WennSoft

MobileTech

MobileTech 7.5 Installation & Administration Guide

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Introduction

Signature MobileTech provides your field resources with the information they need to perform their job. MobileTech enables technicians who use Windows laptops, or Android and iOS mobile devices to view, capture and share work-related information to and from Signature.

Technicians can receive appointments that are created in the Signature modules, together with appointment details such as estimated hours, description, location, and service call history. Technicians then can update appointments with expense and resolution details.

The information in this guide is intended for administrators and others in your organization who install and set up MobileTech. It also provides information about processing entries and activities in Microsoft Dynamics GP and the Signature modules that are entered and synchronized, or *synced*, by field technicians.

> ⚠ Any references to MobileTech assume that you are installing or have installed the latest version of the components that are available for MobileTech.

For information for technicians, see the Help in MobileTech Client.

Compatible Operating Systems

Refer MobileTech Readme or to the operating systems document found with the MobileTech guidelines on the Product Download page on Signature Resources at https://www.wennsoft.com/wsportal/product-downloads for a list of supported operating systems. We recommend that you perform the appropriate testing prior to any major purchasing decisions, including the procurement of devices.

WennSoft offers compatibility testing if you are interested in making sure that your device and operating system are compatible with MobileTech. Contact WennSoft Support to obtain this service.

Prerequisite Applications

.Net Framework 4.7.1 is required for MobileTech Administration. If you do not already have the .NET application installed on your computer, it will be installed when you install MobileTech.

Other System Requirements

This section outlines basic system requirements for MobileTech 7.5, although the specific system requirements for your installation depend on which versions of Signature and Microsoft Dynamics GP you are using. The system requirements for your version of Signature and Microsoft Dynamics GP also apply to MobileTech.

To find a complete list of system requirements across all the Signature modules, refer to the Signature System Requirements[1].

Do not install MobileTech server components on your SQL Server. Install the MobileTech Administration application on your MobileTech web server.

The following applications may be installed on this server:

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1 https://wennsoft.atlassian.net/wiki/spaces/Signature2018R4/pages/7348578/Signature+System+Requirements

- Signature MobileTech Administration
- Resco Cloud Portal
- Signature MobileTech Integration Sync
- .NET 4.5.2 Full Framework (will be installed automatically if not already installed)

Component	Requirements
SQL Server	Microsoft SQL Server 2017, 2016, or 2014 ⚠ Do not install MobileTech server components on your SQL Server machine. Install MobileTech Administration on the MobileTech web server.
Operating system	• Microsoft Windows Server (Standard or Datacenter Edition): 2016, 2012, 2012 R2 • Windows PowerShell 5.1 or higher
Microsoft SQL Server Reporting Services (SSRS)	Connectivity to the SSRS report server that you use for the Signature modules and Microsoft Dynamics GP is required. Printing reports offline is not currently supported. ⚠ You will need to add the **IIS APPPOOL\RescoCloud** user to the SQL Server Reporting Services Home Folder permissions page. For instructions on adding a user specific to your filtered to your SQL Server version, see https://docs.microsoft.com/en-us/sql/reporting-services/install-windows/reporting-services-configuration-manager-native-mode?view=sqlallproducts-allversions.
Internet Information Services	IIS 7.5 or 8.0
Web Service server	• 2.8 gigahertz (GHz) or higher processing speed • 16 GB available RAM (minimum) • Dual core CPU (minimum) • 20 GB available hard disk space (recommended) • 1 gigabit per second (Gbps) connection speed (recommended) ⚠ Computers that have more than 16 GB of RAM will require more disk space for paging, hibernation, and dump files.
Device communication	• Wireless (Wi-Fi) • Cellular wireless wide area network (WWAN)
Mapping API Key	If you will be using the Mapping feature on a Windows computer, you will need to obtain a Google Maps API key at https://cloud.google.com/maps-platform/pricing/. (Select Dynamic Maps and then select Maps JavaScript API.)

Other Resources

To find a complete list of system requirements across all the Signature modules, please refer to the Signature System Requirements document found on the Product Download page on Signature Resources at https://www.wennsoft.com/wsportal/product-downloads.

- **Signature MobileTech R7.5 Readme**: Describes the features and resolved issues in MobileTech R7.0 and lists compatible software versions.
- **Signature Service Management** and **Signature Equipment Management guides**: Describe how to set up and use Service Management and Equipment Management, and how to process information that is sent from MobileTech to the host system.
- **Signature Reports guide**: Describes how to deploy reports for both Service Management and MobileTech.
- **Resco Mobile CRM Woodford User Guide**: Includes information about how to use Woodford to customize your application.

Installing or Upgrading MobileTech

Use these instructions when installing or upgrading MobileTech. For system requirements information, see the Other System Requirements (page 1).

After you installing the MobileTech components, you will need to set up MobileTech Administration including application options and set up and grant access to users.

You will then install MobileTech Client on the various devices that are used by technicians.

> ⚠️ Before upgrading MobileTech, we recommend that you make a backup copy of the **web.config**, **MobileTechAdmin.exe.config**, and **XrmServer.SyncConsole.exe.config** files if you have made changes to these files. After upgrading you can reinsert your changes.

Install MobileTech Server

If you are upgrading MobileTech, see Upgrade MobileTech Server (page 5).

- Step 1: Install MobileTech Server (page 3)
- Step 2: Install MobileTech Client (page 5)
- Step 3: Install eTimeTrack Web Service (page 5)
- Step 4: Set up MobileTech Admin (page 5)
- Step 5: Import the MobileTech project (page 5)

Step 1: Install MobileTech Server

You can install MobileTech Server on any Microsoft Windows Server environment. See the Signature System Requirements for specific versions. The person who installs the application must be an administrator who has permission to use the server "sa" password.

MobileTech Server installs the following:

- **MobileTech Admin**
  MobileTech is configured by using MobileTech Administration. This application lets you set up users and customize setup options per your organization's business rules and procedures.
- **MobileTech Integration Sync**
  MobileTech Integration Sync applies the settings you enter to the automated sync process. The integration sync process automatically updates the middle-tier database with changes that are made in Signature and Microsoft Dynamics GP. You can change the frequency of the updates later. For more information, see <u>Monitor Processes and Tasks by Using Integration Monitor </u> (page 65). An icon for MobileTech Integration Sync is added to your desktop. You can choose the icon at any time after you set up MobileTech if you want to manually run the sync process.
- **Resco Cloud**
  Resco Cloud a cross-platform mobile solution with advanced configuration capabilities . Resco Cloud includes the Offline HTML version of Woodford, which is a tool that lets you customize and configure MobileTech for your business purposes. You will need to <u>importing the MobileTech Woodford project</u> (page 39). We refer to this as Woodford in the rest of our documentation.

To install the MobileTech Server:

1. Right-click on the *Signature MobileTech Server x-x-xx.exe* file.
2. Click **Run as administrator**.
3. In the Welcome window, click *Next*.
4. On the End-User License Agreement page, read and accept the terms of the license agreement and choose *Next*.
5. On the SQL Server Settings window, enter the following information:
   - **Dynamics GP System Database**
     Enter the name of the database where Microsoft Dynamics GP is stored. *Dynamics* defaults into this field but you can change this if your database name is different.
   - **SQL Server**
     Enter the SQL Server name and instance where the Microsoft Dynamics GP database is installed.
   - **SA Password**
     Enter the SQL system administrator password.
6. Select *Next*. The ODBC runs a connection test.
7. On the MobileTech User Details window:
   - **MobileTech User**
     Displays *mobiletech*, which you cannot change.
   - **Password**
     If a SQL Server account exists for the *mobiletech* user, enter the *mobiletech* account password so it can be validated. If a SQL Server account does not exist, you are prompted to confirm the password.
8. Select *Next*.
9. On the Sync Server Details and Registration Web Service Details window, enter the Sync Server Details:
   - **Sync Server URL**
     Enter the Sync Server URL address. *http://servername:8888*
   - **MobileTech Admin User email address**
     This is the email address that you will use to log into Woodford.
10. Mark the check box if the Signature Registration web service is installed on a secure website (https:// instead of http://). This allows the registration web service to be consumed over Secure Sockets Layer (SSL).
11. Click *Next*.
12. On the Email and Scheduled Task Details window, enter the following:
    - **Error Report Email Address**
      Enter the email address where error reports are sent.
    - **Scheduled Task Frequency**
      Enter a number, in minutes, to indicate how frequently the integration sync process updates the middle-tier database with changes that were made in Microsoft Dynamics GP. This defaults to 15 minutes.
13. Select *Next*.

14. On the Select Installation Folder window, select *Browse* to choose the location where MobileTech Server will be installed, or accept the default location C:\Program Files (x86)\Signature\MobileTech\.
15. Select *Next*.
16. On the Installing Signature MobileTech Server page, select *Install*.
17. The Administrator: Windows PowerShell command window opens to run a Resco script.

> ⚠ This script may take approximately 5 minutes to run. When everything is done installing, you will see "Press any key to continue.." as the final line.

18. Press any key to close the command window.
19. On the Signature MobileTech Server Setup window select *Finish*.

Step 2: Install MobileTech Client

To install the MobileTech Client on a computer, see Install the MobileTech Client (page 8).

Step 3: Install eTimeTrack Web Service

To install eTimeTrack Web Service, see Install eTimeTrack Web Service (page 9).

Step 4: Set up MobileTech Admin

After completing the installation steps, you will need to review the Setting up MobileTech (page 11) section. You then set up MobileTech and install MobileTech Client on client devices from their respective app store. You must do this for each company. If you are not prompted to install database objects, go to *Tools > Create MobileTech Objects* and choose *Process*.

See Set up MobileTech Administration (page 14).

> ⚠ In MobileTech, there is one middle-tier database for each Microsoft Dynamics GP company. The naming convention for the database name is companyname_RESCOXRM. The configuration database is called RESCOXRM_CONFIG.

Step 5: Import the MobileTech project

See Import the MobileTech Woodford Project (page 39).

Step 6: Complete additional setup

Review the Setting up MobileTech (page 11) section.

Upgrade MobileTech Server

Regardless of which version you are upgrading from, be sure to install the components for the most recent version. After you install MobileTech Server, you must set up application options and set up and grant access to users by using MobileTech Administration. You will then install MobileTech Client on the various devices that are used by technicians.

Upgrading MobileTech involves making a backup config files (optional), uninstalling your current MobileTech, and then installing the latest version of MobileTech Server and Client.

After the upgrade is complete, you can use MobileTech Administration to select application options and set up and grant access to users.

> ⬤ **Important upgrade information**
>
> Do not install a version of Woodford that is newer than 12.X.
> Do not install a newer version of Woodford until you are instructed to do so by WennSoft. Woodford is a third-party product and you must use a version of Woodford that is compatible with the version of MobileTech you are using.
> When you launch Woodford, if the "New update is available" message displays, choose Later.
> After you install and activate Woodford, we recommend that you set up Woodford so you are not prompted to install a newer version when it is released by Resco. In Woodford, choose **Settings** and unmark the **Check for updates** on startup checkbox.
> Review the steps below carefully before you install the latest compatible version of Woodford.

- <u>Step 1: Making backups of .config files</u>
- <u>Step 2: Uninstall your current MobileTech installations</u>
- <u>Step 3: Install MobileTech Server</u>
- <u>Step 4: Install MobileTech Client</u>
- <u>Step 5: Set up MobileTech Admin</u>
- <u>Step 6: Import the MobileTech Woodford project</u>

Step 1: Making backups of .config files

Before upgrading MobileTech, we recommend that you make a backup copy of the **web.config**, **MobileTechAdmin.exe.config**, and **XrmServer.SyncConsole.exe.config** files if you have made changes to these files. After upgrading you can reinsert your changes.

Step 2: Uninstall your current MobileTech installations

Prior to upgrading to MobileTech 7.5, you will need to uninstall MobileTech from your Windows server/workstations:

- Signature MobileTech Integration Sync
- Signature MobileTech Sync Server
- Signature MobileTech Admin
- Signature MobileTech Client

Step 3: Install MobileTech Server

You can install MobileTech Server on any Microsoft Windows Server environment. See the Signature System Requirements for specific versions. The person who installs the application must be an administrator who has permission to use the server "sa" password.

MobileTech Server installs the following:

- **MobileTech Admin**
  MobileTech is configured by using MobileTech Administration. This application lets you set up users and customize setup options per your organization's business rules and procedures.
- **MobileTech Integration Sync**
  MobileTech Integration Sync applies the settings you enter to the automated sync process. The integration sync process automatically updates the middle-tier database with changes that are made in Signature and Microsoft Dynamics GP. You can change the frequency of the updates later. For more information, see <u>Monitor Processes and Tasks by Using Integration Monitor _(page 65)</u>. An icon for MobileTech Integration Sync is added to your desktop. You can choose the icon at any time after you set up MobileTech if you want to manually run the sync process.
- **Resco Cloud**
  Resco Cloud a cross-platform mobile solution with advanced configuration capabilities . Resco Cloud includes the Offline HTML version of Woodford, which is a tool that lets you customize and configure MobileTech for your business purposes. You will need to <u>importing the MobileTech Woodford project _(page 39)</u>. We refer to this as Woodford in the rest of our documentation.

To install the MobileTech Server:

1. Right-click on the *Signature MobileTech Server x-x-xx.exe* file.
2. Click **Run as administrator**.
3. In the Welcome window, click *Next*.
4. On the End-User License Agreement page, read and accept the terms of the license agreement and choose *Next*.
5. On the SQL Server Settings window, enter the following information:
   - **Dynamics GP System Database**
     Enter the name of the database where Microsoft Dynamics GP is stored. *Dynamics* defaults into this field but you can change this if your database name is different.
   - **SQL Server**
     Enter the SQL Server name and instance where the Microsoft Dynamics GP database is installed.
   - **SA Password**
     Enter the SQL system administrator password.
6. Select *Next*. The ODBC runs a connection test.
7. On the MobileTech User Details window:
   - **MobileTech User**
     Displays *mobiletech*, which you cannot change.
   - **Password**
     If a SQL Server account exists for the *mobiletech* user, enter the *mobiletech* account password so it can be validated. If a SQL Server account does not exist, you are prompted to confirm the password.
8. Select *Next*.
9. On the Sync Server Details and Registration Web Service Details window, enter the Sync Server Details:
   - **Sync Server URL**
     Enter the Sync Server URL address. *http://servername:8888*
   - **MobileTech Admin User email address**
     This is the email address that you will use to log into Woodford.
10. Mark the check box if the Signature Registration web service is installed on a secure website (https:// instead of http://). This allows the registration web service to be consumed over Secure Sockets Layer (SSL).
11. Click *Next*.
12. On the Email and Scheduled Task Details window, enter the following:
    - **Error Report Email Address**
      Enter the email address where error reports are sent.
    - **Scheduled Task Frequency**
      Enter a number, in minutes, to indicate how frequently the integration sync process updates the middle-tier database with changes that were made in Microsoft Dynamics GP. This defaults to 15 minutes.
13. Select *Next*.

14. On the Select Installation Folder window, select *Browse* to choose the location where MobileTech Server will be installed, or accept the default location C:\Program Files (x86)\Signature\MobileTech\.
15. Select *Next*.
16. On the Installing Signature MobileTech Server page, select *Install*.
17. The Administrator: Windows PowerShell command window opens to run a Resco script.

> ⚠ This script may take approximately 5 minutes to run. When everything is done installing, you will see "Press any key to continue.." as the final line.

18. Press any key to close the command window.
19. On the Signature MobileTech Server Setup window select *Finish*.

Step 4: Install MobileTech Client

To install the MobileTech Client on a computer, see Install the MobileTech Client (page 8).

Step 5: Set up MobileTech Admin

After completing the installation steps, you will need to review the Setting up MobileTech (page 11) section. You then set up MobileTech and install MobileTech Client on client devices from their respective app store.

The first time you log into MobileTech Admin after upgrading, you will be prompted to upgrade the Resco middle-tier databases. After this has completed, you will be prompted to install database objects. You must do this for each company. If you are not prompted to install database objects, go to *Tools > Create MobileTech Objects* and choose *Process*.

See Set up MobileTech Administration (page 14).

> ⚠ In MobileTech, there is one middle-tier database for each Microsoft Dynamics GP company. The naming convention for the database name is companyname_RESCOXRM. The configuration database is called RESCOXRM_CONFIG.

Step 6: Import the MobileTech Woodford project

See Import the MobileTech Woodford Project (page 39).

Install the MobileTech Client

These instructions are for installing MobileTech Client on your Windows PC.

1. Right-click on the *Signature MobileTech Client x-x-xx.exe* file.
2. Select **Run as Administrator**.
3. In the Welcome window, select *Next*.
4. Accept the License Agreement and select *Next*.
5. Accept the default installation location or navigate to where you would like to install MobileTech Client. This defaults to C:\Program Files (x86)\Signature\MobileTech\Client\.
6. Click *Next*.
7. Select *Install*.
8. Click *Finish*.

> ⬤ **UPDATING ON iOS DEVICES**
> If your technicians use iOS devices, the technicians will sometimes be notified about MobileTech app updates for their devices. **Do not install the client updates on those devices unless you will also be updating the MobileTech Server to the compatible versions that are listed in the Readme**. We recommend that you clearly communicate this information to your technicians.
> We also recommend that you turn off automatic downloads of updates on iOS devices. To do this, go to *Settings > iTunes & App Store*. In the **Automatic Downloads** section, make sure the **Updates** option is turned off (the toggle switch should appear gray, not green). Repeat this task on each iOS device.
> You can view which version of MobileTech is installed on each device. For more information, see <u>View User Device Information and Sync Activity (page 65)</u>.

Install eTimeTrack Web Service

The eTimeTrack Web Service application is included with the installation package for MobileTech.

> ⚠ In the current release, extended pricing is not supported for expense and travel transactions through Time Entry.

1. Double-click **eTimeTrackWebServiceSetup.exe**.
2. On the Welcome to the Signature eTimeTrack Web Service Setup Wizard page, choose *Next*.
3. On the End-User License Agreement page, read and accept the terms of the license agreement, and then choose *Next*. The Select Installation Folder page is displayed.
4. Accept the default installation location, or choose *Browse* to select the location where the eTimeTrack Web Service should be installed.
5. Choose *Next*. The SQL Database page is displayed.
6. Enter the SQL server and instance for the eTimeTrack Web Service (server name\instance).

   > ⚠ The default user name is displayed and you cannot change it.

7. Enter a password for the user and choose *Next*. The Web Service User Configuration page is displayed.

   > ⚠ The default user name is displayed and you cannot change it.

8. Enter a password for the user.
9. In the **Database** field, enter the database name for your company. If you are installing MobileTech on multiple databases, enter each database name, separated by commas.
10. Choose *Next*. The Ready to Install page is displayed.
11. Choose *Install*. The status bar shows the progress of the Signature eTimeTrack Web Service Setup Wizard.
12. When the installation is complete, the Completing the Signature eTimeTrack Web Service Setup Wizard page is displayed. Choose *Finish*.
13. Continue with the information in <u>Setting up MobileTech (page 11)</u>.

Install the Quadra Field Quoting Integration (optional)

The MobileTech/Quadra integration allows field technicians to generate Quadra recommendations directly from the MobileTech appointment completion process. Technicians can then view that recommendation from within ERTH's Quadra mobile application and turn that into field quotes and future service call work in Signature/MobileTech. For more information about Quadra Field Quoting application, see <u>https://www.erthcorp.com/quadra-field-quoting-new/</u>.

Use the steps below to install the Quadra Field Quoting integration with MobileTech.

Running the configuration script

1. Locate the **Create Quadra Objects.sql** file found at C:\Program Files (x86)\Signature\MobileTech\Admin\Scripts\Integrations.
2. Open Microsoft SQL Server Management Studio (SSMS).
3. In Microsoft SSMS, open the **Create Quadra Options.sql** script file and complete the following steps:
    a. Replace the **{company-db}** text with your company database name such as TWO. e.g. USE [{company-db}] --> USE [TWO].
    b. Replace the **{orgname}** text (3 occurrences) with the actual company database name. e.g. {orgname} _RESCOXRM --> two_RESCOXRM.
    c. Replace the **{quadra-db}** text (2 occurrences) with the actual Quadra database name. e.g. {quadra-db}..mfq_recommendationTemplates --> QUADRA..mfq_recommendationTemplates.
    d. Set the @QuadraAPIKey variable that was issued by ERTH.
4. *Execute* the **Create Quadra Options.sql** script.

Enable the Legacy SEE Integration with MobileTech 7.5 (optional)

Complete the following steps to enable the legacy SEE (XOeye) integration with MobileTech 7.5. The legacy version refers to the original XOeye integration that was introduced in MobileTech 5.5. The newer workflow integration was introduced in MobileTech 6.0, with users able to use either integration method. Beginning with Mobile 7.5, the workflow integration method is the default method. The legacy SEE integration will be deprecated in MobileTech 8.0.

For additional SEE settings, go to .

Create folders and files in Woodford

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The files needed for this section of instructions are found in the product download.

1. In Woodford, open the MobileTech project and navigate to the Offline HTML folder and open the **features** folder.
2. At the same level as the **SEE Workflow** folder, create a new folder and name this *XOEye*.
3. Open the **XOEye** folder and create a new folder and name this *css*.
4. Open the **css** folder.
5. Upload the *styles.css* file.
6. Navigate up one level (to \features\XOEye).
7. Upload the *index.html* and *xoeye.js* files.
8. Navigate to the **\scripts** folder.
9. Upload the *jquery-1.7.1.min.js* file.
10. Click the *Save* button in the top toolbar
11. In the entity list, select the **Appointment Completion** entity.
12. Open the **Default** form and click *Add IFrame* in the top toolbar menu
13. Type *SEE* in the **Name** field
14. Paste the following uri into the Url field:
    file://features/XOEye/index.html?gpservicecallid={gpservicecallid}&gpappointmentid={gpappointmentid}&appointmentid={id}
15. Click *OK*.
16. Click *Save & Close*.
17. Click *Publish*.

Enable UseXOEye setting in MobileTech Admin

1. In MobileTech Administration, select *Setup Options*.
2. Scroll down to **2SEE Settings**.
3. Set **UseXOEye** to *True*.
4. Select *Save*.

Connect to XOi account on a device

1. In the MobileTech app on a device, choose **Setup**.
2. In the **ACCOUNTS** section, select *Connect* to the right of **XOi**.
3. Login with your XOi assigned email and password.

Setting up MobileTech

MobileTech is configured by using MobileTech Administration. This application lets you set up users and customize setup options per your organization's business rules and procedures.

You need to set up MobileTech for each company by completing the procedures that follow.

If you previously installed an earlier version of MobileTech and you are now installing MobileTech R7.5, you will be prompted to update the middle-tier database, and you must run the Create Database Objects tool for each company immediately after you install MobileTech Administration. To manually create database objects, In MobileTech Administration, go to *Tools > Create MobileTech Objects*, and then choose *Process*.

> ⚠ Any reference to MobileTech assumes that you are installing or have installed the latest version of the components that are available for MobileTech.

Set up Distributed Transaction Coordinator (DTC)

Use the Local DTC Properties window to set up the properties for Microsoft Distributed Transaction Coordinator (DTC) on these computers:

- The server where SQL Server is running for MobileTech.
- The computer where MobileTech Server is installed.

This helps make sure that transactions between the host computer and client devices are successfully completed and synced.

1. From the Start menu, choose *Administrative Tools > Component Services*. The Component Services window is displayed.
2. Double-click the **Computers** folder, double-click **My Computer**, and then double-click **Distributed Transaction Coordinator**.
3. Right-click **Local DTC** and choose **Properties**. The Local DTC Properties window is displayed.
4. Choose the **Security** tab.
5. Under Security Settings, mark:
   - **Network DTC Access**
   - **Allow Remote Clients**
   - **Allow Remote Administration**

6. Under Transaction Manager Communication, mark:
    - **Allow Inbound**
    - **Allow Outbound**
    - **No Authentication Required**
7. The DTC logon account is displayed in the **Account** field. Accept the default account location, or choose *Browse* to select a different location. For more information about the options in this window, choose the **Learn more about setting these properties** link at the bottom of the window.
8. Choose *OK*.
9. In the Component Services window, in the left pane, choose **Services**.
10. In the Services list, double-click **Distributed Transaction Coordinator**. The Distributed Transaction Coordinator Properties (Local Computer) window is displayed.
11. On the **General** tab, verify that the **Startup type** field is set to **Automatic** or **Automatic (Delayed Start)**.
12. Choose *OK*.

Set up Password Complexity and Lockout Policy

Setting up password complexity

You can set up minimum complexity requirements for MobileTech passwords, such as requiring digits, upper case letters, special characters, and password length in the C:\Program Files (x86)\Signature\MobileTech\RescoCloud**Web.config** and C:\Program Files (x86)\Signature\MobileTech\Admin**MobileTechAdmin.exe.config** files using a regex (regular expression) check.

```
<add key="PasswordPolicyStrengthRegex" value="" />
```

> ⚠ User password strength regex check (empty allows any password). This value defaults empty.

Example:

The settings in the sample below are explained. You are not limited to these settings.

```
add key="PasswordPolicyStrengthRegex" value="^(?=.[0-9])(?=.[A-Z])(?=.[!@#$&]).
{8,}$"
```

(?=.[0-9])**{***}	Indicates at least one digit.
(?=.[A-Z])*	Indicates at least one upper case letter.
(?=.[!@#$&**]**)	Indicates at least one special character.
{8,}	- Indicates a minimum of 8 characters in length

Setting up the password lockout policy

Set up your password lockout policy to indicate a lockout mode (Lockout or Disable), after x failed login attempts, as well as how many minutes a user's account is locked. These setup options are in the **Web.config file**. The Password Policy Lockout Attempts setting will also need to be set in the **MobileTechAdmin.exe.config** file.

> ⚠ If you choose to not set up a password lockout policy, set **PasswordPolicyLockoutAttempts** to either 0 or "" as this allows an infinite number of invalid login attempts.

- **Password Policy Lockout Mode**
  This setting has two possible values – *Lockout* and *Disable*. This setting works in conjunction with the PasswordLockoutAttempts setting. The default value is Lockout.

  ```
  <add key="PasswordPolicyLockoutMode" value="Lockout" />
  ```

  - **Lockout**
    When the setting is set to **Lockout** and the Lockout Attempts value is hit, the account will be locked out until the PasswordLockoutDuration value has been reached. This value is in minutes. The system administrator can unlock the user in the user profile.
  - **Disabled**
    When the setting is set to **Disable** and the Lockout Attempts value is hit, the system administrator will need to enable the user in the user profile.
- **Password Policy Lockout Attempts**
  Sets the number of invalid logon attempts that are allowed before an account is locked out. The default value is 3.

  ```
  <add key="PasswordPolicyLockoutAttempts" value="3" />
  ```

  > ⚠ The **Password Lockout Attempts** setting needs to be set up in both the Web.config and MobileTechAdmin.exe.config files.

- **Password Policy Lockout Duration** - Sets the length of time (minutes) the account is locked. The default value is 10 minutes. This setting is used in conjunction with the *Lockout* mode.

  ```
  <add key="PasswordPolicyLockoutDuration" value="10" />
  ```

Optional: Increase the Maximum Size of the MobileTech Event Log

When transaction information is transmitted between devices and the host system, any events that occur are recorded in the MobileTech event log in Windows Event Viewer. This log can fill up quickly, so you might want to increase the maximum size of the event log so you do not lose log history.

The default maximum size of the event log is 4,096 KB. Depending on the amount of history you want to keep, you might want to double (8,192 KB), triple (12,288 KB), or quadruple (16,384 KB) the maximum size of the event log.

1. Choose *Start > Administrative Tools > Event Viewer*. The Event Viewer window is displayed.
2. In the navigation pane, expand **Applications and Services Logs**.
3. Right-click the **MobileTech** log and choose **Properties**. The Log Properties – MobileTech window is displayed.
4. In the **Maximum log size (KB)** field, enter a new maximum file size, such as 8192, 12288, or 16384.
5. Choose *OK*.

Set up MobileTech Administration

The user who logs on to MobileTech Administration must be a member of the DYNGRP SQL Server role for each company database and for the DYNAMICS (your database may have a different name) database. To install database objects or create the middle-tier database, you must log on with the SQL Server "sa" account.

When you create a middle-tier database in MobileTech, a daily cleanup job is automatically set up for the database. For more information about this job or how to specify when it runs, see Create a cleanup job for the middle-tier database (page 15).

Any time you log on to MobileTech Administration and the version number of MobileTech Administration is higher than the last time you logged on for a company, the page to install database objects opens. You must install database objects for each company.

If you are not prompted to install database objects, go to *Tools > Create MobileTech Objects*, and then choose *Process*.

1. From the Start menu, open **MobileTech Admin**.
2. On the MobileTech Administration Login page, enter information in these fields to connect to the MobileTech database.
    - **Server Name**
      Enter the SQL Server name and instance where the Signature modules are installed. Example: server\instance.
    - **Authentication**
      Choose the authentication mode. You must have a valid SQL Server logon set up.
        - **Windows Authentication**
          Use your Windows user credentials to log on.
        - **SQL Server Authentication**
          Use your SQL Server credentials to log on.
    - **Login**
      Enter the name for the system administrator (sa).
    - **Password**
      Enter the password for the system administrator.
3. Choose *Connect*.
4. If multiple companies are installed, the MobileTech Administration Login page is displayed again. In the **Company** field, select a company and choose *Connect*. The active company is displayed at the bottom left of the MobileTech Administration page.
5. Enter the email address, password, and the other information for the administrator, and then choose *Create/Update*.
6. The following options may need to be updated, which you will be prompted for:
    - Organization database
    - Resco middle-tier database(s)
    - Database objects

    > ⚠ If you are not prompted to install database objects after you log on, choose *Tools > Create MobileTech Objects*. You must install database objects for each company.

7. Choose *Process*.
8. Continue setting up MobileTech.

To switch companies, choose *File > Change Company*. Select a company, and then choose *OK*.

Create a cleanup job for the middle-tier database

Occasionally, when a service call is created in the host system but completed on a mobile device, records that are related to that service call do not get removed from the middle-tier database when the service call is completed.

To make sure these records are cleared out of the middle-tier database, you should set up the daily cleanup job. This job looks in the middle-tier database for records related to service calls that were closed or completed more than 14 days ago, and for task attachments that have no parent service call. Those records are removed from the middle-tier database during the next integration sync.

> ⚠ If more than 450 service calls are completed per day, we recommend that you work with WennSoft Support.

This job is automatically set up when you create a new middle-tier database in Signature MobileTech R7.0. However, if you are upgrading to Signature MobileTech R7.5 from a release prior to MobileTech R4.0 SP1, you need to manually create this cleanup job in MobileTech Administration.
When you create the cleanup job, it is automatically set up to run every four hours each day. To change the frequency or specify the time, change the schedule for the SQL Server Agent job. For more information, see the Microsoft SQL Server documentation.

1. In MobileTech Administration, choose *Tools > Create Middle Tier Database Clean Up Job*. The Create Cleanup Job page is displayed.

   > ⚠ You must be a member of the SQL Server SysAdmin role to open this page.

2. Choose *Close* after the cleanup job is created.

Set up MobileTech Options

Use this information to choose settings that control how MobileTech is used. Settings that are not available are read-only.

1. In MobileTech Administration, choose *Setup Options*. The setup options page is displayed.
2. Select a setting to view its description at the bottom of the page, or refer to the tables that follow for information about how to configure the settings for your organization.
   - MobileTech Global Settings (page 16)
   - MobileTech Company-Specific Settings (page 16)
   - Report Settings (page 17)
   - Mobile Device Global Settings (page 18)
   - Time Log Settings (page 21)
   - Field Invoicing and Field Payment Settings (page 22)
   - Job Safety Tasks (page 23)
   - Equipment Settings (page 24)
   - Task Settings (page 25)
   - Purchase Order Settings (page 25)
   - Resolution Settings (page 27)
   - Labor Settings (page 27)
   - Travel Settings (page 28)
   - Expense Settings (page 29)
   - Inventory Settings (page 30)
   - Signature Settings (page 31)
   - 2SEE Settings (page 32)

MobileTech Global Settings

Setting	Description
DataSource	The SQL Server name and instance that was specified during logon. This value cannot be changed.
Username	The user who logged on to MobileTech Administration to communicate with the SQL Server database. This value cannot be changed.
TimeTrackProxyUrl	The URL of the default TimeTrack Web Service. This value is configured during setup and should not be changed unless the TimeTrack Web Service is moved to a new server.
LogVerbose	Determines whether all possible events are logged to the event log. The default value is **False**.If **True**, all possible events are logged to the event log, and the event log fills much more quickly. You might want to set this to **True** only for troubleshooting purposes.
LogSql	Determines whether all T-SQL statements are logged to the event log. The default value is **False**.

MobileTech Company-Specific Settings

Setting	Description
AdminEmailAddress	The administrative email account where log files and error logs are sent. This email address was entered during the installation of MobileTech Server.
HistoryCount	The number of historical equipment and service records to display on the client device when the technician requests service history. The default value is **3**.
IncludeMCCWithHistory	Determines whether maintenance computer-generated calls (MCC) are included when service and equipment history is requested. The default value is **True**.
CurrencyDecimalPlaces	The number of decimal places that are used to process currency amounts on the device. This value comes from Microsoft Dynamics GP and cannot be changed.

Report Settings

Setting	Description
ReportEmailMode	Determines how to handle automated emails of reports and other documents, such as invoices. Reports are always sent to the email account that is specified for a technician when the technician is added to MobileTech *(MobileTech Administration > Users)*. ⚠ Each technician's email address is also their logon account, and that is the email address that is used to send reports to the technician. • **Do not send report emails** - The report is sent only to the specified email account for the technician. The technician can then decide whether to forward the report to others, and to whom. This is the default value and should be used if reports should never be sent directly to a customer or another third-party contact. • **Signature Contact Management** - Send an email to the technician, and to the contact or contact list that is set up in Contact Management and that is associated with the location of the service call. • **GP Internet Addresses** - Send an email to the technician who is set up in the Internet Information window in Microsoft Dynamics GP *(Microsoft Dynamics GP > Tools > Setup > Company > Internet Information)* and who is associated with the location of the service call. Only one contact is allowed for this value. • **Selected or entered by technician** - The technician can select one or more email addresses to send reports or other documents, such as invoices, to appropriate personnel in the organization. The technician can also enter email addresses for new contacts and customers to send documents to them. This value applies only to external reports and documents, such as field invoices and the Call Summary report. ⚠ The **Select or entered by technician** option allows technicians the ability to add a contact on-the-fly.
ReportEmailSMTPServer	The name of the machine where the email server resides.
ReportEmailSMTPServerPort	The port that is used by the email server. The default port number is **25**, but you can change it for your system.
ReportEmailSMTPEnableSSL	Determines whether SSL is used by the email server. The default value is **False**.

Setting	Description
ReportExecutionUrl	The URL for the Report Execution web service. This URL is used by the system to communicate with the SSRS report server to generate the Call Summary report. ⚠ To locate the URL, open Reporting Services Configuration Manager, and then open the *Web Service URL* section. Use the value from the **URLs** field, followed by /ReportExecution2005.asmx. Example: http://\\{servername}/ReportServer/ReportExecution2005.asmx
UseSMTPAuthentication	Determines whether a user name and password are required for sending email. The default value is **True**.
SMTPUsername	The user name that is used to send report email notifications. This is available – and required – if **UseSMTPAuthentication** = **True**.
SMTPPassword	The password that is used to send report email notifications. This is available – and required – if **UseSMTPAuthentication** = **True**.
ReportPreviewMaxRetryAttempts	The number of times that the client attempts to retrieve the preview of a field invoice after it is requested. The default number of attempts is **30**.This setting applies to field invoicing and is available only if Field Invoicing and Field Payments is registered, and **UseFieldInvoicing** = **True** in the *Field Invoicing and Field Payments Settings* area.
ReportPreviewRetryInterval	The number of seconds between when the client tries to retrieve the preview of a field invoice until the maximum number of attempts has been met or the preview invoice is generated. The default number of seconds is **30**.This setting applies to field invoicing and is available only if Field Invoicing and Field Payments is registered, and **UseFieldInvoicing** = **True** in the *Field Invoicing and Field Payments Settings* area.

Mobile Device Global Settings

Setting	Description
AutoStatusUpdate	The default status for appointments that are received by the device. The default value is blank, which means no status is assigned to the appointments. If a status is selected for both this setting and **JobSafetyStartStatus** in Job Safety Tasks (page 23), we recommend that you do not use the same status for both. ⚠ *AutoStatusUpdate* and *TimeLogStatusUpdate* in Time Log Settings (page 21) cannot have the same value.

Setting	Description
DefaultWeekday	The default week-ending day for time entries, which is based on the TimeTrack settings in the Microsoft Dynamics GP database. This value cannot be changed.
UseAdditionalWork	Determines whether technicians can enter additional work on a service call. The default value is **True**. If **False**, technicians cannot enter new additional work in the **Additional Work** pane.
UseBarcoding	Determines whether the organization uses barcoding functionality in MobileTech. If **True**, barcoding is used. If **False**, barcoding is not used. The default value is **False**.
UseServerMode	Determines whether technicians can utilize SERVER MODE with all Offline HTML pages. Server Mode allows users to access customer, location, and equipment data via the Middle Tier database (utilizing mobile data). If **False**, users will only access customer data on their devices, not from the Middle Tier. The default value is **True**. See Set the Fetch Limit (page 44) for information on setting the number of Customer Location (customers and locations) or Equipment records that the SERVER MODE fetches at a time in the New Service Call window in the MobileTech Client.
UseServiceCallUserDefine2	Indicates whether the **Service Call User Defined 2** field is a validated lookup, based on the Service Management settings in Microsoft Dynamics GP. This value cannot be changed.
UseWorkCrewJobCost	Determines whether technicians can enter billed labor, travel, and expense transactions for a Job Cost work crew that includes any Microsoft Dynamics GP user who has valid hourly or business expense type pay codes. The default value is **True**.
UseWorkCrewService	Determines whether technicians can enter labor, travel, or expense transactions for service work crews or individual work crew members when a service appointment is completed. The default value is **False**.
UseTechnicianHelper	Determines whether technicians can enter labor and expense transactions for another technician. The default value is **False**. If **True**, technicians also can change the technician on the transaction.
UseChangeOrder	Determines whether technicians can enter and review change orders that affect job costs. The default value is **True**.
CustomerNotesReadOnly	Determines whether technicians can edit customer notes. The default value is **True**.

Setting	Description
LocationNotesReadOnly	Determines whether technicians can edit location notes. The default value is **True**.
EquipmentNotesReadOnly	Determines whether technicians can edit equipment notes. The default value is **True**.
ServiceCallNotesReadOnly	Determines whether technicians can edit service call notes. The default value is **True**.
AppointmentNotesReadOnly	Determines whether technicians can edit appointment notes. The default value is **True**.
ContractNotesReadOnly	Determines whether technicians can edit contract notes. The default value is **True**.
DefaultNewNotesAsInternal	Determines whether the default setting for new notes that are created by technicians is **Internal**, which means the notes are not displayed on the Call Summary report. The default value is **False**. Technicians can change this setting per note when they create notes.
UseAppointmentNotesSummary	Determines whether note links are displayed at the bottom of the **Appointment** pane when technicians view the details for a service call appointment. If **True**, the links are displayed, so technicians can easily view the notes from one location. The default value is **False**.
UseEventBasedSync	Determines whether event-based syncing is used on all devices. If **True**, event-based syncing is used to sync to the host system after a service call is created, an appointment is created or completed, a timesheet report is requested, or a payment has been applied to a field invoice. If **False**, event-based syncing is not used. The default value is **True**.If **Sync Login** is marked on the Setup page on the device, the Sync page will be displayed and the user must choose **Sync**. For more information, see "Event-based syncing" in the MobileTech Help.
UseMobileAuditBackgroundSync	Used to control the ability to auto-upload mobileaudit records to the host. This is used with Woodford's Auditing feature to track technician GPS coordinates based on creating or updating specific entities such as Appointment, TimeLog, or TimeEntry. The default value is **False**. See Enable Mobile Auditing (page 43) for setting up Woodford's Auditing feature.
OnSiteStatusUpdate	Used when UseMobileAuditBackgroundSync=True to determine what status will be used to automatically send the technician's GPS coordinates to the host. No synchronization is required, but an internet connection must be available. See Enable Mobile Auditing (page 43) for more information.

Time Log Settings

Setting	Description
UseTimeLog	Determines whether technicians can clock in and out from the client device and have billable labor hours calculated automatically by the system. Unbillable hours for technicians also are calculated by the system. Users also can see which appointments they are timed in to, and the **Time In** and **Time Out** values are displayed in the Appointment Summary Preview and Job Summary Preview panes and on the Call Summary and Appointment Summary reports. The default value is **False**. If **False**, the next four settings are not available.
TimeLogLockTimeInTimeOut	Determines whether the **Time In** and **Time Out** fields on the client device are locked. The default value is **True**.If **True**, hours go directly to appointment history. If **False**, technicians can manually adjust the time.You can change this value only if **UseTimeLog** = **True**.
TimeLogLockLaborTime	Determines whether the **Labor Time** field on the client device is locked. The default value is **True**.If **False**, technicians can manually adjust the labor hours that are calculated based on their time in and time out.You can change this value only if **UseTimeLog** = **True**.
TimeLogAllowTimeOverlap	Determines whether technicians can time in to multiple appointments at the same time. The default value is **False**, so time-in and time-out entries cannot overlap.You can change this value only if **UseTimeLog** = **True**. ⚠ If you are upgrading from an earlier version of MobileTech, this setting may have been set to **True** and could not be changed. If so, the setting remains set to **True** after the upgrade, but you can change the value.
TimeLogRoundingInterval	The interval (in minutes) that labor time is rounded to when technicians time in and out. The default value is **15**, which means the technician's labor hours are rounded to the nearest 15 minutes. Enter a value of 1-60 minutes. You can change this value only if **UseTimeLog** = **True**. ⚠ If you enter 0, this may cause the calculations to not work as expected.
TimeLogStatusUpdate	Choose the appointment status to default for appointments when the technicians time in. If the status is manually updated in the appointment to the specified status, the technician will be automatically timed in. The default value is empty (disabled). ⚠ *TimeLogStatusUpdate* and *AutoStatusUpdate* in Mobile Device Global Settings _(page 18) cannot have the same value.

Field Invoicing and Field Payment Settings

When you use field invoicing and field payments, you can invoice customers in the field as soon as an appointment is completed, and collect payment for those invoices right away. Invoices are calculated similarly to how they are calculated in Service Management. You can enable this feature by customer, so that some customers can be invoiced in the field and invoices for other customers are generated in the host system. When technicians select to complete an appointment, they can choose to preview the field invoice before the service call appointment is completed and the field invoice is created. During the service call appointment completion process, a field invoice is created and the technician can accept payment, depending on whether field payments are enabled. Both full and partial payments can be made.

This information applies when you use field invoicing and field payments:

- Field invoicing can be used only with service invoicing. Sales Order Processing (SOP) invoicing is not supported.
- Payment term discounts are not supported.
- In the Tax Detail Maintenance window in Microsoft Dynamics GP, the **Based On** field for the tax detail must be set to **Percent of Sale/Purchase**. The other options are not supported with field invoicing. Also, the **Round** field must be set to **Up to the Next Currency Decimal Digit**.
- You must use a tax schedule from the master tax schedule, which is tied to a customer's service location. You cannot use tax schedules for individual cost categories.
- If you use SOP for inventory, the billing amount for items comes from the Item Price List Maintenance window. If you do not use SOP for inventory, the billing amount comes from the Service Management pricing matrix.
- All payment types are accepted, including cash, check, and credit card. However, a customer can use each payment type only once per payment. For example, customers can pay using both a credit card and a check, but not two credit cards. This is consistent with how the On Account window works in Service Management.

These settings only apply if *Field Invoicing and Field Payments* is registered.

Setting	Description
UseFieldInvoicing	Determines whether the organization allows invoicing by technicians in the field. The default value is **False**. If **True**, invoices are generated automatically when appointments for a service call are completed, if the customer is set up to receive field invoices. If **False**, the remaining settings in this section are not available.
FieldInvoicingTaxMode	Determines whether taxes for the organization are calculated for field invoices based on the tax schedule that is set up for a customer location, or if taxes are not calculated for field invoices. The default value is **Do not tax**. • **Do not tax**Taxes are not calculated for field invoices. We recommend that you select this option if taxes are built into your pricing. • **Calculate taxes using Dynamics tax information**Taxes are calculated based on the master tax schedule ID that is set up for the customer location. For more information, see the Help for the Customer Maintenance window in Microsoft Dynamics GP Receivables Management.

Setting	Description
UseFieldInvoicePreview	Determines whether technicians can preview field invoices before they are generated. The default value is **False**.
PreviewInvoiceNumber	The invoice number to use when a preview invoice is generated.You can enter up to seven alphabetic, numeric, or special characters for the preview number. The invoice number is the same for all preview invoices that are generated on all mobile devices and is added as a prefix to the technician's name on the preview invoice. The default value is **PREVIEW**.
UseFieldInvoiceSignature	Determines whether the customer signature that is collected when a service call appointment is completed should be printed on the field invoice. The default value is **False**.
UseFieldPayments	Determines whether technicians can collect payments in the field and then send payment transactions to Microsoft Dynamics GP. The default value is **False**.

Job Safety Tasks

These settings apply only to service appointments. For information about how to set up Job Safety Audit (JSA) information in the host system, see .

Setting	Description
UseJobSafetyTasks	Determines whether the JSA process is used. The default value is **False**. If **False**, the remaining settings in this section are not available. ⚠ If you change this setting to **True**, the JSA process is used only for appointments that are created or edited in Service Management – and then synced – after the setting is changed. Other existing appointments are not impacted.
JobSafetyTaskListType	The JSA task list type. This value is required to use JSA and to make JSA tasks available to technicians.
JobSafetyStartStatus	The appointment status that is used to start the JSA process. When a technician selects this appointment status, the **Job Safety** tab opens automatically so the technician can complete JSA tasks.If a status is selected for both this setting and **AutoStatusUpdate** in the **Mobile Device Global Settings** section, we recommend that you do not use the same status for both.

Setting	Description
JobSafetyUnsafeStatus	The appointment status that is used to indicate that work conditions are unsafe.You might want to create a status specifically for this purpose, such as UNSAFE. You can create this status in the Appointment Status Setup window in Service Management.
JobSafetyValidationLevel	The level of requirement for completing the Job Safety Task report before starting work on appointment tasks. The default value is **REQUIRED**. • **REQUIRED** - The report must be completed to complete an appointment. • **OPTIONAL** - The report does not have to be completed to complete an appointment.

Equipment Settings

Setting	Description
AllowModifyEquipmentRecord	Determines whether technicians can change an equipment record from the client device. The default value is **True**. ⚠ This setting does not prevent technicians from creating new equipment records.
AllowModifyNewEquipmentId	Determines whether technicians can enter the equipment ID when they create an equipment record. The default value is **False**. If **False**, the equipment ID is system generated.
UseRefrigerantTracking	Determines whether the **Refrigerant Tracking** tab is available when viewing equipment on a service call. The default value is **False**. If Refrigerant Tracking is not registered, this value cannot be changed.
AssignedEquipmentValidation Level	The level of requirement for equipment to be assigned during the appointment completion process. The default value is **Optional**. • **OPTIONAL** – Appointments can be completed regardless if equipment has been assigned or not. • **WARNING** – A warning is displayed if equipment has not been assigned to the appointment. • **REQUIRED** – An appointment cannot be completed until equipment has been assigned.

Task Settings

⚠ Beginning with Signature 2018 and MobileTech 6.0, if a task response is marked as required in Service Management, the task cannot be completed until the response is entered.

Setting	Description
DefaultTaskStatus	The default task status when a task is received on a mobile device. The default setting is based on the task status that is set up in Service Management. This value does not apply to the tasks that are displayed when you view tasks by selecting the **All Open Tasks** (hierarchy) view in the **Tasks** pane. This value cannot be changed.
DefaultTaskCompletionStatus	The default status that is used when completing a task on the client device.
TaskValidationLevel	The level of requirement for completing tasks before completing an appointment. The default value is **WARNING**. ⚠ Regardless of the TaskValidationLevel, a value must be entered for all *required* task responses. • **OPTIONAL** – Appointments can be completed regardless of the status of the appointment tasks. • **WARNING** – A warning is displayed if appointment tasks are set to the default task status that is specified in the **DefaultTaskStatus** setting. • **REQUIRED** – An appointment cannot be completed until all tasks have a status other than the default task status, as defined in the **DefaultTaskStatus** setting.
HideTaskEstimateHours	Determines whether estimated hours for a task are hidden on the client device. If **True**, estimated hours are hidden (they are not displayed on the client device). The default value is **False**.
ShowTasksForAppointments	Determines whether tasks that are associated with an appointment are shown with the Appointment pane when a service call appointment is completed. The default value is **False**.
UseTaskMaterials	Determines whether task materials (replacement parts) are displayed for tasks and task hierarchies for service calls. The default value is **False**.

Purchase Order Settings

These settings apply only if you use purchase orders.

Setting	Description
UsePurchaseOrder	Determines whether the **Purchase Orders** tab on mobile devices is active. Technicians can use that tab to enter purchase orders. The default value is **True**.
PurchaseOrderValidationLevel	The level of requirement for entering purchase orders before completing an appointment. The default value is **OPTIONAL**. • **OPTIONAL** – Technicians do not need to enter purchase orders before completing appointments and are not prompted to enter them. • **WARNING** – Technicians are prompted, but not required, to enter purchase orders before completing appointments. • **REQUIRED** – Technicians must enter at least one purchase order before completing appointments.
AutoGeneratePurchaseOrderNumbers	Determines whether purchase order numbers are generated automatically. If **True**, purchase order numbers are generated automatically and cannot be changed by technicians. If **False**, technicians can enter purchase order numbers. To use a unique prefix to make it easier to identify in the host system purchase orders that were entered by technicians, select **False**. Then, for the **DefaultPONumberPrefix** setting, enter a prefix to display on purchase orders that are created by technicians. The default value is **True**.
DefaultPONumberPrefix	Enter a unique purchase order number prefix to display on purchase orders that are created by technicians. You can change this value and generate special prefixes only if **AutoGeneratePurchaseOrderNumbers** = **False**.
DefaultPOItemNumberPrefix	Enter a default prefix to display when technicians enter a non-inventory item on a purchase order line.
DefaultSite	The default inventory site to use when technicians create purchase orders. If a technician is assigned to this site in Service Management, the site is displayed by default in the **Site** field in the PO Lines pane. If a technician is not assigned to this site in Service Management, the **Site** field is blank.
DefaultUnitOfMeasure	The default inventory unit of measure to use when technicians create purchase orders.
UnknownVendorId	The default vendor ID to use when a vendor name is not displayed in the lookup window. Technicians can select the **Unknown Vendor** option on devices when they purchase an item from a new vendor who is not set up in Service Management.
UsePurchaseOrderReceipt	Determines whether technicians can view and receive against COMMITTED drop-ship purchase orders that are entered in Microsoft Dynamics GP. The default value is **False**.

Resolution Settings

These settings apply only to service appointments.

Setting	Description
UseResolution	Determines whether the **Resolution** tab is displayed when an appointment is being completed. The default value is **True** and cannot be changed.
ResolutionValidationLevel	The level of required information that must be entered on the **Resolution** tab when completing an appointment. The default value is **OPTIONAL**. • **OPTIONAL** – Technicians do not need to complete the information on the tab to complete the appointment. • **WARNING** – A warning is displayed to indicate that information on the tab is not complete. • **REQUIRED** – Technicians must complete the information on the tab to complete the appointment.
ResolutionNoteValidationLevel	The level of required information that must be entered for a Resolution Note is created. The default value is **Optional**. • **OPTIONAL** – Technicians do not need to complete the information on the tab to complete the appointment. • **WARNING** – A warning is displayed to indicate that information on the tab is not complete. • **REQUIRED** – Technicians must complete the information on the tab to complete the appointment.
UseAppointmentResolutionNote	Determines whether the Appointment Summary or Call Summary report is generated when resolution notes are entered for an appointment or service call. If **True**, and resolution notes are entered for appointments, the Appointment Summary report is generated. If **False**, and resolution notes are entered for service calls, the Call Summary report is generated. The default value is **False**.

Labor Settings

Setting	Description
UseLabor	Determines whether **Labor** is an entry type option in Time Entry when an appointment is being completed. The default value is **True**. If **False**, the remaining settings in this section are not available.

Setting	Description
LaborValidationLevel	The level of information that is required for labor when completing an appointment. The default value is **OPTIONAL**. • **OPTIONAL** – Technicians do not need to complete labor information to complete appointments. • **WARNING** – A warning is displayed to indicate that labor information is not complete. • **REQUIRED** – Technicians must complete labor information to complete appointments.
DefaultCostCodeLabor	The default cost code that is displayed on the device for labor.
DefaultBilledHourlyPayCode	The default pay code that is displayed on the device for billed hourly labor. Technicians can set up or change any pay code on an individual device.
DefaultUnbilledHourlyPayCode	The default pay code that is displayed on the device for hourly labor that is not billed. Technicians can set up or change any pay code on an individual device.
ShowTechnicianTotalLaborHours	Determines if the technician's hours display in the Time Entries and Appointment Entry headers. The default value is set to **False**. • **Time Entry header** - Displays the current week or previous week total hours, depending on the drop-down selection. • **Appointment Entry header** - Displays the total appointment hours.

Travel Settings

> ⚠ In the current release, extended pricing is not supported for travel and expense transactions through Time Entry.

Setting	Description
UseTravel	Determines whether **Travel** is an entry type option in Time Entry when an appointment is being completed. The default value is **True**. If **False**, the remaining settings in this section are not available.

Setting	Description
TravelValidationLevel	The level of information that is required for travel when completing an appointment. The default value is **OPTIONAL**. • **OPTIONAL** - Technicians do not have to complete travel information to complete appointments. • **WARNING** - A message is displayed to indicate that travel information is not complete. • **REQUIRED** - Technicians must complete travel information to complete appointments.
DefaultBilledTravelPayCode	The default pay code that is displayed on the device for billed travel. Technicians can set up or change any pay code on an individual device.
DefaultUnbilledTravelPayCode	The default pay code that is displayed on the device for unbilled travel. Technicians can set up or change any pay code on an individual device.

Expense Settings

> ⚠ In the current release, extended pricing is not supported for expense and travel transactions through Time Entry.

Setting	Description
UseExpense	Determines whether **Expense** is an entry type option in Time Entry when an appointment is being completed. The default value is **True**. If **False**, the remaining settings in this section are not available.
ExpenseValidationLevel	The level of information that is required for expenses when completing an appointment. The default value is **OPTIONAL**. • **OPTIONAL** – Technicians do not have to complete expense information to complete appointments. • **WARNING** – A message is displayed to indicate that expense information is not complete. • **REQUIRED** – Technicians must complete expense information to complete appointments. You can change this value only if **UseExpense** = **True**.
DefaultCostCodeExpense	The default cost code that is displayed on the device for expenses. You can change this value only if **UseExpense** = **True**.

Setting	Description
DefaultBilledExpensePayCode	The default pay code that is displayed on the device for billed expenses. Technicians can set up or change any pay code on an individual device. You can change this value only if **UseExpense** = **True**.
DefaultUnbilledExpensePayCode	The default pay code that is displayed on the device for unbilled expenses. Technicians can set up or change any pay code on an individual device. You can change this value only if **UseExpense** = **True**.

Inventory Settings

Setting	Description
UseInventory	Determines whether the **Inventory** tab is displayed when an appointment is being completed. The default value is **True**. If **False**, the remaining settings in this section are not available.
UseNonInventoryItems	Determines whether non-inventory parts can be entered on the device. The default setting is **True**. ⚠ If you use non-inventory items as task materials and **UseTaskMaterials** = **True**, you should set this option to **True**.
InventoryValidationLevel	The level of information that is required on the **Inventory** tab when an appointment is being completed. The default setting is **OPTIONAL**. • **OPTIONAL** – Technicians do not have to complete the information on the tab to complete the appointment. • **WARNING** – A message is displayed to indicate that information on the tab is not complete. • **REQUIRED** – Technicians must complete the information on the tab to complete the appointment.
ShowInventoryCost	Determines whether the **Inventory Cost** field is displayed on the tab. The default value is **True**.
ShowInventoryPrice	Determines whether the **Inventory Price** field is displayed on the tab. The default value is **True**.

Setting	Description
ShowInventorySiteQtyAvailable	Determines whether Inventory Site Quantity based on the technician's sites in Technician Setup. The default value is **False**.Additional setup requires you to choose the **Load Data** tab, select your technicians, mark **Sync Lookups**, and then choose *Import*. The calculation used is *Quantity on Hand - Quantity Allocated per item in Microsoft Dynamics GP - Quantity in the MobileTech Inventory holding table (WS20002).*

Signature Settings

These settings apply only to service appointments.

> ⚠ The Signature tab displays if at least one Signature option is marked True.

Setting	Description
UseTechnicianSignature	Determines whether the **Signature** tab is displayed when an appointment is being completed. The default value is **True**.
TechnicianSignatureValidationLevel	The level of information that is required to capture the technician name and signature when completing an appointment. The default value is **OPTIONAL**. • **OPTIONAL** - A technician name and signature is not required to complete an appointment. • **WARNING** - A message is displayed to indicate that a technician name and signature has not been captured. • **REQUIRED** - A technician name and signature is required to complete an appointment.
UseCustomerSignature	Determines whether the **Signature** tab is displayed when an appointment is being completed. The default value is **True**.
CustomerSignatureValidationLevel	The level of information that is required to capture the customer name and signature when an appointment is being completed. The default value is **OPTIONAL**. • **OPTIONAL** - A customer name and signature is not required to complete an appointment. • **WARNING** - A message is displayed to indicate that a customer name signature has not been captured. • **REQUIRED** - A customer name and signature is required to complete an appointment.

2SEE Settings

XOi (formerly XOEye) equips field technicians with wearable technology systems, or the free Vision Telepresence Client app for Android and iOS devices, that capture and share information. The technician can capture an image and/or video that is uploaded to the XOi server. After uploading in the client, the unique hyperlink is copied to the Resolution Note. After synchronizing, back office users can view the attachment to the service call. Anyone with the unique hyperlink can view and/or download the images or video. The activities on the XOi server are tagged with the call ID, appointment number, location name, and XOi user ID. The hyperlink is available for 30 days.

> ⚠ To enable the legacy SEE tab on the Appointment Completion window in the MobileTech Client, see Enable the Legacy SEE Integration with MobileTech 7.5 (optional) (page 10).

Setting	Description
UseXOEye	Determines if the XOi API is enabled. The default value is **False**.
UseXOEyeWorkflow	Determines if XOi Workflow is enabled. The default value is **False**.
XOEyeClient ID	Defaults to MobileTech. Display only.
XOEyeLoginURL	Defaults to the XOi login URL. Display only.
XOEyeVisionURL	Defaults to the XOi Vision endpoint. Display only.
XOEyePartnerID	Enter your XOi Partner ID that has been provided to you from XOi.

Set up Additional Options

These options are available from the MobileTech Setup Options > Options page.

-
-
-
-

Set up attachment extensions

You can specify the types of file extensions for attachments that can be sent to devices from the host system.

1. In MobileTech Administration, choose *Setup Options*, and then choose *Options > Attachment Extensions*. The Attachment Extensions Setup page displays a list of default extensions.
2. To add an extension type, choose the **Add** icon. In the **Extension** column, enter the type of extension for the attachment.

3. To delete an extension type, select an extension type and choose the **Delete** icon. You can also choose the *Refresh* icon to update the list.
4. Choose the *Save* icon to save the changes.

Set up customer options for field invoicing and field payments

If your organization uses field invoicing, you can allow and restrict which customers the technicians can generate field invoices for in MobileTech. For example, you might let technicians generate invoices for residential customers, but not for commercial customers. You can restrict or allow access to individual customers or to all customers. Field invoicing is available only if Field Invoicing and Field Payments is registered, and **UseFieldInvoicing** = **True** in the setup options.

1. In MobileTech Administration, choose *Setup Options*, and then choose *Options > Customer Options*. The Customer Setup page is displayed.This page displays a list of customers who are set up in the Customer Maintenance window in Microsoft Dynamics GP, and who have this information set up:
   - Service area
   - Primary and secondary technician
   - Labor rate group
   - Price matrix
2. Make sure the **Disable Field Invoicing** checkbox is not marked for the customers for whom technicians can generate field invoices. If that checkbox is marked for a customer, a technician cannot create a field invoice for that customer. You can complete these actions by using the icons on the page:
   - **Navigation buttons** - Go to a record that is not highlighted. For example, you can go to the first, next, or previous customer record, or the last record in the list.
   - **Refresh icon** - Apply changes that were made since the last time you saved changes on the page.
   - **Select All Toggle icon** - Mark or unmark the **Disable Field Invoicing** checkbox for all the customers in the list.
3. Choose the *Save* icon to save the changes.

Set up report and email options

You can specify options to send MobileTech reports via email.

1. In MobileTech Administration, choose *Setup Options*, and then choose *Options > Report Options*. The Report and Email Options page is displayed.
2. You can set up the following information for sending reports and other documents, such as invoices, to a customer.
   - **Report Source**
     The name of the report. Available reports are:
     - **Call Summary**
     - **Field Invoice**

       > ⚠ The Field Invoice report is available only if Field Invoicing and Field Payments is registered, and **UseFieldInvoicing** = **True** in the setup options.

     - **Job Safety Audit**
     - **Employee Time Sheet**

       > ⚠ When the Email Technician option is marked, the Employee Time Sheet is emailed to the technician logged into the device:

- After a job appointment is completed and synced, if the appointment has at least one time entry. The Time Sheet will be for the current week and include all Job Cost transactions for the employees assigned to the time entries for the job appointment.
- When the report is requested from the Time Entries list. The current list view determines which week the Time Sheet will be for, and it will include all transaction types (Job Cost, Service, and Unbilled). The employees included in the report will be determined by the user's selection (run the report for all or select which employees to include).

- **Appointment Summary**
- **Inspection Report**

> ⚠ The Inspection Report is available only if VEI is registered.

- **Job Appointment Summary**

- **Appointment Type**
  Indicates whether all appointments or only service appointments are displayed on the report.
- **Call Type**
  The default call type filter for the report. **Blank** displays all call types.

> ⚠ For inspection reports, verify that the correct call type is set up for inbound and outbound calls.

- **Division**
  The default division filter for the report. **Blank** displays all divisions.
- **Email Technician** - Mark the checkbox if you want the technician to receive the report via email.
- **Report Type**
  Indicates a SQL Server Reporting Services (SSRS) report.
- **Report Format**
  The output format of the report:
  - PDF – Acrobat file
  - EXCEL – Microsoft Excel file
  - MHTML – Web archive file
  - IMAGE – Tagged Image File Format (TIFF) file
- **Report Path Name**
  Use SQL Server to determine the path where the report is deployed. The path is most likely either /Company Name/WennSoft Service/Call Summary or /Company Name/Signature Service/Call Summary, depending on whether you upgraded to MobileTech from a previous version or installed it for the first time.
- **Contact Role Type**
  Specifies which contacts receive automatic emails if you selected **Signature Contact Management** for the **ReportEmailMode** setting in the setup options. Enter a contact role type to send emails only to contacts of a certain type. If you enter **%**, emails will be sent to all contact types.

> ⚠ Only one Contact Role Type may be entered.

- **Email From Address**
  The email address that reports or other documents, such as invoices, are sent from. If you use a generic company email address, such as `MobileTech@YourCompany.com`, you can prevent the technician from having to forward a report email to a customer contact, so the customer will not have the technician's email address.

- **Email Subject**
  The subject of the email message when the report is sent.
- **Email Body**
  The body text of the email message when the report is sent.

3. Choose *Save.*

Optional: Add call, appointment, and location information to email subject lines and attachment names

You can set up MobileTech to automatically include the service call ID and appointment number in the email subject line and the name of the PDF attachment when Call Summary, Appointment Summary, or Field Invoice reports are sent via email.

1. In MobileTech Administration, choose *Setup Options*, and then choose *Options > Report Options*. The Report and Email Options page is displayed. Scroll to the **Email Subject** column.
2. In the **Email Subject** column, to include the following automatically.
   - **Service Call ID and Appointment Number** - Enter a space and then type `({0})` .
   - **Service Call ID, Appointment Number, and Location** - Enter a space and then type `({0} : {1})` .
3. Choose the *Save* icon and close the page.

Optional: Specify which report attachments sync to devices

By default, the following report attachments are not synced from the middle-tier database to the devices:

- Appointment Summary report
- Call Summary report
- Job Appointment Summary report
- JSA report

You can change the attachment sync filter in Woodford if you want these report attachments to be synced to the devices.

1. In MobileTech Administration, choose *Tools > Launch Woodford*. The Dynamics CRM Login Dialog window is displayed.
2. Enter the URL, user name, and password to log on to Woodford. The URL must include the server name and port where MobileTech is installed, and the name of the company database (in lowercase letters). Example:
   `http://servername:8080/companydatabase.`
3. Choose *OK*.
4. In the Woodford workspace, double-click your mobile project.
5. In the navigation pane, choose **Note**, and then choose *Sync Filter* on the toolbar. The Edit Filter window is displayed. This window lists the conditions for the reports that are not currently synced to the devices.
6. Remove the condition for the report attachments that you want to sync to the devices. For example, if you want Call Summary reports to be synced to the devices, choose the drop-down arrow for the **Name** – **Does Not Contain** – **Call Summary Report** condition, and then choose *Delete* from the menu that appears.
7. When you have finished editing the sync filter, choose *Save & Close* on the toolbar.
8. Choose *Publish All* on the toolbar.

Set up TimeTrack batch options

You can specify a custom batch name for TimeTrack transactions that are entered from a mobile client device.

> ⚠️ In the current release, extended pricing is not supported for expense and travel transactions through Time Entry.

When technicians complete a call that contains labor, a batch is created in TimeTrack. Users can commit and post these batches as they would any other TimeTrack batches.

1. In MobileTech Administration, choose *Setup Options*, and then choose *Options > TimeTrack Batch Options*. The TimeTrack Batch Options page is displayed.
2. Enter a custom batch name, or choose to base the name on the technician ID, branch name, technician team, or service area.
3. You can optionally choose to include the Time Track week-ending date or the transaction date in the batch name.

> ⚠ Because either of these options contain eight characters and the batch name can be only 15 characters long, if you mark this checkbox, the name you specified in step 2 is truncated to seven characters, if necessary.

4. Choose *Save*.

Set up new users

Use this information to help you set up new users individually or to import multiple users:

- Add a MobileTech user (page 36)
- Import multiple MobileTech users (page 37)
- Load data (page 37)

> ⚠ You cannot exceed the number of active MobileTech technicians that you are licensed for.

Add a MobileTech user

When you are setting up MobileTech after installing or upgrading, you will add users and then continue with the setup steps, including those described in Load data (page 37).
However, when you add users later – such as when new technicians join your organization – you can refresh the lookups rather than syncing them, to improve performance during the load data process.

> ⚠ Use the filter options to narrow the user display list. You can filter by user, technician ID, or login account. Enter a partial or whole entry and then choose the *Filter* 🔍 icon. To clear the filter, choose the *Clear Filter* 🔍 icon.

Add a user before you load data and sync lookups

1. In MobileTech Administration, choose *Users*, and then choose *Add User*. The user fields are displayed on the page. Enter information in these fields.
   - **First Name**: Enter the first name of the user.
   - **Last Name**: Enter the last name of the user.
   - **Email Address**: Enter an email address for the user. The email address becomes the user name for the technician when the technician signs in to a client device.This is also the email address where the Call Summary, Employee Timesheet, Job Appointment Summary, and Job Safety Audit reports are sent.
   - **Password** and **Confirm Password**: Enter and confirm a password that lets the user sign in to MobileTech.
   - **Technician ID**: Select the identifier for the technician whom you are adding as a user.

- **Employee ID**: After you set up and save user information, the employee ID that is set up in Microsoft Dynamics GP for the user is displayed as an ID for the employee.
- **Locked/Disabled** checkboxes: If you are have set up password complexity and a lock out policy, you can unmark the appropriate checkbox if the user is locked out or has disabled their account due to invalid login attempts. See Set up Password Complexity and Lockout Policy (page 12) for more information.
- **Roles**: Select the role of the MobileTech user. By default, a client user is assigned to the **MobileTech** role. To assign a user to the system administrator role in MobileTech Client, mark **System Administrator**.See User Role Maintenance (page 38) for information on creating roles.

2. Choose *Save*. The user is added to the list of users in the column on the left.

Add a user after you have loaded data and synced lookups

1. In MobileTech Administration, choose *Users*, and then choose *Add User*. The user fields are displayed on the page.
2. Enter information in the fields, as described above in *Add a user before you load data and sync lookups*.
3. Choose *Save*. The user is added to the list of users in the column on the left.
4. Choose *Tools > Refresh Lookups*.
5. Mark the **Employee** checkbox and the checkboxes for all its child entities, such as **Pay Code**, **Work Crew**, and so on.

> ⚠ When you mark a lookup, other associated lookups might be marked if there are dependencies between the lookups. For example, if you mark the checkbox for a child lookup, the parent lookup automatically is marked because that must be refreshed, too.

6. Choose *Refresh*.
7. Choose *Load Data*.
8. Mark the checkboxes for the technician to load data for.
9. Enter the date range to include when you load and sync data, and leave the **Sync Lookups** checkbox unmarked.
10. Choose *Import*, and then choose *Close*.

Import multiple MobileTech users

You can import multiple user records from Microsoft Dynamics GP instead of adding individual users.
All users who are set up as technicians in Service Management are listed. You can select only the number of technicians you purchased licenses for.

1. In MobileTech Administration, choose *Users*, and then choose *Import*. The Bulk User Load page is displayed.
2. Mark the checkboxes for the technicians whose records you want to import. These users will be assigned to the role of **Mobile Tech**.
3. If a technician does not have an email address and password assigned, enter that information in the appropriate columns. The email address for each technician must be unique.Each technician's email address also is used to send and receive reports that are associated with technician activities.
4. Choose *Update*. The technicians are added to the list of users in the column on the left.

Load data

You must load data into the organizational database for each technician you select. Any data that is associated with open calls and appointments for each technician, and for the specified date range, is included.

Each time you load data, lookups are processed first, followed by all items that are available to sync in the WSMobileTechSync table are processed first. The progress information for the process is displayed as Integration Synchronization.

1. In MobileTech Administration, choose *Load Data*.
2. Mark the checkboxes for the technicians to load data for, or choose *Select All* to mark all the technicians in the list.
3. Enter the date range to include when you load and sync data.

> ⚠ We recommend that you limit the date range so only current and relevant data is included and historical data for transactions is not included. For performance reasons, the maximum date range is two months.

4. Mark the **Sync Lookups** checkbox.

> ⚠ If there is no data to sync in certain lookup tables, this checkbox is marked and cannot be unmarked. You do not need to mark this checkbox if you are adding subsequent users after you have already loaded data and synced lookups. For more information, see Add a MobileTech user (page 36).

5. Choose *Import*. The processing time is determined by the number of technicians, the amount of data to import, and the date range that you entered.
6. Choose *Close*.

User Role Maintenance

The Role Maintenance window is used to add or delete user-created roles. You can also add technicians to the roles in this window. The default roles of System Administrator and MobileTech are created during the installation of MobileTech and cannot be deleted.

> ⚠ Using Woodford, you can customize the application to user roles. For specific information about how to use Woodford to customize your application, see the *Resco Mobile CRM Woodford User Guide*.

- Adding a new role (page 38)
- Adding one or more technicians to a role (page 38)
- Removing one or more technicians from a role (page 39)
- Deleting a role (page 39)
- Deleting multiple roles (page 39)

Adding a new role

1. In MobileTech Administration, choose *Role Maintenance*.
2. Choose *Add Role* to create a new role.
3. Enter a **Role Name** and choose *Add*.
4. Choose *OK*.

Adding one or more technicians to a role

1. In MobileTech Administration, choose *Role Maintenance*.
2. Choose the role you are assigning technicians to in the Role Name list.
3. Choose *Add Technicians*.
4. Use the filter options to narrow the technician display list. You can filter by name or technician ID. Enter a partial or whole entry and then choose the *Filter* ⧩ icon. To clear the filter, choose the *Clear Filter* ⧩ icon.
5. Mark the checkbox next to the technician(s) to add to the role.

6. Choose *Add*.

Removing one or more technicians from a role

1. In MobileTech Administration, choose *Role Maintenance*.
2. Choose the role you are removing the technician from in the Role Name list.
3. Mark the checkbox(es) next to one or more technicians.
4. Choose *Remove Technicians.*
5. Choose *Yes* in the confirmation window.

> ⚠️ Technicians may also be added to or removed from roles in the User window by marking/unmarking the checkbox next to the role name and then saving the User record.

Deleting a role

1. In MobileTech Administration, choose *Role Maintenance*.
2. Choose the role in the Role Name list.
3. Choose *Delete Role*.
4. Choose *Yes* in the confirmation window.

Deleting multiple roles

1. In MobileTech Administration, choose *Role Maintenance*.
2. Choose *Add Role*.
3. Mark the checkboxes next to the roles to be deleted.
4. Choose *Delete Selected Roles*.
5. Choose *Yes* in the confirmation window.

Set up additional companies

You must set up each company that is in the Microsoft Dynamics GP database.

1. In MobileTech Administration, choose *File > Change Company*. The Change Company page is displayed.
2. Select a company and choose *OK*.
3. See to continue with the procedures to set up each company.

Import the MobileTech Woodford Project

Resco's Woodford component is a tool that lets you customize and configure MobileTech for your business purposes.

> ❗
>
> ## Important information for upgrade customers who already use Woodford
>
> - **Do not install a version of Resco Cloud that is newer than v12.x.x.xxxx.** Do not install a newer version of Woodford until you are instructed to do so by WennSoft. Woodford is a third-party product and you must use a version of Woodford that is compatible with the version of MobileTech you are using.

- **When you launch Woodford, if the "New update is available" message is displayed, choose *Later*.** After you install and activate Woodford, we recommend that you set up Woodford so you are not prompted to install a newer version when it is released by Resco. In Woodford, choose *Settings* and unmark the **Check for updates on startup** checkbox.
- **Your existing MobileTech project must be deactivated before you import a new or updated project.** If you are importing an updated project with the same name, you will need to rename the deactivated project using Properties from the top navigation before importing. Then choose *Create New* in the window that displays.

To import the MobileTech Woodford project:

We recommend that when you launch Woodford, you log on by using the system administrator credentials you used when you installed MobileTech Administration.

1. In MobileTech Administration, choose *Tools > Launch Woodford*.
2. Enter the user name, and password to log on to Woodford.
3. Choose *OK*.
4. The Registered User window may display. If it does, enter your contact information in the window and choose *Register*.
5. If the "New update is available" message is displayed, choose *Later*.
6. If you have an existing MobileTech project, you must deactivate the project before importing the new/updated project. Select the project and then select *Deactivate* from the top navigation.

> ⚠️
> - If you have already made customizations to MobileTech by using Woodford, you must reapply those customizations each time you upgrade MobileTech and the corresponding Woodford project.
> - Re-enable any options that were enabled in Woodford. For example, if you are using Mobile Auditing (page 43) (UseMobileAuditBackgroundSync=True), please be sure to re-enable the Woodford Auditing settings after importing a new Woodford projects.

7. Choose *Import* and browse to the location where the MobileTech.woodford file was saved when you installed MobileTech Administration. For most users, the location of the Woodford file is C:\Program Files (x86)\Signature\MobileTech\Admin\Woodford.
8. In the Add Mobile Project window, select **MobileTech x-xx-xxx.woodford** and then choose *Open*.

> ⚠️ If you are re-importing the same project version and are prompted to overwrite the existing deactivated project, choose *Cancel* and then rename the existing deactivated project using Properties in the top navigation. Then import the project and choose *Create New* in the window that displays and continue with the instructions below.

9. The **Type** and **Name** default in.
10. Mark the **MobileTech** checkbox for the role.
11. Choose *Save*. An exclamation point ⊙ icon displays next to the mobile project to indicate the project has not been published.
12. Double-click the MobileTech mobile project.
13. In the Navigation bar at the top, verify that the **Publish Version** displays 12.0 (default value). To avoid sync issues, do not change this field.
14. Choose *Publish All*.
15. In the Select Projects window, verify that MobileTech is marked and then select *OK*.
16. Unmark the option to be notified when Woodford updates are available. In Woodford, choose *Settings* and unmark the **Check for updates on startup** checkbox.,
17. Click *Save*.

See Set up Woodford (page 41) for information on customizing and configuring entities. For information about how to use Woodford to further customize your application, see the Resco Mobile CRM Woodford User Guide[2].

Sync the technician devices

Sync the technician devices using MobileTech Client. The "Application was updated" message is displayed on the device to indicate that a Woodford project is active.

Set up Woodford

- Enable Flexible Forms (page 42)
- Enable Mobile Auditing (page 43)
- Set the Fetch Limit (page 44)
- Set up the Sync Date filters (page 44)
- Enter the Google Maps API key (page 45)
- Enabling Sync Dashboard (page 45)

⚠️

Avoid making these changes with Woodford

This information is intended to provide insight into areas that cannot be modified by using Woodford. It also includes recommendations about which entities you should not change.

Tabs that you cannot modify

You cannot use Woodford to modify the **Resolution** tab and the **Summary** tab for appointments in MobileTech.

Background Download Configuration setting

The **Background Download** option must remain at its default *False* setting. This setting is found in the Woodford project in Settings > Configuration > Offline Data Sync - Background Sync > Background Download. These are the known issues if this setting is changed:
- Background Download interferes with the MobileTech AutoStatusUpdate feature.
- The first list that is opened from the Home screen is cached and you cannot close it or refresh it. This can cause stale data to remain on the list.

Entities that you should not change Sync Filters for

To help make sure that all records sync accurately, we recommend that you do not change sync filters for the following entities. Changing these filters could result in unexpected behavior and sync issues.
- Appointment Status Time Stamp
- Change Order
- Change order detail
- Consumed inventory
- Contract

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2 https://www.resco.net/woodford-user-guide/

- Equipment
- Contract equipment
- Location
- Sublocation
- Location Contact
- Job
- Job Cost Code
- Job Safety Task
- Meter Reading
- Purchase Order
- Purchase Order Detail
- Purchase Order Receipt
- Purchase Order Receipt Detail
- Refrigerant Tracking
- Tasks
- Subtasks
- Time log

Enable Flexible Forms

The flexible form is a way for users get a perfect overview of any record at a glance. Instead of users choosing various tabs to the view information, you can put the record's fields, associated views and other items into one screen.

> ⚠ The Appointment, Appointment Completion, Customer, and Location entities have been tested to work with flexible forms. While other forms can be modified to use with flexible forms, doing so is at your own risk.

Enabling flexible forms

1. In MobileTech Administration, choose **Tools**, and then choose **Launch Woodford**.
2. Choose the MobileTech project and then choose *Edit* from the menu bar.
3. In the navigation bar, choose **Configuration**.
4. In the Mobile CRM Configuration section, complete the following:
   - **Flexible Forms**: Enable Flexible Forms by setting this to **True**.
   - **Flexible Forms use Vertical List**: We recommend you leave this option set to **True**. If set to False, the forms scroll horizontally on larger devices.

> ⚠ • Smaller devices like smart phones display the information in a single vertical scroll window. Larger devices may display up to three columns of information, depending on the size of the device. Additionally, when scrolling on an Android or iOS device, a hover menu bar displays that a user can tap to navigate quickly to a section.
> • The barcode icon is not available when a list is displayed in a completion form if Flexible Forms is set to True in Woodford. The barcode icon is available in full panel mode, which you can access by double-tapping the section header.

Customizing forms

For information about how to customize the Appointment, Appointment Completion, Customer, and Location forms and their associated tabs, see the *Flexible Forms* section in the *Resco Mobile CRM Woodford User Guide*.

Enable Mobile Auditing

Use Woodford's Mobile Audit feature to update the Technician Vehicle table (SV00113). The location information updates automatically based on time/distance plus you can choose to have the location updated when the technician updates appointments, creates a labor transaction, and/or times in/out of appointments.

The location data is updated when the device is synchronized to the host. We recommend that you use event-based synchronization so that the technician location coordinates are sent when completing (and syncing) their appointments. This will also enable other applications such as Schedule to view the most up-to-date information about the technician's location. For more information about synchronizing, see Setting up Host Syncing (page 46).

1. In MobileTech Administration, go to *Tools > Launch Woodford*.
2. Open the active Mobile Project.
3. Navigate to the **Auditing** tab on the left panel.
4. Under *Auditing Settings*, mark the following checkboxes:
   - **Enable**
   - **Include GPS position**
   - **Track GPS position changes**: We recommend that you use the default values for Delay (600 seconds) and Distance (500 meters) as reducing these values may affect the device battery performance.

   > ⚠ Choose *Yes* when prompted with "Track GPS position is obsolete function replaced by Location Tracking. Are you sure to turn it on?"

5. The settings above are enough to track the technician's location in the Technician Vehicle table (SV00113), but if you also want to track entity-specific changes (Create and/or Update), you can mark the following options under *Enable auditing for the following entities and operations*:
   - **Appointment**: If you want to know where the technician was when recording his/her appointment data.
   - **Time Entry**: If you want to know where the technician was when recording labor transactions.
   - **Time Log**: If you want to know where the technician is timing in or timing out of appointments.

   > ⚠ You will also need to set up the following options in MobileTech Admin. See Mobile Device Global Settings (page 18) in Set up MobileTech Options.
   >   - **UseMobileAuditBackgroundSync**: Used to control the ability to auto-upload mobileaudit records to the host. This is used with Woodford's Auditing feature to track technician GPS coordinates based on creating or updating specific entities such as Appointment, TimeLog, or TimeEntry. Set this option to **True**.
   >   - **OnSiteStatusUpdate**: Used when UseMobileAuditBackgroundSync=True to determine what status will be used to automatically send the technician's GPS coordinates to the host. No synchronization is required, but an internet connection must be available.

6. Choose *Save*.
7. *Publish* the project.

Set the Fetch Limit

The Fetch Limit is the number of Customer Location (customers and locations) or Equipment records that the SERVER MODE fetches at a time in the New Service Call window in the MobileTech Client. The Fetch Limit defaults to 100. A Customer Location/Equipment search field displays at the top of the New Service Call window if the number of customers, locations, and equipment records are equal to or greater than the fetchLimit value.

> ⚠ **UseServerMode** must be set to **TRUE** in MobileTech Admin <u>Mobile Device Global Settings (page 18)</u>. This setting defaults to TRUE.

1. In MobileTech Administration, go to *Tools > Launch Woodford*.
2. Open the active Mobile Project.
3. Navigate to the **Offline HTML** tab on the left panel.
4. Double-click **forms** to open.
5. Select **form_servicecall.js** and then choose *Edit*.
6. Under FETCH LIMIT, edit the **var fetchLimit** value. The default is 100.
7. Choose *OK*.
8. Choose *Save*.
9. *Publish* the project.
10. Technicians will need to synchronize to update the MobileTech Client.

Set up the Sync Date filters

Beginning with MobileTech 7.5, the Start Sync Date filters are now set up in Woodford and are a global setting. Prior to MobileTech 7.5 this was a device setting in the MobileTech Client app. If you need to have different sync rules for different technicians, you will have to clone the Woodford project and use different Roles to identify those different sync rules.

The default setting is +/- 1 month. If you need to adjust the Sync Filter range, you will need to update each of the following 3 entities in Woodford:

- **Appointment**
- **Customer**
- **Service Call**

To set up the Sync Date filters:

1. In MobileTech Administration, choose **Tools**, and then choose **Launch Woodford**.
2. Choose the MobileTech project and then choose *Edit* from the menu bar.
3. In the navigation bar, select an entity from the left navigation.

> ⚠ Make sure to click on the entity name to display the **Entity** view. If you click the icon to the left of the entity name, the **Mobile Views, Forms and Charts** view displays. The *Sync Filter* button only displays on the **Entity** view.

4. Click *Sync Filter* in the top navigation.
5. In the Edit Filter window, to the right of each Start Date:
    a. Enter a new value for **Last X Months**.
    b. Enter a new value for **Next X Months**.
6. Select *Save*.
7. Complete the same steps for the other entities, making sure to enter the same values as the first entity.
8. *Save* the project.

9. *Publish* the project.

Enter the Google Maps API key

If you will be using the Mapping feature on a Windows computer, you will need to obtain a Google Maps API key at https://cloud.google.com/maps-platform/pricing/. (You will need an API key that includes Maps and Routes. You do not need Places.)

1. In MobileTech Administration, choose **Tools**, and then choose **Launch Woodford**.
2. Choose the MobileTech project and then choose *Edit* from the menu bar.
3. In the navigation bar, choose **Configuration**.
4. Scroll down to the **Integrations - Google** section.
5. Enter the key in the **Google API Key** field.
6. Mark the **Lock** checkbox.
7. Select *Save* in the top navigation.
8. *Publish* the MobileTech project.

Enabling Sync Dashboard

Sync Dashboard is a comprehensive monitoring tool that gives you a 360º overview of sync details including what are the sync errors, how many users have sync errors, how long each sync takes, the average sync length, how many records are synced, and more. This also includes a *Sync conflict resolution feature*. This is a separate tool and needs to have **Auditing** and **Log synchronization event** enabled in the MobileTech Woodford project. For an in-depth overview, see your Woodford documentation and/or this blog post: https://blog.resco.net/2019/02/21/sync-dashboard/.

To enable Sync Dashboard:

1. Launch Woodford and open the mobile project.
2. Navigate to the Auditing panel on the left menu.
3. Mark **Enabled** and **Log synchronization event**. From this point on, all client sync logs will display in the Sync Dashboard.
4. Publish the Woodford project.
5. Syncing a device to log sync activity.
6. Open a browser and enter your MobileTech server name.
7. On the Resco Cloud Apps & Tools window, select **Sync Dashboard**.

Set up MobileTech on a Client Device

The following topics are also available in the MobileTech Client Help the device.

- MobileTech Client Setup on a Mobile Device _(page 47)
- Setting up Host Syncing _(page 46)

Additional information:

- **Technician information to sign in to or sync a mobile device**: To sign in to a device or to sync a device with the host system, a technician must enter the URL of MobileTech Integration Sync Server and a user name. The URL must include the server name, website port number, and company database name. Example: http://servername:8888/companydatabase
- **Technician usernames are their email addresses**: A technician's MobileTech username is the email address that is set up in MobileTech Administration. See Add a MobileTech user _(page 36). Technicians must use their email addresses to sign in to a client device.

Setting up Host Syncing

Synchronizing, or syncing, with the host system lets you update the information on your mobile device with any changes that might have been made in Microsoft Dynamics GP. Syncing also updates the host system with changes that you make on your mobile device, such as changes to the statuses of calls and appointments, or new notes and attachments.

Syncing can be set up based on events and you can manually sync your mobile device at any time. If you cannot click on a setup field on your device, you must contact your administrator to unlock the field.

> ⚠ **IMPORTANT**: While Resco offers an automatic sync option, we advise against using it as it has caused issues with MobileTech functionality.

Event-based syncing

If MobileTech is set up to use event-based syncing, event-based syncing is used to synchronize your device to the host system in these situations:

- You choose **Save** after creating a service call.
- You choose **Save** after creating an appointment.
- You choose **Complete Appointment** after completing a service call appointment.
- You request a timesheet report.

Display the Sync page to prompt you to synchronize

After you create a service call, create or complete an appointment, or request a timesheet report, the Sync page is displayed. You must choose **Sync** to sync to the host system.

Field	Setting
UseEventBasedSync in the Admin Setup Options	**True**
Sync Login on the device	**On**

Automatically synchronize your device to the host system

After you create a service call, create or complete an appointment, or request a timesheet report, your device is automatically synced to the host system.

Field	Setting
UseEventBasedSync in the Admin Setup Options	**True**
Sync Login on the device	**Off**

If MobileTech is *not* set up to use event-based syncing, no event-based syncing occurs. The device will sync depending on your settings in the **Sync Login** or **Auto Sync** fields on the Setup page, or when you manually sync the device. See "Automatic syncing" and "Manual syncing" in this topic for more information.

Manual syncing

> ⚠ To manually sync with the host system from the Sync page, the **Sync Login** option must be marked on the **Options** tab on the Setup page.

To log on or to sync the host and your mobile device, follow these steps.

1. Choose the **Sync** icon.
2. Enter the following information. If you've previously used MobileTech on this client device, most or all of this information is shown as default entries.

Field	Description
Url	Enter the URL of the MobileTech Integration Sync Server. The URL must include the server name, website port number, and company database name. Example: http://servername:8888/companydatabase
User Name	Enter your user name. This is the email address that was set up for you by an administrator in MobileTech Administration to use when you log on to a client device.
Password	Enter the password that is associated with your user name.
Save Password	Mark this option if you want the application to remember your password after you exit and start MobileTech again. Don't save your password if you're using a shared client device. If you don't save your password, it is saved only during this session. You won't have to re-enter your password the next time you sync during this session.

3. Choose the **Sync** icon. If you encounter any issues while you're syncing, you can review and resolve by choosing **Sync Errors**. For more information, see <u>Resolving sync issues</u>[34].

MobileTech Client Setup on a Mobile Device

- <u>Setting up default pay codes</u> (page 48)
- <u>Setting up technician preferences on a mobile device</u> (page 48)
  - <u>Options tab</u> (page 48)
  - <u>Time Entry tab</u> (page 50)

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3 https://wennsoft.atlassian.net/wiki/spaces/mt75/pages/6815936/Resolving+sync+issues
4 https://wennsoft.atlassian.net/wiki/spaces/mt75/pages/6815936/Resolving+sync+issues

Setting up default pay codes

To save time when you create unbilled and billable time, expense, and travel entries, you can set up default pay codes that are displayed for time and expense entries. You can select a different pay code, if necessary, when you complete an entry on your mobile device.

If you don't set up pay codes, the pay codes from the labor, travel, and expense settings in the MobileTech setup are used. If no pay codes are set up there, default pay codes aren't displayed.

1. Choose **Setup**. On the Setup page, choose the **Time Entry** tab.
2. Select pay codes to use for unbilled hourly, expense, and travel entries when you create timesheet entries.
3. Select pay codes to use for billable hourly, expense, and travel entries when you create time entries for appointments.
4. Choose the **Save** icon.

Setting up technician preferences on a mobile device

Choose **Setup** in MobileTech to enter your preferences for working with MobileTech and to set up sync preferences.

> ⚠ If you're using an iOS device, these fields may be displayed on just one tab.

For more information, see these sections:

- Setting up default pay codes (page 48)
- Setting up technician preferences on a mobile device (page 48)
    - Options tab (page 48)
    - Time Entry tab (page 50)

Options tab

Field	Description
ACCOUNTS	
XOi	Choose **Connect** and enter your XOi username and password.
NETWORK	
Auto Sync	Choose **Never** if you prefer to manually sync your mobile device to the host system when you log on to MobileTech. Choose **On Start** to automatically sync your mobile device to the host system when you log on to MobileTech. If you choose **On Start**, you can indicate in the **Auto Sync Delay (sec.)** field how long – in seconds – after logging on that the device is synced.
Auto Sync Delay (sec.)	Enter the number of seconds after which your device should automatically be synced with the host system when you log on to MobileTech. You must choose **On Start** in the **Auto Sync** field to activate automatic syncing.

Sync Login	Choose **On** to require that you log on to MobileTech before you sync your mobile device. Choose **Off** if you want to be able to sync your mobile device without logging on to MobileTech.
Save Password	Choose **On** to save your logon password for the device that you're using. If this option is on, you don't have to enter your password each time you log on to MobileTech. If you choose **Off**, you must enter a password on the device when you start MobileTech.
APPEARANCE	
Max Image Size	Choose the maximum image size.
Search Buttons	Choose **On** to display the filtering and sorting options on the search bar. For more information, see <u>Searches, filters, and sorting options</u>[56].
Map	Choose **On** to make the **Map** button available. ⚠ Locations on maps are displayed only if coordinates for locations are entered in Service Management. Contact your system administrator about making changes to the Service Management SV00200 table.
Dashboard	Choose **On** to activate the dashboard. By default, the dashboard shows service appointment, job appointment, and technician activity information that is specific to your appointments. You can view and open any of the job appointments, service appointments, or technician activities that are assigned to you. If you choose **Off**, the **Dashboard** option isn't available.
Full Screen (Windows only)	If you're using a Windows device, choose **On** to display MobileTech in full-screen view. The title bar, including the icons for minimizing, maximizing, and closing the app, won't be displayed.
Ask Before Exit (Windows only)	If you're using a Windows device, choose **On** if you want to be prompted for a confirmation before closing MobileTech.
ADVANCED	
Delete Data	Use this option to clear the local database. After you've entered information by using your mobile device and synced data, you can delete data, which lets you manage your device memory and optimize performance by removing old files.

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5 https://wennsoft.atlassian.net/wiki/spaces/mt75/pages/6815932/Searches%2C+filters%2C+and+sorting+options
6 https://wennsoft.atlassian.net/wiki/spaces/mt75/pages/6815932/Searches%2C+filters%2C+and+sorting+options

Max Attachment Size (Windows and iOS only)	If you're using a Windows or iOS device, select the file size of attachments, such as photos. If you're viewing an image that exceeds this size, it's resized to the maximum image size for viewing purposes, and then returned to its original size. If you take a photo with your device, this is the maximum size of the photo.
Display Density (Android only)	If you're using an Android device, use this field to change the size of the content on the screen. You can use this setting to display more or less content, depending on the size of the screen and your preference.
Max Attachment Size	The maximum size of any file that can be attached to records. This setting can't be changed on the device. This is a Woodford setting.
Max Sync Records	The maximum number of records that can be synced to the mobile device for one entity. The default maximum is 30,000 records at one time, but you can decrease that number.
Diag. Sync Log	Use this option to log details for synchronizations.

Time Entry tab

To save time when you create unbilled and billable time, expense, and travel entries, you can set up default pay codes that are displayed for those types of entries when you create transactions. However, you can select different pay codes, if necessary, when you complete an entry on your mobile device.

Pay codes are set and assigned to individual technicians in Service Management.

Set up Information in Microsoft Dynamics GP

This section helps administrators set up various types of information in the host system that technicians can access as they enter information and complete tasks using mobile devices.

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Set up TimeTrack

Maintaining history

You must set up TimeTrack to maintain history so TimeTrack transactions appear correctly on the Call Summary report, especially after the TimeTrack batches are committed.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options*. The TimeTrack Setup Options window is displayed.
2. In the *Miscellaneous Items* section, mark **Maintain History**.
3. Choose *Save*.

Entering unbilled transactions

If technicians will enter unbilled TimeTrack transactions in MobileTech, you must set up the host system to handle those transactions properly.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > TimeTrack > Setup Options*. The TimeTrack Setup Options window is displayed.
2. In the *Create a GL Journal Entry For* section, mark **Unbilled Transactions**.
3. Choose *Save*.
4. Set up unbilled asset accounts. For information, see the TimeTrack documentation.

Setting up manager approval

In the TimeTrack User Guide, see *Setting up the manager approval feature* for more information regarding setting up the manager.

If technicians submit timesheets that need manager approval, you will need to set up the following in the TimeTrack Setup Options window:

> ⚠ In the TimeTrack Setup Options Email Notification section, the option to **Notify Manager when Employee has Updated Rejected Trx** is not honored in MobileTech. If marked, the manager will not receive email notifications. The manager will receive a notification when the technician resubmits the timesheet if **Notify Manager when Employee Submits Time Card for Approval** is marked.

Verify technician and manager setup in Signature Registered Users Setup

In order for the technician's manager to be notified by email, you will need to verify that the manager's email address is set up in TimeTrack's Registered Users Setup window. In the TimeTrack User Guide, see *Signature registered users* and *Setting up the manager approval feature* for detailed information.

Set up attachments to be sent to technicians

Before you can send document attachments to technicians, you need to select and set up the actual files to attach and send. For more information about document management, see the Service Management documentation.

1. In Microsoft Dynamics GP, open a service call.
2. Choose the attachment (paperclip) icon next to the **Service Call ID** field. The Document List window is displayed.
3. Choose *Add*. The Document Maintenance window is displayed.
4. Select a format and a file.
5. Choose the **Copy To Database** option. Copy to Database must be selected in order to send attachments to devices. Attachments will not be sent to the device if you do not choose this option.
6. Specify any additional information and choose *Save*.

Give technicians access to inventory items

To track inventory items that a technician uses on a service call, make sure the technicians have access to the appropriate inventory sites.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > Service Management > Lookup Setup > Technicians > Technicians*. The Technician Setup window is displayed.
2. Select the technician ID.
3. Choose *Inventory Sites*. The Technician Inventory Site Setup window is displayed.
4. Mark the **Assigned** checkbox for the inventory sites that are associated with the technician.
5. Choose *OK*, and then choose *Save* in the Technician Setup window.
6. Repeat steps 2 through 5 for each technician.
7. Open MobileTech Administration and choose *Load Data*.
8. Select a technician and a date range.
9. Make sure the **Sync Lookups** checkbox is marked.
10. Choose *Import*.

Set up billable and unbillable pay codes

You can specify which pay codes are billable, unbillable, or both, and then send those pay codes to devices for technicians to use for time, expense, and travel entries.

1. In Microsoft Dynamics GP, choose *Inquiry > Service Management >Mobile Pay Code Setup*. The MobileTech Pay Code Setup window is displayed.
2. Choose whether each pay code is billable, unbillable, or both. The default value is **Both** for all pay codes.
3. Choose *OK*.

Set up resolution note snippets

You can set up resolution note snippets in Service Management to help you track work that is completed by technicians. These snippets provide a uniform method for technicians to report how they resolve issues and complete appointments. Technicians can include these snippets in the **Resolution Note** field in MobileTech.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > Service Management > Lookup Setup > Service > Resolution Note Snippets*. The Resolution Note Snippets window is displayed.
2. Enter a resolution ID and a description of up to 255 characters.
3. Choose *Save*.

Assign items to vendors and create records for unknown vendors

If a technician purchased items from a vendor who is not already entered in the system, complete these steps.

You also need to complete step 2 if both the item and vendor already exist in the system, but the item is not assigned to the vendor from whom it was purchased.

1. In Microsoft Dynamics GP, choose *Cards > Purchasing > Vendor*. In the Vendor Maintenance window, create a record for the vendor.
2. In Microsoft Dynamics GP, choose *Cards > Inventory > Vendors*. In the Item Vendors Maintenance window, assign the item that was purchased to the vendor record that you just created.

Give technicians access to vendors

By default, vendors in Microsoft Dynamics GP are visible to technicians, who can select a vendor while creating a purchase order. You can designate which vendors the technicians can select if you do not want all vendors to be displayed in lookup lists.

1. In Microsoft Dynamics GP, choose *Inquiry > Service Management > Mobile Vendor Setup*. The Mobile Vendor Setup window is displayed.
2. Unmark the checkbox next to vendors if you do not want the vendors to be displayed in lookup lists in MobileTech.
3. Choose *OK*.

Verify mobile vendor setup for drop-ship purchase orders

- You can receive committed and partial drop-ship purchase orders for job appointments and service calls from mobile vendors. Drop-ship purchase orders are saved and committed in Microsoft Dynamics GP *(Transactions > Purchasing > Purchase Order Entry)*.
- Mobile vendors must be set up in Service Management *(Inquiry > Service Management > Mobile Vendor Setup)*. For more information, see Give technicians access to vendors[7].
- Freight and miscellaneous charges that are entered for purchase orders in Microsoft Dynamics GP are not synced to the device. However, technicians can enter the amounts from the invoices when they receive shipments in the field.

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[7] https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6815845#SetupInformationinMicrosoftDynamicsGP-give-techs-access-to-vendors

Verify Signature Document Attachments setup

In the host system, the Signature Document Attachments Setup window is used to set up the file locations where reports are copied when they are generated and attached to service calls. For information about how to set up service call task attachments and physically stored document attachments in Service Management, see Signature Help or the Service Management User Guide.

The reports can be reprinted in Service Management by opening the service call attachments. We recommend that users reprint the reports from the attachments rather than regenerating the reports, because regenerated reports might differ from the original versions and will not include signatures.

For information about how to set up attachments to be sent to technicians, see <u>Set up attachments to be sent to technicians _(page 52)</u>.

Set up and use work crews for appointments

You can create work crew who work together at job or service appointments. For example, a team that installs heating systems or does survey work could be a work crew. You must set up work crews in TimeTrack, and then the activities of the crews can be tracked in MobileTech. Depending on how your system is set up, at least one of these options in MobileTech Administration must be set to **True**:

- UseWorkCrewJobCost
- UseWorkCrewService

A technician who enters time for an appointment must be assigned to the work crew that is completing the work for the appointment.

Set up work crews

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > TimeTrack > Work Crews*. The Work Crew Setup window is displayed.
2. Enter a work crew name and description.
3. Mark the **Enabled** checkbox.
4. Choose *Save*, and then continue to set up work crews as needed.

Assign employees to work crews

You must set up employees as TimeTrack users in the Signature Registered Users Setup window *(Microsoft Dynamics GP > Tools > Setup > TimeTrack > Registered Users)* before you can assign individuals to work crews. After employees are set up as TimeTrack users, use the Work Crew Employee Setup window to assign individuals to work crews.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > TimeTrack > Work Crew Employees*. The Work Crew Employee Setup window is displayed.
2. Select a work crew.
3. In the **Signature Registered Employees** grid, select an employee and choose *Insert* to add the employee to the work crew. To remove a crew a member, select the employee in the **Crew Members** grid and choose *Remove*.

> ⚠ If an employee who was a member of a work crew has an *Inactive* status, choose *Synchronize* in the Work Crew Employee Setup window. The employee is removed from the work crew.

Set up job safety audit (JSA) information

Use this information to set up JSA task lists and task codes in Microsoft Dynamics GP. For more information, see the Service Management documentation.

For information about the JSA setup options in MobileTech Administration, see <u>Job Safety Tasks _(page 23)</u>.

Create an unsafe work environment indicator

If technicians determine there are safety issues that could prevent them from performing work, those technicians can alert the office that the site is unsafe and provide a record in the host system.

To allow this, create an appointment status for unsafe work environments. For example, if you create an appointment status of **Unsafe**, the technician could change the appointment status to **Unsafe** and send the appointment back to the host system. The appointment would be removed from the technician's device after syncing.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > Service Management > Lookup Setup > Service > Appointment Status*. The Appointment Status Setup window is displayed.
2. Enter a name for the appointment status.
3. Complete the remaining fields, as necessary, and choose *Save*.

Create the JSA task list type

When you create a task list type of **JSA**, you indicate that the tasks are safety tasks that are handled differently than other task types. All job safety task lists must have a task list type of **JSA**.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > Service Management > Lookup Setup > Tasks > Task List Types*. The Task List Type Setup window is displayed.
2. Enter *JSA* and choose *Save*.

Create task codes for JSA tasks

You must create task codes that will be assigned to JSA task lists. The task codes define the specific conditions that a technician must validate before starting work on a service call.

For information about recommended naming conventions, see <u>Naming conventions for JSA task list IDs and task codes</u>[8].

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > Service Management > Lookup Setup > Tasks > Task Codes*. The Task Code Setup window is displayed.
2. Enter a task code and description.
3. You can also set up responses for each task. For information, see <u>Set up responses for JSA tasks</u>[9].
4. Complete the remaining fields, as necessary, and then choose *Save*. Repeat these steps for each task code that you need to set up.

> ⚠ Skill levels have no effect on JSA task codes.

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[8] https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6815845#SetupInformationinMicrosoftDynamicsGP-naming-conventions

[9] https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6815845#SetupInformationinMicrosoftDynamicsGP-setup-responses

Set up responses for JSA tasks

When you create task codes, you can also set up responses so technicians can respond to the tasks in the task list.
You can use either **List** or **Text** response types.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > Service Management > Lookup Setup > Tasks > Task Codes*. The Task Code Setup window is displayed.
2. Enter or select a task code.
3. Choose the *Responses* button. The Task Responses Setup window is displayed.
4. Select a response type:
   - **List**: Provides the user with a drop-down list of user-defined responses in the service call.
   - **Text**: Provides the user the ability to enter a text response. Text responses are stored in the database, but are not displayed on the JSA report.

   > ⚠ The Text option can *only* be used once per task code and only as the last non-None row. All further rows will be set to None.

5. Enter a label for the response field. This typically is the condition that must be validated or the question that must be answered, such as *Is there a sign-in and sign-out procedure?*
6. If you selected the **List** response type, choose the **Responses ID** link. The Task Responses List Setup window is displayed.
   a. Enter or select a responses list ID.
   b. Enter *Yes* and *No* as the values that will appear in the list. Depending on your organization's policies, you can enter just *Yes* and *No*, or you can enter a longer value by typing *Yes* or *No*, a space, a hyphen, another space, and then the description. **Example:** *Yes – Sign in and out using the appropriate procedure.*

   > ⚠ Only values that include more than three characters are displayed in the *Risk control measures* section of the JSA report. Values of **Yes** and **No** will not be displayed.

   For more information about setting up responses, see "Setting up task responses" in the Service Management documentation.
7. Complete the remaining fields, as necessary, and then choose *Save*. Choose *Save* again in the Task Code Setup window.

Create JSA task lists and add task codes

For each category of safety tasks, you must specify an integer as the task list ID. For example, if the category is **Electrical**, the ID could be **1** and have a description of **Electrical**.
Task list IDs must be numeric. For information about recommended naming conventions, see Naming conventions for JSA task list IDs and task codes[10].
All job safety task lists must have task list type of **JSA**.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > Service Management > Lookup Setup > Tasks > Task Lists*. The Task List Maintenance window is displayed.
2. Enter a task list ID and description.

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10 https://wennsoft.atlassian.net/wiki/pages/resumedraft.action?draftId=6815845#SetupInformationinMicrosoftDynamicsGP-naming-conventions

> ⚠ Task lists for personal protective equipment must have an ID of **99**. In addition, **JobSafetyTaskListType** must be set to **JSA** in the *Job Safety Tasks* area of the setup options. Otherwise, values will not be displayed in the *Personal Protective Equipment* section of the JSA report.

3. Select **JSA** as the task list type.
4. Complete the remaining fields, as necessary, and then choose **Tasks**. The Task List Detail window is displayed.
5. Select the task codes to include in the list and choose *Insert* to add them to the task list. For more information about using the fields in this window, see "Creating a task list" in the Service Management documentation.
6. Choose *OK*, and then choose *Save* in the Task List Maintenance window.

Naming conventions for JSA task list IDs and task codes

When you set up JSA information, you will create task codes, and then assign those task codes to the JSA task lists that you create.

Task list IDs must be numeric, and we recommend that you use a naming convention that groups together the task codes that will be assigned to each JSA task list. This lets technicians navigate through categorized lists of tasks in the appointment details, so they can respond to the tasks without having to open and save each task individually.

For example, suppose you plan to create task lists for servicing electrical, elevator, and HVAC systems. You might categorize them in this way.

Task List ID	Description	
1	ELECTRICAL TASKS	
	Task Code	**Description**
	1.1	Are you working near energized power?
	1.2	Can electrical work be done with the power off?
	1.3	Does live power work involve removal, replacement, etc.?

Task List ID	Description	
2	ELEVATOR TASKS	
	Task Code	**Description**
	2.1	Are you working in a confined space?
	2.2	Is there a safe emergency escape route from the work area?
	2.3	Is lighting in the work area adequate?

Task List ID	Description		
3	HVAC TASKS		
	Task Code	**Description**	
	3.1	Are you in a noisy environment?	
	3.2	Are you using a ladder or stepladder?	
	3.3	Are you working above 6 feet in height?	
	3.4	Are you within 3 feet of a roof edge?	

Set up sublocations for barcoding

The barcode functionality is available for equipment, sublocations, and inventory. The supported barcodes are those in the ZBar library including: EAN-13/UPC-A, UPC-E, EAN-8, Code 128, Code 39, Interleaved 2 of 5, and QR Code.
The barcode feature allows the field technician to:

- Scan a barcode from a piece of equipment or a sublocation with the MobileTech device for easy navigation and accessibility to the assigned tasks.
- Scan a piece of equipment to add it to an existing service call or to add it to a new service call.
- Scan and record a barcode for a new piece of equipment at a customer site.
- Scan a barcode for an existing piece of equipment, if a barcode doesn't already exist, to update the equipment record with the barcode scanned.
- Automate the entry of an inventory part number during the appointment completion process.

Before technicians can scan a sublocation barcode from the **Service Calls** or **Appointments** lists, you must select sublocation validation in Service Management and set **UseBarcoding** to **True** in MobileTech Administration.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > Service Management > Module Setup > Service Options*. The Service Options window is displayed.
2. In the *Premier Options* section, mark **Use Validation for Sublocations**, and then choose *OK*. This makes the *Sublocations* button available in the Location window.
3. In Microsoft Dynamics GP, choose *Cards > Sales > Customer*. Enter or select a customer. Choose the *Location* button, enter or select a location, and then choose the *Sublocations* button. The Sublocation Maintenance window is displayed.
4. If a barcode is associated with the sublocation, add a sublocation barcode.
5. Save the changes.
6. In MobileTech Administration, choose *Setup Options*. Under **Mobile Device Global Settings**, make sure **UseBarcoding** = **True**.

Using MobileTech

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Information Processing in Microsoft Dynamics GP

This section provides information about how host system users process information that was entered in MobileTech.

Process Field Invoices and Payments

Invoices and payments that are generated from MobileTech are processed and posted in Microsoft Dynamics GP and in Service Management using the same tasks and procedures for invoices that are created in Service Management.

If you have set up Third Party Billing in Service Management, the field invoice respects the Bill to information provided in the Service Call. For more information about setting up Third Party Billing, see "Using Third Party Billing" in Service Management help.

If your organization uses Field Invoicing and Field Payments, when technicians create an invoice on a device after they complete appointments for a service call, the technicians can preview and verify the information on their devices, generate a field invoice, and then sync it to the host system. If they are authorized to do so, technicians can also collect payment for the invoice.

> ⚠ If a technician's time card in TimeTrack has been committed by a back-office user (such as someone in the Payroll department), and this occurred before the service call was completed and the field invoice was generated, that labor expense will not be displayed on the field invoice.The labor expense will be displayed if the time card has not been committed, or if it has been committed and the expense transaction has been posted.

After invoices or payments are received in the host system, the invoice is attached to the service call. The Receivables Management batch and the transactions are automatically created. This batch has a prefix of FLDINVC<current system date> and can be posted just like any other batch.

Field invoicing is available only if Field Invoicing and Field Payments is registered, and **UseFieldInvoicing** = **True** in the setup options in MobileTech Administration. Field payments are available only if Field Invoicing and Field Payments is registered, and if both **UseFieldInvoicing** and **UseFieldPayments** = **True** in the setup options.

> ⚠ MobileTech is not integrated with a credit card vendor. If you want technicians to be able to accept credit card payments from customers, you must set up credit card information for your company in the Credit Card Setup window in Microsoft Dynamics GP *(Microsoft Dynamics GP > Tools > Setup > Company > Credit Cards)*. For more information, see the Microsoft Dynamics GP Help.

For information about how to create field invoices and collect payments on a device, see Field Invoices and Customer Payments[11] in the MobileTech Help. For information about how to process invoices and payments in the host system, see the Service Management documentation.

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11 https://wennsoft.atlassian.net/wiki/spaces/mt75/pages/6815993/Field+invoices+and+customer+payments

> ❗
>
> Field invoice restrictions
>
> Field invoices created in MobileTech have the following restrictions in Service Management:
> - Regardless of unposted costs setup options in Invoice Setup, if a field invoice is created in MobileTech, all unposted costs associated with the MobileTech invoice must be posted before the invoice, or the batch containing the invoice, can be posted.
> - Field invoices cannot be:
>   - Deleted or voided.
>   - Edited, including from the Receivables Management batch.
> - Adjustments such as credit memos, amount changes that constitute adjusting entries, etc., must be made manually using separate transactions.
> - Costs associated with a field invoice:
>   - Cannot be deleted.
>   - Should not be edited. Regardless of a cost edit, billing amounts will not be updated.
>
>   > ⚠ Editing costs associated with a field invoice may result in inaccurate accounting entries.
>
> - The service call ID cannot be changed or removed from any unposted cost transaction that has an associated field invoice number.

Process Additional Work Requests for a Technician

When additional work requests arrive from a technician, process those requests by using the Mobile Additional Work window in Service Management.

1. In Microsoft Dynamics GP, choose *Inquiry > Service Management > Mobile Additional Work Inquiry*. The Mobile Additional Work window is displayed.
2. Mark the checkbox next to an additional work record and use the following buttons for the additional work requests. You can also choose *Mark All* or *Unmark All* to include or exclude all requests.
    - **Process**: When you finish reviewing a request, choose *Process*. The user who processed the request is listed in the **Followed Up By** field in the Mobile Additional Work window that is opened from the Service Call window.
    - **Redisplay**: Refresh the window if other work requests have been created since you opened the window. The window is refreshed every time you open it.
    - **Print**: Print the selected work requests. To print all work requests, choose *Mark All* to select all the requests.
    - **Delete**: Delete the selected work request. When you delete a request, no record of it remains in the system. You can print a list before deleting, if necessary.
3. If a technician has added an attachment to an additional work item in MobileTech, the icon changes from a paperclip to a paperclip attached to paper. Once the additional work request is handled the attachment remains with the additional work record. To view the attachment, focus on the additional work row and then choose the additional work icon to open the Document List window. This window displays the following information from the additional work item:
    - Service Call
    - Appointment
    - Additional Work Date
    - Additional Work Time

Choose the attachment listed in the scrolling window and then choose to *Edit* or *Display*. You can also add a file to this additional work record by choosing *Add*.

Process Purchase Orders in Service Management and Purchasing

A purchase order that is entered in MobileTech by a technician 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.

> ⚠ To allow technicians 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.

- Process purchase orders that were entered by technicians (page 61)
- Post purchase orders in Microsoft Dynamics GP (page 61)

Process purchase orders that were entered by technicians

After a purchase order has been synced with the host system, you can view and process the purchase order in Service Management.

Costs that are associated with a purchase order are displayed in Service Management as committed costs on the service invoice.

1. To view and process purchase orders that were sent from MobileTech, in Microsoft Dynamics GP, choose *Inquiry > Service Management > Mobile Purchase Order Inquiry*. The Mobile Purchase Order window is displayed.
2. You can choose *Print* to print the Mobile Purchase Order report, which displays information about the purchase orders that need to be processed.
3. Select the transactions from MobileTech to process and choose *Process*.
4. Choose *Redisplay* to update the list of purchase orders that were submitted by technicians.

Post purchase orders in Microsoft Dynamics GP

1. To post purchase order transactions in Microsoft Dynamics GP that originated from MobileTech, in Microsoft Dynamics GP, choose *Transactions > Purchasing > Purchase Order Entry*. The Purchase Order Entry window is displayed.
2. In the **PO Number** field, select a purchase order.
3. View and change other information as needed. For example, you can add freight, tax, and miscellaneous amounts to the purchase order.

> ⚠ A purchases tax schedule for a company must be set up in the Company Setup window *(Microsoft Dynamics GP > Tools > Setup > Company > Company)* before you can process taxes for purchase order receipts.

4. Choose *Commit*. Purchase orders that are committed are available in MobileTech so that technicians can enter purchase order receipts for inventory items.

Process Inventory and Non-Inventory Item Transactions

Use the Mobile Inventory window to process inventory transactions that are entered by technicians.

> ⚠ If you use Sales Order Processing (SOP) invoicing, an item number cannot exist as both an inventory item and a non-inventory item. If an item in the Mobile Inventory window has the same item number as an inventory item, but it was sent from MobileTech as a non-inventory item, the location code will be blank and the item will not process successfully. You will receive an error saying that the item number/location code does not exist in Inventory. You must delete the line from the Mobile Inventory window and process the item correctly in SOP for the service call.

1. In Microsoft Dynamics GP, choose *Inquiry > Service Management > Mobile Inventory Inquiry*. The Mobile Inventory window is displayed.The items and part numbers that were entered by technicians for service calls are displayed. To delete a record, select the item or part and choose *Delete*.
2. Choose *Process* to process the transactions.

> ⚠ You cannot process individual lines or items. All transactions that are displayed are processed at the same time.

Transactions that are processed successfully no longer appear in the window. Transactions that are not processed successfully are displayed on the Mobile Inventory report. To print the report, choose *Print*.

Approving/Rejecting Timesheets

For information on how manager's approve timesheet transactions, in the TimeTrack User Guide see *Approving or rejecting TimeTrack transactions*.

Process Contact Management

Location Contacts that are entered in MobileTech by a technician must be reviewed and processed before the contacts are added and/or updated in Signature. Processing these contacts will add a master Local contact and assigns the contact to the location.

Technicians can add the following Contact information for a customer in MobileTech:

- **Contact Name** (required)
- **Email Address** (required)
- **Phone Number**
- **Phone Type**
- **Role** - Technicians can choose an existing role or add on-the-fly. See below for information on how to add the role type to Signature.

Processing the contacts

If an existing contact is edited in MobileTech, you may see more than one row in the Mobile Contacts window. For example, if a contact has three telephone numbers associated and the contact's role has been updated, you will see three rows of contact information to be updated; one row for each phone number. This is because MobileTech sees this information joined into a single entity and Signature Service Management sees this as multiple entities.

1. In Microsoft Dynamics GP, choose Inquiry > Service Management > Mobile Contacts.
2. The Mobile Contacts window displays contacts added in MobileTech.
3. Review the following information:
   - **Customer**
   - **Location** (required)
   - **Contact Name** (required)
   - **Phone Number**
   - **Phone Type**
   - **Email Address**
   - **Role** - If the technician created a new role for the contact, an error message "This is not a valid Contact Role Type." displays in the Error Message field. To clear the message, do one of the following options, followed by choosing the *Redisplay* button:
       - Clear the role field by highlighting the field contents and pressing Delete on your keyboard.
       - Edit the role name in the field to match an existing role.
       - Add the new role by marking the **Contact** checkbox and then selecting the **Role** zoom to open the Role Type Setup window. The message "This role type does not exist. Do you want to add it?" displays. Mark *Yes* , enter a description, and then choose *Save* . Close the Role Type Setup window.
       - Choose an existing Role Type by marking the Contact checkbox and then selecting the Role Type lookup to open the Role Type Lookup window. Select the Role Type and then choose *Select*.
   - **Created User** - Technician who added the contact.
   - **Contact ID**
   - **Phone ID**
   - **Error Message**
4. In the Mobile Contacts window, you can process the contacts individually by marking the contact checkbox and then choosing **Process** or you can choose the *Mark All* button and then choose *Process* to add all the contacts. Contacts will no longer display in the Mobile Contacts window once they are added to Signature.

Buttons on this window

- **Mark All** - Marks all Contact checkboxes.
- **Unmark All** - Unmarks all Contact checkboxes.
- **Process** - Adds the marked contacts.
- **Redisplay** - Refreshes the display.
- **Delete** - Deletes marked contacts.
- **Cancel** - Cancels the process.
- **Go To** - Choose this and then select Contact Management to open the Contact Setup window. (This window opens empty, no data automatically fills in this window.)

Completing Administrative Tasks and Procedures

This section provides information about tasks and procedures that administrators might occasionally have to complete in MobileTech Administration.

Refresh Specific Lookups

You can sync individual lookups in MobileTech to refresh a subset of lookups without loading all data.

1. In MobileTech Administration, choose *Tools > Refresh Lookups*.
2. Mark the checkbox next to the lookups that you want to refresh.

> ⚠ When you mark a lookup, other associated lookups might be marked, as well, if there are dependencies between the lookups. For example, if you mark the checkbox for a child lookup, the parent lookup automatically is marked because that must be refreshed, too.

3. Choose *Refresh*.

Change a Resco Administrator Password

If you or another administrator forgets an account password, you cannot retrieve the existing password, but you can change it.

> ⚠ This option is available only for users who belong to the SysAdmin role in SQL Server. These users can be Windows or SQL users.You can change the password for only one MobileTech administrator at a time.

1. In MobileTech Administration, choose *Tools > Change Resco Administrator Password*. The page displays a list of all the system users in the configuration database.
2. Select the administrator whose password you want to change. The *Databases for Account* area displays a list of all the company databases where the password will be changed.
3. Enter and confirm the new password.
4. Choose *Change Password*. The password will be changed for all the company databases that were listed in the *Databases for Account* area.

Using Report Maintenance

Use Report Maintenance to determine why a report has a status of FAILED in the middle-tier report table. Note that the report also must have a related appointment in the middle-tier appointment table to display in this window. After fixing the error(s), you can choose Process to attempt to re-process the report. Time-out errors can be fixed by simply processing the report again in this window.

> ⚠ This is not a reprint feature.

To use Report Maintenance:

1. In MobileTech Admin, choose *Report Maintenance*.
2. Reports with a status of FAILED in the middle-tier display in the window.
3. *Optional:* The reports that display can be filtered by choosing a column name from the **Column** drop-down. Enter a partial or whole word and then choose *Search*.
4. The scrolling window displays the following information:
   - Service Call ID/Job Number
   - Appointment
   - Technician
   - Customer
   - Location

- Report Type
- Created On date/time
- Error Message

> ⚠ To view the entire error message, you may need to use the scroll bar at the bottom of the window to scroll to the right. You may need to resize the column to view the entire message.

5. *Optional*: Choose a column heading to sort the displayed information.
6. Review the error message. You may need to use the horizontal scroll bar and/or resize the column to view the entire message.
   - If the report has a time out error, continue with step 6.
   - For all other errors, you must fix the error(s) and then return to this window.
7. Mark the report(s) to process, either individually or choose the checkbox to the left of the Service Call/Job column to select all.
8. Choose *Process*. If the report fails again, it will be displayed in the Report Maintenance window, otherwise the report will be attached to the appropriate Signature window.

View User Device Information and Sync Activity

You can use MobileTech Administration to view information about the devices that technicians are using, and the sync activity on those devices.

1. In MobileTech Administration, choose *Users*.
2. In the *Synced Devices* area, you can see a list of synced devices. For each device, you can see which version of MobileTech is installed, when it was last synced to the host system, the security policy for the device, and the operating system that is installed on the device.

Monitor Processes and Tasks by Using Integration Monitor

MobileTech Integration Sync monitors changes in the middle-tier database that are made in Microsoft Dynamics GP.

When you installed the integration sync, you entered a *task frequency*. This is how frequently the integration sync process runs to update changes that are made in Microsoft Dynamics GP.

To view changes that are waiting to go into the middle-tier database, in MobileTech Administration, choose *Integration Monitor*.

Contact Information

Support & Sales

Support Phone: 262-317-3800
Email: support@wennsoft.com
Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for more information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Presidents' Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veterans' Day, Thanksgiving Day, the Day after Thanksgiving, Christmas Day, and the Day after Christmas.

Support Plans

We're committed to providing the service you need to solve your problems and help your team maximize productivity.

We offer several Signature Enhancement and Support Plans to meet your needs and Extended Support Plans for retired product versions available at https://www.wennsoft.com/wsportal.

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