, you define the Call Summary report for customer 102 and also have the <Default> call summary report. Only customer 102 will get their unique report and all other customers will receive the default Call Summary report.</p> <p>Click to view screenshot.</p>  <table border="1" data-bbox="297 1318 1190 1556"> <thead> <tr> <th>Report Source</th> <th>Appointment Type</th> <th>Call Type</th> <th>Division</th> <th>Customer</th> <th>Location</th> </tr> </thead> <tbody> <tr> <td>Call Summary</td> <td>Service</td> <td>- Blank -</td> <td>- Blank -</td> <td>- Default -</td> <td>- Default -</td> </tr> <tr> <td>Call Summary</td> <td>Service</td> <td>ANNUAL SERVICE</td> <td>SERVICE COM</td> <td>102 - CEDAR FAMILY COUNSELING</td> <td>102 - MAIN OFFICE (CEDAR-15500 CLEV</td> </tr> <tr> <td>Field Invoice</td> <td>Service</td> <td>- Blank -</td> <td>- Blank -</td> <td>- Default -</td> <td>- Default -</td> </tr> <tr> <td>Job Safety Audit</td> <td>Service</td> <td>- Blank -</td> <td>- Blank -</td> <td>- Default -</td> <td>- Default -</td> </tr> <tr> <td>Employee Time Sheet</td> <td><All></td> <td>- Blank -</td> <td>- Blank -</td> <td>- Default -</td> <td>- Default -</td> </tr> <tr> <td>Appointment Summary</td> <td>Service</td> <td>- Blank -</td> <td>- Blank -</td> <td>101 - ACCURATE PRINTING</td> <td>- Default -</td> </tr> <tr> <td>Job Appointment Summary</td> <td>Job Cost</td> <td>- Blank -</td> <td>- Blank -</td> <td>- Default -</td> <td>- Default -</td> </tr> </tbody> </table>	Report Source	Appointment Type	Call Type	Division	Customer	Location	Call Summary	Service	- Blank -	- Blank -	- Default -	- Default -	Call Summary	Service	ANNUAL SERVICE	SERVICE COM	102 - CEDAR FAMILY COUNSELING	102 - MAIN OFFICE (CEDAR-15500 CLEV	Field Invoice	Service	- Blank -	- Blank -	- Default -	- Default -	Job Safety Audit	Service	- Blank -	- Blank -	- Default -	- Default -	Employee Time Sheet	<All>	- Blank -	- Blank -	- Default -	- Default -	Appointment Summary	Service	- Blank -	- Blank -	101 - ACCURATE PRINTING	- Default -	Job Appointment Summary	Job Cost	- Blank -	- Blank -	- Default -	- Default -
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22 <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104793197/Mobile+Device+Global+Settings>

23 <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104793688/Set+Up+Report+Email+Options>

Case #	New Feature
MT-1577	<p>You can now specify to hide site inventories if the item has a negative or zero quantity. We've added a new AllowNegativeSiteQty option to Inventory Settings²⁴. This option defaults to True to remain consistent with existing functionality that shows the negative or zero quantity items. The new setup option is enabled if ShowInventorySiteQtyAvailable is set to True.</p> <ul style="list-style-type: none"> • True: When set to True, users can see and select an item, regardless of the available quantity. • False: When set to False, the item is not displayed if the site inventory has a zero or negative quantity for an item
MT-1562	<p>Starting with the Signature 2024 release, you have the option to store attachments to Azure Cloud Storage (either WennSoft-hosted or self-hosted). Once you've set up Azure Cloud Storage in Signature, your MobileTech attachments will also use Azure Cloud storage. For more information, see the Signature 2024 What's New document.</p> <p>We've added a new read-only DefaultDocumentCategory setup option to MobileTech Global Settings. This setting shows the Default Storage Location selected in Signature 2024's new Document Storage Setup window.</p> <ul style="list-style-type: none"> • Copy File • Attach File • Copy To Database: If your Signature version is earlier than 2024, this option is the default. • Cloud Storage <div data-bbox="298 999 1490 1104" style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p> When a technician updates an attachment that is stored locally and not in the cloud, MobileTech will update the local version and this will not be uploaded to the cloud.</p> </div>

²⁴ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104793495/Inventory+Settings>

Case #	New Feature
<p>MT-1674</p>	<p>We've added the Current Company User count after the All Company User Count at the bottom of the Users list in MobileTech Admin.</p> <p>Click to view screenshot.</p>  <p>The screenshot shows the 'MobileTech Administration' application window. The 'Add User' form is open, with fields for First Name (Alan), Last Name (Flint), Email Address (alan.flint01@gmail.com), Password, Confirm Password, Technician ID (ALAN - Flint, Alan), and Employee ID (ALAN). There are checkboxes for 'Disabled' and 'Inspector' roles. At the bottom of the window, a status bar shows 'All Company Users: 1 of 20. Current Company Users: 1 of 20'. A red arrow points to this status bar.</p>

Resco Inspections

Case #	Description
MT-1168	<p>IMPORTANT: Due to issues with Resco licensing where the Inspection license is assigned to any technician who syncs with a project that has Inspections even if they are not assigned the Inspector Role, you need to have two Woodford projects (one for Inspections, one for non-Inspections). See Import the MobileTech Woodford Project²⁵ for the updated steps for creating a child project and importing the Inspections project.</p> <p>Having the Inspections Woodford project as a "child" project of the Non-Inspection Woodford "parent" project allows you to make changes to the "parent" project and changes are automatically rolled down to the "child" project when you select to "Publish All". You will not have to make customization changes on two Woodford projects.</p> <p>Note that if customizations are made to the "child" project, the link the "parent" project will be broken.</p> <div style="border: 1px solid yellow; padding: 5px; margin-top: 10px;"> <p>⚠ IMPORTANT With this change, technicians must be assigned to either the MobileTech role or Inspector role, but not both roles. The assigned role determines which project the technician syncs their device to.</p> </div>
MT-1174	<p>Resco is deprecating the Auto Dashboard due to a lack of people using it. We've removed the Auto Dashboard from our Manager Woodford project. For more information, see https://docs.resco.net/wiki/Automatic_Dashboard.</p>

²⁵ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104793945/Import+the+MobileTech+Woodford+Project>

Case #	Description
MT-1215	<p data-bbox="293 304 980 336">Additional new features from Resco's Winter 2024 Release²⁶:</p> <ul data-bbox="350 352 1122 1176" style="list-style-type: none"><li data-bbox="350 352 906 793">• Resco mobile platform<ul data-bbox="431 384 906 793" style="list-style-type: none"><li data-bbox="431 384 769 415">• AI-assisted help in Woodford<li data-bbox="431 415 683 447">• Data model explorer<li data-bbox="431 447 906 478">• Migration from Xamarin to .NET platform<li data-bbox="431 478 678 510">• Sync improvements<li data-bbox="431 510 753 541">• Support for new languages<li data-bbox="431 541 824 573">• Bring some color to flexible forms<li data-bbox="431 573 727 604">• Code editor in Woodford<li data-bbox="431 604 691 636">• Not older than X days<li data-bbox="431 636 878 667">• Display options as segmented buttons<li data-bbox="431 667 841 699">• Display multi-dropdown as "chips"<li data-bbox="431 699 911 730">• Storage analyzer: questionnaire statistics<li data-bbox="431 730 776 762">• Save photos to device gallery<li data-bbox="431 762 854 793">• JSBridge: Is the question answered?<li data-bbox="350 793 1122 1014">• Inspections and questionnaires<ul data-bbox="431 825 1122 1014" style="list-style-type: none"><li data-bbox="431 825 1122 856">• Use optical character recognition (OCR) to answer questions<li data-bbox="431 856 737 888">• Export and import wizard<li data-bbox="431 888 704 919">• Questionnaire options<li data-bbox="431 919 1003 951">• Complete questionnaire and open a new instance<li data-bbox="431 951 954 982">• Which answers to copy in repeatable groups?<li data-bbox="431 982 870 1014">• Access style editor from style selector<li data-bbox="350 1014 1078 1176">• Resco Cloud<ul data-bbox="431 1045 1078 1176" style="list-style-type: none"><li data-bbox="431 1045 691 1077">• Web app modernized<li data-bbox="431 1077 1078 1108">• Improved cloning/pulling from connected environments<li data-bbox="431 1108 789 1140">• Custom fonts in server reports<li data-bbox="431 1140 781 1176">• Resco CRM Sync: upload filter <p data-bbox="293 1192 1468 1255">For information including a YouTube demonstration from Resco, please go to https://docs.resco.net/wiki/Releases/Winter_2024.</p>

²⁶ https://docs.resco.net/wiki/Releases/Winter_2024

Case #	Description
MT-1336	<p>Additional new features from Resco's Spring 2024 Release²⁷:</p> <ul style="list-style-type: none"> • Resco mobile platform (Microsoft, Resco Cloud) <ul style="list-style-type: none"> • Geofencing • JSBridge upgrade for web app • Microsoft Store app: switch to WebView2 • OCR in forms • Too much flexibility in the forms • View designer redesigned • View designer: responsive resize • View designer: custom map pin • Woodford: find fields used in the mobile app • Woodford: more clarity into "Project Default" • Newly supported FetchXML operators • Monitor progress when publishing projects • Housekeeping: .NET 8 • Clearer feedback for user actions • (iOS) nicer dropdown lists • Inspections and questionnaires (Microsoft, Resco Cloud) <ul style="list-style-type: none"> • Mark mandatory questions • Support for zero instances for repeatable group • Define score ranges for group results • Questionnaire Designer improvements • Save answers to a different table • Questionnaire integrity check <p>For information including a YouTube demonstration from Resco, please go to https://docs.resco.net/wiki/Releases/Spring_2024.</p>
MT-1410, MT-1543	<p>We've added new steps in the Middle Tier Database Clean Up Job to remove inspection attachments and entities.</p> <ul style="list-style-type: none"> • Inspection attachments: This will only clean up records where the attachment is saved in Signature for a related entity (service call, appointment, job, job appointment, equipment, or customer). • Inspection entities: <ul style="list-style-type: none"> • Removes any related entities for JSA inspections where the created date is older than 14 days. • Removes any orphaned child inspection entities for any inspection, not just JSA inspections. <p>You will need to create a new cleanup job in MobileTech Admin to add these new cleanup steps. For more information, see Create a Cleanup Job for the Middle-Tier Database²⁸.</p>

²⁷ https://docs.resco.net/wiki/Releases/Spring_2024

²⁸ <https://wennsoft.atlassian.net/wiki/spaces/MT2024/pages/104793090/Create+a+Cleanup+Job+for+the+Middle-Tier+Database>